

Contact Center Support for End Users

Cybergrants Webinar



Meet Your Trainer

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Sr. Training Specialist

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Learning Objective

To provide an understanding of the support experience you can expect with our Cybergrants Contact Center.

By the end of our webinar today, you should know who end users can contact for support, what the process looks like on the Bonterra side of things and what some common support inquiries are.

Agenda

Structure of the Contact Center team

Process for Routing Support Tickets

Common Support Inquiries

Structure of the Contact Center Team

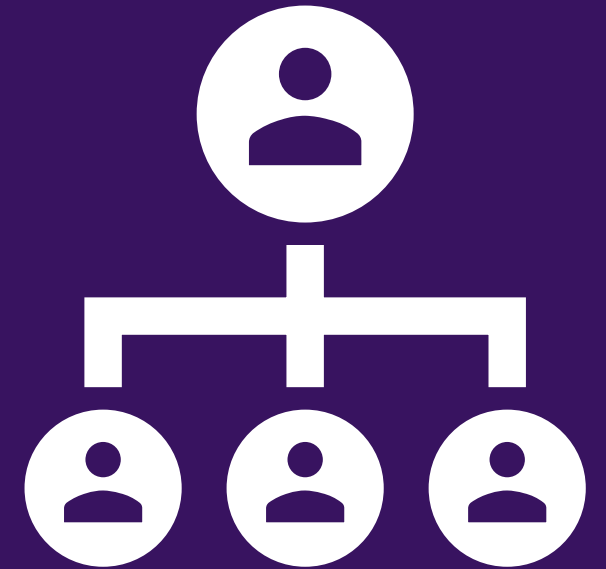
Structure & Availability

- Led by our Sr. Client Services manager
- Available to support both employees/donors and organizations with any product specific inquiries



Contact Center is available:

- Monday – Thursday: 8am-8pm EST
- Friday: 8am-5pm EST



Service Level Objectives (SLO)

- Our team works to meet the objectives outlined in our Service Level Agreement (SLA) when supporting end users
- These objectives aim to ensure our team achieves and exceeds your expectations!



FOR THE GREATEST GOOD.

Bonterra Customer Support Service Level Agreement

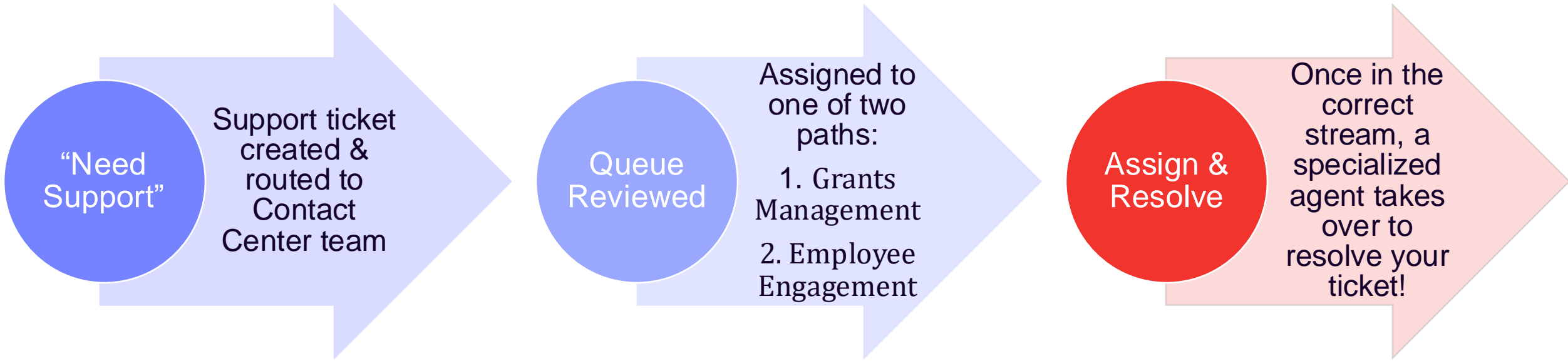
Find the Bonterra Customer Support SLA that governs all Bonterra Products after January 1, 2024.

