

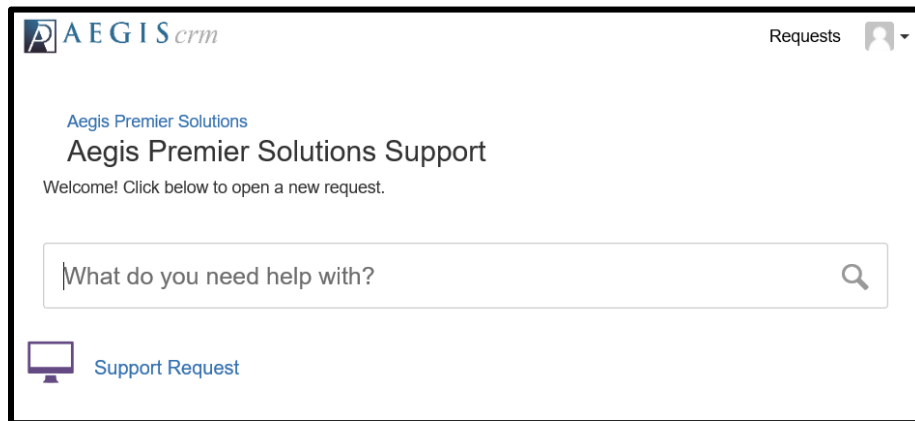
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## Introducing the New Aegis CRM Support Portal

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### About the Support Portal

The new Aegis CRM support portal provides users with an easy way to add and track support requests you submit.

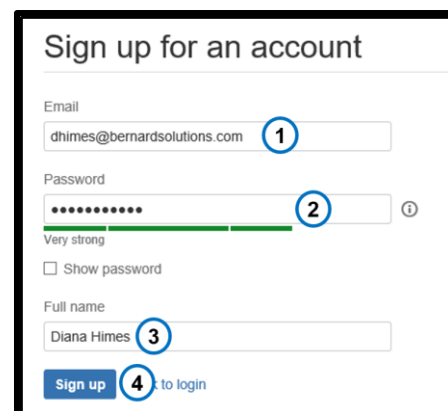


This new portal integrates with Aegis Premier Solutions' internal systems including our product development and soon with Aegis CRM online help so you can search for help before submitting a support request.

### Create a Support Portal Account

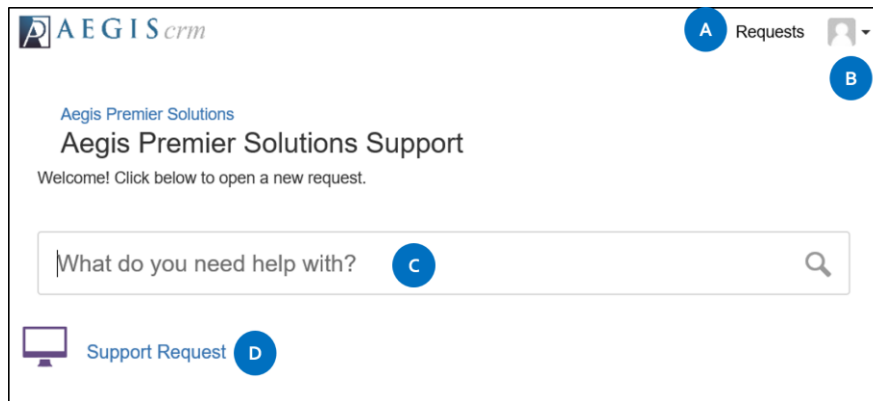
Before you can submit a support request, you must create a support portal account. To create your account, open your internet browser and enter [support.aegispremier.com](http://support.aegispremier.com). Follow these steps to complete the process:

1. In the Email field, enter your email address.
2. In the Password field, enter a password.
  - a. We recommend these requirements for your password:
    - i. At least 6 characters.
    - ii. Contain numbers, symbols, and mixed-case letters.
    - iii. Avoid using sequential numbers or characters.
3. Enter your full name.
4. Click Sign up.



**NOTE: If you have any open support requests, a support portal account will be automatically created for you and you will receive an email prompting you to log in to your new account to create a password.**

Once you have created your new account, you will receive an email confirming that your account has been created. When you log in to the new support portal, the Home page displays so you can submit a request.



- A. Displays the number of open requests you have with Support. Click the Requests link to view your open requests.
- B. Update your user profile or logout of the portal. If you want to update your profile, you can change the time zone and your password.
- C. With the release of the new Help portal, you will be able to search for assistance prior to submitting a Support request.
- D. To submit a ticket, click the Support Request link.

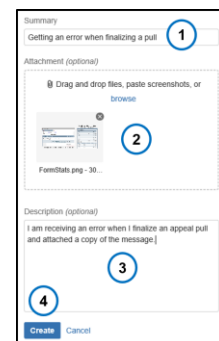
## Submit a Support Request

You can submit a support request using the same channels you have in the past:

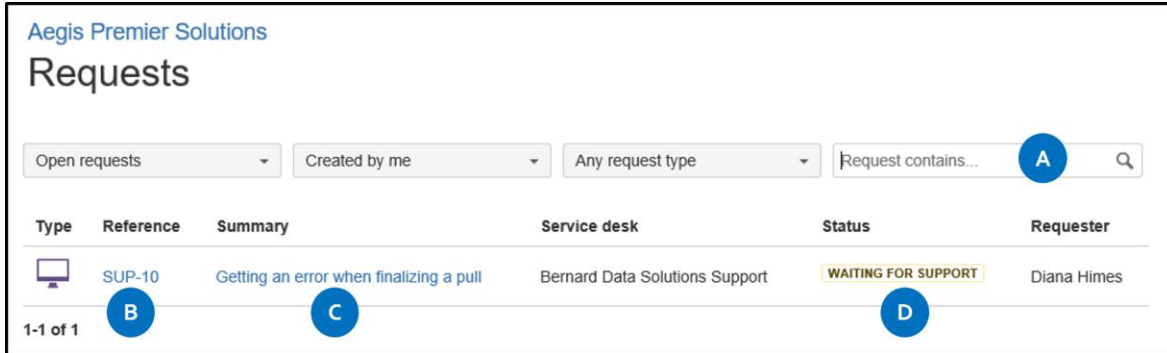
- Email: [support@aegispremier.com](mailto:support@aegispremier.com)
- Online Portal: <http://support.aegispremier.com>
- Phone: 303-629-2727, Option 2

When you visit [support.aegispremier.com](http://support.aegispremier.com) to submit a support request, log in with your new account and then follow these steps:

1. Enter a summary for the request.
2. Upload or drag and drop files that document the issue.
  - a. Example: Screenshot of an error message
3. Provide additional details about the issue in the **Description** field.
4. Click **Create**.



Once you submit the request, you will receive an email confirming that your request has been submitted and received by the Support team. You can also access and monitor updates to the request from the Home page of the portal. Click Requests in the top right corner to view the details of your requests.



- A. You can search for open requests using these buttons or entering criteria in the search field.
- B. The request ID number displays in the Reference column.
- C. The summary information you entered when you submitted the request displays in the Summary column. You can click the link to open the request.
- D. The status of your request displays in the Status column.

## Monitor a Support Request

When you open a support request from the Request page, you can view this information:

- A. The status of the request displays on the page.
- B. Add any comments or upload documentation you have related to the request.
- C. Any updates to the request will be emailed to you.
  - a. Click **Don't notify me** to stop email updates.
- D. All the activity related to the request displays so you can track updates.
- E. View the details of the request.

