

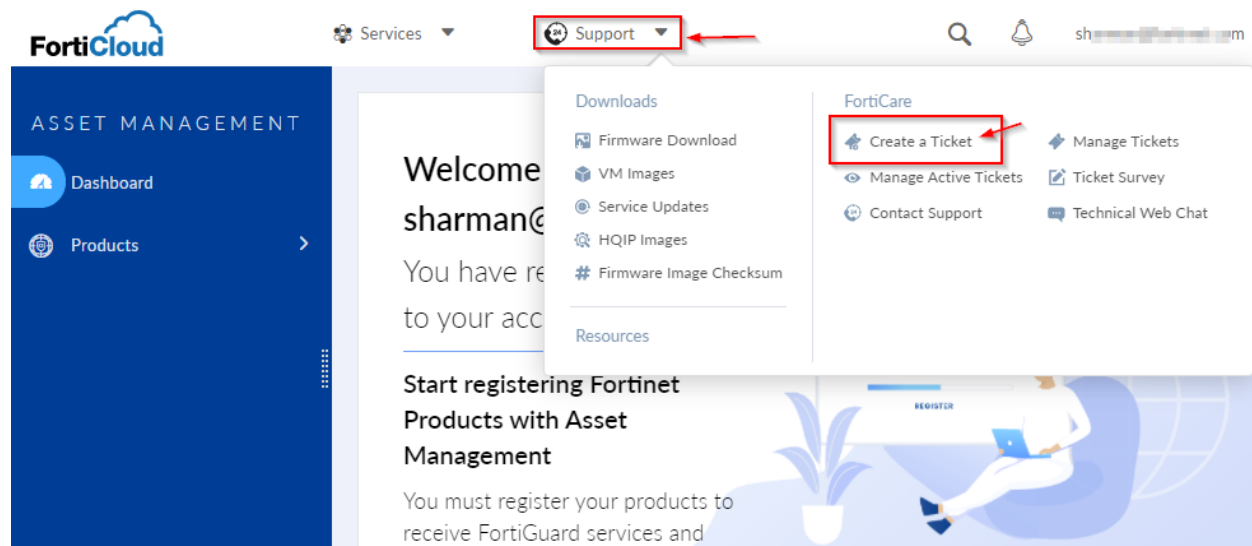


Ticket Creation Guide

Introduction

This Ticket Creation Guide explains how requests for assistance may be made using the Fortinet Support Portal. Before creating a ticket it is worth considering the other available resources to address your issue:

- The Fortinet Knowledge Base contains solutions to many issues raised by customers.
- The Technical Document Library contains a full set of product documentation and release notes which describe the products and how to use them.
- The Fortinet Technical Discussion Forums has many posts which address common questions in the use of Fortinet products.
- The Technical Web Chat service, available in the 'Assistance' menu option provides direct access to a Fortinet engineer for general technical questions about Fortinet products and services. This service is not intended for complex issues that are likely to require in-depth troubleshooting. Tickets for assistance with Fortinet products may be created through the Support Portal at <https://support.fortinet.com> by selecting '**Create a Ticket**' from the '**Support**' dropdown option.



Alternatively, click on the Product List option and then click on the serial number and then click on create a ticket.

There are five types of ticket that can be created depending upon the issue that is being reported:

- Technical Assistance
- Customer Service
- Dead on Arrival / RMA
- Antivirus ticket / FortiGuard Services
- Fortinet Converter Ticket (FortiConverter Service)

Selection of the appropriate ticket type will ensure that the ticket reaches the correct team to handle the issue. With the exception of **Customer Service**, an appropriate support contract or warranty coverage is required for each ticket type.

Technical Assistance: The Technical Support team is staffed by engineers who have experience in the networking and security industries. They are trained to resolve product and network integration issues. The Technical Support team interfaces with the Fortinet engineering organization to ensure that bug fixes are addressed promptly.

