



## Customer Portal

The client portal is located at <https://connect.pcstechnology.com/support>

The client portal is a web based application used by PC Solutions' clients to enter technical issues/problems (called as service requests (SR)) encountered by them in doing business with the company. It helps in putting together all service requests in one central place accessible to all users and clients. This avoids the problem of collecting technical issues/problems from different clients communicated through different formats like emails, faxes, phones etc and then compiling them together. It is a more efficient way of managing service requests and offers better service to our clients.

PCS is able to provide better service with all of the service requests entered by various clients being visible on the service board. This helps not only in compiling all SRs together but also in setting various priorities to SRs, assigning resources and following through the life cycle of the SR.

### Portal login

Users login into the customer portal using their email-id and password. Successful login into the application leads to service requests list view. Your PCS representative can setup initial access to the portal.



Email:

Password:  

[Forgot your password? Click here to have it emailed to you.](#)

The following screens show all service request entries when the user is an administrator. However, when the user is not an administrator the views will be restricted to only entries that are for that user/contact. The Administrator will have additional screens for updating contacts.

## Views in the Customer Portal

### Main Menus of Customer Portal Icons:

- **Service Entry:** Used to enter new service requests through the portal.
- **Company's Entries:** A service request list view screen of the portal. It displays all the service requests for the user/contact in the company.
- **Knowledgebase:** Used to search for service requests and resolutions using key words/fields entered by the user.
- **Members:** Used for maintaining member lists of the portal. New members can be created from this screen.
- **Invoice Search:** Used to view closed invoices.
- **Reports:** Used to run Service Request Trend reports and/or the Executive Summary Report.
- **Setup:** Used to select an option for service status notification



### Service Entries

Service entry screen is used to enter to a new Service request in the portal.

On creating a new service request in the portal the details (like name, address, telephone number) of the contact who has logged in the portal are defaulted on this page. These details are non editable for non administrators. However, these fields are editable for an administrator and they have rights to assign a SR against any other contact of his company.

User/contact then selects the **service request type**. (These service types are different from the ones on the service board.) Selection of the service type will be entered into the internal notes field of the service request on PSA. This selection also determines which service board and notification procedure should take place pertaining to the service request.

A user may also write a summary of the SR in the **Summary** field to describe SR in their own words and a detailed description of the problem in the **Description of the problem** field.

Other important fields that the user can access are Required Date, Emergency, P O Number.

**Required Date:** Date the user would like the service request to be completed.

**Emergency check box:** is used to mark a service request as urgent or of a higher priority than normal. The text Emergency will also be appended onto the summary and into the internal notes. Accordingly the notifications are sent to the appropriate person(s).

**P O Number:** This number is entered by a contact to signify they are ready to pay for this SR and that the following P O Number should be mentioned to charge against the service request.

Portal screen to enter new service request

Save Changes

Refresh

Signoff Form

Hours Worked Internally: 0

New service record for Integral Advisors, LLC

What type of support issue are you having?: (select below)

I have a problem (Mission Control customer)

Contact: Rick Adams

Phone: (763) 852-1600 Ext:

Email: Rick.Adams@IntegralAdvisors.com

Address: 7900 Chesshire Ct. N.

Maple Grove MN 55311

Reqd Date: 9/15/06 Emergency:

PO Number:

Summary: Exchange Server Down

Description of Problem:

Rebooted after installing critical patches and it now it is not responding.

## Edit view of a Service Request

The user can also make additions in the existing service requests.

Hours Worked Internally:

**Last Updated:** Fri Aug 18 15:21:45 CDT 2006 by RAdams    **Status:**     **PO:**

Summary: Exchange Server Down-EMERGENCY

### Problem Description:

-RAdams/08-18-06/3:18pm- Worked with customer to reboot. Then RDP'd into server and verify configuration. Everything seemed alright. Customer confirmed that everything is working. Will check in with customer tomorrow morning. Rebooted after installing critical patches and it now it is not responding.

Add to Problem Description:

### Resolution:

Add to Resolution:

**Documents** [Add New Document](#) [Refresh](#)

The screen allows the client to view status of service request and make additions to the problem description and the resolution. Text for already added problem description and resolution texts in fields cannot be modified. Text that is appended will be at the top and will have a date/time stamp along with the name of the person who entered the information. It is also possible to add documents against a SR. Once attached these documents can be viewed by the users.

## My Company's Entries

This is the initial list view of all the service requests for that company. It will be restricted for non-administrator users/contacts to only their records based on the contact field. However, administrators will be able to view all service requests valid for his company.

