User Guide

Self-Service Client Portal

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Portal Overview

This document will demonstrate how to use the Salesforce Client Portal. The Salesforce Client Portal allows LIM customers to view, and update the inquiries they have reported to LIM. The Portal also enables LIM customers to report new issues to LIM.

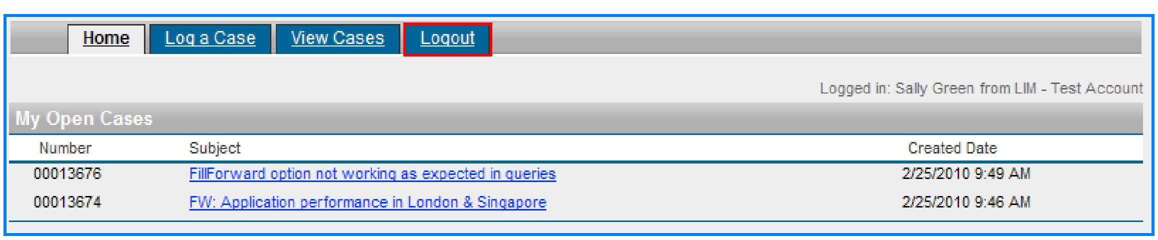
Logging In to the Portal

To log in to the Self-Service portal:

- Open the Self-Service portal in your browser. The URL is: www.lim.com/support
- Enter your username and password as provided via email.

  If you do not have your password available, click **Forgot your password?**. Enter your user name and click **Submit**. You will receive an email with a temporary password. When you log in to the Self-Service portal, you will be asked to reset your password.
- Click **Login**.

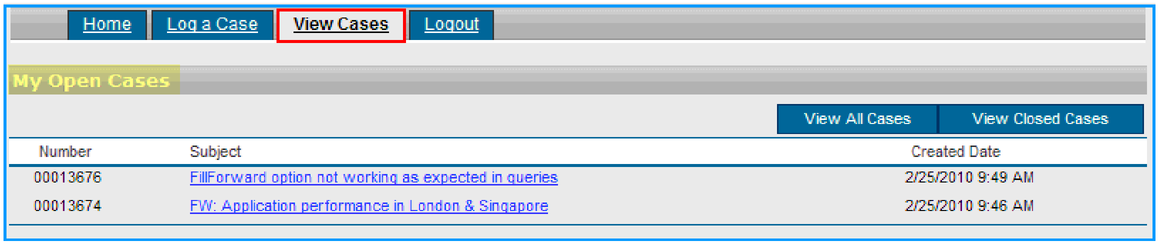
Once logged in, you will be in the **Home** tab. To log out of the Self-Service portal, simply click the **Logout** tab.



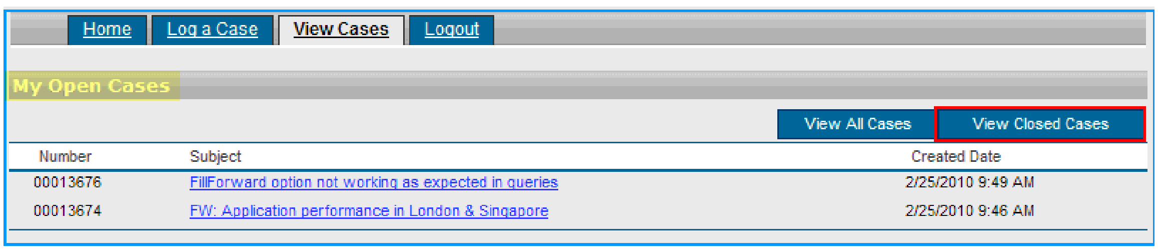
Viewing Your Cases

In the Self-Service portal, the inquiries that you submit to the Customer Support team are called "cases." To view your open and resolved cases:

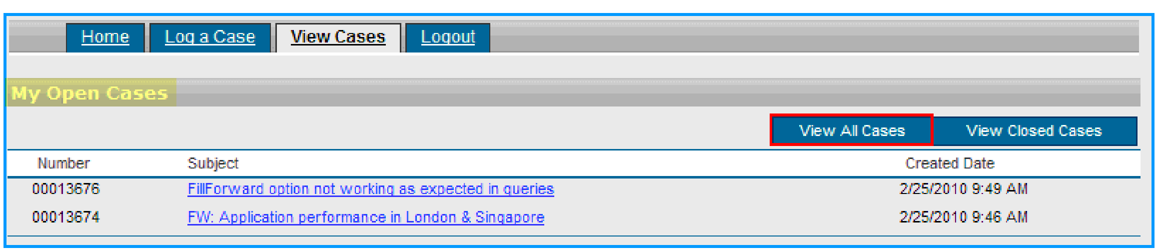
- Click the **View Cases** tab. The open cases that you have submitted are displayed. The title bar that is highlighted yellow will indicate what case view you are in.



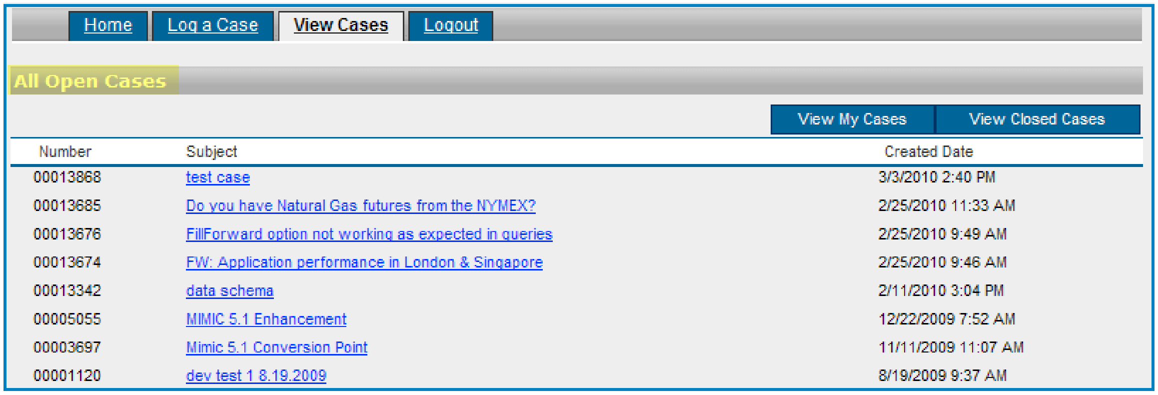
- Optionally, click the **View Closed Cases** button to view a list of your resolved cases.



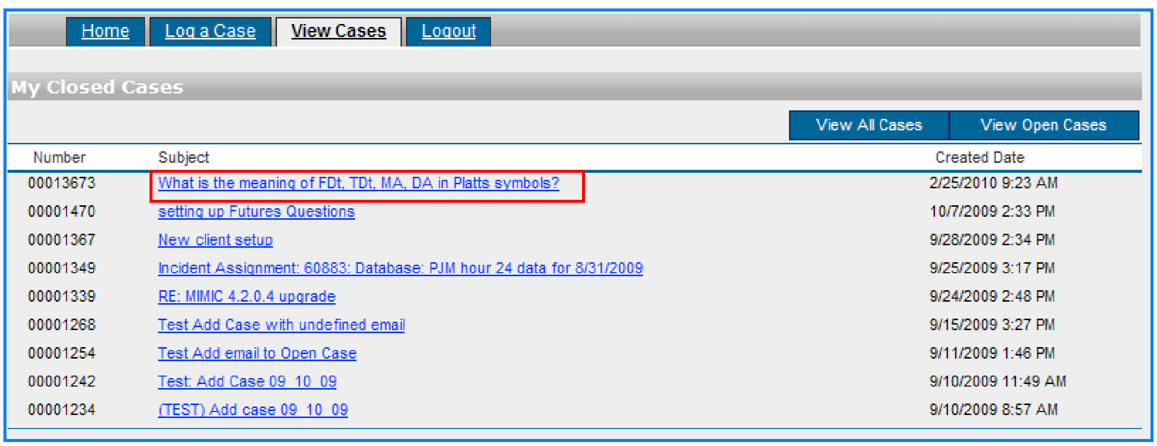
- If you are a Self-Service portal "super user," you will be able to view all of the open and resolved cases submitted by everyone in your company by clicking the **View All Cases** button.



