# Using the Customer Web Portal

**Quick Reference Guide**

## Log Into the Customer Web Portal

When your user login is set up on the portal, Tigerpaw Business Suite auto creates a password and emails you the 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. On the login page, enter your email address that received the login information.
4. Enter the password provided in the email.
5. Click Login. The Home Page displays.

## Log Out of the Customer Web Portal

Select Open Navigation > Log Off. The login page redisplays.

## Basis for Portal Security

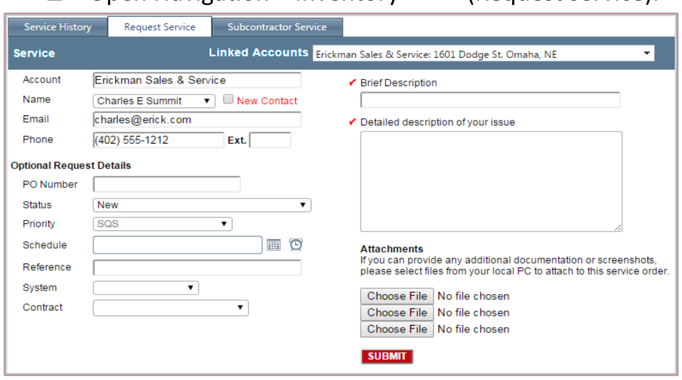
Portal security is based on **security roles**, such as supervisor or technician, and the **security permissions** granted or denied to each role, such as requesting quotes. The service provider sets roles and permissions. Users in your company granted access to the administrator role can assign roles to other users.

**NOTE**: Your security role determine which pages and functions are available when you log into the portal.

## Request Service

Follow these steps to enter a service request.

1. Use one of these methods to display 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).

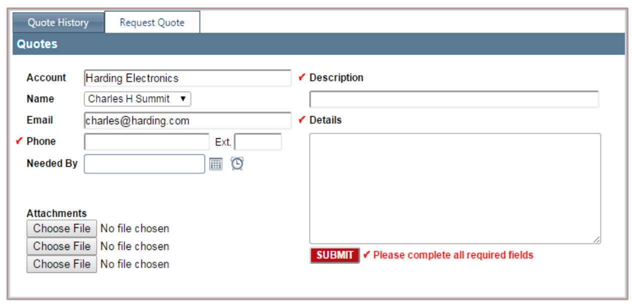



2. Click beside **Name** if you want to select a different contact. If **New contact** displays and you want to enter a new contact, select **New contact** to view additional fields.
3. Verify the contact information is correct.
4. Enter a **Brief description** of the issue.
5. Enter details in the **Detailed description of your issue** field.
6. Enter your **PO number** and requested **Priority**.
7. 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.

## Request a Quote

Follow these steps to enter a quote request:

1. Use one of these methods to display Request Quote fields:
   - Home Page > (Request quote).
   - Open Navigation > Quotes > Request Quote tab.



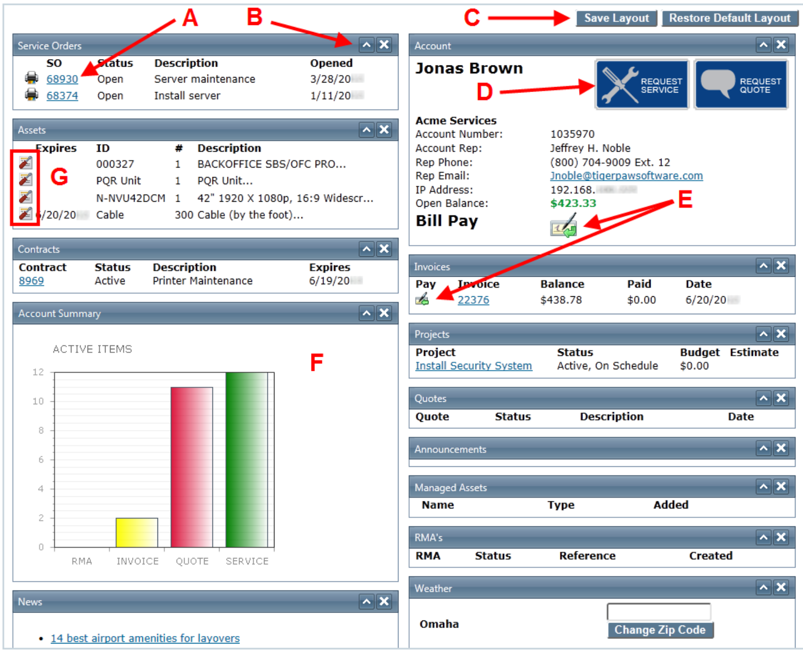

2. Click beside **Name** to select a different contact.
3. Verify the contact information is correct, including **Name**, **Email** and **Phone** number.
4. Enter a brief **Description** of the quote request.
5. In **Details**, enter the specific quote request, such as the intended quote outcome and 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 and navigate to the file location. Click Open to attach the document and return to the Request Quote tab.
8. Click Submit. The new opportunity number displays so you can easily track the request via the portal.

