

# MAX Web Portal End User Training

April 2017

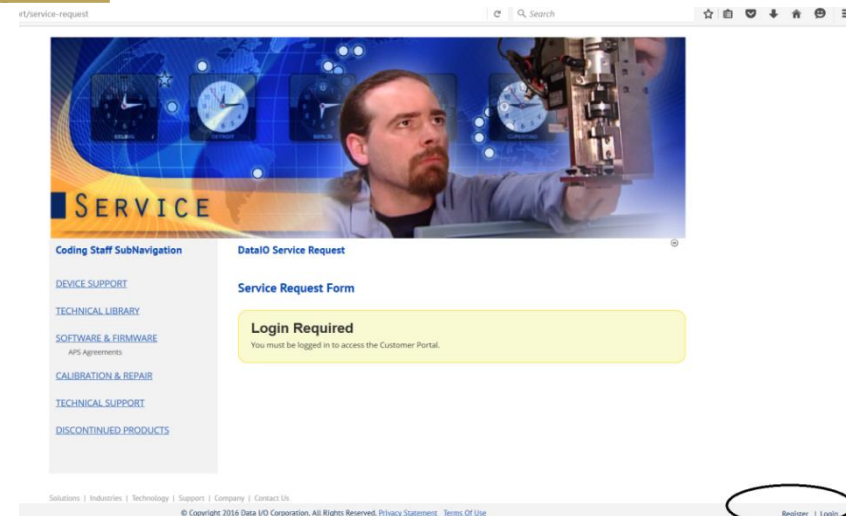
# Overview

**MAX customer web portal is a new system enables Data I/O to deliver an outstanding customer support experience. MAX will enable customers to:**

- Easily track service requests, communications and escalations**
- View all service requests by user log-in**
- Troubleshoot common problems in our FAQ (Frequently Asked Questions)**

# Requirements

- Customers will need to register on our website [www.dataio.com](http://www.dataio.com) before submitting a service request. Registration Link: <http://www.dataio.com/Register?returnurl=%2f>
- All service requests and automated emails from MAX are linked to an individual log in. For customer who have multiple people who manage and monitor service requests for Data I/O systems we recommend creating a generic sign.
  - To Register or Login and fill in all information
  - [www.dataio.com/Support/Service-Request](http://www.dataio.com/Support/Service-Request)



# Recommendations for Creating a Log-in

- **Customer can only view and edit service requests submitted under a specific log-in and user. To ensure communication about service requests throughout your organization we recommend:**

**Option 1:** Create a generic log-in and password for MAX with a distribution list to share in your organization. Ex: [dataiosystems@xxxx.com](mailto:dataiosystems@xxxx.com)

- this method ensures all individuals receive automated emails

**Option 2:** Create a generic log-in and password for MAX and use an individual's specific information. Create an Outlook rule to automatically forward emails from MAX ([dataioinfo@dataio.com](mailto:dataioinfo@dataio.com)) to a specific internal distribution

- User with the log-in credentials can always view, update and escalate service requests directly through the MAX customer portal

# Requirements

Once the customer is registered and logged in, the website will open the service request form. Customers need to fill in all information.

**Please note:** this form does require a valid serial number to submit a request. For help locating your serial number please visit:

<http://www.dataio.com/Support/Technical-Support/Serial-Numbers>

The screenshot shows a web browser window with the URL [www.dataio.com/support/service-request](http://www.dataio.com/support/service-request). The page features the DataIO logo, navigation links for Device search, Technical support, and Contact sales, and language options (English, 中文, Deutsch). A main navigation bar includes Solutions, Industries, Technology, Support, Company, and Contact Us. The central banner image shows a technician working on a device. Below the banner, the 'DataIO Service Request' section is active, displaying a 'Service Request Form'. The form includes a 'Contact Information' section with fields for 'Company Name\*' (containing 'test'), 'Company Address\*' (with a placeholder 'Full Address including City, State, Zip and Country'), and 'Company Website'. A 'Required \*' label is positioned to the right of the form fields. A sidebar on the left contains sub-navigation links for 'Coding Staff SubNavigation', 'DEVICE SUPPORT', 'TECHNICAL LIBRARY', 'SOFTWARE & FIRMWARE', 'CALIBRATION & REPAIR', and 'TECHNICAL SUPPORT'.

# Requirements

If only a general question should be answered by Data I/O please select “Customer Question” and the form will offer you two text fields without the need of a serial number.

**Contact Information** Required \*

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Company Name\*

First Name\*

Last Name\*

Email\* \*

Phone

Cell

**What can we help you with?**

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Select Category\*

Problem Summary\* \*

**Problem Description**

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What is the Defect or Error?

