Manual PLM Xpert Helpdesk for customers

Procedure – - – ENG

Released B/1



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Table of Contents

1. General 4
1.1. Symbols 4
2. Questions by phone 5
3. Questions via the website 6
3.1. The support portal 6
3.2. Filtering tickets 7
3.3. Creating a ticket 8
3.4. Ticket status 10
3.5. Ticket type 10
3.6. Ticket updates 11
3.7. Support levels 11
4. Final note 12

1. General

Dear customer,

This manual explains the procedures and usage of our helpdesk system.

There are two ways to submit your helpdesk inquiries to PLM Xpert:

- By phone: 085-2029300
- Via the website: https://support.plmxpert.nl/servicePortal/

In the sections below, you can read more about the procedures for the various forms of support. The advantage of using support via the website is that a ticket is registered immediately, which helps ensure efficient handling.

1.1. Symbols

This document contains different notices that are explained below.

Tip



Tips are used to indicate instances where something can be solved or configured in an easy way. Disregarding the tip does not negatively impact the use of PRO.FILE.

Caution



Caution indicates a situation requiring extra attention, for example to avoid work getting lost.

Warning



Warning indicates a situation requiring serious attention, in order to avoid negative effects that are often hard or impossible to reverse.

2. Questions by phone

As you have come to expect from PLM Xpert, you can always call us. If your question cannot be answered immediately, or if the helpdesk is busy, the representative will create a support ticket for you. Following this support request, you will receive a callback, and the ticket will be further processed.

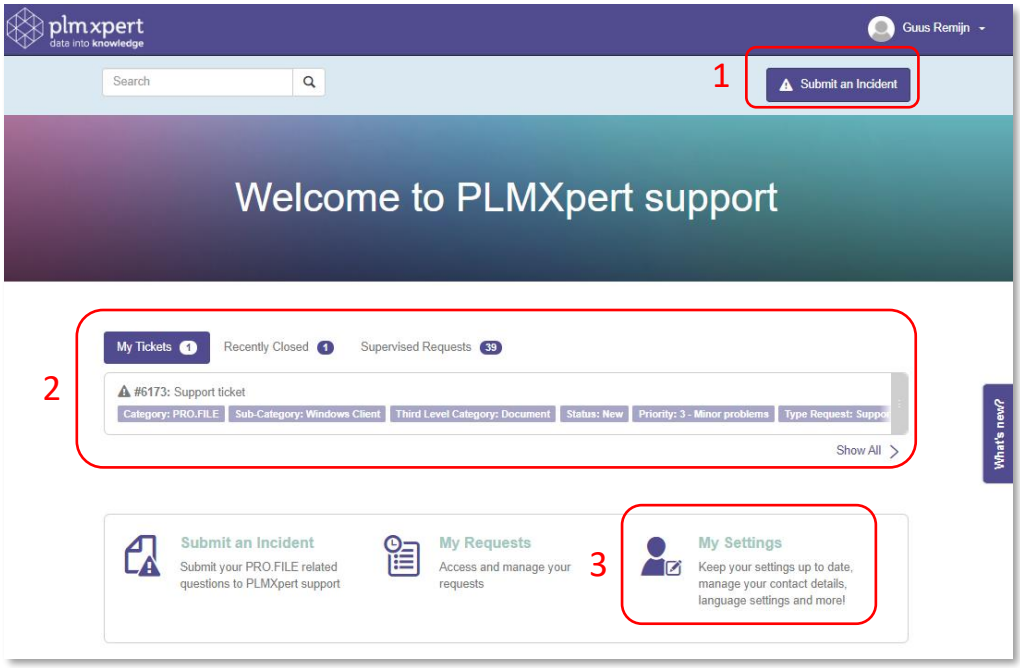
Once your issue has been resolved to your satisfaction following your phone call with PLM Xpert support, the ticket will be closed. You'll receive an email notification about this. This email will explain what the problem was and how it was resolved—which is handy for later, should you encounter the same issue again!

