



protel Service Desk

Short user instruction

How to get the most out of the protel Customer Support Portal

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protel Service Desk - the better service experience

What is it all about?	<p>The new protel Customer Service Desk was introduced in November 2018 for all customers working with protel SPE/MPE or protel Air.</p> <p>The user-friendly Help Center allows you to quickly and easily submit your requests to the protel Support Team: Simply create a support ticket online.</p> <p>Whether it's a user question, an incident report, a task plan, or a request to customize your protel configuration - the protel Service Desk provides a single platform for everything from first contact to solution.</p>		
Quick and easy solution	<ul style="list-style-type: none"> ▼ Once created, you can track the progress of your tickets and view their current status at any time. ▼ In addition, each time your tickets are processed or updated, you will receive an e-mail notification so that you are always up to date and do not miss any important information. ▼ You can also use the comment function in the ticket to exchange information directly with our support staff. 		
What is this document about?	<p>This document describes step-by-step how to register with the Service Desk and use it afterwards. You'll learn:</p> <ul style="list-style-type: none"> ▼ how to open the Service Desk in your Internet browser and log in ▼ about the types of requests you can make ▼ how to track and manage your requests 		
Access	<p>How to access your protel Service Portal:</p> <p>Entry page https://jira-live.protel.net/servicedesk/customer/portals</p> <p>Start screen English https://jira-live.protel.net/servicedesk/customer/portal/2</p> <p>Start screen German https://jira-live.protel.net/servicedesk/customer/portal/4</p>		
Do you have any questions?	<p>If you have any questions that are not answered in this manual, please send us an E-mail or give us a call.</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 60%;"> protel hotelsoftware GmbH Europaplatz 8 44269 Dortmund Germany </td> <td style="width: 40%; text-align: right; vertical-align: top;"> T: +49 231 915 93 555 F: +49 231 915 93 999 support@protel.net www.protel.net </td> </tr> </table>	protel hotelsoftware GmbH Europaplatz 8 44269 Dortmund Germany	T: +49 231 915 93 555 F: +49 231 915 93 999 support@protel.net www.protel.net
protel hotelsoftware GmbH Europaplatz 8 44269 Dortmund Germany	T: +49 231 915 93 555 F: +49 231 915 93 999 support@protel.net www.protel.net		

Register and log in

To register with the Customer Service Desk, please send a short e-mail with "**Registration desired**" as subject line to support@protel.net or give us a call: (+49) 0231 915 93 555.

We will create an account using your name and email address, and you will immediately receive a confirmation email.

The automatically created email confirming your new account can be found in your inbox with the subject "**[JIRA] account created**".



The e-mail contains the following information:

- ▼ Your name,
- ▼ Your email address
This is the address that the protel Service Desk will use for future communication with you.
- ▼ Your username
This number is your unique user ID. It cannot be changed. Each employee of the hotel can be identified and assigned using this number.

Please remember this number! You will need it for registration, or if you want to reset your password for the protel Service Desk later.

The e-mail also contains a link to set up your personal password.

- ▼ Please note: The password link is only valid for 24 hours!

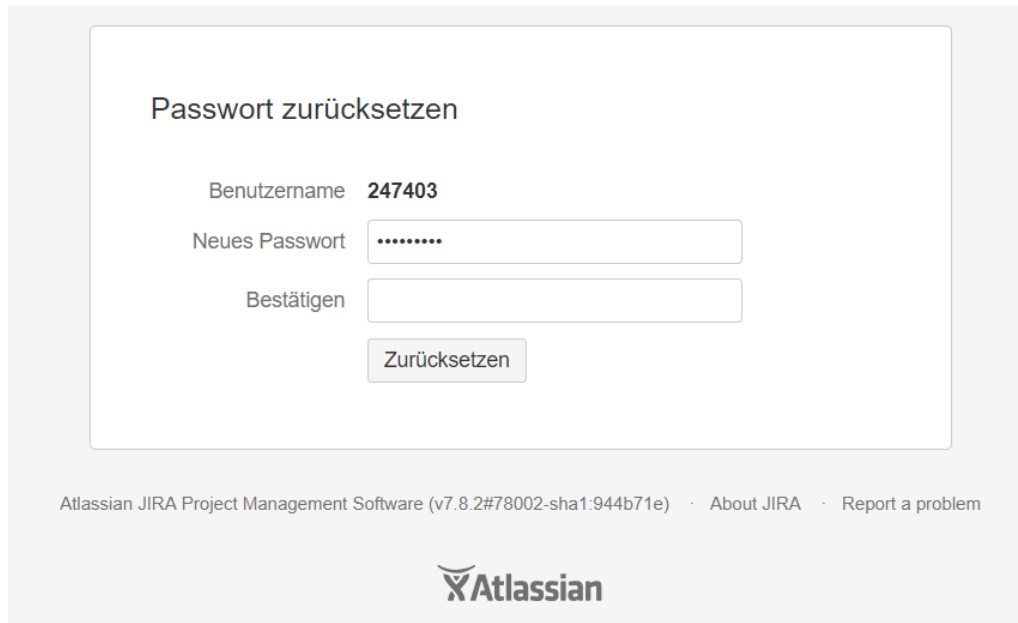
But don't worry: If the link expires before logging on for the first time, you can have a new password link sent to you at any time via the link in the last line of the e-mail.