# Getting Started

- Log into MAX customer portal to view and enter service requests:
  - <https://myaccount.dataio.com>
- MAX Customer Portal Welcome Page

The screenshot displays the Data I/O Customer Portal. At the top left is the Data I/O logo. On the right, the user is logged in as 'User: JuergenBr' with a 'Logout' link. A navigation bar contains five numbered items: 1 Home, 2 New Request, 3 FAQs, 4 My Requests, and 5 My Profile. The main content area is titled 'Welcome to the Data I/O Customer Portal' and includes a brief introduction. Below this are four main sections: 'Submit Service Request' (with a plus icon and a green '2'), 'FAQs' (with a question mark icon and a green '3'), 'My Service Requests' (with a list icon and a green '3'), and a 'Search' section with a text input field, a 'GO' button, and radio buttons for 'Requests' and 'Google'. A 'Quick Links' section lists 'Change Password', 'Device Search', and 'Request New Device Support'. The footer indicates the portal is 'Powered by Agiloft'.

# Customer Portal

- **1 Home**

- This tab always brings customers back to the welcome page

- **2 New Request**

- This tab and link opens the service request form to enter a new service request

- **3 FAQs**

- This tab and link brings customers to the FAQ section

- **4 My Request**

- This tab and link brings customers to an overview of all submitted service requests

- **5 My Profile**

- This tab enables customers to change some profile data



# Customer Portal – 2 New Request

- Enter a new service request
- Fields with a \* are required
- Without valid serial number a service request cannot be submitted
- Please enter as much detailed information as possible in the form
- Upload files as large as 700MB maximum
  - Log files
  - Pictures
  - Documents

The screenshot shows a web browser window with a tab titled "now...". The page content is a "Service Request Form". At the top, there is a heading "Service Request Form" and a paragraph of instructions: "Please answer the following questions as completely as you can. We've discovered that the majority of problems require this information to effectively solve your problem. Sometimes problems require additional information. We will contact you if we require additional information." Below this is a section titled "Contact Information" with a "Required \*" label. This section contains six input fields: "Company Name\*" (filled with "June Bugs"), "First Name\*" (filled with "Hermonie"), "Last Name\*" (filled with "Weasly"), "Email\*" (filled with "HermonieGrangerRedmond1@yahoo.com"), "Phone", and "Cell". Below the contact information is a section titled "Product Information" with three input fields: "SerialNumber\*", "Software Version\*", and "Firmware Version\*". At the bottom is a section titled "Problem Description" with a "Problem Summary\*" input field.

# Customer Portal – 2 New Request

- **Priority levels of your service request**
  - The priority of your service request is set automatically.
- **If your system serial number has a valid service contract or is under warranty AND you check “Yes” for the system down question:**
  - Priority is set to “System Down”
- **If the system is under warranty and you do not check “Yes” for the system down question:**
  - Priority is set to “Critical”
- **All other service contracts:**
  - Priority is set to “High”

# Customer Portal – 3 FAQs

- Frequently Asked Questions is a new section that will be built up over time.
- All answers shown here are posted after going through an internal approval process within Data I/O.
- Check back for updates

The screenshot shows the Data I/O Customer Portal interface. At the top left is the Data I/O logo. At the top right, it says "User: JuergenBr | Logout". Below this is a navigation bar with buttons for "Home", "New Request", "FAQs" (which is highlighted), "My Requests", and "My Profile". Below the navigation bar, the word "FAQ" is displayed. The main content area is titled "Find Answers" and contains a search form. The search form has two tabs: "Search" (selected) and "Advanced Search". The search form includes a "Select topic:" section with a dropdown menu for "Knowledgebase Topics" set to "All". Below this is a "Search for keywords:" input field, a "Sort by:" dropdown menu set to "Newest", and a "Combine words as:" dropdown menu set to "Natural Language". A "Go" button is located to the right of the search form. Below the search form, it says "Status: 0 result(s) found". At the bottom, there is a table header with "Service Request No" and "Summary".

# Customer Portal – 4 My Requests

- Customers can view all service requests submitted under the log-in
- Service requests can accessed, edited, escalated and reopened



User: JuergenBr | Logout

Home

New Request

FAQs

My Requests

My Profile

## My Requests


Saved Search: Show all records

Text:

GO

### Service Requests

Status: 1 record(s) found, 1 pages [Click for details...](#)

<input type="checkbox"/>	Edit	Service Request No	Serial Numbers	Products	Summary	Status	Date Created	Submitter Name
<input type="checkbox"/>		<a href="#">549</a>	21030485	RR-PROLINE-FC3-A-NA	<a href="#">Test Request</a>	Open	May 02 2016 05:40	Juergen Brubler

