



**SOLERA CASE SUBMISSION GUIDELINE**  
SOLERA SERVICE DESK

## 1. Table of Contents

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1. OVERVIEW .....	2
2. WAYS TO REQUEST SUPPORT .....	2
3. CUSTOMER PORTAL.....	2
Submitting a Case .....	2
Logging into Solera’s Customer Support Portal – Customer Portal.....	2
Requesting Access to the Customer Portal .....	2
Dashboard .....	3
Accessing the Knowledge Base .....	3
Submit a Case .....	3
Checking Case Status .....	6
My Cases Page .....	7
Updating the Case.....	8
Case Resolution .....	10
Reset your Password.....	11

## Overview

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This guide will demonstrate how to request support or report an incident with Solera and detail the process of submitting a helpdesk case online.

## Ways to Request Support

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As a customer of Solera solutions, there are different options for requesting support or reporting an incident. They are: submitting a case online through Portal or e-mailing the support desk directly.

## Customer Portal

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### Submitting a Case

Submitting a case is the preferred way of requesting support and reporting issues to Solera. When you are provided access to a Solera solution, you are also provided credentials to access the Customer Portal. Additionally, anyone who works within an organisation that uses a Solera solution can request access to the Customer Portal to request support and report incidents.

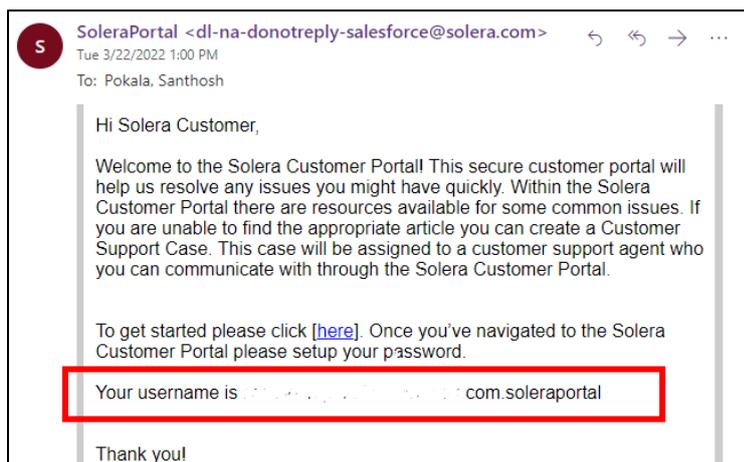
### Requesting Access to the Customer Portal

There are two ways to request access to the Customer Portal.

1. Have an existing user create a case using the Customer Portal to request access.
2. Send an email to Support Team

Once enabled, Customer will receive a "**Welcome to SoleraPortal**" email that includes a link that allows you to set your password for the portal.

- To access the Customer Portal website, click [here](#)
- **Username** = Is provided in the email that you receive when you are enabled to the Portal.
- **Password** = What you set by clicking on the link in the email (Ex- email is below)



## Dashboard

When logging into the Customer Portal you are presented with the dashboard. From this screen you can 'Submit a Case, 'Access the Knowledgebase' and 'Check Status'.

