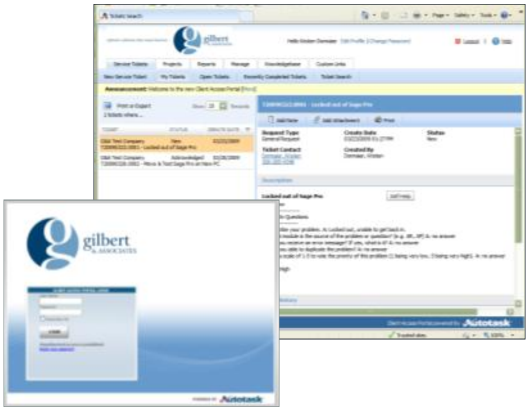
USING AUTOTASK CLIENT PORTAL

Submitting a Ticket:

Click the Service Tickets tab, then select **New Service Ticket**. This opens the Service Request Ticket page. Fill out the fields with as much detail as possible. Please remember to prioritize your tickets in a consistent and fitting manner:

- **Critical:** Think life or death situation, you are basically unable to operate.
- **High:** Urgent, Typical response time is 48 hours.
- **Medium:** Typical response time is one week.
- **Low:** This is an issue that requires discussion, not time sensitive.



Checking Ticket Status:

There are four ways to find open tickets, click on the Service Ticket tab:

- **My Tickets:** open tickets you created or that you are a contact for.
- **Open Tickets:** (not available for Basic Users) open tickets for your company.
- **Recently Completed Tickets:** all tickets completed within 7 days.
- **Ticket Search:** find a specific ticket by keyword or ticket number.

Open and view ticket details by single or double clicking a ticket.

Adding Additional Users:

On the Manage tab, select **Users** to open the Manage Users page. Click **New Contact** and enter the general information for the new contact. Click the Client Portal tab to enable Client Access for the user. Select the **Activate Client Portal** checkbox. Enter necessary information, and click **Save and Close**.

Security Levels:

- **Billing:** Allows user to submit/view tickets for which they are a contact. Allows access to past invoices.
- **Basic:** Allows user to view/update only tickets this user created or is a contact for. Allows project view/update permission for projects this user is a team member of. Allows Knowledgebase access (when Knowledgebase is turned on for the account).
- **Advanced:** Allows same view/update permissions as basic, but for ALL tickets and projects for the account.
- **Manager:** Advanced permissions for all tickets and projects for the account, including the ability to view project expenses and estimated hours, access the Invoice and Block Hours reports, and the ability to create user logins. Use this Security Level for the client user(s) that will create user logins for other users within their organization.

Viewing Past Invoices:

Click the Reports tab, select **Invoices** from the drop down list. Select criteria for the report to filter which invoices appear and click **Search**. Click to open any invoice.

LOGIN DETAILS

URL: https://www.autotask.net/ClientPortal/Login.aspx?ci=4979

My Username: ______________________________

My Password: ______________________________

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