

Viewpoint Customer Portal - Five Hidden Gems for Customer Success

The most popular feature of the Viewpoint Customer Portal is undoubtedly the knowledge base but today we wanted to share Five Hidden Gems or features that you may not know about that will make your work-life a little easier (we promise), including:

1. Track Cases & Issues
2. Case Details
3. Subscribe & Get Notifications
4. Product Resources
5. Knowledge Search Tips

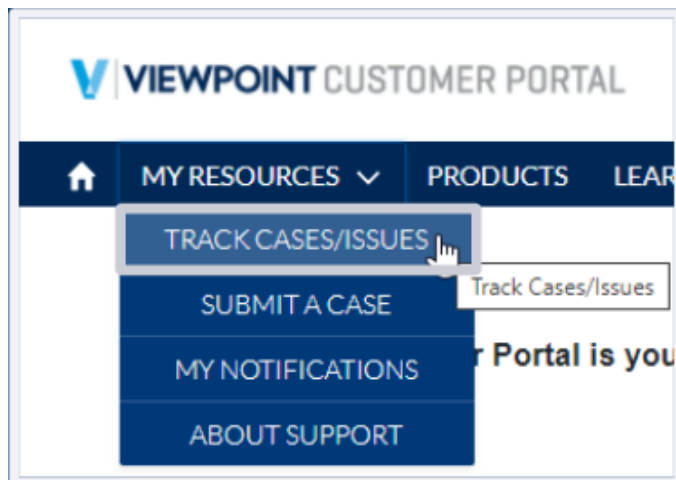
Hidden Gem #1 – Track Cases & Issues

Have you ever needed to check if a case is assigned to a Specialist? Or wanted to find information on a previous case to help with a current scenario?

Our first gem covers both of these situations.

The *Track Cases/Issues* page allows you to track all your support cases, and for “Full” Portal Users, all cases opened by anyone at your company. Software issues associated with your cases are also here.

We keep cases in the system for several years, so you can find an old one that might have exactly the information needed for your current situation.



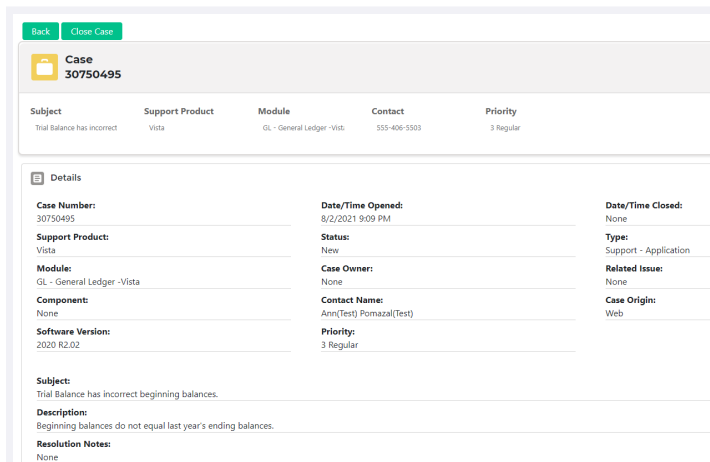
Hidden Gem #2 – Case Details

Continuing with the *Track Cases* page, our next gem encompasses the details available about your cases.

Click on any case to see various items, including:

- Status (New, In Progress, Waiting for Customer, etc.)
- Trimble Viewpoint team or Specialist who owns the case
- Any email exchanges or comments
- And more!

You can also comment on the case and add additional files. Finally, use the **Close Case** button at the top of the page if the case is no longer necessary.



The screenshot shows the 'Case Details' page for Case 30750495. At the top, there are 'Back' and 'Close Case' buttons. Below is a header for the case number. A table lists key information: Subject (Trial Balance has incorrect), Support Product (Vista), Module (GL - General Ledger - Vista), Contact (555-408-5503), and Priority (3 Regular). A 'Details' section follows, containing fields for Case Number, Support Product, Module, Component, Software Version, Date/Time Opened, Status, Case Owner, Contact Name, Priority, Date/Time Closed, Type, Related Issue, and Case Origin. At the bottom, there are sections for Subject, Description, and Resolution Notes.

