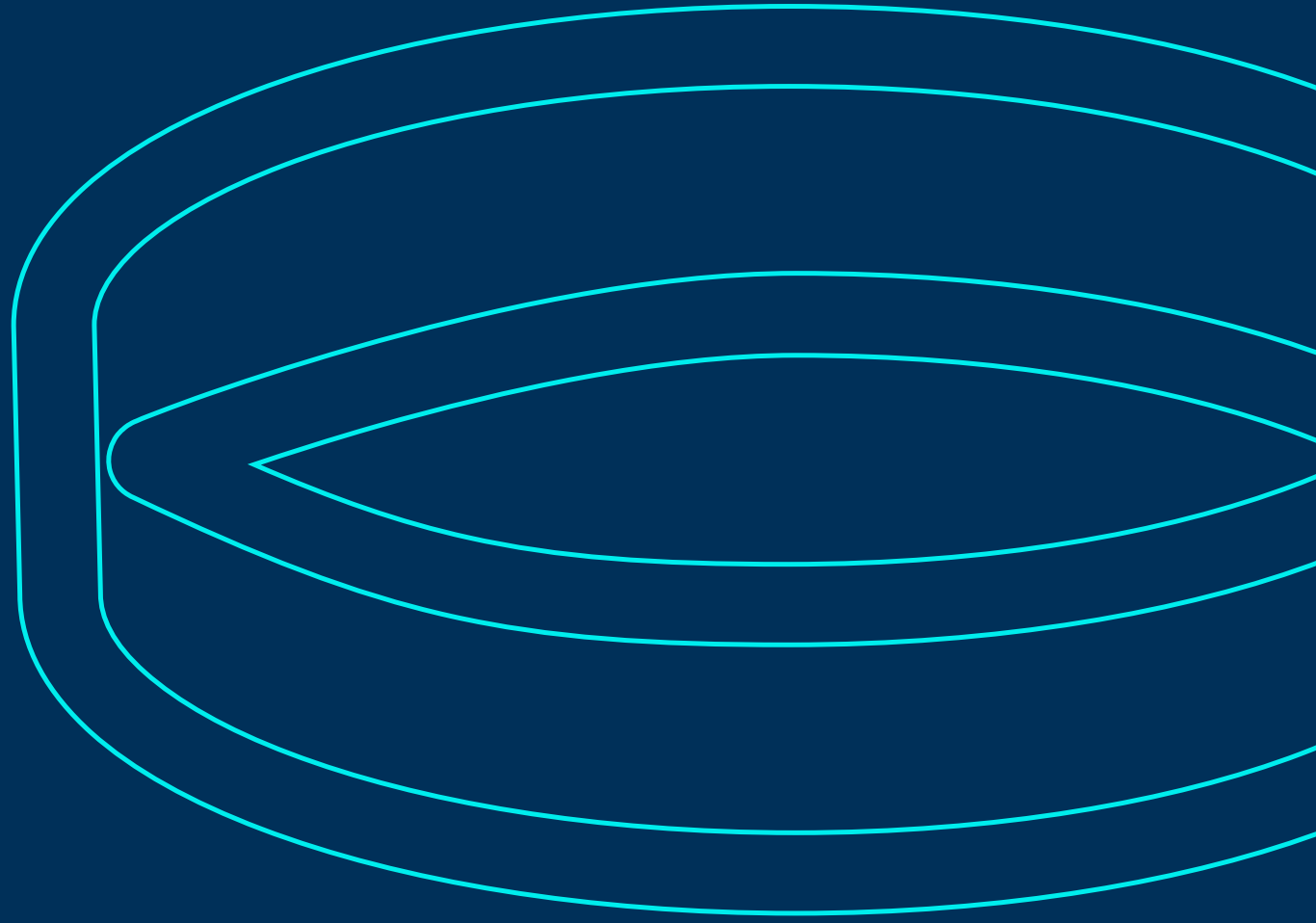


Ticketing System User Training

January 2024





Agenda

Signing up in the Customer Portal 1

Logging in in the Customer Portal &
Resetting your Password 2

Filing a new ticket 3

Managing tickets 4

Logging out of the system 5



Goal

This document serves as a **User Training Guideline**, provided by Engagement Factory, to help you get started with **Ticket Service Hub**. It includes a full step-by-step guideline on how to use the ticket service system (support.engagementfactory.com).

