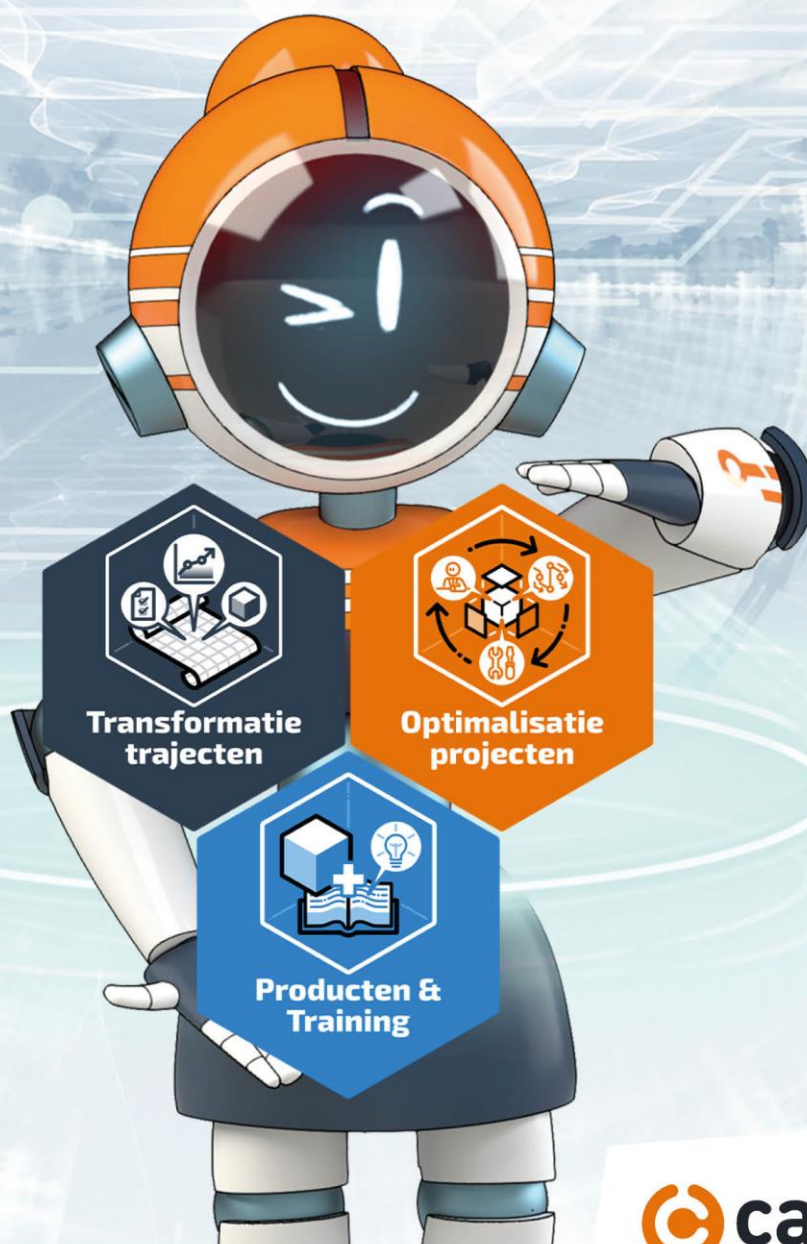


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Auteur: Cadmes Support

Customer Portal manual for customers



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1 Introduction

This is a Cadmes manual for using the Customer Portal. With the customer portal, we are taking steps to ensure optimal support for you as a customer, by giving you insight and a more holistic overview of the cases that you have submitted with us. Furthermore, it gives you the opportunity to upload files directly to cases and to stay in touch with the Cadmes support team about the status of cases. You will be able to see when a case is waiting for your action and hopefully speed up the resolution of your issues.

