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Field Service Management Software

# New – Customer Portal

## How to switch the Portal on for selected Customers

You are completely in control of which of your Customers you give access to the Portal. It may be that it's not relevant for some but crucial for others.

So, for this reason access is granted on a customer-by-customer basis by going in your Work Group to the left-hand Customers menu ;

1. Locate the required customer from your list.
2. Click on the pencil icon on the far right to edit the Customer record.
3. On the tabs at the top running left to right, click on **Customer Portal**.
4. Move the orange slider next to 'Use Customer Portal' to the on position.
5. The Portal will now be active for that Customer. Repeat the same steps for all other required Customers.

## Adding access to the Customer Portal for named users

Once you have enabled Portal access using the steps above;

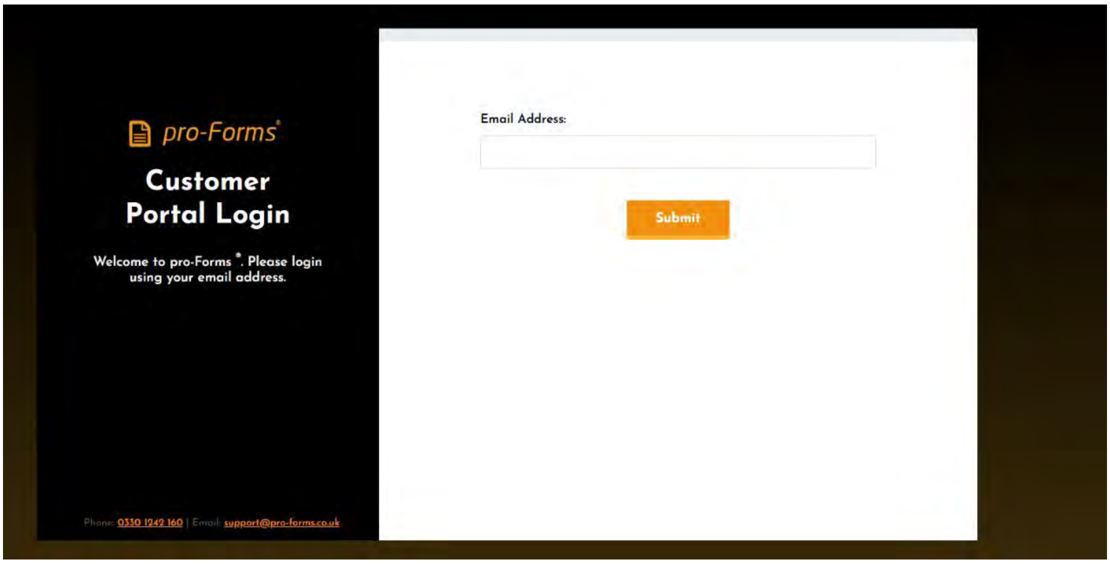
1. Click the +Add User button top right of the screen.
2. Complete the name and email address of the new user and click + Add.
3. This will send an email to the person at that email address containing a link to the Portal login.
4. After adding the first names person you can click the pencil icon to edit the account and if you need to :
    a. change their name,
    b. email address,
    c. set the default page displayed to them when they log in to the Portal,
    d. set them to be an Admin of their Portal (only the Portal for that Customer)
5. Only you and a Portal user set to be an Admin for that Customer can then add other users to that Portal.
6. Clicking the cross against a Portal user account will archive that user and remove their access to the Portal.

## Logging in to the Portal

When a user wants to log in to their Portal, they simply click the link initially sent to them by email when their account was set up.

They should store the link in their browser bookmarks or as a shortcut link on their desktop.

After clicking the link, they will see this screen:




They need to enter the same email address used when their account was set up (and where the link was sent to) and click the 'Submit' button.

An email will be sent to them containing a time limited numeric code. They should enter this code on screen and after doing so they will have access into their Portal.

For security reasons they will be sent a new code each time they try to log in.

