

Visualutions Customer Portal User Guide



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Getting Started:

I. Visualutions Customer Portal:

a. What is the Customer Portal?

- i. The Visualutions customer portal is a website designed to streamline support issues between Visualutions and Visualutions' customers.
- ii. Users can log in to the customer portal securely, and quickly complete any of the following tasks:
 - Create new support tickets.
 - View all existing support tickets for your company or companies.
 - Manage your preferences for the notifications you receive when support tickets are modified.
- iii. The customer portal can be accessed by going to <https://www.visualutions.com/>, and then clicking on "Support" (See Fig. 1.)



Figure 1

II. Your User Account:

a. User Accounts:

- i. User accounts on the Visualutions customer portal work on a per-user basis. This means that users from the same company will have separate accounts.
- ii. There are two ways to request a new user account:
 - From the “Support” page, click on “Request a new account here” (See Fig. 2.)
 - Access the “Request New User Account” page directly by clicking the following link: <https://www.visualutions.com/RequestNewAccount.aspx>.

Home / Log in to the Visualutions Support Portal

Log in to the Visualutions Support Portal

Log In:

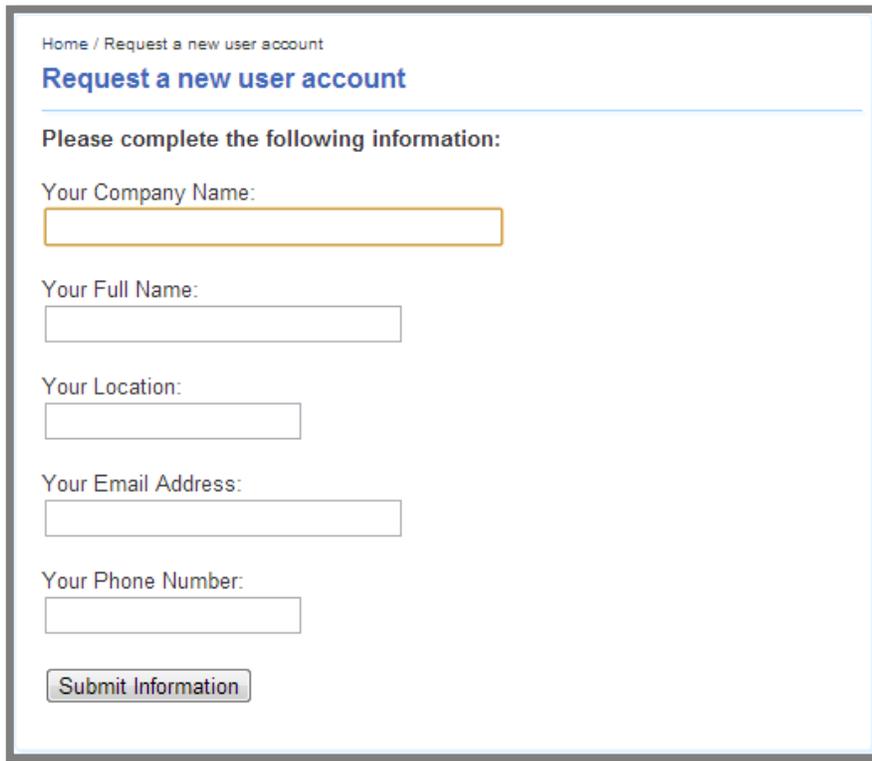
Your Email Address:
 Need a new account set up? [Request a new account here.](#)

Your password:
 Need your password? [Reset your password here.](#)

 [Customer Portal User's Guide](#)

Figure 2

- Fill out the information on the “Request a new user account” page and click “Submit Information” (See Fig. 2.1.)

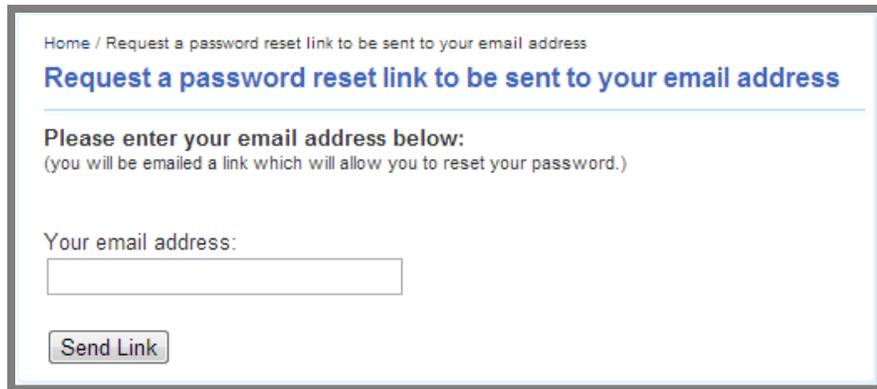


The screenshot shows a web form titled "Request a new user account". At the top left, there is a breadcrumb trail: "Home / Request a new user account". Below the title, a blue horizontal line separates the header from the main content. The main content begins with the instruction "Please complete the following information:". This is followed by five input fields, each with a label above it: "Your Company Name:" (with a yellow border), "Your Full Name:", "Your Location:", "Your Email Address:", and "Your Phone Number:". At the bottom of the form is a button labeled "Submit Information".

Figure 2.1

- iii. There are two ways to reset your password:
 - From the “Support” page, click on “Reset your password here” (See Fig. 2.)
 - Access the “Request a password reset link to be sent to your email address” page directly by clicking the following link: <https://www.visualutions.com/SendLink.aspx>.

- iv. Enter your email address and then click “Send Link” to have a link sent to your email that will allow you to reset your password (See Fig. 2.2.)
- **Note:** This will only reset the password for your email address, not the passwords for the other users from the same company.



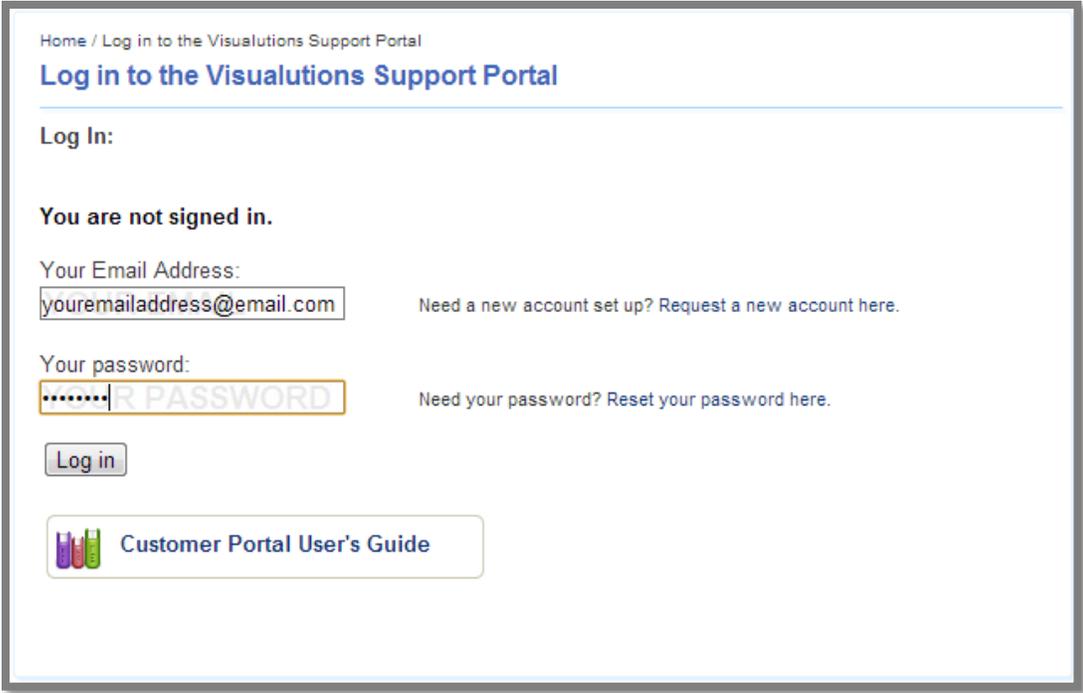
The screenshot shows a web form for requesting a password reset link. At the top, there is a breadcrumb trail: "Home / Request a password reset link to be sent to your email address". Below this is the main heading "Request a password reset link to be sent to your email address" in blue. A sub-heading reads "Please enter your email address below:" followed by a note in parentheses: "(you will be emailed a link which will allow you to reset your password.)". There is a text input field labeled "Your email address:" and a "Send Link" button below it.