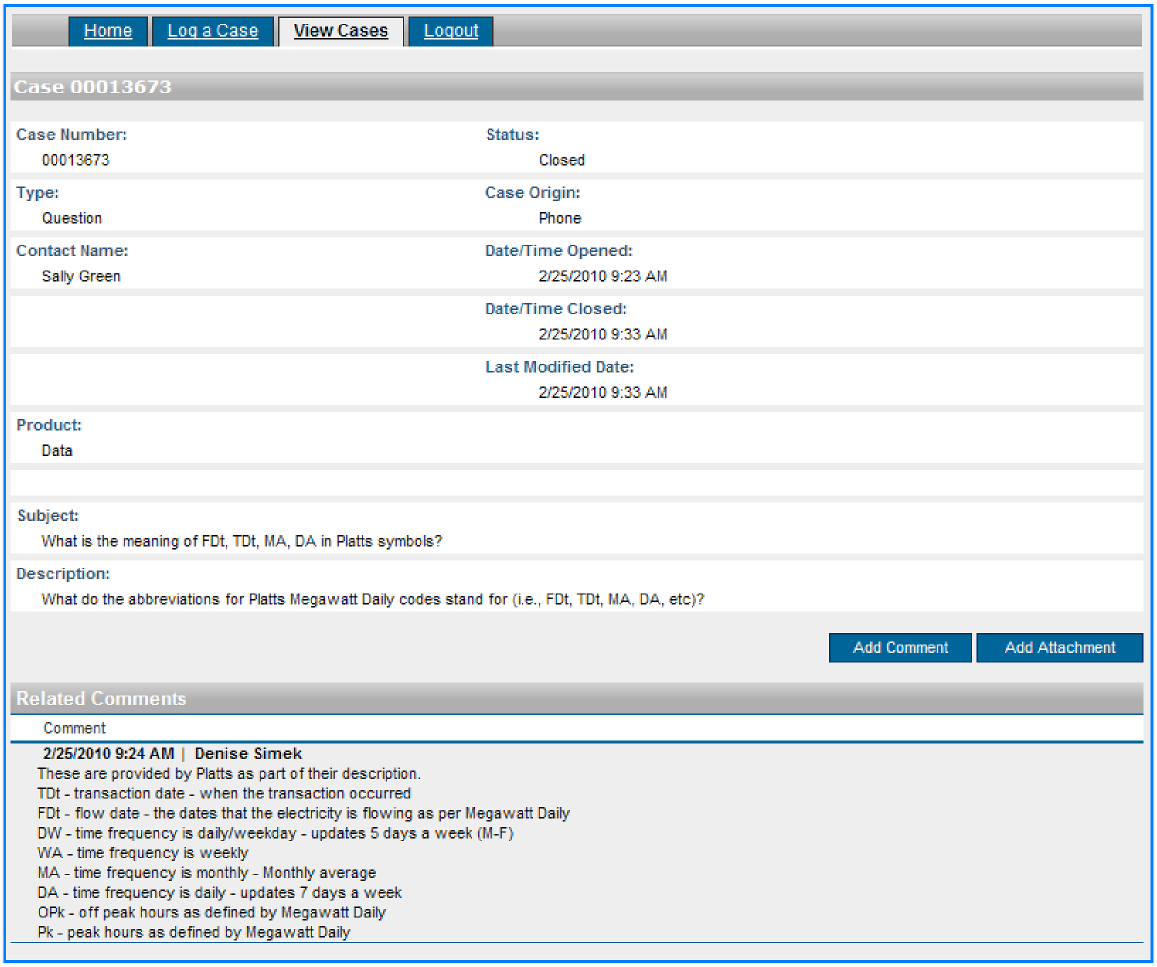
- After selecting **View all Cases**, you will be in the **All Open Cases** view.



- While in any of the various views, select a case subject to view the details of the case.

