How to Use the Customer Portal

Revised: 21-Oct-2018

Contents

OVERVIEW .................................................................................................................................................. 2

What you can do with the Customer Portal today: .................................................................................. 2

Security Levels: ........................................................................................................................................ 2

Miscellaneous: .......................................................................................................................................... 2

LOGGING IN AND OUT OF THE CUSTOMER PORTAL ............................................................................. 3

Logging In ................................................................................................................................................. 3

Logging Out ............................................................................................................................................... 3

MY ACCOUNT .............................................................................................................................................. 4

CREATE TICKET BUTTON ........................................................................................................................... 5

NAVIGATING THE CUSTOMER PORTAL ...................................................................................................... 5

HOME TAB .................................................................................................................................................. 6

TICKETS TAB ............................................................................................................................................ 7

Ticket Details ............................................................................................................................................. 8

REPORTS TAB ............................................................................................................................................ 9

ACCOUNT TAB .......................................................................................................................................... 9

Account Tab - Invoices Screen .................................................................................................................. 9

Account Tab - Users Screen ....................................................................................................................... 9

Account Tab - Agreements Screen ........................................................................................................... 9
OVERVIEW

What you can do with the Customer Portal today:

Service Tickets:
- View Open and Closed Service Tickets
- Create new Tickets
- View/Save/Print the Service Signoff Form
- View/Save/Print the Service Ticket detail Form
- Change a Ticket’s status to “>Cancelled” or “>No Action Required”
- Add text to the “Discussion” or “Resolution” of the ticket
- Add Attachments to the Ticket

Invoices:
- View/Save/Print Invoices
- View Payment Due Dates and view invoice payment statuses

Agreements:
- View Agreement Title and effective dates
- View Balance of Agreement (e.g., view hours used if you’ve purchased a block of service hours)

Reports:
- View and Save Reports (although the reports available today are very simple)

Administration:
- Add users and set their Permissions
- Set company preferences

Security Levels:
There are three Security levels:
- Admin – can do everything described above
- Manager – Everything admin can do except: Add users and change Company Preferences
- User – Can only enter, view, and modify their own tickets

Miscellaneous:
- Permissions are based on your email address
- Your email address will only allow access to your company – no other TSG customers
- TSG will need to add at least one “Admin” user per company – then either TSG or the Company Admin(s) can add/enable other users
- Either TSG or the Company Admin can reset passwords
LOGGING IN AND OUT OF THE CUSTOMER PORTAL

Logging In

1. Navigate to https://na.myconnectwise.net/tsgi

2. Enter your Email and Password.
3. Click Submit.
4. You are taken to the Customer Portal Home page:

Password Reset: From the Login screen you can also request a password reset (which will go to your Company administrator)

Request Access: From the Login screen you can request access to the Customer Portal but this will only work if TSG already recognizes your email address as an active Contact in the TSG database. Your company administrator or someone at TSG would need to add you to the Contacts list.

Logging Out

When you are finished using the Customer Portal, click the Log Out link on the top right-hand portion of the screen.
**MY ACCOUNT**

The My Account link is located at the top right-hand portion of the Customer Portal Screen. It will enable you to edit your Account Details.
CREATE TICKET BUTTON

Use the Create Ticket button to enter a new service request. When you create a new service ticket, your name, address, telephone number, email, and site will automatically populate on the ticket.

The following is a list of fields available when creating a new ticket.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Service Needed</td>
<td>Use the carousel to select the type of Service Request to enter – or choose “Other.”</td>
</tr>
<tr>
<td>Title</td>
<td>Enter summary for the problem or issue to be used as the Ticket Title.</td>
</tr>
<tr>
<td>Problem Description</td>
<td>Enter a complete description of the problem or issue. If you have multiple Sites, please be clear about which Site you are referencing.</td>
</tr>
<tr>
<td>Add Attachment</td>
<td>Use the Add Attachment button then browse for a document to attach. In the Title field, enter a title for the attachment.</td>
</tr>
<tr>
<td>Due Date</td>
<td>Optional: Enter the date you need the service ticket to be completed.</td>
</tr>
<tr>
<td>Emergency</td>
<td>Select this check box if the service request is an emergency.</td>
</tr>
<tr>
<td>PO Number</td>
<td>Optional: Enter a Purchase Order number to authorize the billing of this service ticket.</td>
</tr>
<tr>
<td>Contact Details</td>
<td>You’ll see your own contact details here. Please correct any data that is incorrect. You may also use the “Choose” button to select a different person than yourself to be used as the Contact for this ticket.</td>
</tr>
</tbody>
</table>

After completing the required fields and clicking Submit, you will receive a confirmation message with your ticket number.

NAVIGATING THE CUSTOMER PORTAL

The following information will assist you in successfully navigating the customer portal.

Most of the Customer Portal Tabs will have a Sort menu that will enable you to filter and narrow down your searches.

Most of the Customer Portal Tabs will also have a Summary View and a List View available. A Summary View will provide you with more Summary details about the item, while the List View condenses the details into one row.
HOME TAB

The home tab will give you an overview from which you can delve deeper into individual Tickets, Reports, Invoices, etc., or hit “See All >>” which will take you to the other Tabs.
TICKETS TAB

The Ticket Tab enables you to view all service tickets for your company. Certain security levels may be necessary to allow viewing ALL service tickets versus seeing only the tickets that the person logged in submitted themselves.

You can use the “Search By” section to assist in filtering results.

Click on the Ticket Title link to review the ticket’s details or add information.
Ticket Details

The Ticket Details screen appears in a popup window and allows you to:

- View and Print the Signoff form (using the “Sign Off” button)
- Change the status of a ticket (e.g. to “>Cancelled” using the “Change Status” button)
- View and Print a Detailed view of the Ticket (using the “Print” button)
- Add text information to the Discussion
- Add text to the Resolution
- Add Attachments
- Then Submit your changes (using the “Submit” button)
REPORTS TAB

You can view reports that summarize your interactions with TSG. Your ability to see these reports may be limited by the security level that your company administrators have assigned to you.

ACCOUNT TAB

In the Account tab, you can view Agreements, Invoices, and update Contact information (“Users”) for your company.

Account Tab - Invoices Screen

The Invoices tab displays invoices that are available. Selecting the invoice number link will open the invoice for you to review.

Account Tab - Users Screen

This view enables you to update company email addresses, phone numbers, and emails, in addition to changing your password.

If you have the security rights, a list view of all the Contacts for your Company will be available. You can click into any contact information to update it. In addition, you can click the Add New User button to add a new user to the portal.

Administrators can assign Security Levels to users from their company as follows:

- Admin – can do everything described in this document
- Manager – Everything Admin can do except: Add users and change Company Preferences
- User – Can only enter, view, and modify their own tickets

Account Tab - Agreements Screen

The Agreements view enables you to view all active agreements for your company.