Customer Service Portal
User Guide
April 2013

Contents

1.0 Getting Started

1.1 Logging In

To log into the customer service portal, enter your username and password in the appropriate fields on the portal login page. When logging into the portal for the first time, you will use the temporary password provided by Salesforce.com. Once you have logged into the portal, you will be prompted to create a new password.
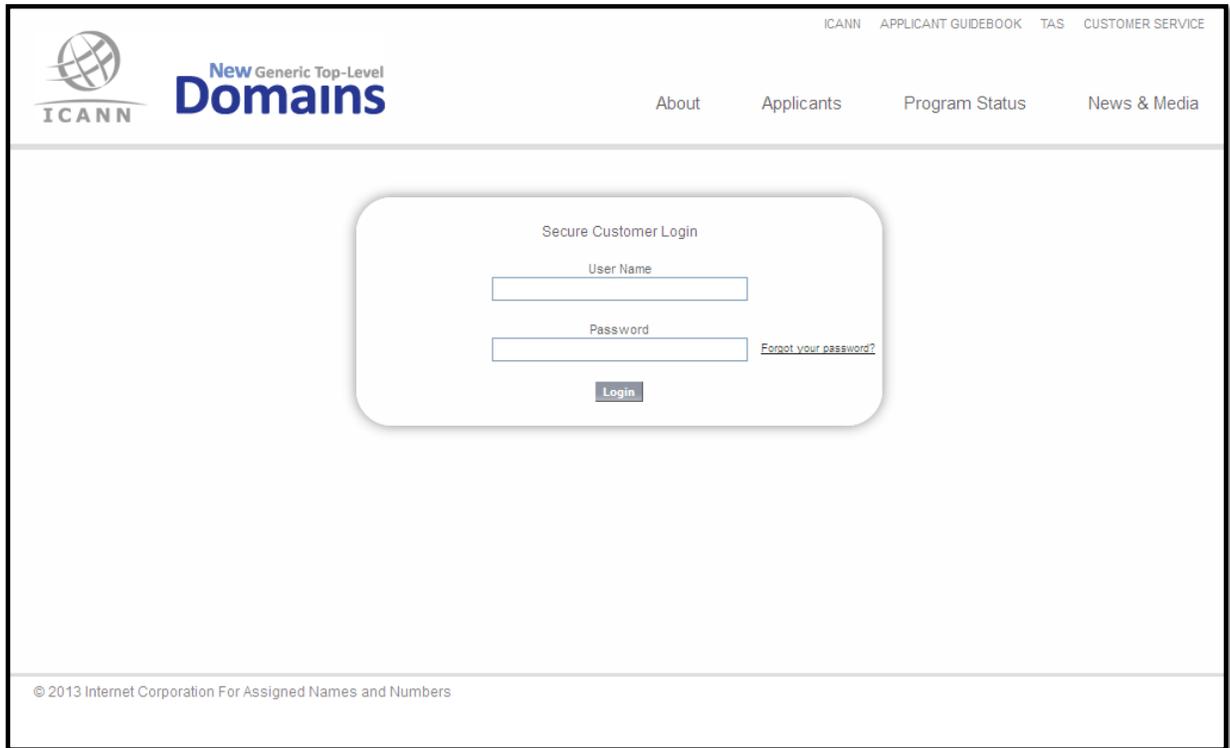
1.2 Retrieving your Password

If you forget your password, you may retrieve it by clicking the "Forgot Password" link located on the portal login page. When requesting a new password, the portal will automatically generate and email a temporary password, which will need to be changed upon logging into the portal.

1.3 Navigating the Portal

After successfully logging into the portal, you will be defaulted to the "Cases" page. On this page, you will be able to view recently accessed cases, search any cases, submit a note on an existing case, or create a new case.

If you wish to view the application information associated with your login credentials, you can click on the **Applications** link.

To log out of the portal, click on the **Logout** link, which is visible from any portal page.

