



Navigating the Vertical Customer Portal

Vertical's new customer portal is here! The customer portal was designed with you in mind. From within the customer portal you can:

- Open support requests.
- Immediately access service request Service Order Numbers to track your support request.
- Review your invoices and statements.
- Pay Vertical bills online.

Accessing the Customer Portal

You can access the customer portal by visiting portal.vertical.com. Log in by entering the username and password that was included in your customer portal confirmation email.

Enter in your username and password and then click "Login".

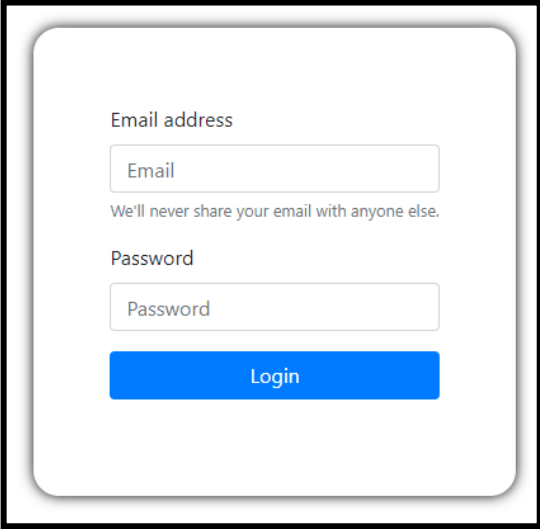
The image shows a login form for the Vertical Customer Portal. It is a white rectangular box with rounded corners and a subtle drop shadow. Inside the box, there are two input fields: one for 'Email address' and one for 'Password'. The 'Email address' field has a placeholder text 'Email'. Below this field is a small line of text: 'We'll never share your email with anyone else.' The 'Password' field has a placeholder text 'Password'. Below the password field is a blue button with the text 'Login' in white.

Figure 1: Customer Portal Login

Your customer portal dashboard will open.

The Customer Portal Dashboard

When the dashboard opens, you will have the option of navigating between multiple tabs.

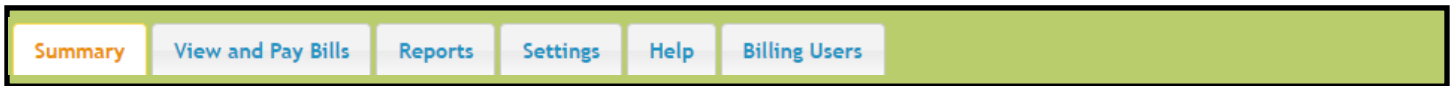


Figure 2: Customer Portal Tabs

The “Summary” Tab

When you log in, the Summary tab will be open. The Summary tab show a Summary balance, with three “tile” snapshots. The tiles are: Current Balance, Balance Due Date, and Overdue Balance.

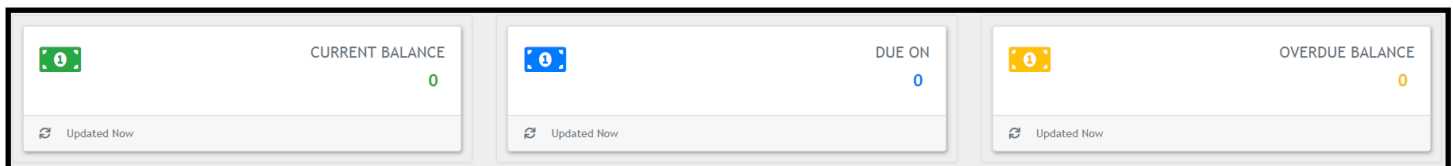


Figure 3: Summary Screen

The “View and Pay Bills” Tab

When you click on the “View and Pay Bills” tab, you will see a list of all Vertical invoices that you have received. It will show invoice number, created date, due date, amount to pay, and status. You can also open each invoice and search for specific invoices.

