



Management Controls, Inc.

Customer Support System (CSS)



End User Guide

October 2020

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Overview

The Customer Support System (CSS) is designed to be an interactive support tool (Zendesk) for the customers of Management Control Inc's varied array of products such as Track, Forecaster, Insights, Trackanywhere and Promptt.

There are four main functions:

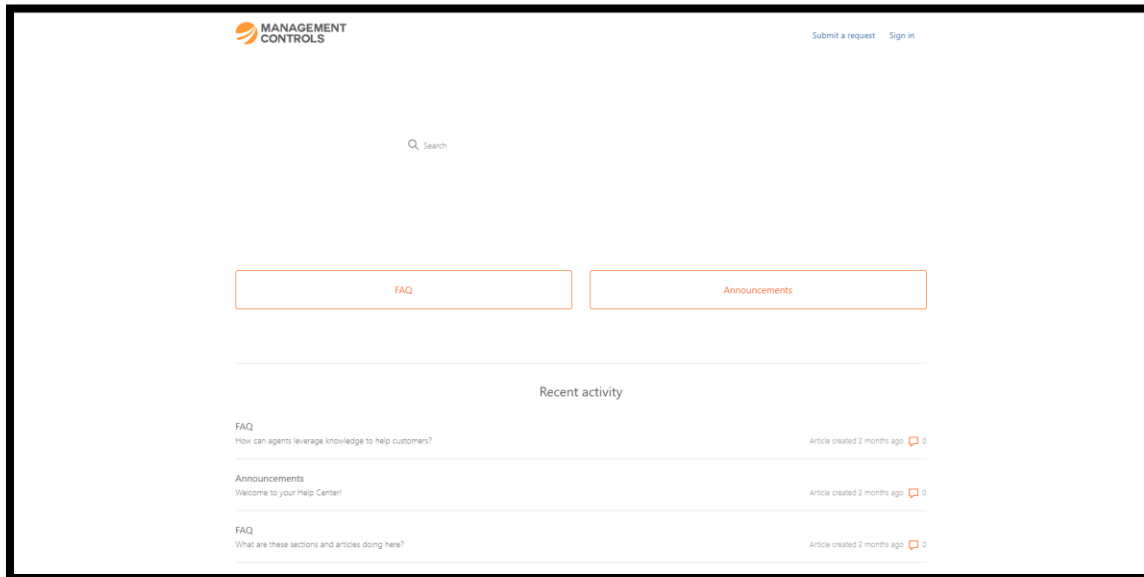
- Submit support tickets
- View and manage support tickets
- View and research common issues published in FAQ (Knowledgebase)
- User administration

How to Login

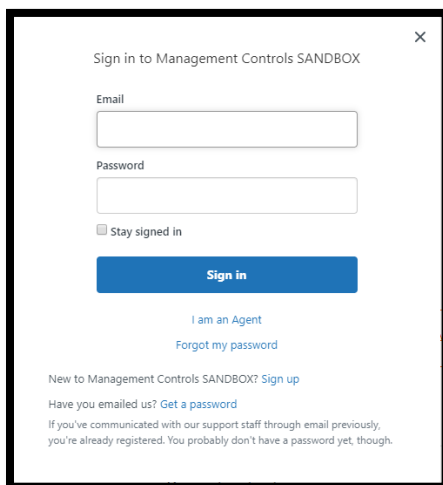
Creating an account

Users are setup individually by MCI in the Customer Support System. Request for access should be emailed to helpdesk@tracksoftware.com. Upon receipt and setup, the user will be emailed a user name and password. The site is hosted at <https://mcisupport.managementcontrols.com>

The link will go to the Home page:



Click on **Sign in** on the upper right-hand corner.
Enter in the assigned Email and Password and click **Sign in**.

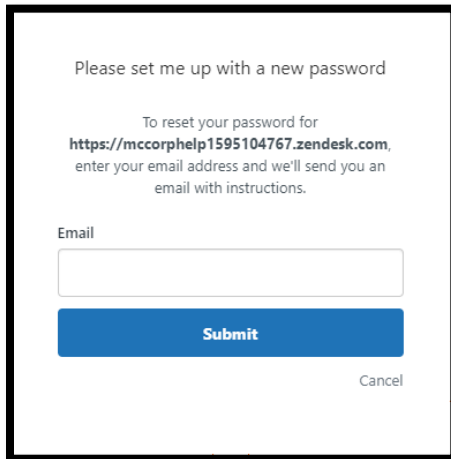


Select the checkbox **Stay signed in** to have the site save your login credentials.

Forgot Password

If the password is lost, click the link **Forgot my password**

Result: The lost password prompt opens:



Please set me up with a new password

To reset your password for
<https://mccorhelp1595104767.zendesk.com>,
enter your email address and we'll send you an
email with instructions.