Customer Service: The Customer Service team is composed of customer service specialists who are responsible for entitlement, contracts and the resolution of product registration issues.

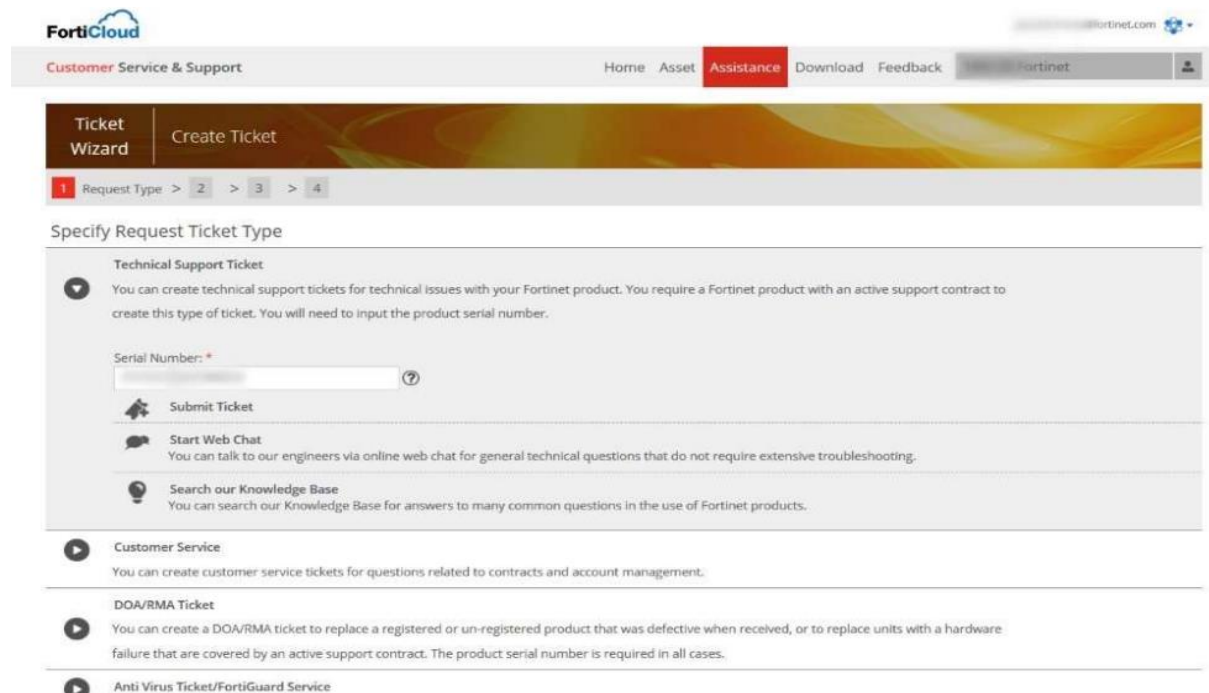
Dead on Arrival / RMA: A unit is classified as DOA (Dead on Arrival) if a defect is reported within the first 30 days after product registration but no later than 120 days after original shipment from Fortinet to the distributor. A replacement unit will be a new unit. If the unit no longer qualifies as a DOA the replacement will be handled as a standard RMA. Fortinet provides efficient and reliable replacement services for its products that may require repair during or beyond the product's warranty period.

After the type of ticket is selected, please refer to the corresponding section for step by step instructions to ticket creation.

Technical Assistance Request

Serial Number

The first step to create a Technical Assistance Request is to identify the product serial number. A serial number registered and under valid support coverage is required in order to receive Technical Assistance. The serial number must correspond to the product that Fortinet will be troubleshooting for the reported defect.



