

# Zendesk OCX Support User Guide

**OCEAN<sup>X</sup>**  
RECURRING REVENUE. DELIVERED.™

The screenshot displays the OceanX Support portal. At the top, the OceanX logo is followed by the tagline "The final mile is your first impression...". Navigation links for "Community", "Submit a request", "Sign in", and "MENU" are visible in the top right. The main heading reads "Welcome to OceanX Support". Below this is a search bar with the placeholder text "Type your question here..." and a "Search" button. Two primary content cards are featured: "Getting Started" with a user icon and text about self-registration, and "Announcements" with a document icon and text about system updates. At the bottom, a dark banner contains "Community" and "Submit a request" buttons.

# What is Zendesk OCX Support?



- All-in-One portal for client requests (replacing Harbor)
- Direct line into several OceanX teams including Warehouse Operations, Business Intelligence, Service Delivery, and Command Center
- Evolution of the Service Desk and Command Center portals currently leveraged by clients
- Efficient solution for getting what you need from OceanX

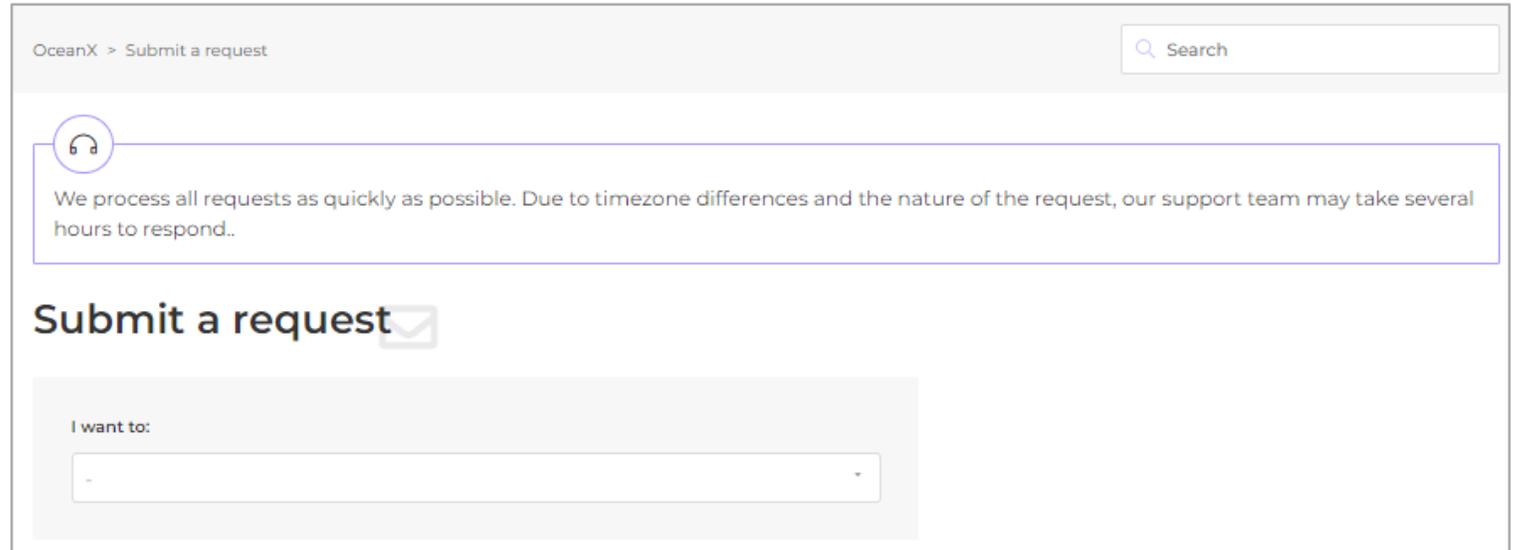
# How Do I Access Zendesk OCX Support?



