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My Account

Login System Instructions

Introduction

With Excalibur Technology's Client Login system, you will have access to your appointments, files, invoices, knowledge base, quotes, tasks, and tickets from wherever you want, so long as you have an internet connection and a computer. This system provides for faster and easier access to all the information that your company needs.

In addition to being convenient, Excalibur's Client Login system is also secure. All connections to the system are encrypted with industry-standard 128-bit SSL encryption. This means that all information passed between your computer and the server is encrypted and hidden from prying eyes. Additionally, all sensitive data (such as credit card numbers) is stored in an encrypted format on the server itself, providing another layer of protection.

One major advantage of this web-based login system is that you can work on your own timetable. You can view upcoming appointments, add tasks to your task list, or even print out quotes and invoices, all without calling Excalibur. You can also submit tickets at any time you want, even after office hours. Likewise, you can retrieve information at your convenience.

Getting Started

The Client Login page can be reached directly by navigating your web browser to **http://client.excaltech.com**/. You can also access it by going to the main Excalibur Technology homepage at http://www.excaltech.com/, and clicking on the "My Account" link.

Logging In

To log into the system, you will need a username and password. Each company and user should have a unique set of credentials. If you do not have a system login, please contact your Technology Consultant and request one. Once the Client Login page is loaded, you will see the following:

My Account Login

Note: This is not a login for webmail.

This section of our website is reserved for our clients. Access requires an account username and password. Please call your Technology Consultant to get your account set up today. When they setup your account, they will also provide instructions to you.

This section of our website allows you to open service tickets, check the status of your service tickets, check your appointment times and order products right online! Once you enter in a request, our staff is immediately notified that your request has been made. Using this system is one of the fastest and easiest ways to receive support from our company because our system will automatically route your request to the first person available that can solve your problem. If you prefer to phone in your request, we are always available and ready to take your call.

Please let us know what other tools you would like to see added to this section. Our goal is to make this section easy and friendly to use. Our commitment to you is to continue to provide the best products and services imaginable. If you would like a similar section for your website, please call our office and speak to one of our web developers.

Username: jrobinson@abcinc.com

Password: *************

Log-In

***** Access to this system is being logged. Your unique IP and browser information is being tracked. Unauthorized attempts to access this system will be fully prosecuted to the fullest extent of US and International law. *****

On this page, enter the login information provided to you by Excalibur, and click "Log In" to log into the Client system.

Start Page

Once you have successfully logged into the Excalibur Client Login system, you will be redirected to a start page, which you can see in figure 1.1.

Figure 1.1

The first thing you notice at the top of this page is your name, followed by your company name. To the right of that is a set of menu links:

Home: This link will take you back to this start page from anywhere else in the system.
Manage Users: This link will take you to the page where you can manage users for your company.
Log Out: This link logs you out of the Client Login system.

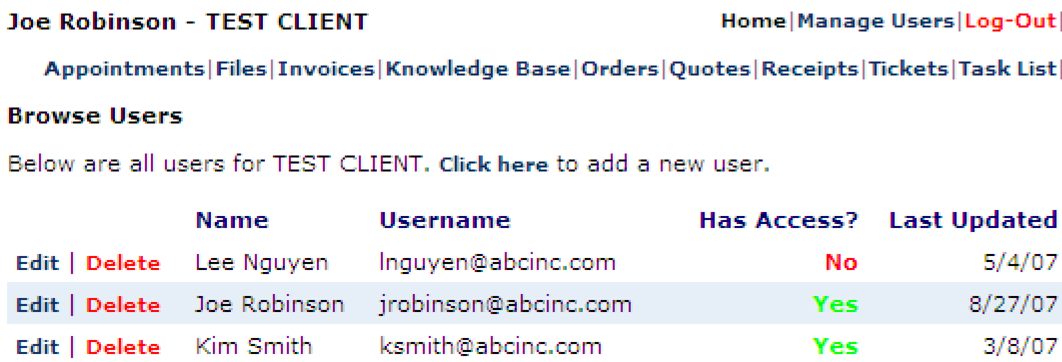
Below that is a menu that you can use to navigate the entire Client system, and in the middle of the page is a full representation of what is contained in the menu.

