OneKey
Systems

Customer Portal Manual

A. Incident creation directly from the Odoo system.
B. Incident creation via email.
C. Creation of incidents by phone.

The creation of the incident through the literal A and B, is done directly by the end user.

The creation of the incident through literal C is done through the support contact center staff.

IMPORTANT: We remind you that it is preferable that the user enter their own incidents, so that it remains as a backup of their request, if it is a case of force majeure and the user cannot directly enter their incidents, the incident will be entered through support staff.

<u>A. CREATION OF INCIDENTS DIRECTLY FROM THE ODOO SYSTEM.</u>

HOME: Enter the system using the Firefox, Google Chrome, or Internet Explorer browser, using the following address:

https://grable.onekey.mx

1. **Enter the platform**

The requested data of the image is filled in to be able to enter Odoo.

*   Email: you will put your work email, which will be your user.
*   Password: we will assign you a stable password. If you want, you can change the password by selecting "reset password" there you put the password you want for an account
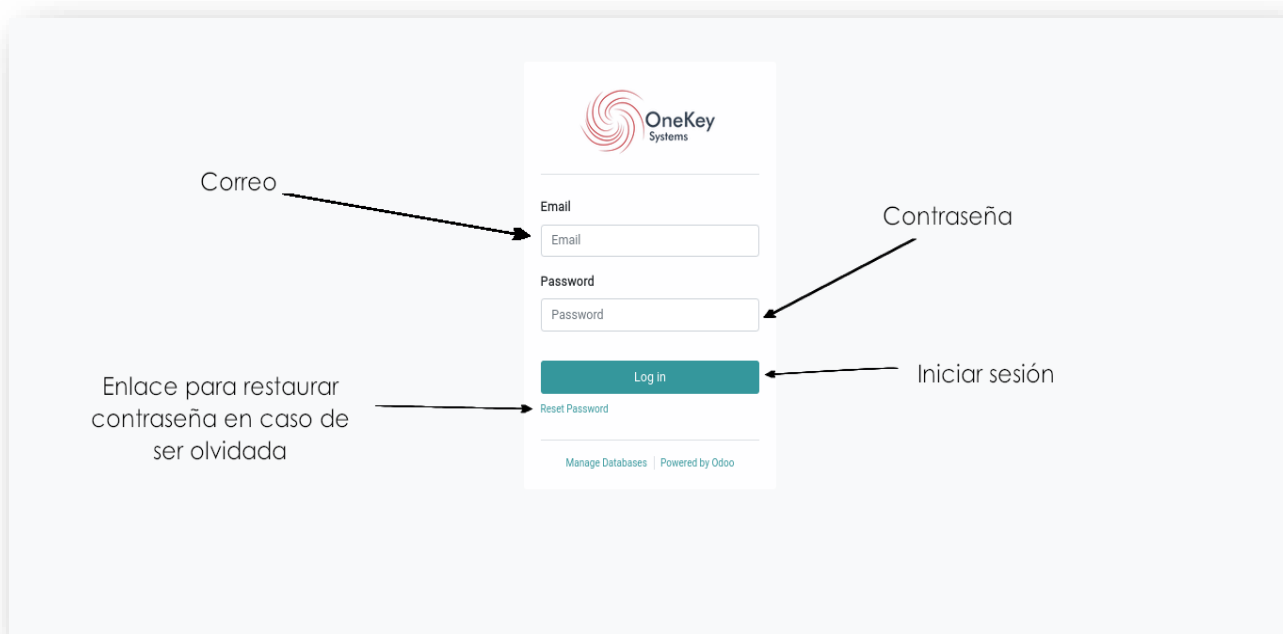
NOTE: If you have forgotten your password, you can follow this step to recover your password.

Introducir correo usado para iniciar sesión y presionar confirmar. Un correo será enviado para ingresar una nueva contraseña

- You will receive an email to reset the password you want.
- You log back in with the password you assigned.