If the question cannot be answered immediately, the support ticket will remain open. You will then be kept informed of the progress via email.

3. Questions via the website

3.1. The support portal

When you go to https://support.plmxpert.nl/servicePortal/, you can log in using the login credentials provided to you. Once you've logged in, you'll see the following screen:



1. Submit an Incident

You can use this button to open a support ticket. When you click it, you can submit your questions online. For more information, see the chapter **Creating a Ticket**.

2. My Tickets

Here you can view the tickets you've submitted, organized into 2 or 3 tabs. Clicking **Show All** or going to **My Tickets** at the bottom will display all your tickets. The 3 tabs have the following functions:

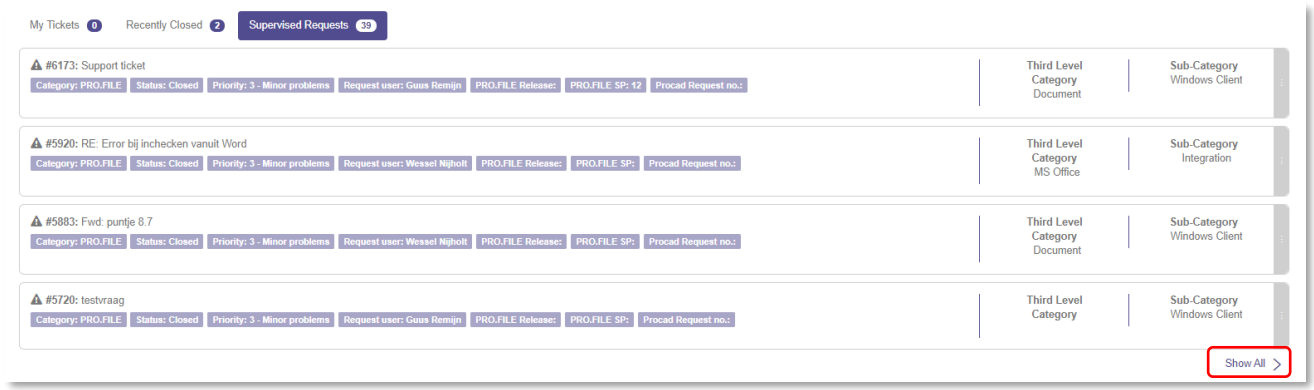
- **My Tickets**: The active tickets you've submitted.
- **Recently Closed**: The closed tickets you've submitted.
- **Supervised Tickets**: All tickets submitted by your organization. This tab is only visible to users with the 'Company supervisor' role within the helpdesk system. If you would like to view all of your organization's tickets, please contact us or create a ticket requesting this.

