MERIT SOLUTIONS

DYNAMICS 365 CUSTOMER SUPPORT

CUSTOMER SUPPORT PORTAL MANUAL

Contents

1. Introduction

Welcome to Merit Support!

To use the Customer Portal in the best possible manner, please follow the instructions provided in this manual. The scope of the manual will cover the steps from registering your account or signing into an existing account, opening a Case with Merit Support right to a successful Case resolution.

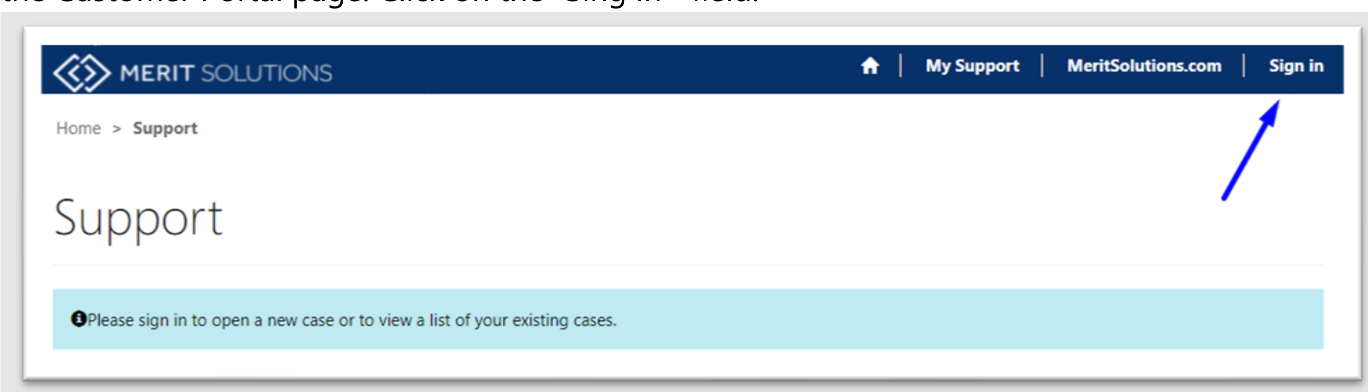
The first step is to follow the link below to the Merit Customer Portal Home Page.

https://meritforcustomers.microsoftcrmportals.com/

You can also use the Customer Portal from your mobile phone browser.

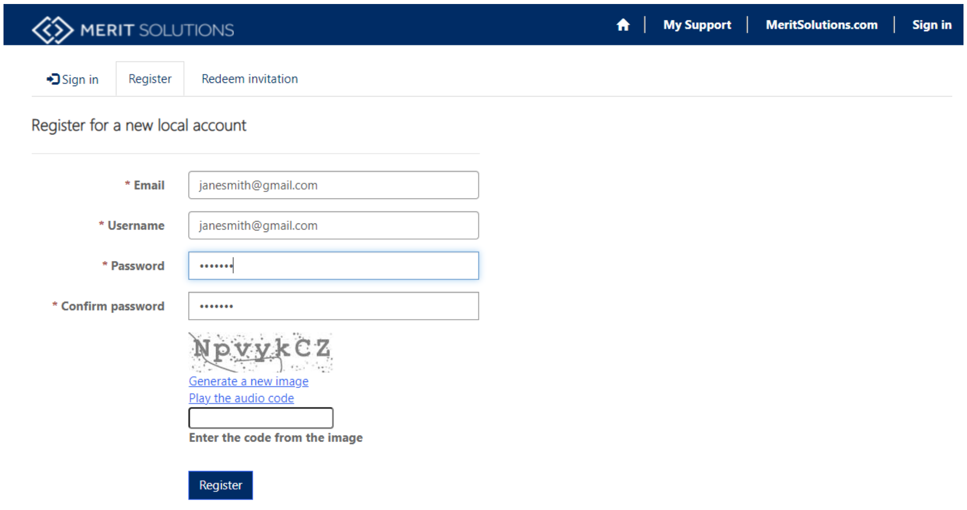
2. How to sign in to the Customer Portal?

Please follow a few easy steps to register a new account or log into your existing account on the Customer Portal page. Click on the "Sing in " field.

