





# Autotask Customer Portal

May 2024

Freddie Wilks

# Account Setup

# Account Setup

Upon being granted access to the portal, you will be sent an email like this.

To start, click "**Set Your Password**".

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Emerge Digital Support <support@emerge.digital>

To: Freddie Wilks

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Tue 2024-05-14 10:54 AM

**Caution:** This is an external email from Outside of Emerge Digital. Please take care when clicking links or opening attachments. When in doubt, do not open!



## Welcome to the Client Portal

Hi Freddie,

Whilst we make some exciting changes to our Client Portal, we are providing you with a temporary portal which provides the same basic functionality as before.

Based on your permissions, the portal may allow you to submit customer service tickets, track the status of your tickets and project tasks, and/or view additional key information from Emerge Digital.

To access the portal, you first need to set your password. Your username is **freddie.wilks@emerge.digital**.

**Set Your Password**

Once your password is set, you can visit <https://emerge.ITClientPortal.com/>

Having any issues? Just reply to this email and we'll help you out.


## Account Setup

You will be taken to the account setup screen (right).

Paste your username (found on the setup email) into the "User Name" box and choose a unique password.

To access the portal, you first need to set your password. Your username is `freddie.wilks@emerge.digital`.

Once done, click "Change Password" to continue.

 Emerge Digital

### CHANGE PASSWORD

User Name:

Password:

Confirm Password:

[Change Password](#)

Unauthorized access is prohibited

Password Requirements:

- At least eight characters long
- Must use at least three of the following: lowercase, uppercase, numbers, symbols
- Cannot be the same as your last 3 passwords
- Cannot contain any spaces or single quotes (')

## Account Setup

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Next, setup Multi-Factor Authentication by scanning the QR code with an **Authentication App**.

We recommend you use Microsoft: [How to use the Microsoft Authenticator app - Microsoft Support](#)



### CLIENT PORTAL

**Two-factor authentication (2FA)** is an additional security layer to address the vulnerabilities of using a standard password approach.

#### How to Set Up

1. Download or open your authentication app.
  - a. Ex: Google Authenticator, Duo, Okta, Microsoft Authenticator, etc.
2. Scan this QR code with your authenticator.
3. Enter the code generated below.



[Refresh Code](#)

