



How to Use the Ariox Support Portal

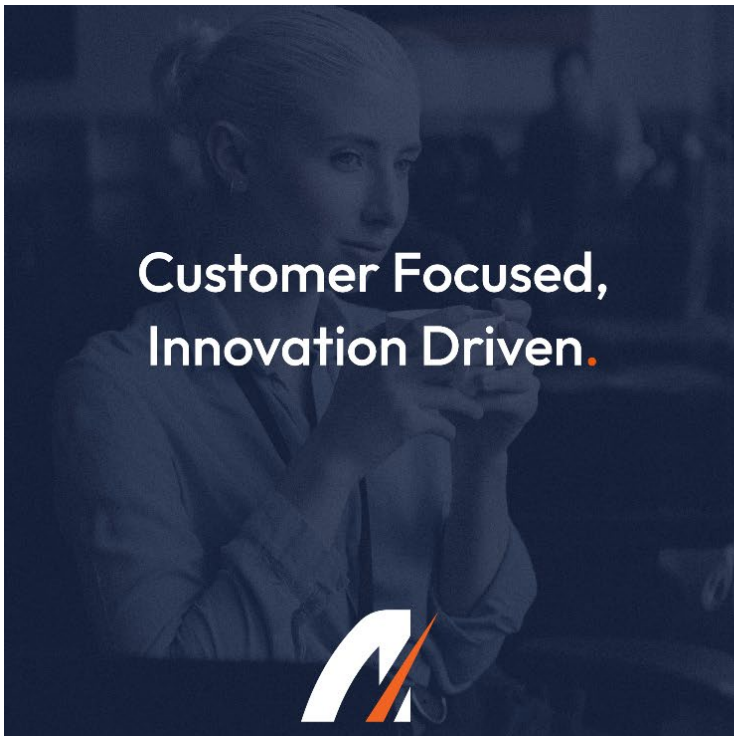
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Logging into the Customer Support Portal

