

Aurea Hub: Getting started with Aurea Support

Posted by [Viorel Curic](#) Mar 31, 2021

One unified portal, one set of credentials, all your Aurea products!


Welcome to your new destination for Aurea Customer Support. Our mission is to provide a scalable, knowledgeable and customer-centric experience, based on timely issue resolution and transparent communication that enables you to successfully adopt Aurea products and solutions.

- [Logging in for the first time](#) on page 1
- [Using the Aurea Support dashboard](#) on page 2
- [Creating a new support ticket](#) on page 5
- [Requesting new logins for other users on your team](#) on page 5
- [Viewing support cases](#) on page 6
- [Updating tickets](#) on page 7
- [Other resources](#) on page 7

Logging in for the first time

For most of you, your existing login credentials will work for the new Aurea Support portal. However, if you currently access Aurea Support via <https://support.aurea.com>, you will receive an email on April 4th, 2021, from support@aurea.com with a link to set your password. With that information, provide a secure password and take the following steps to login for the first time.

1. Access your email and locate the email with subject line *Aurea Support password reset* which will contain the link to set up your password.

Aurea Support password reset  Inbox x

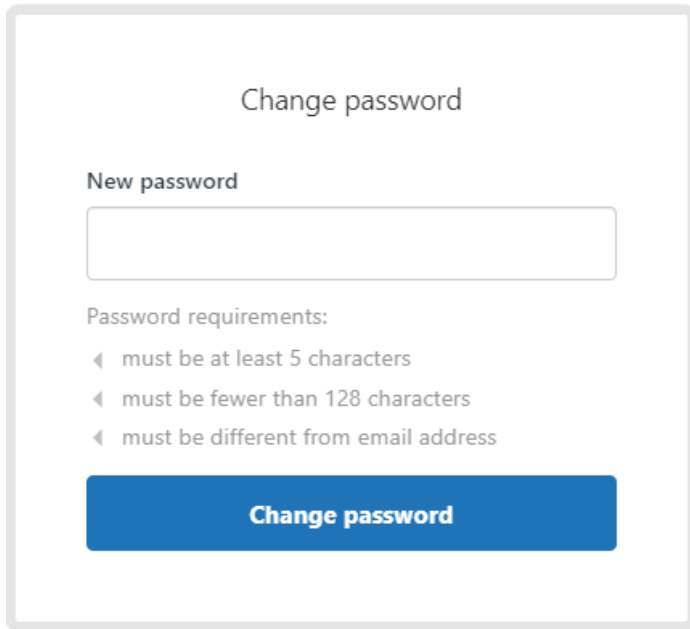
Aurea Support

to me ▾

This email was sent to you because someone requested a password reset on your account.

Visit the following URL to set a new password:

2. Access the link provided and set up your new password



The screenshot shows a 'Change password' form. At the top, it says 'Change password'. Below that is a label 'New password' followed by a text input field. Underneath the input field, it says 'Password requirements:' followed by three bullet points: 'must be at least 5 characters', 'must be fewer than 128 characters', and 'must be different from email address'. At the bottom of the form is a blue button labeled 'Change password'.

If you have any difficulty logging in, please call the dedicated Aurea Rescue Line at **+1 833-379-2578** for details on how to activate your account and assistance with accessing the new Aurea Support Portal. Note that this line is NOT intended to be used to create or follow-up on tickets, it is only to be used for problems with accessing the Support Portal.

Please note that if your organization has a firewall, you may need to Whitelist some IP addresses to use Zendesk. For information on how to handle the configuration, please [click here](#).

