



*JUST A CLICK  
TO YOUR SUCCESS!*

# **Click2Sell**

## **Affiliate Guide v.1.1**

# Table of Contents

<b>Click2Sell.....</b>	<b>1</b>
<b>Affiliate Guide v.1.1.....</b>	<b>1</b>
<b><u>1 Introduction.....</u></b>	<b><u>3</u></b>
1.1 System Overview.....	3
1.2 Guide Structure.....	3
<b><u>2 Getting Started.....</u></b>	<b><u>4</u></b>
2.1 Registering.....	4
2.2 Logging In and Out.....	4
<b><u>3 Affiliate Area.....</u></b>	<b><u>5</u></b>
3.1 Promoting Products.....	5
3.2 Managing Affiliated Products.....	5
<b><u>4 Managing Your Settings.....</u></b>	<b><u>6</u></b>
4.1 Editing Profile Details.....	6
4.2 Payment Processor Settings.....	6
4.2.1 Managing Payment Accounts.....	6
4.2.2 Mapping Payment Processor Accounts.....	7
4.3 Editing Credit Card Settings.....	8
<b><u>5 Managing Payments.....</u></b>	<b><u>9</u></b>
5.1 Making a Single Payment.....	9
5.2 Making Multiple Payments.....	9
5.3 Tracking History of Payment.....	10
<b><u>6 Marketplace.....</u></b>	<b><u>11</u></b>
6.1 Searching for Products.....	11
6.2 Viewing Products.....	11
6.3 Promoting Products.....	12
<b><u>7 Reporting.....</u></b>	<b><u>13</u></b>
<b><u>8 Promoting Click2Sell.....</u></b>	<b><u>18</u></b>
8.1 Viewing Click2Sell Promotion Policies.....	18
8.2 Viewing Referred Members.....	18
<b><u>9 Customer Support.....</u></b>	<b><u>19</u></b>
9.1 Contacting Click2Sell.....	19
9.2 Searching for Answers in Frequently Asked Questions.....	19
9.3 Managing Help Desk Requests.....	19
9.3.1 Help Request Flow.....	20
9.3.2 Request Handling Procedures.....	20

# 1 Introduction

The purpose of this guide is to help affiliates use all capacities of the Click2Sell system effectively. It provides a description of most typical tasks illustrating how to create promotional campaigns, make payments, and perform other common activities.

## 1.1 System Overview

Click2Sell is a payment gateway and a marketplace that allows electronic products developers/sellers to sell and promote their products to customers. Also, it is an affiliate system that enables affiliates to promote products and earn commissions on transactions.

After you enter the system as an affiliate, access the following sections using the top menu links: **For Affiliate**, **Payments**, **Reports**, **Marketplace**, **My Profile**, **Promote Click2Sell**, and **Customer Support**. Each of the sections contains subsections dedicated to specific functionalities. The section you select is highlighted in green and the selected subsection is underlined.

## 1.2 Guide Structure

The Click2Sell user guide is based on the user interface layout and consists of nine chapters including:

[Introduction](#) provides a brief overview of the Click2Sell system.

[Getting Started](#) describes the initial steps you should take to be able to work in the Click2Sell system.

[Affiliate Area](#) explains how to view products available in the marketplace, select them for promotion, and manage affiliated products.

[Managing Your Settings](#) shows how to edit your profile details, make payment settings, and edit credit card details.

[Managing Payments](#) outlines payment system features and explains how to make payments and manage payment processor accounts.

[Marketplace](#) shows how to search for, view, and promote products available in the Click2Sell marketplace area.

[Reporting](#) discusses the types of statistics reports that enable you to review your own data and analyze performance of affiliates and referring sources.

[Promoting Click2Sell](#) outlines the promotion policies you should take into account and explains how to track performance of the users you referred to the system.

[Customer Support](#) illustrates in what way you can receive assistance from the Click2Sell support staff.

## 2 Getting Started

To be able to operate in the Click2Sell system, you must sign up as an affiliate and log in.

### 2.1 Registering

To register

1. Click **Sign Up** at the top of the Click2Sell start page. A sign-up form appears. *Note.* Alternatively, you can access the sign-up form from the **Affiliates** section by selecting the **Sign Up** link on the top menu.
2. Fill out the form. *Note.* All fields marked with an asterisk are mandatory.
  - a. Provide a login name, password, and password confirmation.
  - b. Enter the required personal information.
  - c. Specify your payment preferences.
  - d. If you wish, subscribe to news and notifications from the system.
  - e. View the affiliate agreement and accept the terms and conditions offered by Click2Sell.
  - f. Enter the confirmation symbols.
3. Click **Sign Up Now!**

After you have filled in and submitted the form, the system displays a success page, and you can enter the members' area using your login name and password.