Figure 2.2

III. Logging In:

a. Customer Portal Log In:

- i. To log in to the Visualutions customer portal go to <https://www.visualutions.com/>, and then click on “Support.”
- ii. This will take you to the log in screen (See Fig. 3.)
 - Enter your email address.
 - Enter your password.
 - Click “Log In.”



Home / Log in to the Visualutions Support Portal

Log in to the Visualutions Support Portal

Log In:

You are not signed in.

Your Email Address:
 [Need a new account set up? Request a new account here.](#)

Your password:
 [Need your password? Reset your password here.](#)

 [Customer Portal User's Guide](#)

Figure 3

- iii. Once you are logged in, you will be taken to the “Visualutions Customer Support Main Menu.”

IV. Customer Portal Main Menu:

- a. Visualutions Customer Support Main Menu:
 - i. The customer support main menu will be the starting point for the tasks you perform in the Visualutions customer portal.
 - ii. It is only viewable when you are logged in (See Fig. 4.)

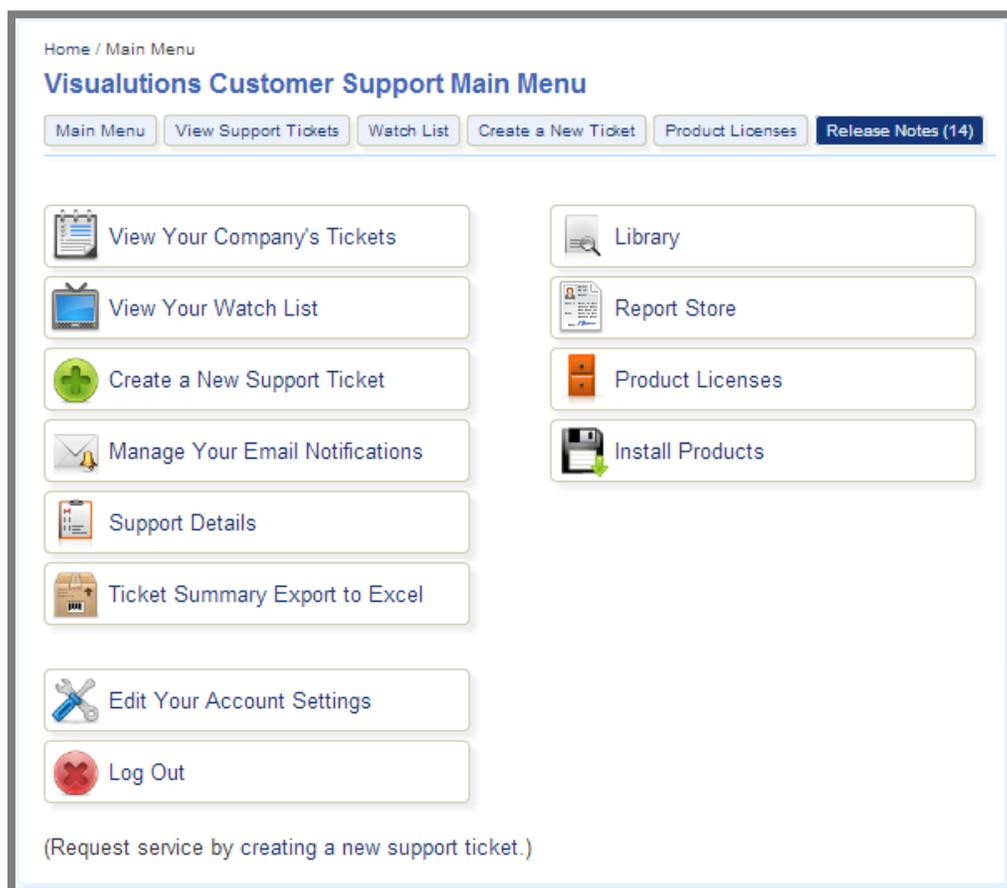


Figure 4

iii. From the main menu, you are able to:

- View Your Company's Tickets
- View Your Watch List
- Create a New Support Ticket
- Manage Your Email Notifications
- Access Support Details
- Ticket Summary Export to Excel
- Access the Library
- Access the Report Store
- View your Product Licenses
- Install Products
- Edit Account Settings
- Log Out

Note: You can also log out at any time by clicking "Log Out" in the top, right corner of the screen (See Fig. 4.1.)