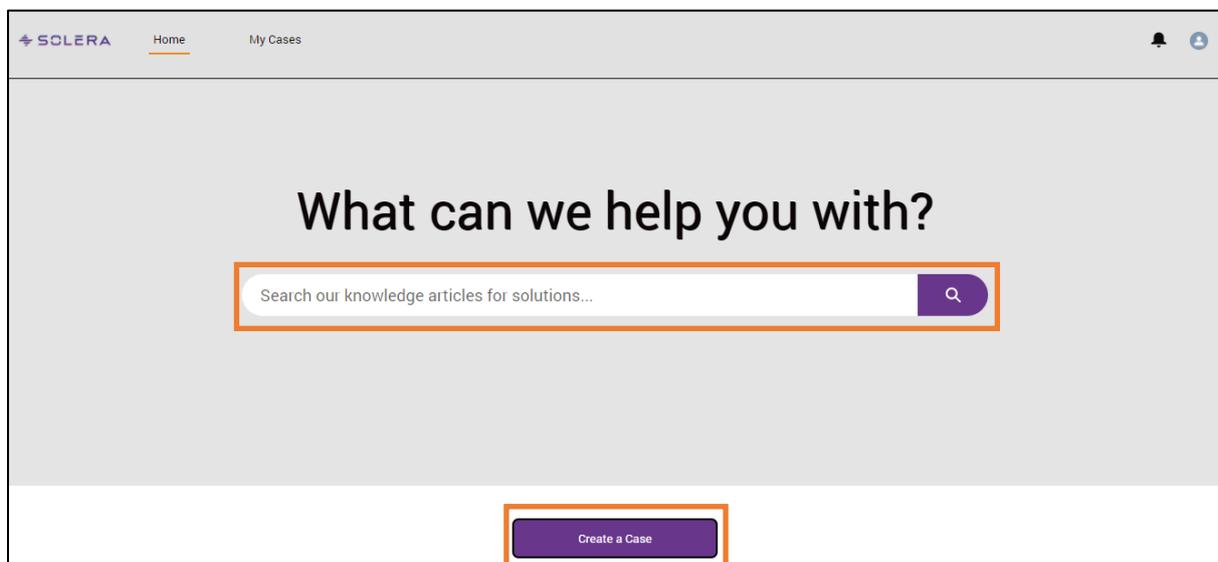
## Accessing the Knowledge Base

**Note:** Knowledge Articles are available only if there are any solution articles published by the Support Team.

Once logged into the Customer Portal, you can access the Knowledge Base. This section provides user guides, learning videos and general documentation around Solera related products. Type your question in the **Search** field and click the **magnifying glass** icon.

## Submit a Case

To submit a case, click on the **Create a Case** button at the bottom of the page. See below:



Once selected, type the subject in the **Subject** field. Next, input information about the issue you are experiencing in the **Description** field. It is best practise to be as thorough as possible. Click the **Product** field to search for the product you wish to request support for or report an incident against.

**Note:** You need to type at least the first three characters of the product name and click on the Product or press enter to see the full list that starts with those 3 characters.

**SOLERA** Home My Cases

### Case Creation

Please enter the relevant information in the fields below

- In the **Subject** field please enter the Product Name followed by a short description of the issue
- In the **Description** field please enter a more detailed description of the issue
- In the **Product** field, enter and choose the relevant product
- Click the **Upload File** icon to attach a screenshot or a relevant file, if necessary

Need Answers Fast?  
Find what you need here.

Subject **i**

Description **i**

Product  
Search Products... **Q**

Country  
Australia

**U** Upload File

**Submit**

Click the **Upload File** button or one of the other links to locate the attachment(s). Select the attachment(s) and click the **Add** button.

### Select File

**U** Upload File

**U** Upload File

You don't have any files here. Try a different filter, or upload a file.

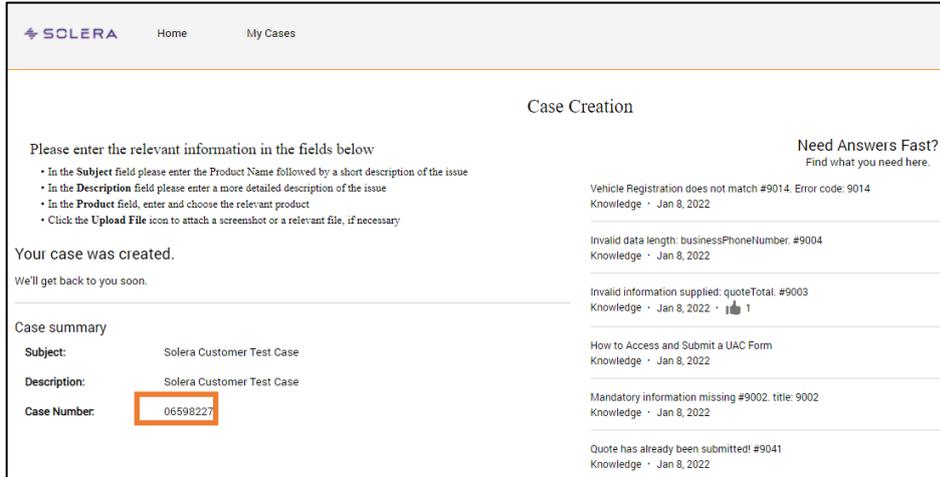
- Owned by Me
- Shared with Me
- Recent
- Following