In this manual you will find instructions that will explain working with the Cadmes Customer Portal (that is based on Salesforce), to ensure optimal case resolution. If you come across anything in this manual that feels outdated, or have some questions that are of importance but not logged? Please contact your Support representative when you come across errors in this documentation.

We hope you enjoy working with our portal!

2 Logging in – What is my username?

The weblink to access the Cadmes Customer Portal is as follows:

<https://cadmes.my.site.com/CadmesSupport/>

You do not automatically have a Customer Portal login. If you want to be able to access the Customer Portal, please address this to your Customer Service or Support representative at Cadmes.

Whenever you have received the first time login link, please proceed to browse to the link in the email and create a password for your unique login.

N.B. It is important to be aware that we use a mail address format as a unique **username**, but not your actual mail address! Please ensure that you use your mail address with the addition of .ccp (example firstname.lastname@cadmes.com.ccp) when logging in. This way you will not run into issues when your organisation uses Salesforce as their own CRM and you will always have a unique username. For all customer portal users, this format with the addition of .ccp is equal so if your colleague does not remember their username, you can help them out as well.

3 What do the fields in the Cadmes Customer Portal mean?

Case Owner – The name of the person that is handling the case in that moment. When it is set to 'Support', the case is known with the team but not assigned to a specific member. This way the entire team can contribute and work on the cases together.

Case status – This field shows what party should take action in the case. This can be customer, Cadmes or a supplier.

Status – The level that a case is handled on.

- 0 no mutual contact had yet. The problem was addressed to Cadmes but there has been no feedback towards the customer yet.
- 1 the case is under review by the Cadmes Support team.
- 2 the case will need more investigation or is assigned to a specialist due to its nature.
- 3 a supplier has been contacted to investigate the case.

Account Phone – This is the company central phone number that is known to Cadmes.

Contact Name – This is the contact name of the customer contact that is linked to the case.

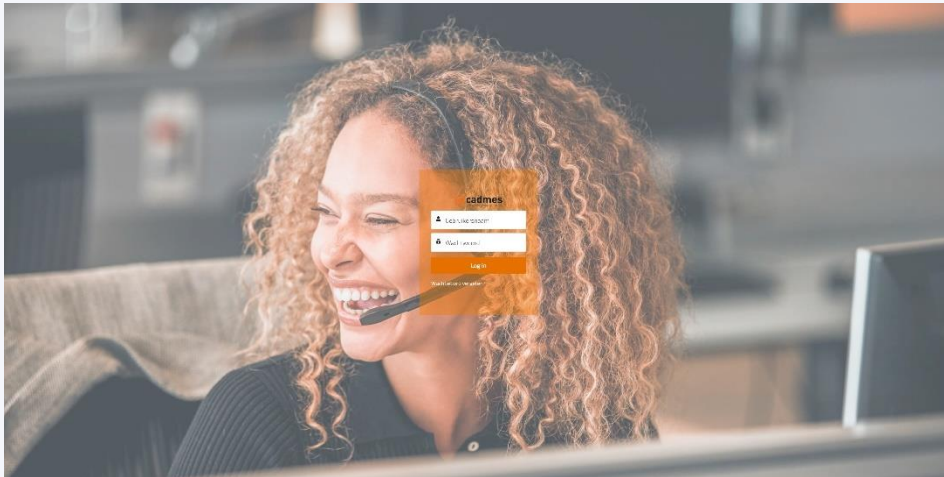
Account Name – This is the firm name of the customer.

Subject – Please insert a short summary of the question here.

Description - Please insert a more detailed summary of the question here. Answer the following questions: What is the version of the software? What product is the question about? What is the expected behaviour? What is the actual behaviour? Is it reproducible in a certain workflow? Is the behaviour visible on the systems of multiple users? What is the impact/priority?

4 What does the interface of the Cadmes Customer Portal look like?

The interface of the customer portal has several different screens. First of all the login page:



After logging in, you will find your homepage. In the picture below the most important buttons are marked:

1. Create case
2. My profile
3. Home
4. Filters
5. Browsing to a case

Welcome to our Customer Portal!

