



Customer Portal

Streamlined Ticketing

- Web and Desktop App: Customers can access your portal through their web browser or a customizable desktop application.
- Ticket Portal: Customers can submit tickets for problems and service requests.
- Ticket Management: Customers can view and comment on their tickets, customer management can view all tickets and approve end-user submissions.
- Custom Forms: Ask the questions you want to get all the information you need.
- Flexible Routing: Route tickets to any board or queue you need with any setting for statuses, types and more.
- Integrated CSAT: Customer satisfaction surveys built-in to the ticketing portal and easily added to outbound PSA emails.
- Microsoft Teams: Send selected tickets to Teams channels for you or your customers.
- Microsoft Flow: Create advanced workflows using Microsoft Flow webhooks or use Cloud Activ8 custom fields.

Service and Product Catalogue

- Service Catalogue: Feature the services you provide in an organized way that lets your customers know you do more than just deal with tickets.
- Product Catalogue: Define and promote the core products your company delivers for customer understanding and account manager consistency.
- Signature Support: Present terms of service and ask for a signature to streamline ordering of routine items.
- Approval Workflow: Ask company management or a defined list of approvers to approve requested items before you provision or start work.
- Solution Categories: Use Cloud Activ8's built-in 7 tier approach to solution selling that emphasizes customer needs rather than technology or create your own.

Automated Customer Reporting

- Dashboards: Summarize your customer information in customizable and easily scalable dashboard views for customers.
- Infrastructure Reporting: Provide asset information on endpoints, servers, applications and domains with information business owners want to know.
- Office 365 Reporting: Present Office 365 licensing, adoption reporting, tenant health and more without requiring access to the Office 365 Admin Center.
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- MFA Reporting: Deliver MFA reports for Office 365 users where available.
- Network Reporting: Integration presents network and device reports automatically.
- Customer Reports Presentation: Empower your customers to run easy-to-read, comprehensive and reports on their own with the simple click of a button.
- Mac Reporting: Integration pulls data in from all of your Mac endpoints.
- CSAT Reporting: Provide customers with feedback on service performance.
- Email Breach Reporting: Show customers emails that have been compromised and, where available, MFA protections to prevent issues.

- QBR Policy Reporting: Give customers real-time status information on your performance and the business policies that drive their I.T. investments.
- Email Report Archive: Send backup and other email reports to an online archive to reduce customer email volume and improve compliance.
- Change Reporting: Automatically show changes to Office 365 licensing and infrastructure.
- Warranty Reporting: Provide endpoint and server warranty reports with charting. Pulls warranty information directly from Dell and Lenovo and Cloud Activ8
- Training Reporting: Show customer management who has completed your integrated online courses.
- PDF Summary Reporting: Generate PDF report packages you can use to leave behind supported by online information.
- Software Reporting: Identify sales opportunities for out-of-date and EOL software with software reporting. Create planners cards for future discussion.

Account Management & vCIO

- Account Planner: Give your customers a roadmap with the vCIO Account Planner. It gets all of your customers and staff working in the same direction.
- One-Step Add: Add any problems you spot within your customer reports or dashboards to your customer's account planner for resolution.
- Meeting Tracker: Track meeting history and notes in one consistent place.
- Assessments: Gain insights and ensure compliance with fully customizable customer-facing assessments that form a record of compliance.
- Customer Scoring: Rank customers by your own metrics for project and product usage.
- Endpoint Mapping: Offer real-time location visibility to your customers. Display workstations and devices with the endpoint mapping tool.
- Sales Matrix: Track all of your core product offerings across customers without any additional effort.
- Planner Summary: Report planner items across customers to identify future growth options and activity pipeline.
- CSAT Rankings: Quickly track customer satisfaction by customer and by agent and get alerted to issues while problems are still in process.
- 365 Secure Scores: Review customer secure scores and details without having to log in to each customer's security centre.
- Sales Matrix Spreadsheet View: Quickly generate sales matrix reports from your planner online without downloading spreadsheets or PDFs.
- Quotes: Show quotes and provide access to quote PDFs and quote portal links.
- Agreements: Show active agreement and agreement balances.
- Certificate Management: Manage all of your domain certificates under a unified certificates report. Automatically track expiration dates

Integrated Marketing & Communications

- Messages: Deliver messages to customers based on company, type of company and/or user role.
- Daily Digest: One-click push of messages out to users in a daily digest delivered to users inboxes.
- Broadcasts: Push broadcast messages through the web or desktop application that can then be shown through messages and daily digests.

Increased Customer Productivity

- Courses Easy-to-use learning management is built-in so that you and your customers can create and track your own courses.
- Bigger Brains: Easily add-on over 100 integrated courses to deliver a superior training solution.

- Teams Integration: Provide enhanced customer portal accessibility with Cloud Activ8's Microsoft Teams integration.
- Quick Starts: Provide a library of PDF guides for common applications. Includes over 25 Office 365 documents.
- Company Intranet: Provide a full intranet app for your customers. Customers can add menus, articles, support items and more to their portal to make it their own.
- Knowledge Base: Provide content that reduces customer support calls and even link IT Glue documents.
- Application Launcher: Create customer and IT approved links to cloud applications and even local resources.
- Company Directory: Sync Office 365 and your PSA to create a clean company directory for your customer's use.
- Company Calendar: Customers can share Office 365 calendars easily to their staff with any effort by your team.
- Office 365 Updates: Provide users with the latest changes to Office 365 straight from the Office 365 message centre

Enhanced Service Productivity

- Office 365 Sync: Automatically update your PSA contacts from Office 365. Plus, end-users can update their own personal details.
- Support PIN Capture: Includes prompting users for a custom support PIN so that techs can verify remote user access to support.
- Office 365 Tenants: Get a recap of all of your Office 365 customers in one complete view.