EPLAN Solution Center-Customer Portal

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EPLAN Software & Service GmbH & Co. KG
Technical Information

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Introduction

Dear User,

The team at EPLAN Software & Service GmbH & Co. KG is pleased to introduce the customer portal of the EPLAN Solution Center.

This document describes the registration process for the Portal, the registration of support questions and the Knowledge Center. It provides additional information about our newly implemented system.

Notes for the reader

Before you begin reading, please note the following symbols and styles used in this document:

⚠ **Caution:**

Text preceded by this image contains a warning. You should be absolutely sure to read these notes before proceeding!

📌 **Note:**

Text preceded by this image contains extra notes.

ℹ **Tip:**

Useful tips to facilitate your interaction with the program are presented after this image.

💡 **Example:**

Examples are highlighted by this symbol.

Access Data

This chapter covers how you will receive your access data for the customer portal of the EPLAN Solution Center.

Please go to the EPLAN website then select **"Support > EPLAN Solution Center"**.

⚠️ Please note that this is not the user data for your EPLAN support account until now, but rather that you will need to set up new access data for the Portal.

Please use the same email address you have been using for your communications with EPLAN Support for your registration. Your login data for the customer portal of the EPLAN Solution Center will be sent to the email address entered, after you click *[Send]*.

Haven't an account yet?

Please enter your email address for registration

Email Address example@mail.com

▸ Register

📌 The fields will be emptied after the registration question has been sent.

⚠️ Please note that any communication from the EPLAN Solution Center will be sent to the email address listed as your contact address with EPLAN Software & Service for your company.

If your email address should not be in our system yet, you will be asked to enter additional information.

Haven't an account yet?

Please enter your email address for registration

Email Address example@mail.com

Customer Number:

Service contract no.:

▸ **Register**

The customer number and software service number can be found on your last invoice or on your software service contract.

You will receive an immediate response at the email address provided.

The sender will be "EPLAN Solution Center", mail delivery will be handled by our partner Salesforce ®.

Von: EPLAN Solution Center ⊕   03.03.2014 um 11:31 Uhr ⓘ

Dear customer,

You have registered for the EPLAN Solution Center. Please use the following link to complete your registration:

http://service.eplan.de/sf/?
email=eplan07%40web.de&payload=fc6085255a9fca739db250749a9a58bf&langParam=UK&a=MDAxRDAwMDAwMHpQTW1GGSUFX

Sincerely

Your EPLAN Helpdesk Team

A direct response to our email will not be possible.

Please fill in the fields for registration.

Email Address example@mail.com

Salutation Mr. ▼

Academic title Dr.

Name Doe

Firstname John

Phone no. +1 123 456

Mobile +1 789 012

Language ❓ English ▼

Department R & D

Notes ponsible for parts management |

▶ Register

📌   Use the "Language" dropdown to select your specific "Contact language". All "EPLAN Solution Center" e-mails will be sent in this language and will not affect the "Customer Portal Interface language".

You will receive an immediate response at the email address provided.
The sender will be "EPLAN Support".

 A direct response to our email will not be possible.
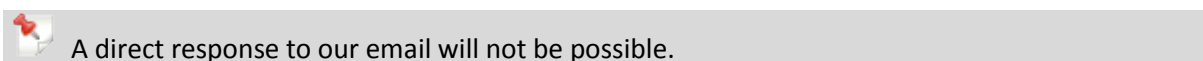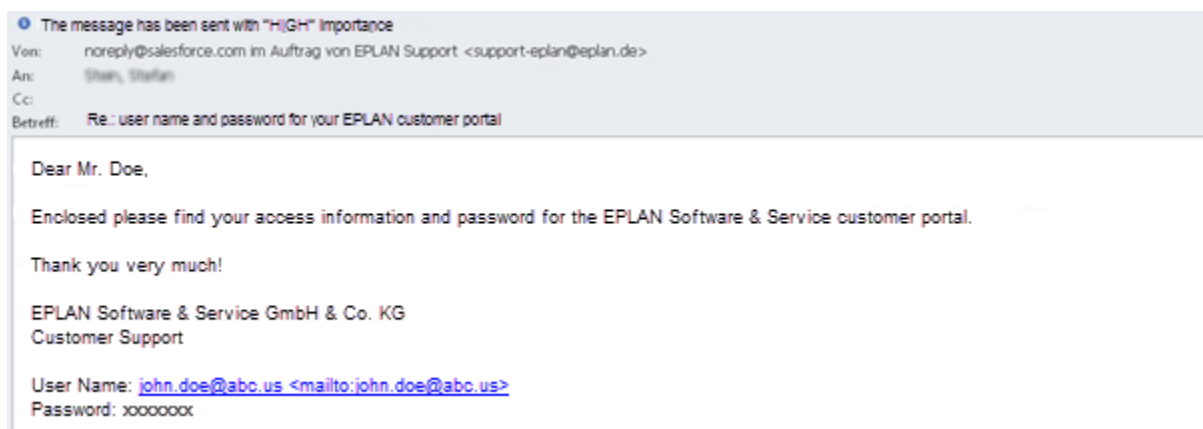
This email will provide you with a temporary password for your first login to the Customer Portal.

