



AllSafelT

Client Manual





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About AllSafe IT

Welcome to the AllSafe IT family!

AllSafe IT is an IT services, consulting, and support firm with a dedicated team of certified technology experts and a client base spanning a wide range of industries.

Our services are custom tailored to ensure that your business not only survives, but thrives.

Our belief is that true partnerships are built from the results of actions – which is why we are firmly focused on making sure you experience uptime, all the time. It's a simple promise, but it means a lot – and it's the fulfilment of this promise that's made us the partner of choice for our clients.



Our Mission & Values

AllSafe IT's mission is to make downtime obsolete - so you can focus on your business.

Our values are deep principles and standards for how we conduct our business. They are more than bullet points, they are what we live by each and every day:

- ✓ Good Character
- ✓ Deliver WOW
- ✓ Pursue Growth
- ✓ Create Fun
- ✓ 100% Teamwork

AllSafe IT Tools

All computers onboarded by AllSafe IT include installation of AllSafe IT tools, security platform, and the AllSafe App. Here's a quick breakdown of what each tool does:



Remote Monitoring and Management (RMM): The RMM tool is our hero app for proactive IT management. RMM allows us to detect potential issues before they become a problem; automate system maintenance tasks; perform patch management; and provides analysis and reporting so we can make strategic IT recommendations.



Remote Access: These tools allow our technicians to provide support by remotely connecting to your computer. As a best practice, make sure to save and close any confidential documents before we connect. We will never connect to your computer unattended unless expressly authorized in writing.



Endpoint Protection: Our security platform blocks and neutralizes threats like viruses, malware and ransomware.



AllSafe App: Your one-stop portal to AllSafe IT. More on this on the next page...



The AllSafe App

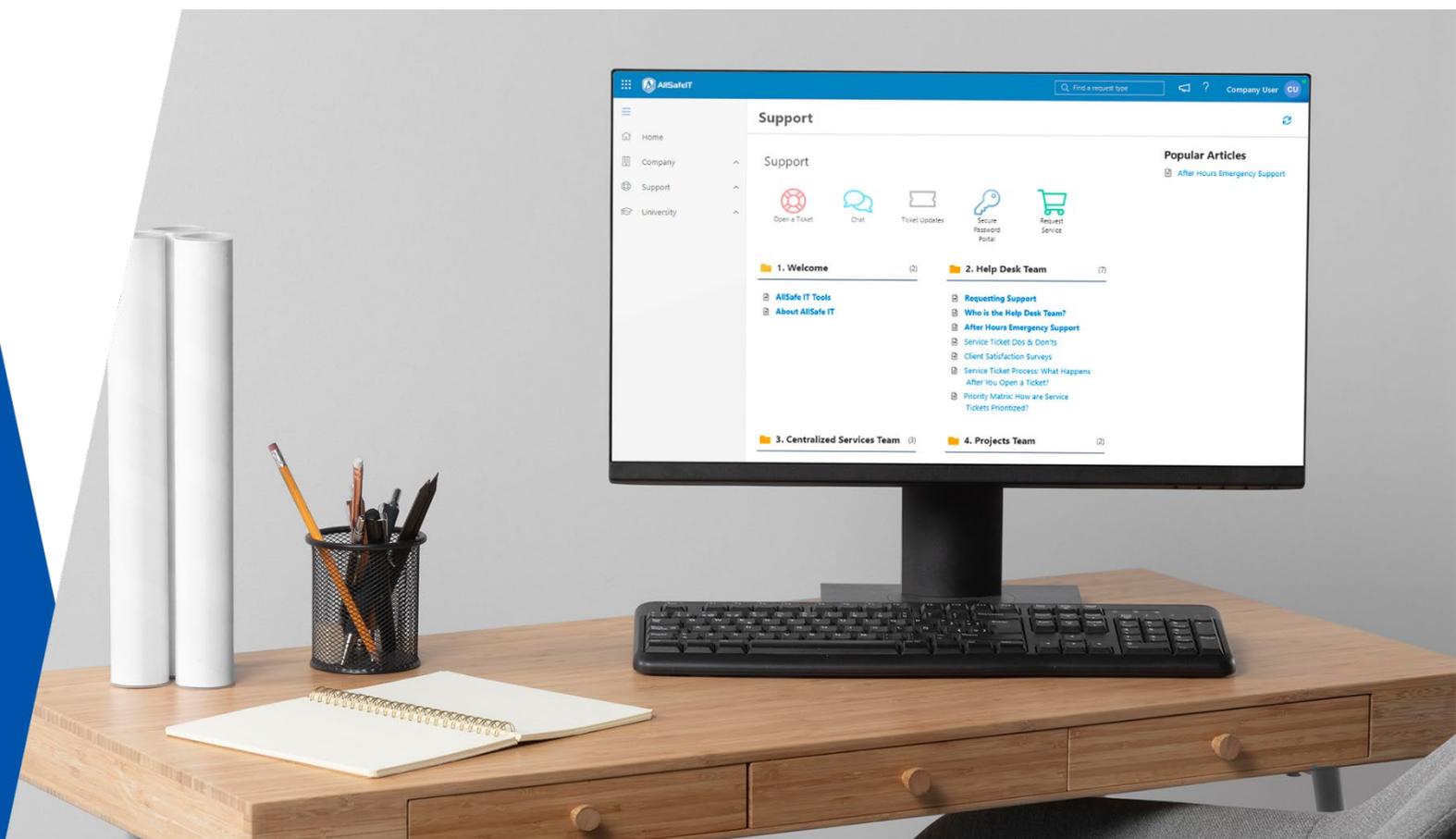
All standard company users can use the AllSafe App to:

- ✓ Open a ticket
- ✓ Chat with a technician for real-time support
- ✓ Request hardware or service (pending approval)
- ✓ Check the status of existing tickets
- ✓ View the AllSafe IT Knowledge Base
- ✓ Access Office 365 Training content

Additionally, users designated as company admins can also use the AllSafe App to:

- ✓ View and approve tickets and quotes
- ✓ View and pay invoices
- ✓ View IT strategic plan
- ✓ View and download reports on your company's infrastructure, Microsoft 365 usage, security, compliance, and more

* For step-by-step guides, refer to the **Using the AllSafe App** section of this manual, starting on page 30.



Service Teams

AllSafe IT is comprised of several dedicated teams that work together to ensure your company's success.

Our **Help Desk** team is your go-to team of technicians who provide friendly and responsive assistance for reported IT issues.



Our **Centralized Services** team proactively monitors and maintains your network in the background, so you won't even know we're there.

Our **Projects** team of highly skilled engineering resources implements new critical business systems on time and under budget.



Your **Virtual Chief of Information Officer (vCIO)** will provide you with a unique roadmap to align your IT strategy with your short- and long-term business goals.

Our **Quote Desk** team assists with purchasing new hardware, software or services.



The Help Desk Team

Most of your interactions with AllSafe IT will be with our Help Desk Team.

The Help Desk is your first point of contact for the majority of technical support needs. These are your go-to technicians for everything from password resets and printer installs, to server outages and suspected malware attacks.

Our friendly and responsive Help Desk technicians provide support remotely or on site as needed.

- ✓ 24/7/365 Help Desk support
- ✓ Remote support via app, email, chat or phone
- ✓ On site support at your location
- ✓ Emergency support available after hours



Service Ticket Dos

When opening a ticket, provide as much detail as possible. This will help eliminate back and forth information gathering and allow us to resolve the issue faster. Try to provide the following info:

- ✓ A detailed description of the issue
- ✓ Any troubleshooting steps you have already attempted
- ✓ How long you have had the issue
- ✓ How many people in your organization are experiencing the issue
- ✓ The name of the affected system(s)
- ✓ A contact name and phone number, especially if you are submitting a ticket on someone else's behalf



Service Ticket Don'ts

There are many ways to contact AllSafe IT, but not all of them are effective ways to request support.

- ✗ Don't submit a request with no background info. A ticket that only says "HELP!" will require us to spend time gathering information and will take longer to resolve.
- ✗ Don't send multiple emails for the same issue; please give us some time to respond.
- ✗ Don't contact your favorite technician directly. You may be interrupting them as they work on another ticket.
- ✗ Don't send service requests to emails that are not **helpdesk@allsafeit.com**. All requests should go through our ticketing system to ensure that they are properly documented.

The Service Ticket Process

What happens after you open a ticket?

1 A ticket is created and an email is automatically sent to you with your ticket number

2 Our Help Desk Coordinator triages your ticket and sets the priority based on its impact and urgency

3 Our Help Desk Coordinator then assigns a technician and schedules your ticket based on priority

4 A Help Desk Technician contacts you at the scheduled time to work on the issue

5 If the ticket requires escalation to a manager or a higher-level technician, the ticket is escalated

6 The ticket is resolved and closed

 Make sure to respond to the client satisfaction survey to let us know what we can do to improve

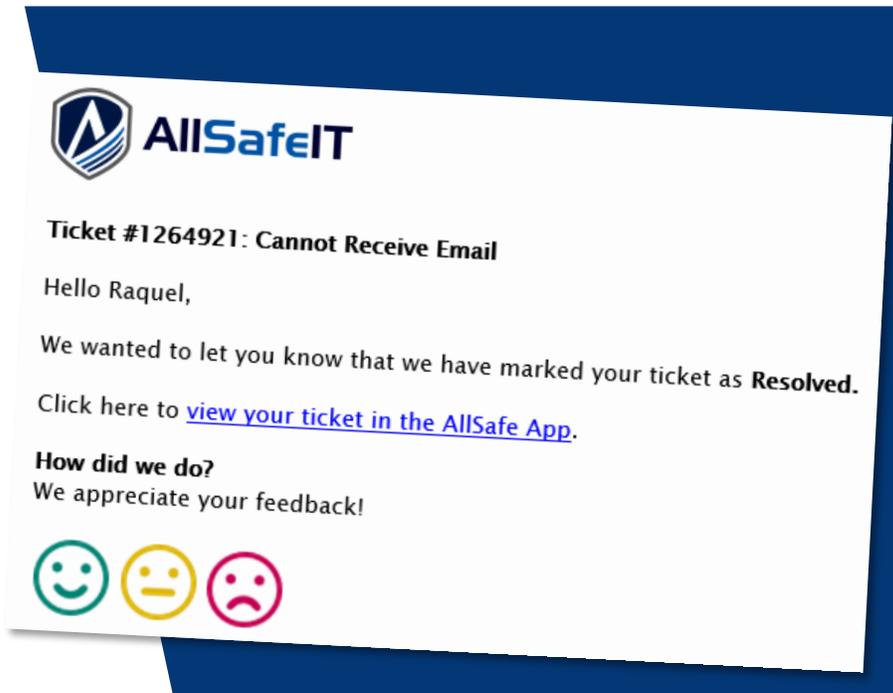
Client Satisfaction Surveys

At the close of each support ticket, you'll receive an email with a 2-question survey asking how we did.

1. Click the icon that most represents your experience:

-  Positive
-  Neutral
-  Negative

All it takes is a single click to let us know how you felt about the ticket.



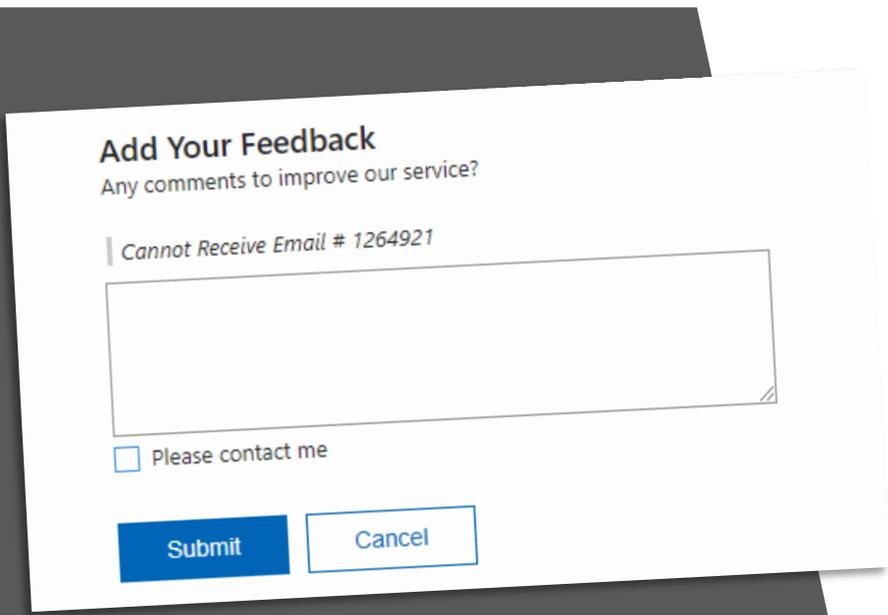
2. Leave a Comment (optional)

It only takes 30 seconds to provide further feedback – especially if you were not satisfied for any reason.

This lets us know what we're doing right and, more importantly, where we can improve. We take your feedback seriously and read every comment.

If you would like us to contact you, check the **Please contact me** checkbox.

NOTE: If you have another issue or request, please do not enter the new request here. Instead, submit a new ticket using the **AllSafe App** or by emailing helpdesk@allsafeit.com.



After Hours Emergency Support

IT problems can happen when you least expect them, so we offer after hours emergency IT support 24 hours a day, 7 days a week for Managed Services clients.

We value your business and every ticket is important to us. However, some tickets are considered a "Priority 1 Emergency" based on the following:

- ✓ A large group of users or a whole department or the entire company is affected AND
- ✓ Major business processes are stopped.

If your request qualifies for after hours support based on the above criteria, follow these steps:

1. Call our support hotline at **(888) 400-2748**
2. Notify the dispatcher that your request is urgent, and you require emergency support
3. A technician will create a ticket and immediately work towards a resolution of your issue
4. A senior technician will always be on call in case the issue requires escalation.

Do NOT send after hours emergency requests via the AllSafe App or via email.

These requests are processed differently and will be resolved during regular business hours.

Priority Matrix



Service Tickets are dispatched based on priority. The more urgent the issue, the sooner it is dispatched.

Service tickets are prioritized based on:

- **URGENCY** (how many people are affected)
- **IMPACT** (how severely work is impacted)

For example, if an entire company is unable to work because their server is down, this would be prioritized as a P1 and assigned to a technician immediately.

If a person is unable to delete a shortcut from their desktop, it may be annoying but doesn't hinder their ability to work. This would be considered a P4 and may be scheduled the following day.

URGENCY

	High <i>Entire company is affected</i>	Medium <i>Entire Department/Large Group Is Affected</i>	Low <i>One User/Small Group Is Affected</i>
High <i>Business Cannot Operate Correctly</i>	P1: Urgent/Emergency	P2: Quick Response	P2: Quick Response
Medium <i>Performance Degraded But Workarounds Are Possible</i>	P2: Quick Response	P3: Normal	P3: Normal
Low <i>Not A Pressing Problem</i>	P3: Normal	P3: Normal	P4: Extended

IMPACT

Technical Owner (TO)

The help desk team will have a working knowledge and access to documentation of your company's IT environment.

