



Gestisoft

Customer Success Portal

Documentation EN

2026

Welcome!

We're happy to welcome you to your dedicated space for managing requests and tracking services.

Take a few moments to explore the available features and make the most of the tools designed to support your success.

Introduction

PROJECT CONTEXT

To enhance the client experience and centralize essential tools for success, we've designed a new support portal that is modern, intuitive, and easy to use.

This site brings together all the necessary features to submit requests, track their progress, and access helpful resources in a clear and user-friendly interface.



To make support even more accessible and responsive, we've integrated Copilot's artificial intelligence technology. This innovation allows users to quickly get answers to their questions, benefit from smart assistance in managing incidents and service requests, and gain autonomy while still being supported by our team.



Summary

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Login and Access

SIMPLIFIED LOGIN, NO ADDITIONAL ACCOUNT REQUIRED

1

EMAIL

After receiving your invitation email to the portal, click the button "Access the portal".

2

REGISTRATION

On the registration page, click the button "Register" and use the same email address that received the invitation.

3

AUTHENTICATION

When signing in, use the password associated with your email (no new password is required). The portal uses Microsoft authentication with two-step verification through Microsoft Authenticator.

What can you do on the portal?

- ✓ Track your incident and service requests
- ✓ Access resources to enhance your experience
- ✓ Benefit from simplified and intelligent support powered by Copilot

How to get started?

1. Click the link below to register :

[Access the portal](#)

2. Follow the login steps.

3. Explore your personalized space !

→ Sign in Redeem invitation

Sign up with an invitation code

* Invitation code

I have an existing account

[Register](#)

Gestisoft

Se connecter

E-mail, téléphone ou identifiant Skype

[Votre compte n'est pas accessible ?](#)

[Suivant](#)

[Options de connexion](#)

Gestisoft

pradeepg_M365v63945957.onmicrosoft.com#EXT#@gs...

✓ Authenticator Added

Vous pouvez maintenant utiliser Microsoft Authenticator pour approuver les connexions, obtenir des codes uniques, etc.

Il s'agit maintenant de votre méthode de connexion par défaut.

[Terminé](#)

Home - Customer Success Gestisoft / Profile - Customer Success Gestisoft

Profile - Customer Success Gestisoft

Demo Gestisoft

Your information

| | | | |
|--------------|-------------------------------------|----------------|---|
| First Name * | <input type="text" value="Demo"/> | Last Name * | <input type="text" value="Gestisoft"/> |
| Company Name | <input type="text" value=""/> | E-mail | <input type="text" value=""/> |
| Language * | <input type="text" value="French"/> | Business Phone | <input type="text" value="Provide a telephone number"/> |

[Update](#)



Types of Requests

SOLUTIONS ACCORDING TO YOUR NEEDS

In the support portal, two main types of requests can be submitted: incidents and service requests. It's important to distinguish between them to ensure fast and appropriate handling.

✓ An **incident** refers to any technical issue or service interruption that could impact your productivity. Our dedicated team ensures each incident is handled quickly to restore your work environment without delay.

✓ A **service request**, on the other hand, allows you to access new features, personalized adjustments, or specific support. Whether you're looking to enhance your experience or explore new possibilities, our portal offers you simplified access to everything you need to succeed.

Virtual Assistant

COPILOT

A chatbot is available at the top of the home page to assist you with your requests. This bot, powered by artificial intelligence, will aim to facilitate access to information and simplify the creation of requests.

The virtual assistant aims to reduce processing times and improve access to quick answers, while remaining complementary to the support team. It is available at all times, directly from the portal interface.

The AI assistant is designed to answer questions related to Microsoft products (Business Central, CRM, Customer Service, Field Service, and Power Platform modules).

Please note that Légio and Civio products are not currently covered.

In practical terms, the assistant is very useful for understanding functionalities, configuration, best practices, documented updates, and navigate available options.

If none of the answers meet your needs, the assistant will suggest opening a support ticket directly with our technical team.

