

Customer Service Management

Customer

ServiceNow Teka Portal
User Guide

TEKA systems

The logo for TEKA systems, featuring the word "TEKA" in a bold, blue, sans-serif font and "systems" in a smaller, grey, sans-serif font, both contained within a light grey rectangular box with a subtle grid pattern.

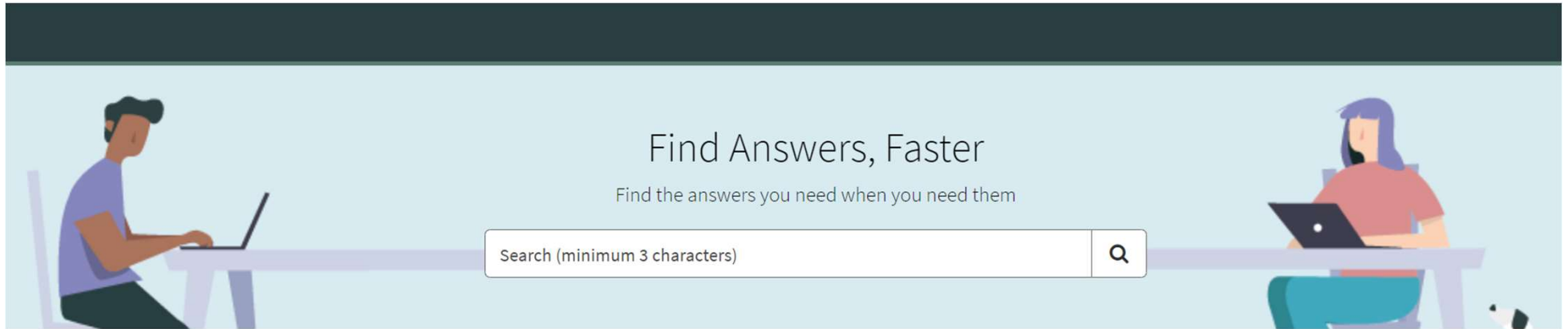
TEKA systems


01 Open a Case



1.1 Customer Service Portal

IMPORTANT NOTE : For past tickets the ticket number matches the old ticket number with the addition of CS00xxx in front of it. You can search for an old ticket using “*Ticket number” in the Number field.



 **Open a New Case**
Submit a case about your product and our support team will assist you.

Click “Open a New Case” to create a new case

1

 **My Open Cases**

Click “My Open Cases” to view all active Cases

2

 **All Cases**

Click “All Cases” to view all Cases, regardless of status

3

1.2 Open a New Case

Upon clicking "Open a New Case", the user will be redirected to the Case Form

Choose among the following types:

- Change (to be selected only in cases of system upgrade, add Ons & new industry solutions)
- Enhancement (new request)
- Complaint (bug-fixing)
- Project (new project)
- Support (support issues)
- Training (training issues)

Fill in all the fields and click "Submit"

Note: Mandatory fields are marked with a red asterisk

TEKA systems My Cases Support

Home > Customer Service > Support > Create a Customer Case Search

* Indicates required

* Short Description

* Case Type -- None -- Account Test Account 1 x

* Application Contact Customer 1 x

* Priority 4 - Low DD/MM/YYYY

Customer Text - action

Project ID

Description

Submit

Required Information Short Description Case Type Application

Add attachments

You can add an attachment by clicking on the paper clip icon "Add attachments"

1.3 Approval from the ERP Manager

Some companies require an initial approval from the ERP Manager

The Approval will be requested automatically when a customer creates a Case and is part of one of those companies

In those Cases, the initial State will be "Not Released"

Number
CS0001151

Updated
44m ago

State
Not Released

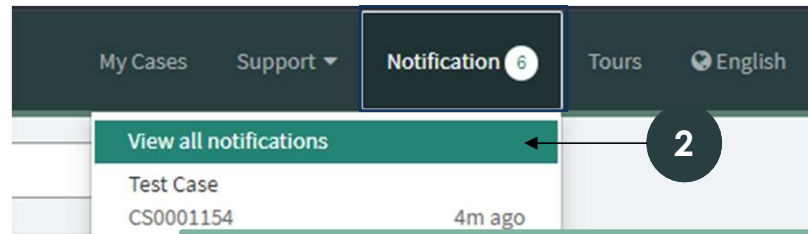
1

Example Case

Actions ▾

Case Type	Account	Contact	Application	Opened	Priority
Enhancement	Test Account 2	Customer 2	SAP ERP/S4HANA	44m ago	4 - Low

The ERP Manager can access their pending Approvals through the Customer Service Portal



2

Note: The ERP Manager will also receive a notification.