Enter the user name and password listed in the email and then click the *[Login]* button.

Tip: If you should ever forget your password you can use this dialog to question a new password.

You will then be asked to enter a new password to access your account and to confirm it.

For security reasons, your password must now be changed. Your password was last changed or reset on 28.05.2013 15:58

Change My Password

Password Information		▌ = Required Information
User Name	muster.p@abc.de	
New Password		
	Use at least 8 characters and include a combination of letters and numbers.	
Verify New Password		
	Save	

The password you chose will be checked for security in this dialog.

Change My Password

| **Password Information**		▌ = Required Information
User Name	muster.p@abc.de	
New Password	••••••••	
	Strong Your password is strong. It contains a mix of uppercase and lowercase letters, numbers and at least one of these special characters: !#$%-_=+<>	
Verify New Password	••••••••	✓
	Save	

The Home Page

A horizontal menu bar provides navigation options to the individual areas of the portal on the homepage of the EPLAN Solution Center.
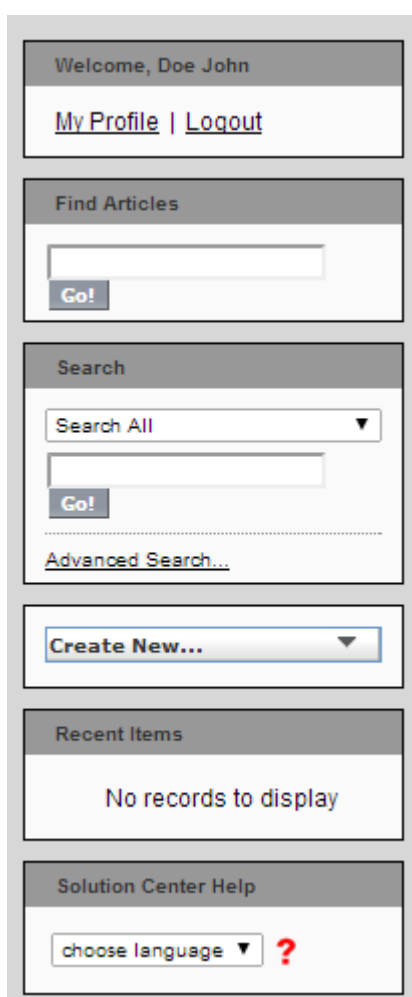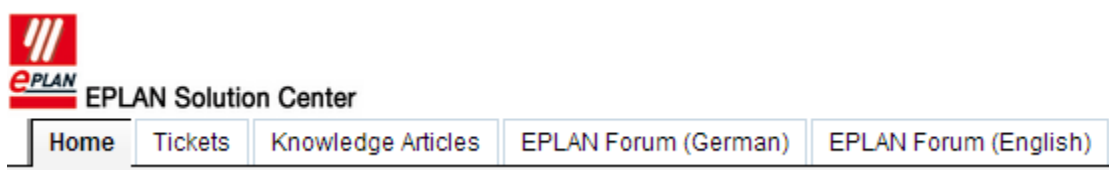
Use the vertical menu bar to search for your existing support ticket, create new tickets, or call up the most recently used elements. You also have the option of searching for articles in the Knowledge Center or to edit your profile.

In your profile, you have the option of changing the Portal interface language.
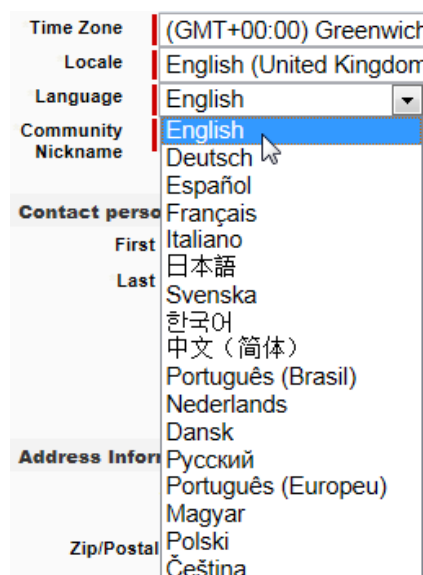
Search for a solution

All words in the search string are OR combined
Sample: Search for **Terminal Parts list,** the result will list articles containing the word Terminal, articles containing the word parts, articles containing the word list and all available combinations of these words.

A search for **Terminal and Parts and list** will search for all articles containing all three words in any order.

"Terminal Parts list" will search for the exact search string.
Two additional functions are implemented in the search, Tokenization and Stemming.
Tokenization breaks down all searchable text into smaller pieces at spaces, punctuation, and alphanumeric boundaries.

