Last Updated: June 20 2022

Customer Portal: Guide for Customers

Why use the customer portal?

Our customer portal, run through our job management software simPRO, lets you easily and securely view your quotes, jobs, invoices and account statement; view and edit your details; and view and edit your site and contact details.

If you are unable to find any of the pages mentioned below, this means that you have not been enabled to view them.

Set up username and password

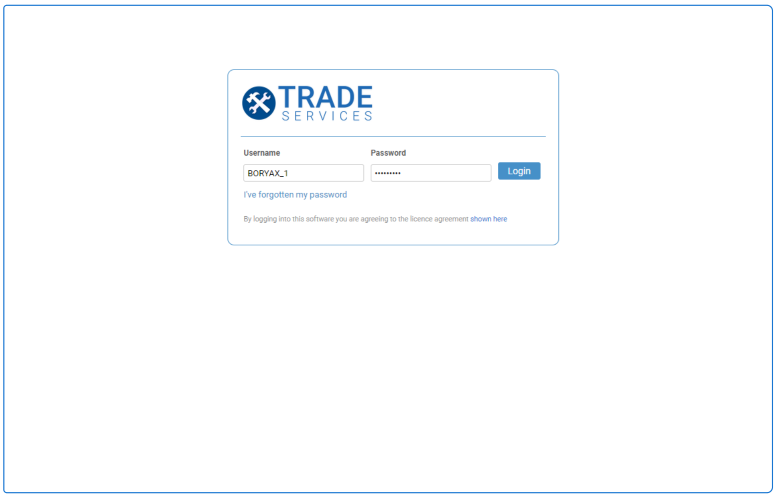
You will receive an email from simPRO with instructions to set up your login details for the Customer Portal.

1. Access the **Login Details** email.
2. Click the link included in the body of the email.
3. Confirm or enter a **Username**. By default the username is set to your email address.
4. Enter a **Password**.
    - The password must contain at least 1 number, 1 upper case and 1 lower case letter.
5. Confirm your **Password**.

Once you have set up your account, you can log in to the online customer portal and view your invoices, statements and quotes.

Log in to the portal

To log in, you need your login details, including a URL, username and password. If you did not receive an email to set up your login details, contact your simPRO administrator.

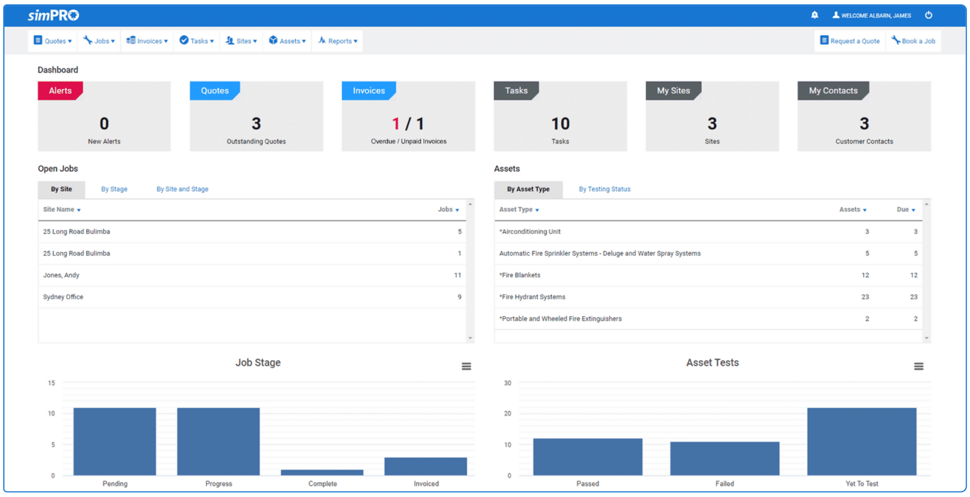


To log into the customer portal:

1. Click the customer portal URL from the email. A page similar to the screenshot above loads.
2. Enter your login details.
    - If you did not receive an email to set up your login details, contact your simPRO administrator.
    - Click **I've forgotten my password** to reset your password.
3. Click **Login**.