On the header menu, click "Notification" > "View all notifications"

1.3 Approval from the ERP Manager

Click on the Approval (Case ID Number)

On the Approval form page, click on "Approve" or "Reject" in order to approve or reject the Case

You can view the relevant case by clicking on "Open Case"

1

2

3

Home > Approval

Search

Approvals

- Case: CS0001116
- Case: CS0001154
- Case: CS0001121

This Case requires your approval

State Requested

Created about a month ago

Approve Reject

Additional Case Actions

Open Case

CS0001036

Approval

Approver ERP Manager 2 Case: CS0001036

State Requested

Activity

Type your message here... Post

Customer 2
15/03/2023 16:47:54
Created

Start

Approve Reject Save (Ctrl + s)



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02 Monitor the Case



2.1 Review the Case

Home > My Request -

Number CS0001152 Updated just now State Requested

Example Case Actions ▾

Case Type Training	Account Test Account 1	Contact Customer 1	Application SAP ERP/S4HANA	Opened just now	Priority 4 - Low
-----------------------	---------------------------	-----------------------	-------------------------------	--------------------	---------------------

Activity Attachments Submitted Form ←

You can view submitted details by clicking on 'Submitted form'

B I U System Font ▾ [List Icons] [Send]

C1 Customer 1 CS0001152 Created just now

Start

2.1 Review the Case

Review the case by clicking on "My Cases" in the Customer Service Portal header menu

1

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My Cases Support Notification 1 English Customer 1

Home > My Request -

Home > My Lists

Click on the ID Number of the Case to open it

Number	Short description	Case Type	Account	Application	State	Priority	Contact	Reschedule Status	Opened	Responded	Delivered at	Close
CS0001152	Sample Case		Test Account 1	SAP ERP/S4HANA	Requested	4 - Low	Customer 1	Not Requested	26/04/2023 21:05:53			

2

Home > My Request -

Number: CS0001152 Updated: 4m ago State: Requested

Example Case Actions

Case Type: Training	Account: Test Account 1	Contact: Customer 1	Application: SAP ERP/S4HANA	Opened: 4m ago	Priority: 4 - Low
---------------------	-------------------------	---------------------	-----------------------------	----------------	-------------------

Activity Attachments Submitted Form

Send

Customer 1 CS0001152 Created 4m ago

2.1 Review the Case

Unique ID Number

Home > My Lists

Cases

All > Short description starts with example

Number	Short description	Case Type	Account	Application	State	Priority	Contact	Reschedule Status
CS0001152	Example Case	Training	Test Account 1	SAP ERP/S4HANA	Requested	4 - Low	Customer 1	Not Requested

Rows 1 - 1 of 1

When this Case moved to "Responded"

When this Case was last updated by any user

When this Case was Closed

Opened	Responded	Delivered at	Closed	Canceled at	Updated
26/04/2023 21:05:53					26/04/2023 21:12:07

