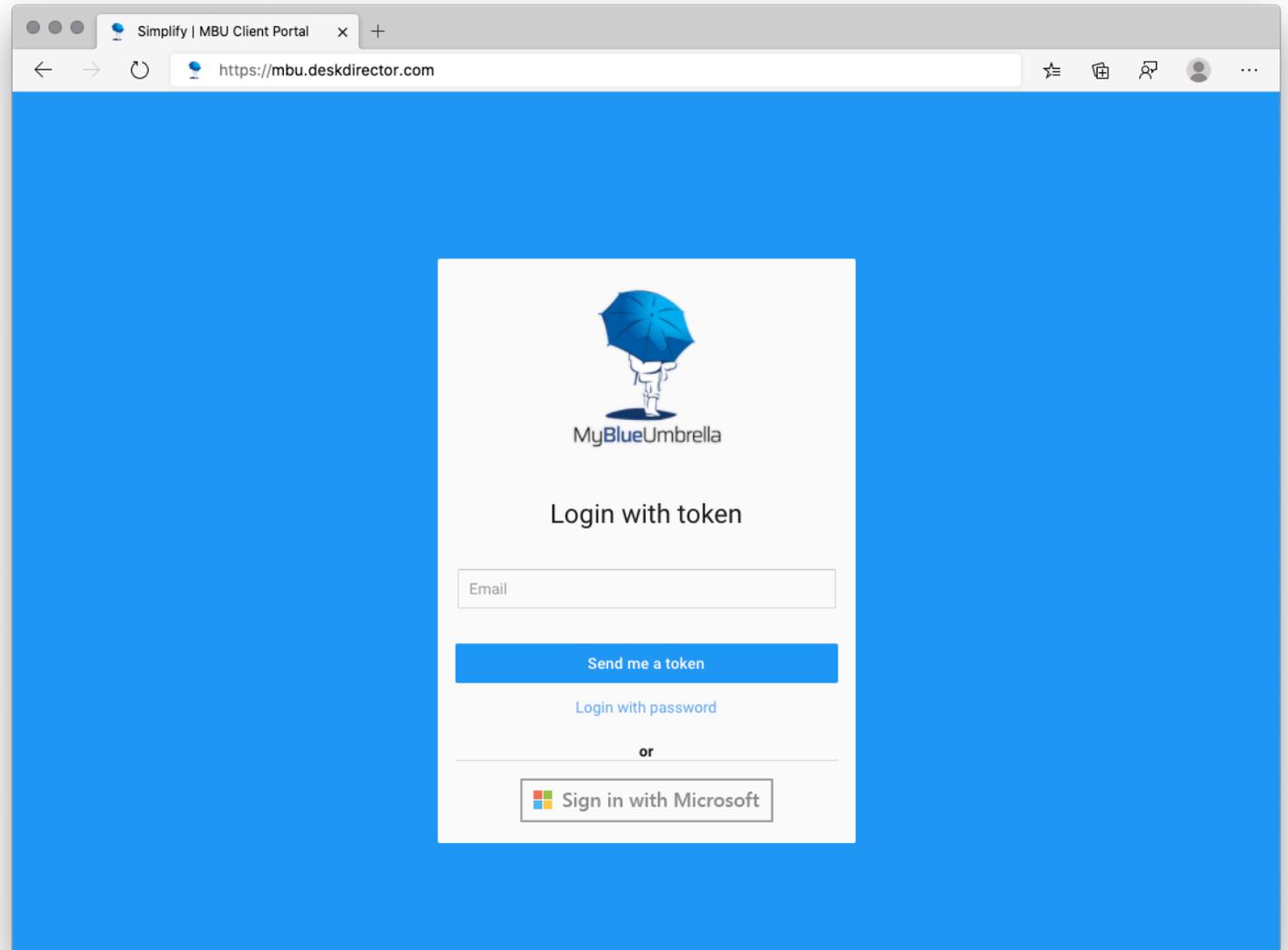
