

Codemill Help Center Portal Getting Started Guide



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1 Introduction

The purpose of this guide is to provide you with detailed instructions on how to use the Codemill Help Center website portal where you can register support requests and communicate with our support team.

In this guide you can find instructions that helps you locate the website, register a new account, log in using your account, as well as create and manage support tickets of different types.

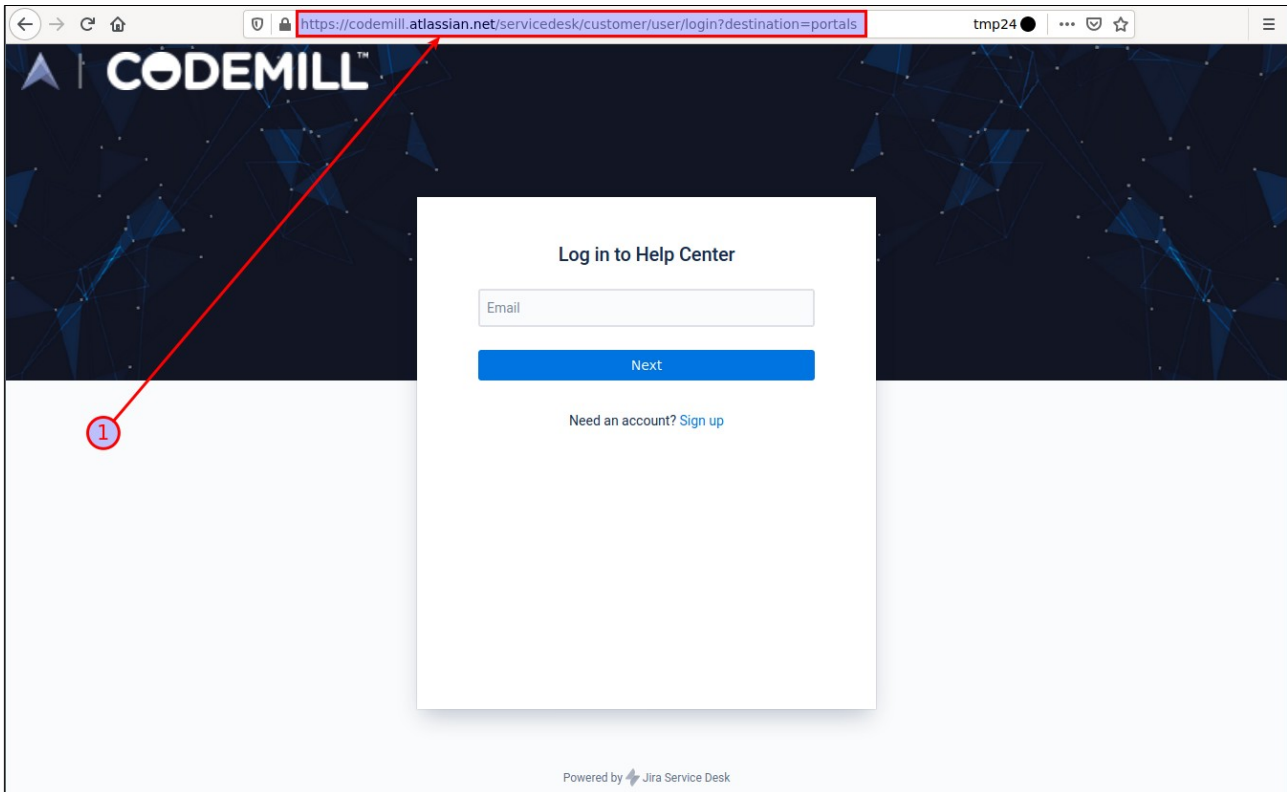
The Help Center is a web based service that requires no installation on your part.

For a shorter version that cover only the basics to get you registered and started we also offer the *Codemill Help Center Portal Quick Start Guide*.



2 Locating the Help Center website portal

Open your web browser and enter the URL <https://support.codemill.se/>. This URL is the only one that you need to remember in order to access the Help Center portal. However, note that the URL will redirect to another address shown at number ① in the figure below. This is by design and nothing to worry about.



