

SUPPORT PORTAL USER CREATION

DECEMBER 30, 2024

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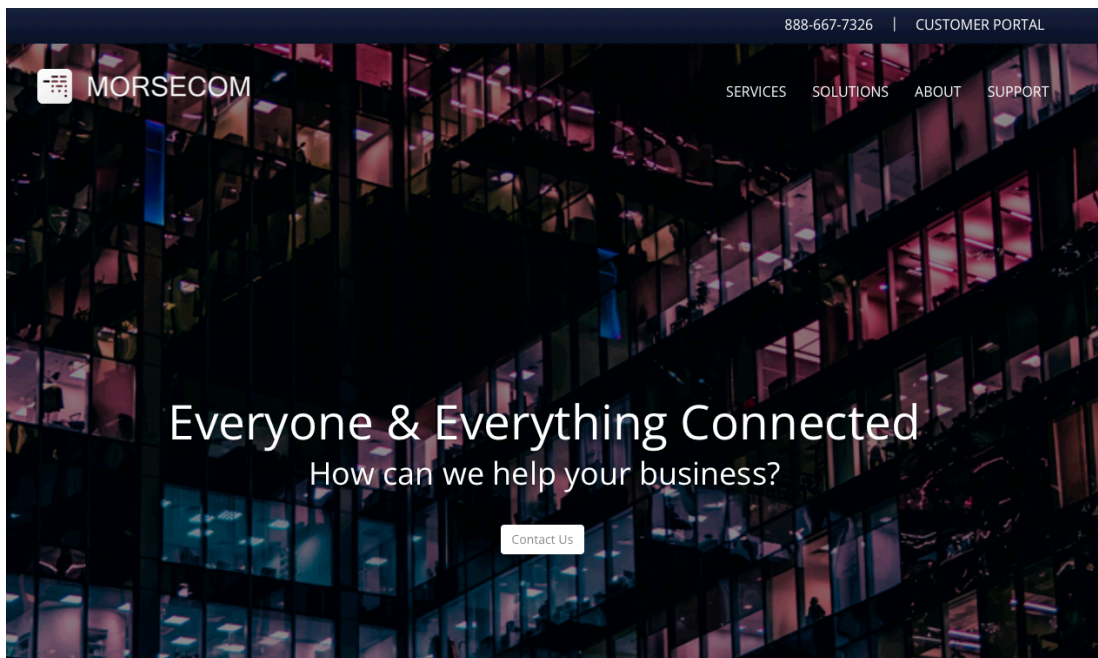
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Creating a New User Account in Halo

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

Step 1: Access the Portal

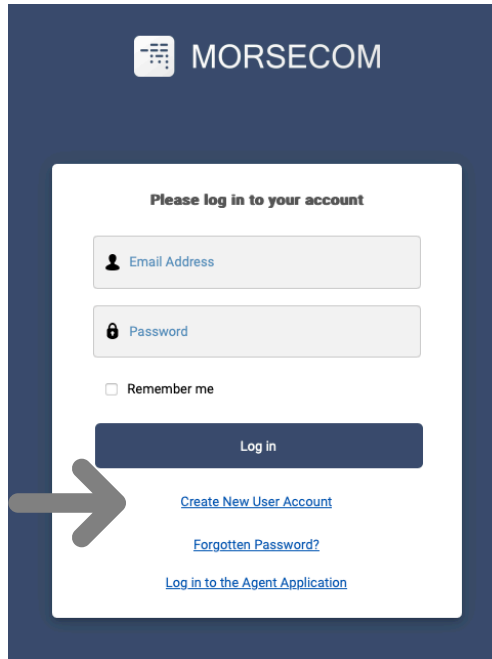
Go to www.morsecom.com and click on the Customer Portal link in the top right



You will then be taken to the Customer Portal Page

Step 2: Start the Registration Process

Click the 'Create New User Account' link.



The screenshot shows the MORSECOM login interface. At the top, the MORSECOM logo is displayed. Below it, the text "Please log in to your account" is centered. There are two input fields: "Email Address" and "Password". Below the password field is a checkbox labeled "Remember me". A dark blue "Log in" button is positioned below the checkbox. Below the button, there are three links: "Create New User Account", "Forgotten Password?", and "Log in to the Agent Application". A large grey arrow points to the "Create New User Account" link.