Using the Aurea Support dashboard

As you login into the Aurea Support Portal (<https://support.aurea.com>), you will be presented with a dashboard containing all Aurea products:


Customer Support



Products


[ALL PRODUCTS](#) / [SALES & MARKETING](#) / [COLLABORATION](#) / [INTEGRATION](#) / [IT & COMPLIANCE](#) / [COMMERCE](#) /

SALES & MARKETING




Crm Customer Relationship Management

SALES & MARKETING




Fr FirstRain

SALES & MARKETING




Lm List Manager

SALES & MARKETING




Cam Campaign Manager

SALES & MARKETING




Dcm Distribution Channel Management

SALES & MARKETING




Sb SalesBUILDER

SALES & MARKETING




Sy Synoptos

COLLABORATION



Bz Bonzai

COLLABORATION



Pm Portal Management
Formerly Broadvision

COLLABORATION

INTEGRATION

INTEGRATION

To access any of the product-specific portals, simply click on the tile containing the product name.

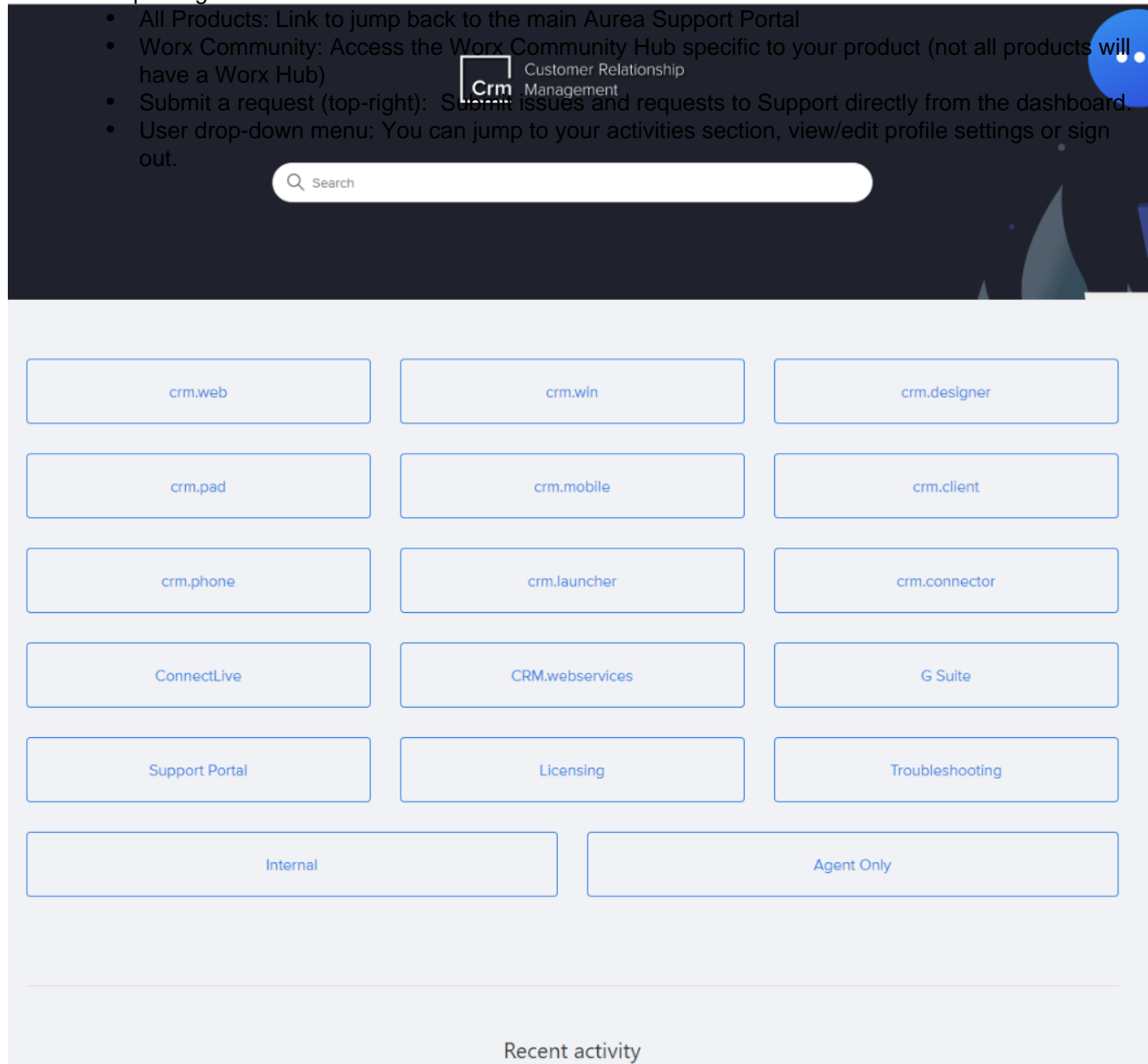
Aurea Hub: Getting started with Aurea Support



