



## HOW TO USE THE 5NINES CLIENT PORTAL

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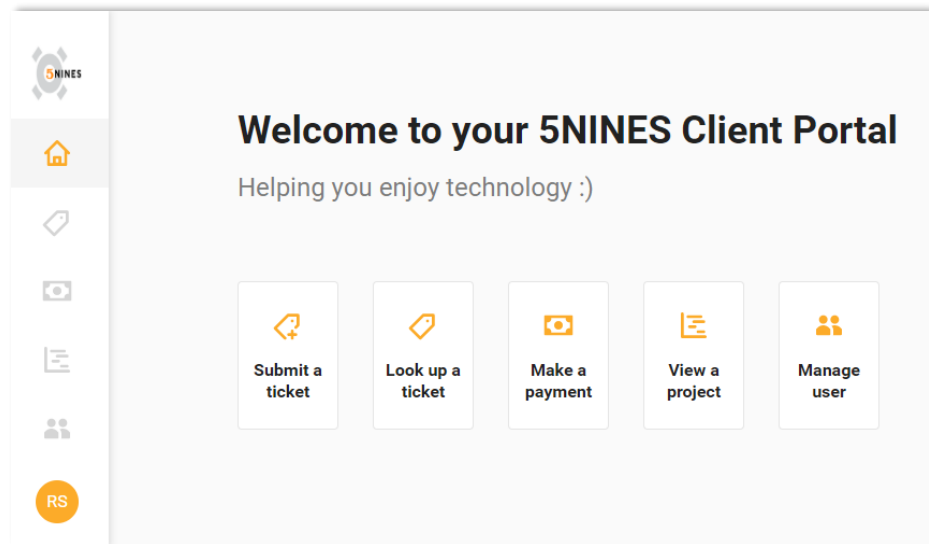
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## CUSTOMER PORTAL HOME SCREEN

The New Customer Portal makes it easy to perform a variety to tasks. From the Home screen, you can:

- Submit and look up service tickets
- Make payments and view invoices
- View projects and project tickets
- Manage user permissions



## LOGGING INTO THE CUSTOMER PORTAL

To log in to the Customer Portal:

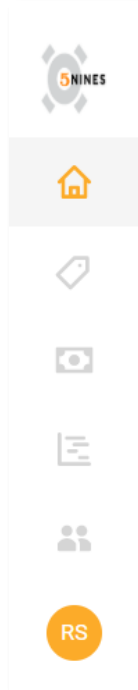
1. Using the Google Chrome web browser: Navigate to <https://5nines.myportallogin.com/>
  - Currently Chrome is other browser that supports the new portal.
2. Select a sign-in option:
  - **Sign up: Create a new ConnectWise SSO account.**
    - If you have not yet logged into the new Connectwise Portal you must use this option to create your account first!
  - **Sign in:** If you have created an account with the new portal you can use this section in order to sign in.
    - If you have already created an account in the new portal you can simply Click "Forgot Password" to get a new portal password via email.
      - If you receive an email stating that you do not have an account with us go back to the main portal page and use the the "Sign Up" button to create an account



## LOG OUT OF THE CUSTOMER PORTAL

To log out of the portal:

1. Click the **circle** with your initials at the bottom of the left navigation.



Select **Log out**.