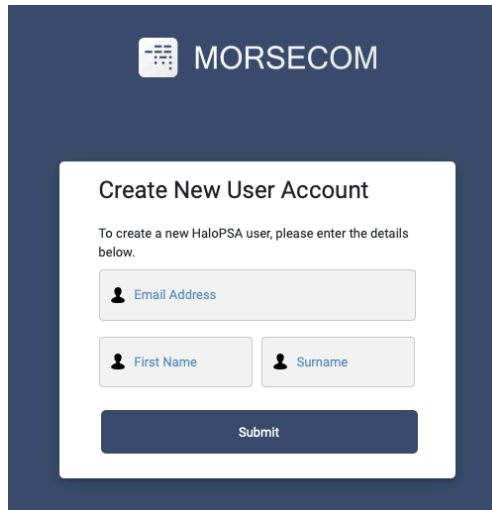
Step 3: Enter Your Details

Provide the following information:

Email Address

First Name

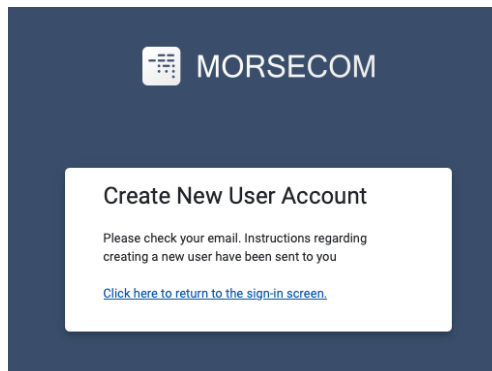
Last Name/Surname



The screenshot shows a dark blue background with the MORSECOM logo at the top. A white card in the center is titled "Create New User Account". Below the title, it says "To create a new HaloPSA user, please enter the details below." There are three input fields: "Email Address" (with a person icon), "First Name" (with a person icon), and "Surname" (with a person icon). A dark blue "Submit" button is at the bottom of the card.

Step 4: Submit Your Information

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



The screenshot shows a dark blue background with the MORSECOM logo at the top. A white card in the center is titled "Create New User Account". Below the title, it says "Please check your email. Instructions regarding creating a new user have been sent to you". At the bottom of the card, there is a blue link: "[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.

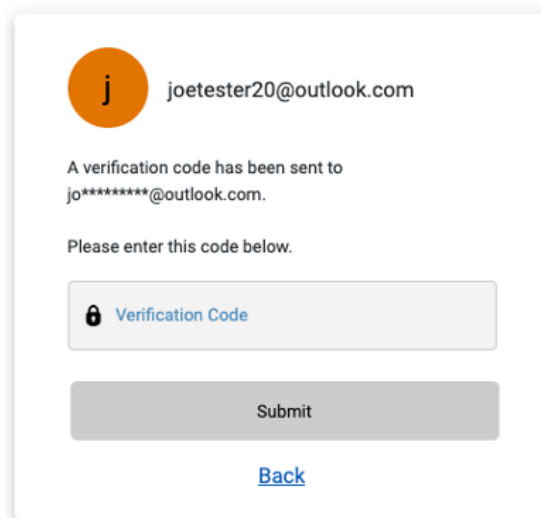
Step 6: Set Your Password

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



The screenshot shows a verification code entry screen. At the top left is a circular profile picture with the letter 'j' on an orange background. To its right is the email address 'joetester20@outlook.com'. Below this, a message states: 'A verification code has been sent to jo*****@outlook.com.' Underneath, it says 'Please enter this code below.' There is a text input field with a lock icon and the placeholder text 'Verification Code'. Below the input field is a grey 'Submit' button. At the bottom center is a blue 'Back' link.



Step 8: Set up Two Factor Authentication

The screenshot shows the 'Account Security' page for a Microsoft account. The user's email is 'jeter@22@outlook.com'. The page is titled 'Authenticator App' and provides instructions for setting up two-factor authentication. The instructions are as follows:

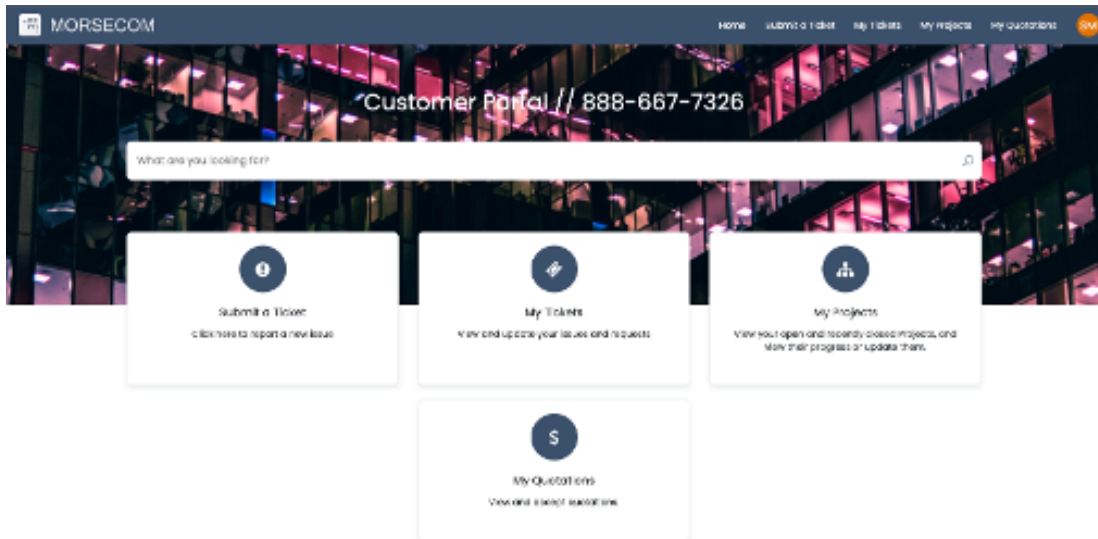
1. Download a two-factor authenticator app like Microsoft's Authenticator for [Windows Phone, Android](#) and [iOS](#) or Google's Authenticator for [Android](#) and [iOS](#).
2. Scan the QR Code or enter the authenticator app's space code.
3. Once you have scanned the QR code or input the space code, 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

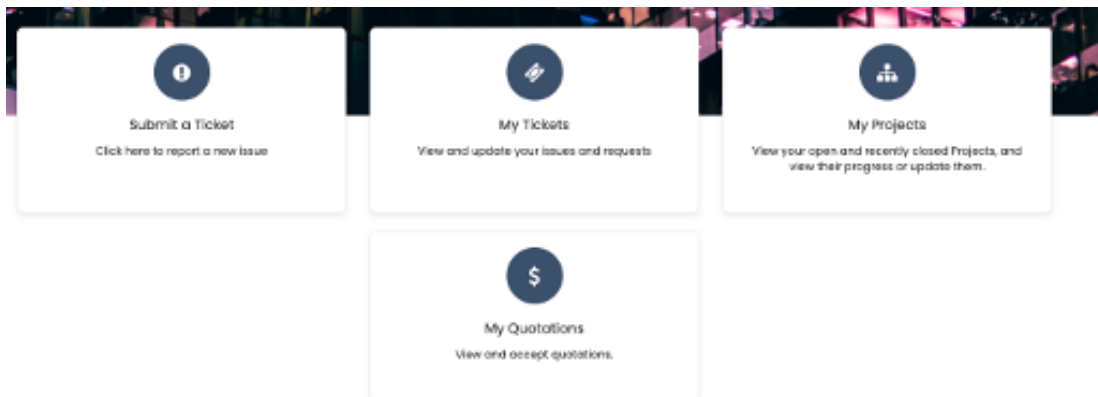
On the main dashboard, you have multiple options to choose from:

Submit a Ticket: Create a new support request.

My Tickets: View and manage your existing tickets.

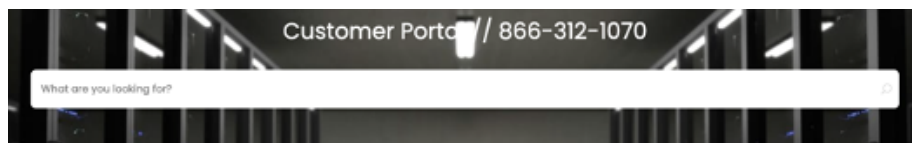
My Projects: Access and track your project details.

