



# Spok Customer Portal User Guide



October 2021

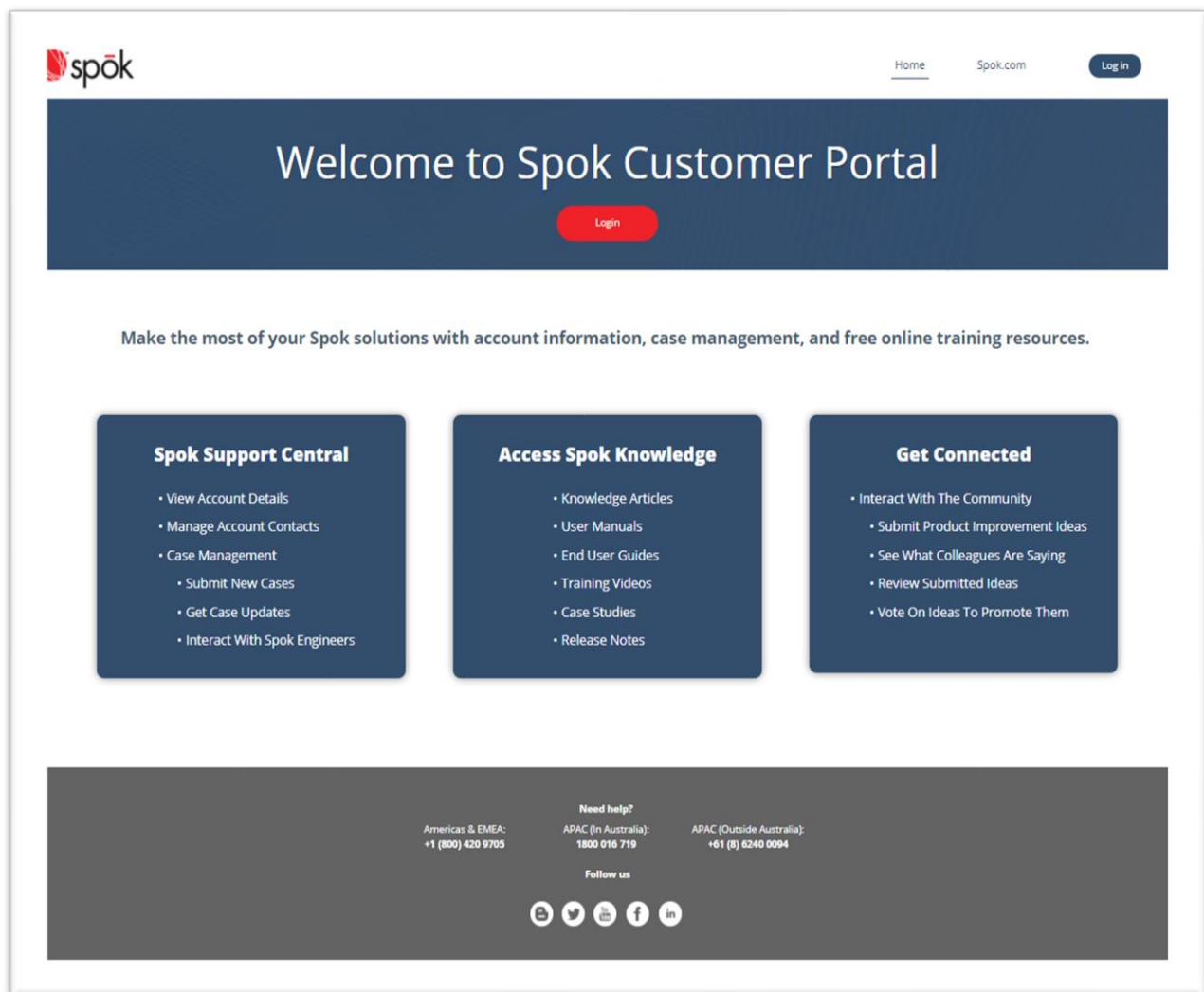
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## Overview

Prior to authenticating in to the Spok Customer Portal, the Home page will provide a high-level overview of the information available once logged in.

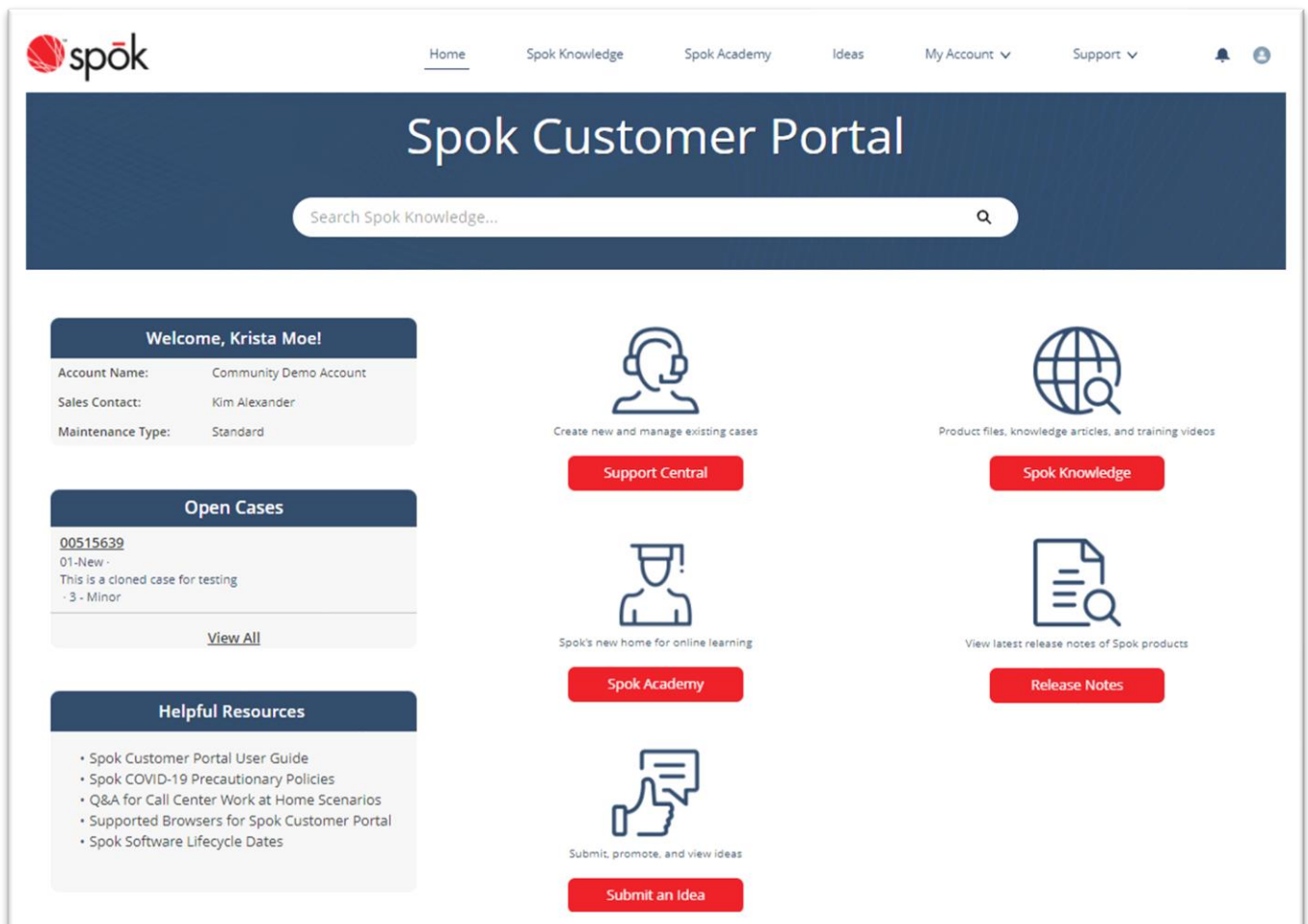
[www.spok.com/myspok](http://www.spok.com/myspok)



