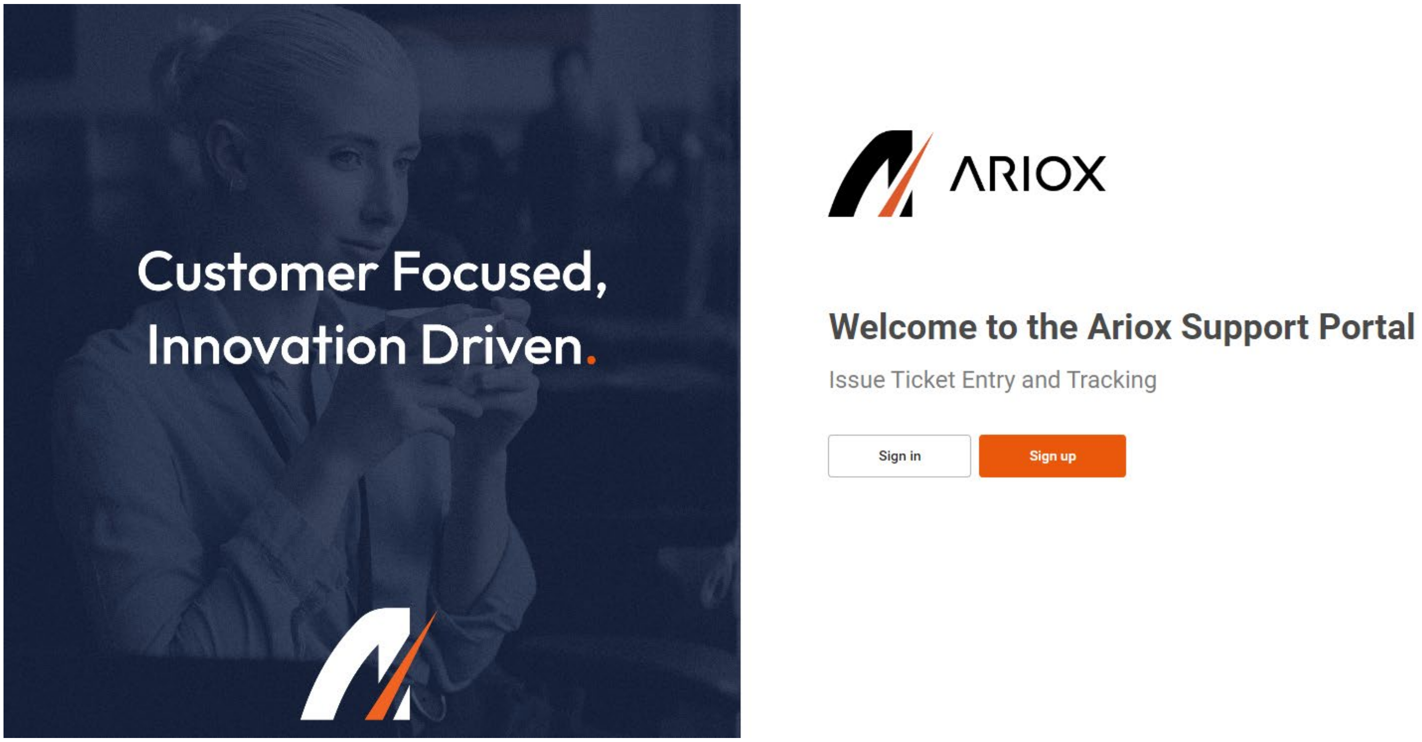
How to Use the Ariox Support Portal

Contents

Logging into the Customer Support Portal

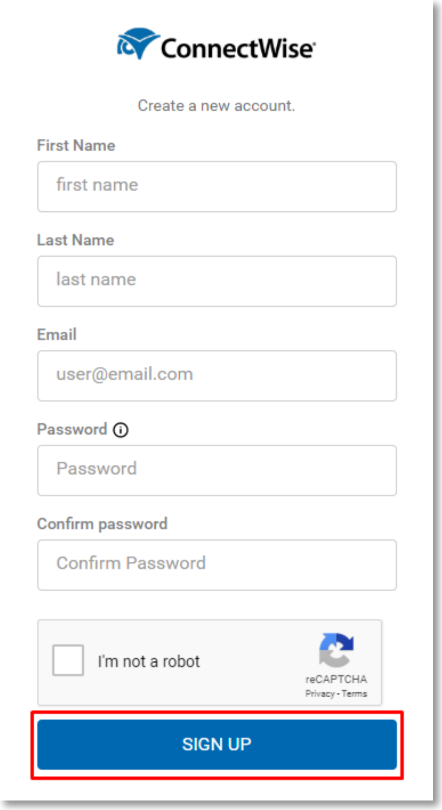
1) Navigate to ariox.myportallogin.com



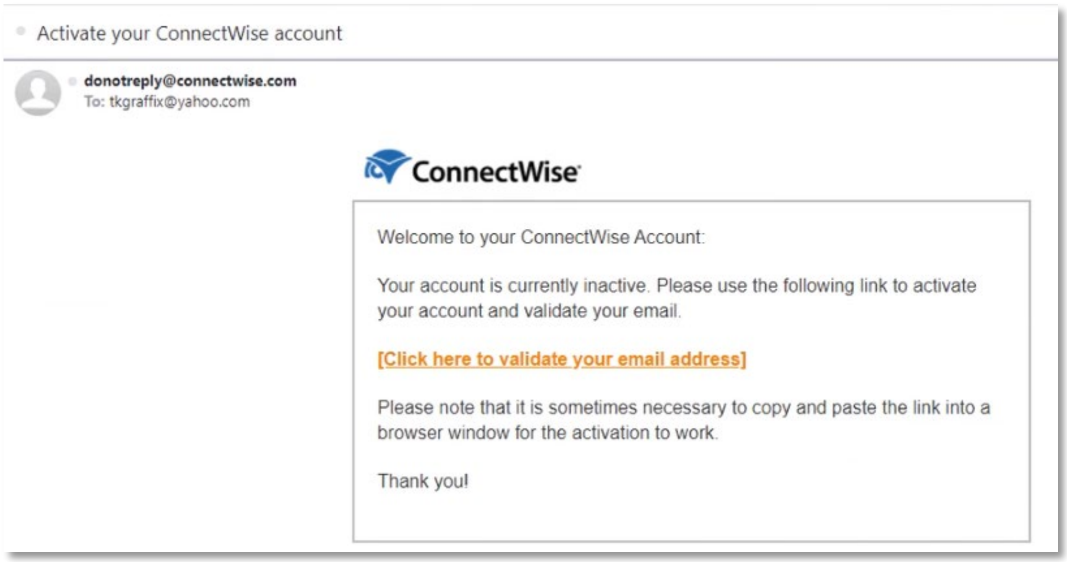
*Note: Google Chrome is the only supported web browser for the Customer Portal

2) If you have not already generated a username and password- select the "Sign up" button and submit information on name, email, and password.

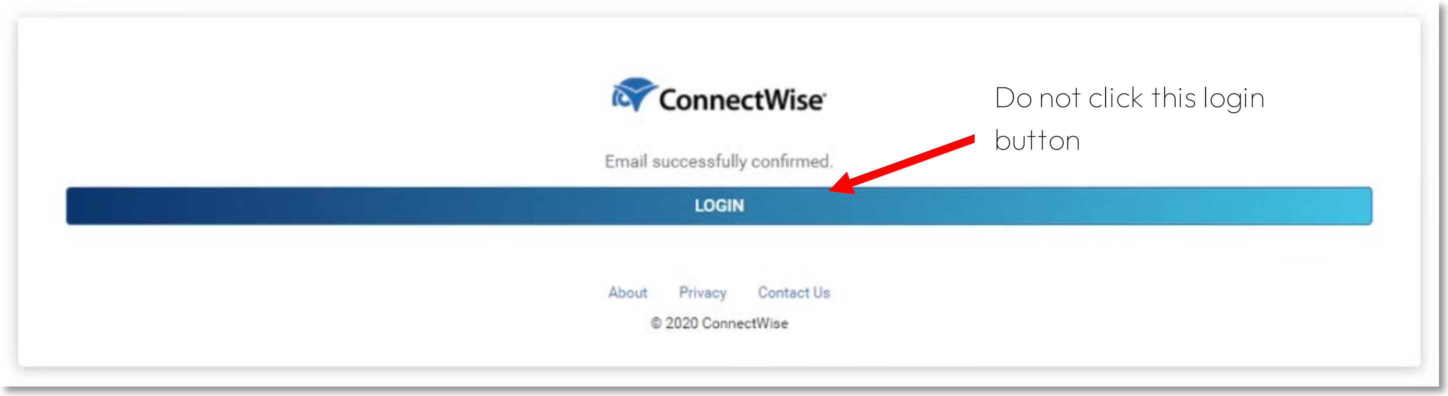
3) Create Password and click **Sign up**.



4) Once you have signed up, you will be routed back to the main sign-in screen- and will be sent an email that requires your sign-up confirmation, shown below:



5) Follow the link in the confirmation email, but do NOT click the "Login" button on the confirmation page. Exit out of the tab once you have followed the link and see the message that the confirmation was successful.



6) Next, navigate back to the original tab with the Customer Portal sign-in page and select "Sign-in" using the email and password you generated on the sign-up screen.
7) After successful sign-in, you will be directed to the Portal Home Screen.
8) From the Customer Portal Home Screen users can:

- Submit and Track Service Tickets
- View Projects and Project Tickets
- Manage/Edit User Information and Permissions

