



SAFEGUARD GLOBAL

Support Center

External User Guide for GEO Clients & Workers

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		Danielle Evans and Jamie Noell	

From v1.1 and on all revisions made for the most current version are highlighted in yellow both in the table of contents as well as the body of the user guide. Sections that were removed completely are not indicated.

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Overview

What is the Safeguard Global Support Center?

The Safeguard Global Support Center is a web-based query management tool that Safeguard Global has selected to manage its client, worker, and supplier queries. This is the application utilized by the GEO teams that fields your inquiry needs. This document outlines the processes in which you will use to submit requests to Safeguard Global for GEO, at this website address: geoservices.safeguardglobal.com.

Who Will Have Access to Safeguard Global Support Center?

All current authorized contacts within your organization will be added to Support Center by the Safeguard Global team during onboarding. Remember that due to data security, data protection and audit requirements, all GEO client and worker contacts who need access to the system must be formally authorized by your company.

If you need to add, change, or remove a client or worker contact, simply notify your regular GEO Consultant at Safeguard Global. Safeguard Global will then review and action any necessary work.

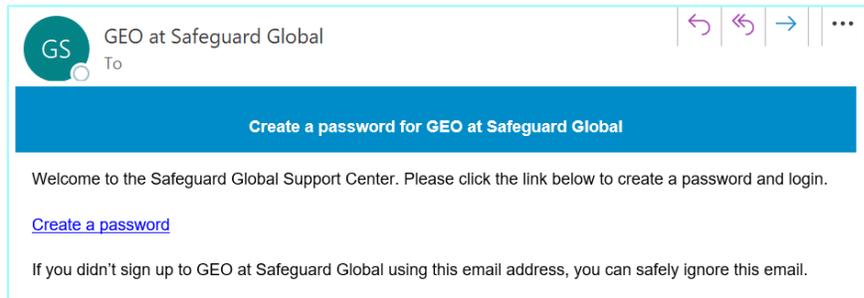
Please note that using the Support Center portal is a requirement especially for the ability to self-monitor tickets. Both GEO client and worker contacts will only have visibility of their own requests unless a client specifically recommends enhanced access described in the Request Monitoring section.

Browser Considerations

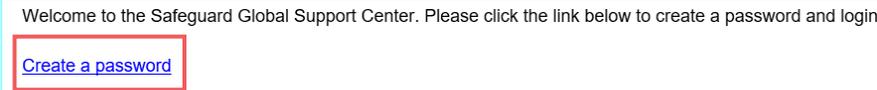
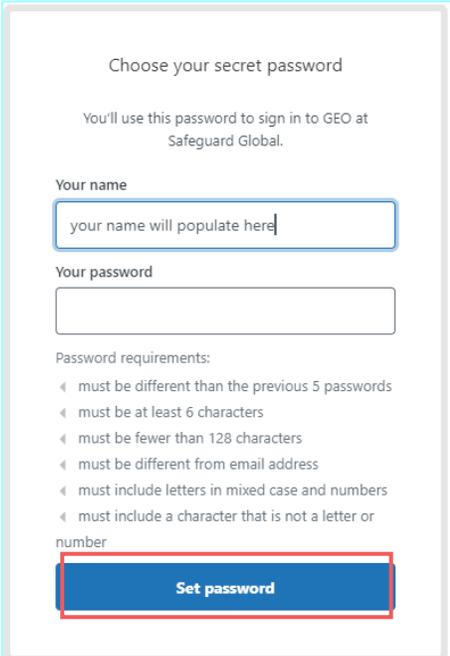
The Support Center may be accessed using Microsoft Edge, Chrome, Firefox, or Safari. Please note that the Support Center does not support Internet Explorer 11.