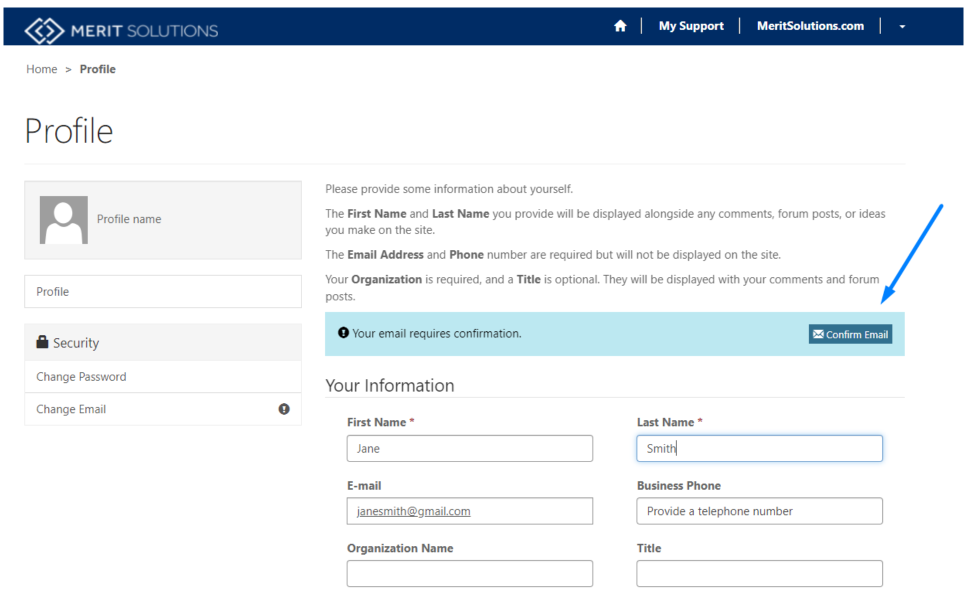


Once there, you will be able to use your credentials to log into your account, register as a new user, or use the invitation code provided by Merit Support.

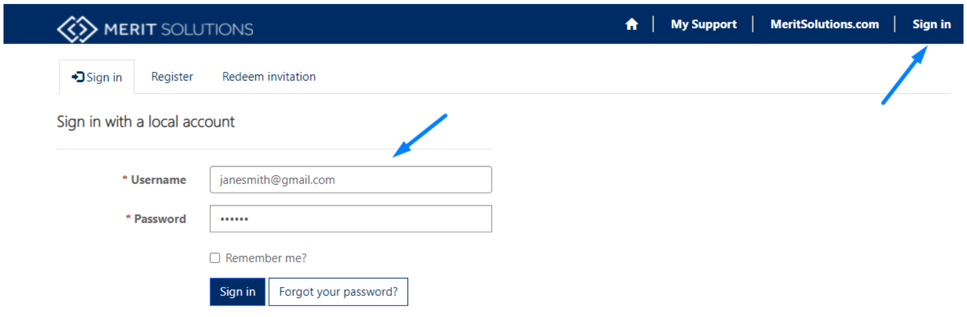
To register your account, please click on the "Register" button. Use your email as a Username, when done, fill out the mandatory fields click on the "Register" button to save the details. When saved, it will open a page where you should set your First and Last Name and scroll down to the bottom of the page and click on the "Update" button to confirm.



The system will also ask you to confirm your email address. Once the email address is confirmed, Merit team will receive a request to activate your account. Once the account is activated, you will be able to create cases.

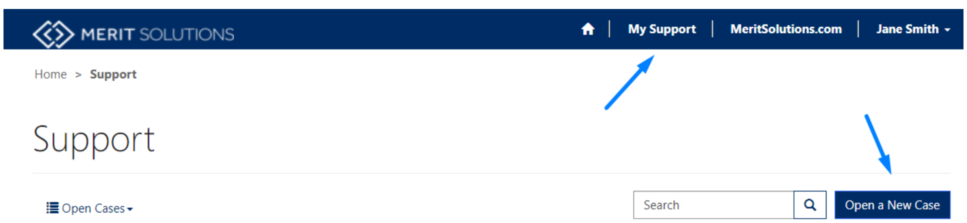


If you already have an account, please click on the “Sign in” button on the top right part of the screen. Set your password and username, which is the email address you used to register your account. Click the on the “Sign in” button.



