Using the LMT Client Portal

LMT TECHNOLOGY SOLUTIONS

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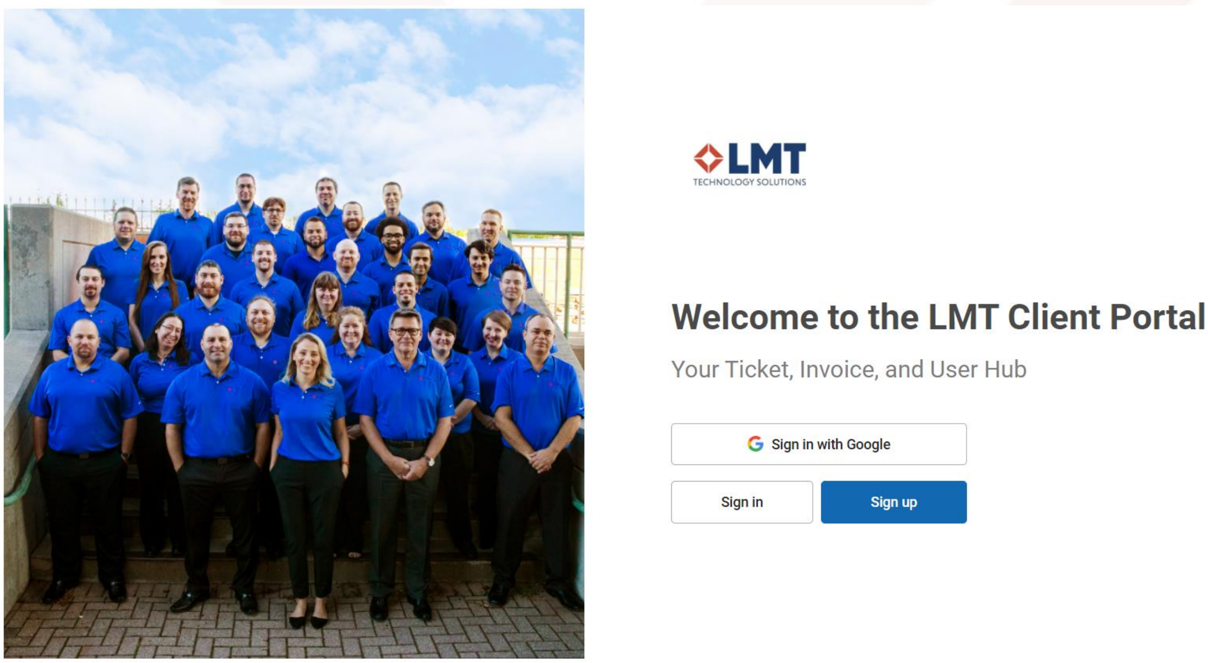
Introduction

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. You can also watch this short YouTube video for more information:
https://www.youtube.com/watch?v=csSJt0jNCv4&feature=youtu.be

Logging into the Client Portal for the First Time

1. Navigate to **https://lmttech.myportallogin.com/** from your computer or your mobile phone.



2. Click on the Sign Up button

   You will need to create a New Account using your work email that we have on file. If your email address is not in our system, it will not allow you to create an account.
   ** Only Microsoft and Gmail email addresses can be used*
   ** Password must be complex and a minimum of 9 characters*

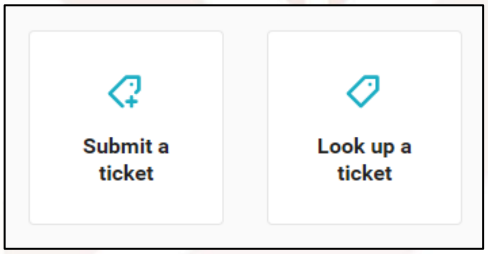
3. You will see a ConnectWise log in window, enter your email address again and then check your inbox to validate your email address. You may also be prompted to enter your Phone number and Zip code, if so, enter that information and click Continue. You will be taken to a ConnectWise screen, close out of that window and go back to **https://lmttech.myportallogin.com/** to log back in.

4. Click Sign in with your credentials.

PLEASE CONTINUE TO CALL THE LMT NOC AT (585) 784-7470 X 1 FOR ANY EMERGENCIES

Navigating the Client Portal

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. By selecting the correct category, the ticket will be routed to the appropriate channel for resolution of your issue.