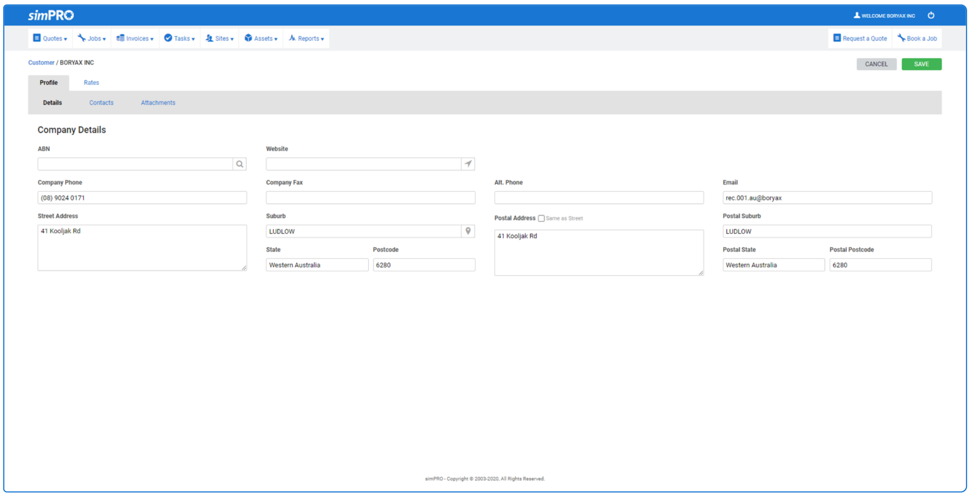
After you have logged in, you are taken to the main screen of the portal, the dashboard. Your name appears in the top right corner, next to the **logout** icon. The main menu options display across the top of the screen.

You can view and edit your preferences, including your details, contacts, and any relevant attachments.



Manage preferences

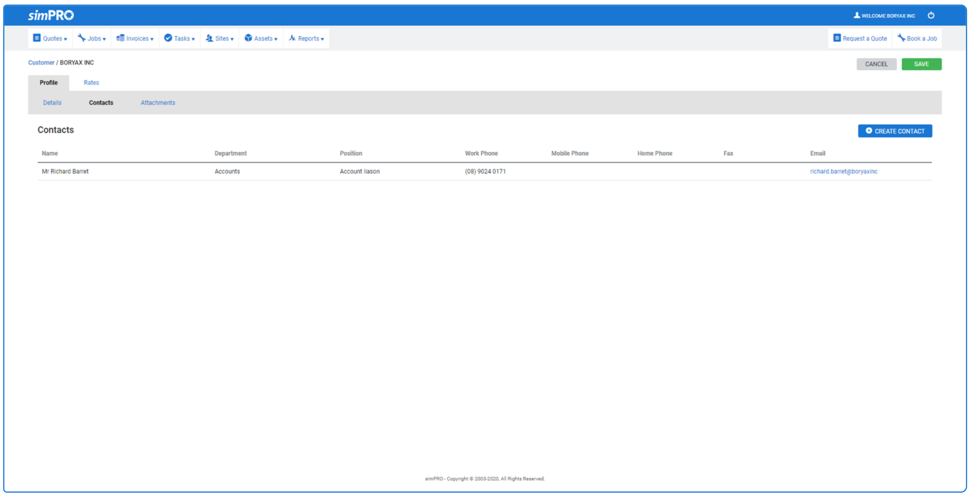
View and edit details



To view and edit your details:

1. Hover over your name in the top right corner.
2. Click **Preferences**.
3. Under **Profile > Details**, view and edit details as required.
4. Click **Save**.

View and edit contacts



To view and edit your existing contacts:

1. Hover over your name in the top right corner.
2. Click **Preferences**.
3. Under **Profile**, click the **Contacts** sub-tab.
4. Click the name of the contact.
5. Make changes as required.
    - To send a password reset email to a contact with login access, click **Options** next to the username and click **Reset Password**.
6. Click **Update**.
7. Click **Save**.

To create a new contact:

1. Hover over your name in the top right corner.
2. Click **Preferences**.
3. Under **Profile**, click the **Contacts** sub-tab.
4. Click **Create Contact**.
5. Enter a **First Name** and other required details.
6. Select whether you want this person to be the contact for a **Quote**, **Job**, **Invoice** or **Statement & Overdue Letter**, and whether they are the **Primary Contact**.
7. Under **Login Active**, select **Yes** to give this contact their own customer portal login details.
    - To provide login privileges to any contact, the email address is mandatory.
8. Click **Save**.
    - This sends a setup email automatically to the contact's email address allowing them to create their username and password.

Contacts created in the portal are sent through to simPRO.

Managing contact's password from the customer portal

1. Hover over the customer's name in the top right corner and click **Preferences**.
2. Click **Contacts** and click the required existing contact.
3. Under **Credentials**, click **Options** > **Reset Password**. The customer contact is then sent instructions for resetting their password.

Note that customers can view their contacts' usernames but cannot edit them.

Create login details for another employee

You can create additional login details for your customer portal when editing or creating a contact.

