



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.

A. CREATION OF INCIDENTS DIRECTLY FROM THE ODOO SYSTEM.

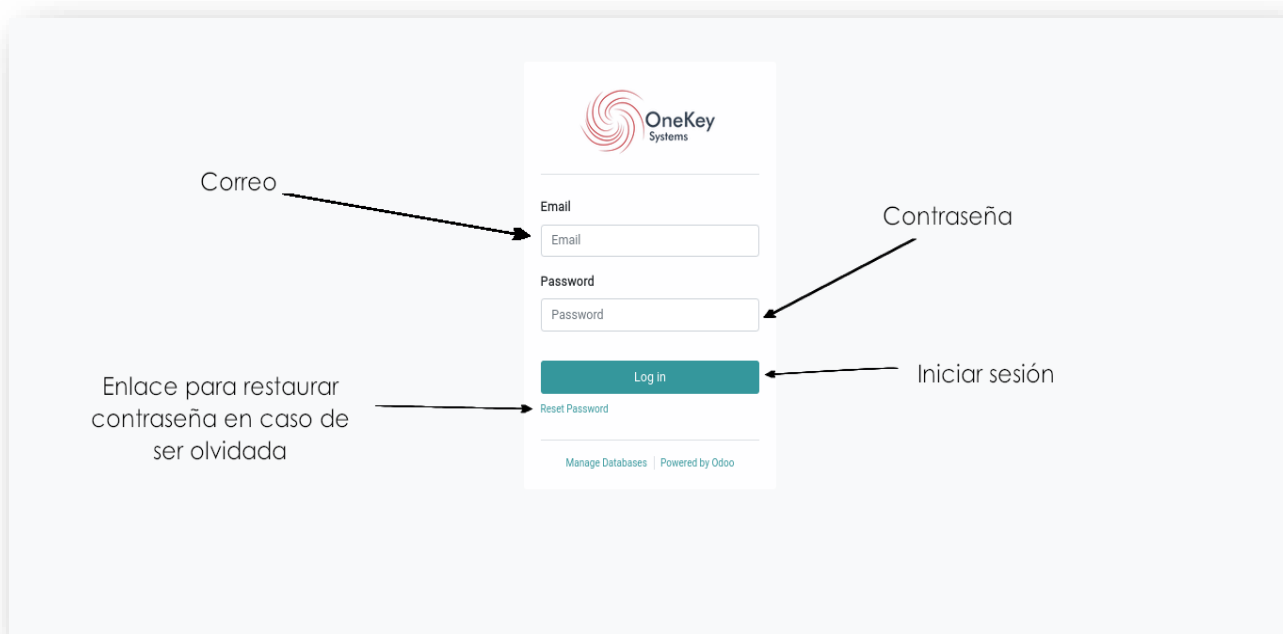
HOME: Enter the system using the Firefox, Google Chrome, or Internet Explorer browser, using the following address:

<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



The screenshot shows the OneKey Systems logo at the top. Below it, the text "Su correo electrónico" is followed by a text input field. A teal button labeled "Confirmar" is positioned below the input field. Underneath the button is a link that says "Volver a inicio de sesión". At the bottom of the form, there are two small links: "Gestionar bases de datos" and "Con tecnología de Odoo". An arrow from the text on the left points to the input field.

- 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”**

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The screenshot shows the 'MENU PRINCIPAL' interface. On the left, under 'Documentos', there is a 'Tickets' button with a notification badge showing '8'. An arrow points to this button with the text: 'Menú para enlistar todos los tickets creados, así como para dar seguimiento'. On the right, under 'Detalles', there is a link 'Enlace para cambiar contraseña y activar A2F'. Below that, the 'Seguridad de la cuenta' section contains a link 'Editar los ajustes de seguridad' which is circled in red. Below the security section is the 'Panel de Tickets' section, which contains a link 'Crear nuevo ticket'. An arrow points to this link with the text: 'Enlace para crear un nuevo ticket'. The top right corner shows the user profile 'Cliente (prueba)'.

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

The screenshot shows a web form titled "Crear un nuevo Ticket" from OneKey Systems. The form is for creating a new ticket and includes the following fields and annotations:

- Asunto:** A text input field with the placeholder "Trata de ser breve en el asunto de tu problemática". An arrow points to it from the label "Asunto".
- Localización:** A dropdown menu with "Nuevo Vallarta" selected. An arrow points to it from the label "Lugar donde ocurrió la incidenciaa".
- Categoría:** An empty text input field. An arrow points to it from the label "Categoría".
- Tipo:** A dropdown menu with "Pregunta" selected. An arrow points to it from the label "Tipo de ticket".
- Descripción:** A large text area with the placeholder "Escribe cualquier información que creas es importante para describir tu problemática, siéntete libre de escribir la información que sea indispensable". An arrow points to it from the label "Descripción detallada del problema ocurrido".
- Enviar:** A green button at the bottom right. An arrow points to it from the label "Botón para registrar ticket".

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.

Cliente (prueba) -

Asunto

Crear un nuevo Ticket

Lamentamos los inconvenientes, nuestro equipo resolverá esta incidencia lo más pronto posible

Por favor llena los siguientes campos

Asunto

Localización

Categoría

Tipo

Descripción

Enviar

Botón para registrar ticket

Lugar donde ocurrió la incidencia

Descripción detallada del problema ocurrido

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.