Verification Code

**Enable 2FA**

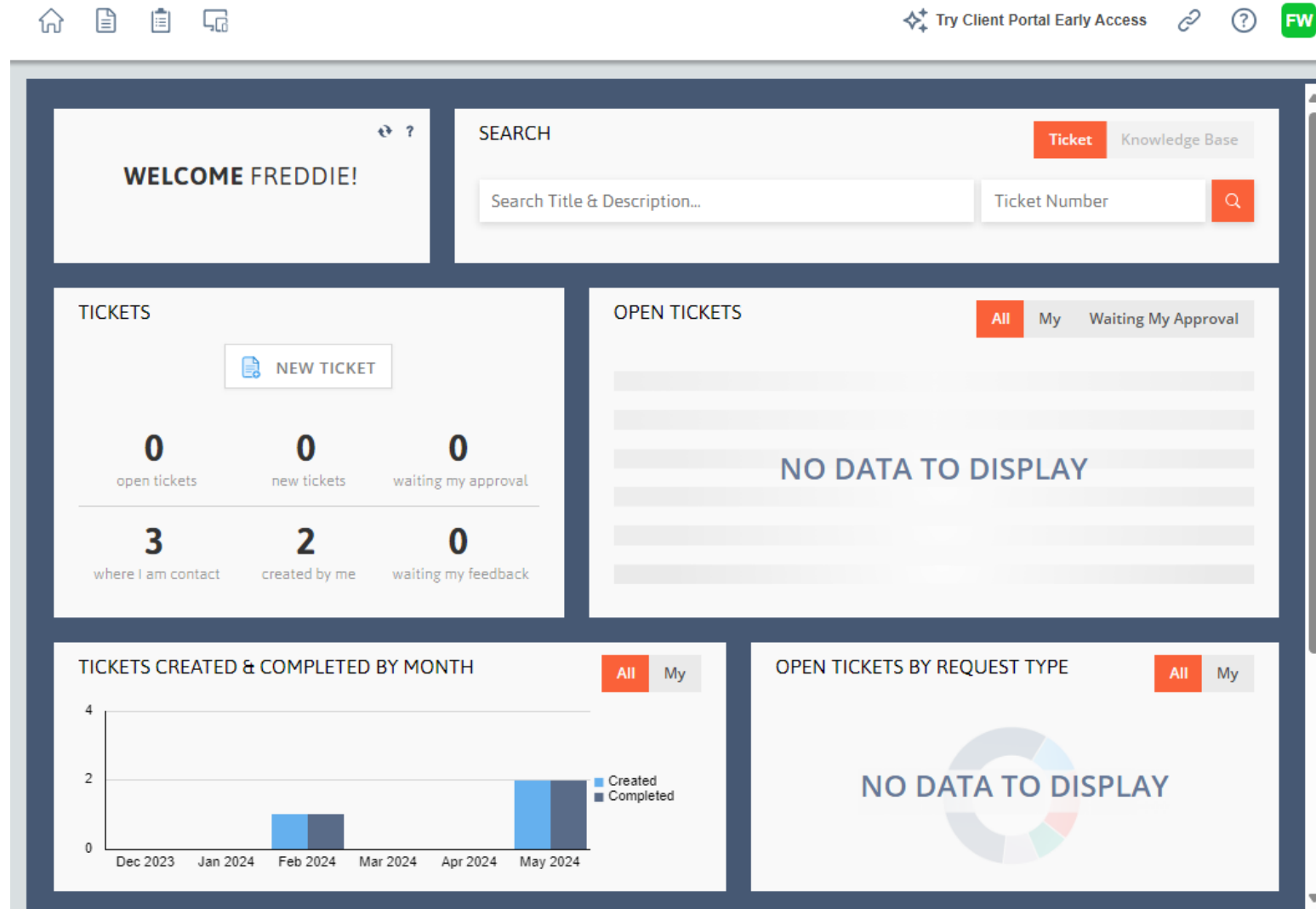
Once your password is set, you can visit <https://emerge.ITClientPortal.com/>

## Account Setup

When you've fully set-up your account, bookmark and browse to:

[emerge.ITClientPortal.com](https://emerge.ITClientPortal.com)

After signing in with the account you have just created, you will be taken to the Main Dashboard (right).



