

# Quick User Instructions for Fox Robotics Customer Portal

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## Accessing the Customer Portal

- Open a browser to [foxrobotics.zendesk.com](https://foxrobotics.zendesk.com)
- Enter the user credentials you created when you first signed up for the Customer Portal
  - o Email
  - o Password
- If you've forgotten your password, please utilize the link on the login page. Note you will need access to the email address associated with the account to reset your password

Sign in to Fox Robotics  
[Switch to agent sign-in >](#)

Email

Password

[Forgot password?](#)

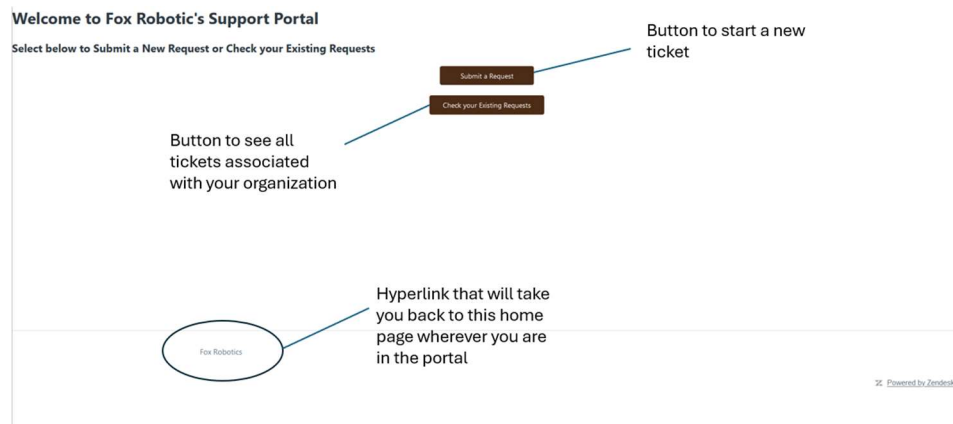
[Sign in](#)

Emailed us for support? [Get a password](#)  
New to Fox Robotics? [Sign up](#)

# Home Screen: Critical Parts

There are 3 buttons on the Home Screen:

1. Submit a Request
  - a. Takes you to the page to submit new requests to Fox Robotics
2. Check your Existing Requests
  - a. Takes you to the page where you can view all the tickets that have been submitted by you, or by your Organization
  - b. You can also enter new information on this page
3. **Fox Robotics** hyperlink at the bottom of the page
  - a. This button is available on all pages in the Customer Portal and will return you to the home page



## Submit a Request

- On the Customer Portal home page, select **Submit a Request**
- On the next page, select the type of request that you are submitting from the drop down menu
  - o **Fox Robotics Issue Report**
    - Used to submit a trouble report for the robot, general questions about how to use the robot, or anything you may require assistance with
  - o **Fox Robotics Site Configuration Request**
    - These tickets are used if you'd like to have a change made to the basic configuration of the site
      - Example: Add a door to the Fox Robotics work area

## Submit a request

Please choose your issue below



A screenshot of a dropdown menu. The menu is open, showing three options: a hyphen (-), "Fox Robotics Issue Report", and "Fox Robotics Site Configuration Request". The "Fox Robotics Issue Report" option is currently selected and highlighted.

- The form you choose will determine the options available when creating your ticket

## Fox Robotics Issue Report Fields:

(\* = required field)

- Organization \*
  - o By default most endusers will only be associated with a single organization
  - o If you are a person responsible for multiple organizations, please select the correct option to submit a ticket

## Submit a request

Please choose your issue below



A screenshot of a dropdown menu. The menu is open, showing one option: "Fox Robotics Issue Report". The option is currently selected and highlighted.

Organization



A screenshot of a dropdown menu. The menu is open, showing two options: "Fox Zendesk Test Organization - 1" and "Fox Zendesk Test Organization - 2". The "Fox Zendesk Test Organization - 1" option is currently selected and highlighted.