To start using a section of the Client system, just click on the link you'd like to see.

Manage Users

The Manage Users module allows you to view, edit, and add users.

Browse Users



Joe Robinson - TEST CLIENT Home|Manage Users|Log-Out|

Appointments|Files|Invoices|Knowledge Base|Orders|Quotes|Receipts|Tickets|Task List|

Browse Users

Below are all users for TEST CLIENT. **Click here** to add a new user.

	Name	Username	Has Access?	Last Updated
Edit | Delete	Lee Nguyen	lnguyen@abcinc.com	No	5/4/07
Edit | Delete	Joe Robinson	jrobinson@abcinc.com	Yes	8/27/07
Edit | Delete	Kim Smith	ksmith@abcinc.com	Yes	3/8/07

Figure 2.1

As shown in figure 2.1, the “Browse Users” page shows you a list of all active users in Excalibur’s Client Login system for your company. Each record lists the user’s full name, the user’s username, whether or not the user has access to the system, and the date that the user was last updated. Clicking on “Edit” next to each user will allow you to edit each user’s information and portal permissions. Clicking on “Delete” next to each user will delete the user from the system.

Add/Edit User

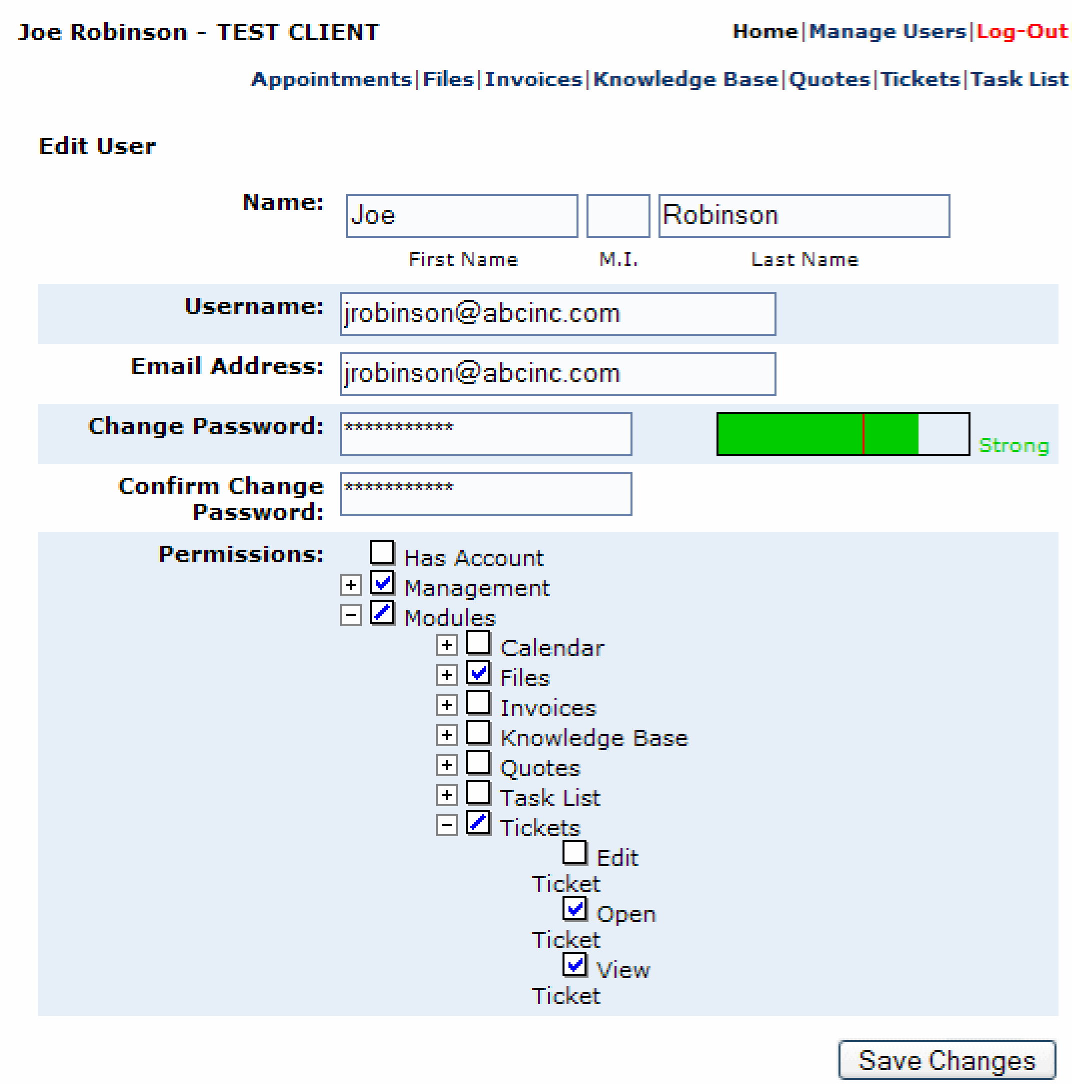


Figure 2.2

When you click on the "Edit" link or the "Add User" link, you will the screen pictured in Figure 2.2. If you are editing an existing user, everything but the password fields will be already filled in with whatever data corresponds to that user. If it is a new user, everything will be blank.

