Crestwood Associates
ERP Solution Experts

Social Media

Crestwood Associates provides support services to clients to ensure they are fully leveraging their Acumatica, Cloud Services, Dynamics 365 Business Central, Dynamics GP, Dynamics SL, Greentree, and Office 365 solutions. Our in-house dedicated technical Support Team will provide you with the support and resources that will enable you to quickly address technical issues and get you back to work faster.

Overview

Crestwood Associates is an award-winning Acumatica and Microsoft certified partner with proven success in 5,000+ ERP implementations. For more than 20 years, Crestwood Associates has been providing innovative technology solutions to accelerate operational efficiencies for mid-market organizations. Best known for delivering unparalleled value to their clients, Crestwood serves thousands of clients nationwide, and is rapidly expanding reach across the United States.

For more information about Crestwood or ERP solutions, visit **crestwood.com**

HOW TO ACCESS THE CRESTWOOD SUPPORT PORTAL

The Crestwood Support Portal is a new online support tool that will allow clients to submit and track support ticket requests.

Great customer service is invaluable. We know the core of client support and the first step to building a great client experience is a powerfully easy system for tracking, prioritizing, and solving your support tickets. That's why we're excited to launch our new Client Support Portal.

THE BENEFITS YOU CAN EXPECT WITH OUR NEW TICKETING SYSTEM

- Self-serve online client support portal
- Real-time updates of your open tickets
- Built in service history reporting
- Transparent customer service performance
- Enhanced quality of support interactions
- Streamlined communication with support consultant
- Ability to provide feedback of support experience

TO GET STARTED

Contact your Crestwood Client Account Manager to obtain your credentials or visit our **Support Portal** for more information. Each Crestwood client will be allotted up to three (3) user accounts. There are three portal user types to consider: Administrator/Business Lead Contact, Support/Technical contact, and Finance contact. Once you have designated your user type, provide your company name, user name and user email address to your Client Account Manager or Crestwood Support.

TO ACCESS THE PORTAL

Once you have your credentials set up, to access the portal go to: portal.crestwood.com.

TO NAVIGATE THE PORTAL

When you log into the portal for the first time, you will be taken to home page where you will be able to see your company's statements, documents, contacts and edit your personal user profile.

Click on the **Support tab** in your left hand column, then select **New Case**. Displayed on the new case page are the levels of priority as seen below:

Priority	Definition	Response/ Resolution Time
Urgent	Critical failure in the operational activity of services or an error that causes services to be severely impacted or completely shut down.	**1 Hour Response Time**
High	High-impact issues where services are inoperable or seriously degraded where a short-term workaround is available.	**Same Business Day Response**
Medium	Issue limits functionality or usefulness of services but condition is not critical to continued operation of service. A workaround is readily available with no operational impact.	**Next Business Day**
Low	Minimal problems arising from a misleading or unsatisfactory component or feature. Problem can be circumvented with no impact to operations or data integrity.	**Schedule as Available**