- 1) Navigate to ariox.myportallogin.com



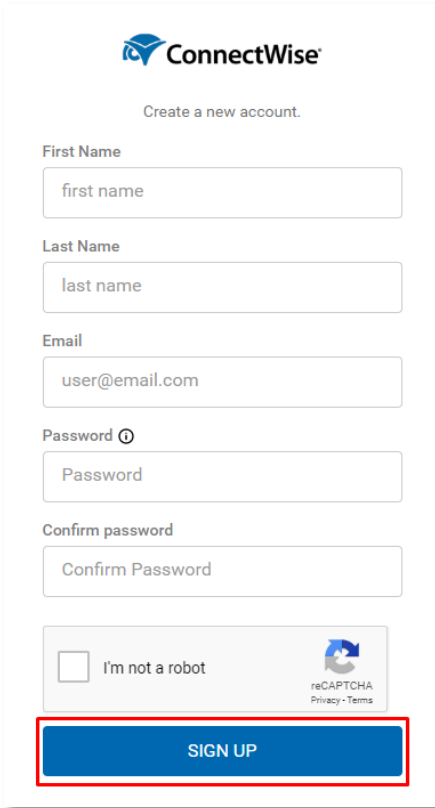
Welcome to the Ariox Support Portal

Issue Ticket Entry and Tracking

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

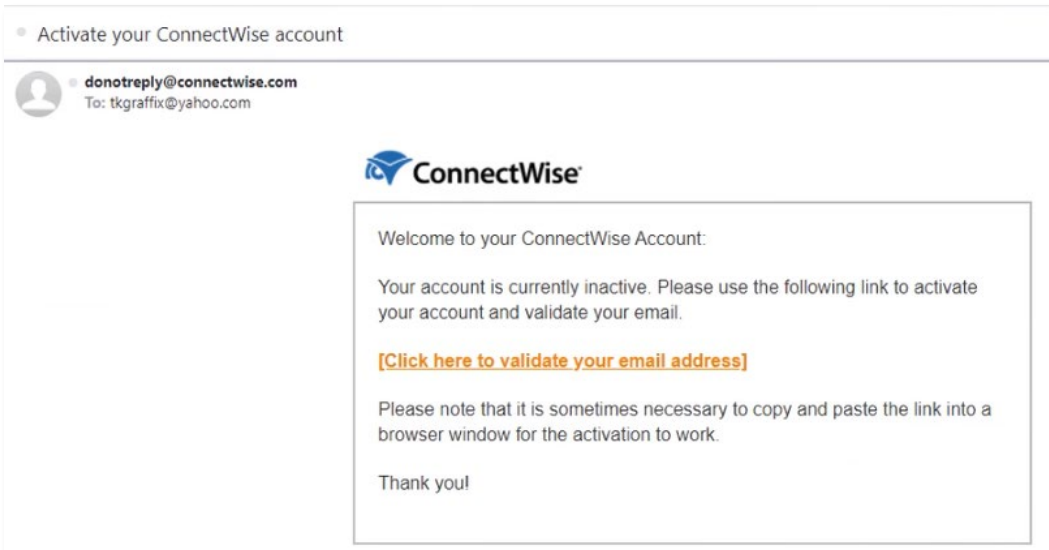
- 2) If you have not already generated a username and password- select the "Sign up" button and submit information on name, email, and password.

- 3) Create Password and click Sign up.



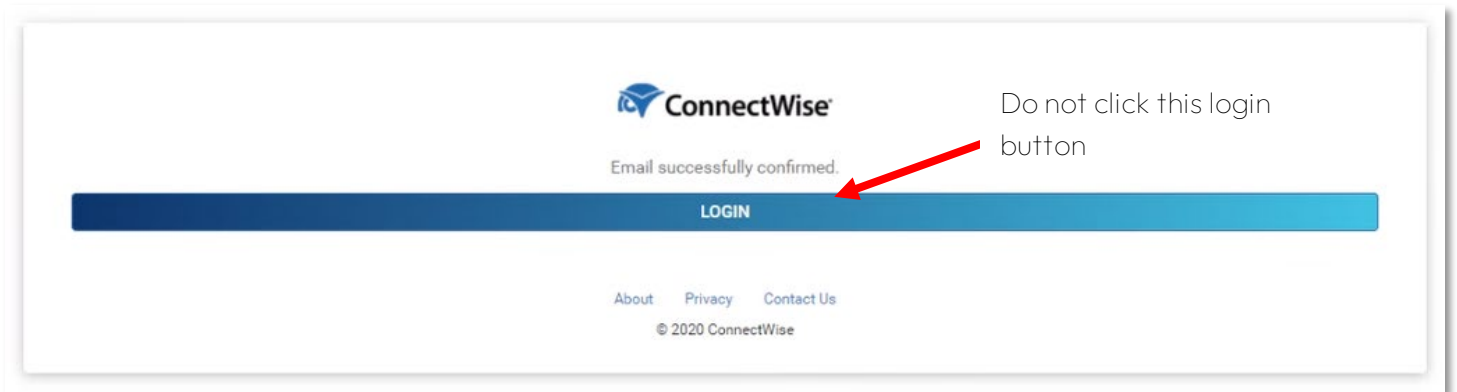
The image shows a web form for creating a new ConnectWise account. At the top is the ConnectWise logo and the text "Create a new account." Below this are several input fields: "First Name" with placeholder "first name", "Last Name" with placeholder "last name", "Email" with placeholder "user@email.com", "Password" with a strength indicator icon and placeholder "Password", and "Confirm password" with placeholder "Confirm Password". At the bottom left is a checkbox labeled "I'm not a robot" and at the bottom right is a reCAPTCHA logo with links for "Privacy" and "Terms". A blue "SIGN UP" button is highlighted with a red border at the bottom of the form.

- 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:



The image shows an email confirmation message. The subject line is "Activate your ConnectWise account". The sender is "donotreply@connectwise.com" and the recipient is "tkgraffix@yahoo.com". The message body features the ConnectWise logo and the following text: "Welcome to your ConnectWise Account:", "Your account is currently inactive. Please use the following link to activate your account and validate your email.", a link "[Click here to validate your email address]", "Please note that it is sometimes necessary to copy and paste the link into a browser window for the activation to work.", and "Thank you!".

