

Welcome to the Client Portal!



Our Client Portal is a secure web site that gives you access to your records in our ticketing system. From the Client Portal, you can:

- Submit tickets directly into our system.
- Add notes and attachments to your tickets.
- Review work performed on your tickets.
- Update your contact information.

Getting started

1. Watch the video [Using Client Portal](#).
2. [Configure your browser settings](https://ww14.autotask.net/clientportal/Help/Content/WelcomeIntro/BrowserSettings.htm) if necessary. See the documentation at <https://ww14.autotask.net/clientportal/Help/Content/WelcomeIntro/BrowserSettings.htm>.
3. Read the section titled Navigating the Client Portal.
4. Log in to Client Portal and change your password.

Go to <https://ww14.autotask.net/ClientPortal/Login.aspx>.

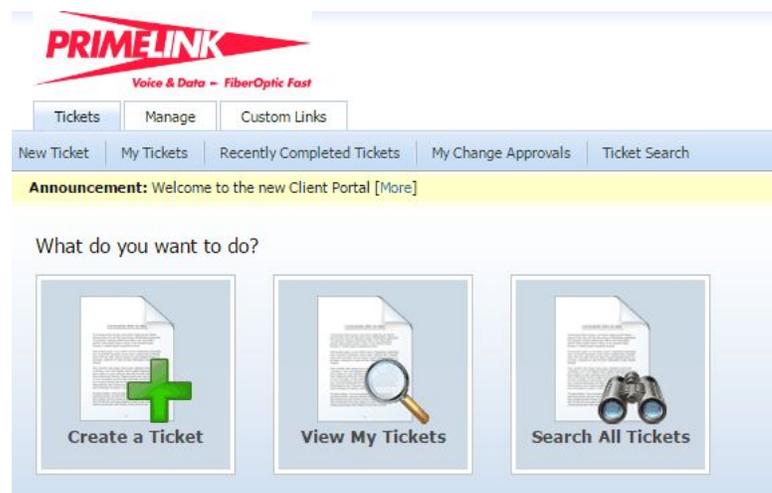
Enter the **user name** provided in your welcome email.

Enter the **password** provided in your welcome email.

Click **Login**.

Click the **Change Password** link at the top right of the Landing Page.

Client Portal Landing Page



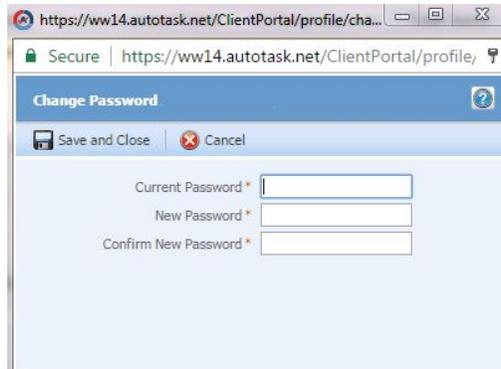
Type your current password.

Type a new password.

Type your new password again to confirm.

Click **Save & Close**.

Passwords must be between 5 and 50 alphanumeric characters. Spaces and single quotes are not allowed.



The screenshot shows a web browser window with the URL <https://ww14.autotask.net/ClientPortal/profile/cha...>. The browser's address bar shows 'Secure | https://ww14.autotask.net/ClientPortal/profile/'. The main content area displays a 'Change Password' dialog box. The dialog box has a blue header with the title 'Change Password' and a help icon. Below the header are two buttons: 'Save and Close' and 'Cancel'. The main area of the dialog box contains three input fields, each with a red asterisk indicating a required field: 'Current Password *', 'New Password *', and 'Confirm New Password *'.

Navigating the Client Portal:

You can choose to have the portal store your log-in credentials for future visits.

- Select *Remember My User Name* to have Client Portal automatically populate this field when you access the log-in page. You will have to specify your password.
- Select *Keep Me Logged-in on this Computer* to have Client Portal automatically populate both fields when you access the log-in page. You just click LOGIN.

Tickets

My Tickets: All open tickets you submitted or are a contact or resource on appear on the My Tickets page. Here, you can review our progress on the issue, and view any notes or attachments we have added, and add your own notes.

You can find other tickets using the pre-configured ticket filters on the Tickets drop-down menu and sub-navigation bar. You can also search for tickets by keyword or ticket number using the Ticket Search.

Custom Links: The Custom Links tab provides a drop-down menu for helpful links that we have provided:

Announcement: Within the Client Portal, you will notice the Announcement headline in the bar below the tabs and sub-navigation bar. This links to information from us, such as system outage notices or other important information that we want you to know. Click the [More] link to view the full announcement.

Create a ticket

Click the **Create a Ticket** button on the Landing Page, or click the Tickets tab and select New Ticket.

Request Type: Select the most appropriate request type. When you make your selection, the page may refresh and request type-specific follow-up questions may be displayed. Please enter as much information as possible. This will help us assign the right technicians to your service request and will speed up the resolution.

Ticket Title: Type a title for your ticket. Make this title as clear as possible to communicate your issue.

Description: Type a description of the issue. Include as much detail as you can, including what the problem is, how to replicate the issue (if applicable), and any other important details.

Ticket Priority: Select the best priority that pertains to your issue.

Ticket Contact: Defaults to your name, but you can select a different contact. This is the person that we will contact if we need additional information. The contact's email address and phone number will be displayed, but cannot be edited.