- 
- Subject\*
  - o Brief description of the problem or question

- Severity
    - This code will determine the SLAs and prioritization of a given issue. The code is defined by contractual agreement. If an incorrect priority is selected, the Fox Robotics Support Team will adjust it when we take ownership of the ticket. This is an optional field.
  - Description
    - This field is used for any details that may be required to further define the issue. This is an optional field.
  - Name of your site \*
    - Please identify the site you work with
  - Robot(s) Number\*
    - Please identify the number of the robot that the report is about. If there are multiple robots, please include them all.
    - If the issue is a site wide problem that is impacting all robots, please identify ALL.
  - Is the robot(s) operational?\*
- Required Yes/No dropdown option
- Name of Requestor\*
  - Who is submitting the ticket
- Preferred Contact Method\*
  - Please identify if you'd like to be contacted for this issue via email, phone or texting
- Email of Requestor
  - Email address you'd like to be contacted at concerning this issue
- Phone Number of Requestor
  - Phone number you'd like to be contacted at via voice or text concerning this issue
- Attachments
  - Any photos or information you'd like to add to the report to help define the problem reported
- SUBMIT
  - Pressing this button will generate a ticket for Fox Robotics
  - Please note that if required fields are missing, the ticket will not submit

## Fox Robotics Site Configuration Request:

(\* = required field)

- Organization \*
  - o By default most endusers will only be associated with a single organization
  - o If you are a person responsible for multiple organizations, please select the correct option to submit a ticket

### Submit a request

Please choose your issue below

Organization

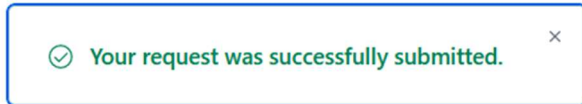
  

Please tell us which organization you would like this request associated with. You can change this later.

- Name of Requestor\*
  - o Who is submitting the ticket
- Subject\*
  - o Brief description of the requested change
- Description
  - o Please provide as much detail as possible on the nature of the change that is being requested.
- Preferred Contact Method\*
  - o Please identify if you'd like to be contacted for this configuration request
  - o via email, phone or texting
- Email of Requestor
  - o Email address you'd like to be contacted at concerning this configuration request
- Phone Number of Requestor
  - o Phone number you'd like to be contacted at via voice or text concerning this configuration request
- Attachments
  - o Any photos or information you'd like to add to the report to help define the configuration request
- SUBMIT
  - o Pressing this button will generate a ticket for Fox Robotics
  - o Please note that if required fields are missing, the ticket will not submit


## Successfully Submitted Ticket

- Once you have submitted a ticket successfully, the system will take you to a new page that shows you the information for the ticket. The system will give a notification that your request was successfully submitted.




- 
- Comments can be added to the new ticket immediately and will be seen by a Fox representative.

### Test Ticket - Customer Portal Issue Report Test

 Testing Joshua Pack  
a few seconds ago

This ticket is a test

 Add to conversation

Requester	Testing Joshua Pack
Created	Today at 16:40
Last activity	Today at 16:40
<hr/>	
Id	#140
Organization	Fox Zendesk Test Org
Status	Open
Severity	S2
Name of your site	Test Site 1
Robot(s) number	1234
Is the robot(s) operational	Yes
Estimated time of the incident	1:15PM EST
Name of Requestor	Joshua Pack
Preferred Contact Method	Phone
Email of Requestor	—
Phone Number of Requestor	833-954-1965 ext 2

# Check your Existing Requests

## List of Request Page Layout and Controls

The screenshot shows the 'Requests' page layout with several callouts:

- My requests**: Lists all the requests under your name.
- Requests I am CC'd on**: Lists all the requests you've been CC'd on.
- Organizational requests**: Lists all the requests for your organization.
- Filter**: Allow you to filter the requests in the view.
- Link to the ticket**: Link to the ticket that will allow you to see and add comments on a single ticket.
- Action tool**: This action tool will allow you to add different sortable columns to your ticket view.
- Columns**: A list of columns to show and hide: ID, Created date, Updated date, Status, Severity, and See more columns.
- Hyperlink**: Hyperlink that will take you back to this home page wherever you are in the portal.

