



CUSTOMER PORTAL

How to use the Customer Portal

CONTENTS

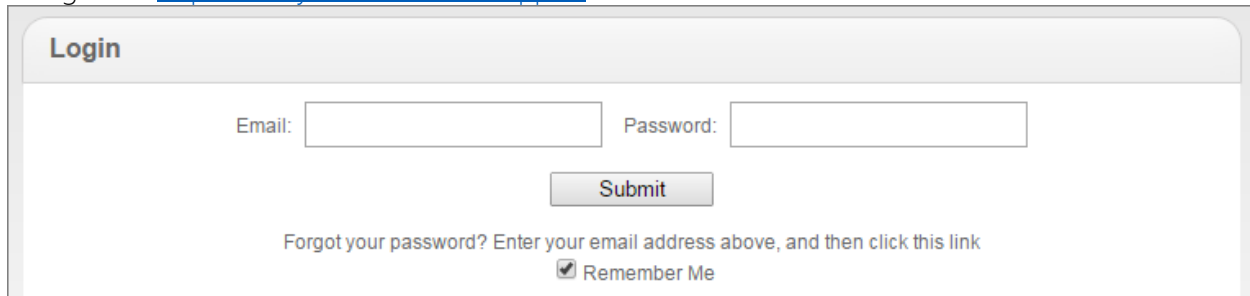
How to Use the Systech Client Portal.....	3
Login to the Customer Portal	3
Log Out.....	3
My Account.....	4
Navigate the Customer Portal	4
Create Ticket Button	5
Tickets Tab.....	6
Projects Tab	7
Recommendations Tab.....	7
Knowledge Base Tab.....	8
Reports Tab.....	8
Account	9
Invoices Screen.....	9
Users Screen	10
Agreements Screen	10

HOW TO USE THE SYSTECH CLIENT PORTAL

This section will show you how to interact with the Systech Customer Portal. Should you have further questions about your Customer Portal, please reach out to your dedicated account representative for additional information.

LOGIN TO THE CUSTOMER PORTAL

1. Navigate to <https://cw.systechinfo.com/support>



Login

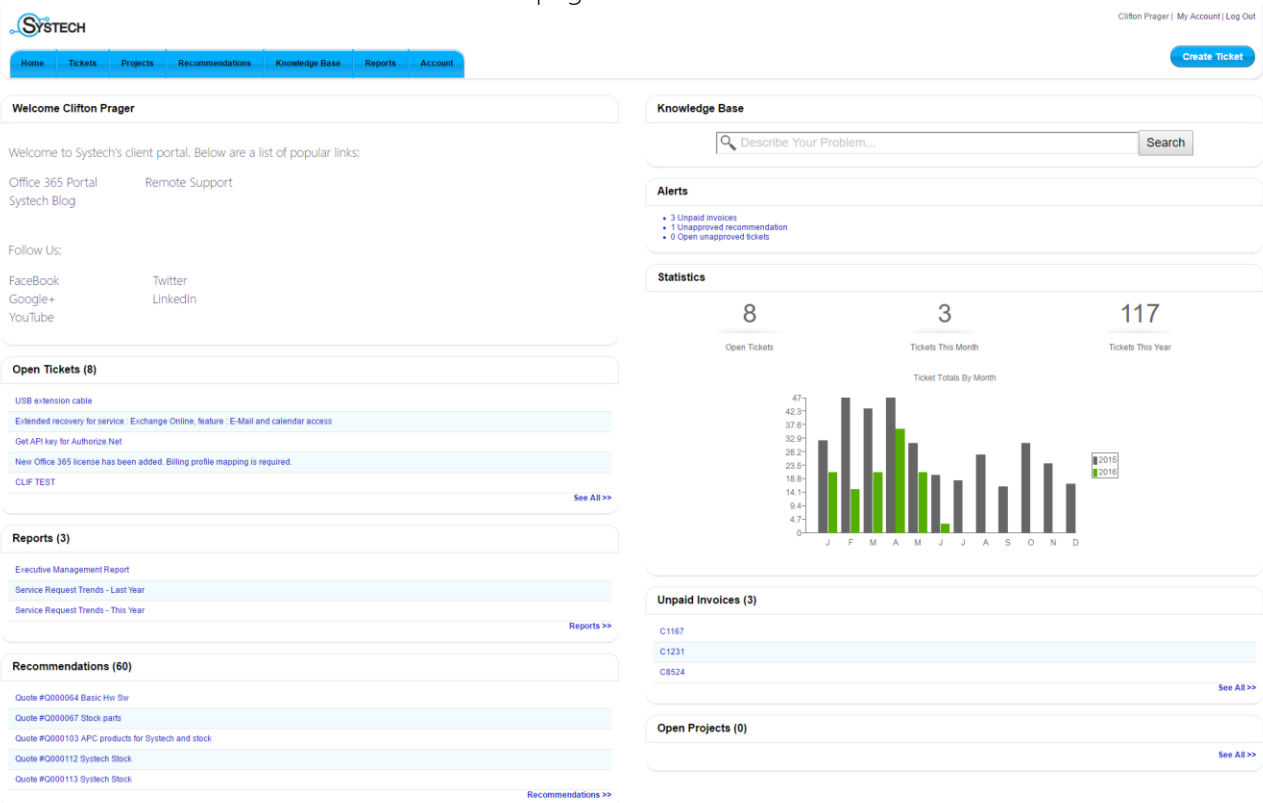
Email: Password:

Submit

Forgot your password? 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:



Clifton Prager | My Account | Log Out

Home Tickets Projects Recommendations Knowledge Base Reports Account **Create Ticket**

Welcome Clifton Prager

Welcome to Systech's client portal. Below are a list of popular links:

Office 365 Portal Remote Support
Systech Blog

Follow Us:
FaceBook Twitter
Google+ LinkedIn
YouTube

Open Tickets (8)

USB extension cable
Extended recovery for service - Exchange Online, feature - E-Mail and calendar access
Get API key for Authorize.Net
New Office 365 license has been added. Billing profile mapping is required.
CLIF TEST [See All >>](#)

Reports (3)

Executive Management Report
Service Request Trends - Last Year
Service Request Trends - This Year [Reports >>](#)

Recommendations (60)

Quote #Q000064 Basic Hvr Svr
Quote #Q000067 Stock parts
Quote #Q000103 APC products for Systech and stock
Quote #Q000112 Systech Stock
Quote #Q000113 Systech Stock [Recommendations >>](#)

Knowledge Base

Describe Your Problem... **Search**

Alerts

- 3 Unpaid Invoices
- 1 Unapproved recommendation
- 0 Open unapproved tickets

Statistics

8 Open Tickets 3 Tickets This Month 117 Tickets This Year

Ticket Totals By Month

Month	2015	2016
J	18.8	23.5
F	14.1	23.5
M	42.3	23.5
A	37.6	23.5
M	42.3	23.5
J	18.8	23.5
J	18.8	23.5
A	18.8	23.5
S	18.8	23.5
O	18.8	23.5
N	18.8	23.5
D	18.8	23.5

Unpaid Invoices (3)

C1187
C1231
C8524 [See All >>](#)

Open Projects (0) [See All >>](#)

LOG OUT

When you are finished using the Systech 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 Systech Customer Portal screen. This will enable you to edit your account details.

The screenshot shows a web browser window titled "My Account" with a "Last Updated @ 2/13/15" timestamp. The form contains the following fields and controls:

- 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:

At the bottom of the form are three buttons: , , and .

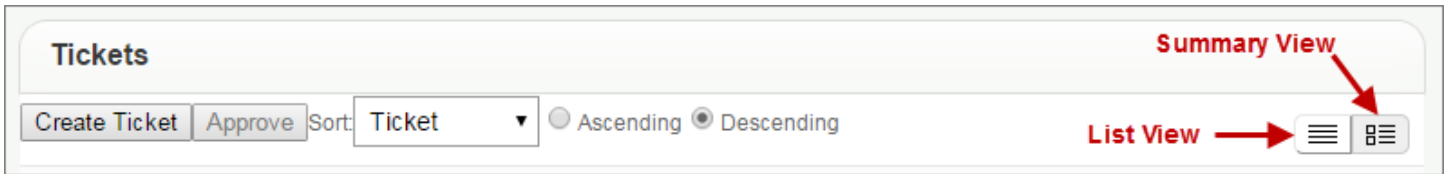
NAVIGATE THE CUSTOMER PORTAL

The following information will assist you with successfully navigating the Systech Customer Portal. Most of the Systech Customer Portal tabs will have a sort menu that will enable you to filter and narrow down your searches.

The screenshot shows a sort menu with the following elements:

- Sort: - Ascending:
- Descending:

Most of the Systech 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 a single row.



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, and email address will automatically populate on the ticket.

The following is a list of field descriptions when you create a new ticket.

Create Ticket		
Step 1	Select Service Needed	Use the carousel to select the type of Service Request to enter.
Step 2	Title	Enter a summary for the problem or issue.
	Problem Description	Enter a complete description of the problem or issue.
	Attach Document	Use the Choose File field to browse for a document to attach. In the Title field, enter a title for the attachment.
	Due Date	Enter the date you would like the service ticket to be completed.
	PO Number	If applicable enter a Purchase Order number to authorize the billing of this service ticket.
Step 3	Contact Details	These fields will automatically populate on the ticket.