As a next step, if you already have an account, you may skip to section **4 Inside the Help Center portal**.

If you have received an email invite from us you can click on the “Sign up” link in the email and proceed to step **3.3 Specifying your name and password**.

If you do not already have a Help Center account and have not received an invite, you will need to register for a new account by following the instructions provided in section **3 Signing up for a new account**.

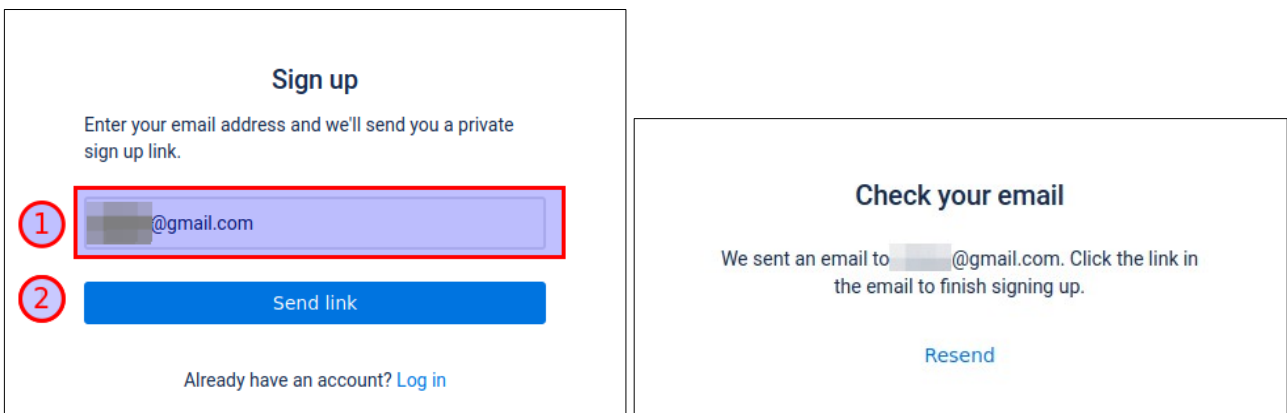


3 Signing up for a new account

When you have opened the Help Center web portal, you can register for a new Help Center account by following the steps below.

3.1 Registering your email address

On the “Sign up” screen in the figure below, enter your email address ① in the figure to the left and click the “Send link” button ②. The Help Center will then send you an email with a private sign up link which you need to use in order to complete the sign up process. This step is required in order to verify that your email address is correct.



After you have clicked the “Send link” button in the figure to the left you will see the screen in the figure to the right above.



