

Customer Portal

User and Account Administrator Guide

October 2021



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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

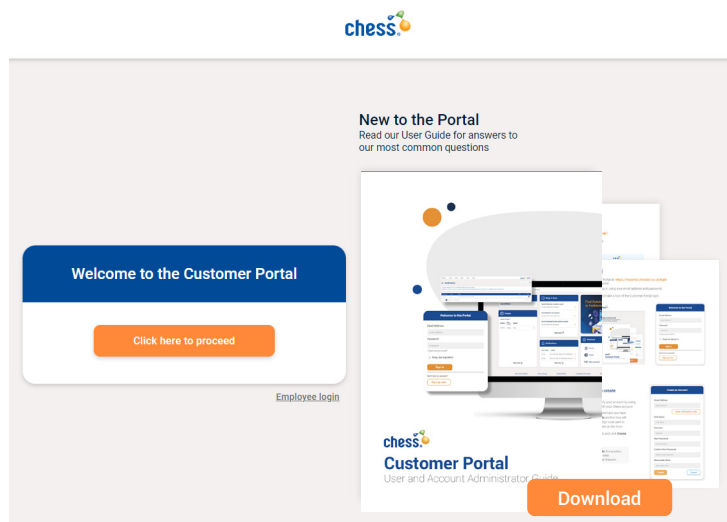
For help and support all Users and Administrators can contact us on **0344 770 6000**, select option 1 for Customer Service and then option 3 for help with our Customer Portal.

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.

The screenshot displays the Chess Customer Portal Dashboard. At the top, there is a navigation bar with tabs for Dashboard, Account, Invoices, Tickets, Products, and Services. The Chess logo and user profile icons are on the right. The main content area is divided into several sections:

- Customer Details:** Shows the Account Name.
- Tickets:** Lists the latest tickets with columns for Number, Date Issued, and Subject. One ticket is visible: 915772, 30 Sep, Test.
- Blogs & News:** Features three articles: "Android Enterprise Essentials Launch" (22 Jan, 3 Minutes), "How Resilient Is Your Security?" (22 Jan, 10 Minutes), and "Are You Frustrated by Slow Internet at Home?" (19 Jan, 3 Minutes). A "View more" link is at the bottom.
- Notifications:** Lists notifications with columns for Date Issued and Subject. Two notifications are visible: 13 Oct and 28 Sep (Book your FREE 30 minute pen test con...). A "View more" link is at the bottom.
- Shortcuts:** Provides quick access to Invoices, Tickets, and Make a payment.
- Find Solutions to Problems:** A large graphic with a rocket and gears.

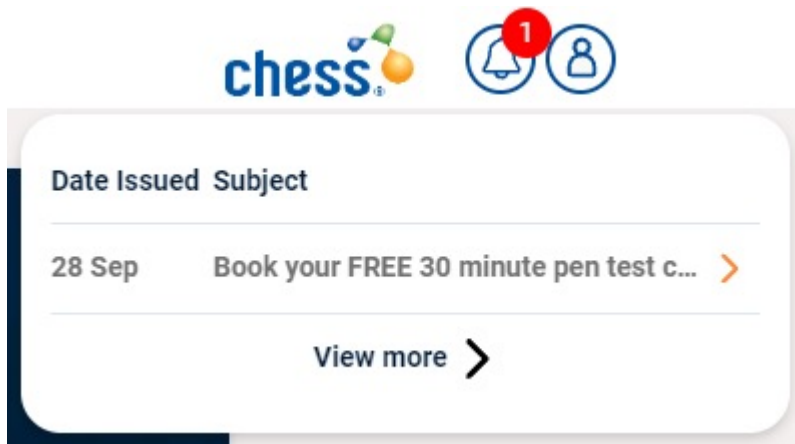
At the bottom of the dashboard, there are links for Terms & Conditions, Privacy Policy, Cookie Policy, Complaints Procedure, and (UAT).