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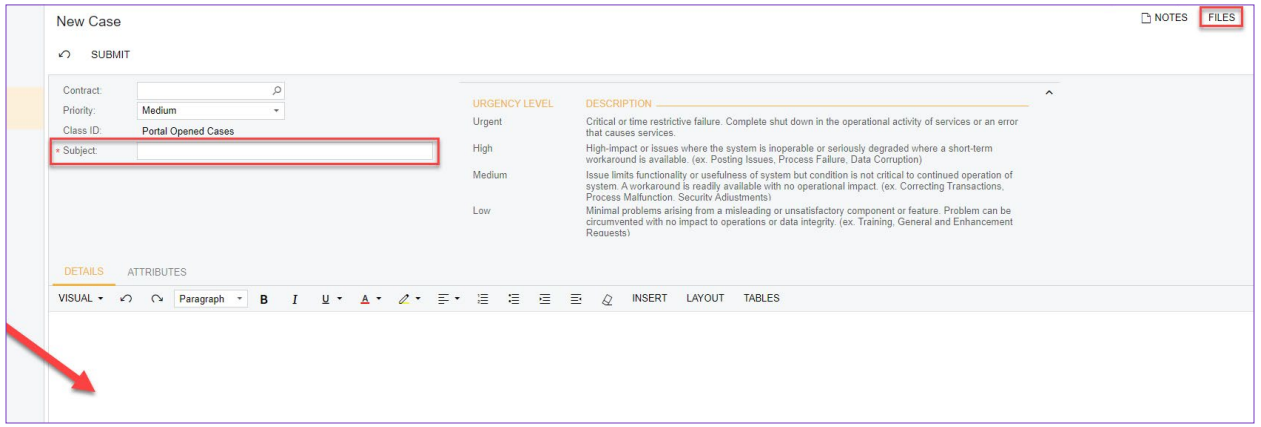
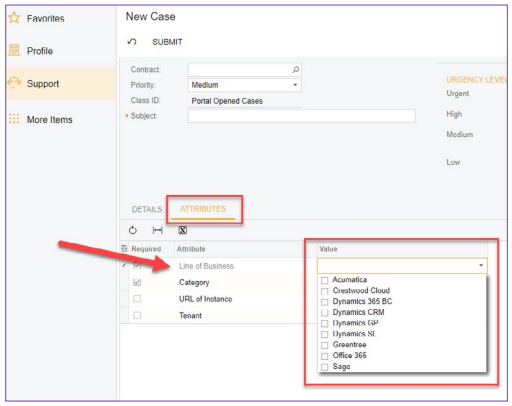
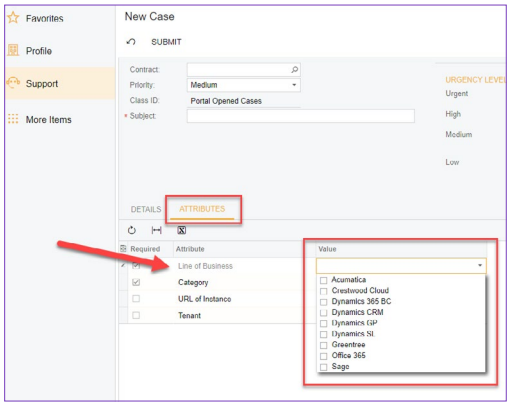
Once you have selected your priority level, you can enter the description of your case in the space provided below the urgency descriptions. You can also insert screenshots or attach files.



When you have entered all the details of your case, click on the **Attributes** tab. There are two attributes that are required to log your case: **Line of Business** and **Category.** Line of business is the product that you are using and category is the area where you are having issues with (i.e. system down, financials, new user request). You can select more than one category where your issue is occurring.





For our **Acumatica users**, we do ask that you insert the **URL** where your issue has occurred, as well as the **Tenant** if it is not your main tenant. Adding your tenant will help cut down on time spent locating where the issue has occurred and solve your case faster.

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After you have entered all of the details of your case, click the **Submit** button at the top of your screen. Keep in mind that once you submit your case you will not be able to edit or make changes, so it's important to be as detailed as possible when entering the details of your case.

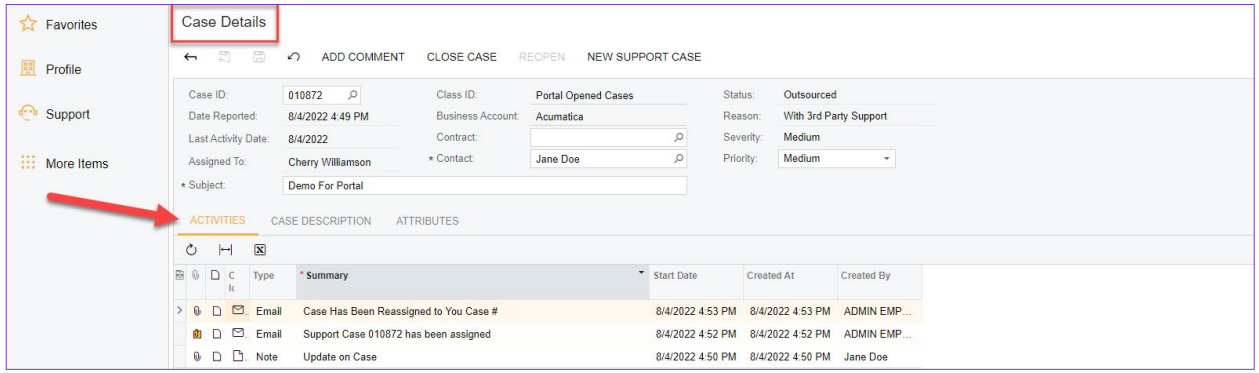
Once you hit the **Submit** button, Acumatica will then take you to a screen with all of the **Case Details** that you have submitted. Here you will be able to see the status, the reason, the severity and the priority of your case.

