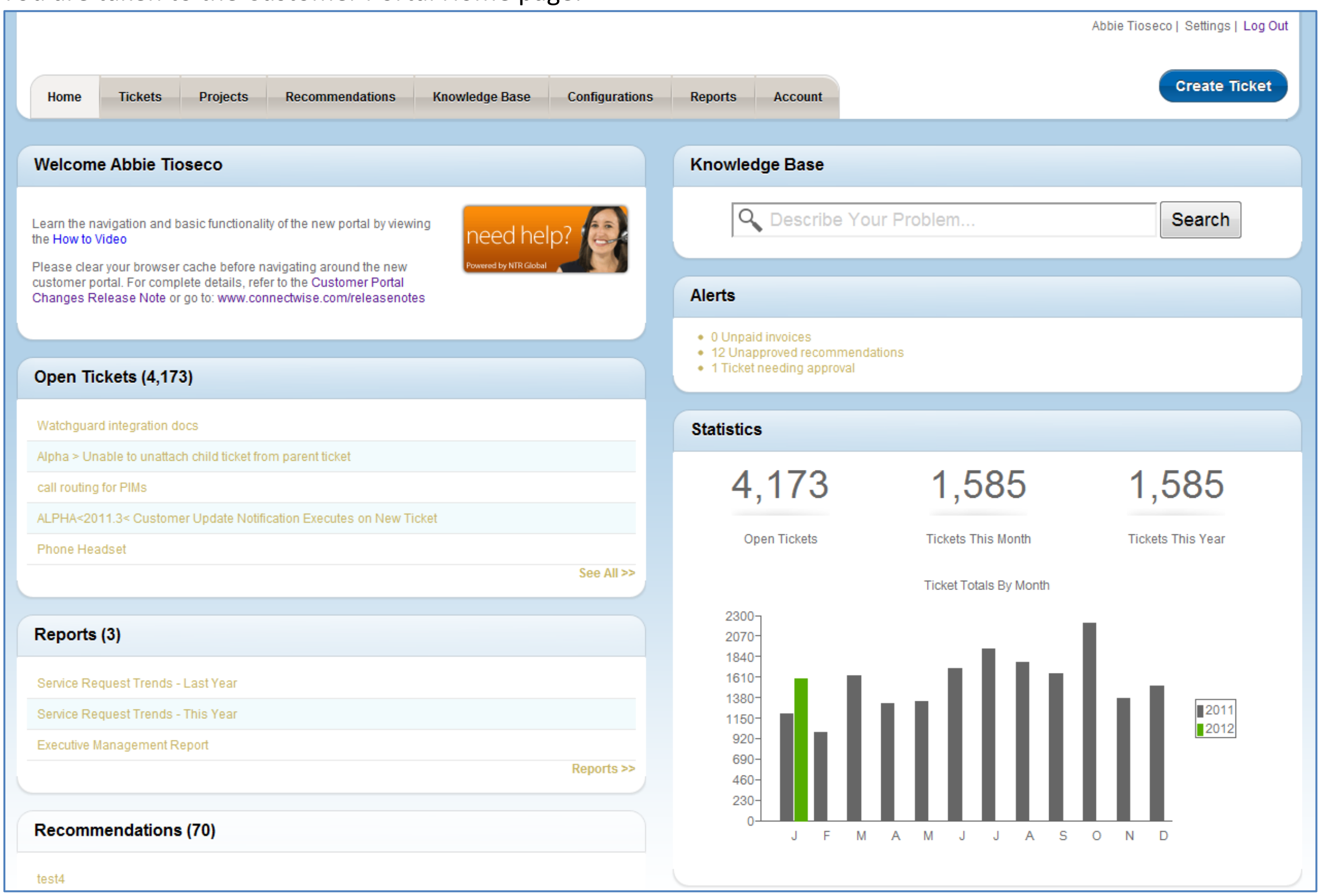
How to Use the Accudata Customer Portal

Contents

Log into the Customer Portal

1. Navigate to www.accudataservice.com

2. Enter your **Email** and **Password**.
3. Click **Login**.