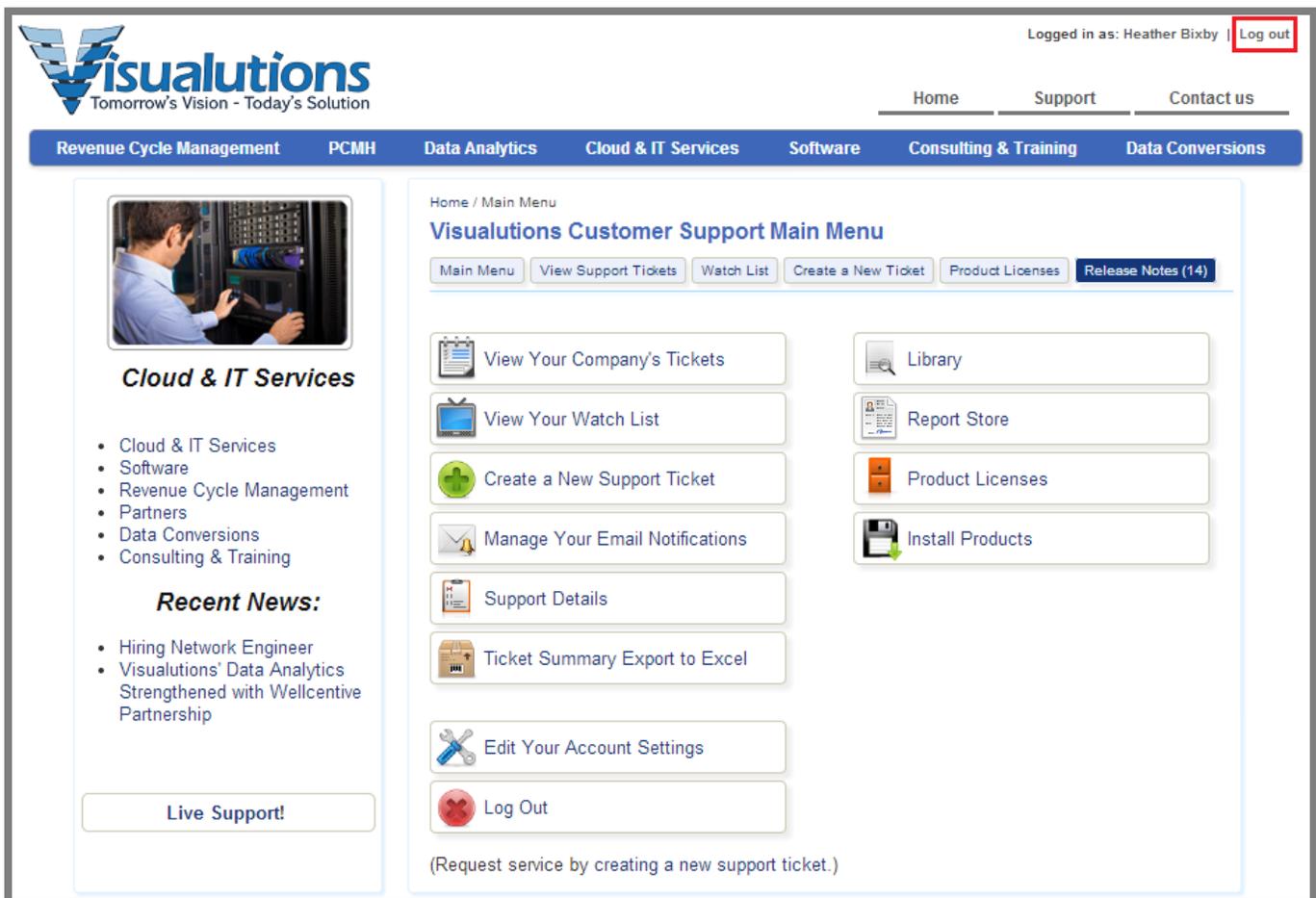


Figure 4.1

V. Quick-Launch Menu:

- a. The Quick-Launch Menu:
 - i. When you are logged in, you will see a set of navigation buttons directly below the title of each page (See Fig. 5.)
 - ii. The first button will return you to the customer support main menu. The other buttons allow you to quickly launch into other tasks.

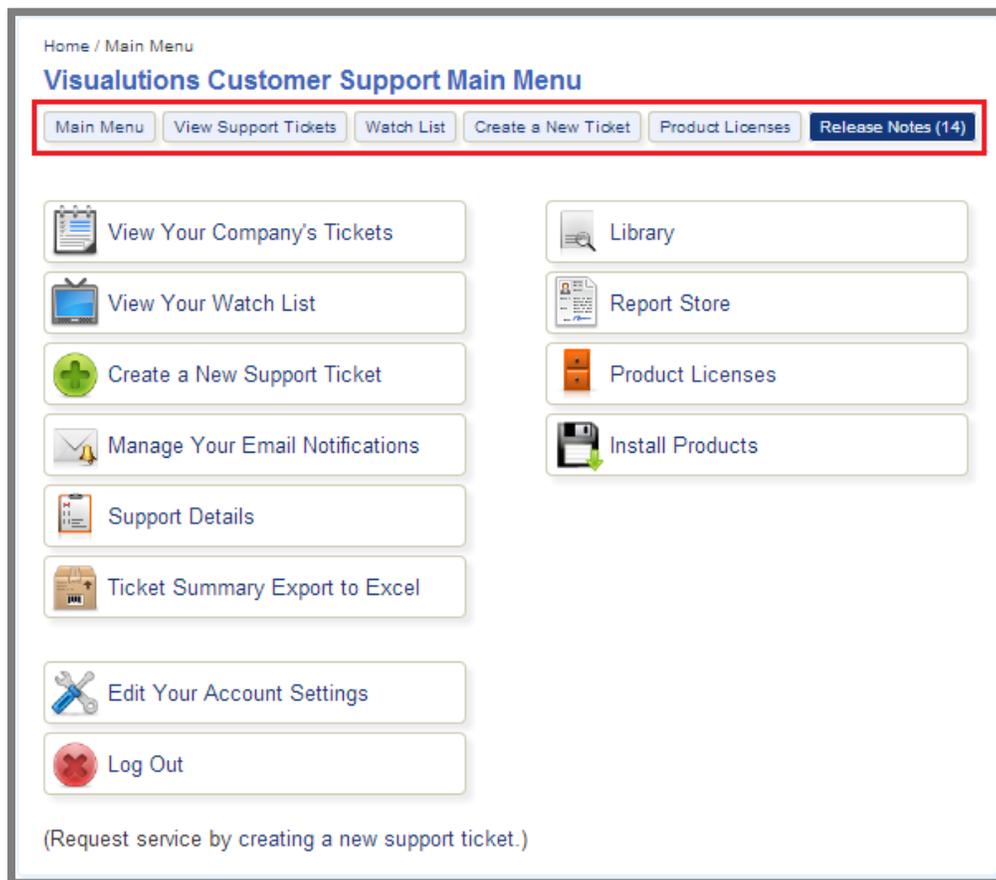


Figure 5

Using the Portal:

I. Viewing Support Tickets:

a. Viewing Your Company's Support Tickets:

- i. At any time while you are logged in to the customer portal, you can view the support tickets for the company or companies that you represent.
- ii. There are two ways that you can view support tickets (See Fig. 6.)
 - Click "View Support Tickets" in the quick-launch menu.
 - Click "View Your Company's Tickets" in the customer portal main menu.

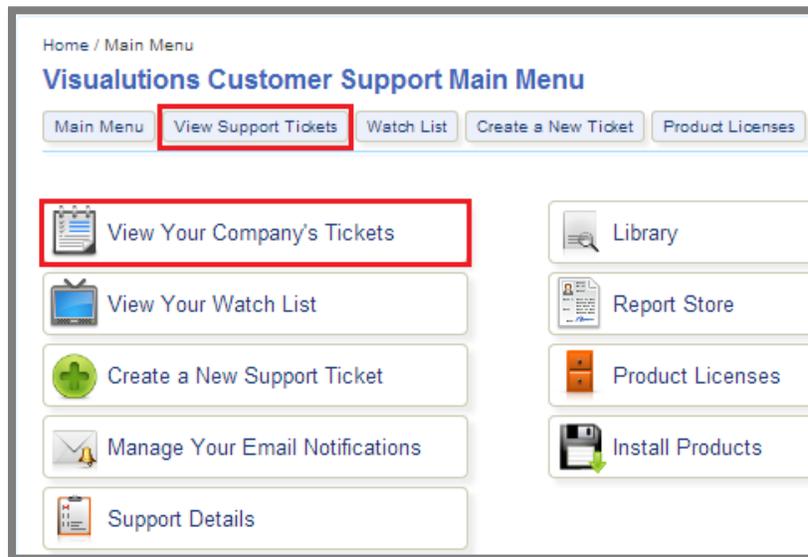


Figure 6

- iii. You will be taken to the “Open Support Tickets” page where you can view the support tickets for your company (See Fig. 6.1.)