Logging in for the First Time

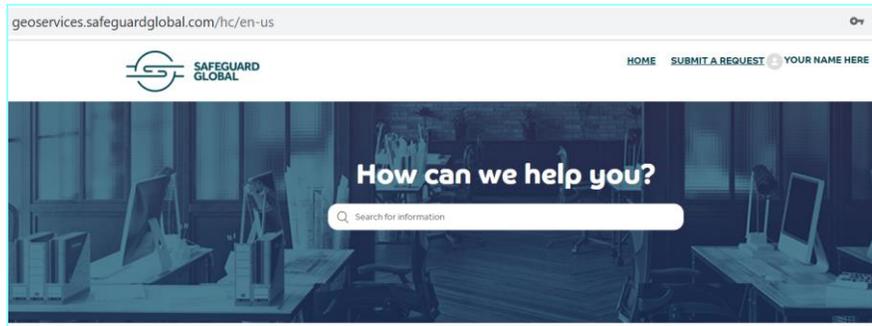
When your contact details are initially entered into the Safeguard Global Support Center (GSC) application by Safeguard Global, you will receive a verification email, like the example below:



To easily track your submitted requests, you must have a login and password to the Safeguard Global Support Center portal application.

Tasks	Snapshot
1. Click on the link in the welcome email.	
2. Your name should already be populated. Please verify/update as needed. Enter your desired password keeping with the outlined requirements below. Click Set password when complete.	

3. Once you have chosen your password, you will be logged into the Safeguard Global Support Center.



Once setup and in case you have forgotten your password, there is a **Forgot my Password** option on the login screen. Enter your registered email address and you will receive an automated email with a link to follow to choose a new password.

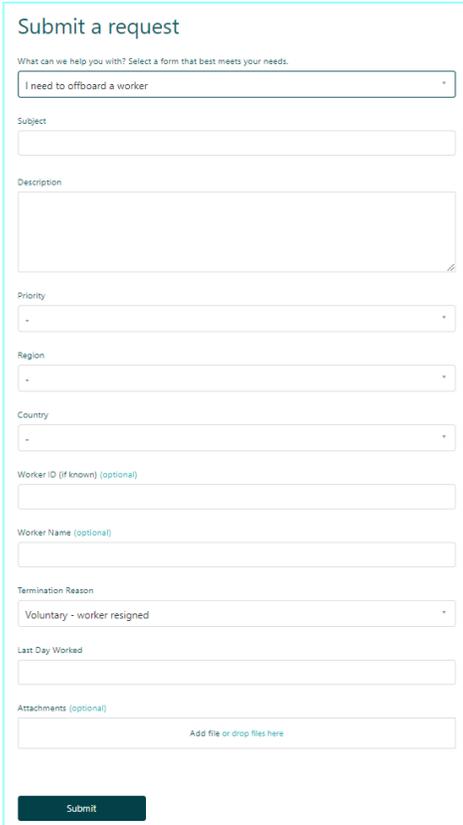
A screenshot of the login form titled 'Sign in to GEO at Safeguard Global'. It includes fields for 'Email' and 'Password', a checkbox for 'Stay signed in', a blue 'Sign in' button, and a red-bordered link for 'Forgot my password'.

When logging in on a day-to-day basis, follow this link and save to your favorites/bookmarks:

<https://geoservices.safeguardglobal.com/>

Request Creation

A request can be created by clicking “Submit a request” on the home page and typing in your query.

Tasks	Snapshot
<p>1. Click Submit a Request on the top right of the page.</p>	
<p>2. Select the form that best meets your needs from the dropdown.</p>	
<p>3. Your screen will refresh, and several new fields will display (depending on the form choice you made in the previous step). Fill out the information that best describes your request. Request subjects should always contain <i>country</i>, <i>entity name</i> and a <i>brief subject</i> of the query. Click Submit when finished.</p>	

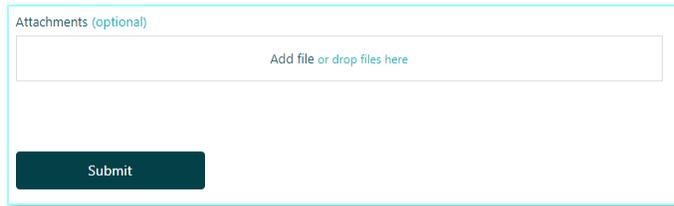
Typing queries is simple, but please note that there are some specific exceptions:

- The formatting function within the Service Desk is minimal.
- Highlighted sections or varying colors of emphasis will not be recognized.
- Tables pasted into the body of an email will not appear within a ticket.