## Home Page

Once logged in (authenticated), the information displayed is specific to that user based on permissions set.

Within Spok's online Customer Portal, customers will find many helpful resources including:



This information is defaulted to the 'Primary Account' the user was created on.

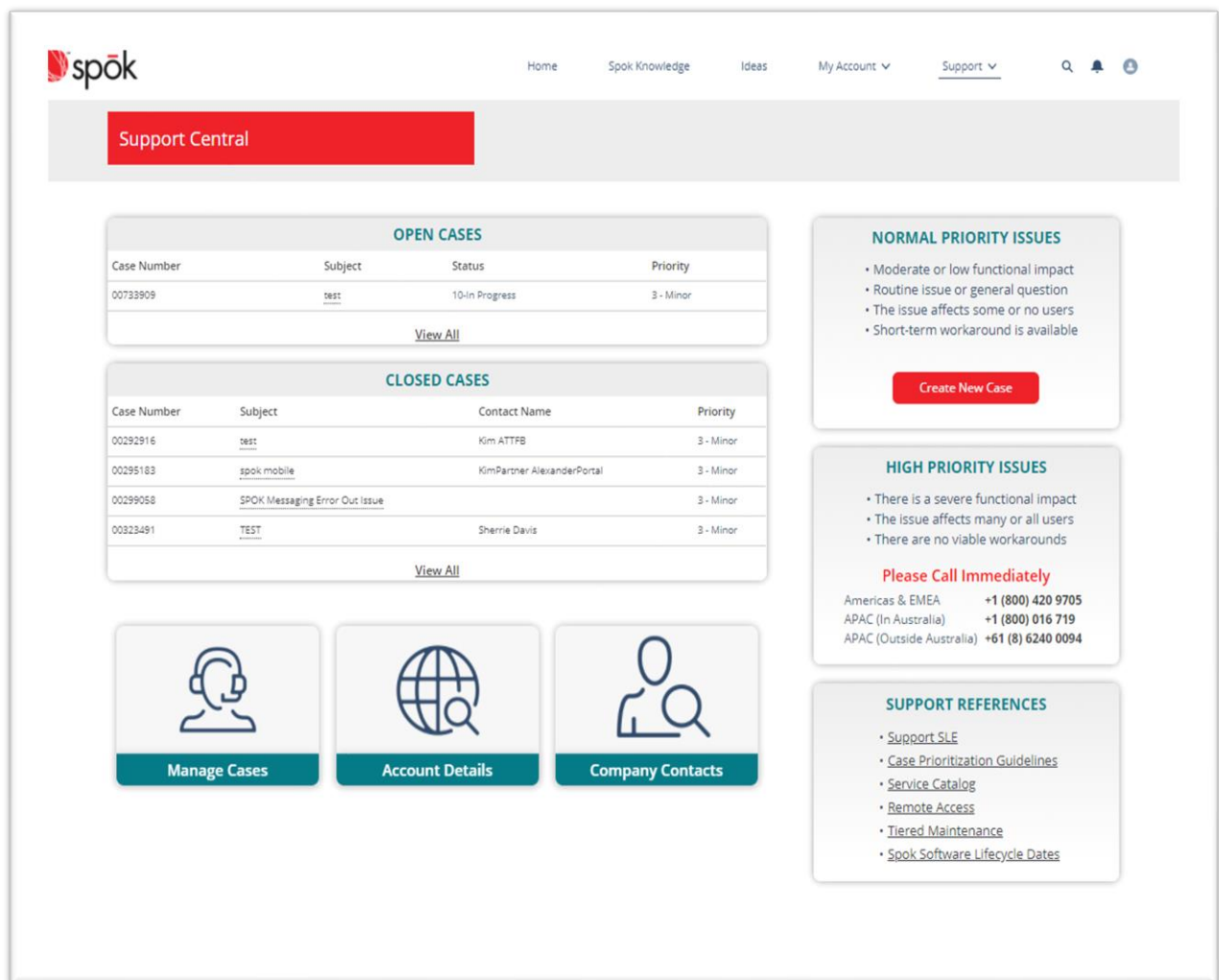
From the home page, access to key functional areas is available.

- Welcome (Customer Summary) – a few key pieces of information on the account and contact

- Open Cases – a quick view of the 3 open cases (based on sort setting in full “View All” list)
- Support Central – Support Cases, Account(s) detail, Contacts detail, etc.
- Spok Knowledge – access a vast repository of Spok product information
- Spok Academy – access to Spok’s online learning
- Release Notes – get the latest product release notes
- Ideas – submit and rate product ideas submitted by Spok customers

## Support Central

The hub into Spok Support to access Support Cases, Contacts and Account details.



The screenshot shows the Spok Support Central dashboard. At the top is a navigation bar with links for Home, Spok Knowledge, Ideas, My Account, and Support. Below the navigation bar is a red banner with the text "Support Central". The main content area is divided into several sections:

- OPEN CASES**: A table with columns for Case Number, Subject, Status, and Priority. It lists one case with Case Number 00733909, Subject test, Status 10-In Progress, and Priority 3 - Minor. A "View All" link is below the table.
- CLOSED CASES**: A table with columns for Case Number, Subject, Contact Name, and Priority. It lists four cases:
 

Case Number	Subject	Contact Name	Priority
00292916	test	Kim ATTFB	3 - Minor
00295183	spok mobile	KimPartner AlexanderPortal	3 - Minor
00299058	SPOK Messaging Error Out Issue		3 - Minor
00323491	TEST	Sherrie Davis	3 - Minor