## Contact the Service Provider

Follow these steps to contact the primary rep on your account:

1. Select Open Navigation > Contact Us.
2. Verify or change the **Name**, **Email** and **Phone** values.
3. Enter your message to the service provider.
4. Click Send.

## Home Page Components




The Home Page layout is easy to customize. 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.

**Elements of 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** Click a button to request service or a quote.

**E** Click the button to pay invoices online, if the service provider offers this function.

**F** View the number of your open quotes, invoices, service orders, subcontractor service, and RMAs.

**G** Request service for a specific asset.

## Use 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.

From the Open Navigation menu, select these options to display a list view:

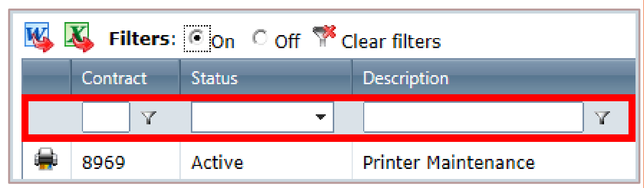
- **My Company > Employees**
  Add, update or flag your portal users as inactive.
- **Service > Service History**
  Click a service order to update or sign the service order.
- **Service > Subcontractor Service**
- **Quotes > Quote History**
  Accept, decline or sign quotes.
- **Contracts > Contracts**
- **Contracts > Agreements**
- **Invoices > Invoices**
- **Invoices > Credit Memos**
  Click an invoice number to print the related invoice.
- **Inventory > Customer Inventory**
  Add, delete, edit or request service for your asset items.
- **Inventory > Managed Assets**
- **Circuits**
  Add, delete or edit circuits.
- **RMA**
- **Projects**

These functions are available from the list views:

Export the list view to a Word document, if Word is installed on your workstation.

Export the list view to an Excel spreadsheet, if Excel is installed on your workstation.

**Filters** Click On or Off to display or hide filters below the column headings. Changing this setting affects all list views.




Enter or select criteria for one or more columns.

**NOTE**: your filters are automatically cleared when you move to a different page.

Clear all filter fields.

Select a filter condition, such as 'Contains' or 'Equal to'.

Display the document in a PDF preview window. To print the 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 Bill Pay is available.

Request service for the asset.

**Links** Click an underlined link to view the document. On the Projects page, you can send an email to the project rep by clicking the rep name.

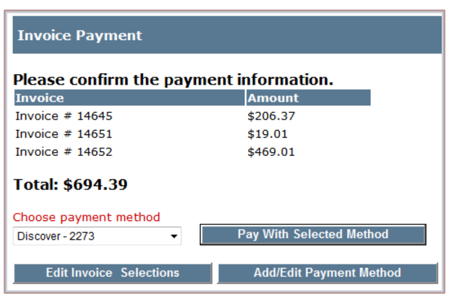
## Enter a Credit Card or ACH Payment

If the service provider accepts credit card or ACH/EFT payments through the portal, follow these steps to enter a payment:

1. Display the Invoice Payment page:
   - Home Page > (Bill pay).
   - Open Navigation > Bill Pay.
   - Open Navigation > Invoices > (Pay).


2. On the Invoice Payment page, select the checkbox beside each invoice to pay or check Select All to pay all invoices in the list.
3. The full balance defaults in the **Pay** field but you can enter a greater or smaller payment amount.

   **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.
4. Click Continue.




5. Review the selected invoices and payments. Click Edit Invoice Selections if you want to return to the invoice list.
6. Click ▼ to select one of your predefined payment methods.

   To add or modify an existing payment method, click Add/Edit Payment Method. The Payment Methods fields display on this page.

