



OCT 2023
VERSION 1.1

New Alegeus Support Portal Guide



Amendment Log:

Version	Date	Changes
1.0	08/30/2023	Initial version

Table of Contents

- Alegeus Support Portal 1**

- Signing In..... 1**
 - Login Assistance..... 1**
 - Activation Email Sample 3
 - Logging into the Portal 4**
 - Reset password..... 4**
 - Portal Admin Contact Widget..... 5**
 - Terminating Contacts..... 6

- Using the portal..... 7**
 - Profile 7**
 - Home 7**
 - Search 8
 - Tickets 9**
 - Submitting a ticket 10**
 - Additional ticket submission details 12
 - Canned Forms 13**
 - Updating a ticket 14**
 - Changing Ticket Details..... 15**
 - Who can see a ticket?..... 16**
 - Contacts..... 16
 - Carbon Copy (cc)..... 16
 - Blind Carbon Copy (bcc)..... 16
 - Organizational Access Contacts..... 16
 - Solutions 17**
 - Forums 17**

Alegeus Support Portal

The Alegeus Support Portal offers you easy access to track work, gauge performance and ensure accountability. This self-service tool gives you an up-to-date status into the resolution of any issues and allows you to provide immediate feedback to help maintain an excellent quality of service.

On the portal, you will be able to:

- Open new tickets
- View your open/closed tickets
- Export ticket reports
- Post screen shots and attach documents
- Stay up to date on important announcements/outages



For urgent system issues, we recommend calling technical support to ensure the most efficient and immediate action: 888.852.9131.

Signing In

Log in to your account

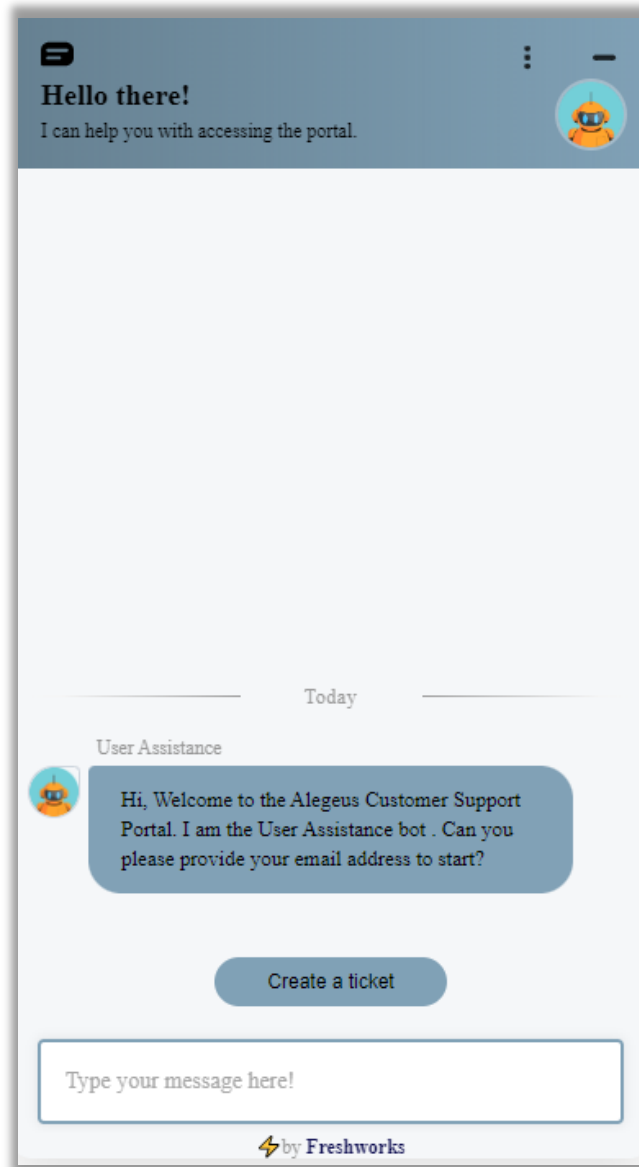
- [Sign into: Alegeus Customer Support Portal \(freshdesk.com\)](https://alegeus.freshdesk.com)
- Link located within WCA under My Account > Support Portal

Login Assistance

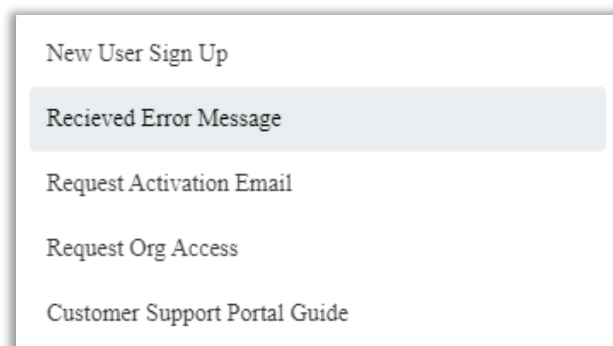
To create your account in the Support Portal if you have never used or interacted with our ticketing system, visit <https://alegeus.freshdesk.com/support/login>. In the bottom right of the page there is a conversation bubble, which is the new User Assistance bot.



This self-help bot can now assist in any Support Portal user request to make the process seamless.



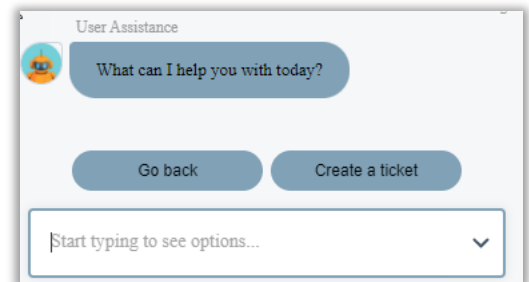
The first step is to provide your email address, then you have 5 options to choose from in the drop-down menu.



1. **New User Sign Up** – this will take you through all the steps for signing up in the customer support portal and sending you the activation email.
 - a. *Note:* that the process will validate that your domain email address is assigned to a company that is existing in our system. If it is a new one that does not currently exist, a ticket will be created for the admin to address.
2. **Received Error Message** – If you are having problems while trying to log in. This will now walk you through the different possibilities and help you resolve them or enter a ticket for you directly to the admin for assistance.
3. **Request Activation Email** – If you know you already have an account, but you never got the activation email or your activation email expired, this option will take you through the steps for triggering a new one.
4. **Request Org Access** – If you already have an account and are not sure how to request org access, you can use this quick option for requesting a ticket. You can always enter it directly in the portal by submitting a ticket.
5. **Customer Support Portal Guide** – This option will just show you where the guide materials are located either in the portal or through the external Alegeus website link.