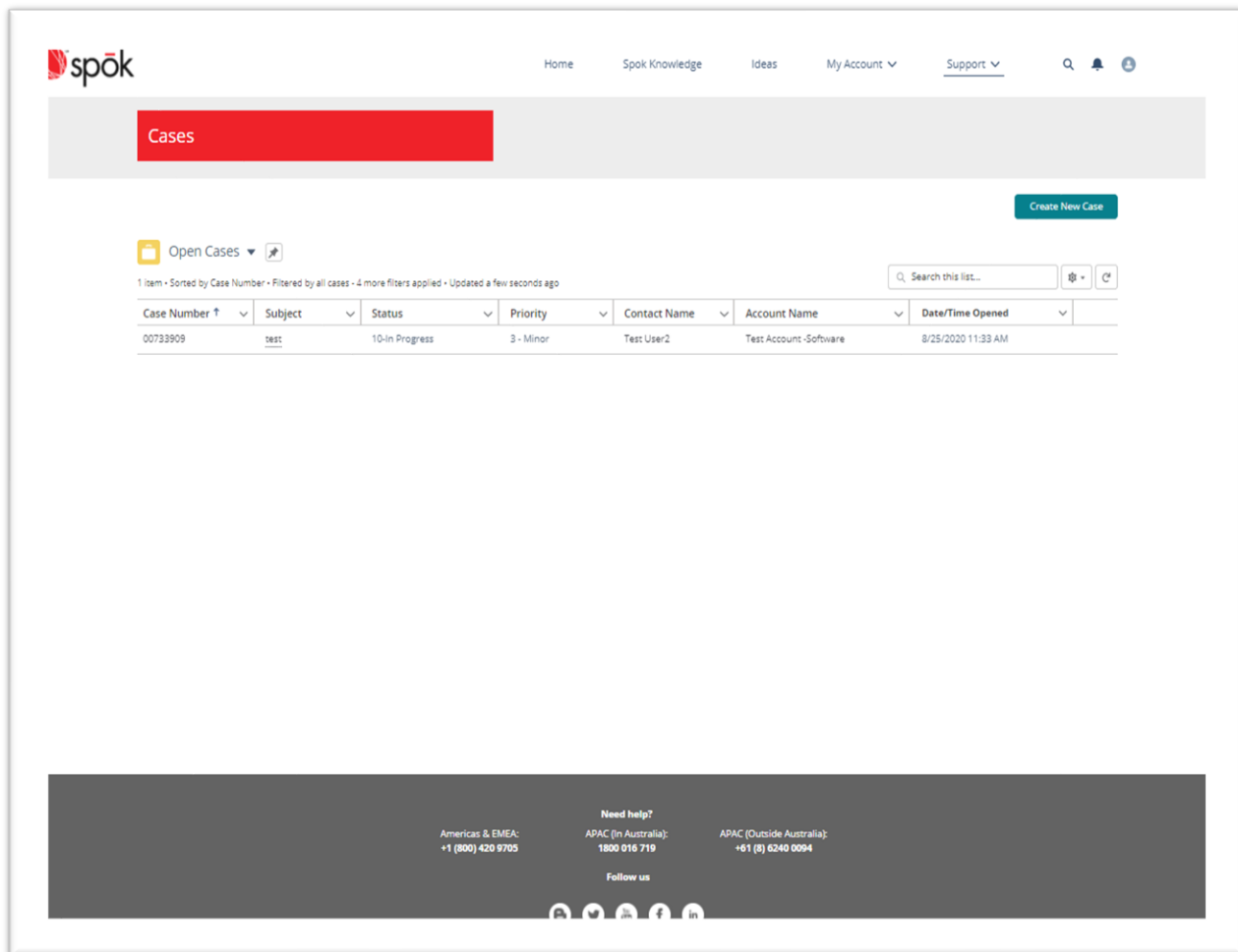
 A "View All" link is below the table.
- NORMAL PRIORITY ISSUES**: A section with a list of bullet points:
  - Moderate or low functional impact
  - Routine issue or general question
  - The issue affects some or no users
  - Short-term workaround is available
 A red "Create New Case" button is at the bottom.
- HIGH PRIORITY ISSUES**: A section with a list of bullet points:
  - There is a severe functional impact
  - The issue affects many or all users
  - There are no viable workarounds
 Below this is a red "Please Call Immediately" button, followed by contact information:
 

Americas & EMEA	+1 (800) 420 9705
APAC (In Australia)	+1 (800) 016 719
APAC (Outside Australia)	+61 (8) 6240 0094
- SUPPORT REFERENCES**: A section with a list of links:
  - [Support SLE](#)
  - [Case Prioritization Guidelines](#)
  - [Service Catalog](#)
  - [Remote Access](#)
  - [Tiered Maintenance](#)
  - [Spok Software Lifecycle Dates](#)
- Manage Cases**: A button with a headset icon.
- Account Details**: A button with a globe icon.
- Company Contacts**: A button with a person icon.

## Manage Cases

Accessing the 'Manage Cases' via list views allows for viewing of key pieces of case information by different sorting options without having to go into each case.

Also available is the ability to create a new case via the 'Create New Case button,' which will launch the new case wizard.