Notification Centre

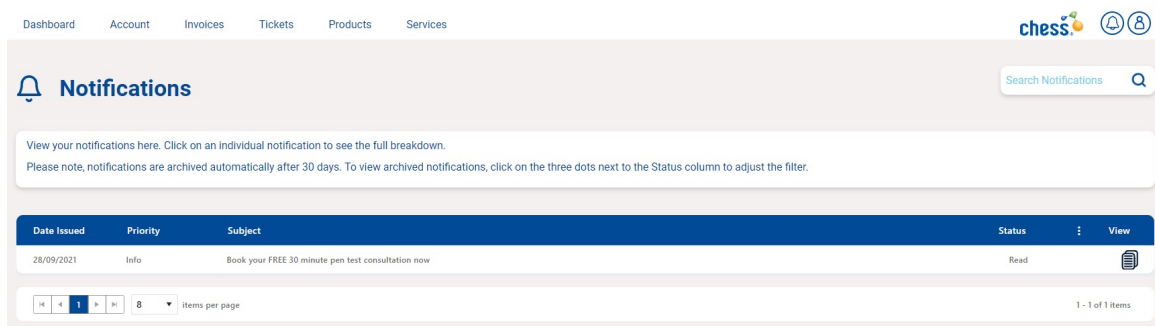
Sometimes Chess will send notifications to your account. These may vary in nature and can include important updates about your account, service outage alerts or product information and offers. Notifications will appear in the top-right of the navigation menu and are represented by a bell icon. When you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

Dashboard **Account** Invoices Tickets Products Services chess  



Account Details

Details	Contact Details
Title	Telephone
First Name	Mobile
Surname	Email
Full Name	Your email address cannot be amended; this is the address you use to log in.
Position	Address
	Bridgford House, Heyes Lane, Alderley Edge, Cheshire, SK9 7JP
	Billing Preferences
	How would you like to receive your bills? <input type="radio"/> Post <input type="radio"/> Email
	Marketing Preferences
	By subscribing to Chess Communications, you will receive service updates, exclusive content, product information, offers and deals, click below to opt in. <input checked="" type="checkbox"/> opt in <input type="checkbox"/> opt out

[Change Password](#) [Update Memorable Word](#) [Save Changes](#)

















Invoices

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

Dashboard **Account** **Invoices** Tickets Products Services chess  

[Search Invoices](#)

You can view all your invoices, simply select an invoice to see a full breakdown.

Invoice	Date Issued ↓	Order Number	Account Number	Status	Total	View	Download
	30/04/2021			Completed	£110.14		
	31/03/2021			Completed	-£153.64		
	28/02/2021			Completed	£465.30		
	28/02/2021			Completed	£21.60		
	31/01/2021			Completed	£465.26		
	31/12/2020			Completed	£465.50		
	30/11/2020			Completed	£515.66		
	31/10/2020			Completed	£454.88		

8 Items per page 1 - 8 of 13 items

[Terms & Conditions](#) [Privacy Policy](#) [Cookie Policy](#) [Complaints Procedure](#) (UAT)

[Make a Payment](#) [Manage Direct Debits](#)

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.

Dashboard Account **Invoices** Tickets Products Services

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New Direct Debit

To set up a Direct Debit please fill out the form below and click **Proceed**

By completing this form you agree that you have the permission of all parties needed to authorise the Direct Debit.

You can contact Chess Customer Services on 0344 770 6000 if you require support with setting up or changing a Direct Debit.

Our correspondence address is Bridgford House, Heyes Lane, Alderley Edge, Cheshire SK9 7JP.

Do you hold a UK bank or building society account and are you the account holder?

Yes

Are you the only person required to authorise Direct Debits from this account?

Yes

Terms & Conditions Privacy Policy Cookie Policy Complaints Procedure (UAT)

Cancel Proceed

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.

Dashboard Account **Invoices** Tickets Products Services

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New Direct Debit

To set up a Direct Debit please fill out the form below and click **Proceed**

By completing this form you agree that you have the permission of all parties needed to authorise the Direct Debit.

You can contact Chess Customer Services on 0344 770 6000 if you require support with setting up or changing a Direct Debit.

Our correspondence address is Bridgford House, Heyes Lane, Alderley Edge, Cheshire SK9 7JP.

Please select the account that this Direct Debit should be linked to

Please select...

Not sure what to select? Click here for more information.

Bank Sort Code

Enter your bank sort code

Bank Account Number

Enter your bank account number

Account Name

Enter your bank account name

Download Direct Debit Instruction

The Direct Debit Guarantee

This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits

If there are any changes to the amount, date or frequency of your Direct Debit Chess ICT Limited will notify you 5 working days in advance of your account being debited or as otherwise agreed. If you request Chess ICT Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request

If an error is made in the payment of your Direct Debit, by Chess ICT Limited or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society

If you receive a refund you are not entitled to, you must pay it back when Chess ICT Limited asks you to

You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

Terms & Conditions Privacy Policy Cookie Policy Complaints Procedure (UAT)

Cancel Proceed

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

Dashboard Account **Invoices** Tickets Products Services

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Direct Debits

Search Direct Debits

You can view all your Direct Debits, simply select a Direct Debit to see a full breakdown.