The product-specific portal dashboard includes:

Top navigation:

- All Products: Link to jump back to the main Aurea Support Portal
- Worx Community: Access the Worx Community Hub specific to your product (not all products will have a Worx Hub)
- Submit a request (top-right): Submit issues and requests to Support directly from the dashboard.
- User drop-down menu: You can jump to your activities section, view/edit profile settings or sign out.



- Search Knowledge Base: The search bar allows you to quickly find any relevant content, including articles, documentation, posts, and more.
- Knowledge Base sections: List of categories of articles grouped by product, component, functionality, and purpose.
- Recent activity: List of the latest Knowledge Base articles added to the portal.

Creating a new support ticket

You can create a new case using the "Submit Request" link which takes you to a form. The form includes several required fields that help us understand your issue quickly and thoroughly, such as:

- *CC (optional)*: useful if you want to provide visibility for all ticket updates for other individuals
- *Organization*: used to differentiate between multiple accounts
- *Subject*: a quick overview of your issue
Note: As you're filling in the ticket subject, our Support Portal automatically suggests related resources from our Knowledge Base and FAQs that may be helpful. With more articles created every day by our team, you might quickly find the solution for your request and gain valuable time.
- *Description*: a detailed description of your issue
Priority: the impact this issue has on your business. Priority levels include:
 - *Urgent*: Complete loss of a core organizational or business process where work cannot reasonably continue
 - *High*: High impact on organizational or business processes. An effective and imminent workaround or resolution appears to be within standard support service level agreements.
 - *Normal*: Minimal organizational or business impact (e.g., single-user issues)
 - *Low*: Routine Q&A and support consulting (e.g., how-to questions)
- *I prefer to be contacted by phone (optional)*: used to highlight your preferred contact method
- *This data is originating from the European Economic Area or Switzerland (optional)*: flags the ticket as potentially containing sensitive data.
- *This ticket may contain highly sensitive data such as personal data, personally identifiable information, financial information (optional)*: used to route your ticket to our ITAR or GDPR teams to review it for sensitive data, prior to the ticket being assigned to a Support Engineer.
- *Attachments (optional)*: allows the uploading of any relevant attachments for the problem you are reporting (logs, screenshots, videos etc.)

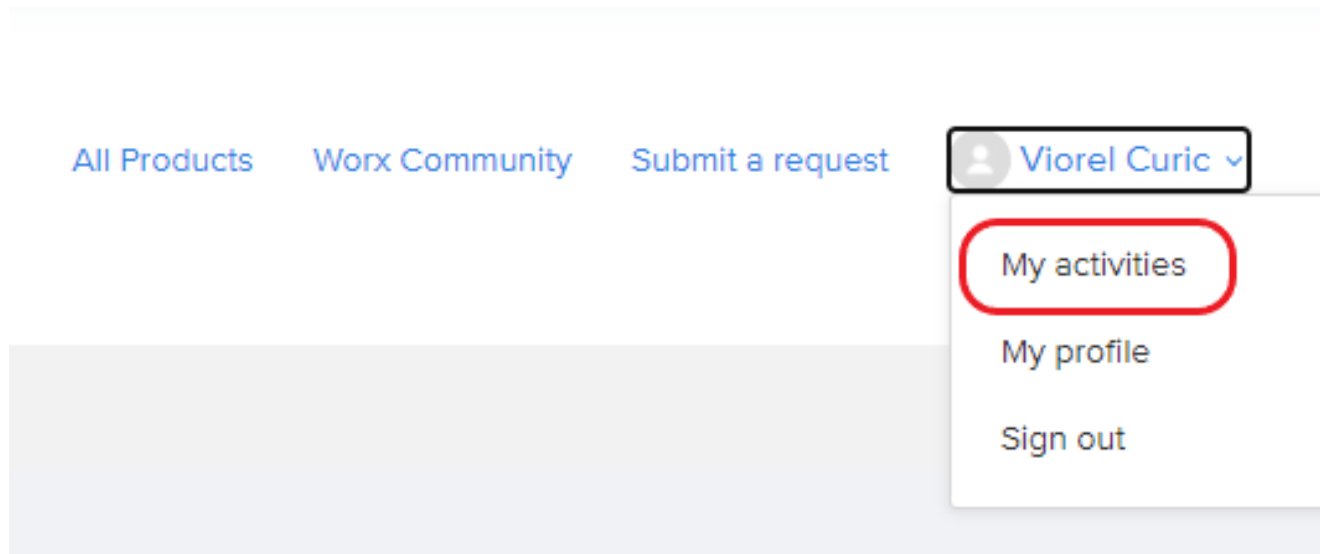
Requesting new logins for other users on your team