0 of 10 files selected

Cancel **Add**

Once all information has been input click the **Submit** button at the bottom of the page.

Once submitted a message shows you the **Case Number**.



**SOLERA** Home My Cases

### Case Creation

Please enter the relevant information in the fields below

- In the **Subject** field please enter the Product Name followed by a short description of the issue
- In the **Description** field please enter a more detailed description of the issue
- In the **Product** field, enter and choose the relevant product
- Click the **Upload File** icon to attach a screenshot or a relevant file, if necessary

**Need Answers Fast?**  
Find what you need here.

Your case was created.  
We'll get back to you soon.

**Case summary**

**Subject:** Solera Customer Test Case

**Description:** Solera Customer Test Case

**Case Number:** 06598227

Vehicle Registration does not match #9014. Error code: 9014  
Knowledge · Jan 8, 2022

Invalid data length: businessPhoneNumber: #9004  
Knowledge · Jan 8, 2022

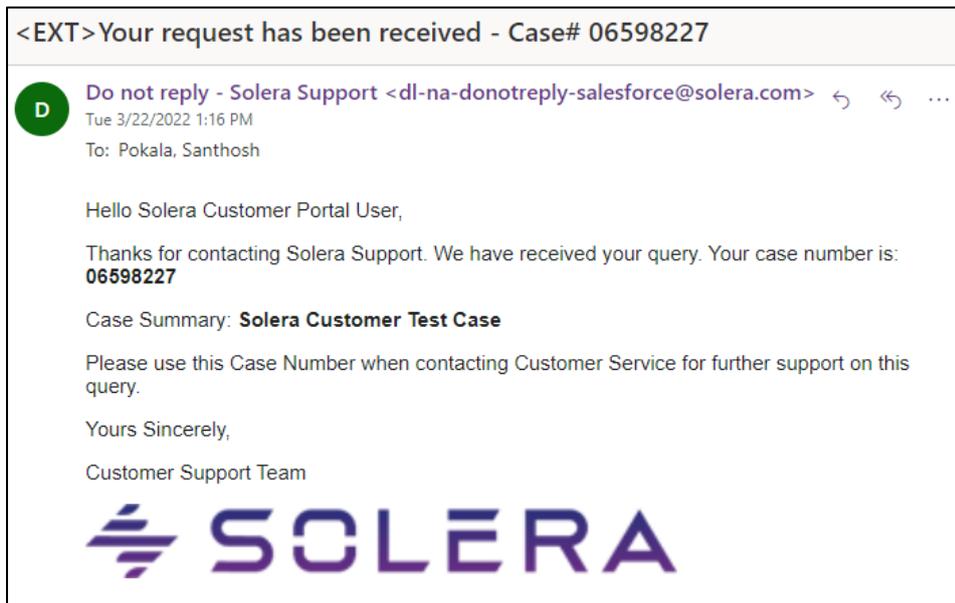
Invalid information supplied: quoteTotal: #9003  
Knowledge · Jan 8, 2022 · 👍 1

How to Access and Submit a UAC Form  
Knowledge · Jan 8, 2022

Mandatory information missing #9002. title: 9002  
Knowledge · Jan 8, 2022

Quote has already been submitted! #9041  
Knowledge · Jan 8, 2022

Once the case is created, an auto email will be sent with the case details. See below:



In the email, you are provided a unique incident number. This number is now a reference point if you were to call Solera for an update on your service request or incident. Reference this unique number and any support agent you speak with will be able to assist.