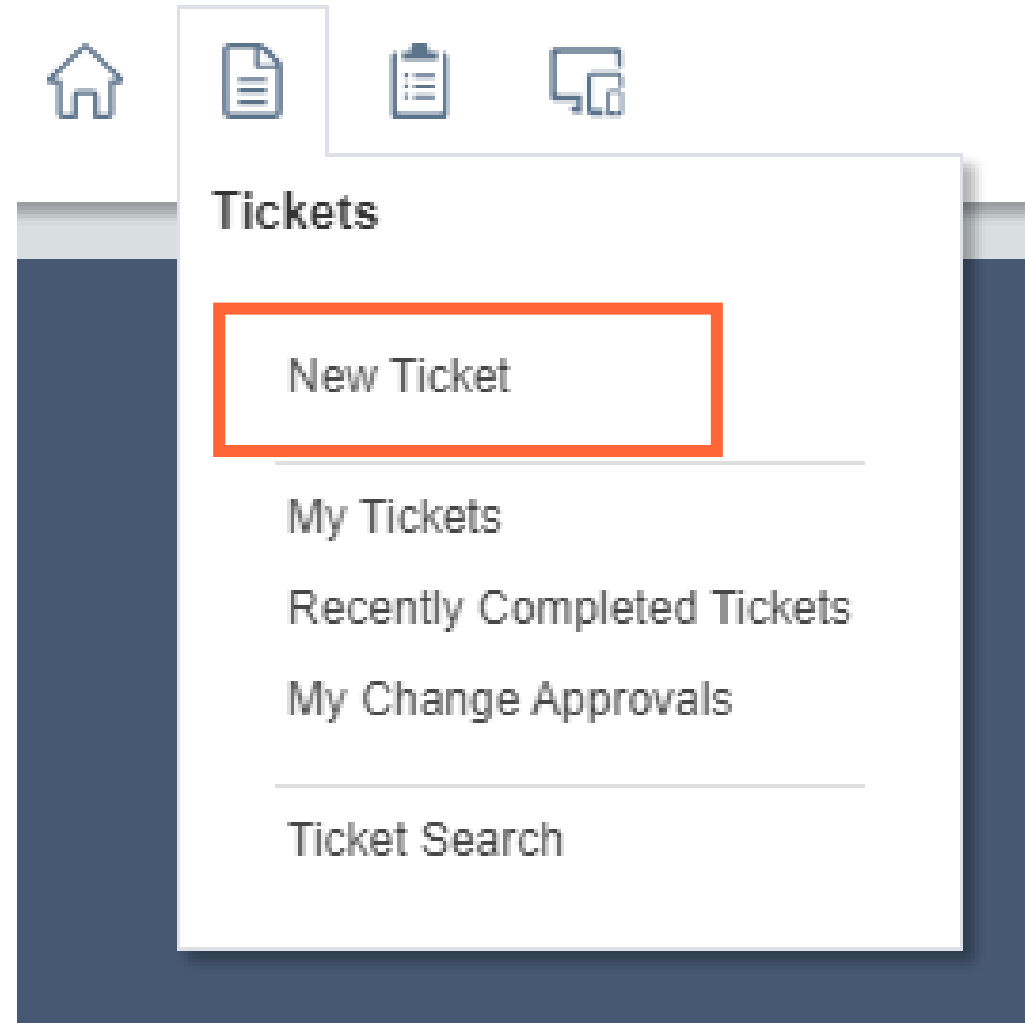
# Raising a Ticket



## Raising a Ticket

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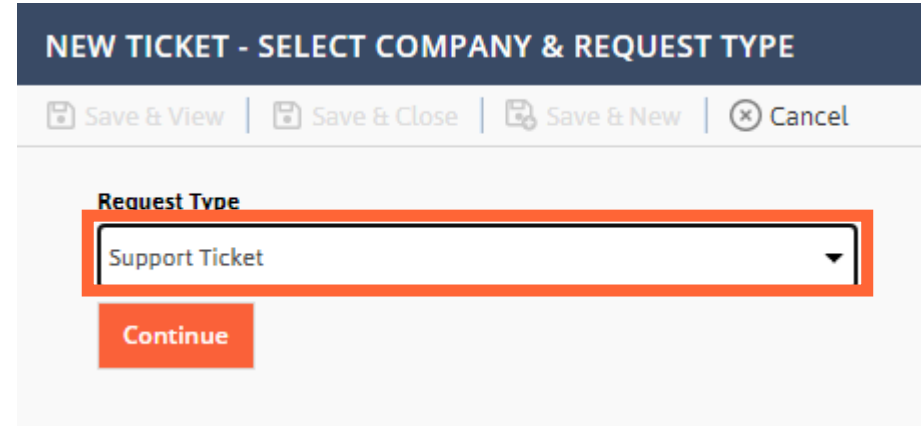
To raise a new ticket, hover over the document icon and click "New Ticket".



## Raising a Ticket

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Next, select "Support Ticket" from the drop-down shown (right) and click "Continue".



NEW TICKET - SELECT COMPANY & REQUEST TYPE

Save & View | Save & Close | Save & New | Cancel

Request Type

Support Ticket

Continue

# Raising a Ticket

Next you will be shown the main ticket creation page.

Fill in all sections in as much detail as possible to help the engineers resolve your issue faster.

Click "**Save & View**" when you are satisfied with all the information you've provided.

Alternatively, if you'd like to attach a file, click "**Save & Attach File**".

The screenshot shows a web form titled "NEW TICKET" with a dark blue header. Below the header is a navigation bar with four buttons: "Save & View" (highlighted with an orange box), "Save & Close", "Save & New", and "Cancel". The form is divided into two main sections: "Incident" and "TICKET DETAILS".

**Incident:** A dropdown menu is set to "SUPPORT TICKET".

**TICKET DETAILS:**

- Title:** A text input field containing "Please help me setup the client portal".
- Company:** A dropdown menu set to "Emerge Digital".
- Contact:** A dropdown menu set to "Freddie Wilks".
- EMAIL:** "freddie.wilks@firstsolution.co.uk".
- PHONE:** "01242 335549".
- Description:** A text area containing "I need assistance getting setup in the portal." and "I am available at 10:00 and 14:00 next Monday".

