

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:

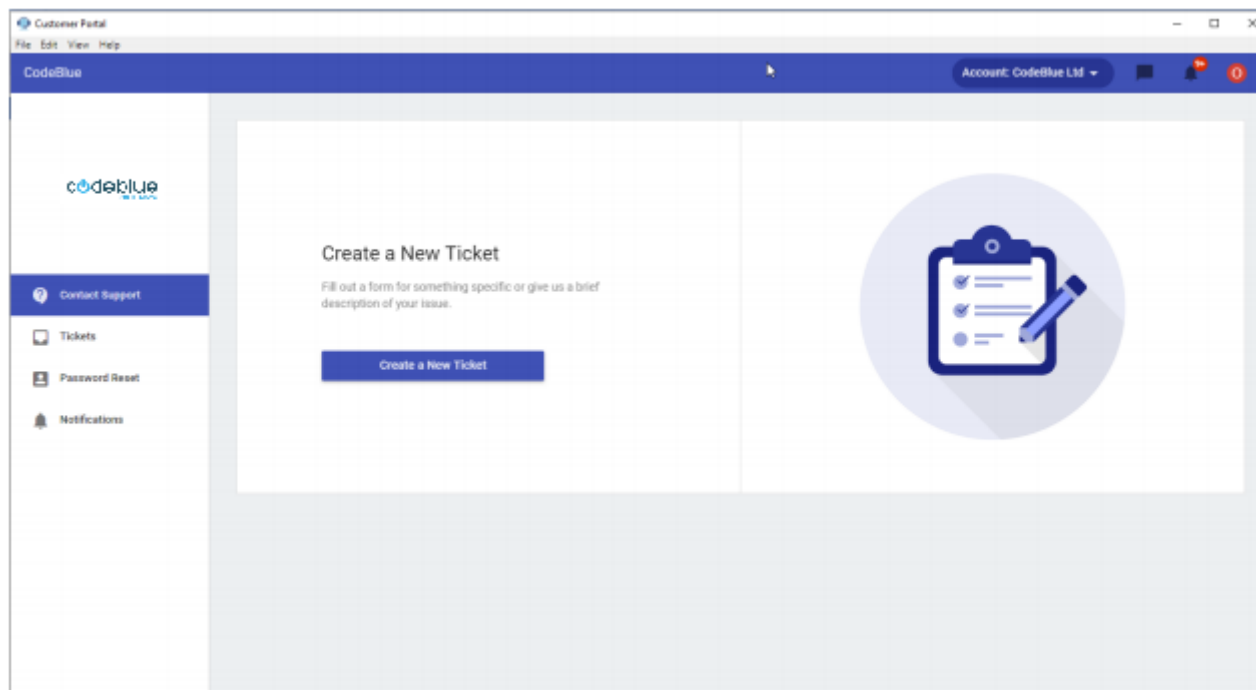
- Create a new ticket
- View your Open and Closed tickets
- Search for tickets (Please note: The search functionality is limited to ticket number or words within the Summary of the ticket i.e. not the body of the ticket.)
- View ticket notifications

Getting started...

To access the Customer Portal click on the **blue person with a headset on** icon on the bottom of your computer screen.



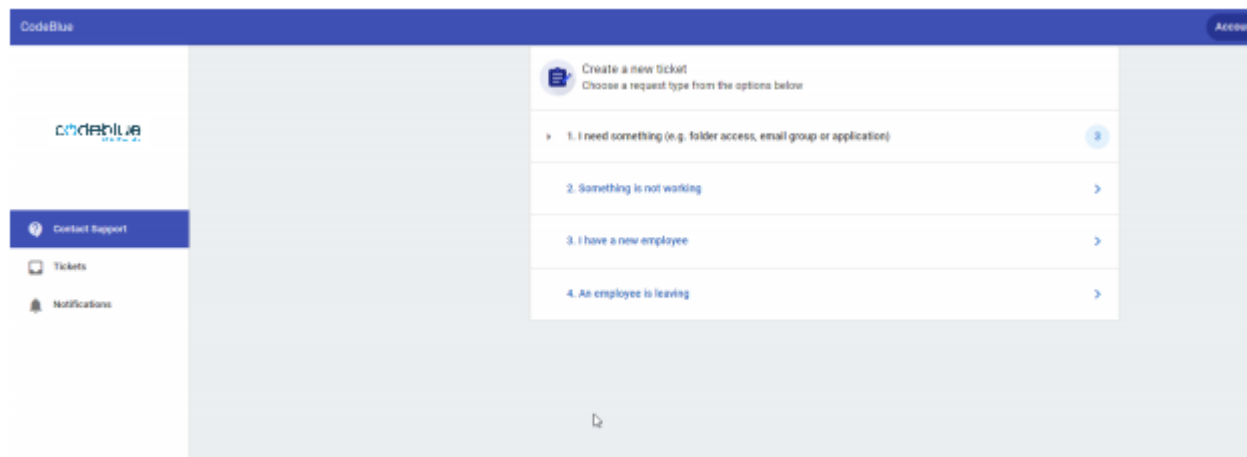
This will launch the Portal and present you with the screen below.



