

Getting Started with the Orchestral Client Success Center

The purpose of this document is to provide the initial guidance and steps for getting started with the Orchestral Client Success Center (CSC.) This guide will walk through the initial creation of an account, resetting passwords, logging into the account. Furthermore, descriptions and examples of CSC usability features such as creating cases, creating video cases, viewing your documentation library and viewing trainings will be covered. The official link for the Orchestral CSC is support.orchestral.ai which can also be accessed via going to Orchestral.ai and clicking on the Support Banner.

FREE TRIAL



Orchestral.ai

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Creating an Account

1. Creating an account is a painless step for the Orchestral CSC, to start off head to <https://support.orchestral.ai> and click on the Sign Up button.
2. Please enter your First and Last name, followed by your email and a dedicated password for the Orchestral CSC.
 - a. Note: Enter your official work email address as that email will already be associated with your Orchestral Portal Account.
3. Once you have entered your information you will receive an email with your new Orchestral CSC Sign in information.
 - a. Note that your username will not be the email you provided

To access this page, you have to log in to Orchestral Support.

Username

Password

Log In

Remember me

[Forgot Your Password?](#)

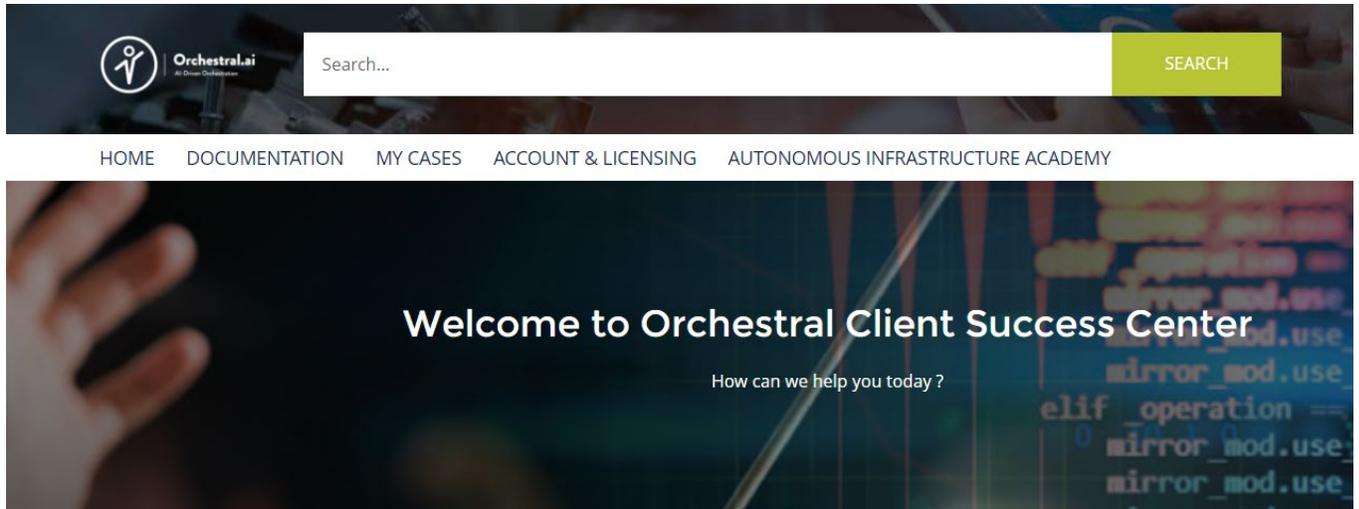
[Sign Up](#)

Resetting Password

Resetting your password is a simple task. Head to the <https://support.orchestral.ai/> and click on the Forgot Your Password? Link. Then enter your username, note that this is your Orchestral CSC username and note your company email address.

CSC Usability Features

Creating Case



- Upon entering in the CSC portal you will arrive on the Home screen. The home screen is where you can create your Support Tickets.

Nomenclature - Orchestral Support Tickets contain 4 required attributes of Subject, Type, Description and Priority

1. Subject – The subject line for the Case, this is effectively the Title of the case and is what it will be referenced to along case number in case reports.
2. Type – There are currently 4 types of cases that you can open, please select the type that most accurately describes your case.
 - a. Problem – Problems or bugs should go hear
 - b. Feature Request – Requests for additional features or requests for a future feature idea should go hear, these can then be prioritized and added to Orchestral’s roadmaps.
 - c. Question – Questions are different than problems, as questions can be open ended and more about strategy to solve an issue or just a simple question of how do I do x,y,z within an Orchestral Product.
 - d. Feature Enhancement – Feature Enhancements are there to encapsulate additional capabilities that you would like added to already existing features. These can then be prioritized and added to Orchestral’s roadmaps.
3. Description – Description is the body of the case. This is where you should write out your case details as well as provide any background information or code samples that would add context to the case.