Sample:

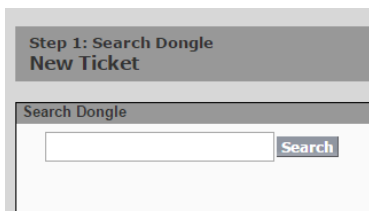| Search String	Searching for
web2lead	Web, 2, Lead
Andreas Test	Andreas, Test
www.google.com	www, google, com

Creating a Support Ticket

Please use the *[Create]* button in the vertical menu bar to set up a new support question.
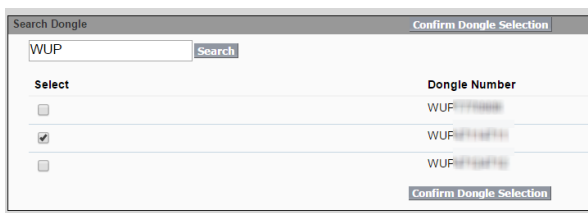
⚠️ Please note that you will need to enter your valid dongle number, the product and the version of the product. This information is available in the menu *Help > About* of your EPLAN product.

Step 1: Enter the dongle number you want to create a ticket for.

Step 1: Search Dongle
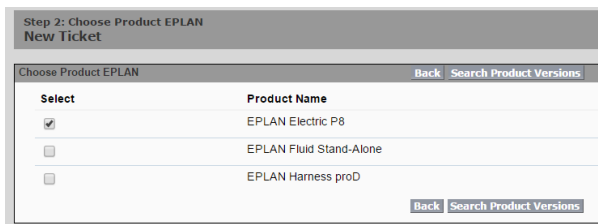**New Ticket**

Search Dongle

[ ] Search

If you only have inserted part of your dongle number you will get all matching licenses. Please select the dongle number you want to create a ticket for.
Then click "Confirm dongle selection".

Search Dongle   Confirm Dongle Selection
WUP   Search

Select   Dongle Number
[ ]   WUP
[✓]   WUP
[ ]   WUP
                                 Confirm Dongle Selection

Step 2: Select the product, and click "Search for product versions".

Step 2: Choose Product EPLAN
New Ticket

Choose Product EPLAN   Back Search Product Versions
Select   Product Name
[✓]   EPLAN Electric P8
[ ]   EPLAN Fluid Stand-Alone
[ ]   EPLAN Harness proD
                                   Back Search Product Versions

Step 3: Select the matching product version and click "Go to ticket".

Enter a brief description in the *Subject* field, and then describe all the details of your support question in the *Description* field.

⚠ If you have more than one question, please generate a separate ticket for each.
Group tickets have been known to create long response times, because the processing time of all questions will be dictated by the one taking the longest.

You are able to specify your support question even better by entering the build no. as well. The *[Submit]* button will transmit your support question to EPLAN Support.

ℹ️ You can check the status of your support question on the *[Ticket]* tab and on the homepage at any time.

If applicable, the EPLAN knowledge center may open directly after sending your support question. You will be shown articles relating to keywords of the support question you just submitted.
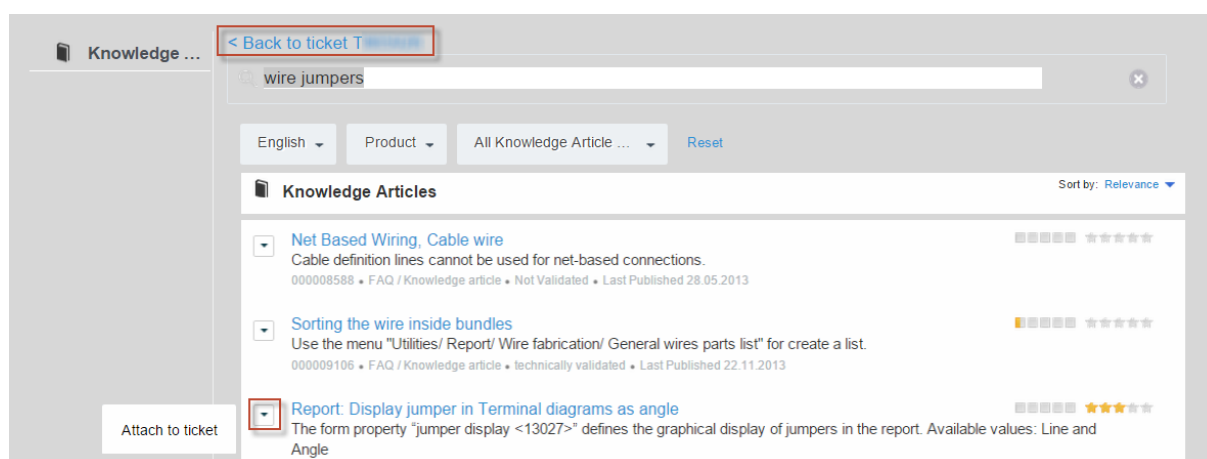
The knowledge center article for the respective entry can then be opened with one click on the link or attached to the ticket.