Set password

To use the protel Service Desk, you need a personal password. You do this once.

Simply click on the **Set up my password** button in the e-mail.

You will now be taken to a page where you can enter your password:




Passwort zurücksetzen

Benutzername **247403**

Neues Passwort

Bestätigen

Atlassian JIRA Project Management Software (v7.8.2#78002-sha1:944b71e) · About JIRA · Report a problem



Your username is already set in the password dialog box.

Now complete your desired password and repeat the entry.

Finally, click [**Reset**].

▼ *Hint: If you don't see this dialog, it's because your link has expired. If this is the case, please read on in the next section.*

On the confirmation page ...



Passwort zurücksetzen

Ihr Passwort wurde zurückgesetzt. Sie können jetzt [JIRA verwenden.](#)

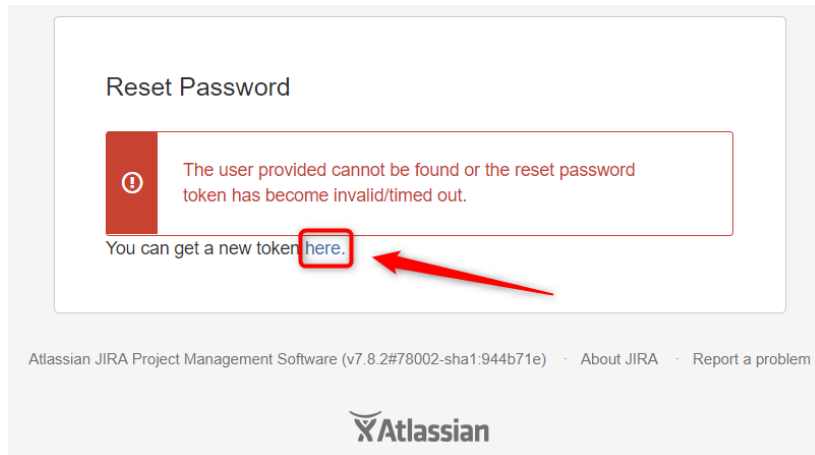
Atlassian JIRA Project Management Software (v7.8.2#78002-sha1:944b71e) · About JIRA · Report a problem



... click on the **Use JIRA** link to log in to the protel Service Desk for the first time.

Has your password link expired? This is how you request a new one

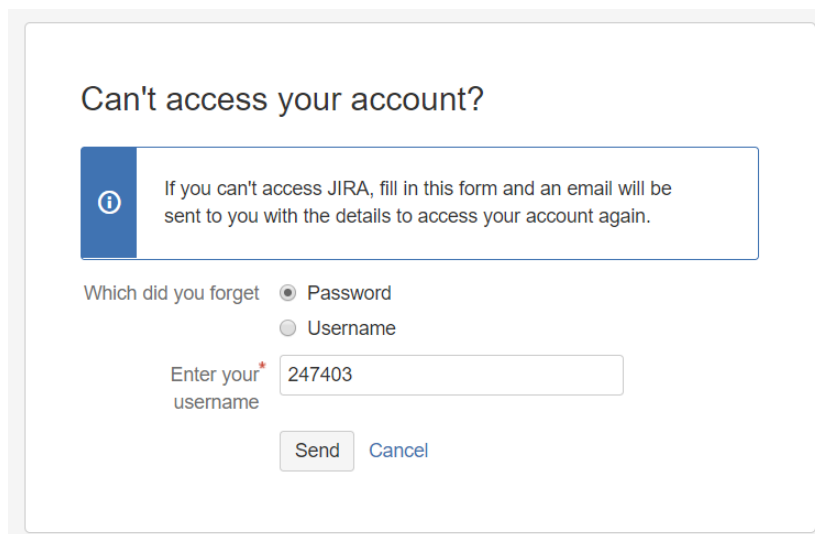
The link to set up the password is only valid for 24 hours! If the link in your email has expired, you will be redirected to a page where you can request a new password link:



Click on the link as shown in the figure.

▼ *Hint: Alternatively, you can have a new password link sent to you at any time via the link located in the last line of the email confirming account creation.*

In the following dialog box, select the **Password** option...



.... and enter your user name in the field below.

Your username is the number in the email

Click on **Send**.

