



# Customer Portal

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*Powered by*

**msi** |  **SERVICE PRO**

User Guide

# Welcome to the BTU Customer Portal!

## ☰ This Guide to BTU's Customer portal will explain the following:

- ➔ How to register a Customer Portal account and log in to the portal
- ➔ How to find a specific work order
- ➔ How to review information for a work order, including these items:
  - Order summary
  - Inspections
- ➔ How to submit a request for service through the portal

For any issues or questions regarding the Customer Portal please contact BTU directly by phone or email:

- ➔ ***Alex.Prince@btu-maintenance.com***
- ➔ ***01483 590619***



## ≡ BROWSER REQUIREMENTS

Customer Portal is fully tested by MSI Data for compatibility with Google Chrome. Chrome is the recommended browser for using Customer Portal.

Using another browser may cause the following error:

### "Unable to Configure Verification Page"

If you get this error while using Chrome please try the below solution:

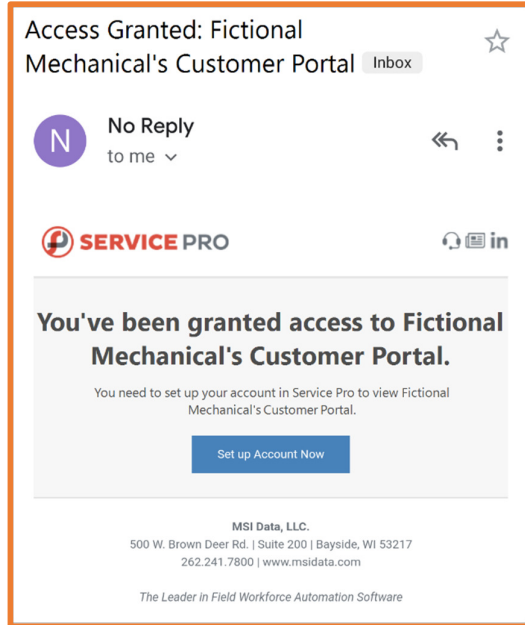
In **Chrome Settings > Privacy and Security > Cookies and other site data**, select one of these options:

- ➔ Allow all cookies
- ➔ Block third-party cookies in Incognito



## ≡ REGISTER AN ACCOUNT

When a BTU invites you to use their Customer Portal, you will receive a welcome email.

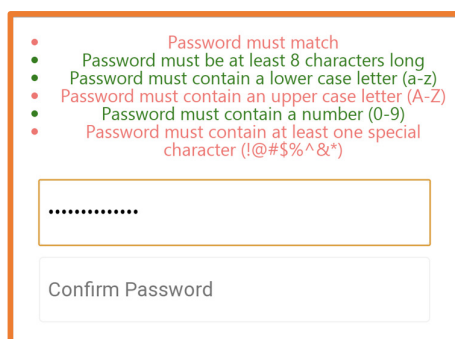


Click **Set up Account Now** to open your web browser to a page where you can set up your user account.

If you cannot see this button then just click in the space where it should be and you should still be taken to the portal web page.

You will log in to the Customer Portal using the email address where you received the welcome email and a password that you create on this page.

A list of password requirements appears. This list is dynamic based on the characters you type.