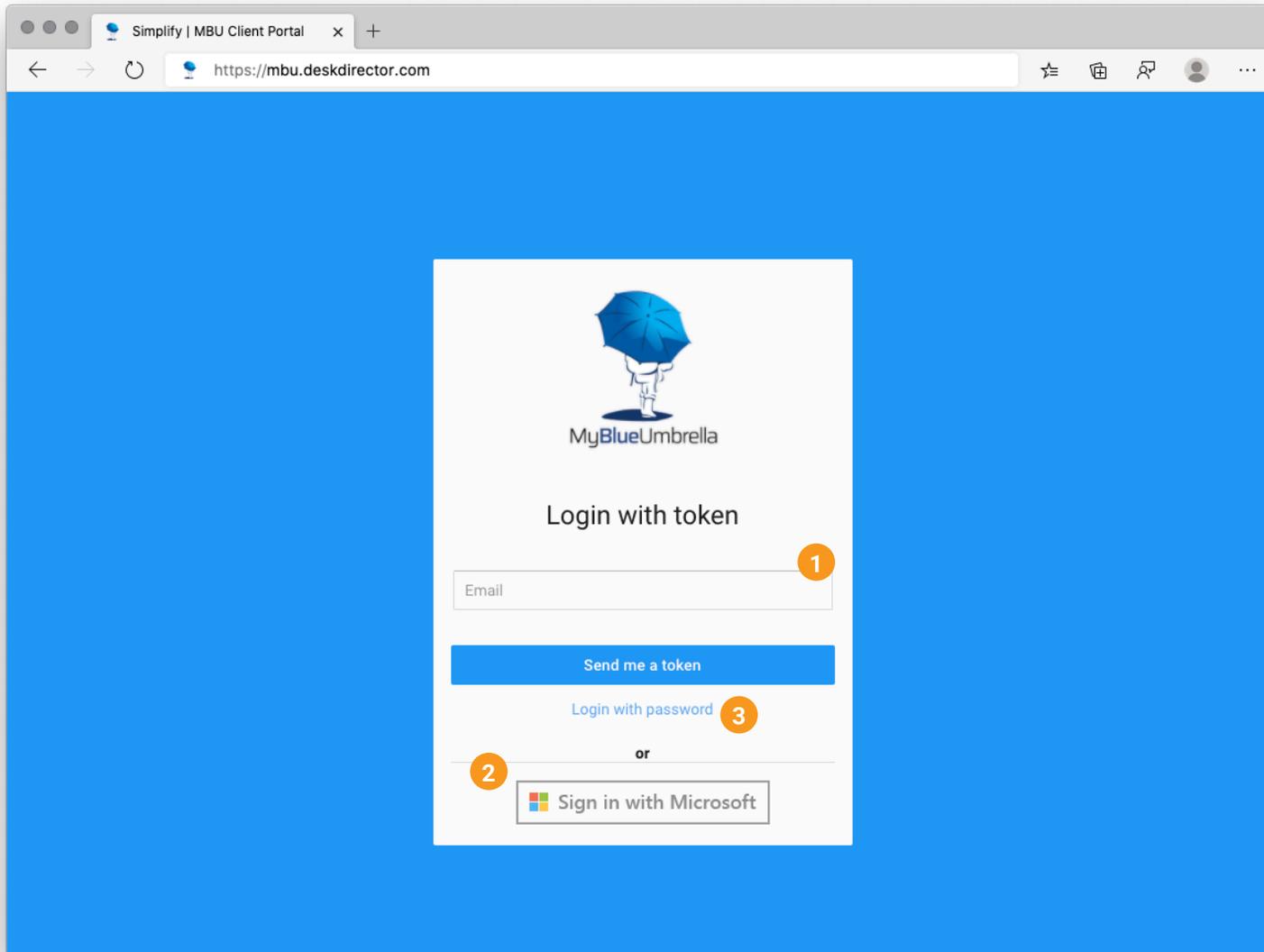


