



Ask ISO User Guide

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Introduction

Welcome to Ask ISO, the ISO New England customer support community. The instructions in this guide reflect the new Ask ISO system introduced in 2018, which was built on the Salesforce Service Cloud platform.

Ask ISO includes the following features:

- If you are a prospective customer or a customer not in registered in the Customer and Asset Management System (CAMS), you can now register for an account and submit a case (previously called “issue”) directly using self-service. You no longer need to submit by phone or email.
- Digital certificates are not required for this application. Access to the Ask ISO application is managed by a username and password.
- Phone calls associated with an open Ask ISO case route directly to the analyst assigned to the case, when they are available. Ask ISO automatically integrates email and phone communications.
- Knowledge articles are provided in Ask ISO for easy access to frequently asked questions.
- You can view all of your past and current cases under one username even if you are listed in the CAMS under more than one company.

The recommended browsers for Ask ISO are Google Chrome and Mozilla Firefox. Internet Explorer is supported but not recommended. For more information regarding browser support, see the [Browser Support for Communities](#) article in the *Help* section on the Salesforce Trailblazer Community site.

Registering for Ask ISO

There are three ways to register for Ask ISO.

Customer Asset Management System (CAMS) and Salesforce Integration

If you are already listed in CAMS for a company, you will automatically be registered in Ask ISO. When your Security Administrator adds a user to CAMS, that user will be able to submit cases under that specific customer (customer names are also referred to as account names). If the email address used for your profile is the same under each customer in CAMS, then you will be able to submit and view all of your own cases under a single community user.

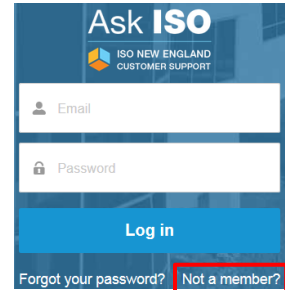
In order for you to view all of the cases associated with your company, you need an elevated permission called *External Manager*. The Security Administrator must add the role of *Ask ISO / External Manager* under *Application Groups* in CAMS for you. This elevated permission is set on a customer level by a Security Administrator. If you need to be able to see cases across multiple customers, a Security Administrator for each of the market participants will need to grant you the *External Manager* role under each Market Participant.

Self-Registration

You can register yourself for Ask ISO. You will only need to register if you are not affiliated with a company listed in CAMS.

To register for Ask ISO:

1. Go to <https://askiso.force.com>.
2. Click **Not a member?**
3. Enter your **First Name, Last Name, Email, Phone, Title, Company Name**, and a **Password**. Be sure to select **I'm not a Robot** and complete the Captcha requirement.
4. Click **Sign up**. You will receive an email that confirms your registration to Ask ISO.



Registration by Customer Support

When you submit a case to Customer Support by phone or email (e.g., custserv@iso-ne.com), Ask ISO automatically creates a contact for you. You may request to have community access enabled by replying to your case email. If you are subsequently added to CAMS with the same email as in the Ask ISO profile, the profiles will synchronize. This will enable you to submit cases under the company listed in CAMS.

Logging in

After you have registered, you can log in to Ask ISO.

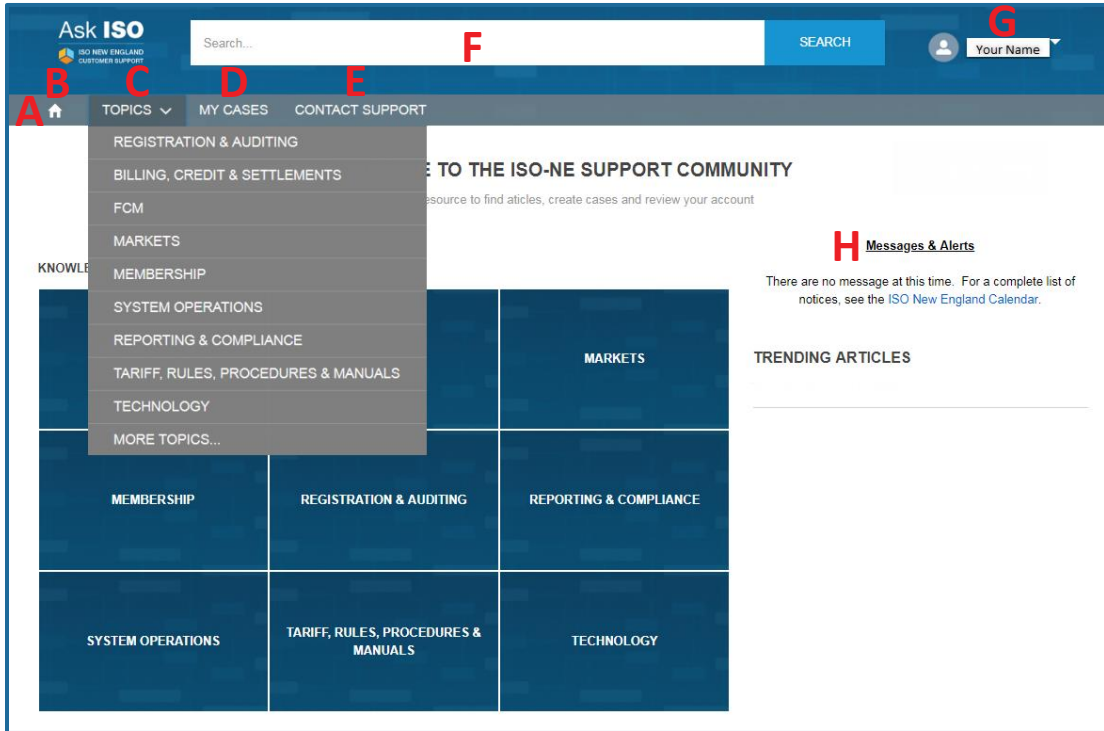
To log in to Ask ISO:

1. Navigate to <https://askiso.force.com>.
2. Enter your email and password.
3. Click **Log in**.

If forgot your password, click **Forgot your password?** This sends a password reset link to your email.

Ask ISO Home Page Features

After you log in, you are taken to the Community page which provides links to common areas as well messages and articles.



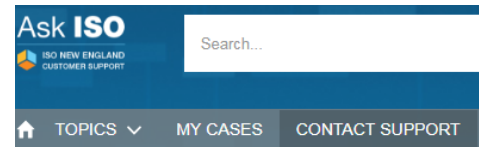
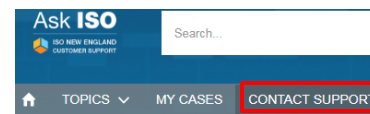
A	Tool bar —Contains menus and links to many of the areas in Ask ISO.
B	Home —Returns you to the Community home page from anywhere within Ask ISO.
C	Topics (Knowledge Articles) —Provides answers to commonly asked questions and concerns. It is categorized by main topics. You can select a topic from the tool bar dropdown, or select a topic from the tiles on the home page.
D	My Cases —Lists all cases, past and present. If you are an Ask ISO External Manager (an elevated permission given by your Security Administrator), you will be able to see all of the cases for your company, regardless of who submitted the case.
E	Contact Support —Links to the page where you can submit a case to Customer Support.
F	Search —Searches Knowledge Articles and cases by keyword, topic, or case number.
G	<p>Manage Your Account—Provides a menu of options and links:</p> <ul style="list-style-type: none"> • Home—Returns you to the Community home page from anywhere within Ask ISO. • My Profile—Enables you to edit your name and photo, which displays to Customer Support only. • My Settings—Enables you to edit your email, preferred location, time zone, profile visibility, and email notifications. • Contact Support—Links to the page where you can submit a case to Customer Support. • My Account—Enables you to view your account details. • Logout—Ends your Ask ISO session.
H	Messages & Alerts —Displays your latest messages and alerts and provides a link the ISO Calendar.

Contacting Support – Submitting a Case

When you have an issue or question you can submit a case to Customer Support.

To submit a case to Customer Support:

1. Click **Contact Support** on the Ask ISO Tool bar.
2. Enter the following information on the case form:
 - **Account Name**—Select the appropriate customer for your inquiry. This field shows your name by default. Search for the company name or customer ID before submitting the case so that Support can associate your case to the correct company.
 - **Subject**—Provide a brief summary of your issue.
 - **Category**—Select from the drop-down menu. This helps to route your inquiry to the appropriate group:
 - **General Customer Support**—Questions related to settlements, billing, outages & system operations, technical support (including digital certificates), training and ISO-TEN, day-ahead market, real-time market, FTRs, forward capacity market (including resource transfers), and the tariffs.
 - **Critical Energy Infrastructure Information**—Questions related to obtaining information classified as CEII for PAC, RC, or transmission planning. Use this category when submitting a CEII form.
 - **Membership**—Questions related to becoming a market participant, submitting a *Forward Capacity Market Non-Market Participant Registration Request*, or terminating membership.
 - **Registration & Auditing**—Questions related to claimed capability auditing or registering an asset.
 - **Needed By**—Enter a **Date** or select a date by using the calendar icon if your case is time sensitive. You can also enter a **Time** or select a time by using the time icon. For asset registration form submittals, please enter the requested effective date of the registration. Make sure to allow for the required number of business day notice as defined in the M-RPA.
 - **Description**—Enter a detailed description of the case. This helps enable prompt resolution of the issue by minimizing the need to contact you for clarification or additional information.