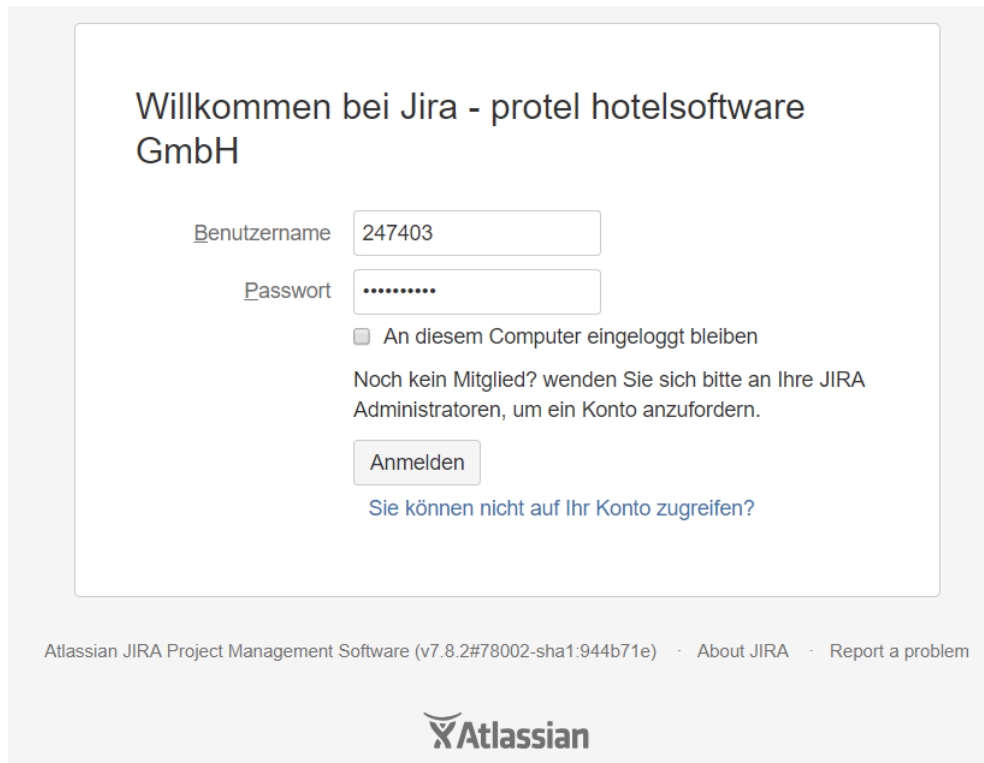
You then receive an e-mail with a new password link.

Then proceed as described in the section about **Setting up the password**.

After successfully creating your password, you will automatically be taken to the protel Service Desk login page.

Login - the login dialog box

Once you have successfully created your password, you will be automatically redirected to the login page:



Willkommen bei Jira - protel hotelsoftware GmbH

Benutzername


Passwort

An diesem Computer eingeloggt bleiben

Noch kein Mitglied? wenden Sie sich bitte an Ihre JIRA Administratoren, um ein Konto anzufordern.

[Sie können nicht auf Ihr Konto zugreifen?](#)

Atlassian JIRA Project Management Software (v7.8.2#78002-sha1:944b71e) · About JIRA · Report a problem



Enter your **user name** and **password** in the login dialog box.


Your username is the number in the email, see the **Account Confirmation and Password Creation** section.

Clicking on **Log in ...**

... takes you to the protel Service Desk homepage:



Welcome to the protel Support Service Desk



Populär

- [Customer Service Desk](#)
- [New Feature Management ...](#)
- [User Management Portal](#)
- [IT Service Management & ...](#)
- [Partner Service Desk](#)

▼ In the following sections, we will show you how to use the Service Desk to submit a support request and how to keep track of the progress of your requests.

Set start page and select language

The protel Service Desk is available in two languages, German and English.



Contents and functions are identical in both language variants, i.e. you can find all your tickets in both views.

You decide which portal you want to work with. This is how you do it:

After the (first) login, you will first be taken to an overview page:

Welcome to the protel Support Service Desk

🔍

Popular	Recent
<ul style="list-style-type: none"> <li style="border: 2px solid red; padding: 2px; margin-bottom: 5px;">Customer Service Desk <li style="margin-bottom: 5px;">IT Service Managem... <li style="margin-bottom: 5px;">New Feature Manage... <li style="margin-bottom: 5px;">Partner Service Desk <li style="margin-bottom: 5px;">User Management P... 	<ul style="list-style-type: none"> <li style="margin-bottom: 10px;">  Question · Customer Service Desk I have a question about the system  Incident · Customer Service Desk I am experiencing an error / crash or other unexpected event

Click on the desired portal in the **Popular** list

- ▼ **Customer Service Desk** for the English Portal
- ▼ **Kunden Service Desk** for the German Portal

Set up a bookmark

If you want to skip this selection when logging in, bookmark the portal you want to use.

Would you like to register directly at the English portal? Then call up this URL ...