During any step or question, you can click the buttons:

- **Create a ticket** – if the self-help steps are not getting you what you need.
- **Go back** – to the last step to correct what you typed or selected.

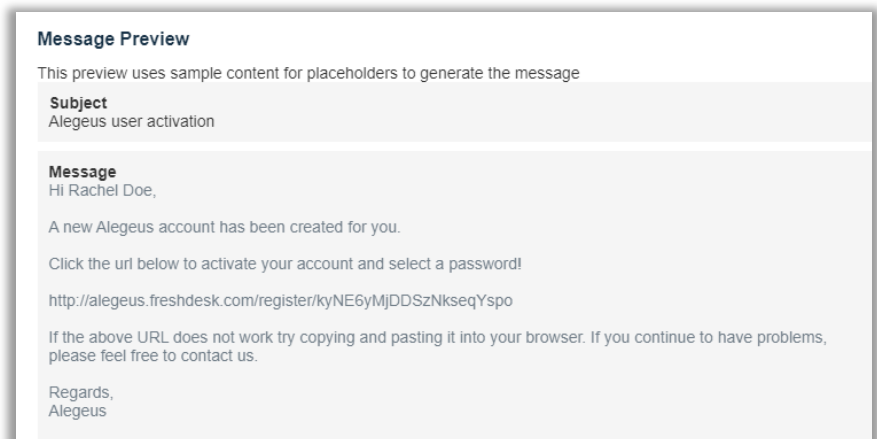


Activation Email Sample

An email will be sent to you to complete registration. Below is a sample of what the message will look like.

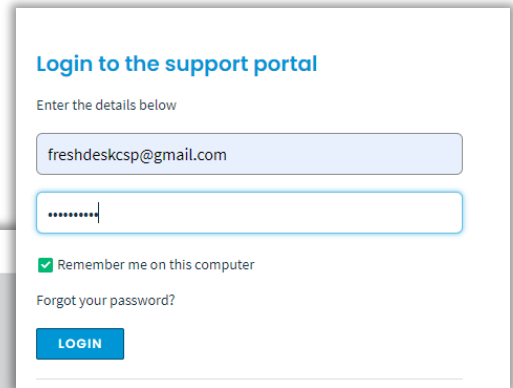
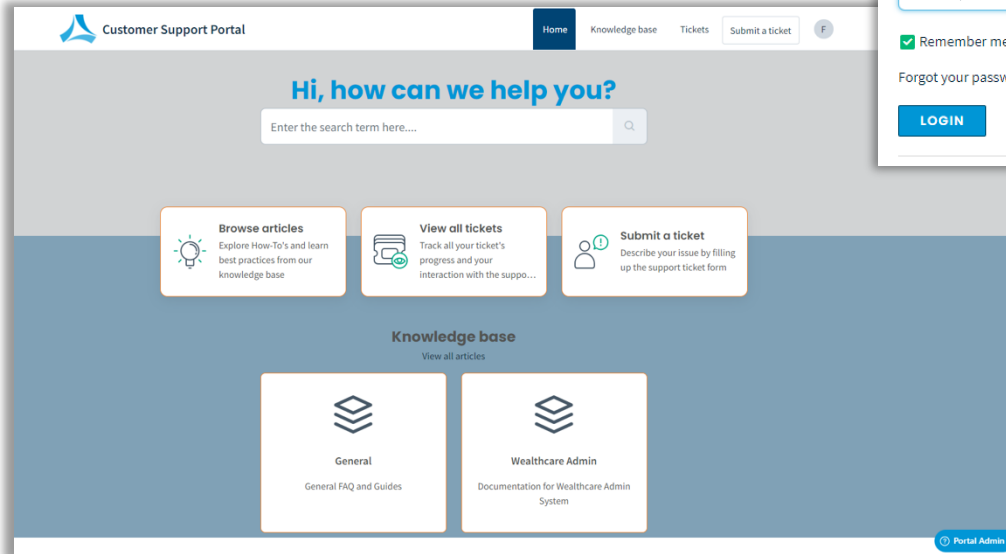
Once you click on the link and complete registration, you will be able to log into the new Alegeus Customer Support Portal.

If you have any other issues or questions, please reach out to an internal admin at your company or your Service Delivery Advisor for assistance.



Logging into the Portal

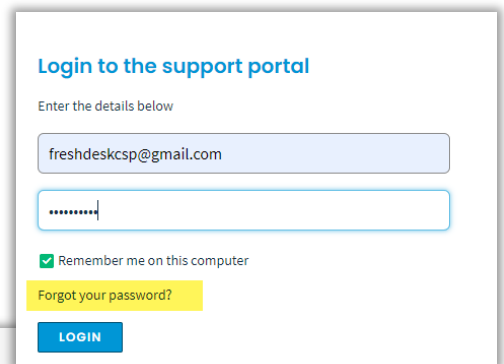
Type in your email and password, then click 'Login.' You will be taken to the landing page of the Customer Support Portal.



Reset password

Click the 'Forgot my password' link on the login page, then type in your email address. An email will be sent to you with a link to reset your password.

Below is a sample of what the message will look like.



Subject
Alegeus password reset instructions

Message
Hey Rachel Doe,

A request to change your password has been made.

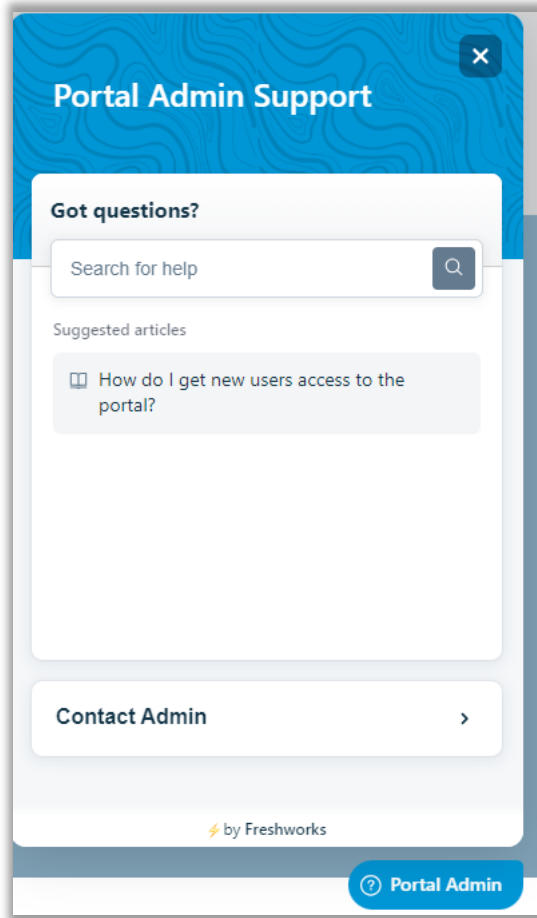
To reset your password, click on the link below:
[Click here to reset the password.](#)

If the above URL does not work, try copying and pasting it into your browser. Please feel free to contact us, if you continue to face any problems.

