Client Portal

Client Portal Guide

Logging into Client Portal

- Client Portal is accessed at https://central.allscripts.com
- If you don't have an account, you can easily create one by clicking "Sign up now" on the sign in page.
    - Provide the correct personal and organizational information
    - Once your account is processed, you will be able to update your password and access the site.

Important Client Portal information

- Passwords must be changed every 120 days
- Client Portal is compatible with Microsoft Edge, Google Chrome, and Mozilla Firefox.
- Client Portal training is available in Community University
- Some areas of Client Portal are restricted based on user permissions. Access can be requested via the Site Help menu.
- If you have a user ID but are unable to log in, please call 1-800-877-5678, then select option 1, option 1, then option 6.
- Client Portal will log a user out automatically after **20 minutes of idle time**, with a warning given 2 minutes prior to logout. This is in place for the security of the user.
- If you have Client Portal-related requests, please select the Client Portal/Client Admin catalog

Home page

The Client Portal home page is made up of Search, the Header and the Body.

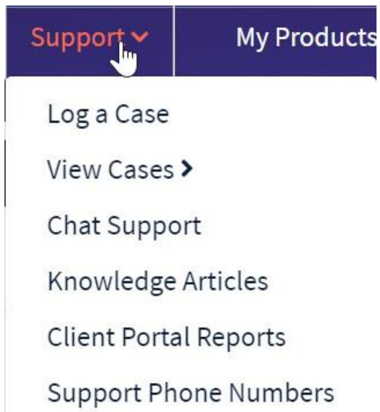
Search

The Search box allows you to search content in the Client Portal. You can customize your search to narrow down results. Training on searching can be found in Community University

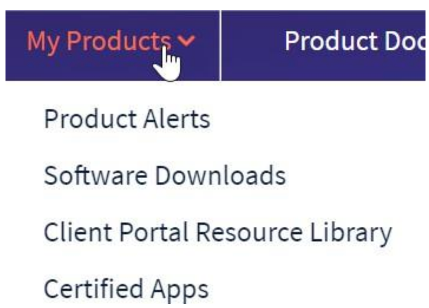
Header

The Header allows you to navigate to different areas in the Client Portal. Click the different links in the header and explore dropdown options.

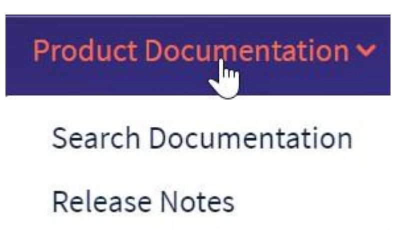
- **Support** dropdown options give you options to contact support, review Knowledge articles and report on Cases in Support using Client Portal Reports



- **My Products** gives you access to view important Product alerts pertaining to your product. If setup, these alerts are also sent to you via email. You can also access Software downloads tool to download updates to your Products if applicable.



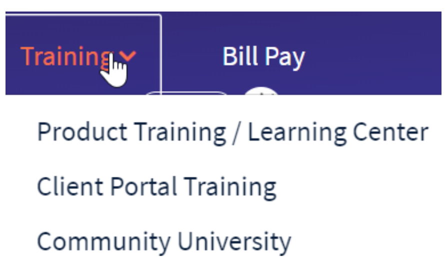
- **Product Documentation** gives you access to documentation like Release Notes for your Products. You can browse the portal by clicking on Product Documentation on the header, or by searching at the top of your screen.



- **Community** allows you to network with other users. Community Forums is our online community where you can network with other clients and employees in a range of forums related to products or special interests. Community users can ask questions, get advice from other users, sign up for important product alerts, log enhancement ideas, and access information about their products.

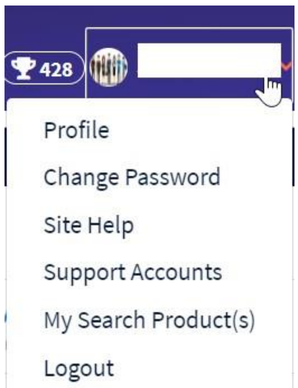
Notification preferences can be changed in the Subscriptions & Notification Preferences menu. Please note: by default, all members of a community are notified each time content is posted.