**BACKGROUND QUESTIONS:**

- Best method to contact you?:** A dropdown menu set to "mobile".
- If, telephone please provide number:** A text input field containing "+44 7123456789".

At the bottom right of the form are two buttons: "Save Ticket" and "Save & Attach File".

# Raising a Ticket

You will be shown your freshly created ticket.

To go back, click "Close".

T20240514.0024 - Please help me setup the client portal

Close

Incident: [T20240514.0024](#)

SUPPORT TICKET

**Please help me setup the client portal** Search Knowledge Base

Created: 14/05/2024 11:02 AM by Freddie Wilks

TICKET DETAILS	ACTIVITY
<p><b>Company</b> Emerge Digital</p> <p><b>Contact</b> Freddie Wilks</p> <p>EMAIL <span>freddie.wilks@firstsolution.co.uk</span></p> <p>PHONE <span>01242 335549</span></p> <p><b>Description</b> I need assistance getting setup in the portal.</p> <p>I am available at 10:00 and 14:00 next Monday</p> <p>Background Questions Q: Best method to contact you? A: mobile</p> <p>Q: If, telephone please provide number A: +44 7123456789</p>	<p>Add a Quick Note <span>0 / 1000</span></p> <div><p><span>Submit</span></p><p><span>Note</span> <span>Attachment</span></p></div>

## Raising a Ticket

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With every ticket creation, you will receive an email confirmation like the this one (right).

Click "[View & Update Your Ticket](#)" to be taken back to the ticket you have just made.

### We've received your support request

Hi Freddie,

We've received your support request and a ticket has been logged. One of our engineers will begin working on it as soon as possible.

The details of the ticket are listed below. If you need to add any more information, reply to this email or add a note using the Client Portal.

[View & Update Your Ticket](#)

**Ticket Number:** T20240514.0024

**Title:** Please help me setup the client portal

**Description:** I need assistance getting setup in the portal.

I am available at 10:00 and 14:00 next Monday

Background Questions

Q: Best method to contact you?

