CTI

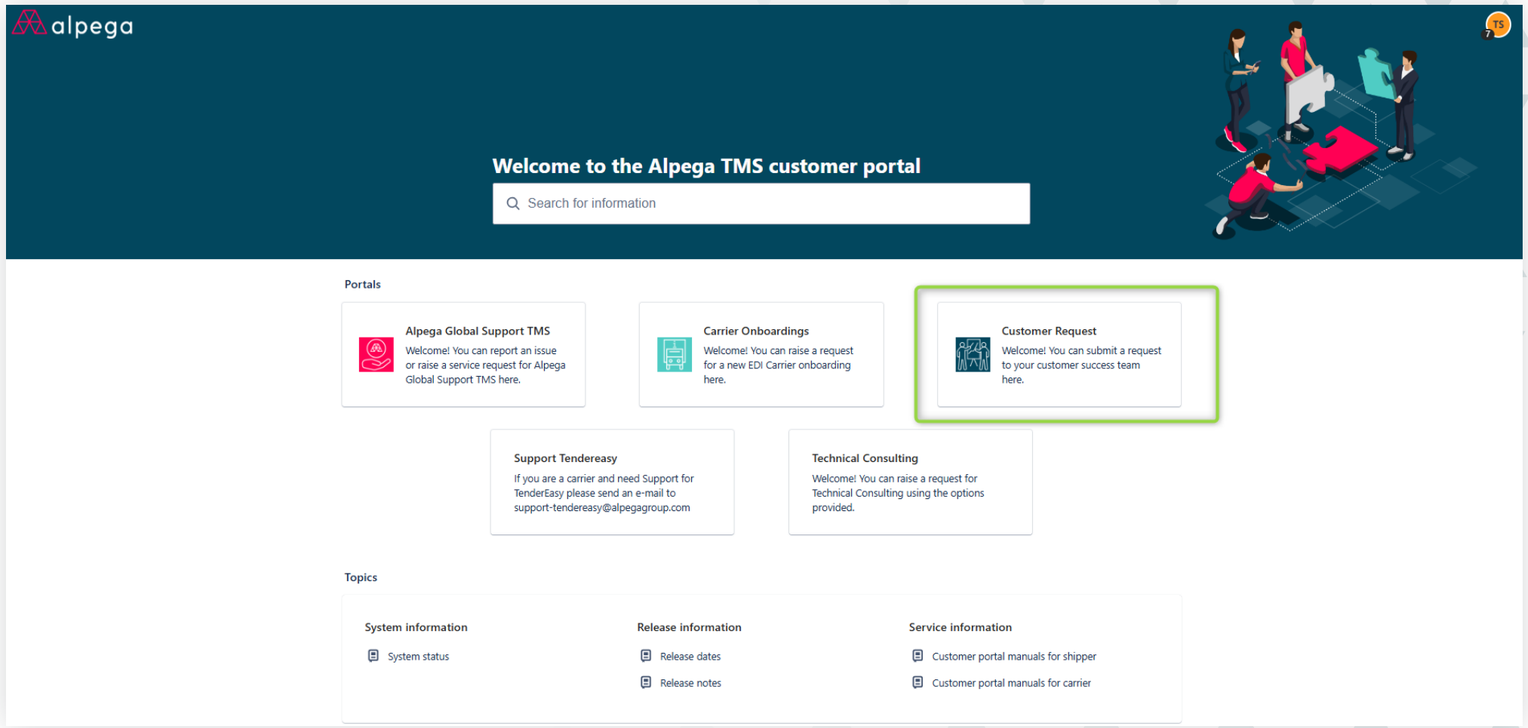
This guide explains how to create a request for your Customer Success Team, using the Alpega JIRA Service Management portal.

alpega

PROJECT SELECTION

To begin, open the **Customer Portal** in your browser at alpegagroup.atlassian.net and log in with your registered email address.

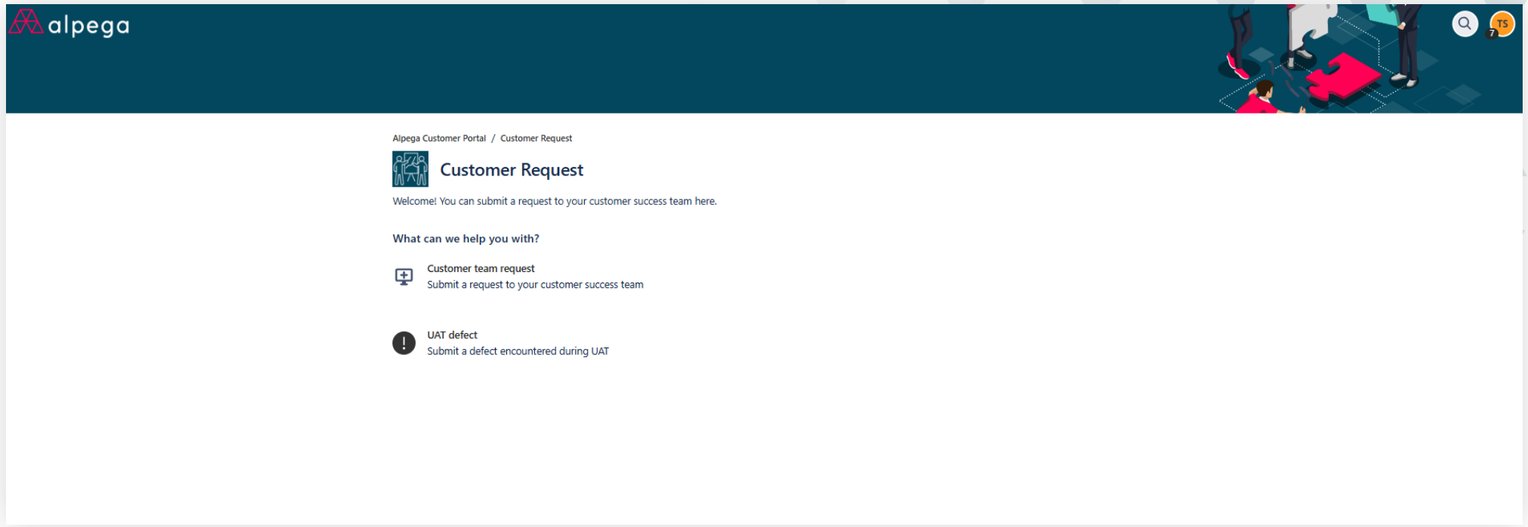
Once you've successfully logged in, click on the ***'Alpega Customer Request'*** portal to proceed.