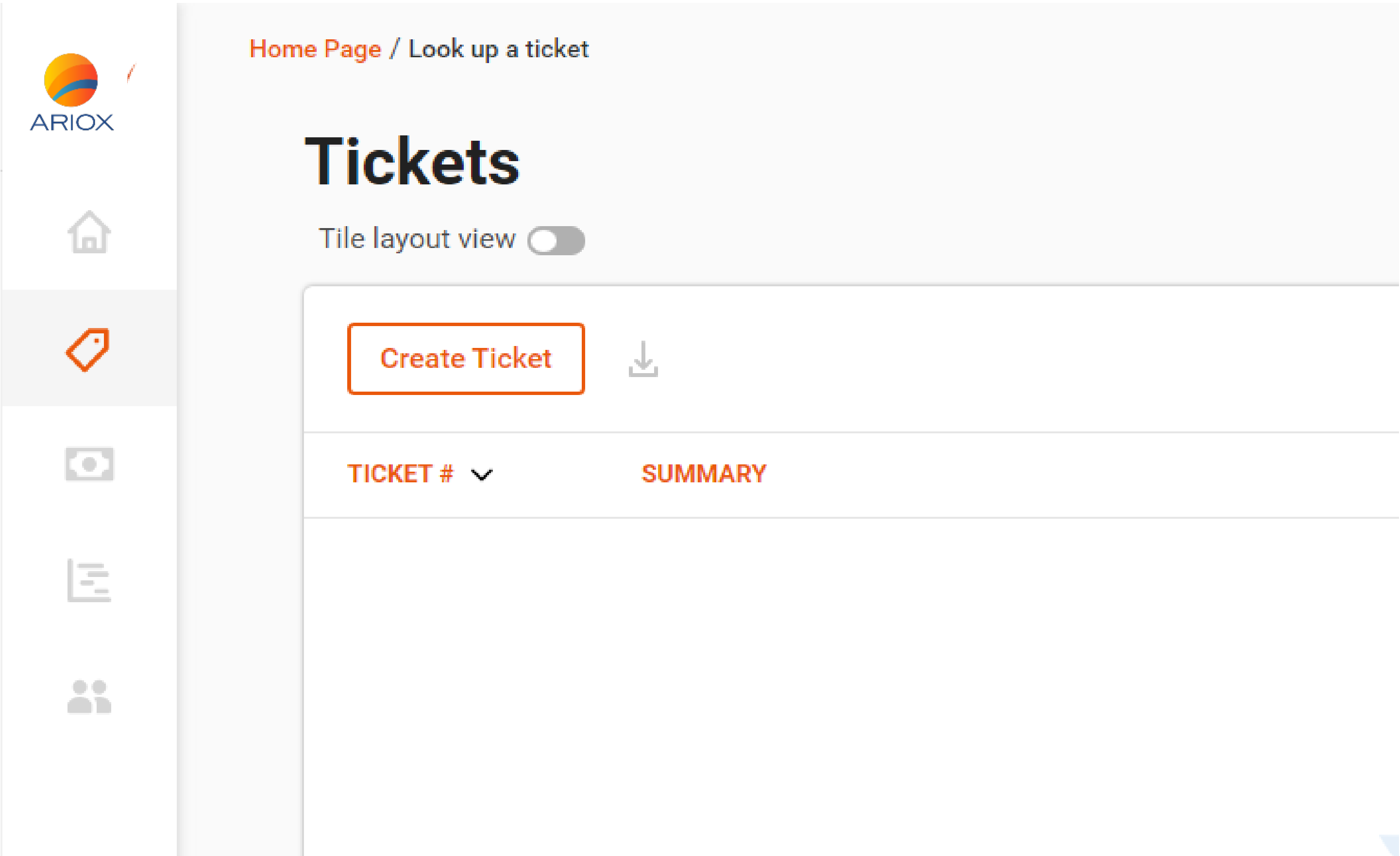
Customer Portal Tickets Screen

The Tickets screen allows customers to create and view tickets. To View the Tickets screen- click the Tickets icon from the left navigation bar- or select either the “Submit a ticket” or “Look up a ticket” icons from the home screen.

Open Tickets Tab

The Open tickets tab displays a list of all currently open tickets. Each list item provides the following information:

- Ticket number.
- Issue description.
- Date and time of submission.
- Contact on the ticket in ConnectWise Manage®. If it is changed in Manage, the updated contact is reflected here.



View Ticket Details

Click a ticket to view the following information:

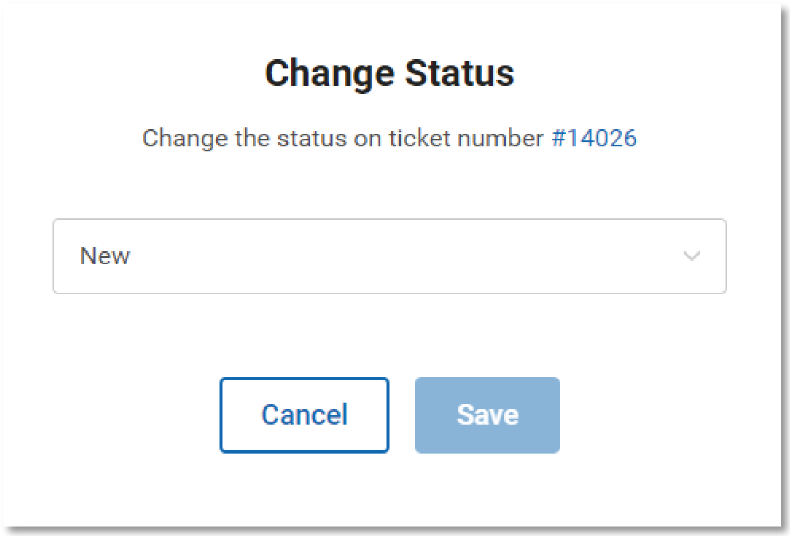
- Initial description of the issue.
- Date and time of submission.
- Contact on the ticket in Manage.
- Ticket status.
- Technician assigned to the ticket.
- Any notes that have been entered on the ticket.

Update a Ticket

The Customer Portal allows users to quickly update a ticket's status and add notes or attachments to a ticket.

Change a Ticket Status

To change the ticket status, click the status. Select the new status from the drop-down, then click Save.