- **Training** link gains access to Product Training/Learning Center portal. Here, you can review self-paced courses. Client Portal Training and Community University provide additional resources on using the Client Portal



- **Bill Pay** is a permission-based link. Only those who have permission to access it will see this link in the header. If you have access, you can click on Bill Pay to go the portal to pay your bill with our company.

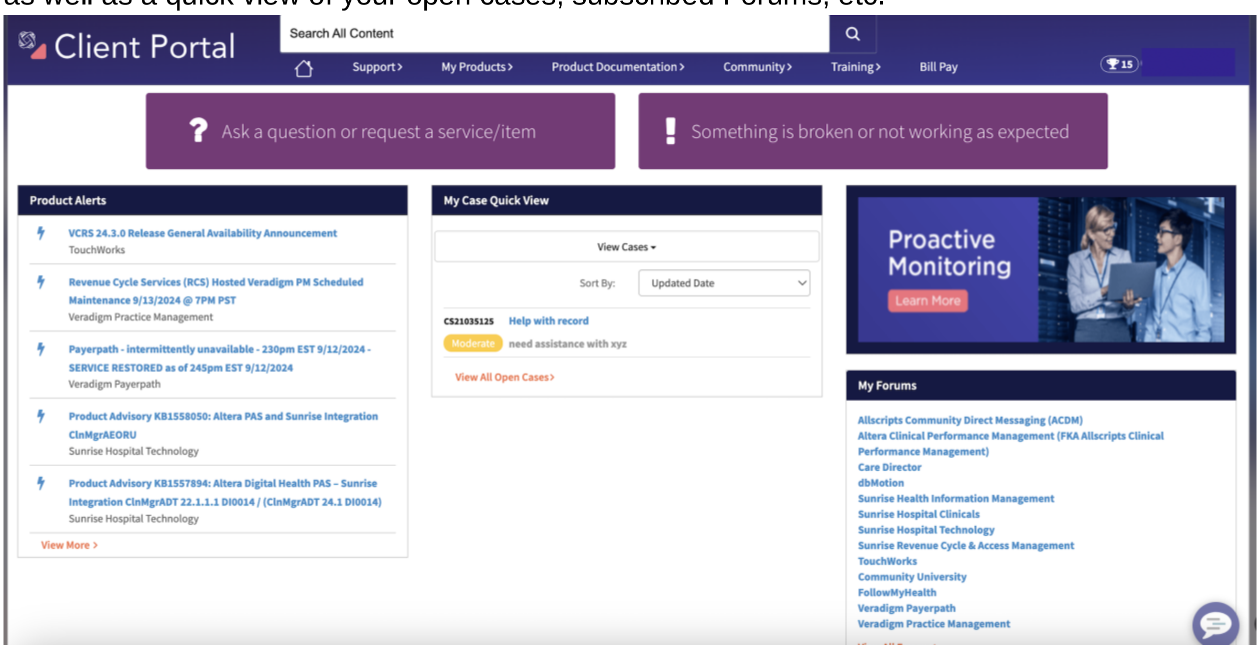
- Click on your name in the upper right to access your **Profile**. Profile allows users to manage search products, contact information, profile picture, and avatar. If you are a Client Admin, the Client Admin menu can be accessed from your Profile. Users can also access Site Help to view Client Portal Training, to request access to additional Client Portal applications, and submit Client Portal support tickets.



No matter where you navigate, you can get back home by clicking the upper left logo.

Body

The homepage body consists of different widgets to get assistance from Support and other departments, as well as a quick view of your open cases, subscribed Forums, etc.

