



# Your guide to CONNECT 365

Accessing your services with Technology Services Group (TSG) couldn't be easier. CONNECT 365 puts you in control.

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# CONNECT 365

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The Connect 365 Portal represents a significant milestone in our commitment to delivering exceptional service and support to our clients. It is a comprehensive self-service platform that empowers our clients with convenient access to a wide range of resources, tools, and personalised assistance, ensuring a seamless and efficient experience throughout their journey with TSG. Combining the latest (AI) technology with our highly skilled team, key features of the client services portal include:

- **Incident Request Management:** Clients can easily submit and track incident requests, enabling faster response and resolution times when clients experience any IT issues.
- **Service Request Management:** Clients can easily submit and track service requests, enabling faster response times and improved communication between our team and our clients.
- **Personalised Dashboard:** Clients will have their own dedicated dashboard where they can access account information, track progress, and manage their incidents and requests effortlessly.
- **Knowledge Base:** A robust repository of articles, tutorials, and frequently asked questions will empower clients to find answers to their queries quickly, enabling self-help and reducing dependency on support teams.
- **Live Chat Support:** Real-time chat functionality will allow clients to connect directly with our support team for immediate assistance, ensuring prompt resolution of any issues or concerns.

# Why CONNECT 365?

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We don't want you to have to wait in a queue to be served, we want to deal with your request as quickly and securely as possible.

Connect 365 provides an intelligent platform for us to get you the right resources faster than ever before.

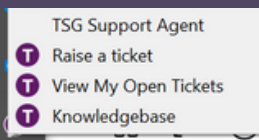
Connect 365 provides a number of benefits over traditional phone based services:

- **Putting you in control** – Connect 365 empowers you to decide how you would like to be served.
- **Self-Service** – You can self-serve using the Knowledge Base or the Chat facility to discuss your issues instantly.
- **Keeping you informed** – You can log on to the portal and see alerts and outages from 3rd Party Service Providers (Microsoft, Gamma, BT, Sage, Pegasus) regarding planned maintenance and unscheduled outages.
- If you have a problem and want to speak with one of our team to resolve it, you can log a ticket instantly. We will route your ticket directly to one of our specialist teams to address the issue and explain the fix.
- **Online Ordering** – If you have a request, if you need something new, or need to make a change to one of your services, you can log a request instantly. If that involves ordering new equipment, the order will be placed, dispatched and invoiced without the need to wait for quotes and paperwork to be processed.
- **Manage your services** – If you want to manage your licences, track the progress of tickets, or discuss an invoice, you can access it all instantly via the portal.

# Report an issue

If you are experiencing an issue with your IT that you would like us to fix then 'Report an Issue' by following four simple steps:

## Step 1

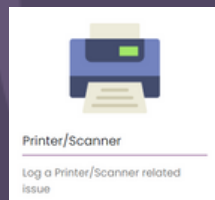


Right click the Purple T located in your system tray (near the clock)

Select 'Raise a ticket'

Or go to <https://connect365.tsg.com>

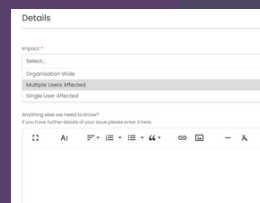
## Step 2



Select 'Raise an incident'

Select the type of incident you are having.

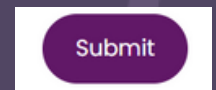
## Step 3



Let us know how many people the issue is effecting.

Enter any additional information you can.

## Step 4

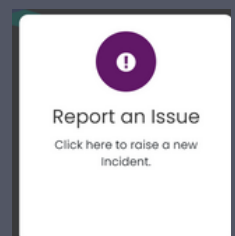


Click 'Submit'

That's it, it's that simple.. we will be in touch to let you know when you can expect it to be resolved.

### Helpful hints:

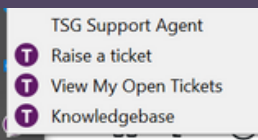
- **Save time** – If you have an internal email chain that contains important information that you would like to share with us, you can save the email and drag and drop the saved file when you are raising the incident.
- **Stay informed** – Before you log an issue you can check the alerts on the portal home page, if this is not the cause of your outage, you can raise a ticket directly from this page.



# Raising a request

If you need to raise a request for something new, like a new user set up, or a new piece of equipment or access to software, then you can do it by following four simple steps:

## Step 1

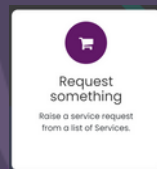


Right click the Purple T located in your system tray (near the clock)

Select 'Raise a ticket'

Or go to <https://connect365.tsg.com>

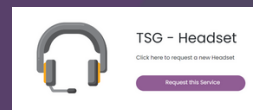
## Step 2



Select 'Request something'

Select the type of request you have.

