



Customer Portal User's Guide

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Customer Portal User's Guide

Introduction

Introduction

The Digi Customer Portal provides a secure way for you to obtain information about your Digi products. This information includes details about support cases, product change notifications, purchase history, return authorizations (RAs), account status, and product warranties. In addition, the Customer Portal provides access to the support resources and the Knowledge Database.

Register for Access to the Customer Portal

To register for access to the Customer Portal:

1. Go to my.digi.com.
2. Under New Customer, type values for the following fields:
 - **First Name**
 - **Last Name**
 - **Company**
 - **Email Address**
 - **Password**
3. In the **Re-Enter Password** field, retype your password to confirm.
4. Click **Create Account**. Log in with your user name and password.

Log In | Register

The screenshot displays two side-by-side panels for user authentication. The left panel, titled 'Returning Customer', prompts the user to login with an existing account. It features a 'Required *' label, an 'Email Address *' field containing 'your@email.com' with a red error message 'Valid Email is required' below it, and a 'Password *' field. A green 'Log In' button and a 'Forgot password?' link are at the bottom. The right panel, titled 'New Customer', prompts the user to create an account. It includes a 'Required *' label, fields for 'First Name *', 'Last Name *', 'Company *', 'Email Address *' (containing 'your@email.com'), 'Password *', and 'Re-Enter Password *'. A green 'Create Account' button is at the bottom. A note below the email field states: 'We need your email address to contact you about your order.'

Manage Cases

A case is the record by which you communicate with Digi about a product problem and obtain a solution. The Customer Portal enables you to monitor past and present cases. You can also submit a new case. To assist you with internal reporting needs, you can export the case list to a comma separated values (CSV) file for use in spreadsheet applications.

You can manage your cases with the following tasks:

- [View Case List](#)
- [View Case Details](#)
- [Export Case List](#)
- [Create a New Case](#)

View Case List

To view your case list, select **Cases > Support Cases**. You can filter the list by case status. You can sort the case list by case number, creation date, or last message date in ascending or descending order. From the case list, you can do the following:

- To view case details, click the case number (see [View Case Details](#)).
- To export the case list to a CSV file, click **Export** (see [Export Case List](#)).
- To create a new case, click **Create New Case** (see [Create a New Case](#)).

The screenshot shows the 'Support Cases' interface. At the top right, there are two green buttons: 'Create New Case' and 'Export'. Below these buttons, there are two filter controls: a dropdown menu labeled 'Show All Statuses' and a sort control with an upward arrow icon and the text 'by Case number'. A red box highlights these two filter controls. Below the filters is a table with the following columns: Case No., Subject, Creation date, Last Message, Case Type, and Status. The first row of the table has 'Case #351601' highlighted with a red box. The table contains three rows of case data.

<u>Case No.</u>	<u>Subject</u>	<u>Creation date</u>	<u>Last Message</u>	Case Type	Status
Case #351601	Fl;kasdf,lkjq34598u2346p98y2364897 test this	8/9/2021	8/9/2021	Open a Support Case	Pending Digi
Case #351600	Testing Message Preference	8/6/2021	8/6/2021	Open a Support Case	Pending Digi
Case #351598	test	7/28/2021	7/28/2021	RA Request	Closed

View Case Details

The case details include the type of request, product type, the product, the case status, the case creation date, and the date of the last message.

The screenshot shows a user interface for viewing case details. At the top right, there is a user greeting: "Welcome Digi International HQ" with a dropdown arrow. On the left, the case ID is displayed as ".6326306". The main heading for the case is "Case #351601: Fl;Kasdf;Lkjq34598u2346p98y2364897 Test This". Below this, there are three lines of metadata: "Type of request: Open a Support Case", "Product Type: Cellular/Transport", and "Product: ConnectPort WAN GPS". On the right side, there is a status section: "Status: Pending Digi", "Creation date: 8/9/2021", and "Last Message: 8/9/2021". At the bottom right, there is a green button labeled "Close Case".

A message log that contains a record of your correspondence with Digi follows the case details. To reply to a message:

1. Click the **Reply with a message** field, and then type your message.
2. To attach supporting files, click **Choose Files**, select the file you want to attach, and then click **Open**. Valid file types include TIFF, JPG, JPEG, GIF, PJPEG, TXT, PDF, ZIP, BIN, DOC, DOCX, XLS, XLSX, PPT, and PPTX.
3. Click **Submit**.