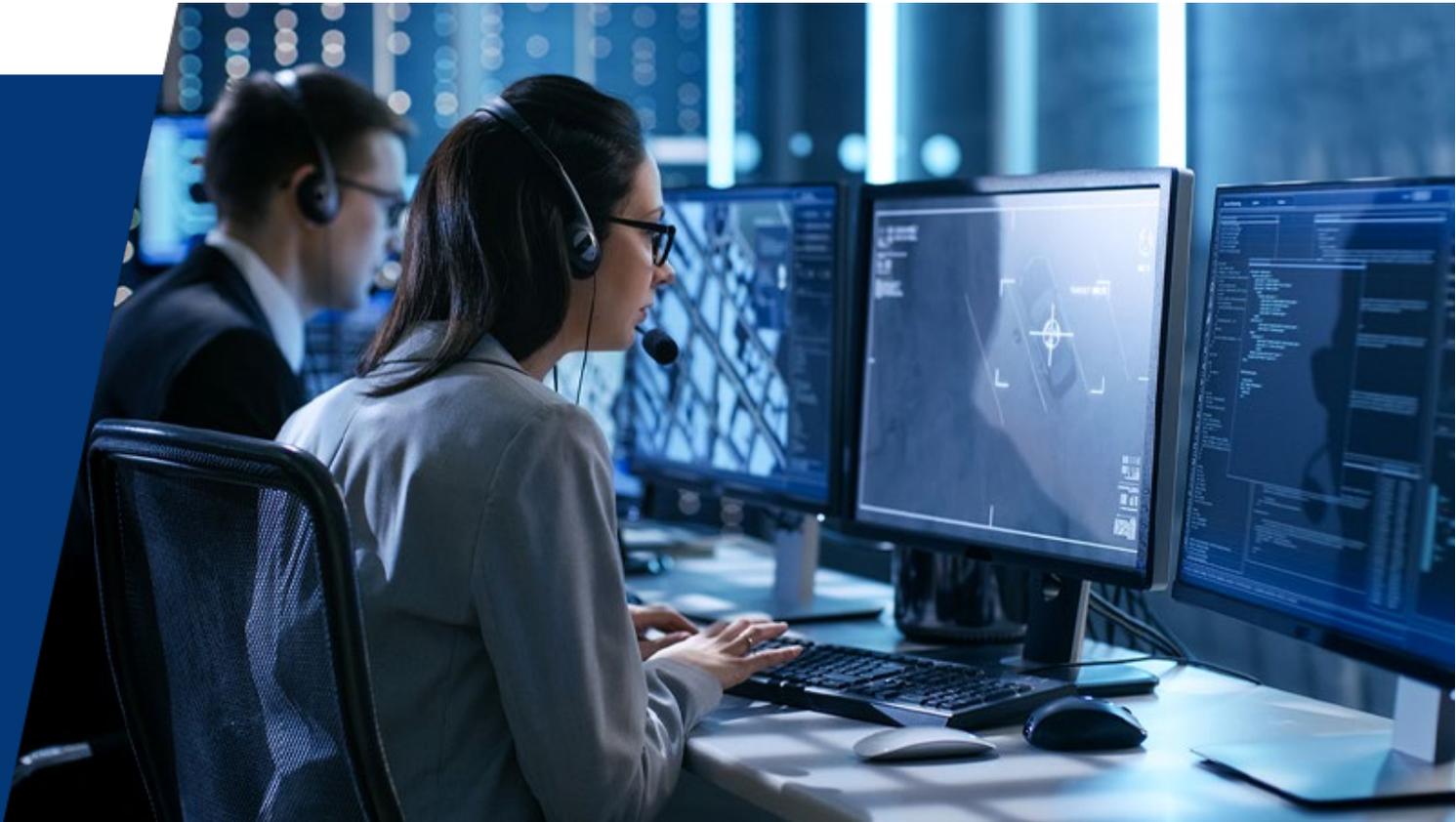
However, your company's Technical Owner (or TO) is a senior Help Desk technician designated as the subject matter expert for all things related to IT at your company. Your TO is intimately familiar with your IT environment and infrastructure and is responsible for maintaining documentation.

Your company's TO:

- ✓ Is involved in all problem management (recurring issues) activities
- ✓ Works closely with our Projects Team to ensure that their knowledge (and documentation) is always up to date with the latest changes
- ✓ Maintains and updates all IT documentation related to your company



* Please note that the Technical Owner role is different and separate from the vCIO role. While your TO is the expert on the technical aspects of your company, your vCIO will be your primary contact to discuss business IT strategy, relationship, and account-related issues. For more on the vCIO role, refer to the vCIO Team section beginning on page 24.



The Centralized Services Team

Our Centralized Services team helps make downtime obsolete by monitoring the performance and health of your IT systems.

When threats and anomalies are detected, we proactively resolve them before they can become a full-blown problem. This is all taken care of behind the scenes, so most of the time, you'll never even know there was an issue.

- ✓ Monitor IT infrastructure, servers and computer networks
- ✓ Intercept and neutralize potential security vulnerabilities and threats
- ✓ Analyze events and respond appropriately
- ✓ Perform routine maintenance to ensure systems are patched and up to date

The Event Ticket Process

1

IT systems are continuously monitored by AllSafe IT's remote monitoring and management tools

2

If an issue is detected, an event ticket is automatically generated in AllSafe IT's system

3

Event tickets are automatically prioritized based on the alert type

4

The Centralized Services team works on and resolves event tickets by priority

Scheduled Maintenance

Occasionally, some event tickets (as well as some help desk tickets and projects) may require us to perform tasks that can impact your ability to access IT systems. The most common example of this would be a server that requires a reboot after updating.

Users will be notified of scheduled maintenance ahead of time via email. These notifications are sent to our primary contacts and advise users of the maintenance time window, the affected systems, the expected impact and end user action required.

Make sure to pay attention to any end user action required. Work or data loss may occur if end user action is not followed.



Dear Vangie,

We are performing scheduled maintenance on your network that will impact your business. Please review the details below.

MAINTENANCE DETAILS

Maintenance Window	04/01/2025 11:00 PM to 11:59 PM
Systems Affected	SERVER-RPDR
Machine Type	Server
Reason for Outage	Application Maintenance
Expected Impact	Domain & Active Directory Services will not be available during the reboot
Action Required	No end user action required

If you have any questions, please send an email to helpdesk@allsafeit.com and we will get back with you shortly.



AllSafe IT Support Team

phone: (888) 400-2748
 online: www.allsafeit.com

Here's an example of a Scheduled Maintenance notification

The Projects Team

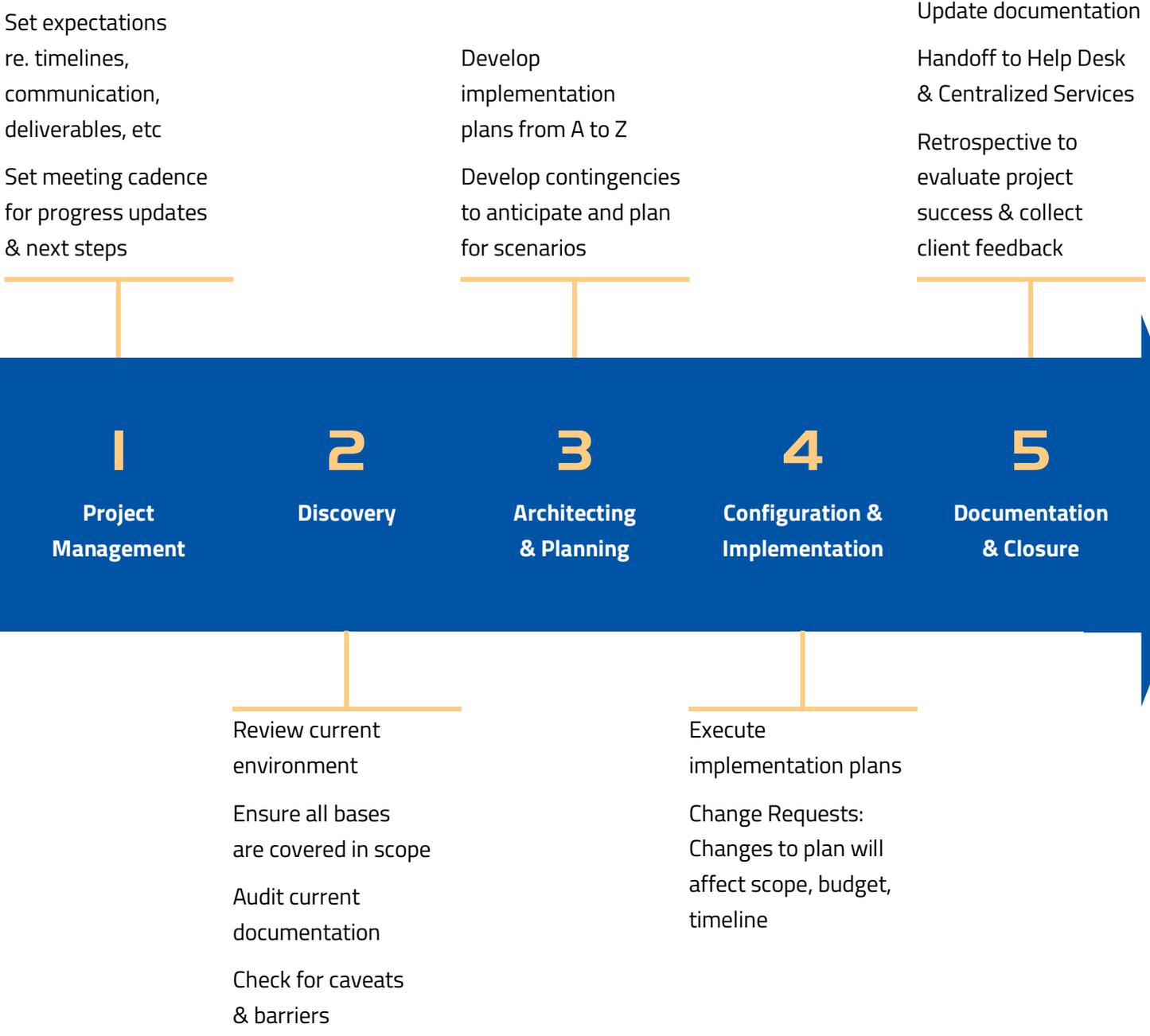
Our Projects team of highly skilled engineering resources will plan, install, migrate and upgrade critical business systems and data within your IT environment.

This is all carefully planned and communicated to set expectations, ensure project timelines, and stay within your budget.

- ✓ **Security:** Penetration Testing, Security Awareness Training
- ✓ **Equipment:** Servers, Firewalls, NAS, Workstation Refreshes, Rack Cleanups
- ✓ **Software:** Line of Business Application Implementation & Upgrade, Office 365
- ✓ **Network:** Network Buildout, Wireless Optimization, Cloud Migrations
- ✓ **Compliance:** HIPAA Assessments, PCI-DSS Assessments, Gap Analysis
- ✓ + Office Moves, Voice Migrations, more...



The Projects Process



When a Ticket Becomes a Project

Occasionally, you may submit a helpdesk ticket that must be escalated into a project. This escalation will be based on several factors that measure the complexity, scope, and impact of the request.

AllSafe IT uses the criteria described below to determine when a ticket should be a project. The more factors on either side will “tip the scale” to whether the request should be a ticket or project.

TICKET

PROJECT

Hardware or Software version will be changed incrementally (e.g., 13.1 to 13.2)	Version Change	Hardware or Software will be changed a full version number (e.g., 12 to 13)
1 or 2 Users or Systems will be affected	Users/ Systems Affected	3 or more Users or Systems will be affected
Performance may be degraded but workarounds are possible	Risk of Disruption	Business will not be able to operate for 15 minutes or more
Minimal to no training will be required	End User Training	End User Training will be required
1 Technical Resource will be needed	Resources	2 or more Technical Resources will be needed
Simple task list will be needed	Procedural Steps	A hierarchy of steps with multiple phases will be needed
Will require less than 8 hours to complete	Hours	Will require 8 hours or more to complete





The vCIO Team

Your Virtual Chief of Information Officer (vCIO) provides you with a unique roadmap to align your IT strategy with your business goals, both short- and long-term.

Your vCIO oversees your entire IT infrastructure to encompass current needs while simultaneously anticipating and planning for innovation and growth. This ensures that the business IT systems we architect are ultra-resilient and future-proof.

Hierarchy of Needs

Our approach to IT strategy is loosely based on Maslow's Hierarchy of Needs. We have adapted Maslow's concept to apply to business needs.

The most fundamental needs (survival) at the bottom of the pyramid must be met before higher-level needs (growth) can be achieved.

Self-Actualization

Desire to become the most that one can be

Advanced

Artificial intelligence, business intelligence

Esteem

Respect, self-esteem, status, recognition, strength, freedom

Nice To Have

Automation, data governance

Love & Belonging

Friendship, intimacy, family, sense of connection

Essential

Line of business applications, collaboration & productivity apps

Safety

Personal security, employment, health, property

Required

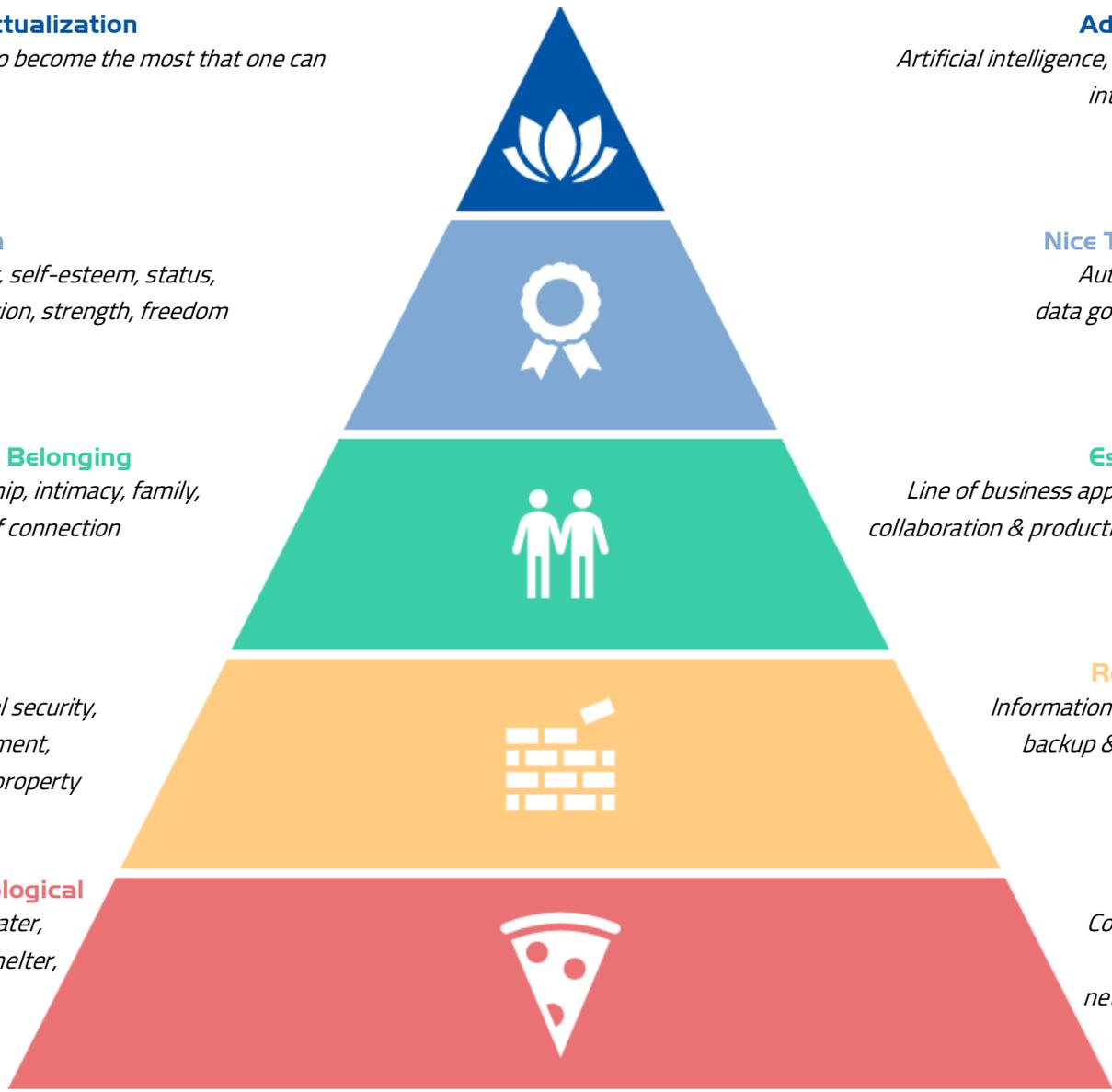
Information Security, backup & disaster recovery

Physiological

Food, water, sleep, shelter, clothing

Basic

Computers, servers, networking, power



The vCIO Process



Meet regularly with your vCIO in recurring sessions to discuss short- and long-term business goals

We assess the status of each IT business system and how well they align with your goals

We develop a remediation plan to close the gaps and strategically deploy the chosen business alignment systems

Your Remediation Plan

The AllSafe App displays your Remediation Plan over the next 4 quarters. Our recommended projects and services are shown as “cards” which can be drag & dropped into the appropriate quarter for scheduling.

With Company Admin access:

1. Click **Account**
2. Click **Remediation Plan**
3. Click on any item to view additional details

The Quote Desk Team



Our Quote Desk team assists with purchasing hardware, software or services.

You can request a quote any time you need to purchase or upgrade IT products. Occasionally, we will also send quotes based on our teams' recommendation to optimize and upgrade your IT systems.

Purchasing Through AllSafe IT

Before you make any decisions regarding your technology, it is always a good idea to speak to your vCIO or someone from our support team first.

There are many factors to consider. For example:

- ✓ Is the new technology compatible with your current network and systems?
- ✓ Is the solution scalable with your short- and long-term business goals?
- ✓ What level of support will you need with the new equipment? Is it covered under manufacturer warranty?