The screenshot shows the Fortinet Customer Service & Support portal. The navigation bar includes 'Home', 'Asset', 'Assistance', 'Download', and 'Feedback'. The 'Assistance' tab is active. The 'Ticket Wizard' is displayed, with 'Create Ticket' selected. The 'Request Type' is set to '1'. The 'Specify Request Ticket Type' section is active, showing the following options:

- Technical Support Ticket**: You can create technical support tickets for technical issues with your Fortinet product. You require a Fortinet product with an active support contract to create this type of ticket. You will need to input the product serial number. This option is selected, and a 'Serial Number' input field is visible.
- Customer Service**: You can create customer service tickets for questions related to contracts and account management.
- DOA/RMA Ticket**: You can create a DOA/RMA ticket to replace a registered or un-registered product that was defective when received, or to replace units with a hardware failure that are covered by an active support contract. The product serial number is required in all cases.
- Anti Virus Ticket/FortiGuard Service**

After typing the first 3 characters of the serial number, the system will propose a list of serial number from your own registered products, if any. Enter or select a serial number, then click Go.

Contact Information

This information shall be used by the Technical Support team in case they need to contact you. The fields are prefilled with your profile information. Please ensure the information is correct and don't forget to indicate the country code when typing the Telephone and Mobile phone information.

The screenshot displays the FortiCloud Customer Service & Support interface. At the top, there is a navigation bar with 'Home', 'Asset', 'Assistance' (highlighted in red), 'Download', and 'Feedback'. Below this is a 'Ticket Wizard' section with a progress indicator showing four steps: 1. Request Type, 2. Basic Info (current step), 3. Comment, and 4. Completion. The 'Specify Ticket Information' section is divided into two parts: 'Contact Information' and 'Ticket Information'. The 'Contact Information' section includes fields for Name (prefilled with 'Jersey Richards'), Email (prefilled with 'jrichards@spg.com'), Telephone (prefilled with '+1 613 820-7100'), and Mobile Phone. The 'Ticket Information' section includes fields for Subject, Product Type (prefilled with 'FortiGate'), Category, S/W Version, Patch, and Ticket Priority (with radio buttons for P3 and P4, where P4 is selected). A note below the priority field states: 'Please contact your regional support center to create urgent P1 or P2 tickets'.

After typing the first 3 characters of the serial number, the system will propose a list of serial number from your own registered products, if any. Enter or select a serial number, then click Go.

This information shall be used by the Technical Support team in case they need to contact you. The fields are prefilled with your profile information. Please ensure the information is correct and don't forget to indicate the country code when typing the Telephone and Mobile phone information.

Ticket Information

- The Subject should be a very brief description of your request.
- The Product Type is auto-detected from the serial number.
- The Category should match the feature or software component that is related to your request.
- The S/W version and Patch number should be selected from the drop down lists.
- The Ticket Priority determines initial response, reporting interval and notification schedule.

In case of P1 or P2 request, continue with the ticket creation set as P3. Once the ticket has been created, **telephone your regional Support Center** with your ticket number in order to increase the priority. Continue with your ticket creation by adding a detailed description of the problem in the text field below.

The screenshot shows the 'Ticket Wizard' interface. At the top, it says 'Ticket Wizard' and 'TA Ticket'. Below that, there's a progress bar with four steps: 1. Request Type, 2. Basic Info, 3. Comment (highlighted in red), and 4. Completion. The 'Add Comment' section has a note: 'Note: The maximum characters system allow to be entered here is 8000.' Below the note is a list of requirements for technical support: 1. A detailed problem description, 2. Relevant background information (Has the configuration worked in the past? Is this a new configuration? Have any changes been made recently to the Fortinet device or application or on the network?), 3. A network diagram with the IP addressing clearly indicated, 4. Configuration file(s), 5. Debug log(s)/Error messages, and 6. A description and the results of your troubleshooting steps. Below the list is an 'Attachments' section with buttons for 'Log File', 'Configuration', 'Virus Sample File (Temp)', and 'Other', along with a help icon. At the bottom, there are 'Previous' and 'Next' buttons.

