

InvGate Service Management Guide for Customers

Table of Contents

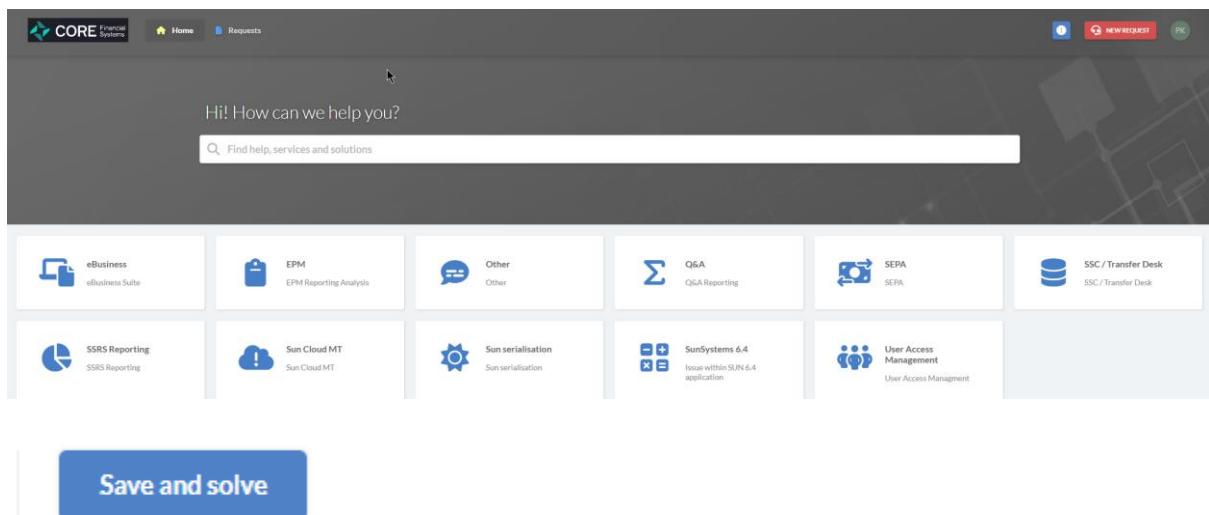
Logging into InvGate	1
To Raise a New Ticket	2
Resolving a ticket – Accepting or Rejecting a Solution	3
Rejecting a Solution	4

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**

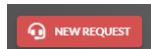


To Raise a New Ticket

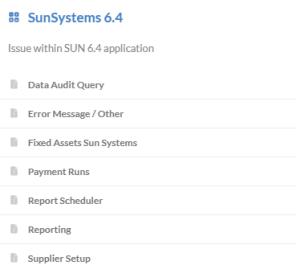
Click on the catalogue item from the Home screen e.g.



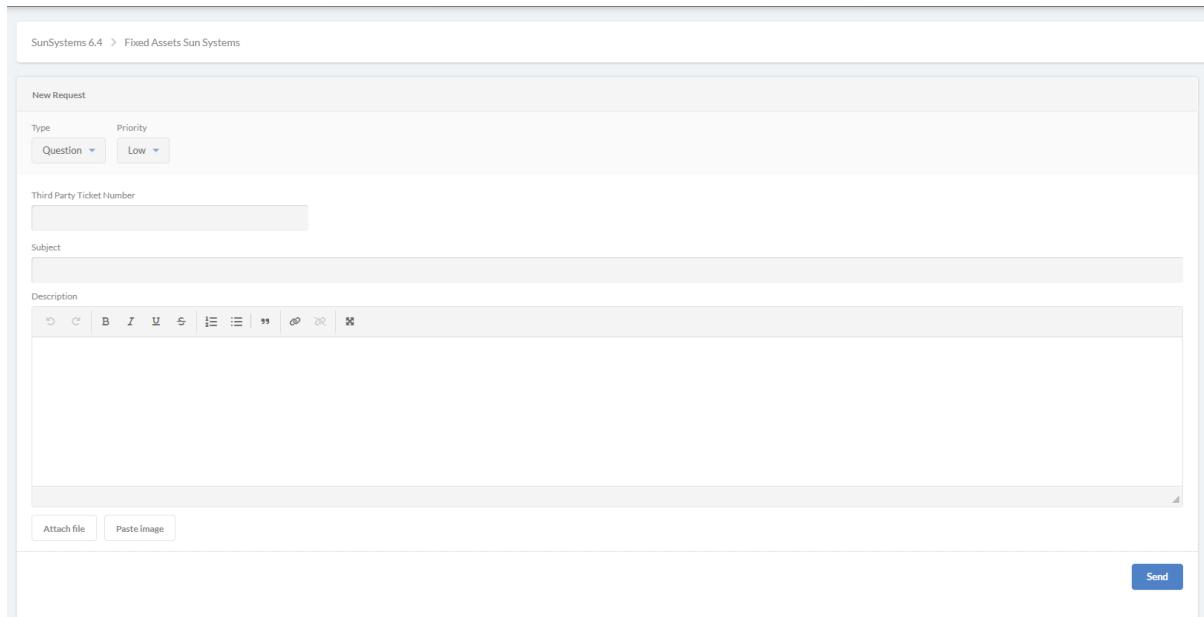
Or click the NEW REQUEST button at the top right of the screen



Select a category:



Fill in the ticket details



The form fields include:

- Type: Question
- Priority: Low
- Third Party Ticket Number: (empty)
- Subject: (empty)
- Description: (rich text editor)
- Buttons: Attach file, Paste image, Send

- 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 as this is where the responses will come from

