

Customer Community Quickstart Guide

The Community is PeopleAdmin’s online customer portal which provides multiple features in one easy location for customers:

- “**Cases**” for submitting issues or change requests*
- “**Groups**” for updates and sharing information with peers
- “**Ideas**” for product suggestions
- “**Knowledge**” for a searchable knowledge base of company and product updates and information

This guide provides useful steps and tips to help you maximize your use of the Community. If you have any questions about the Community, please submit a case and we will be happy to assist you.

*Change requests are for select products only. Please see your Account Manager if you have questions.

Getting Started

Click the “Customer Login” link in the top right corner on www.peopleadmin.com or log directly into the Community at <http://community.peopleadmin.com>

Enter your username and pass-word into the login box and click “Sign In”.

PeopleAdmin

If you have forgotten your password, click on “Forgot your password?”. On the next page enter your username and click “Continue”.

The system will then send a password reset email to the email address for that username.

TIP: Your username is your email address (ex: jsmith@org.edu becomes the username jsmith@org.edu).

Home

Once you log into the Community you will see the home page with tabs for each area across the top, a Latest News section, and helpful information across the middle of the page.

Clicking on the shortcut links will take you to that tab (ex: “Knowledge” takes you to the Knowledge articles tab). We also display general contact info, busi-ness hours, and support managers’ information.

TIP: Latest News will often have helpful links to articles, videos, etc.

Opening a New Case

Customers have three** options when submitting cases:

- Submit the case in the Community, or
- Send an email to your product support address or
- Place a call to Customer Success.

In all three instances, once submitted, the case will also be visible in the Community.

To submit a case directly in the Community:

1. Go to the Cases tab and click the “New” button in the middle of the page.
2. Select the Case Record Type as “Customer Support...”. If implementing, select “Professional Services...”
3. Complete the fields marked with a red pipe: Product Name, Case Priority, Subject, and Description.
4. Click Save.

Your contact information will default into the case from your record. A case number will be assigned future reference, and you will receive an email that confirms your case was logged.

**TalentEd customers can also submit tickets via chat.

TIP: When you enter the case subject and tab out of it, the system will populate a list of articles that match keywords in your subject. Clicking on the article name will let you pre-view the article and see if it answers your question. If it doesn’t, you can still return to your case and submit it.

Updating Cases

When you click the **Cases** tab, you will see a page that allows you to view any cases you have submitted. By default, the most re-cently viewed cases are displayed. You can click the View dropdown and choose any of the following: **My Cases** shows all cases you have submitted regardless of status, **My Closed Cases** shows all of your closed cases, and **My Open Cases** shows all of your new, open, and pending cases. Selecting the view name and / or clicking the “Go!” button will open the view.

In the view you can sort by clicking on a column header or view a case’s details by clicking “Edit”, its case number, or its subject.

When viewing a case you can click the **Add Comment** button to update the case. Adding a comment to the case will send the case owner an email alert. You can also add an attachment by clicking **Attach File** below the Comments. It is particularly help-ful to attach screenshots with the URL for Customer Success.

TIP: To update a case by email, you can reply to the confirmation email or any email you receive from Customer Success regarding your case. The email will include your case token, so please do not erase the subject line or body.

Groups

To subscribe to announcements and participate in discussions, click on the **User Group** tab and select “Groups” on the left. **My Groups** are the groups to which you belong and **Active Groups** are all available groups in the Community. From here you can:

- **Search for a group** by entering its name in the search box and hitting enter.
- **Join a group** by clicking either “Join” for public groups or “Ask to Join” for private groups in the Membership column.
- **Enter a group’s page** by clicking on the Group name.
- **Update your email subscription** to the Group below the Group avatar.
- **Post to a group** by entering your message or uploading a file or link in the top box and clicking the Share button.
- **Like a post** by clicking “Like” below the post.
- **Comment on a post** by clicking “Comment” below the post, entering your text, and clicking the Comment button.

TIP: Join the PeopleAdmin group for company updates. Join your product group for product updates.

Knowledge

For all company and product documentation, click on the **Knowledge** tab where you can **search for articles** by either a) navigating to a category by clicking on “Company” or “Product” and selecting the category you want to view OR b) entering a keyword or phrase in the search bar and hitting your enter key.

In your search results, you will see the article title, an optional summary, whether it is a General Article or Product Release, and when it was last published. You can also sort your results in the top right corner by clicking on the option next to **Sort by** and choosing Published Date, Best Rating, Most Viewed, or Title. If you have searched by keyword, you can also sort by Relevancy.

To view an article, **click on the article title**. You will be able to read the article, look at its properties (including publish dates), and rate the article for usefulness. To **rate the article**, select the number of stars in the top left corner of the article.

TIP: Articles rated highly are more likely to be viewed by other customers. Articles rated lowly could be pulled for revising or, if the content is no longer applicable, archiving.

Ideas

In the **Ideas** tab, select your product from the Zone dropdown at the top left. Once you are in your zone, you can:

- **Filter by category or status** in the top right corner.
- **Vote on an Idea** you like by clicking the “promote” button.
- **Comment on an Idea** by clicking on the Idea title, entering your text in the Comment box, and clicking “Post”.
- **Submit your own Idea** by clicking the “Post Idea” button in the middle of the page.

TIP: The more votes, the more likely an Idea will be noticed.

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