Once you are logged into the system, your name will be visible in the top right corner of the Home page.

Please click on the “My Support” tab which allows you to see any previously open cases as well as a tab that allows you to submit a new case.



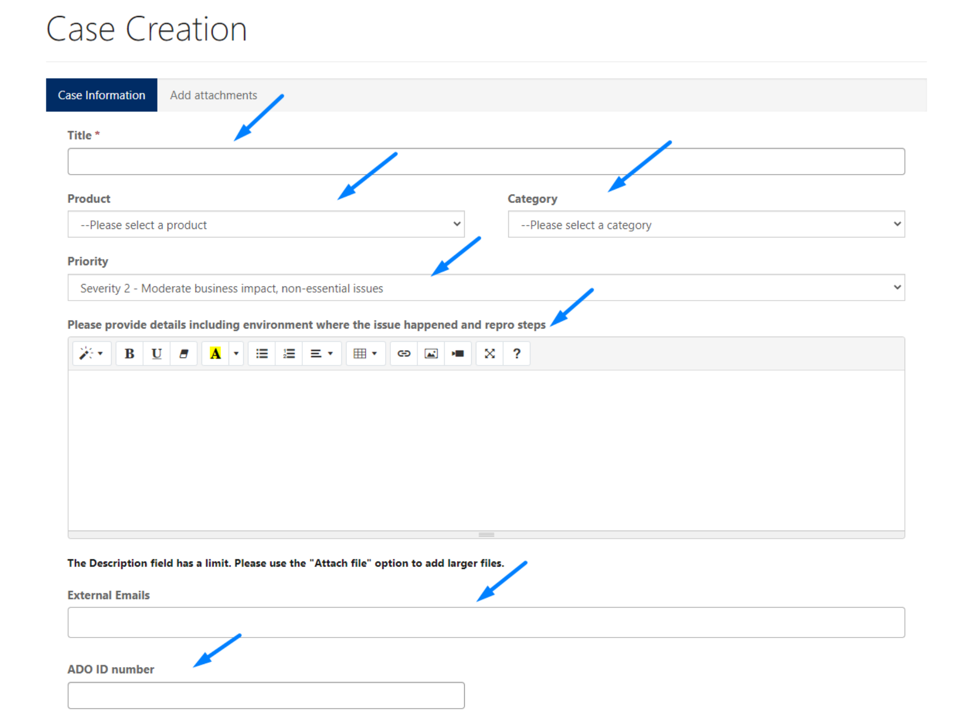
3. How to open a New Case?

If you would like to open a new case with Merit Support, please click on “Open a New Case” which leads you to the “Case Creation” page. Here, you can add the Title, Product, Category, Case Priority, provide Description, add ADO ID number and add External Email watchlist.

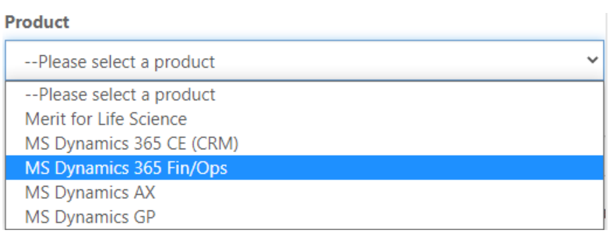
In the “Title” field please provide a brief explanation of the issue or question you have. Choose the Product and Category from the drop-down menu and follow the guidelines about choosing the correct Priority.

In the “Description” field, describe the issue, tell us in which environment issue happened and what are the repro steps to recreate the issue, all of which will enable us to address your issue in the best possible manner.

