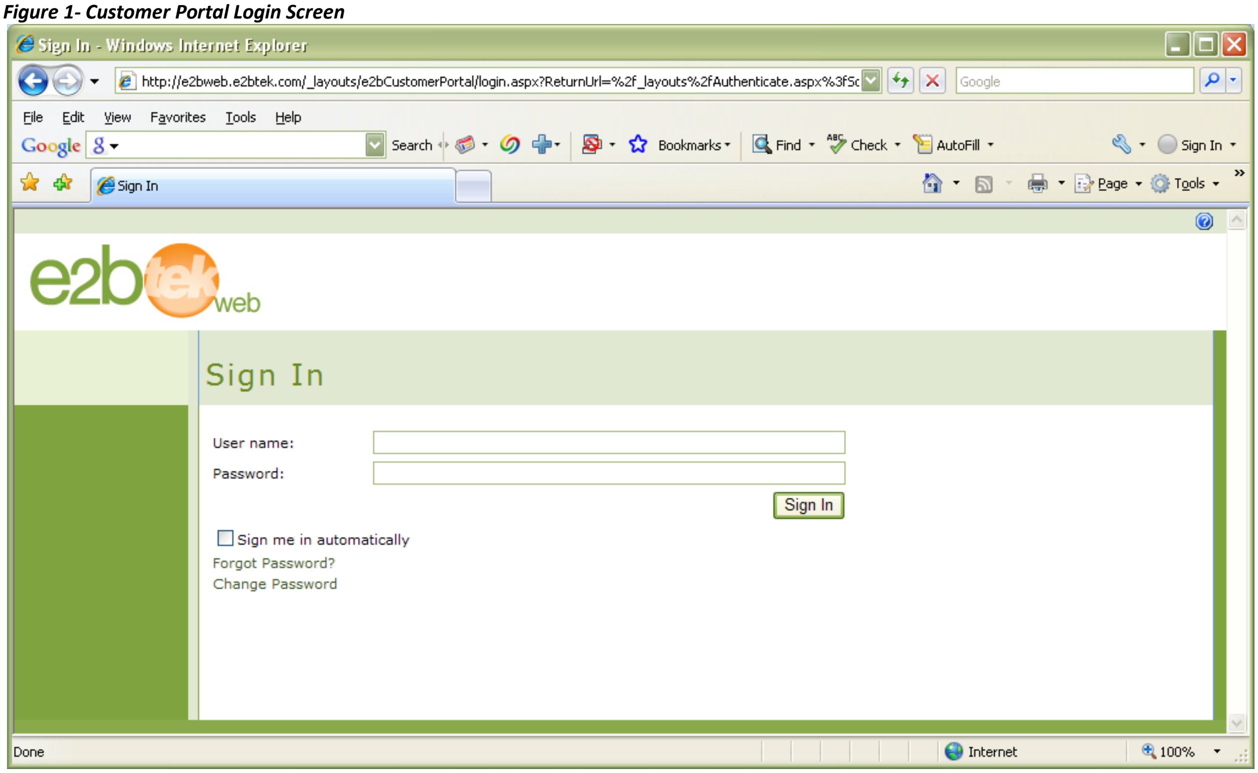
E2B Customer Portal

E2B has created a customer portal to allow users to review project and support status, support task notes, the ability to create new support cases as well as many other activities. This document will walk you through accessing the Customer Portal and maneuvering through some of the most frequently used areas.

To access the Customer Portal, open your internet browser and type the following: e2bweb.e2btek.com The login screen (figure 1) will appear and request your login information. If you are not registered and have not received login information, please contact E2B support at 440.352.4700 (Option 1) and they will provide you with the required account information. If you received you login information but forgot your password, click on the forgot password.