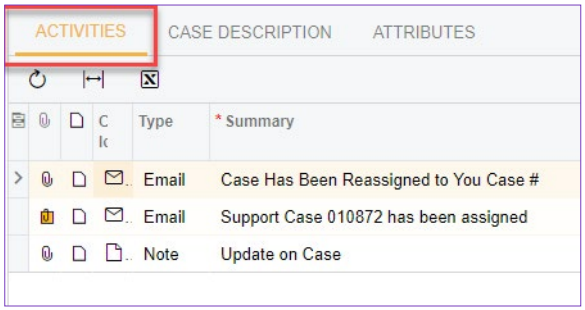
Note: the severity of the case is defaulted to medium, it's the priority level which initiates the action of how fast your case will be resolved.

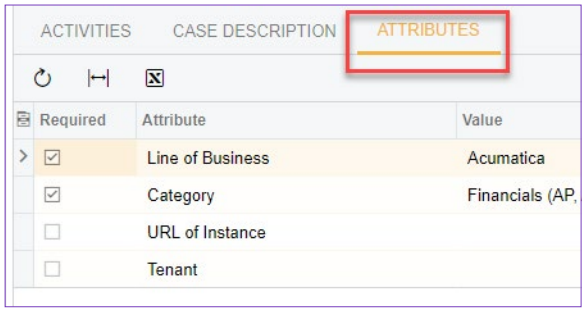
On the **Case Details** screen you will also find three tabs that give you a summary of the case you submitted.

- **Activities:** Allows you to view all email correspondence in regards to that case.
- **Case Description:** Allows you to see a description of the case you submitted.
- **Attributes:** Allows you to view the attributes you initially submitted. You can go in this area and modify the categories, but we ask that you keep to the original so that there is no confusion.

Once you have submitted your case, you can close out of the Crestwood Support Portal and await a response.







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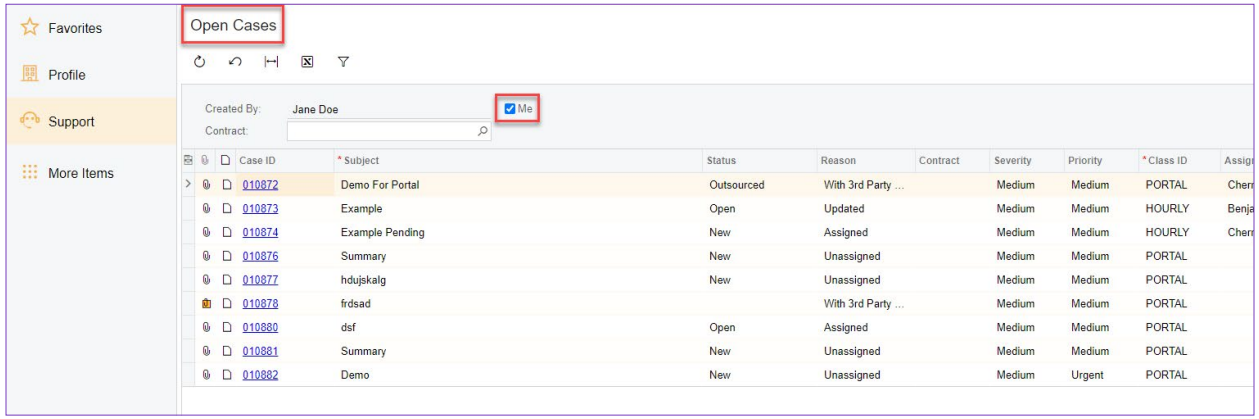
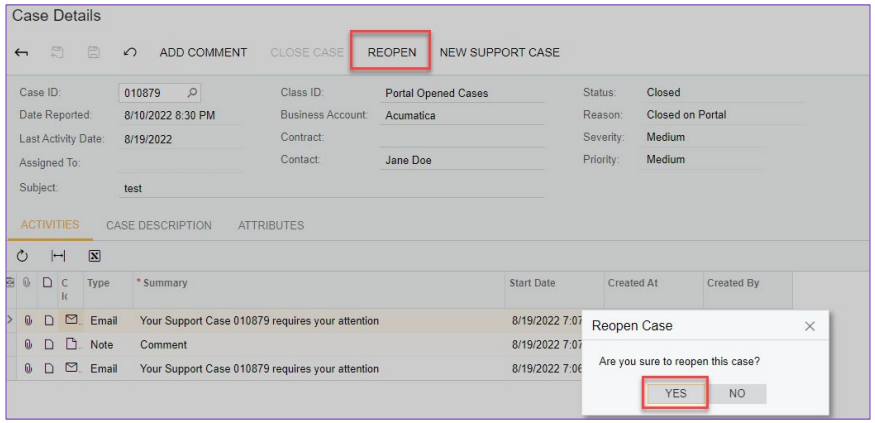
TO VIEW OPEN CASES

