

Customer Panel - User Guide

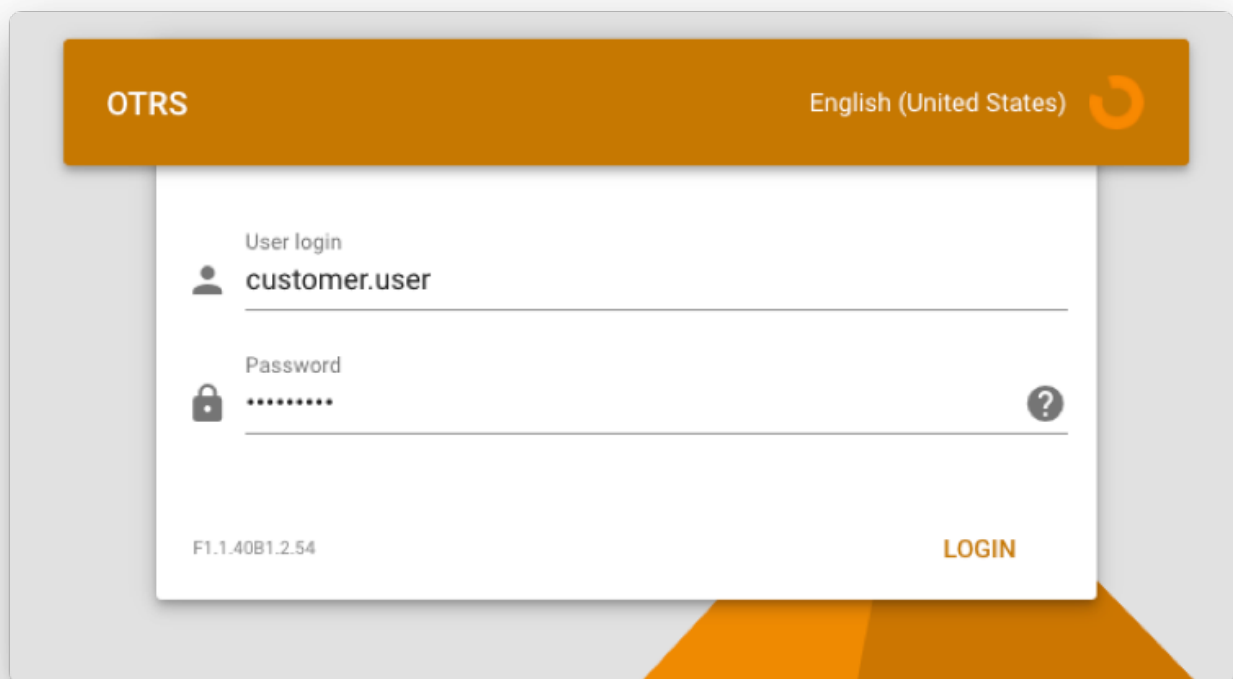
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Logging in

If you previously used the OTRS's Customer Panel you can log in to the new *Intalio Customer Panel* using the same credentials.

Login page address

The login page address may vary depending on how the system is implemented but usually it ends with **otrs/route.pl/customer-panel/login**.



The screenshot shows the OTRS login interface. At the top, there is an orange header bar with the text "OTRS" on the left and "English (United States)" on the right, accompanied by a circular refresh icon. Below the header is a white login form. The form has two input fields: "User login" with a user icon and the text "customer.user", and "Password" with a lock icon and a series of dots. A question mark icon is located to the right of the password field. At the bottom left of the form, the version number "F1.1.40B1.2.54" is displayed. At the bottom right, there is a prominent orange "LOGIN" button.

Forget your password?

If your administrator allows you to reset user passwords, you can use the password reset function. All necessary information will be sent to your e-mail.

OTRS

English (United States)