### 2.2 Logging In and Out

The Click2Sell web site is a password protected area. You can access it from the Login page.

#### To log in

1. Enter valid credentials in the **Login** and **Password** fields.

Details

Login  \*

Password  \*

[Forgot your password?](#)

\* - required fields

2. Click **Submit**.

#### To log out

To log out, click the cross  or the **Logout** link in the top right corner of the page.

## 3 Affiliate Area

To access affiliate-specific activities, go to the **For Affiliate** section.

In the affiliate area you can do the following:

- ❑ Search for marketplace products
- ❑ View product details
- ❑ Select products for promotion and manage promotional campaigns
- ❑ Manage affiliated products

### 3.1 Promoting Products

To promote products through Click2Sell, use the **Promote Products** subsection. There you can select a product for promotion by clicking **Promote** in the product table.

*Note.* Promotion of some products may require approval of the merchant. If this is the case, the system will notify you by displaying the appropriate message. Further you can find out if the approval is granted by tracking the status of the selected product in the **Affiliated Products** subsection. If a product is available for promotion, its status is set to **Enabled**.

Refer to the [Marketplace](#) section for details on searching products, viewing product details, and managing promotional campaigns.

### 3.2 Managing Affiliated Products

The products you selected for promotion are accessible in the **Affiliated Products** subsection.

The initial page of the subsection displays a complete list of your affiliated products with their names, descriptions, types, cost, and status. Here you can also find commissions payable to you on each product sale.

The activities you can perform in the subsection include:

- ❑ Creating, viewing, and deleting promotional campaigns for affiliated products.  
To access affiliated product campaigns, click the required product record. For details on campaign management, see [Promoting Products](#).
- ❑ Removing affiliated products from the list.  
To delete an affiliated product, click **Remove** in the appropriate product record.

## 4 Managing Your Settings

To manage your settings, go to the **My Profile** section where you can do the following:

- Update your profile
- Make payment settings
- Edit credit card details

### 4.1 Editing Profile Details

The **Account Information** subsection enables you to modify your profile details.

To update your profile, make necessary changes in your personal, account, and payment information, and click **Save**.

On the profile editing page, you can also:

- Subscribe to news bulletins from Click2Sell by selecting **I would like to receive periodic news from Click2Sell**; to unsubscribe, uncheck the box.
- Choose commission payment methods by selecting the check boxes next to the payment providers.

To discard all changes, click **Reset**.

### 4.2 Payment Processor Settings

Click2Sell allows transactions through accounts of the following online payment processors:

- WorldPay
- Authorize.Net
- PayPal
- Google Checkout
- Moneybookers

In the **System Payment Processors** subsection you can

- Create, update, and delete accounts
- Map payment accounts

#### 4.2.1 Managing Payment Accounts

To enable transactions via the online payment providers, first create an account.

To create an account

1. Select a payment processor from the drop-down list at the bottom of the My Payment Processors page and click **Create**.
2. Enter the required parameters in the account form that shows.

**Account form**

Name  \*

WorldPay ID  \*

Auth Password  \*

-----

\* - required fields

3. Click **Save**.

To edit an account, select the required record in the accounts table, edit the fields of the account form, and click **Save**.

To remove an account from the system, click **Delete** in the account form.

*Note.* No transaction is possible until you map an account to a payment processor.

#### 4.2.2 Mapping Payment Processor Accounts

You can map existing accounts to payment processors, i.e. determine which of the available accounts will be used for payments.

To map accounts

1. Click the **Setup** button at the top of the My Payment Processors page. The My Payment Processors Mapping form opens.

*Note.* 'Credit Card' in the list of payment processors denotes Visa or MasterCard.

2. In the drop-down lists select accounts as necessary.

**Mapping form**

PayPal  ▼

Google Checkout  ▼

Credit card  ▼

StormPay  ▼

*Note.* The following restrictions apply when you select accounts:

- For credit card payments you can select WorldPay and Authorize.Net accounts. Also, you can select PayPal accounts, but only for U.S. cardholders.
- For PayPal you can select only a PayPal account.
- For Google Checkout you can select only a Google Checkout account.
- For StormPay you can select only a StormPay account.