- [help.oceanx.com](https://help.oceanx.com)
- From here you can self-register your account with OCX Support
  - Submit requests
  - Track requests and follow-ups
- Requests can be submitted without registering, but you won't be able to track them



# What Can I Do In Zendesk?



- Contact an OCX representative
- Submit a technical issue or QC question
- Submit an Inventory transfer or update
- Update BOM Details
- Submit WOs or Special Order requests
- And more!

# Ticket Creation Best Practices



- Put plenty of detail into the title – use keywords for ease of Search feature
- Include other users who you want updated on the ticket – separate their email addresses with a semi-colon
- Fill out all required fields (\* marked are required) - put in “N/A” if you’re unsure
- Optional fields should be filled in whenever possible for full detail
- Include attachments to provide evidence/reference for your request
- Next let’s talk about some common items ➔



# Contact an OCX Representative

- Use for any general request or if you are unsure of what type of request to submit for your inquiry
- Make sure to include as much detail as possible on what is needed/desired to satisfy your inquiry

I want to:

Contact an OceanX Representative

CC (optional)

Add emails

Contact Phone Number (optional)

10-digit phone number required; parenthetical, point, dash, and empty formats accepted.

Additional Email Addresses (optional)

Is there anyone else you would like us to contact about this request? (Emails separated by commas)

Title\*

Please provide a brief subject line for your request

Description\*

T B I | ☰ ☷ | 📎 🗑️ 📧

Please provide details about your request. Clarity and focus helps minimize response time.

Attachments (optional)

Add file or drop files here

Submit



# Submit a Technical Issue

- Use for reporting technical issues with using OCX systems
- System failures, error codes/messages, unusual behavior, reporting issues, etc.
- Always be clear on the area of impact and include full details of what was done leading up to the issue

I want to:

Submit a Technical Issue

CC (optional)

Add emails

Additional Email Addresses (optional)

Is there anyone else you would like us to contact about this request? (Emails separated by commas)

Priority (optional)

Request priority

Impacted Area (optional)

Indicate in which system(s), service(s), channel(s), etc. relate to your request

Title\*

Please provide a brief subject line for your request.

Description\*

Please provide details about your request. Clarity and focus helps minimize response time.

Attachments (optional)

Add file or drop files here

# Submit a QC Issue

- Submit Quality Issues related to DTC or B2B Shipments, include photos
- When Possible, upload multiple orders into one ticket using a .xlsx file
- Please specify desired outcome (i.e. results of investigation, credit request, etc.)

I want to:

Submit a QC Issue

CC (optional)

Add emails

Additional Email Addresses (optional)

Is there anyone else you would like us to contact about this request? (Emails separated by commas)

Type of QC Issue (optional)

Please select all that apply

Title\*

Please provide a brief subject line for your request.

Order Number (optional)

Provide any impacted order number(s) if available

Customer Order Date (optional)

Please provide the date the order was placed by the customer

Customer Issue Reported Date (optional)

Please tell us when the recipient reported the issue to you

Item Code(s) (optional)

Please provide item code(s) that appear on orders sent to CozenX

Lot Code(s) (optional)

Please provide any specific lot code(s) for each item code.

Item Description (optional)

Please provide any details specific to the item code(s) above.

Item COGs (optional)

Please use a dollar sign and no commas, cents optional after a decimal

Description\*

Please provide details about your request. Clarity and focus helps minimize response time.

Attachments (optional)

Add file or drop files here

Submit

# Submit an ASN

- Submit an Advanced Shipping Notice (ASN) manually for upcoming delivery
  - Make sure a delivery appointment has been scheduled
  - Please make sure you have reviewed the ASN training guide
- Always include ASN file as an attachment; manual template can be provided if needed
- Please provide all available details regarding expected delivery

I want to:

Submit an Advanced Shipping Notice

CC (optional)

Add emails

Additional Email Addresses (optional)

Is there anyone else you would like us to contact about this request? (Emails separated by commas)

Title \*

Please provide a brief subject line for your request.

Planned Delivery Date (optional)

Please provide the delivery date for the shipment.