If a reschedule has been requested, it will show up here

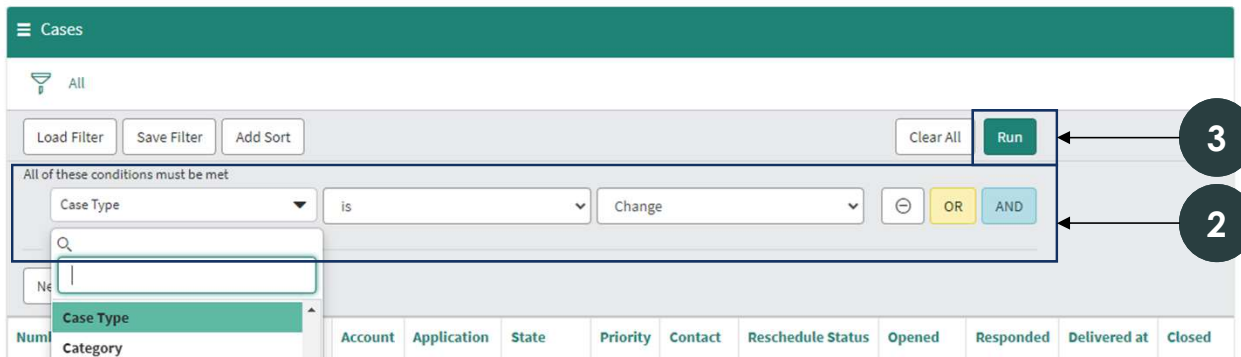
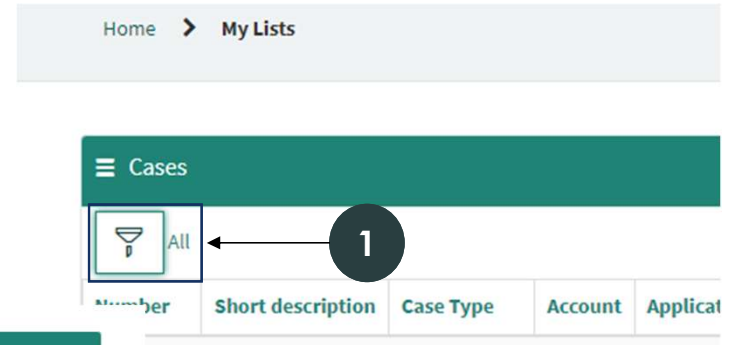
Date that this Case was created on

When this Case moved to "Delivered"

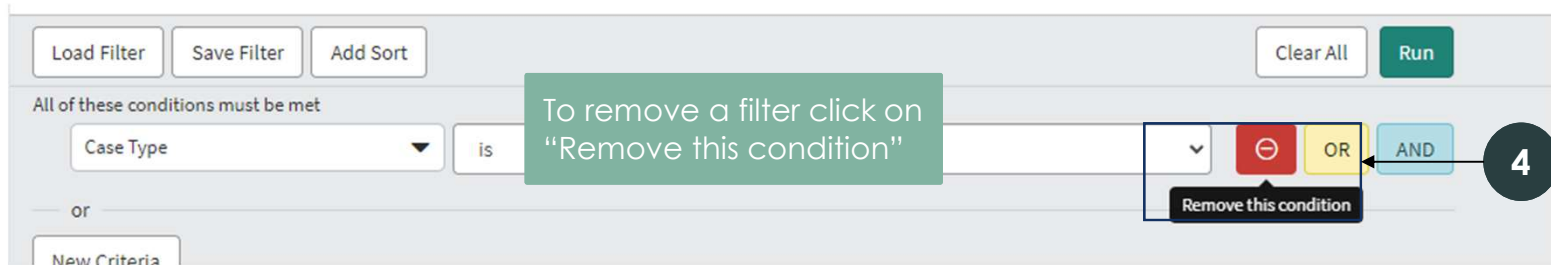
When this Case was Canceled

2.1 Review the Case

You can filter the Case list by clicking on the Filter Icon



Choose a field, set up your filter and click "Run"



To remove a filter click on "Remove this condition"

2.1 Review the Case

The screenshot shows a user interface for reviewing a case. The breadcrumb navigation at the top reads "Home > My Request -". The main content area is divided into several sections:

- Case Information:** A header section containing the case number "Number CS0001152" (labeled "Unique ID Number"), the title "Example Case" (labeled "Title"), and the state "State Requested" (labeled "State of the Case"). It also shows "Updated 5m ago" and an "Actions" dropdown menu.
- Case Details:** A table-like view with the following data:

Case Type	Account	Contact	Application	Opened	Priority
Training	Test Account 1	Customer 1	SAP ERP/S4HANA	5m ago	4 - Low
- Case form tabs:** A tabbed interface with "Activity" (selected), "Attachments", and "Submitted Form".
- Activity:** A rich text editor with a toolbar (Bold, Italic, Underline, System Font, bullet points, numbered list) and a "Send" button. Below the editor is a message from "Customer 1" (labeled "C1") with a "Start" button and a timestamp of "5m ago".