You can add new contacts to your organization to allow them to view and participate in all the cases on your account. For security reasons, new users must be requested by an existing organization member via a new support case.

Create a case in the support portal that includes the new contact's name, title, email and telephone number. The new contact will receive an email asking them to set their own credentials.

Viewing support cases

To view your support cases, use the drop-down menu under your name and select *My activities*



Within the *My requests* menu is the *My Requests* dashboard. This allows you to:

Select which requests you would like to review:

- My requests: support tickets created by you
 - Requests I'm CC'd on: support tickets created by someone else and for which you are added as a CC, allowing you to view and participate in the activity for that particular ticket
 - Organization requests: full list of all the tickets created by members of the organization you are part of
 - Search for a particular request by typing in keywords (useful when looking for historical information)
- Status: allows filtering by ticket status:
- *Any*: shows all tickets
 - *Open*: only the tickets in Open status, actively being worked by our Support Engineers, will be listed
 - *Awaiting your reply*: list of tickets which are pending information or confirmation from your side, as per the last comment added by our Support Engineers
 - *Solved*: view the list of Support tickets that have already been marked as Solved

| Subject | Id | Created | Last activity | Status |
|---------------|----------|----------------|-------------------|---------------------|
| Demo ticket 4 | #2682640 | 2 minutes ago | a few seconds ago | Solved |
| Demo ticket 3 | #2682633 | 19 minutes ago | 3 minutes ago | Awaiting your reply |
| Demo ticket 2 | #2682631 | 19 minutes ago | 18 minutes ago | Open |
| Demo ticket 1 | #2682630 | 20 minutes ago | 18 minutes ago | Open |

To review the full history of comments on any of your tickets simply click on the subject line. The entire ticket communication history will be displayed with the most recent update being at the bottom. In addition, on the right side you can see all the properties of the ticket.

Updating tickets

The new Support Portal offers two options:

1. Update your request via the Support Portal, from the *My requests* section mentioned above. Once you have opened a ticket for review, at the bottom of the comments section you will find the 'Add to conversation' option which allows you to enter any comment, add someone to the CC list and also upload attachments
2. **Update via email!!!** While creating tickets is only available via the Support Portal (to ensure appropriate information is captured upon ticket creation and avoid unnecessary delays), updating existing tickets can be done by simply replying from your mailbox to the thread generated by the ticketing system when a ticket has been created or updated. Please note that each ticket will have its own email thread. Providing updates for multiple tickets in the same email might cause delays in addressing them.

Other resources

Aurea Hub: Getting started with Aurea Support

Visit our [Worx Community](#) for additional resources, peer support and best practices before deciding to open a ticket. By navigating to our [Product Hubs](#) you can pick from our product-specific hubs that are of interest to you.

Rescue line: +1 833-379-2578 - if you encounter problems with logging into our Support Portal, please call this number to receive assistance.

69 Views

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