The screenshot shows the "Reply with a message" form. At the top, it says "Reply with a message:" followed by a large, empty text input field. Below this is the "Attach Files" section, which includes a "Choose Files" button and the text "No file chosen". Underneath, there is a list of valid file types: "Valid file types are: tiff, tif, jpg, jpeg, gif, bmp, pjpeg, png, txt, pdf, zip, bin, doc, docx, xls, xlsx, ppt, pptx". At the bottom left of the form, there is a green button labeled "Submit".

Export Case List

To export the current case list to a CSV file, sort and filter the case list, and then click **Export**. The Customer Portal creates the CSV export file in your *Downloads* folder and presents a link in the lower left part of your screen.

The screenshot shows the 'Support Cases' interface. At the top right, there is a user greeting: 'Welcome Digi International HQ'. Below this, the title 'Support Cases' is displayed. To the right of the title are two buttons: 'Create New Case' and 'Export'. The 'Export' button is highlighted with a red rectangular box. Below the buttons are two dropdown menus: 'Show All Statuses' and a sort dropdown set to 'by Case number'. Below these elements is a table with the following data:

<u>Case No.</u>	<u>Subject</u>	<u>Creation date</u>	<u>Last Message</u>	<u>Case Type</u>	<u>Status</u>
Case #351601	Fl;kasdf;lkjq34598u2346p98y2364897 test this	8/9/2021	8/9/2021	Open a Support Case	Pending Digi

Create a New Case

To create a new case:

1. Click **Create New Case** from the case list, or select **Cases > Create New Case** from the menu.
2. Under *How Can We Help You*, type values in the following fields:
 - **Subject:** Type a descriptive title for the case.
 - **Type of Request:** Select one of the following case request types:
 - **Open a Support Case:** Request to open a support case.
 - **RA Request:** Request for a product return authorization (RA).
 - **Report a Bug:** Request to report a bug.
 - **Type of Product:** Select your product type.
 - **Select Product:** Select your product.
 - **Message:** Type a detailed message describing the nature and symptoms of the problem.

The screenshot shows a form titled "How Can We Help You?". It includes several required fields: "Subject", "Type of Request", "Type of Product", "Select Product", and "Message". Each field has a dropdown menu or a text input area. Below the "Message" field, there is a checkbox labeled "I want to use another email address for this case". At the bottom, there is an "Attach Files" section with a "Choose Files" button and a "No file chosen" message. A footer note lists valid file types: tiff, tif, jpg, jpeg, gif, bmp, pjpeg, png, txt, pdf, zip, bin, doc, docx, xls, xlsx, ppt, pptx.

3. To direct correspondence to an Email address other than your Customer Portal user name, select the **I want to use another email address for this case** check box. In the **Email** field, type the alternate Email address.
4. To attach a file to your case request, click **Choose Files**, navigate to and select the file you want, and then click **Open**. Valid file types include TIFF, JPG, JPEG, GIF, PJPEG, TXT, PDF, ZIP, BIN, DOC, DOCX, XLS, XLSX, PPT, and PPTX.
5. Click **Submit**.

Manage Support Resources

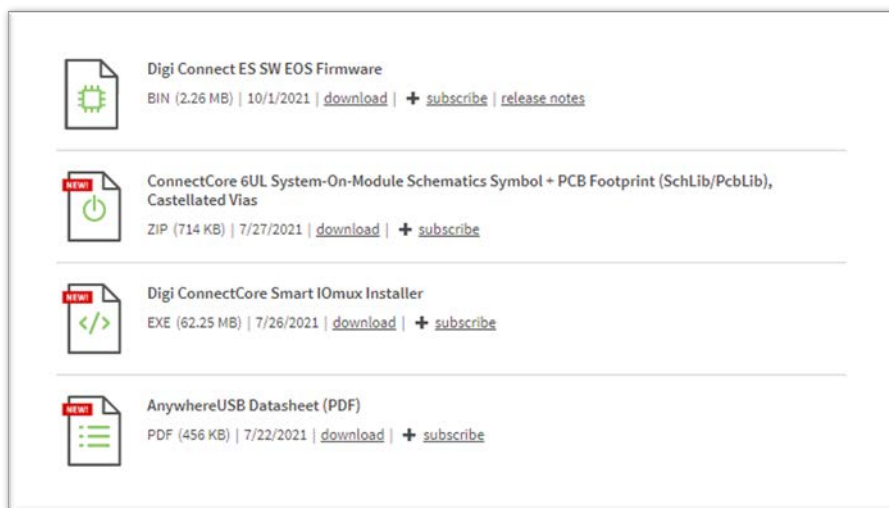
Support resources from the Digi website, such as reference documents and software updates, are available on the Customer Portal under **My Support Resources**. From here, you can download resources to your workstation and subscribe to resource updates. For resources that have them, release notes are also available for download.