Before you get started

Contact admin (emea_support@blend360.com) if you have any trouble.

Also have a look at our instruction video:
(www.support.engagementfactory.com/knowledge/onboarding-ticketing-system).



Sign up

Go to www.support.engagementfactory.com and click
Register here.



Sign in

The page you are trying to view is only available to registered users.

Email*

Password*

[Show](#)

☒ Remember me

[Forgot password?](#)

Sign in

Don't have an account? [Register here.](#)

Having trouble? [Contact the site's administrator](#)





Welcome!

Set up your password to sign in and see the content you now have access to.

Email*

Password*

[Show password](#)

Password must be at least 8 characters long and include lower and uppercase letters, a number, and a symbol

Confirm Password*

[Show password](#)

In order to provide you the content requested, we need to store and process your personal data. If you consent to us storing your personal data for this purpose, please tick the checkbox below.

☐ I agree to allow Engagement Factory to store and process my personal data.

Save password

Having trouble? [Contact the admin](#)

Fill in your business email address (use a team email address, so all of your team members can access the ticketing portal via the same account)

Save your password that includes:

- At least 8 characters long
- Lower & Upper letters
- Number
- Symbol

Save your password that includes:

The confirmation message will be shown if the submission is complete.



If you submit your, you will receive email address verification email. Click [Confirm](#) to verify your email.





Log-in

Go to support.engagementfactory.com and log-in with your email and password.



Sign in

The page you are trying to view is only available to registered users.

Email*

Email

Password*

Password

Show

☒ Remember me

Forgot password?

Sign in

Don't have an account? [Register here.](#)

Having trouble? [Contact the site's administrator](#)



If you forgot your password, type your email to reset your password.



Sign in

The page you are trying to view is only available to registered users.

Email*

Password*

 [Show](#)

☒ Remember me [Forgot password?](#)

[Sign in](#)

Don't have an account? [Register here.](#)

Having trouble? [Contact the site's administrator](#)

Reset your password

Enter the email address you used to register and we'll send you an email with a link to reset your password.

Email*


[Send reset email](#)

Did it just come back to you? [Sign in](#)

Having trouble? [Contact the site's administrator](#)



If you submit your email to reset the password, you will receive password reset email. Click [Reset Password](#) and save your new password.




Reset your password

Set a new password and sign in to your account.

Reset password

If you did not make this request, you can safely ignore this email.
If you have questions, please [contact the site's administrator](#)



Create new password

Your new password must be different from your previously-used password.

New password*

New password

Show

Password must be at least 8 characters long and include lower and uppercase letters, a number, and a symbol

Confirm new password*

Confirm new password

Show

Save password

Having trouble? [Contact the site's administrator](#)

If you experience any troubles, click [Contact the admin](#).



Sign in

The page you are trying to view is only available to registered users.

Email*

Email

Password*

Password

Show

☒ Remember me

Forgot password?

Sign in

Don't have an account? [Register here](#).

Having trouble? [Contact the site's administrator](#)

If you have trouble, Click *Contact the admin*.


It redirects you to send the email to emea_support@blend360.com.





File a New Ticket

Click *New Tickets* to file a new ticket.



New Tickets Tickets Log out

Tickets

View

My tickets

Status

All

ID	SUBJECT	CREATED	LAST ACTIVITY	STATUS
No results found				

[New Tickets](#)

Copyright 2023 All rights reserved.

File a support ticket

First name

Last name

Email

Category

Please Select ▼

Request *

Priority

Please Select ▼

Technology

Please Select ▼

Request description *

File upload

We kindly request that you refrain from uploading or sharing any Personal Information (PI) through this form. PI includes, but is not limited to, names, addresses, phone numbers, email addresses, social security numbers, or any other information that can be used to identify an individual.

No file chosen

Blend is committed to protecting and respecting your privacy, and we'll only use your personal information to administer your account and to provide the products and services you requested from us. From time to time, we would like to contact you about our products and services, as well as other content that may be of interest to you. If you consent to us contacting you for this purpose, please tick below to say how you would like us to contact you:

☐ I agree to receive other communications from Blend.

You may unsubscribe from these communications at any time. For more information on how to unsubscribe, our privacy practices, and how we are committed to protecting and respecting your privacy, please review our [Privacy Policy](#).

