

# Customer Portal

## Case management

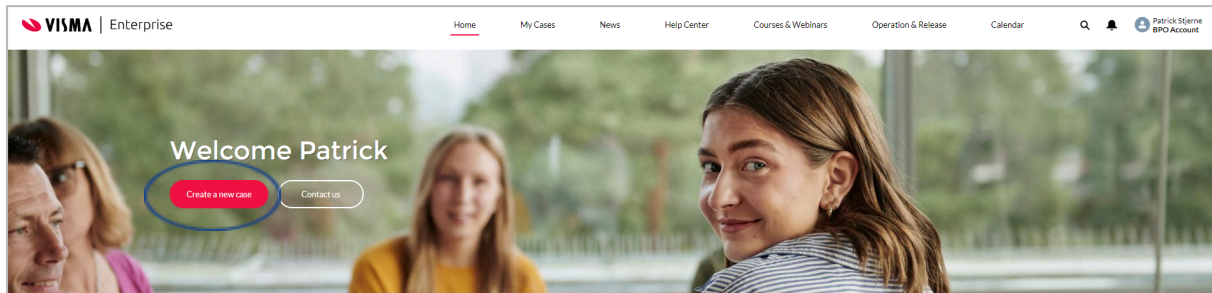
Visma Enterprise  
March 2024

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# Create a case

Select 'Create a case' on the homepage



Fill out fields marked with a red star \*

A screenshot of the 'Create a case' form. The form contains several fields: 'Account' (dropdown menu), 'Product' (dropdown menu), 'Subject' (text input), and 'Description' (text area). Below these is a 'Private' checkbox, which is circled in red. At the bottom of the form is a 'Save' button, also circled in red. There is also a section for 'Add Files' with an 'Upload Files' button and a dashed box for 'Or drop files'.

If you choose 'Private', only you and Visma Enterprise can see the case.

You can attach files to the case.

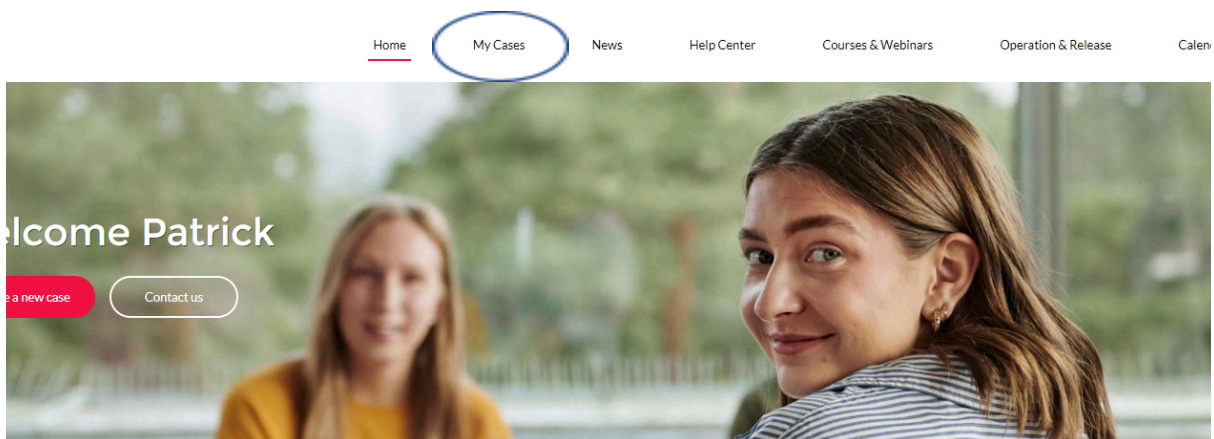
Remember to finish by pressing 'Save'.

You can 'add followers' who you wish to be informed about the case. You can also remove followers again via the same area. To be able to add a follower to the case, the person must have a user profile with access to the product the case concerns.



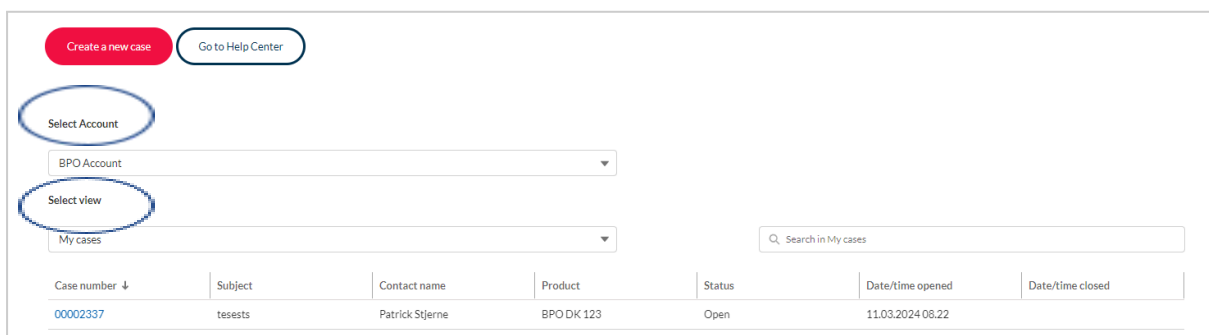
## How to see existing cases

If you want a quick overview of your cases, this can be found on the homepage at the top under 'My cases'. Here you can see cases, title, status, etc.



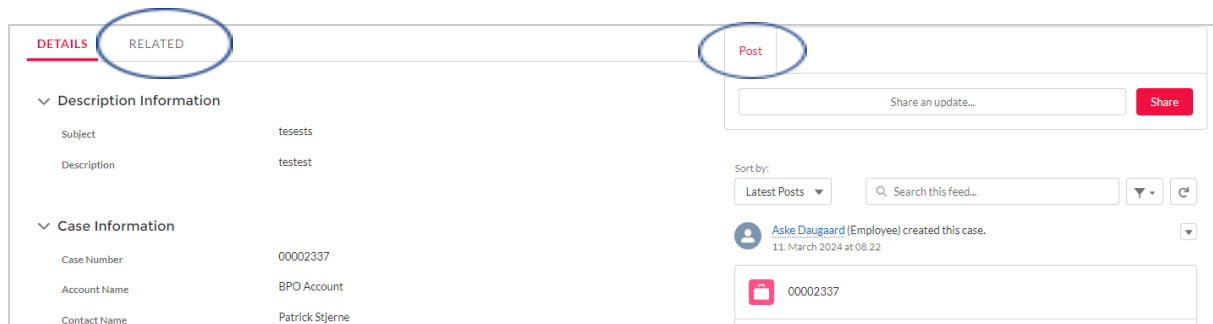
If you have multiple solutions or customer relations, you can switch between these under the item 'Select Account'.

You can also switch between all cases, open cases, and cases you follow by pressing 'Select view'.



## Messages to and from Visma Enterprise

If you wish to contact Visma Enterprise about a case or see status and messages from Visma Enterprise, you will find these option inside the individual case.



Under the 'Posts' section, you can write messages by pressing in the 'Share an update' field. You can add text, links, and pictures. These messages can be read by everyone with access to the case.

Files attached to the case are located under the 'Related' section. Here you can see already attached files and upload new files that you wish to add."