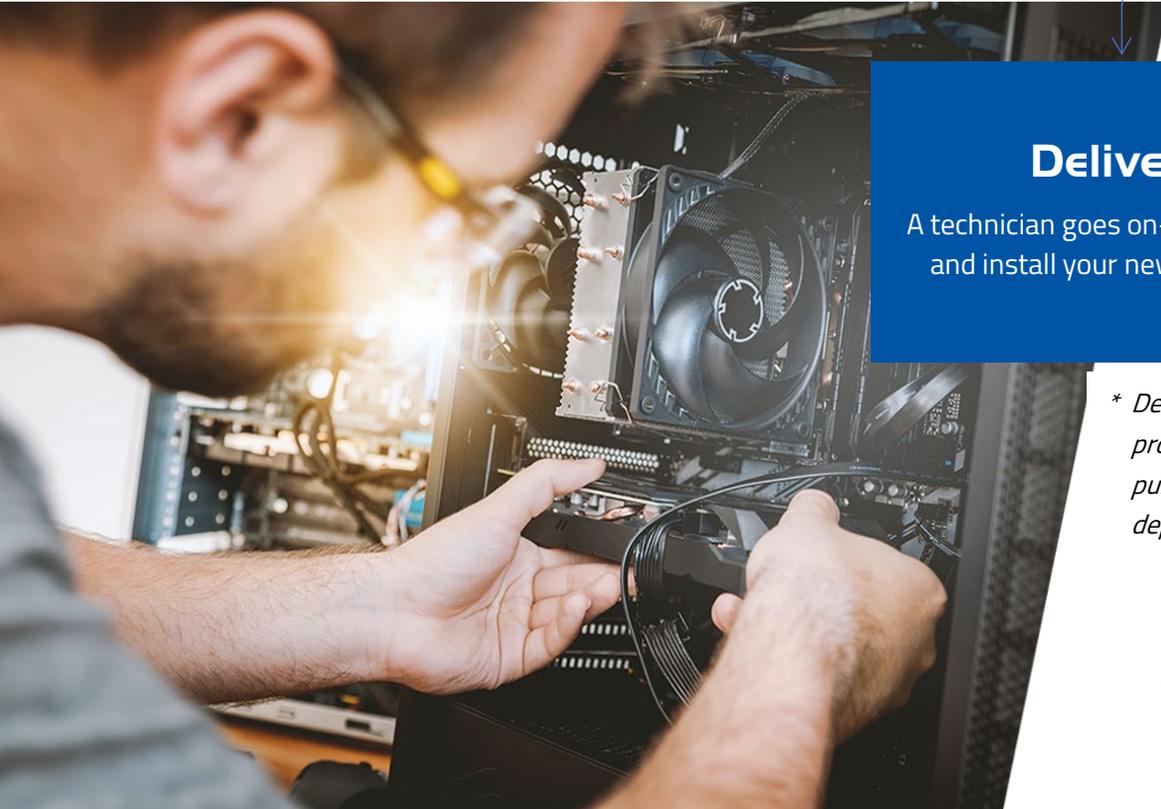
* *Step-by-step guide on how to view and accept quotes in the AllSafe App on page 53.*

Why do all the research yourself? Let your highly knowledgeable vCIO provide you with exactly what you need. Our expertise and experience mean we know which products are the most cost effective and deliver the best results.

AllSafe IT takes your entire existing network as well as your future business goals into careful consideration when creating a proposal.

Also, purchasing through AllSafe IT ensures that we have complete and accurate documentation of all of your assets.

The Delivery and Implementation Process



** Depending on the product, some purchases may be deployed remotely*

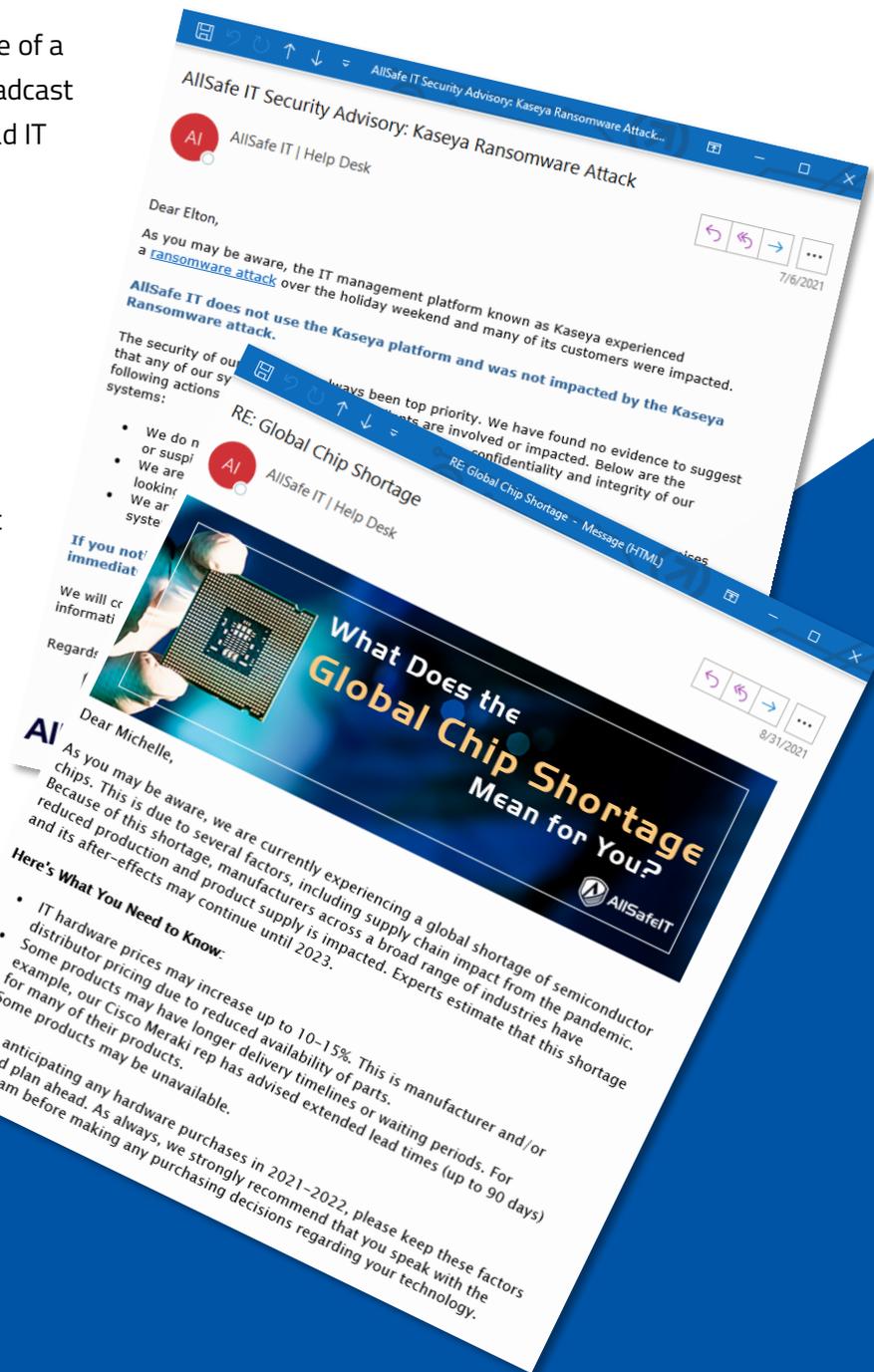
Global Notifications

You may hear from us from time to time outside of a service ticket. AllSafe IT occasionally sends broadcast messages to clients in the event of a widespread IT issue that affects many.

Some examples of this would be:

- ✓ A global Internet or service outage (e.g., Microsoft or Adobe)
- ✓ A widespread security threat or advisory
- ✓ A global supply chain issue that may affect your ability to procure equipment

Depending on the nature of the message, these notices may be sent to all users at your company, or only to our primary contacts.



September 2021



SafeBytes

Your monthly tech & security news roundup

Cady, the weather is finally cooling down and pumpkin spice *everything* is back on the menu! As we head into autumn, we're covering the global chip shortage, the T-Mobile data breach, and email fatigue.



T-Mobile Confirms Unauthorized Access to its Data Occurred

In August, T-Mobile confirmed a cyberattack on their systems that exposed the names, social security numbers, dates of birth and driver license info of over 50 million current and former customers. Our blog post covers the events as they unfolded and our recommendations.

[READ: T-Mobile Data Breach](#)



Is Email Fatigue a Security Risk?

Take a peek at your work inbox. How many unread messages do you have: hundreds, maybe even thousands? People with overflowing inboxes may be more likely to expose themselves to ransomware, malware and phishing. Read our blog post to learn more

SafeBytes Newsletter

Each month, we send an email newsletter rounding up what's new and relevant in the world of technology and cybersecurity.

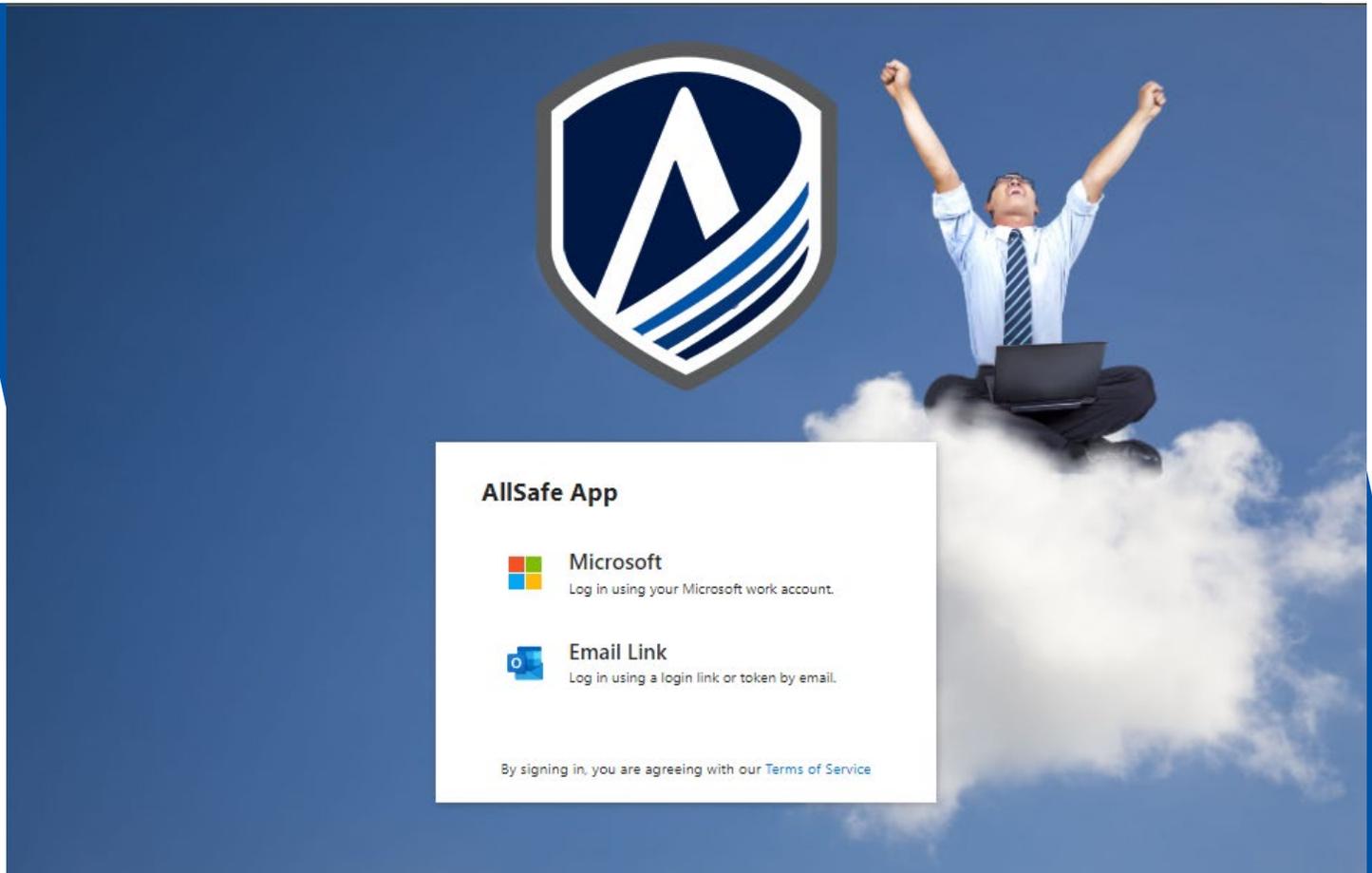
Look for it in your email inbox on the first Thursday of each month.

Social Media

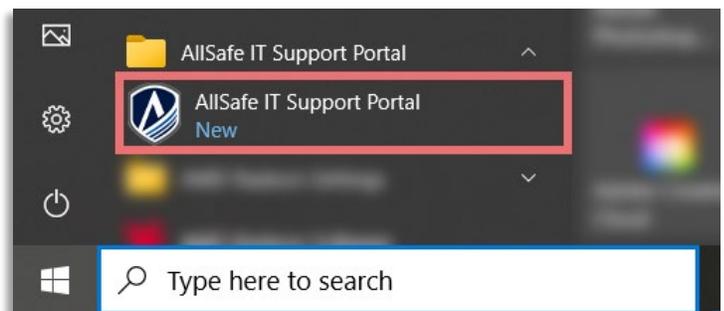
If you'd like to see our stories as they happen, follow us on social media.

-  @allsafe-it
-  @allsafeit
-  @allsafeit
-  @allsafeit

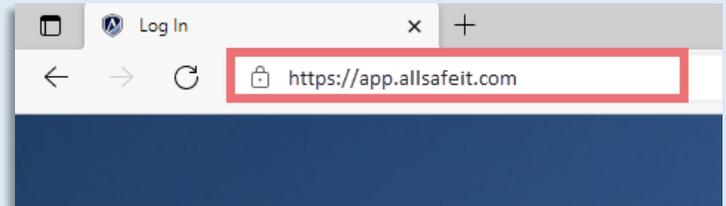
Logging In to the AllSafe App



1. You can open the AllSafe App on your desktop or browser.
 - a. **Desktop** (Windows only): Use the start menu to navigate to **AllSafe App**
Note: The desktop app will automatically attach a diagnostics report from the computer

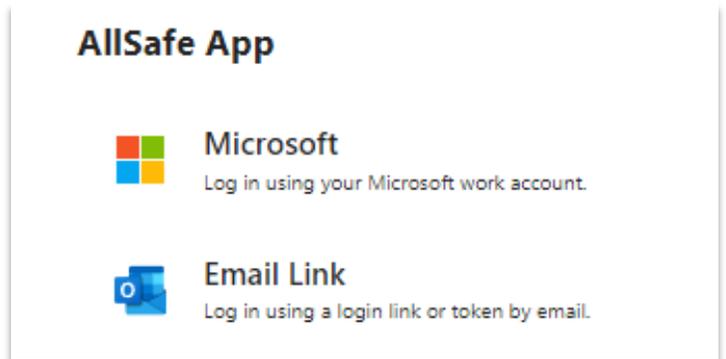


- b. **Browser:** Use a modern web browser (Chrome, Edge, or Firefox), to go to **https://app.allsafeit.com/**
- c. *Optional:* If logging in via browser, bookmark the page so you can easily find it whenever you need it.

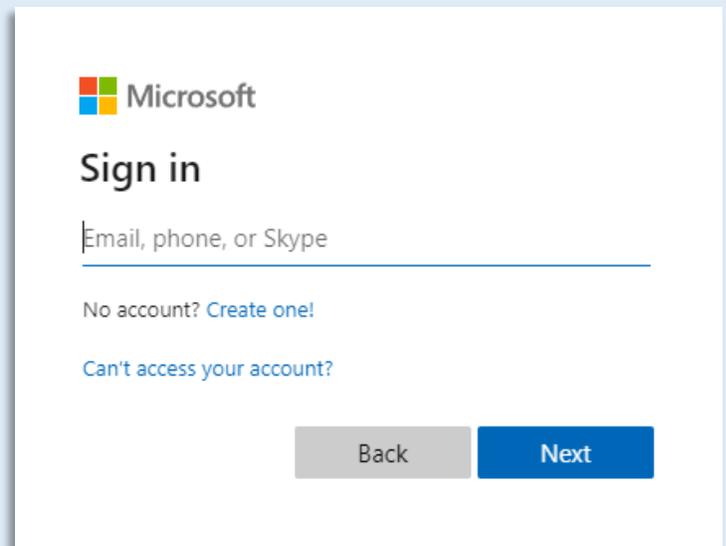


- 2. You will have two options to log in:
 - a. Log in using your Microsoft (Office 365) login
 - b. Log in by entering your email address for a token

* For best results, we recommend using the Microsoft login option if available



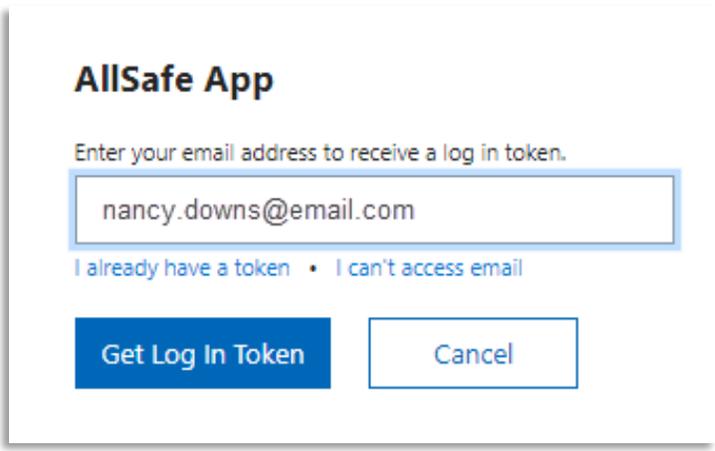
- 3. To log in using your Microsoft account:
 - a. Enter your work email address
 - b. You will be prompted to enter your password. Use the same password you use to login to your email or Office 365 apps.
 - c. If your organization uses multi-factor authentication, you will be prompted to authenticate as usual.