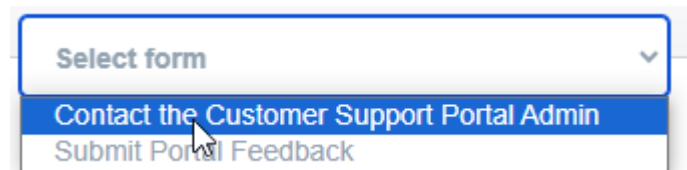
Regards,
Alegeus

Portal Admin Contact Widget

The new way to outreach to the Customer Support Portal admin is by clicking on the link in the bottom right corner of the landing page. It will open a widget that will allow you to directly outreach the portal admin.



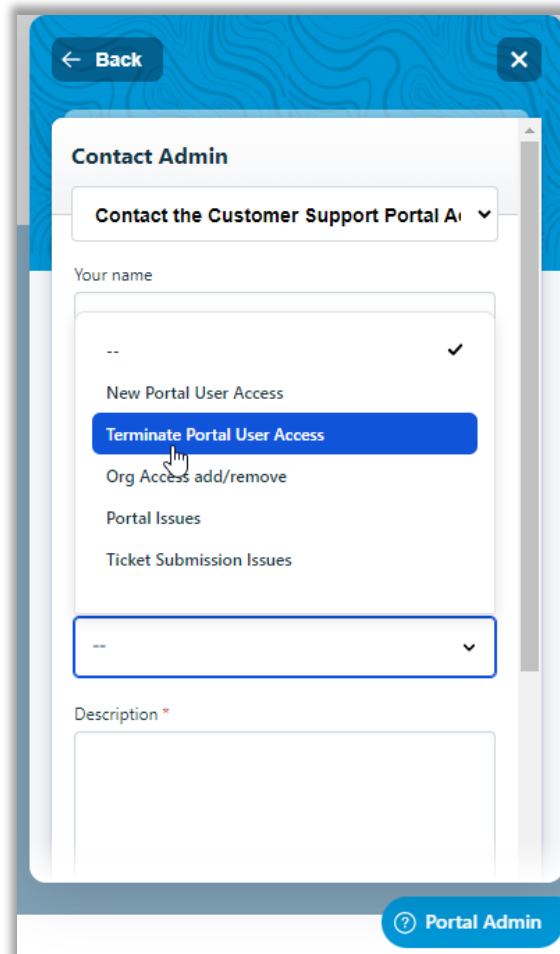
When you click Contact Admin the following drop down will bring up two different types of forms



1. Contact the Customer Support Portal Admin
 - a. The following can be completed in this form:
 - New user
 - Terminate user
 - Org access add/remove
 - Portal Issues
 - Ticket Submission Issues
2. Submit Portal Feedback
 - a. This form is available to provide any feedback on the customer support portal experience or suggestions for changes or additions to the portal.

Terminating Contacts

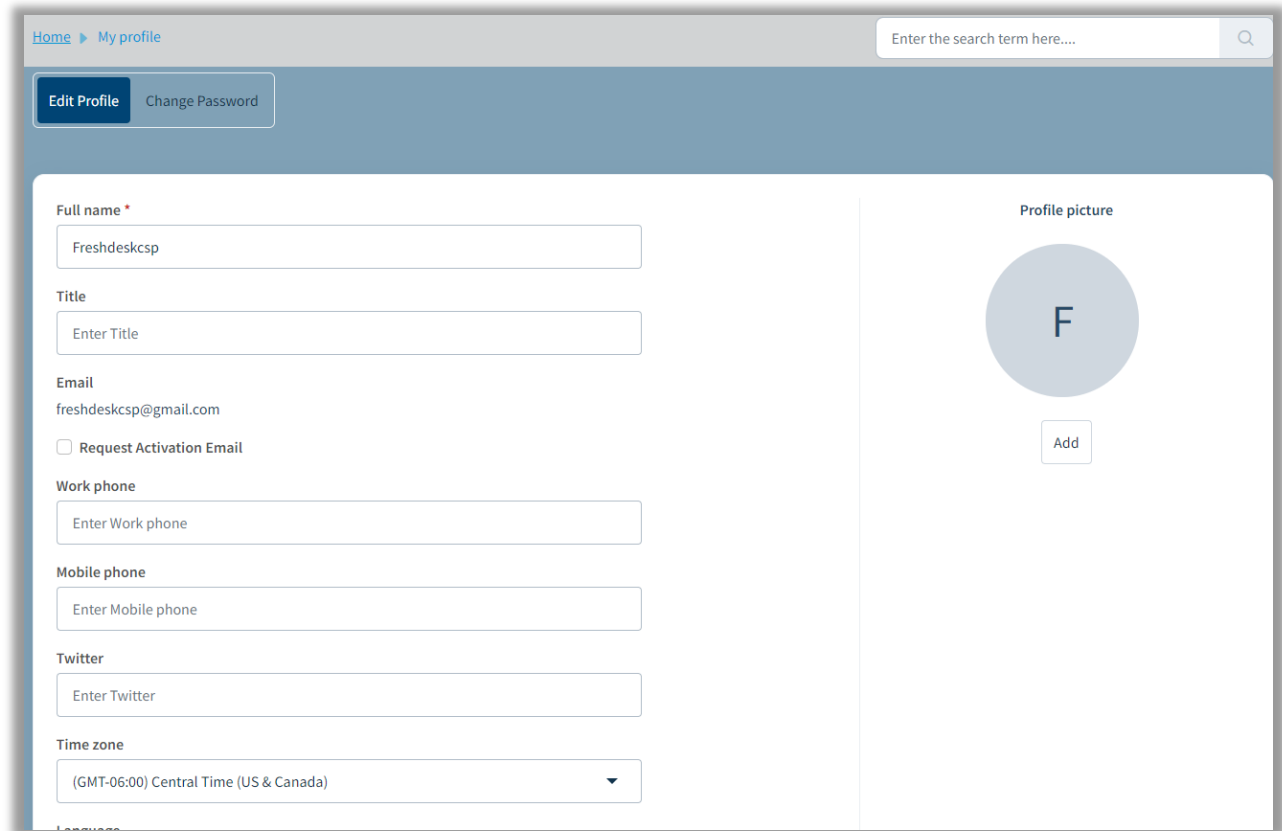
When someone leaves or needs to be terminated from the company access, a request will need to be submitted to remove that access in the Customer Support Portal. You can do this easily by submitting a ticket, selecting the following options, and detailing the request in the description.