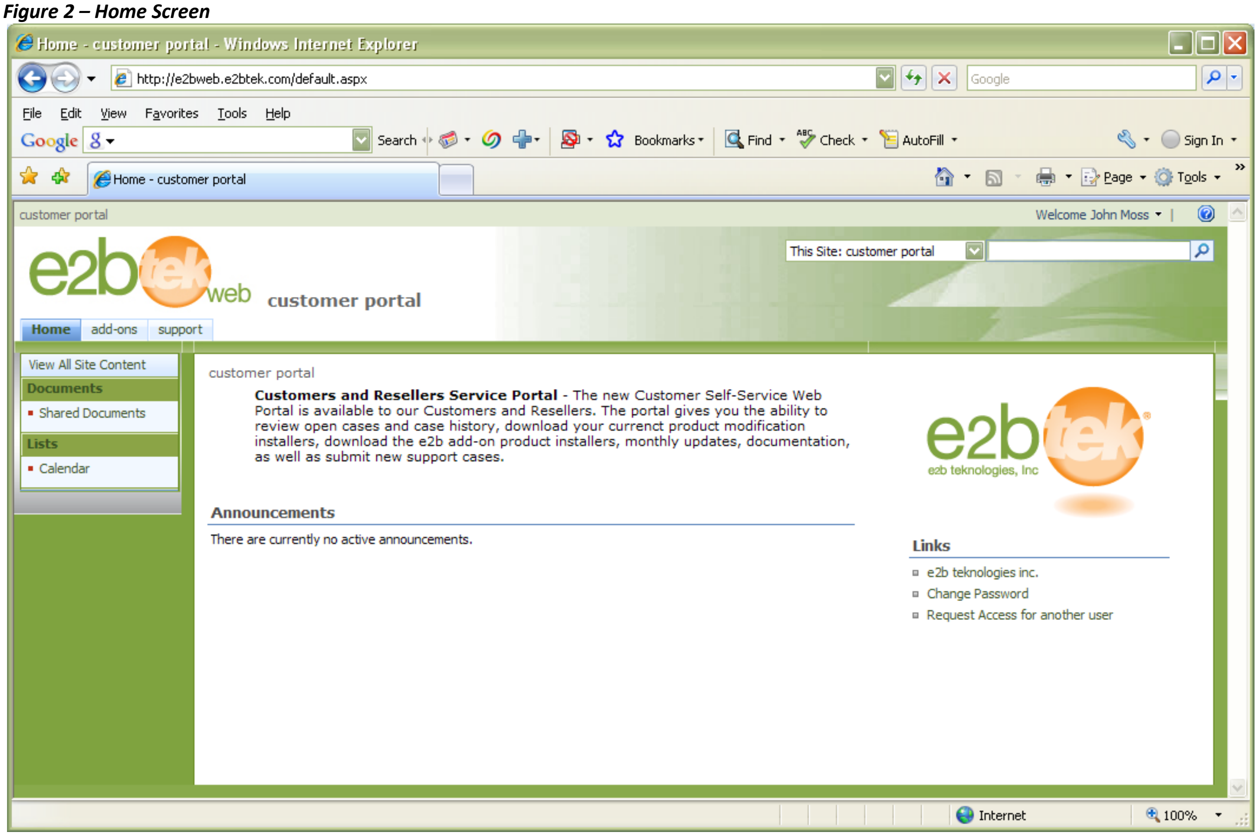
Figure 1- Customer Portal Login Screen



Home Tab

Once logged into the Customer Portal, a screen will display containing three tabs towards the top of the screen – **Home**, **add-ons** and **support.** You will also notice several links on the right side of the screen. These links provide the ability to perform important tasks and vary depending on the tab selected from the top of the screen. Below you will find the main page or "Home" page from which a user can view E2B's website, change their password or request access for another authorized contact. This last task is important because any user that has access to the Customer Portal will have the ability to create supports and therefore will be considered an authorized contact.