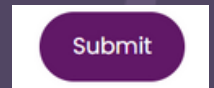
## Step 3



Click 'Request this service'

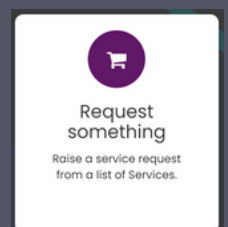
Enter any additional information you can.

## Step 4



Click 'Submit'

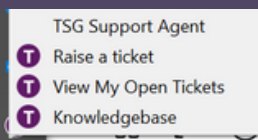
That's it, it is that simple ... we will be in touch in no time to resolve your issue.



# Tracking your tickets

If you need to track the progress of your ticket you can check Connect 365 in three simple steps:

## Step 1

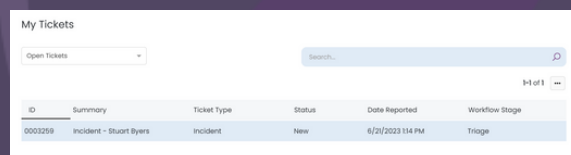


Right click the Purple T located in your system tray (near the clock)

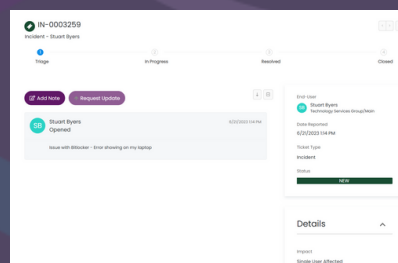
Select 'View my open tickets'

Or go to <https://connect365.tsg.com>

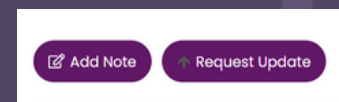
## Step 2



You will see a list of all your open tickets  
If you 'double click' the ticket you can see the full detail of the ticket.



## Step 3



If you double click the ticket you can see the ticket status, request an update or add a note directly to the ticket at any time.

You can also book time to speak to one of our experts.



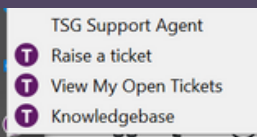
### My tickets

View your open and recently closed tickets, and view their progress or update them.

# Using Knowledge Base

There may be occasions where you don't even need to log a ticket with us to resolve an issue. You can take a look at some of the most common IT issues in our Knowledge Base and apply a fix yourself by following the easy to understand instructions.

## Step 1

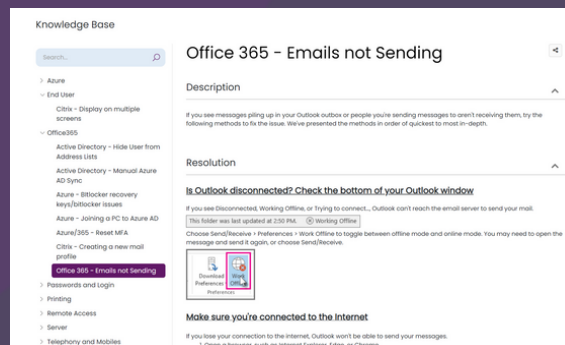


Right click the Purple T located in your system tray (near the clock)

Select 'Knowledge Base'

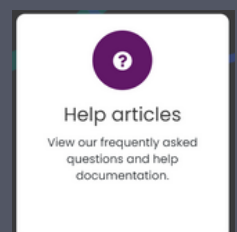
Or go to <https://connect365.tsg.com>

## Step 2



Once you are in the portal you can search across all articles using the search box in the top left corner of the screen.

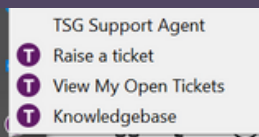
Alternatively, you can use the 'Topic' types down the left of the screen and manually search articles which have step-by-step instructions for issue resolution.



# Want to chat?

If you are struggling to find what you need in the portal and the search function is not bringing up the information you are looking for, you can easily contact us via 'Live chat' on the Connect 365 portal.

## Step 1

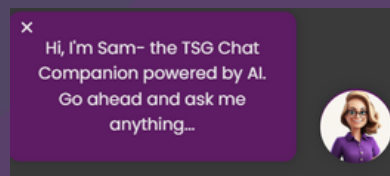


Right click the Purple T located in your system tray (near the clock)

Select 'Raise a ticket'

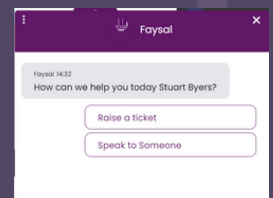
Or go to <https://connect365.tsg.com>

## Step 2



When you access the portal, click the Chat icon that will appear in the bottom right of the screen.