- 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](#)

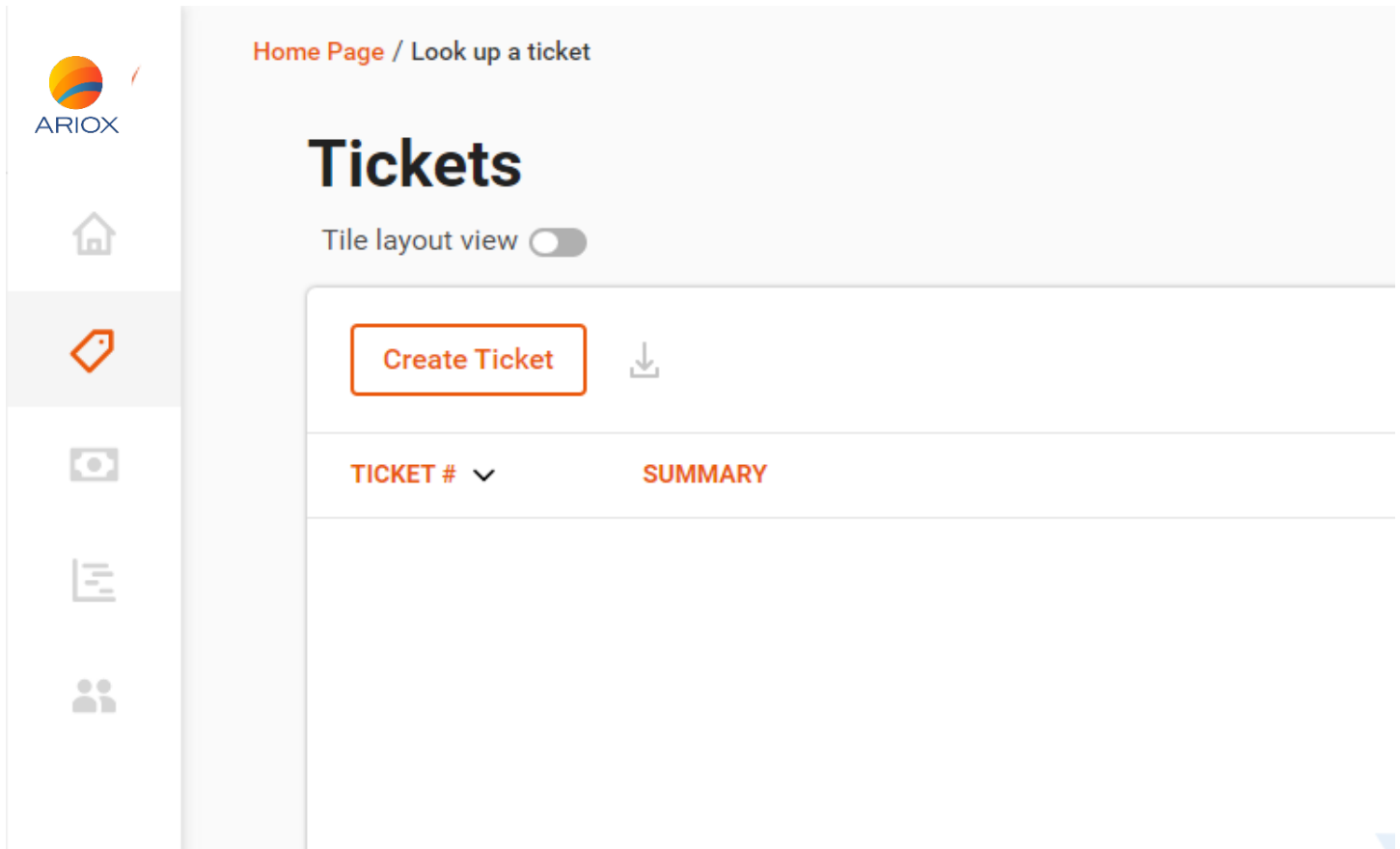
Customer Portal Tickets Screen

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.