If you need to send tables or any text with specific formatting, they will need to be copied into a Word document and attached to the request.

Attachments

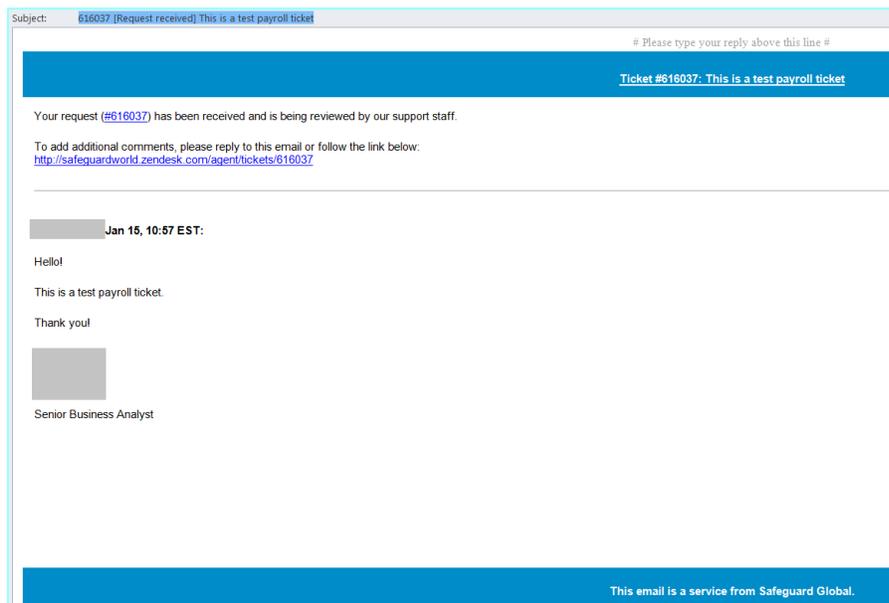
Attachments can be added to requests via the portal. In the portal, there is a field at the bottom of the request submission form for adding attachments. Attachments can be added to existing tickets in the same way.



Attachments added by Safeguard Global can be accessed directly in the portal or by clicking the link to the attachment in the email notification. The link will require you to login to the portal to view. Because you have logged into a secure portal, you will be able to safely send sensitive files via the portal through the above process.

Request Confirmation

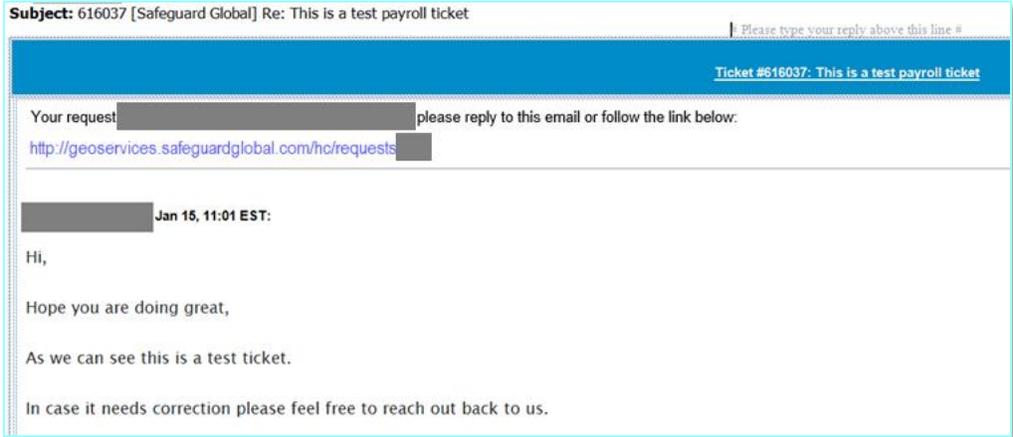
Once submitted, you will receive an automated response to confirm receipt of your request, which will contain the request number (to be quoted on any future correspondence) and the original request.



