

# Client Self Services Administration

The Client Self Services Portal files are located on the server: *(virtual path here)*

All clients, once set up with a Client ID, may use their Client ID to login to Client Self Services. The default password is "**password**" until the client changes it to one of their choosing.

## Setting Up Client Self Service Access

The SDE Administrator performs **Client Self Services Administration**.

Prior to clients logging into the Self Service Portal, the Administrator must:

- **Assign Client Access in the Self Service Settings** (*link in live version*)
- **Assign a Client Navigation Bar** (*link in live version*)

## Assigning Client Access in the Self Service Settings

### *In the SDE Navigator Frame*

1. Select **Self Service Settings**.
2. Select **Client Access** from the left navigation pane.

### *In the Client Access dialog*

3. Click the **Find** icon.
4. Search to select the client by last name in the popup window.
5. Double-click the client row and the client info is populated in the Client Access dialog.
6. Enter a password of **password** into the Self Service Password dialog box. (If this password box is already populated, this indicates that a password has already been assigned to this Client ID.)
7. Select from the radio buttons what level of access the client should have—**Company, Department, or Client only**.
8. Click the **Save** icon to save the client settings.

## Client Access Dialog

The screenshot shows the 'Client Access' dialog within the SDE Navigator Frame. The left sidebar lists various configuration options: Defaults, Categories, Quick Tickets, Client Access (which is selected and highlighted in blue), Date & Time, E-mail Categories, E-mail Contacts, Languages, Security Settings, System Messages, System Labels, and System Titles. The main content area is titled 'SELF SERVICE SETTINGS - CLIENT ACCESS' and contains a 'Client Information' section. It shows the Client ID as 'AFAKECLIENT', Phone # as '978 889 3169', and Ext. as '3169'. Below this, the Name is listed as 'ALEX' and the Self Service Password is masked as '\*\*\*\*\*'. A 'Filter for Self Service Popups' section contains three radio buttons: 'Access to Company records' (selected), 'Access to Department records', and 'Client Access Only'.

## Assigning a Client Navigation Bar

### *In the SDE Navigator Frame*

1. Select the **Self Service Administration** section.
2. Select the **Self Service Customization Wizard** link.
3. Click the **Navigation** checkbox.
4. Click **Assign Navigation** to access the dialog.
5. Click the dropdown by **Client**.
6. Search to select the client by last name.
7. Double-click the client row to enter it in the client dialog box.
8. Click the dropdown top right to select the **Navigation**.
9. Select **SC Self Service 1** Navigation.
10. Click the **Assign** button.
11. Click **Finish** at the bottom of the dialog.

## Assigning Client Navigation

**CUSTOMIZATION WIZARD**

**Currently Assigned Navigation**

<input type="button" value="Assign"/>	<input type="button" value="Unassign"/>	<input type="button" value="DEFAULT_NAVIGATOR"/>
<u>Company</u>	<input type="text"/>	<input type="button" value="▼"/>
<u>Department</u>	<input type="text"/>	<input type="button" value="▼"/>
<u>Client</u>	<input type="text" value="AFAKECLIENT"/>	<input type="button" value="▼"/>
		<input type="text" value="SC SELF SERVICE 1"/>

**Cancel** **< Back** **Finish** **Help**



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