Home Page / Look up a ticket

Tickets

Tile layout view

Create Ticket 

TICKET # 	SUMMARY
--	---------

View Ticket Details

Click a ticket to view the following information:

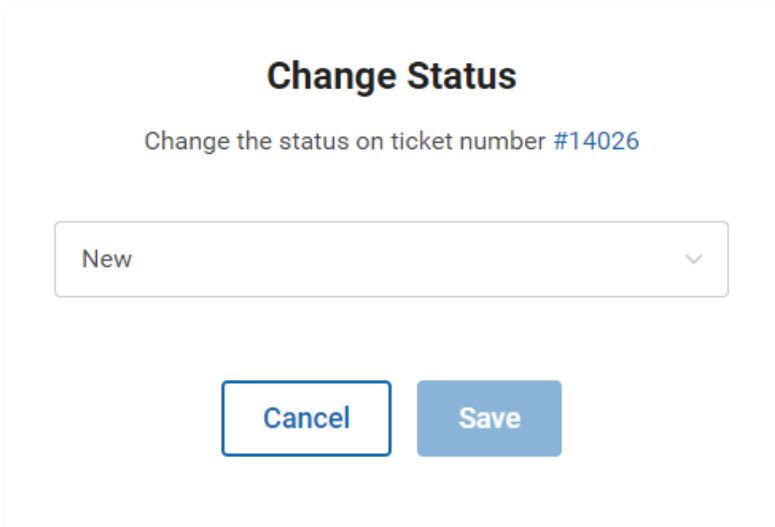
- Initial description of the issue.
- Date and time of submission.
- Contact on the ticket in Manage.
- Ticket status.
- Technician assigned to the ticket.
- Any notes that have been entered on the ticket.

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.



Change Status

Change the status on ticket number #14026

New

Cancel 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.

Ticket #13991

I cannot print

Submitted 2:21 PM - 6/5/2019 Status: **New**
Contact Chris Chris Technician: Unassigned

Write a message   Send

CC Chris Chris 30 minutes ago

I cannot print

When did you notice the problem?
Wednesday, June 5, 2019 at 2:20 PM EDT

Is it preventing you from doing work?
No


Is anyone else experiencing the problem?
No

When is the best time to contact you?
Afternoon

Closed Tickets Tab

The Closed tickets tab displays your closed tickets.

Tickets Create new ticket

Open **Closed**  🔍

#13415 Dek Wright

My mouse stopped working

Submitted 2:55 PM - 4/9/2019

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.

Ticket #13415

My mouse stopped working

Submitted 2:55 PM - 4/9/2019

Status: >Closed

Closed 1:34 PM - 4/10/2019



Chris Markham

2 minutes ago

Visited the site to troubleshoot the issue. Tried plugging in a new mouse, but that did not work. Tried the new mouse in a different USB port and it worked. Plugged the old mouse into the same port and it also worked. Determined that the original USB port is no good. Tried updating the port through device manager, but that did not work. User's computer currently has a bad USB port. Computer is still under warranty. Called warranty support. They sent out a technician who was able to fix the port and get it working.



Dek Wright

23 hours ago

My mouse stopped working

When did you notice the problem?
Tuesday, April 9, 2019 at 2:54 PM EDT

Is it preventing you from doing work?
No

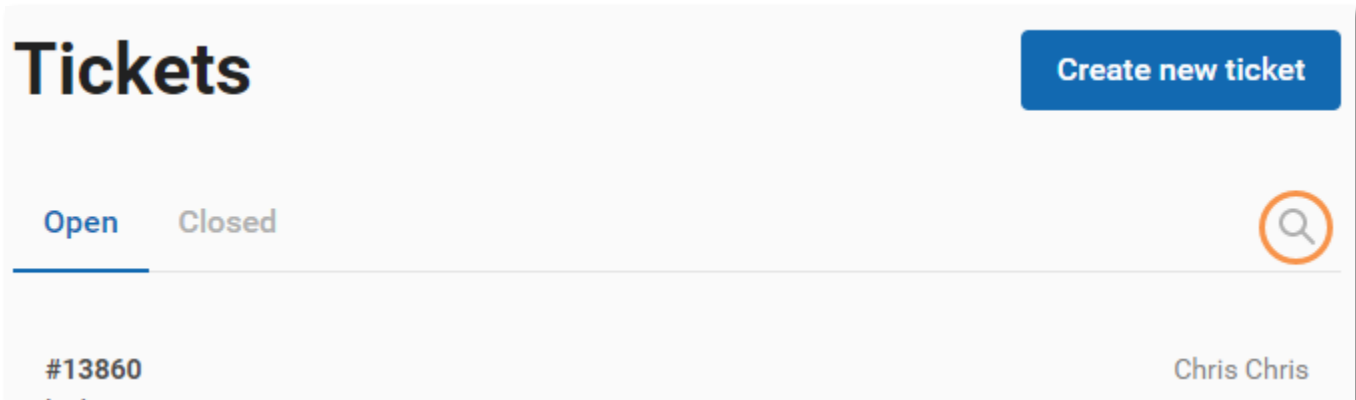
Is anyone else experiencing the problem?
No