2.0 Managing Cases

2.1 Viewing Cases

The cases homepage is defaulted to show your recently created/accessed cases. For other view options, click on the down arrow in the View drop down menu. Once you have selected your desired view, click the **Go** button.
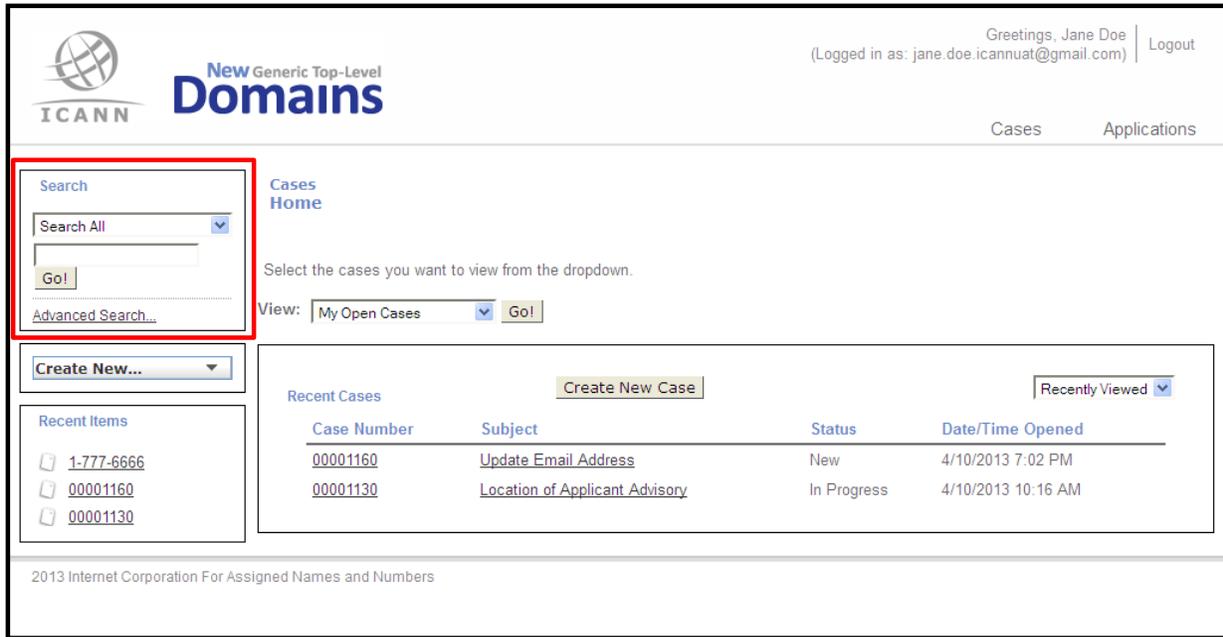

Note that your recent cases will always appear in the "Recent Items" section of the left panel.
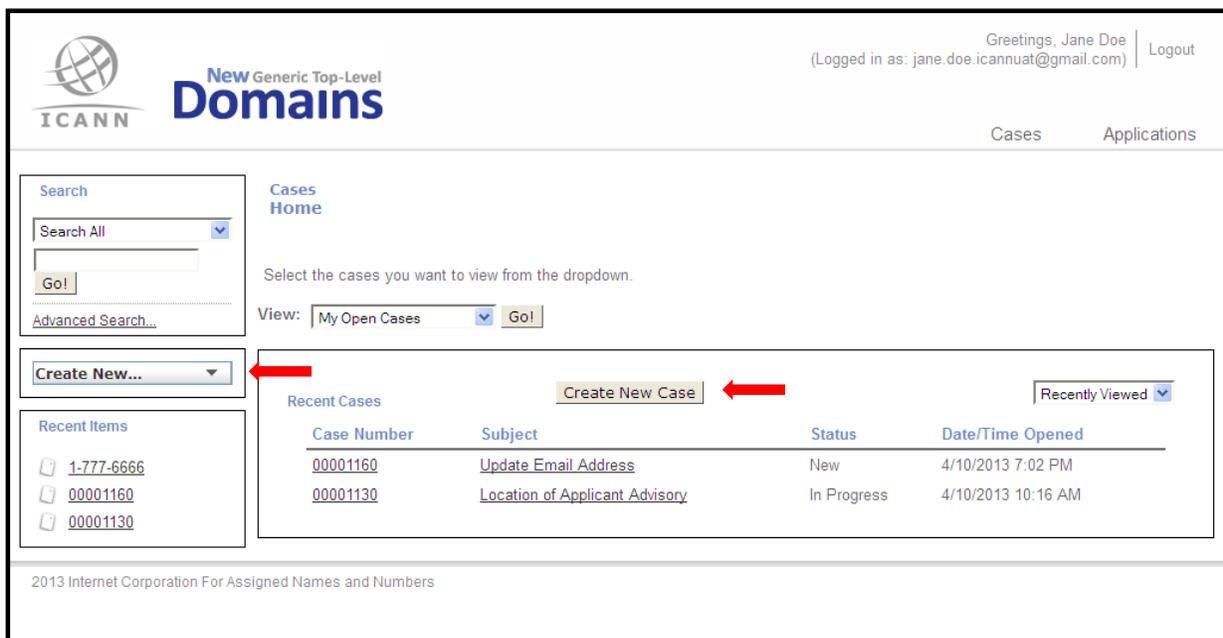
2.2 Searching an Existing Case

The best way to search for an existing case is to select "Case" from the **Search All** option from the Search drop down menu in the left panel, and click on the **Go** button.