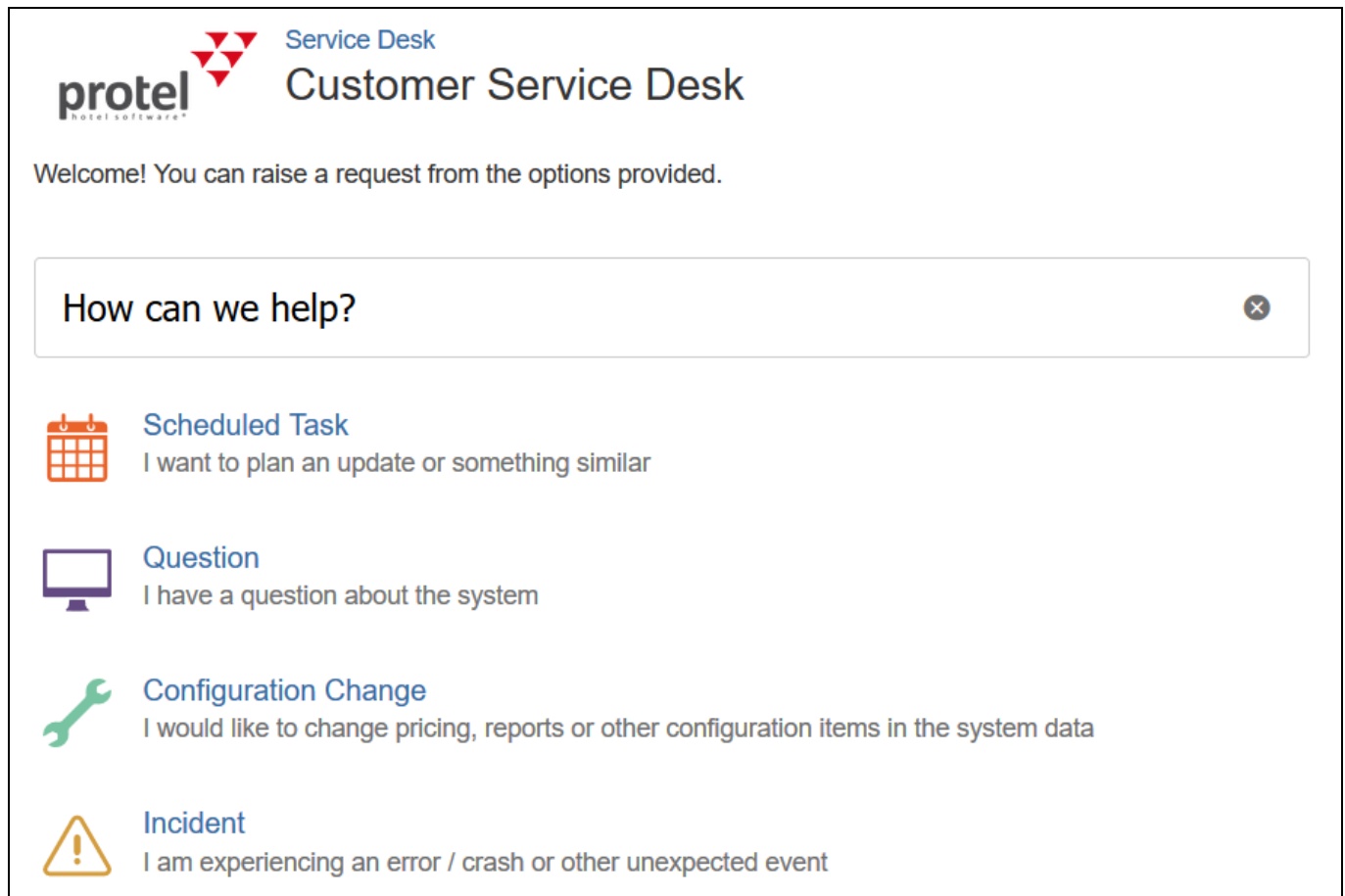
<https://jira-live.protel.net/servicedesk/customer/portal/2>

...and then set a bookmark in your browser.

For the next login, all you have to do is click on the bookmark, and after logging in, this portal will be opened and loaded immediately.

Submit a support request

The start screen of the selected portal is your direct access to the protel Support Team:



Here you can find a suitable option for contacting the protel support team in every situation.

Four types of requests: task planning, question, configuration change, or incident



Depending on what is at stake, you can select the appropriate transaction type by clicking on it

- ▼ schedule a task,
- ▼ ask a question,
- ▼ request a change to the configuration, or
- ▼ report an incident

In the next sections we will introduce you to the input forms for the four transaction types and explain how you can design a support request in a way that our support team can help you as quickly and smoothly as possible.