View & Pay Bills						
Search: <input type="text"/>		Export				
Invoice ▼	Customer	Created Date	Due Date	Amount To Pay	Status	Total : 13
2096062	110300 AMERICAN COLLEGE OF PHYSICIANS	2/18/2020	3/19/2020	127.50	paidInFull	View Invoice

Figure 4: View and Pay Bills Screen

The “Reports” Tab

When you click on the “Reports” tab, you will have access to reports about the service and orders for your communications system. Typical reports include “Sales Order Status”, which allows you to review your equipment orders. You can sort by reports or search for reports.

Reports Details						
Report: Sales Order Status ▼		Total : 60				
Search: <input type="text"/>		Export				
Sales order ▲	Date	Customer	Service Order	Order Memo	Status	
1529597	6/28/2019		SO33308	SR: / NEW INSTALL / CASH SALE / INSTALL 8X8	fullyBilled	

Figure 5: Reports Screen

The “Settings” Tab

There are two sections under Settings tab: General Information and Autopay

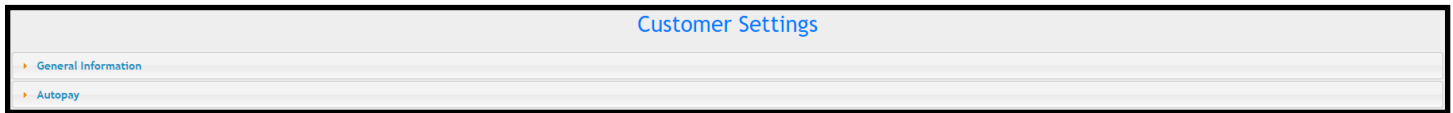
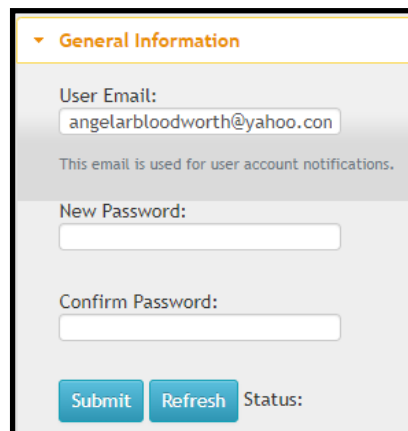


Figure 6: Settings Screen

General Information, Settings Subsection

Under the General Information subsection, you will can access your User Email, which is used for user account notifications. This can be changed if your point of contact changes. You can also reset your password.

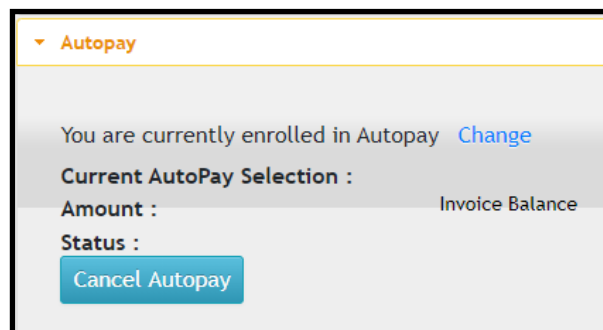


The screenshot shows the "General Information" subsection with a dropdown arrow and the text "General Information". Below this, there are three input fields: "User Email:" with the value "angelarbloodworth@yahoo.com", "New Password:", and "Confirm Password:". Below the input fields are three buttons: "Submit", "Refresh", and "Status:".

Figure 7: General Information Subsection Screen

Autopay, Settings Subsection

Under the Autopay subsection, you can manage your enrollment in autopay. You can change your Autopay settings or cancel Autopay.



The screenshot shows the "Autopay" subsection with a dropdown arrow and the text "Autopay". Below this, there is a message: "You are currently enrolled in Autopay" followed by a blue link "Change". Below this, there is a section titled "Current AutoPay Selection :" with two columns: "Amount :" and "Invoice Balance". Below this, there is a section titled "Status :" with a blue button "Cancel Autopay".