To create login details for another employee:

1. Hover over your name in the top right corner and click **Preferences**.
2. Under **Profile**, click the **Contacts** sub-tab.

3. Open the contact you wish to create login details for, or create a new contact.
4. Under **Login Active**, select **Yes**.
    - If you are providing a login, the email address is mandatory.
5. Click **Send Setup Email**.
6. Under **Page Access**, select the pages you wish the employee to have access to through the portal.
7. Under **Site Access**, click an available site to move it to the **Assigned Sites** field.
    - The employee is able to access quotes, jobs, invoices and assets for **Assigned Sites** only.
8. Click **Create** or **Update** below the contact.
9. Click **Save**.
10. Click **Save and Finish**.

The employee can then log in to the customer portal, using the original URL you received along with their login details. You can repeat this process for as many employees as necessary.

View attachments

You can view any relevant attachments, such as contracts.

To view attachments:

1. Hover over your name in the top right corner.
2. Click **Preferences**.
3. Under **Profile**, click the **Attachments** sub-tab.
4. Click an attachment to open it. To find a specific quote, enter the attachment name in the search bar and click **Search**.

View quotes

View the status and details of your quotes through the portal.

To view quotes:

1. Hover over **Quotes** at the top of the page.
2. Click **Outstanding** or **Actioned**, depending on the quotes you wish to view.
3. View quote details as required. To find a specific quote, enter a quote number in the search bar and click **Search**.

To switch between **Outstanding** and **Actioned** quotes, click the appropriate sub-tab.

To print a quote, click **Options > Print Quote**.

To view or upload attachments, click **Options > Attachments**.

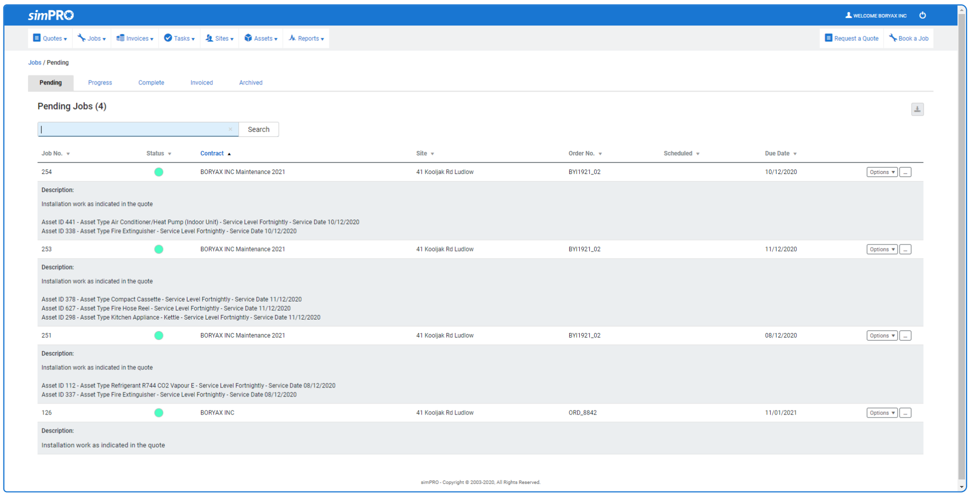
To download a spreadsheet of quote details, click the icon in the top right corner, then click **CSV**.

View jobs

View the status and details of your jobs through the portal.

To view jobs:

1. Hover over **Jobs** at the top of the page.
2. Click the stage you need to view, such as **Pending** or **Complete**.
3. View job details as required. To find a specific job, enter a job number in the search bar and click **Search**.



To switch between **Pending**, **Progress**, **Complete**, **Invoiced** and **Archive** jobs, click the appropriate sub-tab.

To print a job, click **Options > Print Job**.

To view or upload attachments, click **Options > Attachments**.

To view associated invoices, click the **...** button to the right of **Options** for details.

To download a spreadsheet of job details, click the icon in the top right corner, then click **CSV**.