Ticket Number	T771438		Status	new
Date/Time opened	29.05.2013 13:25			
Subject	Supress wire jumpers in terminal diagram			

Does this knowledge article solve your issue? [Yes, close my ticket] [No, keep my ticket open]

Is it possible to output a terminal diagram without wire jumpers?   Printable View

Rate This Knowledge Article ☆☆☆☆☆ (Average Rating: No Rating)   Language [English ▼] Show Properties

Question Is it possible to output a terminal diagram without wire jumpers?
Reason
Solution Yes, it is possible to output a terminal diagram without wire jumpers.
Please edit the form properties and set the property **Jumpers: Number of levels** to "0" (zero).
Proceed as follows:

Editing the form properties

The **Form properties** - dialog is automatically opened when creating a form; it can also be called up for an opened form after the event.

Prerequisites:

- You have opened a project.
- You have opened a form in the form editor (**Utilities > Master data > Form > Open > [Open]**).

1. In the **Page** - navigator dialog, select the form whose properties you would like to view or edit.
2. Select **Popup menu > Properties**.
3. In the **Form properties** - dialog, select a different form type from the drop-down list, if necessary

If you should resolve your own question with the information gained from the knowledge center, you are able to close the support ticket yourself.

Please use the *[Close ticket]* button in the ticket for that purpose and enter a brief comment for the solution.

Close Ticket

Ticket Edit   [Submit] [Cancel]

Ticket Information   ▌ = Required Information

Status [closed ▼]
Solution Comment ⓘ ▌ The solution was found in one of the articles from the knowledge center

[Submit] [Cancel]

With the button *[Submit]* your support question will be closed.

After sending a support question you have additional functions available to you at the ticket.

⚠ Please note that you will have to select the ticket again to use them.

In the following steps you can add comments, check for applicable articles in the knowledge center and attach files.

Comments:
You may use the comments to communicate with the support team without changing the ticket status or the support process itself.
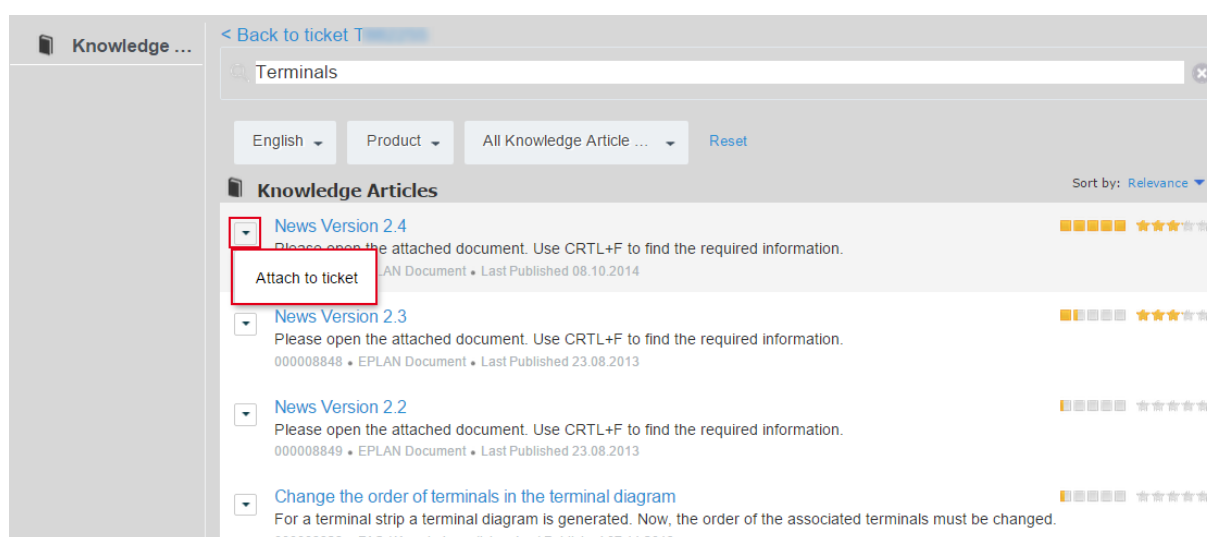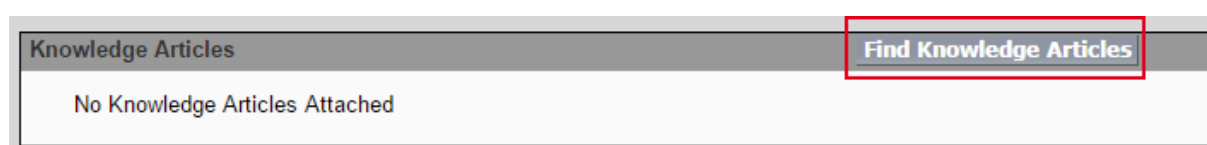
After a comment has been saved it can be seen in the ticket in the Portal and is also visible to the EPLAN support team.

ℹ️ Entering a comment on a ticket which is closed already will reopen it automatically.

Knowledge center articles can be selected from within a ticket and may be added as an attachment to the ticket.

The knowledge center article then appears at the ticket.

You can also attach files to a ticket, which may be necessary to process your support question.