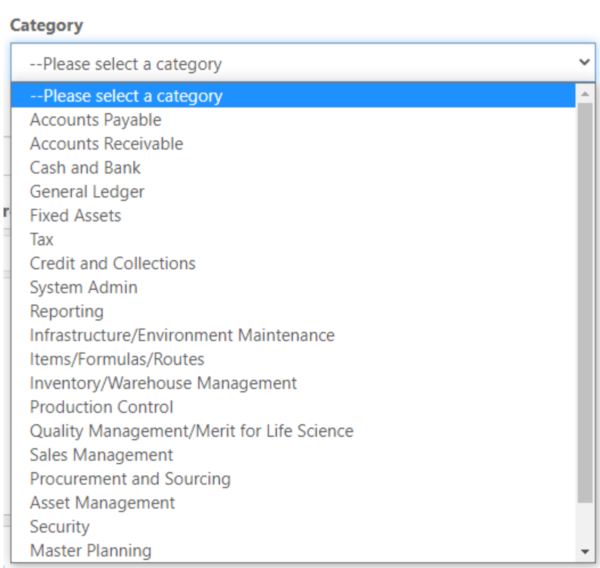
You can also add email addresses in the “External Emails” field to include someone in the watchlist of the case and ADO ID number if you are tracking issues in Azure DevOps.



Please choose the Product from the list.

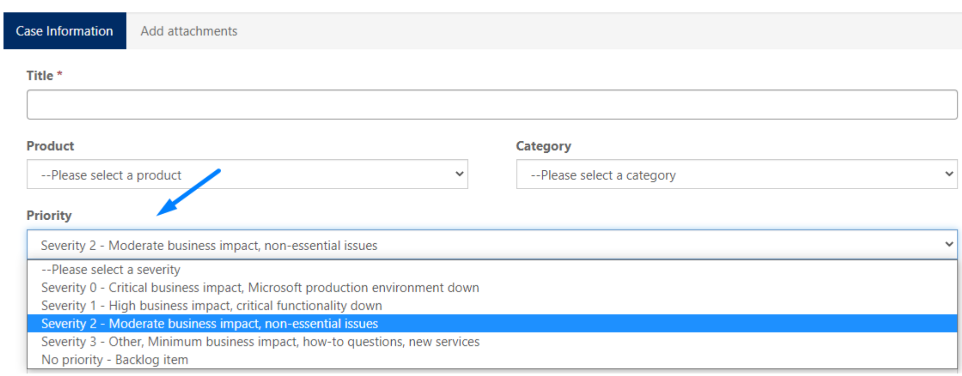


Click on the arrow and select one Category from the list.