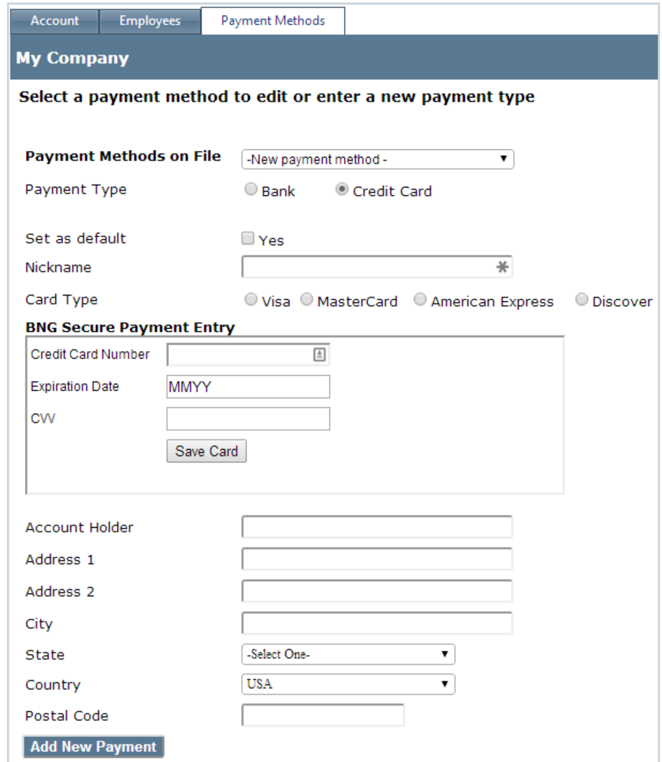
   When finished adding or modifying a payment method, click Done Editing Payments to hide the payment method fields.
7. To submit the payment, click Pay with Selected Method. Tigerpaw Business Suite immediately processes the payment.
8. Click Print a Receipt if you want a receipt for the payment.
9. Click Back to Bill Pay List to pay additional invoices.

## Manage Your Payment Methods

If the service provider accepts credit card or ACH/EFT payments through the customer portal, follow these steps to maintain your credit card or bank account information.

1. Select Open Navigation > My Company > Payment Methods.

   You can also access these fields by clicking Add/Edit Payment Method when entering a payment.




2. To edit an existing payment method, click ▼ beside **Payment methods on file** and select the method. To create a method, retain the default setting in this field.
3. Select the appropriate **Payment type**.
4. Select Yes if you want this payment method to default.
5. Enter a **Nickname** to easily identify the record, such as the payment type and last four digits (e.g. "Visa-4486").
6. Enter the exact **Account holder** name as it appears on the credit card or bank account.
7. Enter the address listed on the card or bank account.
8. Your card 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 payments – Enter the **Bank name**, bank **Routing number** and **Account number**. Select the **Account type**.
9. Click Add New Payment to save a new record or click Edit Payment to save changes to an existing record.

## Dispute an Invoice

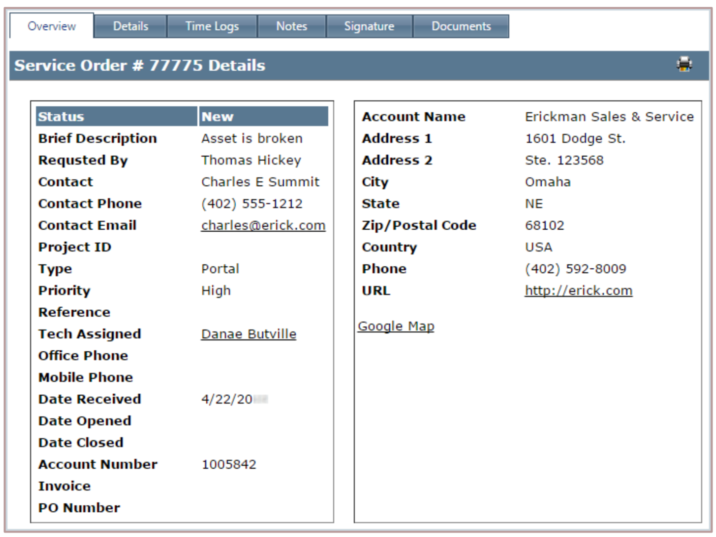
1. Display the Invoice Payment list. Refer to "Enter a Credit Card or ACH Payment" for instructions.
2. In the **Dispute** column, click the Dispute link for the invoice.
3. Enter the dispute reason.
4. Click Submit. The portal auto creates a service order and displays the service order number so you can easily track the service order via the customer portal.
5. Click Back to Bill Pay List to return to Invoice Payment.
6. You can pay all or part of a disputed invoice.

**NOTE**: If you set up automated payment processing for a recurring agreement, the scheduled payments are automatically processed regardless of whether you dispute the related invoice.

## 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 about the Service Order View

- Your service provider determines which tabs display.
- Service order information is uneditable. However, you can add notes and attachments from the Notes tab.
- If you are authorized to sign service orders for your organization, select Signature > Click to Sign.

  Enter your signature. To clear the signature field, click (Refresh). Click Save to exit the signature page.
- Click (Print) on the far right of the title bar to print the document, including the signature (if the order is signed).
- Click Close this Window to return to the previous page.