3. Click **Save**.

### 4.3 Editing Credit Card Settings

You can modify your credit card details, including the cardholder's name, card number, validity period, and code.

To change credit card data

1. Go to the **Credit Card Settings** subsection.
2. Make any necessary changes in the card settings form that appears.

#### Card Settings

Cardholder	<input type="text" value="Carl Johnson"/>	*
Card Number	<input type="text" value="3566002020360505"/>	*
Expiration Date	<input type="text" value="04"/> / <input type="text" value="13"/>	*
Digit Code	<input type="text" value="191"/>	*

.....

\* - required fields

3. Click **Update**.



## 5 Managing Payments

In the **Payments** section, you can pay commissions, track your settlements, and view payment history.

Selecting **Payments** on the top menu, you get to the **Make Payments** subsection.

The initial page of the subsection displays a list of your incoming and outgoing settlements for the selected month with payment amounts, currencies, names of payers or payees, and pay direction. **OUT** in the Pay Direction column stands for outgoing settlements, and **IN** denotes incoming settlements.

Member	Amount to Pay	Currency	Pay Direction	Paid	Pay
James Silver	28.00	USD	IN	<input type="checkbox"/>	
<b>Transaction ID</b>	<b>Amount to Pay</b>	<b>Date</b>	<b>Type</b>		
645	\$ 28.00	2007-09-26	Sale		
Julia Goldberg	28.00	USD	IN	<input type="checkbox"/>	

By clicking the plus sign next to an affiliate name, you can access details of the related transaction: transaction ID, date, type, and amount.

Settlements can be filtered by pay period (month), transaction type (you can view paid, not paid, or all transactions), and affiliate.

**Filter**

Select Pay Period May-2007

Show

Pay to Affiliate

### 5.1 Making a Single Payment

To make a payment

1. Click the **Pay** button in the appropriate settlement entry. The settlement details page opens providing settlement information and details of the related transaction.
2. On the payment details page, select one of the available payment methods and click **Pay**.
3. Follow the procedures relevant to the selected mode of payment.

If the payment is successful, the system checks the corresponding box in the Paid column.

*Note.* Using the **Pay** button, you make all payments due in the selected period.

### 5.2 Making Multiple Payments

If you use a PayPal or Moneybookers account, you can pay commissions to a group of payees by clicking **Mass Payment** under the settlements list.

*Note.* The following restrictions apply to mass payment:

You can send multiple payments instantly to any number of affiliates, only if you have a Premier or Business account. Personal Paypal users need to upgrade their account to Premier or Business (it's free, just some changes have to be done in your Paypal account's options).

[Click here](#) to read PayPal instructions how to upgrade PP account.

### 5.3 Tracking History of Payment

To view past commission payments, go to the **Payments History** subsection. The payment history page displays the details of each transaction including ID, date and time of the transaction, name of affiliate who received the payment, amount of payment, currency of payment, and name of the processor used to make the payment.

#### PAYMENT HISTORY

My payments

**History Filter**

Select Statistic Period July-2007 

[Show](#)

#### Transactions

Showing 1 transactions

Date	Time	Affiliate	Amount	Processor	Status
2007-07-17	04:04:21	SYSTEM	\$ 22.00	CARD	Successfully paid

## 6 Marketplace

In the **Marketplace** section you can do the following:

- ❑ Make a search for a specific product
- ❑ View product details
- ❑ Select products for promotion and manage promotional campaigns

### 6.1 Searching for Products

You can search the marketplace for products by applying a search filter or browsing the categories.

The marketplace filter allows you to enter a search term or select a category. You can sort results by product rank, revenue, commissions per sale, etc., and determine the number of results per page.

**Marketplace search**

Search

Category  ▼

Sort by  ▼

Results per page  ▼

You can also select the categories below the search filter to view products available within each category.

The search results are displayed in the table showing product ranks, names, prices, commissions, and conversion rates.

### 6.2 Viewing Products

To see the details of a product, click **More Info** in the corresponding row of the product table.

On the product details page, you can:

- ❑ View product and merchant details, including a short description of the product, the merchant's name and rank, payment type preferred by the merchant, product placement date, and commissions offered per successful sale in percent and currency.
- ❑ Contact the product merchant by clicking the merchant's name.
- ❑ View product statistics.

Refund %:	<b>14.00%</b>
Affiliate Sales %:	<b>28.00%</b>
Popularity:	<b>0</b>

**Refund %** calculates the ratio of refunds to sales. The statistic is displayed after five successful sales.

**Affiliate Sales %** calculates the percentage of sales made through affiliates.

**Popularity** shows how popular the product is among affiliates. The statistic is based on the number of affiliates who selected to promote the product.