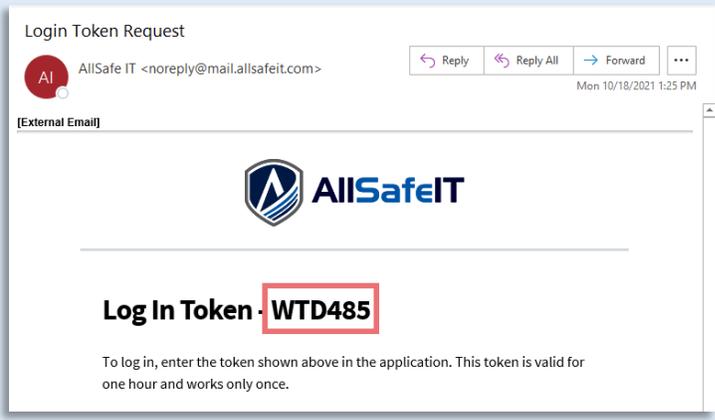
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Using the AllSafe APP

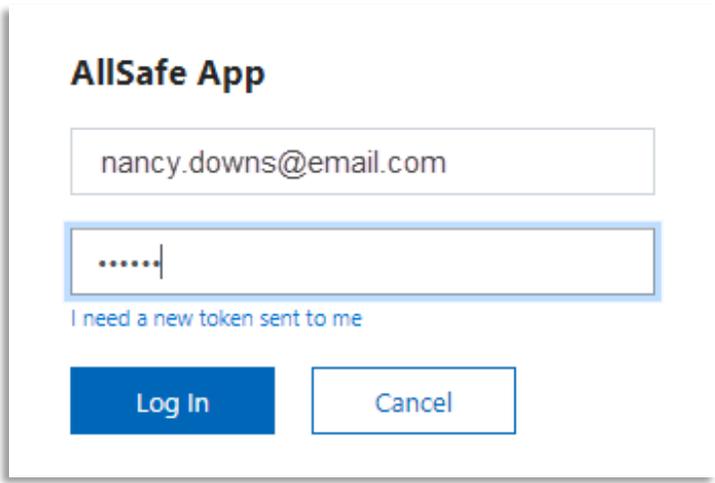
- 4. To login using an email token:
 - a. Enter your work email address
 - b. Click **Get Log In Token**



- c. Check your email for your 6-character login token from AllSafe IT
 - d. Check your spam/junk folder if you can't find the token email; it will come from: **noreply@mail.allsafeit.com**
 - e. Please note the token is only valid for one hour and will only work once



- f. Go back to the AllSafe App, enter the token, and click **Log In**

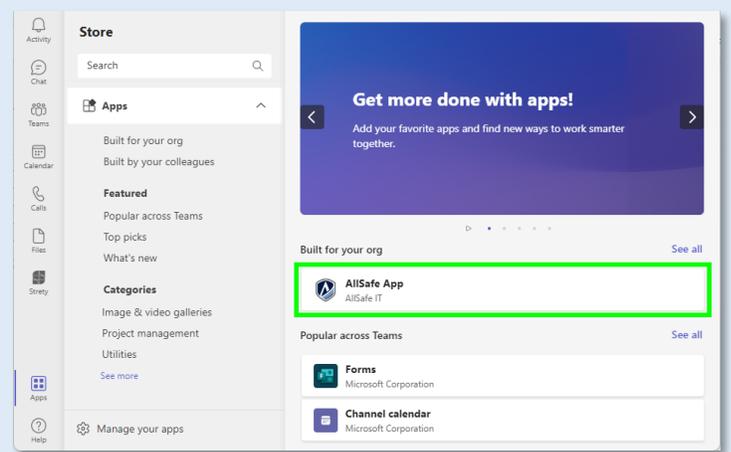
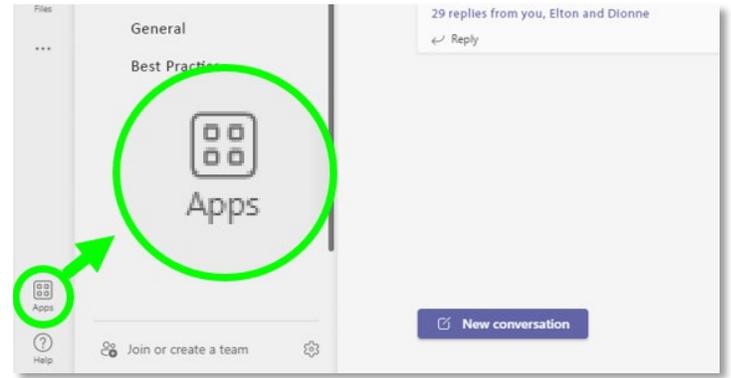


Adding the AllSafe App to Microsoft Teams

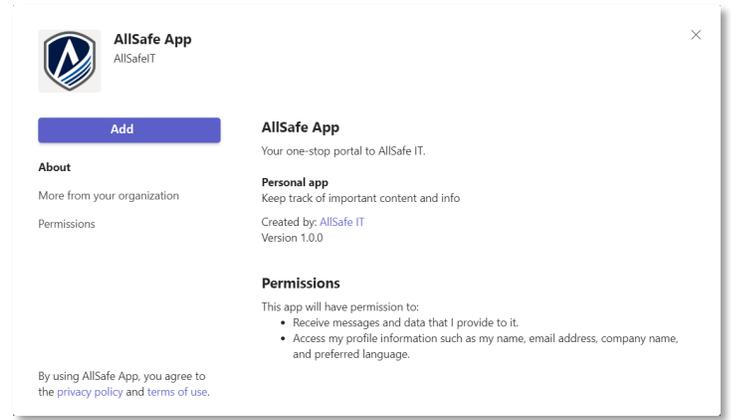
If your company uses Microsoft Teams, you can use the integrated AllSafe App to make it even more convenient to access.

Here's how to add the AllSafe App to Teams:

1. Open Teams and click the **Apps** button at the bottom left corner
 2. The AllSafe App will be listed under the **Built for your org** section at the top of the Apps store. You can use the search bar if you do not see the AllSafe App listed.
 3. Click on **AllSafe App**
- * If you cannot find the AllSafe App in Teams, open a ticket with us to deploy the app for your company

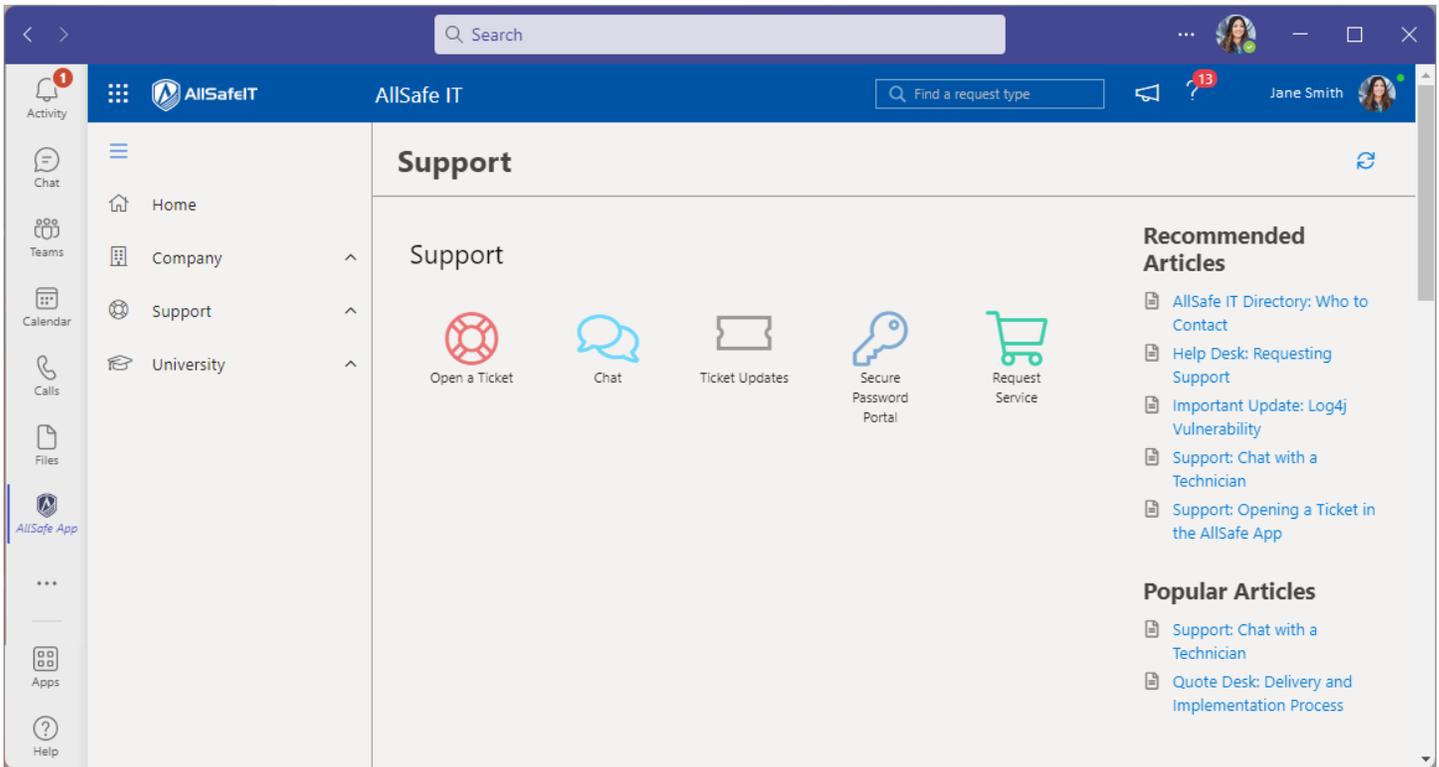


4. Click **Add** to add the AllSafe App to your Teams, then click **Open** to open it

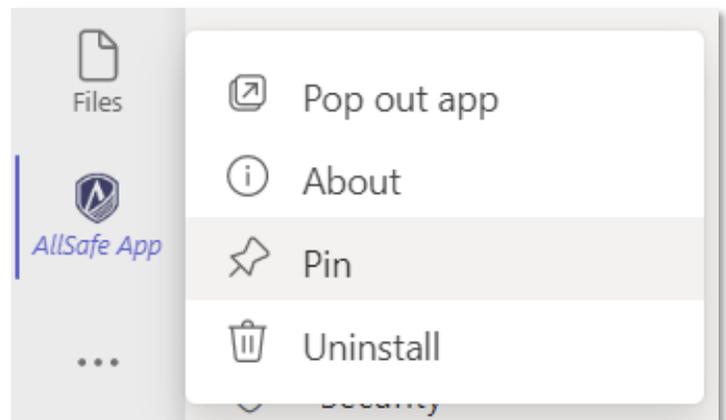


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Using the AllSafe App

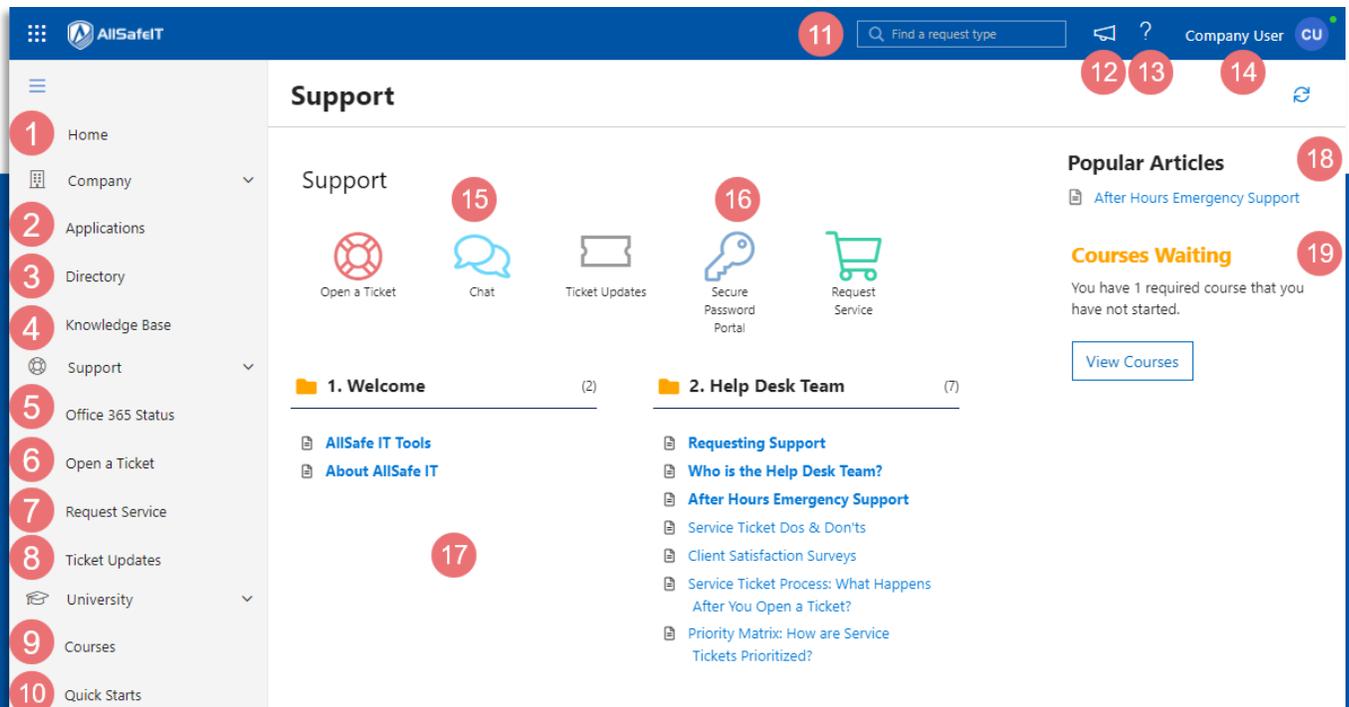


5. The AllSafe App will open directly inside Teams and will perform just as it does in the web version.
 6. Since you're already logged into Teams, the AllSafe App will use your Microsoft account to authenticate. No need to log in again!
- * **OPTIONAL BUT RECOMMENDED:** With the AllSafe App open in Teams, right-click the app icon on the left menu bar to **Pin** it there. This way it will always be easy to find and click when you need it!



Navigating the AllSafe App

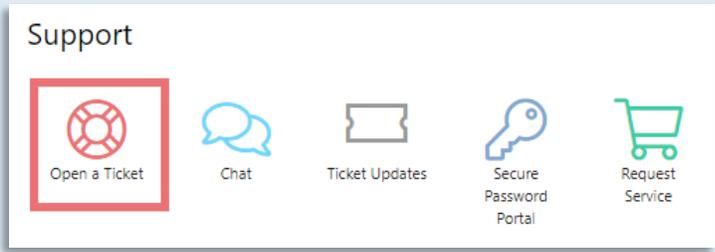
1. **Home** – Home screen
2. **Company > Applications** – Quickly access your Microsoft 365 applications
3. **Company > Directory** – Directory of all users at your organization
4. **Company > Knowledge Base** – Reference guide to AllSafe IT's services
5. **Support > Office 365 Status** – Office 365 Services and their real-time statuses
6. **Support > Open a Ticket** – Open a new ticket
7. **Support > Request Service** – Request a quote for new software, hardware or project
8. **Support > Ticket Updates** – Check on the status of your existing support tickets
9. **University > Courses** – Access training content, including complimentary Office 365 courses, security training, and more
10. **University > Quick Starts** – Access and download quick training and reference guides
11. **Search Bar** – Search for a ticket request type
12. **Notifications** – Shows if you have notifications regarding ticket updates
13. **Help** – Navigation guide for the AllSafe App
14. **Profile** – Shows the user profile you are logged in as; this is where you can log out
15. **Chat** – Instantly chat with a technician for real-time support
16. **Secure Password Portal** – Securely share passwords with the AllSafe IT help desk
17. **Pinned Articles** – Recommended KB articles
18. **Popular Articles** – KB articles popular with your organization
19. **Courses Waiting** – Required courses that you have not started



Opening a Ticket in the AllSafe App

The AllSafe App is the best way to request support. Our ticket request forms will guide you through providing all the information we need to efficiently work the ticket.