Here you can create new support cases and review your current and closed cases. We aim to make your support experience as flawless as possible and look forward to assisting you.

For license related topics (such as your license agreement or facturation), please contact our Customer Care department. For other non-technical questions you can reach info@cadmes.com, or create a request via the [contact](#) form on our website.

Contact us and get a quick and suitable answer to all of your questions!

1 New Case

2 Text Emma Elm

3 Home

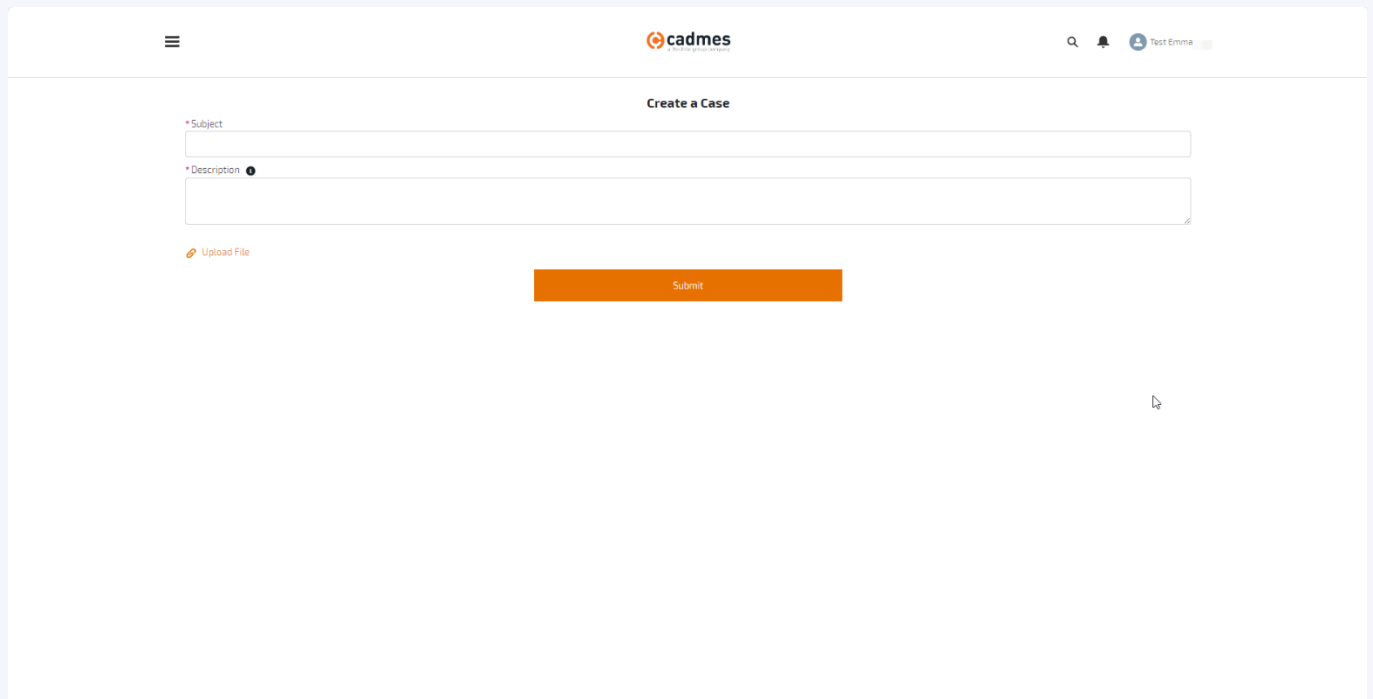
4 Recently Viewed Cases

5 000857

Case Number	Contact Name	Subject	Status	Date/Time Opened	Case Owner Alias
1 000857		TEST	0	21-3-2024 11:28	Support
2 000857			3	14-3-2024 11:15	Support
3 000857			0	1-3-2024 15:30	Support