Click the *[Attach files…]* button.
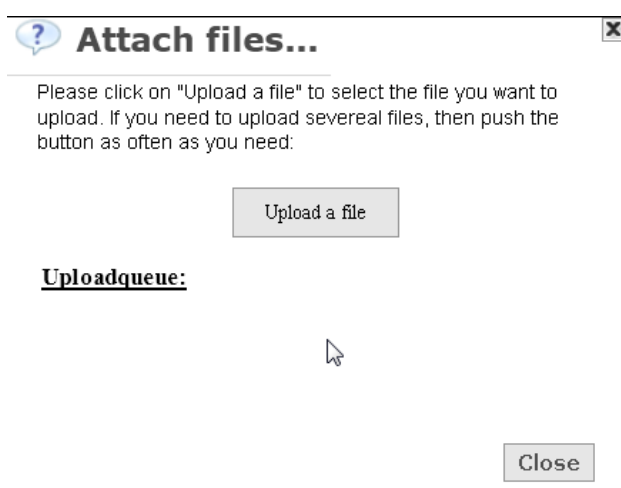
The dialog opens with a click on the *[Upload a file]* button, where you can select the desired file.
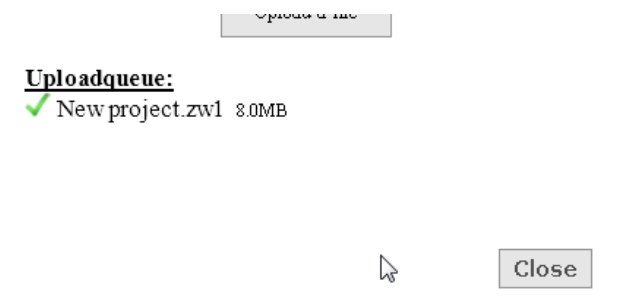
After the upload is complete, the file will display in the dialog. Click *[Close]* to close the dialog.

The uploaded file is now attached to the ticket and thereby is available to the EPLAN support team.

	Public	Filename	Size	Uploaded by	Create date
☐		**Attachments**	Dateien anhängen		
☐	☑	📄 New project.zw1	7.97MB	Peter Muster ()	2012-12-04 13:51:23

ⓘ Once a ticket has been closed, you will no longer be able to upload files.
By adding a comment, the ticket will reopen automatically. Then upload a file.

Creating a support question from the EPLAN platform

The easiest way to find your solution is to create a ticket directly from the EPLAN platform via **Help > Create EPLAN support question**.

To be able to use this function,you must:

- be registered at the EPLAN Solution Center

- have enterd **Customer number** and **E-Mail** in the dialog **Options > Settings > User > Display > User code / address**
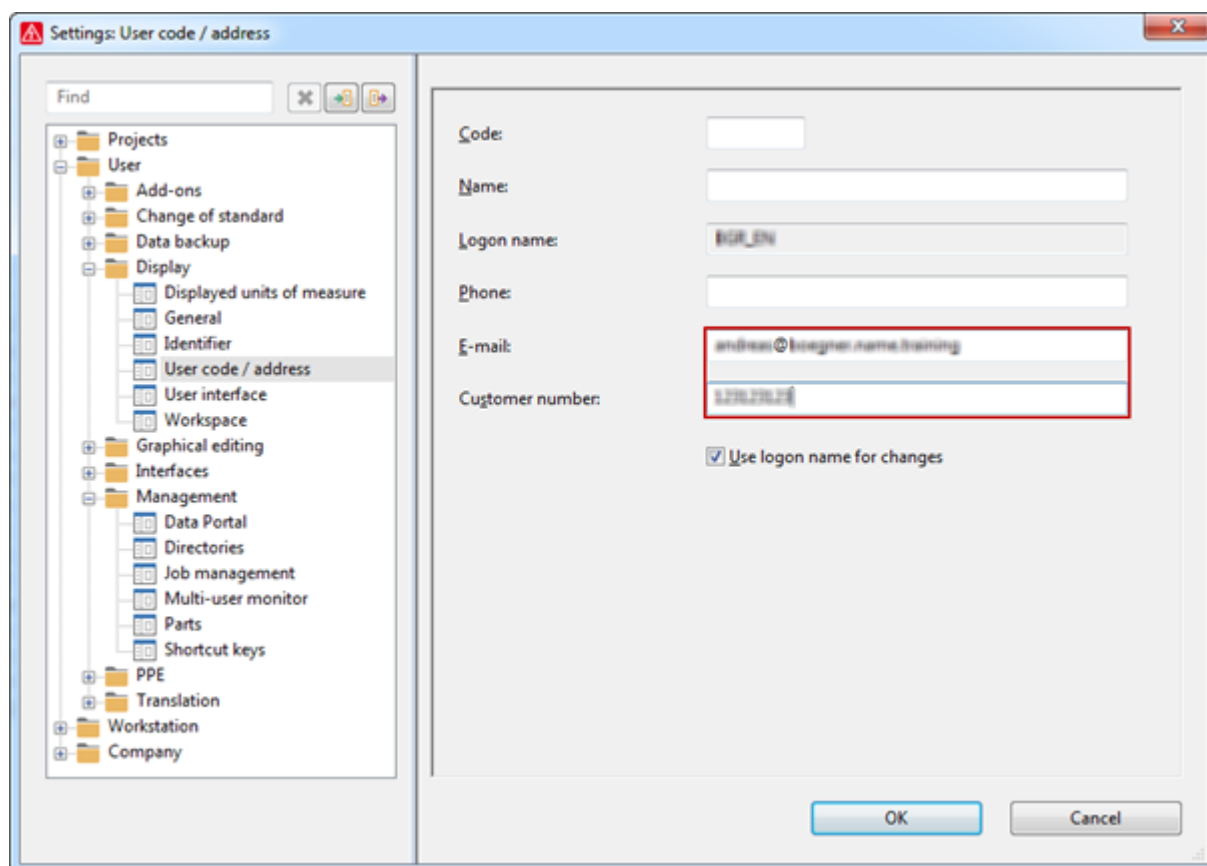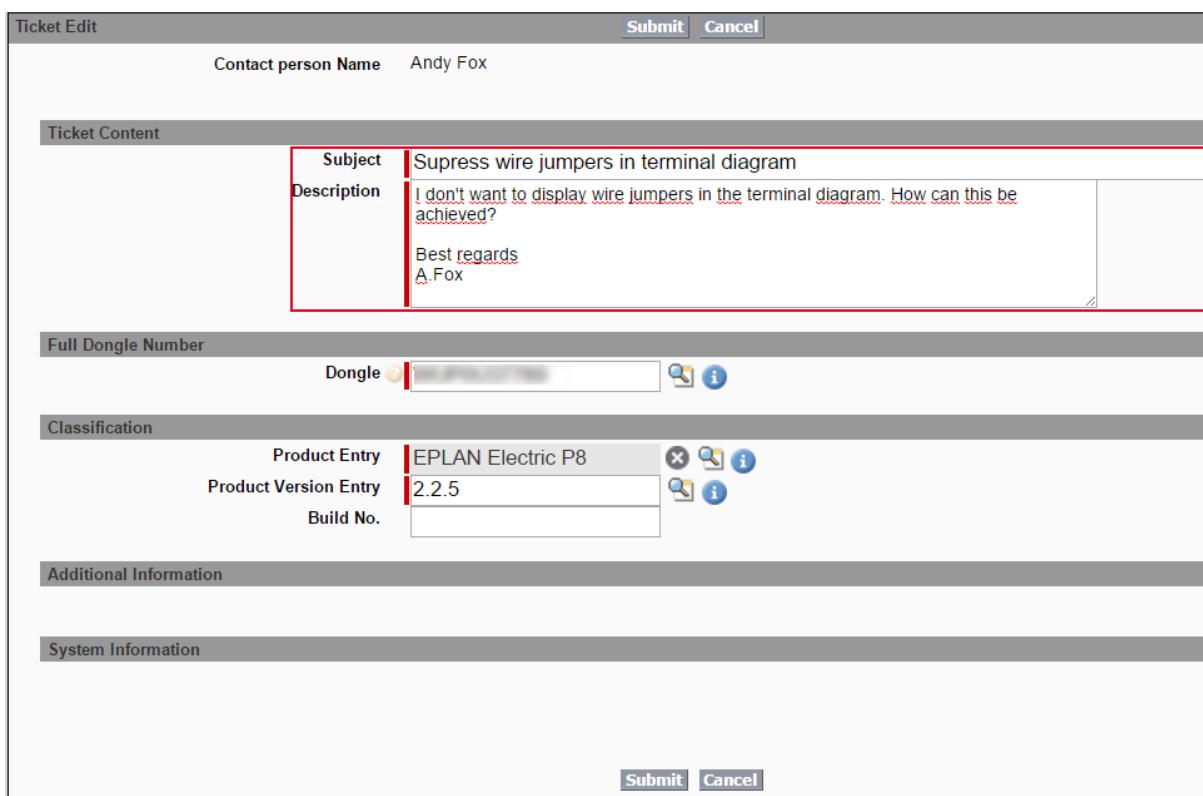
While creating an EPLAN support question via the software, EPLAN adds helpful information of your installation to the case.
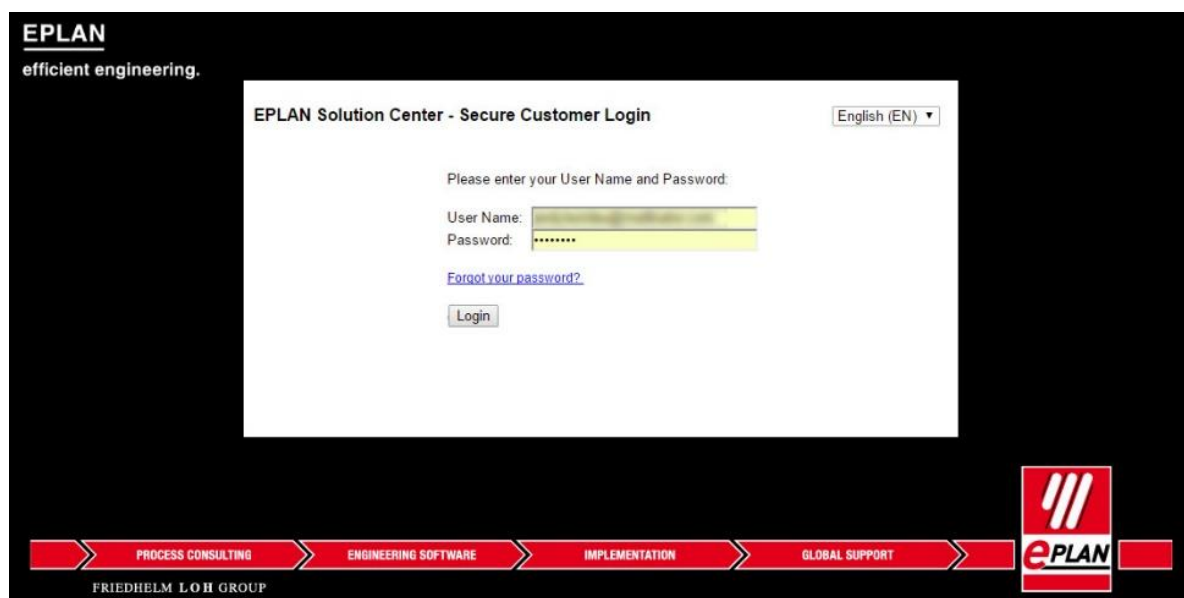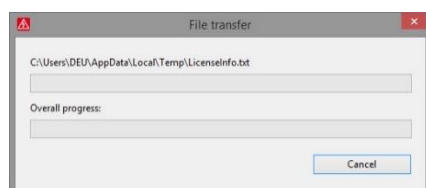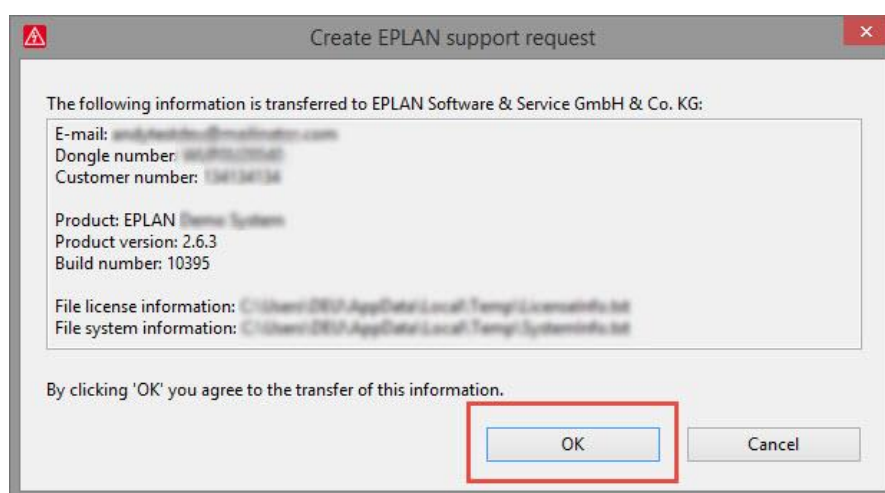
EPLAN always asks if the information should be transferred.
Only if this is acknowledged the ticket can be created after you have logged in.

