



SUPPORT PORTAL USER CREATION

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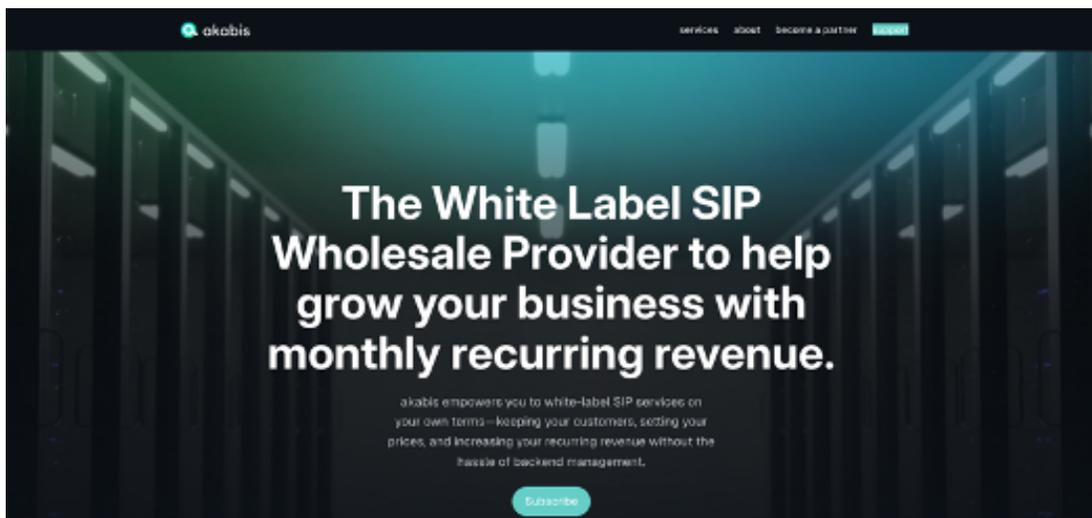


Creating a New User Account in Halo

This guide will help you create an account and log in to your Portal

Step 1: Access the Portal

Go to www.akabis.com and click on the Customer Support button in the top right



You will then be taken to the Customer Portal Page



Step 2: Start the Registration Process

Click the 'Create New User Account' link.



Please log in to your account

Remember me

[Create New User Account](#)

[Forgotten Password?](#)

[Log in to the Agent Application](#)





Step 3: Enter Your Details

Provide the following information:

Email Address

First Name

Last Name/Surname



Create New User Account

To create a new HaloPSA user, please enter the details below.

Step 4: Submit Your Information

Click 'Submit'. An email will be sent to the address you provided.



Create New User Account

Please check your email. Instructions regarding creating a new user have been sent to you

[Click here to return to the sign-in screen.](#)



Step 5: Verify Your Email

Open the email you received and click the verification link. This will redirect you to the Customer Portal.

Step 6: Set Your Password

Your email will already be populated in the login field. Choose a secure password for your account and click 'Submit'.

Step 7: Login to Your Account

Enter your email address and password, then click 'Log In'.

A verification code will be sent to the email you provided, enter the code in and click Submit

 joetester20@outlook.com

A verification code has been sent to
jo*****@outlook.com.

Please enter this code below.

 Verification Code

Submit

[Back](#)



Step 8: Set up Two Factor Authentication

The screenshot shows the 'Account Security' page for a Microsoft account. The user's email is 'jeter@akabis.com'. The page is titled 'Authenticator App' and provides instructions for setting up two-factor authentication. The instructions are as follows:

1. Download a two-factor authenticator app like Microsoft's Authenticator for [Windows Phone, Android](#) and [iOS](#) or Google's Authenticator for [Android](#) and [iOS](#).
2. Scan the QR Code or enter the authenticator app's phone number to set up your two-factor authentication.
3. Once you have scanned the QR code or input the phone number, your two-factor authenticator app will provide you with a unique code. Enter the code in the confirmation box below.