REQUEST TYPE

First, you'll select your Ticket Type:

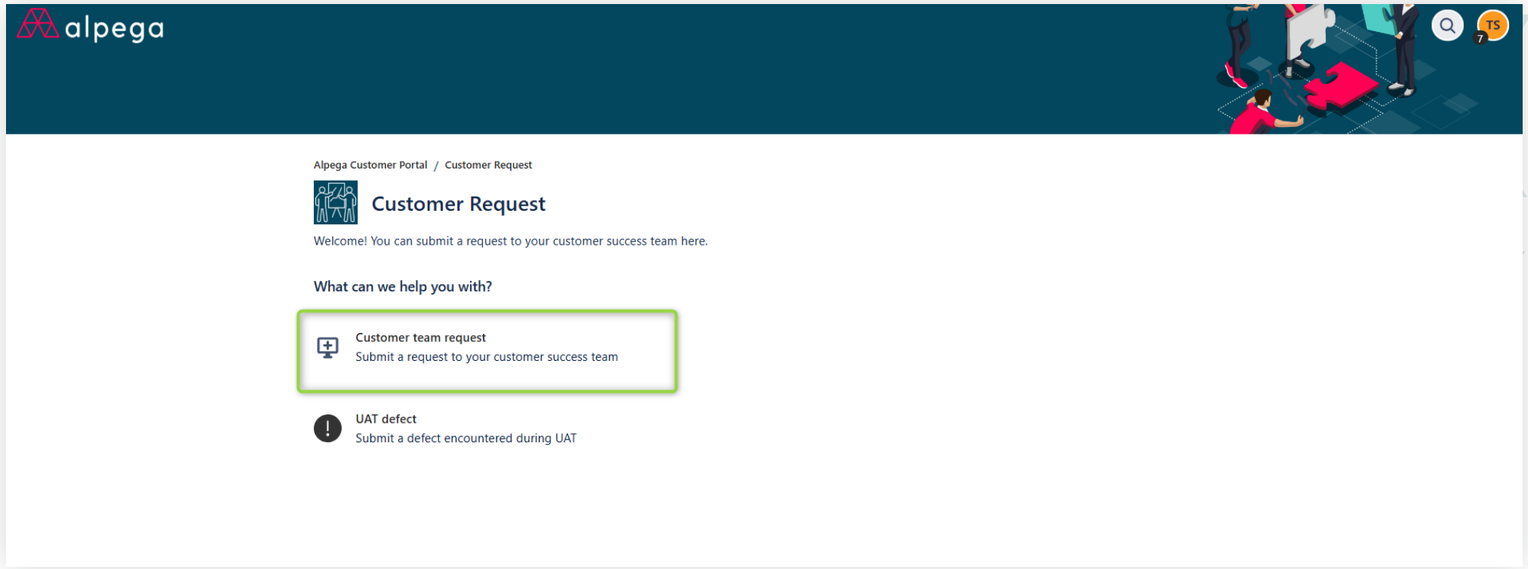
- **Customer team request:** Select this to submit a request to your dedicated customer success team.
- **UAT defect:** Select this option if you need to submit a defect that was encountered during User Acceptance Testing (UAT).



CUSTOMER TEAM REQUEST

Upon selecting ***'Customer team request'***, the form will expand to display several fields, many of which are marked with an asterisk (*) indicating they are required.

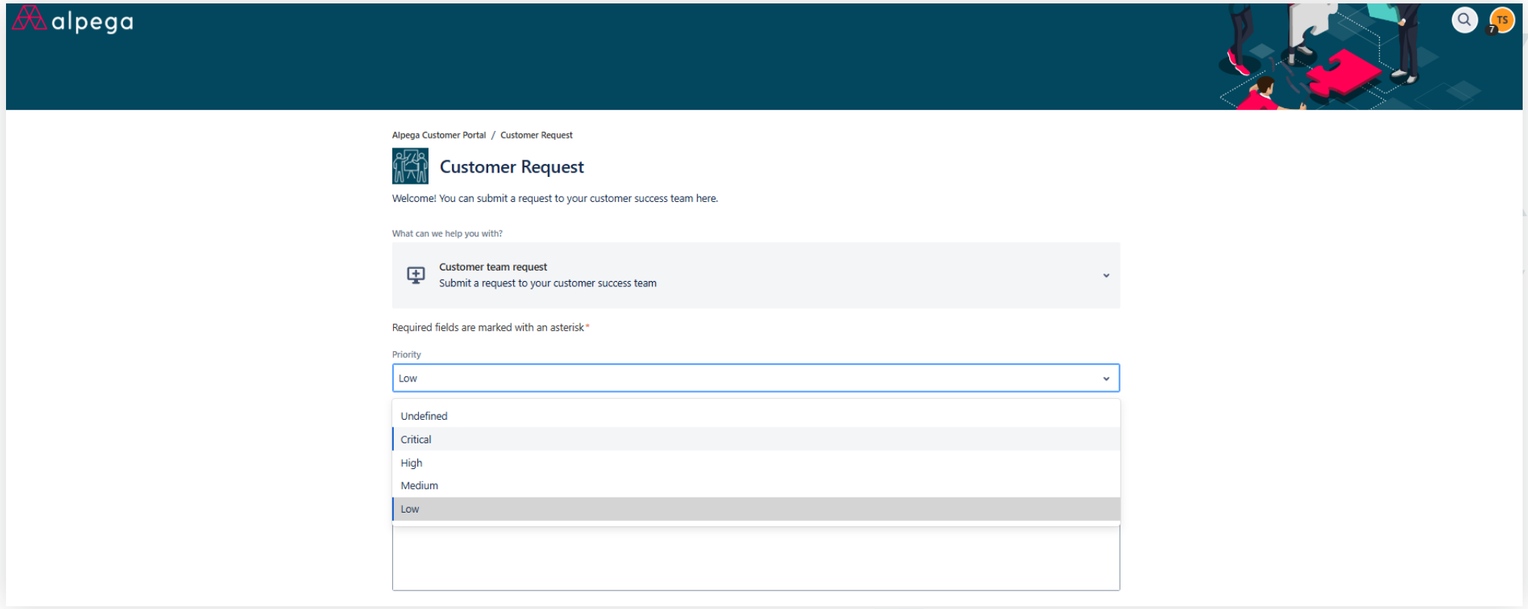
While these are required, we strongly encourage you to utilize all available fields to provide comprehensive information.



PRIORITY

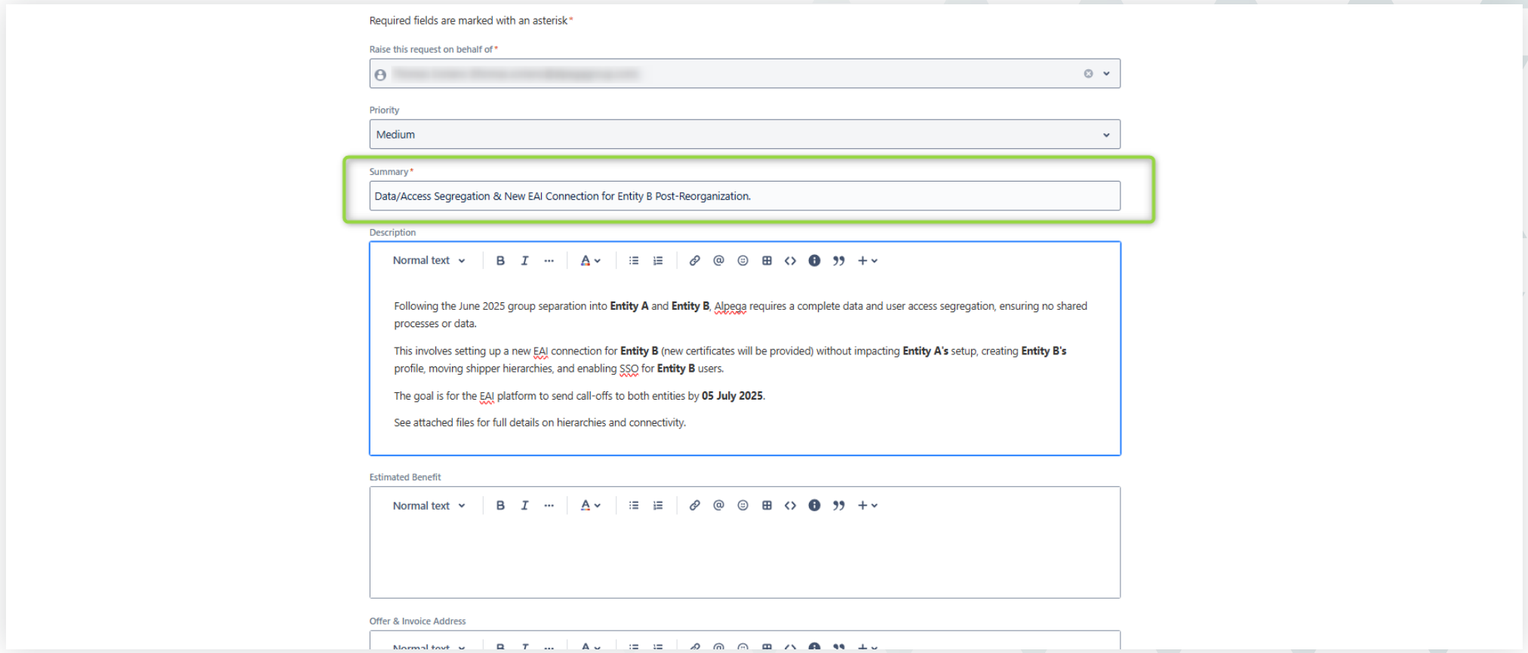
Next, set your ticket's ***'Priority'*** – this guides our team based on your request's business importance.