Most of the fields are filled in automatically while creating the ticket.
Please describe your question in the area **Ticket content**.

The field **Subject** of the ticket will be used to find solutions within our knowledgebase, therefore please try to add a meaningful subject in this field.
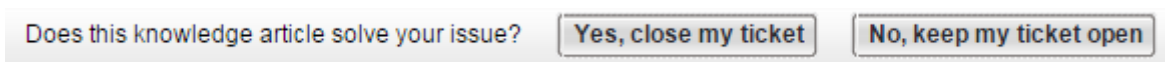
Finally the ticket needs to be submitted.
The EPLAN support team will contact you as soon as possible.

Please take advantage from the knowledge articles the system offers you.
If one of them answers your case, you can close it on your own.

The Knowledge Center

The EPLAN knowledge center is an integral part of the EPLAN Solution Center.
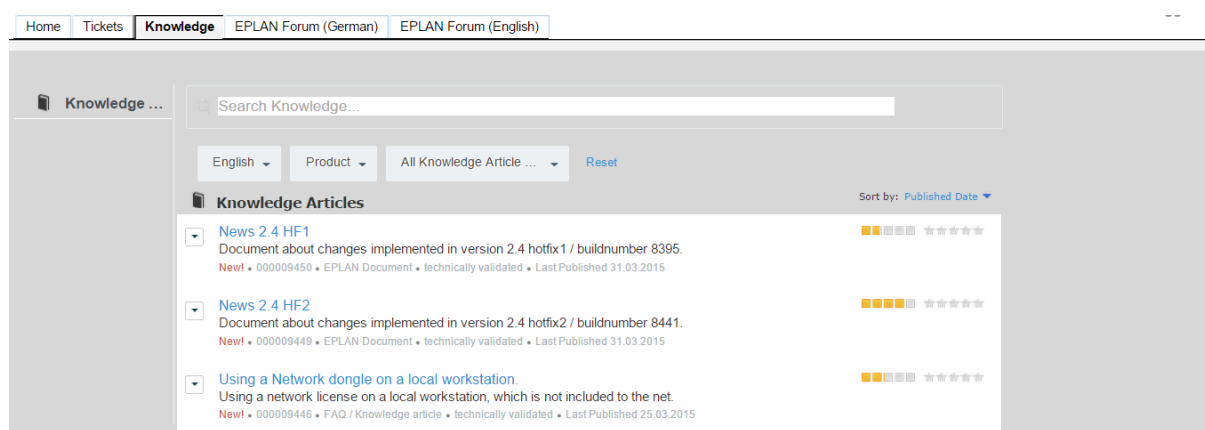
When creating a new ticket you will be offered possible applicable articles from the knowledge center. But you can also access these knowledge documents on your own without having an actual support ticket open.