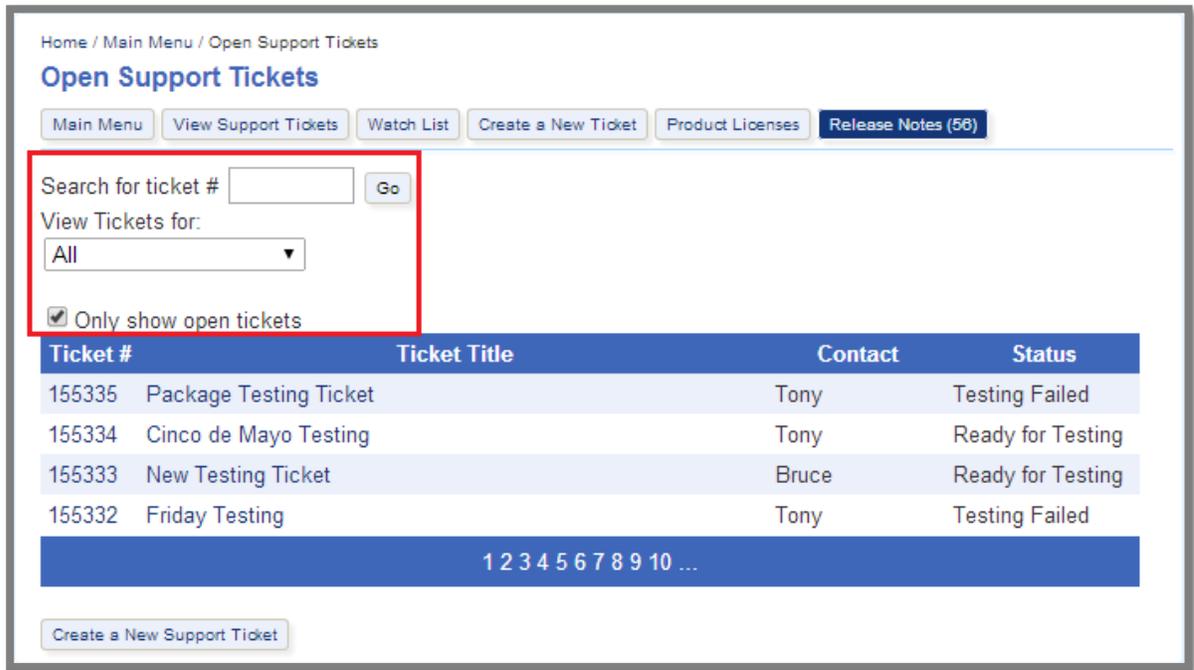


Figure 6.1

- iv. You can search for a specific ticket number by entering the ticket number and clicking “Go” (See Fig. 6.1.)
- v. You can view only the open support tickets by checking the box to the left of “Only show open tickets” (See Fig. 6.1.)
- vi. If you are a representative of more than one company, you can also select which company’s tickets you wish to view.
 - Use the “View Tickets for” drop-down list (See Fig. 6.1.)
 - Select one company to view support tickets for.
 - Or, select “All” to view the support tickets for all the companies you represent.
- vii. To view the ticket details page, click on the ticket you wish to view.

II. Support Ticket Details:

a. Ticket Details Page:

- i. The ticket details page allows you to view the latest notes on the ticket, as well as a variety of other information (See Fig. 7.)

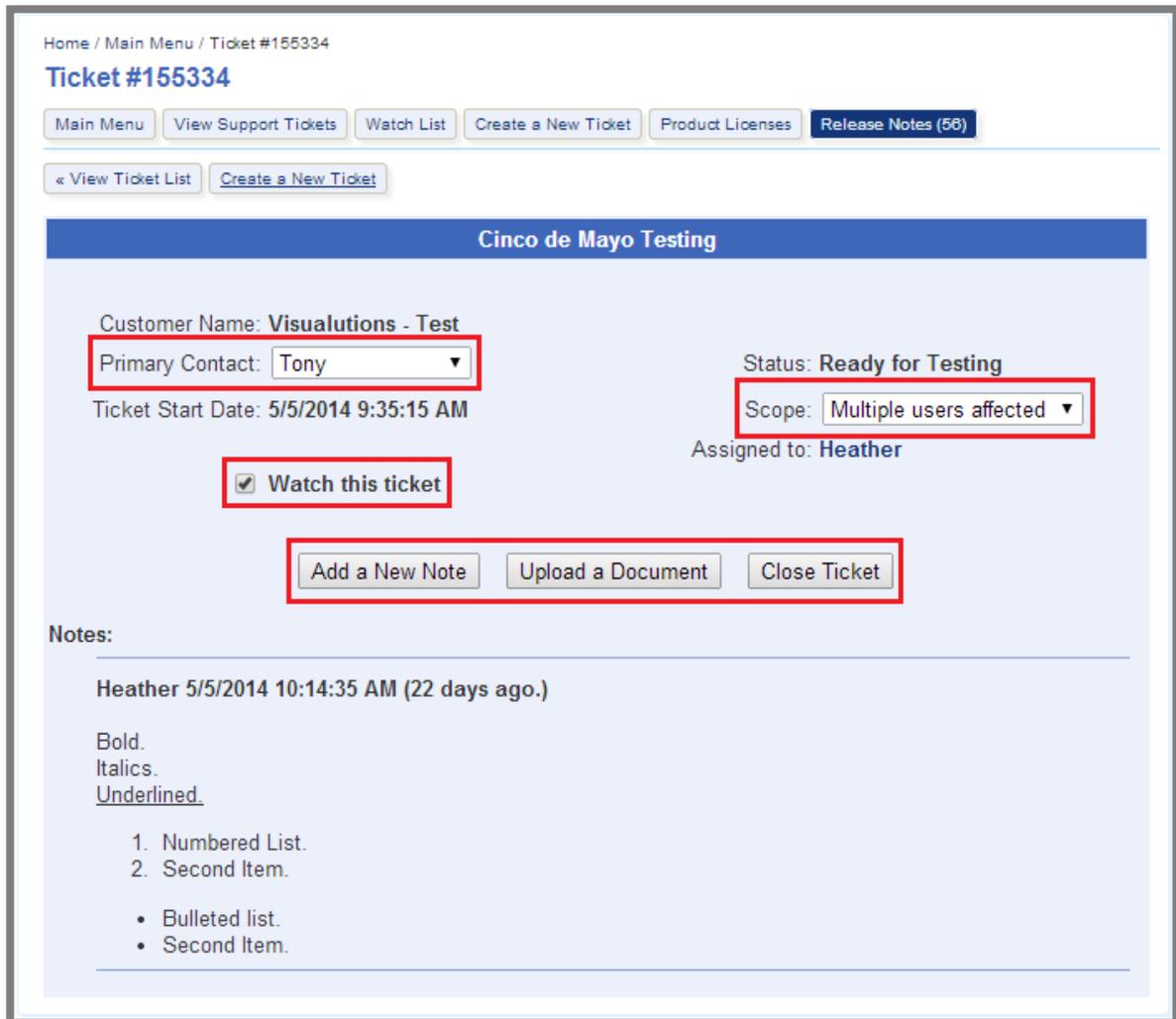


Figure 7

- ii. From the ticket details page, you can (See Fig. 7):

- Change the primary contact
- Change the scope
- Add the ticket to your watch list by checking the box to the left of "Watch this ticket."
Note: Adding a ticket to your watch list allows you to receive notifications when the ticket is updated, without having to be the primary contact or having the ticket assigned to you.
- Add a new note
- Upload a document
- Close the ticket

III. New Support Ticket:

a. Creating a Support Ticket:

- i. At any time while you are logged in to the customer portal, you can create a new support ticket.
- ii. There are two ways that you can create a new support ticket (See Fig. 8.)
 - Click “Create a New Ticket” in the quick-launch menu.
 - Click “Create a New Support Ticket” in the customer portal main menu.

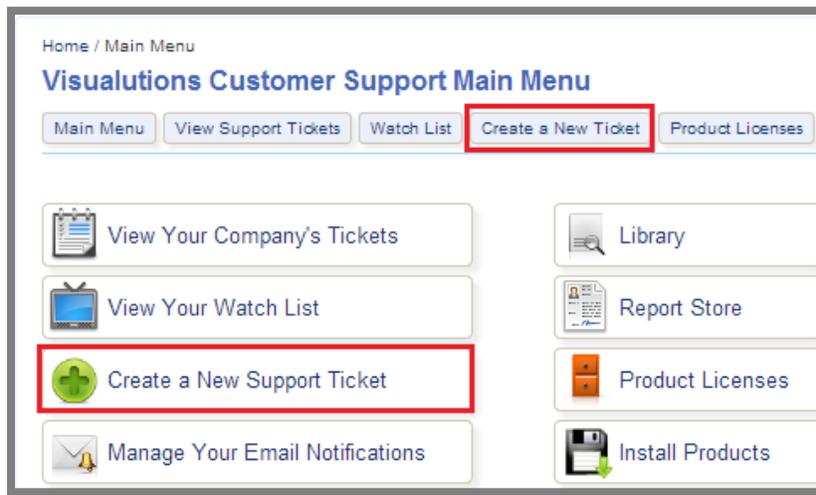


Figure 8

- iii. You will be taken to the “Create a New Support Ticket” page where you will select the company and the type of support ticket (See Fig. 8.1.)
 - **Note:** Selecting “General Support Ticket” is usually appropriate.