The first field is where you enter the user's name. After that, the username is the name that the user would use to log into the client portal. We recommend using an email address, as that will almost always be unique to each person (e.g.: even if there are two Robert Smiths at your company, their email addresses should already be unique). The two password fields should only be filled in if it is a new user account, or if you want to change a password. For example, if you are only changing permissions on an existing user, you do not need to enter the password.

You'll notice that to the right of the password field, there will appear a strength meter. This not only shows you the strength of the currently entered password, but it shows you the minimum password strength needed, indicated by the red line, and whether your password is sufficiently strong or not. If your password does not meet the minimum strength requirement, you will not be able to save it.

Finally, you have the permissions section. The first item controls whether or not the user will have access to the client portal. If that is unchecked, the other three categories don't matter.

When you are finished adding or editing a user, click "Save Changes" to save.

Appointments

The Appointments module of the Client Portal shows you your past and upcoming appointments.

Browse Upcoming Appointments

The Upcoming Appointments section will give you a list of your upcoming appointments, as seen in figure 3.1.

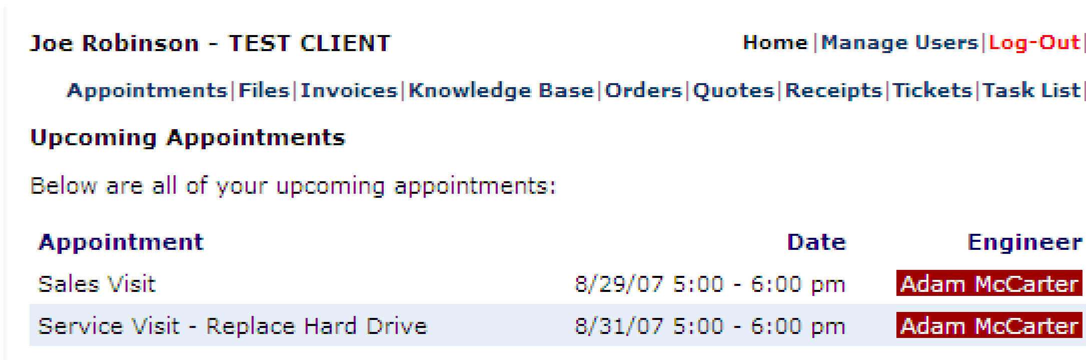


Figure 3.1

As you can see, this list will display the title of the appointment, the date and time, and the engineer assigned to the appointment, for all upcoming appointments.

Browse Past Appointments

The Past Appointments section will give you a list of your past appointments, as seen in figure 3.2.