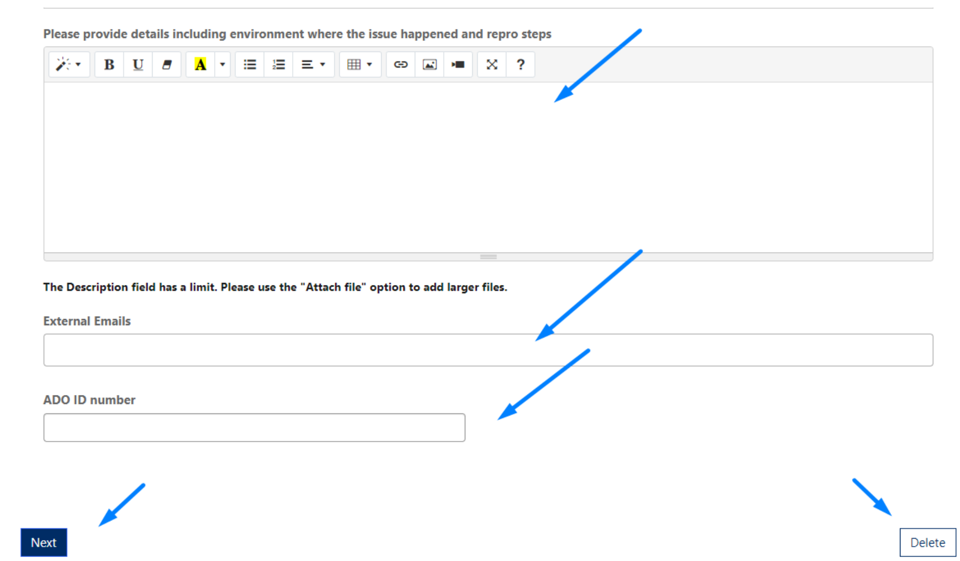
3.1 Case priority

We have five different ticket priorities that can be selected when creating a new case. Starting with the highest priority down to "No priority" cases, please make sure that your case is assigned the correct priority once you create it. This step is important since it will allow your case to be triaged, assigned, and worked on according to the urgency of the matter and service level agreed. If the priority of the case changes, you can always update your case priority accordingly.
Severity 0- Critical business impact, Microsoft production environment down (For example: You cannot access the PROD, UAT or another environment)
Severity 1- High business impact, critical feature down (the issue is preventing you to perform a very important business task, for example, you are unable to process batch order which is delaying production)
Severity 2- Moderate business impact, non-essential issues (there is an issue with the operation, but there is a workaround, for example, you need help with creating 3rd legal entity or need to include D365 attachments in workflow emails)
Severity 3- Minimum business impact, how-to questions, new services (all other issues, for example, you would need assistance in renaming your Azure servers or help to convert a contractor to an employee in the system)
No priority- Backlog item -Cases that will be addressed to be done later so, at the moment, they have no priority, for example, planned enhancements in the next six months.

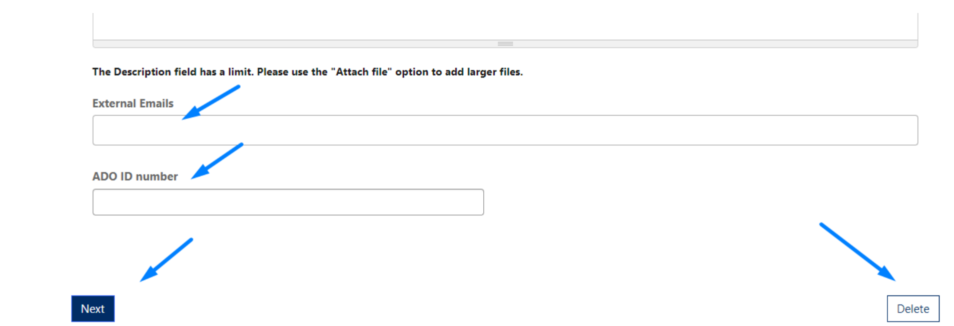


3.2 Case Description

Please add all relevant details and screenshots in the description field: issue details (including environment where the issue happened and repro steps) or enhancement needs. If you have several documents or screenshots, you will be able to add them on the next page.

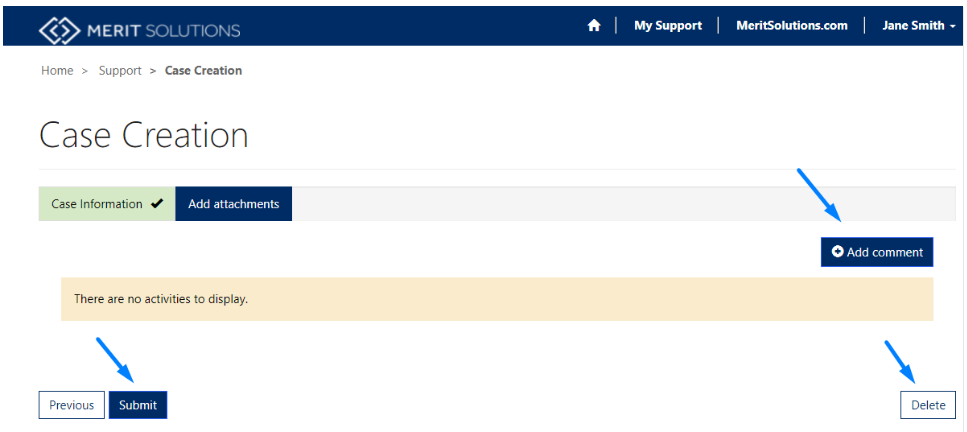


Please add “External emails” watchlist (separate each entry using “Enter”) and ADO ID number if needed.