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

TICKETS TAB

The Ticket Tab enables you to view all service tickets for your company. Certain security levels may be necessary in order to view all valid service tickets. From this screen, you can select to open a new service request by selecting the **Create Ticket** button.

You can also use the **Search By** section to assist in filtering results.

Search By

Summary

Status
 Open
 Closed

Ticket#

Contact

[Show More](#)

Click on the **Summary Link** to review the details or add information.

Tickets				
<input type="button" value="Create Ticket"/>	<input type="button" value="Approve"/>	Sort: Ticket ▼	<input type="radio"/> Ascending <input checked="" type="radio"/> Descending	<input type="button" value="List"/> <input type="button" value="Grid"/>
<input type="checkbox"/>	ChrisCraft/Past Due: Inv#Agr-70392 for \$20.00 was due 01/11/2012	147801 Ticket	Linda Resources	Type
	Thu 2/12/2015/2:43 PM EST/ Andy Bell- Chris Craft Boats Agr-70392 \$20.00 is past due Invoice Due Date: 01/12/2012 Invoice Billing Terms: Net ... Andy, Feb 13, 2015	No SLA SLA Name Waiting on Client Response Status		
<input type="checkbox"/>	ChrisCraft/Past Due: Inv#Agr-70391 for \$150.00 was due 01/12/2012	147800 Ticket	Linda Resources	Type

PROJECTS TAB

The **Projects Tab** enables you to see all projects for your company. You are restricted to view only your records, however, certain security levels may be necessary to view all valid Projects for your company. To view information about a Project, click on the Project Name. The Work Plan will then display on a new screen where you can click into the Project Tickets to view or update information.

Search By

Project Name

Status
 Open
 Closed

Type
 App Development
 Cloud Services
 Consulting
 Implementations
 Managed Services

Updated
All Dates

Description

Projects

Sort: Project Name Ascending Descending

No results to display.

0-0 of 0

Items Per Page 10

RECOMMENDATIONS TAB

This tab enables you to display recommendations that have been sent to the portal for review. Consider thinking of recommendations as quotes. If a member from Systech provides a recommendation and places it in a status that is visible in the Systech Customer Portal, then you can review and approve or reject the recommendation through the portal.

To accept or reject a recommendation, click on the summary link.

Search By

Recommendation Name

Status
 Open
 Closed

Updated
All Dates

Sales Rep

Contact

Recommendations

Sort: Recommendation Name Ascending Descending

Quote #001707v1 Memory for ESX Hosts	Jack Prager Sales Rep	Jun 24, 2015 Updated
	Jack Prager Contact	Won Status
Quote #Q000064 Basic Hw Sw	Jack Prager Sales Rep	Jun 12, 2012 Updated
	Jack Prager Contact	Won Status
Quote #Q000067 Stock parts	Jack Prager Sales Rep	Jun 25, 2012 Updated
	Jack Prager Contact	Won Status
Quote #Q000103 APC products for Systech and stock	Jack Prager Sales Rep	Sep 17, 2012 Updated
	Jack Prager Contact	Won Status

KNOWLEDGE BASE TAB

The Knowledge Base tab enables you to search all service entries in the system. Enter keywords and select a scope to search.

Home Tickets Projects Recommendations Knowledge Base Reports Account Create Ticket

Knowledge Base

 Search

Scope
 1 Year 2 Years 3 Years All

Results

[How to handle Travel charge and time entry for travel](#)
Thu 6/7/2012/9:44 AM CDT/ Randall Van Mill (time)- solved the missing invoice description -caption note for nonbillable hours. invoice totals may not be resolved. start and end date added witho...

[Re: Exoprise Systems: Follow-Up](#)
Thu 3/7/2013/3:46 PM CDT/ Welcome to the Team, We are pleased to inform you that we've received and executed your signed partner agreement and would like...

[Test restore Fortinet 60B](#)
Fri 11/1/2013/11:43 AM CDT/ Brian Morrison (time)- Done forever ago. Reviewing board. Closed. Thu 8/15/2013/2:12 PM CDT/ Brian Morrison- To test that automatic backups are functioning co...

[MailProtector changes \(The 208.83.76.0/24 range is scheduled to expire 3/1/2016.\)](#)
Mon 6/29/2015/9:21 AM CDT/ Randall Van Mill (time)- create new tickets for MP domains and provide information to process these. Set new activity scheduled record for post 3/1/2016 to remind...

[Test - using a template for service for client computer setups](#)

REPORTS TAB

You can view reports based on your security level. Your company administrators can view all listed reports for their company. The following are custom reports that you can create and share: Service Request Trends This Year, Service Request Trends Last Year, and Executive Management Report.

