Client Portal Instructions

The client portal is designed so you can inform SmartPath of technical problems, track the resolution of those issues, and see the history of past problems you have encountered and how they have been solved.

Accessing the Portal

The portal is also available directly at www.smartpathsupport.com

Feel free to bookmark the link for easy reference.

Creating a Ticket

1. Use your provided username and password to login to the portal. The username will be your email address. If you don't have or forgot your password, call SmartPath at (270) 205-4709 for assistance.

2. Once you have logged into the Client Portal, you will be presented with a screen like this:
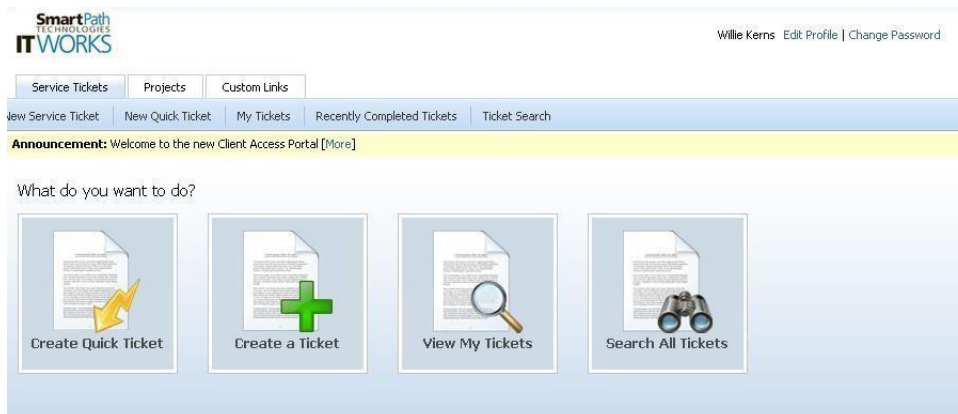
Click on the "Create a ticket" button. The Quick Ticket button works as well, but does not allow you to provide as complete details, which can hamper the speed of repairs.

3. Drop down under Request Type, and pick the type of problem you are having. If none of the options look correct, pick "General Request". Then, select the priority of the ticket:

   a. Critical – Over 90% of your office is unable to work at all. Examples of Emergency priority: Network and/or Wireless outage, server failure, or all users are unable to work in software packages your office utilizes on a regular basis. When you have an emergency, you are our top priority and we focus all efforts necessary to get you back to normal functionality as soon as possible.

   b. High – Defined as 10-40% of the users/computers being totally unable to work, internet outage, retrieving lost files from backup, a printer not working for an internal deadline you have such as meeting, a single PC has a virus or spyware

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infection, or a single component of a software package you utilize regularly is unable to work.

c. Medium – Can be defined as one computer/user unable to work.

d. Low – General questions, problems that don't affect users ability to work or that can be worked around. Configuring your application to print to a different printer, setting up a scanner, or application issues such as using a webcam to take patient pictures or being able to put a scanned picture into a document. **If it doesn't affect your ability to keep working, it's probably low priority.**

This is just a guide. We give you the ability to judge the level of your problem. However, when we get the ticket, we can change the priority if we deem it categorized incorrectly. Keep in mind all tickets submitted, regardless of priority, will be addressed within the timeframe defined by your agreement level.

4. In the ticket title field, put in a brief summary of the issue, for example, "Can't print to the LaserJet 4050." In the description field, put a detailed description of the issue you are having, for example, "When I try to print to the printer from Microsoft Word, I get an error message saying the printer is offline. I can print to the copier with no problem."

5. In the next section, your name will be the default selection and doesn't have to be changed. If you are reporting the problem for someone else in your organization, you can drop down and pick the name of the person for whom you are submitting a service request for.

6. Next, choose a configuration item if possible. A configuration item is SmartPath's way of documenting information about a piece of hardware of software, such as a computer or printer. Selecting the appropriate configuration item can save the technician time instead of calling and asking which device is having the problem. You do not have to select a configuration item. To do so, click the button that says "Associated With" and pick your name or the name of the person who is having the issue. The last box in that section says "Configuration Item".

7. The last section, Follow-on questions, will provide valuable information to that will allow us to troubleshoot and resolve the issue much quicker. The follow on questions will be specific to the type of request you indicated at the top. For example, if you pick "Printer Problems" at the top, the Follow-On questions will be things like, "What printer and where is its location? Can anyone else print to the printer? Does printing to an alternate printer work?" These questions will allow us to handle the issue much quicker than having to call and ask you the introductory questions to begin working on your problem.

Viewing and Editing Your Existing Tickets

1. From the main login page, click the "View My Tickets" button. Clicking on this button will allow you to view all the tickets you have open. When you click on the button, you will

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see a ticket number, the title of the ticket, and the date the ticket was created. Click on the ticket number and you'll be taken to a screen that shows all of the information

about this support request, what work has been done on the ticket, and where the ticket currently stands.

2. You will notice at the top of the screen an "Add Note" and "Add Attachment" button. While we are working on an issue and have your ticket open, you can use the "Add Note" to submit additional information to us regarding the ticket. If you click the add attachment button, it will allow you to upload an attachment – for example a word document with a screenshot of an error message you are receiving, or a copy of a file you are having a problem with.

Viewing Past Tickets

Often it's desirable to reference past tickets to see how a problem was solved or what course of action was taken with a certain issue.   The Search All Tickets button will allow you to see and search all closed and completed tickets.

Viewing All Tickets

If you have been given manager level permission in the portal, the "Search All Tickets" button gives you access to all tickets for your organization.

If you have any questions or require assistance, please contact SmartPath by email or calling 270-205-4709.

Screenshots

It often times helps us to be able to see an error message or what is on your screen at the time you have a problem. You can take a screenshot of your monitor quite easily and attach it to your ticket or e-mail it to us. There are two quick and easy ways to take screenshots.

1. Hit the Print Screen button (at the top of the keyboard above the arrow keys). Then, launch Microsoft Word or Microsoft Paint and paste the screenshot either by hitting the CTRL+V keys together, right clicking and choosing paste, or going to the Edit menu at the top and then clicking paste.   Then save the document and attach it to your ticket or email it to us.
2. Use the snipping tool built into Windows.   Hit the Windows key on your keyboard, and type the word snip – you'll see the snipping tool pop up. Click on it.   The snipping tool allows you to use your mouse to draw a box around an area on your screen to capture it. Click the Save button, and save the screenshot. You can then attach that screenshot to your ticket or e-mail it to us.

Important Information to Print and Keep Handy

SmartPath Support – 270-205-4709 or support@smartpathtech.com

SmartPath Support Portal – www.smartpathsupport.com

After Hours Support – 270-205-4709, and dial ext. 501 to leave an emergency voicemail.

Can't login?

1) Try using the password we typically will reset accounts to – Capital first initial, lowercase second initial, lowercase second initial, lowercase first initial, the current year, and a !.
   For example, John Doe's reset password would be Jddj2017!
2) Make sure the username is your username and not administrator or another username.

Please leave your computer logged off but turned on at the end of each day!

Thank You!

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