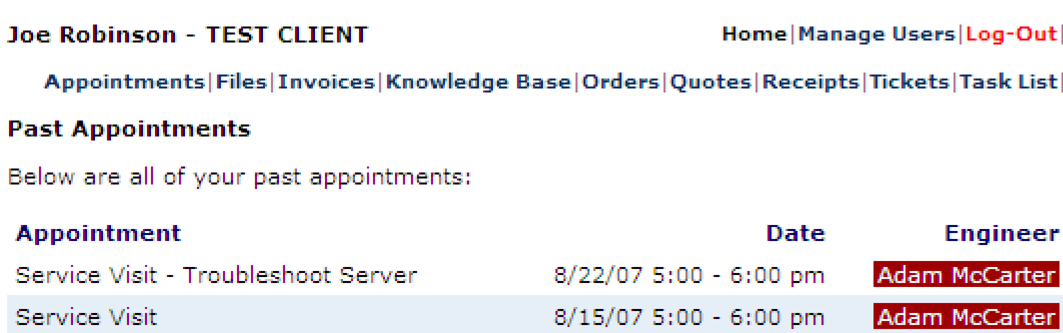


Figure 3.2

As you can see, this list will display the title of the appointment, the date and time, and the engineer assigned to the appointment, for all past appointments.

Files

The Files module allows you access to files which have been shared by your Technology Consultant from Excalibur’s main system.

Figure 4.1

As shown in figure 4.1, the “Browse Files” page shows you an index of all files available to you through the Client Portal. Each file has important file information alongside of it, like the filetype, date of last update, and size. Clicking on the file will allow you to download it to your local system.

Invoices

The Invoices module allows you to view all invoices that you have in the system.

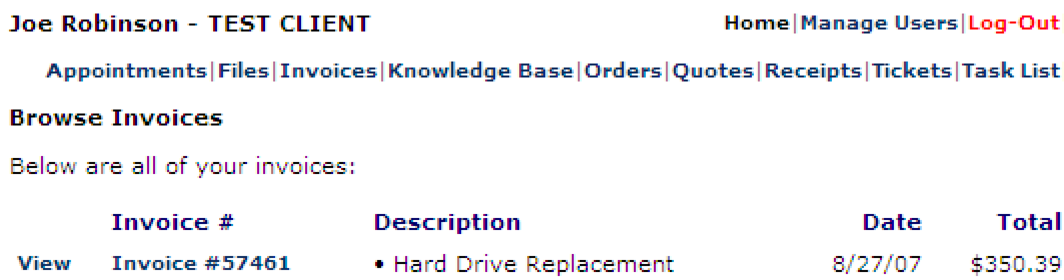


Figure 5.1

As shown in figure 5.1, the “Browse Invoices” page shows you a list of all the invoices that you have in the system. Each record lists the invoice number, a description of the invoice, the date it was invoiced, and the total for each invoice. Clicking on “View” next to each record will allow you to view a PDF of the actual invoice, and print it, if you need to.

Knowledge Base

The Knowledge Base module allows you to view all knowledge base articles that have been shared from Excalibur's main system.

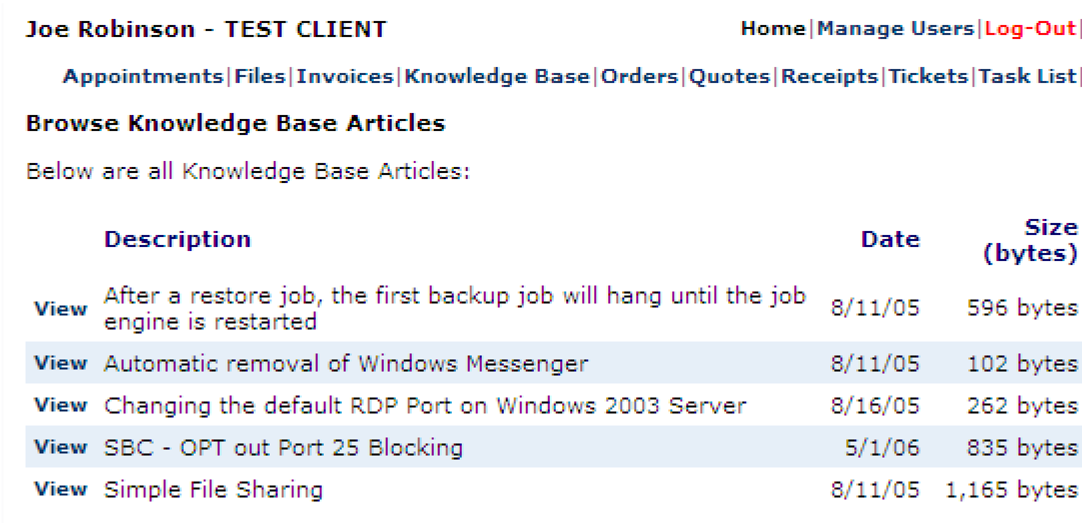


Figure 6.1

As shown in figure 6.1, the "Browse Knowledge Base Articles" page shows you a list of all the knowledge base articles in the system that have been shared with the Client Portal. The list shows the description for each article, the date it was last updated, and the size, in bytes. Clicking on "View" next to each article will load up that knowledge base article in the window, allowing you to read the full article.

