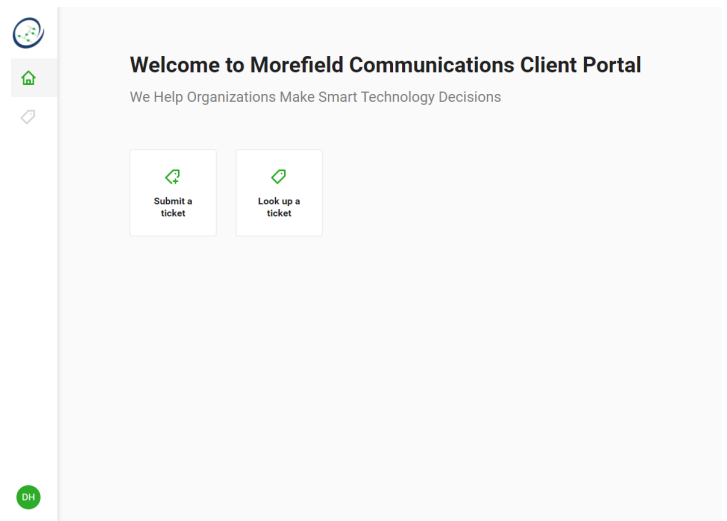


HOW TO USE THE MOREFIELD CLIENT PORTAL

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 Client Portal. The audience of this guide is intended to have administrative access to the portal.

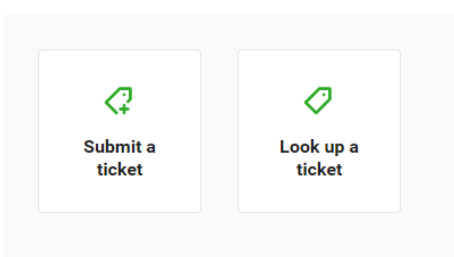
Log in to the Client Portal

1. Navigate to morefield.myportallogin.com from your computer or your mobile phone.
2. Choose to sign in with a Microsoft or Google account. (If you do not have a Microsoft or Google account click 'Sign up' and fill out the requested details, please note that your email must match your business email used by our ticketing system when signing up through this method).
3. The Client Portal homepage loads. Depending on your level of access, the page will display a variety of options.



Navigate the Client Portal

Service 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.
- **Look up a ticket:** Click to review all open and closed tickets in the client portal. Search by ticket number or filter by ticket summary.

Invoices *(Only Available to Administrators)*



View an invoice

- **View an invoice:** Click to view all invoices that are ready to be paid.
- Print or save a PDF copy of your invoice right from your browser.
- View paid invoices.

Projects *(Only Available to Administrators)*



View a project

- **View a project:** Click to view Gantt charts for current projects.
- Click on the project phases to view project tickets, request more details, or add a comment.
- Track phases and milestones as they progress.

Contact Management *(Only Available to Administrators)*



Manage user

- **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, Ticket Manager, Billing, Admin, Standard User, Ticket Read-Only, and No Access. A full description of each role is available within the portal.
- Add a new contact and set their role. You no longer need to request a new portal user; you can create one for your company.

Log Out



Log Out

- **To log out:** Click on your initials in the bottom left-hand corner of the screen and select **Log Out**.