By clicking submit below, you consent to allow Blend to store and process the personal information submitted above to provide you the content requested.

Submit

Fill in your name.

Email address will be automatically filled-in

Check the right category relevant to your ticket.

Provide the ticket name (a short summary of the request or issue).

Specify the level of urgency needed on the ticket.
Specify the technology you are using (the technology the ticket applies to).

Provide a detailed description of the issue or request.

Upload a file/image to support your issue or request. (Please do **NOT** share any sensitive data).

The confirmation message will be shown if the submission is complete.



Fill in the fields to file a ticket.

First name

Last name

Email

Category

Please Select

Request *

Priority

Please Select

Technology

Please Select

Request description *

File upload

We kindly request that you refrain from uploading or sharing any Personal Information (PI) through this form. PI includes, but is not limited to, names, addresses, phone numbers, email addresses, social security numbers, or any other information that can be used to identify an individual.

Choose File No file chosen

Blend is committed to protecting and respecting your privacy, and we'll only use your personal information to administer your account and to provide the products and services you requested from us. From time to time, we would like to contact you about our products and services, as well as other content that may be of interest to you. If you consent to us contacting you for this purpose, please tick below to say how you would like us to contact you:

Category

Product issue	Billing issue
Feature request	General inquiry

Priority

High	Medium
Low	

Technology

HubSpot	Salesforce
Oracle	Others

Fill in the fields to file a ticket.

First name

Last name

Email

Category

Please Select

Request *

Priority

Please Select

Technology

Please Select

Request description *

File upload

We kindly request that you refrain from uploading or sharing any Personal Information (PI) through this form. PI includes, but is not limited to, names, addresses, phone numbers, email addresses, social security numbers, or any other information that can be used to identify an individual.

No file chosen

Blend is committed to protecting and respecting your privacy, and we'll only use your personal information to administer your account and to provide the products and services you requested from us. From time to time, we would like to contact you about our products and services, as well as other content that may be of interest to you. If you consent to us contacting you for this purpose, please tick below to say how you would like us to contact you:

Category

Product issue

Problems with your product. Issues with functionality, bugs, errors, or any other issues that prevent from using the product

Billing issue

Issues with payment, invoices, subscription plans, or any other billing-related matter