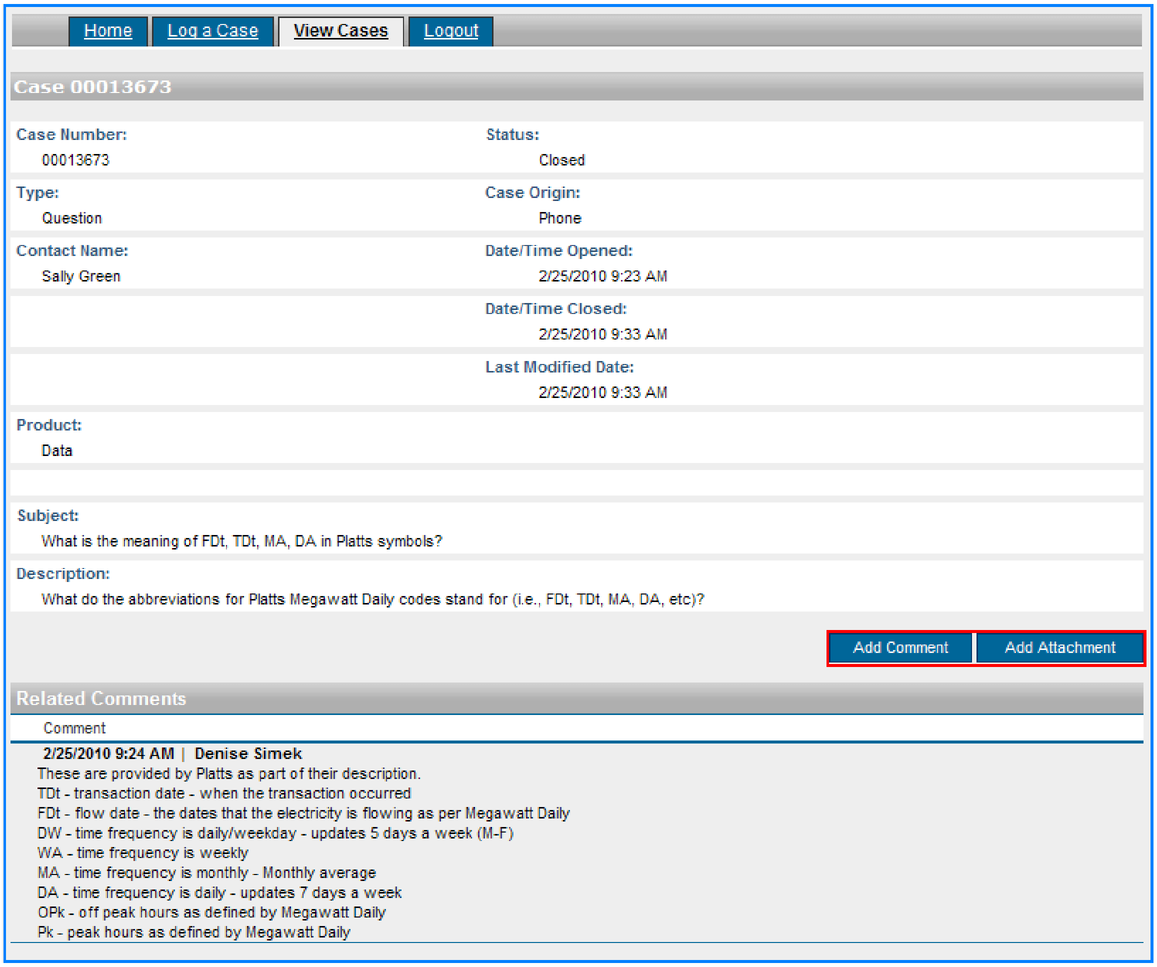


The case details are shown, including the case number, status, last modified date, and any comments that have been added to the case. Cases logged prior to the implementation of the Portal will not display case comments.