Subject	Support Product	Module	Contact	Priority
Trial Balance has incorrect	Vista	GL - General Ledger - Vista	555-408-5503	3 Regular

Details

Case Number: 30750495	Date/Time Opened: 8/2/2021 9:09 PM	Date/Time Closed: None
Support Product: Vista	Status: New	Type: Support - Application
Module: GL - General Ledger - Vista	Case Owner: None	Related Issue: None
Component: None	Contact Name: Ann[Test] Pomaza[Test]	Case Origin: Web
Software Version: 2020 R2.02	Priority: 3 Regular	

Subject:
Trial Balance has incorrect beginning balances.

Description:
Beginning balances do not equal last year's ending balances.

Resolution Notes:
None

Hidden Gem #3 – Subscribe & Get Notifications

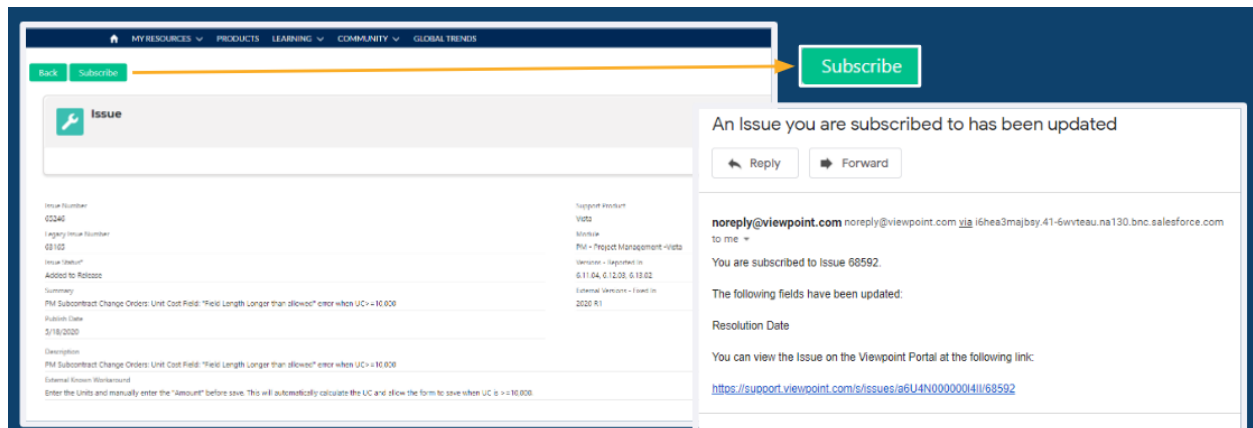
Consider the following scenarios...

You found the perfect KB article for your question but can't remember the title the next day or even find it again. Or maybe there is a software issue that is important to your company, and you want to be kept up-to-date on its progress.

If you're not familiar with the **Subscribe** feature, you may want to start using this gem right away.

From any article or issue, simply click the “Subscribe” button to add it to your list of notifications.

This means you can easily find the item again, and if there are updates, you will get an email notification that something has changed. Subscribing is a powerful and convenient way to stay on top of the articles and issues that are most important to you!