[Review the Customer Support Service Level Agreement](#)



Incoming Support Tickets

“Need Support”



Support Queue

Unassigned Tickets - CG1

Filter

<input type="checkbox"/>	ID	Requested	Updated	Client	Subject	Requester	Contact Center Request Type
<input type="checkbox"/>	#2763474	30 minutes ago	30 minutes ago		Thanks for your email i		EG Request
<input type="checkbox"/>	#2763479	28 minutes ago	28 minutes ago		gift match		EG Request
<input type="checkbox"/>	#2763489	22 minutes ago	22 minutes ago		Support Request : How do I confirm a gift?		EG Request
<input type="checkbox"/>	#2763492	20 minutes ago	20 minutes ago				EG Request
<input type="checkbox"/>	#2763500	15 minutes ago	15 minutes ago		Support Request :		EG Request

Phone Calls

- Our team can also be contacted via phone call
- Support lines have been configured for your program and are routed to our live agents through partnership with Zendesk

Availability Reminder

Monday – Thursday: 8am-8pm EST

Friday: 8am-5pm EST

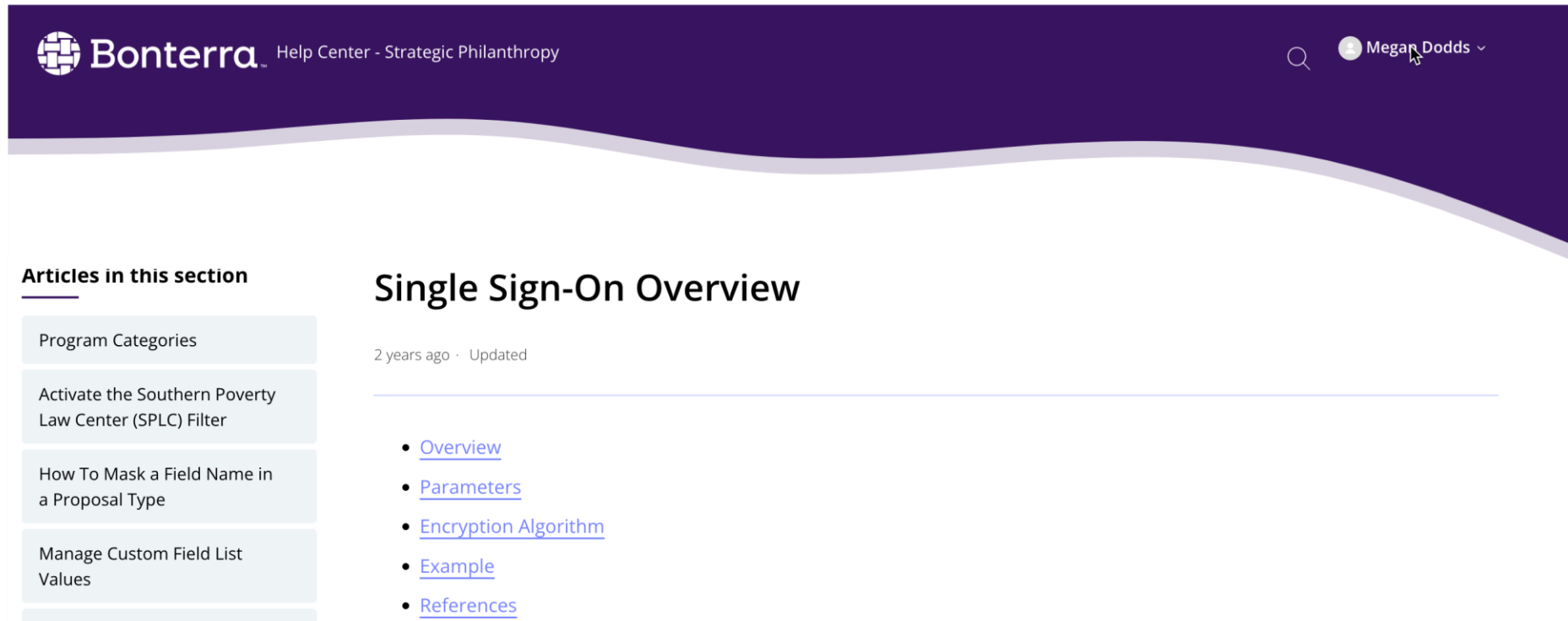


Common Support Inquiries

Login Assistance

Common request for support is around logging into the platform

Our team is always available to provide support, guidance and to troubleshoot staff needs around login issues, but you can help to mitigate tickets by enabling Single Sign On (SSO) for eligible end users to remove login barriers.



The screenshot shows the Bonterra Help Center interface. The header is dark purple with the Bonterra logo and 'Help Center - Strategic Philanthropy' on the left, and a search icon and user profile 'Megan Dodds' on the right. The main content area is white. On the left, there is a sidebar titled 'Articles in this section' with four items: 'Program Categories', 'Activate the Southern Poverty Law Center (SPLC) Filter', 'How To Mask a Field Name in a Proposal Type', and 'Manage Custom Field List Values'. The main article is titled 'Single Sign-On Overview' and is dated '2 years ago · Updated'. Below the title is a list of links: 'Overview', 'Parameters', 'Encryption Algorithm', 'Example', and 'References'.