- **Critical**: Urgent and essential change needed to meet legal, regulatory or business-critical deadlines. Delays cause major risk or loss.
- **High**: Important improvement with broad impact. Supports key projects or efficiency gains. Time-sensitive but not urgent.
- **Medium**: Useful enhancement for specific teams or workflows. Not urgent.
- **Low**: Minor adaptation or idea with limited impact. No urgency. Can be considered for future planning.



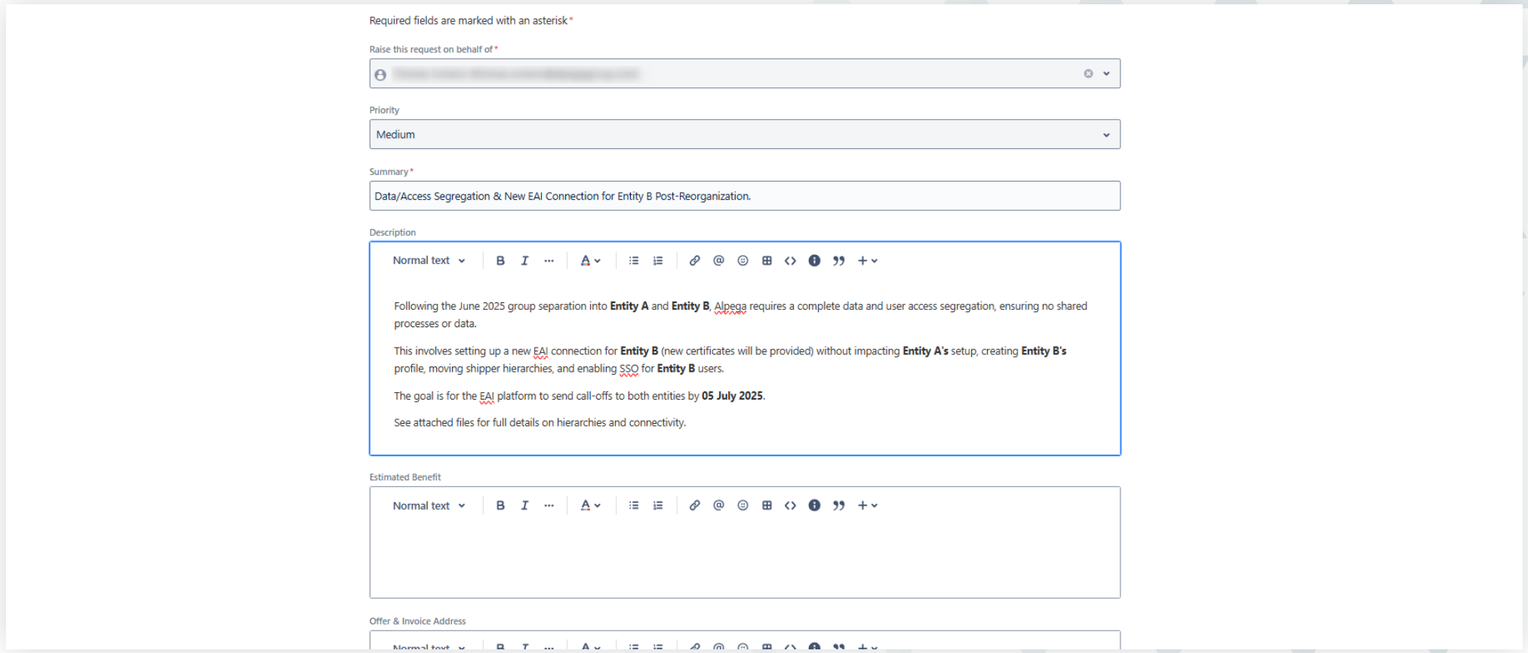
SUMMARY

Next, you'll provide a concise **Summary** for your ticket. This field is often labeled as ***'What can we help you with?'*** and serves as the title or a brief description of your request. Aim for clarity so the Customer team can quickly understand the essence of your issue.