Planned Delivery Time (optional)

HHMM, 24-hour time of day format (4AM = 04:00, 4 PM = 16:00)

Facility to Receive ASN (optional)

Please select the facility to receive the ASN

Total Number of Pallets/Cartons (optional)

Please provide total quantities of each container type

Description \*

T B I | | | | |



# Submit a Fulfillment Request

- Click the appropriate request in the “I want to:” drop menu.
  - The form will update to provide the appropriate fields.
  - Contact us toll-free at (877) 558-7797 if you need assistance with submitting any of these requests →
- ❖ Submit an inventory transfer or status update
  - ❖ Update BOM details (new SKU, modification/swap, packout guides)
  - ❖ Submit a Work Order
  - ❖ Submit a Special Order Request
  - ❖ Add or Remove a B2B trading partner integration
  - ❖ Request a Logistics Update (postage analysis, ship matrix, carrier info, etc.)
  - ❖ Request support for a LogicBroker order

# Monitor Your Tickets in One Place

**OCEAN<sup>X</sup>**  
RECURRING REVENUE. DELIVERED.™

The screenshot shows the OceanX Support portal. At the top, the logo "OCEAN<sup>X</sup>" is followed by the tagline "The final mile is your first impression...". Navigation links include "Community", "Submit a request", and a user profile for "Zachary Rhodarmer" with a dropdown menu. The dropdown menu contains "Profile", "Requests" (highlighted with a red box), "Activities", and "Sign out". The main content area has a purple header with "Welcome to OceanX Support" and a search bar with the placeholder "Type your question here...". Below the search bar are two white boxes: "Getting Started" with a person icon and text about self-registering, and "Announcements" with a person icon and text about down-time notices. At the bottom, there are two buttons: "Community" and "Submit a request".



# Finding Your Requests

- At the top right, click on your name
- Select the option for Requests

The screenshot displays the OceanX Support website interface. At the top left, the OceanX logo is followed by the tagline "The final mile is your first impression...". To the right of the logo are navigation links for "Community" and "Submit a request", and a user profile for "Zachary Rhodarmer" with a dropdown arrow and a "MENU" icon. The user profile dropdown menu is open, showing options for "Profile", "Requests" (highlighted with a red box), "Activities", and "Sign out". Below the navigation bar, a large purple banner contains the text "Welcome to OceanX Support" and a search bar with the placeholder "Type your question here..." and a "Search" button. Below the banner, there are two white cards: "Getting Started" with a person icon and text about self-registering, and "Announcements" with a person icon and text about down-time and mailing lists. At the bottom, there are two buttons: "Community" and "Submit a request".



# Monitoring Your Requests

Requests Contributions Following

## My requests

My requests Requests I'm CC'd on Organization requests

Search requests

Status: Any

Subject	Id	Created	Last activity ▼	Status
Testing	#136	1 hour ago	1 hour ago	solved

- Each of your requests has its own line
  - Subject (Title)
  - ID (ticket #)
  - Created time
  - Last Activity time
  - Current Status
- To open a ticket, click on the Subject
- You can filter your list by Status, and you can search for keywords
- You can also view requests you are copied on, and all requests for your organization by clicking on those tabs



# Working Your Requests

## Testing

 Zachary Rhodarmer  
1 hour ago

Testing

 CC Add emails

T B I | ☰ ☷ | 📎 🔗 📧 🗑️

Add file or drop files here

Submit

Requester	Zachary Rhodarmer
Created	Today at 10:51
Last activity	Today at 10:54
Assigned to	Zachary Rhodarmer
Id	#136
Status	<b>solved</b>
Priority	—
Contact Phone Number	—
Additional Email Addresses	—

- Once open, you will see the details of your ticket displayed in full
- Updates/messages from OCX representatives will be listed in chronological order
- Click on the option to “Add to conversation” and you will see a message field where you can type responses and add additional attachments
- Once you are ready, click Submit to add your notes to the ticket and a notification will be sent to the OCX rep assigned