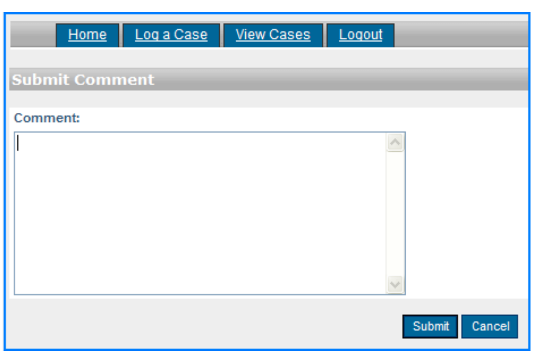


- Optionally, the **Home** tab displays all of your open cases when you log in. To view a case from the **Home** tab, click its subject.

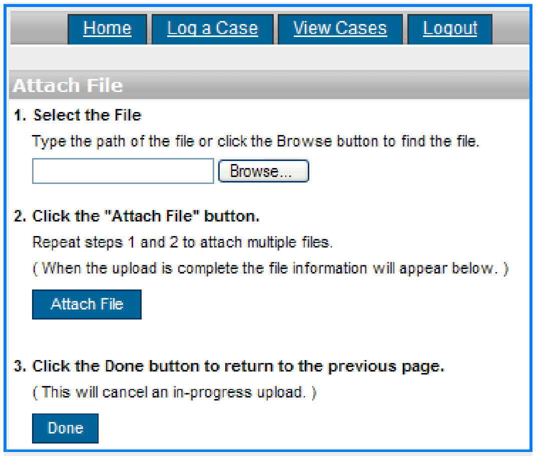
- Optionally, Add a Comment or Attachment to your case



- Click **Add Comment** to add a comment related to your specific case and Click Submit when done.



- Click **Add Attachment** to add a file to your specific case that you think would assist the support team in answering your inquiry. This can be any file but especially, a MIMIC Worksheet, XMIM query, or Excel Workbook



Logging a New Case

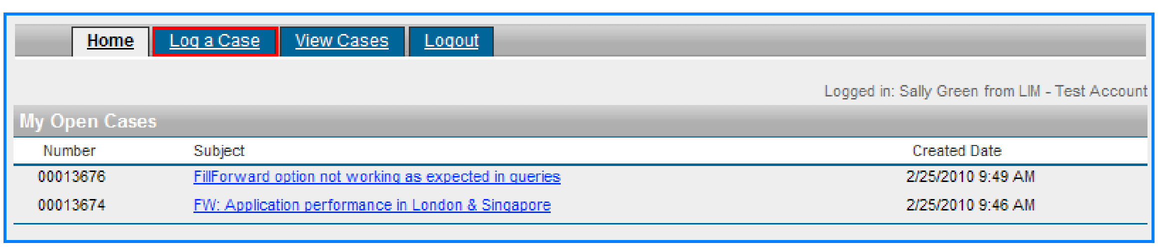
If you have a new inquiry, you can submit a case to our Customer Support team. There are 2 was to submit a case automatically; via email or through the portal

Via Email –

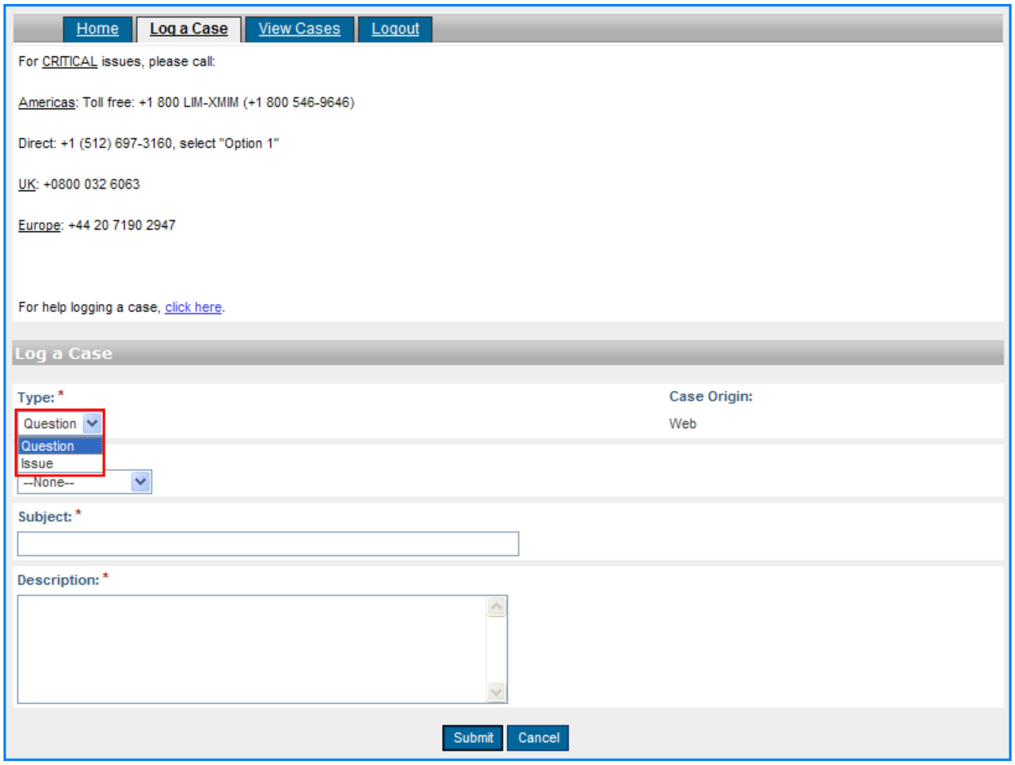
- Send an email to supportcases@lim.com including the details of your request or question.