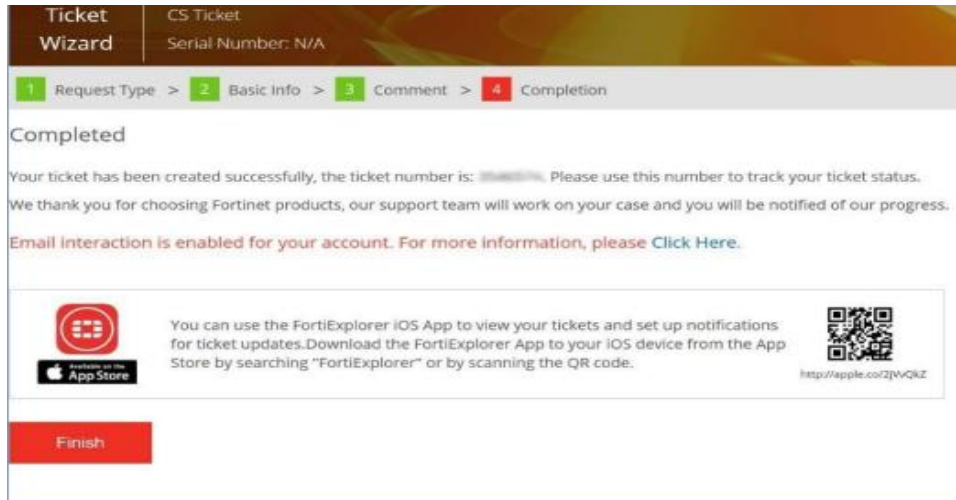
In order for Fortinet Technical Support to provide you with the optimum level of service, we request that the following information be provided:

- A problem description
- Relevant background information (Has the configuration worked in the past? Is this a new configuration? Have any changes been made recently to the Fortinet device or application or on the network?)
- A network diagram with the IP addressing clearly indicated
- Configuration file(s)
- Debug log(s)
- A description and the results of your troubleshooting steps

In case additional documents (debug file, screen shots ...) could help the Technical Support team addressing your request, please attach the files using the Attachments option. Note that more files can also be attached after the ticket is created. When attaching a file there are two options available: "Keep the file" and "Temporary storage". If the "Temporary storage" option is chosen the attachments will be deleted once the ticket is closed. Once the above steps are completed, click **Next** to create the ticket.

Retrieve Ticket Number

Right after ticket creation, a confirmation page will indicate your ticket number. The ticket number is the reference to quote for any follow up with Fortinet.