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**.

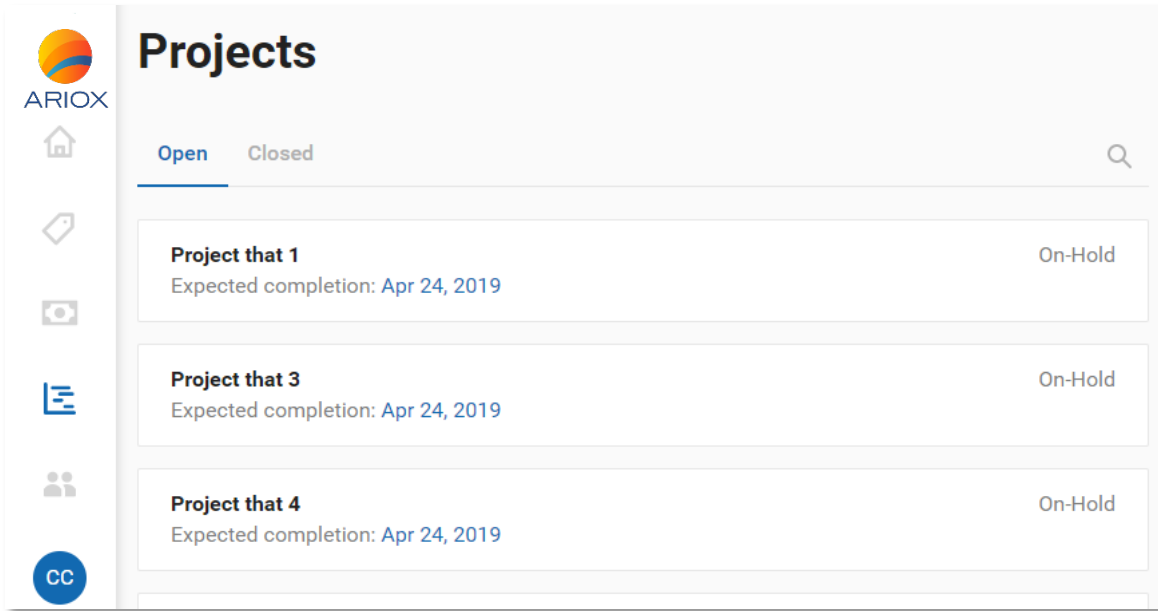


The screenshot shows the ARIOX Tickets interface. At the top left, the word "Tickets" is displayed in a large, bold, black font. To the right of "Tickets" is a blue button with the text "Create new ticket". Below "Tickets" are two tabs: "Open" and "Closed". The "Open" tab is selected, indicated by a blue underline. To the right of the tabs is a magnifying glass icon inside a circle. Below the tabs and icon is a horizontal line. Underneath this line, the ticket number "#13860" is displayed on the left, and the name "Chris Chris" is displayed on the right.