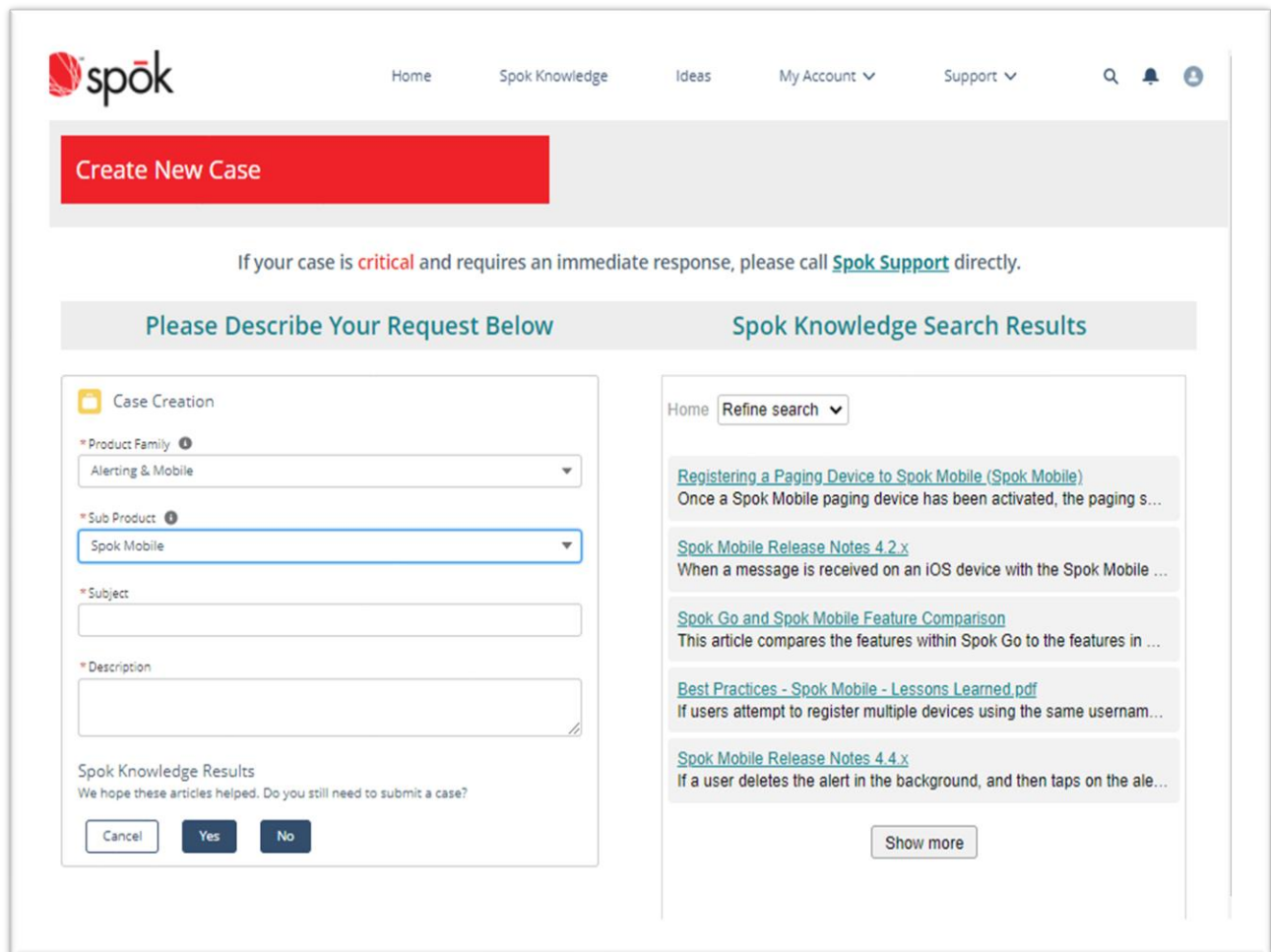


The screenshot shows the Spok 'Manage Cases' interface. At the top, there's a navigation bar with links for Home, Spok Knowledge, Ideas, My Account, and Support. A red 'Cases' button is prominent. Below it, a 'Create New Case' button is visible. The main section is titled 'Open Cases' and shows a list of cases. The list has columns for Case Number, Subject, Status, Priority, Contact Name, Account Name, and Date/Time Opened. A single case is listed with Case Number 00733909, Subject test, Status 10-In Progress, Priority 3 - Minor, Contact Name Test User2, Account Name Test Account -Software, and Date/Time Opened 8/25/2020 11:33 AM. The footer contains contact information for Americas & EMEA, APAC (In Australia), and APAC (Outside Australia), along with social media links.

Case Number ↑	Subject	Status	Priority	Contact Name	Account Name	Date/Time Opened
00733909	test	10-In Progress	3 - Minor	Test User2	Test Account -Software	8/25/2020 11:33 AM

## Create New Case

Follow an easy guide to create a case while providing key details to Spok Support about the issue assistance is needed on. This will also provide related Knowledge references to assist in self-service.



The screenshot shows the 'Create New Case' form on the Spok website. The form is divided into two main sections: 'Please Describe Your Request Below' and 'Spok Knowledge Search Results'.

**Please Describe Your Request Below**

**Case Creation**

- \* Product Family**: Alerting & Mobile
- \* Sub Product**: Spok Mobile
- \* Subject**: (Empty text field)
- \* Description**: (Empty text area)

**Spok Knowledge Results**

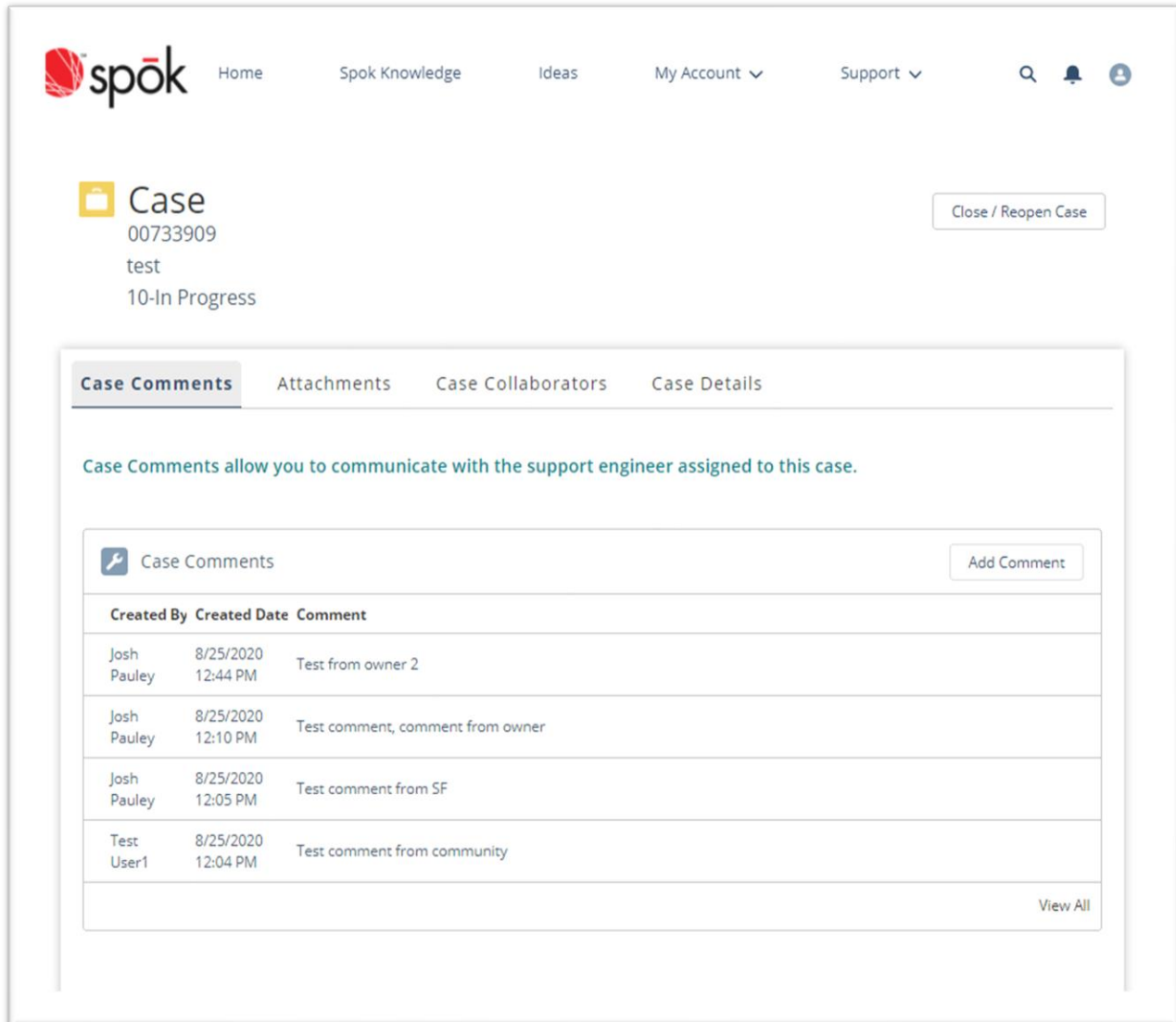
We hope these articles helped. Do you still need to submit a case?

