

A photograph of three workers in a warehouse. They are wearing yellow hard hats and high-visibility safety vests. One worker is holding a laptop, and the other two are looking at it. The background shows tall stacks of boxes in a warehouse setting.

How to Make the Most of Our Client Portal

Your FAQ Guide

Our client portal is a powerful tool that enhances and streamlines your experience. It offers a range of features, each designed to bring you closer to our services. From service requests that expedite your needs to a personalized dashboard that keeps you updated, technical support that ensures smooth operations to messaging that fosters direct communication, and a resource library that equips you with knowledge, our client portal is a gateway to maximizing the value of our services.

This guide is intended to answer your questions. Please get in touch with us if you need further assistance.



Your Guide to Maximizing Our Client Portal Features

- **Portal Access Home Page:** <https://portal.cimsoft.com>

- **How do I log-in for the first time if I am an existing Cimsoft Customer or I forgot my password; how can I reset it?**

- Click the Login button in the upper right from the Portal Access Home Page. At the Initial login Prompt, click 'Don't remember your password?'. The reset email will come from clientportalsupport@insourcess.com in case you need to release from your Spam filter.



- **What are the requirements for a new password?**
 - No more than two identical characters in a row
 - Special characters (!@#\$\$%^&*)
 - Lower case (a-z), upper case (A-Z), and numbers (0-9)
 - Must have eight characters in length
 - Non-empty password required
- **How can I create a new account in the client portal?**
 - A new contact may be created by using the "Connect with Us" form on the Portal Access Home Page
- **What services can I access in the client portal?**
 - Invoices with Electronic Pay
 - Estimates with Link to Quotation Portal
 - Support Cases (Authorized Support Clients)
 - Historical
 - Add New Cases
 - Current Cases
 - See Status
 - Message with Support
 - Chat with Technical Support 8:30 a.m. – 4:30 p.m. EST.

Your Guide to Maximizing Our Client Portal Features

- **How do I get Portal Support?**
 - Portal support is provided through our dedicated Portal Support email at clientportalsupport@insourcess.com Support is available 8:00 a.m. to 5:00 p.m. EST Monday through Friday (excluding holidays).
- **Can I have access to more than one account?**
 - A contact can access any company they are related to through support cases but will only be able to see detailed information and transactions for their primary assigned company.
- **How can I update my contact details in my profile?**
 - Details can be updated from the Settings menu. Email preferences, passwords, phone numbers, and addresses can be updated.
- **Why can't I remove some information from my profile?**
 - Some information is only available for administrators to modify, and you may contact us at clientportalsupport@insourcess.com
- **Where do I see my subscriptions and contracts?**
 - They are available upon request through your subscription mgr. or account mgr. through the 'Your Account Team' menu.
- **I need to renew my subscription or support agreement?**
 - You may request subscription or support agreement guidance by sending a message to an Account Team member on the 'Your Account Team' page.
- **How do I request an upgrade; where can I do that?**
 - Please use the Upgrade form link on the Portal Access Home Page, or go to <https://cimsoft.com/tech-support/>

Why Cimsoft?

Cimsoft is your adept partner, providing the insight, experience and expertise to help businesses like yours drive continuous improvement initiatives — with proven world-class solutions. Today, those solutions are at work within some of the world's largest and most complex manufacturing environments.