A: mobile

Q: If, telephone please provide number

A: +44 7123456789

**Priority:** P4 - Normal

**Creation Date/Time:** 14/05/2024 11:02 AM (GMT)

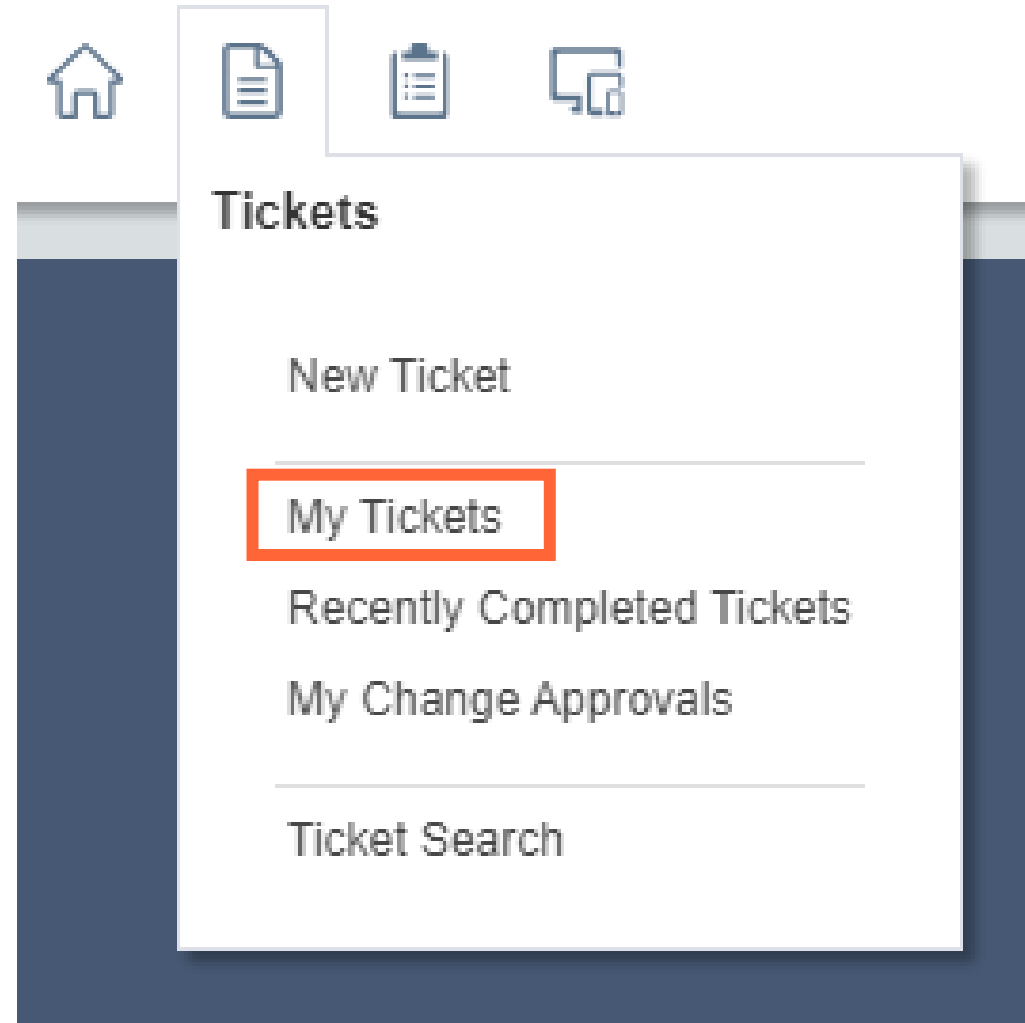
**Due Date:** 15/05/2024

# Viewing Open Tickets

## Viewing Open Tickets

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To view active tickets, hover over the document icon and click "My Tickets".

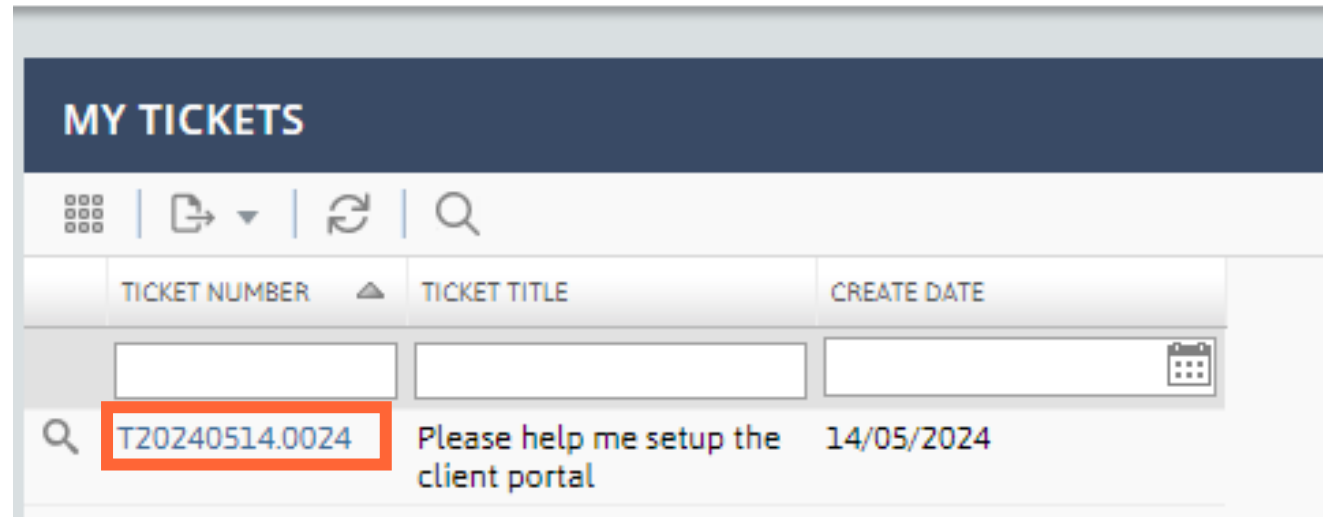


## Viewing Open Tickets

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You will be taken to the "My Tickets" view. Here you can see all tickets you currently have active.

To view a ticket, click the **ticket number**.