Email

Submit

Cancel

Enter the email address associated with the account. **Click Submit** button.

Result: A link will be emailed to the email address already setup to submit a new password.

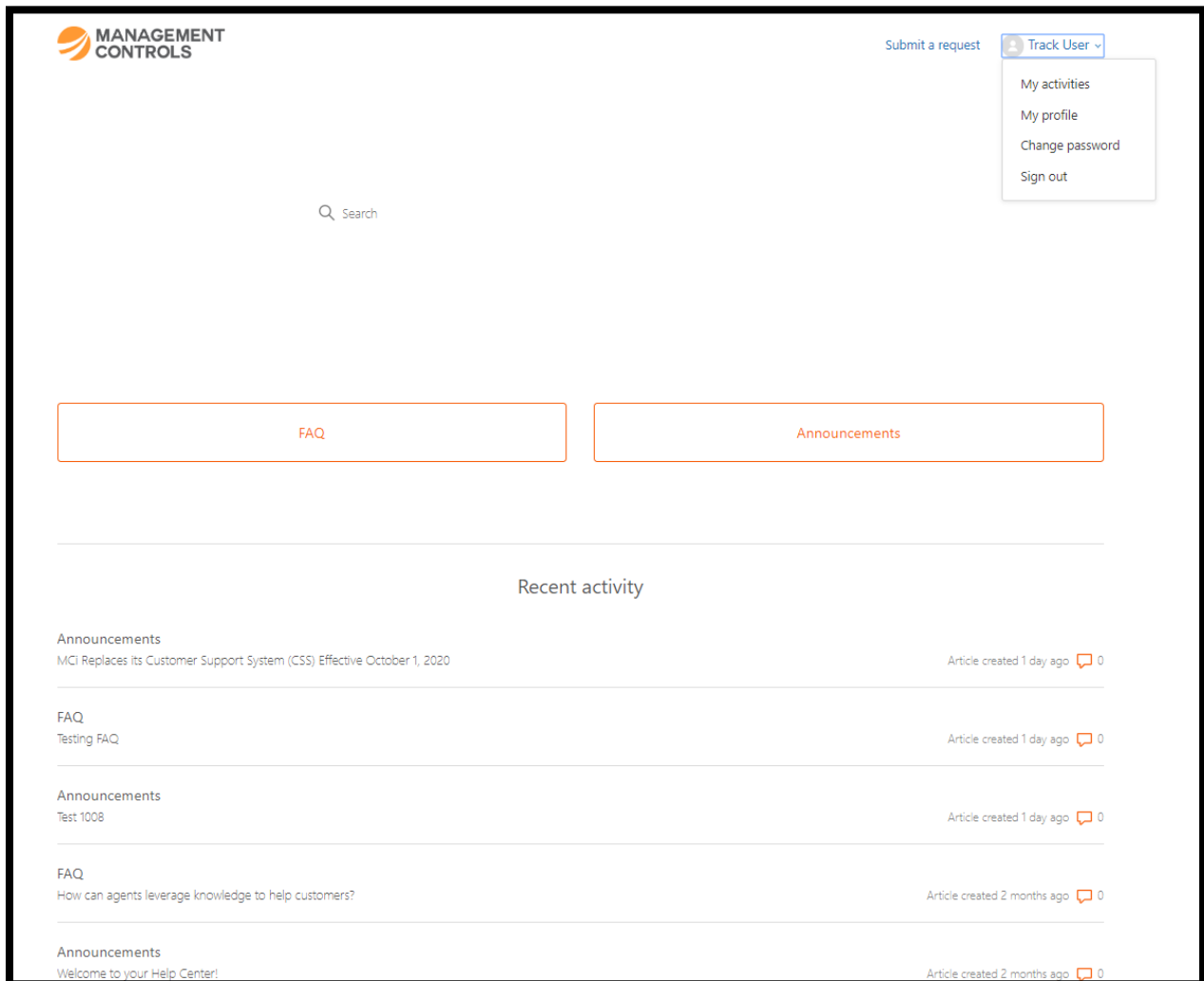
Click on the link, submit a new password, and click the **Change password** button.

Home Page Overview

The navigation link to your tickets are available upon clicking on your **name** under **My activities**.