Via the portal

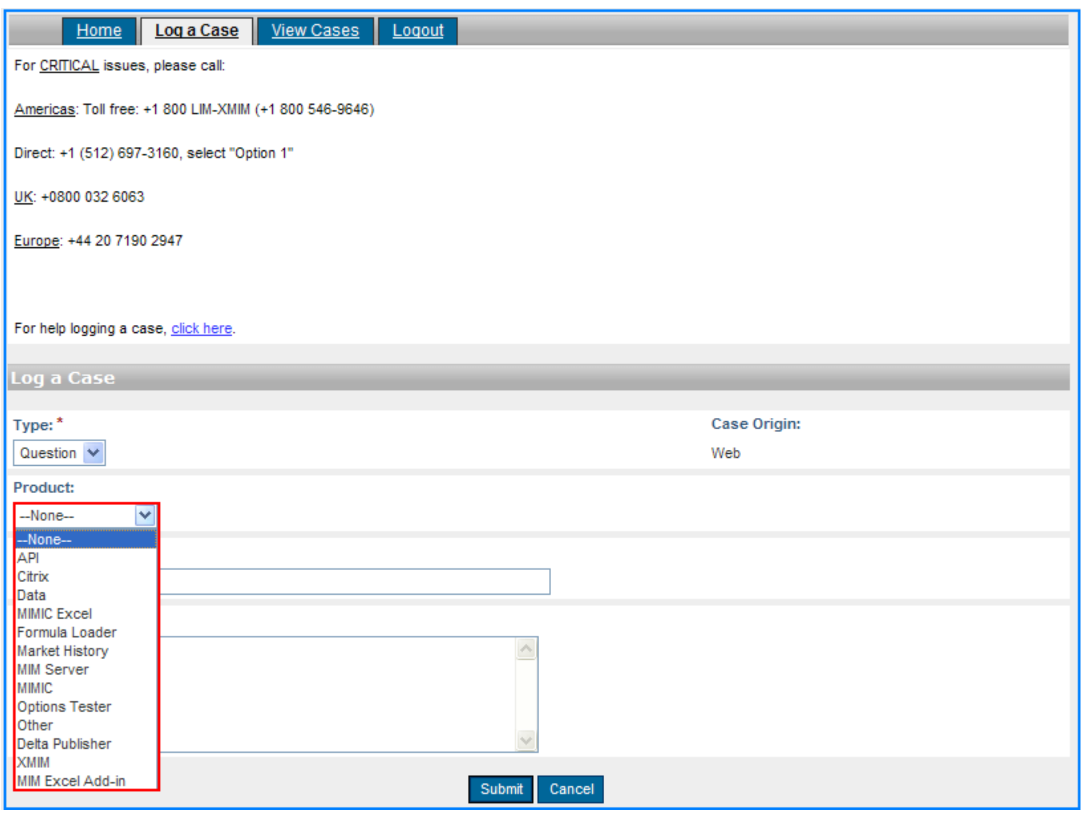
- Click the **Log a Case** tab.