 User login

 Password



F1.1.4081.2.54

LOGIN

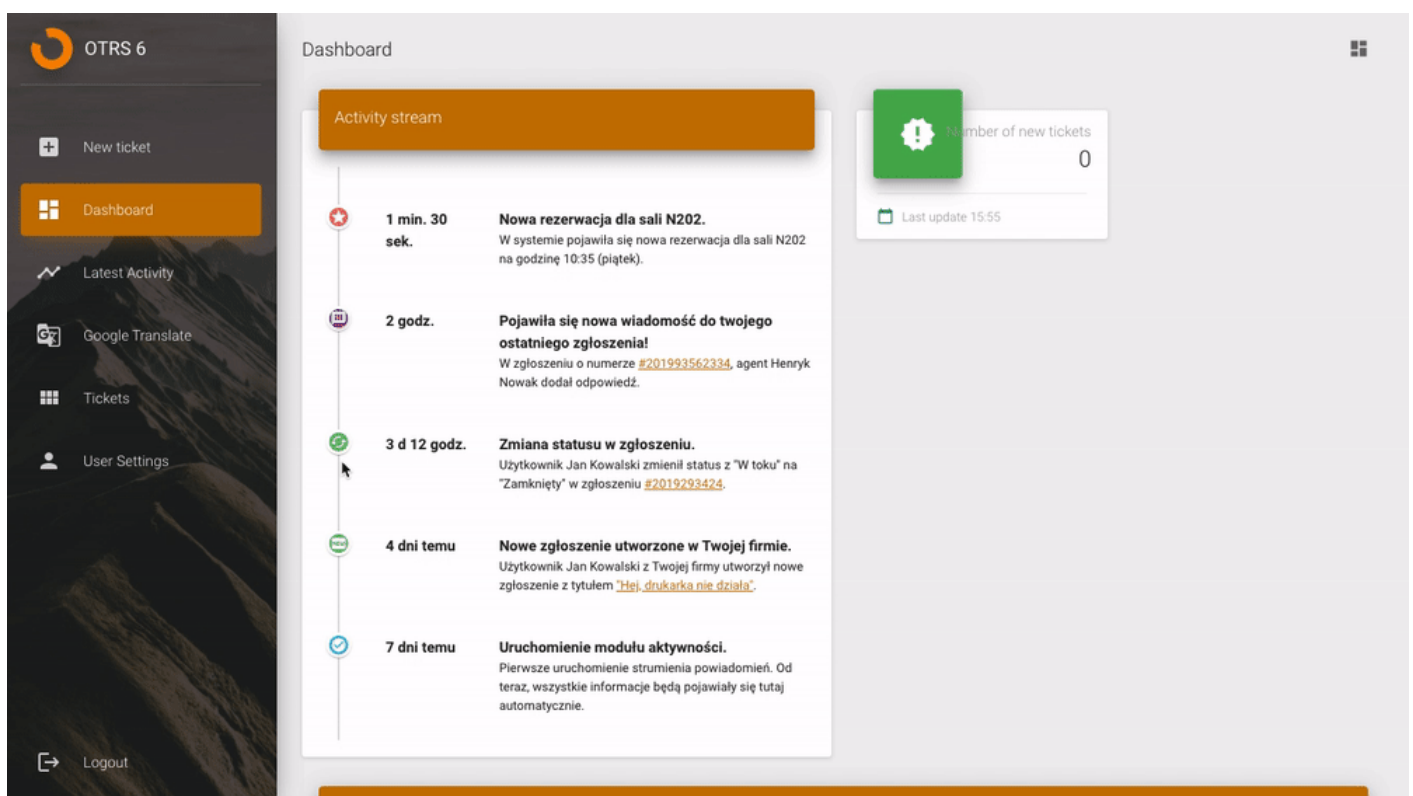
Navigating the customer panel

After logging in you will see two main elements of the client panel.

1. Main Menu
2. Selected module view

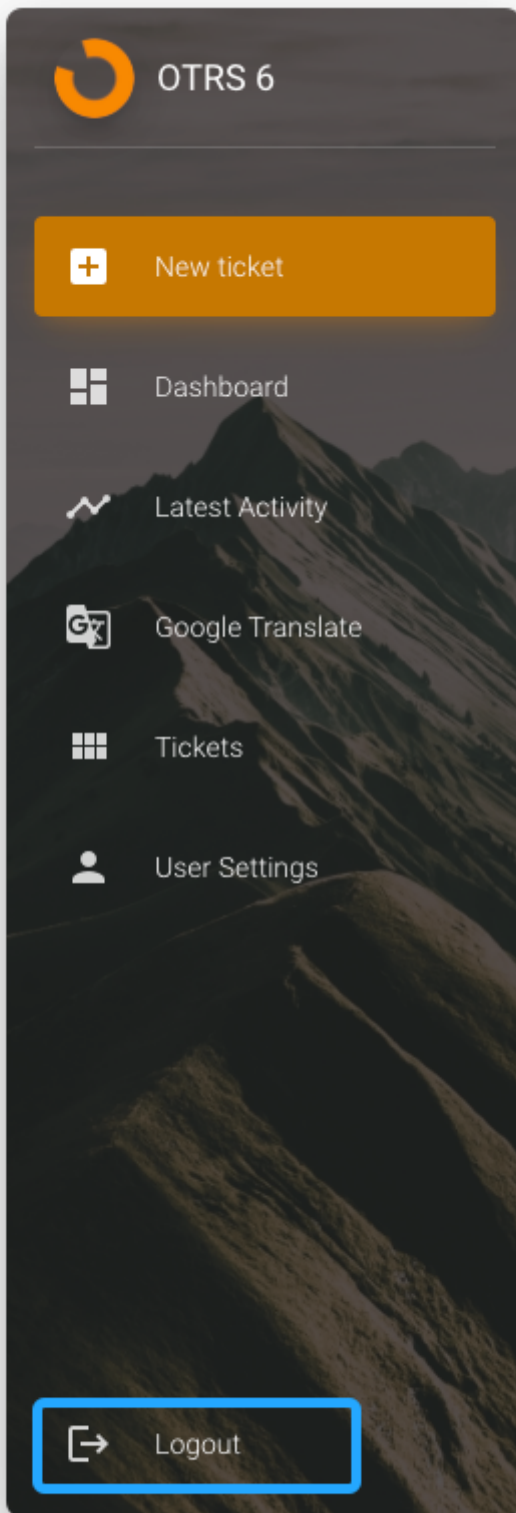
Main Menu

Click on one of the menu items to display the module.