Follow-up Questions: Answer any follow-up questions that appear. Not all request types will have questions. These are used to help us gather important information from you up front, so we can begin working on the issue as quickly as possible.

Click **Save** when you are finished. The ticket is now submitted.

You can check the status of your ticket any time through the portal, using the My Tickets, Open Tickets, or Find Tickets search options.

View Existing Tickets

You can view existing tickets using the **"View My Tickets"** button on the Landing Page, or by clicking the **Tickets** tab, then **My Tickets**.

Your tickets will be displayed in a grid format. The grids in which tickets are displayed are very flexible. You can add, remove, reorder, sort, and filter on columns. The Advanced Filter provides detailed search criteria for locating specific tickets. Information from any of the ticket grids can be exported to a PDF or csv file.

Add, remove and reorder columns

1. Click the **Column Chooser** icon. A window that displays available and selected columns will open. To add an available column, select it and click the right arrow. It will be added to the Selected list. To remove a column, select it and click the left arrow. It will be added to the Available list. To reorder the columns, highlight a selected column and click the up or down arrow.
2. Click **Save and Close**. Outside of the column chooser, you can also click on a column header and drag the column to a new location. The Priority column (for Taskfire users, Service Provider Priority) is only available to users with security level permission to view Priority.

Use advanced filtering

1. Click the **Advanced Filter** icon on any ticket grid.
2. For each column you wish to filter on, select a filter type (if necessary), an operator, and the values.

3. Click **Apply Filter**. This will return you to the ticket grid, with your new filter applied.
4. To modify the filter, click the **Edit** link at the top of the grid.
5. To clear the filter, click the **Clear** link.

To view a ticket on any ticket grid, click the magnifying glass on a ticket row.

TICKET NUMBER	COMPANY	TICKET TITLE	CREATE DATE
T20170323.0001			03/23/2017
T20170323.0002			03/23/2017
T20170323.0003			03/23/2017
T20170324.0001			03/24/2017

You will see the following options on the taskbar of a ticket:



Add Note: You can add a note to any ticket you can view. These notes can be viewed by our internal and service provider resources.

Add Attachment: You can add an attachment to any ticket they can view. These attachments can be viewed by our internal and service provider resources

Print: To print the ticket view, click Print.

Add a Note to a Ticket

Find the ticket to which you would like to add a note and open it. 2. On the Ticket View page, click Add Note.

Title: Type a title for your note. Make this title as clear as possible to communicate your update to the ticket.

Note: Type a with any details you wish to add to the ticket (for example, additional information about the issue or changes that have occurred since you first reported the issue).

Notify the Resources on this ticket: Leave this box checked to notify our resources assigned to the ticket.

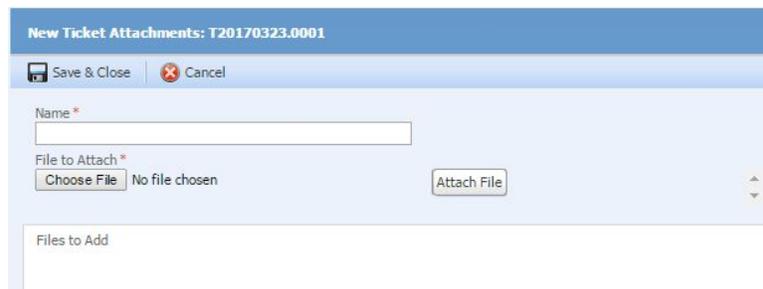
Enter email addresses of other recipients: If you enter any email address, the contents of the note will be sent to the recipients as an email. They do not have to be Client Portal users.

Click **Save** to add the note, or click **Cancel**.

Add an attachment to a ticket:

An attachment is a file that is linked to a ticket, such as a screen shot of an error message or a Word document that provides background information. The file size for uploaded attachments is limited to 10 MB. For security reasons, some file types are not accepted for upload.

Find the ticket to which you would like to add a note and open it. 2. On the Ticket View page, click **Add Attachment**.



The screenshot shows a web interface for adding attachments to a ticket. The title bar reads "New Ticket Attachments: T20170323.0001". Below the title bar are two buttons: "Save & Close" and "Cancel". The main form area contains a "Name *" field, a "File to Attach *" section with a "Choose File" button and "No file chosen" text, and an "Attach File" button. Below these is a "Files to Add" list.

Enter a Name for your attachment.

Click **Choose File** to locate and select your attachment.

Click **Attach File**. It will appear on the list at the bottom of the page.

To create additional attachments for this item, repeat steps 2 - 4.

To remove an attachment, click the **Delete** icon next to it in the list.

When you have added all attachments, click **Save & Close**. The files will be uploaded and can be accessed by everyone with access to the ticket.

Update Your Contact Information

Click the **Edit Profile** link at the top of the Client Portal page to open the User Profile window.

Update your contact information and click Save and Close.

User Profile

Save and Close Cancel

Profile information

Prefix
▼

First Name *
Jane

Suffix
▼

Title

Office Phone
518-324-5465

Extension

Fax Number

Email Address *
abc123@primelink1.net

Last Name *
Doe

Mobile Number
518-324-5465

Additional Options Available in Client Portal

- Export ticket information to PDF, CSV or Excel format.
- If you are a Client Portal Manager for your company, you may also:
 - Create portal accounts for other users in your company.
 - View all tickets for your company submitted by any user in your company.