Other available options are on this page:

- Submit a request
- Search
- FAQ
- Announcements
- Recent activity



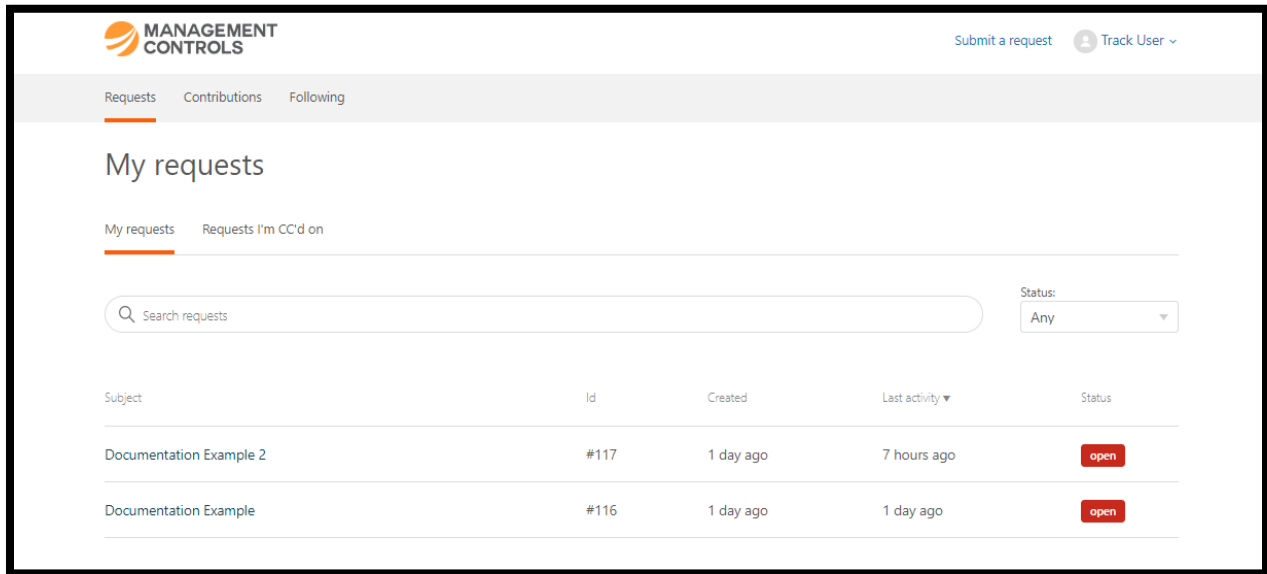
The screenshot displays the Management Controls home page interface. At the top left is the Management Controls logo. On the top right, there is a "Submit a request" link and a "Track User" dropdown menu with options: "My activities", "My profile", "Change password", and "Sign out". Below the logo is a search bar with a magnifying glass icon and the text "Search". In the center, there are two orange-bordered buttons labeled "FAQ" and "Announcements". Below these buttons is a section titled "Recent activity" which lists five items:

Category	Title	Created	Count
Announcements	MCI Replaces its Customer Support System (CSS) Effective October 1, 2020	Article created 1 day ago	0
FAQ	Testing FAQ	Article created 1 day ago	0
Announcements	Test 1008	Article created 1 day ago	0
FAQ	How can agents leverage knowledge to help customers?	Article created 2 months ago	0
Announcements	Welcome to your Help Center!	Article created 2 months ago	0

User Account options are also available when you click on your **name** on the top right:

- My activities
- My profile
- Change password
- Sign out

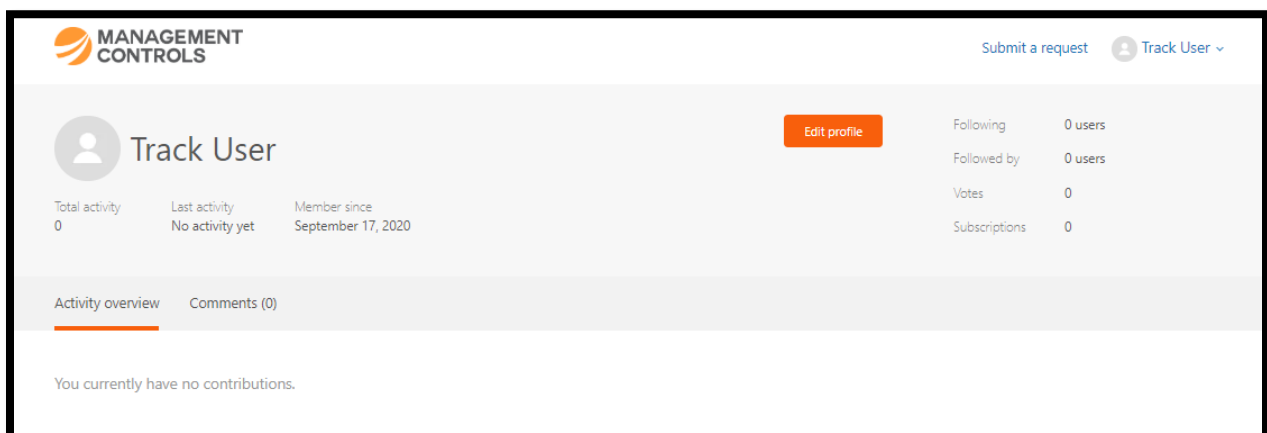
Select **My activities** to view your tickets.