- Select the type of case you are logging from the drop-down, either Question or Issue.



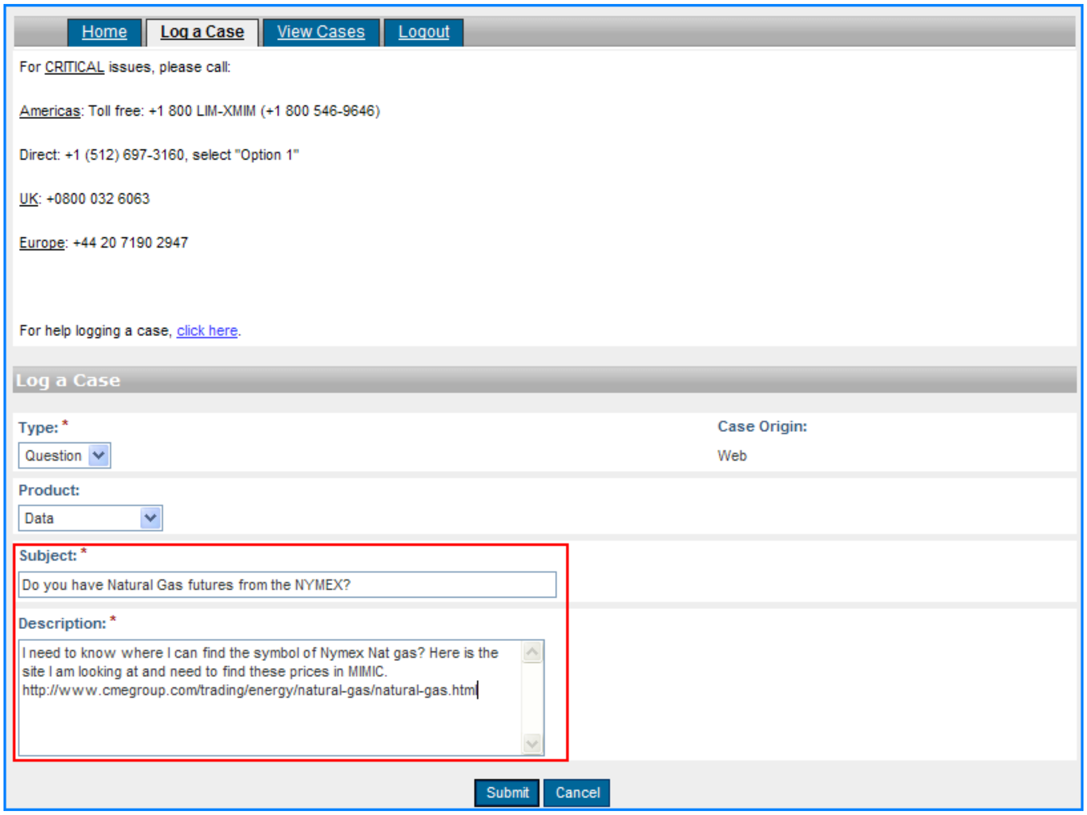
- Select the Product that the case is in reference to.