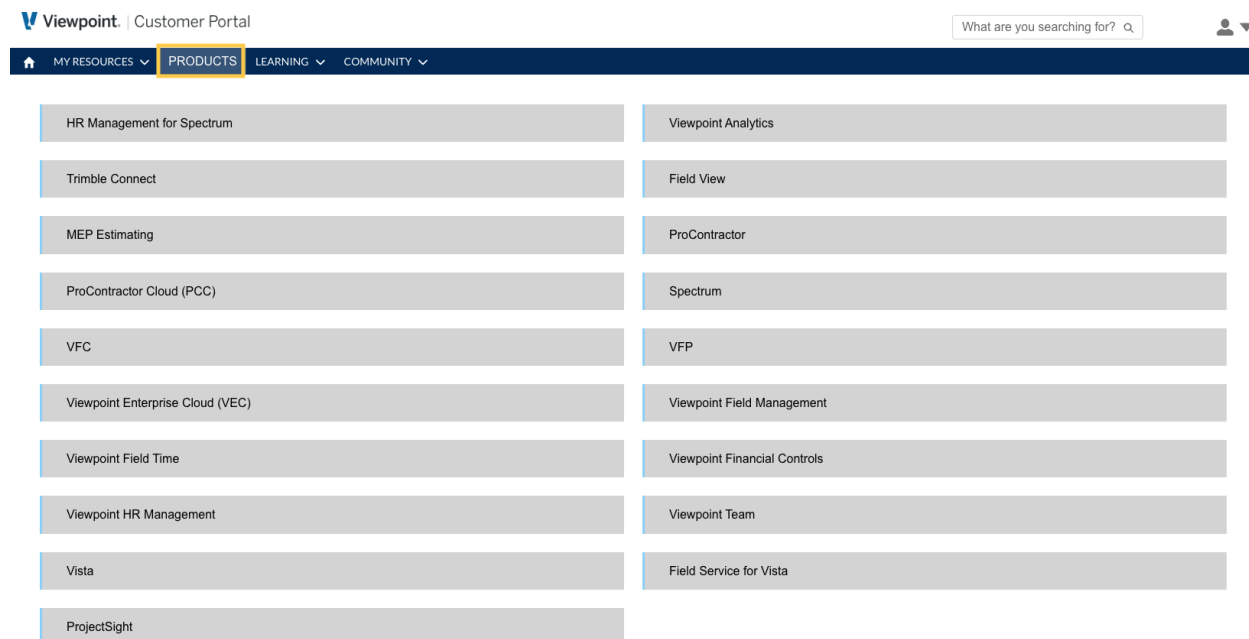


Hidden Gem #4 – Product Resources

This gem of a resource can help save time when searching for essential information.

The *Products* pages are curated by the Customer Support team and are updated regularly. Each software product has its own page where you can find available release downloads and service packs, important notifications, and recommended knowledge articles.

You'll also find assets such as Reference Guides, top software suggestions, a link to the Suggestion Box, and for ERP software products - necessary year-end resources.



The screenshot shows the Viewpoint Customer Portal interface. At the top, there is a search bar with the text "What are you searching for?" and a user profile icon. Below the search bar is a navigation menu with the following items: MY RESOURCES, PRODUCTS (highlighted), LEARNING, and COMMUNITY. The main content area displays a grid of product tiles. The tiles are arranged in two columns. The left column contains: HR Management for Spectrum, Trimble Connect, MEP Estimating, ProContractor Cloud (PCC), VFC, Viewpoint Enterprise Cloud (VEC), Viewpoint Field Time, Viewpoint HR Management, Vista, and ProjectSight. The right column contains: Viewpoint Analytics, Field View, ProContractor, Spectrum, VFP, Viewpoint Field Management, Viewpoint Financial Controls, Viewpoint Team, and Field Service for Vista.

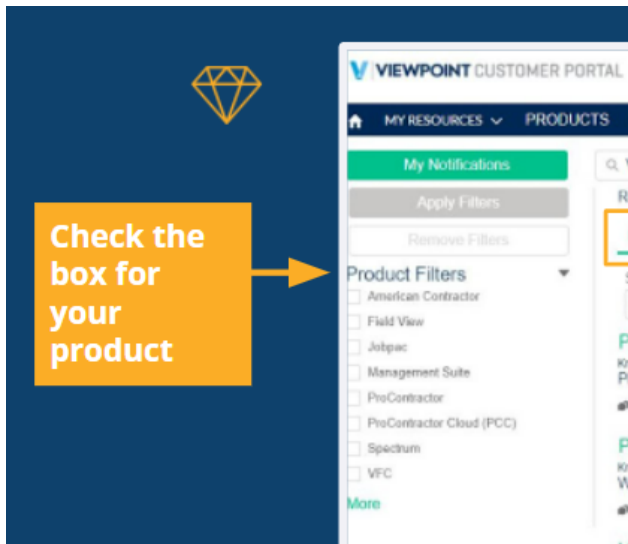
Hidden Gem #5 – Knowledge Base Search Tips

For our final “hidden gem,” we are diving into the Knowledge Base. The Viewpoint Knowledge Base, or KB, has tens of thousands of articles covering error messages, tips and tricks, and detailed steps for particular functions.