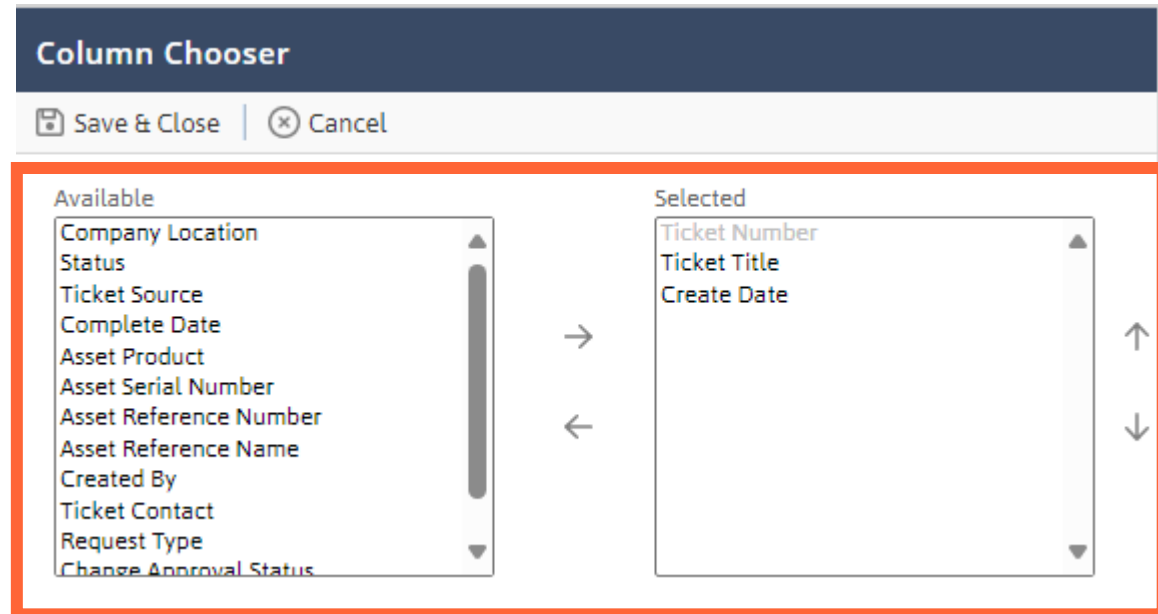
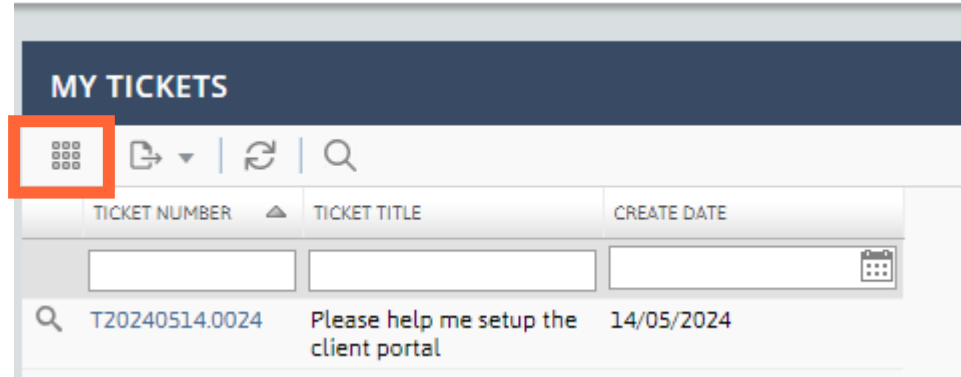


MY TICKETS		
TICKET NUMBER	TICKET TITLE	CREATE DATE
<input type="text" value="T20240514.0024"/>	Please help me setup the client portal	14/05/2024