# Welcome to **SIMPLIFY** the MBU Client Portal

The new best way to get support

<https://mbu.deskdirector.com>



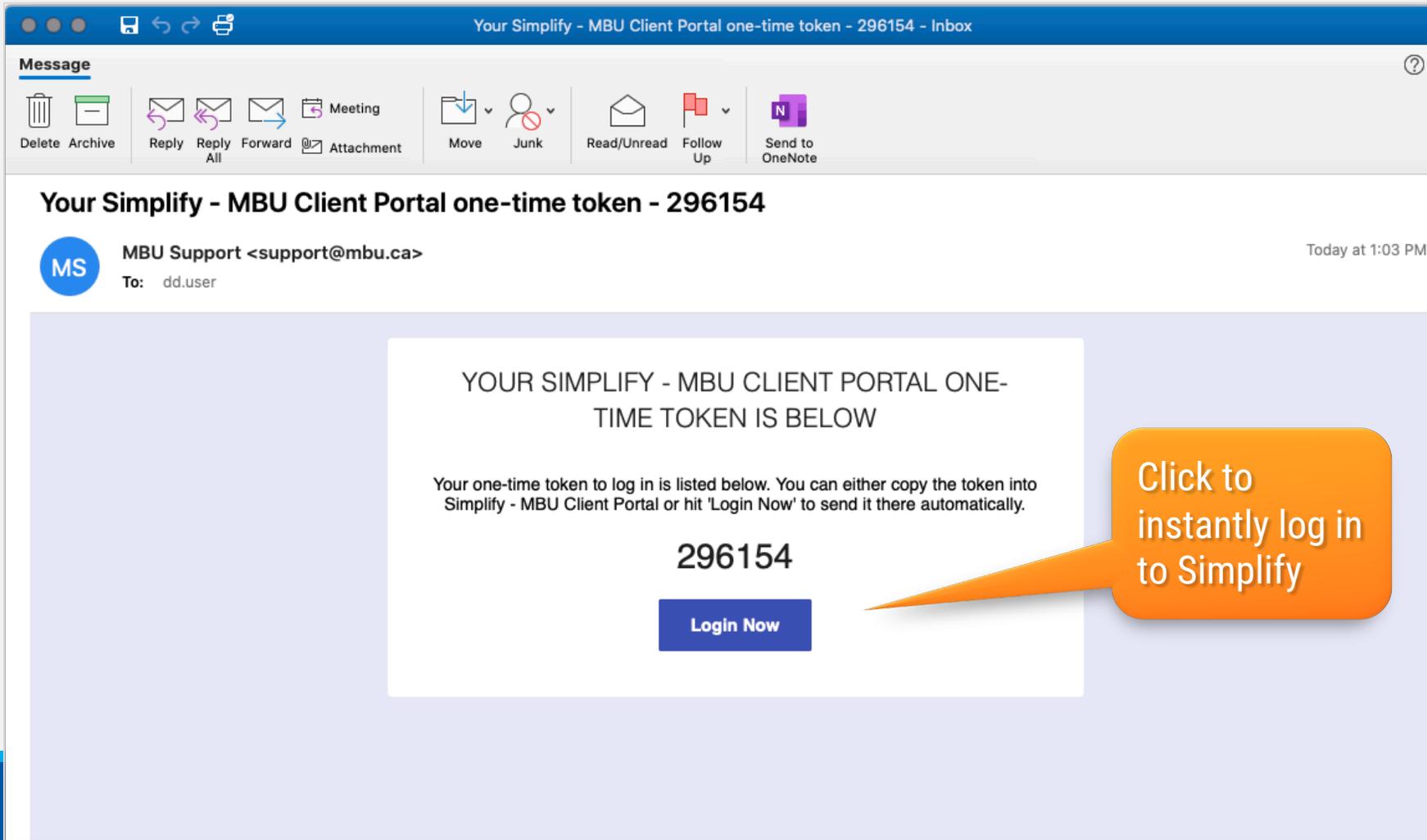


## Login Options

1. Enter your email address and receive a message with a unique token to log in automatically
2. Sign in with your Office365 account for a Single Sign-On experience
3. Log in with a username and assigned password.

NOTE: We will try to make it easy for you. Based on your set up any of the options will be availed to you

# Email with a unique token example



The screenshot shows an email client interface. At the top, the subject line reads "Your Simplify - MBU Client Portal one-time token - 296154 - Inbox". Below this is a "Message" header with various action icons: Delete, Archive, Reply, Reply All, Forward, Attachment, Meeting, Move, Junk, Read/Unread, Follow Up, and Send to OneNote. The email content starts with the subject "Your Simplify - MBU Client Portal one-time token - 296154" and is from "MBU Support <support@mbu.ca>" to "dd.user", dated "Today at 1:03 PM". The main body of the email contains the following text:

YOUR SIMPLIFY - MBU CLIENT PORTAL ONE-TIME TOKEN IS BELOW

Your one-time token to log in is listed below. You can either copy the token into Simplify - MBU Client Portal or hit 'Login Now' to send it there automatically.

**296154**

[Login Now](#)

An orange callout bubble points to the "Login Now" button with the text: "Click to instantly log in to Simplify".