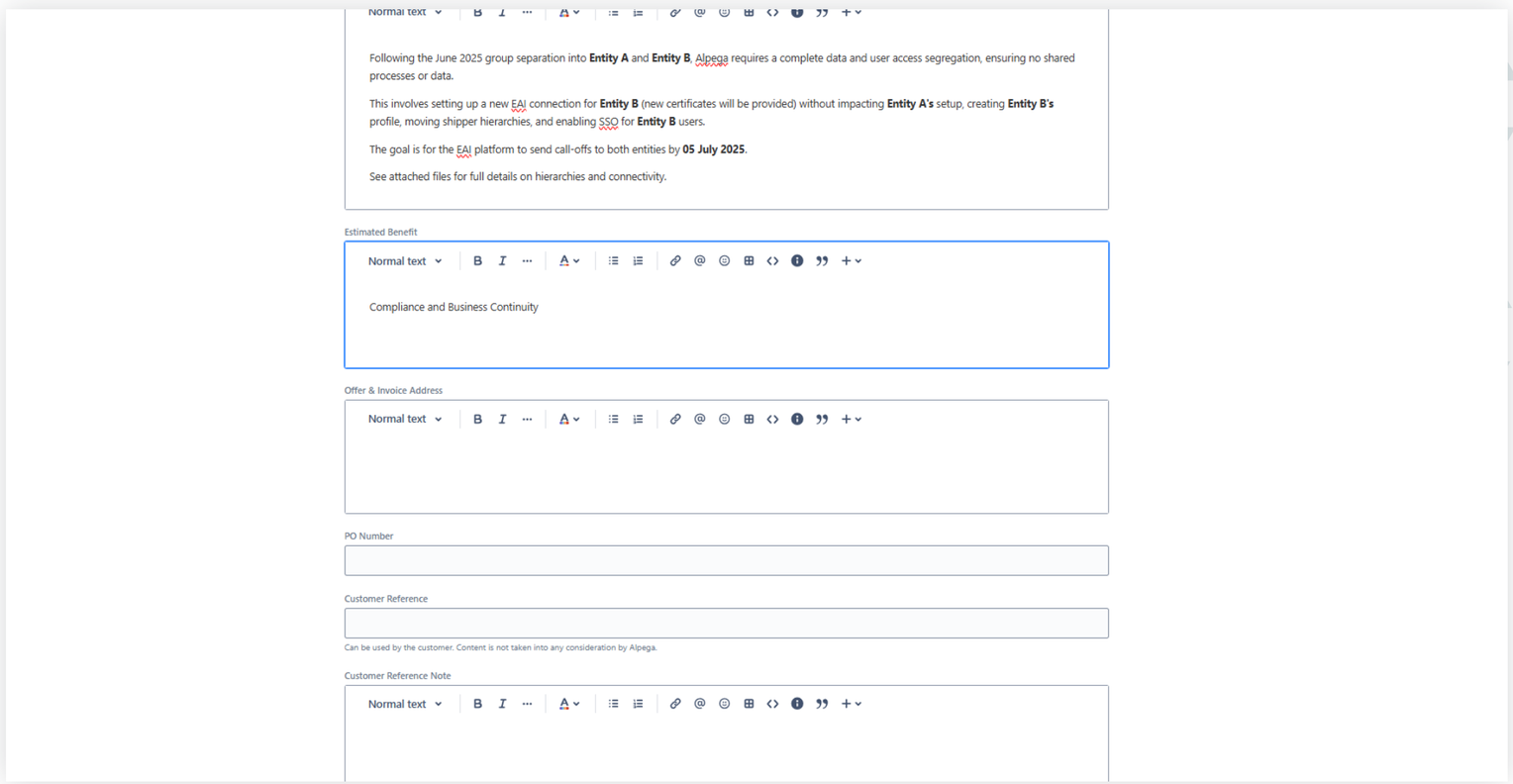
DESCRIPTION

Please provide a detailed explanation of your request, ensuring our **Customer Success Team** has all the necessary information to assist you effectively. The more specific you are, the faster we can help.



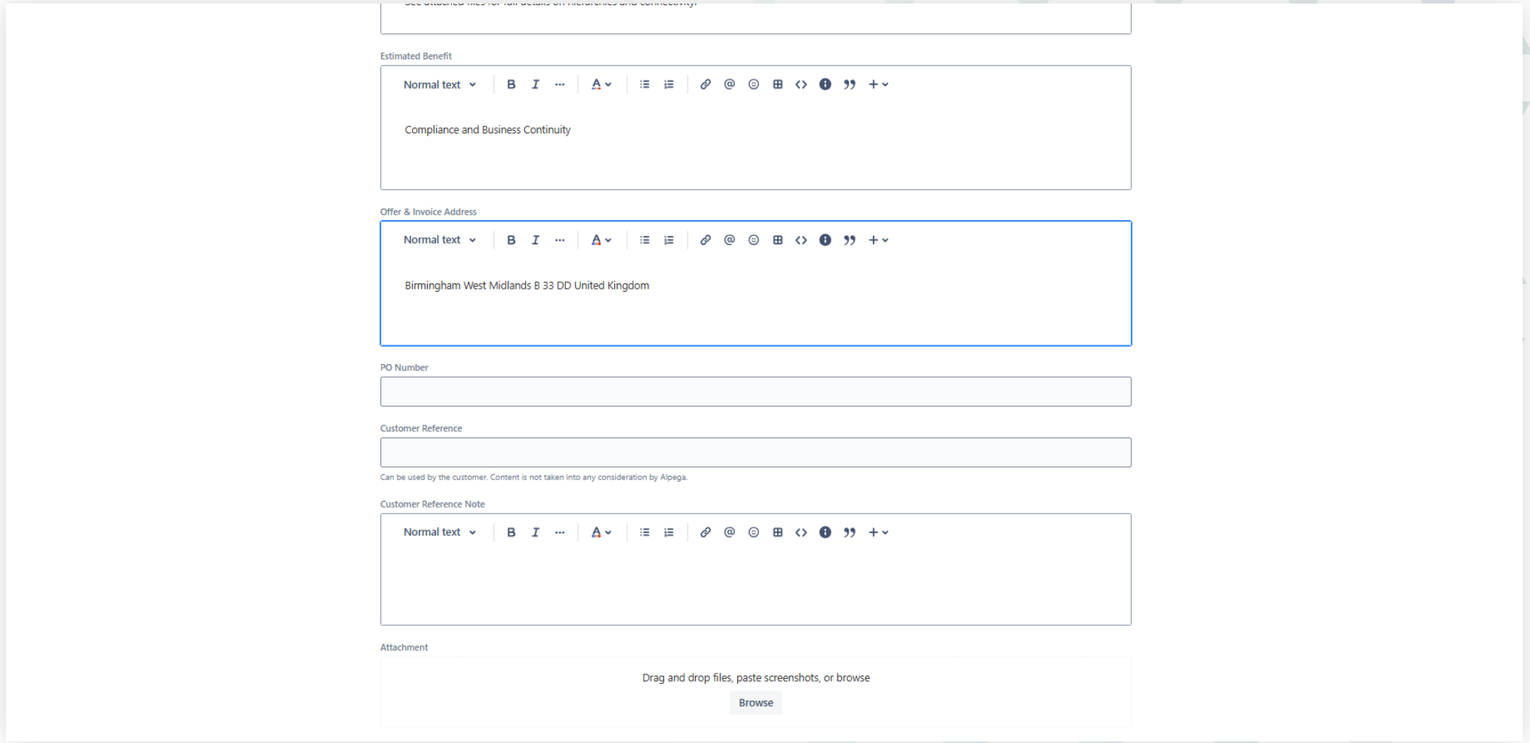
ADDITIONAL FIELDS

- **Estimated Benefit:** Describe what the client will gain or benefit from this request.



