chess

Customer Portal

User and Account Administrator Guide

October 2021

Contents

Introduction

This guide explains the role of the Account Administrator and how to use the Chess Customer Portal. The Account Administrator is the person in your business with administrator access. Screenshots will be used where possible.

Customer Portal Users

This could be any person in your business who needs access to your Chess online account as authorised by the Account Administrator.

Devices compatible with the Customer Portal

Desktop (Windows/Mac) • Tablet • Smartphone

Browsers

Internet Explorer 8.0 and higher • Firefox • Chrome • Safari • Edge

Two Factor Authentication

For additional security, the Customer Portal requires two-factor authentication to access the site. We advise Users to receive verification codes on a mobile phone number to avoid automated systems.

Customer Portal Help

For help and support all Users and Administrators can contact us on **0344 770 6000**, select option 1 for Customer Service and then option 3 for help with our Customer Portal.

Getting Started

Log in to the Chess Customer Portal at **https://myportal.chessict.co.uk/login** and select **'sign up now'** to register.

If you are already registered, log in using your email address and password.

Watch our short video **HERE** and take a tour of the Customer Portal login.
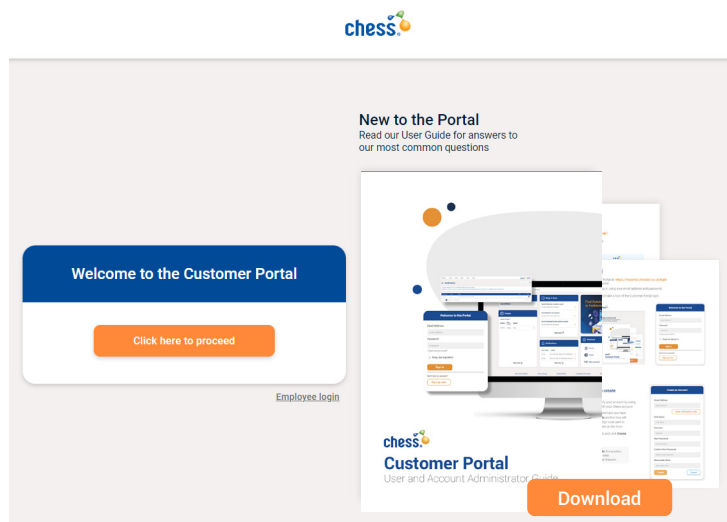
Next you will need to create your account.

From here you will need to verify your account by using the email that is associated with your Chess account

Once your email has been entered and you have selected **send verification code** another box will appear for you to enter the 6-digit code sent to the email address you submitted on the form.

Continue to submit your details and click **Create** once finished.

🔒 **Password must include:** 8 characters, including 1 uppercase letter, 1 number and 1 special character.

Login Tips

When I try to register, it won't accept my email address

You need to use the email address associated with your Chess account or the system will not recognise you as a customer. Contact us on the Customer Portal Help number and we can advise you of the correct email address to use.

Customer Portal help number

For all help and support to activate your account, you can contact us on **0344 770 6000**, select option 1 for Customer Service and then option 3 for help with our Customer Portal. Try the login tips before contacting us.

I can't access the verification code on the office phone

If you have used a landline number for the authentication process, you may be struggling to access the verification code. We advise that you change the landline number to a mobile number so that you can receive the code wherever you are. Contact us on the Customer Portal Help number and we can update to your preferred number.

The authentication is asking me to press the pound key

On a UK phone the pound key is the hash symbol #.

Dashboard Features

When you log in you will be taken to the main Dashboard. Features are expandable and include shortcuts and a news feed for service information.

Notification Centre

Sometimes Chess will send notifications to your account. These may vary in nature and can include important updates about your account, service outage alerts or product information and offers. Notifications will appear in the top-right of the navigation menu and are represented by a bell icon. When you have new/unread notifications, you will see a red counter hover over the bell