4. Priority – Priority is initially assigned by you
 - a. Severity 1: Critical; being the highest priority and an immediate need
 - b. Severity 2: Major; being a high priority but not immediate need
 - c. Severity 3: Minor; being a low priority item with no immediate need
 - d. Severity 4: Cosmetic; being a generic inquiry, cosmetic issue or a possible feature request
5. Attachment – Attachments can be added to help add context to your case, whether it be adding additional information such as a log of an error, a picture, an example of code. Anything that you would think is beneficial for the advancement of the case.

Submitting the Case

ASK FOR SUPPORT

<p><small>SUBJECT</small></p> <input style="width: 90%;" type="text" value="Example Test Case"/>	<p><small>TYPE</small></p> <input style="width: 90%;" type="text" value="Question"/>
<p><small>DESCRIPTION</small></p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> <p>Details of the case to be filled out in detail here</p> </div>	<p><small>PRIORITY</small></p> <input style="width: 90%;" type="text" value="Severity Level 2"/>

License Start Date License Expiration Date

[Add Attachment](#)

SUBMIT

- Submitting the case is simple, give your attributes a once over and make sure everything is how you want it to be, and then click on the submit button

Documentation Library

HOME **DOCUMENTATION** MY CASES ACCOUNT & LICENSING AUTONOMOUS INFRASTRUCTURE ACADEMY

- The Documentation Banner is your source of Orchestral documents whether they be guides or attachments that have been added to your Support Tickets. Note that these are curated for your specific account so there are no privacy issues for any of your attachments.

My Cases

HOME DOCUMENTATION **MY CASES** ACCOUNT & LICENSING AUTONOMOUS INFRASTRUCTURE ACADEMY

- My Cases is your homepage for checking the status of your existing Support Cases. You can sort by any fields that you would like and you can also create new cases from this screen.

Account & Licensing

HOME DOCUMENTATION MY CASES **ACCOUNT & LICENSING** AUTONOMOUS INFRASTRUCTURE ACADEMY

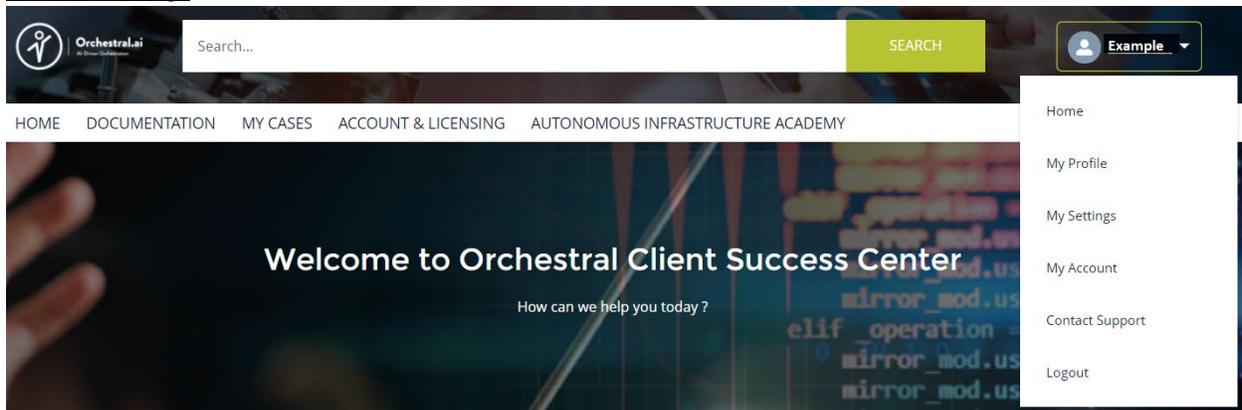
- Account & Licensing shows you any necessary information around your license information, subscription or trial duration along with (CHECK THIS, Can't see in Employee mode)

Autonomous Infrastructure Academy

HOME DOCUMENTATION MY CASES ACCOUNT & LICENSING **AUTONOMOUS INFRASTRUCTURE ACADEMY**

- The Autonomous Infrastructure Academy is where you can access Orchestral.ai provided trainings on our product offerings.
- Simply click on the training that you would like to participate in, and then click on the specific Learning Plan that you would like to start. Note that our CMS will keep track of progress you have made so feel free to close out and come back to your trainings as necessary.
- In the future we hope to include more high-level conceptual trainings around the power of Automation and Orchestration for your business to succeed.

Profile Settings



- The upper right hand of the Orchestral CSC provides a Profile Settings menu (PICTURE, with both the background being the profile settings and the top right being the settings menu) Here you can see 5 options
 1. Home – Back to the Home Screen
 2. My Profile – Here you can see and edit your profile and contact information along with being able to see your accounts Feed and any Cases or files you are associated with.
 3. My Settings – My Settings is where you can change your account details along with your notification settings for when you get notified about anything involving the CSC.
 4. Contact Support – Additional way to request Customer Support that is a less formal Support Case
 5. Logout – Logout of your account.

Contact Us

If you run into any problems or are unable to login to your account to create a case, or if you would like to ask Team Orchestral.ai any questions regarding this guide please feel free to reach out to support@orchestral.ai or submit a contact form on https://orchestral.ai. We look forward to hearing from you.