1. Creating a case

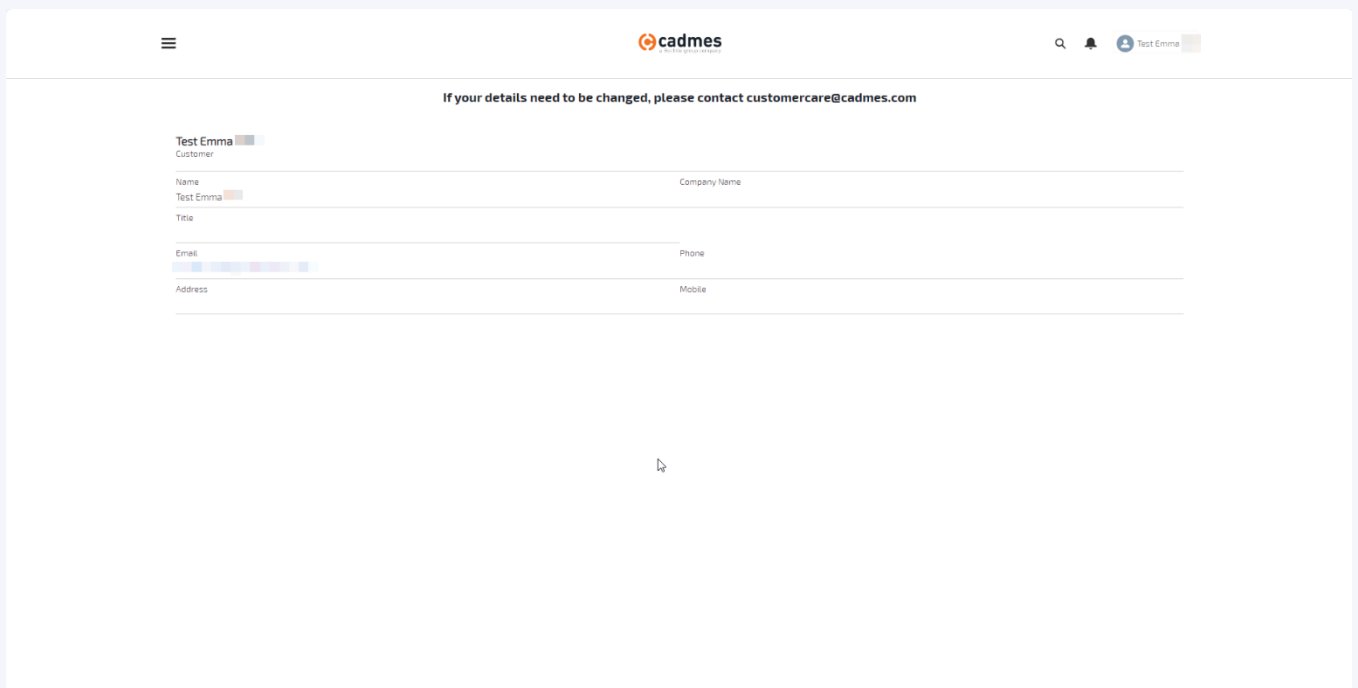
You can submit their issue and related files directly to create a case.



The screenshot shows the 'Create a Case' form in the Cadmes portal. The header includes the Cadmes logo, a search icon, a notification bell, and a user profile for 'Test Emma'. The form itself has a title 'Create a Case' and two required text input fields: 'Subject' and 'Description'. Below these fields is an 'Upload File' button with a file icon. At the bottom of the form is a large orange 'Submit' button.