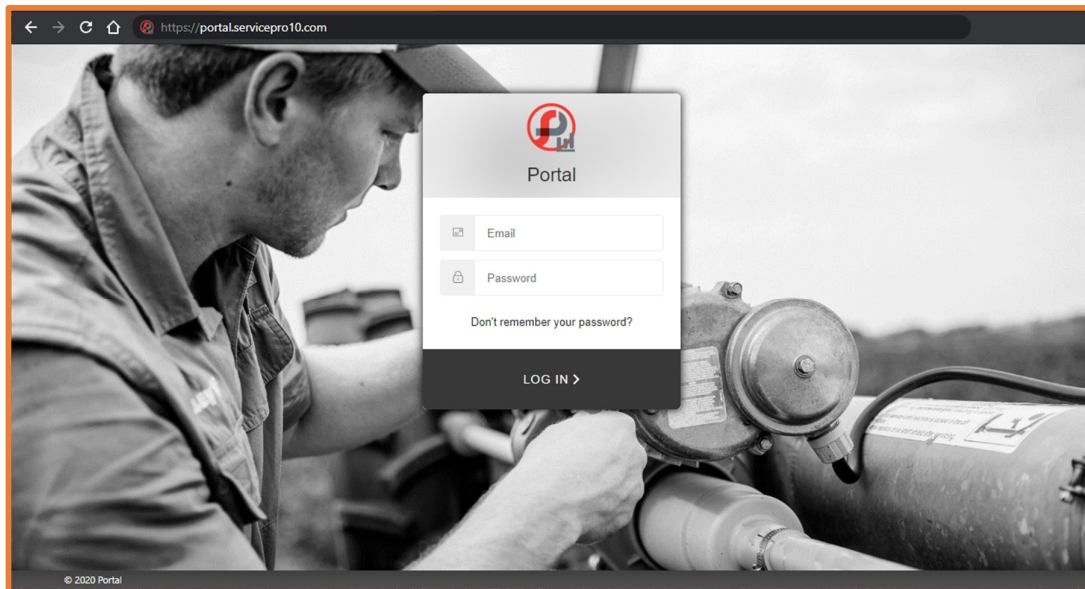
- ➔ The requirements you have met appear in green.
- ➔ The requirements you have not met appear in red.
- ➔ When your password meets all requirements, the list of requirements disappears.

After your password is successfully created, you can log in and begin to use the Customer Portal.



## ≡ LOG IN TO THE PORTAL

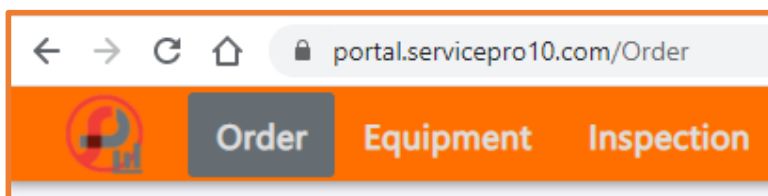
Users can access the Service Pro Customer Portal at <http://portal.ServicePro10.com>



- Log in with the email address where you received the email inviting you to the portal. This is the email address associated with your account, which will serve as your user name.
- Enter the password you created when you registered your account.
- Your session expires automatically after 1 hour, at which point you will need to log in again.

## ≡ NAVIGATION

The top navigation bar allows you to quickly go to the main pages you have access to in Customer Portal, which may include the following:



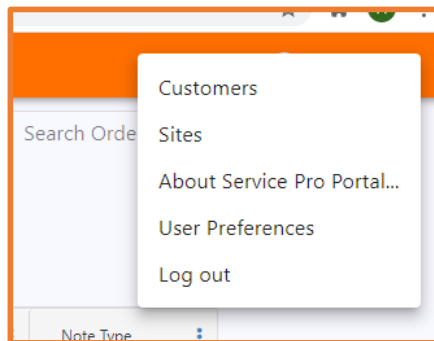
- **Order** – This page allows you to review specific orders and order details
- **Equipment** – This page allows you to review all equipment associated with your customer record.
- **Inspection** – This page allows you to review all inspections and attachments associated with your orders.



## ≡ USER MENU

You can click your name in the upper-right corner of the screen to access your user menu. This menu allows you to perform actions such as the following:

- View the customers and sites you have access to. Depending on your relationship to the BTU, you may only have access to one customer and one site.



