Visualutions
Tomorrow's Vision - Today's Solution

BMS Customer Service Desk Portal Instructions

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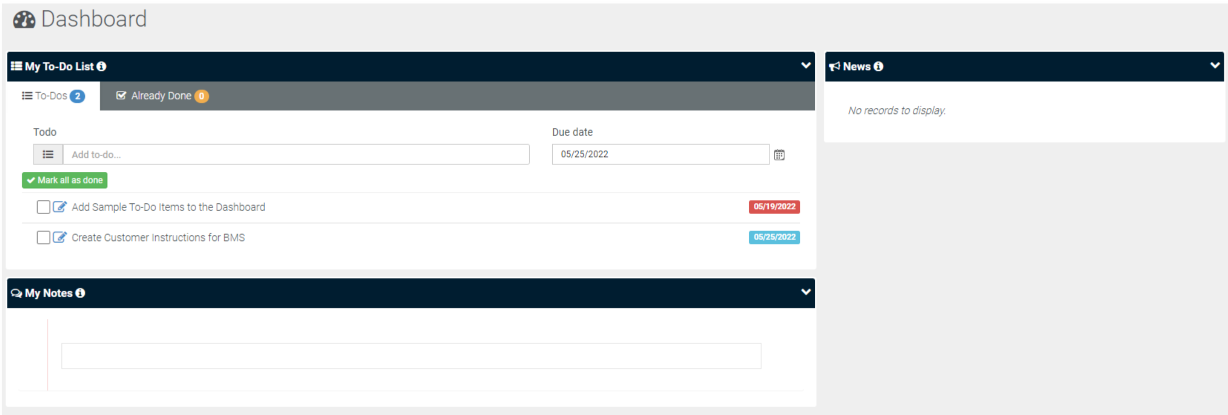
Client Portal Dashboard

The **Client Portal Dashboard** helps customers manage their activities in the system.

Dashlets include:



- **My To-Do List** - A place to set reminders.
- **My Notes** - A quick summary of thoughts or ideas you don't want to forget.
- **News** - Company news.

My To-Do List

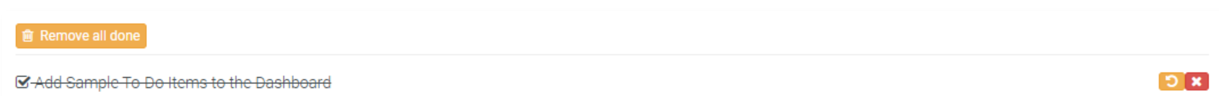
Creating a To-Do Item

In the Add to-do text box, enter text, click the calendar to set the date, and Press Enter.

Removing and Restoring a To-Do List Item

A user can click on the Check Box next to the To-Do item. The To-Do item will then be moved into the Already Done Section.

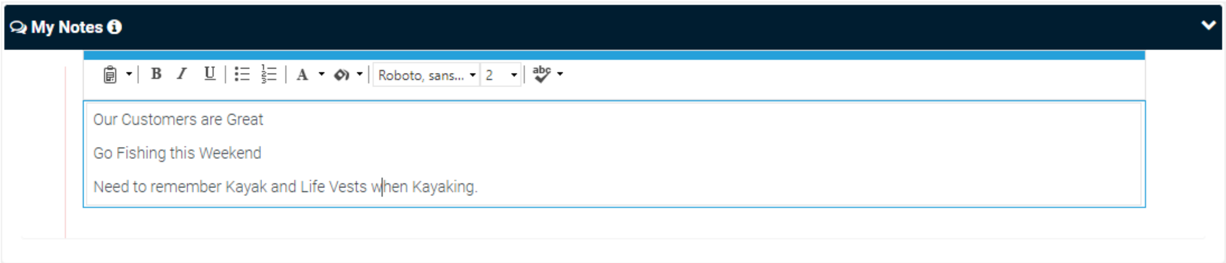
The user can remove items in the **My To-Do List** by clicking the red X in the **Already Done** tab. The user can reset the **My To-Do List** by clicking the yellow arrow if an item was completed by mistake.



