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

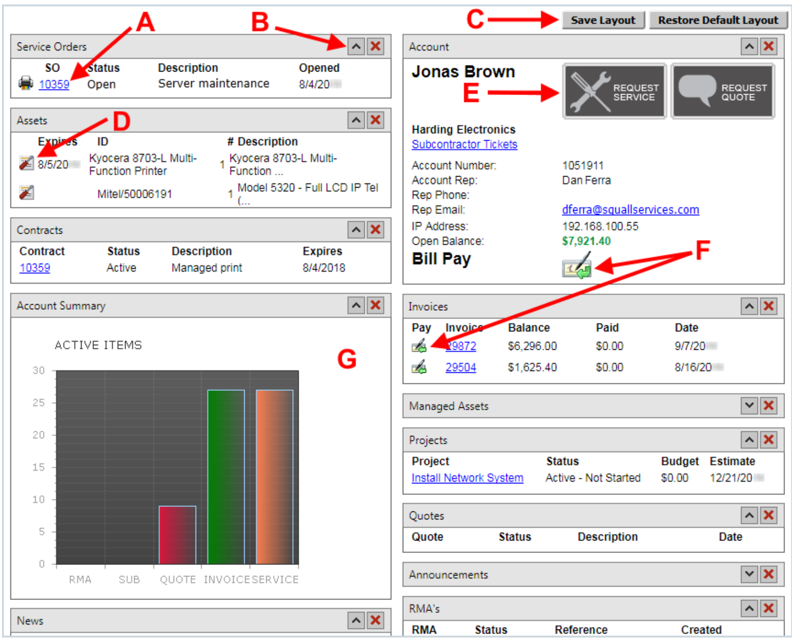
1. Use one of these methods to view Request Quote fields:
   - Home Page > (Request quote)
   - Open Navigation > Quotes > Request Quote tab
2. Click beside **Name** to select a different contact.
3. Verify your contact information is correct.
4. Enter a brief **Description** of the quote request.
5. 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



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.

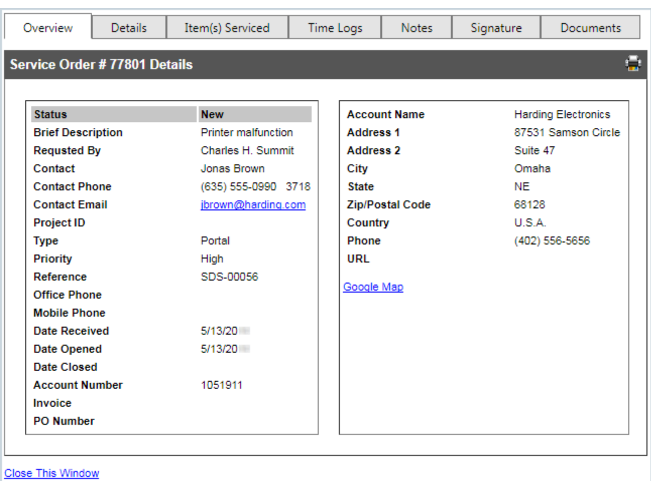
Navigating the Home Page

- **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.



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

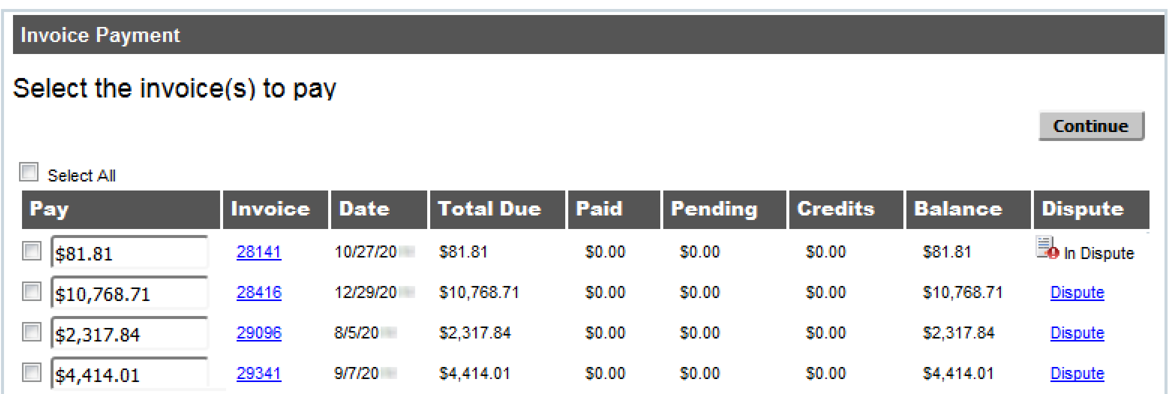
If you have security access to add or edit employees, follow these steps to manage employee access to the portal:

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



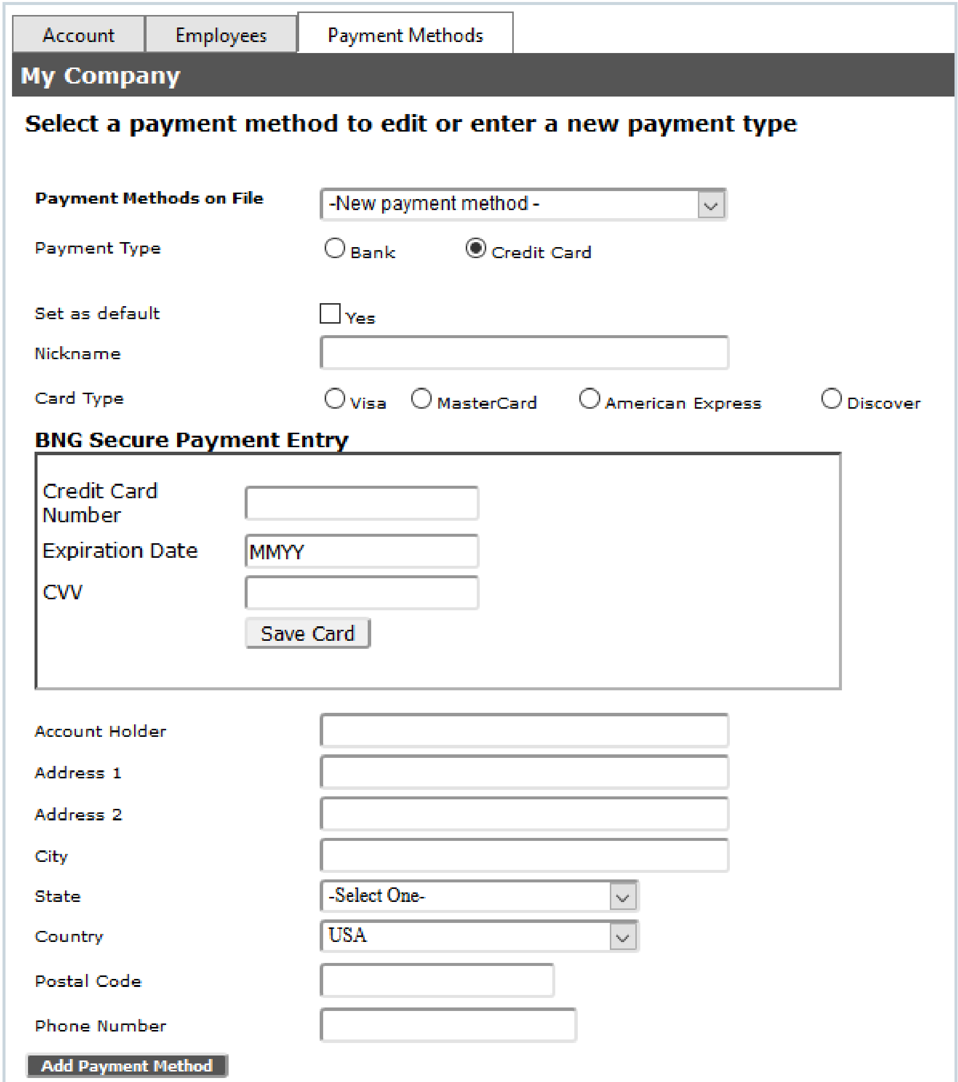
Pay	Invoice	Date	Total Due	Paid	Pending	Credits	Balance	Dispute
$81.81	28141	10/27/20	$81.81	$0.00	$0.00	$0.00	$81.81	In Dispute
$10,768.71	28416	12/29/20	$10,768.71	$0.00	$0.00	$0.00	$10,768.71	Dispute
$2,317.84	29096	8/5/20	$2,317.84	$0.00	$0.00	$0.00	$2,317.84	Dispute
$4,414.01	29341	9/7/20	$4,414.01	$0.00	$0.00	$0.00	$4,414.01	Dispute

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.



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.