Clicking on the bell icon will trigger a dropdown menu to appear, containing a list of your 5 most recent notifications and a link to view more. To open a notification and read the content simply click on it from within the dropdown menu.
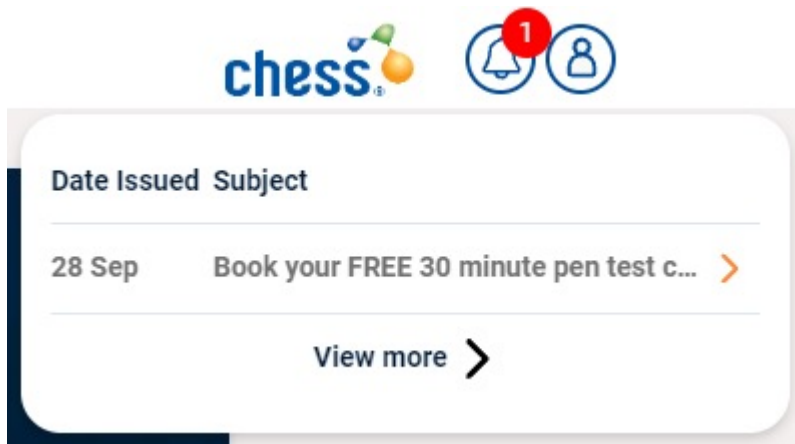
To access older notifications click View more > and you will be presented with a full list of your notifications.
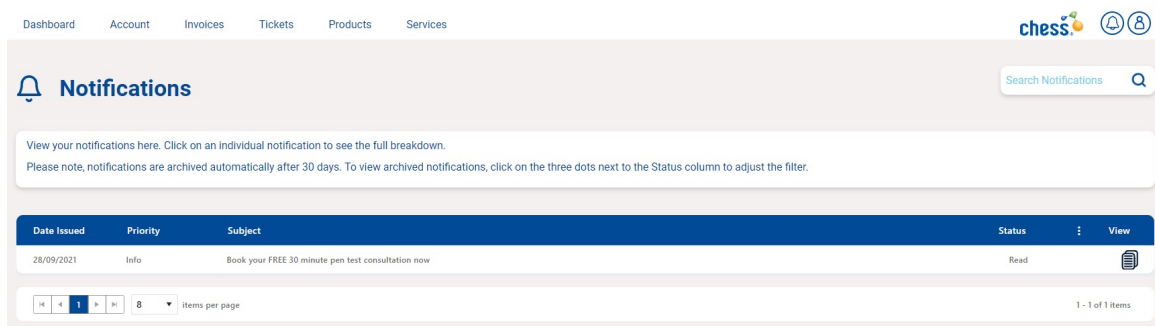
My Account

Use this to update your account details and set your billing preferences. You can also see the Users in your business who have access to your Customer Portal account.

Invoices

View all your invoices and select to see a full breakdown.

Direct Debits

Did you know that you can setup a Direct Debit within the Customer Portal? Never miss a payment deadline again! Simply select Setup Direct Debit from the Invoices menu. You will be asked to confirm that you hold a UK bank or building society account and that you are the only person required to authorise Direct Debits from the account.

You will then be asked to provide details of your bank or building society account. The details will be verified to ensure they match. After a few short steps you will receive confirmation that your Direct Debit has been processed, and you will be given the option to download your Direct Debit confirmation letter.

You can view your existing Direct Debits at any time by selecting Manage Direct Debit from the Invoices menu.

Make a Payment

Select **Make a Payment** from the Dashboard (middle column). The page lists all invoices that are outstanding, or where payment is in progress.

When you select one or multiple invoices and **Click to Proceed** you will see a summary and total value and a prompt to enter cardholder details.

Enter cardholder details and click **Pay Now**. The payment gateway page will display (example page below).

Once the payment has been processed you will receive either a payment successful or payment failed message.

Tickets

View your current logged tickets, click on an individual ticket and track progress. Using **My Tickets** is the best way to get your queries answered, unless you need to speak to sales or log an urgent fault. To raise a ticket, click on the **Log New Ticket** option on the menu.

Then select the ticket type and submit. Your ticket will be reviewed and assigned a response time, usually within 15 minutes of receiving it. You can track your ticket for updates at any time.