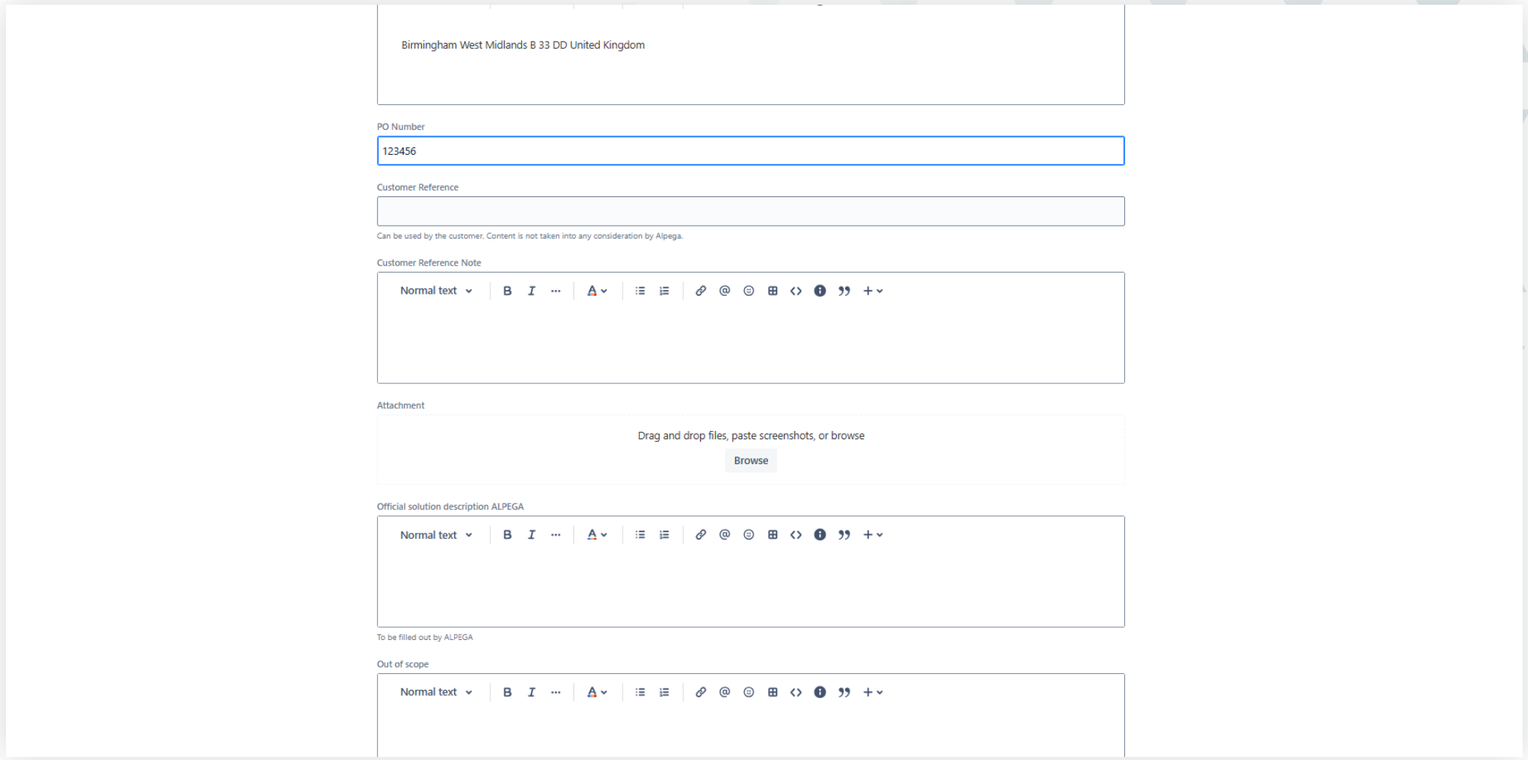
ADDITIONAL FIELDS

- **Offer & Invoice Address:** Provide the address where Alpega can send the offer linked to this request, including price and conditions.



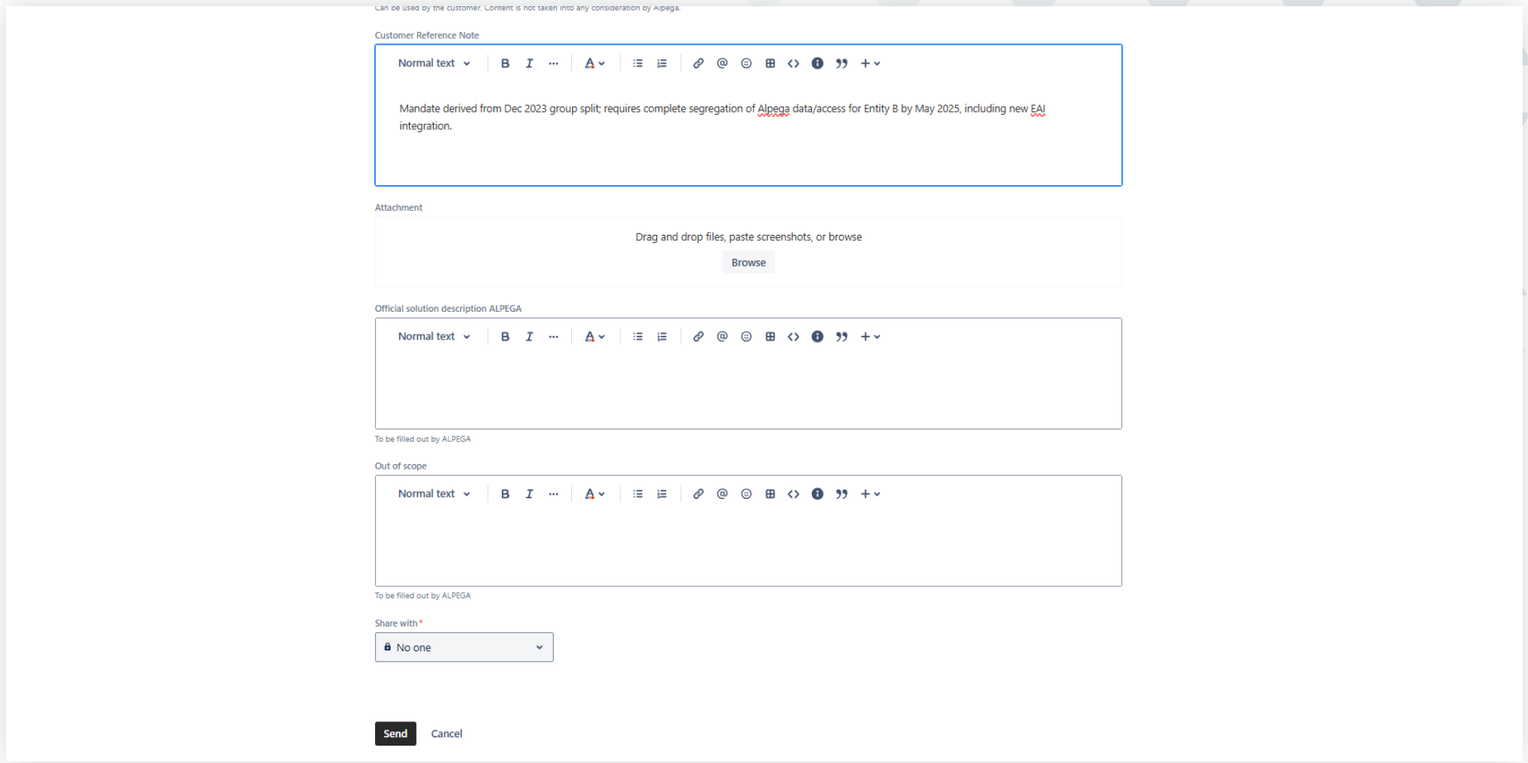
ADDITIONAL FIELDS

- **PO Number:** Enter the Purchase Order number, which is used when you buy something and then link this ID to transportation.



