



NEW CLIENT PORTAL A GUIDE

CATS Technologies New Client Portal Is Here... Learn the In's and Outs to Using It



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1	GETTING	TO KNOW	THE PORTAI	

- 2..... CREATING AN ACCOUNT
- 4..... SIGN IN
- 5..... SUBMITTING A SUPPORT TICKET
- 6..... VIEW & EDIT TICKETS
- 7..... LOG OUT

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CLIENT PORTAL



You have the ability to...

- Create Tickets
- View ticket status
- Edit Ticket content
- Chat with our techs
- View past tickets

Explore our online portal through the client dashboard on our website, or access it directly





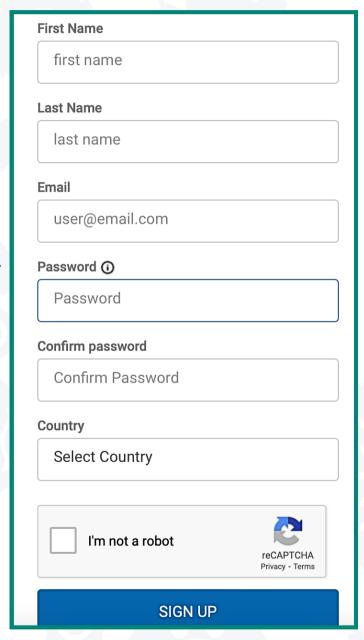
CURRENT CLIENT SIGN UP:

- 1. Visit Portal
- 2. Click Sign up button
- 3. Follow Instructions to create a password

***Be sure to enter all contact information that is currently recorded in ConnectWise Manage.

Receiving a "Request Permission to the Portal" Message? <u>Follow steps for New Client Sign Up</u>

4. Complete Sign up



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Please Note: This process is only for users who currently have their contact information recorded in ConnectWise Manage.



NEW CLIENT SIGN UP:

1 Compose and send an email to

Support@CATSTechnology.com

Subject: "Portal"

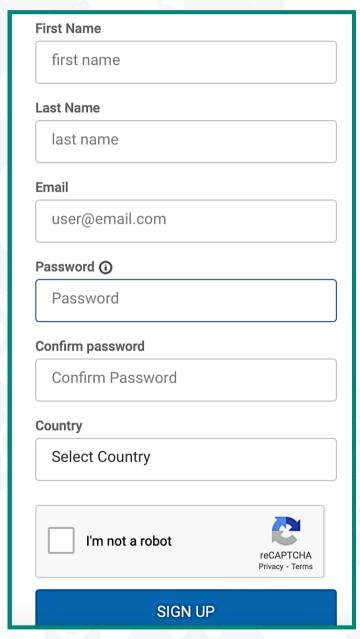
Body: "Test"

***Use the email address you

intend to use for the portal

login

- 2. Visit Portal
- 3. Click Sign up button
- Follow the instructions and complete sign up
- 6. Confirm with email





Please Note: This process is for users who do **NOT** currently have their contact information recorded in ConnectWise Manage.



SIGN IN: MICROSOFT

***Only applicable if Email being used is the same being used for client portal

- 1. Visit Portal
- 2. Click Sign in with Microsoft information

SIGN IN: GOOGLE



***Only applicable if Email being used is the same being used for client portal

- 1. Visit Portal
- 2. Click Sign in with Google information



***Feel free to reach out if you have any questions or require further assistance. We're here to help streamline the onboarding experience for your convenience.



SUBMIT A TICKET



- On Homepage or ticket tab select "Submit a Ticket"
- Select a category and service that best fits the issue from the dropdown menu

Email Support

Permission Requests

Credential/Password Issues

General Support

- 3. Enter appropriate contact information, best method of contact and issue information
- 4. Click Submit

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VIEW/EDIT TICKETS



- 1. Go to ticket tab located on the left sidebar
- Scroll and click to view all open and closed tickets
- Look Up a ticket: Search by ticket number or filter by ticket summary.
- 4. Click Submit

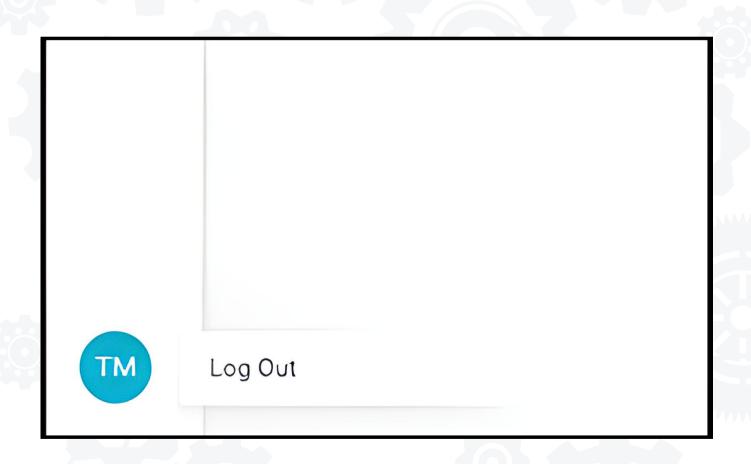
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LOG OUT

To log out, click on your initials in the bottom left-hand corner of the screen and select Log Out.



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