2.2 Additional Comments

Add additional comments/ information or communicate with the Agent or the CSM Team through the activity tab

The screenshot displays a user interface with three tabs: 'Activity', 'Attachments', and 'Submitted Form'. The 'Activity' tab is active and contains a text editor with a toolbar (bold, italic, underline, font size, alignment, list) and a large text input area. A green callout box with the number '1' points to the text input area, and another green callout box with the number '2' points to a 'Send' button located to the right of the text editor. Below the text editor, there is a list of activity items. The first item is from 'Customer 1' and contains the text 'Example Comment 1', with a timestamp of 'just now' and the label 'Additional comments'. The second item is also from 'Customer 1' and contains the text 'CS0001152 Created', with a timestamp of '6m ago'. A 'Start' button is visible at the bottom left of the activity list. A green callout box with the text 'Write a comment in the text box' is positioned over the text editor area.

2.3 Attachments

Add attachments or view all attachments in the "Attachments" Tab

Home > My Request -

Number
CS0001152

Updated
2m ago
State
Requested

Example Case

Actions ▾

Case Type Training	Account Test Account 1	Contact Customer 1	Application SAP ERP/S4HANA	Opened 8m ago	Priority 4 - Low
-----------------------	---------------------------	-----------------------	-------------------------------	------------------	---------------------

Activity **Attachments** Submitted Form



2

1

Drop files here

3

Click the paper clip icon or drag and drop files in the "Drop files here" area

2.4 Review the Submitted Form

Review original Submitted form from the "Open a New Case" page in the "Submitted Form" tab

Home > My Request -

Training Test Account 1 Customer 1 SAP ERP/S4HANA 9m ago 4 - Low

Activity Attachments **Submitted Form**

* Short Description
Example Case

* Case Type Account
Training Test Account 1

* Application Contact
SAP ERP/S4HANA Customer 1

Module Due Date
SAP CS 28/04/2023

* Priority Program-Transaction
4 - Low

Customer Text

Project ID

1

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03 Cancel Case



3.1 Cancel the Case

Home > My Request -

Cancel the Case by clicking the "Actions" Button

Number CS0001152

Updated 20m ago State Requested

Example Case

Case Type	Account	Contact	Application	Opened	Priority
Training	Test Account 1	Customer 1	SAP ERP/S4HANA	26m ago	4 - Low

Choose "Cancel Case"

1

A pop-up window will appear:

Note: If a case is canceled, it cannot be reopened.

Warning



Are you sure that you want to close this case?
Once closed, this case cannot be reopened.

Click "Cancel Case"

Go Back

Cancel Case

2

Note: Cases may only be canceled if they are in the Not Released, Requested or Responded states

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04 Reschedule Case



4.1 Request a Reschedule for the Case

Home > My Request -

Number CS0001152

Updated just now State **Delivered**

1 Actions
Close Case
Request Reschedule

Example Case

Case Type	Account	Contact	Application	Opened	Priority
Training	Test Account 1	Customer 1	SAP ERP/S4HANA	29m ago	4 - Low

UAT Assigned to User A.2 Test Res... Delivered at just now

2 Request Reschedule

Example Reason

Cancel Request Reschedule

3

All > State in (Requested, Not Released, Responded, Scheduled, Delivered)

Number	Short description	Case Type	Account	Application	State	Priority	Contact	Reschedule Status
CS0001152	Example Case	Training	Test Account 1	SAP ERP/S4HANA	Delivered	4 - Low	Customer 1	Requested By Customer

If a Case is in the "Delivered" State, a Reschedule Request may be submitted by clicking on "Actions/ "Request Reschedule"

Fill in a reason (e.g. report data are wrong) on the pop up window and click on "Request Reschedule"

The Reschedule Status field will change to "Requested by Customer"

Note: You will receive a notification when the reschedule is completed

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05 Close Case



5.1 Close Case

To Close a Case, click on the "Actions" button and choose "Close Case"

Home > My Request -

Number
CS0001152

Updated 4m ago State **Delivered**

Example Case

Case Type Training	Int Test Account 1	Customer 1	Application SAP ERP/S4HANA	Opened 32m ago
-----------------------	-----------------------	------------	-------------------------------	-------------------

UAT Assigned to User A.2 Test Res... Delivered at 4m ago

Priority 4 - Low

Actions -
Close Case
Request Reschedule

1

A pop up window will appear:

Note: A case will automatically close after 30 days if no actions have been taken. You will also receive a notification 15 days prior to the automatic closure.

Note: If a case is closed, it cannot be reopened.

Warning

Are you sure that you want to close this case?
Once closed, this case cannot be reopened.