## Checking Case Status

After a case has been submitted, the status can be checked by clicking the **Case Number** or directly from the dashboard by clicking the **My Cases** link at the top of the page.

**Case Creation**

Please enter the relevant information in the fields below

- In the **Subject** field please enter the Product Name followed by a short description of the issue
- In the **Description** field please enter a more detailed description of the issue
- In the **Product** field, enter and choose the relevant product
- Click the **Upload File** icon to attach a screenshot or a relevant file, if necessary

Your case was created.  
We'll get back to you soon.

**Case summary**

**Subject:** Solera Customer Test Case

**Description:** Solera Customer Test Case

**Case Number:** 0659822

**Need Answers Fast?**  
Find what you need here.

- Vehicle Registration does not match #9014. Error code: 9014 Knowledge · Jan 8, 2022
- Invalid data length: businessPhoneNumber. #9004 Knowledge · Jan 8, 2022
- Invalid information supplied: quoteTotal. #9003 Knowledge · Jan 8, 2022 · 1
- How to Access and Submit a UAC Form Knowledge · Jan 8, 2022
- Mandatory information missing #9002. title: 9002 Knowledge · Jan 8, 2022
- Quote has already been submitted! #9041 Knowledge · Jan 8, 2022

Once you click the case number link you can see the Details of the case including the

- Case Comments
- Attachments
- Articles

**Case**  
Solera Customer Test Case

+ Follow Printable View Clone

Status: New Case Number: 06598227

**Company and Contact Details**

Account Name: Solera Customer Company phone #

Contact Name: Solera Customer Portal User Contact Phone:

Country: Australia

Status: New

**Issue Details**

Subject: Solera Customer Test Case

Description: Solera Customer Test Case

**Case Comments (0)** New

**Attachments (1)** Upload Files

Agent Avatar Image  
Mar 22, 2022 · 3KB · png View All

**Survey Invitations and Responses (0)**

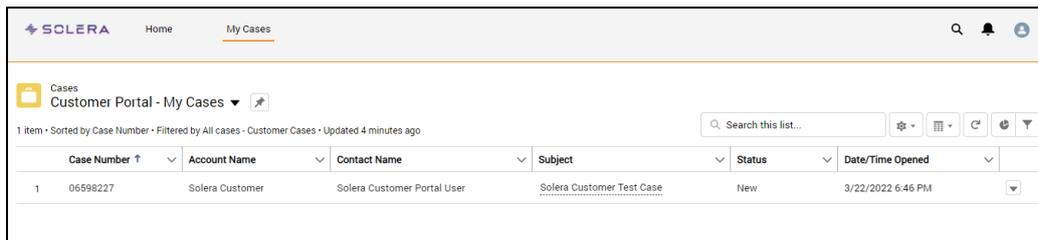
**Articles (0)**

## My Cases Page

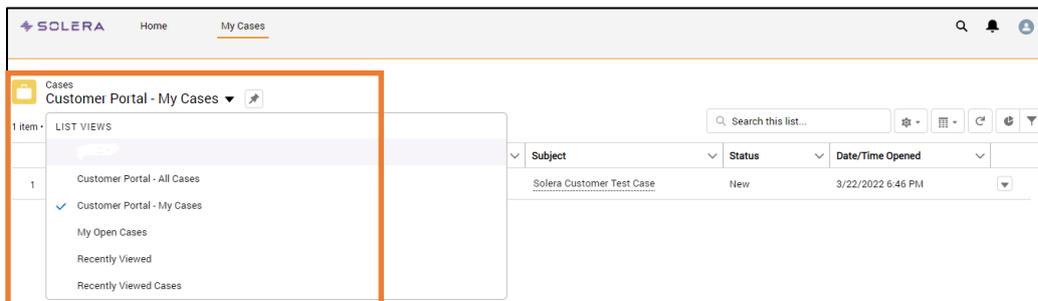
Click the **Cases** drop-down menu to filter the case list.

