### Customer Support Portal -User Guide

The customer portal provides the opportunity to log support calls directly into our ticketing system, meaning you can easily track the progress and manage your tickets online.

- 1 Review and edit all tickets open, closed and scheduled
- 2 View and edit pending quotes or recommendations

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3 Search all your tickets for a particular subject e.g backup or email problems

4 Administrators can edit/ add users

- 5 Edit your account details such as email address or phone number
- 6 Click here to create a new support ticket
- Summary of open tickets. Click on the ticket to view/ edit details
- 8 Overview of tickets for the year

|   | 1     2     3     4       Home     Tickets     Recommendations     Knowledge Base     Account   |                  | 3  |                        | Sarah Mead   Settings   Log C<br>Create Ticket | ut<br>6 |
|---|---|------------------|--|------------------------|--|---------|
|   | Welcome Sarah Mead  |                  | Knowledge Base   |                        |  |         |
|   |   |                  | Q Describe Your Prol   | blem                   | Search   |         |
| 7 | Open Tickets (16)<br>NCI Out of Hours Support<br>Check non monitored backups and build monthly test plan<br>NCI Out of Hours Support<br>Configure a NCI BDR and document.<br>Managed Server reboot pending after Patching (Site Name:NCI Technologies ) | See All >>       | Alerts<br>• 4 Unapproved recommendation<br>• 0 Tickets needing approvals<br>Statistics<br>16 | <sup>s</sup><br>46     | 387  |         |
|   | Recommendations (14)  |                  | Open Tickets   | Tickets This Month     | Tickets This Year                              |         |
| 2 | Test01<br>Broadband<br>Test2<br>Platinum Contract<br>Shoretel - Test1<br>Rec  | commendations >> | 230<br>207-<br>184-<br>161-<br>138-<br>115-<br>92-<br>69-<br>46-<br>23-                      | Ticket Totals By Month | 2011   | 8       |
|   |   |                  | J F M  | AMJJAS                 | O N D  |         |

## **User Accounts**

To use the Portal you will require a logon account to be created.

Simply call us on **01326 379 497** or email **info@ncitech.co.uk** requesting access to the portal, we will then confirm your details and generate a password.

#### Logging on to the Portal

Go to http://clientportal.ncitech.co.uk or the NCI website www.ncitech.co.uk and click 'Help Desk' for 'Customer Helpdesk Portal'. You will be presented with a login screen. Enter your account details and click the green arrow.



# **Create a new ticket**

- **Step 1** Choose the type of ticket you wish to log
- **Step 2** Fill in the title and description. You can upload a document if required such as screenshots of the problem

Step 3 Please supply as many contact details as possible so that we can get in touch a.s.a.p. Click "submit".