Click on "Close Case"

2

Cancel Close Case

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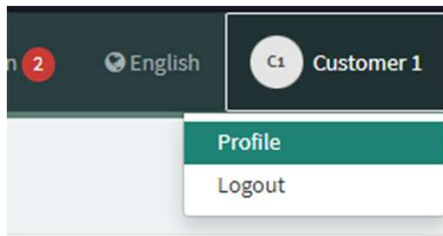
06 Notifications



6.1 Notifications

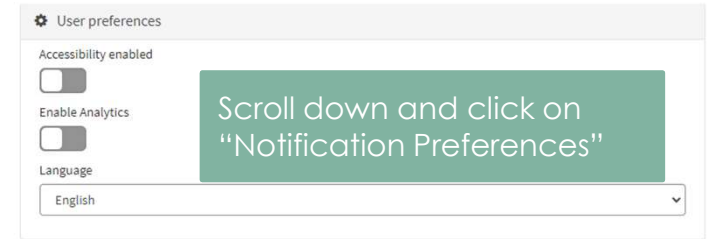
Optional notifications may be disabled through the Customer Service Portal:

You will receive email and in-platform notifications regarding your Case status, comments, attachments added or potential reschedules.



Click on "Profile"

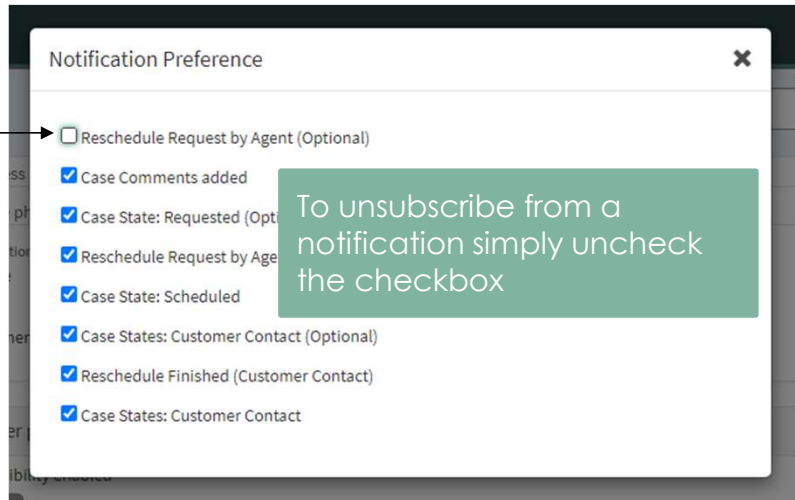
1



Scroll down and click on "Notification Preferences"

2

3



To unsubscribe from a notification simply uncheck the checkbox

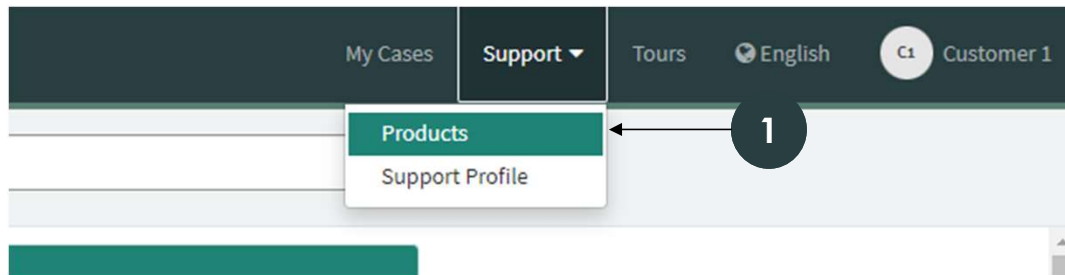
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07 General Access



7.1 Customer - Products



Customers can access their company's products through the Customer Service Portal: (Support>Products)

☰ Sold Products

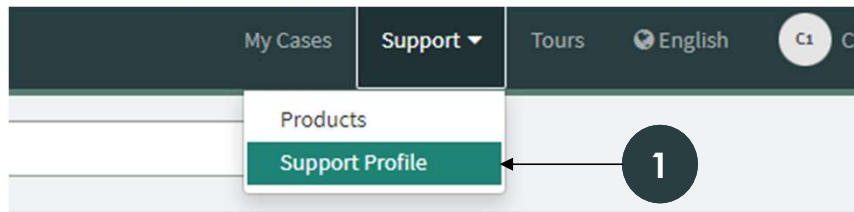
🔍 All > Product Class = Application Model