Your request will be routed to the Specialist or GEO Consultant who is accountable to assist you based on the nature of your query.

Request Handling

Once received, the request will be assigned to a GEO Consultant or Specialist who will regularly keep you updated on the status of the request. If your GEO Consultant or Specialist needs to contact you to request more information, you will receive an email like the one below:



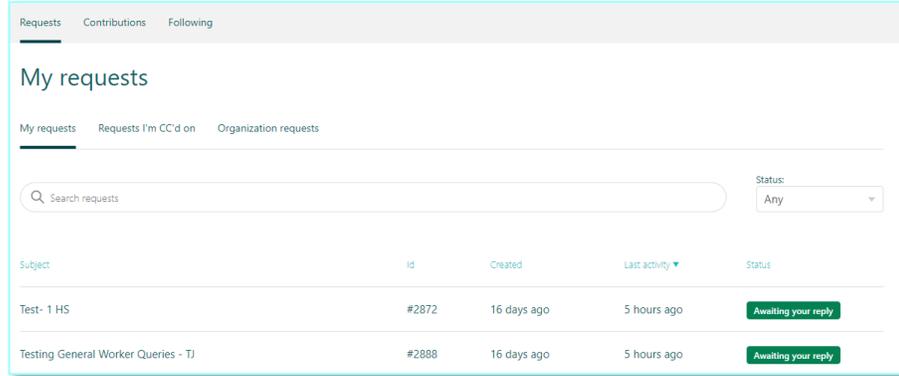
PLEASE NOTE: If you reply to this email, do not change the contents of the Subject line. Doing so will generate a new request.

Request Monitoring

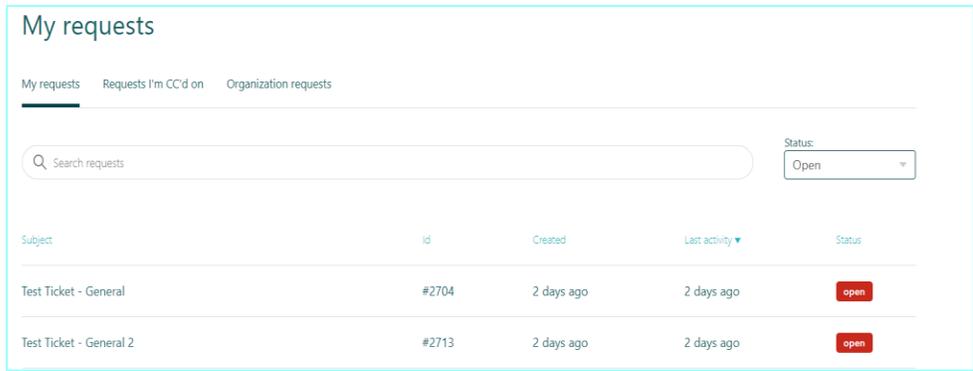
You can log in to the Safeguard Global Support Center at any time and monitor the status or add an update to the conversation.

Tasks	Snapshot
<p>1. Login to the portal using your email address and password. On the top right of the page next to your name, there will be a down arrow. Click the down arrow and select My activities.</p>	<p>The screenshot shows the 'Submit a request' button and a user profile dropdown menu. The dropdown menu is open, showing 'My activities' and 'My profile' options. Red boxes highlight the dropdown arrow and the 'My activities' option.</p>

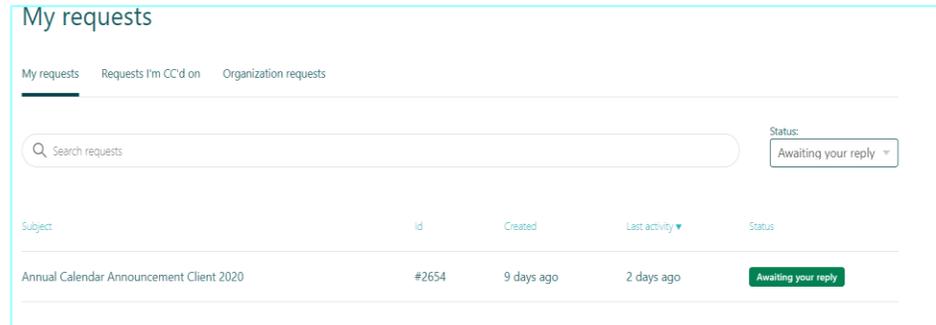
2. You will see all requests listed under **Requests > My requests**. You can view the status of each request on the right and can even filter on it with the Status dropdown.