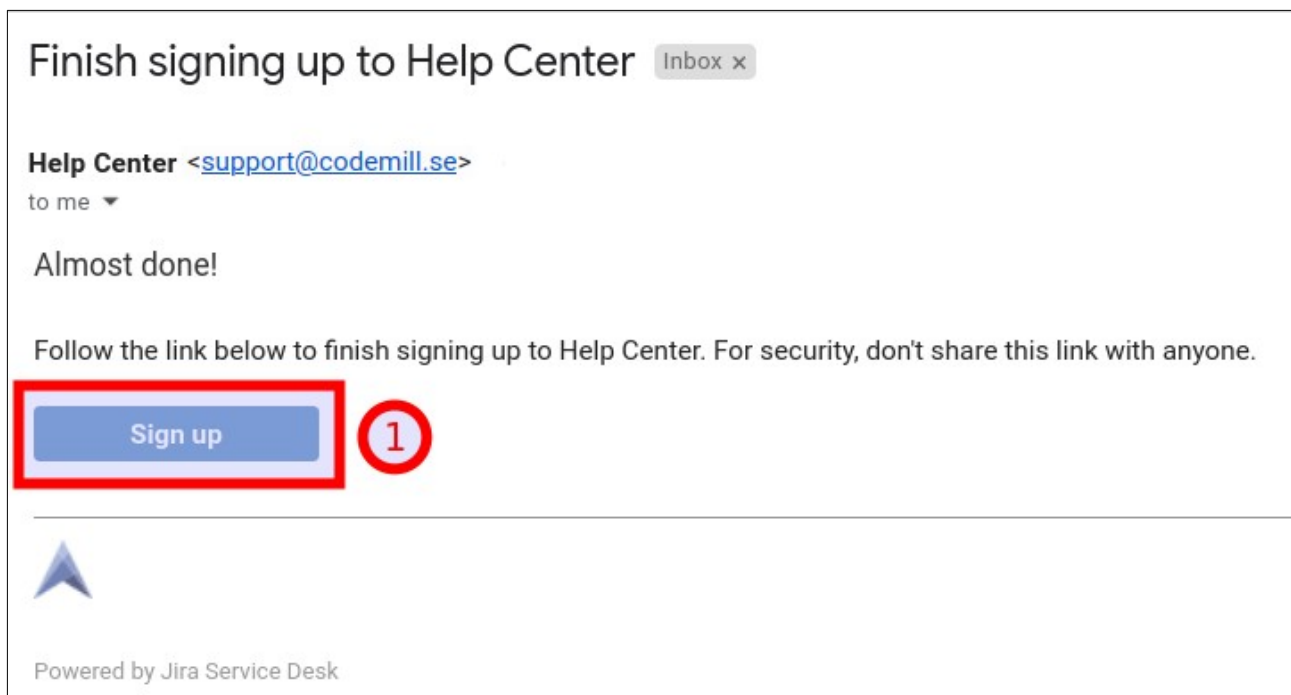
3.2 Verifying your email address

The Help Center will send you an email with a web link in order to verify that you provided a valid email address. Check your email inbox. If you fail to find any such email, try checking your spam box or spam filter.

The sender email address should be: support@codemill.se

Note also that some email providers use delays so it might take a few minutes or so for the email to arrive. If you still get no email and feel something must have gone wrong, you can make Help Center send another email by clicking the “Resend” link in the figure above.

To proceed with the sign up process, open the email message from Help Center and follow the “Sign up” link ① in the figure below. Note that the layout of the email message depends on the email software you use and might not appear the same as shown here.





3.3 Specifying your name and password

Once you have clicked the “Sign up” link in your email, you will be taken to a new web page, shown in the figure below, where you can enter your full name ① and password ②.

Please make sure you choose a secure password. You can get an estimate of how strong your password is by looking at the green bars and the strength comment under the password field ③. We recommend that it is “very strong” (or five green bars).

Click “Sign up” ④ when you have entered your name and password.

You have now registered an account and can start using the Help Center.

The screenshot shows a "Sign up" form with the following elements:

- 1**: A red circle with the number 1 pointing to the "Full name" input field, which contains the text "Maria Medelsvensson".
- 2**: A red circle with the number 2 pointing to the "Choose a password" input field, which is filled with 12 black dots and has an eye icon on the right.
- 3**: A red circle with the number 3 pointing to a strength indicator below the password field. It consists of five green bars of increasing length, with the text "Very strong" to the right.
- 4**: A red circle with the number 4 pointing to a blue "Sign up" button at the bottom of the form.

Below the password field, there is a line of text: "By clicking *Sign up*, you agree to the [Privacy Policy](#) and this [Notice and Disclaimer](#)."



4 Inside the Help Center portal

In order to log in to the Help Center web portal, first open the web page as detailed in Section 1 above.

Next, if you do not already have an account on the Help Center, you will need to register for one. Follow the instructions in Section 2 above in order to sign up for a new account.

4.1 Logging in to the portal

If you already have an account on the Help Center, you can proceed to log in by entering your email address ① and then click “Next” ② as shown in the figure below.

Log in to Help Center

① [input field with @gmail.com]

