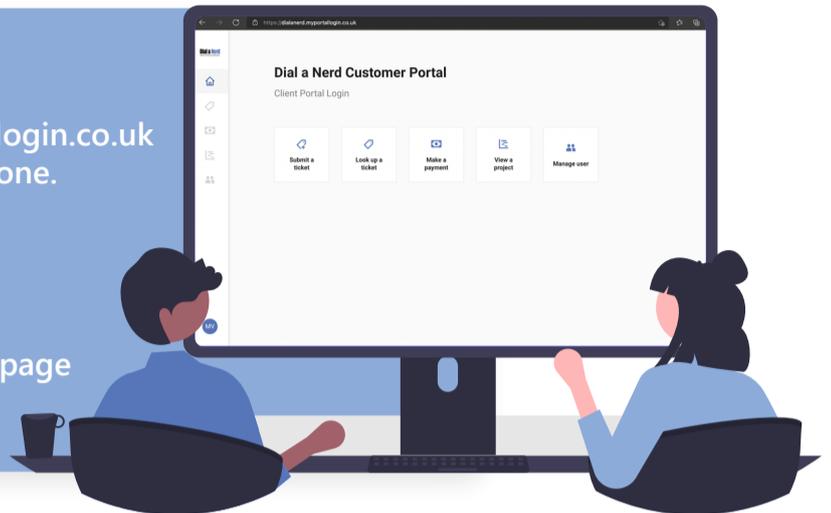


HOW TO USE THE DIAL A NERD CUSTOMER PORTAL

This guide walks a user through logging in, submitting a help ticket, viewing invoices, viewing projects, and managing another contact's access role in the Customer Portal. The audience of this guide is intended to have administrative access to the portal.

Log in to the Customer Portal

- 1 Navigate to <https://dialanerd.myportallogin.co.uk> from your computer or your mobile phone.
- 2 Click Microsoft, Google, SSO to sign in.
- 3 The Customer Portal Home page loads. Depending on your level of access, the page displays a variety of options.



Navigate the Customer Portal



Submit a ticket

Service Tickets

Submit a ticket: Click to create a new service ticket. After you select this option, you are presented with different ticket categories. Select the category of ticket you would like to submit for yourself or on behalf of a colleague.



Look up a ticket

Look Up a ticket: Click to review all open and closed tickets in the Customer Portal. Search by ticket number or filter by ticket summary. If you are an admin or a ticket manager, you can see all the tickets for your company.



Make a payment

Invoices

- Make a payment: Click to view all invoices that are ready to be paid.
- Print or save a PDF copy of your invoice right from your browser.
- View paid invoices.



View a project

Projects

- View a project: Click to view Gantt charts for current projects.
- Click on the project phases to view project tickets, request more details, or add a comment.
- Track phases and milestones as they progress.



Manage user

Contact Management

- Manage user: Click to view all users who have access to the portal.
- Set roles for other users in your company. Select from Full Admin, Ticket Manager, Billing Admin, Standard User, Ticket Read-Only, and No Access. A full description of each role is available within the portal.
- Add a new contact and set their role. You no longer need to request a new portal user; you can create one for your company.

Log Out

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