My Notes

Creating Notes

Notes are entered as one long word processor, so to enter notes, just type text in the Text box.



Deleting Notes

The user can erase **My Notes** *by highlighting the words* and selecting delete on the keyboard.

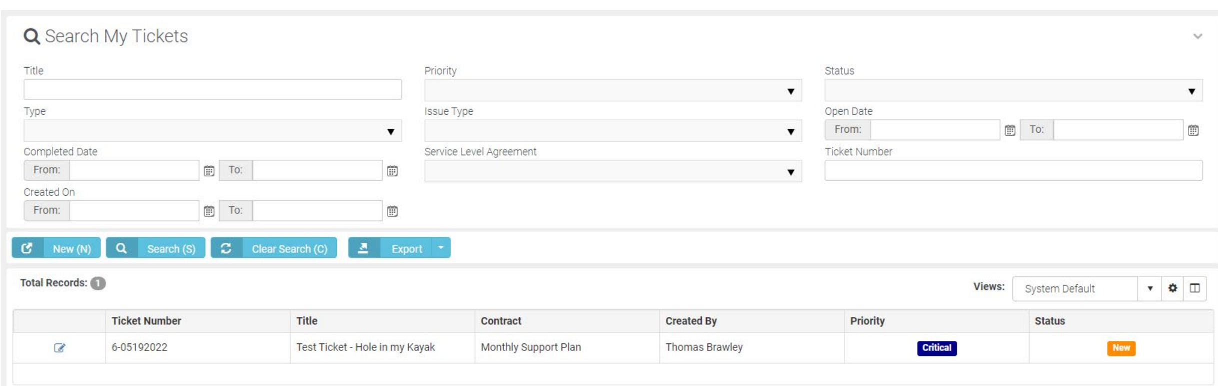
Tickets

The **Tickets** page manages all tickets in your customer organization, regardless of the customer contact person assigned to the ticket.

NOTE: You must be assigned certain rights to see all tickets within your organization.

My Tickets

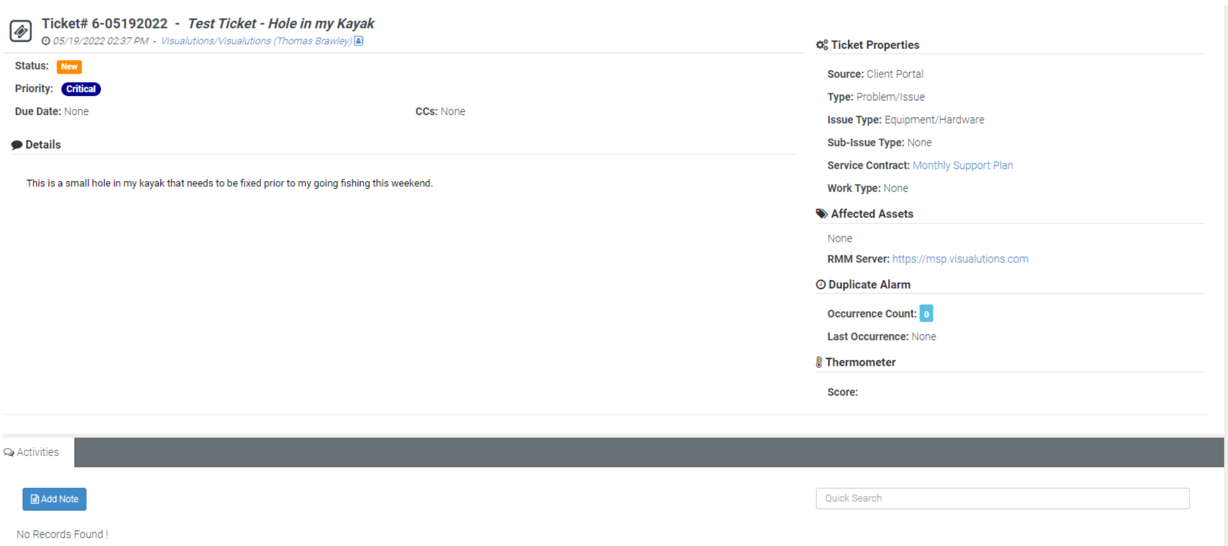
The **My Tickets** page manages tickets assigned to you as the **Contact Person** of your customer organization. If you create a new ticket using this page, the ticket is assigned to you as the customer **Contact Person** by default.