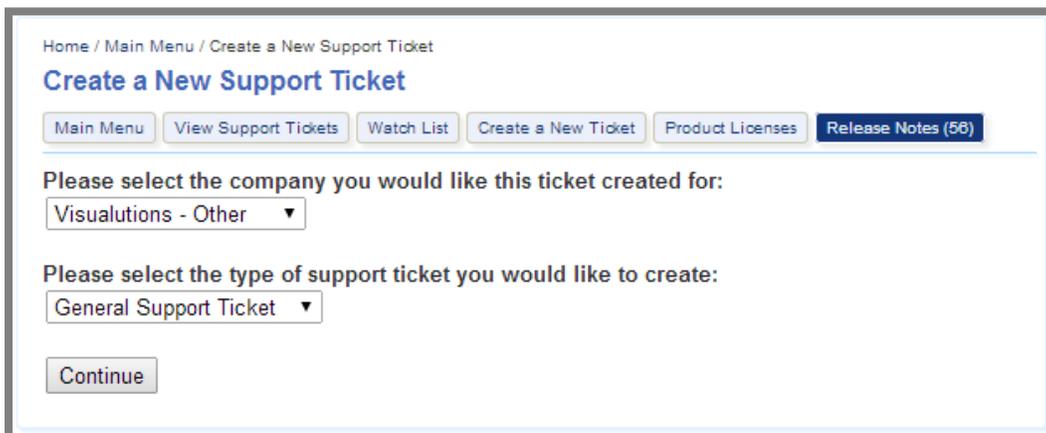


Figure 8.1

- iv. The “New Ticket” form will open, and you will fill out the following information (See Fig. 8.2):
- Primary Contact
 - Scope of Issue
 - Ticket Subject (this is the ticket title)
 - Description of Issue
Note: The more details you give regarding the issue may result in a faster resolution time.
 - Click “Save This Ticket”

The screenshot shows a web interface for creating a new support ticket. At the top, there is a breadcrumb trail: "Home / Main Menu / Create a New Support Ticket". Below this is the main heading "Create a New Support Ticket" and a navigation bar with buttons for "Main Menu", "View Support Tickets", "Watch List", "Create a New Ticket", "Product Licenses", and "Release Notes (58)". The form itself is titled "New Ticket" and contains the following fields:

- Primary Contact:** A dropdown menu.
- Scope of issue:** A dropdown menu with "One user affected" selected.
- Ticket Subject: (required)** A text input field.
- Description of Issue (required)** (Please be as detailed as possible.): A large text area for detailed description.

At the bottom of the form is a button labeled "Save This Ticket".

Figure 8.2

- v. Once the ticket has been saved, Visualutions customer service representatives will be notified of the issue.

IV. Notifications:

a. Email Notifications:

- i. The Visualutions customer portal allows you to easily manage whether or not you receive email notifications when support tickets are updated.
- ii. From the customer portal main menu, click “Manage Your Email Notifications” (See Fig. 9.)

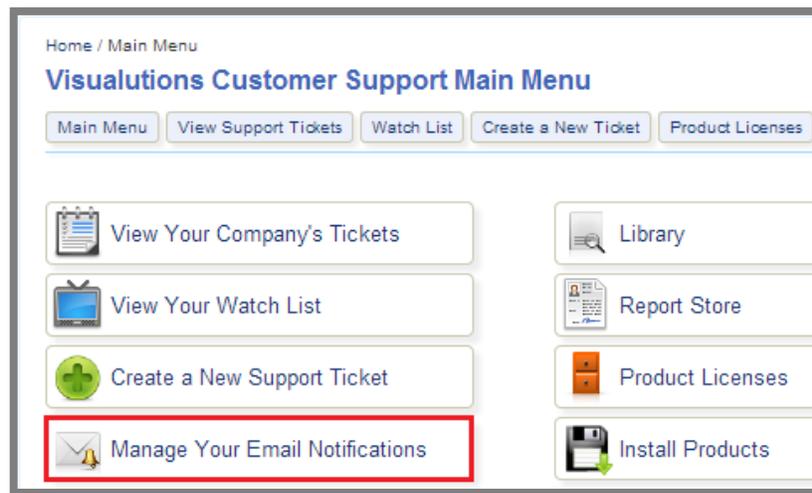


Figure 9

- iii. You will be taken to the “Manage Your Email Notifications” page (See Fig. 9.1.)

Home / Main Menu / Manage Your Email Notifications

Manage Your Email Notifications

Main Menu View Support Tickets Watch List Create a New Ticket Product Licenses Release Notes (56)

Ticket Notification Settings

Scenario	Setting
You are the contact person on the ticket.	On ▼
You are watching the ticket.	On ▼
All tickets for your company.	Off ▼

Product Update Notification Settings

Scenario	Setting
Licensed Product Updated	On ▼

Figure 9.1

- iv. From this screen, you can turn email notifications on or off for the following scenarios:

▪ **Ticket Notification Settings:**

1. You are the contact person on the ticket.

Note: This means that you created the ticket, or you are the contact person on the ticket.

2. You are watching the ticket.
3. All tickets for your company.

▪ **Product Update Notification Settings:**

1. Licensed Product Updated

Note: If this setting is turned on, you will receive an email notification any time a product you are licensed for has a new release note published.

V. Product Licenses:

a. Your Visualutions Products:

- i. The Visualutions customer portal allows you to easily view your product license information, and download your Visualutions products.
- ii. There are two ways that you can access the Product Licenses page (See Fig. 10.)
 - Click “Product Licenses” in the quick-launch menu.
 - Click “Product Licenses” in the customer portal main menu.

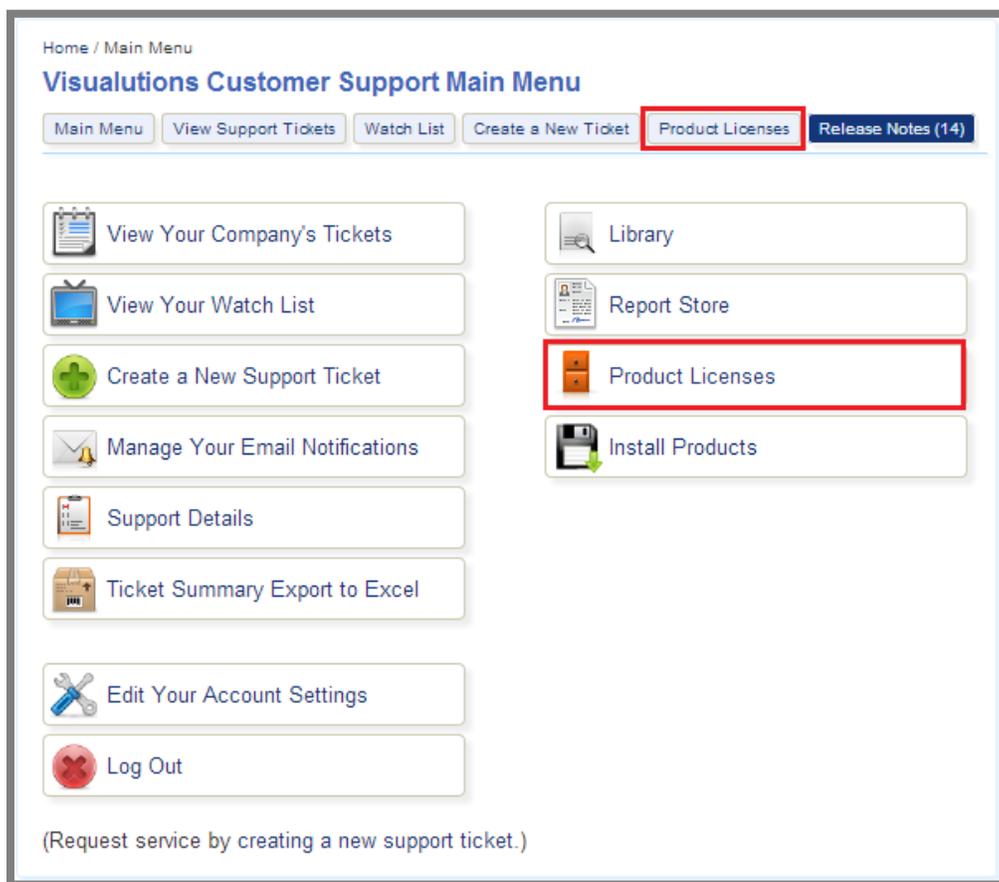


Figure 10

- iii. You will be taken to the “Product Licenses” page (See Fig. 10.1.)