Current and historical cases have different views

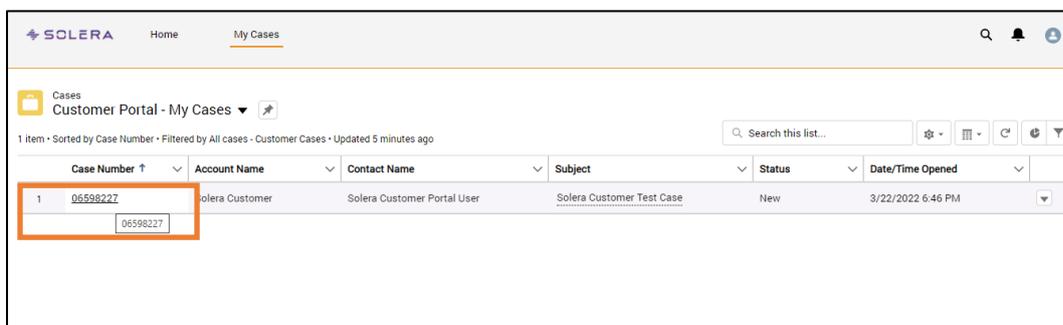
- **Customer Portal-My Cases:** Shows all active and historical cases created by the logged in customer.
- **Customer Portal-All Cases:** Shows all active and historical cases created by everyone in the company.



Case Number ↑	Account Name	Contact Name	Subject	Status	Date/Time Opened
1	Solera Customer	Solera Customer Portal User	Solera Customer Test Case	New	3/22/2022 6:46 PM



Case Number ↑	Account Name	Contact Name	Subject	Status	Date/Time Opened
1	Solera Customer	Solera Customer Portal User	Solera Customer Test Case	New	3/22/2022 6:46 PM



Case Number ↑	Account Name	Contact Name	Subject	Status	Date/Time Opened
1	Solera Customer	Solera Customer Portal User	Solera Customer Test Case	New	3/22/2022 6:46 PM

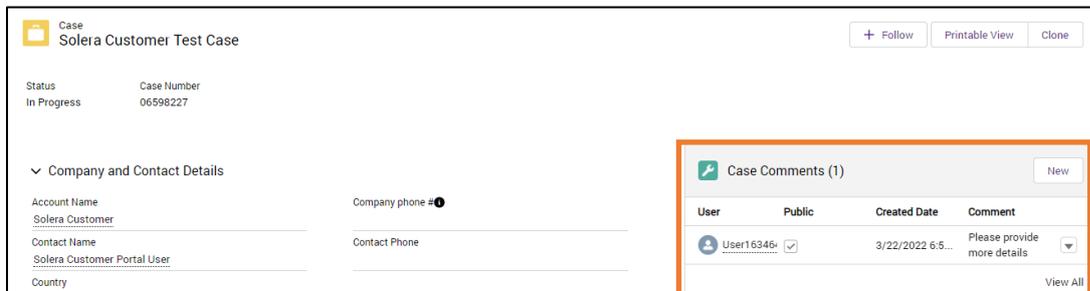
Click on the Case Number to see the Complete Case Details

You can see the below case information in the case detail page:

- Case Number
- Subject
- Status
- Company Name
- Contact Name
- Company Phone
- Contact Phone
- Country
- Description
- Resolution

## Updating the Case

You can use the **Case Comments** section to add updates to the case or view any comments added by the support agent.



The screenshot shows a case detail page for 'Solera Customer Test Case'. The status is 'In Progress' and the case number is '06598227'. The 'Company and Contact Details' section includes fields for Account Name, Contact Name, Company phone #, Contact Phone, and Country. The 'Case Comments (1)' section is highlighted with an orange box and contains a table with one comment.

User	Public	Created Date	Comment
User16346	<input checked="" type="checkbox"/>	3/22/2022 6:5...	Please provide more details

You can add new attachments or view any attachments added by the support agent in the **Attachments** section.