The screenshot shows the 'My requests' page. At the top, there is a navigation bar with 'Requests', 'Contributions', and 'Following'. Below this, the page title is 'My requests'. There are two tabs: 'My requests' (selected) and 'Requests I'm CC'd on'. A search bar labeled 'Search requests' and a status dropdown menu set to 'Any' are visible. Below these is a table with the following data:

Subject	Id	Created	Last activity	Status
Documentation Example 2	#117	1 day ago	7 hours ago	open
Documentation Example	#116	1 day ago	1 day ago	open

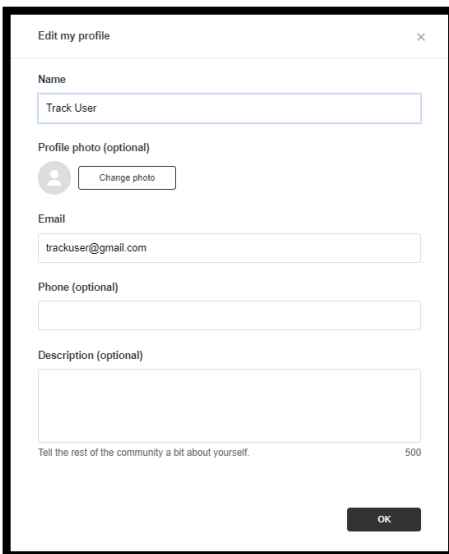
Select **My profile** to view various details of your account.



The screenshot shows the 'Track User' profile page. At the top, there is a navigation bar with 'Submit a request' and 'Track User'. Below this, the user's name 'Track User' is displayed with an 'Edit profile' button. To the right, there are statistics: 'Following: 0 users', 'Followed by: 0 users', 'Votes: 0', and 'Subscriptions: 0'. Below these are tabs for 'Activity overview' (selected) and 'Comments (0)'. At the bottom, it says 'You currently have no contributions.'

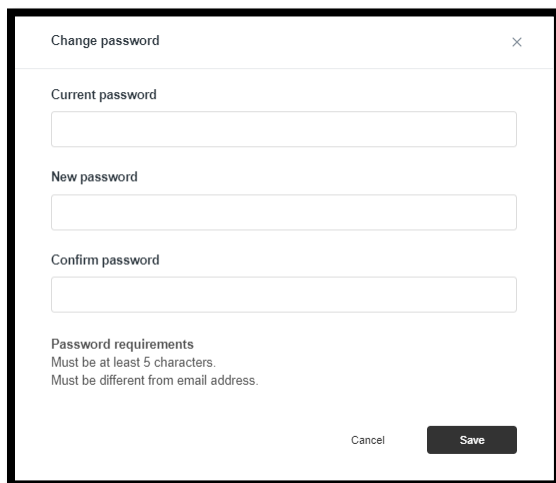
Click **Edit profile** button to change the following items:

- Name
- Profile photo
- Email
- Phone
- Description



Click **OK** save your changes.

Select **Change Password** to change the existing password. Click **Save** button to save changes.



Select **Logout** to log out of the Customer Support Application.

Submitting a Support Ticket

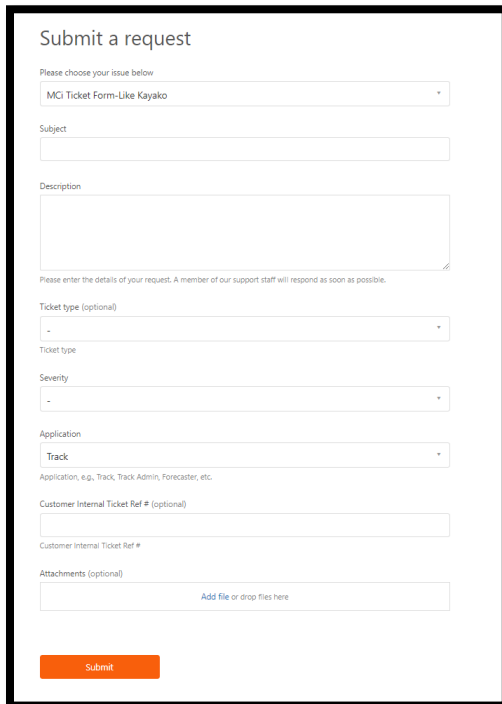
Click the link, **Submit a Request**.