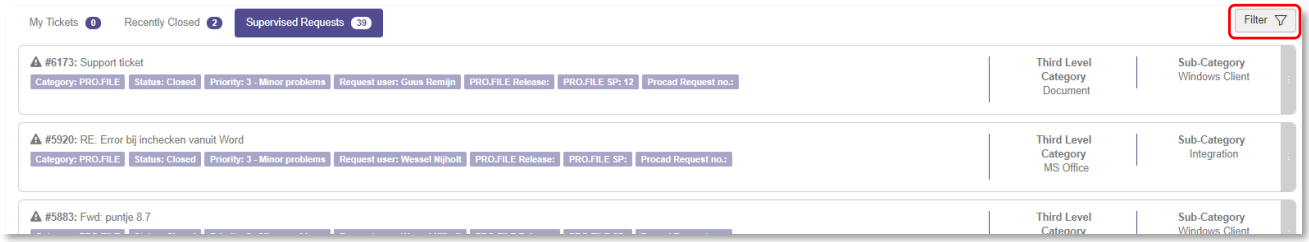
My Settings

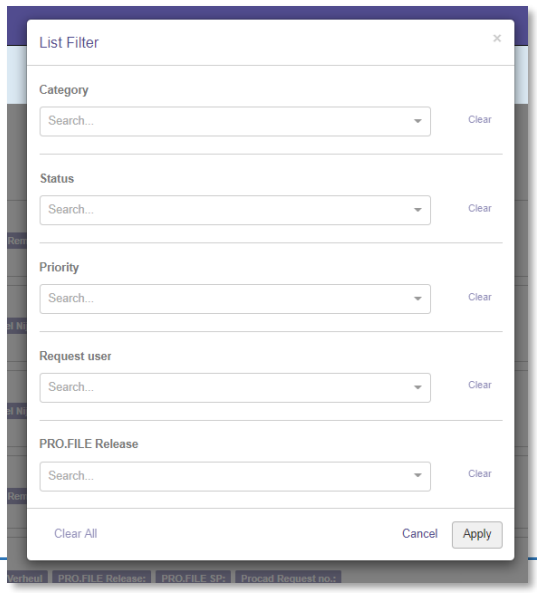
When you click here, you will be taken to a page with your personal information. Here, you can change your password, email address, and phone number, among other things.

3.2. Filtering tickets

Clicking **Show All** in the lower-right corner displays all tickets. This option is available under: **My Tickets**, **Recently Closed**, and **Supervised Tickets**. A screen will then open with a filter button in the upper-right corner. You can use this button to filter the list. For example, to show only tickets with the status **Waiting for Customer**, so you can see at a glance which tickets require action on your part.

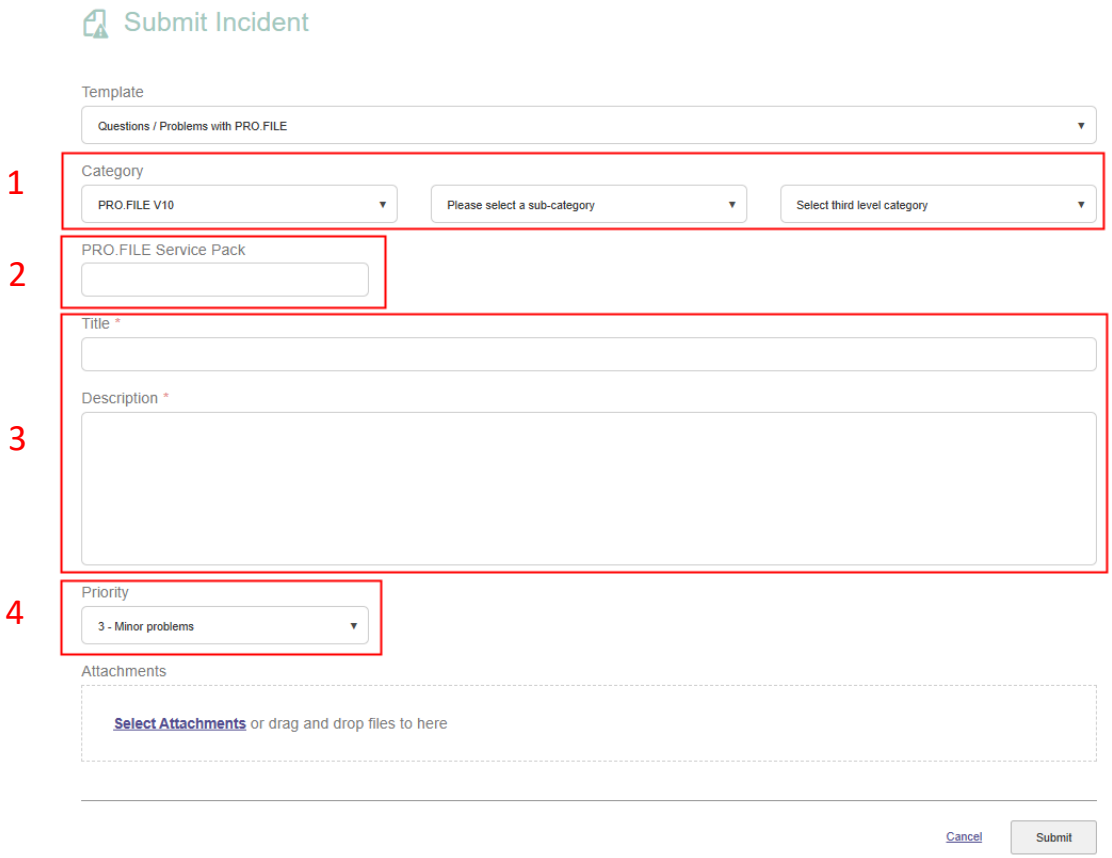






3.3. Creating a ticket

Once you're logged in and have clicked **Submit an Incident**, the following screen will appear:



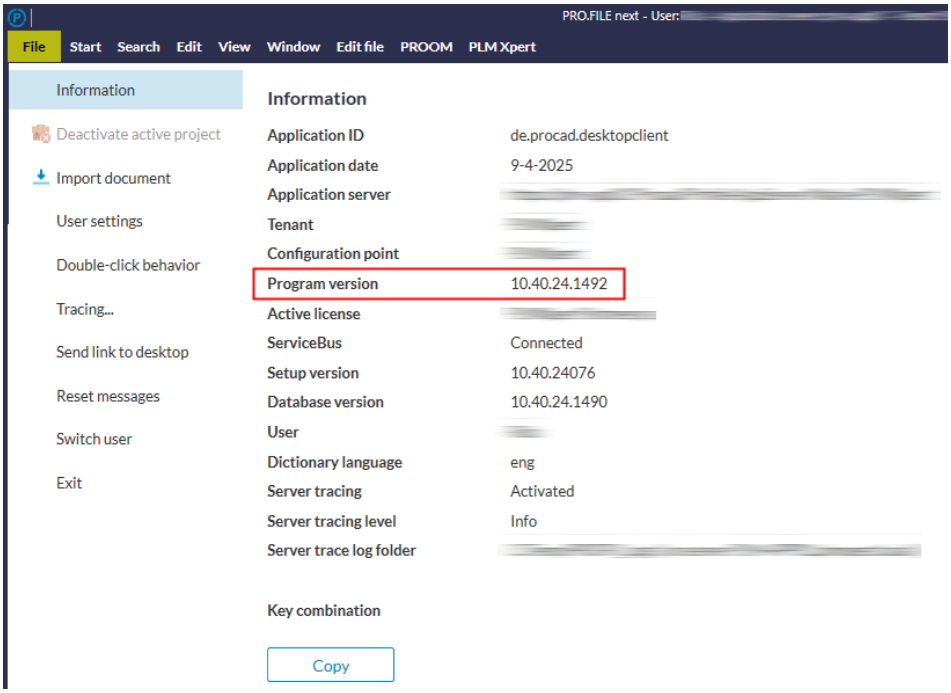
To ensure your ticket is handled as quickly and effectively as possible, it is important that you provide all information as completely as you can. Please keep the following points in mind:

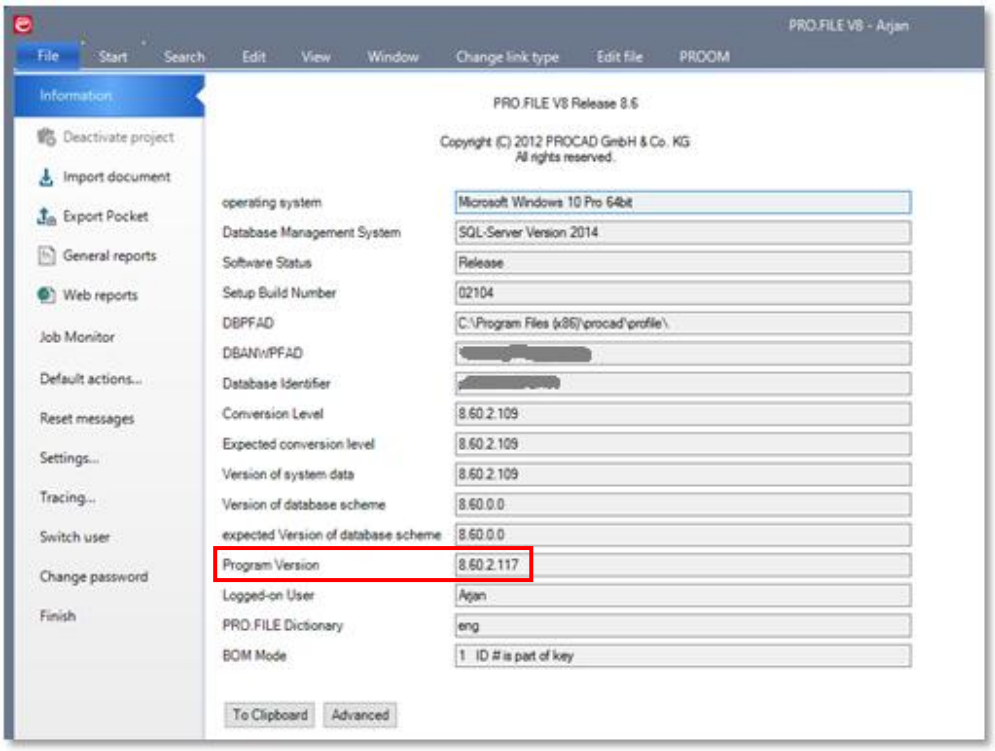
1. **Select a problem category.** If your specific category is not listed, please choose the one that is the best fit.

2. **Enter the Service Pack version of your PRO.FILE environment.** If you are unsure which Service Pack (SP) you are using, you can find this information in the PRO.FILE Client under “File -> Information” (see image).

3. **Provide a title and a description.** Ensure the title is concise and accurately reflects the issue; this helps us locate support tickets more quickly and easily. In the description, explain the problem as clearly as possible. Detail exactly what happens and which actions trigger the

issue. This makes it easier for us to reproduce the problem. If possible, please also include PRO.FILE traces, screenshots, and/or a video.





3.4. Ticket status

When you have submitted a support ticket, it is automatically assigned the status **New**. Below is a list of the statuses that a ticket can have:

Status	Meaning
Closed	The ticket has been resolved
Customer Response	You have responded to the ticket, and PLM Xpert still needs to follow up on the response
Enhancement Request	You have submitted a suggestion for an addition to PRO.FILE
In Progress: PLM Xpert	The ticket is being processed by PLM Xpert
In Progress: Revalize	The ticket is being processed by Revalize
New	The ticket has been newly created by you
Waiting for Customer	We need more information from you
Waiting for Service Pack	Revalize has reported that the issue will be resolved in an upcoming PRO.FILE Service Pack

You can view the status of all the tickets you've created that are recorded in the helpdesk by clicking **View Your Support Requests** after logging in.

3.5. Ticket type

There are the following types of tickets:

Support

By default, a new ticket is assigned the type **Support**.

Enhancement Request

If a particular feature does not exist, it can be submitted to Revalize as an enhancement request. They will assess whether the feature will be added in future versions of the software.

Consultancy Request

If a support ticket involves configuration changes, it falls under the category of consultancy, and the ticket is assigned the type **Consultancy Request**.

3.6. Ticket updates

You can view your support tickets in **My Tickets**. You can also reply to the tickets there.

Alternatively, you can keep track of the tickets via email. You will automatically receive an email whenever there are updates to a ticket. You can reply to your ticket by replying to that email.

3.7. Support levels

There are three levels of support: 1st, 2nd, and 3rd level:

- 1st level: Initial contact via phone or the help desk; basic questions are handled by 1st-line support staff.
- 2nd level: A PLM Xpert specialist will handle the ticket.
- 3rd level: The ticket is transferred to the vendor (Revalize).

Users should initially direct their questions to the key users within your organization. The key users can then contact support.

4. Final note

That concludes this guide for you as a client of PLM Xpert. We appreciate your cooperation and trust that this helpdesk system will offer significant benefits to both you and us, while also increasing the efficiency with which your inquiries are handled.

Should you have any questions regarding how it works, or if you encounter any issues while using the system, please do not hesitate to contact us.