# Viewing Open Tickets

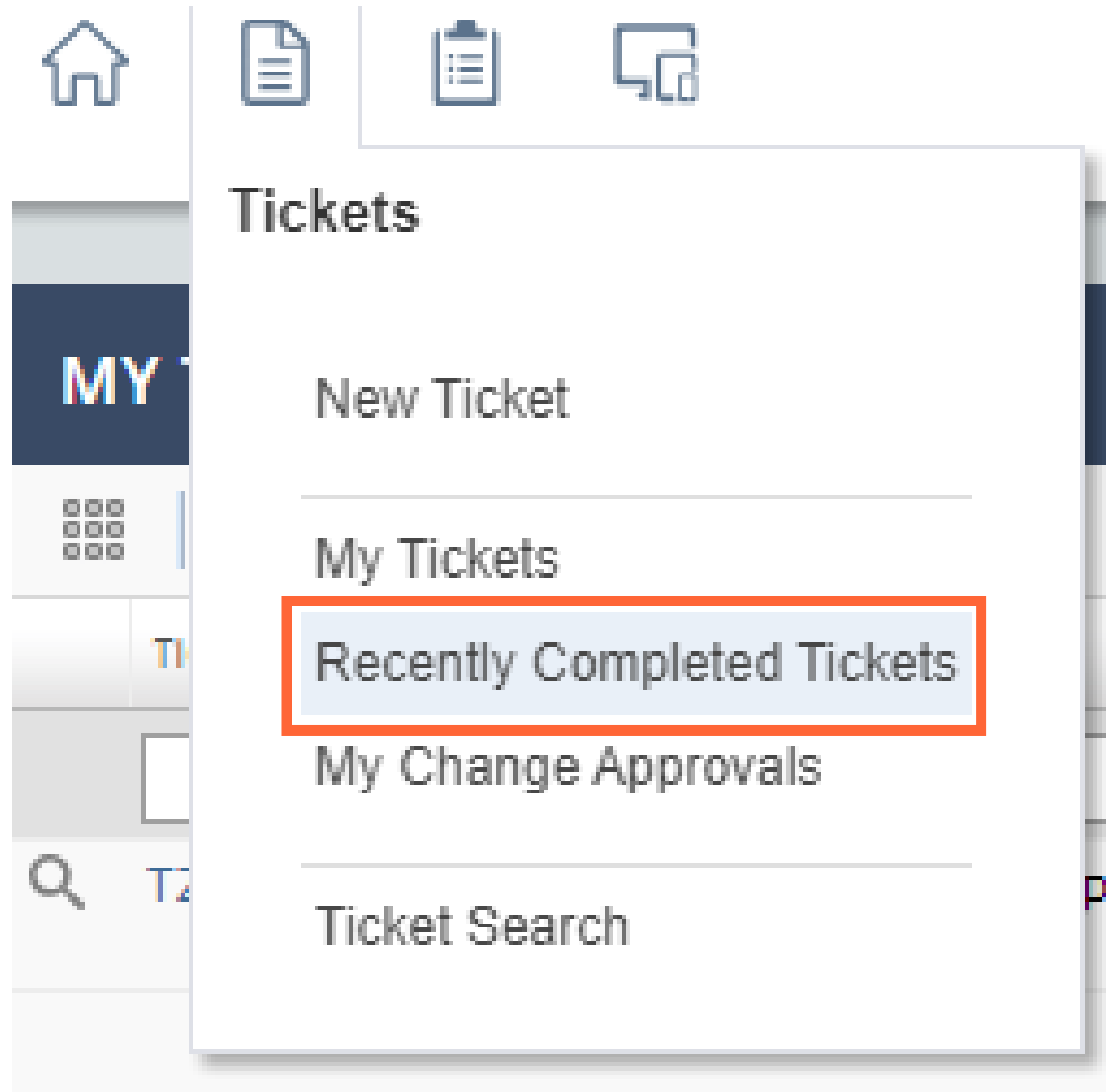
To customise the columns in your view, select the **Burger** and use the arrow icons to move any chosen columns in and out of view.



# Viewing Completed Tickets








## Viewing Completed Tickets

To view any historic tickets, hover over the document icon and click "Recently Completed Tickets".



## Viewing Completed Tickets

You will be taken to the "Recently Completed Tickets" view. To view a ticket, click the **ticket number**.

RECENTLY COMPLETED TICKETS			
			
TICKET NUMBER	TICKET TITLE	CREATE DATE	
 T20240508.0065	HELP WITH CUSTOMER PORTAL	08/05/2024	
 T20240513.0024	I need help with the client portal	13/05/2024	

[emerge.digital](http://emerge.digital)