2. My Profile

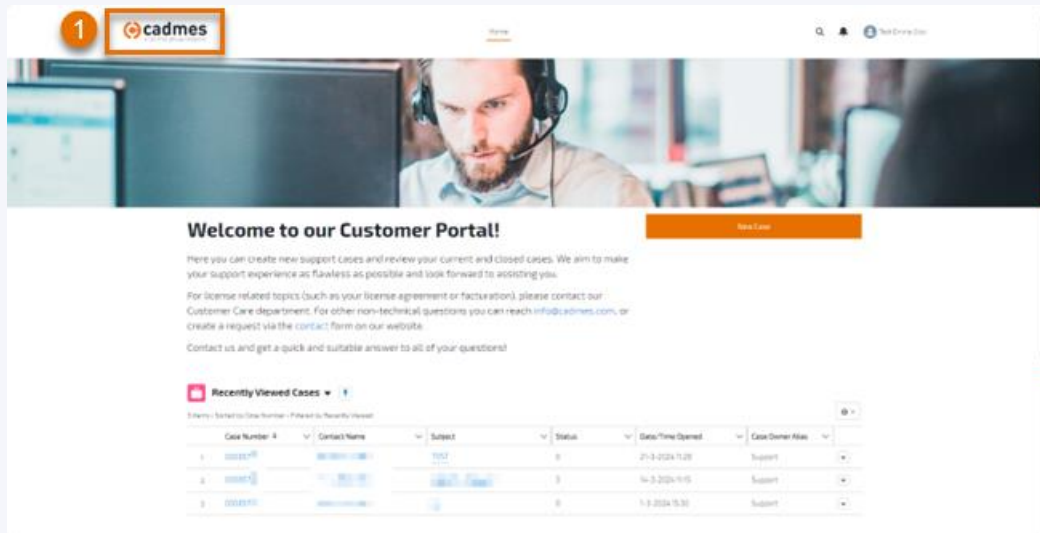
You can check your contact details in My Profile, however you cannot update these fields yourself. If your contact details are incorrect, please contact your Support representative.



The screenshot shows the 'My Profile' page in the Cadmes portal. The header is identical to the previous page. Below the header, a message states: 'If your details need to be changed, please contact customer@cadmes.com'. The profile section shows the user's name 'Test Emma' and title 'Customer'. Below this are several input fields for contact information: 'Name', 'Company Name', 'Title', 'Email', 'Phone', 'Address', and 'Mobile'. The 'Email' field is currently filled with a placeholder text.