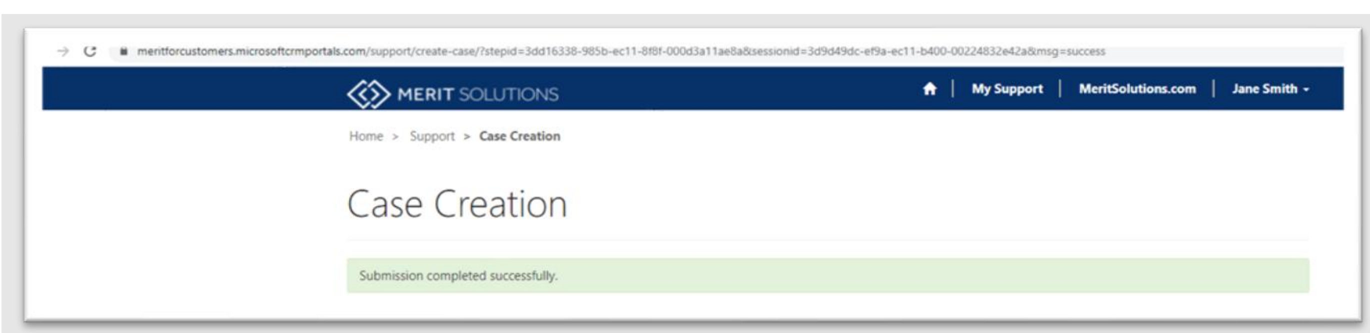


Once the mandatory fields are filled in and you click on “Next” your case has been created.

On the next page, you will see the Add comment,” option. This option allows you to add documents, any larger attachments or additional comments to your case

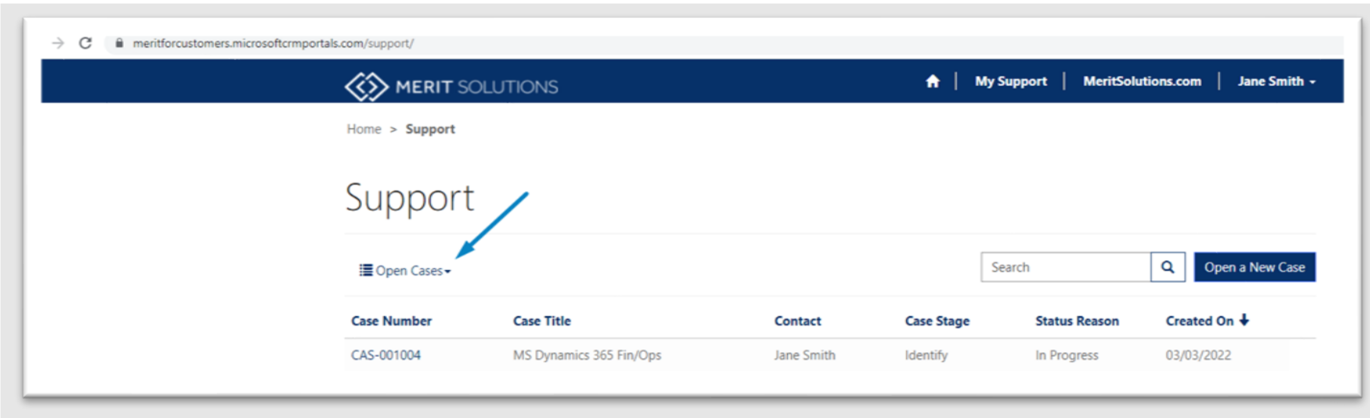


When you click on the “Submit” button, your case will be logged into the system followed by a confirmation message. If you decide not to submit a case at this stage, click on the “Delete” button. You will still receive an email about the case creation, but it will be disregarded in the system as a cancelled case and will not be visible in your open or closed cases.