The request form

No matter if question, incident, task planning or configuration change - the inquiry form is essentially structured the same for all four types of processes:

	Form section	Comments
	 Service Desk / Customer Service Desk Configuration Change	Request type
mandatory	Summary <input type="text"/>	Text field for the most important facts. This is the title of the ticket under which you will find it later. If possible, name the product, sub-product and functional area in the title (field "Summary").
mandatory	Description <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>	Text field for more detailed display. Describe your request as precisely as possible here. Always name the following information: <ul style="list-style-type: none"> ▼ The product it's about ▼ Subproduct / Theme / Module / Category... ▼ If applicable Name of the program menu, name of the window, etc. The more detailed the description, the easier it will be for us to process your request.
mandatory	Customer Select <input type="text" value="Search for an object"/>	The selection list shows all hotels linked to your account. Select the property of interest in this request.
mandatory	Contact Select <input type="text" value="Search for an object"/>	The selection list contains all contact points stored in our system for the previously selected hotel. Select the contact who should take care of this request.
optional	License Select <input type="text" value="Search for an object"/>	The selection list shows all products that are licensed for you. Select the product of interest in this request.
optional	Severity (optional) <input type="text" value="Keine"/>	Define the severity of your request. This makes it easier for our support team to prioritize processing.
optional	Attachment (optional) <div style="border: 1px dashed #ccc; padding: 10px; text-align: center;">  Drag and drop files, paste screenshots, or browse </div>	You can attach any files for illustration purposes. <i>(Not for all request types)</i> See the FAQ section to find out how to attach files.
	<input type="button" value="Create"/> <input type="button" value="Cancel"/>	Save your entries and create your ticket. The generated ticket opens automatically in a new window.

How to find, track, edit, share, and more about your ticket is described in the **Manage Requests** section

Ask a question

You have a general question about the application, for example, "How can I merge duplicate guest files?"

Click on the type [Question](#) and enter all the necessary information.

If possible, include the product, sub-product and functional area to which your question refers in the title (field "Summary").

Example:

protel Air | Guest Profile | How can I merge duplicate guest files?

Report an incident

If you encounter a problem in the application and cannot find a solution in our documentation, you can report an **incident** to us and request help to solve the problem.

Example of an incident: You cannot perform a particular function, an error message appears instead.

Click on the request type [Incident](#) and enter all the the type necessary information.

Example:

protel SPE | Office > Reporting | Cash Register Report | Not printing

Schedule a task

Would you like to request an appointment with us, for example to install an update or a new interface? You can plan requests like these as **tasks**.

Click on the request type [scheduled task](#) and enter all relevant information in the following window (see previous sections).

Example:

protel SPE | Appointment request for server move

Request a configuration change

Need help customizing a text template or want to adjust your rate structure?

Click on the request type [Configuration change](#) and register the adjustment of the system data and your software's configuration.

Example:

protel Air | VAT adjustment

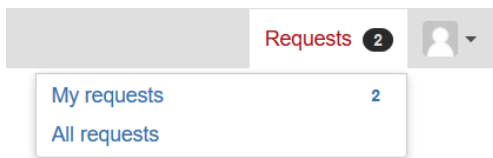
The next section explains how to find, track, edit and share your tickets.

Manage your requests

By clicking on **requests** in the global menu at the top right, you can access all your requests at any time, regardless of which page of the portal you are currently on:



If open requests are assigned to your user, a number appears to the right of the menu, for example a **2** for two open requests:






- ▼ If you click on **My Requests**, the default list opens with all open tickets, which *YOU* created.
- ▼ If you click on **All Tasks**, the default list opens with all open tickets that were created *BY OTHER USERS*.

In both cases, you can change the selection afterwards if required.

All requests at a glance

On the Enquiries page, you can access any requests that you have created or that are associated with your account:

Type	Reference	Summary	Service desk	Status	Requester
	SUPE-182	protel Air Gästekartei Wie kann ich doppelte Gästekarteien zusammenführen?	Customer Service Desk	OPEN	Detroy, Susanne
	SUPE-183	protel SPE Büro > Berichtswesen Kassenbericht Wird nicht gedruckt	Customer Service Desk	OPEN	Detroy, Susanne
	SUPE-278	protel SPE Terminanfrage für Serverumzug	Customer Service Desk	IN PROGRESS	Detroy, Susanne



Find requests by using filters

To track the progress of your requests, you can filter the list, as needed. Select / sort by

- ▼ Status
- ▼ Created by
- ▼ Request type

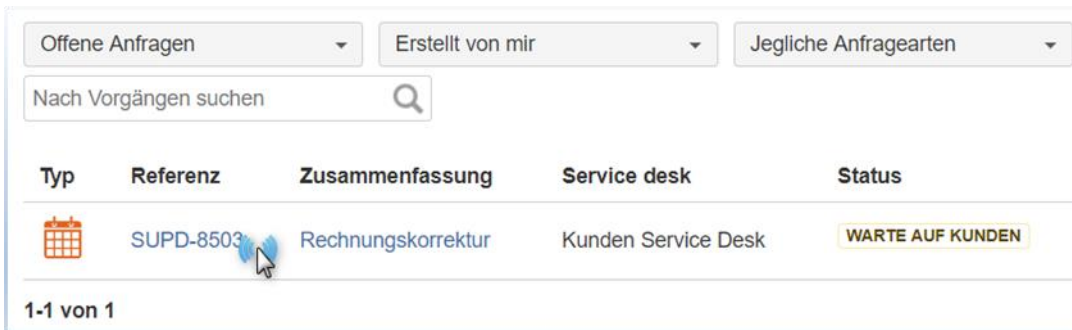
All filters can be freely combined.