### Attachments (1)

[Upload Files](#)



**Agent Avatar Image**

Mar 22, 2022 • 3KB • png

[View All](#)

You can see any articles attached to the case by the support agent in the **Articles** section.



### Case Comments (2)

[New](#)

User	Public	Created Date	Comment
 A1A1	<input checked="" type="checkbox"/>	15/10/2021 4:12 AM	Here is more detail. <span style="float: right;">▼</span>
 User163050566	<input checked="" type="checkbox"/>	15/10/2021 4:09 AM	Please add more details <span style="float: right;">▼</span>

[View All](#)



### Attachments (2)

[Upload Files](#)



**solution-brief-qapter**

15/10/2021 • 291KB • pdf



**QE1012RG-ADXE -Qapter Claims Manager Comparison-1021**

15/10/2021 • 6.9MB • pptx

[View All](#)

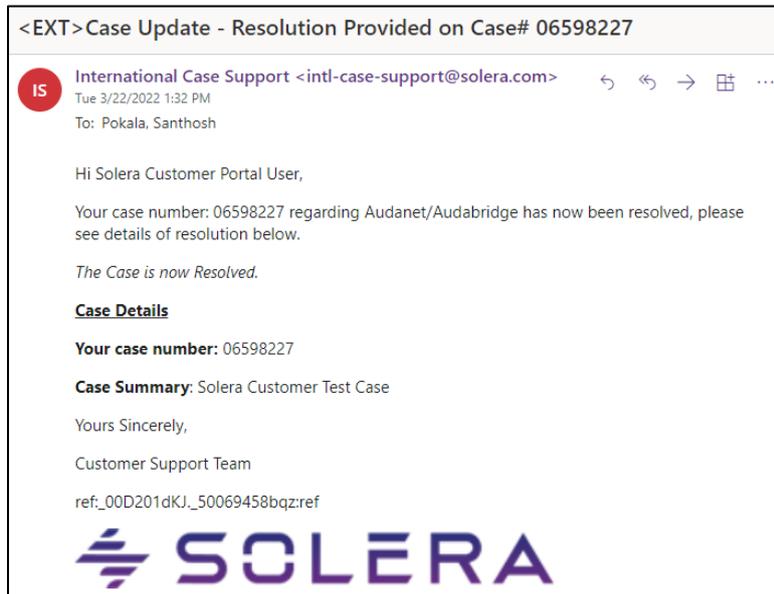


### Articles (0)

## Case Resolution

When your request has been actioned and marked as resolved, an email is sent advising of the resolution. The email will contain any resolution notes as to the reason why the case has been resolved. See image below.

When the issue reoccurs or is not resolved, either reply to the email or add a comment to the case in the Customer Portal.

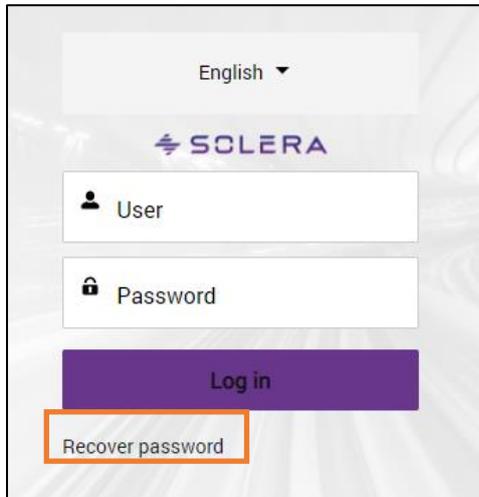


When the case is closed, an email will be sent with a survey.



