



# Customer Portal: User Instructions

## Quick Reference Guide








### Log into the Customer Portal

If you do not already have a user profile, ask the portal service provider (or a portal administrator within your organization) to create your user profile. You will receive an auto generated email with your login information.

Follow these steps to log in:

1. Open a web browser.
2. Navigate to the web portal address provided in the email.
3. Enter your email address and password. (For new users, the email includes a temporary password.)
4. Click **Login**.
5. If logging in for the first time, enter and confirm a new password. Then click **Save New Password**.

### Request Service

1. Use one of these methods to view Request Service fields:
  - Home Page >  (Request service)
  - Home Page > Assets panel >  (Request Service) for a specific asset
  - Open Navigation > Service > Request Service tab
  - Open Navigation > Inventory >  (Request service)
2. Click  beside **Name** if you want to select a different contact. If **New contact** displays and you want to create a contact, select **New contact** to view additional fields.
3. Verify the contact information is correct.
4. Enter a **Brief description** of the issue.
5. Enter additional details in the **Detailed description of your issue** field.
6. Enter your **PO number** and **Priority** request (if available).
7. If available, enter a requested **Schedule** date/time or click  (Calendar) and  (Time picker) to select these values.
8. Enter your **Reference** number (up to 20 characters).
9. Click  beside **System** and **Item to service** to enter these values on the service order.
10. Click **Submit**. The new service order number displays.

### Portal Security

Portal security is based on **security roles**, such as supervisor or technician, and the **security permissions** granted to each role, such as the ability to request service or make payments. Users granted security permission to manage employees can edit other user profiles and assign security roles.

Permissions control your access to portal pages and functions.

### Change Your Password

1. Select Open Navigation > My Profile > Password.
2. Enter your current password.
3. Enter and confirm your new password.
1. Click **Reset Password**. This change takes effect the next time you log into the customer portal.

### Contact the Service Provider





Follow these steps to email your primary contact at the service provider's organization:

2. Select Open Navigation > Contact Us.
3. Verify or update the **Name**, **Email** and **Phone** values.
4. Enter your message in the **Comments** field.
4. Click **Send**.

### Update Your Portal Profile


1. Select Open Navigation > My Profile.
2. Update your contact information.
3. Click **Save**.

### Request a Quote

1. Use one of these methods to view Request Quote fields:
  - Home Page >  (Request quote)
  - Open Navigation > Quotes > Request Quote tab
2. Click  beside **Name** to select a different contact.
3. Verify your contact information is correct.
4. Enter a brief **Description** of the quote request.
5. In **Details**, enter the specific quote request, such as the intended quote outcome and requested items or services.
6. Enter the **Needed by** date/time or click  (Calendar) and  (Time picker) to select these values.
7. To submit up to three attachments, click **Browse**.
  - Navigate to the file location.
  - Click **Open** to select the document.
8. Click **Submit**.

### Update or Delete Asset Items

To view a list of assets, select Open Navigation > Inventory.

- Click **Edit** to display the item details.
- Click  (Calendar) to edit a purchase or warranty date.
- Click **Delete** to remove an asset from inventory.
- Click **Save** when finished editing an asset.

## Navigate the Home Page

The screenshot shows the Home Page interface with various panels. Annotations A through G point to specific elements:

- A**: Points to a Service Order (SO) number 10359 in the Service Orders panel.
- B**: Points to the minimize/maximize/close buttons in the top right of a panel.
- C**: Points to the 'Save Layout' button in the top right of the Account panel.
- D**: Points to the 'Request Service' button in the Assets panel.
- E**: Points to the 'Request Service' button in the Account panel.
- F**: Points to the 'Pay Invoice' button in the Invoices panel.
- G**: Points to the 'Active Items' bar chart in the Account Summary panel.

If you have security access to customize the Home Page, place the cursor in a panel title bar to display a multi-directional arrow . Then drag the panel to a new location and release the cursor.

### Navigating the Home Page

- A** Click a hyperlink to access the document.
- B** Minimize or close a panel. To restore a closed panel, click **Restore Default Layout**.
- C** Click a button to save your custom layout or return to the original layout.
- D** Request service for a specific asset.
- E** Click a button to request service or a quote.
- F** Click the button to pay invoices online, if the service provider offers this function.
- G** View the number of your open quotes, invoices, service orders, subcontractor SOs, and RMAs.

## View an Existing Service Order

Use one of these methods to view an existing service order:

- Home Page > Service Orders panel > Click SO number.
- Open Navigation > Service > Click SO number.
- Open Navigation > Invoices > Click SO number.

The screenshot shows the 'Service Order # 77801 Details' page. It has tabs for Overview, Details, Item(s) Serviced, Time Logs, Notes, Signature, and Documents. The 'Details' tab is active, showing a table of service order information.