SUBMIT A CASE TO CUSTOMER SUPPORT

ACCOUNT NAME

*SUBJECT

*CATEGORY

--None--

NEEDED BY

Date

Time

*DESCRIPTION

[Add Attachment](#)

- (Optional) Click **Add Attachments** to add an attachment to the case. Browse and select the file you want to upload. The following file types are accepted: .pdf, .bmp, .tif, .tiff, .gif, .png, .jpg, .jpeg, .html, .vsd, .csv, .xls, .xlsx, .xml, .doc, .docx, .txt, .zip, .zipx, .ppt, .pptx.

Note: With the initial case creation, you are only allowed one attachment. To add additional attachments, see [adding attachments](#).

- Click **Submit** when finished. You will receive an acknowledgement email from custserv@iso-ne.com providing the case number and a courtesy link back to the case in the community.

Required fields are marked with an asterisk (*). If you do not provide all of the required information, Ask ISO will prompt you to review the errors on the page, fix them, and submit again.

Next to the *Submit a Case* form on the *Contact Support* page, is a list of suggested articles. As you type the **Subject** on the form, Ask ISO searches for Knowledge Articles and displays links to ones that might be helpful. Click an article to read it. The article overlays the *Contact Support* page.

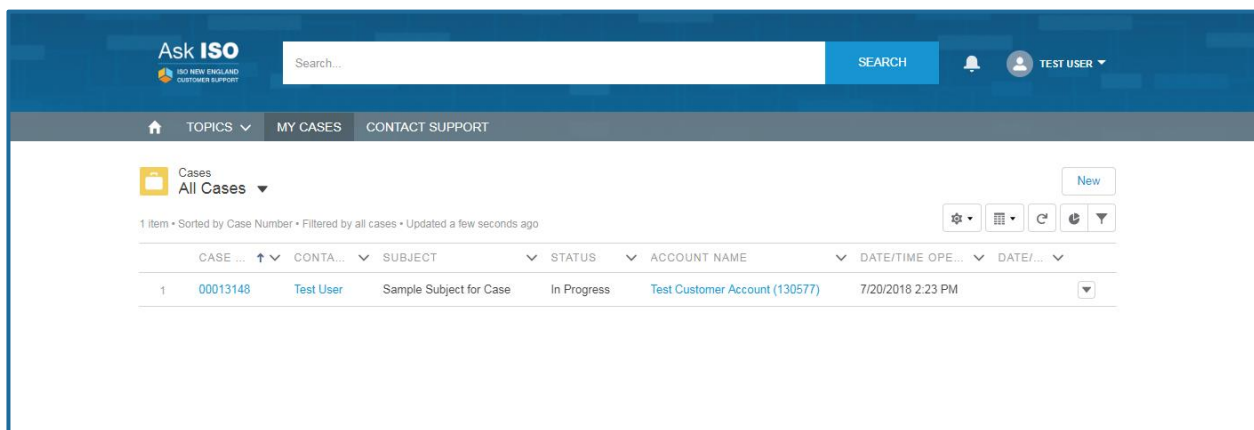
YOUR ANSWER MIGHT BE IN THESE ARTICLES.

- Will market participants be notified of a capacity scarcity condition (... Jul 16, 2018
- Customer and Asset Management System (CAMS) and Digital Certi... Jul 16, 2018

Monitoring and Updating Your Cases

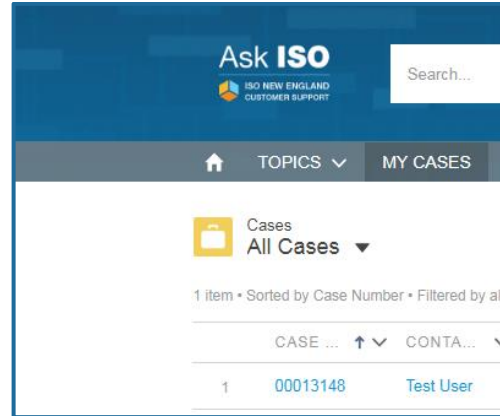
Click **My Cases** in the Tool bar to see your case list. On your *My Cases* page, you can see a list of cases, with their corresponding Case Number, the Contact Name (who submitted the issue), the Subject, and the current Status of the case. To view the details of a case, click a case number. When you select a case, you can attach files to it.

An automated email from custserv@iso-ne.com is sent when a case is resolved. The email includes the case number, summary/subject, the solution as logged in Ask ISO, and a courtesy link back to the case in the community.