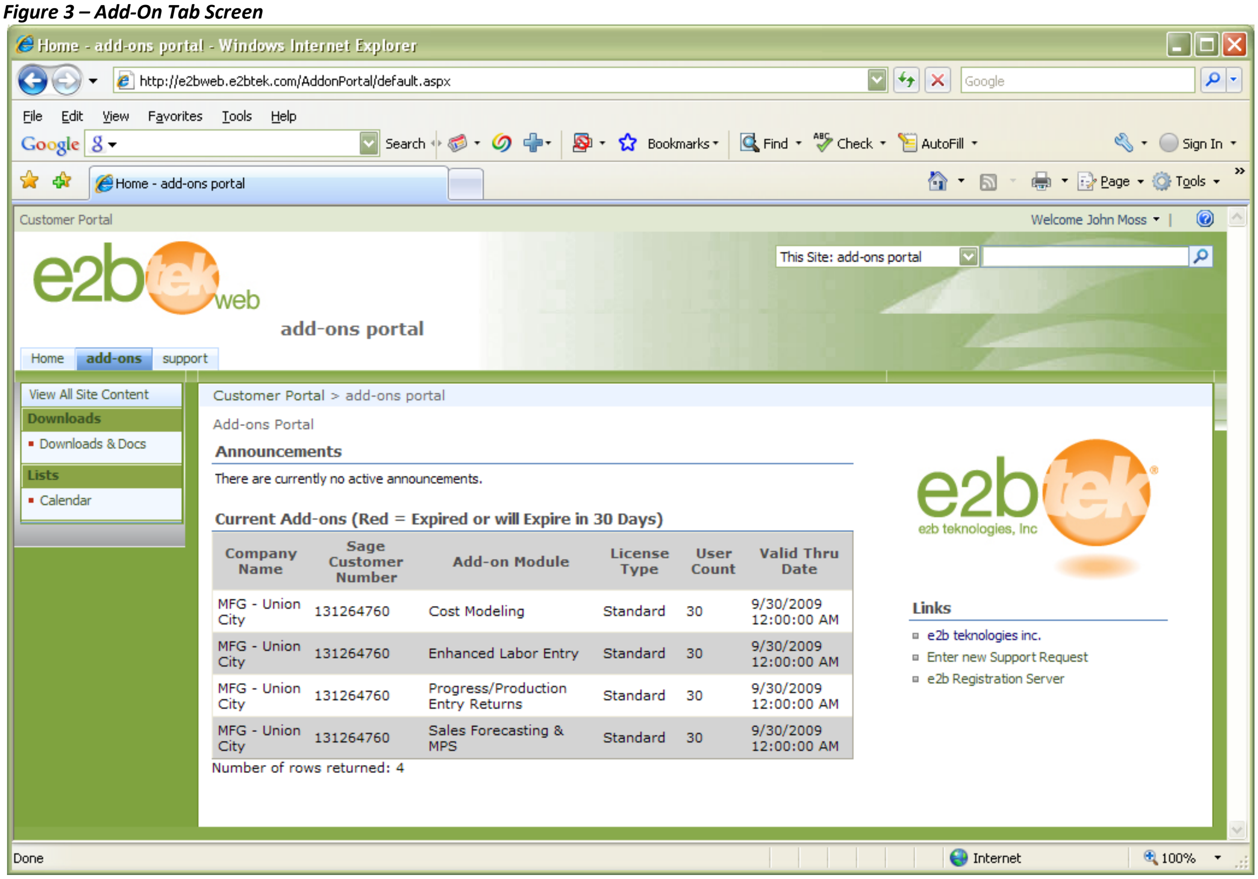
Figure 2 – Home Screen



Add-On Tab

The Add-On tab displays all E2B Software products owned by the customer as well as important information pertaining to each product license. This includes license type, user count and the expiration date of the product's annual clientcare maintenance.

Figure 3 – Add-On Tab Screen



Another import task found under the Add-On tab is the "Downloads & Docs" (figure 4). This task is where our support team places all monthly update installers for our add-on products, ClientCare documentation as well as all of the user guides for our add-on products. Please contact support if you are unsure of the installers and/or order of installation.

On the right side of the screen, there is an option to "Enter new Support Request" (figure 5). This is the preferred method of creating a support case. By using this function, a support case will be generated and an email response will be delivered with the case number included (figure 6). This email should be used for any communications regarding the support case because the case number found in the header automatically links all communications to the project.