Reports

Portal Reports

- [Executive Management Report](#)
- [Service Request Trends - Last Year](#)
- [Service Request Trends - This Year](#)

Executive Management Report

ManagementSummary_Button 1 / 1



Management Summary

Prepared For: Systech Information Services, Inc.
Created On: 06/06/2016
Period :05/07/2016 - 06/06/2016

Company Details	
Contact:	Randall Van Mill
Account Manager:	Not assigned
Total Windows Servers:	0
Total Windows Workstations:	0

Service Request Statistics	
Escalated Items:	
Server Offline Alerts:	0
Server Disk Space Low:	3
Failed Backup Jobs:	0
Total Closed Helpdesk Tickets:	112
Non-Escalated Items:	
Total Notifications:	2

Business Continuity Indicators	
Network Uptime:	
Server Availability:	100%
Threats Removed:	
Windows Patches Installed:	1260
Resources Utilization:	
Average CPU Utilization:	4%
Average Memory Utilization:	55%
Automated Systems Run:	
Disk Cleanups:	296
Disk Defragmentations:	3

Network Health

97%

Uptime Grade:	100
Patch Grade:	89
Internet Connectivity:	100
Disk Utilization:	100

Computer Security Patches



Fully Patched Machines:	21
Missing >5 Patches:	2
Missing 3-2 Patches:	2
Missing 2-5 Patches:	2

ACCOUNT

In the Account view, you can view agreements, Invoices, and update contact information for your company.

INVOICES SCREEN

The Invoices tab displays invoices that are available. Selecting the invoice number link will open the invoice for you to review. You also have the option to pay your invoices by selecting the **Pay Now** button.


Invoices				
Sort: Balance	<input type="radio"/> Ascending <input checked="" type="radio"/> Descending	Aging Report  		
TB-70469	Feb 12, 2015 <small>Invoice Date</small>	1 Day <small>Age</small>	\$4,200.00 <small>Amount</small>	\$4,200.00 <small>Invoice Balance</small>
Invoice for Project: Website Development	Standard <small>Type</small>			Mar 14, 2015 <small>Due Date</small>

Complete the following payment form and click **Submit**.

Description:

Total: US \$30.00

Payment Information



Card Number: * (enter number without spaces or dashes)

Expiration Date: * (mmyy)

Billing Information

Customer ID:

First Name: Last Name:

Company:

Address:

City:

State/Province: Zip/Postal Code:

Country:

Email:

Phone:

Fax:

Shipping Information

Copy Billing Information to Shipping Information

First Name: Last Name:

Company:

Address:

City:

State/Province: Zip/Postal Code:

Country:

USERS SCREEN

This view enables you to update company email addresses, phone numbers, and security levels, in addition to changing your password. If you have security rights, a list view of all the contacts for your company will be available. You can click into any contact information and update it. In addition, you can click the **Add New User** button to add a new user to the portal.

Home Tickets Projects Recommendations Knowledge Base Reports Account Create Ticket

Invoices
Users
Agreements

Search By
Status
 Enabled
 Disabled
Security Level
 1) End User
 2) Billing Contact
 3) Project Manager
 4) Site Manager
 5) Company Portal Administrator
Email
Last Updated
All Dates
Search Clear

Users
New User Disable User Sort: Name Ascending Descending

<input type="checkbox"/>	Gus Xydakis	gxydakis@systechinfo.com Email	Oct 22, 2015 Last Updated
<input type="checkbox"/>	Ryan Wozniak	rwozniak@systechinfo.com Email	Dec 2, 2014 Last Updated
<input type="checkbox"/>	sysadmin Wozniak	sysadmin@systechlab.com Email	May 13, 2016 Last Updated
<input type="checkbox"/>	Ryan Woz	rwoz@systechlab.com Email	May 13, 2016 Last Updated

Gus Xydakis [gxydakis@systechinfo.com](#) Email
1) End User Security Level Enabled Status

Ryan Wozniak [rwozniak@systechinfo.com](#) Email
1) End User Security Level Enabled Status

sysadmin Wozniak [sysadmin@systechlab.com](#) Email
1) End User Security Level Enabled Status

Ryan Woz [rwoz@systechlab.com](#) Email
1) End User Security Level Enabled Status

AGREEMENTS SCREEN

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

Search By
Name
Type
 Block Time - One Time
 Block Time - Recurring Monthly
 Cloud Help Desk Service
 Managed Antivirus Client
 Managed Backup Services
Balance
Is Exactly
Application Units
Any
Search Clear

Agreements
Sort: Name Ascending Descending

Office 365	Microsoft Office 365 / Product Type	May 12, 2016 Start
	Unlimited Balance	End

1-1 of 1 Items Per Page 10