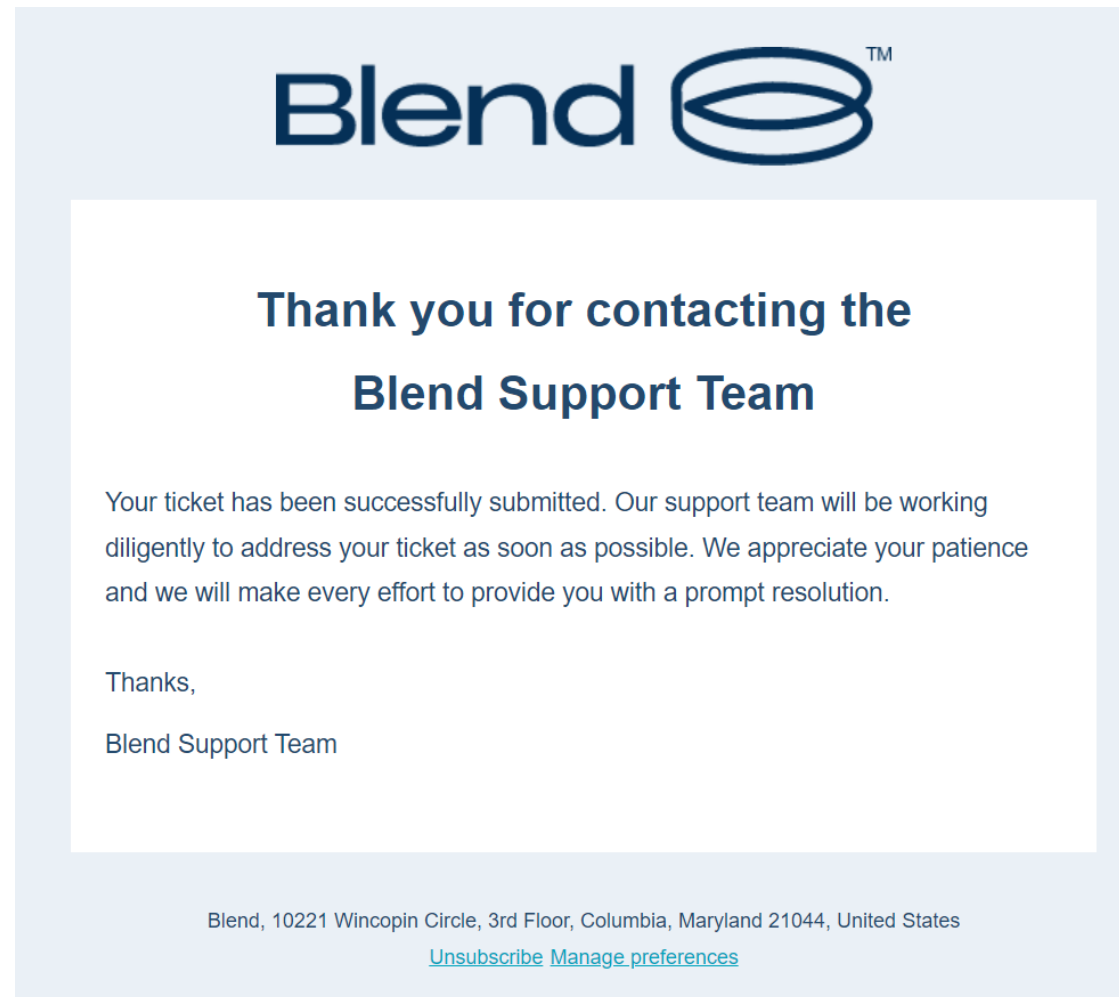
Feature Request

New features or improvements to the product. Enhancements to existing features or new feature proposal

General Inquiry

Questions or concerns that do not fall into other categories. Questions about company, procedures, or any other inquiries

After submitting a new ticket, you will receive a confirmation email in your inbox.





Manage Tickets

Select **Tickets** to see the list of the tickets you have raised.



New Tickets

Tickets

Log out

Tickets

Q Search

View

My tickets

Status

All

ID	SUBJECT	CREATED	LAST ACTIVITY	STATUS
#1564948618	test ticket	April 17, 2023	57 minutes ago	OPEN



Click on the ticket to check its details.




Tickets

<div><div>Q</div><div>Search</div></div>		<div>View</div> <div>My tickets</div>		<div>Status</div> <div>All</div>
ID	SUBJECT	CREATED	LAST ACTIVITY	STATUS
#1564948618	test ticket	April 17, 2023	57 minutes ago	<div>OPEN</div>



The conversation of the open ticket is shown in the ticket.
You could **write a response** to keep the conversation moving.

The screenshot displays the Blend CRM interface for viewing a ticket. At the top, the Blend logo is on the left, and navigation links for 'New Tickets', 'Tickets', and 'Log out' are on the right. Below the header, a link 'View all Tickets' is visible. The main content area shows a ticket titled 'Example Subject' with a status of 'OPEN' and a reference number '#123'. The conversation history includes a message from 'HubSpot User' and a reply from 'Customer'. At the bottom, a response form is highlighted with a blue border, featuring a text input field, an 'Attach a file' button, a file preview area, and a 'Send' button.


Blend 


New Tickets Tickets Log out

< View all Tickets


Example Subject Status: **OPEN**



#123

 **HubSpot User** in 1 second
Here is an example reply from the Conversations Inbox

 **Customer** in 1 second
Here is an example reply from Customer Portal

Write a response...