You can filter the view according to the following criteria:

<div style="border: 1px solid #ccc; padding: 5px;"> <p>Any status ▾</p> <p>Any status</p> <p>Open requests</p> <p>Closed requests</p> </div>	<p>Filter by request status</p> <ul style="list-style-type: none"> ▪ Any status: Shows <i>ALL</i> enquiries ▪ Open inquiries: Shows only requests with the status "open". "Open" means that the request has not yet been processed. ▪ Closed requests: Shows all requests that have been successfully processed and closed.
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Created by anyone ▾</p> <p>Created by anyone</p> <p>Created by me</p> <p>Where I am a participant</p> </div>	<p>Filter by creator</p> <ul style="list-style-type: none"> ▪ Created by someone else: Shows only requests created by other users, i.e. "foreign" tickets. ▪ Created by me: Shows only requests created with the logged in user, i.e. the "own" tickets. ▪ Where I'm a participant: Shows tickets that have been shared with you.
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Any request type ▾</p> <p>Any request type</p> <p>CUSTOMER SERVICE DESK</p> <p> Incident</p> <p> Question</p> </div>	<p>Filter by type of request</p> <ul style="list-style-type: none"> ▪ By selecting a request type, only tickets with this request type will be shown. ▪ Any kind of request: Shows all request types (questions, scheduled tasks, incidents, and configuration changes).

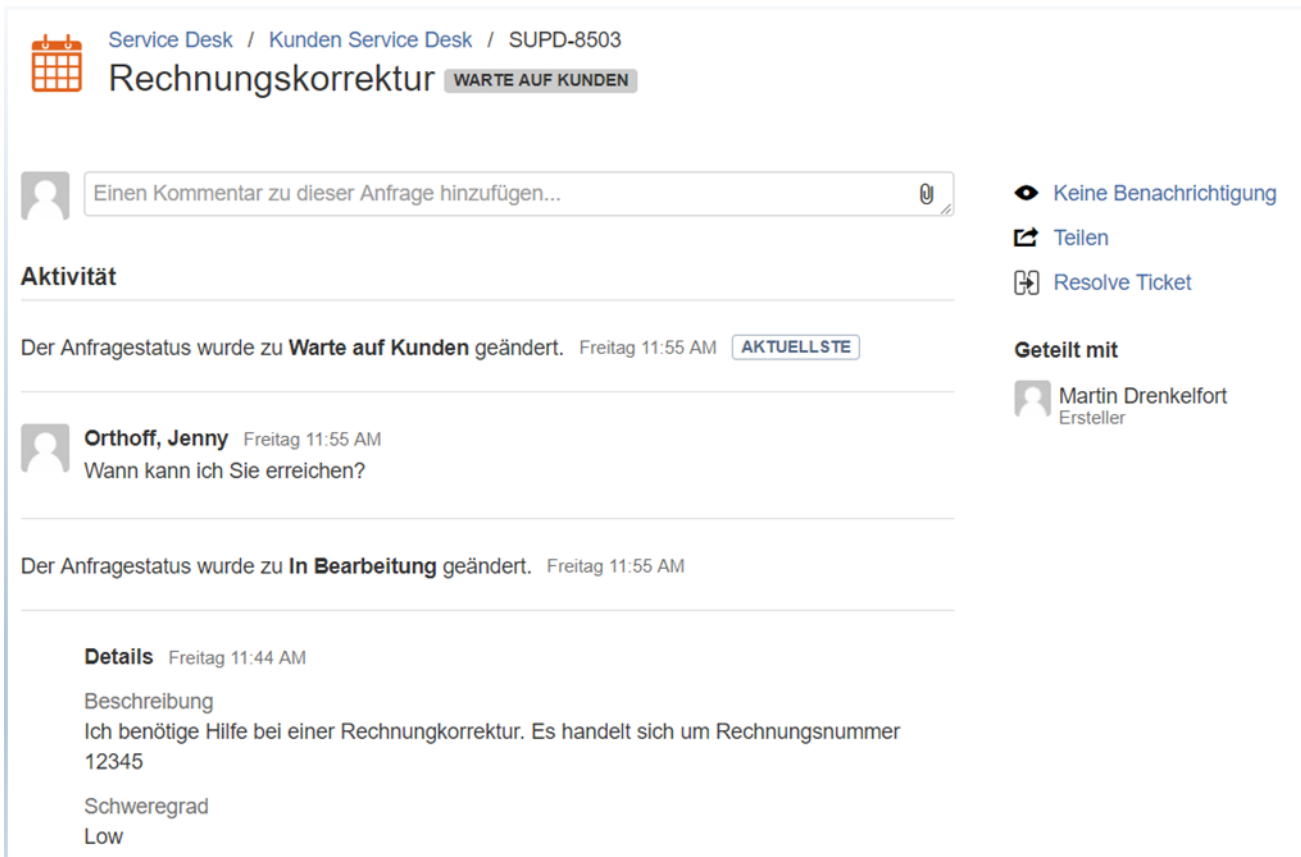
View the details of a request

By clicking on a request in the overview...