### Portal screen showing initial list view

The screenshot shows a web portal interface. On the left, there is a sidebar with 'Logged In As Rick Adams' and 'Log Out'. Below that is 'Our Statistics' showing 0 Open Requests, 0 Total for This Month, and 4 Total for This Year. The main content area has a navigation bar with 'Service Entry', 'Company's Entries', 'Knowledgebase', 'Members', 'Invoice Search', 'Reports', and 'Setup'. Below the navigation bar, there is a table of service requests. The table has columns for SR, Summary, Contact, Entered, Status, Updated, Assigned, Reqd, and Closed. The first row is highlighted in yellow and shows SR 1789 for 'Exchange Server Down-EMERGENCY' by Rick Adams, entered on 8/18/2006, with a status of 'Waiting...' and updated on 8/18/2006. The second row shows SR 1053 for 'Repair on HP LaserJet 8200 Se...' by Rick Adams, entered on 7/26/2006, with a status of 'Closed' and updated on 7/28/2006. The third row shows SR 463 for 'Microsoft Office question' by Rick Adams, entered on 6/23/2006, with a status of 'Closed' and updated on 6/23/2006. The fourth row shows SR 458 for 'Exchange Server down' by Rick Adams, entered on 6/23/2006, with a status of 'Closed' and updated on 8/18/2006. The fifth row shows SR 451 for 'Wireless LAN Installation and...' by Rick Adams, entered on 6/23/2006, with a status of 'Closed' and updated on 6/23/2006. A 'Show all rec' button is visible at the end of the table.

SR	Summary	Contact	Entered	Status	Updated	Assigned	Reqd	Closed
1789	<a href="#">Exchange Server Down-EMERGENCY</a>	Rick Adams	8/18/2006	Waiting...	8/18/2006		9/15/2006	-
1053	<a href="#">Repair on HP LaserJet 8200 Se...</a>	Rick Adams	7/26/2006	Closed	7/28/2006		-	7/28/2006
463	<a href="#">Microsoft Office question</a>	Rick Adams	6/23/2006	Closed	6/23/2006		-	6/23/2006
458	<a href="#">Exchange Server down</a>	Rick Adams	6/23/2006	Closed	8/18/2006		6/21/2006	6/23/2006
451	<a href="#">Wireless LAN Installation and...</a>	Rick Adams	6/23/2006	Closed	6/23/2006		6/23/2006	6/23/2006

It displays following details of a service request:

- **Summary:** A brief description of the service request.
- **Contact:** The name of the contact that created the service request.
- **Entered:** Date service request was entered
- **Status:** Various statuses a service request must go to be completed.
- **Updated:** Displays the last date the service request was updated.
- **Assigned:** Shows the resources that are assigned to a service request.
- **Reqd Date:** The Required Date is the date this service request has to be completed.
- **Closed by:** Displays open, closed or all service records

**Add:** User has the option to add a new service request.

**Search:** User has the option of searching for a SR depending upon various parameters. For example: A user can narrow down their search for a particular SR with status new by writing word new in the status field and clicking on search.

**Clear:** A user may like to make multiple searches depending upon various parameters and Clear is used to clear out the parameter values from the fields in order to make new searches.

**Next and Previous:** These are used to scroll to next or previous pages.

## Members

Member maintenance is located by clicking on the Members icon. Clients can edit current users, i.e. contact information, user rights, etc. In addition, new contacts can be created as well from this board.

Contact	Email	Security	Disabled
<a href="#">Paul Smaby</a>		6	
<a href="#">Rick Adams</a>	Rick.Adams@IntegralAdvisors.com	6	

## Knowledgebase Search

The Knowledgebase Search screen will allow user to search all service entries in the system.

Searches can be performed with all of the entered keywords, or with any of the keywords, or with an exact phrase depending on what option is chosen from the Look For drop down box. User can also type in search words.

Depending upon the search fields, all the published service request or all the service requests valid for a user are displayed. An administrator can see all service requests for his company.

**Search the Knowledgebase** [Show/Hide Search Criteria](#)

Enter your search criteria in the boxes on the right.

Look for:  Results per page:

Search words:

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**Search Results**

Your search for **Exchange** found **2** matches. **1** through **2** are listed below.

Skip to page:

- [458 -- Exchange Server down](#)  
*Excerpt from this page:* Customer called in and reported that his Exchange 2003 server was rebooted and will not startup. ( last updated 8/18/2006 2:57:13 PM )
- [1789 -- Exchange Server Down-EMERGENCY](#)  
*Excerpt from this page:* -RAdams/08-18-06/3:18pm- Worked with customer to reboot. Then RDP'd into server and verify configuration. Everything seemed alright. Customer confirmed that everything is working. Will check in wi ( last updated 8/18/2006 3:21:45 PM )