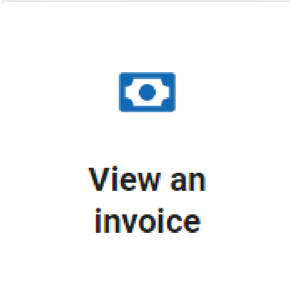
Service Ticket Categories

- **I Have a Problem** – for problems that don't fall into the other categories.
- **New Email User**
- **I Need a New Computer/Laptop**
- **Login Issues/Forgot Password**
- **I Need Access to View Assets and Configurations**
- **Common Issues** – for issues such as unable to connect remotely, cannot print, cannot scan, unable to access the internet, monitor display issues, computer will not turn on, poor computer performance, program crashed/unresponsive.

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. You can add notes to existing tickets and create new tickets on this page.

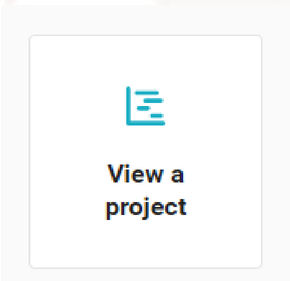
Invoices



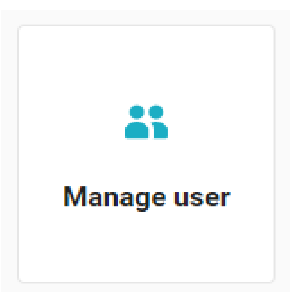
To View an Invoice

- Click on **View an Invoice** to view all invoices that are outstanding and paid.
- Print or save a PDF copy of your invoice right from your browser.
- *Coming in Q1 2021!!* Submit a payment for the invoice by selecting Pay with **ConnectBooster**.

Projects – NOT Currently Available, Coming later in 2021



User Management – for Admin Users Only



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	• Standard User
• Ticket Manager	• Ticket Read-Only
• Billing Admin	• No Access.

A full description of each role is available within the portal.

To Set Roles

- Click on the box next to the contact's name
- Click on the Pencil icon to change the permission role.
- Click Save.

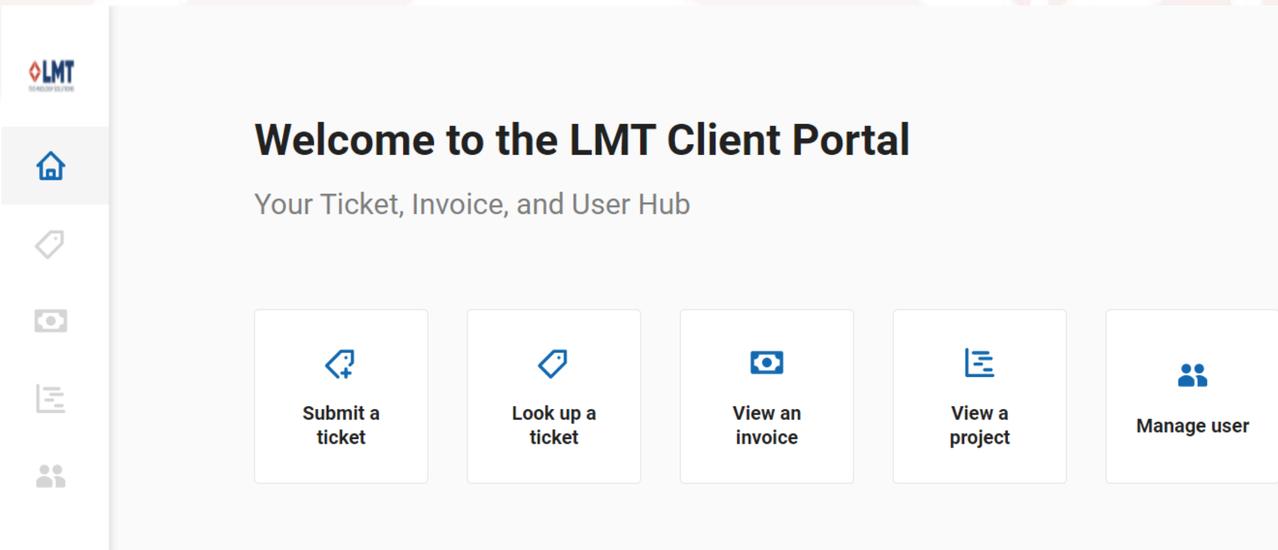
To Add a New Contact and set their role. Click on the + icon to Add a new contact.