To access support resources on the Digi website:

1. Select **My Support Resources > Find Support Resources**.
2. In the Find Support Resources page, click **All Resources** to filter the resource list by resource type. To sort the list, click **sort by**, and then select an option. To search for a title or content within the resource, type key words in the search field.



3. Choose the resource to add to the My Support Resources page, then select from the following:
 - **download**: Downloads the resource to your workstation.
 - **+ subscribe**: Adds the resource to the My Support Subscriptions page and subscribes to future updates. The Portal adds **NEW!** to the resource to alert you of an update.
 - **release notes**: Downloads the release notes to your workstation.

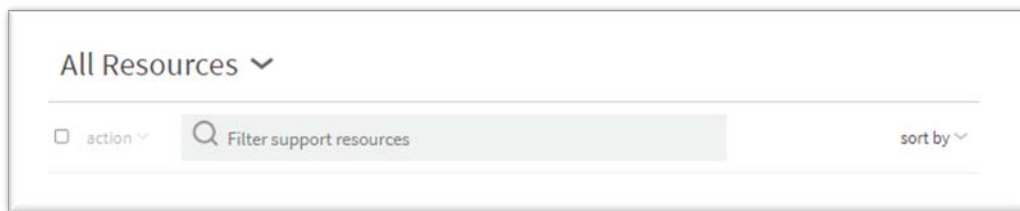


To access your subscribed resources:

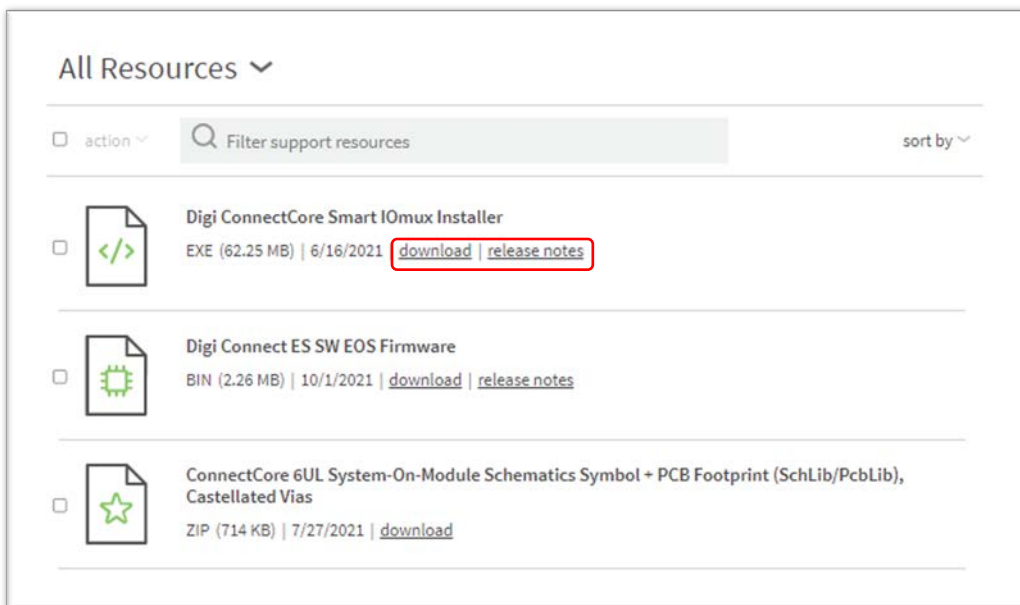
1. Select **My Support Resources > My Support Subscriptions**.
2. In the My Support Resources page, click **All Resources** to filter the resource list by resource type. To sort the list, click **sort by**, and then select an option. To search for a title or content within the resource, type key words in the search field.