## Step 3



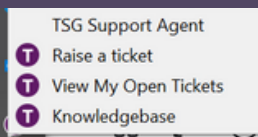
You can then begin your Chat to resolve your issue.



# Got a finance query?

Need to address a billing query or have a question about an invoice, licences or other finance related query?

## Step 1

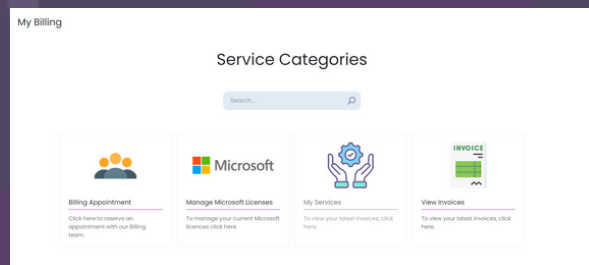


Right click the Purple T located in your system tray (near the clock)

Select 'Raise a ticket'

Or go to <https://connect365.tsg.com>

## Step 2

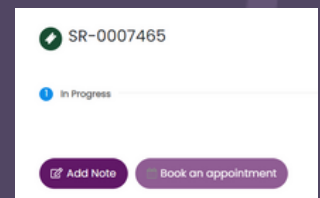


Select 'My Billing'

Select the type of query you have.

Once you have selected your query type you can book a convenient time to speak to one of our finance team. Manage your Microsoft Licences or request to see your invoices.

## Step 3



Enter the details of your query and once submitted you can book an appointment to speak with an expert using the online booking form.



### My Billing

View recent invoices and current subscription services, amend current Microsoft subscriptions or book an appointment with one of our billing team.

# No need to call

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Connect 365 is designed to provide you with a more secure, more productive way of accessing your TSG services.

There is no more waiting in a queue to be dealt with, or listening to recorded messages. Simply raise a ticket in the Connect 365 portal (<https://connect365.tsg.com>).

If you do need to call, we have issued all primary contacts with a secure PIN code which can be used to access our main phone number. This has been issued to primary contacts and will be updated regularly via Connect 365. Simply follow the instructions and we will put you through to a member of our team to deal with your query.



# ...and what else?

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Connect 365 is accessible using Single User Sign-on (SSO) making raising a ticket easier than ever but even if you can't log on using SSO you can still access the portal to raise a ticket.

If your primary device (laptop/desktop) is out of action, you can access the portal via any internet connected smart device to log a ticket or start a chat with one of our team.

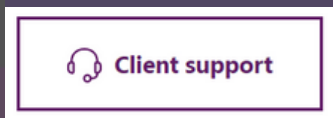
In the unlikely event that you are unable to access any online services due to a major connectivity outage effecting (4g/5g) phone and online broadband networks, and you don't have a secure PIN to call our main number. You can get in touch with your Client Success Manager or Client Director.

Access to purchase goods and services via Service requests will be limited to authorised users only. This will stop goods and services being purchased without your knowledge.

# Trouble Logging in?

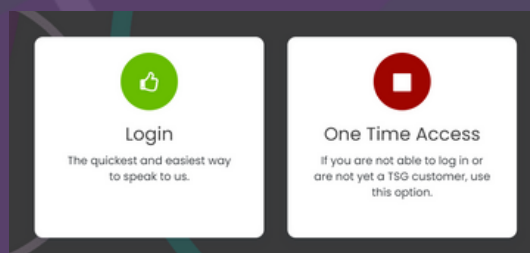
Connect 365 is accessible using Single User Sign-on (SSO) but if SSO is not enabled on your account, or you experience any difficulties logging in, you can still gain access to the portal and log tickets.

## Step 1



Go to [www.tsg.com](http://www.tsg.com) and click on the 'Client support' button in the top right of the screen.

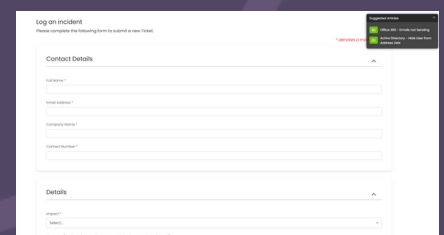
## Step 2



From the Portal you will be able to select the 'one time access button'.

If you do have SSO enabled you should click the login button and you will be directed in to the portal

## Step 3



If you click the 'One time' access button you will be presented with a form to complete and your ticket will be logged with us.

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*“Our new Connect 365 Portal marks a significant step forward in our commitment to providing exceptional service to our clients. We understand the importance of empowering our clients with the tools and resources they need to succeed. With this new portal, we aim to deliver a secure, seamless, and personalised experience that streamlines their interactions with us, saves them time, and ultimately enhances their satisfaction. The Connect 365 portal will help us to deliver on our commitment to a +90 net promoter score.”*

Rory McKeand (Technology Services Group – CEO)