**Spok Knowledge Search Results**

Home

- [Registering a Paging Device to Spok Mobile \(Spok Mobile\)](#)  
Once a Spok Mobile paging device has been activated, the paging s...
- [Spok Mobile Release Notes 4.2 x](#)  
When a message is received on an iOS device with the Spok Mobile ...
- [Spok Go and Spok Mobile Feature Comparison](#)  
This article compares the features within Spok Go to the features in ...
- [Best Practices - Spok Mobile - Lessons Learned.pdf](#)  
If users attempt to register multiple devices using the same usernam...
- [Spok Mobile Release Notes 4.4 x](#)  
If a user deletes the alert in the background, and then taps on the ale...

## Case Record



The screenshot shows the Spok Case Record interface. At the top, there is a navigation bar with the Spok logo, Home, Spok Knowledge, Ideas, My Account, and Support. Below the navigation bar, the case details are displayed: a yellow folder icon, the word "Case", the ID "00733909", the name "test", and the status "10-In Progress". A button labeled "Close / Reopen Case" is located to the right of the case details. Below the case details, there are four tabs: "Case Comments", "Attachments", "Case Collaborators", and "Case Details". The "Case Comments" tab is selected. Below the tabs, a message states: "Case Comments allow you to communicate with the support engineer assigned to this case." Below this message, there is a section titled "Case Comments" with an "Add Comment" button. Below the "Add Comment" button, there is a table with the following data:

Created By	Created Date	Comment
Josh Pauley	8/25/2020 12:44 PM	Test from owner 2
Josh Pauley	8/25/2020 12:10 PM	Test comment, comment from owner
Josh Pauley	8/25/2020 12:05 PM	Test comment from SF
Test User1	8/25/2020 12:04 PM	Test comment from community

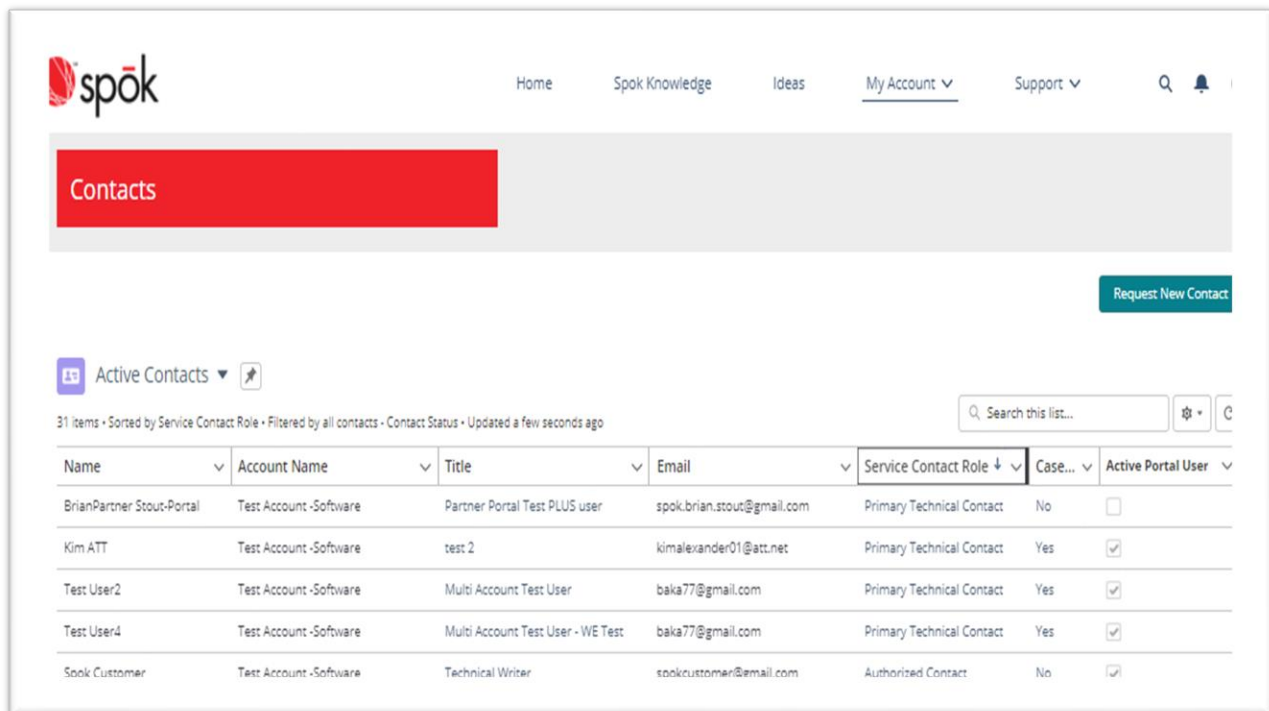
At the bottom right of the table, there is a link labeled "View All".

- Case Comments – send comments and view responses from Spok Support
- Attachments – add attachments to make available to Spok Support
- Case Collaborators – add additional contacts to receive case updates
- Case Details – details about the case
- Close/Reopen Case - use the button to close or reopen your case



## Company Contacts

The Company Contacts displays all active Support contacts for the Account. If there are Contacts from other Accounts within the organization, those Contacts will appear. These are known as Related Contacts and easily identified by the Account Name field in the view.



The screenshot shows the Spok web interface. At the top, there's a navigation bar with links: Home, Spok Knowledge, Ideas, My Account (selected), and Support. A search bar and a bell icon are also present. Below the navigation bar, there's a red banner with the word "Contacts". To the right of the banner is a button labeled "Request New Contact". Below the banner, there's a section titled "Active Contacts" with a dropdown arrow and a star icon. Below this, there's a summary line: "31 items • Sorted by Service Contact Role • Filtered by all contacts • Contact Status • Updated a few seconds ago". To the right of this line is a search bar labeled "Search this list..." and two icons: a gear and a refresh icon. Below the summary line is a table with the following columns: Name, Account Name, Title, Email, Service Contact Role, Case..., and Active Portal User. The table contains five rows of data.