- ❑ Create a promotion campaign for the product by clicking **Create affiliate link**.
- ❑ Access promotion tools offered by the merchant by clicking the tool name.
- ❑ View all marketplace categories where the product is available.

Marketplace Categories	Rank	Last Week	Change	History
Subscriptions : E-books	3	--	0	<a href="#">View</a>
Download : Music	6	--	0	<a href="#">View</a>

The category list displays the current and last week’s ranks of the product in each of these categories and shows how the product rank has changed since last week.

To trace the product performance since it was added in the category, click **View** in the History column.

### 6.3 Promoting Products

To select a product for promotion, click **Promote** in the product table. The promotional campaign page opens, where you can:

- ❑ Use a default promotional campaign created by the merchant for the product you have selected.

Campaign	Views	Visitors	Sales	Refunds	Conv.Rate	Refund Rate	Profit		
Default Campaign	75	72	2	0	2.78 %	0.00 %	56.00	<a href="#">Get Link</a>	<a href="#">Delete</a>

To view promotion tools provided for the product, select the **View Tools** link.

- ❑ Create a new promotional campaign

To add a campaign

1. Click **Add**.
2. Type a name of the campaign in the campaign naming form that appears.

Name  \*

3. Click **Finish**.

The new campaign immediately appears in the promotional campaigns table.

To delete a campaign, click **Delete** and confirm.

## 7 Reporting

In the **Reports** section, you can quickly and easily access statistics reports to review and analyze a wide range of data as follows:

- [Track sales, commissions, profits, etc. for different periods](#)
- [Monitor your progress day by day in daily statistics reports](#)
- [Analyze and compare conversion rates and assess your affiliates' performance](#)
- [Analyze performance of the web sites and URLs referring to your product page](#)
- [Access refund transactions statistics](#)
- [View and analyze transaction details](#)
- [Get an overview of your promotional campaigns](#)
- [Determine most popular referring keywords](#)

In most cases, you build reports by applying a special filter as follows:

1. Select a product for which you want to create a report.
2. Specify the report period. You can select one of the values from the drop-down list or set any other time range by specifying the start and end dates.
3. Specify if you need a report on your own sales, the sales of the affiliates promoting your products, or all sales closed within a specified period.

After you apply the filter by clicking **Show**, a tabular statistics report displays the data complying with your filter criteria.

Using the section top menu links, you can generate and view the following types of reports:

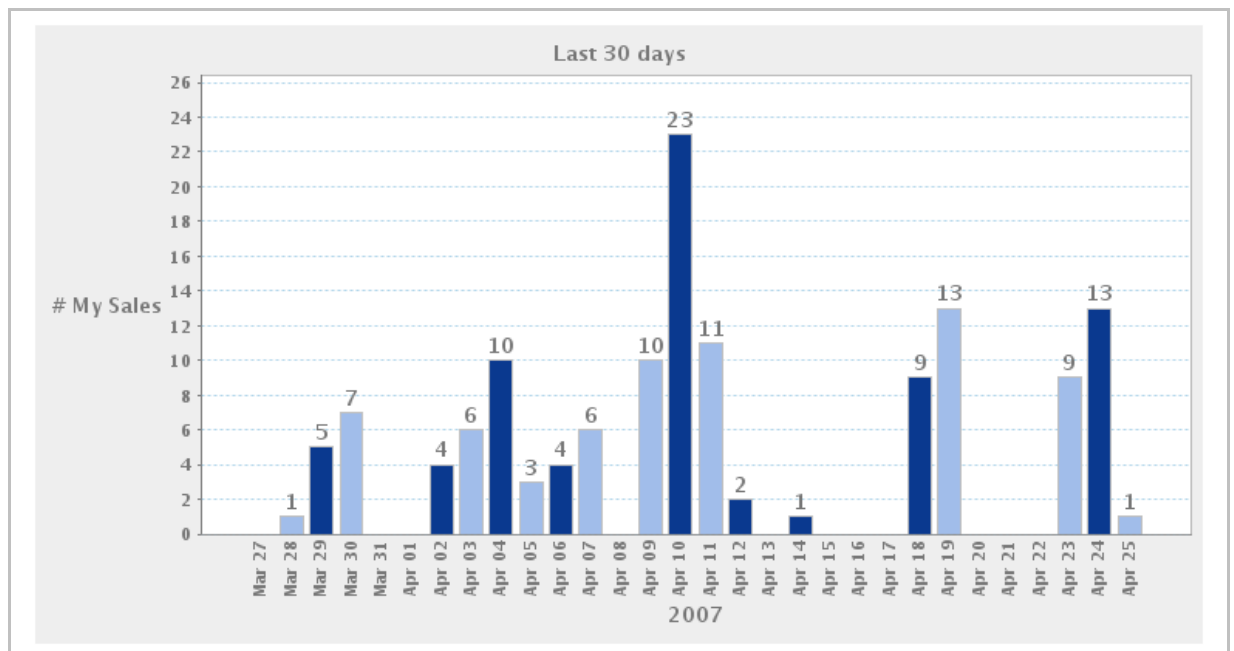
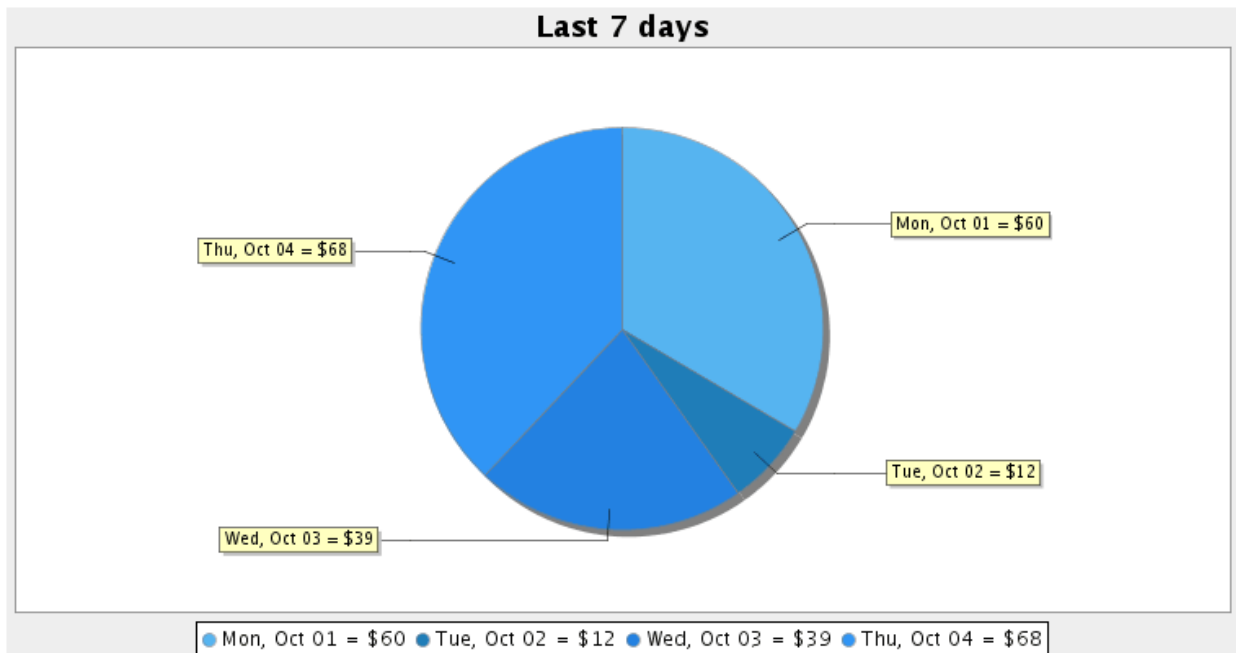
- **General reports** show your total profit for a specified period and provide detailed statistics for each product you sell or promote including sales, earnings, commissions, refunds, etc. You can build general reports for the current, previous day, last seven days, last thirty days, the current month, last month, or current year by making a selection in the **Select statistics period** drop-down list.

	Visitors [?]	Sales ▼	Conversions [?]	Refunds	Earnings [?]	Refunded money	Commissions Fees [?]	Profit ▼
My own	871	9	1.03%	0	130.50	0.00	0.00	130.50
Good Ebook (affiliated)	251	4	1.59%	0	90.00	0.00	0.00	90.00
URIAGE Tri-Actif Deodorant - Thermal Water (affiliated)	620	5	0.81%	0	40.50	0.00	0.00	40.50
Affiliates	0	0	0.00%	0	0.00	0.00	0.00	0.00
<b>Total</b>	<b>871</b>	<b>9</b>	<b>1.03%</b>	<b>0</b>	<b>130.50</b>	<b>0.00</b>	<b>0.00</b>	<b>130.50</b>
Referred members		0			0.00	0.00		0.00
								<b>130.50 USD</b>

The **Visitors** statistic counts the number of visitors within a specified period.