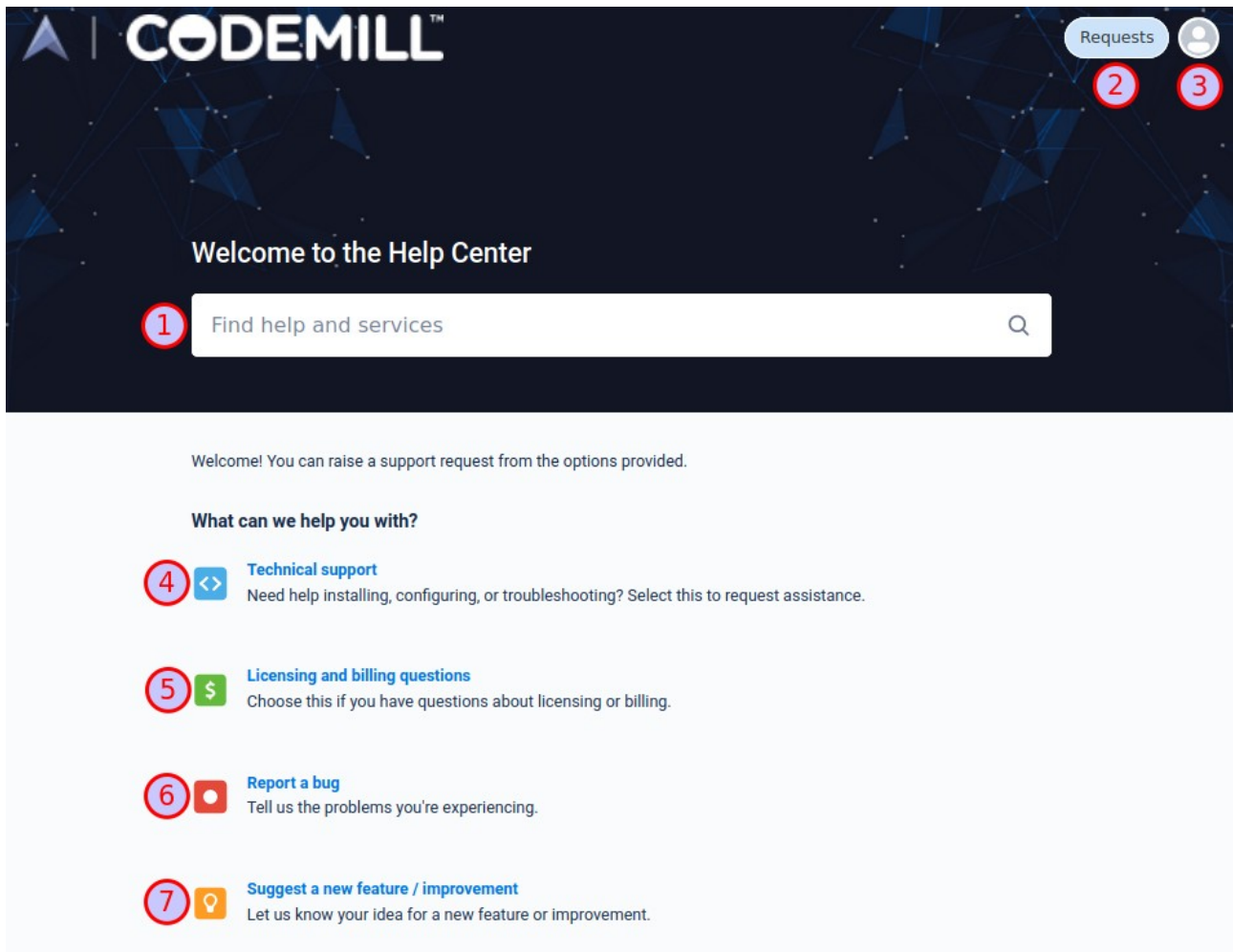
② [Next button]

Need an account? [Sign up](#)



4.2 Overview of the Help Center main page

When you have successfully logged in to the Help Center portal, you will see the main page, as shown in the figure below.



4.2.1 The main page search form

In the upper half of the screen, you can see a search form ① where you can enter keywords or phrases and get suggestions for documents to read based on what you searched for. Note that this functionality is currently work in progress and we will keep populating that search database with documents. If you fail to find the help you need in this search form, you can proceed to use one of the links ④ ⑤ ⑥ and ⑦ in the bottom half of the screen. Those four links will be covered in section 4.5 **Creating a new support request** below.

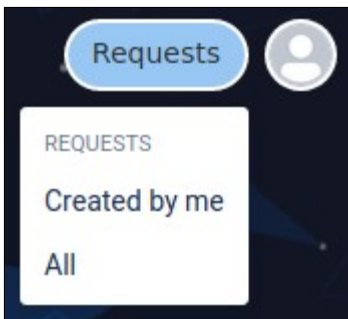


4.2.2 Accessing your existing support requests

Also in the upper half of the main page in the figure on the previous page you can see a button labeled “Requests” ②. By clicking on that button you will be able to access all the support tickets that you or your organisation has created.