Figure 8: Autopay Subsection Screen

The “Help” Tab

Under the Help tab, you will find a list of Frequently Asked Questions, including information on who to call if you have a question about billing, how to troubleshoot if you aren’t receiving invoices, and more.

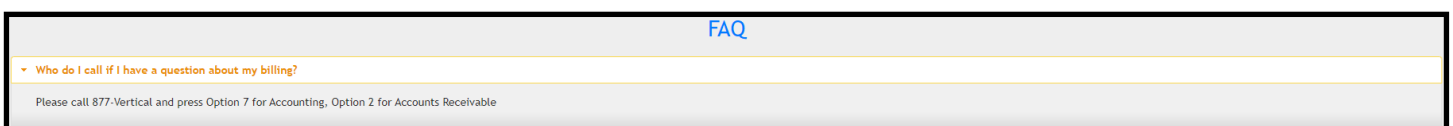


Figure 9: Help Screen

The “Billing Users” Tab

Under the Billing Users tab, you can will be able to manage the users with access to your customer portal account. You can:

- Search Users
- Edit Users
- Export Users
- Deactivate Users
- Add Users
- Reset Passwords

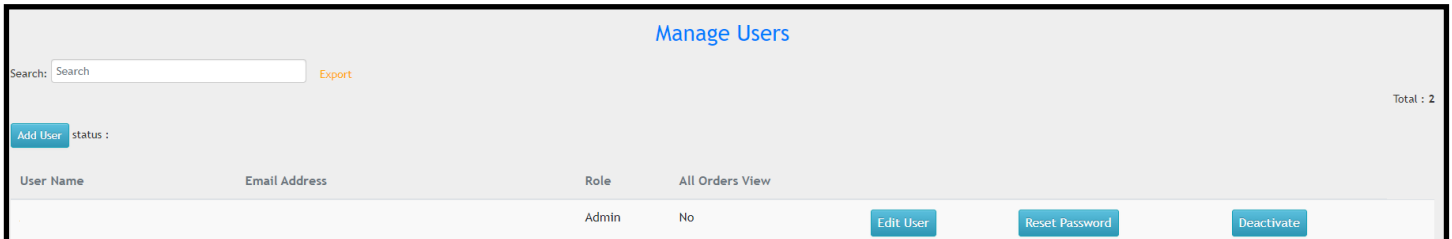


Figure 10: Billing Users Screen

Viewing Service Orders

You can submit and view service orders from within the customer portal. The “View Service Orders” button is in the header of your Customer Portal Account. To submit or view a service order, click the “View Service Orders” text in the upper-left corner.

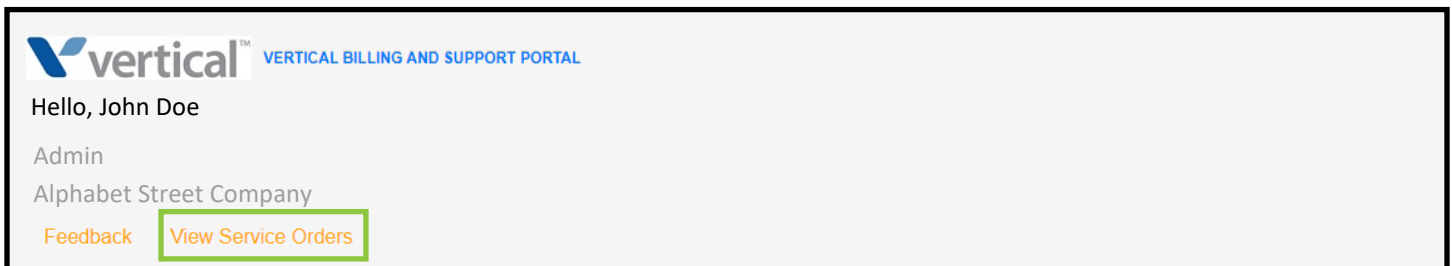


Figure 11: Viewing Service Orders Link

When you click the “View Service Orders” link, a new window will open asking if you would like to “Switch to Service Orders”. Click “Yes”.

