

**FRM Solutions, LLC**

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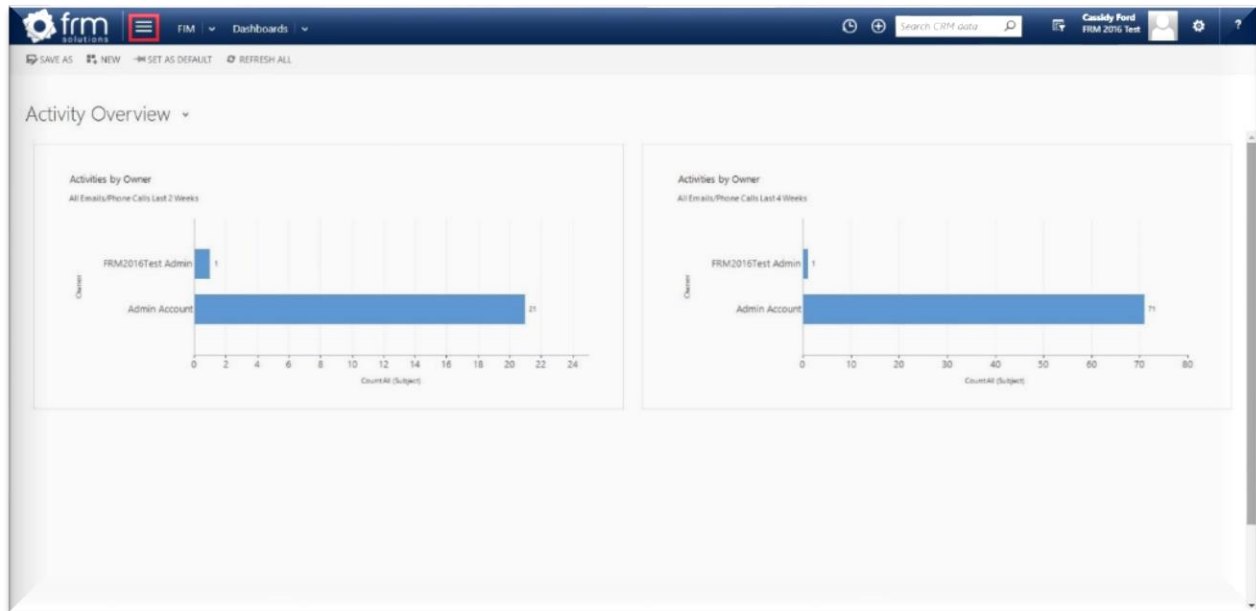
## **FRM Client Support User Guide**

*Updated 11/01/19*



FRM Client Support is based within FRM and allows you to easily report a technical problem, ask a question, or request assistance and additional resources from the FRM team. You can easily access FRM Client Support regardless of which module or screen you happen to be in.

To get started, click the three lines on the left-hand side of the ribbon at the top of your screen.



Navigate to the “Help Center” tile, then click on “FRM Client Support” in the drop-down menu. It is important to remember to navigate through FRM Client Support using the dedicated navigation buttons, rather than hitting the “back” arrow on your internet browser.





To view all cases, whether created by you or anyone in your company, use the drop-down bars to navigate to other views. To begin the process of creating a new support case, click “Create New Case.”

Case Number	Status Reason	Priority	Created On	Customer	Support Type
CAS-06808-G9S0	In Progress	Normal	11-07-2018	Cassidy Ford	
CAS-06809-M0X5	In Progress	Normal	11-07-2018	Cassidy Ford	
CAS-06810-V7K4	In Progress	Normal	11-07-2018	Cassidy Ford	
CAS-06811-F9L7	Waiting for Details	Normal	11-07-2018	Cassidy Ford	
CAS-06812-J5H2	In Progress	Normal	11-07-2018	Cassidy Ford	
CAS-06813-W2J9	In Progress	Normal	11-07-2018	Cassidy Ford	

Complete the fields regarding your case. Please provide as much detail about your issue or request as possible, including: detailed description, first occurrence, user(s) affected, specific examples, screenshots, etc.

Select the “Case Type,” which will be either *Request*, *Problem*, or *Question*. Then, select a “Priority” level, either *Normal*, *High*, or *Critical*.

**Create New Case**

Title\*: Understanding new support system

Description\*: I am looking for a guide to the new support system.

Case Type: Request ▼ Priority: Normal ▼

Attachment: Choose File | No file chosen

Create Case



Be aware the “Critical” priority level indicates a serious malfunction, and it should only be selected in cases involving system-downtime. You will receive two notifications of this as a reminder before you submit your case.

**Create New Case**

Title\*:

Description\*:

Case Type:  Priority:

By choosing “CRITICAL”, you agree that the issue is a production down or major malfunction resulting in users being unable to perform their normal functions

Attachment:  No file chosen

Once you hit “Create Case,” a confirmation message will appear and you will be directed back to the default view.

**Welcome to Client Support Cassidy Ford**

**FRM Support Cases**

Status:  Created By:

Count: 2

Title	Case Number	Status Reason	Priority
How do I fix the WiFi?	CAS-06811-F9L7	Waiting for Details	Normal
Just like the first one	CAS-06814-M5B4	Waiting for Confirmation	Normal



To edit a case that has already been submitted, select the desired case and click “Edit Case.”

FRM Solutions Help Center FRM Client Support

NEW ACTIVITY + NEW RECORD IMPORT DATA

Cases Profile

Welcome to Client Support **Cassidy Ford**

FRM Support Cases

Status: All Open Cases Created By: Me

Refresh

Count: 9

Title	Case Number	Status Reason	Priority	Created On	Customer	Support Type	
Wifi Lag Time	CAS-06808-G950	In Progress	Normal	11/07/2018	Cassidy Ford		<b>Edit Case</b>
Wifi Still Sucks	CAS-06809-M0X5	In Progress	Normal	11/07/2018	Cassidy Ford		Edit Case
Wifi Sucks Again	CAS-06810-V7K4	In Progress	Normal	11/07/2018	Cassidy Ford		Edit Case
How do I fix the Wifi?	CAS-06811-F9L7	Waiting for Details	Normal	11/07/2018	Cassidy Ford		Edit Case
How Do I fix the Wifi again?	CAS-06812-J5H2	In Progress	Normal	11/07/2018	Cassidy Ford		Edit Case
I'm out of titles	CAS-06813-W2J9	In Progress	Normal	11/07/2018	Cassidy Ford		Edit Case

Here you can provide the support team with an update or close the case as resolved. A message will appear confirming the case has been successfully updated or closed. If you resolved the case, it will now show under the “Closed Cases” view on your starting screen. Note, once a case is closed, it will become ‘view only.’

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NEW ACTIVITY + NEW RECORD IMPORT DATA

Cases Profile

**Edit Case**

CAS-06808-G950

Status: In Progress

Add a new note:

I have a new router and the wifi is no longer lagging.

Add a New Attachment:

Choose File No file chosen

Update and Assign to Support Close Case

Created on 11/07/2018 14:27:23 GMT-0500 (Eastern Standard Time)

CUSTOMER>

For more information or to access other support guides and training materials, visit the FRM Support Page online.