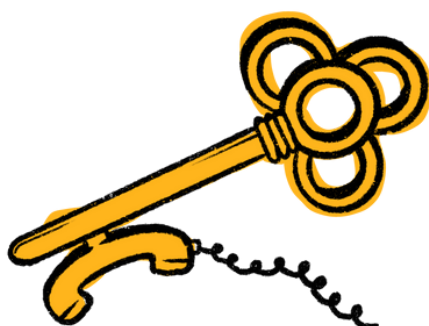
**Towards an ambitious future,
driven by innovation and passion.**

- ✓ **Continuous availability**
- ✓ **Time-saving**
- ✓ **Guided creation**
- ✓ **Simplified navigation**
- ✓ **Complementary support**

Integrity, innovation,
and commitment : the
pillars of our approach.

Navigation

HOME AND SUPPORT PAGES



The Customer Success Portal is designed to provide a smooth and intuitive experience.

From the homepage, you can access the main sections: *Incident* and *Service Request*. These options allow you to report an issue, submit a request, or view information related to your organization all from a single, central point.

Gestisoft Portail Succès Client

Accueil | Support | Licences | Q | Français | Daphné Bastien

Support
Incident
Demande de service

The *navigation bar*, located at the top of the screen, guides you throughout your journey. It gives access to the following sections:

- **Home** : return to the main page anytime
- **Support** : view, modify, and create incidents or service requests
- **Licenses** : view Microsoft licenses linked to your company
- **Language** : choose between French and English
- **User Profile** : manage your personal information

A dedicated area for frequently asked questions, called **the support page**, is also available. Here you'll find clear explanations of the portal's features and answers to the most common questions. The entire navigation has been designed to help you quickly find what you're looking for.



Navigation

INCIDENTS AND SERVICE REQUESTS

The **Incidents** and **Service Requests** pages share a common structure, designed to make it easier to track and manage your requests. You'll find an interface that allows you to view, edit, and create requests independently.

FILTER AND SORT REQUESTS

The main list displays all incidents or requests, with the ability to filter by status: **active**, **resolved** or **all**. Each row in the table displays essential information such as the number, creation date, title, urgency level (for incidents), status, assigned consultant, and next planned action.

The table can be **sorted** and **filtered** by any column, using the options available in the context menu: alphabetical sort, or filtering by value.

VIEW AND EDIT DETAILS

You can access the full **details** of each request and **edit** them as long as they are not canceled or resolved. A **search bar** is also available to quickly find a request, except for filters by date or title.

CREATE A NEW REQUEST

Creating a new request is possible through a guided **form**, accessible via the **New Incident** or **New Service Request** button, directly from the incident and service request pages.

EXPORT LIST

Finally, you have the option to **export the complete list** of incidents or requests to an **Excel file**, to facilitate monitoring or sharing internally.

Good Practices

1 FORMULATE YOUR REQUEST

*Describe the problem precisely.
Indicate the steps you have already taken.
Add **screenshots** and avoid vague statements like "it doesn't work."*

2 RIGHT TYPE OF REQUEST

*Use "**Incident**" to report a malfunction or an error.
Use "**Service Request**" for a functional inquiry or an enhancement.*

3 DEADLINES AND PRIORITIES

*Indicate the true urgency of your request.
Be aware that timelines may vary based on complexity.*

4 INTERACT WITH THE BOT

*Ask clear and specific questions
Follow bot suggestions to create a request if needed*

5 USE OUR TOOLS

*Check the support page for FAQs
Download the request list for internal tracking*

6 COMMUNICATE EFFECTIVELY

*Respond promptly to support questions.
keep your request updated.*



Conclusion

OUR THANKS

The Client Success Portal was designed to offer you a smooth, centralized, and efficient experience in managing your requests. Thanks to its intuitive features, the integration of artificial intelligence, and user-centered navigation, it empowers you to gain autonomy while remaining supported by our team.

We hope this documentation has helped you better understand the tools available to you and how to use them fully to optimize your collaboration with Gestisoft.



We sincerely thank you for your trust in Gestisoft. Your success is at the heart of our priorities, and we are happy to support you at every step of your journey.



Please don't hesitate to share your comments or suggestions. Your feedback is valuable to help us continue improving our services and your experience on the portal.