Home / Main Menu / Product Licenses

Product Licenses

Main Menu View Support Tickets Watch List Create a New Ticket Product Licenses Release Notes (56)

Install Products

Click on a product description below to view product update information

Customer	Description	Key	Issue Date	Expiration
Visualutions - Other				
Expired	UDS Reporting	2-47	10/16/2012	11/8/2013
Expired	VisDental	2-47	10/16/2012	11/8/2013
Expired	VisCHC	2-47	10/16/2012	11/8/2013
	VisAnalytics Reporting	2-47	10/16/2012	
	VisWebRoot	2-47	4/3/2013	10/15/2015
	CustomReport10Pack	2-47	6/6/2013	
	VisEDI	2-47	10/24/2013	
	VisDental	2-48	11/28/2012	12/14/2014

To install or update these products, run the installer, and enter the product key from the list above.

Download the installer by clicking here.

EDI Plugins

Figure 10.1

- iv. From this page, you can do the following things (See Fig. 10.1):

- View a list of your Visualutions products.
- View the product key for your Visualutions products.
- View the issue date and expiration date for each product.

Note: If the product license is expired it will appear in bold, red text, and will say “Expired” on the left-hand side of the product list.

Note: If the product license is due to expire within the next 30 days it will appear in bold, orange text, and will say “Expiring Soon” on the left-hand side of the product list.

- Download the VisInstaller to install products by clicking the “Install Products” button in the upper right-hand corner, or the “Download the installer by clicking here” link at the bottom of the page.
- Install EDI Plugins.

- v. To view the release notes for a product, click on the product name in the “Description” column (See Fig. 10.1.)
- vi. The release notes for that product will be opened, and you can click on the release note title to read that release note (See Fig. 10.2.)

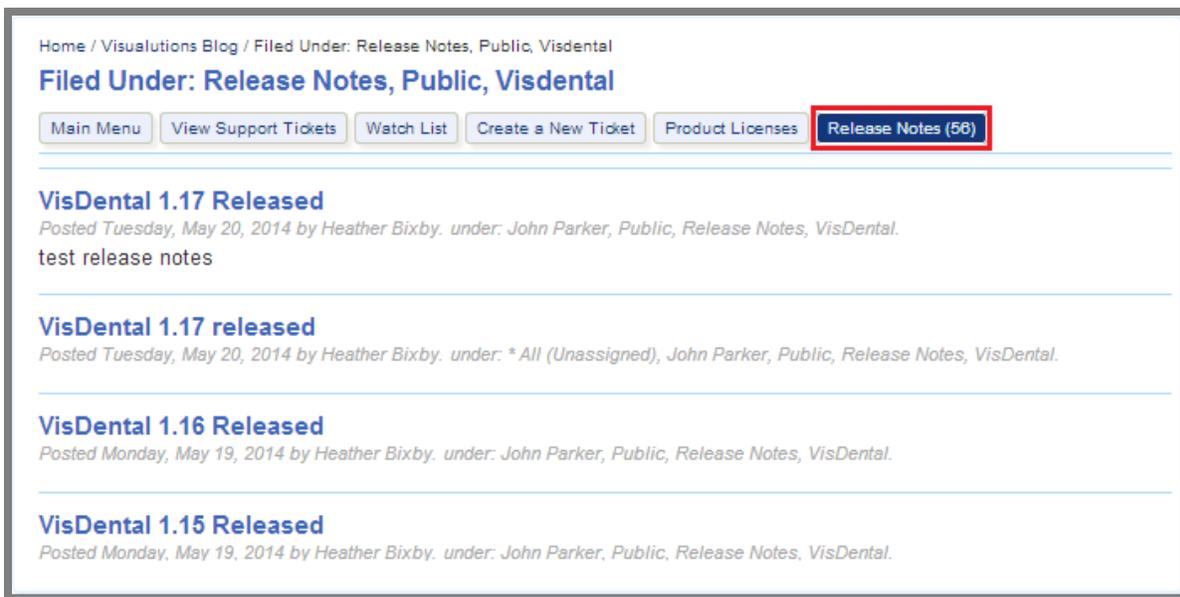


Figure 10.2

- vii. You can also view all of the unread release notes for all the products you are licensed for by clicking “Release Notes” in the quick-launch menu (See Fig. 10.2.)

VI. Install Products:

a. Download VisInstaller:

- i. To download the VisInstaller, click the “Install Products” button in the main menu (See Fig. 11.)
- ii. Save and run the installer to install your products.
 - **Note:** You can also download the VisInstaller from the “Product Licenses” page by pressing the “Install Products” button in the upper right-hand corner.

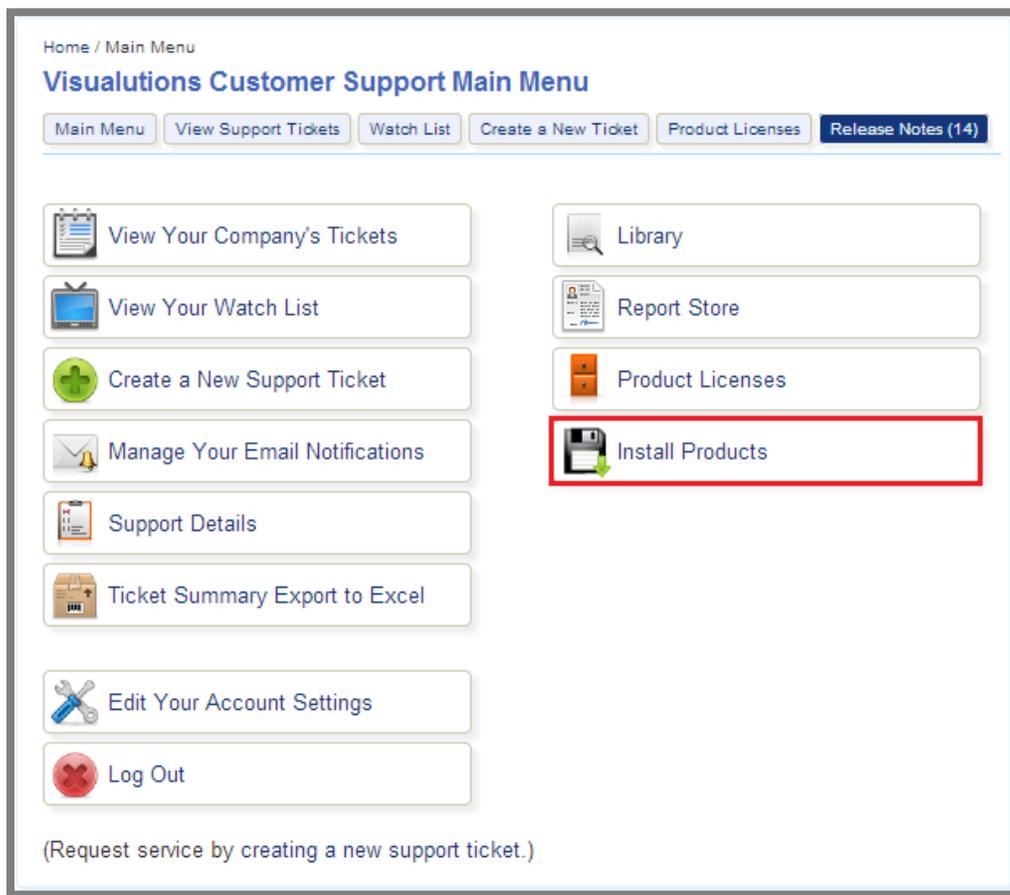


Figure 11

- **Note:** For complete instructions on the installer, download the install guide for the product you wish to install from the “Installation Guides” folder in the Library.