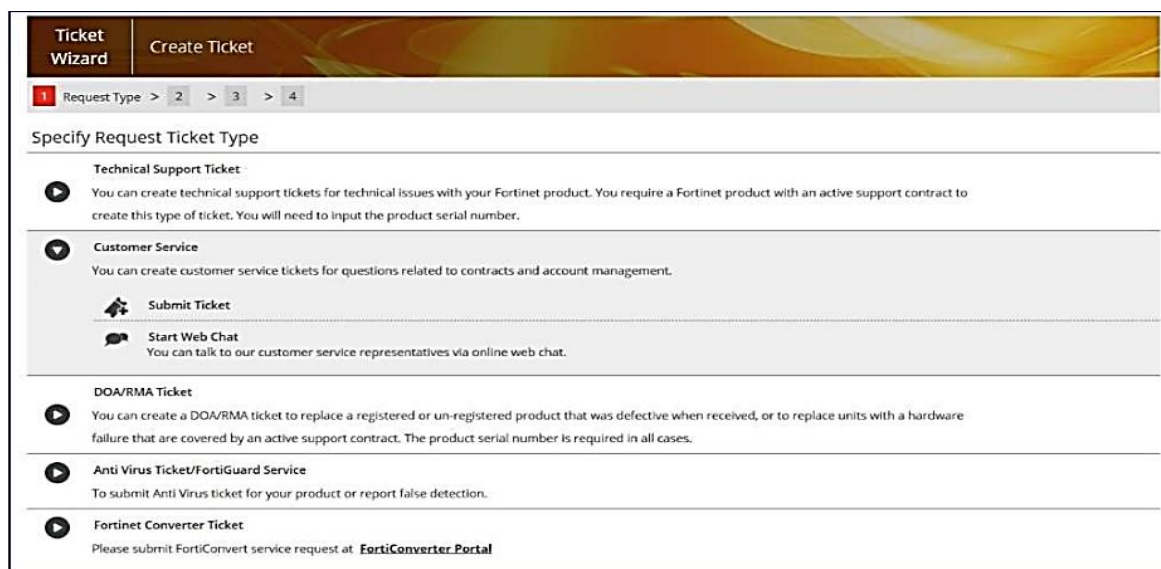
The screenshot shows the 'Ticket Wizard' interface for a 'CS Ticket'. The progress bar indicates the process is complete (1. Request Type, 2. Basic Info, 3. Comment, 4. Completion). The main heading is 'Completed'. The text states: 'Your ticket has been created successfully, the ticket number is: [redacted]. Please use this number to track your ticket status. We thank you for choosing Fortinet products, our support team will work on your case and you will be notified of our progress. Email interaction is enabled for your account. For more information, please [Click Here](#).' Below this, there is a section for the FortiExplorer iOS App, including the App Store logo, a QR code, and the URL 'http://apple.co/2jvVQKZ'. A red 'Finish' button is located at the bottom left.

Email interaction provides a convenient means of communicating with the engineer assigned to your ticket without having to log into the Support Portal. Email updates will only be accepted to your ticket if they are received as a reply to a ticket comment sent from our engineer, and that the sender is registered as a contact on your account.

Customer Service Request

Serial Number

A serial number is **not** necessary in order to raise a Customer Service request. However, should your request be related to a specific serial number, then it is recommended to indicate the 16 character SN to start the ticket creation process.



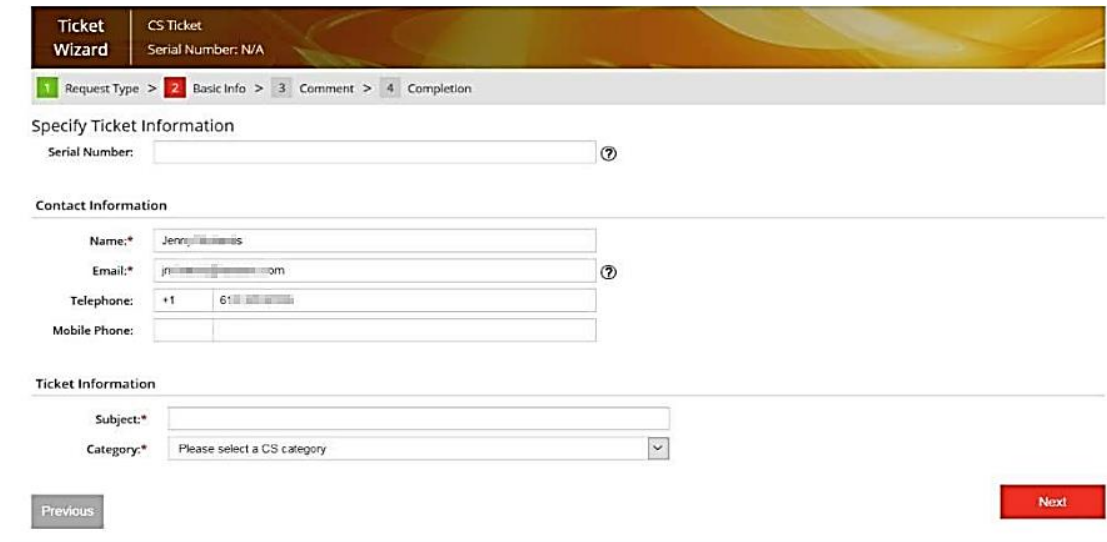
The screenshot shows the 'Ticket Wizard' interface for 'Create Ticket'. The progress bar indicates the current step is '1. Request Type'. The main heading is 'Specify Request Ticket Type'. The page lists several options:

- Technical Support Ticket**: You can create technical support tickets for technical issues with your Fortinet product. You require a Fortinet product with an active support contract to create this type of ticket. You will need to input the product serial number.
- Customer Service**: You can create customer service tickets for questions related to contracts and account management. This option is selected with a radio button. It includes sub-options:
 - Submit Ticket**
 - Start Web Chat**: You can talk to our customer service representatives via online web chat.
- DOA/RMA Ticket**: You can create a DOA/RMA ticket to replace a registered or un-registered product that was defective when received, or to replace units with a hardware failure that are covered by an active support contract. The product serial number is required in all cases.
- Anti Virus Ticket/FortiGuard Service**: To submit Anti Virus ticket for your product or report false detection.
- Fortinet Converter Ticket**: Please submit FortiConvert service request at [FortiConverter Portal](#).

Note that after typing the first 3 characters of the serial number, the system will propose a list of serial number from your own registered products, if any.

Contact Information

This information shall be used by the Customer Service Team in case they need to contact you. The fields are prefilled with your profile information. Please ensure the information is correct and don't forget to indicate the country code when typing the Telephone and Mobile phone information.



The screenshot displays the 'Ticket Wizard' interface for creating a 'CS Ticket'. The 'Basic Info' step is active, showing a progress bar with steps: 1 Request Type, 2 Basic Info, 3 Comment, and 4 Completion. The 'Specify Ticket Information' section includes a 'Serial Number' field. The 'Contact Information' section contains fields for 'Name' (prefilled with 'Jenn...@...'), 'Email' (prefilled with 'j...@...com'), 'Telephone' (prefilled with '+1 610 ...'), and 'Mobile Phone'. The 'Ticket Information' section includes a 'Subject' field and a 'Category' dropdown menu (prefilled with 'Please select a CS category'). 'Previous' and 'Next' buttons are located at the bottom.

Ticket Information

The Subject and Category should be a brief description of your request. Then continue with your ticket creation by adding a detailed description of the problem in the text field below. Ticket Creation Guide The pre-filled text indicates the important information that should be mentioned along with ticket creation.

In case additional documents (Contract file, screen shots ...) could help the Customer Service Team addressing your request, please attach the files using the section below. Note that more files can also be attached after the ticket is created. When attaching a file there are two options available: "Keep the file" and "Temporary storage". If the "Temporary storage" option is chosen the attachments will be deleted once the ticket is closed.

Once above steps are completed, click Next to create the ticket.

Ticket Wizard CS Ticket
Serial Number: N/A

1 Request Type > 2 Basic Info > 3 Comment > 4 Completion

Add Comment

Note: The maximum characters system allow to be entered here is 8000.

In order for our Customer Service team to provide you with the optimum level of support, we request that the following information be provided:

1. Product serial number(s)
2. Support contract or license number (if any)
3. Account ID (email) if an additional account is concerned
4. A description of your requirement
5. If you are requesting assistance with registration, please specify for each serial number whether the end user is a government entity.

Attachments

Log File - Configuration - Virus Sample File (Temp) Other - ?

Previous Next

Retrieve Ticket Number

Right after ticket creation, a confirmation page will indicate your ticket number. The ticket number is the reference to quote for any follow up with Fortinet.

Dead on Arrival (DOA) / RMA Claim

Serial Number

A serial number (16 characters) is required in order to request a DOA or RMA hardware replacement. The serial number can either be:

- Unregistered or registered and within the DOA policy period, or
- Registered and covered by an active support contract.

In all cases, the serial number must correspond to the product that has the reported defect. If the DOA/RMA claim concerns an accessory (power supply, hard drive etc) then the ticket should be created using the serial Ticket Creation Guide number of the specific product, and the details of the required accessory should be entered in the ticket problem description.

