



NEW CLIENT PORTAL

A GUIDE

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

- 1..... GETTING TO KNOW THE PORTAL
- 2..... CREATING AN ACCOUNT
- 4..... SIGN IN
- 5..... SUBMITTING A SUPPORT TICKET
- 6..... VIEW & EDIT TICKETS
- 7..... LOG OUT



CLIENT PORTAL



You have the ability to...

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

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

link: catstechnology.myportallogin.com.

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? [Follow steps for New Client Sign Up](#)

4. Complete Sign up

First Name

Last Name


Email

Password ⓘ

Confirm password

Country

I'm not a robot


reCAPTCHA
Privacy - Terms

SIGN UP

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

First Name


Last Name

Email

Password ⓘ

Confirm password

Country

I'm not a robot 
reCAPTCHA
Privacy - Terms

SIGN UP

3 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.
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.
2. Click Sign in with Google information

4 ***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



1. On Homepage or ticket tab select "Submit a Ticket"
2. 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
2. Scroll and click to view all open and closed tickets
3. **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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