(Alternatively send an email along with attachments to helpdesk@tracksoftware.com to create a ticket)



The screenshot shows the top navigation bar with the Management Controls logo, a 'Submit a request' link, and a 'Track User' dropdown. Below the navigation is a breadcrumb trail: 'Management Controls SANDBOX > Submit a request'. A search bar is located on the right. The main heading is 'Submit a request'. Below it, a prompt says 'Please choose your issue below' followed by a dropdown menu currently showing a hyphen.

Select MCI Support Ticket Form from the drop down and fill in the details of the issue
Add attachments and click submit



The screenshot shows the 'Submit a request' form with the following fields filled out: 'Please choose your issue below' dropdown is set to 'MCI Ticket Form-Like Kayako'; 'Subject' is empty; 'Description' is empty; 'Ticket type (optional)' dropdown is set to '-'; 'Severity' dropdown is set to '-'; 'Application' dropdown is set to 'Track'; 'Customer Internal Ticket Ref # (optional)' is empty; 'Attachments (optional)' is empty with a link 'Add file or drop files here'. An orange 'Submit' button is at the bottom.

General Ticket Information

Subject

- Enter the subject of the ticket.

Description

- **Enter the details** of the ticket issue.

Ticket Type

- Choose Type – Question, Incident, Problem, Task, Change.
- Select a category option from the dropdown.

Severity

- Choose Priority – SEV 1, SEV 2, SEV 3, SEV 4

Application

- Track, Track Admin, PCF, ACS Interfaces, ERP Interfaces, Other.
- Enter appropriate version of the selected application.

Customer Internal Ticket Ref#

- This field is the customer's internal ticket number

Attachments

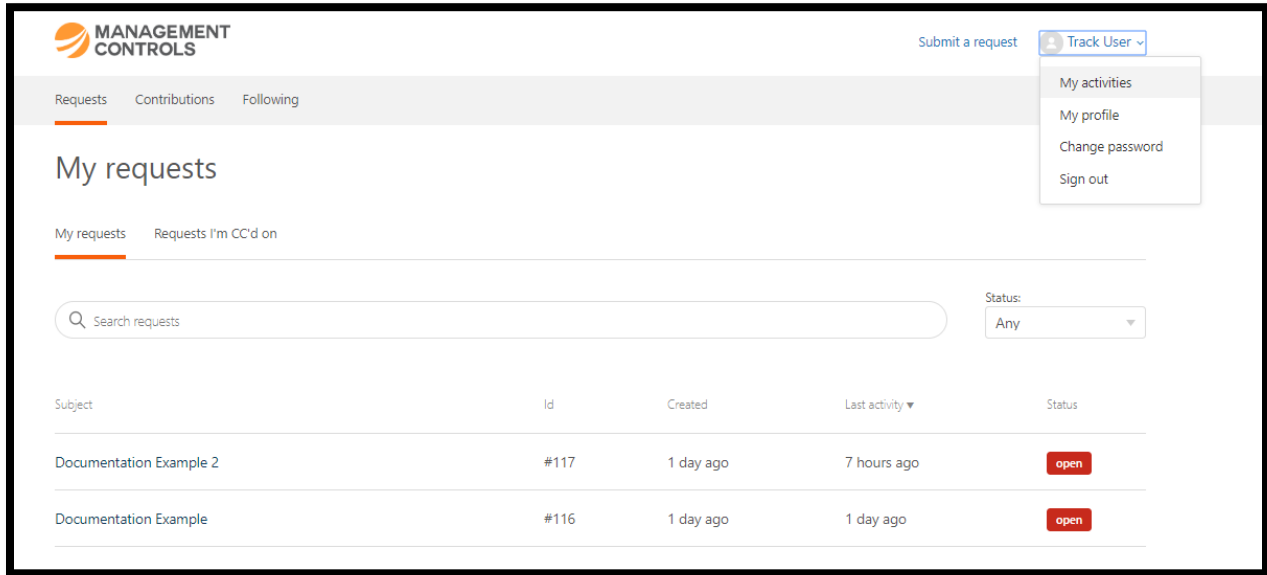
- To add a file to the ticket, select **Add file** or drag the file into the area.

Click the **Submit** button to save the details.

Result: Ticket is saved and a confirmation email is sent to user.

Viewing Tickets

Click on your name on the top right and select **My activities**. All support tickets that have been created will be listed on this page.