4. You are taken to the Customer Portal Home page:

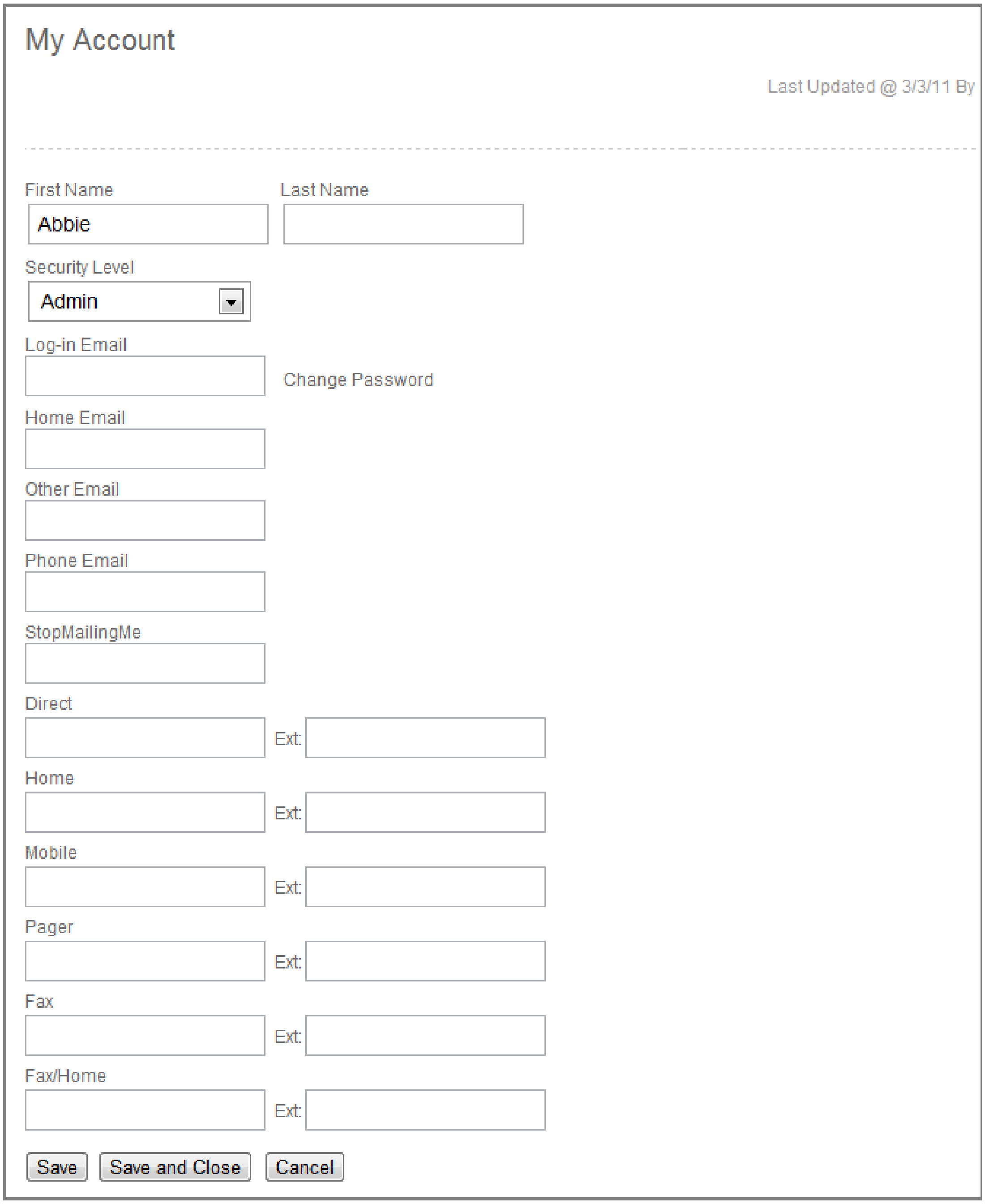


Log Out

When you are finished using the Customer Portal, click the **Log Out** link on the top right hand portion of the screen.