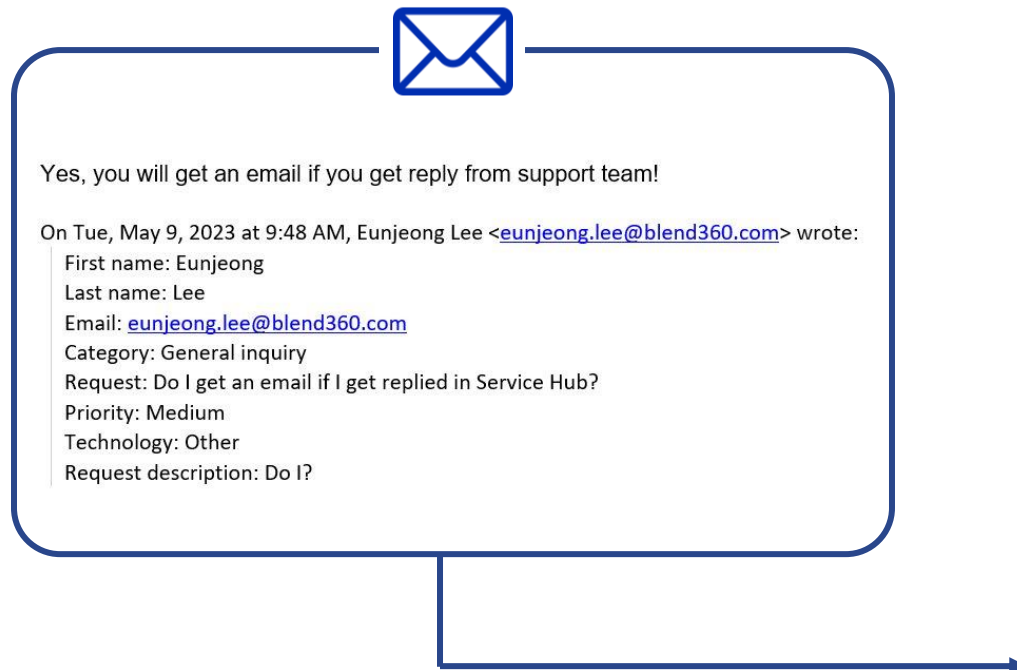
 **Attach a file** (Max file upload size 50MB)

 **Preview File Name** 9.8 KB 

Send

You will receive the email once you get a reply from support team emea_support@blend360.com.

The conversation is updated in the ticketing system as well.



Do I get an email if I get replied in Service Hub? Status: **OPEN**

#1607292970

Miss 3 days ago

First name: Eunjeong
Last name: Lee
Email: eunjeong.lee@blend360.com
Category: General inquiry
Request: Do I get an email if I get replied in Service Hub?
Priority: Medium
Technology: Other
Request description: Do I?

Eunjeong 3 days ago

Yes, you will get an email if you get reply from support team!

You could reply to the email to keep the conversation going.
It will be updated in the Service Hub accordingly.



RE: Do I get an email if I get replied in Service Hub?



Stephanie Hagen
To



Wed 10/05/2023 14:24

This is a reply from email, not via customer portal



Eunjeong

2 days ago

Reply to this ticket by email, not via Customer Portal.
It aims to test whether the conversation is lost in case the user doesn't use Service Portal to reply.



Miss

2 days ago

This is a reply from email, not via customer portal.



Stephanie Hagen
Marketing Technology Consultant
+31623465726
stephanie.hagen@blend360.com



This electronic mail transmission may contain confidential or privileged information. This message is intended for use by the intended recipient(s) only. If you believe you have received this message in error, please notify the sender by reply transmission and delete the message without copying or disclosing it.



Ticket Update Reminder

If there has been no update or response for 3 days from last activity date, you will receive the email from: *Blend <ticket owner email address>*.

[View in browser](#)

Hi Mister,

It's been three days since I last heard from you regarding the ticket

1668987279

"What is the from-address of the ticket?"

This is your Ticket ID

This is your Ticket Name

I just wanted to check in. Do you need any further information or help? If not, I'll close this out, but if you'd like further help on what we talked about, please reopen this ticket.

Best regards,

Woil Tahboun

You will receive the reminder from your ticket owner



Blend, 10221 Wincopin Circle, 3rd Floor,
Columbia, Maryland 21044, United States
[Unsubscribe](#) [Manage preferences](#)



Log-out

Click *Log out* to log out.



[New Tickets](#) [Tickets](#) [Log out](#)

Tickets

 Search

View My tickets ▼

Status All ▼

ID	SUBJECT	CREATED	LAST ACTIVITY	STATUS
#1564948618	test ticket	April 17, 2023	57 minutes ago	OPEN



Click *Sign in* to log in again. Click *return to the home page* to go to knowledge base article page.



Sign in

The page you are trying to view is only available to registered users.

Email*

Email

Password*

Password

Show

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Forgot password?

Sign in

Don't have an account? [Register here.](#)

Having trouble? [Contact the site's administrator](#)

You are signed out

Sign back in

Or return to the [home page](#)



Help Center

[Go to blend360.com](#)

[Go to Customer Portal](#)

How can we help you?

Search for answers



Account & Setup



Thank  you