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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:
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.
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**).
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.

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**.
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.

![Support Cases](image-url)
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.

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.

![PCN List]

<table>
<thead>
<tr>
<th>Title</th>
<th>Date</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>PCN 210728-02 Product EOL Notice 191022-01 AnywhereUSB FOR FUN</td>
<td>7/28/2021</td>
<td>End of Life Notice</td>
</tr>
<tr>
<td>PCN 210728-01 Digi Connect Sensor</td>
<td>7/28/2021</td>
<td>End of Life Notice</td>
</tr>
<tr>
<td>PCN 210727-02 Digi Connect Sensor</td>
<td>7/27/2021</td>
<td>General Product Notice</td>
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<td>Digi Connect Sensor</td>
<td>7/20/2021</td>
<td>General Product Notice</td>
</tr>
</tbody>
</table>
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 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).
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.
View Account Information

You can view 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).
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.
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.

![Transaction History Table](image-url)
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.

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.
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**.

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**.
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<td>All</td>
<td>New document</td>
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