Bonterra Help Center - Strategic Philanthropy

Megan Dodds

Articles in this section

- Program Categories
- Activate the Southern Poverty Law Center (SPLC) Filter
- How To Mask a Field Name in a Proposal Type
- Manage Custom Field List Values

Single Sign-On Overview

2 years ago · Updated

- [Overview](#)
- [Parameters](#)
- [Encryption Algorithm](#)
- [Example](#)
- [References](#)

Front Door

Organizations however are restricted from using SSO, and must use an email address and password.

To improve user experience, we recommend organizations use Front Door:

- Enhanced login process
- Allows NPO grantseekers access to most CG organization company portals from a single user account
- Info on Front Door can be accessed via the Help Center in your CG system

This application is hosted by CyberGrants on behalf of CyberGrants FrontDoor. CyberGrants has recently updated our Privacy Policy. [Learn More.](#)

FrontDoor
Powered by CyberGrants

[Register Your Organization](#) [Learn More](#) [Help](#)

CyberGrants

Developed with NPOs for NPOs.
Claim your organization. Get verified. Experience all of CyberGrants through a single FrontDoor.

First Time Users

Claiming your organization's FrontDoor profile gives your users one consolidated entry point for their CyberGrants experience, enhances security, and opens up a world of new features.
[Learn more about Cybergrants FrontDoor.](#)

[Register Today](#)

Note: Please make sure that you have electronic copies of your organization's IRS Letter of Determination and a canceled check image or financial statement available before you begin your application.