Using the portal

Profile

Click on 'Edit Profile' in the upper right-hand corner of the screen. From here you may view your profile or sign out. Under 'Profile' you can update your password, name, title, phone numbers and time zone.



Home ▶ My profile

Enter the search term here....

Edit Profile Change Password

Full name *

Freshdeskcp

Title

Enter Title

Email

freshdeskcp@gmail.com

Request Activation Email

Work phone

Enter Work phone

Mobile phone

Enter Mobile phone

Twitter

Enter Twitter

Time zone

(GMT-06:00) Central Time (US & Canada)

Profile picture

F

Add

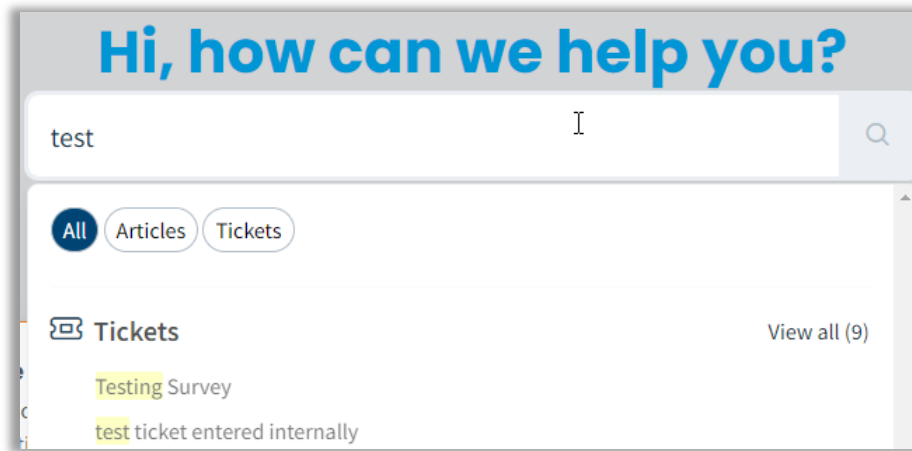
Home

Right from the home screen, you can click on or navigate to any of the below items:

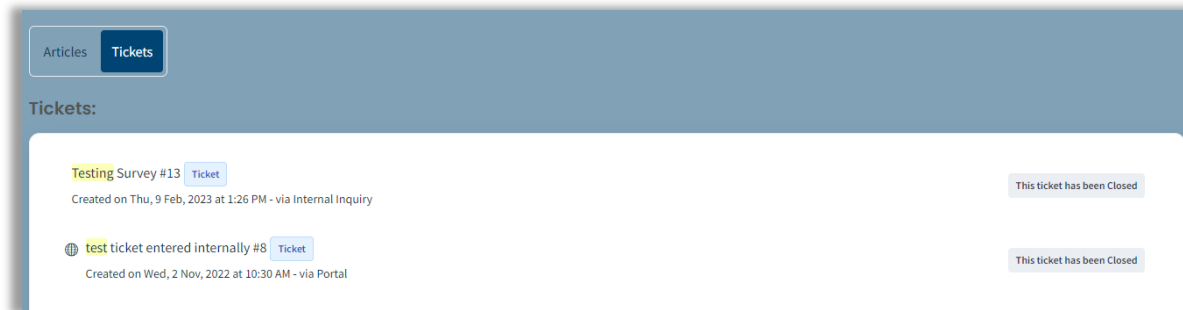
- Search
- Submit a Ticket
- View all tickets
- Browse articles/Knowledge base
- See Forums

Search

You can start a search and it will show you all the matching terms within all sections of the Customer Support Portal. You can also select the sections like articles and tickets to see what displays for those options.



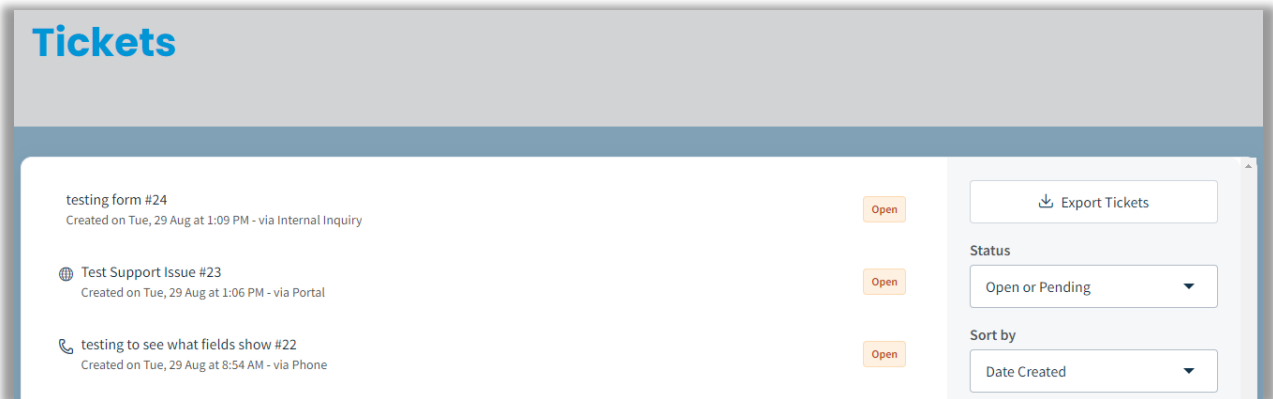
You can also click View all and it will bring up all the tickets that match our search terms. Note: the ticket number is now displayed in the view all tickets section.



Tickets

Click 'Tickets' on the landing page to access the ticket dashboard.