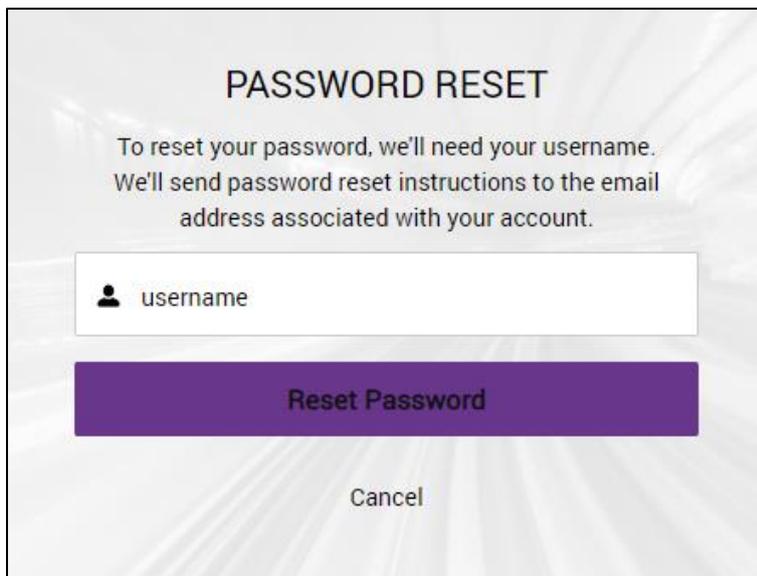
## Reset your Password

When you have forgotten your password, you will be able to reset it from the Customer Portal log in page by selecting on the **Forgot your Solera Service Desk Password** link.



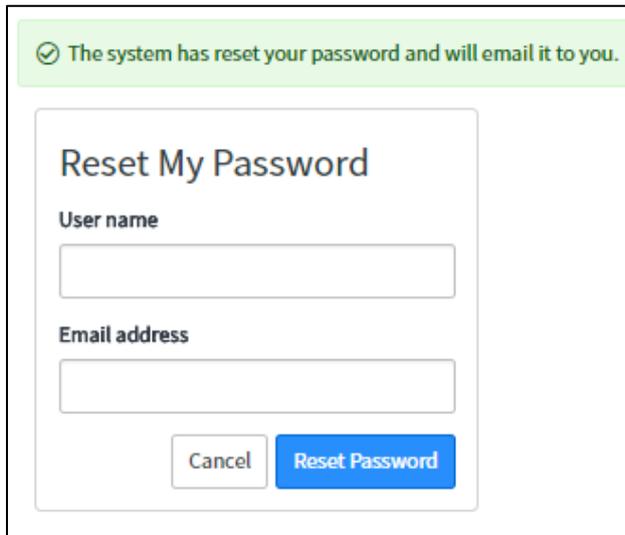
The screenshot shows the Solera login interface. At the top, there is a language selector set to "English". Below it is the Solera logo. There are two input fields: "User" and "Password". A purple "Log in" button is positioned below the password field. At the bottom left, a link labeled "Recover password" is highlighted with an orange border.

Once selected, you will be redirected to a new page asking for your Username. Once this information has been entered, click the **Reset Password** button.



The screenshot shows the "PASSWORD RESET" page. The title "PASSWORD RESET" is centered at the top. Below it, the text reads: "To reset your password, we'll need your username. We'll send password reset instructions to the email address associated with your account." There is a single input field with a user icon and the placeholder text "username". Below the input field is a large purple button labeled "Reset Password". At the bottom center, there is a "Cancel" link.

Once the 'Reset Password' button has been selected, you will be emailed a temporary password. This page will also advise you that your password has been reset.



The screenshot shows a web interface for resetting a password. At the top, a green banner with a checkmark icon contains the message: "The system has reset your password and will email it to you." Below this is a white box titled "Reset My Password". Inside the box, there are two input fields: "User name" and "Email address". At the bottom of the box are two buttons: "Cancel" and "Reset Password".

Once you log in with your new password, you will need to reset it.

*We are continually striving to improve the services we deliver to you. The features described above include those that have been put forward by the insurer and repairer community as well as ideas and suggestions put forward by the Solera team. We welcome your feedback on the products and services we provide so that we can continue to improve the services we deliver to you.*