Quotes

The Quotes module allows you to view all quotes that you have in the system.

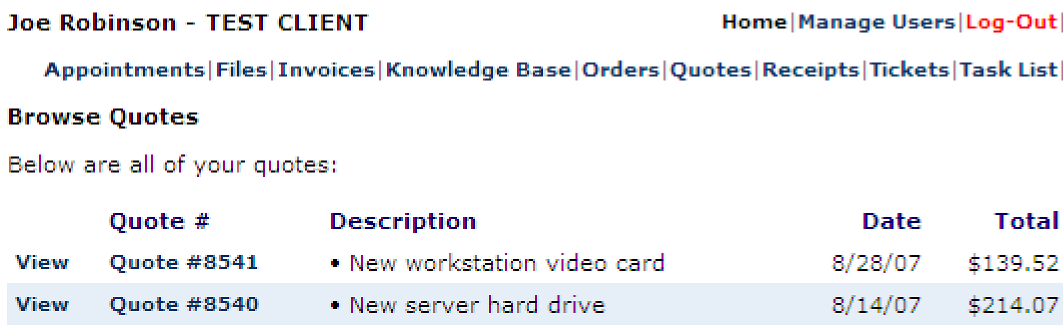


Figure 8.1

As shown in figure 8.1, the "Browse Quotes" page shows you a list of all of your quotes in the system. The list shows the quote number for each quote, the description, the date the quote was entered into the system, and the total amount of the quote. Clicking on "View" next to each quote will allow you to view a PDF of the actual quote, and print it, if you need to.

Task List

The Task List module allows you to manage all tasks that you have in the system.