Logout

You can find logout button at the bottom of the Main Menu.



Dashboard

The Dashboard module gives the user the ability to display only customer panel's elements that are important. Every change in the widgets on the dashboard (or in any other module) are saved in

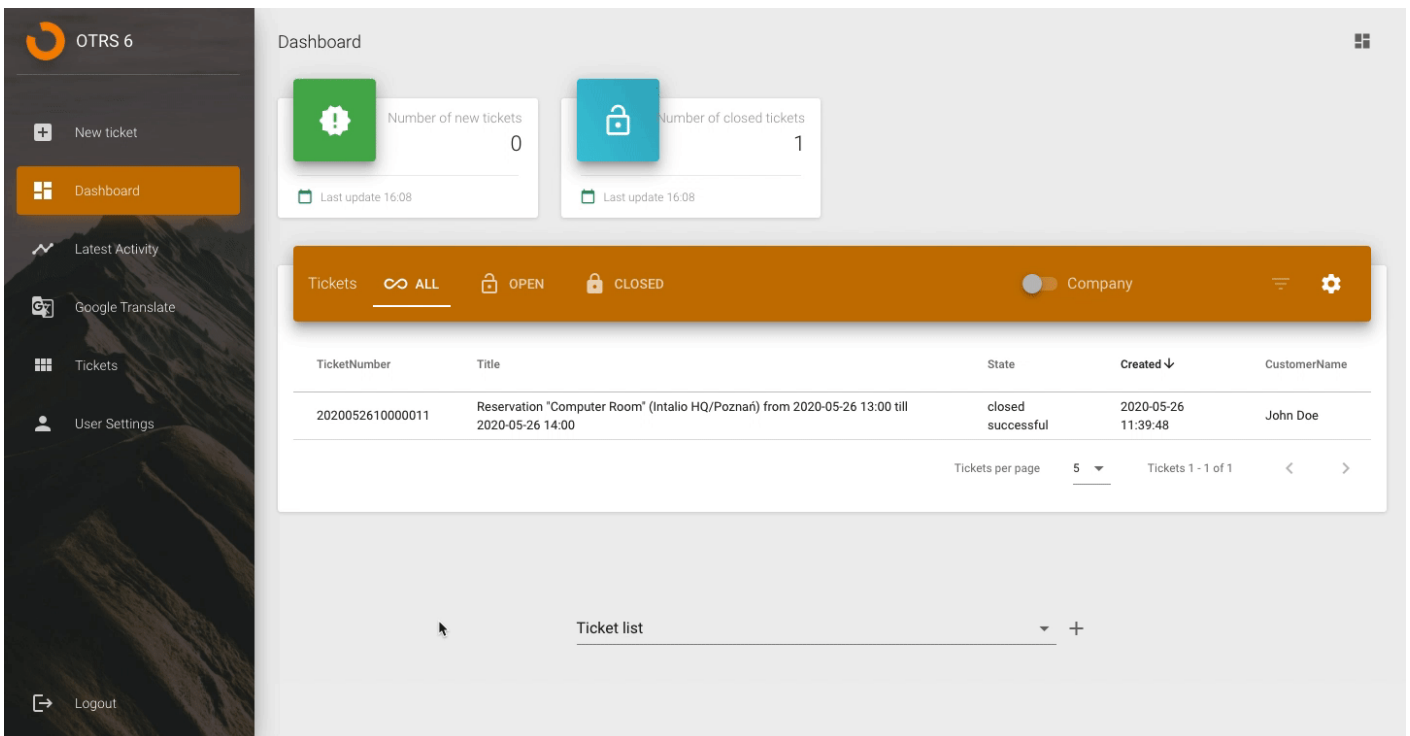
the user's preferences and will be loaded after the next login.

Adding widgets to the Dashboard



Organising widgets

User can organise widgets however he wants. Simply drag the widgets and drop elsewhere in the Dashboard's canvas.



Removing widgets from the Dashboard

Drag the widget to the red bar with trash icon to remove it from the system.

The screenshot displays the OTRS 6 dashboard interface. On the left is a dark sidebar with navigation options: 'New ticket', 'Dashboard' (highlighted), 'Latest Activity', 'Google Translate', 'Tickets', 'User Settings', and 'Logout'. The main content area is titled 'Dashboard' and features a top navigation bar with 'Tickets', 'ALL', 'OPEN', and 'CLOSED' filters, a 'Company' toggle, and a settings icon. Below this is a table with one ticket entry:

TicketNumber	Title	State	Created ↓	CustomerName
202005261000011	Reservation "Computer Room" (Intalio HQ/Poznań) from 2020-05-26 13:00 till 2020-05-26 14:00	closed successful	2020-05-26 11:39:48	John Doe

Below the table are two summary widgets: 'Number of closed tickets' (1) and 'Number of new tickets' (0), both updated at 16:08. At the bottom, there is a 'Ticket list' section with a dropdown arrow and a plus sign.