Settings

The **Settings** link is located at the top right hand portion of the Customer Portal Screen. It will enable you to edit your Account Details.

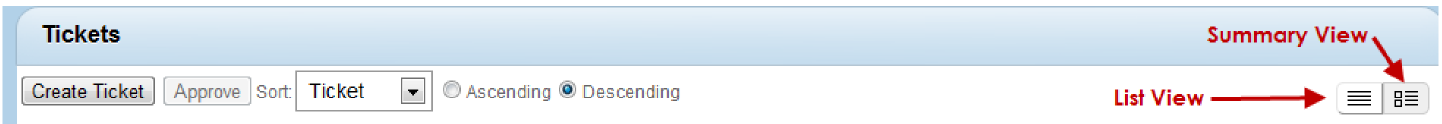


Navigating the Customer Portal

The following information will assist you in successfully navigating the customer portal.

Most of the Customer Portal Tabs will have a **Sort** menu that will enable you to filter and narrow down your searches.

Most of the 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 one 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 will automatically populate on the ticket.

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

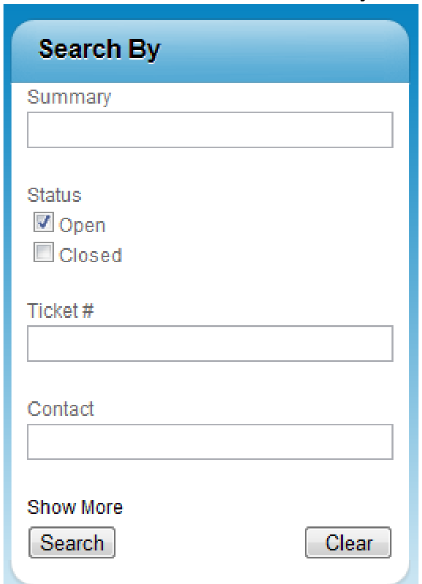
Select Service Needed	Use the carousel to select the type of Service Request to enter.
Due Date	Enter the date you would like the service ticket to be completed.
Emergency	Select this check box if the service request is an emergency.
PO Number	If applicable enter a Purchase Order number to authorize the billing of this service ticket.
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.

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

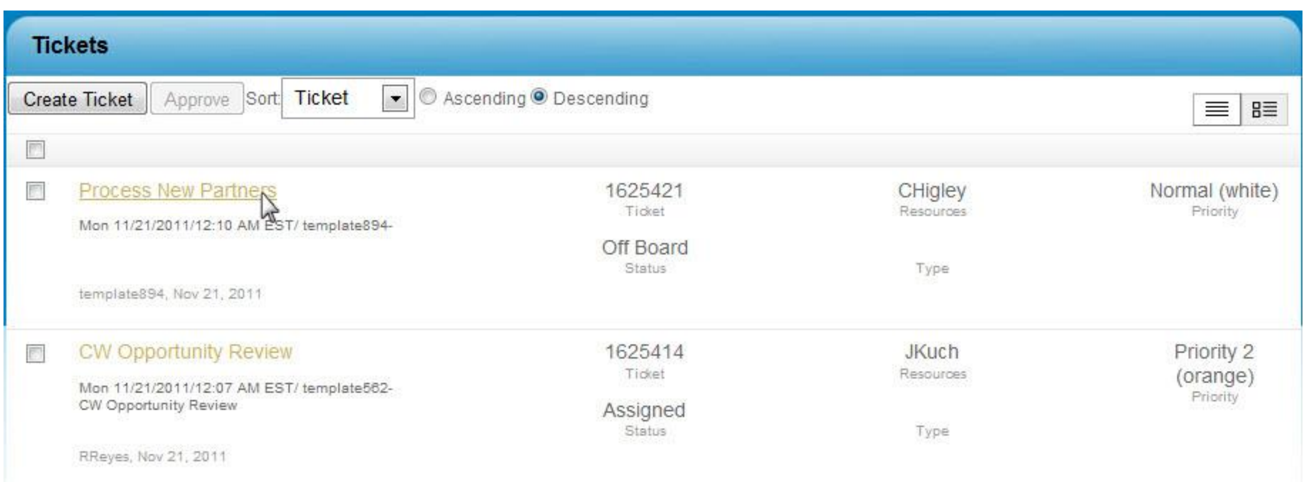
Tickets Tab

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.