4. Click **Open a Ticket**

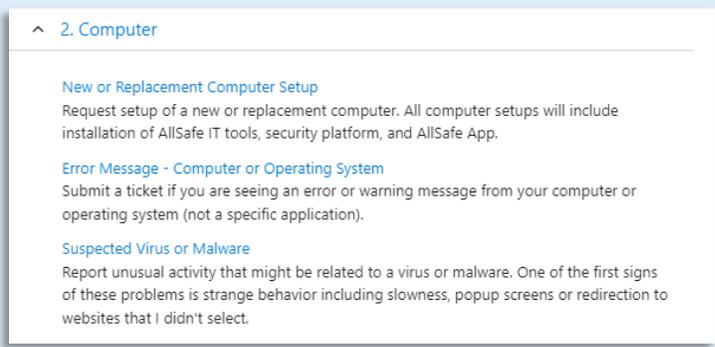


5. Select a support category



6. Select a request type

7. If you're not sure what category your request type is under, or if you can't find what you're looking for, you can use the search bar at the top of the screen



AllSafe IT Client Manual

Using the AllSafe APP

8. Complete the form as accurately and thoroughly as possible. Our guided forms are designed to gather all the information we need to efficiently work on any issue.

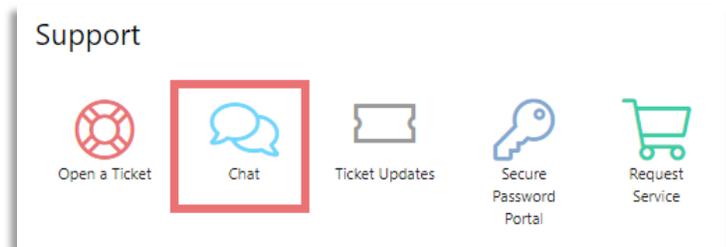
- 9. At the end of each form, you will be able to add any details not otherwise captured in the form. The more details you can provide, the better.
- 10. Attach any supporting screenshots or documents.
- 11. Click **Submit**
- 12. Your request will be submitted and a ticket will be created

13. Optional: Select a date and time to schedule a remote session for a technician to work with you on the ticket

Chat with a Technician

Use our live chat feature to receive instant, real-time support.

1. Click **Chat**
2. Enter your email address, first and last name
3. Enter a brief message describing your support request
4. Click **Sign In**



AllSafe IT

Welcome to your 24/7 Help Desk!
Please sign in.

Email
nancy.downs@email.com

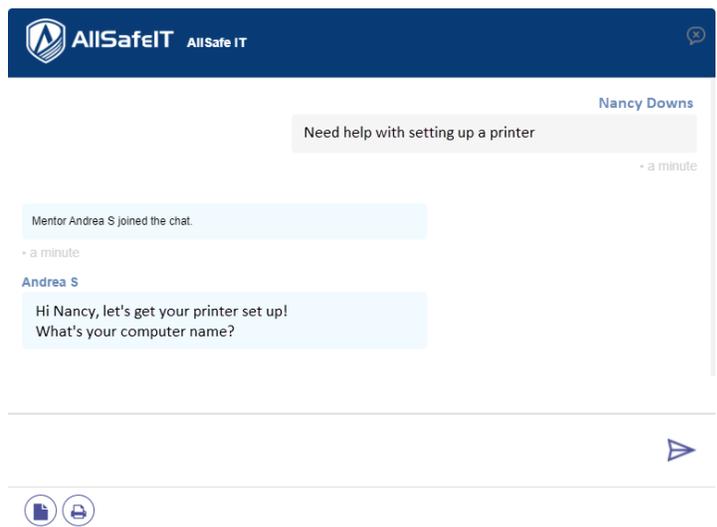
First Name
Nancy

Last Name
Downs

Message
Need help with setting up a printer

SIGN IN

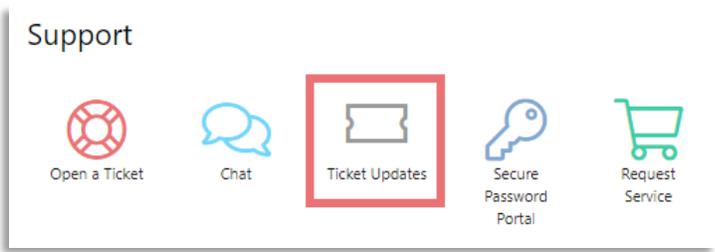
5. A chat room will open and a technician will connect to assist you
- * If you need to leave the chat for any reason (e.g., to reboot your computer), you can re-enter the existing chat session up to 60 minutes later.
 - * If you would like to save your chat conversation, use the buttons at the bottom-left corner of the chat to copy it to your clipboard or print it out



Checking Ticket Status in the AllSafe App

Once you've opened a ticket, you can use the AllSafe App to check the status or communicate with the assigned technician.

1. Click **Ticket Updates**



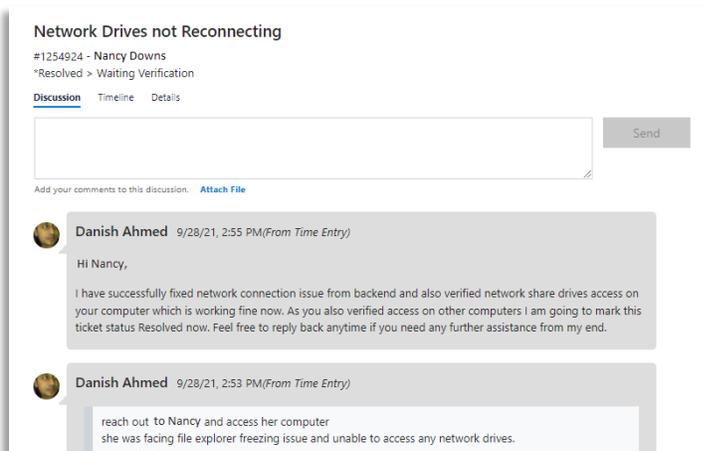
2. You will be able to view a list of all your open tickets (you can also click the tabs at the top of the screen to view Closed tickets and tickets in Waiting statuses)
3. Click on any ticket to view more details

Ticket Updates 10/1/18 - 9/30/21

Open Closed Waiting

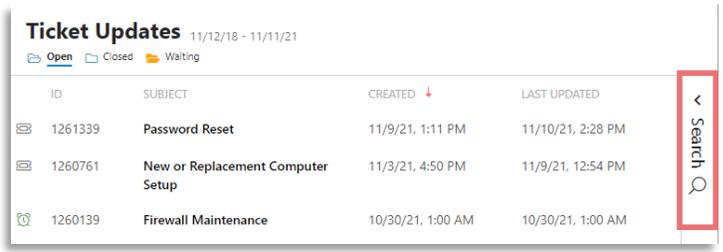
ID	SUBJECT	CREATED	LAST UPDATED	STATUS / PRIORITY
1254924	Network Drives not Reconnecting	9/27/21, 10:14 AM	9/28/21, 4:56 PM	*Resolved > Waiting Verification P3 Normal
1254915	Problems accessing company sharepoint website	9/27/21, 9:49 AM	9/30/21, 9:38 AM	*Scheduled > Remote P3 Normal
1253893	Internet Up and Down Constantly	9/20/21, 3:20 PM	9/30/21, 9:14 AM	*Scheduled > Remote P3 Normal
1253876	Cannot Scan	9/20/21, 1:16 PM	9/22/21, 2:40 PM	Needs Scheduling > Onsite P2 Quick Response

4. On the **Discussion** tab, you will be able to view notes and communications from the assigned technician. You can also enter additional details or send a message to the technician.
5. The **Timeline** tab will show a history of all updates to the ticket.
6. The **Details** tab will show the ticket's Contact, History, Classification and Team information.



Searching for a Ticket

1. To search for a ticket in the AllSafe App, click the **Search** button at the far right of the Ticket Updates screen

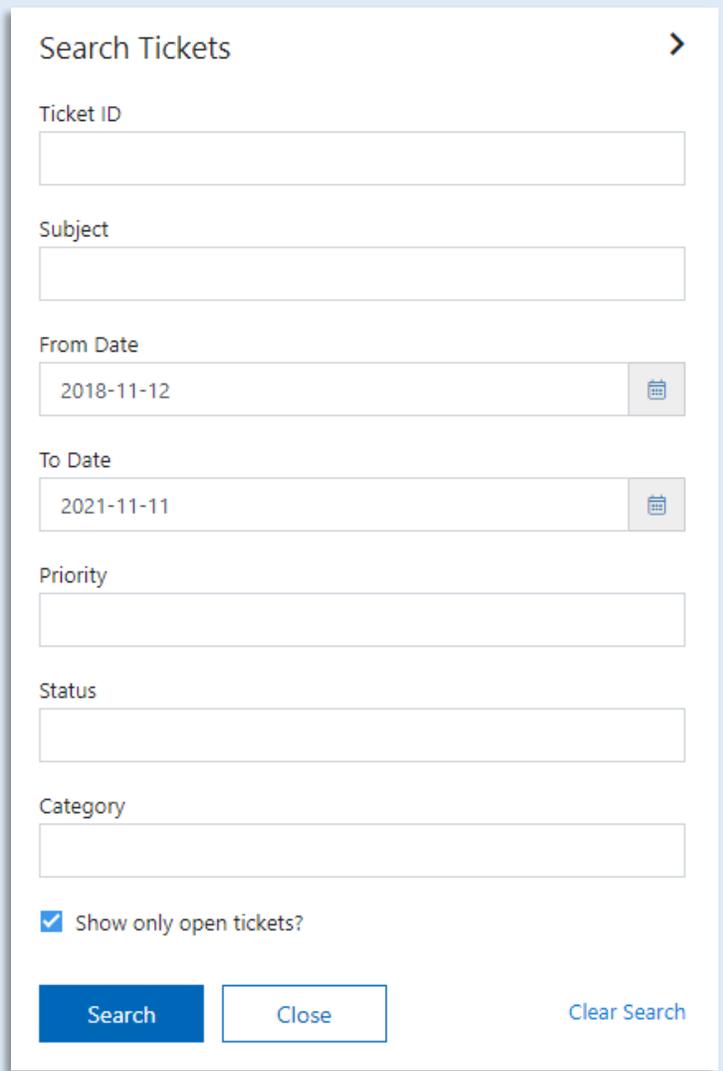


ID	SUBJECT	CREATED	LAST UPDATED
1261339	Password Reset	11/9/21, 1:11 PM	11/10/21, 2:28 PM
1260761	New or Replacement Computer Setup	11/3/21, 4:50 PM	11/9/21, 12:54 PM
1260139	Firewall Maintenance	10/30/21, 1:00 AM	10/30/21, 1:00 AM

2. Enter your search criteria. You can search for tickets by:
- **Ticket ID** – also referred to as Ticket #
 - **Subject** – subject line of the ticket
 - **From Date/To Date** – date range when the ticket was entered
 - **Priority** – e.g., P1, P2, P3
 - **Status** – the status of the ticket
 - **Category**

3. Click the checkbox to denote whether the search results should include closed tickets or only open tickets

4. Click **Search**



Search Tickets

Ticket ID:

Subject:

From Date: 

To Date: 

Priority:

Status:

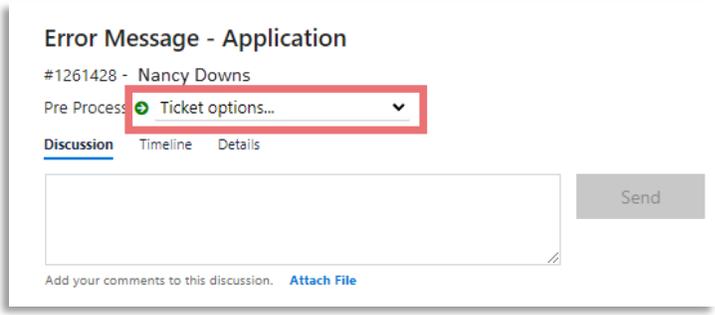
Category:

Show only open tickets?

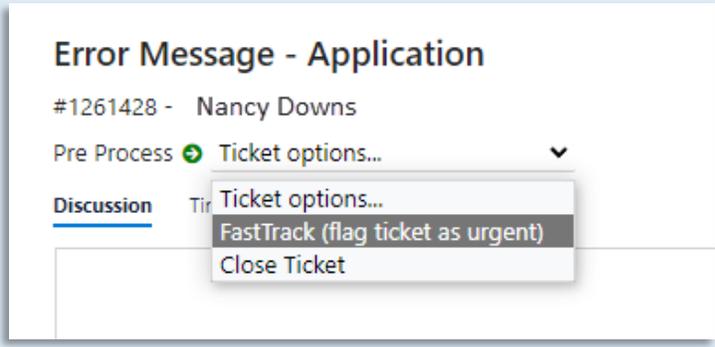
FastTracking an Urgent Ticket

You can flag tickets for escalation if they need urgent attention.

1. Go to **Ticket Updates** and select the ticket that you would like to FastTrack
2. Click the **Ticket options** drop down at the top of the ticket's Discussion tab



3. Select **FastTrack (flag ticket as urgent)**



4. The ticket priority will be escalated, and the Help Desk team will be alerted.

* You can confirm that the escalation request went through by checking the ticket's Details tab. The ticket status will be changed to "Client FastTrack Requested" and the priority will be changed to P2.

History	
Open Date	11/4/21, 9:05 AM
Last Update	11/4/21, 9:48 AM
Status	Client FastTrack Requested
Classification	
Ticket ID	1260886
Category	Triage
Priority	P2 Quick Response
Impact	Medium

Closing a Ticket

You can close a ticket if you no longer need assistance.

1. Go to **Ticket Updates** and select the ticket that you would like to close

Ticket Updates 11/11/18 - 11/10/21

Open Closed Waiting

ID	SUBJECT	CREATED ↓
1261430	Computer Hardware Problem	11/10/21, 4:03 PM
1261428	Error Message - Application	11/10/21, 3:48 PM

2. OPTIONAL, but appreciated: Enter a note in the Discussion window to let us know why you're closing the ticket, then click **Send**

Computer Hardware Problem

#1261430 - Nancy Downs

Pre Process Ticket options...

Discussion Timeline Details

False alarm! My cat unplugged the power cord. Please disregard.

Send

3. Click the **Ticket options** drop down at the top of the Discussion tab and select **Close Ticket**
4. Click **OK** to confirm

Computer Hardware Problem

#1261430 - Nancy Downs

Pre Process Ticket options...

Discussion Timeline Details

Ticket options...
FastTrack (flag ticket as urgent)
Close Ticket

Add your comments to this discussion. Attach File

Nancy Downs 11/10/21, 4:10 PM
False alarm! My cat unplugged the power cord. Please disregard.

5. The ticket status will be changed to Resolved and the ticket will be closed

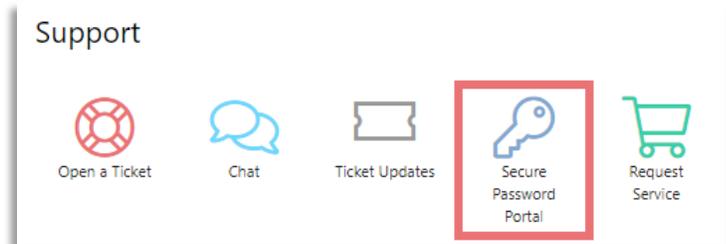
History

Open Date	11/10/21, 4:03 PM
Last Update	11/10/21, 4:22 PM
Status	*Resolved

Using the Secure Password Portal

Occasionally, a technician may need to ask you for a password while working on a ticket. Passwords should never be sent via email. Instead, use our Secure Password Portal.

1. Click **Secure Password Portal**



2. Enter the password in the first field; do not include the username or any other identifying information
3. Enter the ticket number in the second field
4. Click **Send Password**

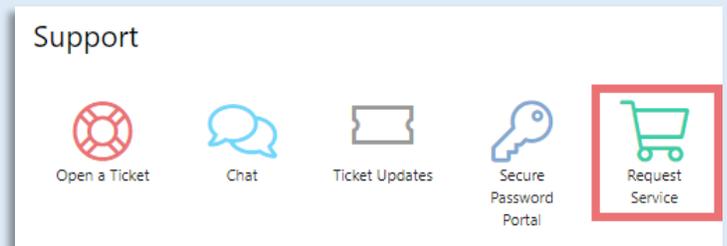


The Secure Password Portal will encrypt the password and pass it directly into the related ticket. Once used, passwords are unequivocally deleted.