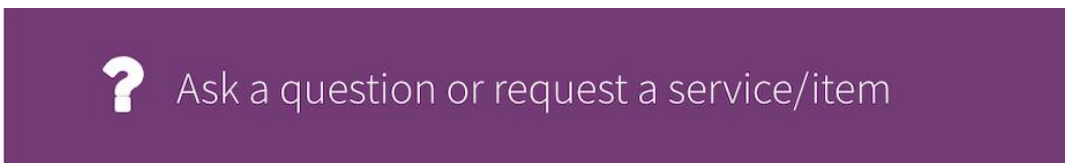


Client Portal

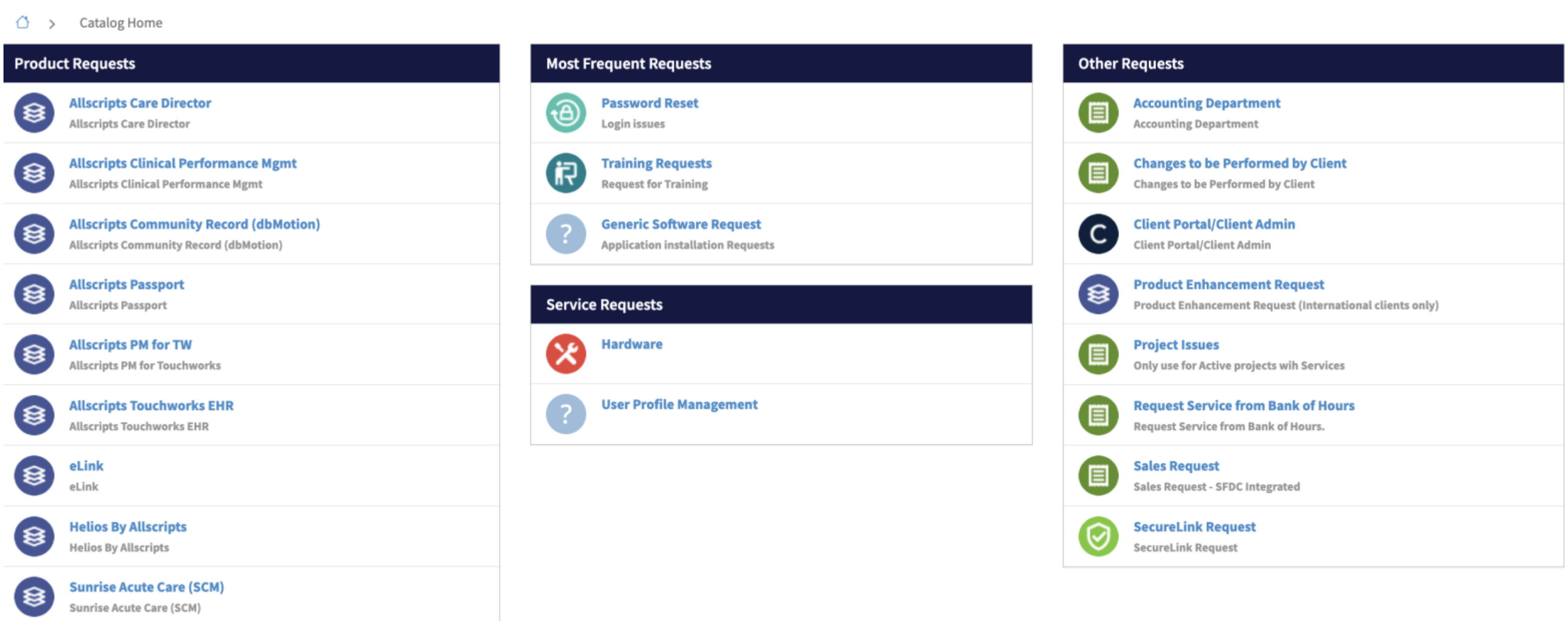
Logging a Case

You can log a case from the home page by selecting the Ask a question or request a service/item button, or the Something is broken or not working as expected button.

Select the Something is broken or not working as expected to log cases when something is broken, you are experiencing performance issues, or something is not working as expected.
Once you select the button you will navigate to the form to submit.



Select the Ask a question or request a service/item button to log a case for general inquiries, questions, password resets, project issues, requests for services or items including accounting, sales, or client portal requests.
Once you select the button you will navigate through a list of catalog items that you can select.
Note: Catalog items may vary based on the products and services you own.



If you have any questions or issues with the Client Portal, feel free to contact our Portal Support group at
1-800-877-5678