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



Projects Tab

The Project 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 on where you can click into the Project Tickets to view or update information.

Recommendations Tab

This tab enables you to display recommendations that have been sent to the portal for review. Recommendations originate within ConnectWise and are sent to the Portal for client review. Consider thinking of recommendations as quotes. If a member in ConnectWise creates an Opportunity and places it in a status that is visible on the Customer Portal, you can review this Opportunity (recommendation) through the Portal.

To Accept or Reject a recommendation, click on the **Summary** link.

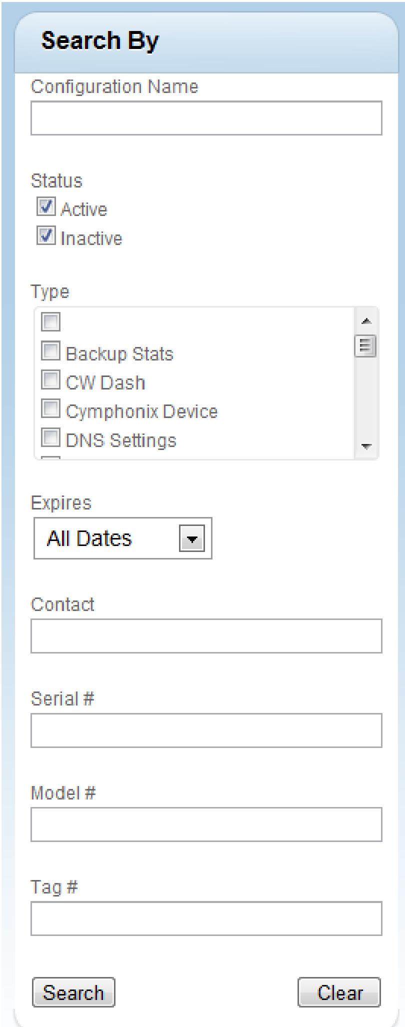
Knowledge Base Tab

The Knowledge Base Tab enables you to search all service entries in the system. Enter Key words and select a time period to search.

If you have Service Types that are predefined, you have the ability to answer the questions that are included in the Problem Description section. For example, if you have a new member starting in your company and you need to create credentials for the user, you would choose **Service Needed** in Step 1 and in Step 2 you would include all the contact's information, such a First Name, Last Name, Username, Password, Email address etc. This is where you would include all the details for a ticket to be created.

Configurations Tab

The Configurations Tab will show the list of devices and configurations associated with your company. You can Use the Search By area to filter and narrow down the configurations you are looking for.



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.