## Update Your Portal Profile

Follow these steps to update your portal user profile:

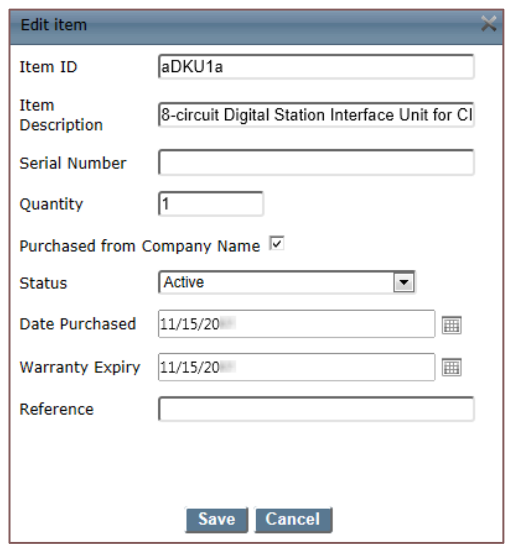
1. Select Open Navigation > My Profile.


2. Enter or update the appropriate information.
3. Click Save.

## Update or Delete Asset Items

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

Click Delete to remove an asset from inventory, or click Edit to display the item details.




- All fields are editable.
- Click (Calendar) to select a different purchase or warranty date.
- Click Save to save your changes or click Cancel to close the Edit Item fields without saving changes.

## Change Your Password

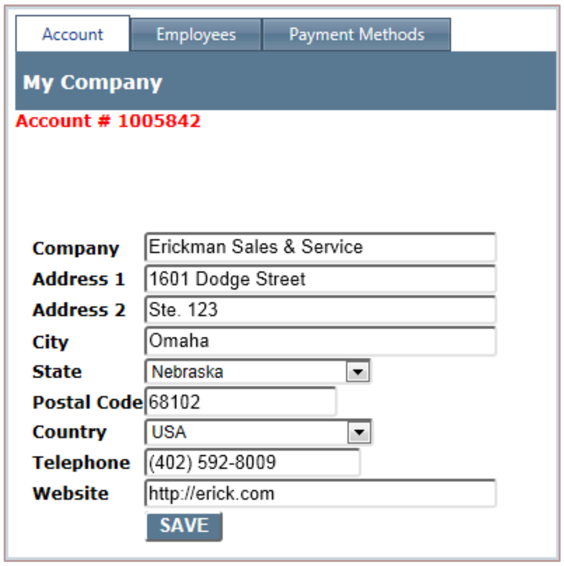
Follow these steps to update your user profile on the portal:

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

## Maintain Account Information

If your user ID is authorized to access secure functions, follow these steps to manage your company information:

1. Select Open Navigation > My Company.

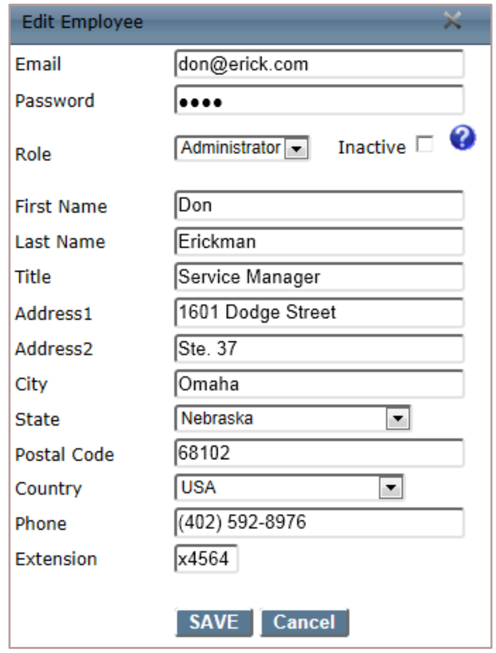



2. If your account is linked to related accounts, click beside **Linked accounts** to select a different account.
3. Enter or update account information.
4. Click Save.

## Maintain Employee Information

If your user ID is authorized to access secure functions, follow these steps to manage employees authorized to access the portal:

1. Select Open Navigation > My Company > Employees.
2. Click Edit to update an existing record or click (Add new employee) to create an employee portal record.




3. Enter or update the contact information. In the **Role** field, click to assign the appropriate security role. Roles determine which pages and functions are available.
4. Select **Inactive** to prevent the rep from accessing the portal. This field does not affect the Tigerpaw Business Suite rep record.
5. Click Save.

On the Employees tab, click (Refresh) to update the list.