- View information about the Customer Portal.
- Set your locale and language preferences. By default, these options are set to those of BTU.
- Log out of the Customer Portal



## ≡ WORK WITH ORDERS

After you log in to Customer Portal, the Order screen appears, where you can review the orders for your company:

The screenshot shows the 'Order screen' in the Customer Portal. It features a navigation bar at the top with tabs for 'ALL ORDERS' (99+), 'IN PROGRESS' (23), 'COMPLETED' (99+), 'ON HOLD' (99+), and 'SCHEDULED'. Below the navigation bar is a search bar with the placeholder text 'Search by Order # / Site Name / Cust' and a magnifying glass icon. To the right of the search bar is an 'ADVANCED SEARCH' button and a 'REQUEST SERVICE' button. The main content area displays a list of order details for a specific order. The details are organized into a grid-like structure with the following information:

Order Number 950630	Order Date Wednesday, 9 August 2017	Customer PO ---
Site Number AAA001-S	Site Name MSI TEST SITE	Site Address MSI TEST SITE FOR MSI TESTING ONLY, GUILDFORD GU1 1JB
Order Status COMPLETED	Progress Status ---	Latest Appointment Status NO FURTHER WORK REQUIRED
Priority 12hr Response Repair	Reason A-Z repairs	Planned Maintenance Description ---

At the bottom right of the screen, there are three icons: a clipboard with a pencil, a clipboard with a checkmark, and a trash can. The callouts in the image are: 1. Points to the navigation tabs; 2. Points to the search bar; 3. Points to the 'ADVANCED SEARCH' button; 4. Points to the order details grid; 5. Points to the bottom right icons.

On the Order screen, you can perform these actions:

- 1. Filter orders to find an order quickly based on its status**
  - ➔ **All orders** – Allows you to see all of your orders with no filters applied
  - ➔ **In Progress** – Currently this tab is not compatible with BTU's system. BTU will advise of an update when this is fully functional
  - ➔ **Completed** – Allows you to see all your past (completed) orders
  - ➔ **On Hold** - Currently this tab is not compatible with BTU's system. BTU will advise of an update when this is fully functional
  - ➔ **Scheduled** – Allows you to see any orders that are scheduled for a future date
- 2. Use the search bar to find a specific order**
- 3. Use the Advanced Search to filter the list of orders based on additional criteria**
  - ➔ This is particularly useful if you have many orders and you need to find a specific order based on limited information
  - ➔ You can use the Advanced Search filters to search based on partial order information such as the order date, PO Number or equipment
- 4. View high-level order information**
  - ➔ At a glance information to help determine the status and other key information for each order



## 5. Use the icons at the bottom of each order to view additional information



View and print order details from the Order Summary screen



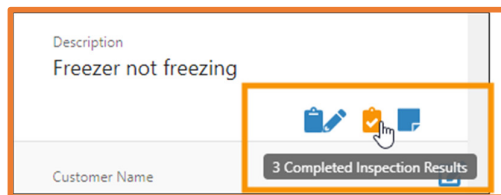
Review any inspection reports that were completed by the technician during an appointment

## REVIEW & DOWNLOAD INSPECTIONS (Engineer Reports)

If BTU has created an inspection report, you can download the report from Customer Portal. The inspection report includes the detailed information that was entered by the technician who performed the inspection, including any photographs that were taken

To review the inspections on an order, follow these steps:

- ➔ On the order, hover your mouse over the Inspection Results icon in the lower-right corner. A tooltip indicates whether an inspection has been added to the order:



- ➔ To review the inspections in more detail, click this icon. The Inspection Results window opens:

Inspection Name	Version Number	Completed By	Completed Date	Attachment
1 Electrical Inspection	1		---	---
2 Condenser Operational Check	1	joeschmo@fictionalmechan...	2/27/20, 4:11 PM	---
3 Evaporator Operational Check	1	joeschmo@fictionalmechan...	2/27/20, 2:54 PM	<a href="#">Download Attachment</a>

The information that you see on the Inspection Results window varies based on the information that is available for the inspection:

1. When an inspection is added to the order, an Inspection Name and Version Number appear on the window.
2. The Completed By column populates with the user ID of the BTU employee who completed the appointment. This may be the BTU engineer or the BTU administrator who processing the order in the office
3. When BTU generates an inspection report, a Download Attachment link appears. Clicking this link immediately downloads the PDF inspection report to your computer

