User guide customer portal: creating an account and usage

Why submit support requests via the customer portal?

Starting from March 4, 2024, our approach to reporting inquiries and non-critical issues to our helpdesk has been adjusted to improve our accessibility. Users can only report inquiries and non-critical issues via our customer portal. For all critical issues, we remain available by phone. This new approach will ensure more efficient handling of reports and a reduction in phone wait times. Additionally, you will stay fully informed about the status of your report through our customer portal.
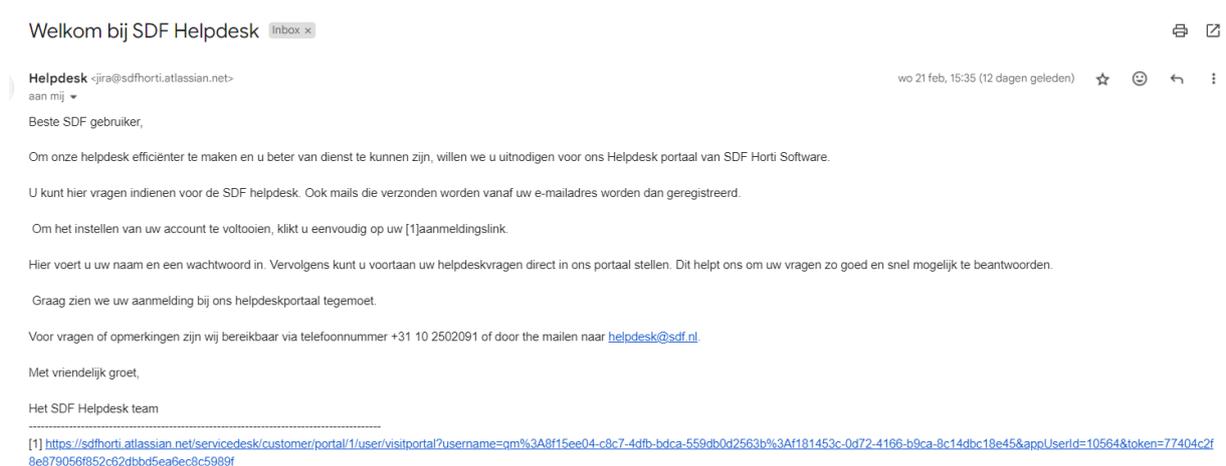
Creating a customer portal account

Step 1: Contact the helpdesk

- Send an email to helpdesk@sdf.nl with your request for an account for the customer portal.
- For critical issues, you can contact the helpdesk by phone at 010-2502091.

Step 2: Click on the registration link in the email

- You will receive an email with a registration link for the customer portal within one business day.
- Click on the link in the email to complete the setup of your account.

Welkom bij SDF Helpdesk Inbox ×

Helpdesk <jira@sdfhorti.atlassian.net>
aan mij

wo 21 feb, 15:35 (12 dagen geleden)

Beste SDF gebruiker,

Om onze helpdesk efficiënter te maken en u beter van dienst te kunnen zijn, willen we u uitnodigen voor ons Helpdesk portaal van SDF Horti Software.

U kunt hier vragen indienen voor de SDF helpdesk. Ook mails die verzonden worden vanaf uw e-mailadres worden dan geregistreerd.

Om het instellen van uw account te voltooien, klikt u eenvoudig op uw [1]aanmeldingslink.

Hier voert u uw naam en een wachtwoord in. Vervolgens kunt u voortaan uw helpdeskvragen direct in ons portaal stellen. Dit helpt ons om uw vragen zo goed en snel mogelijk te beantwoorden.

Graag zien we uw aanmelding bij ons helpdeskportaal tegemoet.

Voor vragen of opmerkingen zijn wij bereikbaar via telefoonnummer +31 10 2502091 of door the mailen naar helpdesk@sdf.nl.

Met vriendelijk groet,

Het SDF Helpdesk team

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[1] https://sdfhorti.atlassian.net/servicedesk/customer/portal/1/user/visitportal?username=qm%3A8f15ee04-c8c7-4dfb-bdca-559db0d2563b%3Af181453c-0d72-4166-b9ca-8c14dbc18e45&appUserId=10564&token=77404c2f8e879056f852c62dbbd5ea6ec8c5989f