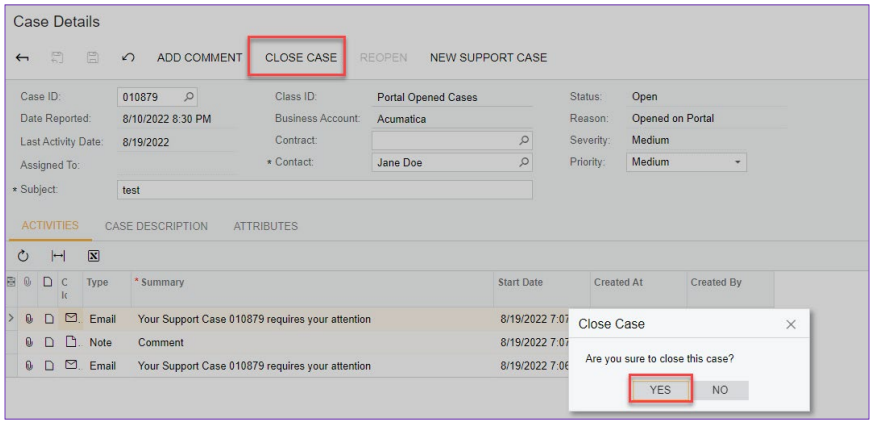
Log back into the **Crestwood Support Portal** and click the **Support** tab on the left-hand side tool bar, then click **Open Cases**. Acumatica defaults to all cases opened by your user name, if you would like to see cases submitted by other members of your organization, simply **uncheck "Me"** at the top.



TO VIEW AND REOPEN CLOSED CASES

On the home page, click the **Support** tab then click on **Closed Cases** in the menu. A list of closed cases will appear, select case you would like to reopen, then click **Reopen**. A dialog box will appear asking you to confirm **Reopen Case**, click **Yes**. When the case is resolved you can simply select **Close Case** in the **Case Details**, then confirm close of case and click **Yes**.