You can contact Chess Customer Services on 0344 770 6000 if you require support with setting up or changing a Direct Debit.

Our correspondence address is Bridgford House, Heyes Lane, Alderley Edge, Cheshire SK9 7JP.

Account Number	Bank Sort Code	Bank Account Number	Direct Debit Reference	Account Name	View	Letter
001	00100	00100	00100	00100	View	Letter

1 - 1 of 1 items

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.

Dashboard Account **Invoices** Tickets Products Services

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Make a Payment

Below are all outstanding invoices for your account. Select which invoices you would like to pay and then click Proceed to Payment.
We cannot take a further payment against an invoice if the status shows as payment processing. Please try again later.

Invoice Number	Date Issued ↓	Order Number	Account Number	Total	Outstanding Amount	Select
	30/04/2021			£110.14	£110.14	<input type="checkbox"/>
	31/03/2021			-£153.64	-£153.64	<input type="checkbox"/>
	28/02/2021			£465.30	£465.30	<input type="checkbox"/>
	28/02/2021			£21.60	£21.60	<input type="checkbox"/>
	31/01/2021			£465.26	£465.26	<input type="checkbox"/>
	31/12/2020			£465.30	£465.30	<input type="checkbox"/>
	30/11/2020			£515.66	£515.66	<input type="checkbox"/>
	31/10/2020			£454.88	£454.88	<input type="checkbox"/>

1 - 8 of 13 items

Terms & Conditions Privacy Policy Cookie Policy Complaints Procedure (UAT)

Manage Invoices Setup Direct Debit Proceed to Payment

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).

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Chess ICT

Order description: Chess Ltd Payment

To pay
£36.83

How do you want to pay?

- VISA Visa
- VISA Visa Debit
- VISA Visa Electron
- MasterCard
- Debit MasterCard

Cancel

Your payment is secured by sage | pay

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.

Dashboard Account Invoices **Tickets** Products Services

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Tickets

Search Tickets

View your tickets here. Click on an individual ticket to see the full breakdown. To view closed tickets, click on the three dots next to the Status column and adjust the filter.

Ticket Number	Date Issued	Assigned To	Details	Status	View
913223	01/06/2021	Chess ICT Helpdesk	FW: Contact Form Submission	New	View
913222	01/06/2021	Chess ICT Helpdesk	FW: Sales Contact Form Submission	New	View
913215	01/06/2021	Chess ICT Helpdesk	FW: Contact Form Submission	New	View
912922	01/06/2021	Chess ICT Helpdesk	Undeliverable: My Active Support	New	View
912776	01/06/2021	Chess ICT Helpdesk		New	View
912775	01/06/2021	Chess ICT Helpdesk		In Progress	View
912439	01/06/2021	Chess ICT Helpdesk		New	View
912394	01/06/2021	Chess ICT Helpdesk		New	View

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Terms & Conditions Privacy Policy Cookie Policy Complaints Procedure (UAT)

[+ Log New Ticket](#)

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.

Select the service to log a support ticket

[Technical Services](#) →
IT Support or to report a fault

[Account & Billing](#) →
General account queries

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.