Requesting a Non-Technical Service Through the AllSafe App

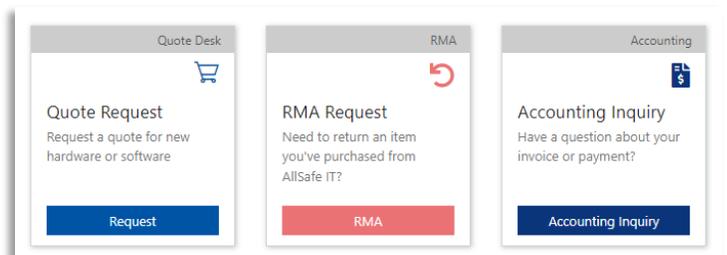
You can also use the AllSafe App to request non-technical services.

1. Click **Request Service**

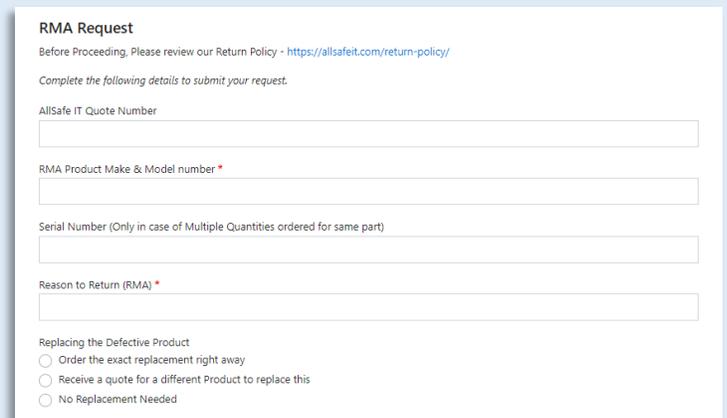


2. Select the service you would like to request:

- **Quote Request** – Request a quote for new hardware, software or services
- **RMA Request** – Submit an RMA to return a product purchased through AllSafe IT
- **Accounting Inquiry** – Contact our Accounting team with a question about an invoice or payment



3. Follow the instructions in the form and complete it as accurately and thoroughly as possible.
4. Click **Submit** to send the request.
5. The appropriate team will receive the request and respond as soon as possible.



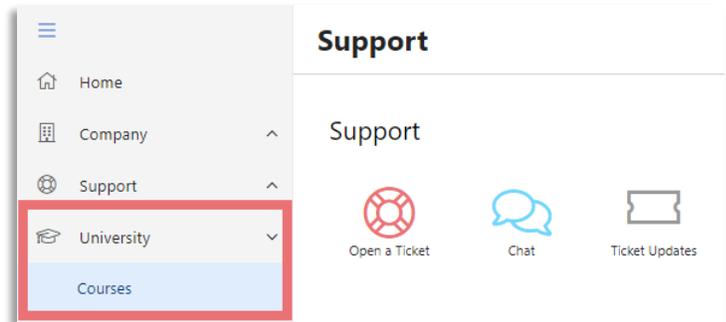
The screenshot shows the 'RMA Request' form. It includes the following fields and options:

- RMA Request** header with a link to the Return Policy: <https://allsafeit.com/return-policy/>
- Instruction: "Complete the following details to submit your request."
- Input field: "AllSafe IT Quote Number"
- Input field: "RMA Product Make & Model number *"
- Input field: "Serial Number (Only in case of Multiple Quantities ordered for same part)"
- Input field: "Reason to Return (RMA) *"
- Section: "Replacing the Defective Product"
 - Order the exact replacement right away
 - Receive a quote for a different Product to replace this
 - No Replacement Needed

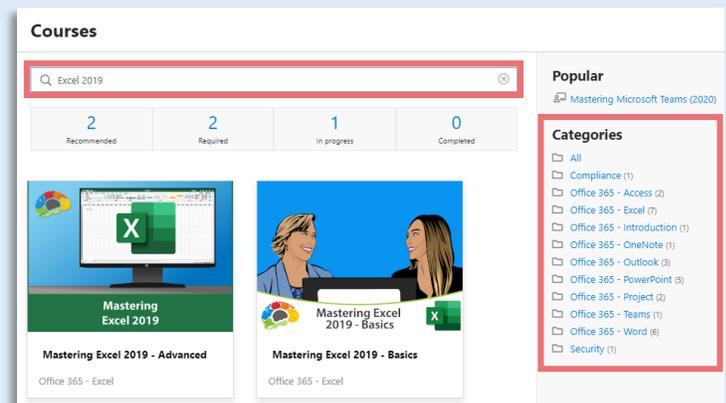
Accessing Training Courses

You can use the AllSafe App to access curated training courses, including FREE high-quality Office 365 training powered by Bigger Brains.

1. Click **University**, then click **Courses**

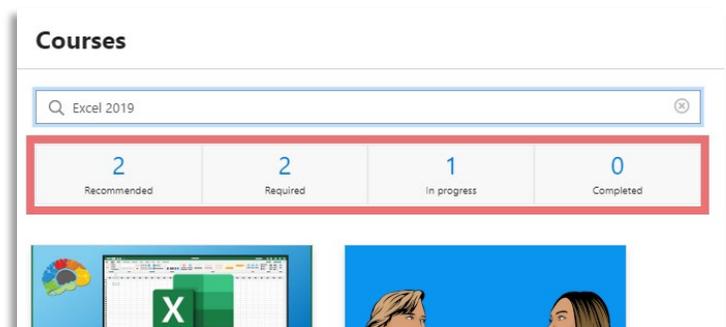


2. Search for a course using a search bar at the top of the screen or browse the **Categories** listing at the right



3. The widget at the top of the screen will show:
 - Recommended Courses
 - Required Courses
 - Courses in Progress
 - Completed Courses

* Recommended and Required courses are set by your Company Admin and/or AllSafe IT



4. Click a course to view its course description
5. Click **Enroll** to enroll in the course
6. Click a lesson to start or resume the lesson

4 Mastering Excel 2019 - Basics

There are two kinds of people: Those who are masters at Excel, and those who wish they were.

5 Enroll

6 1 Start Your Course
 Bigger Brains Course for Mastering Excel 2019 - Basics

OVERALL PROGRESS: 0%

LESSONS: Click the Enroll button to view the lessons.

7. Start learning! Follow the on-screen instructions to complete the course.

Depending on the course, lessons may consist of videos or text, and may contain quizzes and exams to assess progress.

Mastering Excel 2019 - Basics

BIGGER BRAINS

Mastering Excel 2019 - Basics

Course Map Search 15% 1 of 42

Mastering Excel 2019 - Basics

Teacher: Kathy Jones
 Learner: Alexa Botelho

Section 1

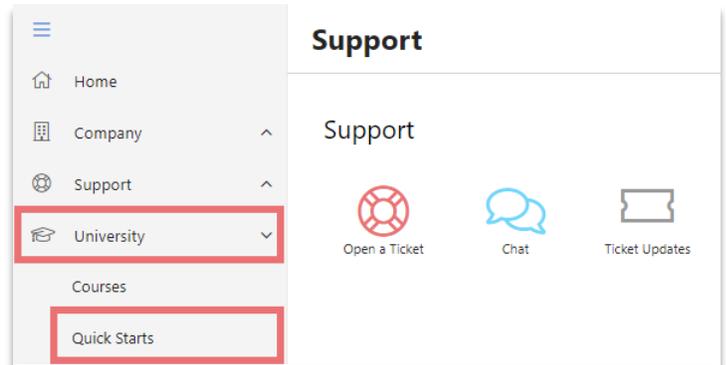
01: Introduction

0:00

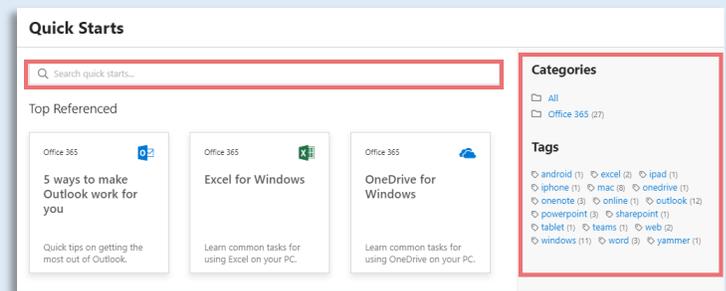
Accessing Quick Starts

In addition to the longer courses, you also have access to quick training and reference guides.

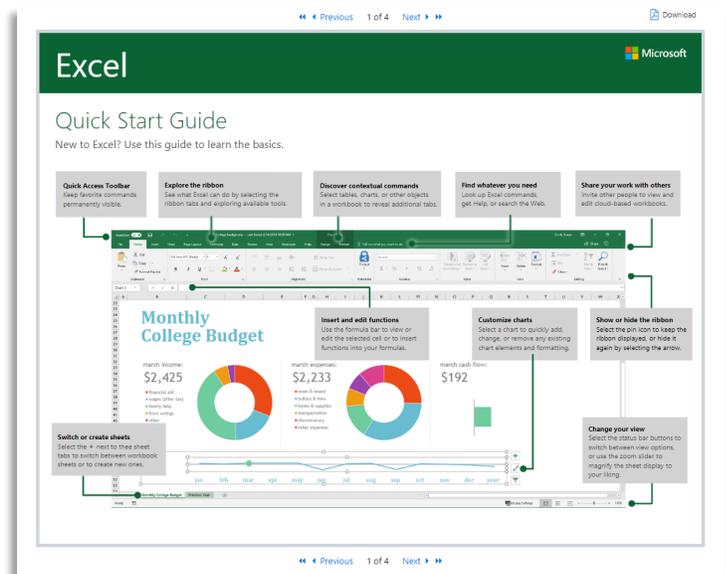
1. Click **University**, then click **Quick Starts**



2. Search for a Quick Start guide using a search bar at the top of the screen or browse the **Categories** or **Tags** in the side bar

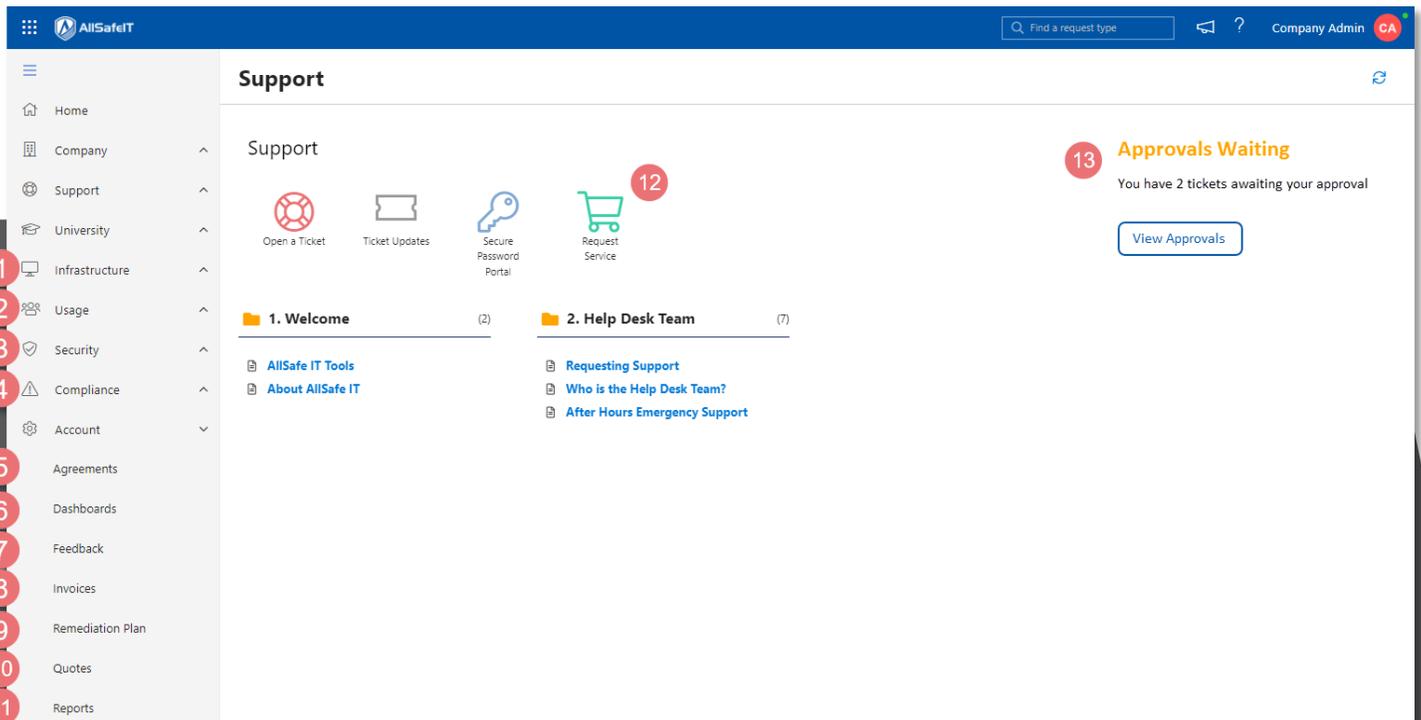


3. Click any Quick Start guide to view the content
4. Click the **Previous** and **Next** buttons to view other pages in the guide
5. Click the **Download** button at the top right corner to download content in PDF format



Advanced AllSafe App Features for Company Admins

1. **Infrastructure** – Detailed, downloadable lists of all domains, endpoints, servers and software within the organization
 2. **Usage** – Detailed, downloadable lists of all Microsoft 365 licenses and users
 3. **Security** – Detailed lists of data breaches associated with users in the organization
 4. **Compliance** – A view of all compliance risks as well as detailed assessments and reports
 5. **Agreements** – View all current agreements
 6. **Dashboards** – View dashboards showing visual representations of your company's service history, compliance, infrastructure, etc
 7. **Feedback** – View CSAT feedback left for AllSafe IT by users at your company
 8. **Invoices** – View detailed billing history
 9. **Remediation Plan** – View a visual representation of your IT strategy
 10. **Quotes** – View and approve quotes for new hardware, software, services, etc
 11. **Reports** – View reports detailing any risks, recommendations, etc.
 12. **Admin-Only Service Requests** – Update AllSafe App permissions for other users
 13. **Approvals Waiting** – Review tickets awaiting approval and approve/deny them here.
- * *Speak with your vCIO for guidance on how to best utilize these features. This manual will cover Approvals, Quotes, Invoices and Payment Portal.*



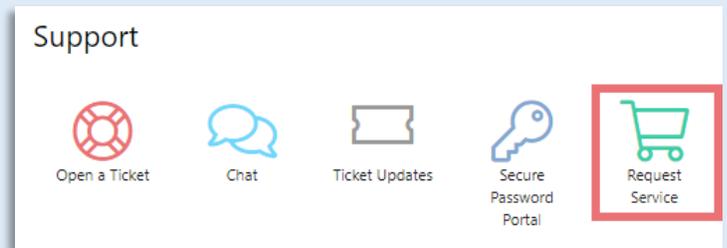
The screenshot displays the AllSafe IT Client Manual interface. On the left, a navigation menu lists various features, with items 1 through 11 highlighted in red circles. The main content area is titled 'Support' and includes a search bar, a notification for '13 Approvals Waiting' (2 tickets awaiting approval), and a 'View Approvals' button. Below this, there are two sections: '1. Welcome' with links to 'AllSafe IT Tools' and 'About AllSafe IT', and '2. Help Desk Team' with links to 'Requesting Support', 'Who is the Help Desk Team?', and 'After Hours Emergency Support'.

Update AllSafe App Permissions for Another User

If another user at your company requires access to advanced AllSafe App features, you can request this through the AllSafe App. Below is a description of the available permissions:

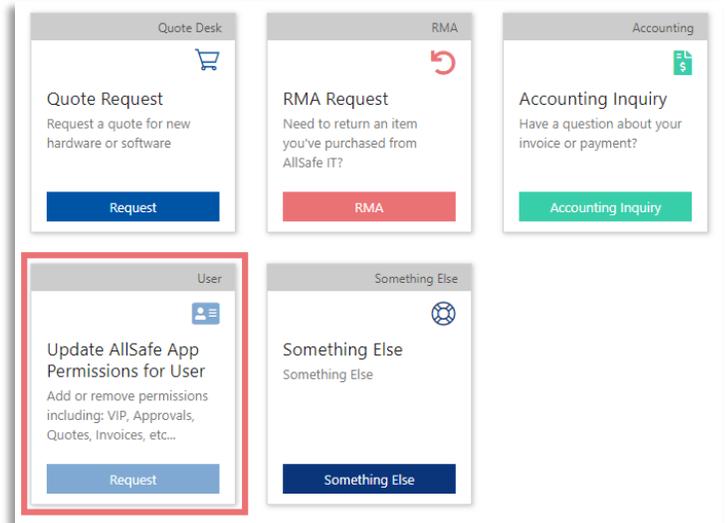
- **User:** Standard user with no special permissions
- **All Tickets:** Allows user to view tickets created by all users at the company.
- **Approver:** Enables user to approve/decline tickets that require approval.
- **Quotes:** Allows user to view and approve quotes/proposals.
- **Invoices:** Allows user to view invoices and access the payment portal.
- **Company Admin:** Grants user access to all of the above.