2.3 Creating a New Case

You can create a new case from the "Cases" page, or from an application's detail page. To create a new case from the "Cases" page, click either the **Create New Case** button or select **Case** from the "Create New…" drop down menu in the left panel.

The "Case Edit" page will appear.

Step 1: If your case is regarding a specific application, click the **Lookup** icon next to the "Application ID" field. If your case is not regarding a specific application, skip to Step 3.

Step 2: In the "Search" field in the "Lookup" window, type the Application ID number associated with your case and then click the **Go** button. If you do not know the Application ID number, enter "*" in the "Search" field to pull up your applications where you are the Primary Contact. When you have located the application, click the Application ID.

Step 3: On the "Case Edit" screen, enter the subject of your case in the "Subject" field.

Step 4: Enter a detailed description in the "Description" field.

Step 5: To add an attachment to your case, click the **Submit & Add Attachment** button and follow the instructions outlined on the "Attach File to Case" page. If you are not including an attachment with your case, proceed to Step 6.

Step 6: Click the "Submit" button.

NOTE: If you need to add a comment to the case after you have submitted the case to our New gTLD Customer Service Center, please see section 2.4 of this user manual.

2.4 Updating a Case

Changes to a case may only be made from the case edit screen. To make updates or changes to a case, such as adding comments, attachments, or even cancelling a case, you must locate and select the case (see section 2.2). You cannot update "Closed" cases.

The figure below illustrates which buttons on the case edit screen can be used to add a comment, attach a file, and cancel a case.

A. Canceling a Case

Cases that are not closed (case status field is not "Resolve" or "Closed") may be canceled directly in the portal, simply by clicking the **Cancel Case** button located on the case edit page. Once cases are canceled, you will be unable to make any further edits to these cases.

B. Adding a Comment

After submitting a case through the portal, you can add a comment to the case simply by clicking the **Add Comment** button located on the case detail page. Upon clicking the **Add Comment** button, you will be taken to the "Comments" page where you can add detailed comments that you would like the customer service team to review. Once you have added your comment, click the "Save" button to submit the comment.

New Generic Top-Level
Domains
ICANN

Cases   Applications

Search

Search All ▼

[   ]

Go!

Advanced Search...

Create New... ▼

Recent Items

📄 00001160

📄 1-777-6666

📄 00001130

Comments
Case 00001160

Case Comment Edit   Save   Cancel

Case Details   ▌ = Required Information

Subject   Update Email Address
Description   Please change the secondary contact
               email address to
               jane.doe@gmail.com.

Comment Details

Comment   [   ]

               Save   Cancel

Case Comments

Comment

Created By: Jane Doe (4/10/2013 7:03 PM)
comment

Always show me ▼more records per related list

C. *Attaching a File*

Files may be attached to cases that are open by clicking the **Attach File** button on the case edit page. You will be taken to the following page where you can browse and attach files to your case:

Greetings, Jane Doe
(Logged in as: jane.doe.icannuat@gmail.com) | Logout

New Generic Top-Level
Domains
ICANN

Cases   Applications

Search

Search All

Go!

Advanced Search...

Create New...

Recent Items

- 00001160
- 1-777-6666
- 00001130

Attach File to Case 00001160

1. Select the File
Type the path of the file or click the Browse button to find the file.

Browse...

2. Click the "Attach File" button.
Repeat steps 1 and 2 to attach multiple files.
(When the upload is complete the file information will appear below.)

Attach File

3. Click the Done button to return to the previous page.
(This will cancel an in-progress upload.)

Done

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3.0 Managing Applications

3.1 Searching and Viewing Applications

To search and view your applications, open the "Applications" page by clicking the **Applications** link located at the top-right corner of your portal. You will be taken to the "Applications" home page where you can view your recently accessed applications.

To view all of your New gTLD applications, select **My gTLD Applications** from the "View" drop down menu and then click the **Go** button.

3.2 Creating a Case from the Application Detail Page

You can also create a new case from the "Application" detail page. By creating a case from a specific application, the "Application ID" field on the Case detail page will be auto-populated. To create this case directly from the application, click the "New Case" button located at the bottom of the Application details page.