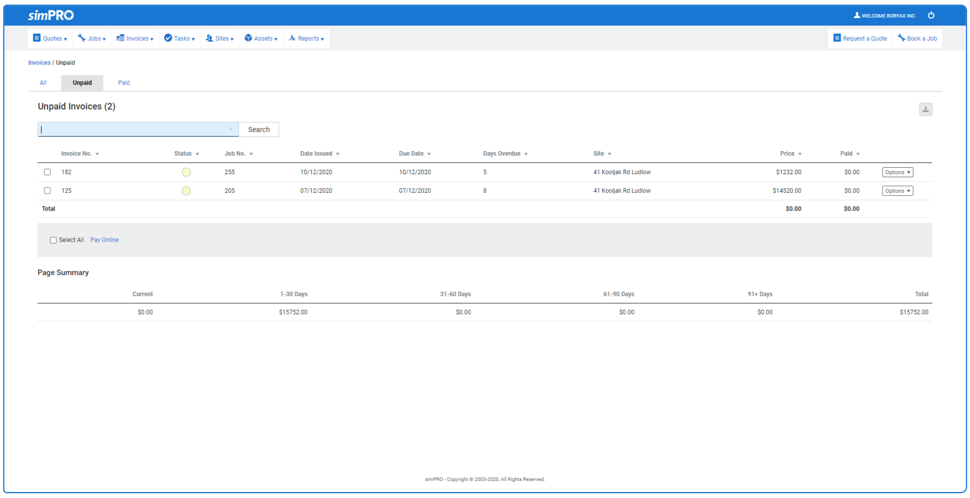
View and pay invoices

View invoices through the portal and pay them using a credit card.

View invoices

To view invoices:

1. Hover over **Invoices** at the top of the page.
2. Click **Unpaid** or **Paid**, depending on the invoices you wish to view.
3. View invoice details as required. To find a specific invoice, enter an invoice or job number in the search bar and click **Search**.



To switch between **All**, **Unpaid** and **Paid** invoices, click the appropriate sub-tab.

To print an invoice, click **Options > Print Invoice**.

To download a spreadsheet of invoice details, click the icon in the top right corner, then click **CSV**.

The **Page Summary** displays a summary of balance outstanding.

Pay invoices

To pay invoices:

1. Hover over **Invoices** at the top of the page.
2. Click **Unpaid**.
3. Locate the invoice in the list.
4. Click **Options > Pay Online**, or select multiple invoices and click **Pay Online** at the bottom of the screen.
5. In the **Payments** pop-up window, enter your credit card details, including **Name on Card**, **Expiry**, **Card Number** and **CVV**.
6. Click **Pay**.
7. Click **Continue** to confirm the payment.
8. If the payment is successful, a confirmation appears, along with a receipt number you may wish to record. Click **Close**.

Alternatively, you can also pay invoices through the **Statements** page.

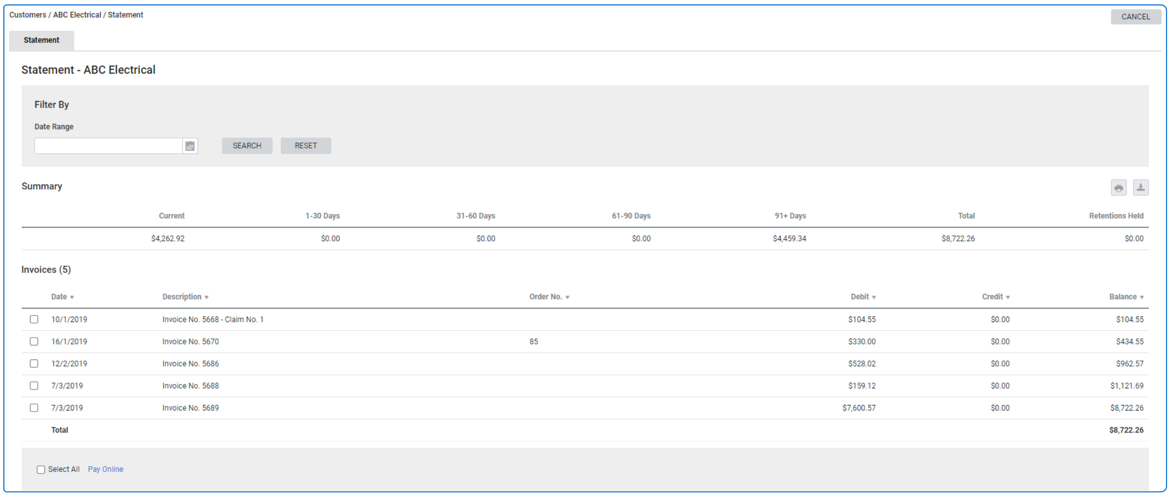
To pay invoices through the **Statements** page:

1. Hover over **Invoices** at the top of the page.
2. Click **Statement**.
3. Under **Invoices**, select the invoice or click **Select All**.
4. Click **Pay Online**.
5. In the **Payments** pop-up window, enter your credit card details, including **Name on Card**, **Expiry**, **Card Number** and **CVV**.
6. Click **Pay**.
7. Click **Continue** to confirm the payment.
8. If the payment is successful, a confirmation appears, along with a receipt number you may wish to record. Click **Close**.