View an Existing Ticket

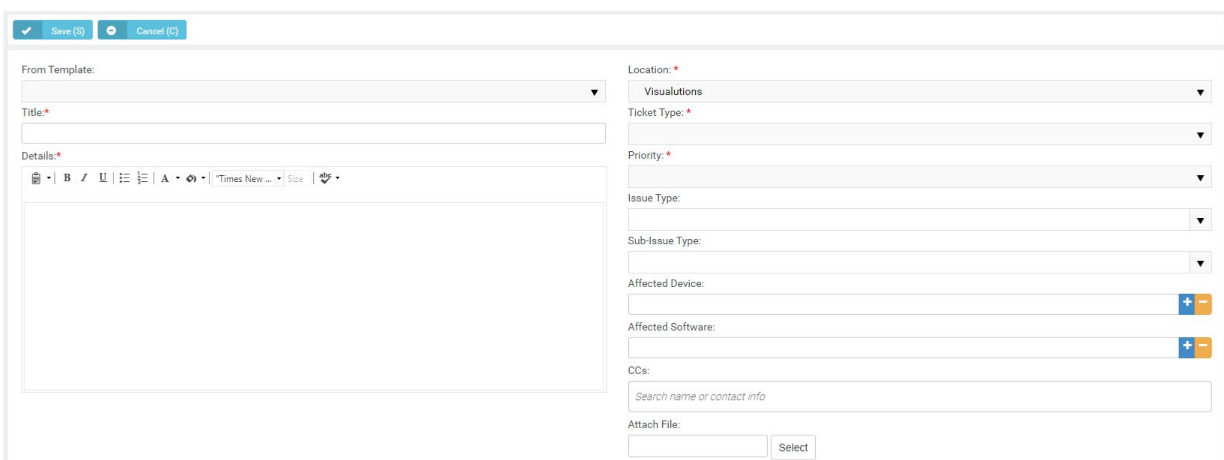
When you open an existing ticket:

- The **Ticket View** displays the general properties of the ticket.
- You can also click **Add Note** to add a note for support to read.
- You may also see notes about this ticket for you, as the customer contact, to review and possibly act on.
- To view a Ticket, click the Edit button next to the ticket. 



Create a New Ticket

1. Click **New Ticket**.
2. Enter the following in the **Quick Add Ticket** page.
3. Items with a red asterisk are required.