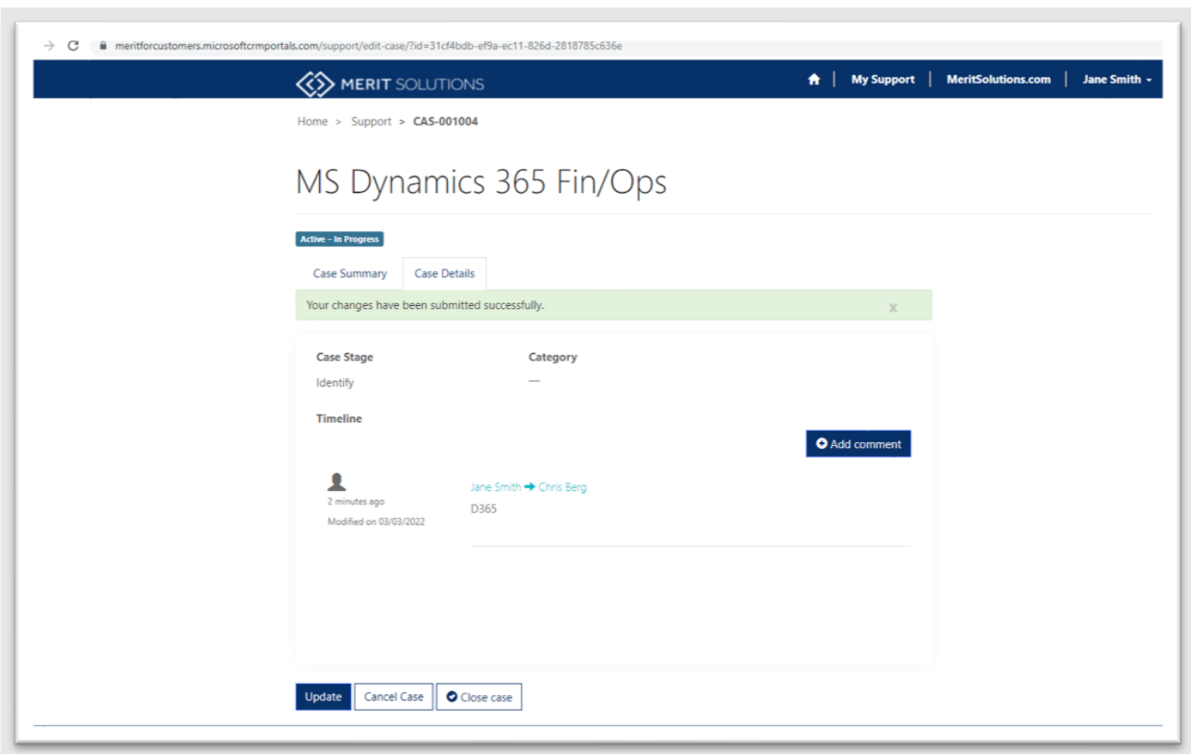


4. Updating an existing Case

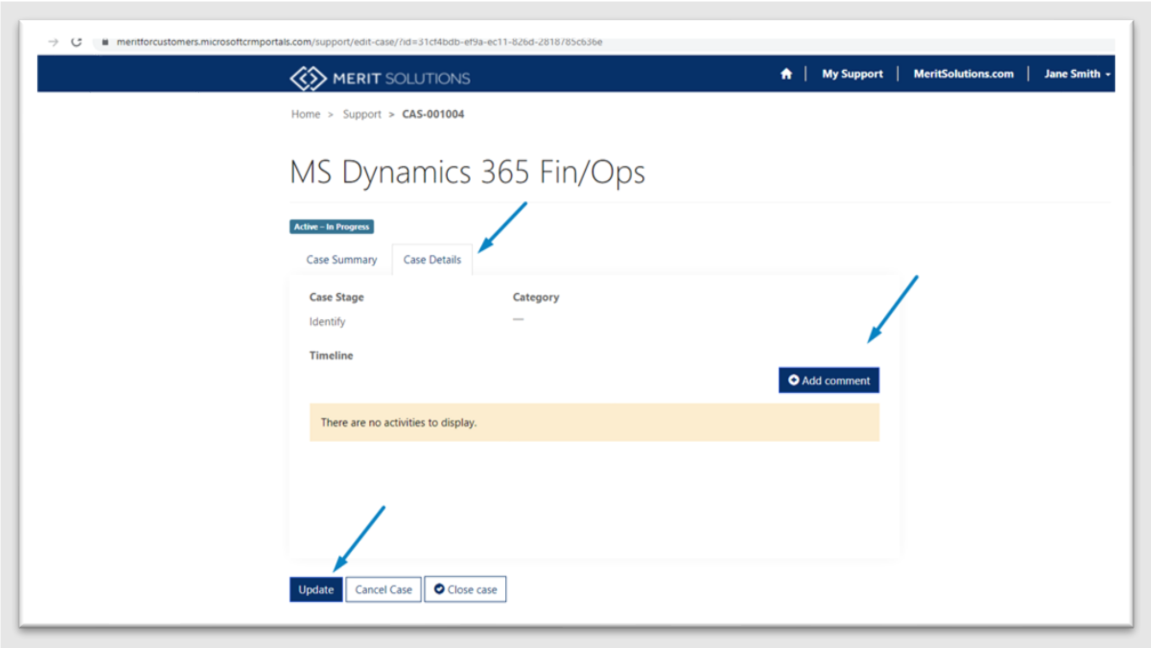
Your case will now be visible on the "My support" page, where you can also see all Open, Closed, or All cases you have submitted so far.