The **Conversions** statistic calculates the ratio of product sales to the number of visitors over a specified period of time.

To quickly plot one of the general report parameters in a chart, select a report parameter in the drop-down list under the tabular report. The figures below show a sample pie chart and a bar graph built for selected report parameters.



- **Daily reports** provide day-to-day statistics for visits to the marketplace, sales made, product views, profits made, etc.

To generate a daily report, specify the report criteria. After you apply the filter, the tabular daily report displays the data complying with your criteria.

Date	Views[?]	Visitors	Sales	Conv.[?]	Refunds	Earned[?]	Com./Fees[?]	Profit
[+] 2007-07-17	566	563	9	1.60 %	0 / \$ 0.00	\$ 212.00	\$ 13.00	\$ 199.00
[+] 2007-07-16	1275	854	11	1.29 %	0 / \$ 0.00	\$ 255.00	\$ 15.00	\$ 240.00
2007-07-15	0	0	0	0.00 %	0 / \$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
2007-07-14	0	0	0	0.00 %	0 / \$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
[+] 2007-07-13	554	554	0	0.00 %	0 / \$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
[+] 2007-07-12	1182	1178	14	1.19 %	0 / \$ 0.00	\$ 353.00	\$ 21.00	\$ 332.00
[+] 2007-07-11	476	307	5	1.63 %	0 / \$ 0.00	\$ 130.00	\$ 6.00	\$ 124.00

To view detailed statistics for each day within the selected period, click the plus sign.

- **Conversion reports** allow you to compare total views, sales, and conversion rates against affiliate views, sales, and conversions for each of your products.

Product	Price	Views [?]	Visitors [?]	Sales	Conversions [?]	Referred % [?]	Product Type
[+] Monitor Control v2.47	\$23.00	45	45	1	2.22%	0.00%	Downloadable
[+] Anti-Spyware Doctor 2007	\$10.00	342	342	3	0.88%	40.00%	Downloadable
[+] "Internet Marketing Success" ebook	\$36.00	240	240	2	0.83%	33.33%	Downloadable
[+] How to Disassemble Your Laptop	\$30.00	151	148	2	1.35%	33.33%	Downloadable
[+] URIAGE Tri-Activ Deodorant - Thermal Water	\$19.00	116	114	2	1.75%	50.00%	Material

- **Referral reports** lists all sources referring to your product pages and allow you to analyze performance of each referrer.

To generate a referral report, specify the report criteria as described above. The referral tabular report immediately shows the data that correspond to your criteria.

The **Views** statistic counts the number of times your products were viewed through a referring link

The **Visitors** statistic counts the number of visitors who came to your product pages through a referring link.

The **Conversion Rate** statistic calculates the ratio of sales to visitors who followed a referring link.

To unfold a report on a referring source, click the plus sign next to its name.

- **Refund reports** provide an overview of all refund transactions, including the total number of sales and refunds made within a specified period and an overall refund rate.

Build a refund report by applying the filter as described above.

The data complying with your filter criteria are displayed in a tabular report that shows identifiers of refund transactions, names and cost of products on which refunds were made, payment processors, merchants, and customers involved in the transactions.

Trans. Id	Product	Price	Payment processor	Merchant	Customer	
467	RWQ	\$20.00	Worldpay	Matthew Walters	Allen Hoffman	<a href="#">View Order</a>
500	Portable MP3 Player iPod	\$140.00	PayPal	Nicholas Briggs	Marc Berg	<a href="#">View Order</a>

To access the details of an order and product(s) associated with a refund transaction, click **View Order** in the appropriate report entry.

The details page contains a product table, shows general, billing, and payment information on the order, and provides a link to the order-related transaction.


Product #	Product Name	Product Price
1	Portable MP3 Player iPod	140.00 USD

<b>Common Information</b>	
Order Id	751
Date	2007-04-25 20:09
Payment Type	VISA
Customer	Matthew Walters
<b>Billing Information</b>	
Full Name	Marsha Berger
Address	57 High Street
City	Santa Cruz
State/Province	California
Postal Code	95064
Country	United States
Email	m.berger@hotmail.com
Phone	65485
<b>Payment Information</b>	
Products Amount	140.00 USD
<b>Total Amount</b>	<b>140.00 USD</b>
<a href="#">View Transaction Information</a>	



- **My Campaigns reports** show information on all your promotional campaigns including promoted products, their prices, commissions earned, the current status of each campaign, promotion tools and links, etc.