Number	Name	Product	Account	Contact	Parent	Model categories ▾
SLPRD0002280	SAP ERP/S4HANA	SAP ERP/S4HANA	Test Account 1			Software

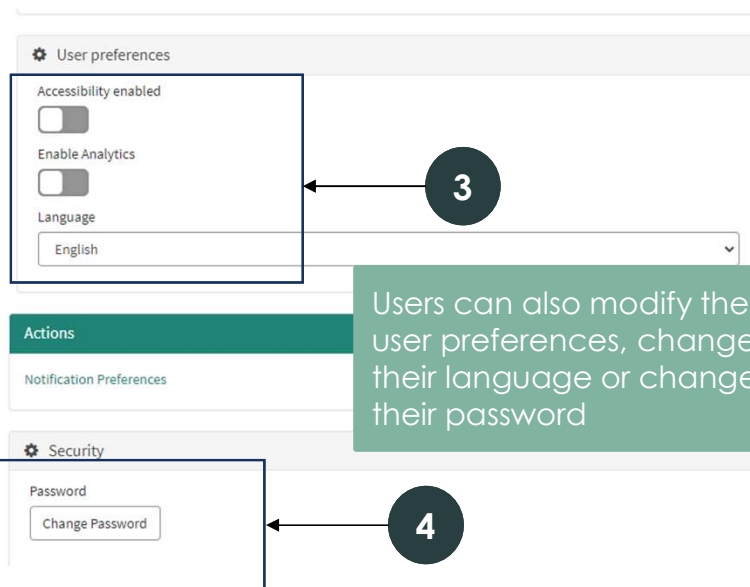
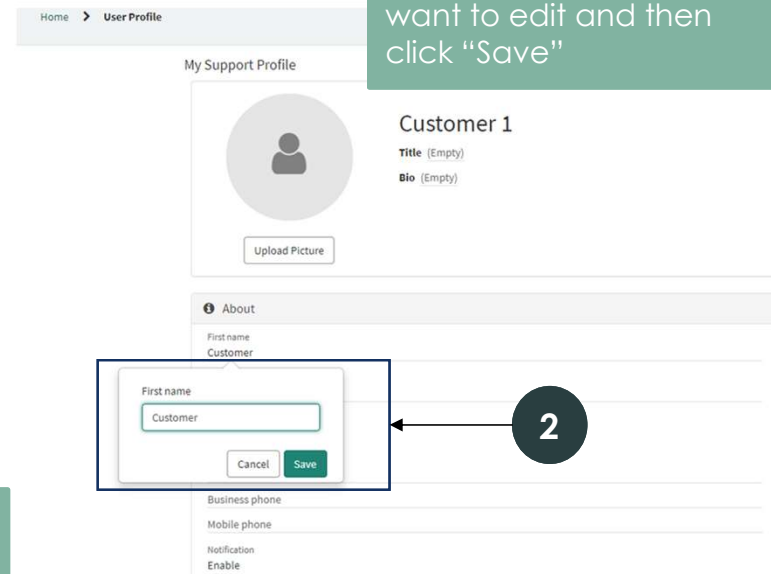
⏪ ⏩ Rows 1 - 1 of 1

7.2 Customer - Modify Personal Info

Customers can modify their personal info through the Customer Service Portal (Support > Support Profile)



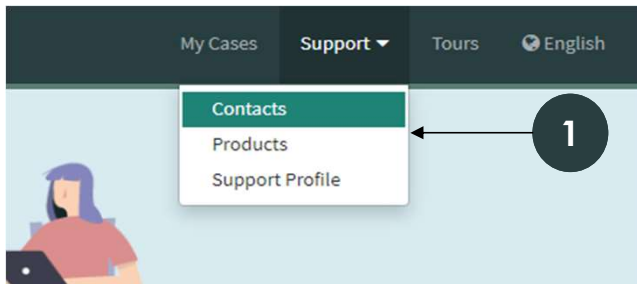
Click on the field you want to edit and then click "Save"



Users can also modify their user preferences, change their language or change their password

Note: Users are not able to edit all fields

7.3 ERP Manager - Contacts



ERP Managers can access their Account's contacts through the Customer Service Portal (Support > Contacts)



The screenshot shows a table of contacts with the following columns: Name, Account, Email, Business phone, Active, and Updated. The first row is highlighted, and a callout bubble with the number '2' points to the 'Name' field. A note box explains that ERP Managers can access a Contact's info by clicking on the 'Name' field.