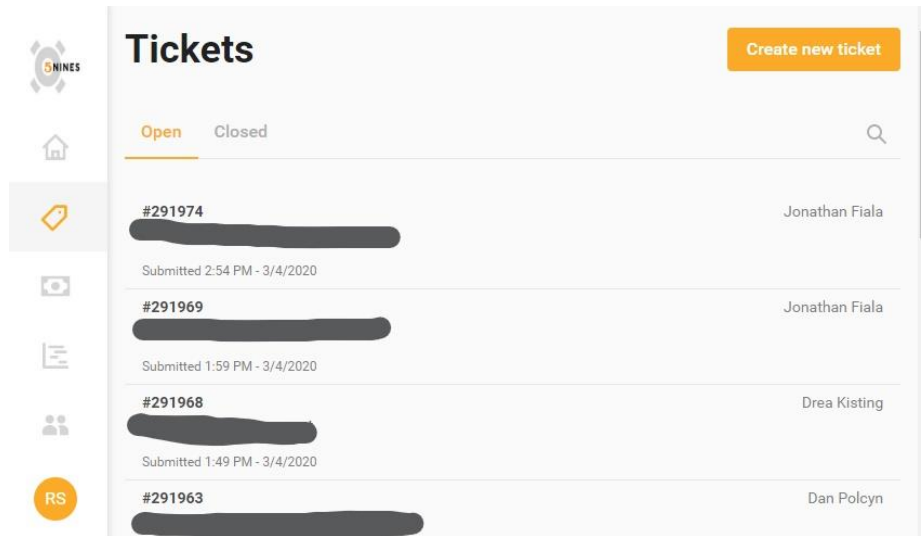
## TICKETS

The Tickets screen allows you to create and view tickets. To view the Tickets screen, click the Tickets icon from the left navigation bar.

## 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.



### CREATE A TICKET

To submit a ticket from the Tickets screen:

1. Click **Create new ticket** from the Tickets screen or select the **Submit a ticket** tile from the Home screen.
2. Select the type of request.

### 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. Please note that text must be entered in order to update 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 #291883

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. All file types are supported. There is no file size limit for On-Premises partners; you can attach any size file, provided you have enough free space on the disk. Cloud partners have no file size limit, but there is a 30 second time limit for uploads.

### Ticket #286786

#### Residential Internet Management

Submitted 1:00 AM - 1/3/2020 Status: **Waiting on Resource**  
Contact **Raine Streicher** Technician: Raine Streicher

Write a message 📎 **Send**

**T** **template549** 2 months ago  
Starting a Monthly session in order to keep up with Residential Internet maintenance.  
  
This includes keeping the Audit sheet up to date and making sure it matches the switches.



## CLOSED TICKET TABS

The Closed tickets tab displays a list of all closed tickets.

The screenshot shows a web interface for managing tickets. At the top left is the heading "Tickets". To the right is a yellow button labeled "Create new ticket". Below the heading are two tabs: "Open" and "Closed", with "Closed" being the active tab. A search icon is located to the right of the tabs. The main content area displays a list of two closed tickets. Each ticket entry includes a ticket ID (e.g., #292008), a redacted subject line, and the text "Default Contact". Below each ticket ID is the submission information: "Submitted 12:26 AM - 3/5/2020".

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.

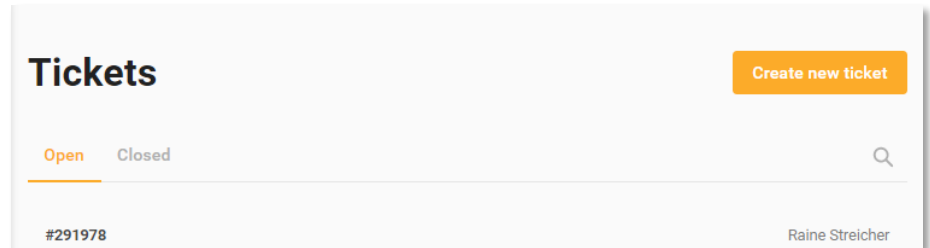
The screenshot shows the details for a specific ticket, "Ticket #291950". The main heading is "Ticket #291950". Below this is a white box containing the ticket title "Password expired, can't change password". Underneath the title are the submission and closure dates: "Submitted 10:51 AM - 3/4/2020" and "Closed 11:32 AM - 3/4/2020". To the right of these dates is the text "Status: Closed". Below the white box is a list of notes and attachments. The first two notes are from "DK Drea Kisting" and are dated "4 hours ago". Each note contains the text: "Tried to find someone to change his pw, no one available. Tried to login to RD to change it, no luck. Logged into N-able, was able to reset. He's good to go." The third item is an attachment labeled "Attachment" with a paperclip icon, dated "4 hours ago". The attachment name is "Password expired can't change password.eml".