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

Customer Portal Projects Screen

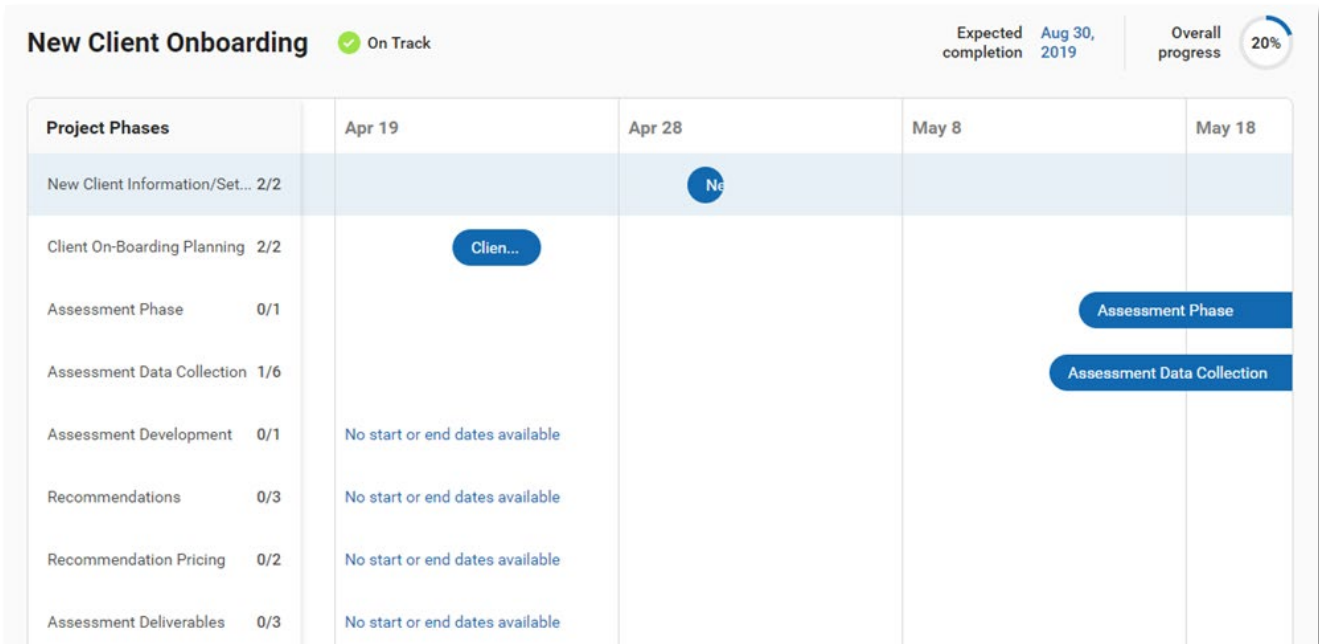
The Projects screen is where customers can check the status of ongoing projects and view project tickets. To access this screen, click the Projects icon in the left navigation or select the View a Project Tile on the Home screen. If you do not see the Projects screen, contact your company administrator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

Assessment Data Collection

Expected completion: Jun 6, 2019

Completed: 1/6

~~Initial On-Site Data Collection~~

Complete checklists for IT Services Onboarding

Deploy SAAZ or Other Data Collection Tools

Prepare initial assessment summary

Initial Recommendations Review Meeting

Secondary On-Site Data Collection

Close

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

Complete checklists for IT Services Onboarding

Submitted 10:13 AM - 4/15/2019

Status: **New**

Contact [Andrew Robillard](#)