VII. Visualutions Library:

a. Visualutions Library:

- i. From the customer portal main menu, click “Library” (See Fig. 12.)

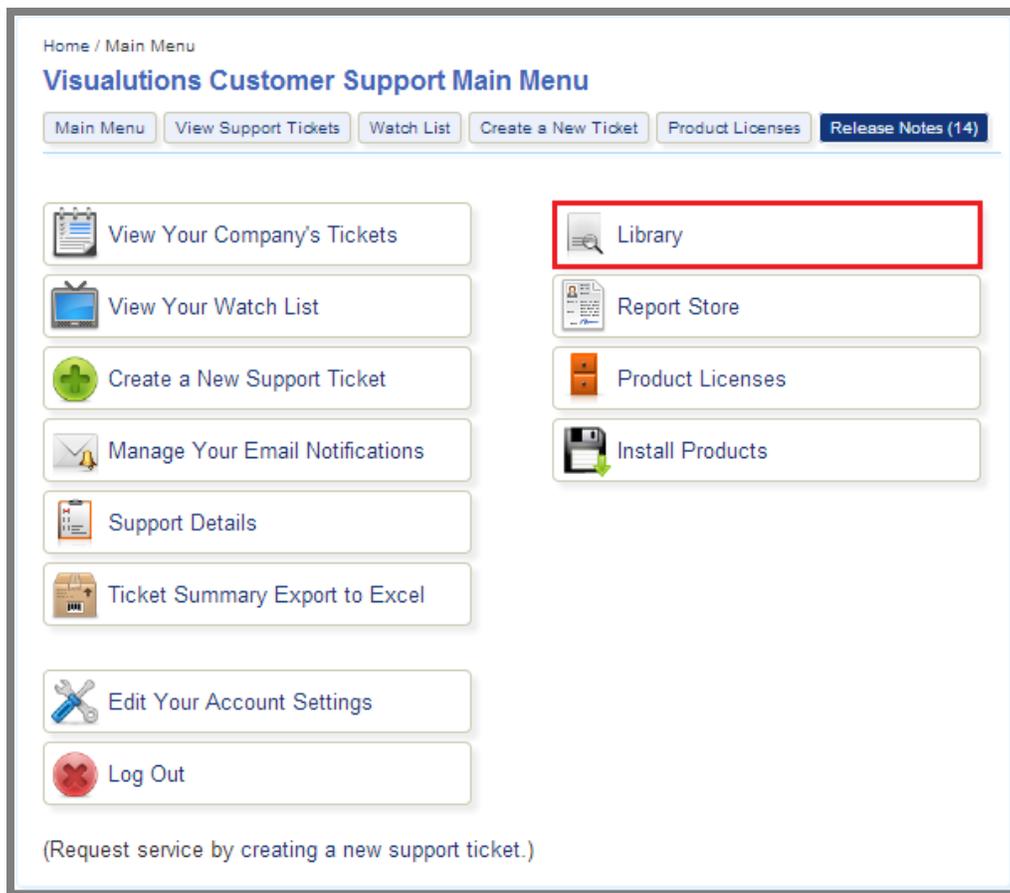


Figure 12

- ii. The Visualutions Library allows you to quickly and easily access all of the user guides and other supplemental materials pertaining to Visualutions products (See Fig. 12.1.)

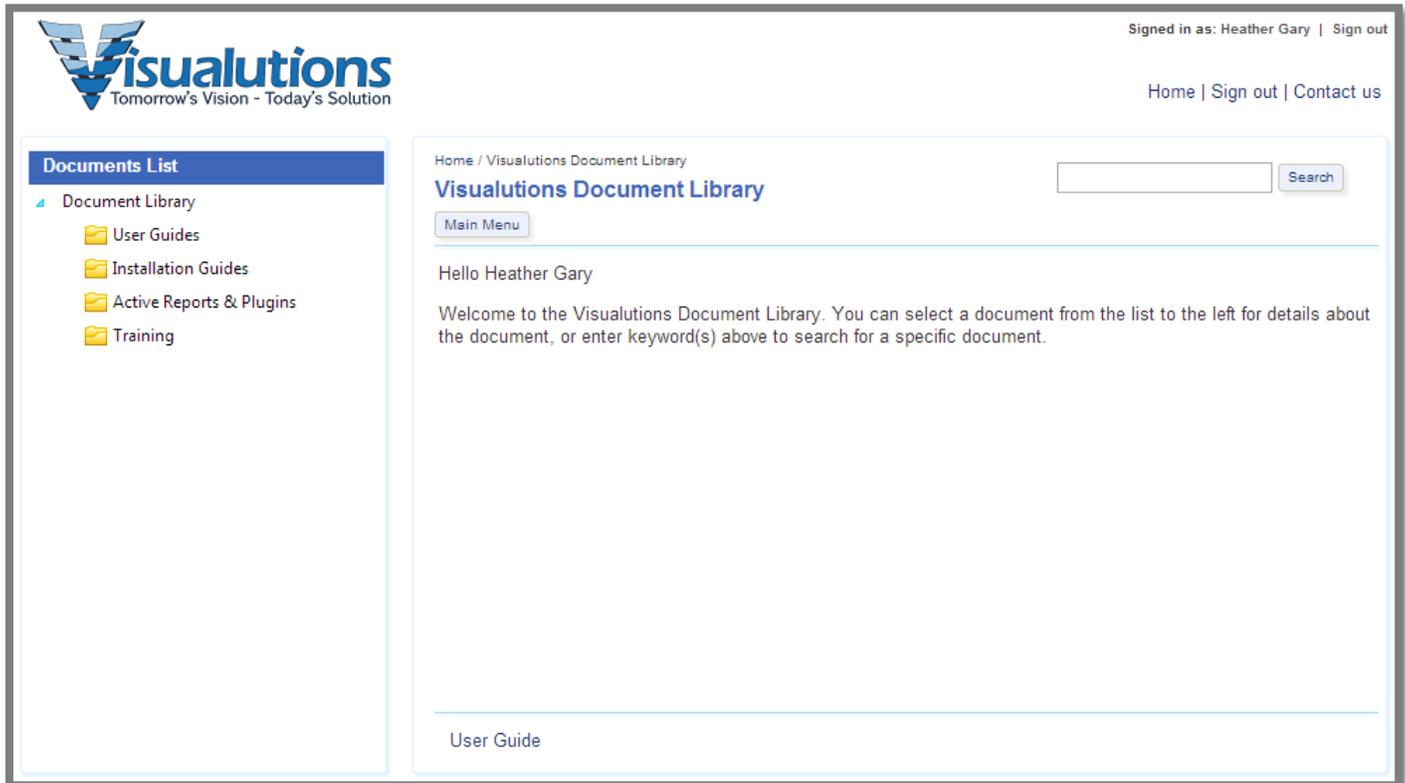


Figure 12.1

- **Note:** For complete instructions on the Library, you can view the "Library User Guide" by clicking the link at the bottom of any page in the Library.

VIII. Report Store:

a. Visualutions Report Store:

- i. From the customer portal main menu, click "Report Store" (See Fig. 13.)