- Here you customize the view by status and sort by.
 - **Status:** Open/Pending, Resolved/Closed or All
 - **Sort by:** Date Created, Last Date Modified, Priority, Status, Ascending or Descending
- If you have manager permissions, you can also view the tickets for your organization.
- You can sort and export your list to a CSV or Excel file



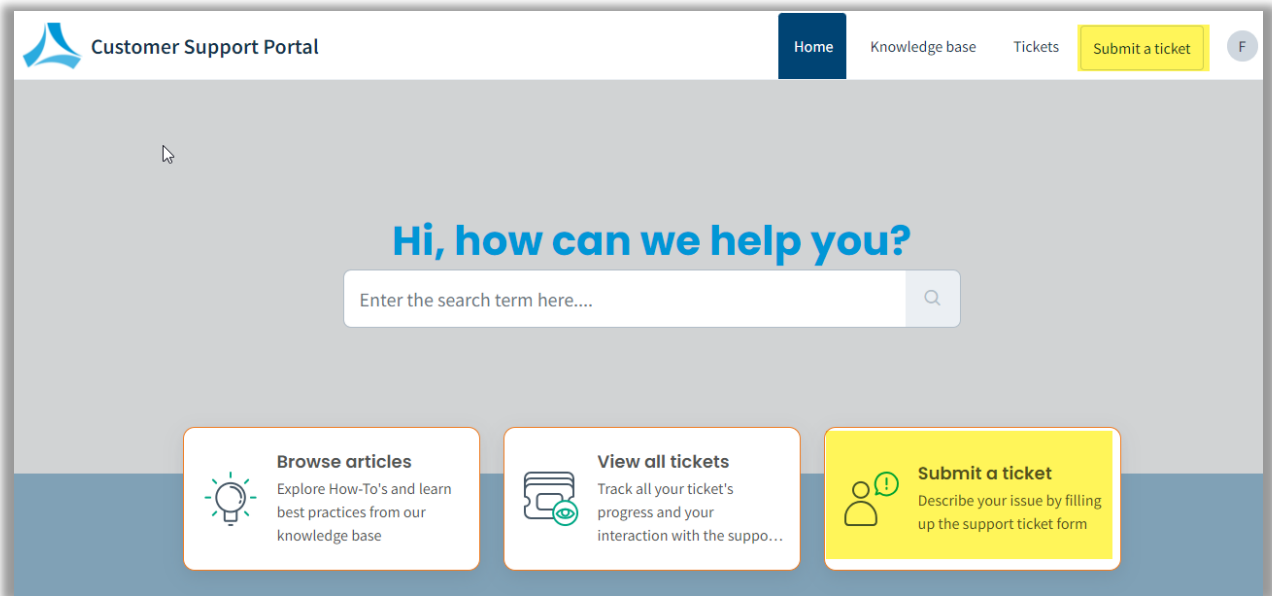
The screenshot shows the 'Tickets' dashboard interface. It features a list of tickets on the left and control options on the right. The tickets listed are:

- testing form #24
Created on Tue, 29 Aug at 1:09 PM - via Internal Inquiry
- Test Support Issue #23
Created on Tue, 29 Aug at 1:06 PM - via Portal
- testing to see what fields show #22
Created on Tue, 29 Aug at 8:54 AM - via Phone

Each ticket has an orange 'Open' button to its right. On the right side of the dashboard, there is an 'Export Tickets' button with a download icon. Below it are two dropdown menus: 'Status' (currently set to 'Open or Pending') and 'Sort by' (currently set to 'Date Created').

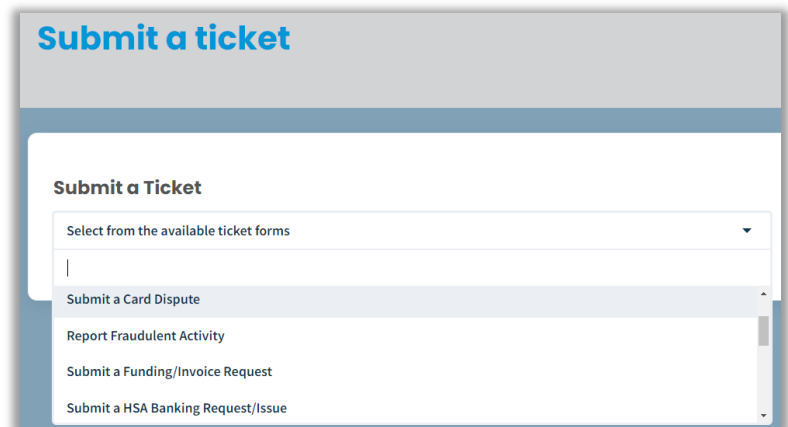
Submitting a ticket

1. To submit a ticket, select 'Submit a Ticket' from the home page or from the ticket page.



2. Select from the available ticket forms (forms are designed for different scenarios and to streamline processes)

- Submit a Support Issue
- Submit a Support Request
- Submit a Card Dispute
- Report Fraudulent Activity
- Submit a Funding/Invoice Request
- Submit an HSA Banking Request/Issue
- Submit a Non-HSA Banking Request/Issue
- Submit a COBRA Banking Request/Issue
- Submit a Request to Card Solutions
- Question on How to or Functionality
- Do you need to submit a request/issue to your Member Solutions team?
- Do you need to submit a request/issue for Employer Support Services?
- User Acceptance Testing
- Submit an Issue related to your Implementation
- Submit a Request for Training

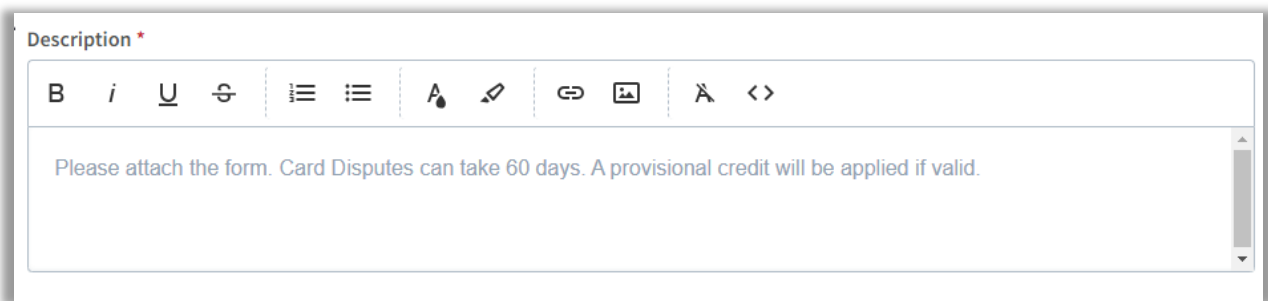


Each form will have a specific set of requirements to submit that request. The form has been designed to be specific to that request type and will reduce the need for specific information or unnecessary selections due to a global form. The selections have been streamlined within each form for ease in submitting that request type.

Note: Due to the different types of departments or areas of focus that we cover within our business that you can interact with, we have tried to make this easier for your teams to submit a request or issue. If at any point you find that something is not helpful or missing, please use the portal admin widget and submit a portal feedback ticket.

3. Basic information that all forms will require:

- a. **Requester** is the auto populated with the person submitting the request in the portal.
- b. **Subject** field should contain relevant information briefly describing the issue or request.
- c. **Description.** Include detailed pertinent information describing the nature of the request. Some ticket types may produce a template to complete.
 - Include in your description the impact on you as the admin, your employer(s) and/or participant(s).



d. **Screen recording and attachments.**

- **Screenshots and recordings are highly encouraged. They will allow our teams to see your experience and support more effectively.**
- To add attachments, just click on the 'Attachment' button, navigate to the required file and upload it into the ticket. The maximum file attachment size is 20MB per file.