The Portal marks updated resources with **NEW!**. To remove this alert:

- a. Choose a resource, and then select the **Action** check box.
- b. Click the **action** column head, and then select **Clear Alerts**.

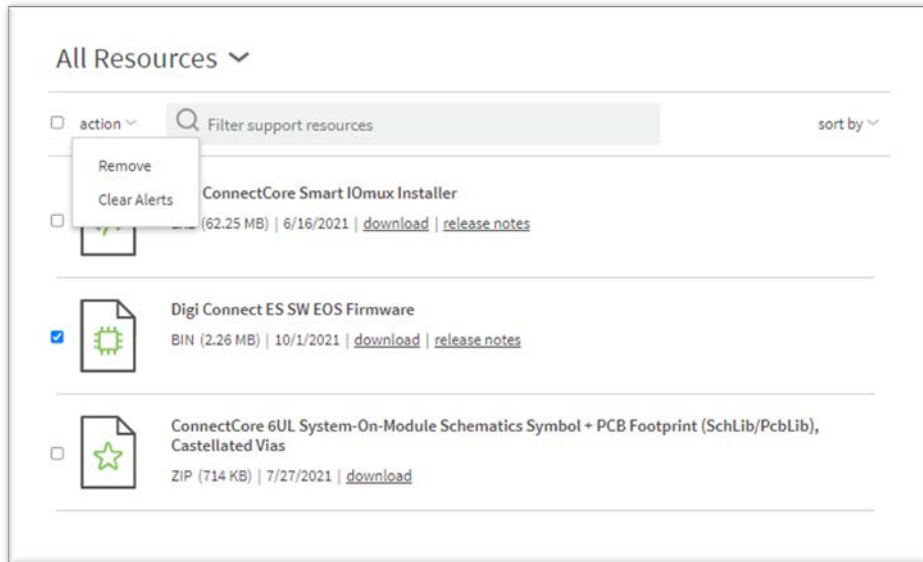


3. Choose the resource to download to your workstation, then select from the following:
 - **download**: Downloads the resource to your workstation.
 - **release notes**: Downloads the release notes to your workstation.



To remove a subscribed resource:

1. Select **My Support Resources > My Support Subscriptions**.
2. Choose a resource, and then select the **Action** check box.
3. Click the **action** column head, and then select **Remove**.






Access the Knowledge Database

To access the knowledge database, select **Knowledge Base**.



View Product Change Notifications

To view your product change notifications (PCNs), select **Product Change Notifications**. You can filter the PCN list by one or more notice types. To view a PCN, click the PCN title.

Filter by 		 Search Product Change Notifications	
Title	Date 	Type	
» PCN 210728-02 Product EOL Notice 191022-01 AnywhereUSB FOR FUN	7/28/2021	End of Life Notice	
» PCN 210728-01 Digi Connect Sensor+	7/28/2021	End of Life Notice	
» PCN 210727-02 Digi Connect Sensor+	7/27/2021	General Product Notice	
» Product EOL Notice 191022-01 AnywhereUSB 5,5M,14	7/27/2021	End of Life Notice	
» Digi Connect Sensor+	7/27/2021	End of Life Notice	
» Digi Connect Sensor+	7/20/2021	General Product Notice	
» Digi Connect Sensor+	7/20/2021	General Product Notice	
» Digi Connect Sensor+	7/20/2021	General Product Notice	
» Digi Connect Sensor+	7/20/2021	General Product Notice	

View Purchases and Return Authorizations

You can view your purchases and RAs with the following tasks:

- [View Purchase History](#)
- [View Purchase Details](#)
- [View Return Authorization List](#)
- [View Return Authorization Details](#)

View Purchase History

To view your purchase history, select **Purchases > Purchase History**. You can filter the purchase list by open orders and date. You can sort by purchase date, sales order number, or amount in ascending or descending order. From the Purchase History, you can do the following:

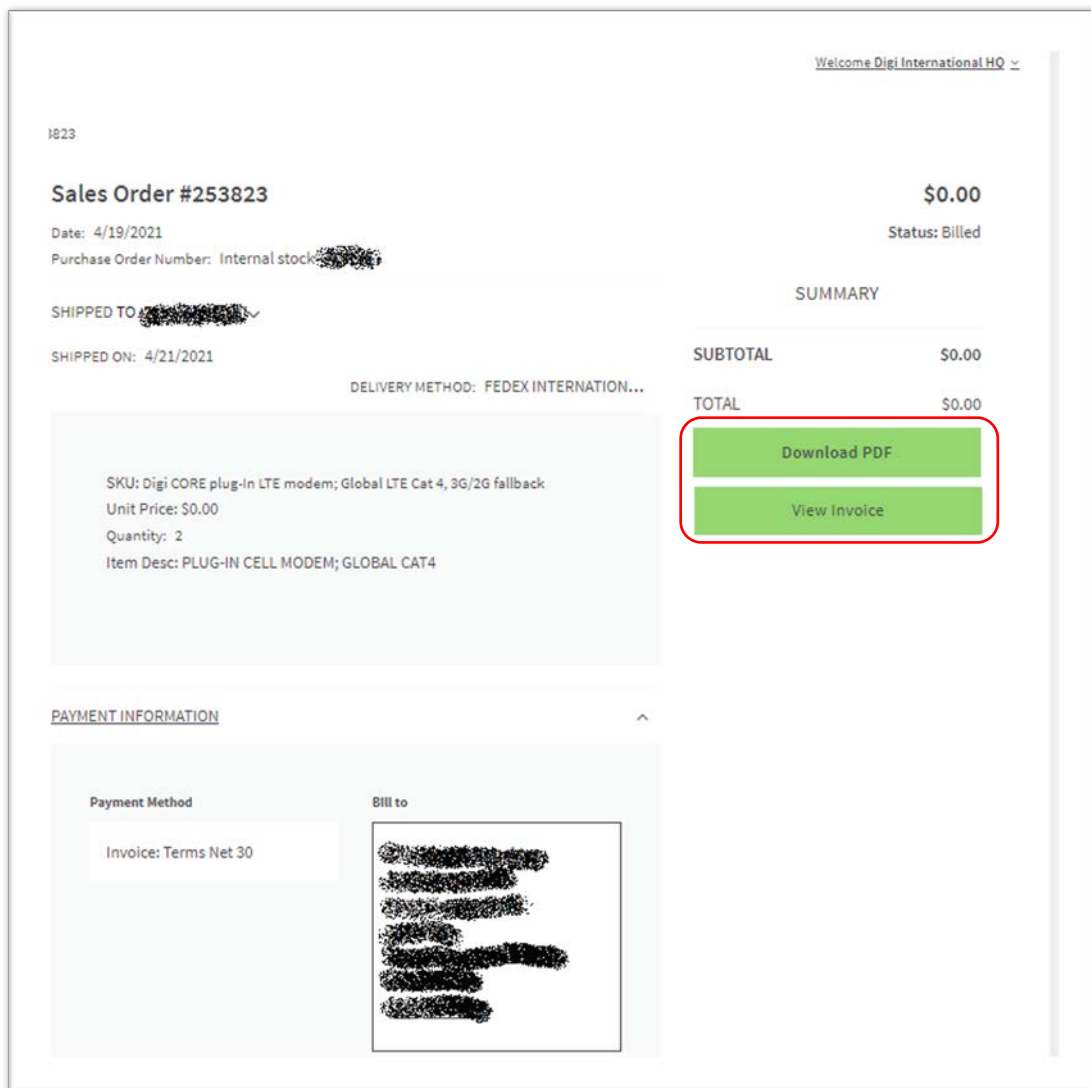
- To view purchase details, in the Sales Order No. column, click the sales order number (see [View Purchase Details](#)).
- To view shipment tracking, in the Track Items column, click **Track Packages** (multiple packages) or the tracking link.



View Purchase Details

To view purchase details, in the Purchase History, click an entry in the Sales Order No. column. The purchase details include the sales order number, the purchase date, the purchase order number, the amount, the status, and the purchased items. In the Purchase Details, you can do the following:

- To download the purchase details to PDF, click **Download PDF**. The Customer Portal creates the PDF file in your *Downloads* folder and presents a link in the lower left part of your screen.
- To view the invoice, click **View Invoice** (see [Error! Reference source not found.View Invoice Details](#)).





View Return Authorization List

To view the return authorization (RA) list, select **Purchases > Returns**. You can filter by date, and you can sort by date or by RA number in ascending or descending order. To view the RA, from the Return Authorization List, click an entry in the Return Authorization column (see [View Return Authorization Details](#)).