Ticket Wizard | Create Ticket

1 Request Type > 2 > 3 > 4

Specify Request Ticket Type

- Technical Support Ticket**
You can create technical support tickets for technical issues with your Fortinet product. You require a Fortinet product with an active support contract to create this type of ticket. You will need to input the product serial number.
- Customer Service**
You can create customer service tickets for questions related to contracts and account management.
- DOA/RMA Ticket** (Selected)
You can create a DOA/RMA ticket to replace a registered or un-registered product that was defective when received, or to replace units with a hardware failure that are covered by an active support contract. The product serial number is required in all cases.
Serial Number: * ?
- Anti Virus Ticket/FortiGuard Service**
To submit Anti Virus ticket for your product or report false detection.
- Fortinet Converter Ticket**
Please submit FortiConvert service request at [FortiConverter Portal](#)

Note that after typing the first 3 characters, the system will propose a list of matching serial numbers from your registered products.

Then click Go.

Contact Information and Ticket Information

This information shall be used by the RMA Team in case they need to contact you. The fields are pre-filled with your profile information. Please ensure the contact information is correct and don't forget to indicate the country code when typing a Telephone number.

Ticket Wizard | RMA Ticket
Serial Number: [pre-filled]

1 Request Type > 2 Basic Info > 3 Shipping Info > 4 Comment > 5 Completion

Specify Ticket Information

Contact Information

Name: *

Email: * ?

Telephone:

Mobile Phone:

Ticket Information

Subject: *

Product Type: *

Category: *

- The Subject should be a very brief description of your request.
- The Product Type is auto-detected from the serial number.
- The Category should be set to Hardware

Online RMA Form

In order to proceed with your hardware replacement, this form should be completed. For any of the questions related to your defective product, choose I don't know from the drop-down menus if you are not comfortable with providing an answer.

Shipping & Billing Information

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Ship to</p> <p>Contact Name: * <input type="text" value="John Williams"/></p> <p>Company Name: * <input type="text" value="Hamer Co."/></p> <p>Street Address: * <input type="text" value="300 Waterloo Road"/></p> <p>City: * <input type="text" value="Ottawa"/></p> <p>Country: * <input type="text" value="CANADA"/></p> <p>State/Province: <input type="text" value="Ontario"/></p> <p>PostCode: * <input type="text" value="K2H 8G3"/></p> <p>Email: * <input type="text" value="jwilliams@hamer.com"/></p> <p>Phone: * <input type="text" value="+1"/> <input type="text" value="613-222-8930"/></p> <p>Fax: <input type="text"/></p> </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Bill to <input type="checkbox"/> same as 'Ship to'</p> <p>Contact Name: * <input type="text" value="John Williams"/></p> <p>Company Name: * <input type="text" value="Hamer Co."/></p> <p>Street Address: * <input type="text" value="300 Waterloo Road"/></p> <p>City: * <input type="text" value="Ottawa"/></p> <p>Country: * <input type="text" value="CANADA"/></p> <p>State/Province: <input type="text" value="Ontario"/></p> <p>PostCode: * <input type="text" value="K2H 8G3"/></p> <p>Email: * <input type="text" value="jwilliams@hamer.com"/></p> <p>Phone: * <input type="text" value="+1"/> <input type="text" value="613-222-8930"/></p> <p>Fax: <input type="text"/></p> </div>
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*The Ship To information will be used by Fortinet to ship your replacement product once approved, and by the freight forwarder for delivery.
 *The Bill To information is required if different from the shipment address. Should the Customer fail to return the defective unit, this information may be used.
 *Refer to the FortiCare Terms & Conditions available on the Home page for further details.