Step 3: Enter your name and choose a password

- After entering your name and choosing a password, your account will be activated.
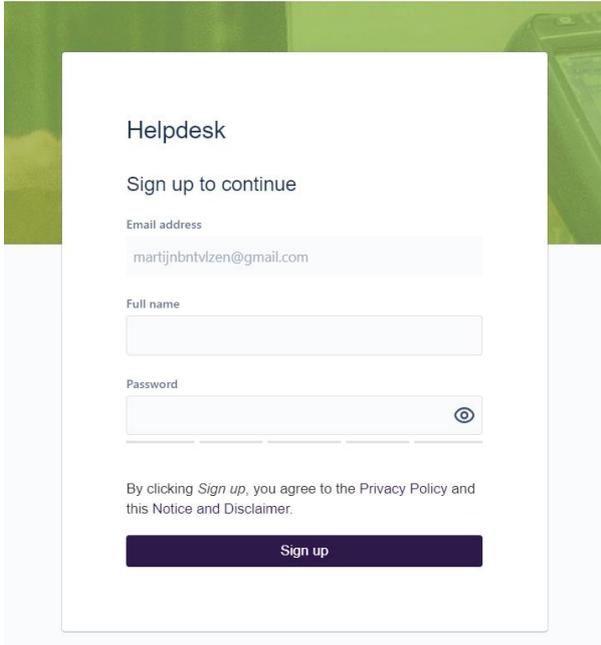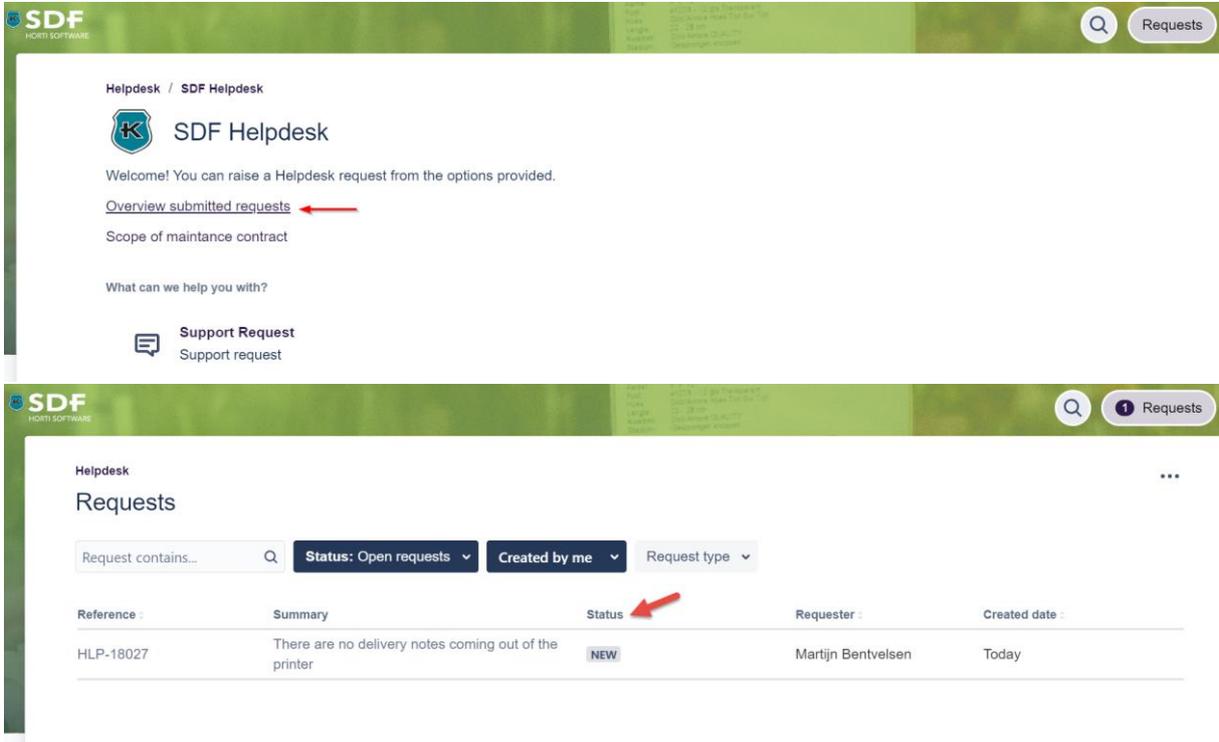

Using the SDF customer portal

Logging In

- You can find the SDF customer portal in the SDF package under Help > Information > Submit support request.
- Log in with your email and password.

