

REBEL SOFTWARE · RebelPSA

Customer Portal Quick Start

Getting Started With Your Support Portal

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1. Welcome to Your Customer Portal

Your Customer Portal is a secure, online home base for everything related to your support relationship: opening and tracking support tickets, browsing help articles, viewing your devices, checking invoices, and more, with everything all in one place and available any time.

This guide is a quick tour to get you comfortable with the portal's main areas, and is organized so you can jump straight to the section you need.

Tip. *The exact look, logo, and color scheme of your portal are set by your service provider, so it may not look identical to the screenshots or descriptions your provider shares — but the areas covered in this guide work the same way regardless of branding.*

2. Logging In & Your Account

Your service provider will send you an email invitation to activate your portal account. The invitation includes a secure link to set your password and complete your first login.

- Open the invitation email and click the activation link.
- Set your password.
- Log in with your email address and new password.

Tip. *If you never received an invitation, or it has expired, contact your service provider and ask them to resend your portal invite — this is a one-click action on their end.*

Your Profile

From your account menu you can:

- Update your name, phone number, and contact preferences
- Change your password
- Enable multi-factor authentication (MFA) for extra account security — recommended

Important. *Never share your portal password with anyone, including someone claiming to be from your service provider. Legitimate support staff will never ask for your password.*

3. Your Dashboard

The dashboard is your portal's home screen — a quick summary of what's going on with your account, typically including:

- Your open and recently closed support tickets
- Quick links to open a new ticket, browse the knowledge base, or request a service
- Any announcements or notices from your service provider
- At-a-glance widgets your provider has chosen to show you, such as upcoming renewals or recent invoices

4. Support Tickets

Opening a New Ticket

- From the dashboard or the Tickets area, choose to create a new ticket.
- Describe your issue or request — a clear subject and a few sentences of detail will help your technician get started faster.
- Attach a screenshot or file if it helps explain the issue.
- Submit. You'll receive an email confirmation, and the ticket will immediately appear in your ticket list.

Tip. You can also open a new ticket the same way you always have, by simply emailing your provider's support address. It will automatically become a ticket and will show up in your portal right alongside tickets you create directly in the portal.

Tracking & Replying to Tickets

Your Tickets list shows every request you've submitted, with its current status and last update. Open any ticket to see the full conversation history and reply directly. Your reply reaches your technician the same way an email would, and their replies show up in the portal (and in your email inbox) as they happen.

- Filter your ticket list by status (Open, Pending, Resolved, etc.) to find what you're looking for
- Add a comment or attachment to an existing ticket at any time
- See a plain-language status for each ticket — you won't see internal-only statuses your technicians use behind the scenes

5. Knowledge Base

Your provider may publish self-service help articles — step-by-step guides, FAQs, and how-tos — to the Knowledge Base area of your portal. Use the search bar to find an article by keyword, or browse by category.

Tip. Knowledge Base articles are hand-picked by your provider for customer visibility — if you can't find what you're looking for, opening a ticket is always the right fallback.

6. Service Catalog

The Service Catalog is a menu of standard services or requests your provider has made available for self-service ordering (exp. requesting a new user account, ordering equipment, or requesting a project consultation). Browse the catalog, choose the item you need, fill in any requested details, and submit. Your request will become a tracked ticket just like any other.

7. Your Devices & Assets

If your provider manages devices on your behalf (workstations, servers, network equipment, mobile devices), the Assets area gives you visibility into what's on file for your organization. This can be by device, location, and, where available, a general health indicator per device. This view is read-only; if something needs attention, open a ticket referencing the specific device.

8. Billing & Invoices

The Billing area gives you a self-service view of your account's financials:

- View current and past invoices
- Make a payment securely online
- Review your payment history

Tip. Payments are processed through a secure, PCI-compliant (Payment Card Industry compliant) payment provider. Your card details are never stored directly by your service provider — RebelPSA's billing integration hands off directly to the payment processor for the transaction itself.

9. Training & Learning Center

If your provider has enabled it, the Learning Center offers short training courses — for example, security-awareness training or how-to guides for tools you use — that you or your team can complete directly within the portal, with progress tracked automatically.

10. Business Reviews

If your provider conducts periodic Business Reviews with you (sometimes called a Quarterly Business Review or an annual Strategic Review), a read-only summary of completed reviews — agenda, notes, and outcomes — may be available to you in the portal, so you always have a copy of what was discussed and agreed.

11. Notifications & Preferences

The portal will notify you by email as tickets are created, updated, and resolved. You can review and adjust your notification and contact preferences from your account settings at any time — including your preferred contact method and, if your provider supports it, your preferred contact hours.

12. Getting Help With the Portal Itself

If you run into trouble using the portal itself — logging in, finding something, or a page not behaving as expected — reach out to your service provider the same way you always would. A quick email or a ticket describing what you were trying to do is the fastest way to get help.

13. Quick Reference & Glossary

Term	Meaning
Ticket	A tracked support request or issue, from creation through to resolution.
Knowledge Base	A library of self-service help articles published by your provider.
Service Catalog	A menu of standard, self-service requests you can submit directly.
Asset	A device (computer, server, network equipment, etc.) your provider has on file for your organization.
MFA (Multi-Factor Authentication)	An extra login security step beyond just your password, such as a code sent to your phone or an authenticator app.
Business Review	A periodic (often quarterly or annual) check-in meeting between you and your provider, with a written summary.