Figure 4 – Downloads & Docs View found under the Add-On Tab

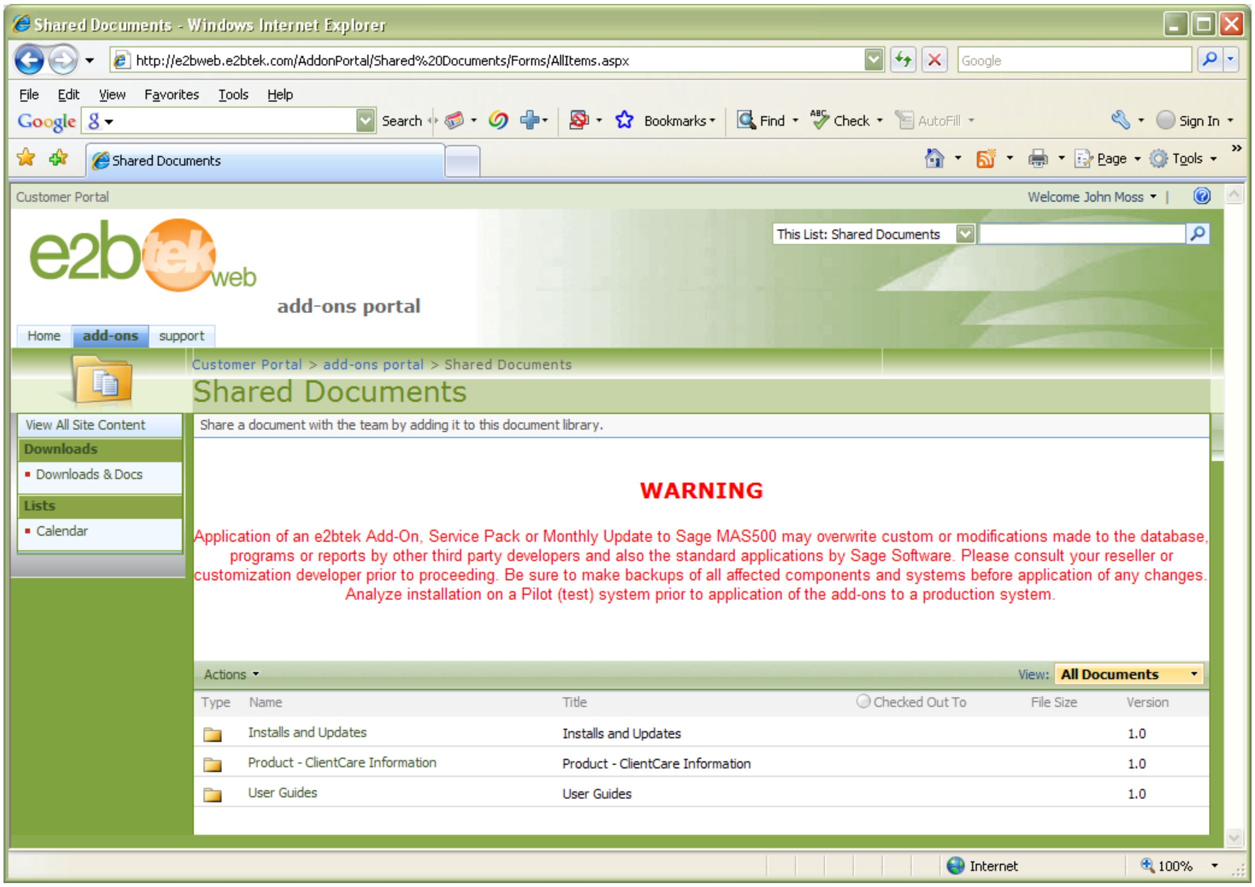
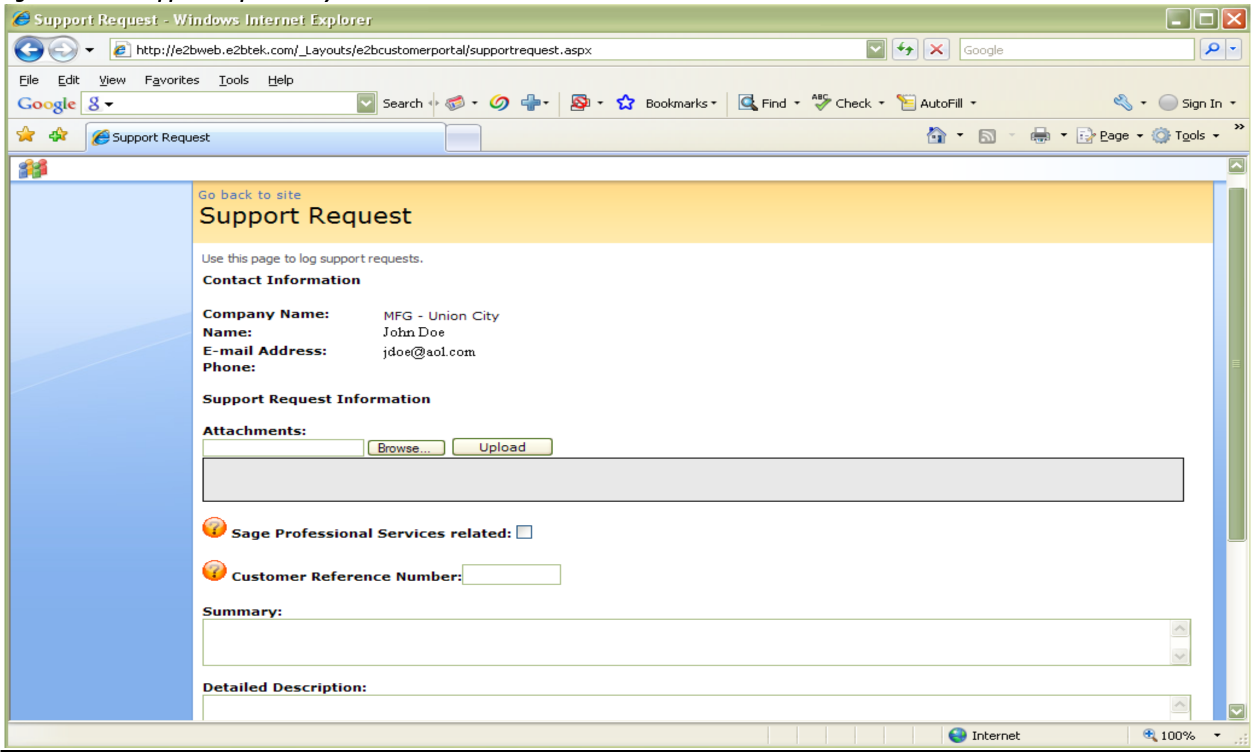