View account statement

To view your account statement:

1. Hover over **Invoices** at the top of the page.
2. Click **Statement**.
3. View statement details as required.



To narrow results to a specific timeframe, use the **Date Range** date picker and click **Search**.

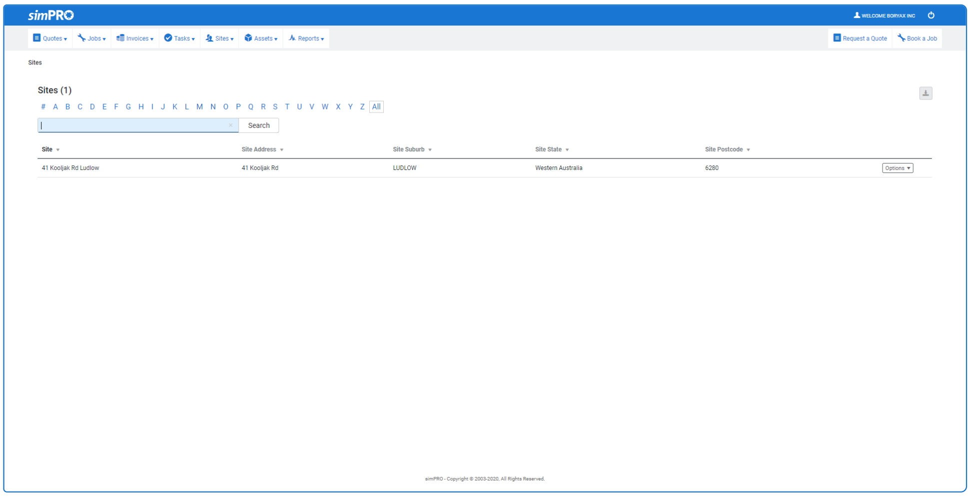
To print your statement, click **Print Statement** at the bottom of the page.

To download a spreadsheet of statement details, click the icon in the top right corner, then click **CSV**.

View, edit, and create sites

You can view and edit the details of your sites, and create new sites.

View and edit sites



To view and edit sites:

1. Hover over **Sites** at the top of the page.
2. Click **Sites**.
3. Click the site. To find a specific site, enter a site name in the search bar and click **Search**.
4. Edit the **Site Details** as required and click **Save**.
5. View and edit contacts and view attachments as required through the **Contacts** and **Attachments** tabs.
6. Click **Save and Finish**.

To download a spreadsheet of site details, click the icon in the top right corner, then click **CSV**.

Create a new site

New sites created in the portal are sent to simPRO. To create a new site:

1. Hover over **Sites** at the top of the page.
2. Click **Create New Site**.

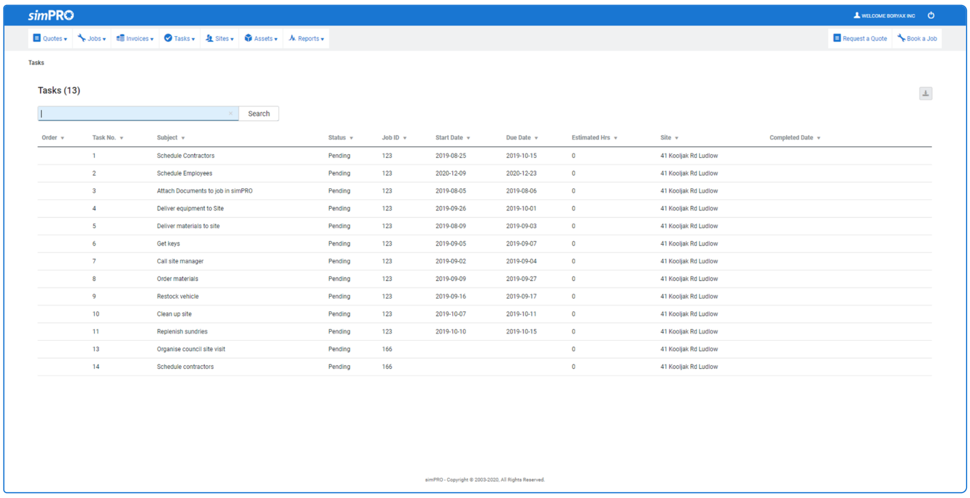
3. Enter **New Site Details** as required and click **Save**.
4. If you wish to add site contacts, click the **Contacts** tab and click **Create Contact**. When you have finished creating the contact, click **Save**.
5. Click **Save and Finish**.

View tasks

You can use the customer portal to view the details and status of tasks created as part of the work we are doing with you.

To view tasks:

1. Go to **Tasks** at the top of the page.
2. Click **View Tasks**.
3. View task details as required.



To download a spreadsheet of task details, click the icon in the top right corner, then click **CSV**.