Create New Task

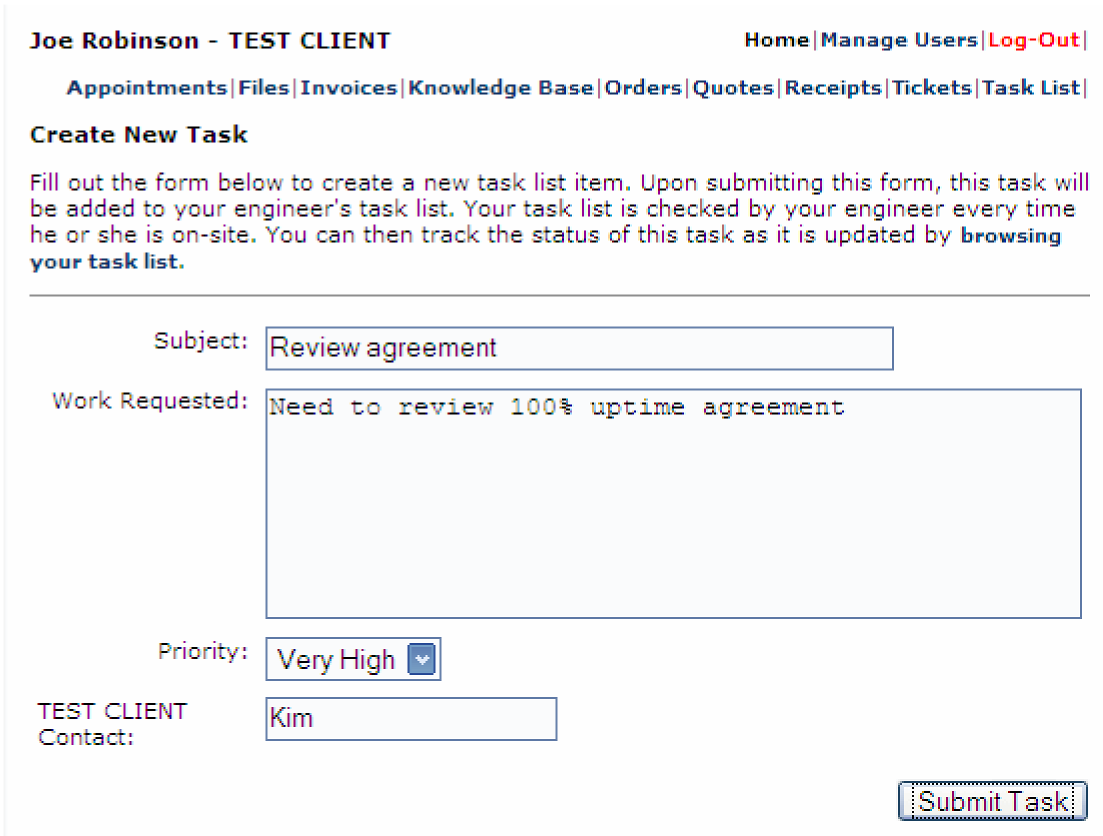


Figure 11.1

When you click on “Create New Task,” you are presented with the screen seen in figure 11.1. This is the “Create New Task” page, and it allows you add new tasks to your task list, which your engineer will consult when on-site. Just fill in the subject, the work requested, priority, and the contact for your company. When you are done, click the “Submit Task” button to enter the task in to the system.

Browse Current Tasks

Joe Robinson - TEST CLIENT

Home | Manage Users | Log-Out |

Appointments | Files | Invoices | Knowledge Base | Orders | Quotes | Receipts | Tickets | Task List |

Browse Open Tasks

Below are all of your open tasks. **Click here** to start a new task. **Click here** to browse completed tasks.

	Subject	Status	Contact	Priority	Last Updated
View	Review agreement		Kim	4. Very High	8/28/07
View	Replace server hard drive	Hard drive ordered	Kim	3. High	8/27/07
View	Replace video card		Joe Robinson	3. High	8/28/07

Figure 11.2

As shown in figure 11.2, the “Browse Open Tasks” page shows you a list of all of tasks in the system which are currently marked as “Open.” The list shows the subject, status, contact, and priority of each task, as well as the date of the last update on the task. Clicking on “View” next to each task will load up that task in the editing page. That way, you change details about the task, if you need to.

Browse Past Tasks

Joe Robinson - TEST CLIENT

Home | Manage Users | Log-Out |

Appointments | Files | Invoices | Knowledge Base | Orders | Quotes | Receipts | Tickets | Task List |

Browse Completed Tasks

Below are all of your open tasks. **Click here** to start a new task. **Click here** to browse open tasks.

	Subject	Status	Contact	Priority	Last Updated
View	Troubleshoot server	Completed	Joe	5. Critical	8/28/07
View	Set up 100% uptime agreement		Kim	4. Very High	8/28/07

Figure 11.3

As shown in figure 11.3, the “Browse Completed Tasks” page shows you a list of all of tasks in the system which are currently marked as “Closed.” The list shows the subject, status, contact, and priority of each task, as well as the date of the last update on the task. Clicking on “View” next to each task will load up that task in the editing page. That way, you change details about the task, if you need to.

Tickets

The Tickets module allows you to view all tickets that you have in the system, as well as open new tickets.