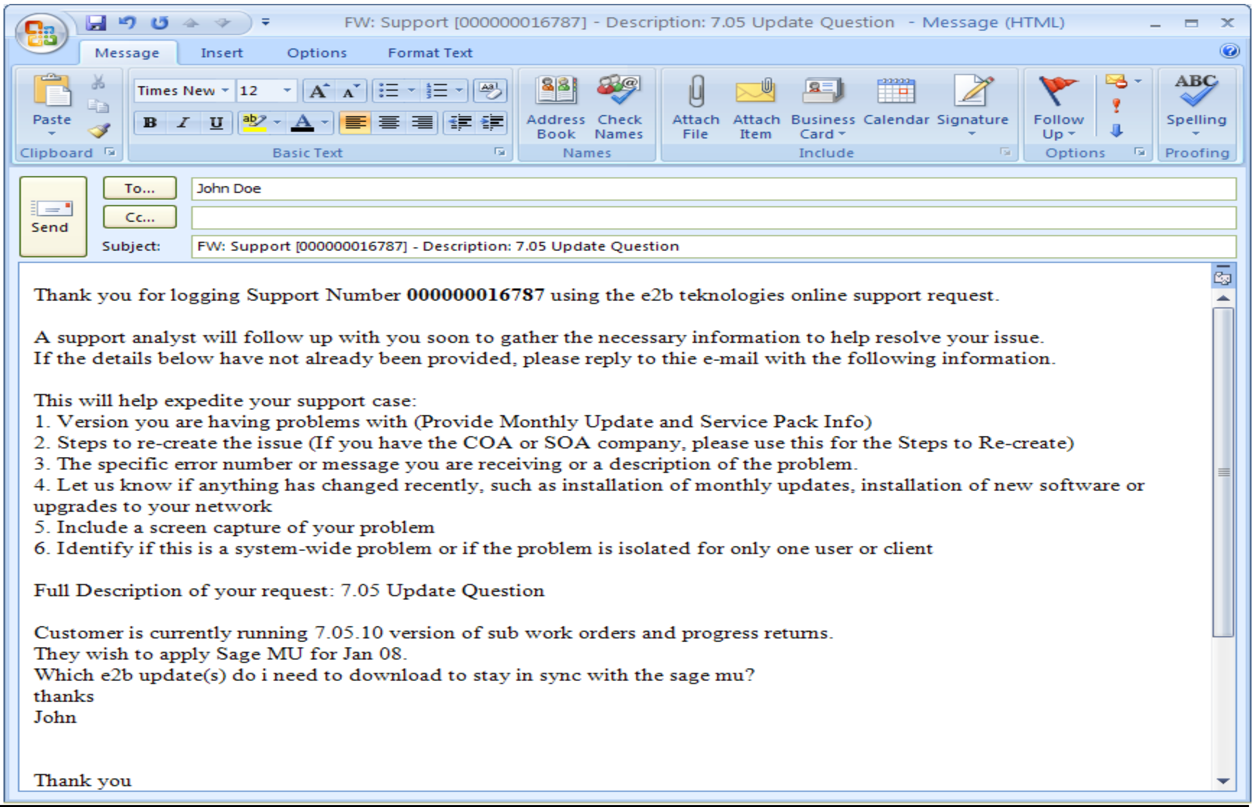
Figure 5 – New Support Request Entry Screen



Note –

- When using the attachments, you must browse and locate the file and then click on the upload to attach to the support case. Please use this to attach any supporting documentation like screen shots or reports.
- "The Sage Professional Services related" option should only be selected if the support being issued is directly related to a Sage Professional Services group shelf mod. If we receive a support with this designation, we will contact Sage PSG for approval before we begin working on the case. Typically this option is not selected.
- "Customer Reference Number" option should be populated if there is an internal reference number that the customer would like to attach to the e2b support case.
- Summary – A brief description of issue you are having.
- Detail Description - Please provide as much detail, including steps to recreate. The more detail support receive will provide a quicker resolution time.