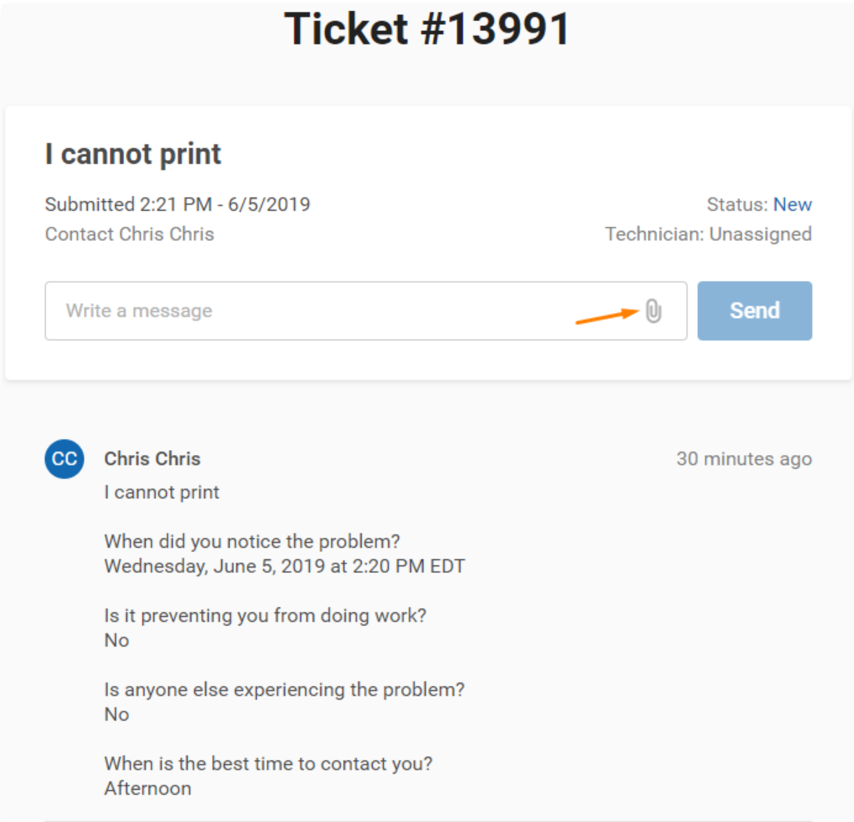


Add Notes to a Ticket

You can also enter notes on the ticket from this screen. Type a message into the message box, then click Send.

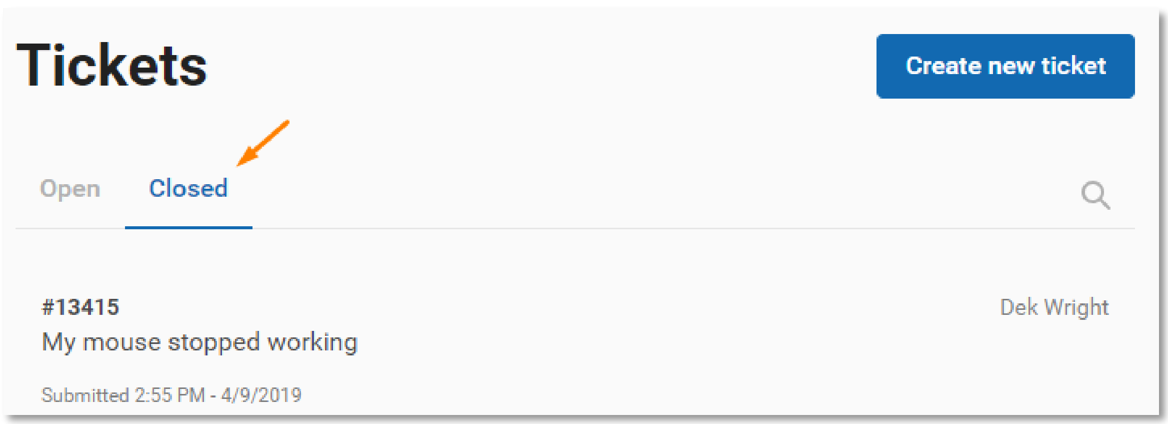
Attach a File to a Ticket

To attach a file to your message, click the paperclip icon in the message box.



Closed Tickets Tab

The Closed tickets tab displays your closed tickets.