Submitting a support request

- After logging in, click on "support request" to submit your request.
- Fill in the fields on the form. Add screenshots to clarify your request. The clearer your request, the more efficiently we can handle it.
- Then click "submit". (* = required fields)
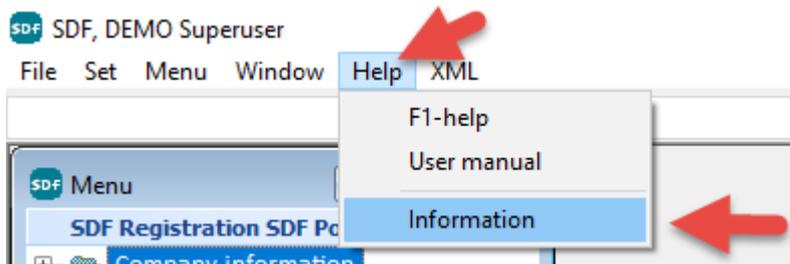
Overview of previously submitted requests

- To view previously submitted requests, click on: **overview of submitted requests.**
- In the overview, you will find your outstanding requests and their status.

Description of possible statuses:

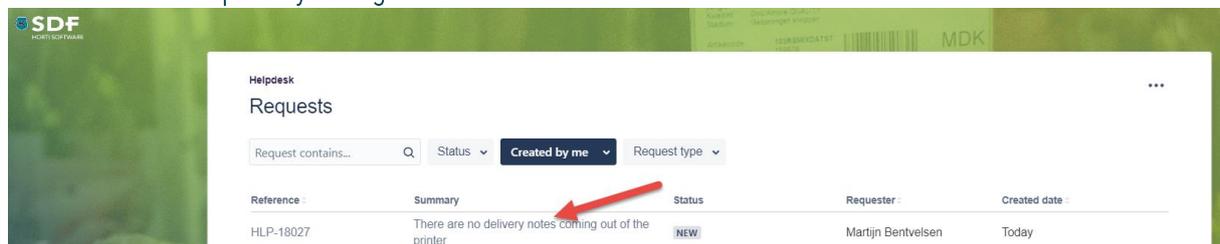| Status	Description
New/open	New request
To Clarify	Request requires clarification
Waiting for customer	Awaiting additional information from the customer
Development backlog	Request has been forwarded to the SDF developers
Ready to go	Ready to be picked up
In progress	Currently being worked on
Review	Awaiting review
Quality assurance	Solution is being tested
Ready for deployment	Ready for delivery/implementation
Done / Gereed	Completed
Canceled	Canceled

Accessing open requests

- To view both completed and open requests, click on "status: open requests". Here, you can also filter requests by their status by selecting the relevant status.
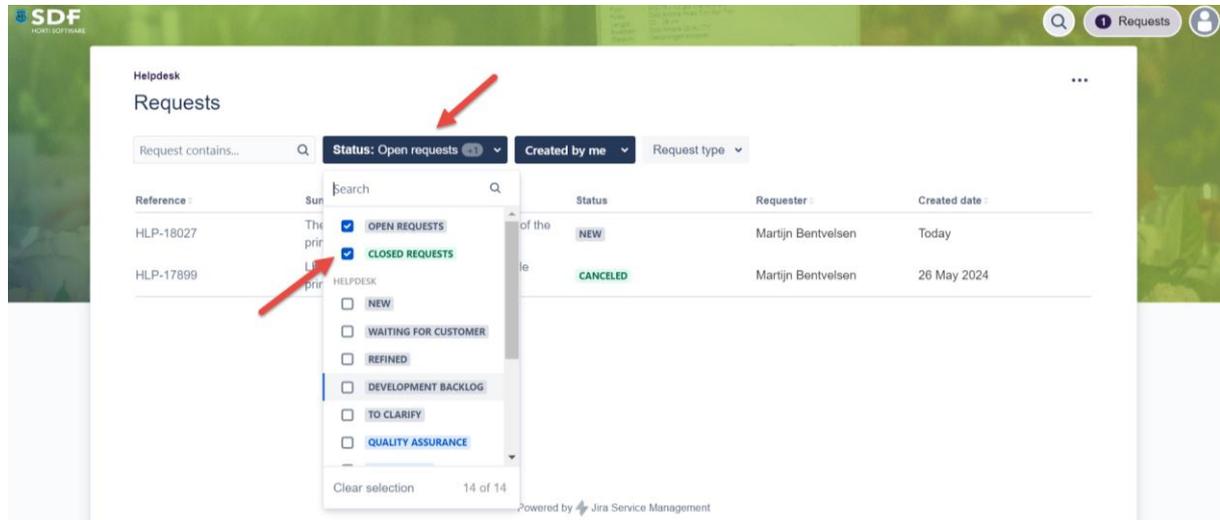
Opening requests and viewing responses