Status	New
Brief Description	Printer malfunction
Requested By	Charles H. Summit
Contact	Jonas Brown
Contact Phone	(635) 555-0990 3718
Contact Email	<a href="mailto:jbrown@harding.com">jbrown@harding.com</a>
ProjectID	
Type	Portal
Priority	High
Reference	SDS-00056
Office Phone	
Mobile Phone	
Date Received	5/13/20
Date Opened	5/13/20
Date Closed	
Account Number	1051911
Invoice	
PO Number	

Account Name: Harding Electronics  
Address 1: 87531 Samson Circle  
Address 2: Suite 47  
City: Omaha  
State: NE  
Zip/Postal Code: 68128  
Country: U.S.A.  
Phone: (402) 556-5656  
URL: [Google Map](#)

[Close This Window](#)

### NOTES:

- Your service provider determines which tabs display.
- Service order information is uneditable. However, you can add notes and attachments from the Notes tab.
- If authorized to sign service orders, select Signature > [Click to Sign](#). Enter your signature. To clear the signature field, click (Refresh). Click **Save**.
- Click (Print) to print the document, including the signature (if signed).
- Click **Close this Window** to return to the previous page.

## Using the List Views


List views display multiple records of the same type in a grid format so you can quickly locate and review specific records. All list views allow you to enter filter criteria, export the list and print individual records. Some list views offer additional actions, such as approving a quote. Filters are automatically cleared when you move to a different page.

These functions are available from the list views:

- Export list view to a Word document, if Word is installed on your workstation.
- Export list view to Excel, if Excel is installed.
- Filters** Click **On** or **Off** to display or hide filters below the column headings.  
Enter or select criteria for one or more columns.  
The **Filters** setting affects ALL list views.
- Clear all filter fields.
- Select a filter condition, such as 'Contains' or 'Equal to'.
- Display a document in a PDF preview window.  
To print a document, right-click the page and select Print or hover the cursor over the document and click the print icon when the toolbar displays.
- Pay the invoice, if the Bill Pay function is available.
- Request service for the asset.
- Links** Click an underlined link to view the document.  
On the Projects page, click a contact name to send an email to the project contact.

## Maintain Your Company Information

If you have security access to manage your account, follow these steps to update your company information:

1. Select Open Navigation > My Company.
2. If your account is linked to related accounts, click  beside **Linked accounts** to select a different account.
3. Enter or update account information, such as the address.
4. Click **Save**.




## Dispute an Invoice

1. Display the Invoice Payment page.
2. Click the **Dispute** link for the invoice.
3. Enter the dispute reason.
4. Click **Submit**. The portal auto creates a service order.
5. Click **Back to Bill Pay List** to return to Invoice Payment.
6. You can pay all or part of a disputed invoice.

**NOTE: Scheduled payments for recurring agreements are auto processed regardless of whether you dispute a related invoice.**




## Maintain Employee Profiles

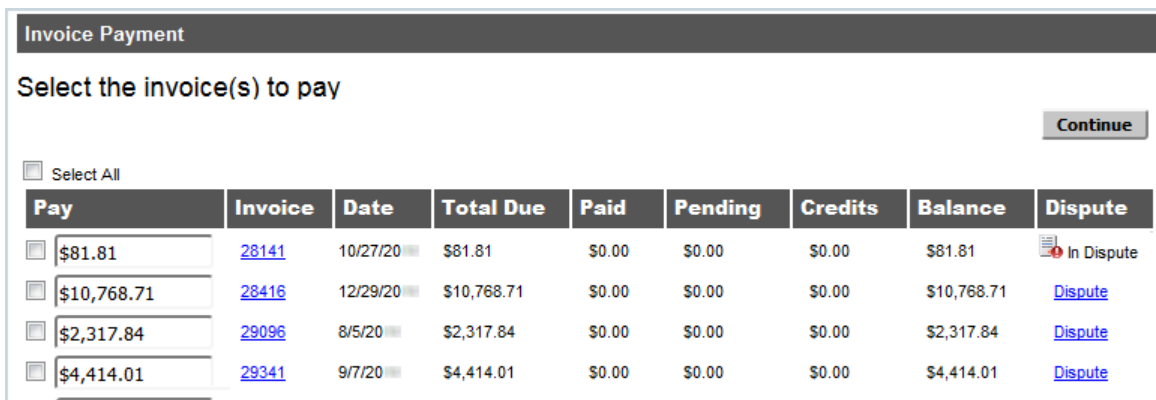
If you have security access to add or edit employees, follow these steps to manage employee access to the portal:

1. Select Open Navigation > My Company > Employees.
2. Click **Edit** to update an existing record.  
**OR**  
Click  (Add new employee) above the grid to create an employee record.
3. Enter or update the contact information. These fields are optional: **Inactive**, **Address 2** and **Extension**.  
  
In the **Role** field, click  to assign the appropriate security role. Roles determine which pages and functions display.
4. Select **Inactive** to prevent the rep from accessing the portal.
5. Click **Save**.
6. On the Employees tab, click  (Refresh) to update the list.