Name	Account	Email	Business phone	Active	Updated
Customer 1	Test Account 1	test@test.test		true	07/03/2023 13:20:05
Customer Account Manager 1	Test Account 1	test@test.help		true	03/03/2023 16:47:53

Rows 1 - 2 of 2

Note: ERP Managers can only view customers that are belong to their Account.

7.3 ERP Manager - Contacts

Home > Contact Search

Customer 1 📎

Contact

First name <input type="text" value="Customer"/>	*Account <input type="text" value="Test Account 1"/>
*Last name <input type="text" value="1"/>	*Email <input type="text" value="test@test.test"/>
Title <input type="text"/>	Business phone <input type="text"/>
Language <input type="text" value="System (English)"/>	Mobile phone <input type="text"/>
Time zone <input type="text" value="System (Europe/Athens)"/>	Notification <input type="text" value="Enable"/>
User ID <input type="text" value="customer..1"/>	

Save (Ctrl + s)

Actions

- Edit Roles
- Disable Login

ERP Managers can then modify a Contact's info and click "Save"

Users can also edit a contact's role and disable login through the "Actions" section

1

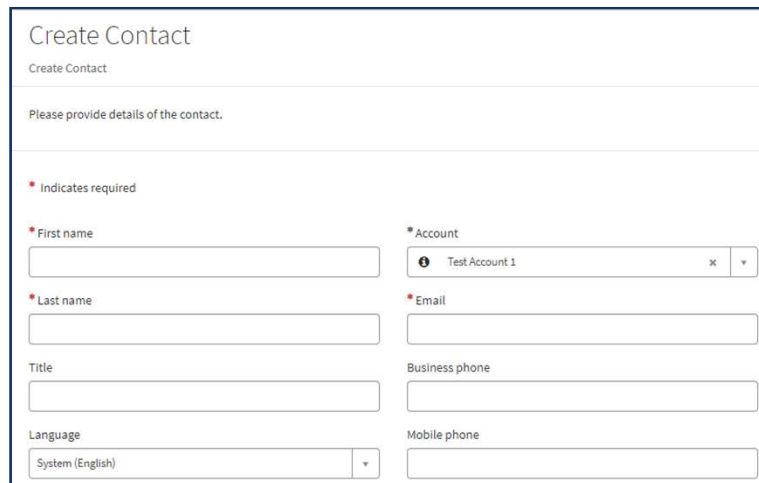
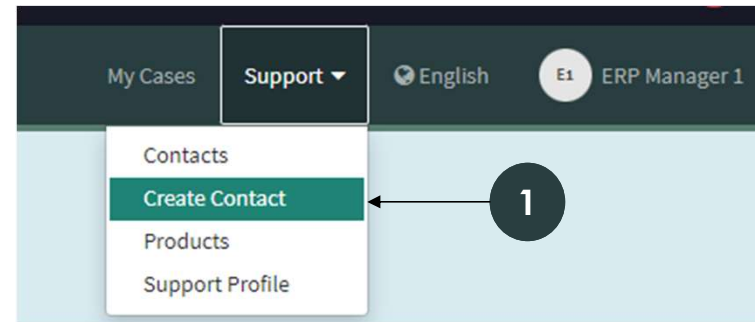
2

Activate Win
Go to Settings to

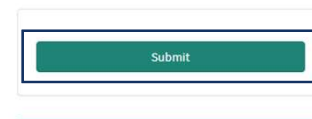
7.4 ERP Manager - Create new Contacts

ERP Managers can create new Contacts through the Customer Service Portal.

Support > Create Contact



A screenshot of the 'Create Contact' form. The title is 'Create Contact' and the subtitle is 'Create Contact'. Below the title, it says 'Please provide details of the contact.' A legend indicates that a red asterisk (*) denotes required fields. The form contains several input fields: 'First name' (required), 'Last name' (required), 'Title', 'Language' (set to 'System (English)'), 'Account' (set to 'Test Account 1'), 'Email' (required), 'Business phone', and 'Mobile phone'. A black circle with the number '2' and an arrow points to the 'Email' field.