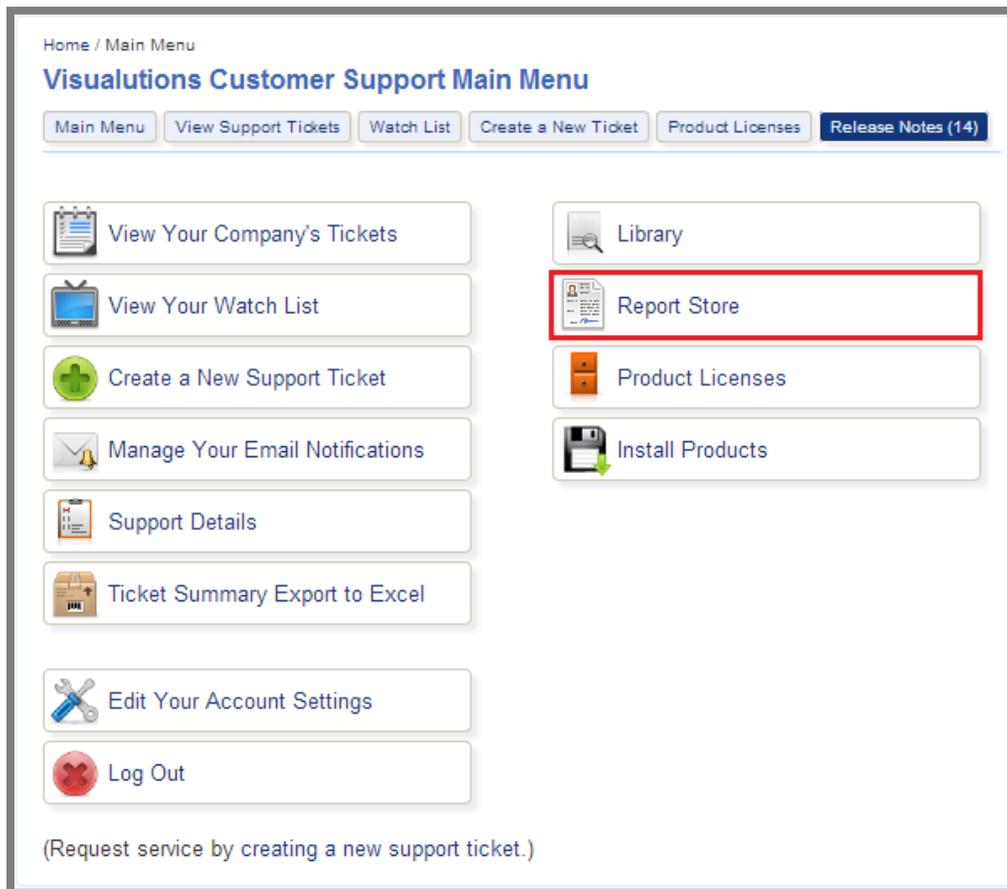


Figure 13

- ii. The Visualutions Report Store allows you to view various reports (See Fig. 13.1.)

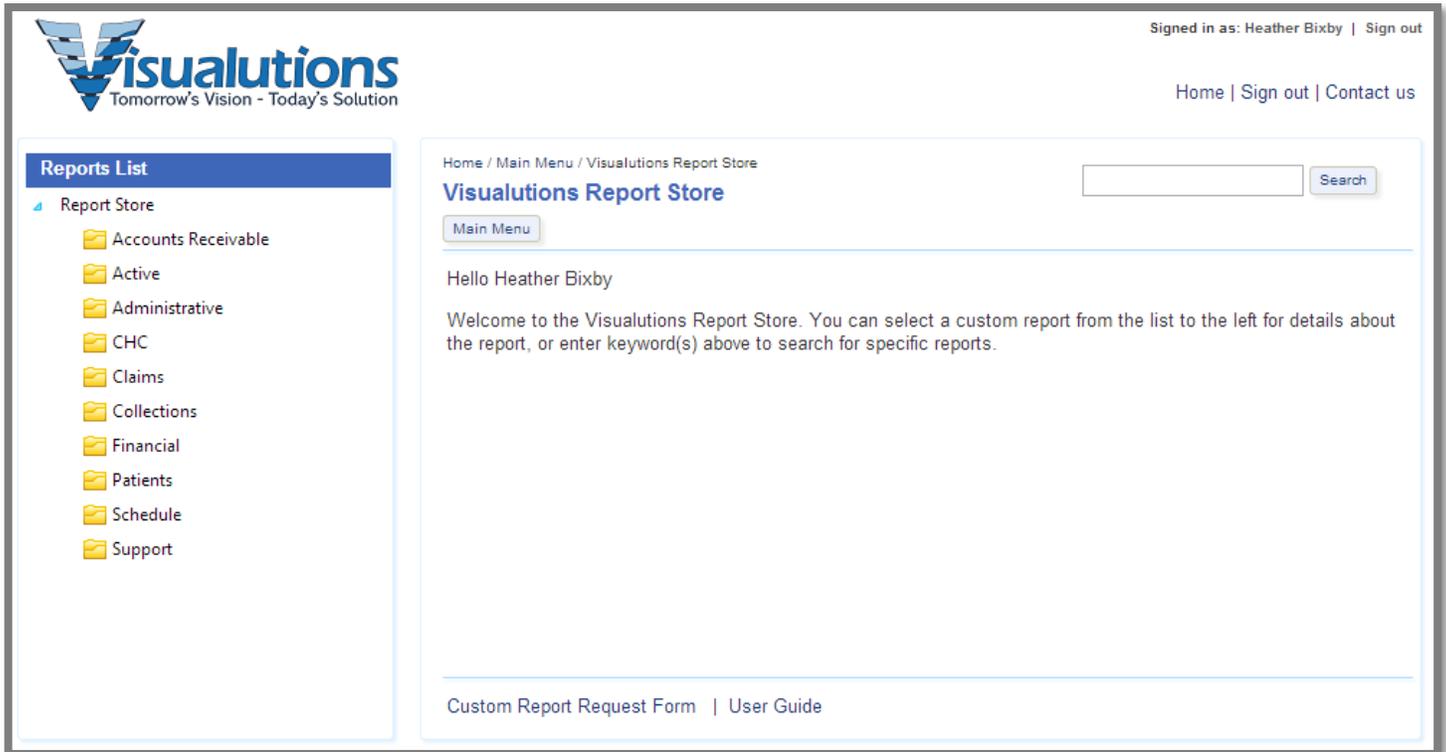


Figure 13.1

- **Note:** For complete instructions on the Report Store, you can view the "Report Store User Guide" by clicking the link at the bottom of any page in the report store.

- iii. Selecting a report will open the report details page. From this page, you can (See Fig: 13.2):
- Preview a sample of the report (if one exists)
 - Download the report

Note: You will only be able to download reports if you have purchased the report store. If you have not purchased the report store and would like to, please contact Visualutions Sales at 281-297-2257.

The screenshot displays the Visualutions Report Store interface. On the left is a 'Reports List' sidebar with a tree view under 'Report Store'. The 'Claims' folder is expanded, and 'Claim History' is selected. The main content area shows the breadcrumb 'Home / Main Menu / Visualutions Report Store', a search box, and a 'Main Menu' button. Below this, it indicates 'Selected Group: Claims' with 'Preview' and 'Download' buttons highlighted by a red box. The 'Claim History' section includes a description: 'Shows claim history by claim and carrier. Lists DOS, ticket number, patient name, procedures, filed by, claim date, and charges. Click the Show Visit Detail option for more information per claim.' It also lists creation and modification details: 'Created by: Rick Hart on 1/31/2007 8:32:39 PM' and 'Modified by: Suzanne Oney on 7/15/2013 3:45:14 PM'. At the bottom, there is a footer with 'Custom Report Request Form | User Guide'.

Figure 13.2

Visualutions Customer Service:

- I. Contacting Customer Service:
 - a. Contacting Visualutions Customer Service:
 - i. For customer service, open a ticket through the customer portal on the Visualutions website:
<https://www.visualutions.com/>
 - ii. You can also contact customer service by email or phone:
 - support@visualutions.com
 - Phone:
 - 281-297-2257