

Customer Portal User Guide

The Customer portal is a user-friendly tool that allows users to log and manage their own tickets.

Power users can manage all tickets within their organisation, regardless of who logged them.

From within the Portal you can:

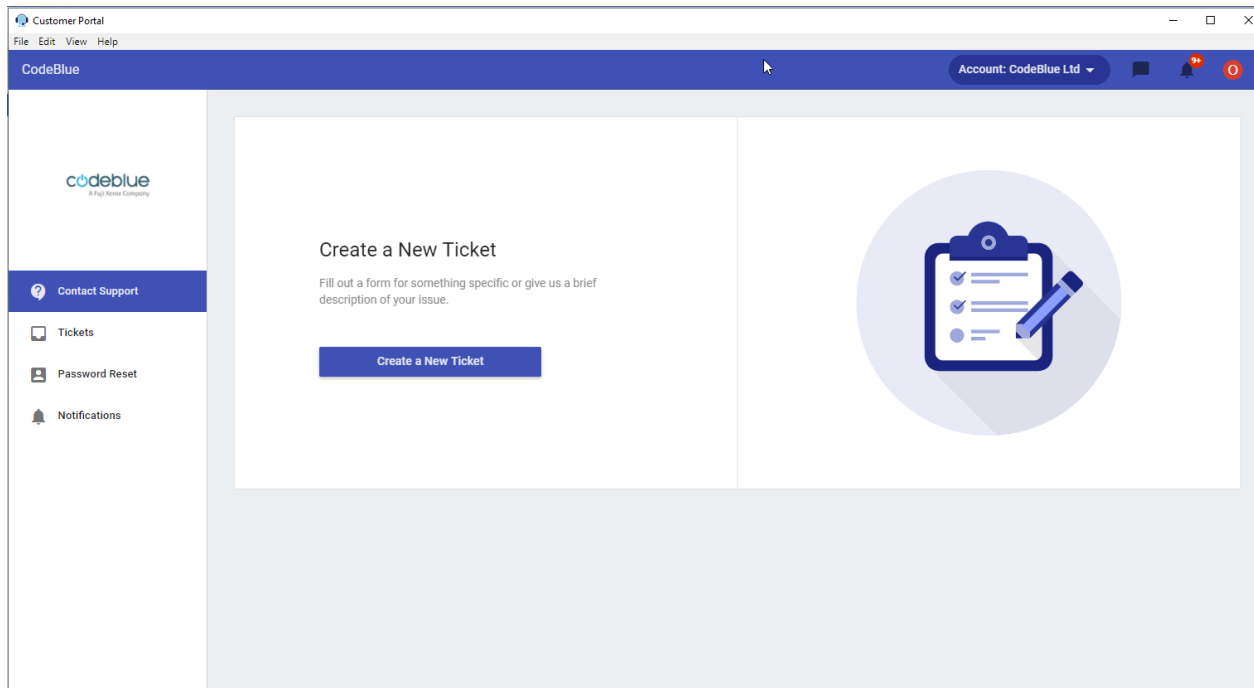
- Create a new ticket
- View your Open and Closed tickets
- Search for tickets (Please note: The search functionality is limited to ticket number or words within the Summary of the ticket i.e. not the body of the ticket.)
- View ticket notifications

Getting started...

To access the Customer Portal click on the **blue person with a headset on** icon in the System tray by the Clock on your computer.



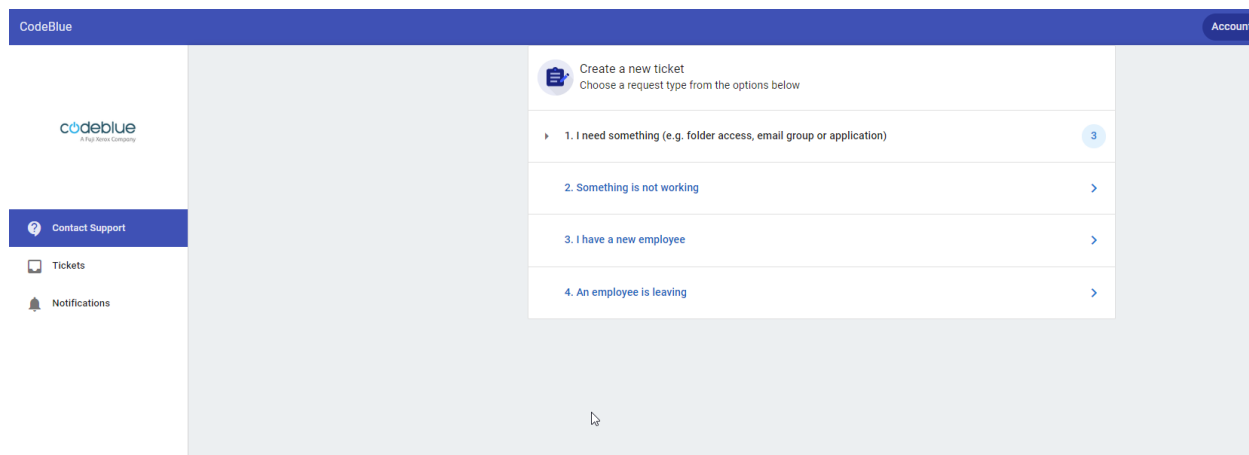
This will launch the Portal and present you with the screen below.