| tep 1  | Select Service   | Needed                        |                        |  |   |
|--------|--|-------------------------------|------------------------|--|---|
|        | I have   | a general support<br>issue    | I have a sales request | I have a serious problem<br>affecting multiple users | X |
|        |  |                               |                        |  |   |
| tep 2  | Ticket Details   |                               |                        |  |   |
|        | Title  |                               |                        |  |   |
|        |  |                               |                        |  |   |
|        | Problem Descripti  | on                            |                        |  |   |
|        | Attach Document  |                               |                        |  |   |
|        | 0.000  |                               |                        |  |   |
|        | Due Date   |                               |                        |  |   |
|        | Due Date   | Eme                           | rgency                 |  |   |
| PO Nur | mber   | Eme                           | rgency                 |  |   |
| PO Nur | nber   | Eme                           | rgency :               |  |   |
| PO Nur | mber   | Eme                           | rgency                 |  |   |
| PO Nur | nber   | Eme                           | rgenoy                 |  |   |
| PO Nur | nber<br>Contact Detail   | Eme<br>S                      | rgency                 |  |   |
| PO Nur | Contact Detail   | Eme<br>S                      | gency                  |  |   |
| PO Nur | Contact Detail   | Eme                           | gency                  |  |   |
| PO Nur | Contact Detail<br>Contact Detail<br>Contact<br>Sarah Mead<br>Choose  | Eme                           | rgency                 |  |   |
| tep 3  | Contact Detail<br>Contact Sarah Mead<br>Choose<br>Phone  | Eme                           |                        |  |   |
| tep 3  | Contact Detail<br>Contact Contact<br>Sarah Mead<br>Choose<br>Phone   | Eme                           | rgency                 |  |   |
| tep 3  | Contact Detail Contact Serah Meed Choose Phone Ext   | I Ema                         |                        |  |   |
| tep 3  | Contact Detail<br>Contact Detail<br>Contact<br>Serah Meed<br>Choose<br>Phone<br>Ext  | E Ema                         |                        |  |   |
| tep 3  | Contact Detail Contact Detail Contact Sarah Meed Choose Phone Ext Ext Email  | Eme                           |                        |  |   |
| tep 3  | Contact Detail Contact Sarah Mead Choose Phone Ext Email Sarah@ncitec  | Eme<br>IS<br>h. co. uk        |                        |  |   |
| tep 3  | Contact Detail Contact Detail Contact Sarah Mead Choose Phone Ent Ent Isarah@noisec Address  | Eme<br>S                      | ngenoy:                |  |   |
| tep 3  | Doe Use<br>mber<br>Contact Detail<br>Sarah Mead<br>Choose<br>Phone<br>Ext<br>Ext<br>Exa<br>Sarah@notiec<br>Materiale Ho  | Eme<br>S<br>h.co.uk           |                        |  |   |
| tep 3  | Doe Jase<br>mear<br>Contact Detail<br>Contact Detail<br>Sarah Mead<br>Choose<br>Phone<br>Ext<br>Ext<br>Ext<br>Ext<br>Ext<br>Ext<br>Ext<br>Materiale Ho<br>Sarah Quodes   | Eme<br>S<br>h. co.uk          | ngency:                |  |   |
| PO Nur | boe Jase<br>mber<br>Contact Detail<br>Contact<br>Sarah Meed<br>Choose<br>Phone<br>Ext<br>Exam<br>Exam<br>Sarah Meed<br>Choose<br>Phone<br>Ext<br>Sarah Meed<br>Sarah Meed<br>Choose<br>Phone<br>Farah Meed<br>Sarah Meed<br>Choose<br>Phone<br>Farah Meed<br>Sarah Meed<br>Phone<br>Farah Meed<br>Sarah Meed<br>Phone<br>Farah Meed<br>Sarah Meed<br>Farah Meed<br>F | E Eme                         |                        |  |   |
| tep 3  | Doe Jake<br>mber<br>Contact Defail<br>Costact<br>Sarah Mead<br>Choose<br>Phone<br>Ent<br>Ental<br>Sarah@notiec<br>Subu Agettien<br>Falmouth Ro.<br>City  | h. co. uk<br>use<br>ad. Penyn | gency:                 |  |   |

# **Viewing/ updating a ticket**

Open the required ticket then add notes and check progress. Click "update" once finished and  $\bigotimes$  to close.



#### **User Account Management**

Admin users only

If you have administrative rights to the portal for your company, you can create, edit and disable user accounts from within the site. To do this, click "Users" under the account menu, select the user you wish to modify, and click "edit". Make necessary changes and click "Save".

To disable the user account, select "disable" from the user details screen. To create a user, click "Add New User" from the "All Users Screen".

**NOTE:** Security level "User" should be set for most users, "Admin" security setting allows users to see all service calls for the company and should be set with caution.

| Telats Recommendations Knowledge Base Account  |                                     | - Create 1   |
|--|-------------------------------------|--------------|
| Dars Dars  |                                     |              |
| According Classer Line Gare Name M & According C Descending  |                                     |              |
|  |                                     |              |
| and Declarated   |                                     | Mar 31, 2009 |
|  | Unar .                              | Enabled      |
|  |                                     |              |
| ner e Tudy Ardeson   | Trudy@nainedworkgies.co.uk<br>truet | Out 21, 2008 |
|  | Oter<br>Reserved                    | Enabled      |
| internet in the second se | John Gino-rectinologies co.uk       | Mar 2, 2012  |
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|  | Oper<br>Inclusion                   | Enabled      |
| Breve Coppen   | Strawel@Nos Fectivologies co.uk     | Jul 27, 2009 |
|  | User<br>Recent user                 | Enabled      |
| Neil Courter   | Neitightia Teurinutopies as uk      | Mey 17, 2008 |
|  | Age in<br>Birth Late                | Enabled      |
|  |                                     |              |

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