Request quotes and check quote status

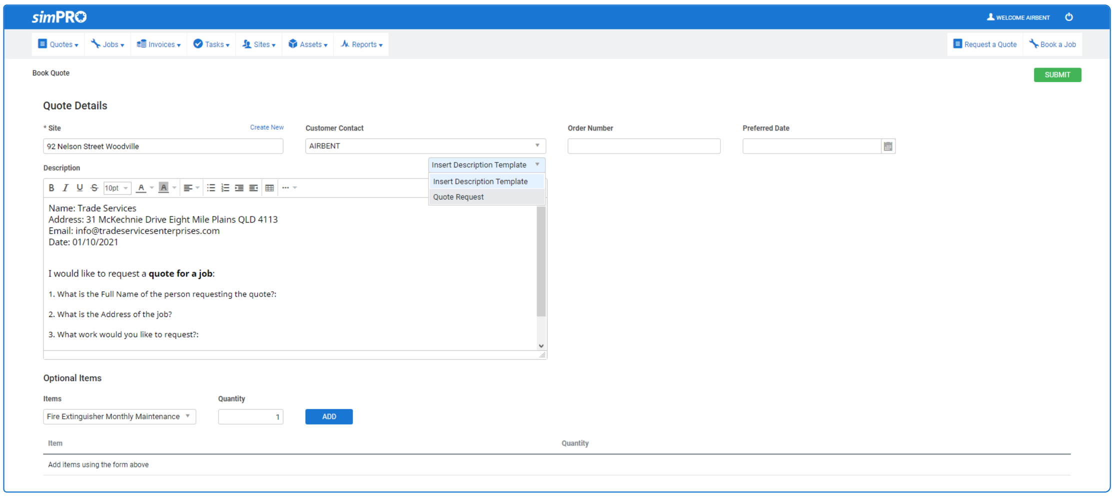
You can easily request a quote through your customer portal, sending information directly to our system for us to review and action. You can then check the quote's status whenever you wish.

Request a quote

To request a quote through the customer portal:

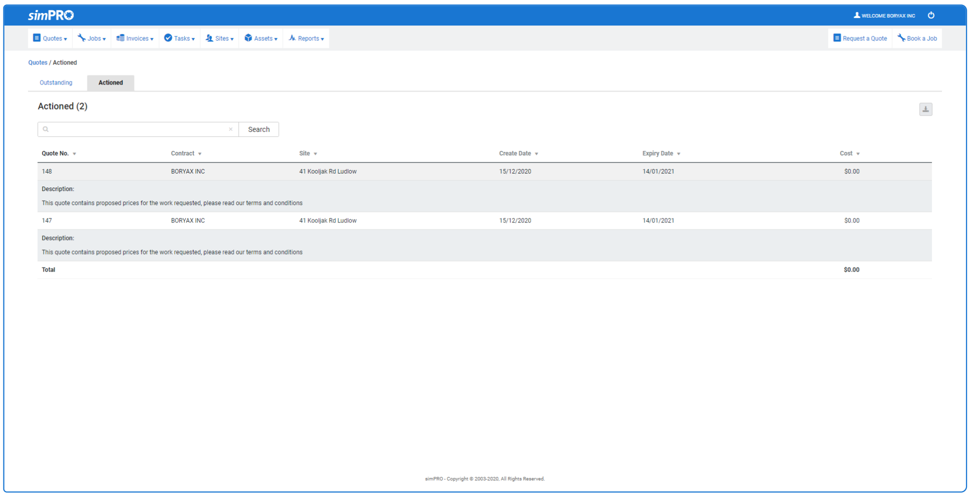
1. Click **Request a Quote** at the top right corner of the screen.
2. Select a **Site** for the quote, or click **Create New** to create a new site, then return to this screen.
3. Select a **Customer Contact**.
4. If required, enter an **Order Number** and select a **Preferred Date** using the date picker.
5. In the **Description** field, enter as much detail as you can about the work you would like us to provide a quote for.
    - You can also select a pre-written script from **Insert Script**.
6. If the **Assets** section appears below the **Description**, click the search bar to view and search assets requiring maintenance, and click **Add**.
    - You can search the asset using the asset ID, location, name, and other details specific to that asset.
7. If the **Optional Items** field appears at the bottom of the screen, select an item from the **Items** drop-down list, adjust the **Quantity** and click **Add** as required.
    - This item depends on your reason for booking the quote, for example, a six month service of an asset or an inspection and maintenance of a fire extinguisher, and has an associated cost.
    - Alternatively, you can leave this area blank.
8. Under **Attachments**, drag and drop attachments or click to upload attachments, such as a photo of the work you have quoted, as required.
9. When finished, click **Submit**.