Name	Account Name	Title	Email	Service Contact Role	Case...	Active Portal User
BrianPartner Stout-Portal	Test Account -Software	Partner Portal Test PLUS user	spok.brian.stout@gmail.com	Primary Technical Contact	No	<input type="checkbox"/>
Kim.ATT	Test Account -Software	test 2	kimalexander01@att.net	Primary Technical Contact	Yes	<input checked="" type="checkbox"/>
Test User2	Test Account -Software	Multi Account Test User	baka77@gmail.com	Primary Technical Contact	Yes	<input checked="" type="checkbox"/>
Test User4	Test Account -Software	Multi Account Test User - WE Test	baka77@gmail.com	Primary Technical Contact	Yes	<input checked="" type="checkbox"/>
Spok Customer	Test Account -Software	Technical Writer	spokcustomer@gmail.com	Authorized Contact	No	<input checked="" type="checkbox"/>

## Request New Contact Access

To request additional contacts use the 'Request New Contact' button and follow the screens to submit the request to Spok Support.

### What kind of access does this contact require?

- **Community Portal Access**
  - Case Management
  - Spok Knowledge
  - View Contacts & Accounts
- **Knowledge Access Only**
  - Spok Knowledge
  - No Portal Access
- **No Access**
  - Typically a Sales Contact

**\* New Contact Access**

☐ Community Portal Access

☐ Knowledge Access Only

☐ No Access

Next

### New Contact Details

**\* First Name**

**\* Last Name**

**\* Title**

**\* Email Address**

**\* Business Phone Number**

Mobile Phone Number

Previous Next

### Contact Access

**\* Primary Account Name**

**\* Service Contact Role**

☐ Authorized Contact

☐ Primary Technical Contact

**\* Case Collaborator**

☐ No

☐ Yes

**Do you need to add any Related Accounts for this contact?**

- Extends access to account details, contacts and cases for additional accounts
- Set Service Contact Role & Case Collaborator independently for each related account
- You can only select related accounts to which you already have access
- If you don't have access to a Related Account, please select No & indicate the related account in the Additional Comments section after pressing Next

**\* Add Related Account?**

☐ Yes

☐ No

Previous Next

## Request Contact Update or Deactivation

To request contact details be updated or deactivate a contact, please use the 'Update Contact' button on the individual contact record.

Contact

Spok Customer

Update Contact

▼ Contact Information

Name

Spok Customer

Title

Technical Writer

Account Name

Test Account -Software

Email

spokcustomer@gmail.com

Phone

(952) 000-0000

Mobile

▼ Access Information

Service Contact Role

Authorized Contact

Case Collaborator

No

Contact Status

Active

Active Portal User

☒

Update Contact

What kind of update do you need to make for this contact?

\* Action to take:

☐ Update this contact with new information

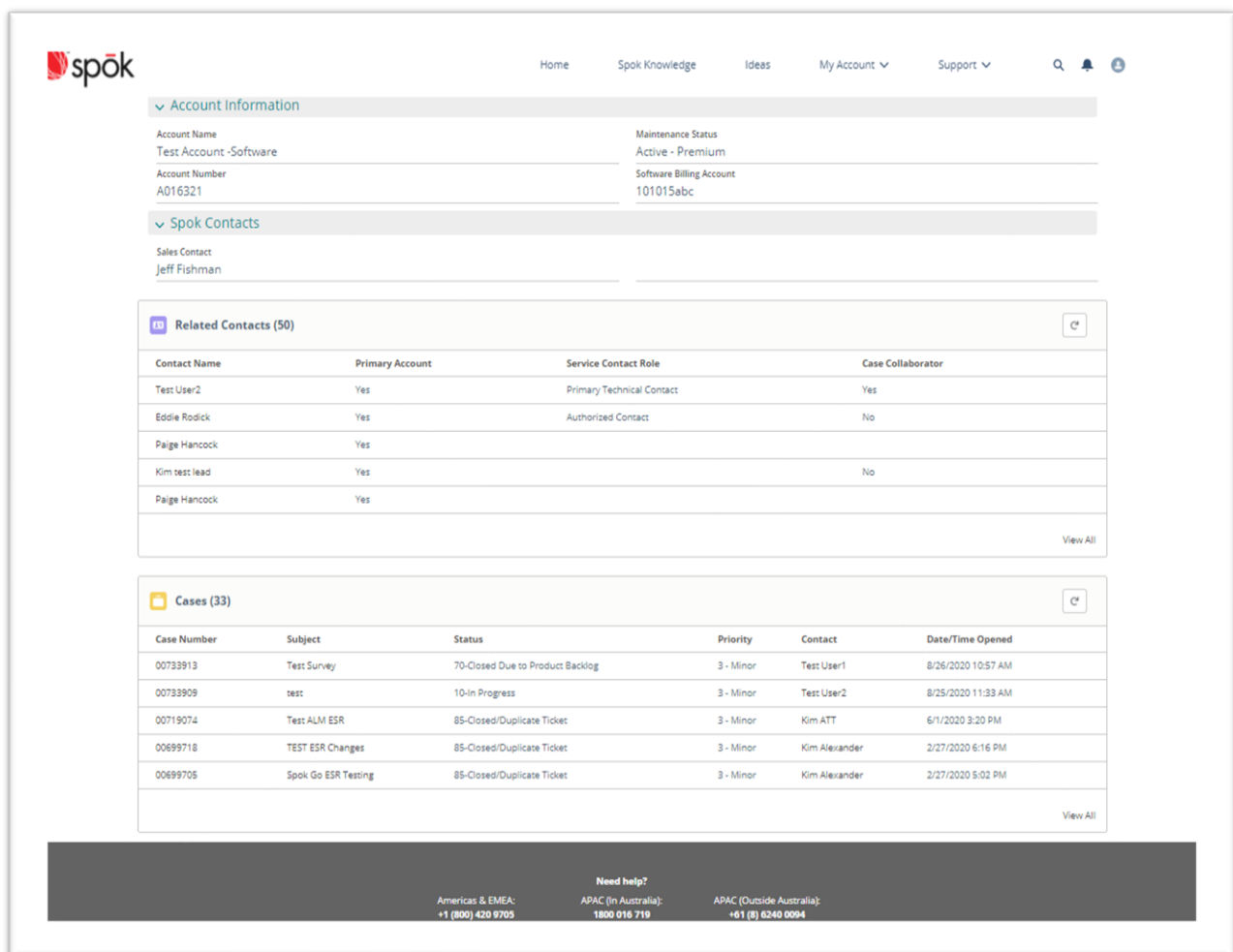
☐ Deactivate this contact (remove access to portal)

Next

## Account Details

Account Information will be displayed as a brief overview of key pieces of Spok information, Contacts and Cases.

If there are multiple Accounts within the organization, you will have to select the account to see the information.



The screenshot shows the Spok Account Details page. The top navigation bar includes links for Home, Spok Knowledge, Ideas, My Account, and Support, along with search, notification, and user icons. The main content area is divided into three sections: Account Information, Spok Contacts, and Cases.