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Return Authorizations

Requested from to ▾

Return Authorization	Date	Items	Amount	Status
10327	7/15/2021	1	\$0.00	Pending Approval
10326	7/1/2021	10	\$1,290.00	Pending Approval
9788	3/22/2021	1	\$0.00	Pending Receipt
9469	2/25/2021	10	\$0.00	Pending Receipt
9468	2/25/2021	4	\$0.00	Pending Receipt
9467	2/25/2021	50	\$250.00	Pending Receipt



View Return Authorization Details

To view RA details, click the RA number in the Return Authorizations List. The RA details include the RA number, return date, status, and the returned item. To download the RA details to PDF, click **Download PDF**. The Customer Portal creates the PDF file in your *Downloads* folder and presents a link in the lower left part of your screen.

The screenshot shows the details for Return Authorization #10327. At the top right, it says "Welcome Digi International HQ". On the left, the number "327" is displayed. The main heading is "Return Authorization #10327" with a corresponding value of "\$0.00" on the right. Below this, the date is "Date: 7/15/2021" and the status is "Status: Pending Approval". At the bottom left, there is a link for "RETURNED PRODUCT" and an upward arrow icon. At the bottom right, there is a link for "ITEMS SUMMARY".

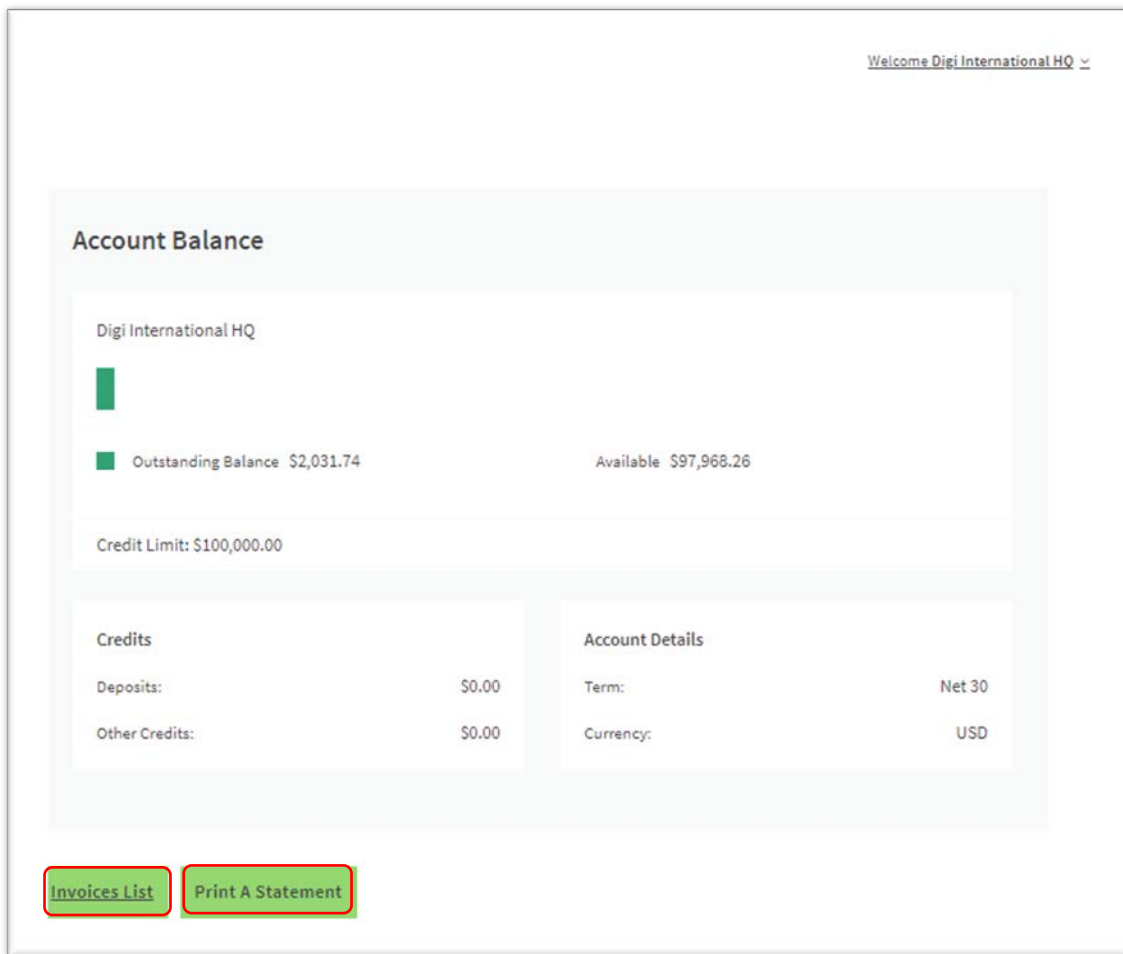
View Account Information

You can your account information with the following tasks:

- [View Account Balance](#)
- [View Invoices List](#)
- [View Invoice Details](#)
- [View Transaction History](#)

View Account Balance

To view the current account balance and account details, select **Billing > Account Balance**. To view the invoice list, from the Account Balance page, click **Invoices List** (see [View Invoices List](#)). To print an account balance statement, click **Print A Statement**.





View Invoices List

To view the invoices list, select **Billing > Invoices**. You can filter by paid status and due date. You can sort by due date, invoice date, invoice number, and amount due in ascending or descending order. To view invoice details, click the invoice number (see [View Invoice Details](#)).

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Invoices

Open Paid in Full

Show All [dropdown] [sort icon] By Due Date [dropdown]

Select All (12)

Invoice No.	Date	Amount	Due Date
<input type="checkbox"/> Invoice #INVUS137563	4/2/2018	\$804.40	5/2/2018