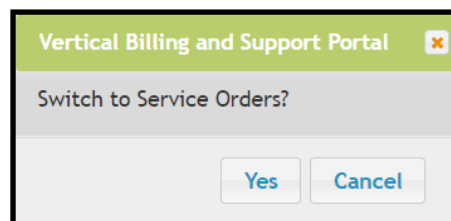


Figure 12: Switch to Service Orders

You will move to the Service Orders screen.

When the Service Orders dashboard opens, you will have the option of navigating between multiple tabs.



Figure 13: Service Order Tabs

The “Service Orders” Tab

When you click the Service Orders tab, a list of all Service Orders filled for your company will open. You can search by service order and open and view each service order.

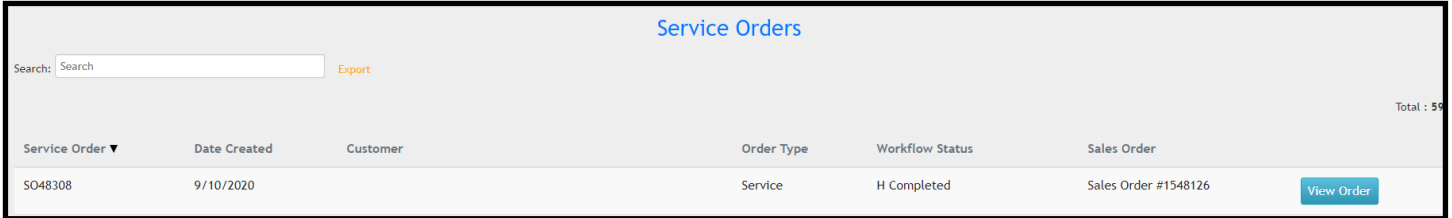


Figure 14: Service Order Screen

The “Create New Order” Tab

When you click the Create New Order tab, the “Service Requester” screen will open. Populate each of the fields to submit a service order, and click “Submit”.

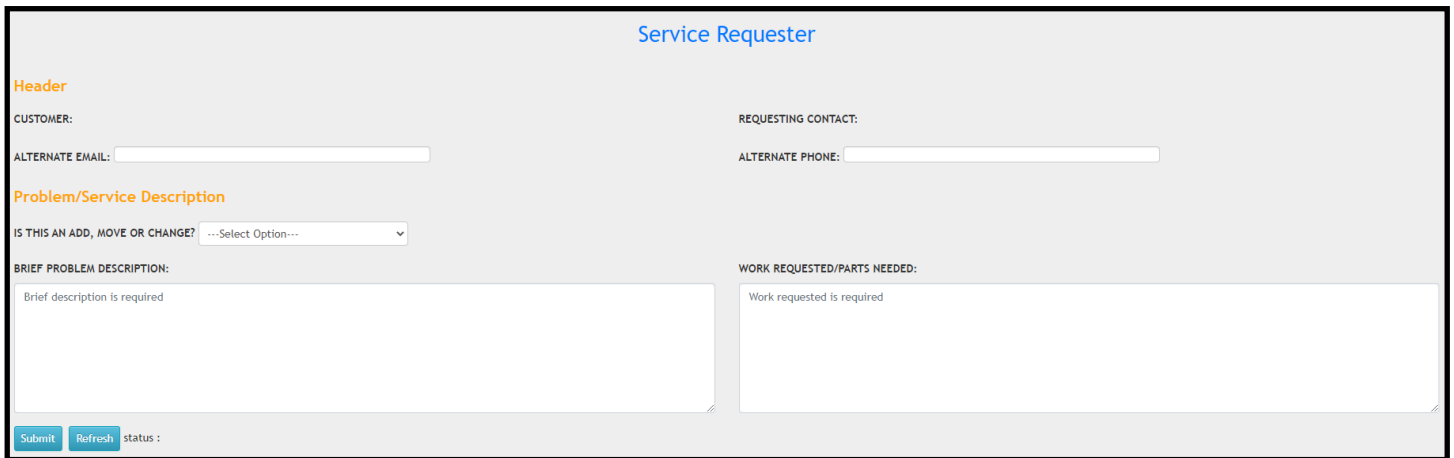
A screenshot of the 'Service Requester' form. The title 'Service Requester' is at the top in blue. The form is divided into two main sections. The left section is titled 'Header' and contains fields for 'CUSTOMER:', 'ALTERNATE EMAIL:', and 'Problem/Service Description'. The right section is titled 'REQUESTING CONTACT:' and contains fields for 'ALTERNATE PHONE:' and 'WORK REQUESTED/PARTS NEEDED:'. At the bottom, there are 'Submit' and 'Refresh' buttons, and a 'status:' label.