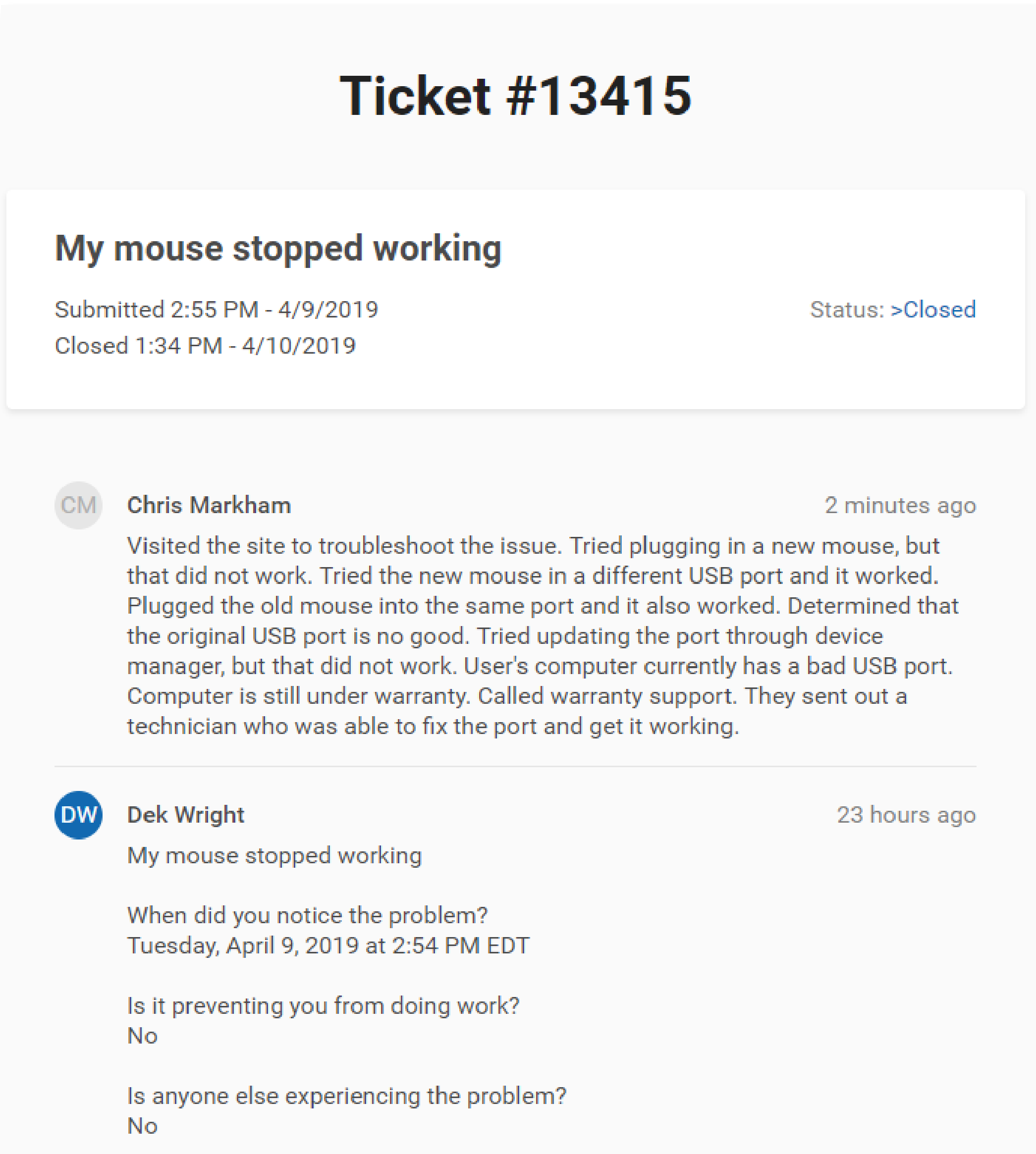


Click a ticket to view the ticket details and any notes that have been added to the ticket. Notes cannot be added to closed tickets.

Create a Ticket

To submit a ticket from the Tickets screen:

1. Select the **Submit a ticket** tile from the Home screen or click **Create new ticket** from the Tickets screen.

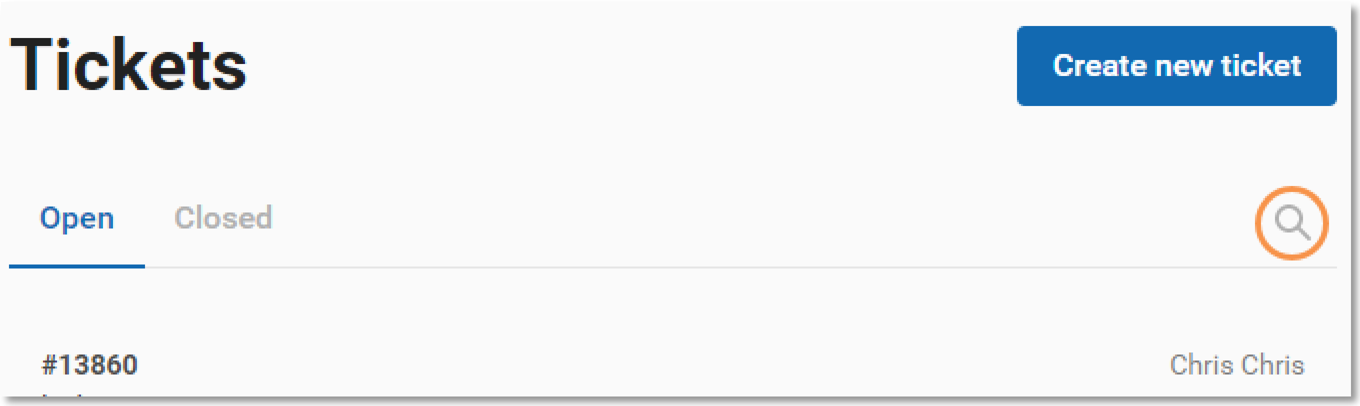


2. Select the type of request.
3. Complete the form, then click Submit.

Look Up a Ticket

To look up a ticket:

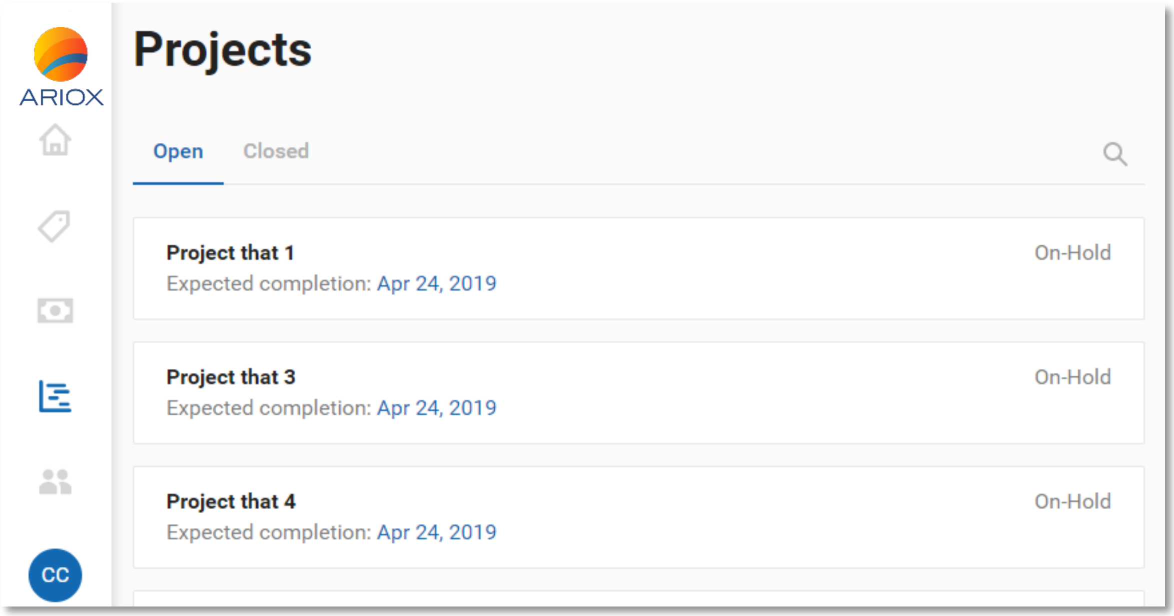
1. Select either the Open or Closed tab, then click the magnifying glass icon.