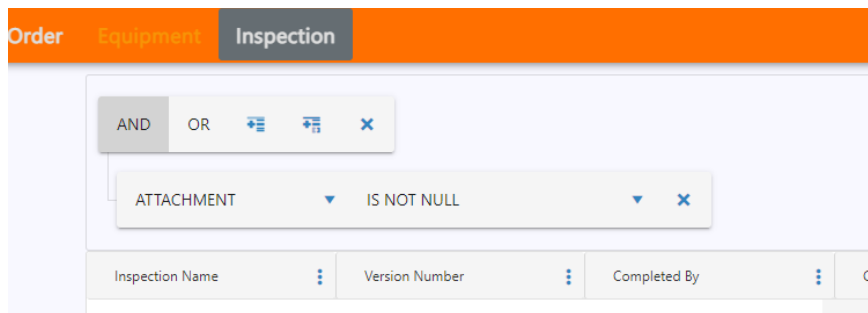


## ≡ WORK WITH INSPECTIONS

The Inspection screen allows you to return a list of inspections related to any order. This is useful if you have many inspections with attachments on your orders. Rather than finding individual orders and drilling into the inspection details to find information and view attachments, this screen allows for quicker access, as well as search capabilities.

Advanced search criteria allow you to filter the inspections based on certain criteria related to the inspection. A default filter returns a list of all inspections that have attachments. You can remove or edit the default filter to include inspections without attachments.

You can access this page by clicking the Inspection tab from the top navigation bar.



## ≡ WORK WITH EQUIPMENT (Assets maintained by BTU)

The Equipment/Asset screen allows you to return a list of all equipment related to your customer record. This helps you identify which of your equipment BTU has worked with. You can view the high-level details for each equipment item and export a list of equipment to Excel.

You can access this page by clicking the Equipment tab from the top navigation bar

The screenshot shows the top navigation bar with 'Order', 'Equipment', and 'Inspection' tabs. Below the navigation bar is a table with columns: 'Equipment Number', 'Inventory Number', 'Serial Number', 'Description', 'Customer Number', and 'Site Number'. The table contains six rows of equipment data. At the bottom of the table is a pagination control showing '1 - 10 of 55 items' and an 'EXPORT TO EXCEL' button.

Equipment Number	Inventory Number	Serial Number	Description	Customer Number	Site Number
1234	AHU	12234556790875	Air Handling Unit - make - model - 1234	AAA001	AAA001-S
ABC1234	FER1054508	65fe3d	FERNOX SYSTEM HEALTH CHECK INP0280	AAA001	Billing
	Boiler	88664422	Boiler - Heavenly - Jammie	AAA001	Billing
	Water Heater	---	Water Heater - Yellow - Green	AAA001	Billing
	Boiler	Abcd45665476543...	Boiler - Testedbychris - Best ever	AAA001	AAA001-S
	Water Heater	---	Water Heater - Same - 23	AAA001	AAA001-S