Technician: Chris Markham

Write a message



Send

Look Up a Project

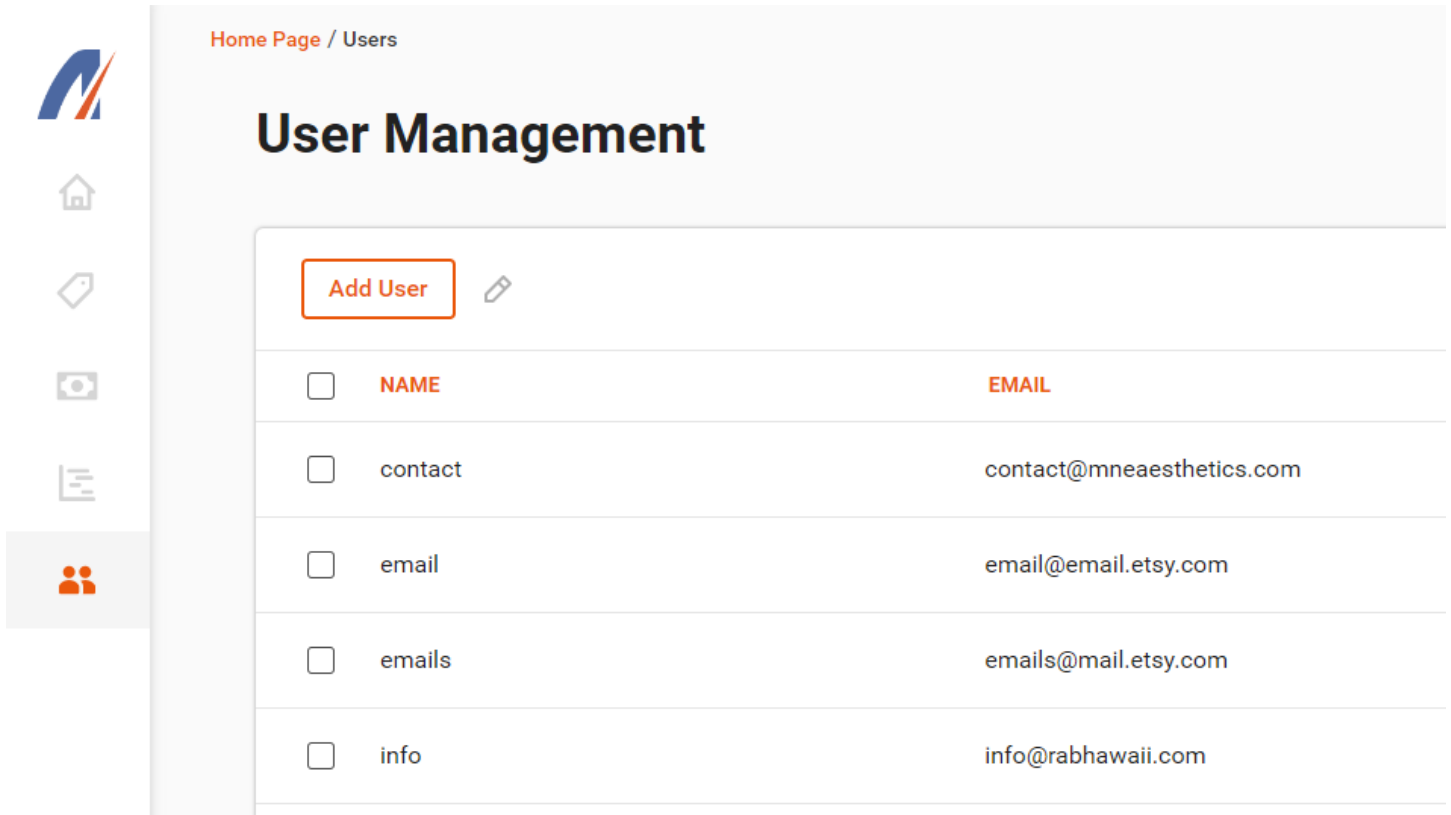
To look up a project:

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.



Home Page / Users

User Management

[Add User](#) 

<input type="checkbox"/>	NAME	EMAIL
<input type="checkbox"/>	contact	contact@mneaesthetics.com
<input type="checkbox"/>	email	email@email.etsy.com
<input type="checkbox"/>	emails	emails@mail.etsy.com
<input type="checkbox"/>	info	info@rabhawaii.com

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**.

Users

[Create new user](#)

AR **Andrew Robillard**
Aderant Total Office Ticket Read-Only

- 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.

User role

Standard User

Full Admin

Ticket Manager

Billing Admin

Ticket Read-Only

Standard 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.

Permission Role

Change the permission role for:

Ricky Bobby

Full Admin

This role has full functionality for all administrative features

Ticket Manager

This user can create tickets for other users and comment on existing tickets and view projects

Billing Admin

✓ This user can pay invoices as well as submit their own tickets and view projects

Ticket Read-Only

This user can only read their own tickets and cannot create them

Standard User

This user can create their own tickets and can comment on existing tickets

Cancel

Save