Defective product information

Is the unit used in a HA / cluster configuration? *

For RAID system, indicate capacity per HDD:

RMA Contract and Service Transfer Option

It is recommended to select the 'Automatic Transfer' option for the RMA request, this will ensure that the replacement SN will be automatically registered to your account when it is shipped from Fortinet. All existing Support contracts will also be transferred from the defective unit to the replacement unit.

If this option is not chosen then it will be necessary to return to the Support Portal once the replacement part is installed and to manually perform an RMA transfer to register the units and transfer support entitlements.

Then click **Next** to continue with the ticket creation.

Problem Description

Continue with your ticket creation by adding a detailed description of the problem in the text field below. The pre-filled text indicates important information related to hardware troubleshooting.

The screenshot shows the 'Ticket Wizard' interface for an RMA Ticket. The progress bar indicates the current step is '4. Comment', with previous steps being '1. Request Type', '2. Basic Info', and '3. Shipping Info', and the final step being '5. Completion'. The 'Add Comment' section includes a note about a 8000-character limit and a list of required information: a description of the problem, hardware troubleshooting results, and details of defective accessories. Below the text area is an 'Attachments' section with buttons for 'Log File', 'Configuration', 'Virus Sample File (Temp)', and 'Other', along with a help icon. 'Previous' and 'Next' navigation buttons are located at the bottom of the form.

In case additional documents (Contract file, screen shots ...) could help the RMA Team to address your request, please attach the files using the section below. Note that files can also be attached after the ticket is created.

When attaching a file there are two options available: “Keep the file” and “Temporary storage”. If the “Temporary storage” option is chosen the attachments will be deleted once the ticket is closed.

Once above steps are completed, click Submit Ticket to create the ticket.

Retrieve Ticket Number

Right after ticket creation, a confirmation page will indicate your ticket number. The ticket number is the reference to quote for any follow up with Fortinet.

Monitor the progress of a DOA claim / RMA request

When your request is approved for replacement, new fields will appear in the tickets to help you track the progress of the replacement.

1. RMA Status & Approval Date The RMA status is initially set to Pending Approval, it is then change to Approved, in progress or Rejected. In case it is approved, the Approval date will reflect the date of approval.

2. Shipping & Billing Information Ticket Creation Guide The information is the same as the one confirmed earlier in the ticket creation process.

3. Defective Product Information The information is the same as the one confirmed earlier in the ticket creation process.

4. Failure Information Failure code field will indicate whether the unit is entitled for DOA, RMA or is not entitled. Error code field will reflect the defect category of the defective unit. RMA type is used for Fortinet internal tracking.

5. Replacement Product Information Serial Number is the serial number of the unit that is being shipped as a replacement. Ship date is the date when the shipment of the replacement unit is made. Tracking # is the tracking number for the replacement unit shipment. Additional details may contain further comments with regards to the replacement unit shipment. Pro forma invoice is a copy of the pro forma invoice. This document may be requested by the freight forwarder for Customs clearance.

6. Return Instructions Items to be returned will either be unit only, unit + accessories or accessories only. It describes the scope of items that should be returned to Fortinet. Unit indicates the serial number of the unit that should be returned to Fortinet. The unit should not be returned if above field indicates accessories only. Accessories indicate the type and quantity of accessories to be returned, if any. RMA Center is the name of the Fortinet logistic center where the defective items should be returned. Shipping instructions is a document available for download that contains all necessary instructions for returning defective items to Fortinet. Prepaid return label is available only for scenario where Fortinet handles the return shipment fees. The label will be available as a file to download.

7. Print RMA form A paper copy of the RMA information can be printed via the Print RMA Form button. Please note that a paper copy of this form should be included in every shipment. Ticket Creation Guide Although Fortinet has attempted to provide accurate information in these materials, Fortinet assumes no legal responsibility for the accuracy or completeness of the information. Please note that no Fortinet statements herein constitute or contain any guarantee, warranty or legally binding representation. All materials contained within this publication are subject to change, modify, transfer or otherwise revise this publication without notice