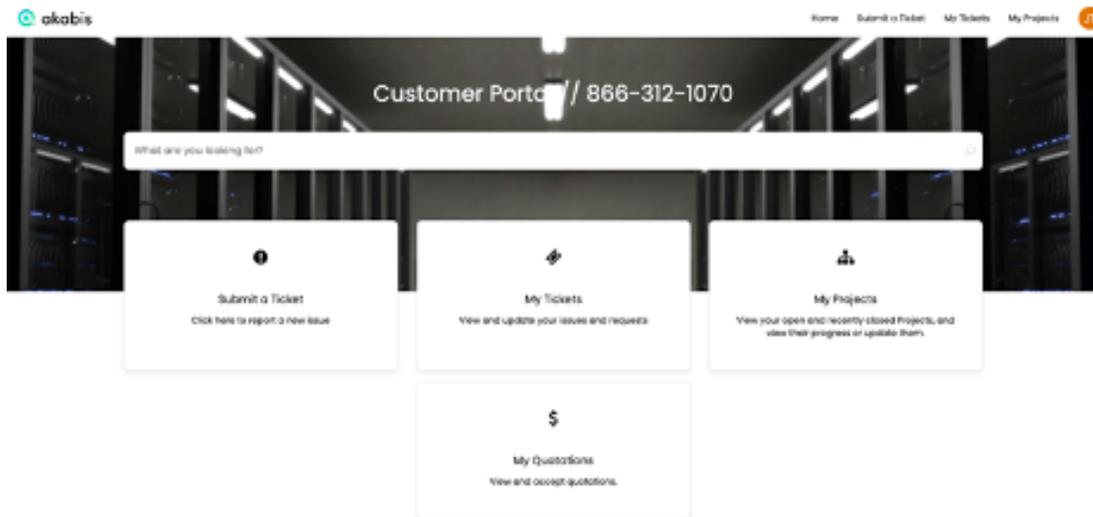
Below the instructions, there is a 'Verification Code' input field containing the number '5'. A red 'Verify' button is located at the bottom of the page.



Customer Portal Navigation

Overview

Once you are logged into the Customer Portal and set up Two Factor Authentication, you will see the main dashboard screen. From here, you can access a variety of options.



Available Options

On the main dashboard, you have multiple options to choose from:

Submit a Ticket: Create a new support request.

My Tickets: View and manage your existing tickets.

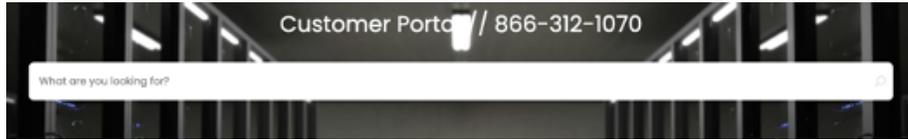
My Projects: Access and track your project details.

My Quotations: Review your quotations.

Search Functionality



You can also search for specific items, such as tickets or projects from the past.



The search functionality includes filter options to help you narrow down your results and find exactly what you need.



Creating a New Ticket in the Portal

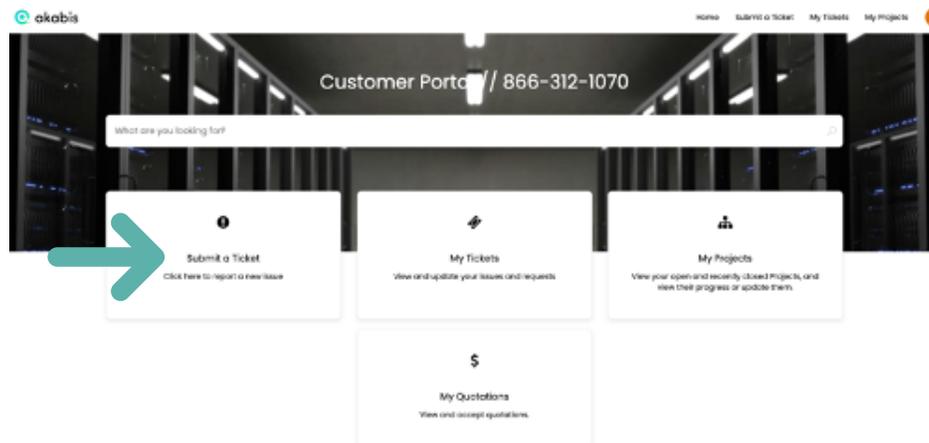
This guide will help you create a New Ticket within the Portal

Step 1: Access the Portal

Log in to the customer portal.

Step 2: Navigate to the Ticket Submission Page

Click the 'Submit a Ticket' button to begin the process.





Step 3: Provide a Summary

New Ticket Page

New Ticket
Please complete the following form to submit a new Ticket. * denotes a mandatory field

Summary *

Details *
Please provide a detailed description and include screenshots where possible.