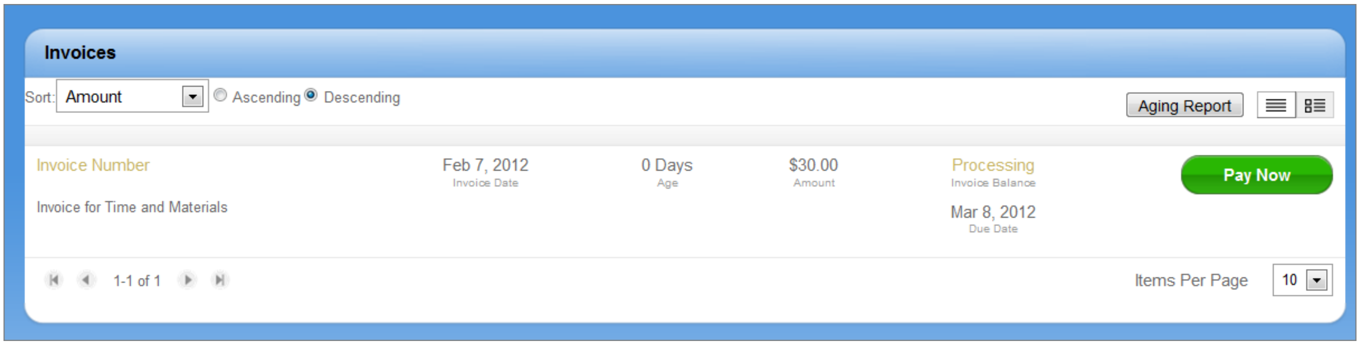
Account

In the Account View, you can view Agreements, Invoices, and update Contact information for your company.

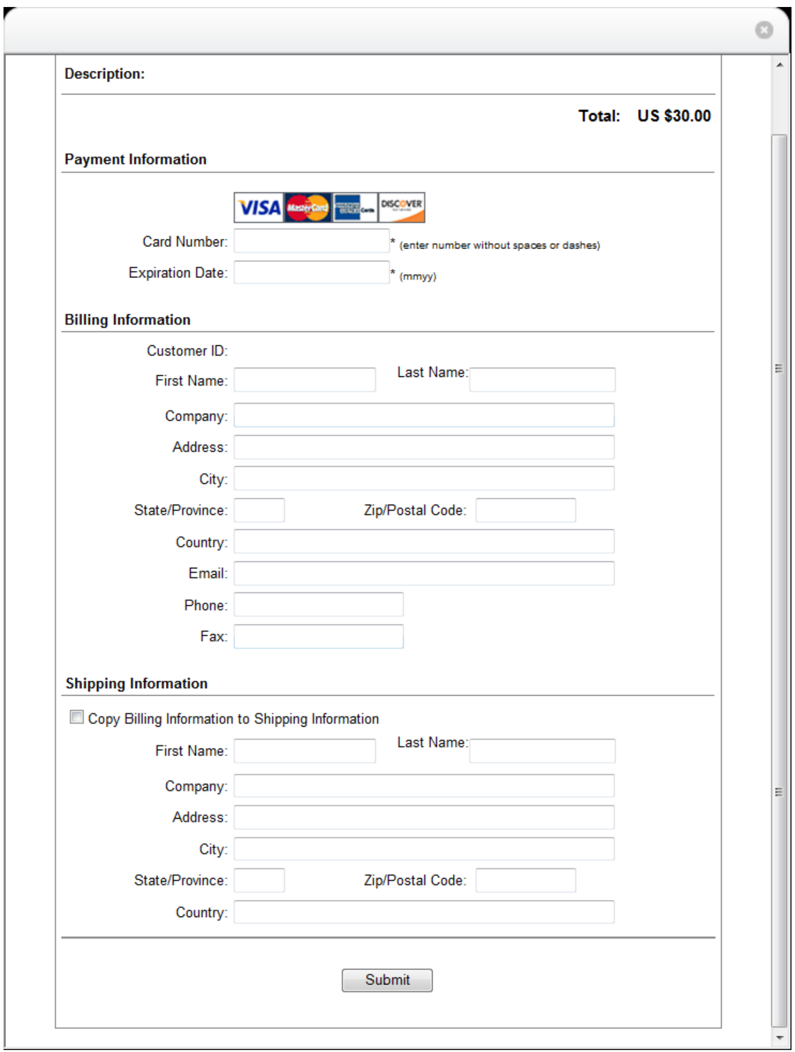
Invoices Screen

The Invoices tab displays invoices that are available. Selecting the invoice number link will open the invoice for you to review.

You may have the option to pay your invoices by selecting the **Pay Now** button.



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



Users Screen

This view enables you to update company email addresses, phone numbers, and emails, in addition to changing your password.

If you have the security rights, a list view of all of the Contacts for your Company will be available. You can click into any contact information to update it. In addition, you can click the **Add New User** button to add a new user to the portal.

Agreements Screen

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