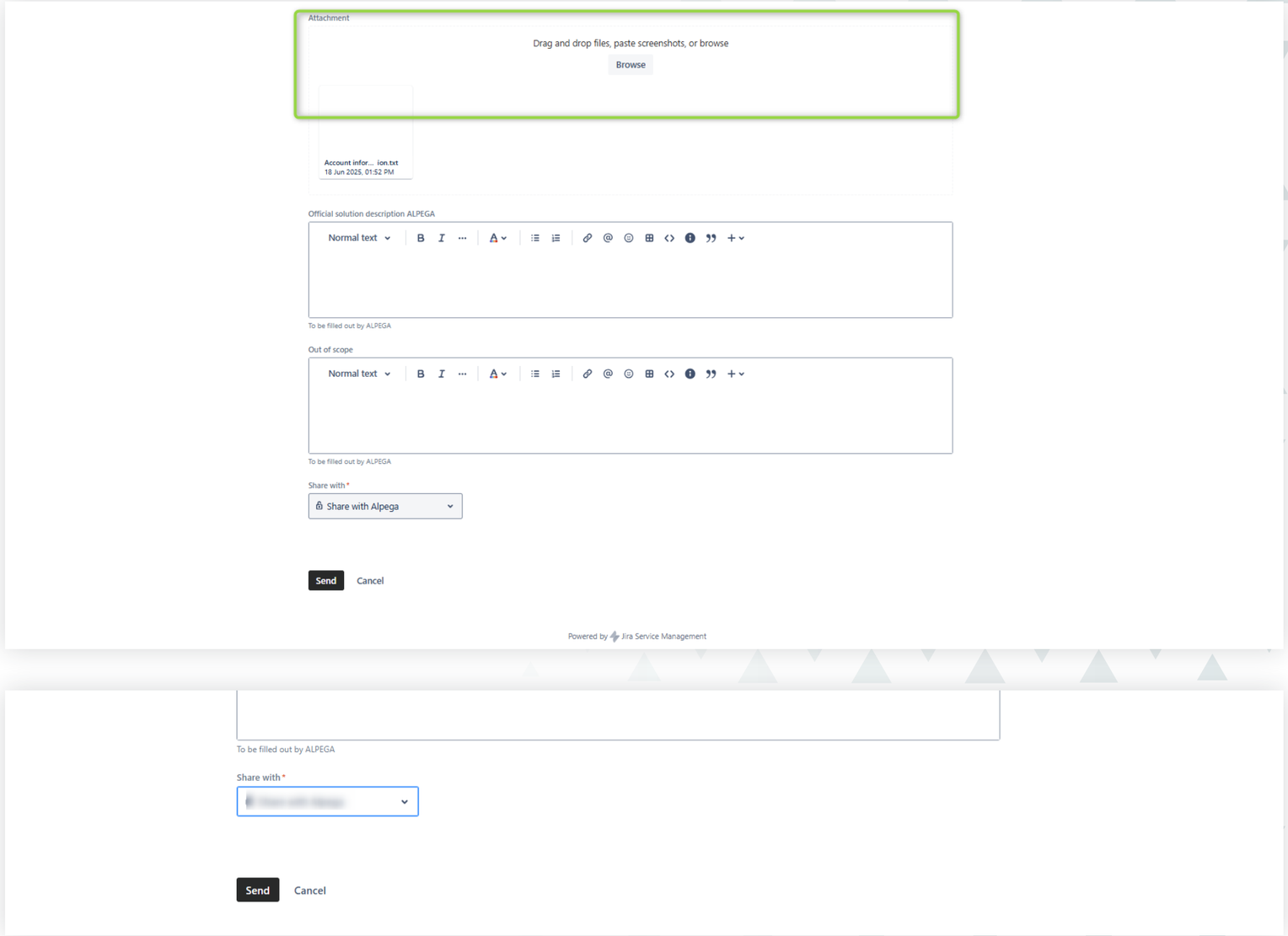
ADDITIONAL FIELDS

- **Customer Reference:** This field is available for your reference; however, the content entered here is *“not taken into any consideration by Alpega”*.
- **Customer Reference Note:** The client can link a note to the request here, similar to the customer reference field.



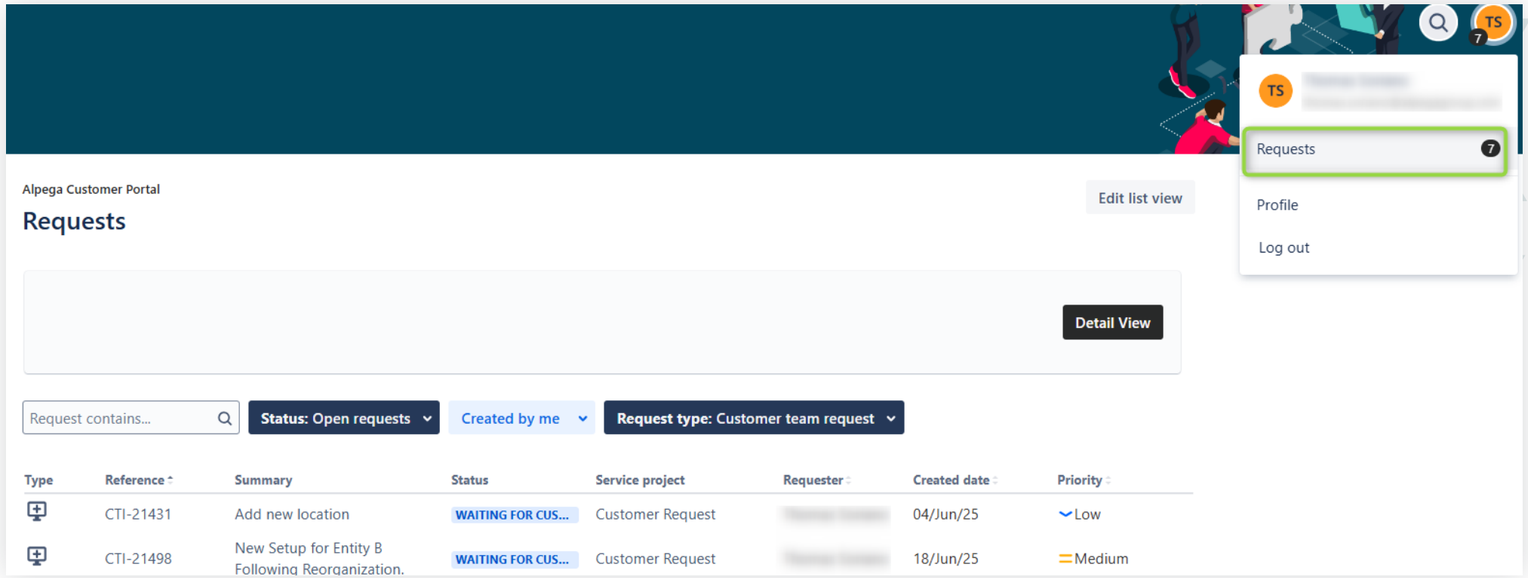
ATTACHMENTS

- **Attachment:** To include supporting documents or screenshots, you can drag and drop files, paste screenshots directly, or use the ***'Browse'*** option.
- **Share with:** In the ***'Share with'*** field, select your own organization. This ensures your ticket is visible to your organization's support contacts and routed correctly for assistance.