## What can they do after logging in?

Depending on the default screen set for them, this is what will be initially displayed after the log in.

The left-hand menu contains options for;

- Dashboard
- Jobs
- Quotes
- Assets
- COSHH
- Users
- Service Provider

### Dashboard

Shows a graphical display of the key numbers relating the Jobs, Quotes and Assets for the work they undertake with you.

### Jobs

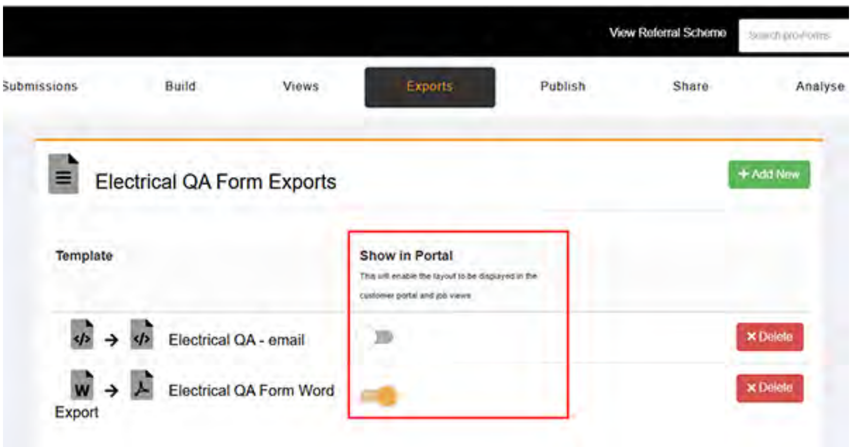
Will display a recent list of the jobs raised by you for work you have done for that Customer (and only for that Customer and no other Customer).

Clicking any job in the list will open a screen with further details of the job including :

- Job status (Started, Completed etc)
- Job Number (for reference in the case of queries)
- The operative allocated
- Job notes
- The opportunity to cancel/ rearrange the visit.
- An option to add any access notes for the job e.g. '*report to gatehouse 1*'
- For jobs with a Completed status the forms completed by your operative on site will be available for download.

You will also be able to widen the search date for displaying older jobs if the jobs in the initial table are too recent.

For a Portal user to be able to see and download a form completed against a job you have done, the 'Show in Portal' option must be set to 'On' against the form Exports – see below:




From the top right-hand corner, they will also be able to click the + Request a Job button and complete a form to notify you of a new piece of work/ visit they would like you to carry out. You will be notified of this by email – please go to the Customers – Settings – Customer Notifications to set who will be notified of new Job, sites and asset requests.

### Quotes

As with Jobs, a list of recent quotes sent to the Customer will be displayed along with their status e.g. accepted, rejected, expired etc.

Older quotes can be displayed using the search criteria.

The + Request a Quote button in the top right of the screen will allow your Customer to request a new quote for further work – you will be notified of this.

### Assets

The default screen displays a list of assets with then options to search all assets for that Customer by code, name, serial number or type.

A search can be further narrowed by using the Sites dropdown to only display assets located at the site selected in the dropdown.

The + Request Creation of an Asset button top right will let the customer inform you of a new asset they wish to be added against their company for future work you may be asked to perform.

### COSHH

This option displays all COSHH assessments you have carried out for the Customer along with search criteria to help narrow the search down and speed up locating what they are looking for.

### Service Provider

This option displays your Company contact details along with any document you have upload to be visible to them and for them to download. This may include commonly requested documents such as insurance certificates and accreditation certificates.

The contact details displayed are taken from those entered into the Admin, Organisation - Settings section of your Work Group. Either set up an organisation for your business or edit the one that exists.

The documents you wish to make visible in the Portal can also be uploaded from here.

## How to log out of the Portal

When finished with their current session, Portal users can safely log out by clicking on the icon in the top right corner of the screen and clicking on Log-out.

## Any questions?

Please contact us at :

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