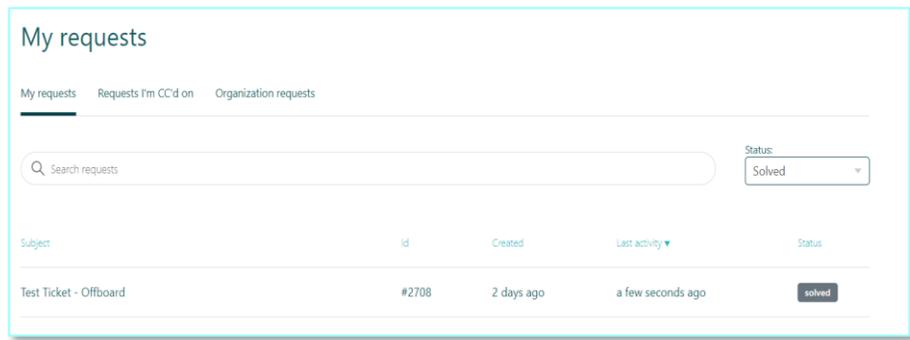
3. In the **Status** dropdown, select **Open**. An open status indicates that your request has been submitted and is waiting a reply from Safeguard Global.



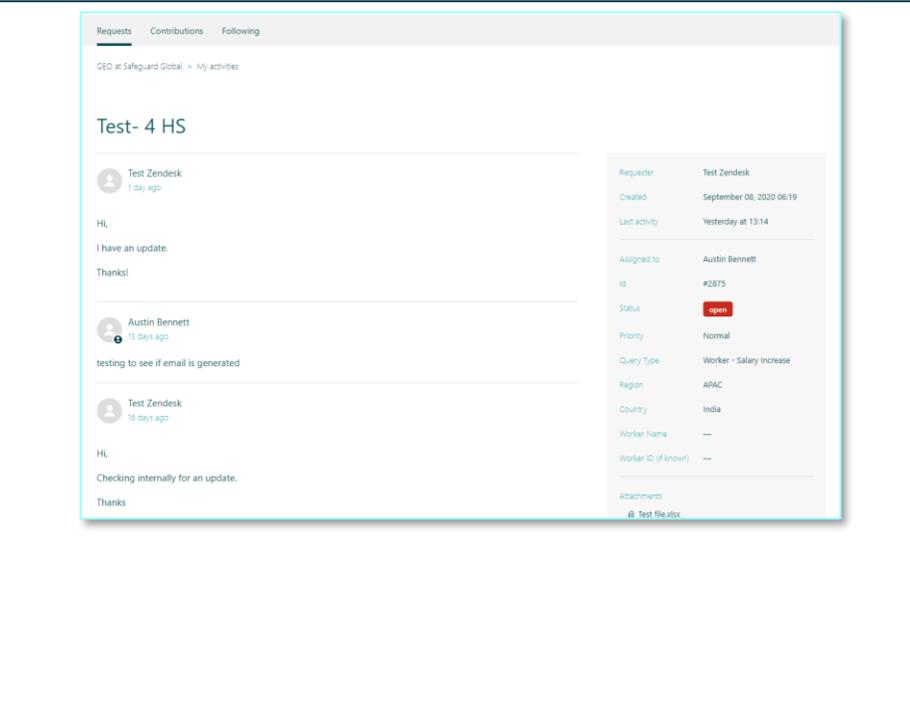
4. In the **Status** dropdown, select **Awaiting your reply**. The awaiting your reply status indicates that Safeguard Global has provided a response and is waiting a reply from yourself to complete the resolution of your request.