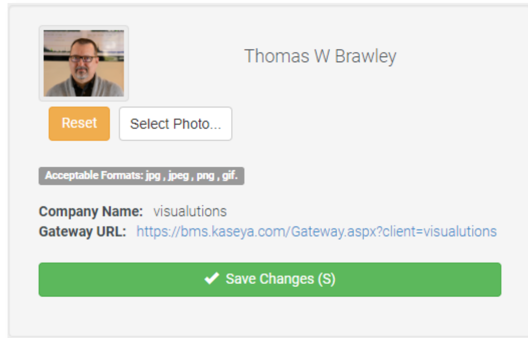


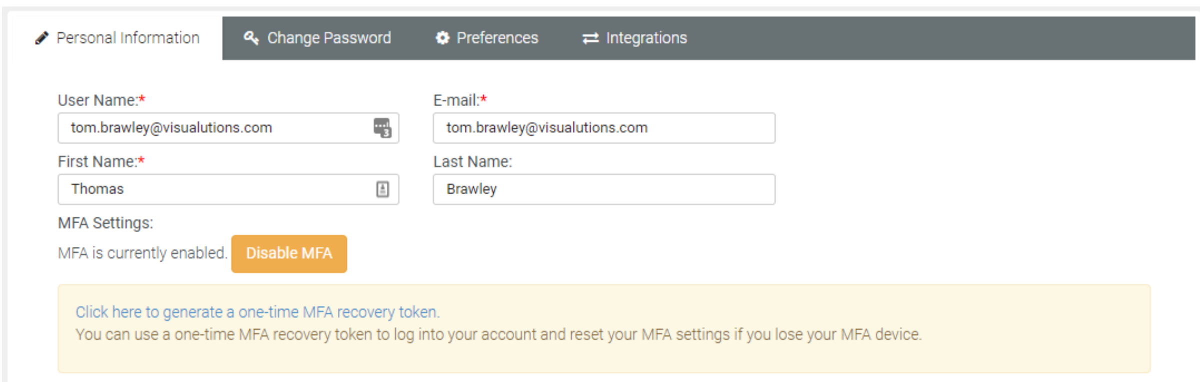
My Profile

The **My Profile** section enables you to personalize your PSA client portal experience.

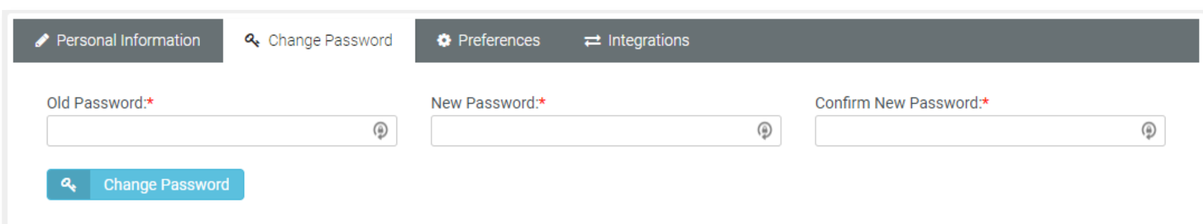
Reviewing My Profile

1. Select the Settings > **My Profile** page.
2. Review the **Personal Information** tab.
    - **Reset (Photo)**
    - **Select Photo** - jpg, jpeg, png, gif
    - **User Name**
    - **E-mail**
    - **First Name**
    - **Last Name**

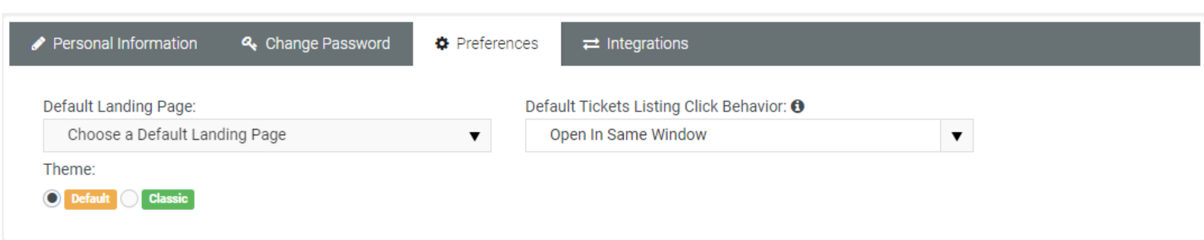




3. Optionally change your password using the **Change Password** tab.



4. Optionally change the default landing page using the **Preferences** tab.



My Messages

Customer contacts can use the **My Messages** page to send and receive messages with PSA support personnel and other customer account contacts. These messages are not linked to tickets.

When you receive new messages from support personnel, you will see an envelope icon with a count of unopened tickets in the upper left-hand corner, indicating messages are waiting for you.

Actions

- **Compose Message** - Creates a new message.
- **Reply** - Replies to received message.
- **Archive/Archived** - Move selected messages to the **Archived** folder.
- **Delete** - Deletes selected messages.
- **Inbox** - Moves selected messages to the Inbox folder.
- **Starred** - This folder lists messages that have the star toggled on.
- **Save/Draft** - Saved unsent messages are stored in the **Draft** folder.