



# Helpdesk Support Portal

## USER GUIDE

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*Your guide to registering, accessing, and managing technical service requests through the new IBIS Helpdesk Portal.*

**Portal URL:** <https://helpdesk.ibis-management.com/tickets-view>

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# 1. Introduction to the Helpdesk Support Portal

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The IBIS Management Helpdesk Support Portal is a centralized platform hosted on HubSpot designed to streamline the submission and management of technical service requests. It facilitates clear and efficient communication between users and the IBIS support team, helping ensure timely and effective issue resolution.

**This user guide provides step-by-step instructions to help you:**

- Register and access the support portal.
- Navigate the system and utilize ticket management features.
- Submit, track, and manage your technical support requests.

## QUICK FACTS

**Hosted on:** HubSpot

**Portal URL:** <https://helpdesk.ibis-management.com/tickets-view>

**Invitation sender:** [noreply@ibis-management.com](mailto:noreply@ibis-management.com)

## 2. Getting Started: Registration and Sign-In

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### 2.1 Registration

Access to the portal is initiated through an email invitation. Look for an email with the following details:

**From:** noreply@ibis-management.com

**Subject:** You've been given access to content at helpdesk.ibis-management.com

**To establish your account, follow these steps:**

- 1** Open the invitation email in your inbox.
- 2** Click on the "Create Password" button.
- 3** You will be redirected to the registration page to set up your password.
- 4** Follow the prompts to create a unique password and finalize your account profile.



## Welcome to IBIS Management Associates Inc.

Complete your registration by creating a secure password for your account.

[Create password](#)

Or copy and paste this link into your browser:  
[helpdesk.ibis-management.com/hcms/mem/register](https://helpdesk.ibis-management.com/hcms/mem/register)

If you have questions or received this in error, please [contact the site's administrator](#)

*Invitation email "Welcome to IBIS Management Associates Inc."*

## Set up your password

Welcome! Complete your registration by setting up your password.

Email\*

Password\*

Password

Show

Password must be at least 12 characters long and include at least 3 of the following: a lowercase letter, an uppercase letter, a number, or a special character

Confirm password\*

Confirm password

Show

[Save password](#)

*Registration page*

*Upon successful password creation, the system will automatically generate a second confirmation email that confirms your account activation.*

**From:** noreply@ibis-management.com

**Subject:** Your password for content at helpdesk.ibis-management.com was saved



## **Your IBIS Management Associates Inc. password was successfully changed**

Didn't mean to make this change? Use the [forgotten password](#) form to reset your password now.

If you have questions, please contact the [site's administrator](#)

*Account activation confirmation email*

## 2.2 Sign-In Process

The portal is accessible at the URL shown below. We recommend bookmarking this URL for quick retrieval.

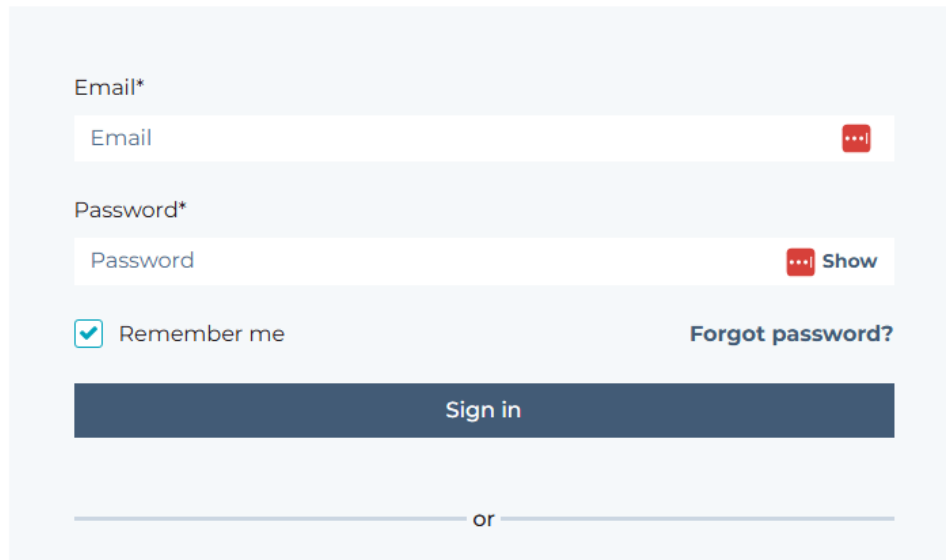
**Portal URL:** <https://helpdesk.ibis-management.com/tickets-view>

### To access your dashboard:

- 1 Navigate to the portal URL above.
- 2 Input your registered email address.
- 3 Input your password.
- 4 Click Sign In.

## Sign in

The page you are trying to view is only available to registered users.