Figure 6 – Auto response email example



FW: Support [000000016787] - Description: 7.05 Update Question - Message (HTML)

To... John Doe

Cc...

Subject: FW: Support [000000016787] - Description: 7.05 Update Question

Thank you for logging Support Number **000000016787** using the e2b teknologies online support request.

A support analyst will follow up with you soon to gather the necessary information to help resolve your issue.
If the details below have not already been provided, please reply to thie e-mail with the following information.

This will help expedite your support case:
1. Version you are having problems with (Provide Monthly Update and Service Pack Info)
2. Steps to re-create the issue (If you have the COA or SOA company, please use this for the Steps to Re-create)
3. The specific error number or message you are receiving or a description of the problem.
4. Let us know if anything has changed recently, such as installation of monthly updates, installation of new software or upgrades to your network
5. Include a screen capture of your problem
6. Identify if this is a system-wide problem or if the problem is isolated for only one user or client

Full Description of your request: 7.05 Update Question

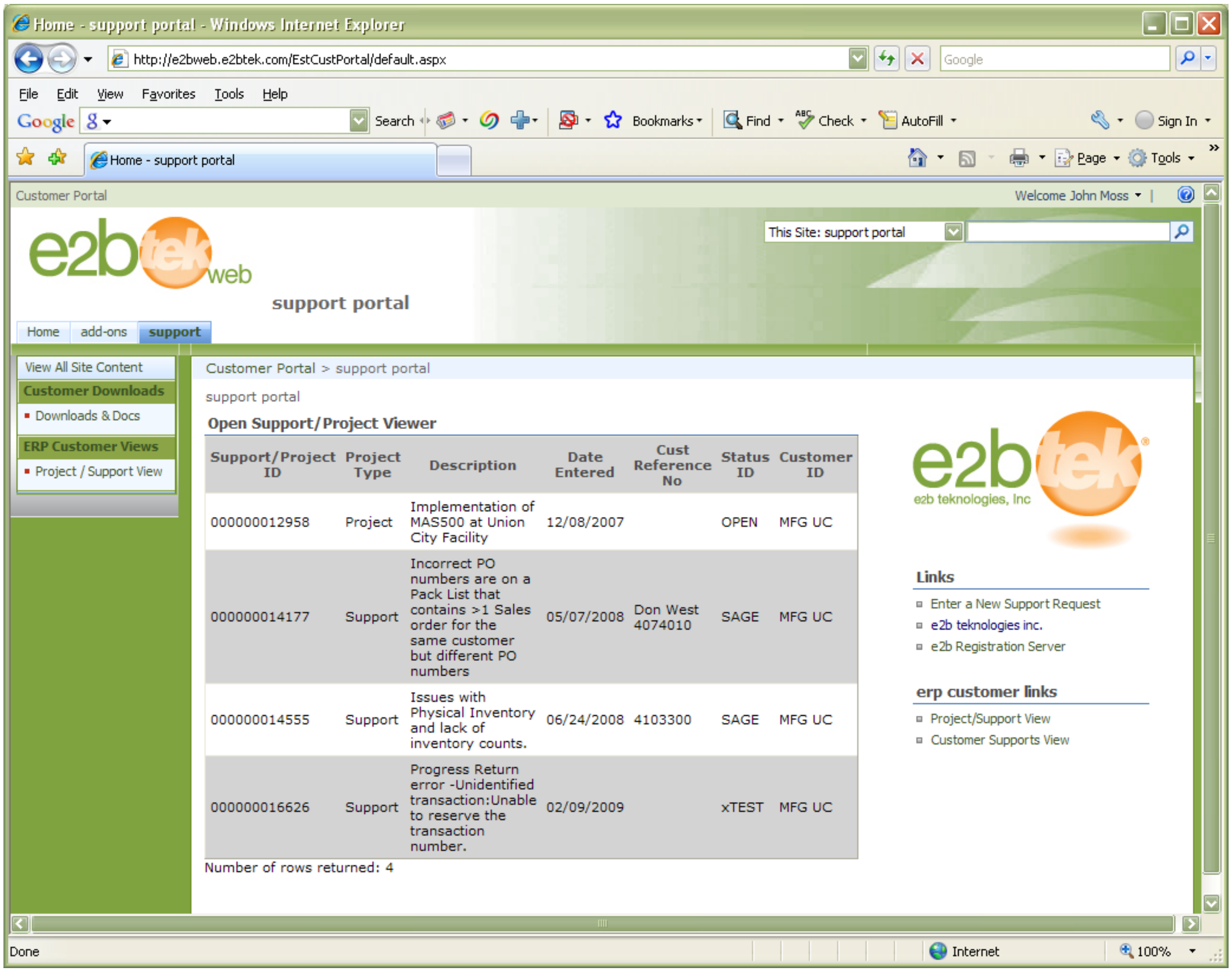
Customer is currently running 7.05.10 version of sub work orders and progress returns.
They wish to apply Sage MU for Jan 08.
Which e2b update(s) do i need to download to stay in sync with the sage mu?
thanks
John