1. Click **Request Service**



2. Select **Update AllSafe App Permissions for User**

(Note: This option is only visible to users with full Company Admin access)



3. Enter the User's name and email address

Update AllSafe App Permissions for User

Request to update the AllSafe App permissions for a user.

Complete the following details to submit your request.

User Name *

Contact Email *

4. Select the AllSafe App role that you would like assigned to the user
5. Click **Submit**
6. Both you and the affected user will be notified via email when the requested change is completed

* **NOTE:** Be careful when granting Company Admin access to a user. Company Admins have full access to all features, including the ability to update permissions for other users.

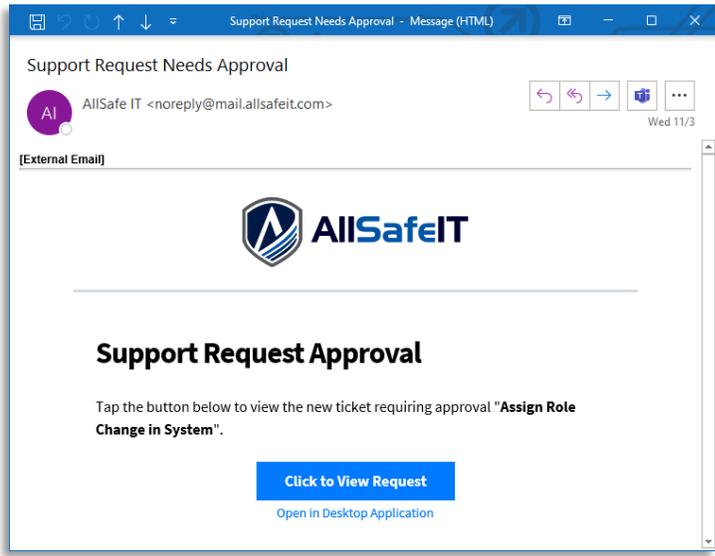
Assign the following AllSafe App role for this user: *

- User
- All Tickets
- Approver
- Invoices
- Quotes
- Quotes + Invoices
- Company Admin (FULL ACCESS)

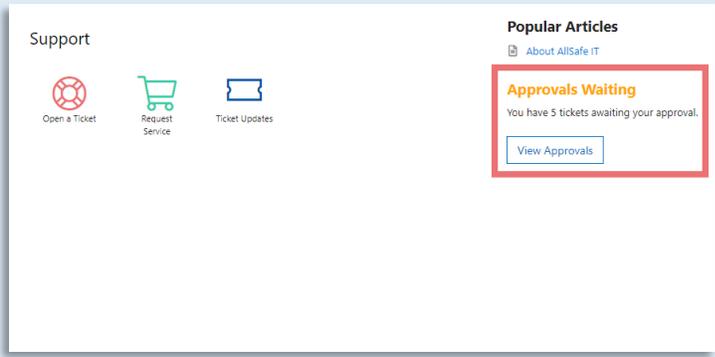
Ticket Approvals in the AllSafe App

Some tickets require approval if they involve changes to security clearances, additional licenses or other expenses, etc. Users will be notified when their request needs approval.

As a Company Admin, you will receive a notification email every time a ticket requiring approval is submitted. You can review these tickets and approve/deny them in the AllSafe App.



1. Click the button in the notification email or open the AllSafe App and click **View Approvals**



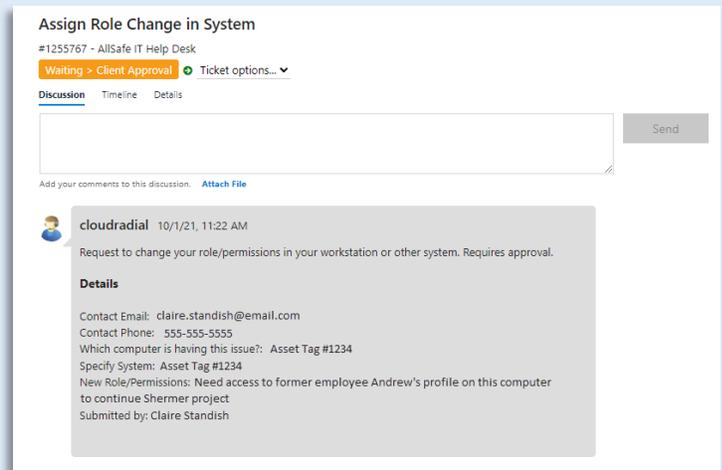
2. You will be able to view a list of all tickets awaiting approval.
3. Click on a ticket to view details including who submitted it, their notes, etc.

Ticket Updates 10/2/18 - 10/1/21

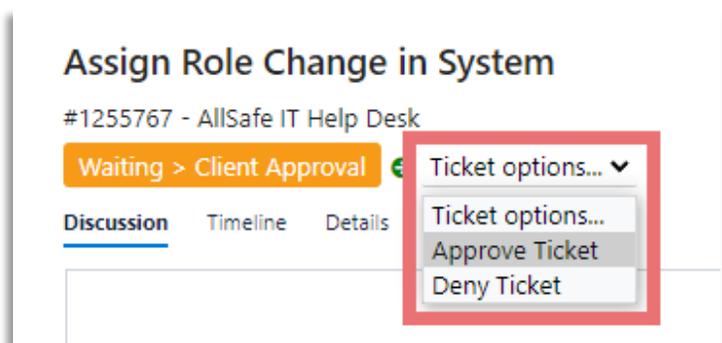
Open Closed **Waiting**

ID	SUBJECT	STATUS / PRIORITY	CATEGORY	CONTACT
1255767	Assign Role Change in System	Waiting > Client Approval P3 Normal	Triage	Claire Standish
1255754	Install Application - License/Subscription Required	Waiting > Client Approval P3 Normal	Triage	John Bender

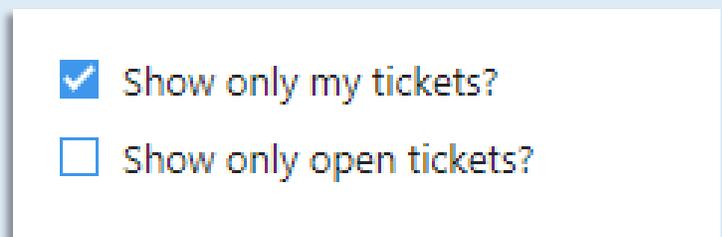
4. Click the **Timeline** and **Details** tabs for additional info
5. On the **Discussion** tab, you can add comments to the ticket. These will be added to the ticket and the user who opened the ticket will be notified.



6. Once you have reviewed the ticket, click the **Ticket Options** drop-down menu and select one of the following:
 - **Approve Ticket** – Ticket will be released from waiting status and assigned to a technician
 - **Deny Ticket** – Ticket will be closed and the user will be notified



As a Company Admin, the Ticket Updates screen will show tickets from all users at your company by default. If you would like to see your tickets only, use the search function to **Show only my tickets** (more on this on the following page).

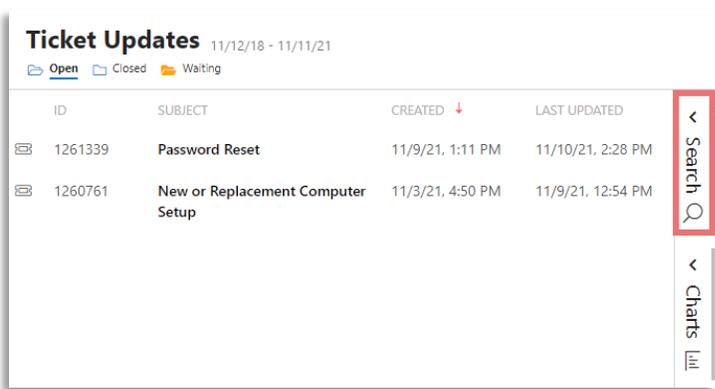


Advanced Ticket Search

Company Admins have access to more search parameters than standard search (refer to page 40).

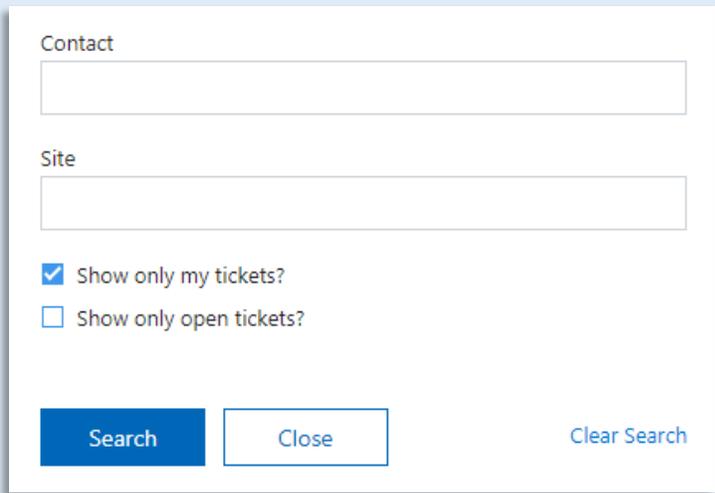
1. Click the **Search** button at the far right of the Ticket Updates screen

* Note the **Charts** button below Search. This is an admin-only feature and will show stats on ticket submissions for your company.



2. In addition to the standard search parameters, you can also search by:

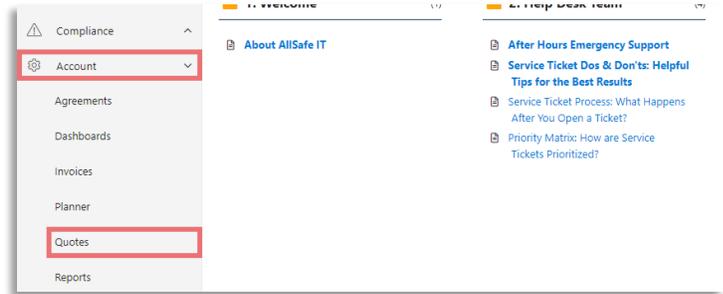
- **Contact** – person who opened the ticket or affected contact
- **Site** – site/location the ticket is associated with
- **Show only my tickets**
- **Show only open tickets**



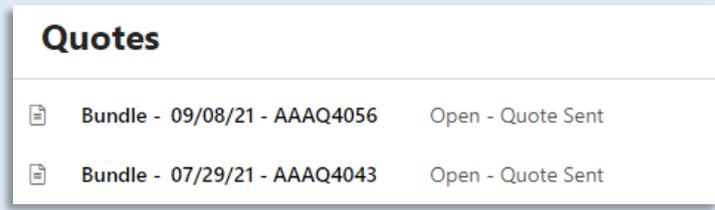
Viewing and Accepting Quotes in the AllSafe App

If you are a Company Admin, you can view open quotes in the AllSafe App and approve them online.

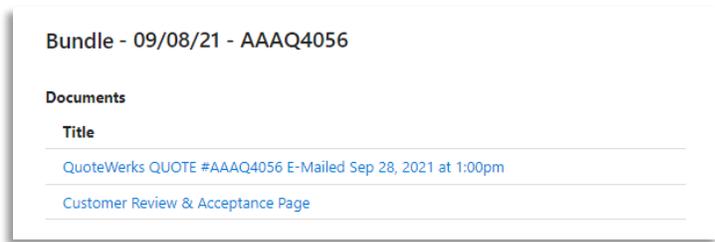
1. Click **Account**, then click **Quotes**



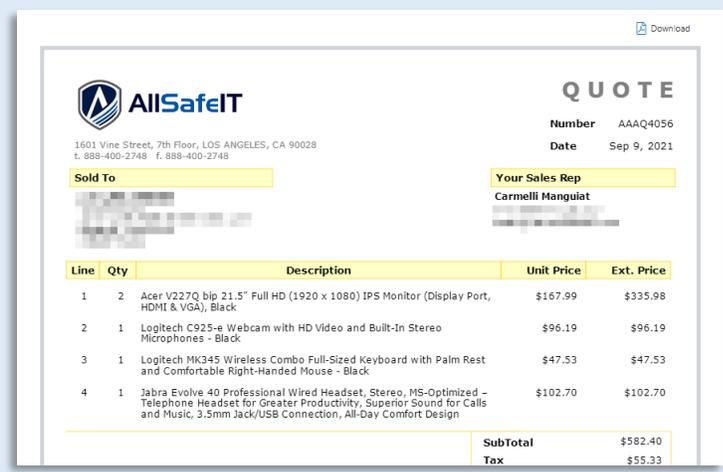
2. You will be able to view a list of all open quotes.
3. Click on a quote to view details



4. Under **Documents**, you should have two linked documents available to view
 - QuoteWerks QUOTE #...
 - Customer Review & Acceptance Package



5. Click the document with the title beginning **QuoteWerks QUOTE #** to open a PDF version of the quote
 - You can click the **Download** button at the top right corner to save a copy to your computer

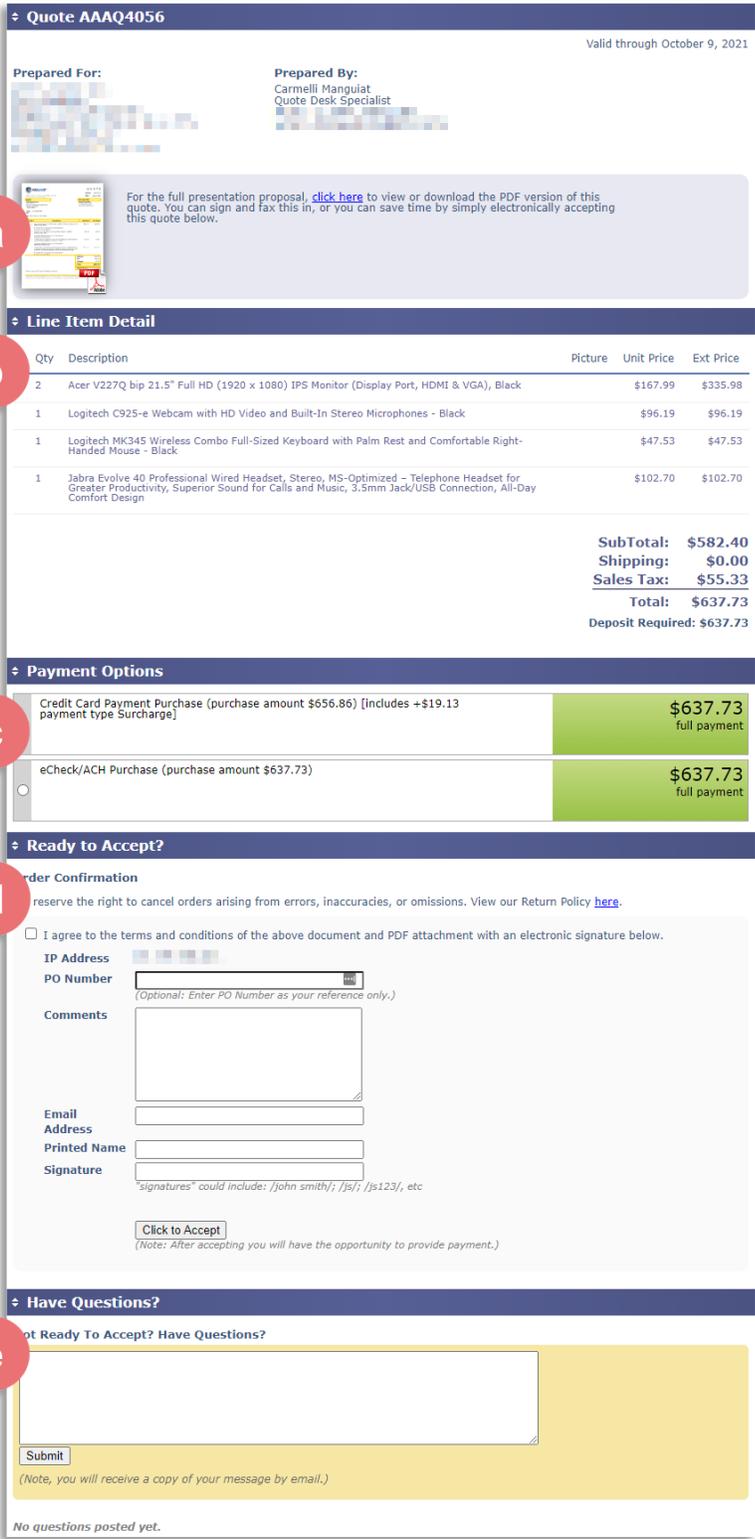


6. Click the document titled **Customer Review & Acceptance Package** to view an online version of the quote

- You can click the provided link to download a PDF version
- View the itemized line item detail to review quantities, product details, prices, etc.
- Select a payment option (may vary depending on what payment methods you have on file)
- If you are ready to accept the quote:
 - Check the box to agree to the terms and conditions
 - Optional: If you have a PO number to reference, enter it in the provided field
 - Optional: Enter any comments
 - Enter your email address
 - Enter your name
 - Electronically sign the document
 - Click the **Click to Accept** button
- If you have questions or would like to discuss the quote before accepting, enter them here.