The screenshot shows a table with the following columns: Typ, Referenz, Zusammenfassung, Service desk, and Status. A single row is visible with the following data: Typ: , Referenz: SUPD-8503, Zusammenfassung: Rechnungskorrektur, Service desk: Kunden Service Desk, Status: WARTEN AUF KUNDEN. Above the table are filters for 'Offene Anfragen', 'Erstellt von mir', and 'Jegliche Anfragearten', along with a search bar 'Nach Vorgängen suchen'.

... the detailed view of the ticket opens:



The screenshot shows the detailed view of a ticket. At the top, there is a breadcrumb trail: Service Desk / Kunden Service Desk / SUPD-8503. The ticket title is 'Rechnungskorrektur' with a status badge 'WARTEN AUF KUNDEN'. Below the title is a comment input field with the placeholder text 'Einen Kommentar zu dieser Anfrage hinzufügen...'. To the right of the input field are three icons: 'Keine Benachrichtigung', 'Teilen', and 'Resolve Ticket'. Under the heading 'Aktivität', there are three activity items: 1) 'Der Anfragestatus wurde zu **Warte auf Kunden** geändert. Freitag 11:55 AM' with an 'AKTUELLSTE' badge. 2) A comment by 'Orthoff, Jenny' from 'Freitag 11:55 AM' with the text 'Wann kann ich Sie erreichen?'. 3) 'Der Anfragestatus wurde zu **In Bearbeitung** geändert. Freitag 11:55 AM'. At the bottom, under the heading 'Details' (Freitag 11:44 AM), there is a 'Beschreibung' section with the text 'Ich benötige Hilfe bei einer Rechnungskorrektur. Es handelt sich um Rechnungsnummer 12345' and a 'Schweregrad' section with the value 'Low'.

In the detailed view you will find all relevant information about the ticket. The most important information is explained in the following sections.

Find the ticket number

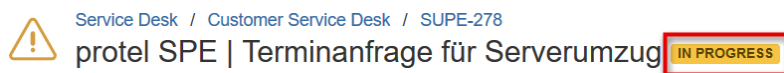
The ticket number serves as reference. If a support representative were to ask you, you can find the number in the title bar of the ticket:



The ticket number is also used in all correspondence relating to the ticket (e-mails).

Check the processing status

The ticket status is also displayed in the title bar:



The status tells you about the processing status of this request.

Add a comment

Add a comment if you have a statement or question about a ticket. To do this, click in the empty text field and enter the desired text.



You can also upload an attachment by clicking on the paper clip symbol located on the right in the text field.

Trace activities

In the **Activity** area you can see what has happened so far - here all actions are recorded in a clean history.

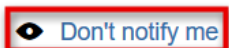
Activity

Your request status changed to In Progress. Friday 2:14 PM **LATEST**

Subscribe and unsubscribe notifications

By default, you will receive an email notification for each activity related to a ticket.

If you do not want any more notifications, click on **No Notifications**.

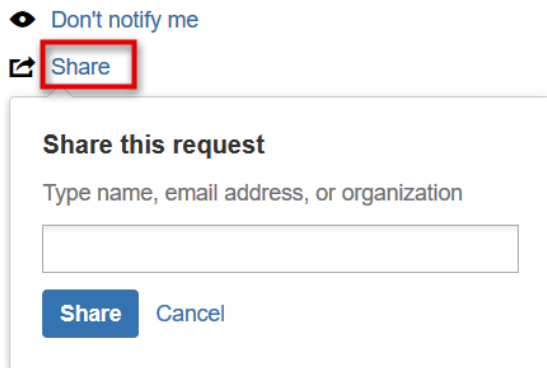


 Share

You can restore the original status by clicking on **Receive notifications**.

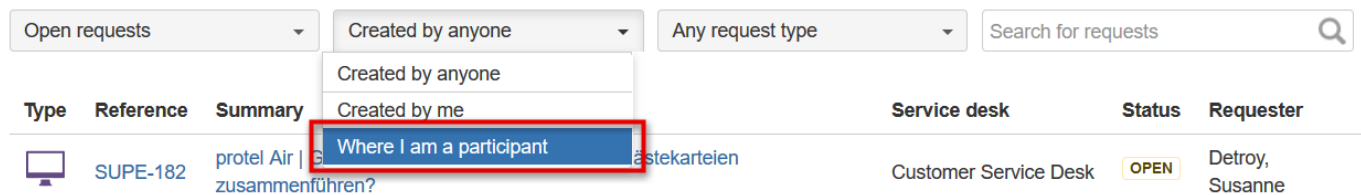
Share tickets with other users

Click **Share** if you want to share the ticket with other Service Desk users.