Subject	ID	Created date	Updated date	Status	Severity
<a href="#">I'd like to add a new door to our site</a>	#141	Apr 27, 2024	4 minutes ago	Open	-
<a href="#">Test Ticket - Customer Portal Issue Report Test</a>	#140	Apr 27, 2024	4 minutes ago	Open	S2
<a href="#">Test Ticket - Portal testing</a>	#60	Apr 23, 2024	52 minutes ago	Closed	S4

## My Requests

- This view shows you all requests that you have submitted, or have you listed as the primary contact

## Requests I'm CC'd on

- This view shows you all requests opened by other individuals that you've been CC'd on

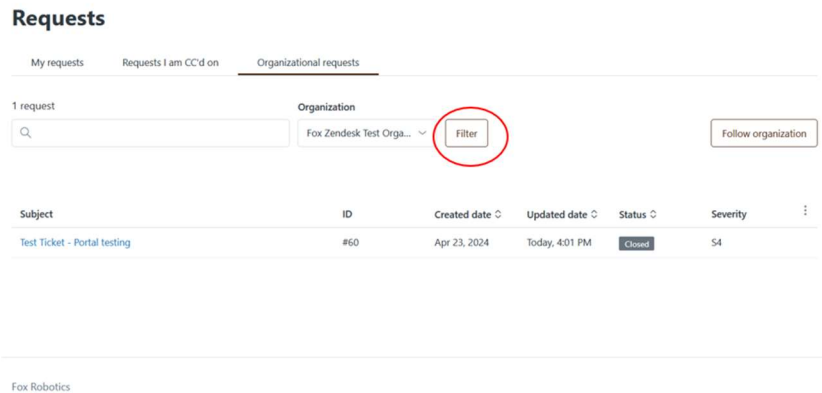
## Organizational Requests

- This view shows you all requests that have been submitted by your anyone in your organization
- NOTE: If you are a member of multiple organizations, you will need to select the organization you'd like to see from a drop down. This tool will not allow you to see all sites simultaneously. This functionality will be provided in a different tool. If this is a requirement for you, please reach out to your Customer Success Manager for more details.

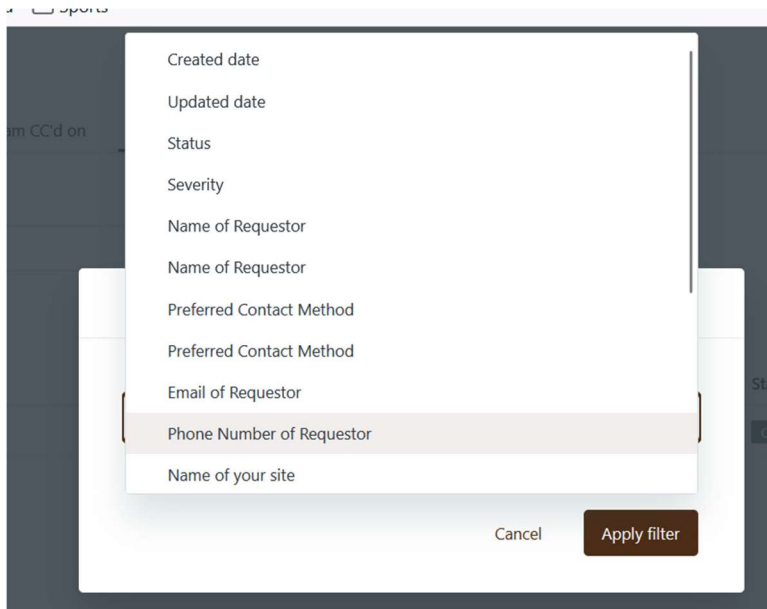


## Filtering your request view

- By default, the system will provide you with a view of all tickets that have been created. You can further filter this view to organize the data to your liking
- To filter, click the **Filter** button



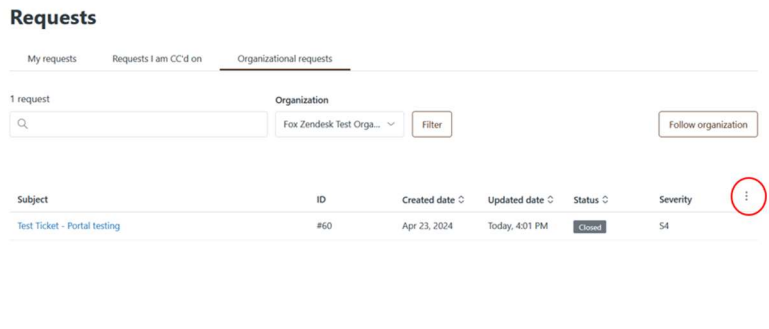
- You will be presented with a series of options. Select the option you would like to filter by and select **Apply Filter**
  - o Note, some filters will provide you with a second option to further refine your data view



