

# InvGate Service Management Guide for Customers

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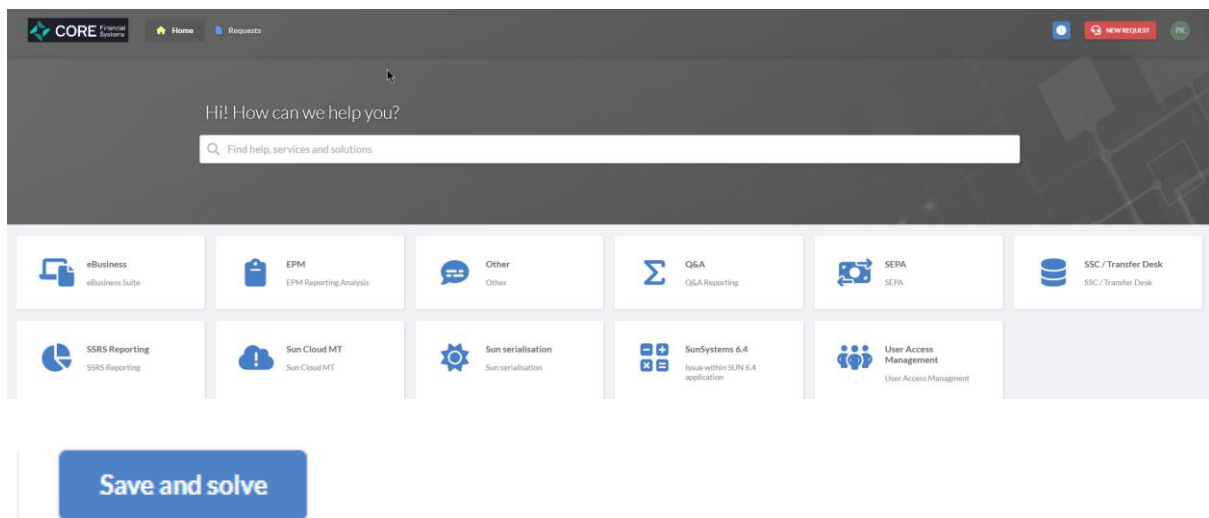
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# Logging into InvGate

Use this link to login to Invgate:-

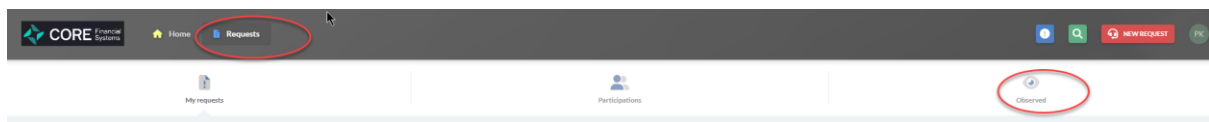
[Core Financial Systems Limited - Service Management](#)

You will be issued login details from Core Financial Support. After logging in you will be brought to the **HOME** section. Click on the **REQUESTS** button to see all calls logged by you.



To see other calls logged by colleagues in your organisation

Click the **Requests** button, and select **Observed**

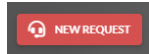


# To Raise a New Ticket

Click on the catalogue item from the Home screen e.g.



Or click the NEW REQUEST button at the top right of the screen



Select a category:

## SunSystems 6.4

Issue within SUN 6.4 application

- ☐ Data Audit Query
- ☐ Error Message / Other
- ☐ Fixed Assets Sun Systems
- ☐ Payment Runs
- ☐ Report Scheduler
- ☐ Reporting
- ☐ Supplier Setup

Fill in the ticket details

A screenshot of the 'New Request' form in the SunSystems 6.4 application. The form is titled 'New Request' and has a breadcrumb trail 'SunSystems 6.4 > Fixed Assets Sun Systems'. It contains several fields: 'Type' (a dropdown menu with 'Question' selected), 'Priority' (a dropdown menu with 'Low' selected), 'Third Party Ticket Number' (a text input field), 'Subject' (a text input field), and 'Description' (a rich text editor with a toolbar). At the bottom of the form, there are two buttons: 'Attach file' and 'Paste Image'. A 'Send' button is located at the bottom right of the form.

- *Priority will default to Low, please change if necessary*
- *Third Party Ticket Number is not a required field but can be used if you have raised this with your own IT resource and want to refer to their ticket number*
- *Subject – brief description of problem*
- *Description – full description of problem*
- *Attach File, or Paste Image to attach screenshots*
- *Click **SEND***

Once the ticket is logged you will receive an email confirmation showing the ticket number

**NOTE** please ask your IT team to whitelist [corefinancialhelpdesk@corefinancial.ie](mailto:corefinancialhelpdesk@corefinancial.ie) as this is where the responses will come from

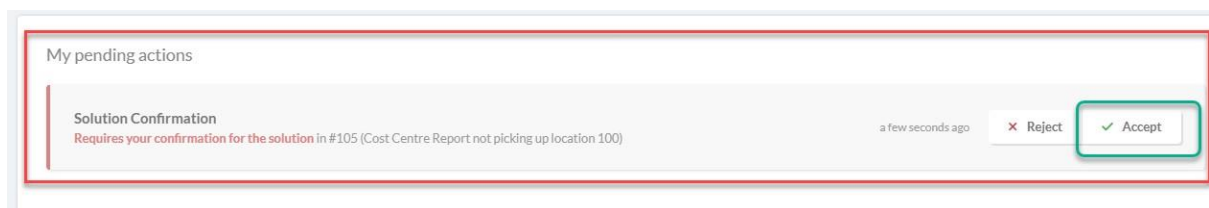
You can check the status of the ticket or send additional information / requests on the ticket