<input type="checkbox"/> Invoice #INVUS078566	2/1/2019	\$48.00	3/3/2019
<input type="checkbox"/> Invoice #INVUS113712	7/30/2019	\$11.51	8/29/2019
<input type="checkbox"/> Invoice #INVUS168761	2/1/2020	\$48.00	3/2/2020

View Invoice Details

To view an invoice, select **Billing > Invoices**, and then click the invoice number. The invoice details include the invoice date, due date, amount due, status, and the product. From the invoice details, you can do the following:

- To view sales representative information, click **Sales Rep.**
- To view billing address and terms, click **Billing.**
- To export this invoice to PDF, click **Download as PDF**. The Customer Portal creates the PDF file in your *Downloads* folder and presents a link in the lower left part of your screen.

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/US078566

Invoice #INVUS078566 **\$48.00**

Invoice Date: 2/1/2019 Status: Open
Created from: [Purchase #86402](#)
Due date: 3/3/2019

PRODUCT (1)			
SKU: DGF-BDL-PREM-1YR	Unit Price:	1	\$48.00
Item Desc: Digi Complete Add-on Bundle			
1-yr			

SUMMARY	
Subtotal 1 Item	\$48.00
Tax Total	\$0.00
Shipping	\$0.00
Handling	\$0.00
Amount Due	\$48.00

[Download As PDF](#)

[SALES REP](#)

[BILLING](#)

Terms:
Net 30



View Transaction History

To view the transaction history (invoices, payments, credits), select **Billing > Transaction History**. You can filter by date and transaction type. You can sort by date, transaction number, or amount. To page through the transactions, click the page numbers at the bottom of the display. To show transaction details, click the transaction number.

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Transaction History

From to by

Number	Date	Amount	Status
Invoice #INVUS315118	4/22/2021	\$0.00	Paid In Full
Invoice #INVUS314987	4/21/2021	\$0.00	Paid In Full
Invoice #INVUS314014	4/16/2021	\$0.00	Paid In Full
Invoice #INVUS313980	4/15/2021	\$0.00	Paid In Full
Invoice #INVUS313194	4/13/2021	\$0.00	Paid In Full
Invoice #INVUS312559	4/12/2021	\$0.00	Paid In Full
Invoice #INVUS312577	4/12/2021	\$0.00	Paid In Full
Invoice #INVUS311590	4/8/2021	\$0.00	Paid In Full

Manage Warranties

You can manage warranties on your networking devices on the Customer Portal. Networking devices are those devices that have serial or IMEI numbers, which include cellular routers, gateways, USB and sensor connectivity devices, console servers, and terminal servers.