4. Additional fields can be added as part of each form, some may be required (*), and others informational:

- Examples
 - Checkboxes
 - Check Inquiry Details Provided
 - Drop-down options
 - HSA Banking Request/Issue
 - Single Line Text boxes
 - Member ID
 - Multiple line Text boxes
 - Error message details

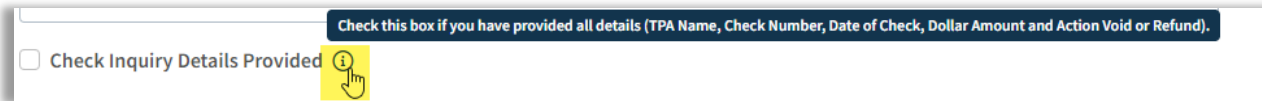
5. Once you have completed the ticket, click 'Submit' and the ticket will be entered into the system.

- a. You will also receive a confirmation email regarding your ticket submission. The email subject will be the ticket number and name.

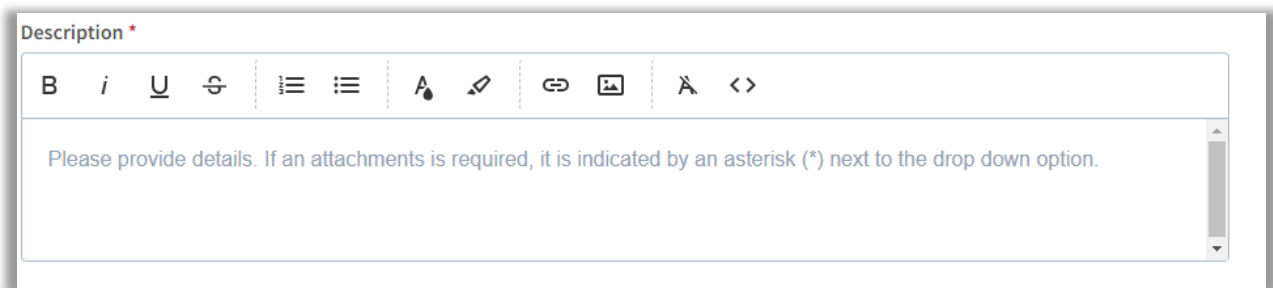
Additional ticket submission details

There are some additional features that are not available in the ticket submission form that will help during your submission.

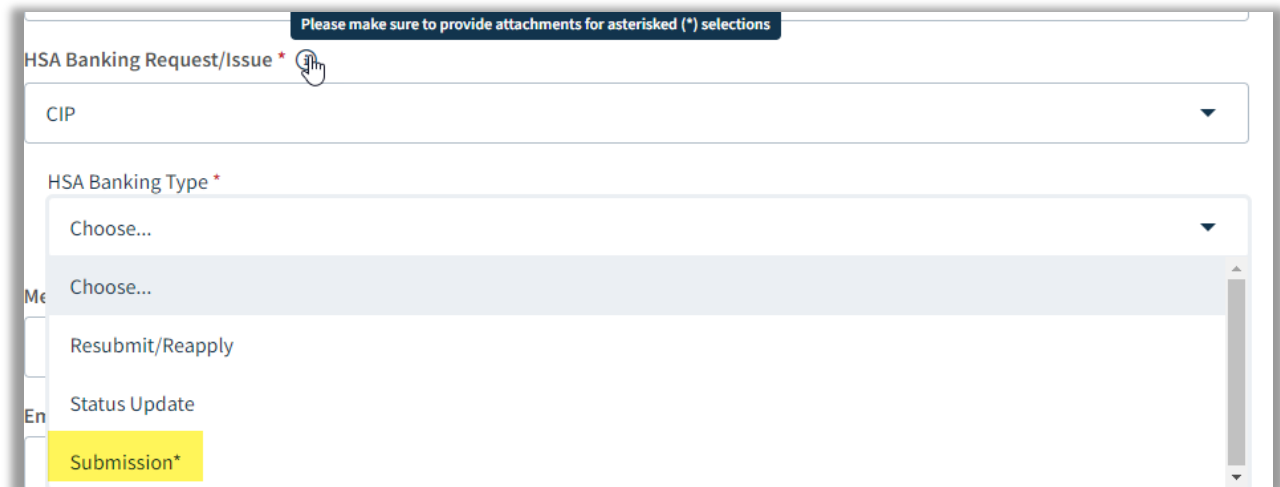
1. **Tool Tips** – will allow for some additional instructions to be provided for the field when you hover over the symbol.



2. **Placeholder text** – will allow for some additional instructions to be provided as part of the field in a light gray that once you start typing will disappear.



3. **Attachments required** – some drop down options will require an attachment to be provided. We have marked these selections with an asterisk. If no attachment is provided during the ticket submission, the system will send back a message to you that the attachment was missing from the ticket and is required for this type of submission.



Canned Forms

The ticket system has the option for us to create canned forms for information that we may need in addition to the ticket fields. These are created to replace attachments or form documents that would be filled out and need to be attached. This gives our staff the ability to process a request faster if all the information is provided as it will be populated directly in the ticket without the need to download an attachment.

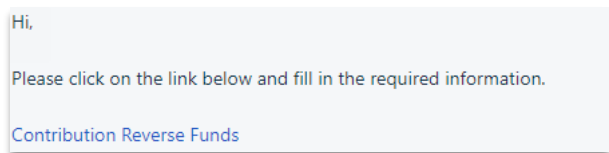
Some automated processes will send the form within seconds of the ticket being submitted. You will get the request in both email and directly on your portal screen. The ticket will go into a waiting status. This is to allow you time to complete the request.

Example of automated processes: Check Inquires or Contribution Corrections.

Note: Some tickets will now have options to check that you have provided all the details and do not need these automated forms to be sent. If you check this box and you have not provided all the details, the analyst can manually send this form for completion.