REQUEST STATUS

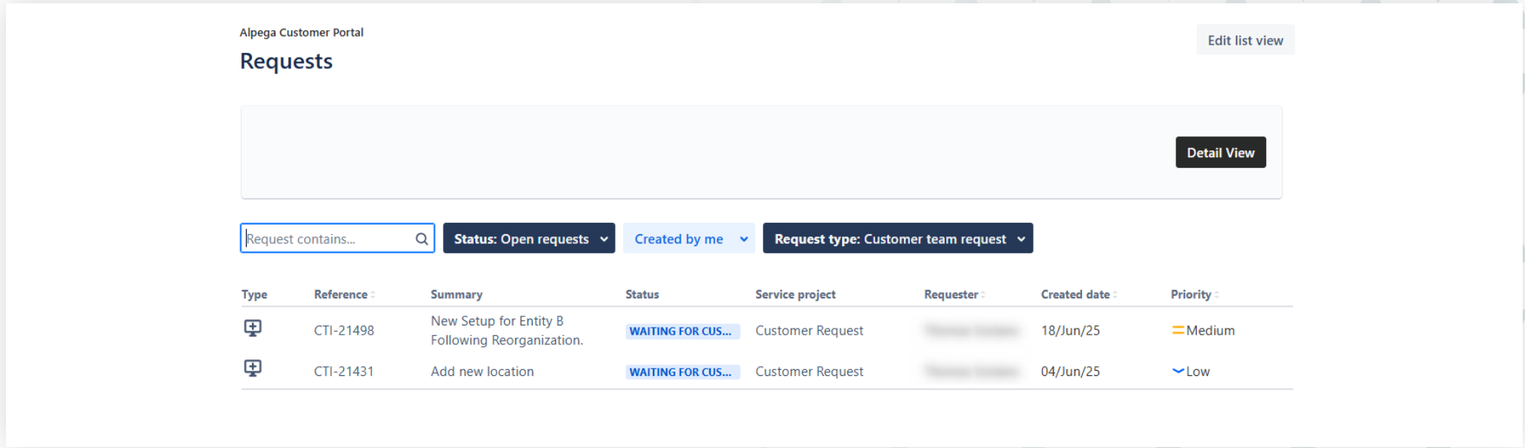
Once you've sent in your request, you'll want to see its progress or review past tickets. To do this, simply click on the ***'Requests'*** section, usually found at the top right of your portal. This brings you to your ***'Ticket Overview'*** – a list of all your requests.

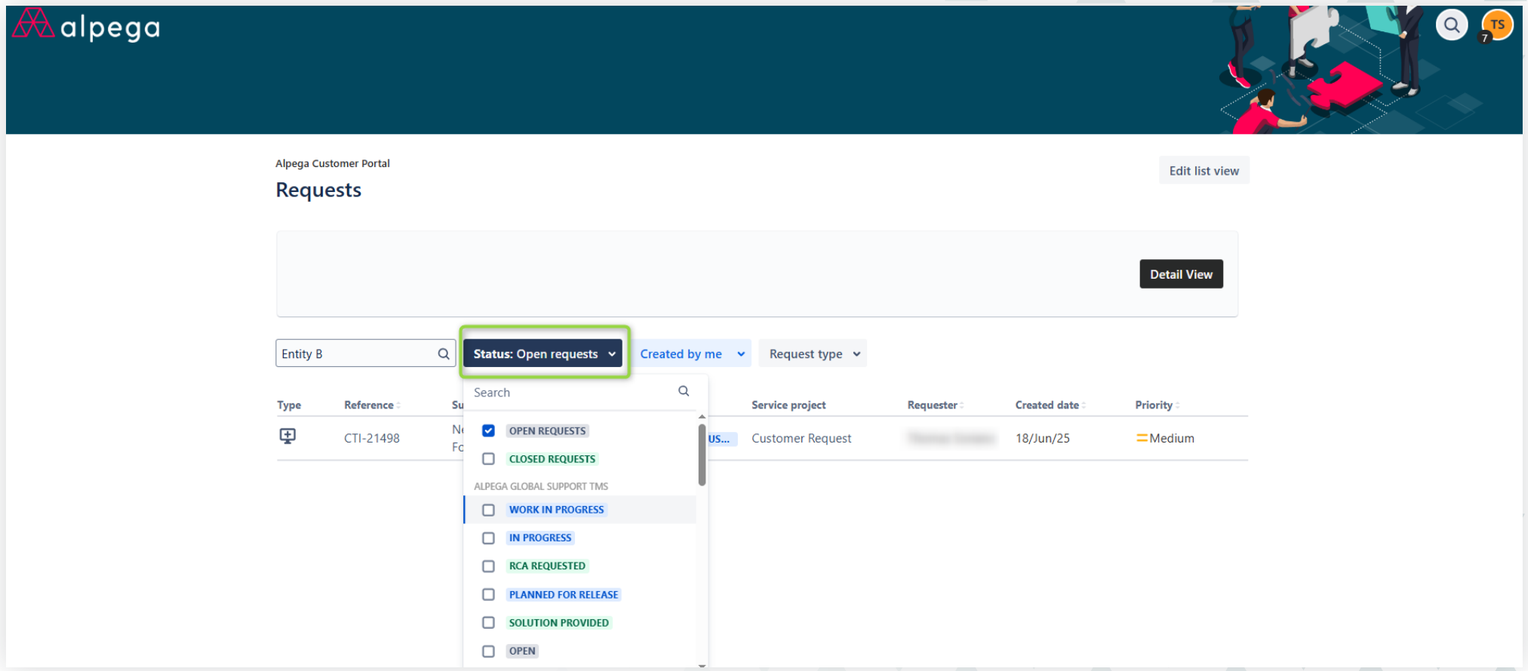


REQUEST FILTERS

Need to find a specific request? Use the ***'Full text search'*** bar. You can type in words from the summary or any content within the request to quickly locate it.

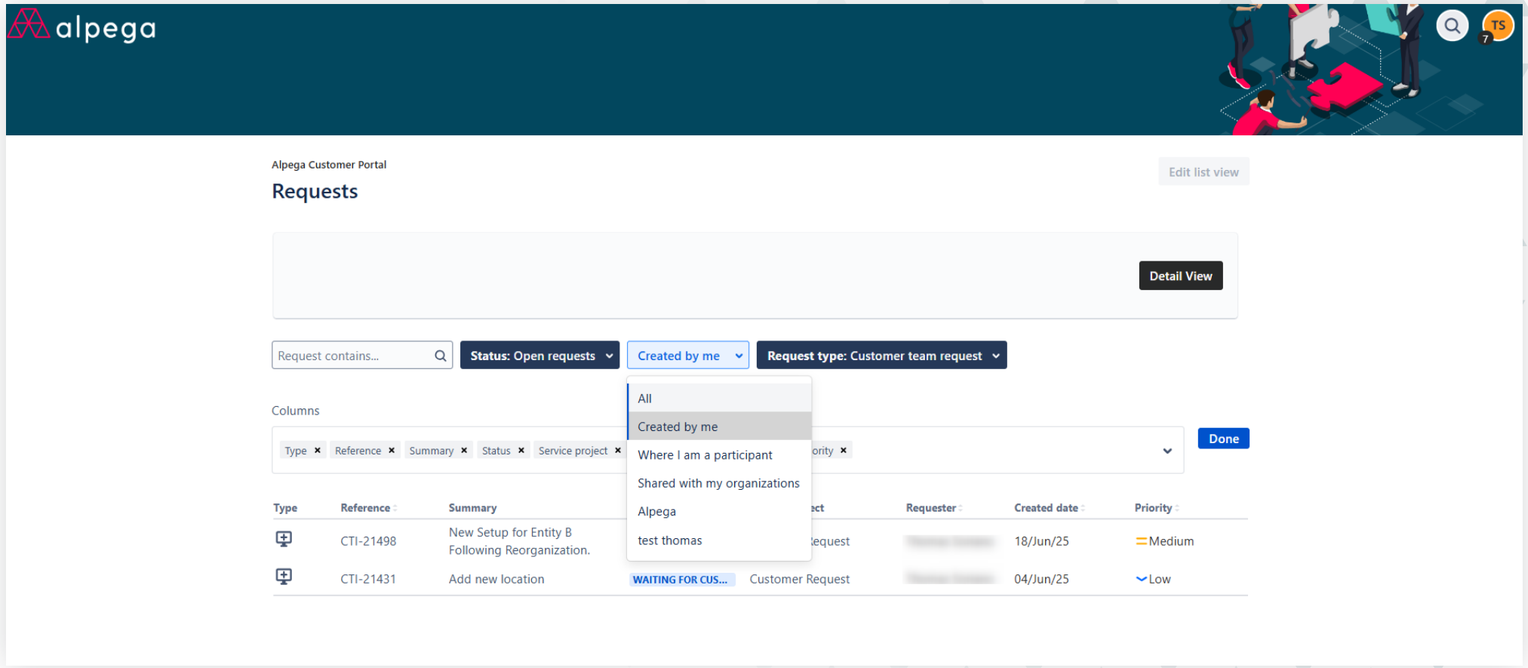
- **Filter by Status:** This lets you see tickets that are *'Open'*, *'Closed'*, *'In progress'*, or any other specific status.