Existing Users

E-mail Address

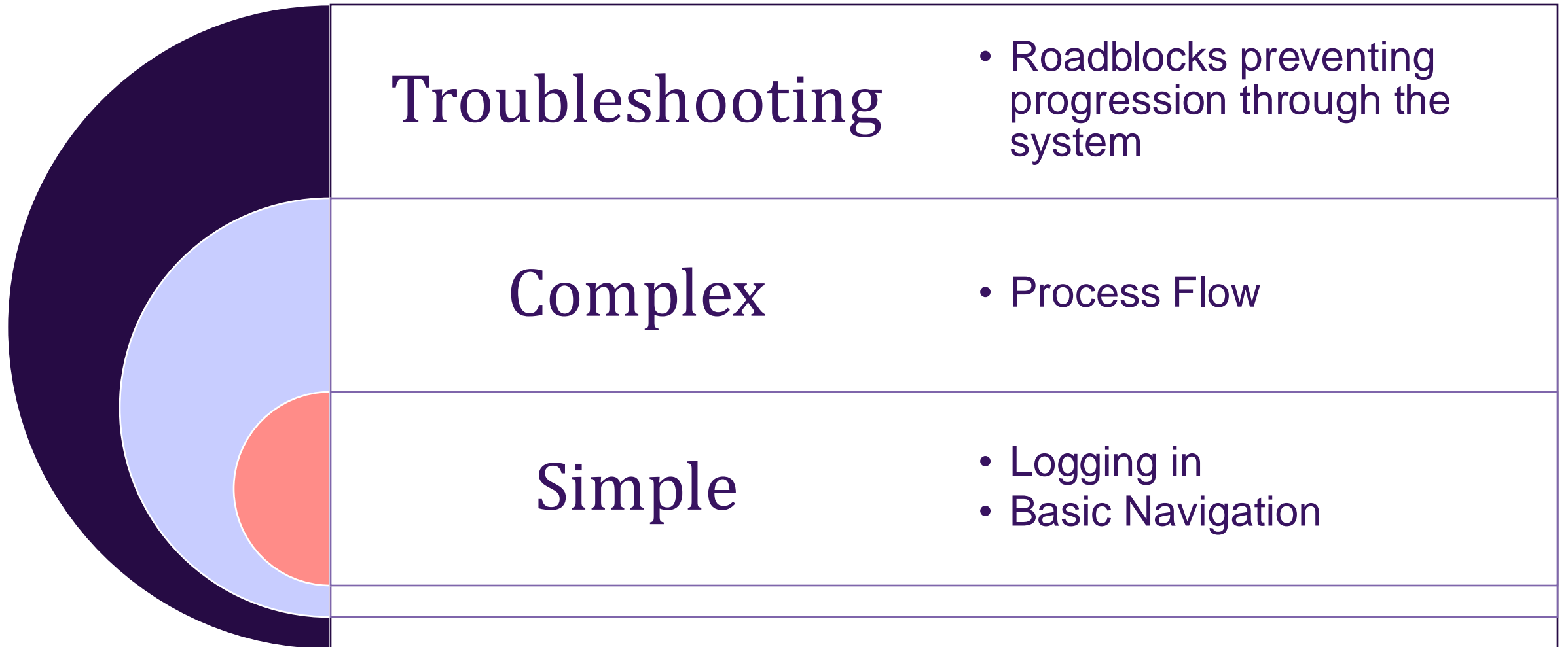
Password

[Show password](#)

[Log In](#)

[Forgot your password?](#)

Website Usage & Process Flow



Program Specific Guidelines

- Nuanced processes specific to each organization are best documented internally or built into FAQs hosted in the Support Areas within your platform
- This allows users to take initiative in answering organization specific questions and understanding your unique processes

Support Areas

To edit an existing support area, click on the corresponding support area.



Please note any changes made in this section cannot be published to production from this area and/or your corresponding proposal type pages.

Non-Profit Support Areas	Active?
How can I continue working on an application I already started?	<input type="radio"/>
How can I delete an application I no longer need?	<input checked="" type="radio"/>
How can I move between sections of the application without completing all req...	<input type="radio"/>
How can I print my application?	<input checked="" type="radio"/>
How can I see the application before I get started?	<input type="radio"/>
How can I update or delete a contact in my application?	<input type="radio"/>
How do I delete an unloaded file?	<input type="radio"/>

Additional Resources

- Help Center accessible from the top right hand user badge in CyberGrants

Additional Training Opportunities

- On-demand Videos available in our [Bonterra Academy](#)
- Additional webinars and training content to come!

Thank you for attending!

We hope to see you
in future trainings.