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

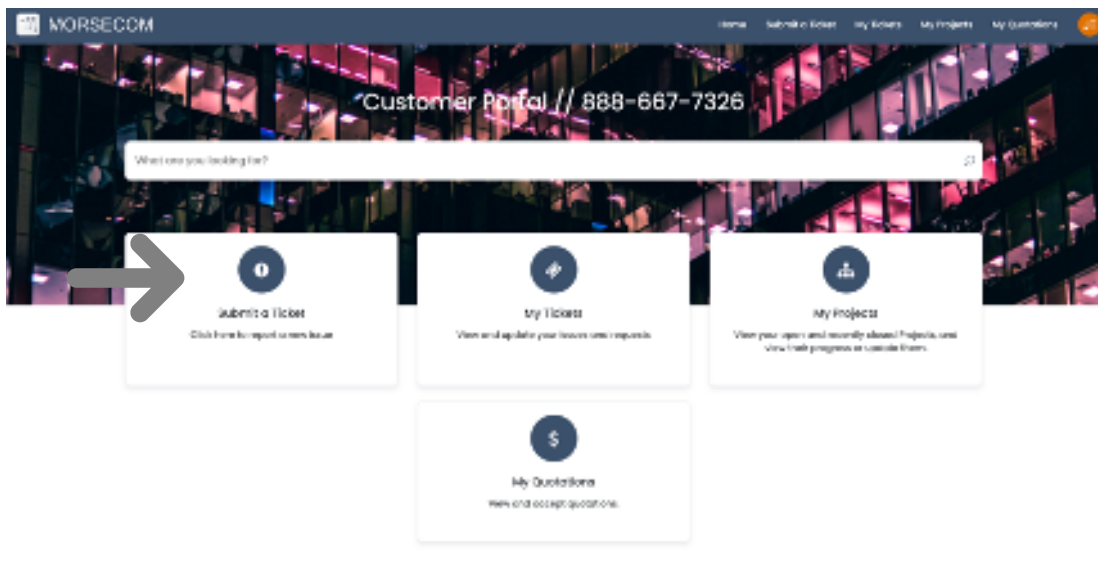
This guide will help you create a New Ticket within the Portal

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 with icons for bold, italic, underline, link, unlink, list, and image.

Rich text editor content area.

Impact *

Select...

Urgency *

Select...

Asset
Please select the relevant device below.

Asset Tag	Asset Type	Site	Key Field	Key Field 2	Key Field 3

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 MORSECOM Support Team.

Step 10: Confirmation

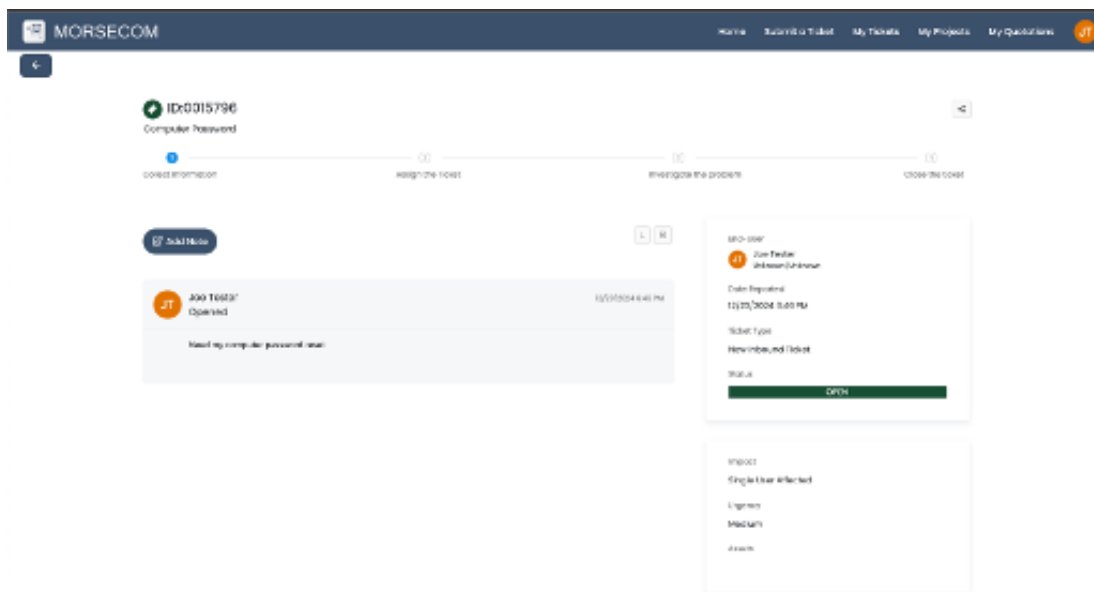
You will be redirected to the Ticket Flow page where you can track your submission.

Tracking Your Ticket in the Portal

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

Step 1: Understanding the Ticket Flow Steps

Ticket view.

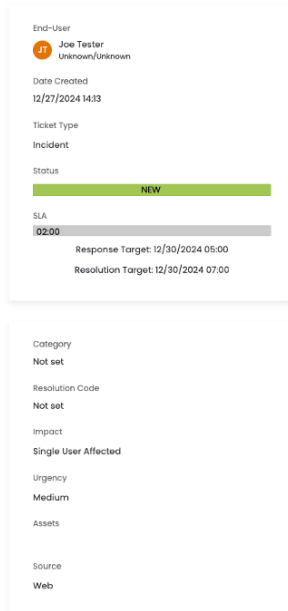


Step 2: Viewing and Adding Notes to the Ticket

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 MORSECOM 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 MORSECOM 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.