Figure 15: Submitting a Service Request

Feedback

We would love to hear about your experience with the customer portal! Your feedback helps us improve. To provide feedback, click the “Feedback” text on the upper left-hand corner of the header.

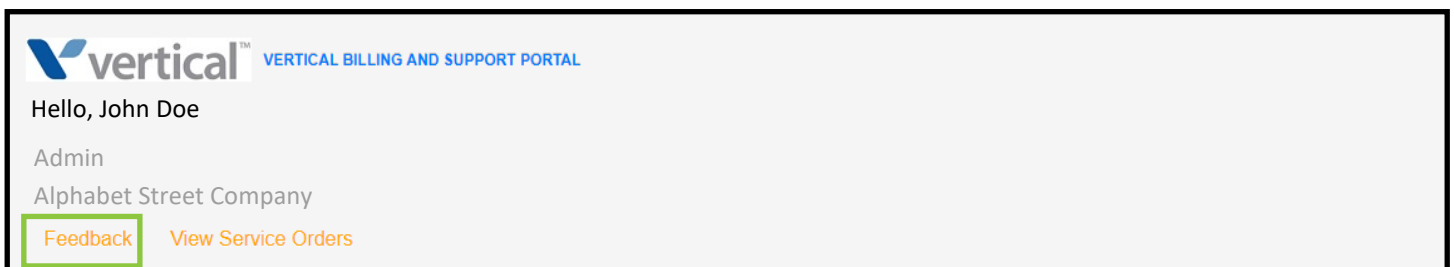
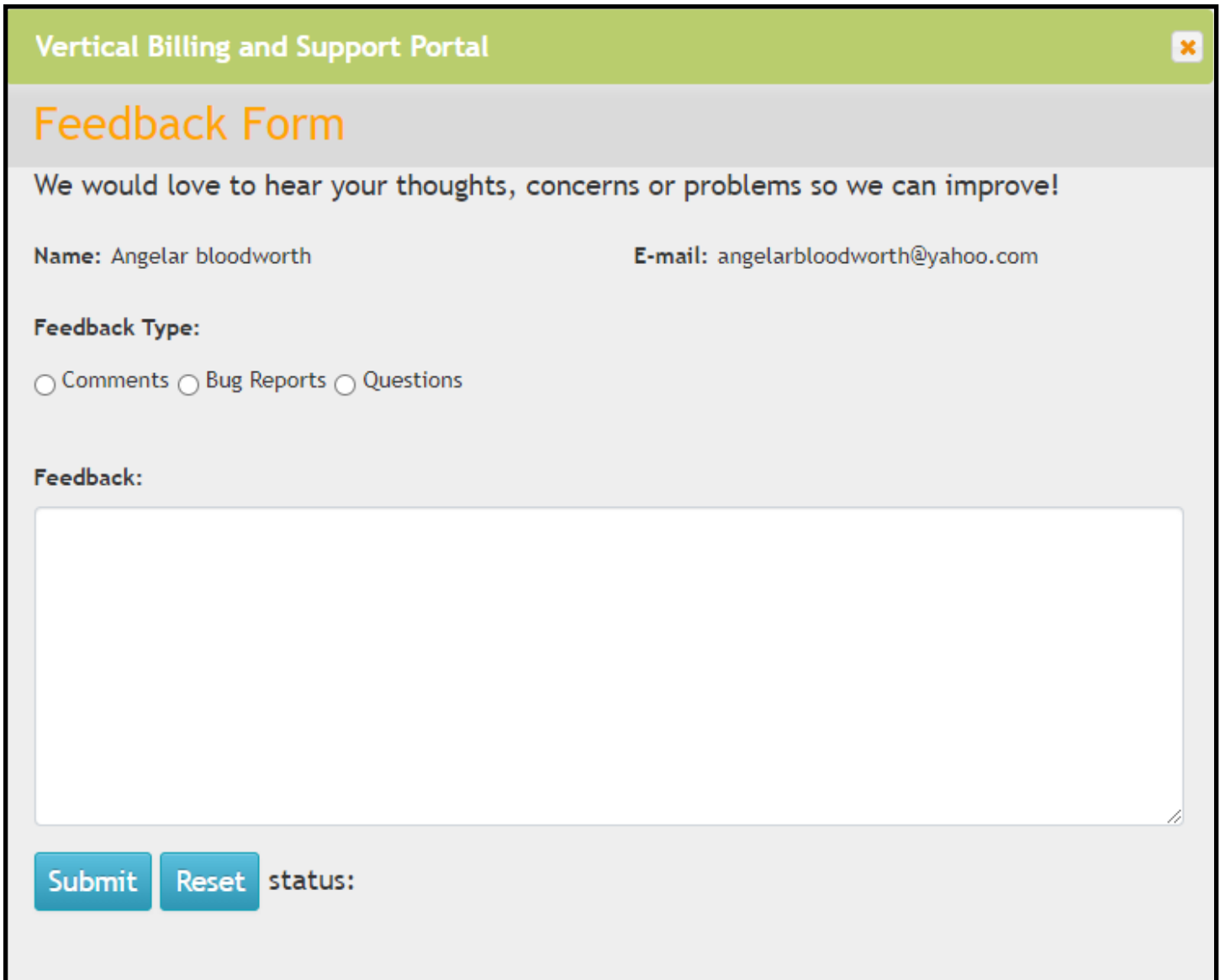