Your quote appears in our system for review.



Check quote status

After you have requested a quote, go to **Quotes > Outstanding** to view it. Once we have reviewed and actioned the quote, it appears under **Quotes > Actioned** instead, with the estimated **Cost** included.



Once a quote has been approved, you can add attachments if required by clicking **Options > Attachments**.

Book a job and check job status

You can easily book a job through your customer portal, sending information directly to our system for us to review and schedule. You can then check the job's status whenever you wish.

Book a job

To book a job through the customer portal:

1. Click **Book a Job** at the top right corner of the screen.
2. Select a **Site** for the job, or click **Create New** to create a new site, then return to this screen.
3. Select a **Customer Contact**.
4. If required, enter an **Order Number** and select a **Preferred Date** using the date picker.
5. In the **Description** field, enter as much detail as you can about the job.
   - You can also select a pre-written script from **Insert Script**.
6. If the **Assets** section appears below the **Description**, click into the search bar to view and search assets requiring maintenance, and click **Add**.
   - You can search the asset using the asset ID, location, name, and other details specific to that asset.

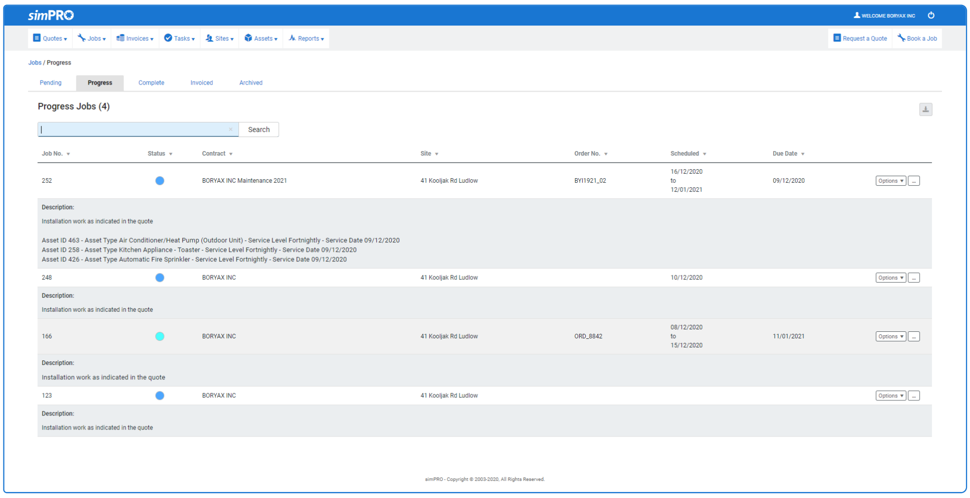
7. If the **Optional Items** field appears at the bottom of the screen, select an item from the **Items** drop-down list, adjust **Quantity** and click **Add** as required.
   - This item depends on your reason for booking the quote, for example, a six month service of an asset or an inspection and maintenance of a fire extinguisher, and has an associated cost.
8. Under **Attachments**, drag and drop attachments or click to upload attachments, such as a photo of the job site, as required.
9. When finished, click **Submit**.

Your job appears in our system for review and scheduling.

Add attachments to an existing job by clicking **Options > Attachments** on the job.

Check job status

After you have booked a job, go to **Jobs** **> Pending** to view it. Once we have scheduled the job, it appears under **Jobs** **> Progress Jobs** instead, and is displayed the **Scheduled** date. If you hover over its **Status**, you see it has changed from 'Job : New Service' to 'Job : In Progress'. After the job is complete it appears under **Jobs** **> Complete**. After it has been invoiced it appears under **Jobs** **> Invoiced**, and after the invoice is paid it is listed under **Jobs** **> Archive**.