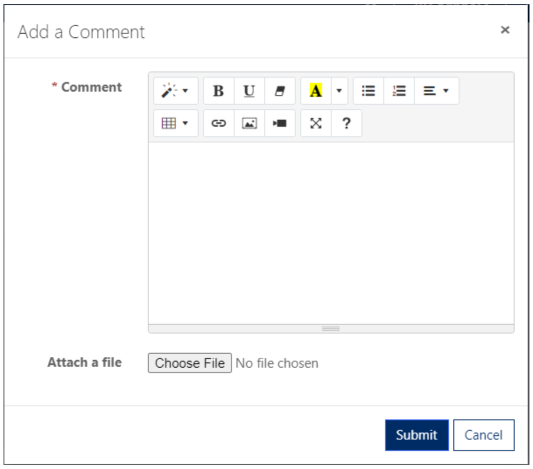


All communication between you and Merit will be visible in the Case Details tab of your case. You will get an email notification when a new comment is added to your case.



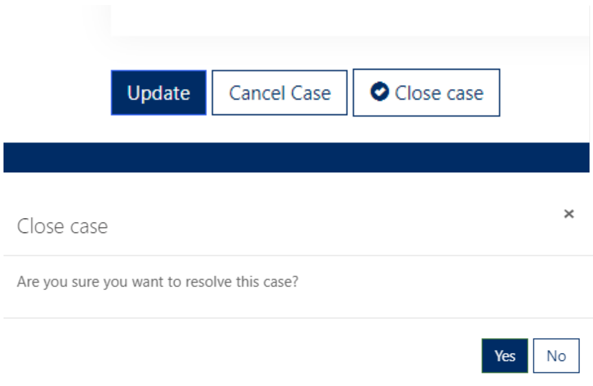
To add a comment to the case, click on "Case details", "Add comment" and here you can write a comment or attach a picture or a file. When done, click on the "Update" button.



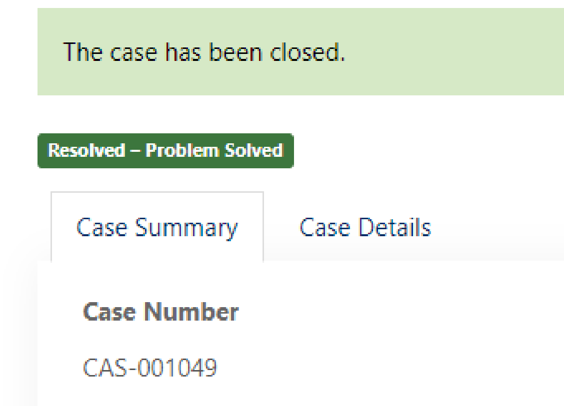


5. Closing the Case

When the issue has been resolved or your question answered, you can proceed with closing the case from the "Case Summary" or the "Case Details" page. Please use the "Cancel" option if the ticket was submitted as duplicate or if its no longer needed.



Successful closing of the case is followed by a message from the system.



6. Contacts

If you have any questions or need further assistance, please reach out to:

Support Coordinator: Jelena Martinov, jmartinov@meritsolutions.com

PMO & Support Manager: Nina Jovanovic, njovanovic@meritsolutions.com

Support team email: support@meritsolutions.com