# How to request support

The screenshot displays the 'Simplify - MBU Client Portal' interface. The top navigation bar includes the text 'Simplify - MBU Client Portal' on the left, 'Account: MBU Demos' with a dropdown arrow in the center, and a notification bell and a profile icon on the right. The left sidebar features the 'MyBlueUmbrella' logo (an umbrella on a person's back) and a menu with 'Contact Support' (highlighted in blue), 'Tickets', 'Learning', and 'Notifications'. The main content area is titled 'Request Support' and contains a 'Create a New Ticket' section. This section includes the heading 'Create a New Ticket', the instruction 'Fill out a form for something specific or give us a brief description of your issue.', and a blue button labeled 'Create a New Ticket'. To the right of this text is a large circular icon of a clipboard with a checklist and a pen. An orange callout bubble with a white border points to the 'Create a New Ticket' button, containing the text 'Click here to create a new ticket'.

# Choose a category, if applicable...

Simplify - MBU Client Portal Account: MBU Demos  

 MyBlueUmbrella

 Contact Support

 Tickets

 Learning

 Notifications

Request Support > Ticket Categories

**Create a New Ticket**  
Select an option below.

[Cant find anything?](#) [Something Else](#)

No.	Option Name	
1	Staff Changes	
2	Email-Related	
3	General	

We can customize them to meet your business needs

# Drill down to a specific option...

Simplify - MBU Client Portal Account: MBU Demos  

 MyBlueUmbrella

 Contact Support

 Tickets

 Learning

 Notifications

Request Support > Ticket Categories > Staff Changes

**Create a New Ticket**  
Select an option below.

[Cant find anything?](#) [Something Else](#)

No.	Option Name	
1	Onboarding	>
2	Offboarding	

After selecting the relevant category, you can drill down and choose different options

# Choose a category, if applicable...

Simplify - MBU Client Portal Account: MBU Demos  

 MyBlueUmbrella

 Contact Support

 Tickets

 Learning

 Notifications

Request Support > Ticket Categories

**Create a New Ticket**  
Select an option below.

[Cant find anything?](#) [Something Else](#)

No.	Option Name	
1	Staff Changes	<a href="#">&gt;</a>
2	Email-Related	
3	General	

If the available options don't suit your type or request, you can always select "Something Else"



Contact Support

Tickets

Learning

Notifications

Request Support > Ticket Categories > Something Else

### Something Else

Give us a brief description of your request

#### Summary

Enter a few words describing your request

#### Description

Enter more details about your request

Here is where you write your support request. We'll prefill it with required questions to help you log a ticket with all the necessary information

You can attach files as well

[Click to paste images from clipboard](#)

Attach Files

Submit



Contact Support

Tickets

Learning

Notifications

Request Support > Ticket Categories > Staff Changes > Onboarding

New User's Full Name \*

Your Answer

New User's Email Address \*

Your Answer

New User's Phone Number

Telephone number and extension where they should be contacted

Your Answer

Copy from another user?

Are they replacing or mirroring an existing/previous user? \*

Additional details will appear based on your choice

- brand new user
- replace existing/previous user
- mirror existing/previous user

Some tickets will consist of a form to fill in to make it even easier to get the most accurate information from you, and solve your ticket as fast as possible!

Simplify - MBU Client Portal Account: MBU Demos

Tickets / Looking for some help with Excel #551304



Contact Support

Tickets

Learning

Notifications

**Ticket Owner**  
DU DD User

**Assigned Technicians**

**CC**  
cdandrea@mbudemos.com

**Ticket Details**

**Priority**  
Priority 3 - Medium

**Status**  
New (dd) >

**Board**  
MBU - Support

**Ticket Number**  
551304

**Date Created**  
Apr 14, 2020 4:40:41 PM

**Last Updated**  
Apr 14, 2020 4:40:43 PM

### Looking for some help with Excel

Print

DU DD User added a note Today at 4:40 PM

**Are you making this request on behalf of someone else?**

- Please contact me directly

**Please provide as much detail as possible**

When I attempt to make a database connection, Excel crashes

**Optional Information**

DU DD User uploaded  Screen Shot 2020-04-14 at 4.40.04 PM.png Today at 4:40 PM

END OF TIMELINE

Reply Close Ticket

Write your reply here

Attach Files

Reply

See ticket details, e.g. people working on your ticket, board, priority, ticket number

You will also see a quick notification on every ticket update

You can update a ticket here, add a note, and close it



**Ticket Update**  
Ticket 551304 updated. Status is now Closed – Do Not Send Email  
Google Chrome • mbu.deskdirector.com