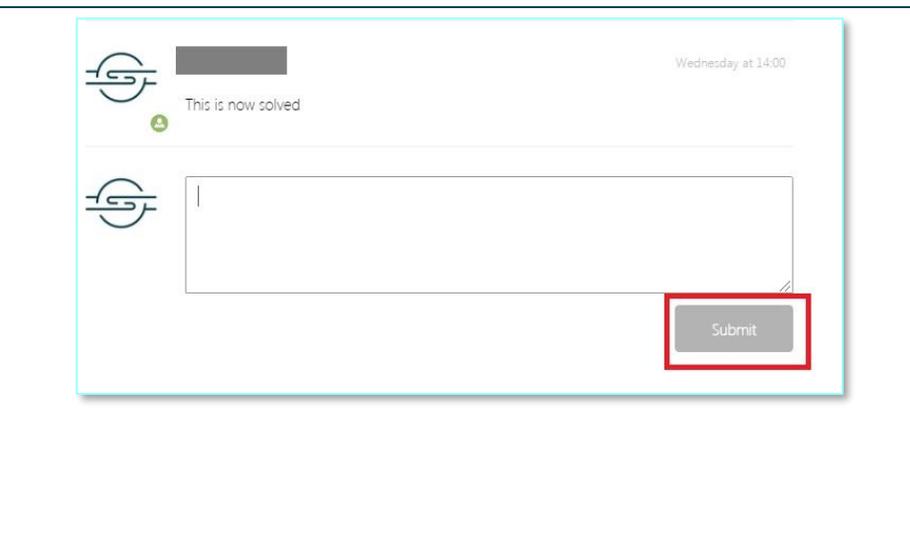
5. In the **Status** dropdown, select **Solved**. The solved status indicates that Safeguard Global has completed the request and no further action is required.



6. The subject line on the main My requests list contains hyperlinks that when clicked on, will provide more detail about your request.



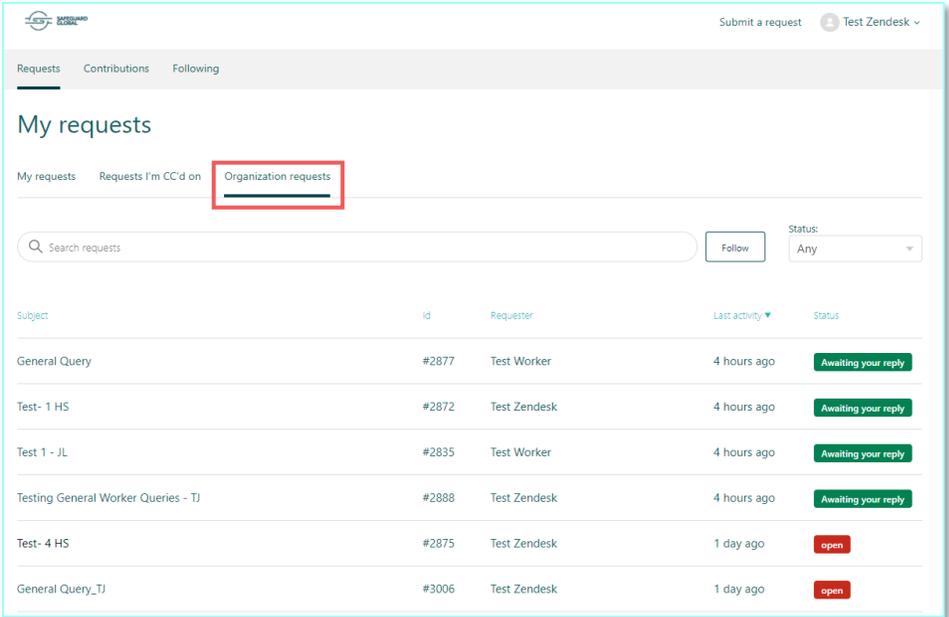
7. If the viewed request is marked as solved, but you have more questions or more information to add, scroll to the bottom of the page, enter in your text in the bottom box



