Logging In

1. Go to **support.perfectserve.com**.
2. Click **Sign in**. On the login screen, two options are available when logging in for the first time.
   - **Option 1** – Have you e-mailed PerfectServe Support before? If yes, you may already have an account in our system and need to select **Get a password**.
   - **Option 2** – If you are a new PerfectServe customer, or have never contacted our Support team, select **Sign up**.

3. Depending on the selected option, follow the instructions provided on the screen.

Self-Service

- Prior to contacting our Support team, we recommend searching our knowledge base for answers to your questions. Information is available for updating call schedules, utilizing the web and mobile applications, updating your practice greeting, patient assignments, and more.

- You can search in the search bar at the top of the page or click [Support] in the bottom right corner. The search bubble will help you locate exactly what you are looking for by asking clarifying questions if needed.

Chat With Us

- To chat with us, click [Chat] in the bottom right corner.
  - If our chat team is available, you will be connected with a live agent. If an agent is not available, you can leave an offline message that will be handled as soon as someone is available.

Submitting A Ticket

1. To submit a ticket, click **Submit a ticket** in the top bar.
2. Choose your request type and fill out necessary details.
   - You may add attachments such as error screenshots and call schedules.

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2

Managing Tickets

- To review your tickets choose "Your Tickets" from the homepage.
    - Locate requests that you have submitted under "My requests".
    - You can review tickets that you have been CC'd on under "Requests I'm CC'd on".
    - If applicable, you may also view tickets submitted within your organization under "Organization requests".
- Under any of the request tabs, you may sort by Open, Solved, Awaiting Your Reply, and Any.
- In the 🔍 Search requests bar, you can search for tickets by keywords, request type, or ticket number.

Managing Content

- You can provide comments and feedback on any article available in the customer portal. Track responses to your comments under **My Activities > Contributions**.

- For articles that are helpful and for quick reference, click the **Follow** button. Quickly reference all documents that you are following under **My Activities > Following**.