

Sunco Hub Portal Training Guide

Introduction

This manual is designed to help users efficiently navigate and utilize the features of the new Sunco Hub Portal. Whether you are creating a ticket, managing requests, or tracking their progress, this guide provides step-by-step instructions to ensure a smooth and productive experience.

Overview

The Sunco Hub Portal serves as a centralized platform for managing support requests, tracking tickets, and accessing other essential tools. It ensures seamless communication with technicians, provides real-time updates on ticket statuses, and simplifies the process of resolving issues or implementing changes. Additionally, authorized users can access payment and invoice screens for billing purposes.

Objective

The objective of this training manual is to:

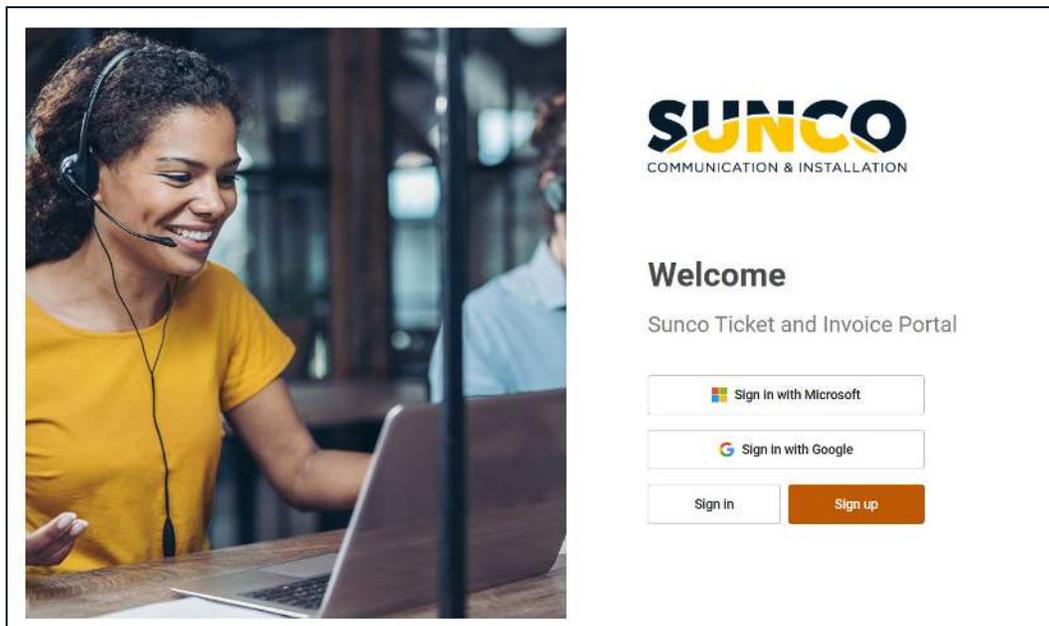
- Provide users with a clear understanding of the portal's features.
- Guide users through ticket creation, tracking, and communication processes.
- Ensure efficient use of the portal for issue resolution and request management.
- Highlight key responsibilities, such as assigning appropriate ticket priority levels.