View assets

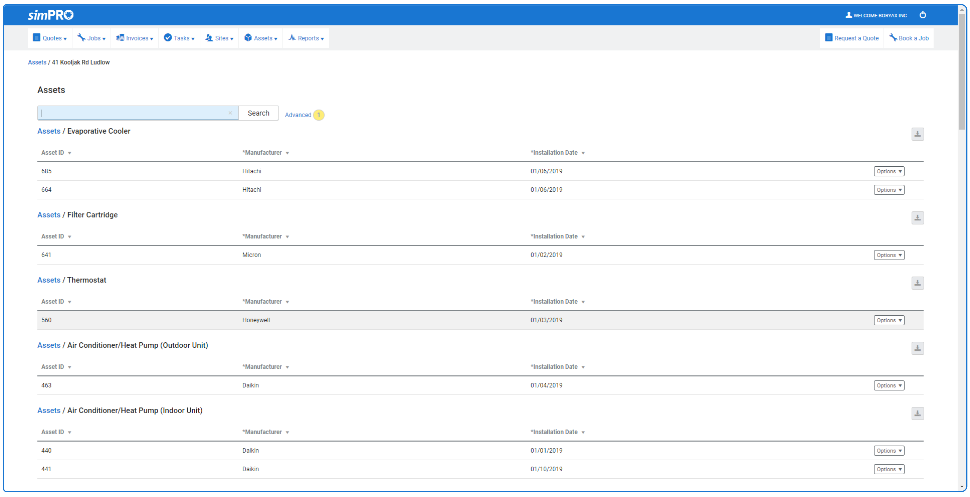
View detailed information about your assets, including service and transfer history, and request a quote or book a job directly from an asset requiring maintenance to automatically assign it to the quote / job.

Assets are grouped by site and asset type.

To view assets and their service and transfer history:

1. Hover over **Assets** at the top of the page.
2. Click **View Assets**.
3. Click the **Site** you wish to view assets for.
4. Assets are grouped by type. Scroll to find the asset, or enter an asset number into the **search bar** and click **Search**.
5. Click the asset. It opens in a pop-up window.
6. View the **Service History** details as required.
7. Click the **Transfer History** tab to view transfer information as required.
8. When you have finished, close the window by clicking the X in the top right corner.

To download a list of asset details, click the icon in the top right and click CSV.



To request a quote or book a job directly from an asset:

1. Hover over **Assets** at the top of the page.
2. Click **View Assets**.
3. Click the **Site** you wish to view assets for.
4. Assets are grouped by type. Scroll to find the asset, or enter an asset number into the **search bar** and click **Search**.
5. Click **Options > Request a Quote / Book a Job** on the asset.
6. Request a quote or Book a job as normal.

View reports

Find out more detailed information about your assets by viewing reports. Reports include the **Programmed Preventative Maintenance Report**, the **Defect Report**, and the **Test History Report**.

To view reports:

1. Hover over **Reports** at the top of the page.
2. Click the report you wish to view.
3. Filter results by selecting options from the drop-down lists.
4. Click **Search**.
5. View report results as required.

To download report details, click the  icon in the top right corner of the report.

Programmed Preventative Maintenance Report

This report displays an overview of service results per service level and asset types.

1. Select a **Year**.
2. Search and select a **Site**.
3. Click **Search**.

Use the key above the report results to find which assets have failed, passed, or are yet to be tested.

The report divides the results based on weeks and each week runs from Monday to Sunday. Note the following to understand the report:

- Past results include all results tested prior to the current week. Future results include all results from the start of the current week. The current week is indicated by a red line.
- The **Contract Expiry Date** filter applies whether or not a contract is selected. If a contract is not selected, all assets are displayed and only those associated with contracts are displayed based on the filter option selected.
- Week 1 is the first complete week of January starting from Monday and ending on Sunday.
- Week 53 starts on the final Monday of December and includes the first days of the following year up to Sunday.

Click a cell with results to view:

- The start and end date of the week
- The asset type
- If the cell is for a future result, it displays the number of assets to be tested.
- If the cell is for a past result, it displays the number of assets not tested, failed and passed and the associated job number.

Past records

Past records show the quantity of assets that were tested that week. This is based on the date on the job card in which the assets were tested.

- If all asset tests due in that week have passed, the value shows the number of assets passed and the cell is green.
- If not all assets were tested but there were no failures, the number of assets not tested is displayed, and the cell is yellow.
- If there was at least one recorded failure, the number of failures is displayed and the cell is coloured red.
- If there was at least one recorded failure, but there were also some untested assets, the cell is red with a yellow bubble that displays the quantity of untested assets.

Future records

Future weeks show the number of assets due to be tested. This is based on the **Service** date, or if the asset is already added to a job, the due date on the job.

All future records are displayed blue.

Weeks that have a relatively higher number of assets due to be tested are displayed in a darker blue.

Current Defects Report

This report displays all assets that have failed a test and have not yet been rectified.

1. Search and select a **Site**.
2. Select a specific **Asset Type** to include in the report, or select **All** types.
3. Click **Search**.

The **Date Checked** column is the date when the technician failed the asset.

Test History Report

1. Search and select a **Site**.
2. Select a specific **Asset Type** to include in the report, or select **All** types.
3. Select a **Date** range to include assets tested in that range.
4. Select to filter by **Status**.
5. Click **Search**.