- [Register a Network Device Warranty](#)
- [View Network Devices with Registered Warranties](#)

Register a Network Device Warranty

Network devices are identified uniquely by a serial number. IMEI and MAC numbers can also serve as serial numbers. To register a network device warranty:

1. Select **Warranty Registration > Register Device**.
2. In the Warranty Registration page, click **Add New**.
3. In the Add New Warranty Registration page, enter values for the following fields, and then click **Add**:
 - **Product Name**: Type the product name.
 - **Serial Number(s)/IMEI(s)**: Type the serial numbers or IMEI numbers. Delimit up to 600 serial numbers with commas.

Add New Networking Device

Required *

Product Name

Serial Number(s)/IMEI(s) *

Enter up to 600 part number(s) separated by commas.
[How do I find my Serial Number\(s\)/IMEI\(s\)? Which one do I use?](#)

Add **Cancel**

4. The new device registration appears in the registered device list (see [View Network Devices with Registered Warranties](#)).



View Network Devices with Registered Warranties

To view serialized devices with registered warranties, select **Warranty Registration > Registered Network Devices**. You can sort the list by item number or by serial number in ascending or descending order.

[Welcome Digi International HQ](#) ▾

Devices

Registered Networking Devices

Products registered by Serial Number or IMEI. Products include Cellular Routers, Gateways, USB and Sensor Connectivity, and Console and Terminal Servers.

Show All ▾ ↑↓ by Serial Number ▾

Serial Number	Item	Warranty Start Date	Warranty End Date
0004F3085B3F	FT-GTW	12/12/2017	12/12/2019
0004F3085B5F	FT-GTW	11/7/2018	11/7/2020
0004F3085BAB	FT-GTW	12/12/2017	12/12/2019
0004F309BA3C	FT-GTW	11/7/2018	11/7/2020
0013A2004104363D	FT-SNC	1/5/2017	1/5/2019
0013A20041052721	FT-SNC	2/9/2017	2/9/2019
0013A20041052A89	FT-SNC	2/9/2017	2/9/2019

Manage the Customer Portal

The Customer Portal provides several settings that enable you to do the following:

- [Update Profile Information](#)
- [Update Subscription Preferences](#)
- [Update Password](#)

Update Profile Information

To update your Customer Portal profile information:

1. Select **Settings > Profile Information**.
2. In the Profile Information page, click the **Company Name** or **Phone Number** fields, and then type the new information.
3. Click **Update**.

To change your Email address:

Note: Changing your Email address changes your Customer Portal user name.

1. In the Profile Information page, click **Change Address**.
2. In the Change Email page, Click the **New Email** field, and then type your new Email address.
3. Click the **Confirm New Email** field, and then retype your new Email address.
4. Click the **Password** field, and then type your current password.
5. Click **Send Verification Email**.

Change Email

Required *

New Email *

your@email.com

New Email is required

Confirm New Email *

your@email.com

Password *

You will still be able to login with your current email address and password until your new email address is verified.

Send Verification Email

6. The Customer Portal sends you a verification Email. Follow the instructions to activate your new Email address and Customer Portal user name.

Update Subscription Preferences

To change your newsletter and subscription preferences, select **Subscriptions**. In the Subscriptions page, select or clear the newsletter and subscription check boxes according to your preferences, and then click **Update**.

Select the subscription check boxes to do the following:

- **Billing:** Select this check box to receive invoices by Email.
- **Digi RM Subscription Opt Out:** Select this check box to decline Digi Remote Manager marketing and product notification Emails.
- **Marketing:** Select this check box to receive marketing materials by Email.
- **Revised Ship Date Notification:** Select this check box to receive Email notification when an order ship date changes.
- **Sales Order Acknowledgement:** Select this check box to receive Email acknowledgement of your sales order.
- **Shipment Notification:** Select this check box to receive Email notification when your order ships.
- **Surveys:** Select this check box to receive product surveys by Email.

Update Password

To update your password:

1. Select **Settings > Password**.
2. In the Update Your Password page, click the **Current Password** field, and then type the current password.
3. Click the **New Password** field, and then type the new password.
4. Click the **Confirm Password** field, and then retype the new password.
5. Click **Update**.

Update Your Password

Required *

Current Password *

New Password *

Confirm Password *

Update



Revision Table

Revision Table

Revision/ECO	Sections Affected	Reason
A (09/28/21)	All	New document