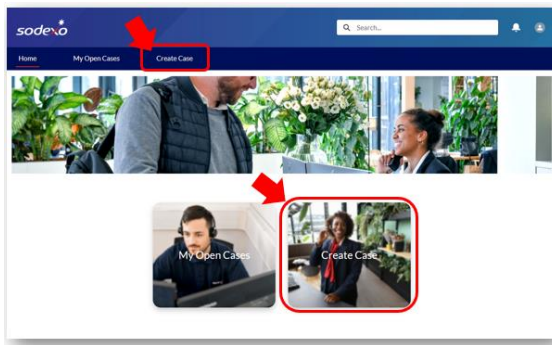
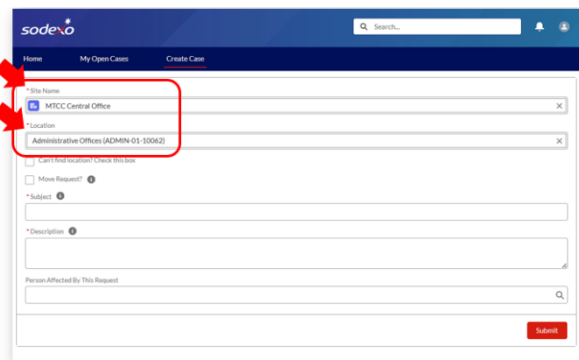


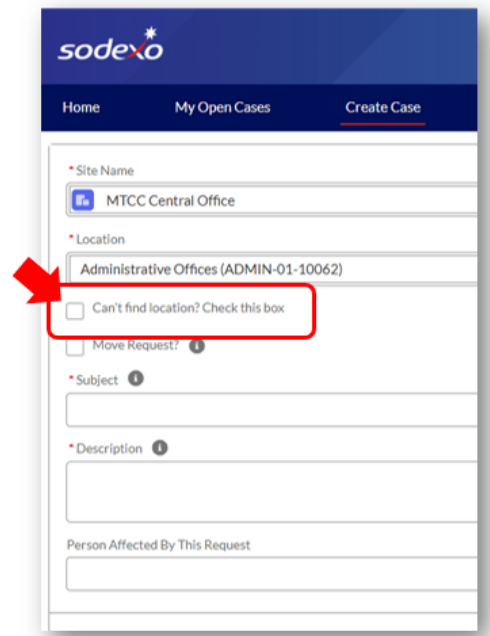
Keystone Consumer Portal – Create a Case Quick Guide



1. Select the **Create Case** heading or the **Create Case** tile to open the **Create Case** form



2. The **Site Name** and **Location** will auto-populate, if the Location information was selected with the User **Profile**
3. The **Location** can be updated, if needed



4. Should the need be to select another **Location**, and you are unable to find that **Location** after searching, then check the **Can't find location? Check this box** checkbox



5. If the request is for a Move, check the **Move Request?** Checkbox

6. New fields will appear

7. Enter the **Move Request Date** and **Time**

8. Select the **Move from Location**

9. Select the **Move To Location**

10. Enter a **Subject** for the Case, note the '**Information Icon**', click to see additional information for any field with this icon



The screenshot shows the 'Create Case' form in the Sodexo portal. The form has a blue header with the Sodexo logo and navigation tabs: Home, My Open Cases, and Create Case. The form fields are as follows:

- Site Name:** MTCC Central Office
- Location:** Administrative Offices (ADMIN-01-10062)
- ☐ Can't find location? Check this box
- ☐ Move Request? ⓘ
- Subject ⓘ:** (empty)
- Description ⓘ:** (empty, highlighted with a red box and a red arrow)
- Person Affected By This Request:** (empty, highlighted with a red box and a red arrow)

11. Enter a **Description** for this **Case**. The **Description** is an opportunity to provide any details that will assist in understanding the task or need for the **Case**, please be detailed as needed.

12. If this **Case** is being submitted for someone else, if someone else is the **Person Affected By This Request**, please enter their name into the **Person Affected by This Request** field.

The screenshot shows the 'Create Case' form with all fields filled out. The form is as follows:

- Site Name:** MTCC Central Office
- Location:** Administrative Offices (ADMIN-01-10062)
- ☐ Can't find location? Check this box
- ☐ Move Request? ⓘ
- Subject ⓘ:** Administrative Office | Main Building | Overhead Light is Out
- Description ⓘ:** The Overhead Light is out in the Administrative Office, near the back of the room.
- Person Affected By This Request:** John Wick
- Submit:** (button, highlighted with a red box and a red arrow)

13. Once all fields are properly completed, select the **Submit** button



Home My Open Cases Create Case

Create Case - Portal

Do you want to attach any files?

Upload Files Or drop files

Size Limit: 2GB. Allowed File Types: bmp, cfr, csv, doc, docx, dwg, gif, html, jpg, jpeg, mov, mp4, odp, ods, odt, pdf, png, ppt, pptx, rtf, txt, wm, wma, wmv, xls, xlsx, xml, xsl, zip

Submit

14. If a file or files need to be attached, either select the **Upload Files** button and navigate to the file to upload or drag and **drop the file** onto the page for upload

15. Note that the maximum file size is 2GB, the accepted file types are listed on the screen

16. More than one file may be uploaded

17. Select the **Submit** button when completed

sodexo

Home My Open Cases Create Case

Thank you for your submission!
Your Case 00012160 has been created.

18. A message that Your Case **[Case Number]** has been created will be displayed

19. The **Case number** is a **Hyperlink**, use the **Hyperlink** to navigate to the **Case Record**

sodexo

Home My Open Cases Create Case

Case Administrative Office | Main Building | Too Hot

Case Number: 00012161 Status: New Account Name: MTEC Central Office Location: Administrative Offices (ADMIN-01-10062)

DETAILS RELATED

Case Number: 00012161 Status: New Case Origin: Customer Portal Receive Notifications For This Case: (X)

Site Information
Site Name: MTEC Central Office Location: Administrative Offices (ADMIN-01-10062) Manually Entered Location

Client Cost Center
Client Department

Post
Share an update...
Search this feed...
Jackson Betty J. Customer created this case.
00012161
View more details
Like Comment
Write a comment...

20. The **Details** and **Related** tabs are available to review and update as needed

21. Chatter **Posts** are available to communicate with the Sodexo Team