MANAGEMENT CONTROLS

Submit a request Track User

My activities
My profile
Change password
Sign out

Requests Contributions Following

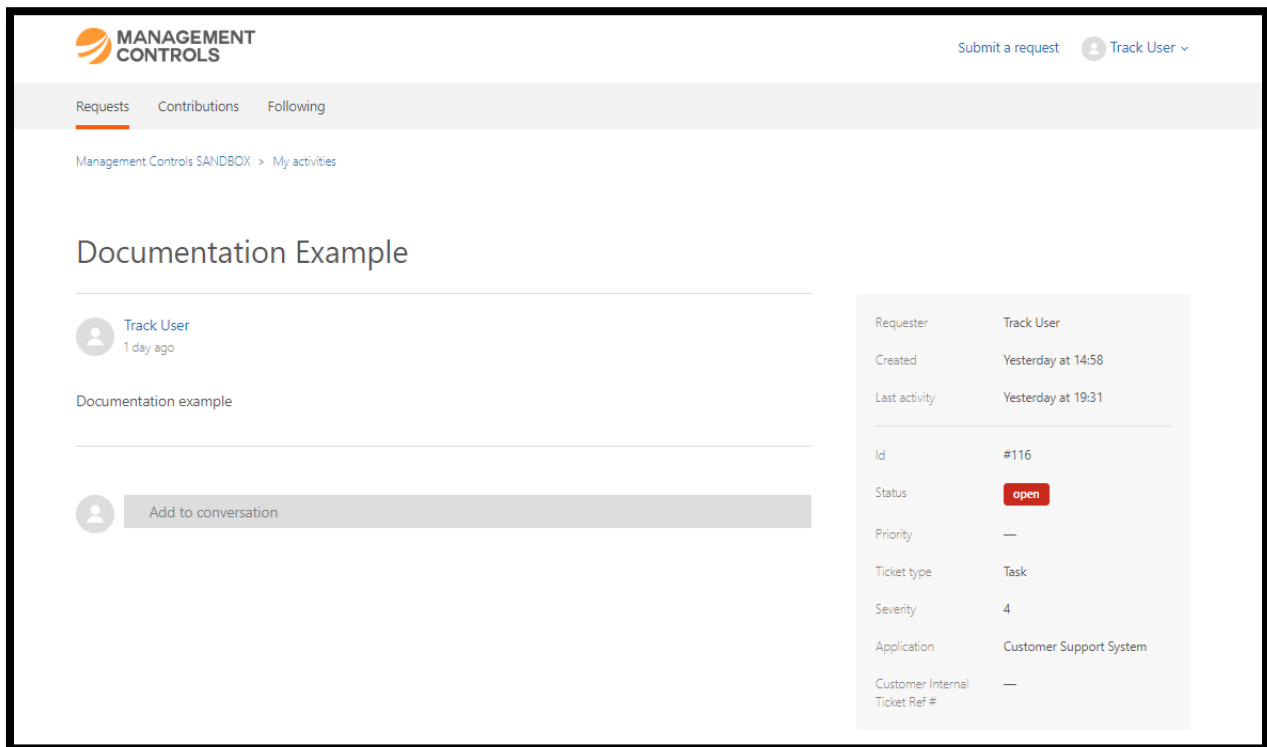
My requests

My requests Requests I'm CC'd on

Search requests Status: Any

Subject	Id	Created	Last activity	Status
Documentation Example 2	#117	1 day ago	7 hours ago	open
Documentation Example	#116	1 day ago	1 day ago	open

Click on **Add to conversation** to add a message to the ticket details:



MANAGEMENT CONTROLS

Submit a request Track User

Requests Contributions Following

Management Controls SANDBOX > My activities

Documentation Example

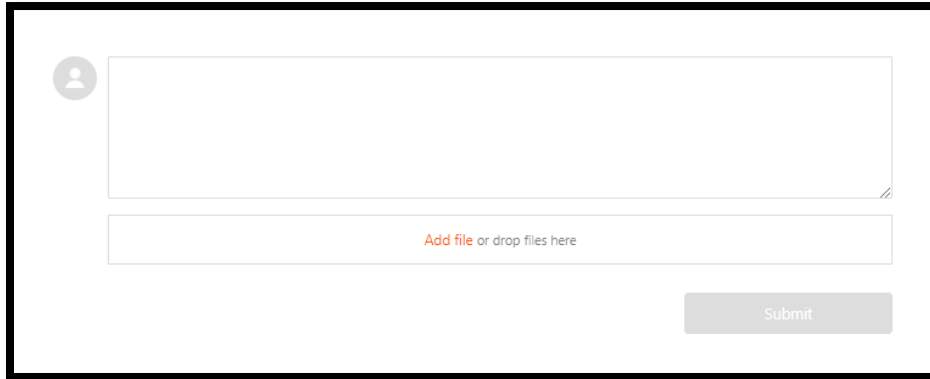
Track User
1 day ago

Documentation example

Add to conversation

Requester	Track User
Created	Yesterday at 14:58
Last activity	Yesterday at 19:31
Id	#116
Status	open
Priority	—
Ticket type	Task
Severity	4
Application	Customer Support System
Customer Internal Ticket Ref #	—

After clicking **Add to conversation** you will see the text box below:



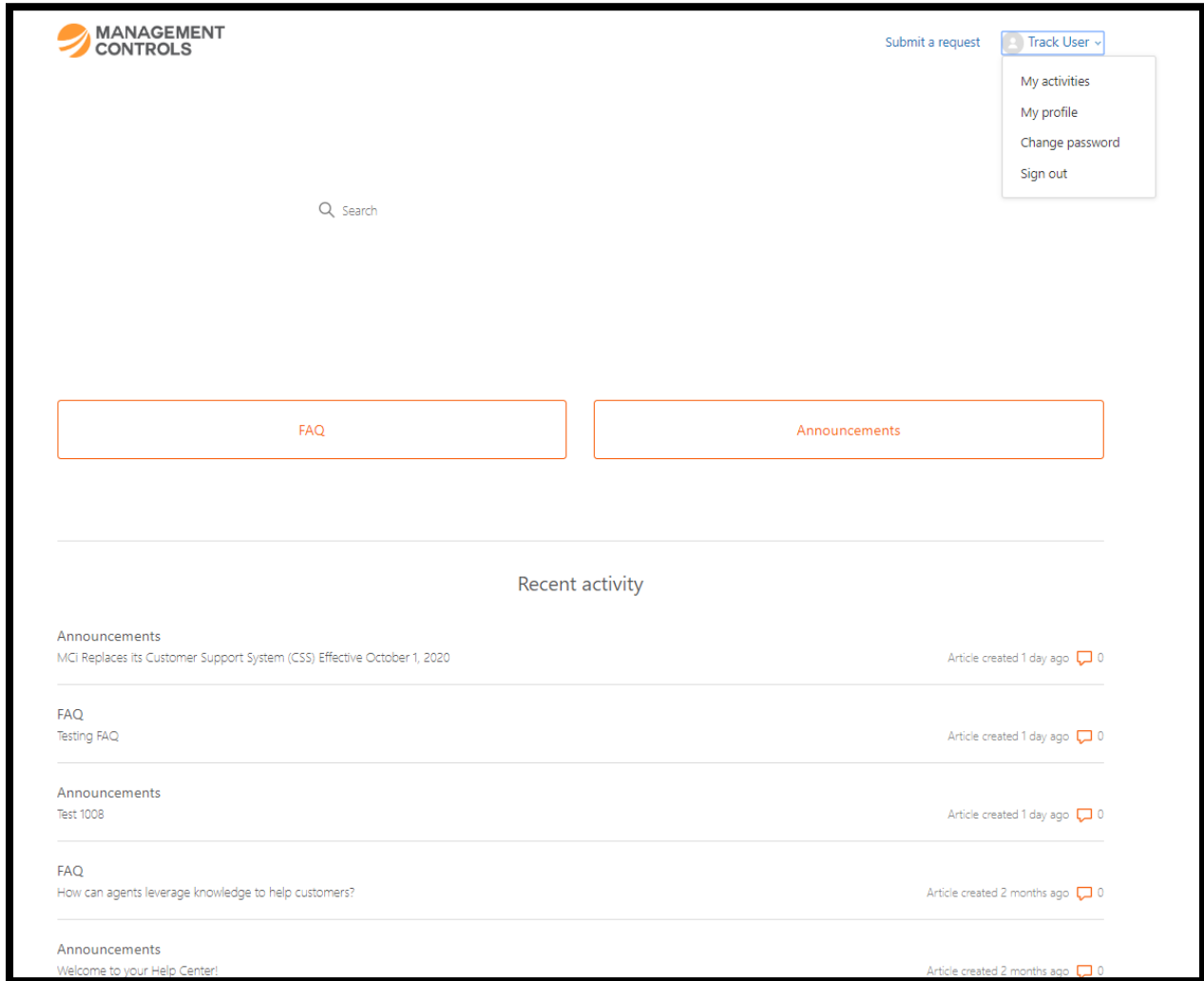
The screenshot shows a user interface for adding a message to a conversation. On the left, there is a circular icon containing a person silhouette. To its right is a large, empty rectangular text input field. Below this field is a smaller rectangular area with the text "Add file or drop files here" in red. At the bottom right of the form is a grey button labeled "Submit".

Click **Add file** or drag files onto the text add files to the ticket details.

Click the **Submit** to add the message to the ticket details.

FAQ (Knowledgebase)

The knowledgebase can be accessed by clicking on the **FAQ** button from the Home page.



This list is created by MCI Customer Support based on common issues and resolutions. It will describe the Problem and the corresponding Solution.

Enter a key word or portion of a word into the search box and **click Search**.