- You can open open requests by simply clicking on the summary of the request. Under the "activity" section, you will find responses from the SDF Helpdesk or a consultant.
- You can respond by adding **a comment.**

Support request

Helpdesk / Helpdesk / HLP-18027

There are no delivery notes coming out of the printer

Martijn Bentvelsen raised this on Today 10:21   Hide details

Description

This is a Test

Description effect

This is a Test

Description when

This is a Test

Customer priority

Bedrijfsvoering gaat door, maar ervaar veel hinder

Contact details

Martijn bentvelsen

Status

NEW

Notifications on

Request type

Support Request

Shared with

Martijn Bentvelsen
Creator

+ Share

Activity

MB   Martijn Bentvelsen Today 10:33
Since when has the problem occurred and which printer is it?
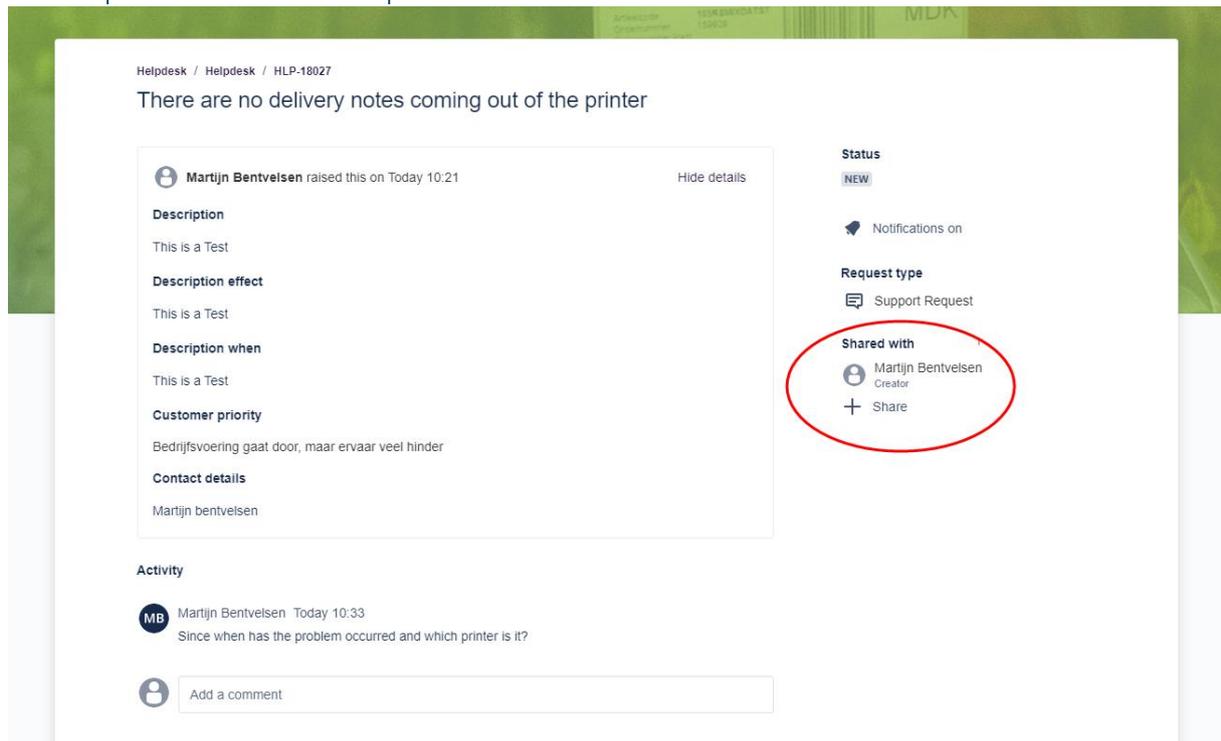
Add a comment

Email notifications

- You will also receive email notifications when a response is posted by SDF. This email will contain the latest response and a link to the corresponding support request.

Complete overview of requests at customer level

- If your organization has one primary person responsible for all requests, add this person's email address to your request.
- The customer portal ensures that this person has a complete overview of all requests.
- All activities and notifications are sent to the requester and not to the central person. However, the central person has access to the request and its associated activities.

Principles:

- Every employee (contact) of the SDF client (company) has access to the customer portal.
- The employee (contact) is linked to the SDF client (company).
- The employee (contact) must have a customer portal login to be able to submit a request.
- The employee (contact) must follow the instructions for creating a request.
- After the employee adds the main responsible person (ICT), this person will gain access to the issue and have an overview by selecting "Show All Requests". The main responsible person can intervene in the issue and monitor the activities.