2. Enter a search term or the ticket number, then press the [Enter] key.
3. Click the ticket to open.

Customer Portal Projects Screen

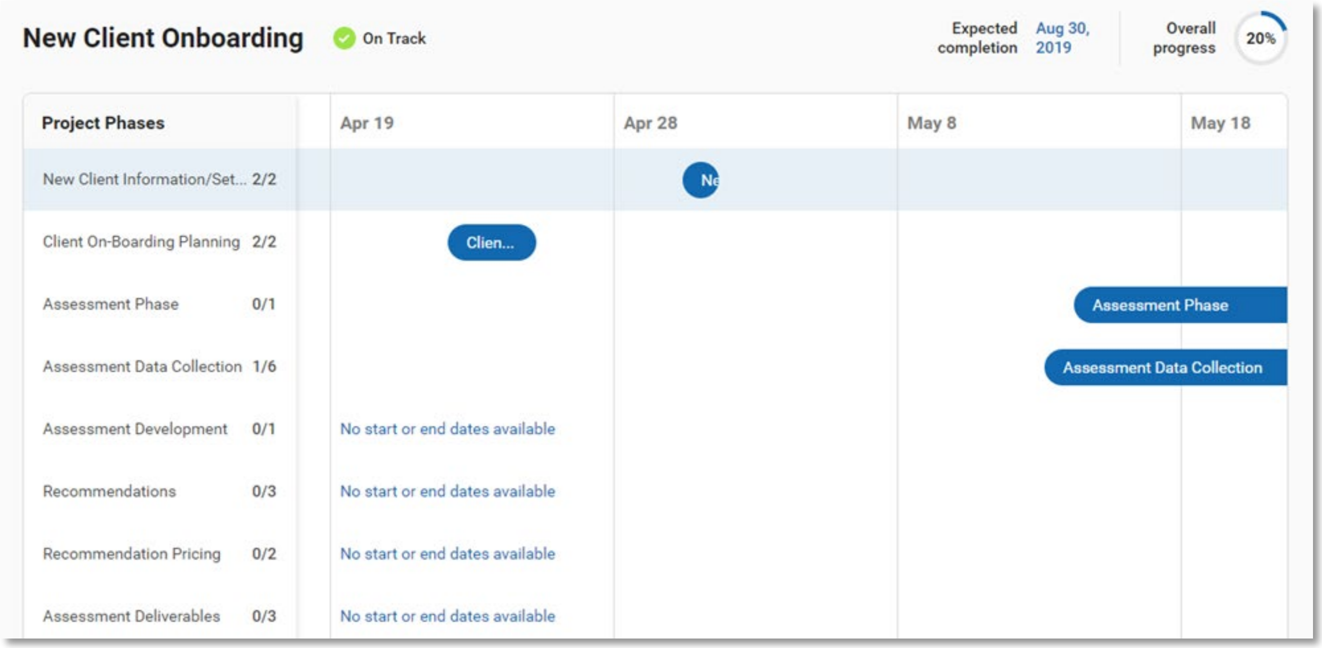
The Projects screen is where customers can check the status of ongoing projects and view project tickets. To access this screen, click the Projects icon in the left navigation or select the View a Project Tile on the Home screen. If you do not see the Projects screen, contact your company administrator to request a permissions update.



Project Gantt View

From the Projects screen, click into a project to view a Gantt chart with the following details:

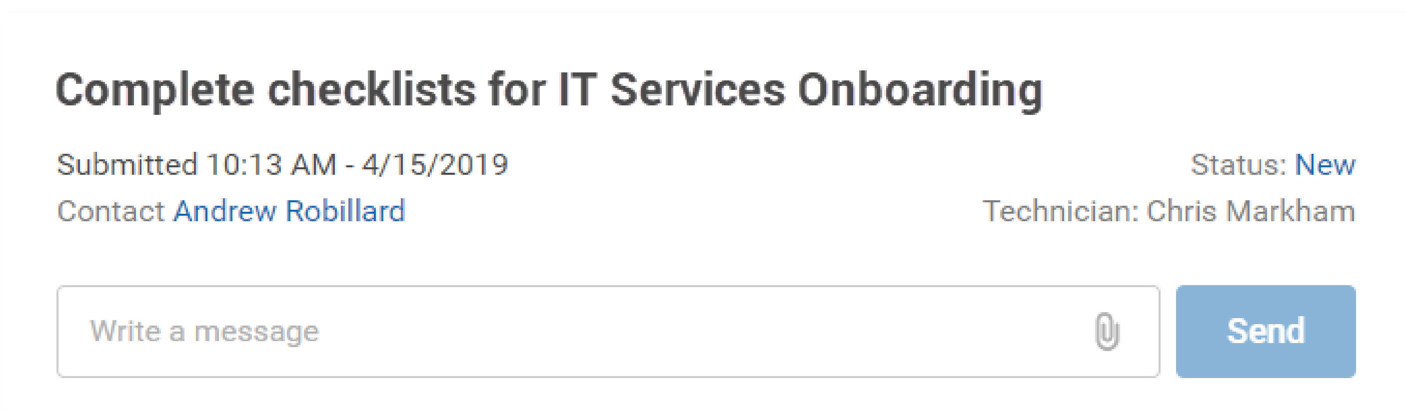
- The status of the project.
- The expected completion date of the project.
- How much of the project has been completed.
- The phases and sub-phases of the project.
- The duration of each phase.