The screenshot shows a sign-in form with the following elements:

- Email\***: A text input field containing the placeholder text "Email" and a red eye icon to toggle visibility.
- Password\***: A text input field containing the placeholder text "Password" and a red eye icon with the text "Show" next to it.
- Remember me**: A checked checkbox with the text "Remember me" to its right.
- Forgot password?**: A link located to the right of the "Remember me" checkbox.
- Sign in**: A dark blue button with the text "Sign in" centered on it.
- or**: A horizontal line with the word "or" centered below it, indicating an alternative sign-in method.

### *Sign-in page*

## 2.3 Password Recovery

If you are unable to access your account due to forgotten credentials, you may initiate a password recovery directly from the primary sign-in page.

### To reset your password:

- 1 Navigate to the portal sign-in page.
- 2 Click on "Forgot password".
- 3 Enter your registered email address and click Submit.



## Reset your password

Enter the email address you used to register and we'll send you an email with a link to reset your password.

An unexpected error occurred

Email\*

[Send reset email](#)

Did it just come back to you? [Sign in](#)

### *Password reset page*

Retrieve the reset instructions sent to your inbox. Clicking the link in the email will open the new password creation interface.



## Reset your password

Set a new password and sign in to your account.

[Reset password](#)

If you did not make this request, you can safely ignore this email.  
If you have questions, please [contact the site's administrator](#)

### *Password reset email*

#### **Create your new password:**

- 1** Enter your new password.
- 2** Confirm the new password in the secondary field.
- 3** Save the changes to restore account access.



## Create new password

Your new password must be different from your previously-used password.

New password\*

New password Show

Password must be at least 12 characters long and include at least 3 of the following: a lowercase letter, an uppercase letter, a number, or a special character

Confirm new password\*

Confirm new password Show

Save password

*New password creation screen*

# 3. Navigating the Ticket Dashboard

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The ticket dashboard is your home base inside the portal. From here you can search for tickets, filter by status, view tickets created by you or by your organization, export records, and create a new ticket.

## The dashboard allows you to:

<b>1. SEARCH</b> Locate specific records by entering the ticket Subject or the unique Ticket ID number.	<b>2. VIEW BY OWNER</b> Switch between "Owned by me" (tickets you personally initiated) and "Owned by organization" (all tickets submitted by any authorized user within your company).
<b>3. STATUS FILTERS</b> Filter your view by All, Open, or Closed tickets to focus only on what you need.	<b>4. EXPORT TO CSV</b> Generate a physical CSV report of your ticket list for offline analysis or sharing.
<b>5. TICKET LIST</b> See key information at a glance: ticket name, status, owner, and date.	<b>6. CREATE TICKET</b> Open a new support ticket directly from the dashboard with one click.

## Tickets

1. Search tickets by Subject or ID

2. View Owned by me

3. Status All

5.

Subject	Requested By	Created	Ticket Owner	Last Activity	Status

*Ticket dashboard overview*

## 4. Creating a New Ticket

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To formally initiate a technical request, follow these steps:

- 1** Click on the "File a Support Ticket" button on the dashboard.
- 2** Fill in all required fields (see field list below).
- 3** Attach relevant screenshots, logs, or documents to the Attachments section for immediate context.
- 4** Click Submit.

### Required Fields

Field	Description
<b>First Name &amp; Last Name</b>	Your full name as it should appear on the ticket.
<b>Email</b>	Your registered email address for ticket correspondence.
<b>Product</b>	Select one: Alchemy, Entrust, SWISSRoute, AMLtrac.
<b>Ticket Name</b>	A short, descriptive title for your request.
<b>Ticket Description</b>	A detailed description of the issue or request.
<b>Priority</b>	Select one: Urgent, High, Medium, Slow.
<b>Attachments</b>	Add any screenshots, logs, or supporting documents.

## File a Support Ticket



Please fill out the form and we'll get back to you as soon as possible.

**First Name\***

**Last Name\***

**Email\***

**Product\***

**Ticket name\***

**Ticket description\***

**File upload**  
 No file chosen

**Priority**

[File a Support Ticket](#)


### *Ticket list information*

< View all


## Example subject

4. [Open - New](#) [Mark as closed](#)

1. #123


- 2.
-  HubSpot User May 18, 2026  
Here is an example reply from the Conversations Inbox

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  -  Customer May 18, 2026  
Here is an example reply from Customer Portal

3.

Write a response...

 [Send](#)

[File a Support Ticket](#)

*File a support ticket form*

## 5. Ticket Details

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Selecting an individual ticket from the dashboard opens the Ticket Detail view, where you can review the full conversation history and continue the dialogue with our support team.

### The Ticket Detail view contains:

- 1** **TICKET NUMBER** A unique identifier for tracking and referencing your request.
- 2** **CONVERSATION HISTORY** A chronological log of all communication between you and the support team.
- 3** **UPDATING A REQUEST** Use the "Reply" feature within the ticket details page to respond to support inquiries or provide additional information.
- 4** **STATUS** Current state of the ticket indicated as either Open or Closed.

## Need Further Assistance?

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### We're here to help.

If you have any difficulties accessing or using the portal, please contact your IBIS account representative or call the IBIS Helpdesk for assistance.

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