Figure 16: Submitting Feedback

A new window will open. Complete the fields in the Feedback form to share your feedback, and then click "Submit".



The screenshot shows a web browser window titled "Vertical Billing and Support Portal" with a close button in the top right corner. Below the title bar is a header section with the text "Feedback Form" in orange. The main content area has a light gray background and contains the following elements: a message "We would love to hear your thoughts, concerns or problems so we can improve!", a "Name:" field with the value "Angelar bloodworth", an "E-mail:" field with the value "angelarbloodworth@yahoo.com", a "Feedback Type:" section with three radio button options: "Comments", "Bug Reports", and "Questions", and a large "Feedback:" text area. At the bottom of the form are two blue buttons labeled "Submit" and "Reset", followed by the text "status:".

Vertical Billing and Support Portal

Feedback Form

We would love to hear your thoughts, concerns or problems so we can improve!

Name: Angelar bloodworth E-mail: angelarbloodworth@yahoo.com

Feedback Type:

☐ Comments ☐ Bug Reports ☐ Questions

Feedback:

status:

Figure 17: Submitting Feedback Form

Recovering Your Password

If you lost or need help recovering your password, email service@vertical.com. They will manually reset your password for you. Make certain to include that you need to recover your password for your Customer Portal account. Include your name, email address, and company in your email.