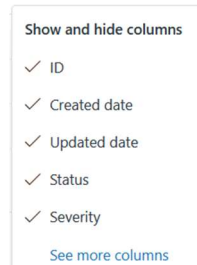
## Adding Data Columns to the View

By default, the Customer Portal presents a very limited set of data when you first begin using it. These columns can be customized to suite your needs. To add new columns of data to your views:

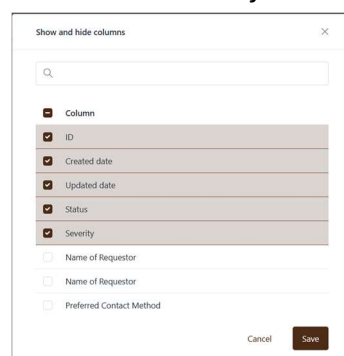
- Press the 3 dot action button at the top right of your views



- When you select the action button, you will be shown a list of the columns currently shown
  - o If you'd like to hide an active column, uncheck that option



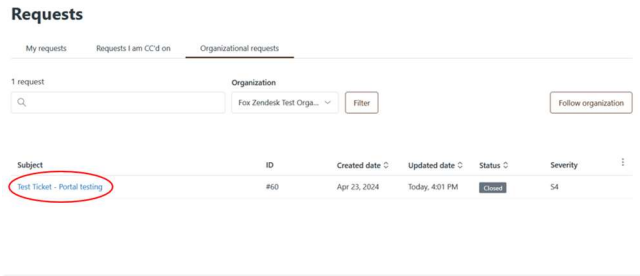
- If you don't see the data you'd like to view, select **See more columns**
- You will be taken to a menu where you can select from the available data to be shown in the request views.
- Select the data you'd like to see and click **Save**
  - o NOTE: The view column settings that you select in any one session will remain active for your account until you make a change later



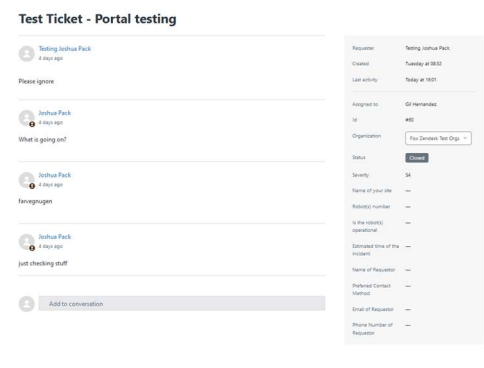
# Seeing comments or adding comments to a ticket

Seeing what is happening with a specific ticket, or to add more information is very easy. To work with a ticket:

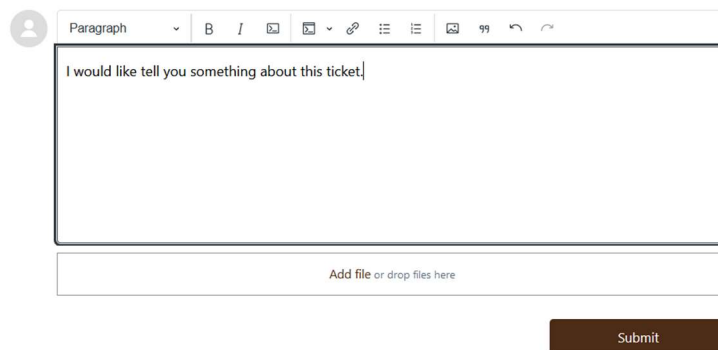
- Open the **Check your Existing Requests** button on the home page
- Select the ticket you'd like to review or add to in the list available in your views



- Clicking on the link will take you to the full comment history of the ticket.



- To add new comments to the ticket click on **Add to the conversation**
  - o You can add comments, files, links or anything that will assist in resolving the reported issue
  - o Add the data you'd like to enter in the ticket and click **SUBMIT**
  - o **NOTE:** If you add a comment on a closed ticket, it will reopen the ticket



# Getting Back to the Home Page

Getting back to the home page once in a status is not intuitive. Please use the **Fox Robotics** hyper link at the bottom of each page to get back to the home page of the Customer Portal.

### Requests

My requests   Requests I am CC'd on   Organizational requests

1 request

Organization

  Fox Zendesk Test Orga...   Filter   Follow organization

Subject	ID	Created date	Updated date	Status	Severity	
<a href="#">Test Ticket - Portal testing</a>	#60	Apr 23, 2024	Today, 4:01 PM	Closed	S4	

[Fox Robotics](#)