**Account Information**

Account Name	Maintenance Status
Test Account - Software	Active - Premium
Account Number	Software Billing Account
A016321	101015abc

**Spok Contacts**

Sales Contact: Jeff Fishman

**Related Contacts (50)**


Contact Name	Primary Account	Service Contact Role	Case Collaborator
Test User2	Yes	Primary Technical Contact	Yes
Eddie Rodick	Yes	Authorized Contact	No
Paige Hancock	Yes		
Kim test lead	Yes		No
Paige Hancock	Yes		

**Cases (33)**

Case Number	Subject	Status	Priority	Contact	Date/Time Opened
00733913	Test Survey	70-Closed Due to Product Backlog	3 - Minor	Test User1	8/26/2020 10:57 AM
00733909	test	10-In Progress	3 - Minor	Test User2	8/25/2020 11:33 AM
00719074	Test ALM ESR	85-Closed/Duplicate Ticket	3 - Minor	Kim ATT	6/1/2020 3:20 PM
00699718	TEST ESR Changes	85-Closed/Duplicate Ticket	3 - Minor	Kim Alexander	2/27/2020 6:16 PM
00699705	Spok Go ESR Testing	85-Closed/Duplicate Ticket	3 - Minor	Kim Alexander	2/27/2020 5:02 PM

**Need help?**

Americas & EMEA: +1 (800) 420 9705	APAC (In Australia): 1800 016 719	APAC (Outside Australia): +61 (8) 6240 0094
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HomeSpok KnowledgeIdeasMy AccountSupport

Accounts

My Company Accounts

3 items • Sorted by Account Name • Filtered by all accounts • Updated a few seconds ago

Account Name

Account Number

Maintenance Status






MA TEST - KIM ALEXANDER	A039744	Active - Standard
Test Account - Upload Test ONLY	A052507	Active - Standard
Test Account - Software	A016321	Active - Premium

Americas & EMEA:  
+1 (800) 420 9705

Need help?  
APAC (In Australia):  
1800 016 719

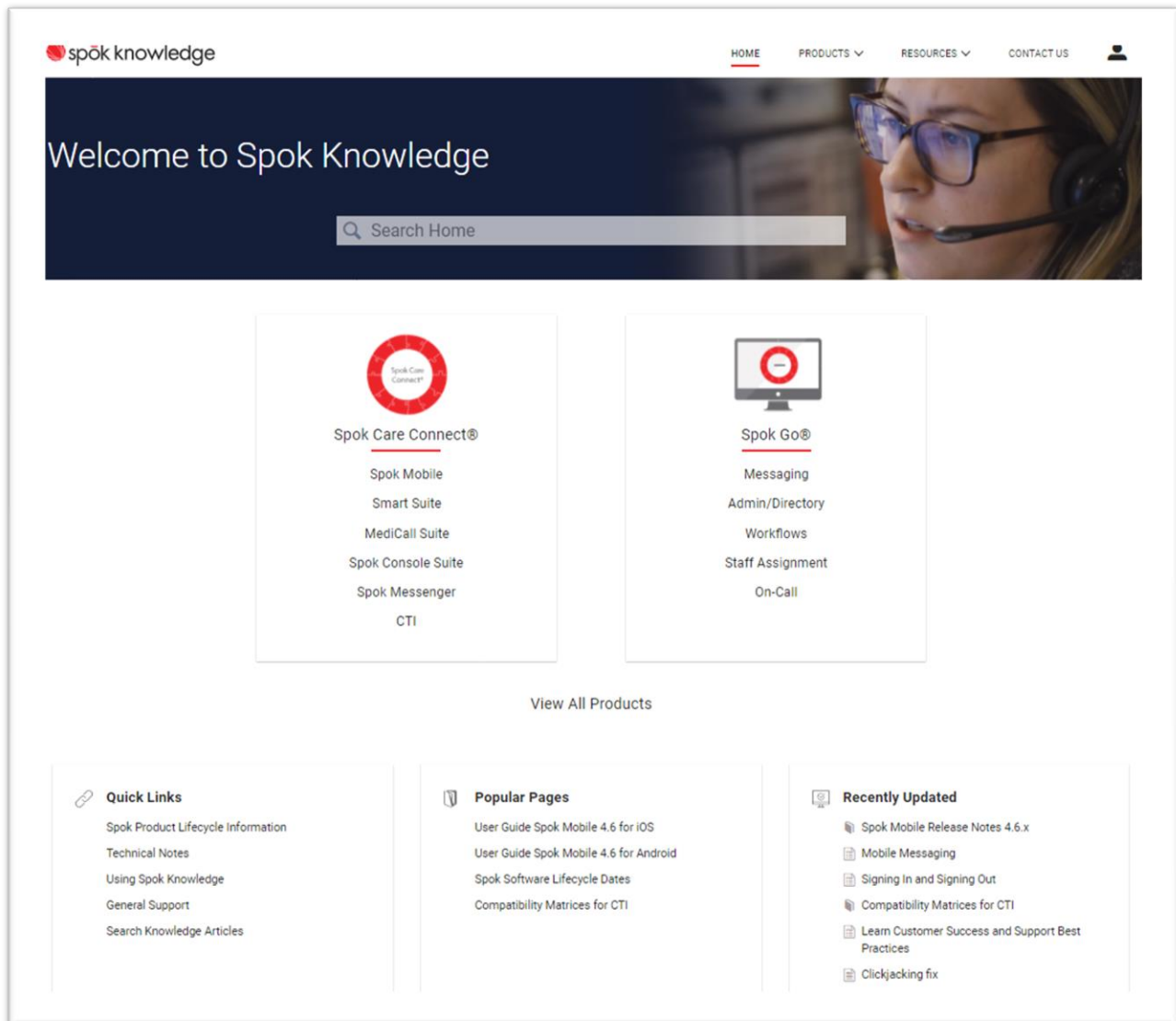
APAC (Outside Australia):  
+61 (8) 6240 0064

Follow us



## Spok Knowledge

Browse Spok product information, knowledge articles, training videos.



The screenshot shows the Spok Knowledge website interface. At the top, there is a navigation bar with links for HOME, PRODUCTS, RESOURCES, and CONTACT US, along with a user profile icon. The main header features the text "Welcome to Spok Knowledge" and a search bar labeled "Search Home". Below the header, there are two main product categories: "Spok Care Connect®" and "Spok Go®".

