



How to Use the Customer Portal

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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

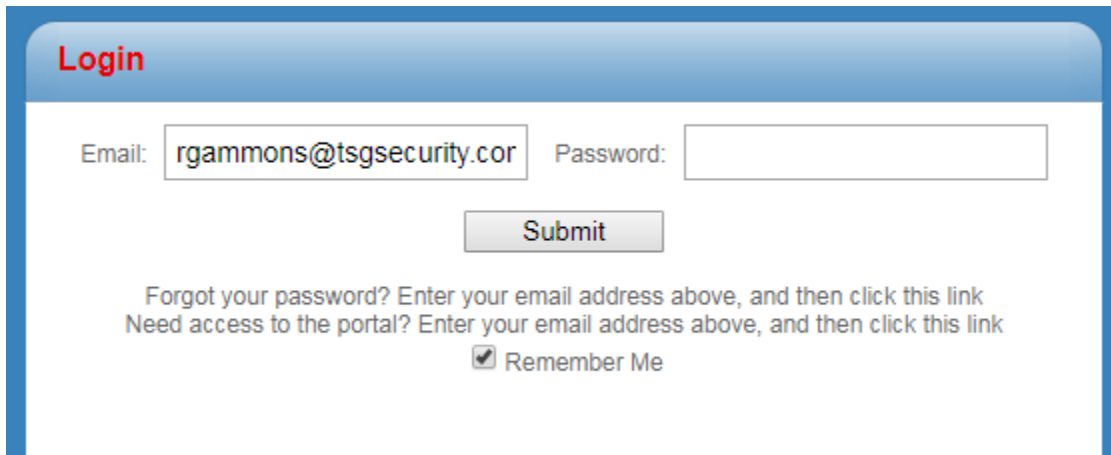
Miscellaneous:

- 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>



Login

Email: Password:

Forgot your password? Enter your email address above, and then click this link
Need access to the portal? Enter your email address above, and then click this link

Remember Me

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.

Richard Gammons-gmail | My Account | Log Out

My Account

Last Updated @ 9/27/18

First Name: Last Name:

Security Level:

Log-in Email:

Home Email:

Private Email:

Direct: Ext:

Home: Ext:

Mobile: Ext:

Pager: Ext:

Fax: Ext:

Fax/Home: Ext:

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.

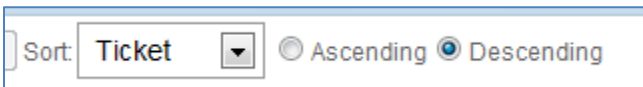
Select Service Needed	Use the carousel to select the type of Service Request to enter – or choose “Other.”
Title	Enter summary for the problem or issue to be used as the Ticket Title.
Problem Description	Enter a complete description of the problem or issue. If you have multiple Sites, please be clear about which Site you are referencing.
Add Attachment	Use the Add Attachment button then browse for a document to attach. In the Title field, enter a title for the attachment.
Due Date	Optional: Enter the date you need the service ticket to be completed.
Emergency	Select this check box if the service request is an emergency.
PO Number	Optional: Enter a Purchase Order number to authorize the billing of this service ticket.
Contact Details	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.

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

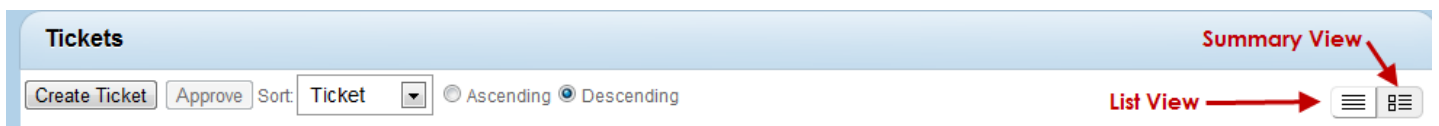
NAVIGATING THE CUSTOMER PORTAL

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 dive deeper into individual Tickets, Reports, Invoices, etc. or hit "See All >>" which will take you to the other Tabs.

Richard Gammons-gmail | My Account | Log Out

Home Tickets Reports Account [Create Ticket](#)

Welcome Richard Gammons-gmail

With TSG's Customer Portal, you have easy access to submit service requests, check status of service, and view statistics of past service.

TSG is continuing to improve our services. Other functions of this Customer Portal will be available in the future.

Alerts

- 0 Unpaid invoices
- 0 Open unapproved tickets

Statistics

2 Open Tickets 0 Tickets This Month 18 Tickets This Year

Ticket Totals By Month

Month	Ticket Totals
J	0
F	0
M	0
A	0
M	0
J	2
J	15
A	0
S	1
O	0
N	0
D	0

Open Tickets (2)

- TEST Ticket - Software Install
- CUSTOMER NEEDS (4) POPITS

[See All >>](#)

Reports (2)

- Service Request Trends - Last Year
- Service Request Trends - This Year

[Reports >>](#)

Unpaid Invoices (0)

[See All >>](#)

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.

Search By

Summary

Status
 Open
 Closed

Ticket #

Contact

[Show More](#)

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

Tickets

Sort: Ascending Descending

<input type="checkbox"/>	TEST Ticket - Software Install	646 Ticket	Resources	Access Control Type
	RGammons, Oct 10, 2018	New Status		
<input type="checkbox"/>	CUSTOMER NEEDS (4) POPITS	400 Ticket	Resources	Access Control Type
	RGammons, Oct 10, 2018	In Progress Status		

1-2 of 2 Items Per Page

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)

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CUSTOMER NEEDS (4) POPITS

Sign Off Change Status Submit Print

Last Updated @ 10/10/18

Ticket #	400	PO Number	Status	In Progress
Contact	Fred Stone	Required	Priority	Priority 3 - Medium

Problem

Discussion (0)

Add Something...
[▶ See Older Posts](#)

Resolution (0) Close

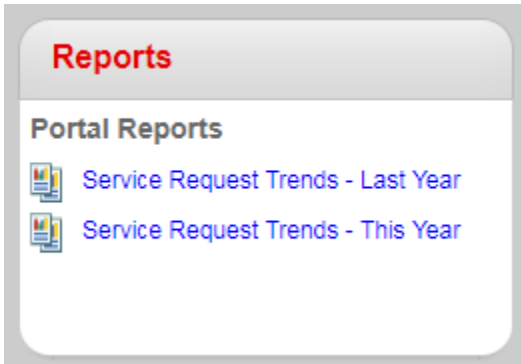
Add Something...

Tasks (0)

Attachments Add

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.