User Permissions, Functionality, and Views

Full Admin

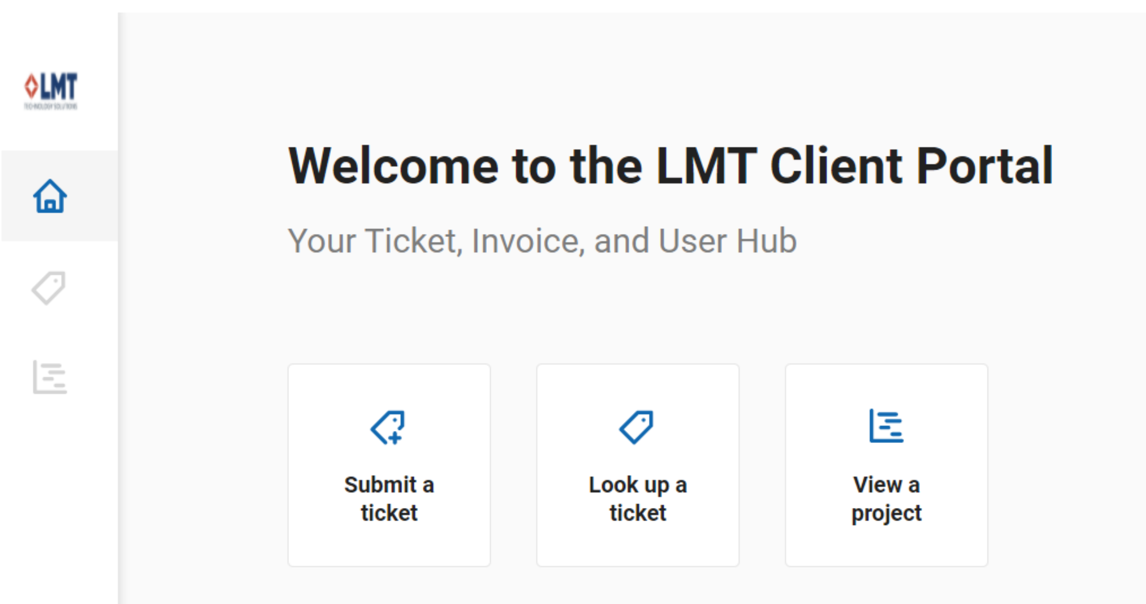
Full functionality for all features including:

- Add/Remove Users
- View All Tickets
- View and Pay Invoices
- Open Tickets



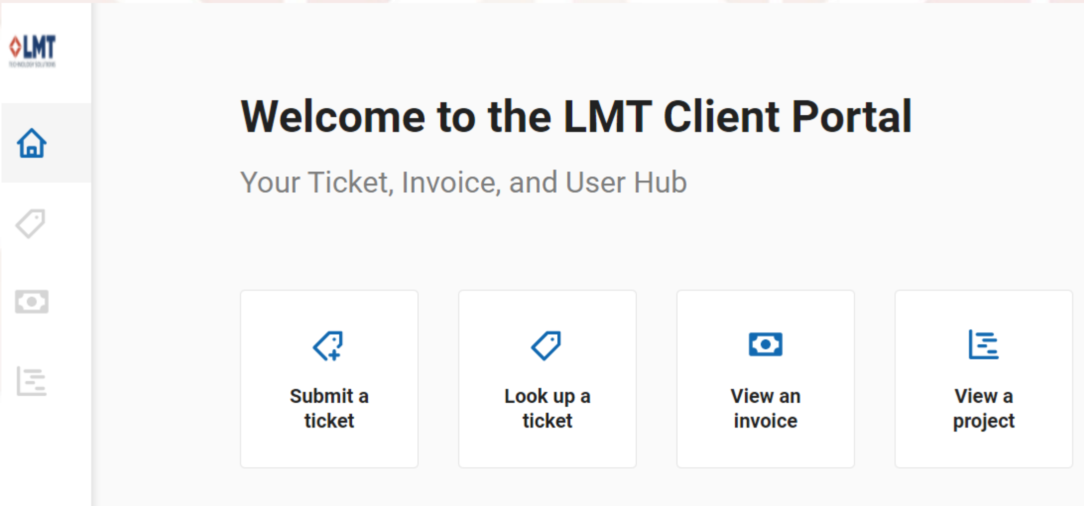
Ticket Manager

Can create and view tickets for other users and comment on existing tickets.