Note: The organisation will only be seen if we have connected your account to an organisation. If your account was created from an invite you should already be part of an organisation. If you have registered for an account yourself or otherwise cannot find your organisation then you can create a support request and we will help you.

First you will see this sub menu:



By clicking on the “Created by me” or the “All” links you will get to the requests overview page which is covered below in section **4.4 The requests overview page**.

Next to the “Requests” label there can be a numeric indicator showing how many tickets you have. If this is the first time you log on, you will see no number there. The example below shows what it looks like if you have one ticket.





4.3 Your personal profile page

To the far right on the top of the main page, shown in the figure on page 7, is where you access your personal profile ③. By clicking this button you will get to your profile page where you can update your personal details as the figure below shows.

The screenshot shows the 'Profile' page in the Help Center. At the top left, it says 'Help Center' and 'Profile'. Below this is a light blue notification bar with an information icon and the text: 'Your changes may take up to five minutes to appear.' To the left of the form is a grey circular placeholder for a profile picture. The form is divided into sections: 'Personal details' and 'Language and time zone'. Under 'Personal details', there are three fields: 'Name' (containing 'Maria Medelvensson' with callout 1), 'Email' (containing a redacted address '@gmail.com'), and 'Password' (with a 'Change password' button and callout 2). Under 'Language and time zone', there are two dropdown menus: 'Language*' (set to 'Automatically detect browser ...' with callout 3) and 'Time zone*' (set to 'Europe' and '(GMT+01:00) Stockholm' with callout 4). At the bottom of the form is a 'Save' button with callout 5.

Here you can edit your name ①, password ②, your preferred language ③, and your time zone ④. The language and time zone settings are automatically detected by your web browser but may still need to be adjusted to your liking.

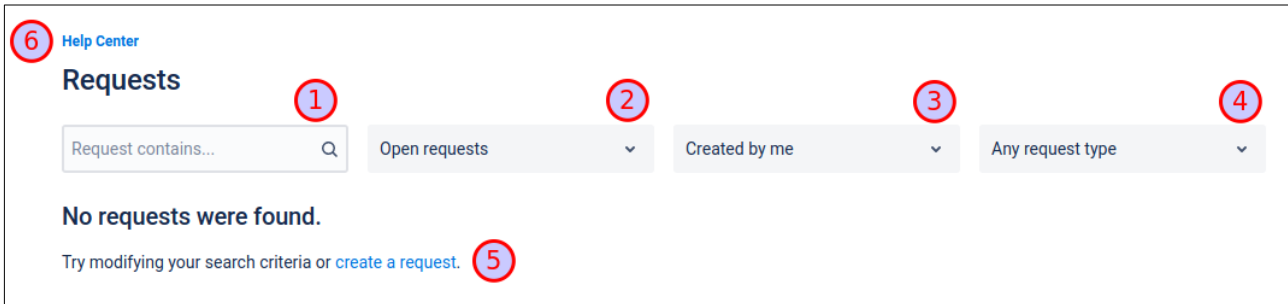
Do not forget to press “Save” ⑤ when you have edited your profile. Note also that the changes might take up to five minutes before they are displayed.



4.4 The requests overview page

The requests overview page is reached via the “Requests” button as instructed in section 4.2.2

Accessing your existing support requests:

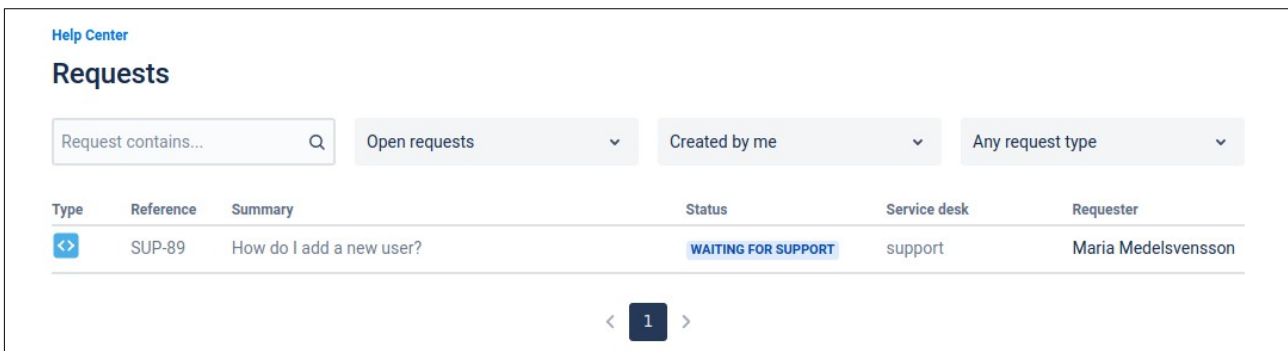


Once you start creating new requests/tickets they will appear as a list on this page.

Here you can also filter among your list of displayed requests/tickets based on: what you enter in the search form (1); tickets with a specific status (2), e.g. closed or open; the owner/creator of the ticket (3), i.e. which person in your organisation that the ticket is registered to; and tickets of a specific type (4), e.g. technical support, bug, suggestion for a new feature, or licensing/billing questions.

The links at (5) and (6) will take you back to the Help Center main page.

Below is an example of what the overview page looks like with one open ticket. (Note that the information details about the ticket will be explained in section 4.6 Managing an open ticket.)









4.5 Creating a new support request

In order to create a new ticket you first need to be on the Help Center main page. This section will only focus on the different types of ticket requests, as in the figure below:

Welcome! You can raise a support request from the options provided.

What can we help you with?

- 1**  **Technical support**
Need help installing, configuring, or troubleshooting? Select this to request assistance.
- 2**  **Licensing and billing questions**
Choose this if you have questions about licensing or billing.
- 3**  **Report a bug**
Tell us the problems you're experiencing.
- 4**  **Suggest a new feature / improvement**
Let us know your idea for a new feature or improvement.

Technical Support ①: If you need help with e.g. installing or configuring the software, or if you cannot figure out how to accomplish certain tasks, then you can register a “Technical support” request.

Licensing and billing questions ②: For non-technical questions concerning licensing and billing we recommend you choose this option.

Report a bug ③: If you notice the software is not functioning correctly, e.g. a button or link is broken or misbehaving or an image or some text seems incorrect, then you should report a bug. If you are not sure, you can also register a “Technical support” request.

Suggest a new feature/improvement ④: Last of all, if you have an idea on how the software can be made better, perhaps you want a new functionality or think some existing aspect can be improved, then we recommend you choose this option.



4.5.1 Technical support requests

When you choose to register a “Technical support” request, you will be taken to the next page, illustrated by the figure below.

The screenshot shows a web form titled "support" with the following elements:

- 1**: A dropdown menu for "What can we help you with?" with the selected option "Technical support" (Need help installing, configuring, or troubleshooting? Select this to request...).
- 2**: A text input field for "Summary *".
- 3**: A larger text area for "Description *".
- 4**: A dropdown menu for "Priority *" with the selected option "P4 - Minor issue condition or documentation errors".
- 5**: A dropdown menu for "Product *".
- 6**: An "Attachment" section with a dashed border, containing the text "Drag and drop files, paste screenshots, or browse" and a "Browse" button.
- 7**: "Send" and "Cancel" buttons at the bottom.



As shown in previous figure, you can change the request type ① if you change your mind about the type of request you selected.

The “Summary” field ② is meant as a brief explanation of the topic.