## ≡ REQUEST SERVICE (Or Repair)

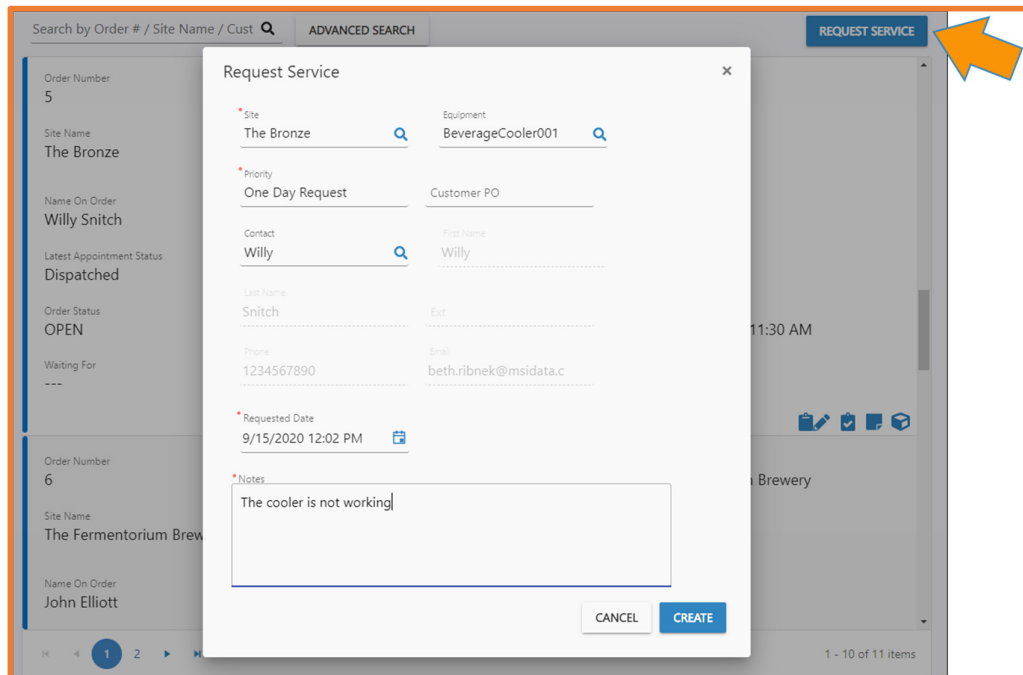
You can use the Customer Portal to request service or repair from BTU. By providing a few key pieces of information on a request form, you can create a new work order directly in BTU's back office system.

**PLEASE NOTE:** For any urgent callouts please continue to contact BTU as you normally would through our helpdesk.

The request service form should only be used for non-urgent items

To request service, follow these steps:

Click the Request Service button. The Request Service window opens:



The screenshot shows a web interface with a search bar at the top. A modal window titled "Request Service" is open, containing the following fields:

- Site:** The Bronze
- Equipment:** BeverageCooler001
- Priority:** One Day Request
- Customer PO:** (empty)
- Contact:** Willy
- First Name:** Willy
- Last Name:** Snitch
- First Name:** (empty)
- Phone:** 1234567890
- Email:** beth.ribnek@msidata.c
- Requested Date:** 9/15/2020 12:02 PM
- Notes:** The cooler is not working

Buttons for "CANCEL" and "CREATE" are at the bottom of the form. A yellow arrow points to the "REQUEST SERVICE" button in the top right corner of the page.

On the Request Service window, complete the following information:

- ➔ **Site** – Click this field to select a site. A dropdown appears with a list of the sites that you can choose from. If you have multiple sites available, be sure you select the correct site where service is needed.
- ➔ **Equipment** – After you select a site, click this field to select the equipment that needs service. A dropdown appears with a list of the equipment that is available at the site you selected. This field is optional and can be left blank if there is not a specific piece of equipment that needs service, or if the equipment record does not exist yet in the BTU system.



- **Contact** – You may have an existing customer contact record in the BTU’s system. If so, you can select your contact record using the lookup button next to the Contact field. After you select your contact record, the related fields populate with your name and the contact information that BTU has on file for you. Alternatively, you can skip the Contact field and manually enter your contact information in the name, phone number, and email address fields provided.
- **Requested Date** – The current date and time populate automatically. If you want to request a specific date and time for the appointment, click this field. A dropdown appears with Date and Time tabs, where you can pick the requested date and select a requested time.

**PLEASE NOTE: The date that you select is a request only. The appointment is not automatically scheduled. BTU will contact you to schedule the actual appointment.**

- **Notes** – Enter any additional information that you want to provide to BTU. The information that you enter in this field is saved as an order note. Describe why you are requesting a service or repair, more details about when you need the service performed, or any other pertinent information.

Click Create. A notification appears when the work order is successfully created, and the new order appears on your list of orders in the Customer Portal



Design

Install

Operate

Maintain

Repair



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