## Enter a Credit Card or ACH Payment


If the service provider accepts online payments and you have security access to the Bill Pay function, open the Invoice Payment page using one of these methods:

- Navigation menu > Bill Pay
- Navigation menu > Invoices >  (Pay)
- Home page >  (Bill pay) in the Account panel
- Home page >  (Make payments) in the Invoices panel



The screenshot shows the 'Invoice Payment' page with the heading 'Select the invoice(s) to pay'. There is a 'Continue' button in the top right. Below the heading is a 'Select All' checkbox. The main part of the page is a table with the following columns: Pay, Invoice, Date, Total Due, Paid, Pending, Credits, Balance, and Dispute. The table contains four rows of invoice data.

Pay	Invoice	Date	Total Due	Paid	Pending	Credits	Balance	Dispute
<input type="checkbox"/> \$81.81	<a href="#">28141</a>	10/27/20	\$81.81	\$0.00	\$0.00	\$0.00	\$81.81	 In Dispute
<input type="checkbox"/> \$10,768.71	<a href="#">28416</a>	12/29/20	\$10,768.71	\$0.00	\$0.00	\$0.00	\$10,768.71	<a href="#">Dispute</a>
<input type="checkbox"/> \$2,317.84	<a href="#">29096</a>	8/5/20	\$2,317.84	\$0.00	\$0.00	\$0.00	\$2,317.84	<a href="#">Dispute</a>
<input type="checkbox"/> \$4,414.01	<a href="#">29341</a>	9/7/20	\$4,414.01	\$0.00	\$0.00	\$0.00	\$4,414.01	<a href="#">Dispute</a>


1. Select the checkbox beside each invoice to pay or check **Select all** to pay all invoices in the list.
2. Edit the **Pay** field to enter an amount different than the **Total due**.  
**NOTE: You can pay all or part of a disputed invoice. Refer to "Dispute an Invoice" for instructions to notify the service provider that you are disputing an invoice.**
3. Click **Continue**.
4. Review the selected invoices and payments. Click **Edit Invoice Selections** if you want to return to the invoice list.
5. Click  to select one of your predefined payment methods. (See "Manage Your Payment Methods" to add a method.)
6. Click **Pay with Selected Method**. The payment processes immediately.
7. Click **Print a Receipt** to generate a receipt for the payment.
8. Click **Back to Bill Pay List** to pay additional invoices.

## Manage Your Payment Methods

If the service provider accepts credit card or electronic payments and you have security access to manage your account, follow these steps to maintain payment methods:

1. Select Open Navigation > My Company > Payment Methods  
**OR** Click **Add/Edit Payment Method** when entering a payment.

The screenshot shows a web interface for managing payment methods. At the top, there are tabs for 'Account', 'Employees', and 'Payment Methods'. Below the tabs is a header 'My Company'. The main heading is 'Select a payment method to edit or enter a new payment type'. Under this, there is a section 'Payment Methods on File' with a dropdown menu currently set to '-New payment method -'. Below this is the 'Payment Type' section with radio buttons for 'Bank' and 'Credit Card', where 'Credit Card' is selected. There is a 'Set as default' checkbox labeled 'Yes' which is unchecked. A 'Nickname' text input field is present. The 'Card Type' section has radio buttons for 'Visa', 'MasterCard', 'American Express', and 'Discover'. Below these is a section titled 'BNG Secure Payment Entry' which contains three input fields: 'Credit Card Number', 'Expiration Date' (with a 'MMYY' placeholder), and 'CVV'. A 'Save Card' button is located below these fields. At the bottom of the form is an 'Add Payment Method' button. Above this button are several input fields for account information: 'Account Holder', 'Address 1', 'Address 2', 'City', 'State' (a dropdown menu with '-Select One-' selected), 'Country' (a dropdown menu with 'USA' selected), 'Postal Code', and 'Phone Number'.

2. If entering a new payment method, keep **Payment methods on file** set to "New payment method".  
To edit an existing payment method, click  beside **Payment methods on file** and select the method.
3. Select the appropriate **Payment type**.
4. Select **Yes** if you want this payment method to default during bill pay.
5. Enter a **Nickname** to easily identify the record, such as the payment type and last four digits (e.g. "VISA-4486").
6. The third-party payment processor and the selected **Payment type** determine the additional fields displayed:
  - **Credit cards.** Enter the **Card number**, **Expiration date** (and for BNG, **CVV code**, if available).
  - **Bank accounts.** Enter the **Bank name**, bank **Routing number** and **Account number**. Select the **Account type**.Click **Save Card** or **Save Account**.

**NOTE:** This step sends the payment method to the processor's portal but it does NOT save your payment method on this portal. **To save the payment method, you must also click the button at the bottom of the page.**

7. Enter the exact **Account holder** name as it appears on the card or account.
8. Enter the address listed on the card or bank account, which may be different from your business address.
9. Click **Add New Payment** to save a new record or click **Edit Payment** to save changes to an existing record.