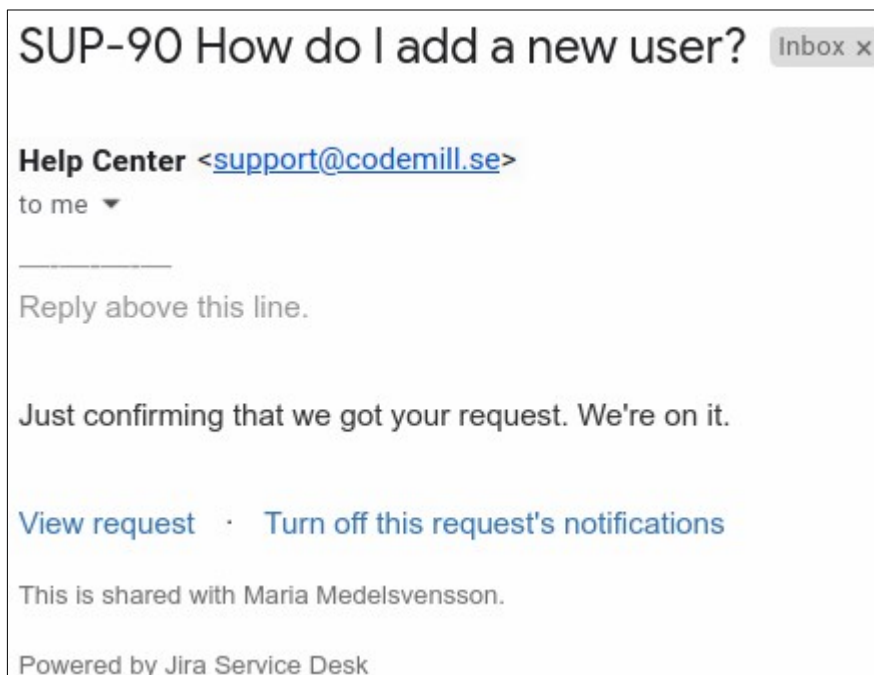
In the “Description” field ③ you should enter a more detailed explanation of what you need help with. Try to write down step by step what led to the issue. It might also be a good idea to include an error message/code or similar if you have seen one. We recommend that you try to provide enough details about your request to allow for our support team to start troubleshooting.

The “Priority” drop-down selector ④ is where you choose the severity of the issue. There are four different levels to choose from: “P1 – Emergency” (highest priority); “P2 – Solution severely affected”; “P3 – Limited issue condition”; and “P4 – Minor issue condition or documentation errors” (lowest priority). Note that P4 is the default.

At the “Product” selector ⑤ you can specify which particular product your request concerns. You can specify “Other” if none of the available options are suitable.

Last of all, at the “Attachment” field ⑥ you can upload files to be attached to the request. For instance, perhaps you have a screenshot or log file that illustrates the problem.

When you are finished filling out the form, click Send” ⑦. The request will be registered by the Help Center and the support team will be notified about the new request. You will also receive an automatic email notification. The figure below shows what such an email can look like (the layout may vary depending on your email software):





Moreover, once you have submitted the request, you will be taken to the screen for the request itself. This is covered in section **4.6 Managing an open ticket** below.

4.5.2 Licensing and billing questions

This request form is similar to the one detailed in section **4.5.1 Technical support requests**. Refer to that section for guidance on how to fill in the form.

4.5.3 Report a bug

This request form is similar to the one detailed in section **4.5.1 Technical support requests**. Refer to that section for guidance on how to fill in the form. The main difference is the field number ③ (in the figure on page **12**) which is called “Symptom” for the bug request type.

4.5.4 Suggest a new feature / improvement

This request form is similar to the one detailed in section **4.5.1 Technical support requests**. Refer to that section for guidance on how to fill in the form.



4.6 Managing an open ticket

Once you have created a new ticket request, you will be taken to the page for the ticket itself. The figure below shows what it can look like for a Technical support ticket. The layout is similar for the other types of support tickets.

The screenshot shows a ticket page with the following elements and callouts:

- 1**: Ticket ID "SUP-90" in the breadcrumb navigation.
- 2**: Ticket title "How do I add a new user?".
- 3**: User information: "Maria Medelsvensson raised this on Today 16:23" with a "Hide details" link.
- 4**: Description: "Hi! I cannot figure out how to add a new user in Cantemo Portal version 4.2.1. Please advice! Kind regards, Maria".
- 5**: Priority: "P4 - Minor issue condition or documentation errors".
- 6**: Product: "other".
- 7**: Status: "WAITING FOR SUPPORT".
- 8**: Notifications: "Notifications on" with a bell icon.
- 9**: Request type: "Technical support" with a code icon.
- 10**: Shared with: "Maria Medelsvensson Creator" with a user icon.
- 11**: Activity section header.
- 12**: Rich text editor toolbar with icons for font color, bold, italic, text color, list, link, image, and more.
- 13**: "Save" button.