Once your quote acceptance has been received, it will be processed our Quote Desk Team.

* Read our *Delivery & Implementation Process* on page 27.



Quote AAAQ4056 Valid through October 9, 2021

Prepared For: [Redacted] Prepared By: Carmelli Mangiat, Quote Desk Specialist

For the full presentation proposal, [click here](#) to view or download the PDF version of this quote. You can sign and fax this in, or you can save time by simply electronically accepting this quote below.

Line Item Detail

Qty	Description	Picture	Unit Price	Ext Price
2	Acer V227Q b1p 21.5" Full HD (1920 x 1080) IPS Monitor (Display Port, HDMI & VGA), Black		\$167.99	\$335.98
1	Logitech C925-e Webcam with HD Video and Built-In Stereo Microphones - Black		\$96.19	\$96.19
1	Logitech MK345 Wireless Combo Full-Sized Keyboard with Palm Rest and Comfortable Right-Handed Mouse - Black		\$47.53	\$47.53
1	Jabra Evolve 40 Professional Wired Headset, Stereo, MS-Optimized - Telephone Headset for Greater Productivity, Superior Sound for Calls and Music, 3.5mm Jack/USB Connection, All-Day Comfort Design		\$102.70	\$102.70

SubTotal: \$582.40
 Shipping: \$0.00
 Sales Tax: \$55.33
 Total: \$637.73
 Deposit Required: \$637.73

Payment Options

<input type="radio"/> Credit Card Payment Purchase (purchase amount \$656.86) [Includes +\$19.13 payment type Surcharge]	\$637.73 full payment
<input type="radio"/> eCheck/ACH Purchase (purchase amount \$637.73)	\$637.73 full payment

Ready to Accept?

Order Confirmation
 I reserve the right to cancel orders arising from errors, inaccuracies, or omissions. View our Return Policy [here](#).

I agree to the terms and conditions of the above document and PDF attachment with an electronic signature below.

IP Address: [Redacted]
 PO Number: [Redacted] (Optional: Enter PO Number as your reference only.)
 Comments: [Text Area]
 Email Address: [Text Field]
 Printed Name: [Text Field]
 Signature: [Text Field] (signatures* could include: /john smith/, /js/, /js123/, etc)

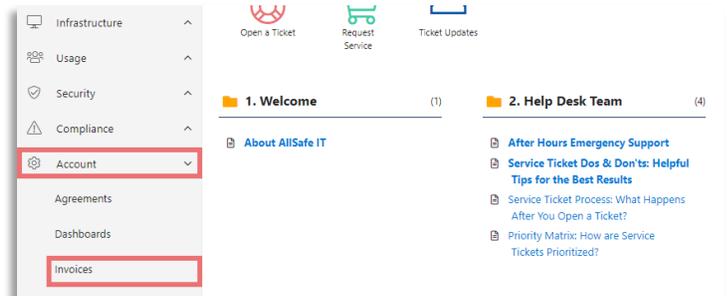
Click to Accept
 (Note: After accepting you will have the opportunity to provide payment.)

Have Questions?
 Not Ready To Accept? Have Questions?
 [Text Area]
 Submit
 (Note, you will receive a copy of your message by email.)
 No questions posted yet.

Viewing Invoices in the AllSafe App

If you are a Company Admin, you can view invoices in the AllSafe App.

1. Click **Account**, then click **Invoices**



2. You will be able to view a list of all invoices for your organization
 - You can click the **Download** button at the top right to download a list of all invoices in .xlsx format

NUMBER	DATE	TOTAL	BALANCE	TYPE	REFERENCE	PO#
160889	10/1/21	\$8,747.21	\$8,747.21	Agreement	Monthly Billing for October	
160749	9/1/21	\$8,287.18	Paid	Agreement	Monthly Billing for September	
160683	8/18/21	\$737.97	Paid	Agreement		
160552	8/18/21	\$3,520.87	Paid	Standard	Order #1451	

3. Click an invoice to view the details and download a PDF version

AllSafe IT
1601 Vine Suite 600
Los Angeles, CA 90028

PAID

Bill To:	Date	Invoice
[Redacted]	08/18/2021	160683
	Account	[Redacted]

Terms	Due Date	Quote No.	Reference
Auto Payment	08/18/2021		
Upgrade from Standard to Wildcard			

Products & Other Charges	Quantity	Price	Amount
License > SSL Certificate: [Redacted]			
STD WLDCCD SSLCERT: Standard Wildcard SSL Certificate (2 Years) Renewal for June 15, 2021 - June 14, 2023	1.00	\$887.97	\$887.97
STD SSL: Standard SSL Security Certificate (1 Year) Credit from the renewal June 7, 2021 - June 7, 2022	-1.00	\$150.00	(\$150.00)
Total Products & Other Charges:			\$737.97

•Pay online via the AllSafe App or by visiting https://allsafeit.connectboosteronline.com/	Invoice Subtotal:	\$737.97
•Past due invoices will be subject to 18% late fee.	Sales Tax:	\$0.00
•A \$25 fee will be imposed on any returned payments & will be due immediately	Invoice Total:	\$737.97
•Accepted payment method via ACH or Credit Card only	Payments:	(\$737.97)
We Thank You For Your Business!	Credits:	\$0.00
	Balance Due:	\$0.00

Accessing the Payment Portal

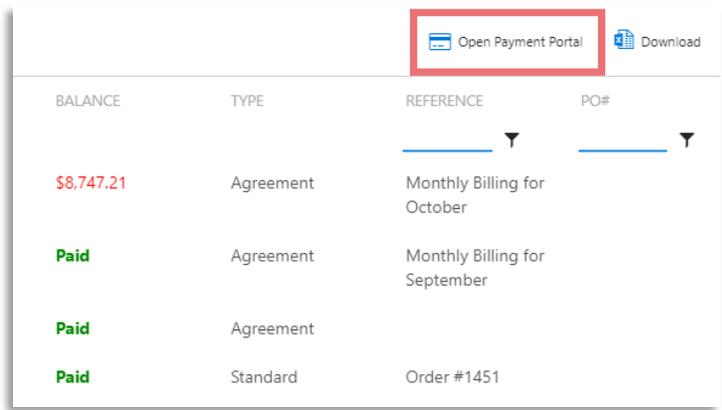
If you are a Company Admin, you can access the Payment Portal through the AllSafe App.

From there, you can:

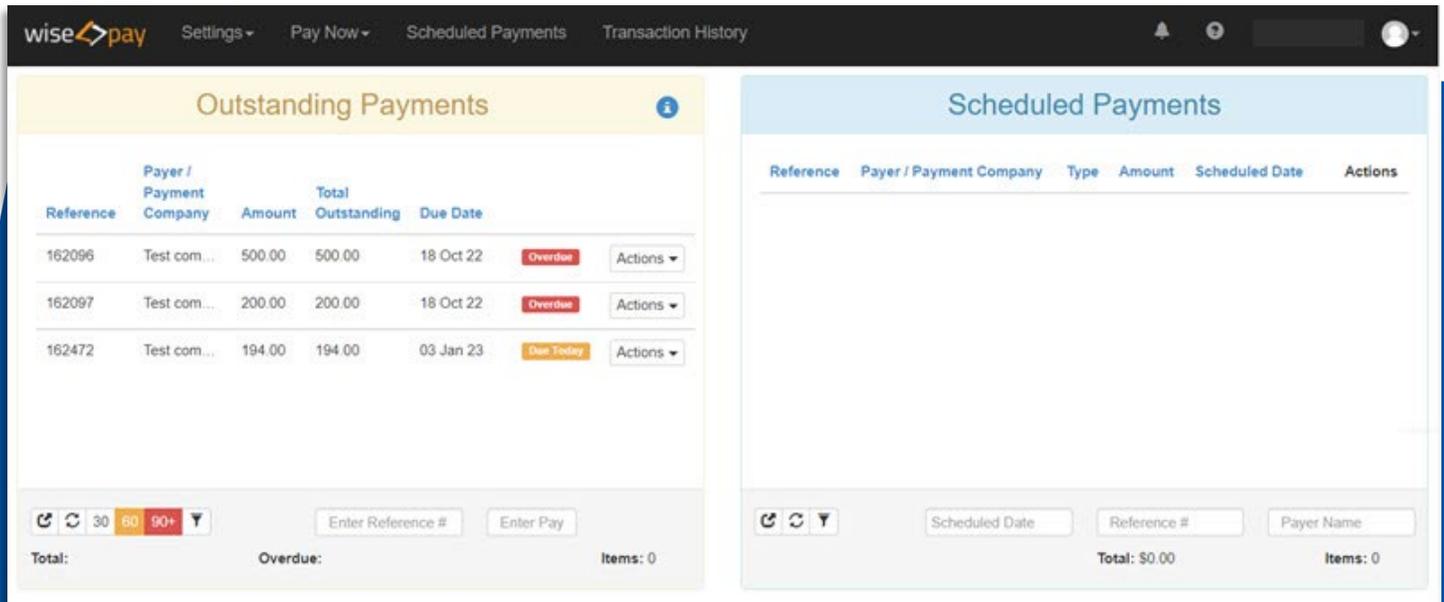
- View invoices
- Make payments
- View your payment history
- Manage your payment methods

To access the Payment Portal:

1. Click **Account**, then click **Invoices**
2. At the top right corner of the Invoices screen, click **Open Payment Portal**
3. The Payment Portal dashboard will open in a new tab/window



BALANCE	TYPE	REFERENCE	PO#
\$8,747.21	Agreement	Monthly Billing for October	
Paid	Agreement	Monthly Billing for September	
Paid	Agreement		
Paid	Standard	Order #1451	



Outstanding Payments

Reference	Payer / Payment Company	Amount	Total Outstanding	Due Date	Status	Actions
162096	Test com...	500.00	500.00	18 Oct 22	Overdue	Actions
162097	Test com...	200.00	200.00	18 Oct 22	Overdue	Actions
162472	Test com...	194.00	194.00	03 Jan 23	Due Today	Actions

Total: Overdue: Items: 0

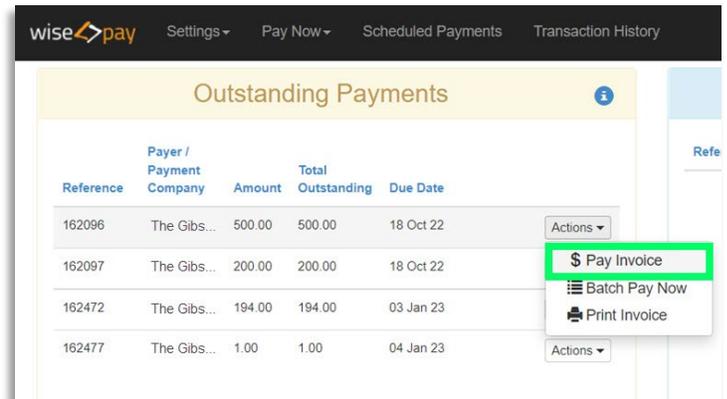
Scheduled Payments

Reference	Payer / Payment Company	Type	Amount	Scheduled Date	Actions

Total: \$0.00 Items: 0

Paying an Invoice

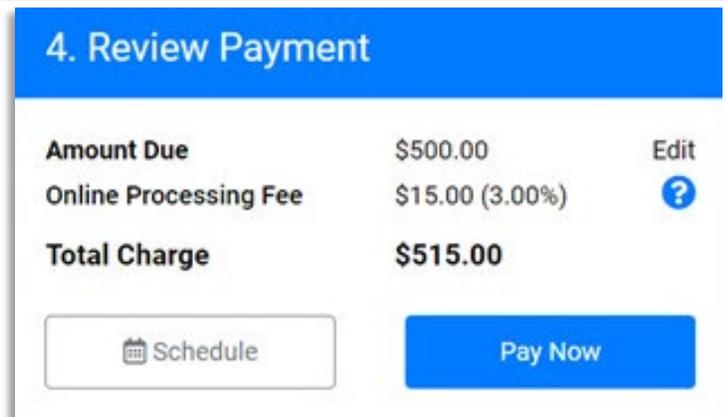
1. Open the Payment Portal
2. Locate the outstanding invoice you would like to pay
3. Click the **Actions** menu for that invoice and select **Pay Invoice**



4. The Invoice Details will open in a new tab
5. In the **Payment Details** box, select a saved payment method or click **Add** to add new payment method

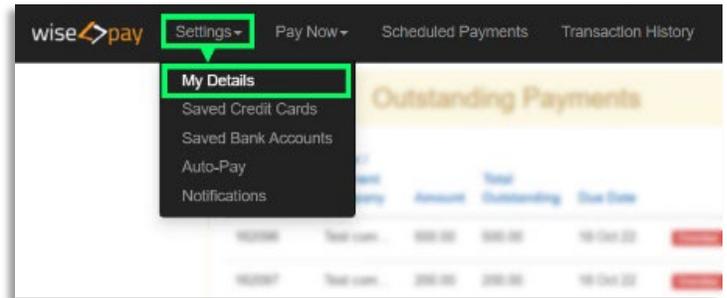


6. In the **Review Payment** box, verify the payment amount, then either:
 - Click **Schedule** to schedule the payment for a later date
 - Click **Pay Now** to process the payment immediately
7. Once the payment is processed, you will have the option to download the invoice

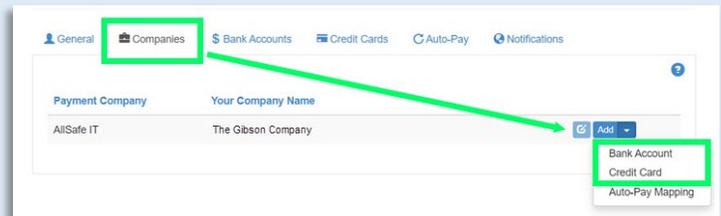


Adding a New Payment Method

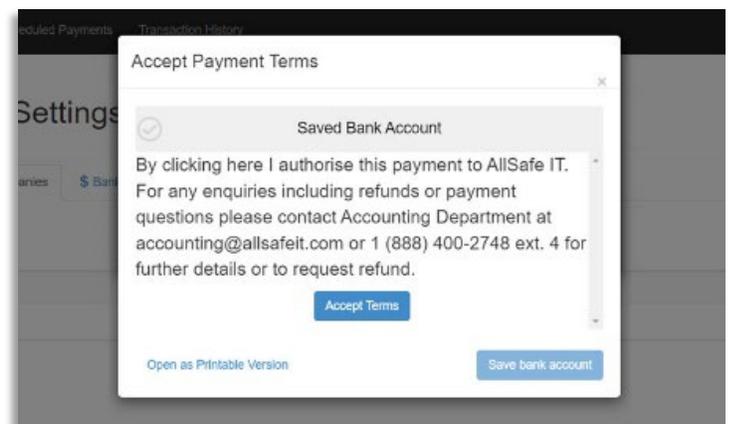
1. Open the Payment Portal
2. Click **Settings > My Details**



3. Select the **Companies** tab, then click the blue **Add** button
4. Select the type of payment method you would like to add: **Bank Account** or **Credit Card**



5. If adding a bank account, enter the checking account details, then click **Update bank account**
5. If adding a credit card, enter the credit card information and billing address, then click **Update Card**
6. Click **Accept Terms** to authorize the payment method to AllSafe IT
7. Click **Save bank account** or **Save Card**



- * You can also set up Auto-Pay using any submitted payment method.

Requesting Support

Print out this guide and keep it at your desk for a quick reference.



AllSafe App★

AllSafe App > Open a Ticket



Chat

AllSafe App > Chat



Email

helpdesk@allsafeit.com



Call

(888) 400-2748

** For urgent/emergency requests*



After Hours

1. Call **(888) 400-2748**
2. Notify the on-call technician that your request is urgent and you require emergency support

AllSafe IT Directory

Whom to contact at AllSafe IT when you need:



Technical Support

AllSafe IT Help Desk Team

-  AllSafe App > Open a Ticket
-  helpdesk@allsafeit.com
-  (888) 400-2748 option 2



New Hardware, Software or Services

AllSafe IT Quote Desk

-  AllSafe App >
Request Service > Quote Request
-  salesteam@allsafeit.com
-  (888) 400-2748 option 1



Non-Technical Issue

AllSafe IT vCIO

-  AllSafe App >
Request Service > Accounting Inquiry
-  vCIO@allsafeit.com
-  (888) 400-2748 option 3