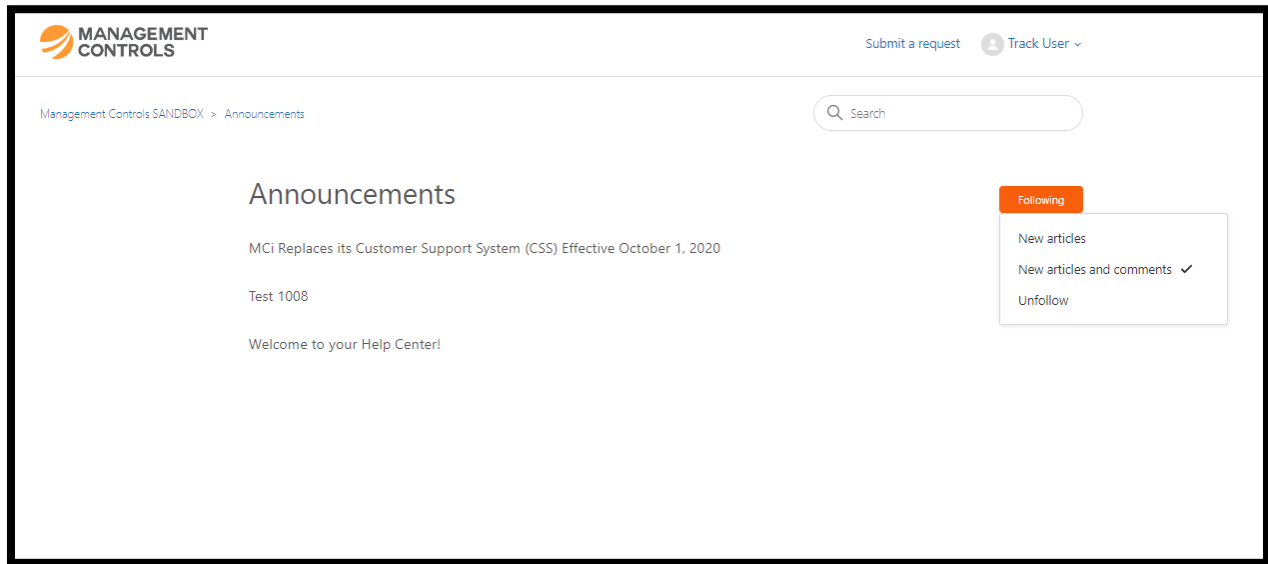
Result: All knowledgebase items that match the keyword will be listed.

Announcements

Click the **Announcements** button.

Result: News articles are displayed.

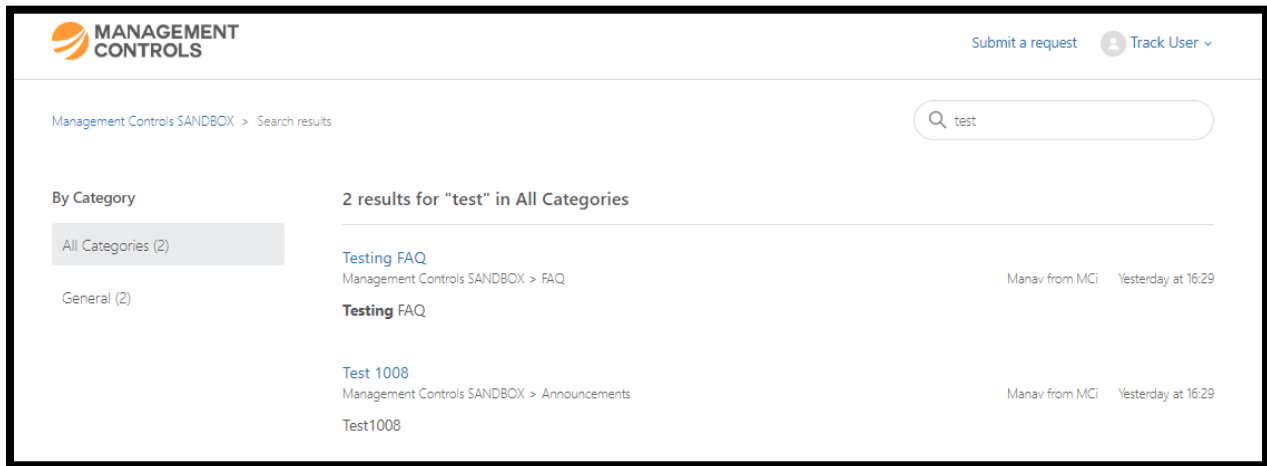
MCi Marketing team selects the news articles that get displayed.



If you click Follow, you will have an option to choose between seeing **New articles** or **New articles and comments** for that announcement.

Search

In the middle of the Home page is a search box. **Enter search words** in to the entry box and **press Enter**.



This will show you all the results from your **tickets, announcements, and FAQs**.

Need further help?

Email us: helpdesk@tracksoftware.com

Call us: 281-590-5881

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