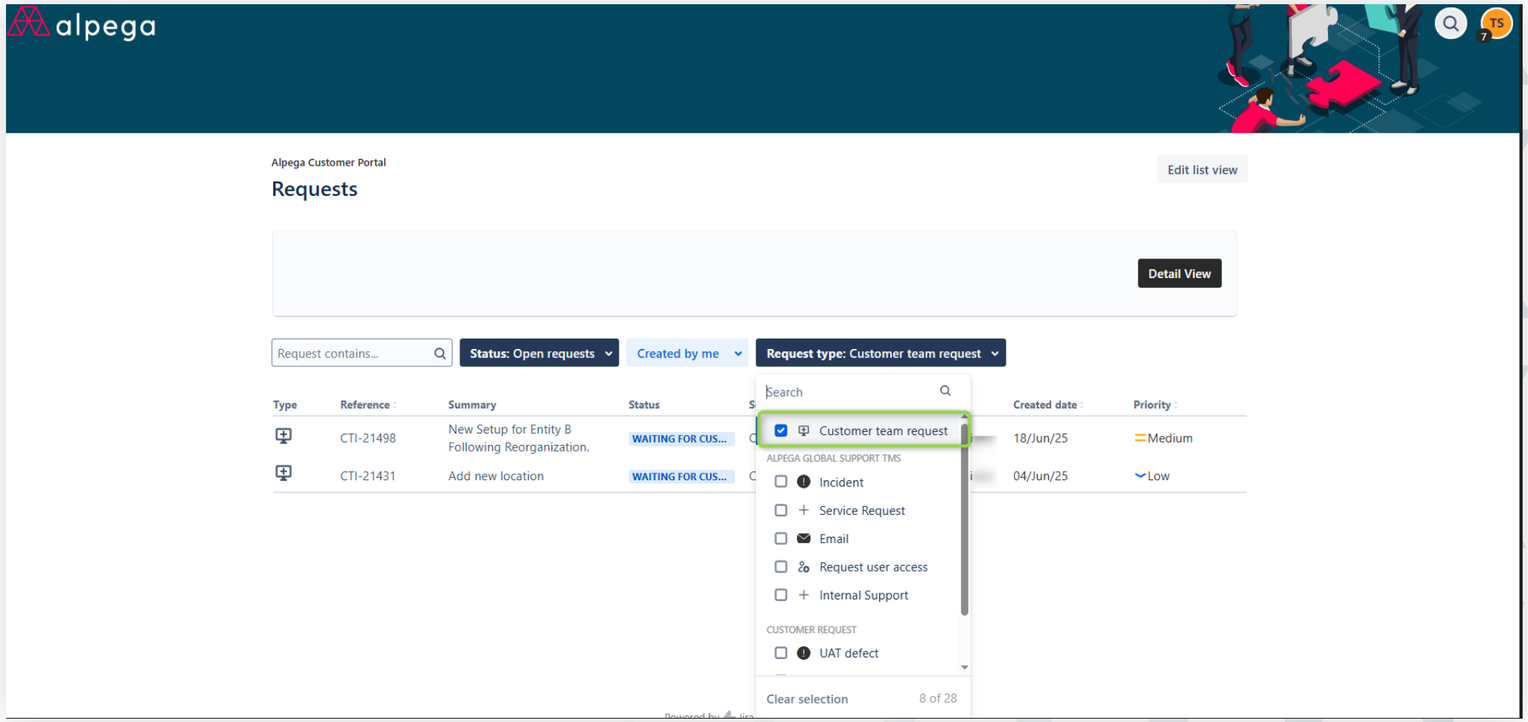
REQUEST FILTERS

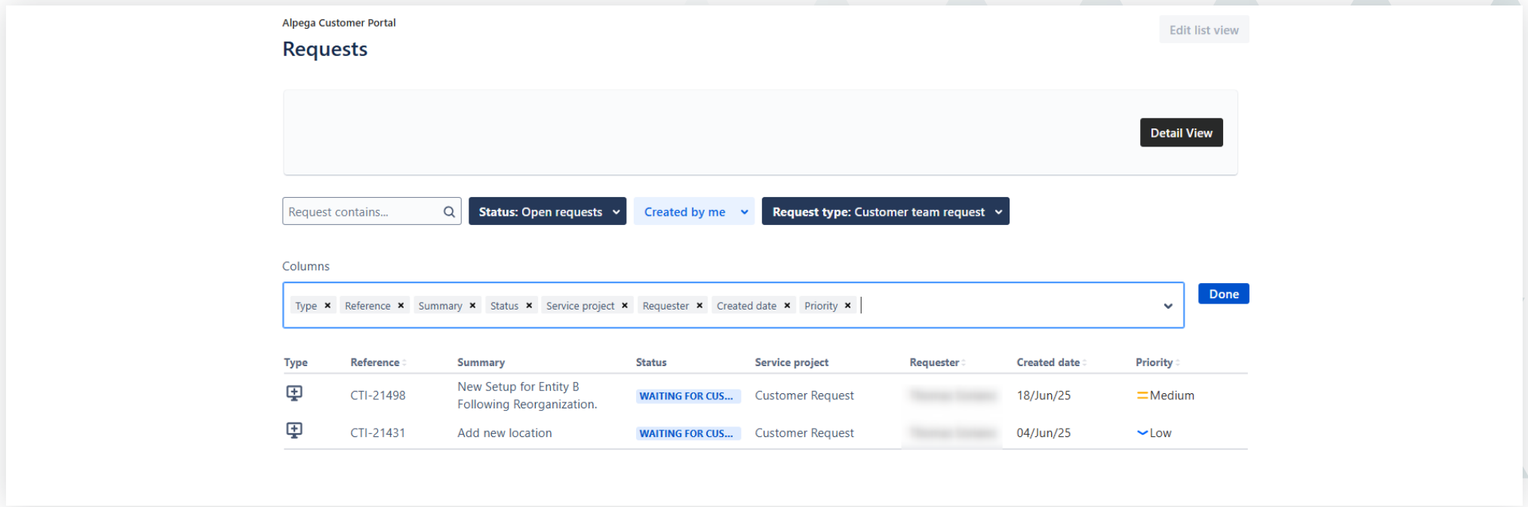
- **Filter by Creator:** Here, you can choose to see requests ***'Created by me'*** – just your own tickets – or those 'Created by anyone' in your organization, or even tickets where you're just a ***'participant'***.



REQUEST FILTERS

To customize your list's details, click ***'Manage columns'***. This lets you add or remove information fields, creating a personalized ticket view. After applying any filters, the main area dynamically updates. This ***'Filter results'*** section then clearly displays only the tickets matching your criteria.





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