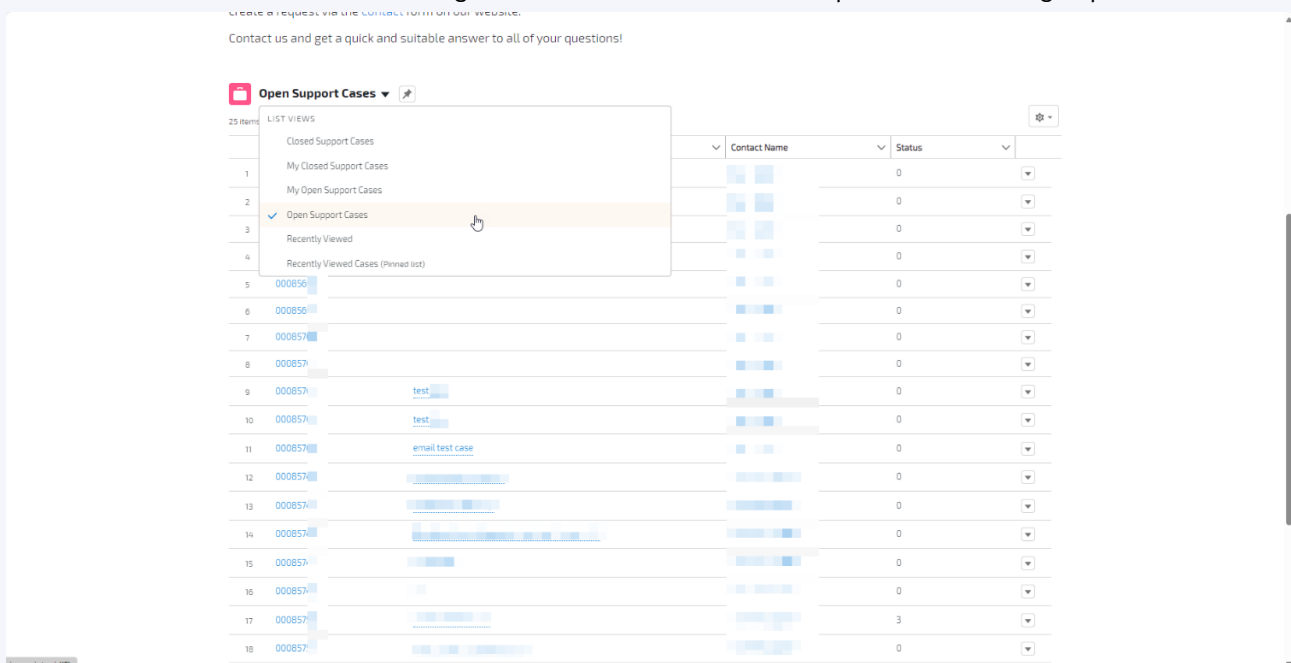
3. Home

When selecting the Cadmes logo at the top of the webpage, you will always be sent back to the home screen.