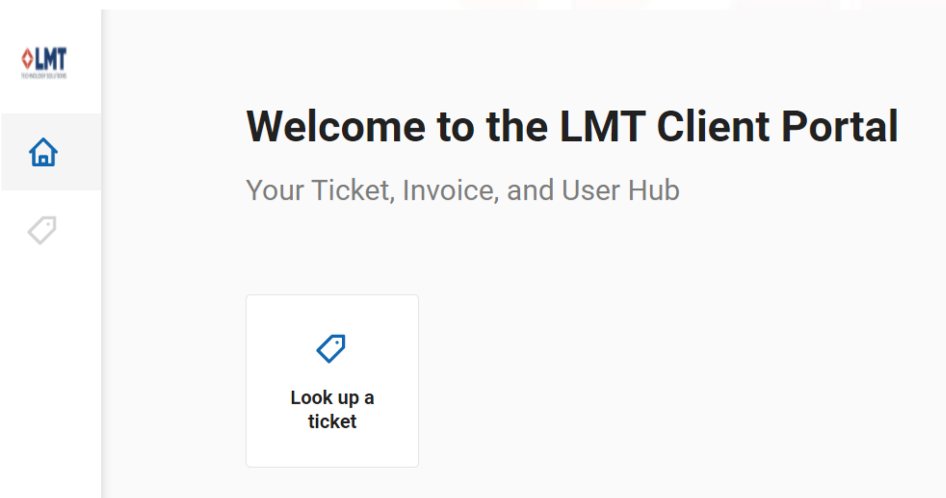
Billing Admin

Can pay invoices as well as submit their own tickets.



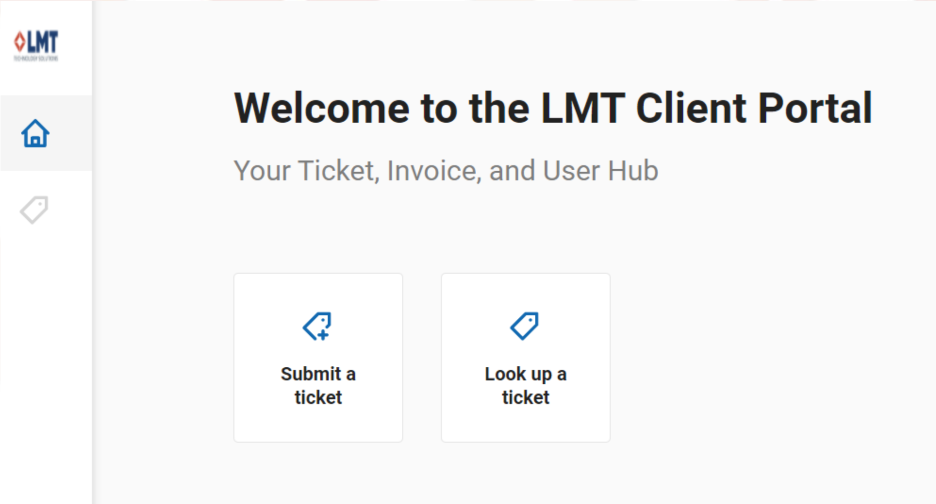
Ticket Read-Only

Can only read their own tickets but cannot create them.



Standard User

Can create their own tickets and comment on existing tickets.



Logging Out

To log out

1. Click on your initials in the bottom left-hand corner of the screen.
2. Select Log Out.

Logging In After Your First Log In

1. Click on the link to the Client Portal
2. Click the Sign In button.
3. Enter your credentials.

You're now logged in!

Contact Us

For any questions, assistance needed, or issues with the Client Portal, contact our:

Client Portal Team
ClientPortal@LMTnet.com
(585) 784-7470 **x200**