**Spok Care Connect®**

- Spok Mobile
- Smart Suite
- MediCall Suite
- Spok Console Suite
- Spok Messenger
- CTI

**Spok Go®**

- Messaging
- Admin/Directory
- Workflows
- Staff Assignment
- On-Call

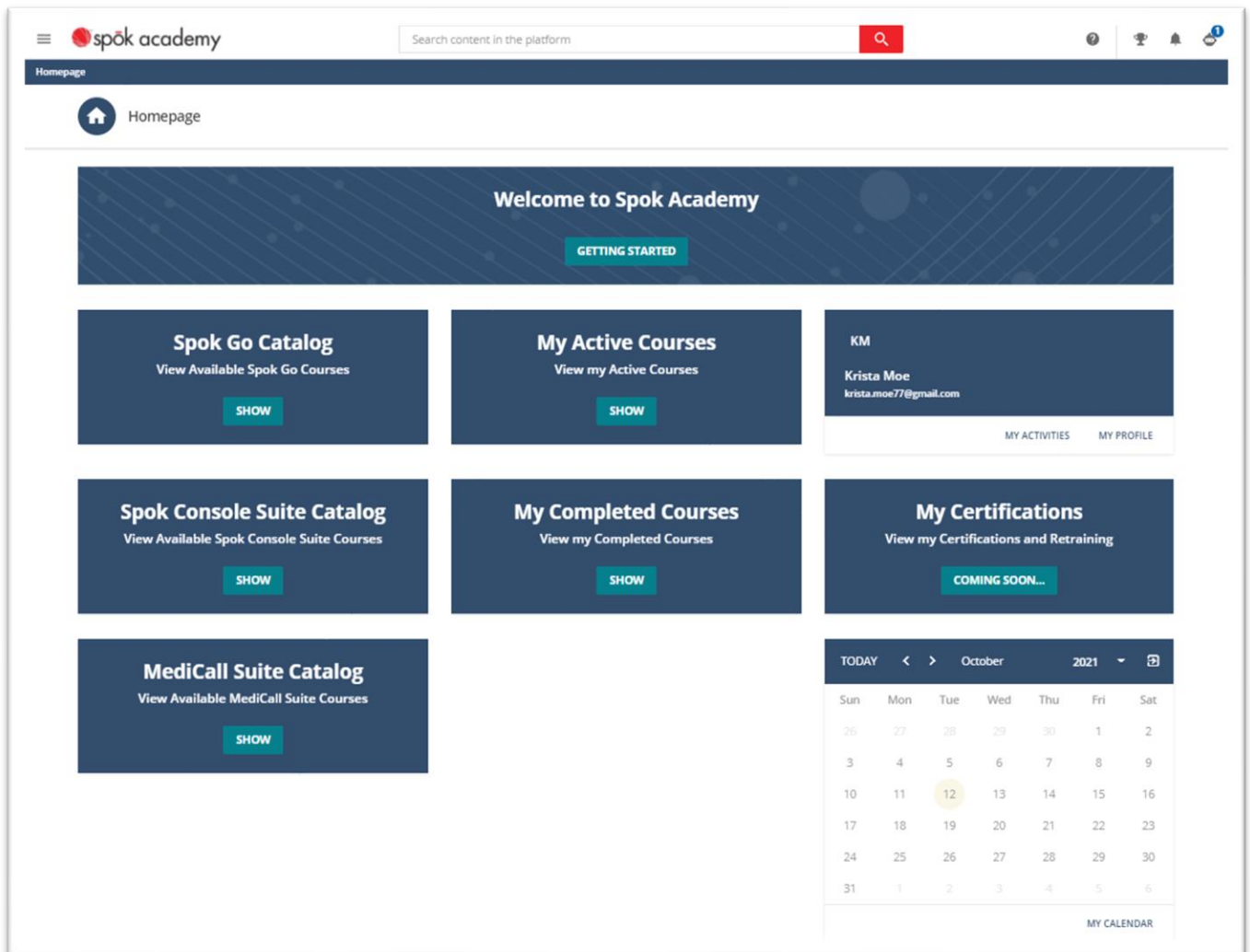
Below these categories is a link to "View All Products".

The bottom section of the page is divided into three columns:

- Quick Links**
  - Spok Product Lifecycle Information
  - Technical Notes
  - Using Spok Knowledge
  - General Support
  - Search Knowledge Articles
- Popular Pages**
  - User Guide Spok Mobile 4.6 for iOS
  - User Guide Spok Mobile 4.6 for Android
  - Spok Software Lifecycle Dates
  - Compatibility Matrices for CTI
- Recently Updated**
  - Spok Mobile Release Notes 4.6.x
  - Mobile Messaging
  - Signing In and Signing Out
  - Compatibility Matrices for CTI
  - Learn Customer Success and Support Best Practices
  - Clickjacking fix

## Spok Academy

Review and enhance your Spok product knowledge through online learning.



The screenshot shows the Spok Academy homepage. At the top, there is a navigation bar with the Spok Academy logo, a search bar, and user icons. Below the navigation bar, a "Homepage" button is visible. The main content area features a "Welcome to Spok Academy" banner with a "GETTING STARTED" button. Below the banner, there are several course catalog and user activity sections:

- Spok Go Catalog**: View Available Spok Go Courses. A "SHOW" button is present.
- My Active Courses**: View my Active Courses. A "SHOW" button is present.
- Spok Console Suite Catalog**: View Available Spok Console Suite Courses. A "SHOW" button is present.
- My Completed Courses**: View my Completed Courses. A "SHOW" button is present.
- My Certifications**: View my Certifications and Retraining. A "COMING SOON..." button is present.
- MediCall Suite Catalog**: View Available MediCall Suite Courses. A "SHOW" button is present.


On the right side, there is a user profile section for "KM" (Krista Moe, krista.moe77@gmail.com) with links for "MY ACTIVITIES" and "MY PROFILE". Below this is a calendar for October 2021, showing dates from 26 to 31. The calendar is labeled "MY CALENDAR".



## Ideas

Submit product improvement ideas for consideration by Spok's product strategy team. Vote on ideas suggested by other Spok customers.





[Home](#)
[Spok Knowledge](#)
[Ideas](#)
[My Account](#)
[Support](#)

Ideas

[Post Your Ideas](#)
[Vote to Promote](#)
[Add Comments](#)

Add a new idea

Recent

Trending

Popular

My ideas6

My votes8

My subscriptions9

Filter by status

Already exists0

Will not implement0

Planned1

Shipped0

Filter by category

Professional Services Group5

Spok Care Connect6

CTI0

MediCall Suite0

Smart Suite0

Spok Console Suite0

Spok Messenger0

Spok Mobile0

Spok Go14

Test User1

7

VOTED

Test multiple workspaces to one portal - CCS

Testing only

Created 24 Aug 16:47

Spok Care Connect

1

4

VOTE

Testing multiple workspaces in portal - Other

Testing only

Created 24 Aug 16:51

Professional Services Group

0

3

VOTED

asdf

asdf

Created 27 Aug 19:55

Spok Care Connect

0

3

VOTE

Test Idea for Smart Suite

requesting a new idea

Created 25 Aug 13:07

Spok Care Connect

1

2

VOTED

Test JP

Test

Created 28 Aug 21:25 by you

Spok Care Connect

0

Test Aha