How to log a ticket:

1. Click on the 'Create a New Ticket' button to log a new ticket.
2. Where you have the option, click on the small arrow on the left of your selected option to pick the type of ticket you wish to log.

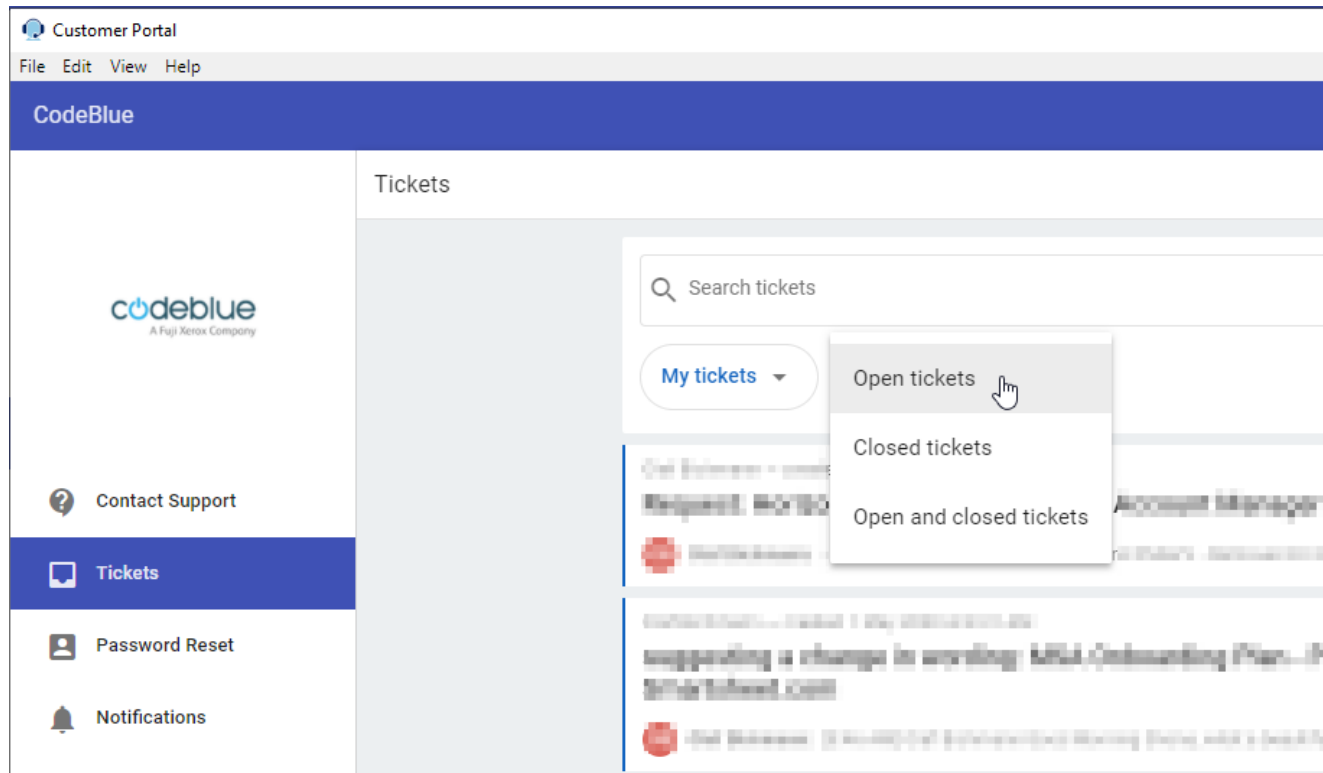
Note: Some of the menu options may differ.