You can delete affiliated products by clicking the cross icon.

ID	Image	Product	Price	Earn	Status [?]				
21		Flower Power 2007 edition	\$20.00	60.00%	Enabled	Stats	Tools	Links	X

- **Transaction reports** provide details of all transactions concluded during the selected period and complying with other criteria you specified in the report filter. The tabular report gives a date and exact time of each transaction, shows amounts paid to all parties to the transaction, provides accounts used for the payments, etc.

Date	Product	Amount	Merchant	Affiliate	Customer	Country	Profit	Paid	Type
2007-10-05	Uriage	\$ 27.00	You	n/a	Gary O'Neil	UK	\$ 26.00	CARD	Sale

- **Keyword reports** show the keywords that your visitors used to find your products through search engines, counts sales generated using the keywords, visitors referred to your product pages by search engines using the keywords, the number of product views, and conversion rate.

Keyword	Views [?]	Visitors	Sales	Conv.Rate [?]
[+] some good ebook	894	889	2	0.22%

Keywords in the report are ordered by popularity. Click the plus sign next to a keyword to unfold a list of search engines that run a search for the keyword and access keyword statistics for each of the engines.

Keyword statistics allow you to

- Determine most popular terms by the number of sales they generated and the number of visitors they referred
- Discover most successful combinations of keywords and referrers

## 8 Promoting Click2Sell


You can refer new users (further alternately called members) to Click2Sell and earn a commission on the revenue of the system generated by referred members.

In the **Promote Click2Sell** section, you can:

- Read the promotion and reward policies
- Access the sign-up link offered by the system for referring users
- Track performance of your referred users

### 8.1 Viewing Click2Sell Promotion Policies

The initial page of the **Promote Click2Sell** section provides a general overview of the promotion policies and presents examples illustrating how the system rewards merchants and affiliates for referrals and how referral commissions are calculated.

To refer new users to the system, use the sign-up link in the **Tools** frame. You can copy the link by clicking the **Copy to Clipboard** icon  and place it on any HTML page or send by e-mail.


### 8.2 Viewing Referred Members


To access the details of the registered members you have brought into the system, go to the **Referred Users** subsection.

All referred members are listed in a table that shows their names, sales made by the members acting as merchants or affiliates, the profit you have earned, contact e-mail, and the current status of each user, which can be either **Active** or **Inactive**.

You can quickly find members registered within a certain period by applying the **My Referred Member** filter.

**My Referred Members**

Start Date: 2007-09-28 

End Date: 2007-10-05 

[Show](#)

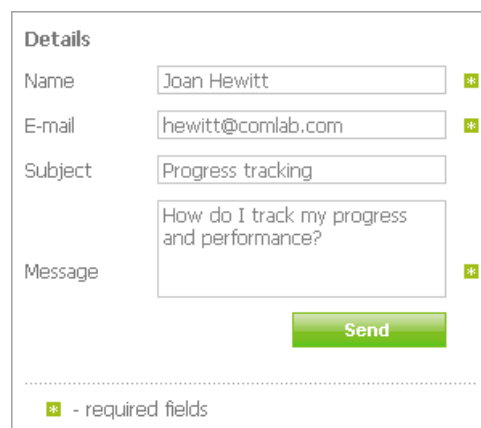
## 9 Customer Support

If you have any problems or questions concerning the work of Click2Sell or need any assistance with the system, go to the **Customer Support** section where you can do the following:

- ❑ Directly contact Click2Sell staff with any comments or questions
- ❑ Search for an answer in frequently asked questions
- ❑ Submit a support request to the Help Desk team
- ❑ Browse forum topics in the **Forum** subsection
- ❑ Consult user guides

### 9.1 Contacting Click2Sell

In the **Contact Us** subsection, you can post your comments, questions, or suggestions using a special form.



The screenshot shows a contact form titled "Details". It contains the following fields:

- Name:** Joan Hewitt (required field)
- E-mail:** hewitt@comlab.com (required field)
- Subject:** Progress tracking
- Message:** How do I track my progress and performance? (required field)

A green "Send" button is located below the message field. At the bottom of the form, there is a legend: "✳ - required fields".

Fill out the contact form and click **Send**.