To share a ticket, enter the full email address of the other user. You can also enter multiple users or e-mail addresses in a row if you want to share the ticket with multiple users. The prerequisite is that the employee also has a **protel customer service desk** login.

The employee with whom the ticket was shared sees the ticket in the "Where I am a participant" filter in the request overview:



Close a ticket

Is your enquiry no longer necessary because, e.g., you were able to solve the problem yourself?

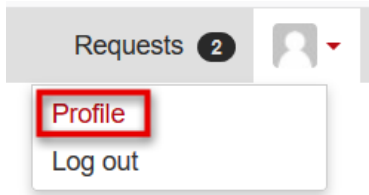
In this case we ask you to close the ticket by clicking on **Resolve Ticket**. The ticket then receives the "Closed" status.



You can still access the ticket by clicking on **Requests / My Requests** at the top right and selecting the **Closed Requests** filter.

Edit your user profile

Click on the user profile icon at the top right of the window and then on **Profile** to open your user profile.



You can **edit** your profile and, for example, upload your own profile picture or change the Service Desk **language**.

Search the Knowledge Base

With the introduction of the protel Help Desk, we are starting another great project that will make it easier for you, dear customer, to use our software products: The protel knowledge database will give you direct access to many years of product knowledge accumulated by our supporters.

This database is currently under construction.

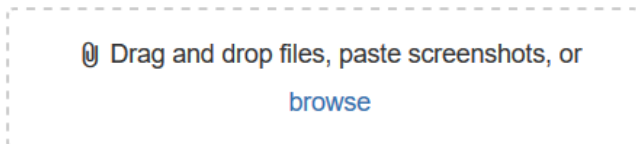
You can use the search function to search for different articles in our knowledge database.

FAQ

How do I attach files to a ticket?

In the attachment section of the request form ...

Attachment (optional)



... there are three ways to attach files:

- 1) **Drag & Drop**
 Drag and drop the file you want to insert into the window area provided.
 To do this, open the folder of the file, hold down the left mouse button, drag and drop the file at its destination (Attachment pane) by releasing the mouse button.
- 2) **Browse folders**
 Click on **Browse**. Open the folder/location of the file, select the file, and then click **Open**.
- 3) **Paste from clipboard**
 Copy the desired file to the clipboard.
 Switch back to the Service Desk window and position the mouse pointer in the area for inserting attachments.
 Then press the key combination Ctrl + V.

How do I insert a screenshot quickly and easily?

Pictures say more than a thousand words - a screenshot can considerably illustrate a described problem or fact.

This is the quickest way to proceed:

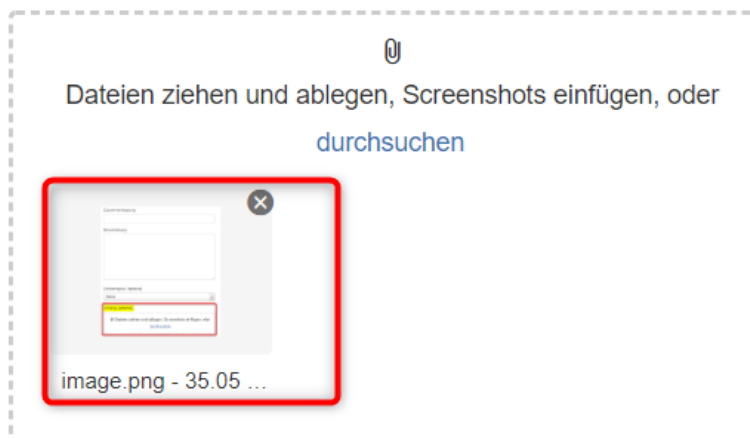
Take a screenshot using the screenshot software of your choice.

Most common programs allow you to copy the screenshot to the clipboard. Once you have done this, go back to the Service Desk window and position the mouse pointer in the area to insert attachments.

Then use the **key combination Ctrl + V**.

The screenshot is now pasted from the clipboard into the opened ticket:

Anhang (optional)



Why don't I get a registration email? What should I do?

There may be several reasons for this:

- ▼ The email address entered during registration does not exist.
- ▼ It's possible that you didn't call up the right email account belonging to the registration.
- ▼ The confirmation e-mail has landed in the SPAM folder of your mailbox.
- ▼ You didn't wait long enough for the e-mail. The delivery of the e-mail can take up to 10-15 minutes.

If the above options do not apply, please contact us.

About protel Documents

Symbols used in this documentation

- ▼ Hints, tips, more details, good to know
- ▼ Please note: Important!

Please check: Is this the latest version? Should you realize that certain processes described in this document seem incorrect, it is possible that you may not be using the latest version of this document.

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