Rich text editor toolbar: Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Link, Unlink, Image, Video, Table, Table of Contents, Source, Preview, Print, Full Screen, Help.

Impact *

Urgency *

Asset
Please select the relevant device below.

Asset Tag	Asset Type	Site	Key Field	Key Field 2	Key Field 3
<input type="text"/>					

Enter a brief and clear summary of the issue in the 'Summary' field.

Step 4: Detail the Issue

Provide a comprehensive description of the issue in the 'Details' box. Include screenshots or files if relevant.

Step 5: Specify the Impact

Select the appropriate option in the 'Impact' dropdown (e.g., single user, multiple users, or company wide).

Step 6: Indicate Urgency

Choose the urgency level in the 'Urgency' dropdown that best reflects the situation.

Step 7: Link Relevant Assets

If applicable, include the asset tag (device name) or company asset information (e.g., server, switch, ISP).

Step 8: Review Your Information

Ensure all fields are filled out accurately before proceeding.



Step 9: Submit the Ticket

Scroll down and click 'Submit'. Your ticket will be sent to the akabis Support Team.

Step 10: Confirmation

You will be redirected to the Ticket Flow page where you can track your submission.

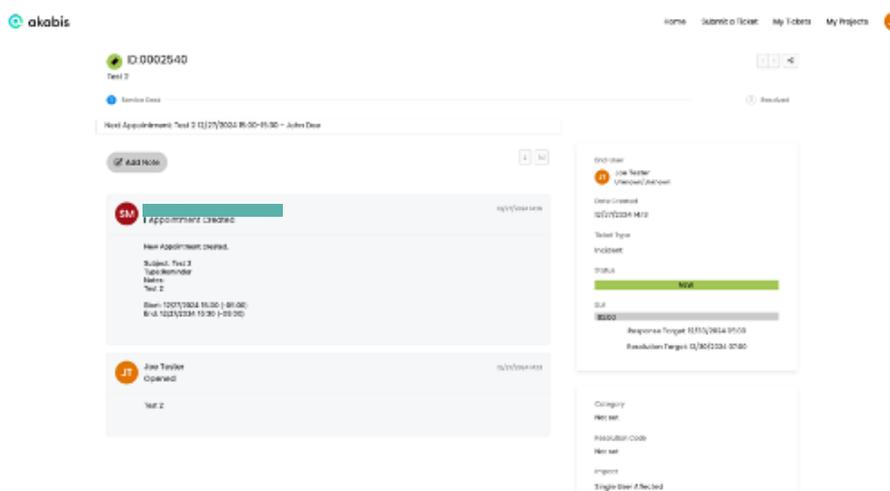


Tracking Your Ticket in the Portal

This guide will help you navigate and understand the Ticket Flow Page in the Akabis Customer Portal.

Step 1: Understanding the Ticket Flow Steps

Ticket view.



Step 2: Viewing and Adding Notes to the Ticket

On the left-hand side of the page, you can see your Ticket ID. You also have the option to Add a Note for the akabis Support Team to review.



Step 3: Checking the Ticket Status

On the right-hand side, you can track the Status of your ticket and view the date it was submitted.

End-User
Joe Tester
Unknown/Unknown

Date Created
12/27/2024 14:13

Ticket Type
Incident

Status
NEW

SLA
02:00

Response Target: 12/30/2024 05:00
Resolution Target: 12/30/2024 07:00

Category
Not set

Resolution Code
Not set

Impact
Single User Affected

Urgency
Medium

Assets

Source
Web

Step 4: Monitoring Technician Progress

As a akabis technician begins working on your ticket, you can follow the steps they've taken to resolve your issue.

Step 5: Ticket Closure Notification

Once your issue is resolved, the Status of your ticket will update to CLOSED.

Step 6: Receiving Email Updates

You will receive an email notification when your ticket is closed. This email will include a final note from the technician detailing the resolution.

Step 7: Reopening a Ticket

If your issue persists after the ticket is closed, you can respond to the closure email to reopen your ticket for further assistance.



Step 8: Viewing Your Tickets

In the Customer Portal, navigate to the My Tickets section to view all of your tickets. You can filter tickets by Open or Closed status.

Step 9: Viewing All Tickets

To view both Open and Closed tickets simultaneously, adjust the filter to display All Tickets.