Your Trusted Systems Integrator

Accessing the Portal

Log In

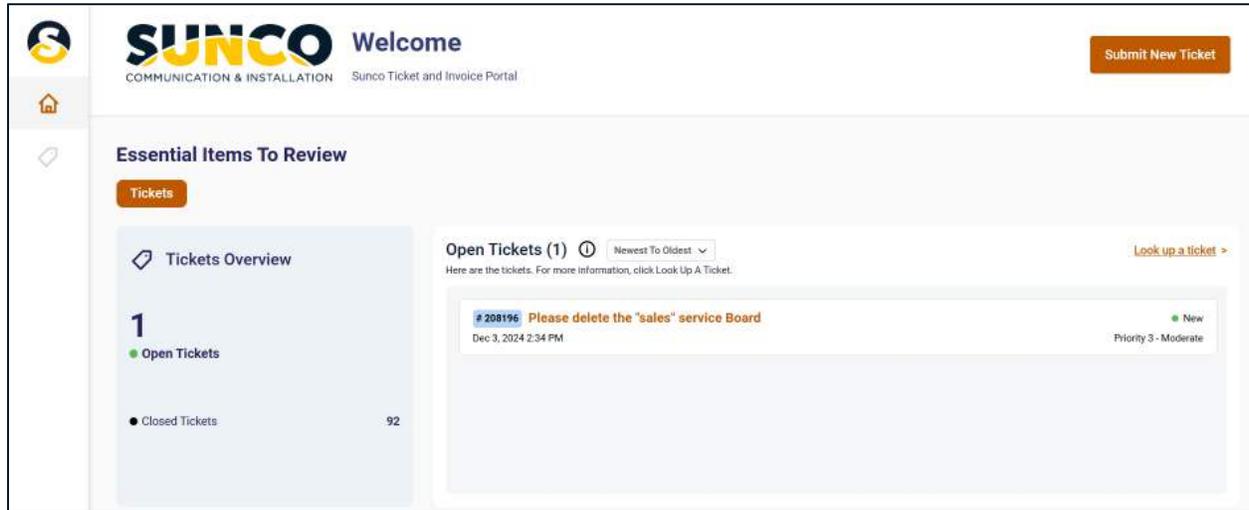
- Navigate to: <https://suncohub.myportallogin.com>
- Sign in with either Microsoft or Gmail based on your email.
- If neither of these apply you will need to “Sign Up”
- Enter your name, email address, and create a password (ensure this is not the same password as your Microsoft Account).
- Check your email for a confirmation message from ConnectWise.
- Click the confirmation link in the email to verify your account.
- Return to the portal login page.
- Enter your email and the password you created to sign in.



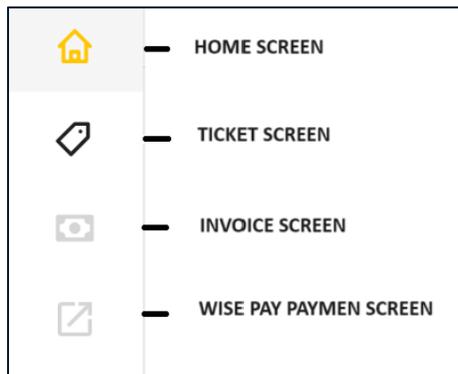
Note: The portal offers different access levels. While most users can create tickets, some functions may depend on your access permissions. Each owner or manager will be granted access to edit access of all employee users. This will no longer need to be done through our admin team.

Your Trusted Systems Integrator

Portal Main Page Overview



Navigation Menu: Find the **Navigation Menu** on the left side of the screen.



Note: The **Invoice/Payment Screen** will be only available to users with approved access.

Your Trusted Systems Integrator

Creating a Ticket

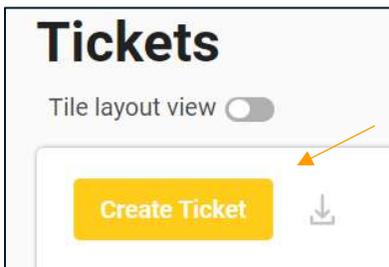
Option A: From the Home Page

1. Click **“Submit New Ticket”**.



Option B: From the Ticket Screen

1. Navigate to the Ticket Screen.
2. Click **“Create Ticket”**.



Option C: Email Service@sunco.ca (Alberta and BC) Or UCservice@sunco.ca (Eastern Clients)

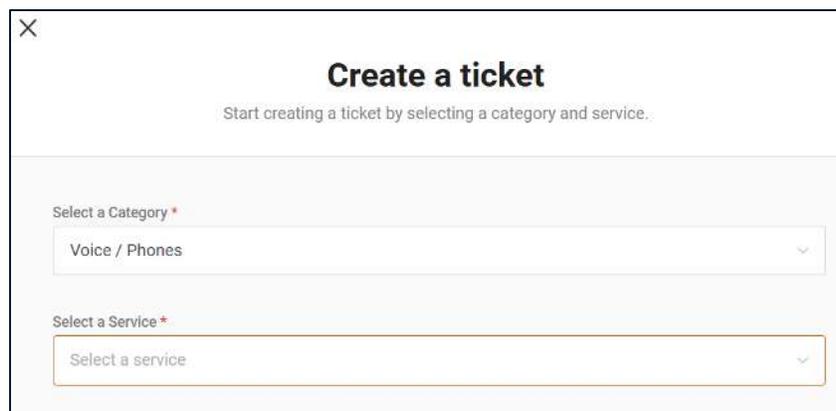
Make sure to include:

- Subject Line: A brief description of the ticket.
- Company Name, Region, and Location.
- Contact Information: Your name, direct phone (or cell phone), and email address.
- Initial Description: Specify if it's an issue, request, or incident.
- You will receive a confirmation email acknowledging the ticket.

Your Trusted Systems Integrator

Ticket Creation Process

1. Select a Category from the dropdown menu:
 - a. **Break Fix:** For anything broken or needing repair.
 - b. **Change/Request:** For changes such as phone extensions or new users.



The screenshot shows a web form titled "Create a ticket" with a close button (X) in the top left corner. Below the title is a subtitle: "Start creating a ticket by selecting a category and service.". The form contains two required dropdown menus. The first is labeled "Select a Category *" and has "Voice / Phones" selected. The second is labeled "Select a Service *" and has "Select a service" selected. Both dropdown menus have a downward arrow icon on the right side.

2. Click Next to proceed.
3. Complete all required fields marked with an asterisk (*).

Managing Your Tickets

- Once you receive a ticket number, go to the **Board** in the Portal to see active tickets.
- Click on the yellow ticket name to open it.
- Add updates or ask questions directly to the technician.

Essential Items To Review

Tickets Invoices

Tickets Overview

1
 Open Tickets
 ↑ 1 ticket added today

Closed Tickets 0

Open Tickets (1) Newest To Oldest [Look up a ticket >](#)

Here are the tickets. For more information, click Look Up A Ticket.

# 210765	(CENT) Central - Priority 4 - Low - Break/Fix - General question	←	Trige Priority 4 - Low
Jan 5, 2025 12:27 PM			

- Monitor live updates on ticket status and assigned technicians.
- You will also receive email notifications when ticket status changes on the portal.

TICKET #	SUMMARY	STATUS	TECHNICIAN
#210765	(CENT) Central - Priority 4 - Low - Break/Fix - General question	● Working on Ticket (W...	Veronica Schoenberger

Note: Priority Levels are displayed on each ticket. If you feel it needs to be escalated, you can message the technician assigned in the portal to advise.

Open Tickets (1) Newest To Oldest [Look up a ticket >](#)

Here are the tickets. For more information, click Look Up A Ticket.

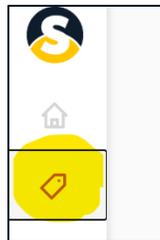
# 208196	Please delete the "sales" service Board	New
Dec 3, 2024 2:34 PM		
Priority 3 - Moderate		

Priority Status Meaning:

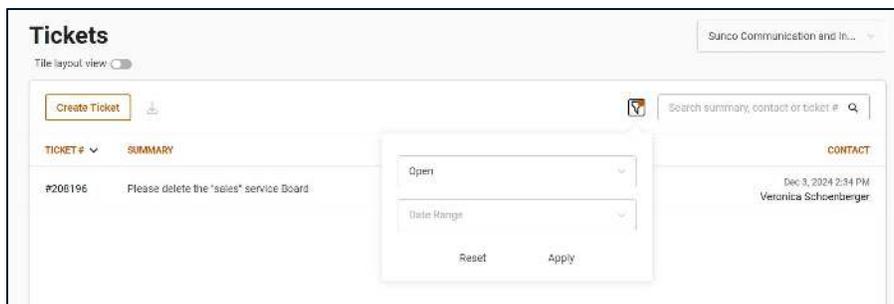


Note: You receive an email confirming ticket closure. Once the ticket has been closed and invoiced, it will be removed from your ticket screen.

You can search for open/closed tickets and review old tickets:



Click the ticket icon:



- You can filter your search based on open/closed or date range.

Challenges/concerns/questions please email: paymentportal@sunco.ca

Your Trusted Systems Integrator