With a collection of this size, it can be tricky to find exactly what you need.

To start, enter a search term and perhaps the product name into the search box on the Portal. This searches all of the knowledge base content, known and published issues, and product information.

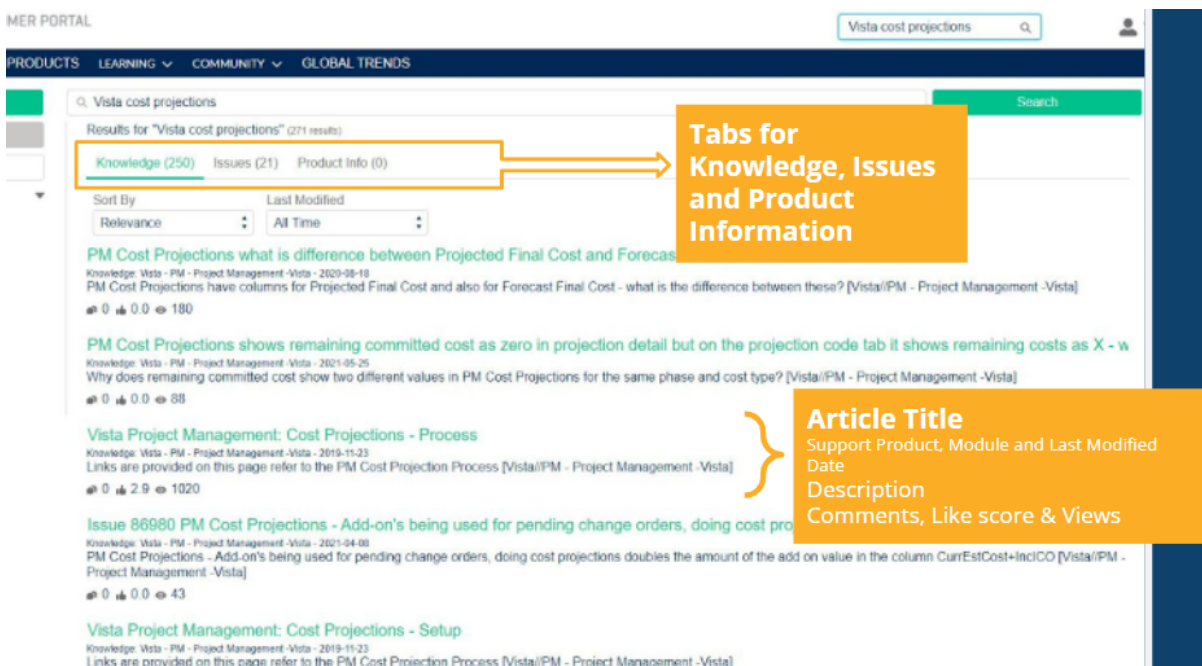
Now, initially, results may include multiple products. While adding the name of the software product to the search does help, using the additional **Product Filters** on the left panel ensures the articles in the list pertain to the software you are using.



Next, notice three tabs across the top of your results: *Knowledge*, *Issues*, and *Product Info*.

The number in parentheses indicates how many results exist for each type. When reviewing the list of articles, notice there are four sections of information to help determine if the article might be relevant.

First are the lines with title, product, module, and last modified date. The next section has a summary of the article, and finally, the bottom line lists comments, likes, and total views.





Once you find that indispensable article, remember our earlier “gem” and subscribe to it!

Well, that wraps up the Viewpoint Customer Portal – Five Hidden Gems for Customer Success. Keep an eye out for the next Customer Success Bulletin with more tips from Viewpoint Support!