View Project Tickets

Click a phase in the Gantt chart to view the expected completion date, number of completed tickets, and all tickets for that phase. Tickets with a strike-through are completed.

Click a ticket to view and add notes to the ticket and to view ticket attachments.



Look Up a Project

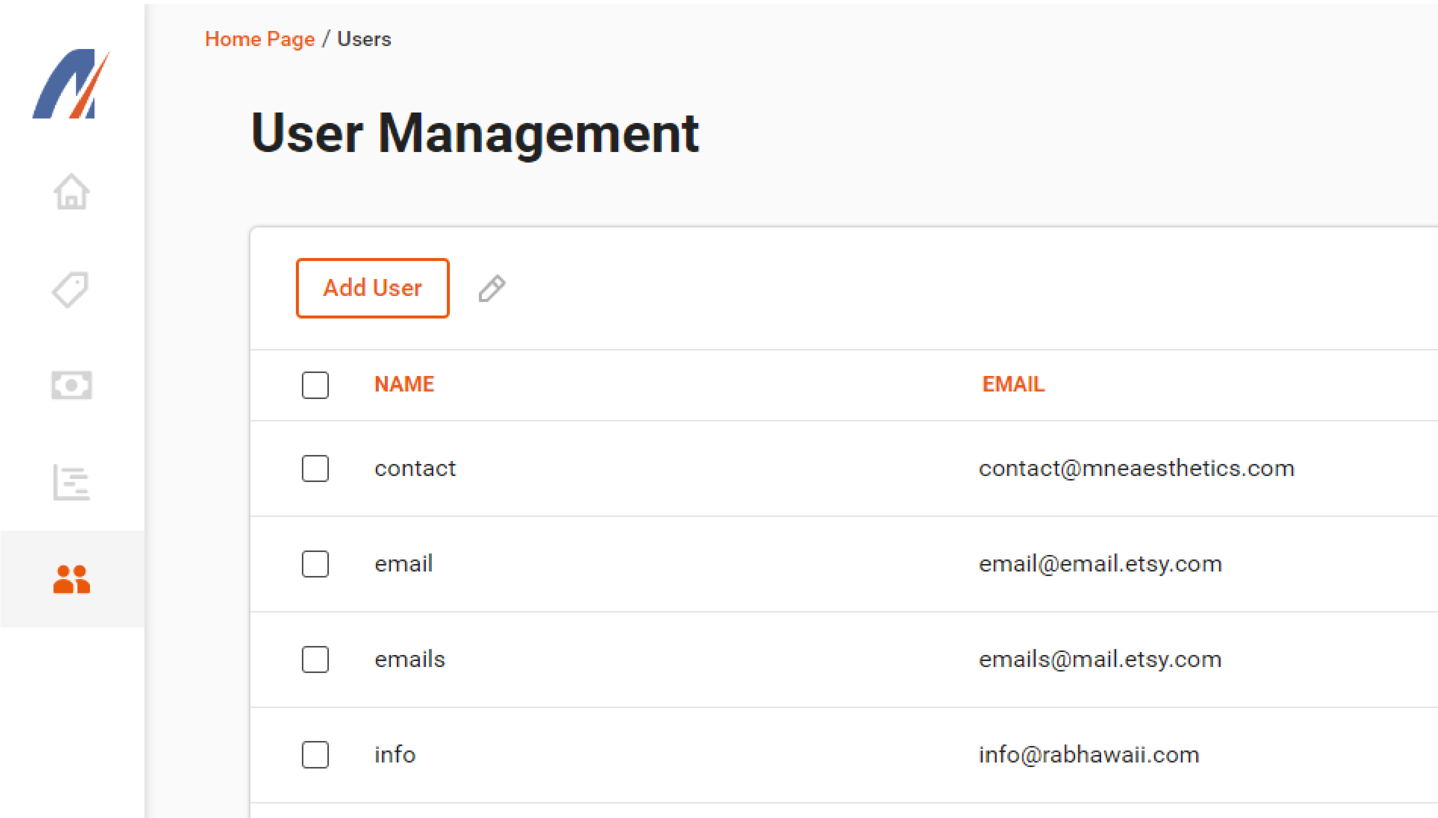
To look up a project:

1. Select either the Open or Closed tab.

2. Click the magnifying glass icon.
3. Enter a keyword or phrase, then press the [Enter] key

Customer Portal Users Screen

The Users screen enables customers to create new users and change user permission settings. Each customer may have one designated Administrator who will be granted permissions to manage users with the customer portal. If you are the designated Administrator for your Company- you can access this screen by click the User Management icon in the left navigation or select the Manage Users tile on the Home screen. If you do not see the User Management screen, you do not have the security role to add and edit user security.