View and update your own tickets

From the menu on the left you have visibility over the tickets you have logged. Here you can:


- View open and closed tickets and search for the tickets you have logged
 - *Note: you can only search by ticket number or text in the Summary of your ticket.i.e. search does not search the content in the body of the ticket*




View and update your own tickets

- View the Status (1) and progress (2) on a ticket in a simple timeline type view.
- From within a ticket you can request an update by adding a note (3).
- Close (4) your own ticket if you wish.
- Upload an attachment (5).
- Refresh your ticket information (6).
- Or even take a screenshot (7)

Ticket Owner

 **James Thomas**
[Change](#)

Assigned Technicians

 **Josh Gower**

Ticket Details

Priority
Priority 4 - Low


Status **1**
RTO



Board
Service Desk L1


Ticket Number
818394

Date Created
May 8, 2020 10:38:41 AM


Last Updated
May 8, 2020 10:39:26 AM

Password expired 

 **Print**  **6**



 **Josh Gower** added a note Today at 10:38 AM

Password expired




 **Josh Gower** added a note Today at 10:39 AM **2**

- Verified user via teams
- Reset password
- Confirmed working
- Closing

END OF TIMELINE

 **Reply**  **Close Ticket** **4**

Write your reply here **3**

5  **Attach Files**  **Take a Screenshot** **7**  **Reply**

Note: Only Power users can toggle between 'My tickets' and All tickets' giving them visibility across all tickets logged for their Company.

Notifications

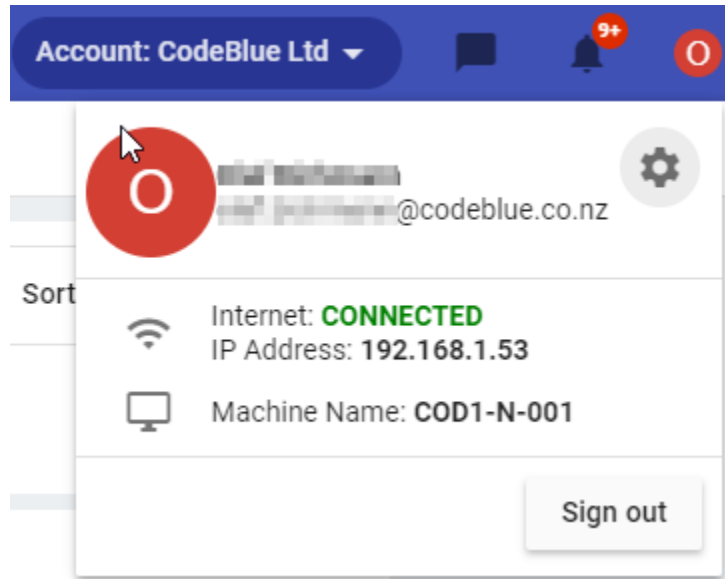
When a ticket is updated by Codeblue you receive a notification (1) - you can even respond or add a comment to your ticket by clicking 'Go to Ticket' (2)

The screenshot shows the CodeBlue Customer Portal interface. At the top, there is a navigation bar with the CodeBlue logo on the left and the account name 'CodeBlue Ltd' on the right. Below the navigation bar, there is a sidebar with menu items: 'Contact Support', 'Tickets', 'Password Reset', and 'Notifications' (which is highlighted). The main content area is titled 'Notifications' and displays a notification card. The notification card has a title 'Ticket Updates' and a 'Dismiss All' button. The notification text reads: 'test #818500' and 'Note added to ticket 818500. your ticket has been updated!'. The notification is dated 'Today 11:27 AM'. There is a close button (X) and a 'Go to Ticket' button (with a right arrow) next to the notification. A red circle with the number '2' is overlaid on the 'Go to Ticket' button. A red circle with the number '1' is overlaid on the notification card. The CodeBlue logo is 'codeblue A Fuji Xerox Company'.

What is my computer name?

Sometimes the Service Desk will ask for your computer name to identify your machine.

Simply click on your initial at the top right of the Portal to display your machine name - you can also check if you have internet connectivity.



We are constantly looking to improve the portal and service to our customers, so please provide any feedback to us at the Service Desk on 0508 48 73 78 or servicedesk@codeblue.co.nz.