<p>and then click Submit. This will reopen the conversation for your request.</p>	
<p>8. If the request has been marked Solved but was over 8 business days ago, you'll get a different option on the bottom of the page.</p>	<div data-bbox="581 453 1279 541" style="border: 1px solid #ccc; padding: 10px; text-align: center;"> <p>This request is closed for comments. You can create a follow-up.</p> </div>
<p>9. Once clicked, the ticket screen will appear pre-populated. Add your new information/query and click submit again. The specific items requested on the form may vary from this image.</p> <p>If you have a new request, please click Submit a Request to start a new one, instead of replying to an old email or clicking create a follow-up.</p>	<div data-bbox="613 842 1256 1787" style="border: 1px solid #ccc; padding: 10px;"> <p style="text-align: center;">T</p> <h3 style="margin: 0;">Submit a request</h3> <p>Type of requester *</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 10px;">Client</div> <p>Please specify the nature of your query: *</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 10px;">=</div> <p>Country *</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 10px;">=</div> <p>Worker Name</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 10px;"></div> <p>Worker ID (if known)</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 10px;"></div> <p>Subject *</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 10px;"></div> <p>Description *</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 10px; min-height: 40px;"></div> <p>Attachments</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 10px; text-align: center;">Add file or drop files here</div> <div style="background-color: #003366; color: white; padding: 5px; text-align: center; width: fit-content; margin: 0 auto;">Submit</div> </div>

Enhanced Requests View Access

Clients may also view all requests within their organization by clicking **Organization requests** on the **My requests** page. This is not setup as standard, but if you would like to have this view, please contact your GEO Consultant.



Note: This enhancement is for client purpose only.

Request Closure

When your query is solved, you will receive the answer both in the Safeguard Global Support Center as well as via email.

Your request (#900) has been deemed solved. To reopen, please reply to this email or follow the link below:
<http://geoservices.safeguardglobal.com/hc/requests/900>

Jamie Noell (GEO at Safeguard Global)
Oct 12, 2022, 5:59 PM GMT+1

Here is the additional information you requested.

Thank you.

Kind regards,
Chris Consultant
Safeguard Global

Attachment(s)
[credit.csv](#)

If you require further information or feel that your request has not been fully fulfilled, you can reply to the email or click the link to add to the conversation for this request in the Support Center. Either method will automatically reopen the request and notify your GEO Consultant or Specialist: otherwise no response is required. You can reopen a request up to 8 business days after it is marked as solved. If you reply to a solved request more than 8 business days later, a new request will automatically be generated upon submission.

Please Note: By sending a “Thank you” email, this will automatically reopen the request, and your GEO Consultant or Specialist will be required to close the request again.

FAQs

How do I send a secure attachment to Safeguard Global?

You can add attachments securely to your requests from within the Support Center. There is a field called **“Add file or drop files here”** at the bottom of the request submission form for adding attachments. Attachments can be added to existing tickets in the same way.

How do I access secure attachments sent by Safeguard Global?

When you receive a request update via email, there will be a URL link for any attachments sent, and this link will require you to login to the Support Center to view or download.

How can I check the status of my request?

Within the portal, go to My Activities > Requests > My Requests and select the applicable request from the list. You will be able to view the history or make any required amendments.

How can I monitor the status of requests made by others in my organization?

Within the portal, go to My Activities > Requests > Organization Requests. If you do not see this option to the right of the **“Requests I’m cc’d on”**, then you may request this enhanced access from your GEO Consultant or Specialist.

My question hasn’t been fully answered, so how do I reopen a query?

By responding to the final email received relating to your query or adding to the conversation for a request in the Support Center, this will automatically re-open your query and notify the GEO Consultant that further information is required.

How long do I have to reopen a solved request?

A request can be reopened up to 8 business days after the request is deemed solved. After this time, the request will be automatically closed. Please note that if you reply to a closed request, your query will still reach Safeguard Global, but a new request will be created.

How do I know my request are reaching the right person?

As you are sending request through the Support Center portal, Safeguard Global can assure you that your request will be allocated to the correct person internally who is best placed to resolve your issue. You will receive regular updates to advise you of the status.

I have forgotten my password, so what do I do?

There is an option on the login screen to click **“Forgot my Password”**. You will enter your registered email address and you will receive an automated email with a link to follow to choose a new password.