User Roles and Permissions

Roles allow you to restrict access to only the features a user needs for their job function. The following table lists each role and its associated permissions. Only one role can be assigned to a user.

	Submit a ticket	Look up tickets	View a project	Manage a user
Full Admin	X	X	X	X
Ticket Manager	X	X	X	
Ticket Read-Only		X		
Standard User	X			

User Passwords

Users create their own passwords for the Customer Portal. Administrators cannot set passwords for other users.

Set Up Initial Customer Administrator Role

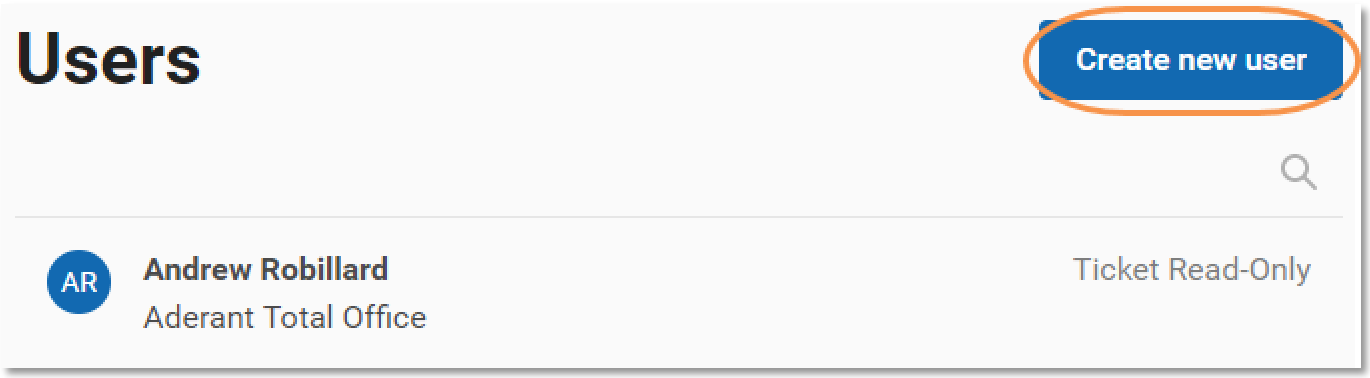
If you are the user who will manage adding additional members for your company- follow the instructions for accessing the portal and signing up here. Once you have completed sign-up and have successfully accessed the portal- submit a ticket requesting Admin Security Role assignment for your user. Our support team will receive this request, assign Admin function to your user, and notify of action completion. Upon refresh or new sign-in to the portal the "Manage User" icon should be available for you to add additional members.

Follow the instructions below once these actions have been completed- to add and edit additional members from your company to access the portal.

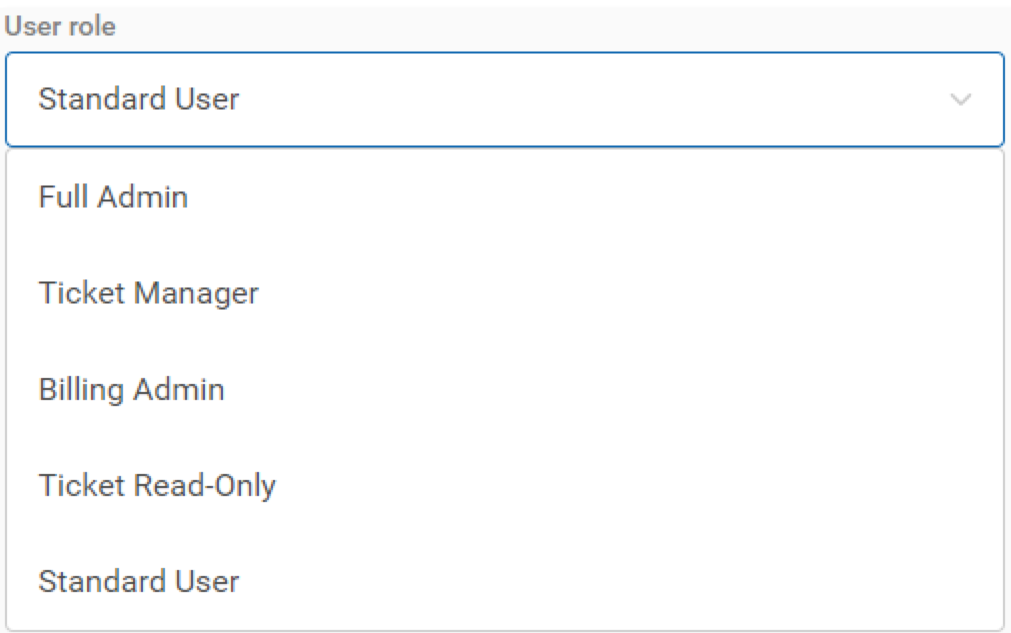
Create a User

At this time, users are not automatically notified via email after their account is created; you must contact the user after you create their account.

1) From the **Users** screen, click **Create new user**.



2) Enter the user's first and last name.
3) Select the type of email address, then enter the user's email address.
4) Enter a Phone Number for the User
    a) This ensures our support team has all contact information for efficient resolution of support tickets
5) Select a security role for the user.



6) Click Save.
    a) Note: users cannot be removed from the portal once they have been entered- if you wish to completely remove a user- please submit a ticket to our support team
7) Send user notification that they have been setup in the portal
    a) Provide link to portal sign-in screen and instruct them to select “Sign Up” button.

Change a User's Permissions

To change a user's permissions:

1. Navigate to Users.
2. Select the user from the user list.
3. Select the desired permission, then click Save.