# My/All Tickets, Open/Closed Tickets

The screenshot displays the 'Simplify - MBU Client Portal' interface. The browser address bar shows the URL 'https://mbu.deskdirector.com/portal/v2/tickets'. The page header includes the portal name and a user account 'Account: MBU Demos'. A left-hand navigation menu contains 'Contact Support', 'Tickets', 'Learning', and 'Notifications'. The main content area is titled 'Tickets' and features a search bar, a 'Sort by: Newest first' dropdown, and filter buttons for 'My tickets' and 'Open tickets 2'. Two tickets are listed: one titled 'Looking for some help with Excel #551304' created at 4:40 PM, and another titled 'John Doe is starting on Monday #551285' created at 2:54 PM. Three orange callout boxes provide instructions: one points to the 'My tickets' filter, another points to the ticket list, and a third points to the ticket details area.

View your tickets or all company's tickets \*

You will see all your open and closed tickets here

Drill down to a ticket timeline and stay informed about your ticket progress

\* Based on your permission level

Simplify - MBU Client Portal Account: MBU Demos

Tickets / Need some major help with this one #551311



Contact Support

**Tickets**

Notifications

**Ticket Owner**

DD FastTrack Change

**Assigned Technicians**

CC: cdandrea@mbudemos.com

**Ticket Details**

**Priority**  
Priority 3 - Medium

**Status**  
New (dd) >

**Board**  
MBU - Support

**Ticket Number**  
551311

**Date Created**  
Apr 14, 2020 9:15:14 PM

**Last Updated**  
Apr 14, 2020 9:15:16 PM

**Need some major help with this one**

DD FastTrack added a note Today at 9:15 PM

**Are you making this request on behalf of someone else?**

- Please contact me directly

**Optional Information**

---

END OF TIMELINE

Reply **FastTrack Ticket** Close Ticket

Sorry, it looks like this is going to need some special attention

Attach Files **FastTrack Ticket**

Click here to go back to the request page

Or choose from the menu

Click here to FastTrack your ticket if it needs to be escalated \*

\* Based on your permission level



Contact Support

Tickets

Learning

Notifications

Tickets / Not an emergency, but... #551312

Ticket Owner

**DU** DD User  
Change

Assigned Technicians

CC

cdandrea@mbudemos.com

Ticket Details

**Priority**  
Priority 3 - Medium

**Status**  
> Cancelled

**Board**  
MBU - Support

**Ticket Number**  
551312

**Date Created**  
Apr 14, 2020 9:40:52 PM

**Last Updated**  
Apr 14, 2020 9:41:23 PM

Not an emergency, but...

Print

**DU** DD User added a note Today at 9:40 PM

**Are you making this request on behalf of someone else?**

- Please contact me directly

**Optional Information**

**DU** DD User added a note Today at 9:41 PM

never mind, not really needed

[Show more](#)

**System** uploaded MBU Ticket #551312/ UPDATED / Not an emergency, but....eml Today at 9:41 PM

END OF TIMELINE

Reopen Ticket

I forgot, I actually need this before end of week. Please help out

Attach Files

You can reopen a closed ticket and add an optional comment when doing so \*

Reopen Ticket

\* If re-opened within 7 days of closing

Simplify - MBU Client Portal Account: MBU Demos

Tickets / Mickey is starting on May 1st #551314



MyBlueUmbrella

- Contact Support
- Tickets
- Approvals (1)**
- Notifications

**Ticket Owner**  
DU **DD User**  
Change

**Assigned Technicians**

**CC**  
cdandrea@mbudemos.com

**Ticket Details**

**Priority**  
Priority 3 - Medium

**Status**  
Approval Required (dd)

**Board**  
MBU - Support

**Ticket Number**  
551314

**Date Created**  
Apr 14, 2020 10:21:20 PM

**Last Updated**  
Apr 14, 2020 10:21:21 PM

**Basic New User info**

**New User's Full Name**  
Mickey Mouse

**New User's Email Address**  
mmouse@mbudemos.com

**Copy from another user?**

**Are they replacing or mirroring an existing/previous user?**

- brand new user

**Hardware Requirements**

**Choose an option**

- Use existing hardware

**Use existing hardware**

- desktop computer

**Description of existing hardware**  
MBUDEMOS-LT-013

**Optional Information**

---

**Approval Required**  
This ticket requires approval before it can proceed

Decline Approve

Reply Close Ticket

Write your reply here

Attach Files Reply

If you are an approver, you will see Approval Statuses and Notifications here

Approve work before it is performed