2. Main menu

In the main menu you will find:

- Details: these are general details of the company where you work, in this case customer information.
- Account security.
- Ticket panel
- Documents, in this case they will be the tickets

3. Ticket Panel

In the ticket panel enter the "ticket panel" section

We click on **"create new ticket"**

The following screen will appear where we will begin to fill in the requested information.

They must be:

Subject: Here we must specify a general idea about its incidence.

Location: Client site (you).

Category: You will choose the category that is associated with the incident.

Type of ticket: Request or incident.

Detailed description of the problem that occurred: A more detailed explanation is given about your requirement or incident, so that the technical area can find details of what happened and obtain more information to solve the problem.

We will click "send" just below the screen.

This will save the ticket in the system for tracking.

Once the ticket is registered you will be able to see **"Message and communication history"** that is a personalized chat that you will have with the engineer assigned to solve the activity to talk about the ticket.

4. Ticket Search

- Enter the main menu.
- You click on "tickets"
- The following list will appear.

There you can find the different options for sorting, filtering and the number of tickets, grouping, etc.

So, you can search or find any ticket you have created.

5. Security of your account or authentication.

It is very important to keep your account safe and secure, please help to follow the next steps.

- In the main menu you will find **"account security"**
- Click on **"edit security settings"**
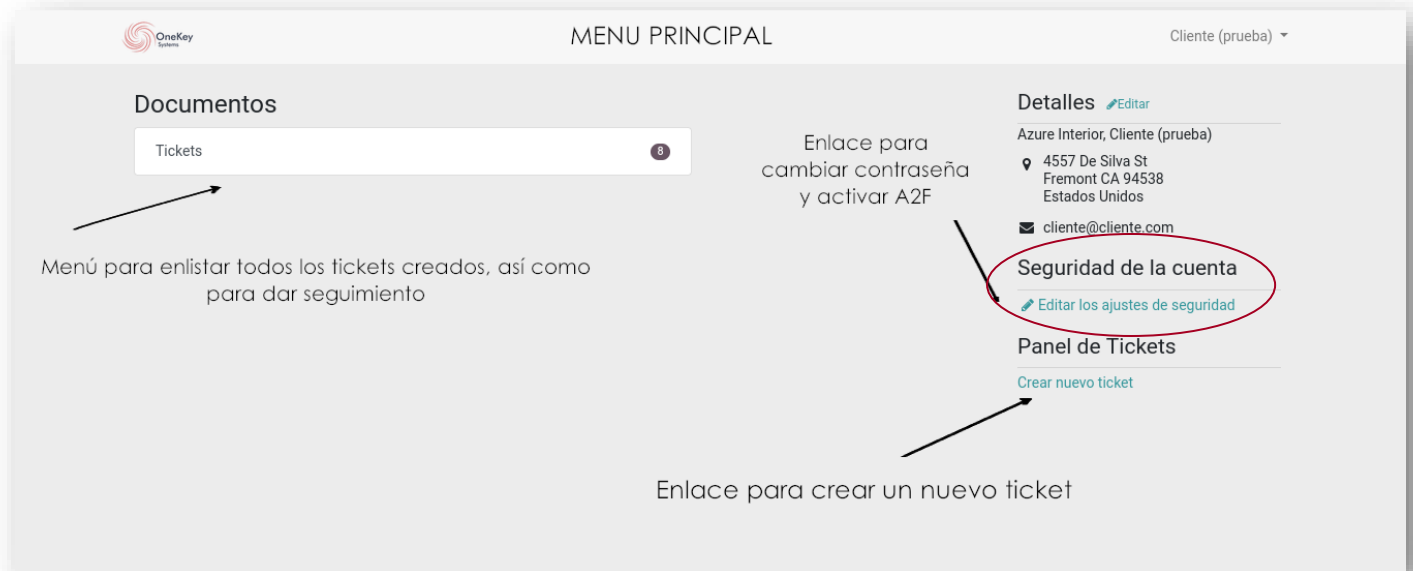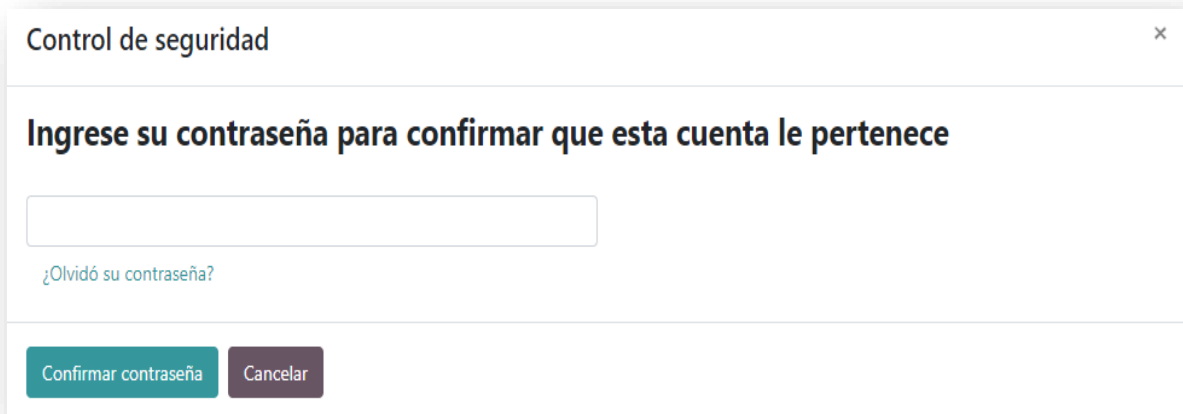
The following screen will open:

- Until the end of the page you will find "Two-step authentication"

We will click on "enable two-step authentication"

- It will open the next tab.

Control de seguridad

Ingrese su contraseña para confirmar que esta cuenta le pertenece

¿Olvidó su contraseña?

Confirmar contraseña   Cancelar

Enter your password

- This new screen will appear

Odoo

Configuración de la aplicación de autenticación

- Instale una aplicación de autenticación en su dispositivo móvil
  Las aplicaciones populares incluyen Authy, Google Authenticator o Microsoft Authenticator.
- Buscar el botón "agregar una cuenta"
- Cuando se le pida hacerlo, escanée el código de barras de abajo

¿No lo puede escanear?

Ingrese su código de 6 dígitos abajo

Código de verificación

6-digit code

Activar   Cancelar

We only continue to carry out the indications that will appear on the page.

Click on the "Activate" option so that your account is already safe and secure.

Then we close the session, and you re-enter your data to enter again, and your session is already registered as a secure session.

Your account will be programmed for safety and protection.

B. CREACIÓN DE INCIDENCIAS DESDE EL CORREO ELECTRONICO

1. When the user needs support, they must send an email to the official support address **soporte@onekey.com.mx**.
2. The email should be as explicit as possible and with the most complete information possible, this so that a faster service can be given.

You must specify:

Subject: The subject should be understood as follows:

The Covey matrix will be used where it will be labeled as follows:

1. VERY URGENT AND IMPORTANT
2. IT IS NOT URGENT, BUT IT IS IMPORTANT
3. IT IS NOT URGENT OR IMPORTANT

The numbering of the brief text will be separated with an underscore, then a summarized idea that covers or characterizes the main need.

Example:

1_ NO INTERNET IN THE SERVICES AREA

Message: The message must contain

- Work área
- Extension
- Requirement detail

3. When you send your email you will receive a confirmation email from our Support agents with a link that will take you to the help desk system (Odoo) that will allow you to check the status of your request. In the same way, any change in your requirement or ticket will be notified to your email.

If you wish to make a change to a requirement already created, you can enter the system as indicated in literal A. and make the respective modifications.

If your problem is that you cannot access your email inbox, you can create your request by entering the system directly as indicated in literal A.

C. CREATION OF INCIDENTS BY PHONE.

To contact you through the Support phone you can do it by call or WhatsApp message to the number.

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