### 9.2 Searching for Answers in Frequently Asked Questions

Referring to frequently asked questions in the **F.A.Q.** subsection may be the fastest way of answering your query. To facilitate the search process, all questions are organized into categories.

### 9.3 Managing Help Desk Requests

To contact the support staff through the Help Desk, go to the **Help Desk** subsection. If you have more than one request, the initial page of the subsection displays a table showing the state of each request. You can quickly filter the list by request state.

In the **Help Desk** subsection you can:

- ❑ Submit a request
- ❑ Update request details
- ❑ Re-open a resolved request
- ❑ Close a request
- ❑ View request resolution history

### 9.3.1 Help Request Flow

Handling of a request involves a number of procedures described below. Each action on a request changes the request status. You can view statuses of your requests in the table.

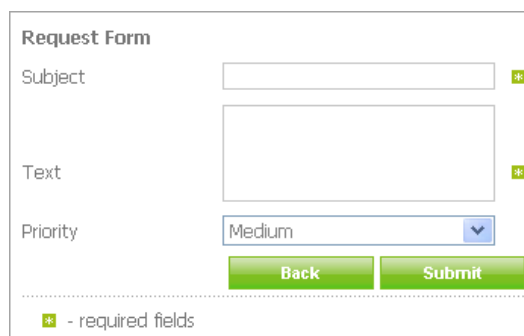
- Once you have submitted a request to the Help Desk, it is assigned to a support staff member and receives the **Opened** status.
- The assigned staff member can do one of the following:
  - Provide a solution to your request and set its status to **Resolved**.
  - Ask for additional details and set the request status to **Need More Info**.
- Once the staff member has responded to your request, you can:
  - Close the resolved request if you are satisfied with the response.
  - Re-open the resolved request if you are unsatisfied with the response.
  - Provide extra details if the staff member requested more information from you.

*Note.* You can update or close a request whenever you wish.

### 9.3.2 Request Handling Procedures

To submit a request

1. Click the **New Request** button. The request submission form appears.



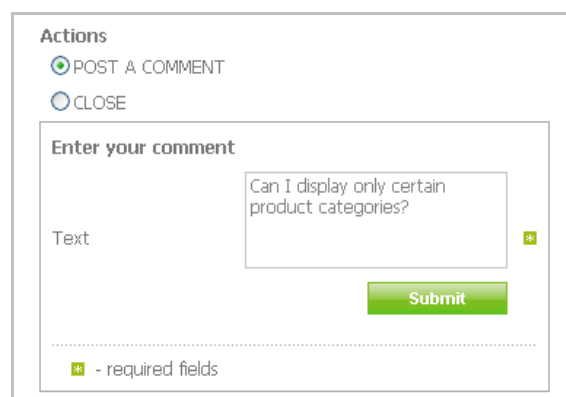
The screenshot shows a 'Request Form' with the following fields and controls:

- Subject:** A text input field with a required field indicator (a small green asterisk).
- Text:** A larger text area with a required field indicator.
- Priority:** A dropdown menu currently set to 'Medium'.
- Buttons:** Two green buttons labeled 'Back' and 'Submit'.
- Legend:** A small green asterisk followed by the text '- required fields'.

2. Specify the subject of the request and enter the request in the text field.
3. Set the request priority, which can be **Low**, **Medium**, or **High**.
4. Click **Submit**.

To update a request

1. Find the submitted request in the table.
2. Move the mouse cursor over the required row until it is highlighted in green and click. The request details page opens.
3. Under Actions, select Post a Comment.
4. In the text box, enter the required text. Then click **Submit**.



The screenshot shows the 'Actions' section of a request details page:

- Actions:** Two radio buttons are visible: 'POST A COMMENT' (which is selected) and 'CLOSE'.
- Text Input:** A text area labeled 'Enter your comment' with a required field indicator. The text 'Can I display only certain product categories?' is entered.
- Buttons:** A green 'Submit' button.
- Legend:** A small green asterisk followed by the text '- required fields'.

To re-open a resolved request

1. Select the request that you wish to re-open.
2. On the request details page, select the **Re-open** radio button under **Actions**.
3. Add the required information in the text field.

4. Click **Submit**.

To close a request, select **Close** on the request details page, and click **Submit**.

On the details page, you can view the request history that shows dates of actions performed on the request, initial phrases of response messages which text you can view in full by clicking the plus sign, names of responsible persons, and request statuses.

Request History			
Date	Message	Sender	State
2007-04-12 13:15	<a href="#">+</a> No, you are not responsible fo...	Administrator	<b>Resolved</b>