Open New Ticket

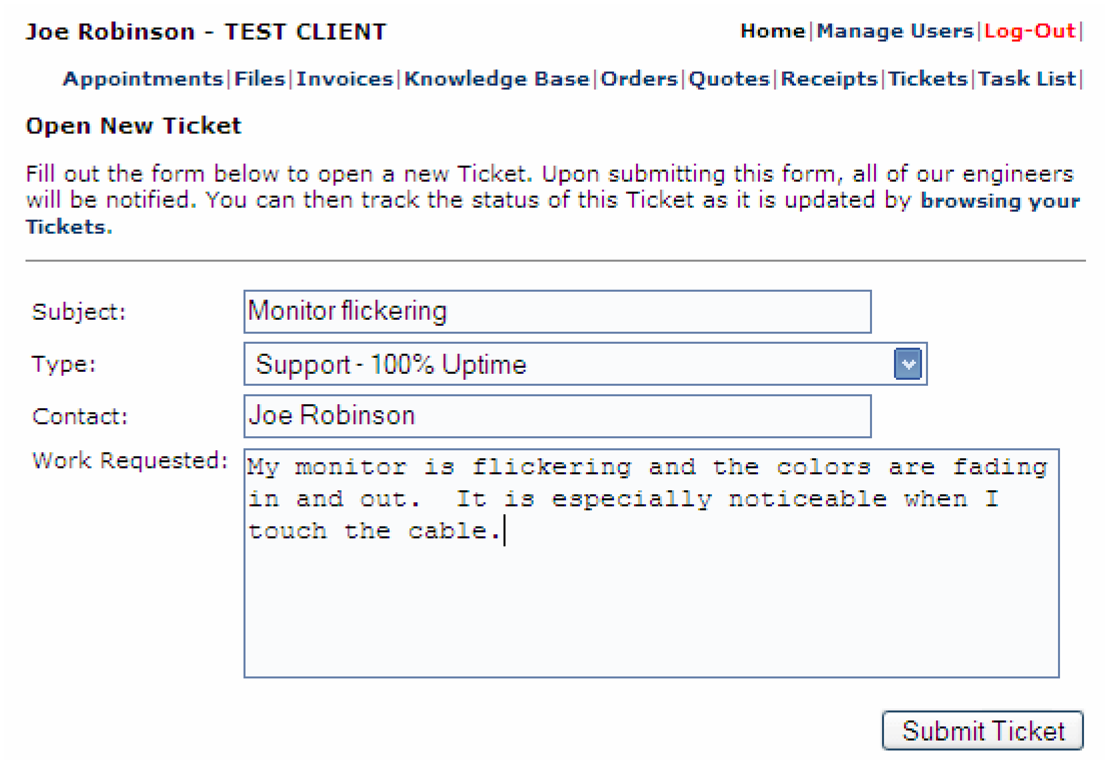


Figure 10.1

When you click on “Open New Ticket,” you are presented with the screen seen in figure 10.1. This is the “New Ticket” page, and it allows you submit support tickets into the system, where an engineer can address your issue. Just fill in the subject, select what type of ticket it is, from the list, type in a contact name for the ticket, and a short description of the problem. When you are done, click the “Submit Ticket” button to enter the ticket in to the system.

<u>Browse Tickets</u>

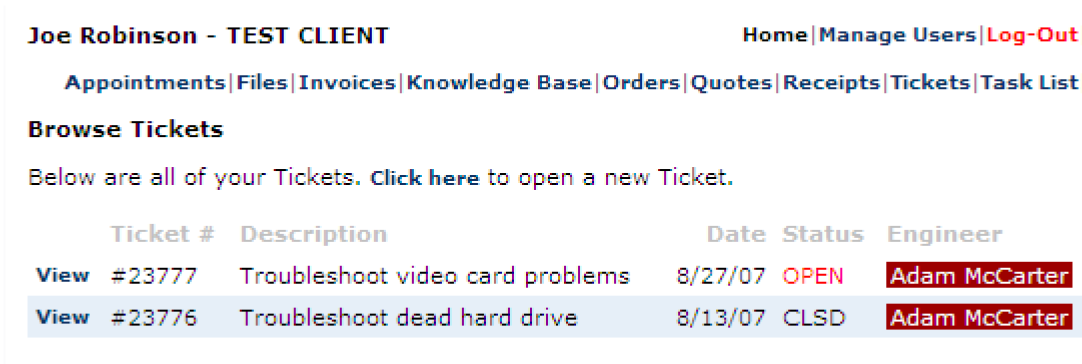


Figure 10.2

As shown in figure 10.2, the “Browse Tickets” page shows you a list of all of your tickets in the system. The list shows the ticket number for each ticket, the ticket description, the date of the last update to the ticket, the status of the ticket, and the engineer assigned to each ticket. Clicking on “View” next to each ticket will allow you to view a PDF of the actual ticket, and print it, if you need to.

Appendix A – Client Portal Information

Use this section to record all information about your client portal.

Client portal web address: http://client.excaltech.com

Client portal username: ______________________________

Client portal password: _______________________________