



Support Portal Migration – FAQs

What changes to expect?

On November 1st, 2021, PairSoft is transitioning their support case management to a new case management tool for all of our products (PaperSave, WorkPlace, Docupeak, and Automation for Gifts). You can expect the following changes to your support experience:

- One unified support portal for all PairSoft products, accessible with a single set of credentials, for both case management and knowledge base access.
- Simplified ticket creation forms tailored to capture the minimum but critical information.
- The format for case numbers will change, but existing tickets will be migrated with the current number as part of the Subject line, for quick reference.
- The ability to add multiple team members to each ticket.
- The ability to review or provide updates via email, post ticket creation.
- We will be no longer be creating tickets via direct emails.

Why is PairSoft transitioning to a new case management tool?

Pairsoft is dedicated to continuous improvement of support services, focusing on improving customer accessibility to our staff and knowledge base, fast end-to-end support services, and measuring our success. The PairSoft support portal is based on Freshdesk, Freshworks' modern helpdesk software, specially designed to help us deliver the best possible support experience to our customers.

When will these changes take effect?

We will transition to our new customer portal on November 1st, 2021.

Do I need to create an account on the new portal?

No, we are ensuring existing members will be provided with access to manage tickets in the new portal. You should expect an email containing activation instructions on November 1st.

Note: Reach out to us via 844-819-1208 and we will assist you in resolving all problems related to portal access.

How do I navigate through the PairSoft portal?

As part of your activation instructions email you will receive a detailed portal user guide.

Will this change the way I initiate support tickets for the product(s) I use?

All ticket creation will now take place through the support portal. In the portal you can easily submit new tickets, using a simplified form, check on your ticket(s) status, and be kept up to date on all the latest knowledge base articles PairSoft has to offer. To give you the best possible customer support, we

will be doing away with generating tickets by directly emailing or calling a support technician. We want to give you the best experience possible, and total visibility into the status of your ticket(s). Adding your ticket in the portal will help us keep you informed and turn around the ticket as quickly as possible.

Do I need to log into the portal every time I need to review or update a ticket?

While you do need to log into the portal to create a ticket, once a ticket has been created it will generate an email thread that can be used to receive or provide updates. All comments or messages on the email thread will be added to the ticket automatically.

What will happen with the tickets I have raised prior to November 1st?

In the new portal you should be able to review all tickets currently being worked, along with all tickets resolved within the last 12 months. Tickets that were closed before October 1st, 2020, will be archived and can be made available for auditing upon request.

Will users from my team be able to see my tickets in the new portal?

Yes. Depending on your preference we can either enable everyone from within your organization to have visibility over all cases or restrict visibility only to the ticket creator or anyone CC'd on the ticket.

How do I add a new support contact for our organization?

For security reasons, all new users that use the sign-up form will not be associated with an organization. Requests to link a new contact with your organization must be submitted by an existing organization member via a support ticket.

How do I get notified when there is an update to one of my tickets?

You will be sent an email for every update from PairSoft support. All updates will be added into the ticket email thread as well.

Will the new portal allow rich text formatting, inline images and attachments?

Yes. Rich text formatting is available when updating tickets in the portal. You can also add Inline images. Attachments must be no larger than 20MB per comment. If you have need to share larger files our Engineers will assist you with alternatives.

I received multiple activation emails, what do I do?

It may be that you are using a group email address with your current account. That will cause multiple people in your organization to receive the same activation invite, in addition to your personal invite. Please carefully review the activation email received, to clarify which account is your personal and which is a shared one.

Can partners submit tickets on behalf of their customers?

Yes, partners can specify the relevant organization when they are creating a new ticket. Partners will be able to submit tickets for all organizations they represent and will have the option to check all tickets in one view or filter by organization. If you want to include other people in the communication, simply add them to the CC field.