Dashboard Account Invoices Tickets **Products** Services

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Quotes

Search Quotes

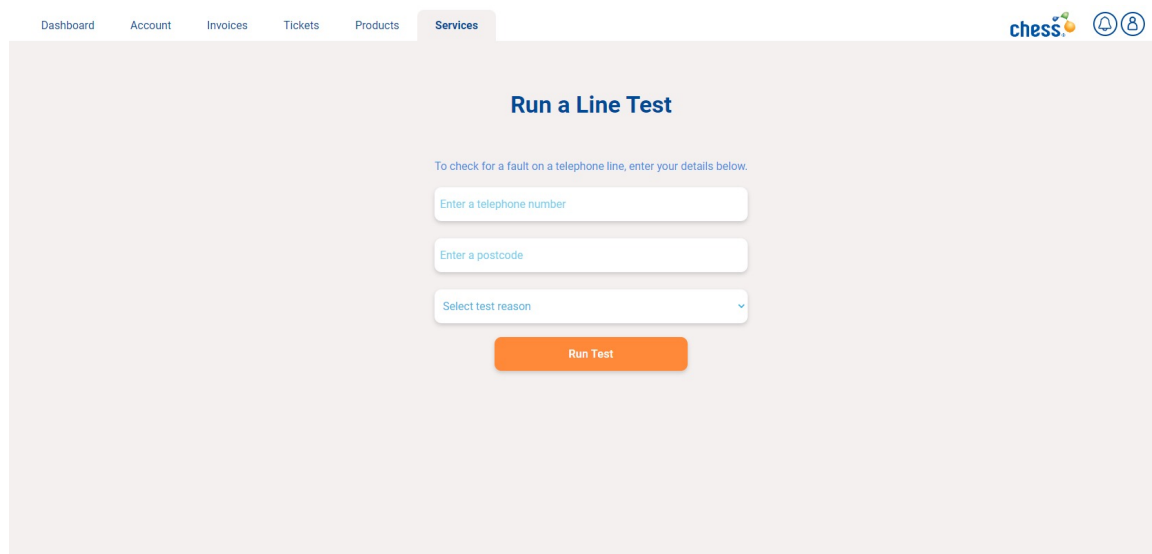
You can view all your quotes below, select a quote to see a full breakdown.

Quote ID	Date	Contact	Details	Items	Total Value	Status	View
398031	26/05/2021			1.00	£3.02	Pending	View
398029	26/05/2021			2.50	£474.42	Pending	View

1 - 2 of 2 items

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..



The screenshot shows the 'Run a Line Test' form within the Chess Customer Portal. The navigation bar at the top includes 'Dashboard', 'Account', 'Invoices', 'Tickets', 'Products', and 'Services' (which is highlighted). The 'chess.' logo and user profile icons are visible in the top right. The form itself is titled 'Run a Line Test' and contains the following elements:

- A heading: **Run a Line Test**
- A sub-heading: *To check for a fault on a telephone line, enter your details below.*
- A text input field: *Enter a telephone number*
- A text input field: *Enter a postcode*
- A dropdown menu: *Select test reason*
- An orange button: **Run Test**

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.

Dashboard **Account** Invoices Tickets Products Services chess

Account Details

Details	Contact Details
Title	Telephone
First Name	Mobile
Surname	Email
Full Name	Your email address cannot be amended, this is the address you use to log in.
Position	Address
	Bridgford House, Heyes Lane, Alderley Edge, Cheshire, SK9 7JP
	Billing Preferences
	How would you like to receive your bills?
	<input type="radio"/> Post <input type="radio"/> Email
	Marketing Preferences
	By subscribing to Chess Communications, you will receive service updates, exclusive content, product information, offers and deals, click below to opt in.
	<input checked="" type="radio"/> Opt In <input type="radio"/> Opt Out

[Change Password](#) [Update Memorable Word](#) [Save Changes](#)

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.

Dashboard Account Invoices Tickets Products Services chess

Edit Contact

Details

Title

First Names

Surname

Full Name

Position

Contact Details

Telephone

Mobile

Email

Address

Customer Portal Permissions

Quotes Orders Contracts Callouts Support MyPortal Admin Projects Returns

[Show more details about the roles](#)

You cannot amend your own permissions. Please ask your Customer Portal Administrator to update these for you.

Account validated on 09th Mar 2020 17:18

[Back to Manage Contacts](#) [Save Contact](#)

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**.

Dashboard Account Invoices Tickets Products Services chess

Manage Contacts

Select a contact to edit information and see Customer Portal permissions.

Title	Full Name ↑	Email	Position	Account Status	Last Login	Edit
				Locked	Never	
			1st Line Support	Locked	Never	
			Business Solutions Sales Executive	Locked	Never	
			Senior Developer	Chess account	24/03/2021	
			Directors Office Team Leader	Not registered	Never	
			Customer Experience Team Leader	Not registered	08/12/2020	
				Not registered	Never	
			Finance Manager	No email	Never	

1 - 8 of 1379 items

[Terms & Conditions](#) [Privacy Policy](#) [Cookie Policy](#) [Complaints Procedure](#) (UAT)

[Add New Contact](#)

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.

Customer Portal Permissions

Determine the areas of Customer Portal this contact will be permitted to access

Quotes Orders Contracts Callouts Support MyPortal Admin Projects Returns

[Show more details about the roles](#)

You cannot amend your own permissions. Please ask your Customer Portal Administrator to update these for you.

Account validated on 29th May 2020, 17:18

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.



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