Add the necessary information and click "Submit"

Fields marked with a red asterisk are mandatory

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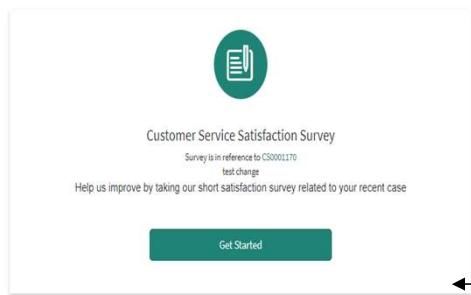
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08 Customer Satisfaction Survey

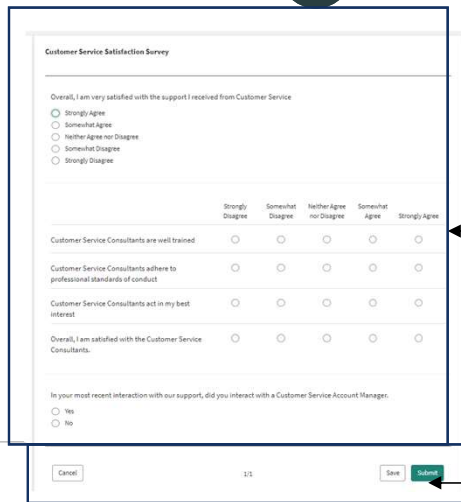


8.1 Customer Satisfaction Survey

Once a case is completed (State : Closed Complete) the browser will redirect the user to the customer satisfaction survey associated with the specific case.



1 If the user chooses to click the "Get Started" button the survey screen will load up. If the user closes the browser or clicks on another link e.g. my cases the survey will be discarded.

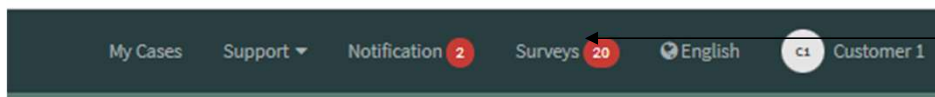


2 Question Section in order for the customer to evaluate the provided services.

3 Options available to the user "Cancel" will discard the answer and survey «Save» will save the answers but will not submit the survey and it will remain as unsubmitted and «Submit» Which will save the answers to the survey and submit the results for review.

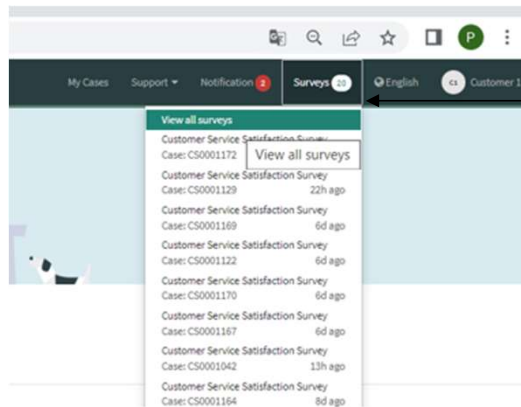
8.2 Customer Satisfaction Survey

We can access our Pending Surveys, though the head of the main page at a later time.



1

In order to access our Pending surveys we click on "Surveys" the header of the page .



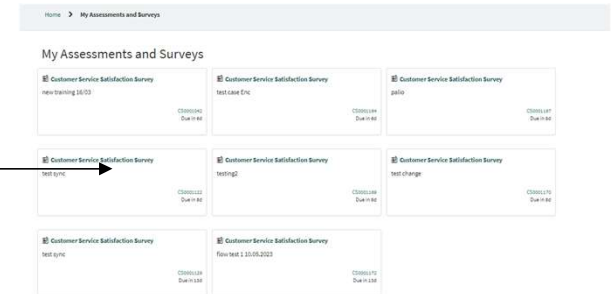
2

In the new submenu we can see our most recent pending surveys. In order to view all our pending surveys we click on "View all surveys".

Notice: An expiration time of 14 days has been set for the surveys. If that period expires the Survey will withdraw from the pending items without contributing to the final results.

In the new window we can see all our pending surveys, along with some extra details on a tabular form. In order to select and complete a survey we should click on the title of the relevant Box.

3



The logo for TEKA systems is centered on a dark blue background. It features the word "TEKA" in a bold, blue, sans-serif font, followed by the word "systems" in a lighter, grey, sans-serif font. The text is set against a semi-transparent, light-colored rectangular background with a fine grid pattern.

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