# Customer Portal – 4 My Requests

- **To re-open a Service Request:**

- Go to “My Service Requests” and edit the Service Request you want to re-open
- Enter any new or additional information into the “Additional Information” text field
- At the bottom set the check box “I would like to reopen my Service Request” to “Yes”
- Save the Service Request

**My Requests** Saved Search:

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**Service Request Information**

Category:  Work Before:

Work Around:  Frequency:

Software Version:  Firmware Version:

Description: 1

Additional Information:   
When did you first notice the problem?  
1

What Changes, if any, have you made?  
1

When in the process does the problem occur?  
1

Can you reproduce the problem?  
Yes

Is the problem getting worse or is it staying about the same?  
Yes, getting worse

test

New / additional information

Attached Files: [Attach/Manage](#)

I would like to reopen my Service Request.  Yes  No

# Customer Portal – 5 My Profile

- The “My Profile” Tab enables customers to update their profile information and change their password
- Customers cannot change their Login name

**Data I/O** User: JuergenBr | Logout

Home New Request FAQs My Requests **My Profile**

## My profile

**End User**

Save Cancel **Contact Information** <>

**Contact Information**

First Name: Juergen Last Name: Brubler

Title: Company: [Data I/O GmbH - Wangen](#)

Email: j.brubler@gmail.com Company Phone: [+49-7522-771961](#)

Skype Login:

Direct Phone: Ext. Cell Phone:

**User Information**

\*Login: JuergenBr

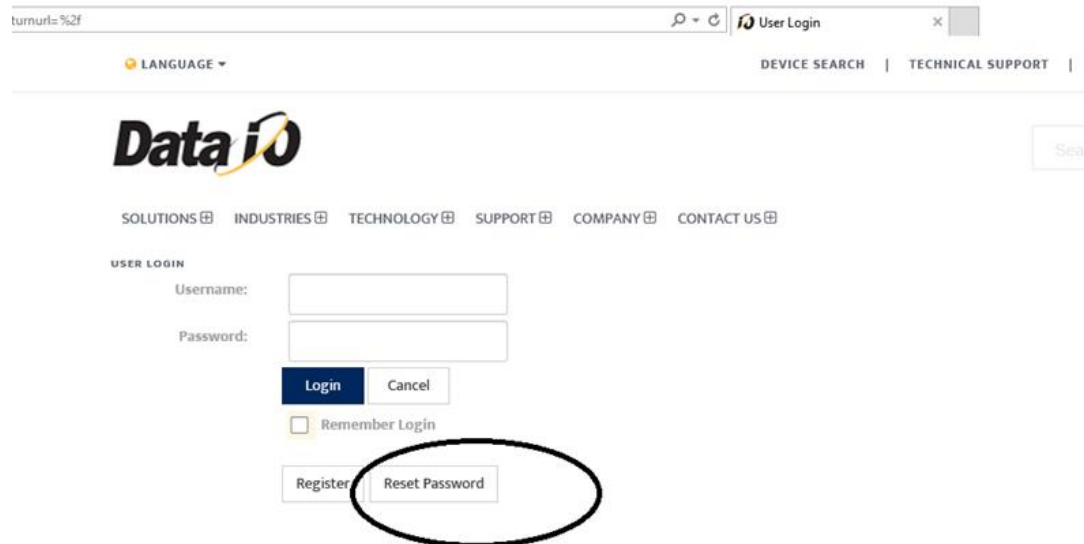
Opt Out:  Do not email me

User time zone: (GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna - W. Europe Standard Time

Save Cancel <>

# How to reset my password?

- MAX passwords are tied to the Website Login
- If you have forgotten your password then click on the 'Reset Password' button from the Login screen. If you are not logged in to the Website and click MAX it you will be taken to the website login screen with password reset:



The image shows a screenshot of the Data I/O website's user login page. The browser's address bar shows 'turnurl=%2f' and the page title is 'User Login'. The website header includes a 'LANGUAGE' dropdown, 'DEVICE SEARCH', and 'TECHNICAL SUPPORT' links. The Data I/O logo is prominently displayed. Below the logo are navigation links for 'SOLUTIONS', 'INDUSTRIES', 'TECHNOLOGY', 'SUPPORT', 'COMPANY', and 'CONTACT US'. The 'USER LOGIN' section contains a 'Username' field, a 'Password' field, a 'Login' button, a 'Cancel' button, a 'Remember Login' checkbox, a 'Register' button, and a 'Reset Password' button. The 'Reset Password' button is circled in black.

# Additional Questions

- Contact your local Data I/O Office

## Attention:

- Mails sent to [support@dataio.com](mailto:support@dataio.com) will not be answered anymore!