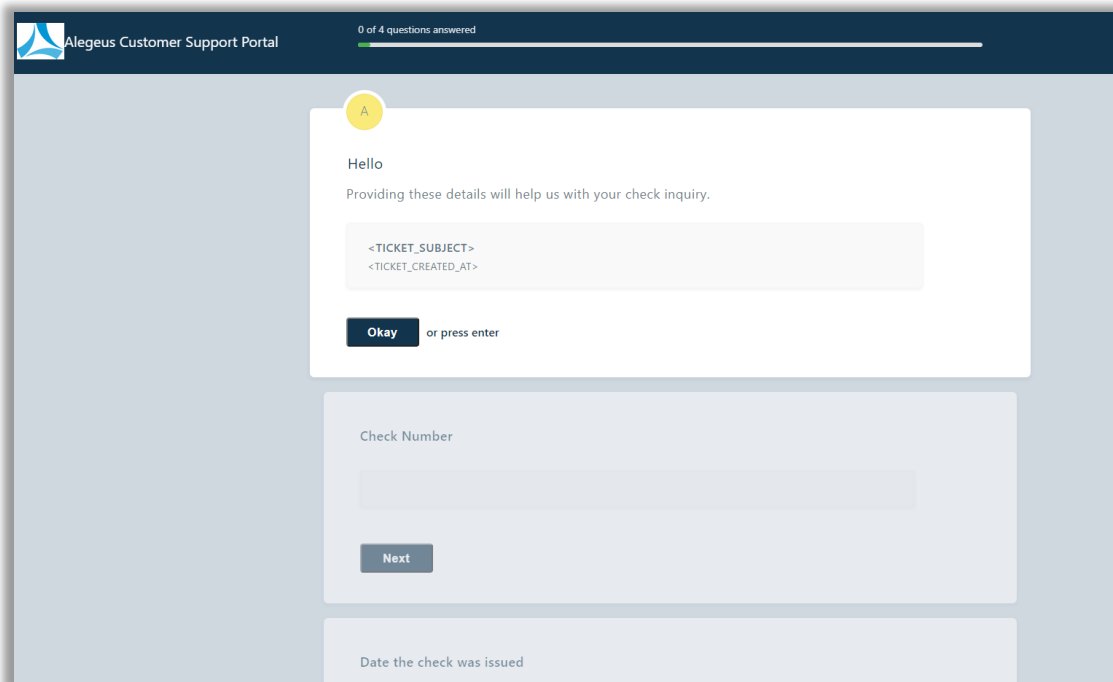
These forms will have a series of questions to be answered will be sent right back into the body of the ticket and ticket will be assigned.

Example:



Other forms may be attached to a reply throughout the process of a request by an agent.

They are very easy to fill out directly in a weblink page. Below is an example:



Alegeus Customer Support Portal 0 of 4 questions answered

A

Hello

Providing these details will help us with your check inquiry.

<TICKET_SUBJECT>
<TICKET_CREATED_AT>

Okay or press enter

Check Number

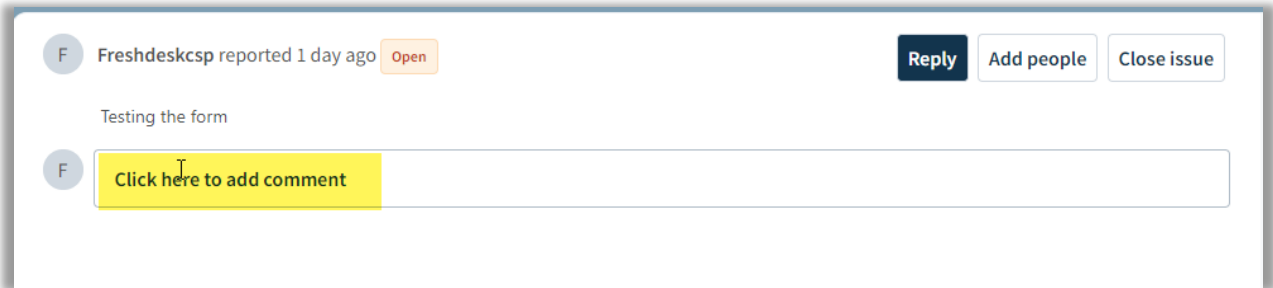
Next

Date the check was issued

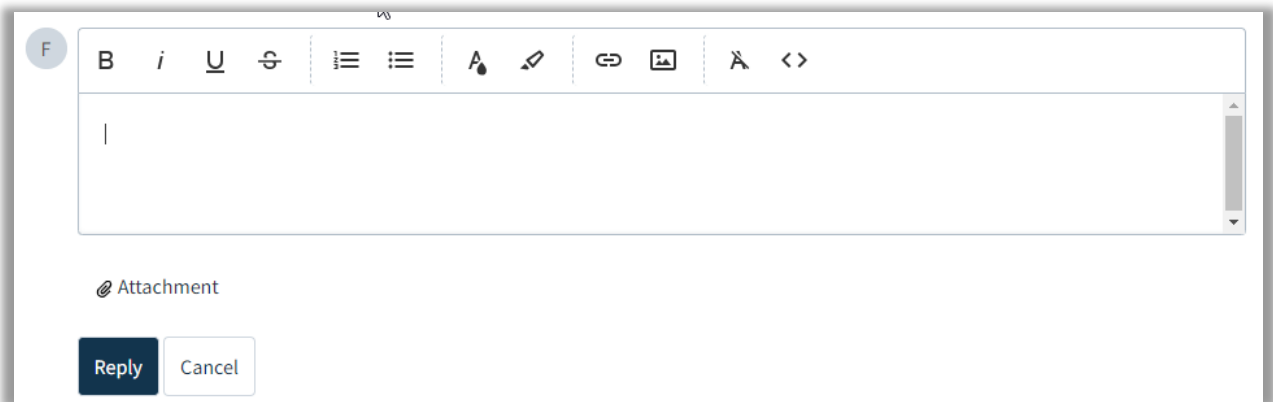
Updating a ticket

Once your ticket has been reviewed and updated by a member of our team, you will receive an email notification.

You can update the ticket or add a new comment in the Portal. From the ticket detail window, go to “click here to add comment” to display the comment box.