## LOOK UP A TICKET

To look up a ticket:

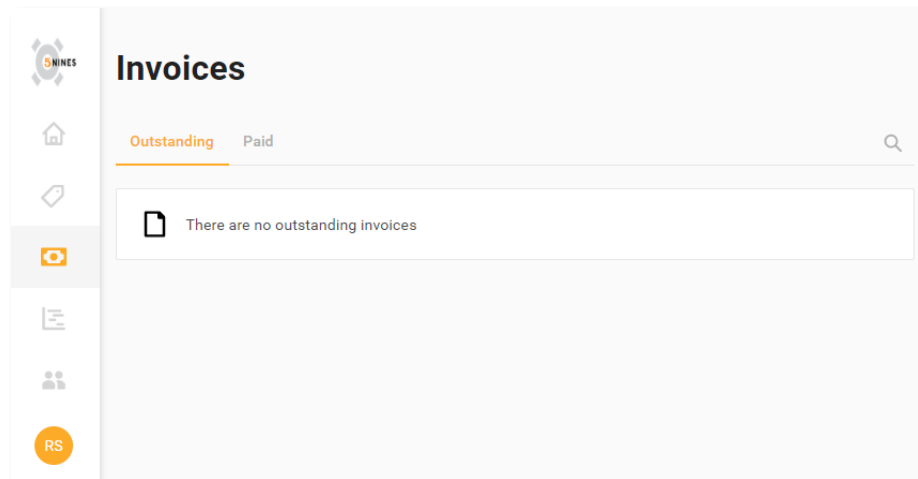
1. Select either the **Open** or **Closed** tab, then click the **magnifying glass** icon.



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

## INVOICES

The Invoices screen is where you view and pay invoices. To access this screen, click the Invoices icon in the left navigation or select the Make a payment tile on the Home screen. If you do not see the Invoices screen, contact your administrator to update your permissions.



## OUTSTANDING INVOICES TAB

The Outstanding tab displays invoices that need to be paid. Each list item shows the payment due date, invoice number, and amount.



## Invoices

Outstanding Paid



**Due May 8, 2019**  
Invoice #2526

**\$20.00**

**Due May 8, 2019**  
Invoice #2528

**\$100.00**

Select an invoice to view or pay the invoice. To download a PDF copy of the invoice, click the View invoice link.

**Due May 8, 2019**  
Invoice #2526

**\$20.00**  
[View invoice](#)

### Payment Option

Pay \$20.00 with PayPal

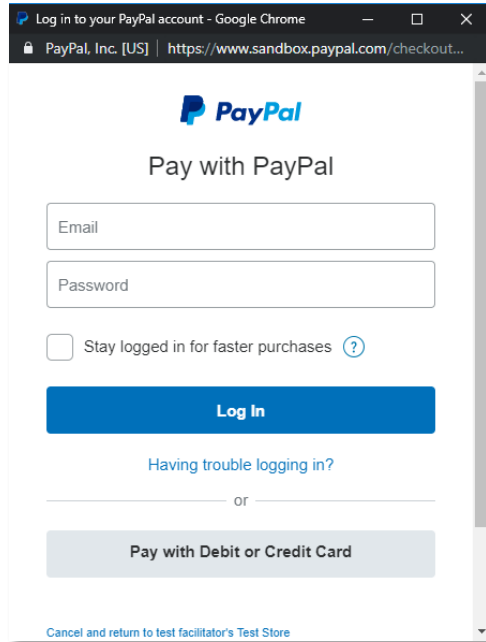


### PAY WITH PAYPAL

To pay an invoice with PayPal®:

1. Click an invoice on the Outstanding Invoices tab.
2. Click the **PayPal** button. The PayPal login opens in a new window.
3. Log in to your PayPal account.



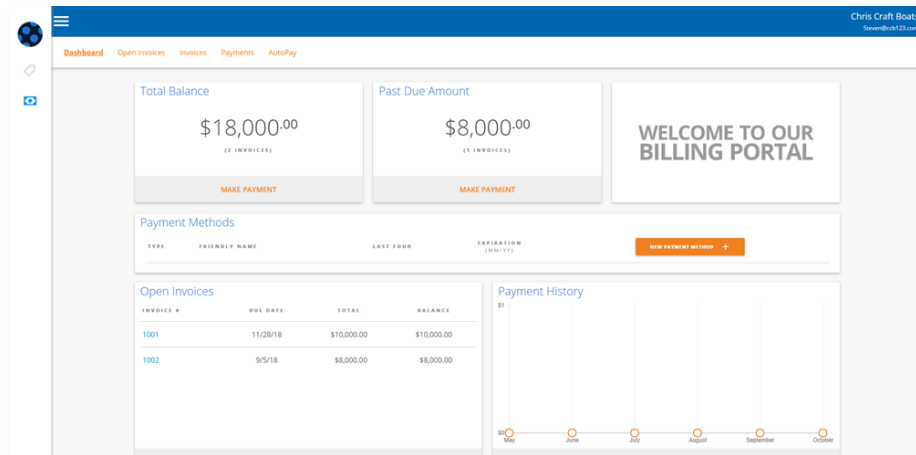


4. Select your payment method, then click **Pay Now**.

#### PAY WITH CONNECTBOOSTER

To pay an invoice with ConnectBooster:

1. Select an invoice on the Outstanding invoices tab.
2. Click the **ConnectBooster** button.
3. Log in to your ConnectBooster account.

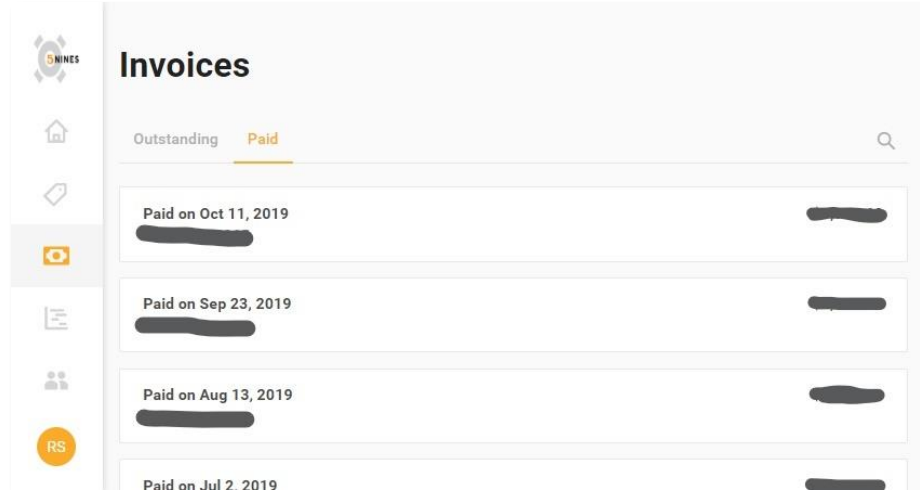


For help with ConnectBooster, send an email [support@connectbooster.com](mailto:support@connectbooster.com).



## PAID INVOICES TAB

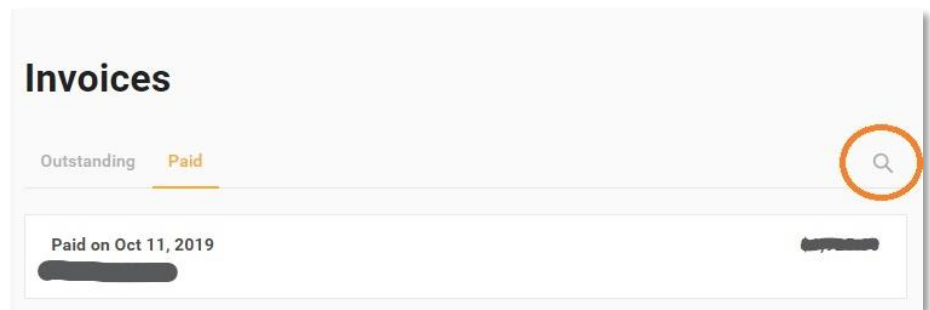
The Paid tab displays invoices that have been paid. Each list item shows the date of payment, invoice number, and amount. Select an invoice to view.



## LOOK UP AN INVOICE

To look up an invoice:

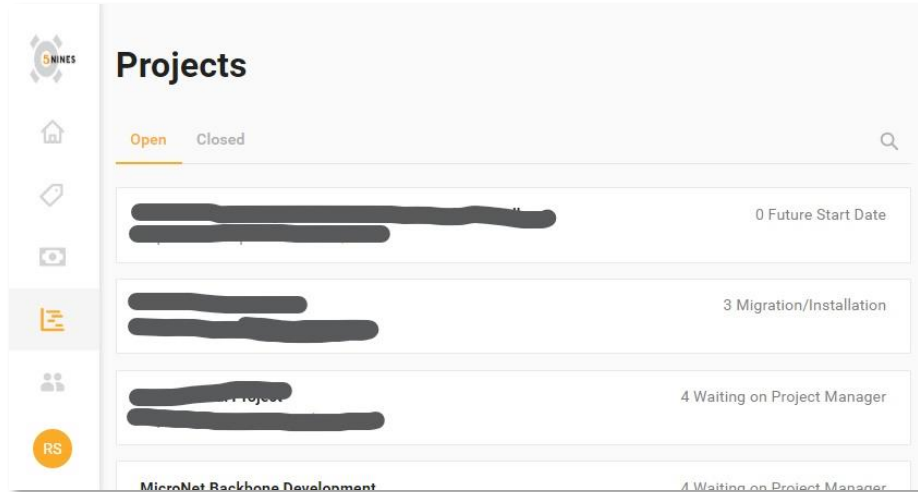
1. Select either the **Outstanding** or the **Paid** tab.
2. Click the **magnifying glass** icon.



3. Enter the invoice number into the search field, then press the **[Enter]** key.

## PROJECTS

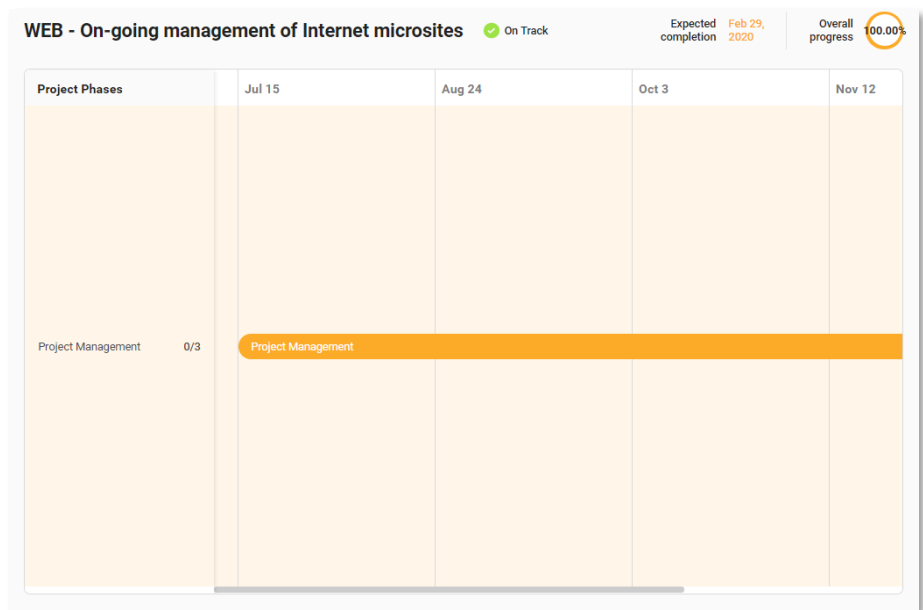
The Projects screen is where you can check the status of ongoing projects and view project tickets. To access this screen, click the Projects icon in the left navigation or select the View a project tile on the Home screen. If you do not see the Projects screen, contact your administrator to update your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



### 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.

### Project Management

Expected completion: **Jan 30, 2020**

Completed: **0/3**

- On-going management of Internet microsities
- General Residential Microsite Maintenance
- Subscription Billing Updates


**Close**

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

### On-going management of Internet microsities

Submitted 12:04 PM - 7/1/2019 Status: **On Hold**

Contact **Todd Streicher** Technician: Unassigned

Write a message   **Send**

## LOOK UP A PROJECT

To look up a project:

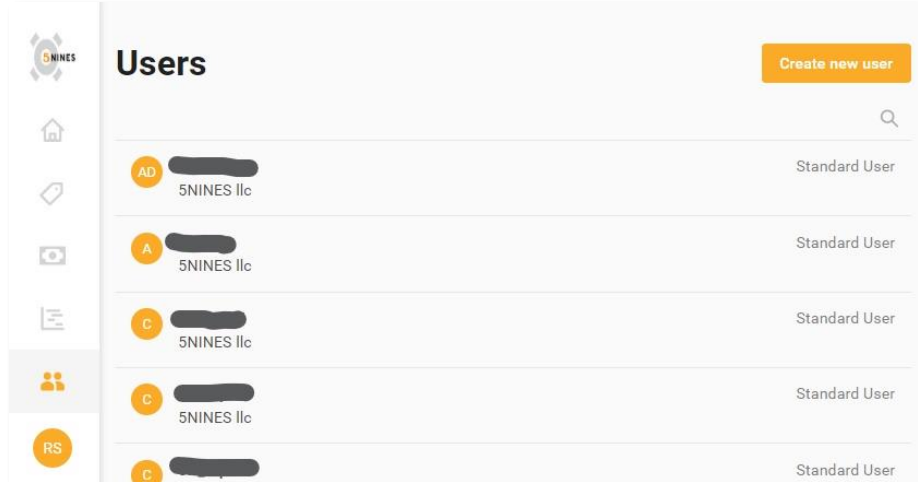
1. Select either the **Open** or **Closed** tab.
2. Click the **magnifying glass** icon.