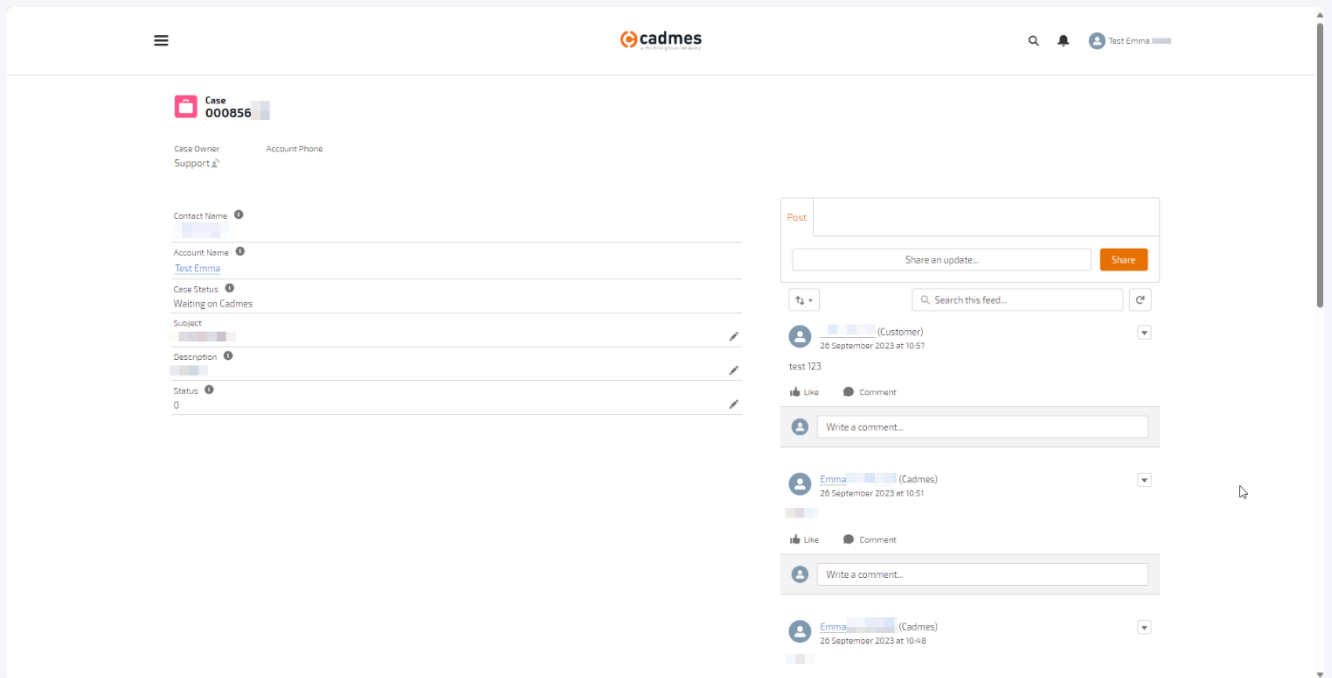
4. Filters

You can select multiple options in the case view. For Open Support Cases you are able to see all of the cases that are currently on status 0,1,2,3 from your company, not just your own. This means you also have an overview of colleagues that have ran into issues to prevent submitting duplicate cases.

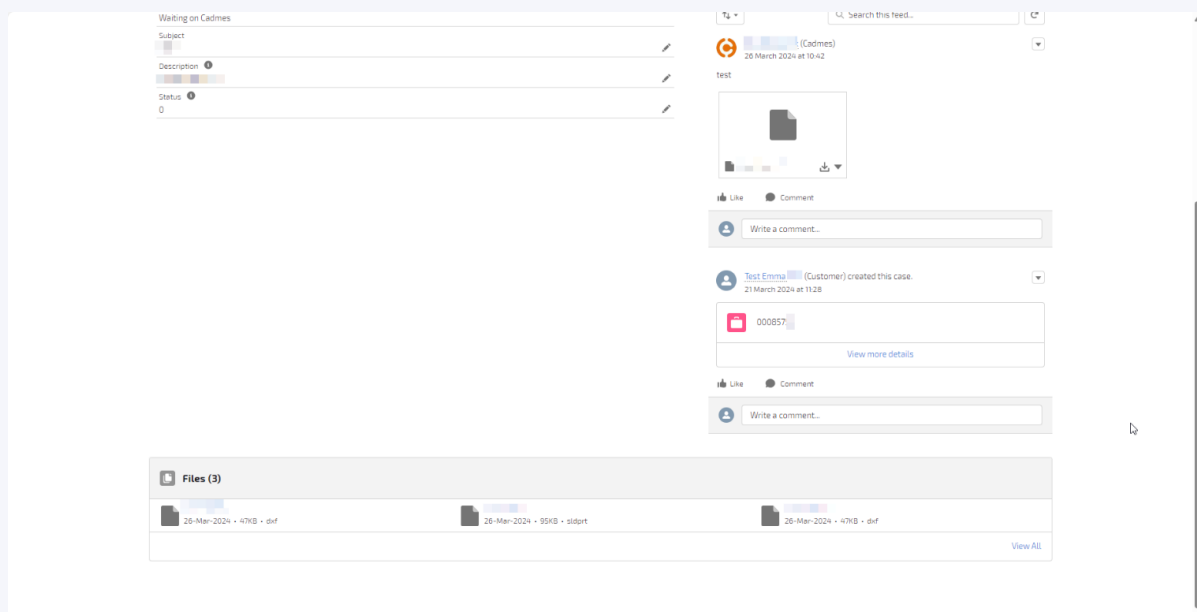


5. Browsing to a case

In a case, you are unable to change any fields (even if you seem to be able to, this is locked with a warning message). You are however able to share posts and tag Cadmes employees in them, and you are able to see the case owner that is working on the case, the status and the action.



In the bottom of the page, you will see the files that are related to the case and will be able to directly download them when we attach files to a post.



5 What to do when you cannot access the Cadmes Customer Portal?

If you have trouble logging in or if you are having issues with your user interface, please contact Support directly through email [support@cadmes.com] or by calling Netherlands: +31 (0)73 645 62 22| Belgium: +32 (0)9 222 23 23

You will still be able to contact support in the way you were used to by sending a direct email to our mail address or by calling us with your technical questions. Nothing needs to change in terms of your support if you do not want to make use of the Cadmes Customer Portal.