Thank you

Support Tab

The Support tab displays all open projects and support cases. The links found at the right side of the screen provide the same options found under the Support tab.

Figure 7 – Support Screen



Support/Project ID	Project Type	Description	Date Entered	Cust Reference No	Status ID	Customer ID
000000012958	Project	Implementation of MAS500 at Union City Facility	12/08/2007		OPEN	MFG UC
000000014177	Support	Incorrect PO numbers are on a Pack List that contains >1 Sales order for the same customer but different PO numbers	05/07/2008	Don West 4074010	SAGE	MFG UC
000000014555	Support	Issues with Physical Inventory and lack of inventory counts.	06/24/2008	4103300	SAGE	MFG UC
000000016626	Support	Progress Return error -Unidentified transaction:Unable to reserve the transaction number.	02/09/2009		xTEST	MFG UC

A user can also view Projects and Supports with the ability to filter the list and export to Excel by clicking on the “Project/Support View” (figure 8). The “Customer Supports View” (figure 9) allows the user to get more detail on all support cases pertaining to their account. It allows them to view the status of the support case, as well as the task notes associated with each task.

Figure 8 – Project/Support View Screen

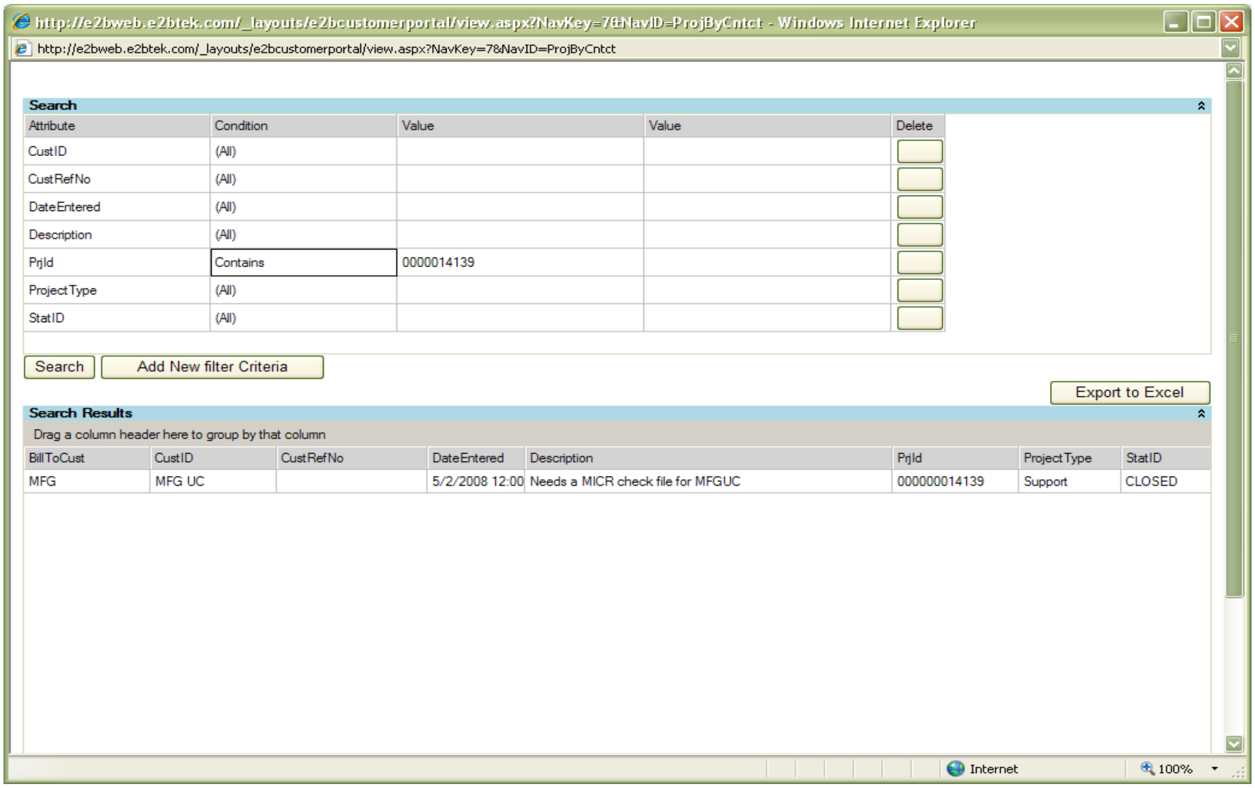
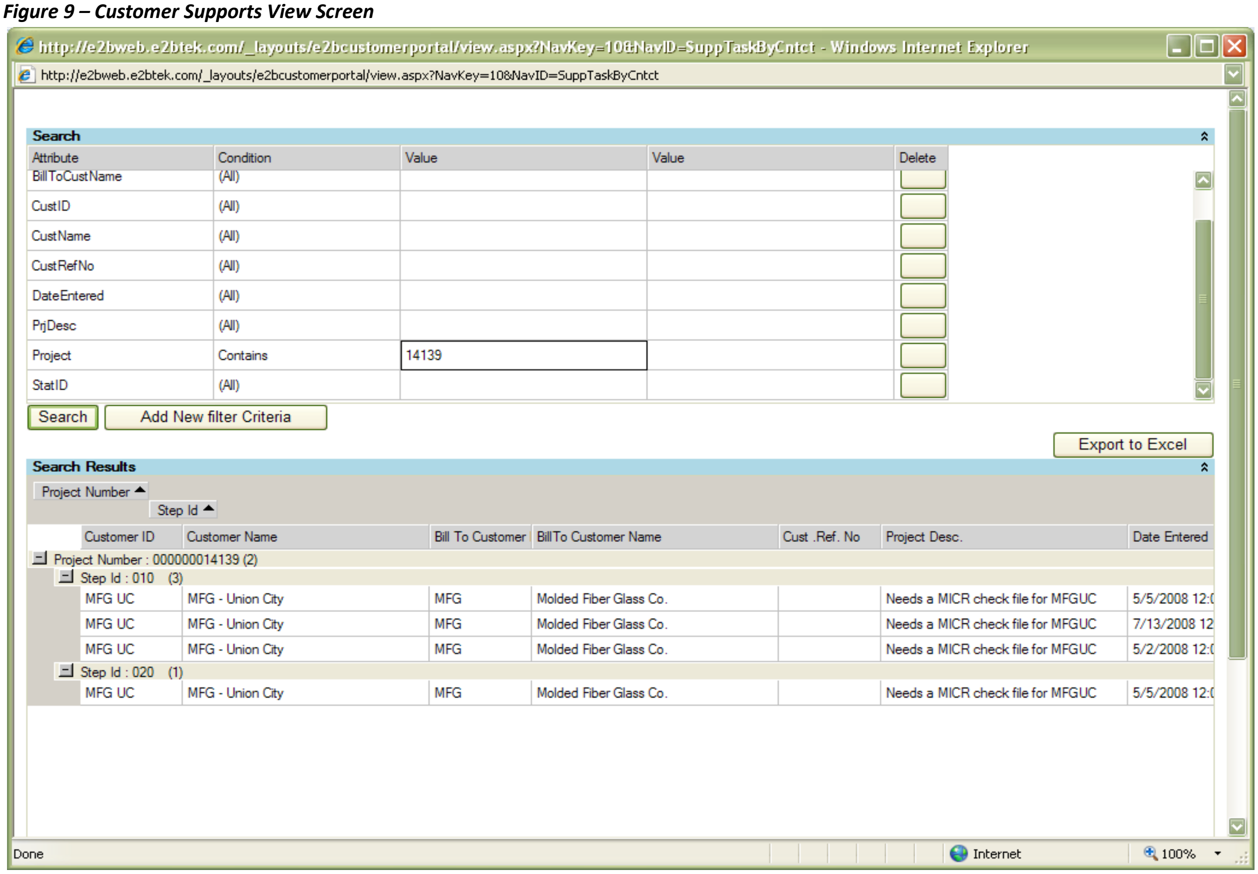


Figure 9 – Customer Supports View Screen



The “Downloads & Docs” task (figure 10) can also be found under the Support tab. Due to the vast amount of development projects that we provide for our customers, this area is where we place our customization installers for download by our customers.

Figure 10 – Downloads & Docs View found under the Support Tab