ID	Request	Status	Customer	Assigned agent	Priority	Creation date	Last update
#429		Resolved		A. Pease	Low	3 hours ago	34 minutes ago
#308		Closed		L. O'Connor	Low	12 days ago	38 minutes ago
#345	Q&A Issue Amending Reports <small>Other</small>	Waiting		O. Woods	Low	7 days ago	an hour ago

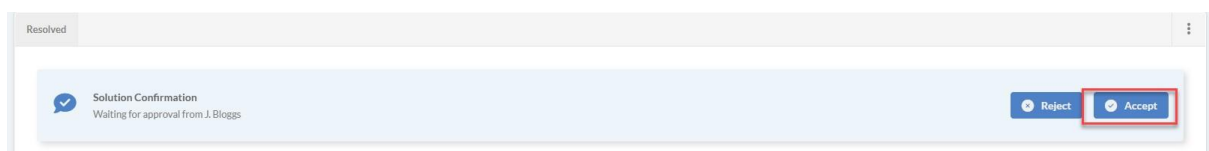
- You can check the status column to see if the ticket is resolved / waiting etc
- Click into the ticket to add a new reply
- You will also get an email notification if a ticket has been updated

## Resolving a ticket – Accepting or Rejecting a Solution

From the portal, the end-user will receive a notification for a solution confirmation:

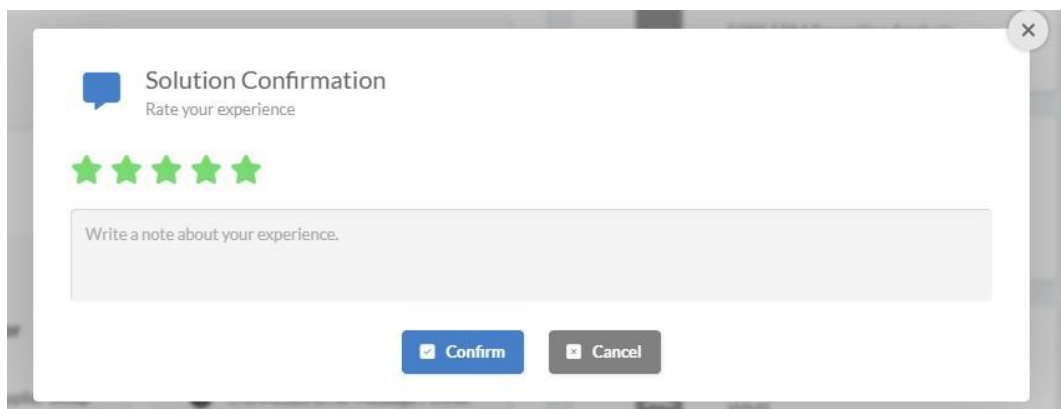


If the solution is accepted by the end-user, click the **Accept** button. If you would like to see more information on the call, click into the call from the list. The solution can be accepted from inside the ticket also:



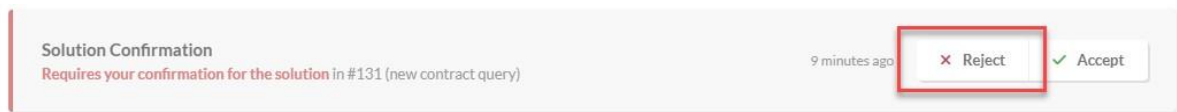
After you have accepted the solution, the ticket will be **closed**.

You will be requested to click on a star rating. Star 4 / 5 will not require a comment.

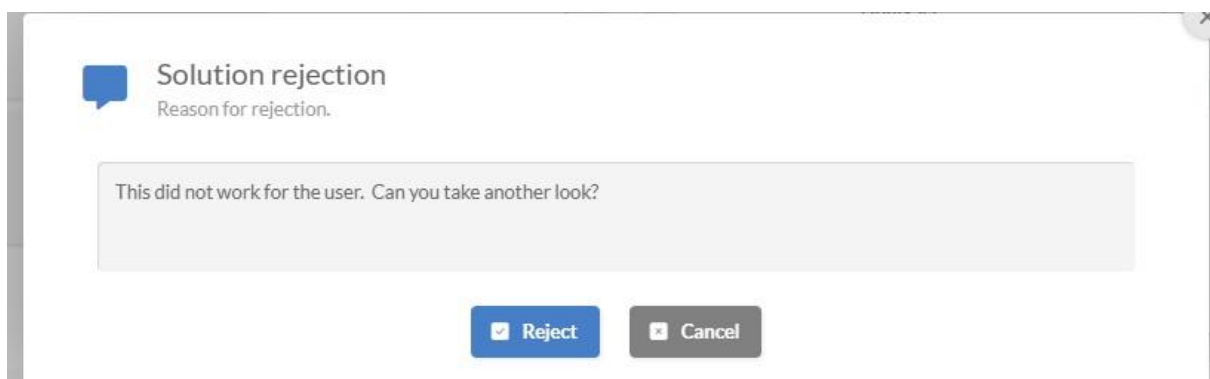


## Rejecting a Solution

If the solution provided does not resolve the issue for the user, the solution can be rejected:



Click the **Reject** button and enter the reason for rejection:



This will change the status of the call back to **Open**