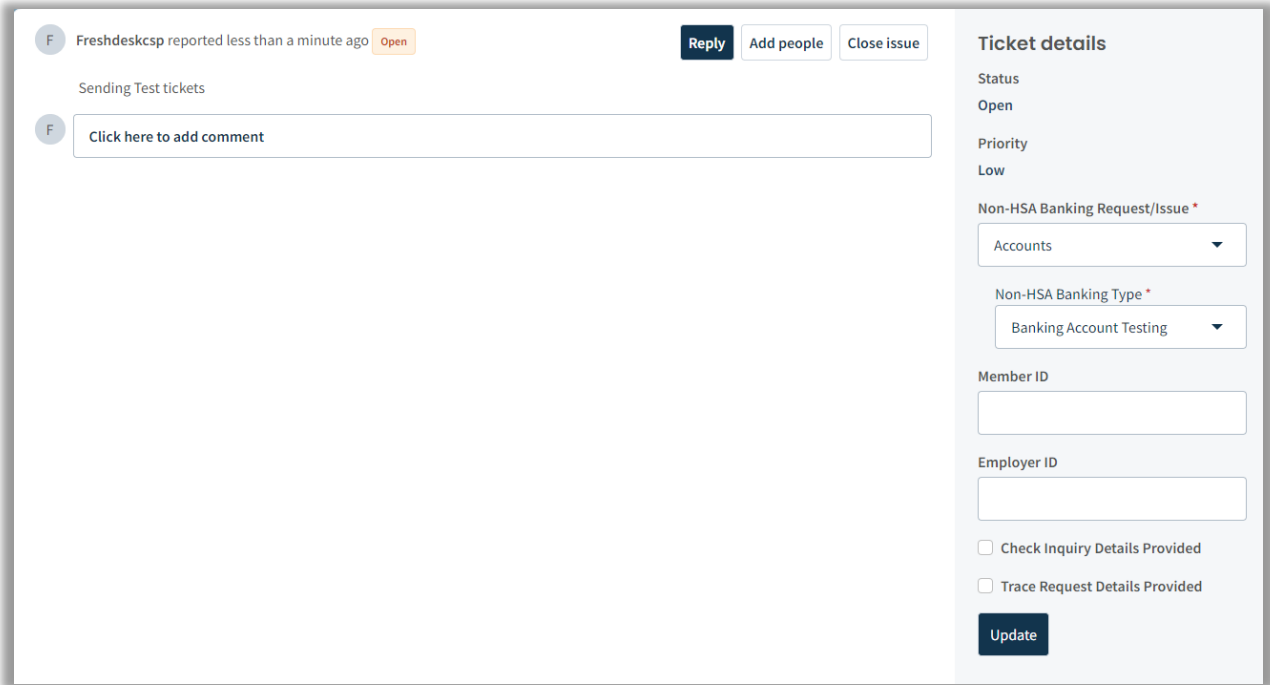
Enter any pertinent information into the comment box and click the reply button to update the ticket.



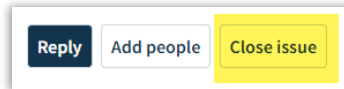
Changing Ticket Details

After a ticket has been opened, you can process some additional features:

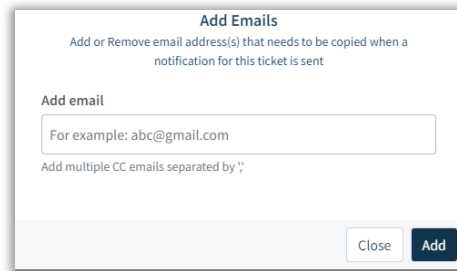
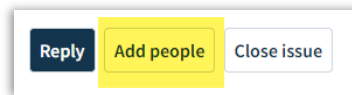
1. Change or add ticket details on the right side of the ticket details page.



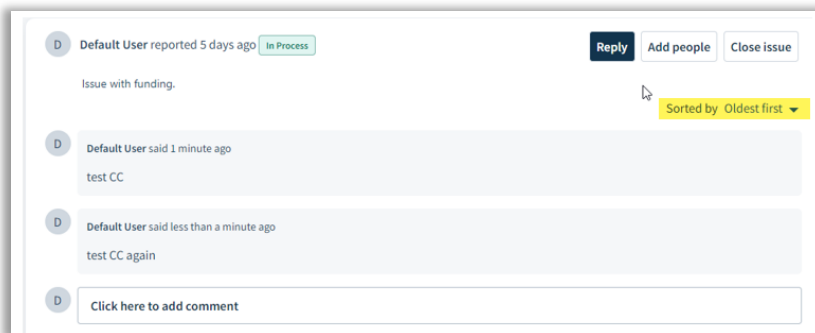
2. Close a ticket.



3. Add or remove copied 'cc' after the ticket has been submitted.



4. Sorted ticket comments/content display by oldest first or newest first.



Who can see a ticket?

This section will explain who can see tickets in the portal. All tickets contact types will get emails. In the Customer Support Portal there are the following types of contacts:

Contacts

When a ticket is submitted by a contact, the person that is submitting the ticket is made the 'primary' contact of that ticket. The primary contact can see all tickets that they submit in the ticket page, make comments and update ticket details on their own tickets.

Carbon Copy (cc)

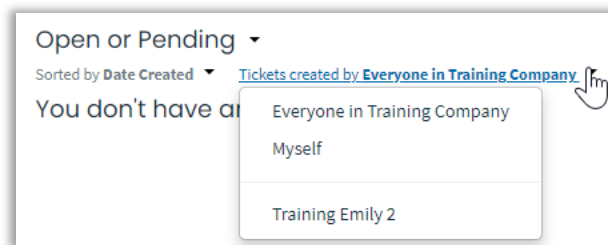
A contact on a ticket or an Alegeus agent can add a 'cc' to the ticket at any point. This 'cc' will be included on replies or comments made on the ticket but will NOT have access to the ticket in the client portal unless they can view all organizational tickets (see organizational access below).

Blind Carbon Copy (bcc)

Just as in an email the bcc, will be blind copied on a reply or comment. They will not be able to see tickets in the portal unless they can view all organizational tickets (see organizational access below).

Organizational Access Contacts

For a contact that has been granted organizational access it will allow them to see all the tickets submitted for their associated company. They will be able to filter the tickets created by themselves, everyone in the company and by specific contacts in the company. When this access has been granted, they will also be able to search for ticket numbers in the search field in the portal.



By default, every contact is set to NO. If you need to request organizational access, please submit a request in the portal admin widget.

Solutions

Click 'Knowledge Base' on the landing page to access the knowledge base. This feature will grow as we continue to improve your overall ticket experience.

Knowledge base

General (1)

General FAQ and Guides

Getting Started (1)

How do I get new users access to the portal?

How do I get new users access to the portal?

Created by Angela Giacoma, Modified on Tue, 22 Aug 2023 at 01:40 PM by Angela Giacoma

Getting access for your staff and co-workers is easy. You can share this link which has everything that a new member of your team will need to get them started on gaining access and using the Customer Support Portal: <https://info.alegeus.com/Alegeus-Support-Portal.html>

- Instructions for Self-Registration to the Customer Support Portal
- Link to the Support Portal Guide
- FAQs
- Training Videos

Print

Articles in this folder -

How do I get new users access to the portal?

Was this article helpful?

No
Yes

Forums

Forums will be our way of providing announcements and outages right into your Customer Support Portal.

Forums

Meet the community, share your experiences and queries with others

My topics (1)

My topics description

Welcome to the new Alegeus Customer Support Portal

Alegeus Forums (2)

Announcement and System Issues/Outage Notifications

Announcements (1)

Welcome to the new Alegeus Customer Support Portal

System Issues/Outages (0)

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17