OneKey Systems

MENU DE TICKET CREADO

Cliente (prueba) -

Tickets / #195

Teléfono dañado (#195) Estado: Nuevo

Reportado en 19/04/2022

Reportado por Contacto Bright Machines S. de R.L. de C.V., Cliente (prueba)
miguel.cabrera@brightmachine.com

Descripción Un teléfono fue dañado tras ocurrir un pico de voltaje. Solito una nueva instalación del equipo lo más pronto posible.

Historial de mensajes y comunicación

No hay comentarios por ahora

Chat para dar seguimiento y comunicarse con el equipo de soporte así como añadir archivos adjuntos del problema.

Escribir un mensaje...

Enviar

4. Ticket Search

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

Cliente (prueba) -

Ordenar por: Más reciente - Filtrar por: Todos - Agrupar por: Etapa - Search (in Content) Q

Ref.	Tickets in stage: Nuevo
#195	Teléfono dañado
#194	Conmutador fuera de línea

Lista de tickets a mostrar según criterio de búsqueda. Se muestran todos de forma predeterminada

Barra de búsqueda para filtrar y ordenar los tickets registrados

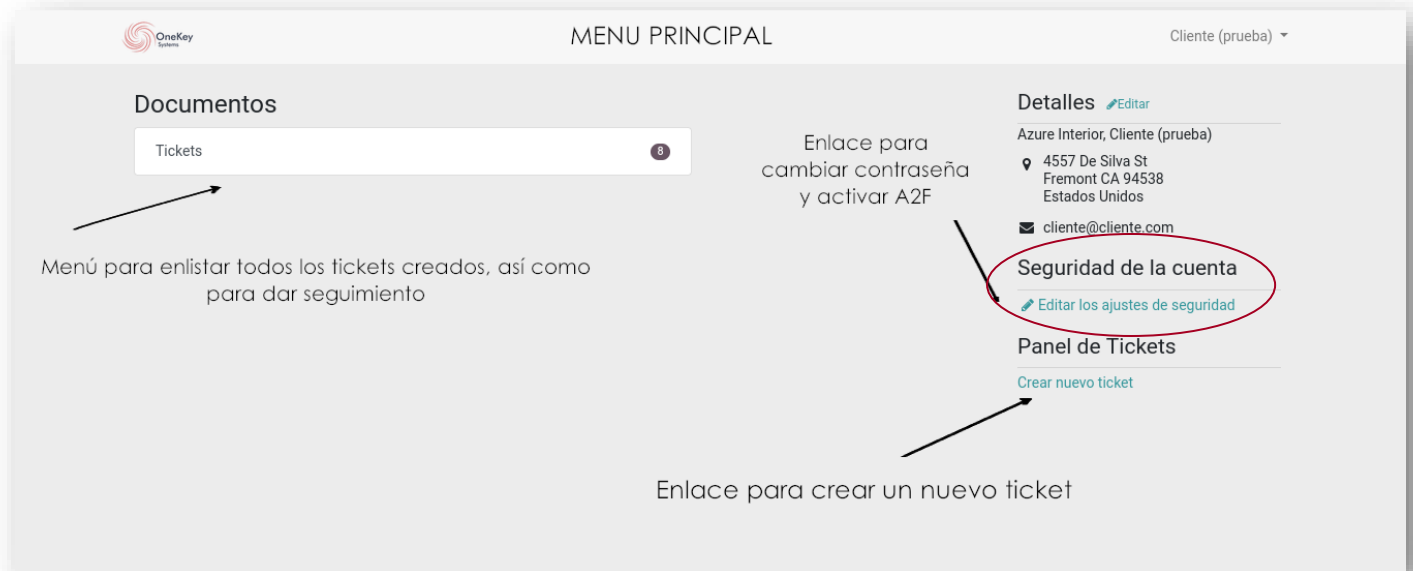
There you can find the different options for sorting, filtering and the number of tickets, grouping, etc.

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**”



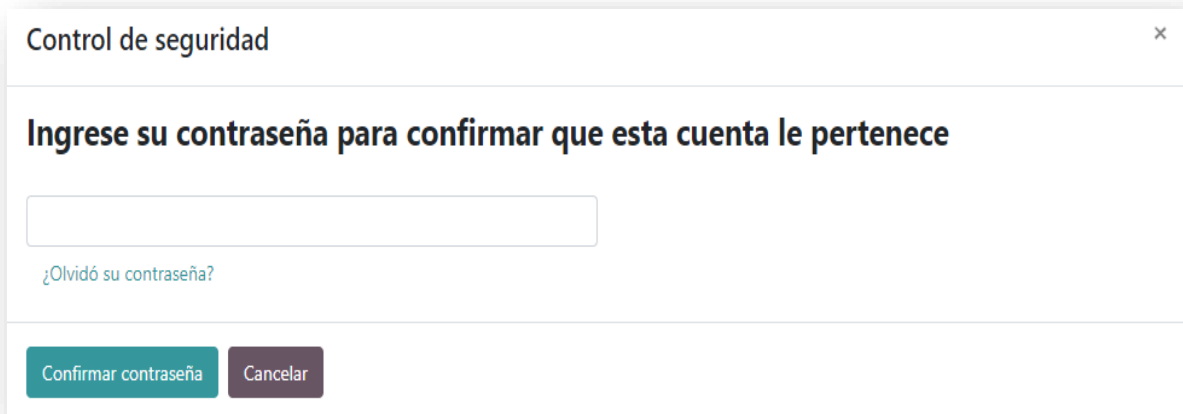
The following screen will open:

- 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, escanee el código de barras de abajo



¿No lo puede escanear?

Ingrese su código de 6 dígitos abajo

Código de verificación

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 (Odo) 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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