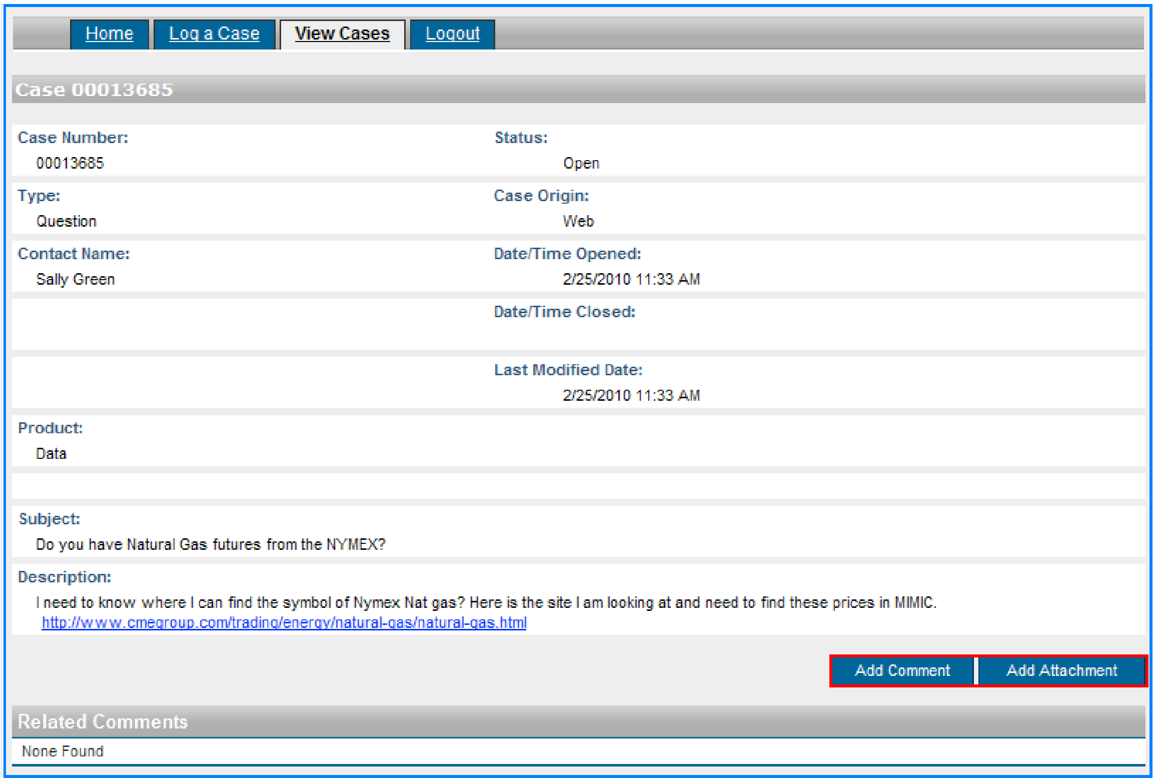
- Use guide to help select the appropriate product
  - **API** – Inquiry regarding API programming
  - **Citrix** - Inquiry regarding connecting /running the applications through the Citrix website
  - **Data** - Inquiry regarding the data (availability, location or source), data dispute or missing data issue
  - **MIMIC Excel** – Inquiry regarding running MIMIC worksheets inside Excel
  - **Formula Loader** – Inquiry regarding the Formula Loader that loads the data output from saved queries
  - **Market History** – Inquiry regarding subscription or content on Markethistory.com
  - **MIM Server** – Inquiry regarding Server questions or issues
  - **MIMIC** – Inquiry regarding usage or behavior of the MIMIC application
  - **Options Tester** – Inquiry regarding usage or behavior of the MIMIC application
  - **Other** – Select if none of the products represents your inquiry
  - **Delta Publisher** – Inquiry regarding usage or behavior of the Delta Publisher
  - **XMIM** – Inquiry regarding usage or behavior of the XMIM application
  - **MIM Excel Add-in** – Inquiry regarding usage or behavior in the MIM Excel Add-in (not to be confused with the MIMIC Excel)

*If you are logging a case regarding the data then the product is Data regardless of which application you are using.

- Enter a subject and description for your case. Enter as much information as you can to assist our Customer Support reps in responding to your inquiry.
- Click **Submit** to complete the issue



- Once the issue is submitted, click **Add Comment** to add additional comments related to your specific case.
- Additionally, you can click **Add Attachment** to add a file to your specific case that you think would assist the support team in answering your inquiry.



Email Notifications

Email notifications will be sent when the following actions take place.

- You, as a customer/user, log a case through the portal – Email is sent to the user and LIM support indicating a new case has been created
- You, as a customer/user, adds a comment or an attachment to an issue – LIM Support gets an email indicating that the case has been updated
- LIM support staff enters a public comment – You, as a customer/user, gets an email indicating that the case has been updated.
- LIM support staff closes the case - User gets an email indicating the case has been closed