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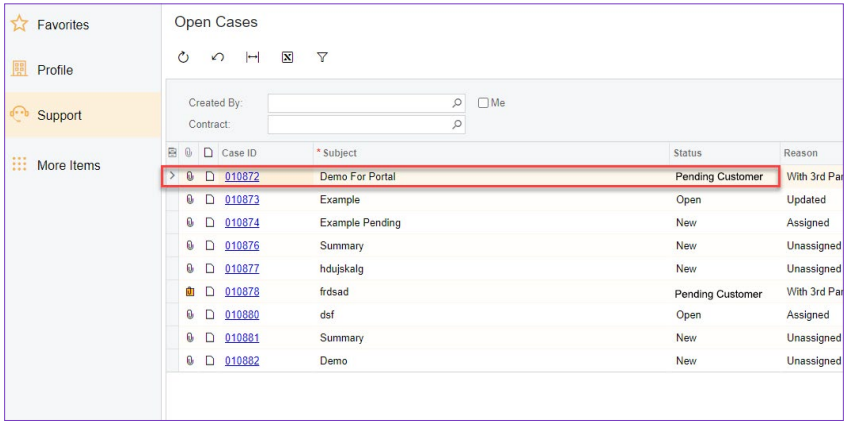
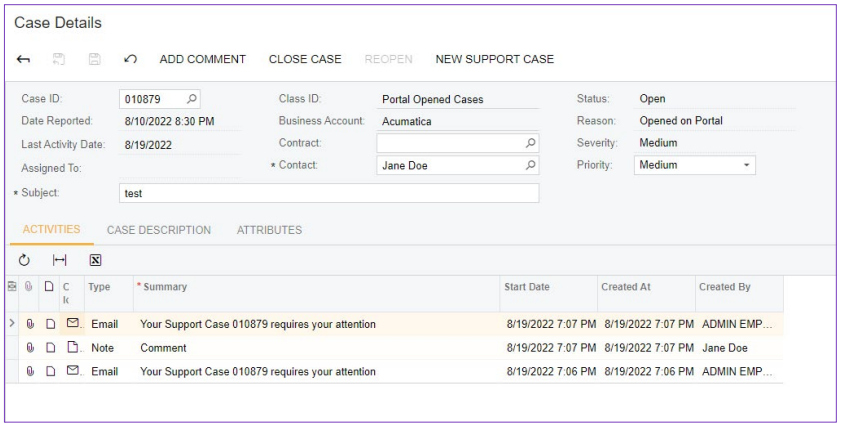
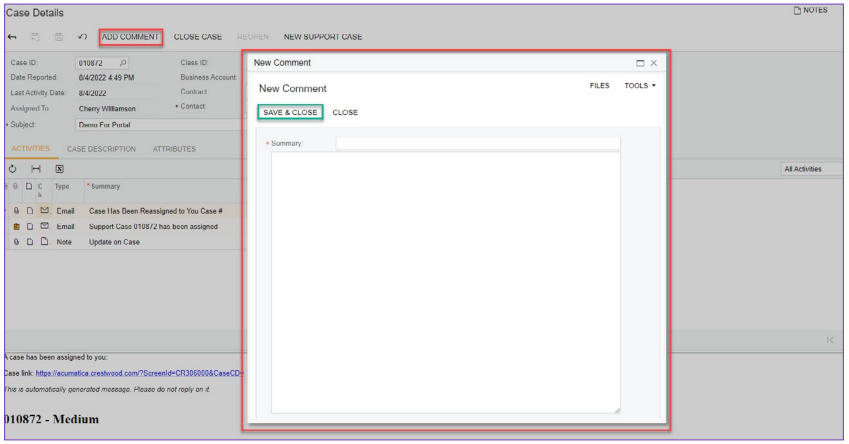
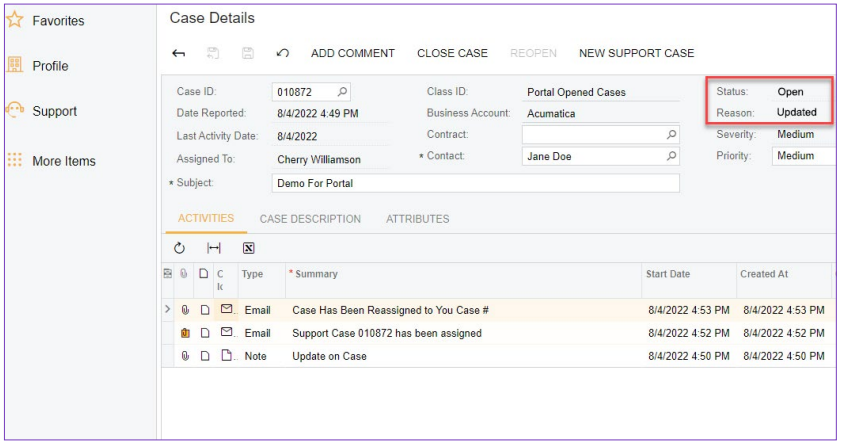
CASES PENDING CUSTOMER RESPONSE

In the **Open Cases** section of the portal, click on the case that displays **Pending Customer** in the **Status** column. This will open up the case details page and allow you to correspond with Crestwood Support directly within Acumatica.





RESPOND TO CRESTWOOD SUPPORT

You can either respond to the email in your inbox or add a comment directly into the case details. Click save and close when you've entered all details to your response. Once you have saved and closed your comment, the system will update your status to **Open** and reason to **Updated** which will then inform Crestwood that your case needs attention.