To do that, enter a term in the search field and select the range of the search for appropriate articles in the EPLAN Knowledge Center.

You have the option to narrow down your results by applying filters for the product and the language.
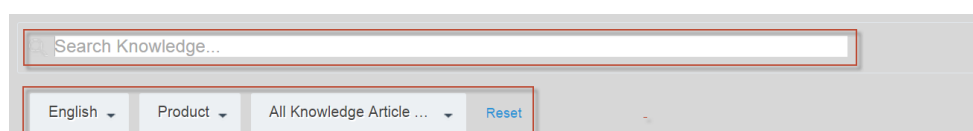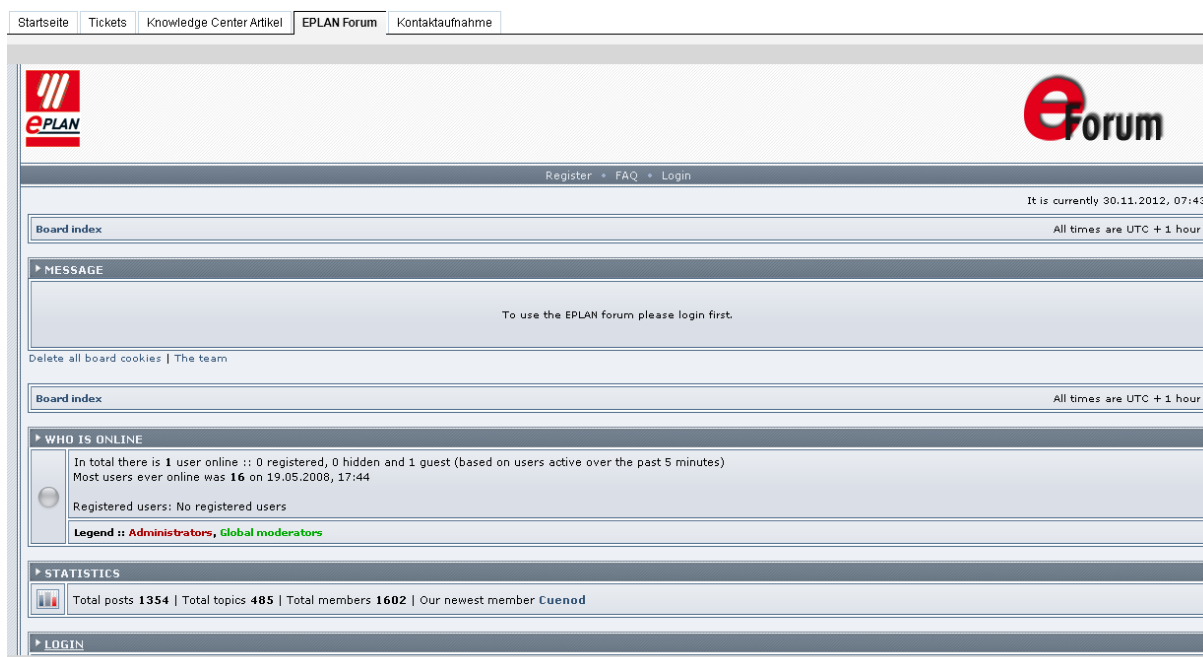
You have the ability to evaluate the content of an article once it has been opened.
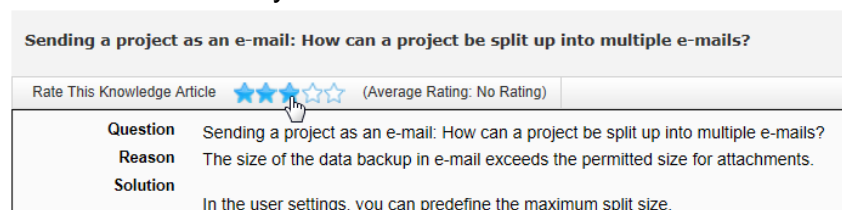
To do this, simply click on the number of stars corresponding to your opinion.

The EPLAN Forum

You can also access the EPLAN forum from within the EPLAN Solution Center.

⚠ Please note that you will need to set up a separate access to the EPLAN forum, it is not the same as the user data for the EPLAN Solution Center.