Starting at the top of the page in the figure above you can see there is a ticket id number, SUP-NN (here shown as “SUP-90”) **1**. This number is unique to each request.

Next follows the summary of the ticket **2**.

Below the summary you can see which person registered the ticket and at what time and date this happened **3**. Next follows the description **4**, the priority or severity of the ticket **5**, and the product that the ticket concerns **6**.



On the right hand side of the figure you can find the status or state of the ticket ⑦. The current state depends on where in the workflow the ticket is currently being processed. For Technical support tickets the most relevant states are: “Waiting for support”, which means the support team needs to respond; “Waiting for customer”, which means the support team is waiting for feedback from the customer; and “Completed”, which means the ticket has been resolved.

Below the status you can see and change the notification behaviour for the ticket ⑧.

Next is the request type of the ticket ⑨. The different types were covered in the beginning of section **4.5 Creating a new support request**.

The last item on the right hand side shows who in your organisation can access your ticket ⑩.

Further below to the left you see “Activity” ⑪ which is a page delimiter where the remainder of the page will list all comments (if any) followed by the comment field. In the example in the figure above there are currently no comments. Otherwise, they would be listed there in chronological order with the oldest comment first. The figure on the next page shows what it can look like when there are responses.

Last of all is the comment form ⑫ where you can write your replies to the support team. Do not forget to press “Save” ⑬. Once you have submitted a new comment, the status ⑦ of your ticket will update to “Waiting for support” and the support team will be notified immediately.

All replies from the support team regarding your tickets will also be delivered to your email account. The subject of the email will always begin with SUP-NN (e.g. “SUP-90”) and be followed by the summary ②.



The figure below shows what it can look like when there are responses under the “Activity” separator ①.

Here you can see that a support engineer has replied ②. Below this first response, you can see an “Automatic response” ③ which informs you that the status of the ticket has changed. This is also reflected in the status field ④. In this specific example, the support engineer is expecting a reply from the customer. The customer can then reply ⑤ and click “Save” ⑥. After that, the customer’s own reply will appear at the bottom of the comments list, followed by another automatic response. Moreover, the status of the ticket will be updated to “Waiting for support” and the support team will be notified.

The screenshot shows a help center ticket page for the topic "How do I add a new user?". At the top, the breadcrumb "Help Center / support / SUP-90" is visible. The ticket title is "How do I add a new user?". Below the title, a box indicates that "Maria Medelsvensson raised this on Today 16:23" with a "Show details" link. On the right side, the "Status" is "WAITING FOR CUSTOMER" (marked with ④), "Notifications" are "on", the "Request type" is "Technical support", and it is "Shared with" "Maria Medelsvensson" (the "Creator").

The "Activity" section (marked with ①) contains the following:

- A response from "Fredrick Backman" (marked with ②) dated "Today 16:32" with the text: "Hi Maria, You can find instructions on adding a new user in the admin guide. I provide a direct link for you: <https://doc.cantemo.com/latest/AdministrationGuide/users.html#> Basically, in the webui you go to Manage → Users and click the cogwheel icon in the top right corner where you select "Add". Please let me know if you have any further questions about this. Best regards Fred"
- An "Automatic response" (marked with ③) dated "Today 16:32" with the text: "Your request status has changed to Waiting for customer."

At the bottom, there is a text input field (marked with ⑤) with a rich text editor toolbar containing options for font color, bold, italic, text color, list, link, image, and a plus sign. Below the input field is a "Save" button (marked with ⑥).



5 Security

Choose a strong password that is difficult to guess. Avoid things like birth dates, names, and phone numbers. Try to choose something random that is at least 10 characters long and has mixed lowercase and uppercase characters as well as special characters.

Consider using a password manager to better handle your password; that way you can use complex passwords without having to remember them.

Keep your password protected and never share it with others, not even with Codemill Support.

Change your password at least once per year and avoid using similar passwords.

Make sure your computer's operating system has the latest security updates and that you have an up-to-date antivirus protection.