How to log a ticket:

1. Click on the "Create 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 select the type of ticket that you wish to log.

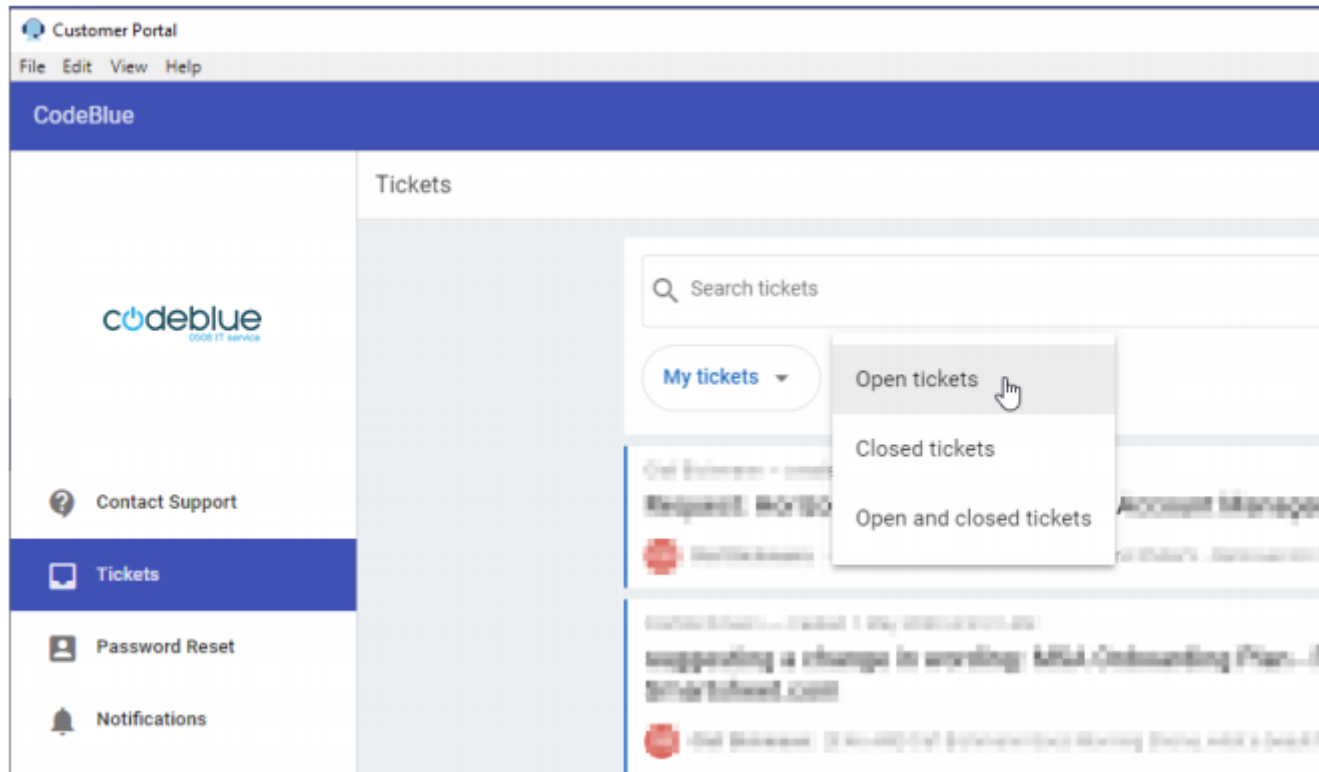
Note: Some of the menu options may differ.