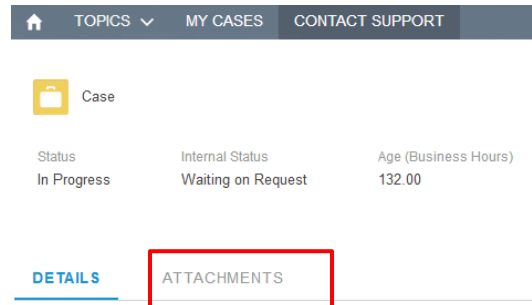


To add attachment(s):

1. Click **My Cases** on the Ask ISO Tool bar.
2. Click a case number on the *My Cases* page.

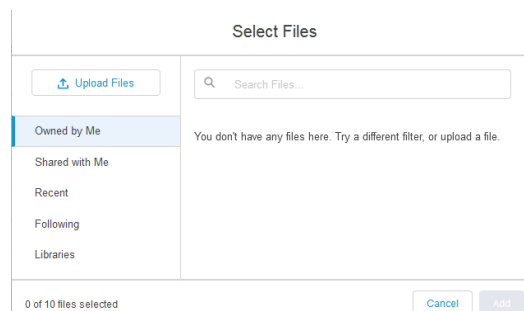
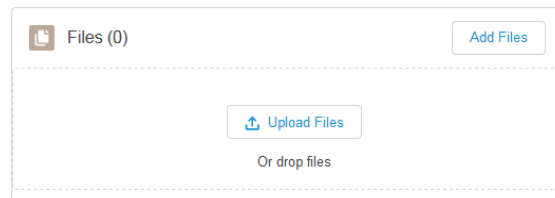


3. Click the **Attachments** tab. The following file types are accepted: .pdf, .bmp, .tif, .tiff, .gif, .png, .jpg, .jpeg, .html, .vsd, .csv, .xls, .xlsx, .xml, .doc, .docx, .txt, .zip, .zipx, .ppt, .pptx.



4. Scroll to the *Files* area to attach a file. There are two methods for file attachment:

- Click **Upload Files** and the *File Upload* dialog box opens. Use the dialog box to browse for new files to add to Ask ISO. You can also drag and drop files into the *Files* area.
- Click **Add Files** and the *Select Files* dialog box opens. Use this dialog box to upload documents that you previously uploaded to Ask ISO. Click **Add** to attach the file to the case.



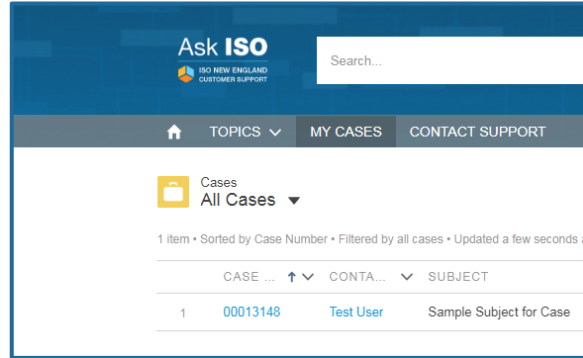
When the file is successfully uploaded, you will receive a confirmation banner.

Sending a Message to Your Analyst

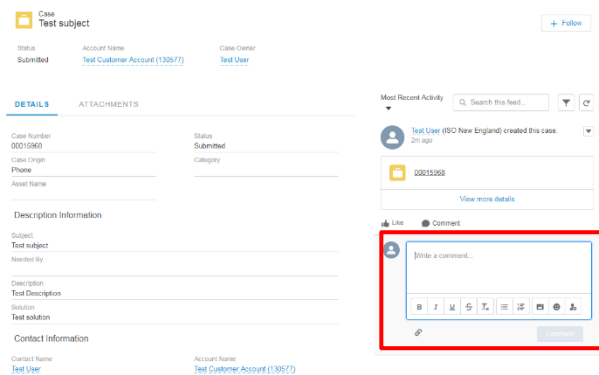
Each case is assigned an ISO analyst. You will receive an email notification automatically when your case is submitted and again when the case is resolved. You can contact your case analyst on the *Case* page.

To send a message to the assigned analyst for your case:

1. Click **My Cases** on the Ask ISO Tool bar.
2. Click a case number on the *My Cases* page.



3. Type a comment in the **Write a comment** text box. The analyst assigned to your case will receive the comment. You can add an attachment to the comment by clicking the paperclip beneath the text box.



Glossary

Account—Salesforce term for a customer. For market participants or other ISO customers, the account corresponds to the customer (and customer ID) maintained in CAMS.

Case—Replaces the term “Issue” used in the previous Ask ISO system.

Knowledge Article—Provides answers to commonly asked questions and concerns.