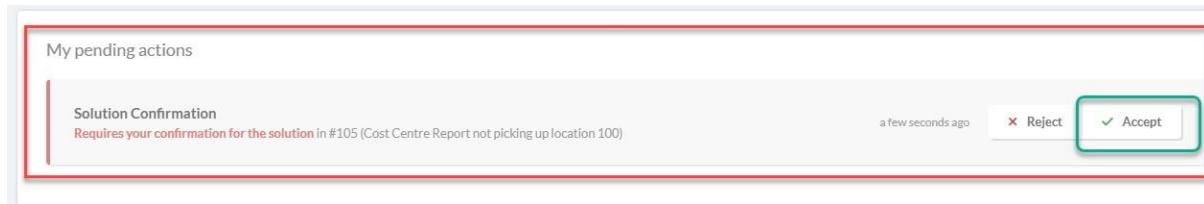
You can check the status of the ticket or send additional information / requests on the ticket

ID	Request	Status	Customer	Assigned agent	Priority	Creation date	Last update
8429		Resolved		A. Pesta	Low	3 hours ago	34 minutes ago
#208		Closed		L.O'Connor	Low	12 days ago	38 minutes ago
8245	QA Issue Amending Reports <small>Open</small>	Waiting		G.Woods	Low	7 days ago	an hour ago

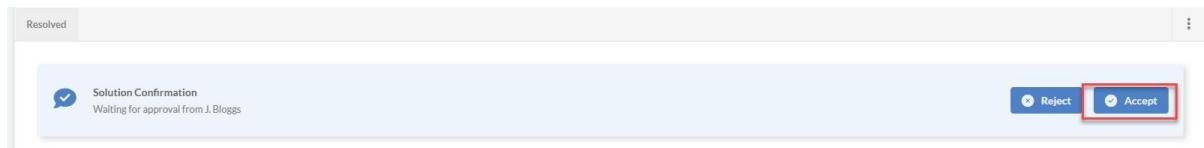
- You can check the status column to see if the ticket is resolved / waiting etc
- Click into the ticket to add a new reply
- You will also get an email notification if a ticket has been updated

Resolving a ticket – Accepting or Rejecting a Solution

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

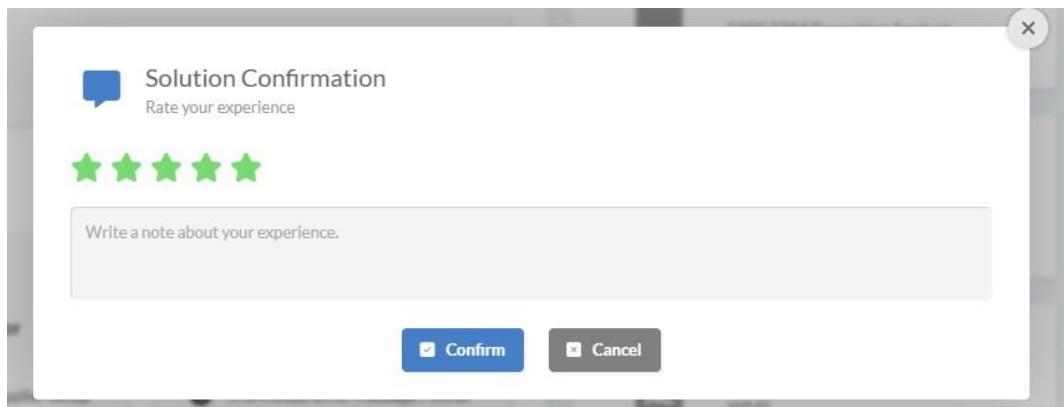


If the solution is accepted by the end-user, click the **Accept** button. If you would like to see more information on the call, click into the call from the list. The solution can be accepted from inside the ticket also:



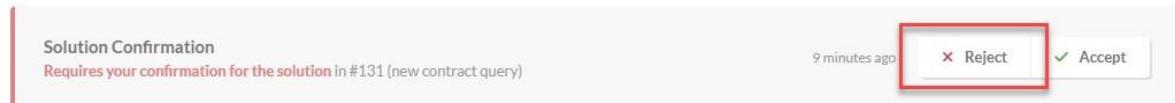
After you have accepted the solution, the ticket will be **closed**.

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

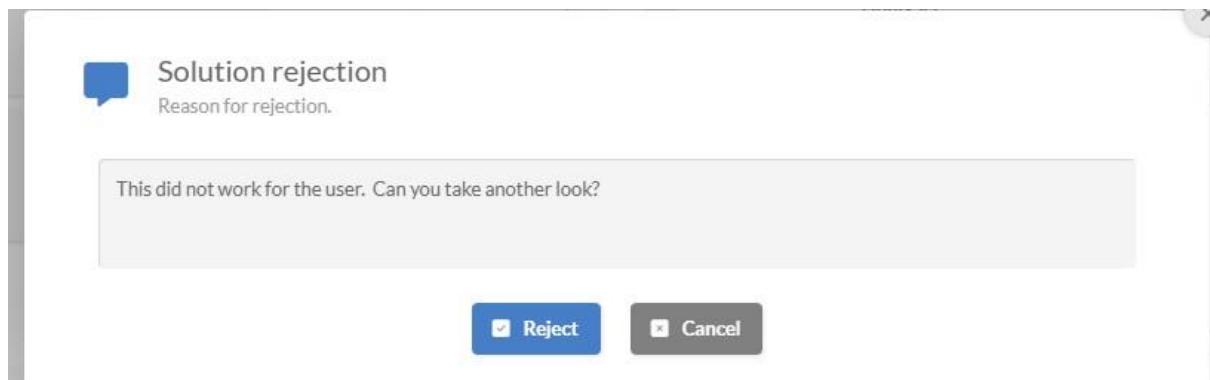


Rejecting a Solution

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**