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 that you can only search by ticket number or text in the Summary of your ticket i.e. the search function does not search the content in the body of the ticket.



- 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)

The screenshot displays a ticket management interface. On the left is a sidebar with the following information:

- Ticket Owner:** James Thomas (JT), with a [Change](#) link.
- Assigned Technicians:** Josh Gower (JG).
- Ticket Details:**
 - Priority:** Priority 4 - Low
 - Status:** RTO (1)
 - 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

The main content area shows the ticket title "Password expired" with an edit icon. In the top right corner, there are "Print" and "Refresh" icons, with a red circle containing the number "6" next to the refresh icon. The timeline contains two notes from Josh Gower (JG):

- Note 1: "Password expired" (10:38 AM).
- Note 2: "Verified user via teams", "Reset password", "Confirmed working", "Closing" (10:39 AM), with a red circle containing the number "2" next to the timestamp.

A horizontal line separates the notes from the bottom section, labeled "END OF TIMELINE". Below this line are two buttons: "Reply" (with a left arrow icon) and "Close Ticket" (with a downward arrow icon), with a red circle containing the number "4" next to the "Close Ticket" button. Below the buttons is a text input field with the placeholder "Write your reply here" and a red circle containing the number "3" next to it. At the bottom of the interface, there are two buttons: "Attach Files" (with a paperclip icon) and "Take a Screenshot" (with a camera icon), with a red circle containing the number "5" next to the "Attach Files" button and a red circle containing the number "7" next to the "Take a Screenshot" button. A "Reply" button with a left arrow icon is also visible on the right side of the bottom section.

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

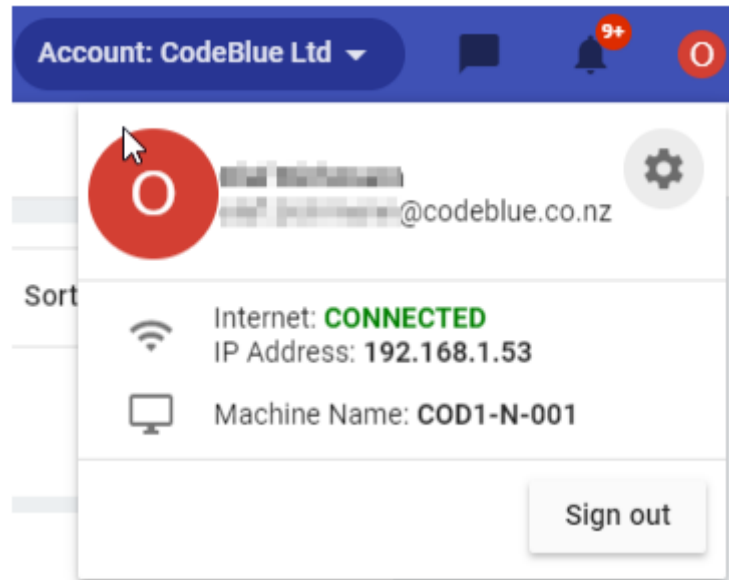
Notifications

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 'Account: CodeBlue Ltd' on the right. Below the navigation bar, the main content area is titled 'Notifications'. A notification card is displayed, titled 'Ticket Updates', with a 'Dismiss All' button in the top right corner. The notification content includes the text 'test #818500' and 'Note added to ticket 818500. your ticket has been updated!'. The notification is timestamped 'Today 11:27 AM'. In the bottom right corner of the notification card, there is a close button (X), a 'Go to Ticket' button (represented by a right-pointing arrow), and a red circular badge with the number '2'. A hand cursor is shown hovering over the 'Go to Ticket' button. On the left side of the page, there is a sidebar menu with options: 'Contact Support', 'Tickets', 'Password Reset', and 'Notifications' (which is highlighted in blue). A red circular badge with the number '1' is positioned above the 'Notifications' menu item.

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.