Enter a keyword or phrase, then press the **[Enter]** key.



## USER MANAGEMENT

The Users screen allows you to create new users and change user permission settings. To access this screen, click the User Management icon in the left navigation or select the Manage user tile on the Home screen. If you require admin access and cannot see the User Management section, please contact us at [support@5nines.com](mailto:support@5nines.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. You can only assign one role to each user.

**Tip:** If a user cannot access a particular feature of the Portal (e.g., Projects), check their permissions. Be sure to assign them a role that can access that feature.

	Submit a ticket	Look up a ticket	Make a payment	View a project	Manage a user
Full admin	X	X	X	X	X
Ticket Manager	X	X		X	
Billing Admin	X	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. Please note that the Customer Portal password options in Manage apply to the legacy Customer Portal.

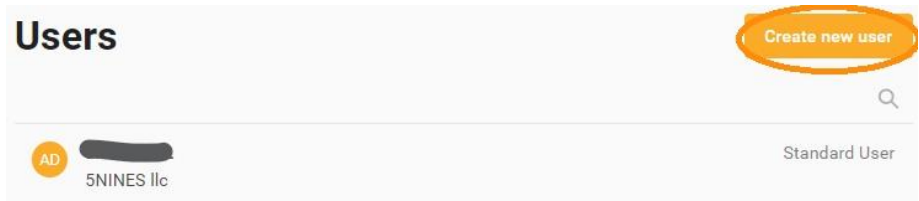
### CREATE A NEW USER

User accounts must be created with the user's Customer Portal login email address. If the Google™ or Microsoft sign-in options are enabled, create the account with the user's Google or Microsoft email address. If the Generic Login option is enabled, create the account with the user's ConnectWise single sign-on (SSO) email address. For more information on Customer Portal sign-in options, refer to Configure Sign-in Options.

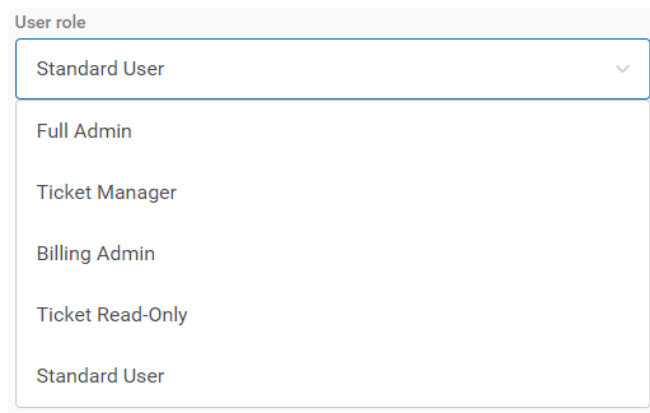
At this time, users are not automatically notified after their account is created; you must contact the user after you create their account. Be sure to provide the email address you used to create their user account and a link to your custom portal URL. If the user must sign up for ConnectWise SSO, they can do so by selecting Sign up from the Customer Portal login screen.

To create a new user:

1. 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. This email address is used to sign in to the Customer Portal.
4. Select the type of phone number, then enter the user's phone number.
5. Select a role for the user.





6. Click **Save**.

**Note:** After a user is created, they cannot be removed and only their permissions can be edited. If you need a user removed, please email [support@5nines.com](mailto:support@5nines.com) and we can remove users for you

### CHANGE A USER'S PERMISSION

To change a user's permissions:

1. Select the user from the user list.
2. Select the desired permission, then click **Save**.

### Permission Role

Change the permission role for:

allusers DL

- 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**