

Using the KPEnterprises Client Service Portal

Document Revision
2/19/2009

Table of Contents

Introduction.....	1
Logging in to the Client Service Portal.....	2
Creating Service Requests	3
What happens now that I have entered a service request?	4

Introduction

KPEnterprises uses a system called Autotask® to manage service requests and keep track of all the work performed for clients.

This document describes the KPEnterprises Client Service Portal, also referred to as the Client Access Portal. With the Client Service Portal, you can create service requests, set priorities, review work status, enter notes for us, and more.

Depending on your Security Access Level, you will also be able to access a secure, “View Only” way to see your projects, review work in progress, view percentage complete, see hours spent, and more.

Note:

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Logging in to the Client Service Portal

All of our work is performed based on Service Requests, so the first step is to log into the Client Service Portal and create one.

If the problem you are experiencing affects your ability to get to the Portal from your computer then you will need to enter the new Service Request from another machine in the office. If your entire office is unable to connect please call the Service Desk at 916-928-0888 and ask for Extension 2.

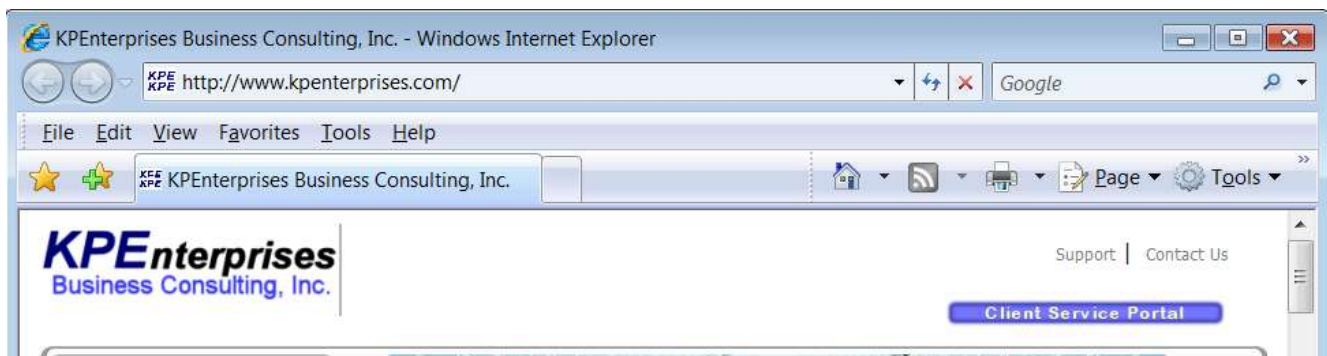
Logging In:

Once your login is created, you will receive an email with a link to our Client Service Portal. You can save this link in your Internet browser favorites, or even put it on your desktop.

If you don't have access to this link, you can open the port from the KPEnterprises web site.

Open Internet Explorer and navigate to **www.kpenterprises.com**. Once there, you will find a blue button labeled "Client Service Portal" in the upper right hand corner of every page on the site.

Simply click on this button to be taken to the Client Service Portal.



At this point you will be taken to the KPE Client Service Portal login page.

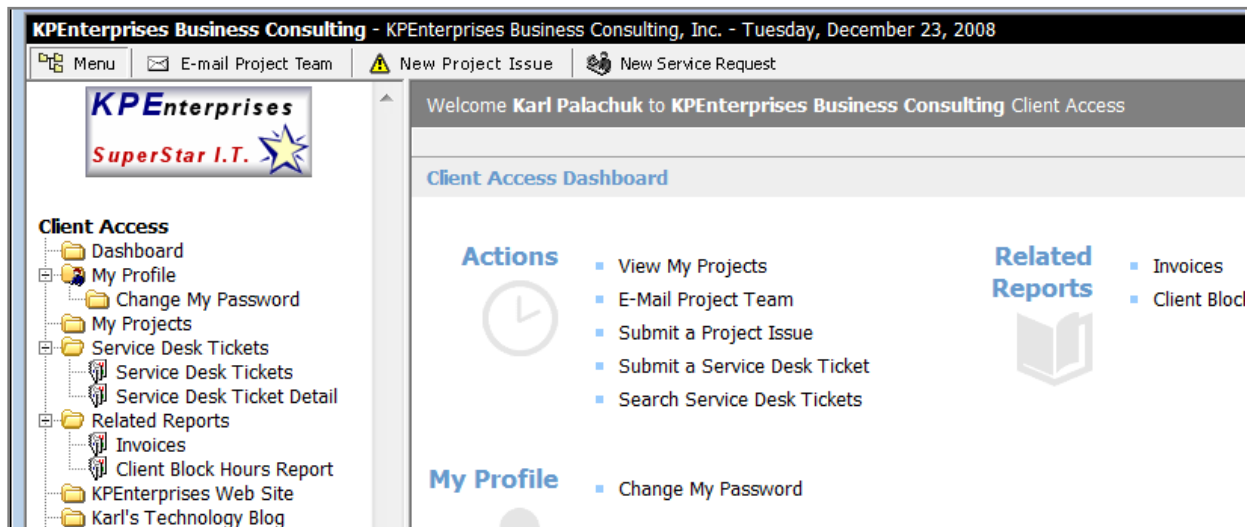
Enter the user name and password you received by email address and then press Enter.

<p>Client Access Portal for: KPEnterprises SuperStar I.T.</p> <p>To Login, please enter your username and password and press the login button at the right.</p>	<p>Username : kpalachuk</p> <p>Password : <input type="password"/></p> <p><input type="checkbox"/> Remember Me</p> <p><input type="button" value="Login"/></p> <p>If you have lost your password click here</p>
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If you do not know your password, or have forgotten it, you can have it emailed to you by clicking the link labeled “If you have lost your password click here.”

Note: If you are new to your company, or your company is new to KPEnterprises, you may not yet have an account set up. If this is the case, please contact your office’s technical lead or call KPEnterprises and we will get it set up for you.

Once you have entered your user name and password you will be directed to your main support page. This is the starting place for all Client Service Portal activities, including entering and monitoring service requests.



Creating Service Requests

At KPEnterprises, all work is performed against a Service Request. The best practice for getting help as quickly as possible is to start by entering a Service Request.

To create a Service Request, click on the New Service Request button. You can see this in the illustration above. Here’s the specific button you’re looking for:

You will enter three key pieces of information:

1. **Ticket Title** is a very brief caption for your Service Ticket. It should be a good, brief statement of the problem or request.
2. **Priority** represents the relative importance of a job.
3. The **Description** field should include all details about the problem, any helpful information you have, and any other information that will be helpful in solving the problem.



Please include any error messages that you may have come across.

Your Service Request will only be submitted when you click **Save and Close**.

When you have filled in all the information click Save and Close, you will be returned to the main support page.

Optionally, you can **Add an Attachment** to your service ticket in order to help us. This might be a screen shot, a letter from a third party, etc.

What happens now that I have entered a service request?

Our Service Team is paged immediately after a new Service Request is entered.

Once we have reviewed the request it will be prioritized and we will begin working on it as soon as possible.

The fastest way to get attention to a problem is to **enter a service request**. It is faster than a phone call!

Sometimes, people feel they'll get a faster response with a phone call or an email, but the first thing we always ask is, "Have you entered a service request?"

If you need urgent attention to an issue, you can mark it as critical, make a special note in the description, or call us immediately after you enter a service request.

But the fastest way to get attention to a problem is to **enter a service request**.

Administrators:

Please also review the KPEnterprises Client Service Portal Administrator's Guide for information on creating and managing users, running reports, and more.