Products

View **Quotes**, **Licence** and **Returns** information here. This is an enhanced access area and requires higher level access for Users other than the Account Administrator. Assigning access is covered further on in this guide.
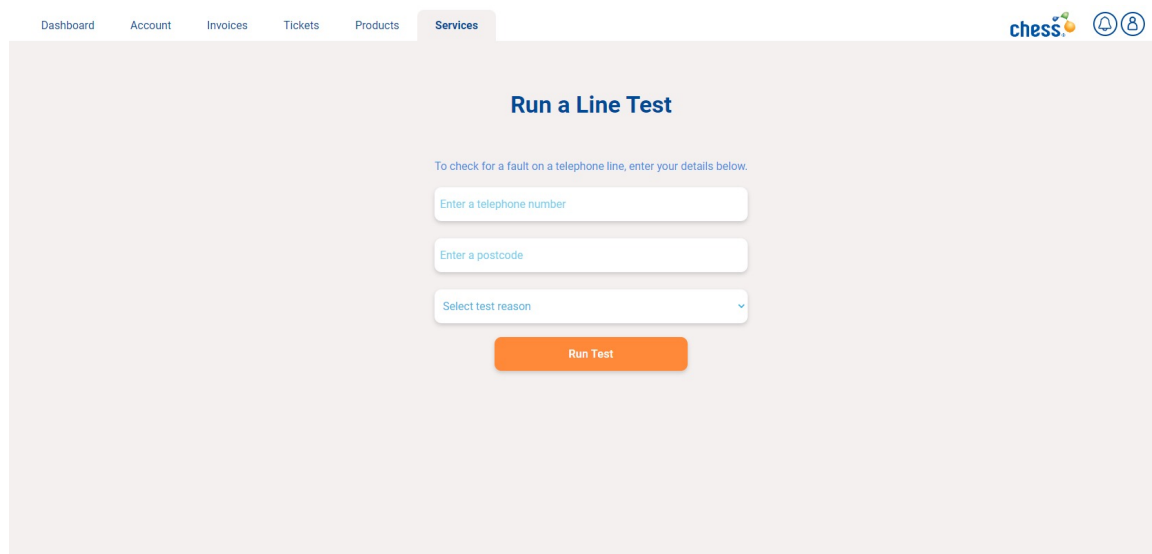
Line Fault Checker

If you suspect you have a fault on one of your phone lines, you can run a line test within the Customer Portal. To access this service select **Line Faults** from the **Services** menu..

You will be asked to enter the telephone number and corresponding postcode, then select a reason for the test from a dropdown menu. Select the option that best fits the problem you are experiencing, e.g. "No dial tone". Once you click **Run Test** a real-time diagnostic test will be carried out and if a fault is found on your line, you will be presented with a list of available engineer appointments over the next 5 business days. From here you will be able to select an appointment slot, and you will receive **confirmation of the engineer appointment booking** via email. A ticket will also be opened on your account to track the progress of the fault through to completion.

Passwords

Expiry

Passwords will expire every 90 days and a User will be asked to create a new password. Occasionally system updates can disrupt passwords and Users may be prompted to change their password when this happens. When changing the password, a User will not be able to use the previous password. The following rules for a strong password must be used.

🔒 **Password must include:** 8 characters, including 1 uppercase letter, 1 number and 1 special character.

Resets and Update Memorable Word

If a User needs a password reset or wants to update their memorable word, this can be completed by the Account Administrator on the Account Details page using the buttons at the bottom of the page.

The Account Administrator will need to log in to the Customer Portal using administrator credentials and click on the **Account Details** and use the **Change Password** and **Update Memorable Word** buttons at the bottom of the page.

Locked Accounts

If you continue to enter the wrong credentials into the Customer Portal your account will be locked for a period of time. The lockout duration gets longer the more failed logins occur, up to 5 hours.

There is an option to lock out an account permanently. This is available to Account Administrators on the **Account Details** page. To permanently lock out an account, access the grid of contacts, edit a record by clicking on the **pen/notepad** icon shown on the left hand side of the page, then tick the **Account locked out** option at the bottom.

Managing Users and Permissions

Account Administrators can add or delete users at any time. Care should be taken to give individual Users the correct access level to the Customer Portal and this is done by assigning permissions (roles). It's especially important that Account Administrators remove Users that may have left your business so that they cannot access your account.

5 Simple Steps to Managing Users

On the home screen, select **Account** then **Manage Contacts**.

From the grid of contacts, edit a record by **clicking on the pen/notepad icon** shown on the left-hand side of the page.

The next page shows **Customer Portal Permissions (see table below)** - you will see a selection of areas to validate an account, unblock or block an account.

Click on the boxes to select or unselect the choices you want to make.

Once you've made your selections click **Save Contact**.

Permission (role) categories

Quotes	View and authorise quotes and sales orders
Orders	View and print invoices
Contracts	View and access Portal Built contracts
Callouts	View and close any engineer callouts
Support	Log queries by raising a new ticket and track and manage any closed and open tickets
Projects	Keep track of open projects
Returns	Organise and view returns

Housekeeping

Account Administrators should set a weekly calendar event to make sure all account information on the Customer Portal is current. This is especially important for the security of your account, and as an Account Administrator it's your responsibility to maintain the information.

Help and Support

If you need us, we're just a phone call away **0344 770 6000**, select option 1 for Customer Service and then option 3 for help with our Customer Portal.

chess

ChessICT.co.uk