

**Technisoft's Customer Portal provides your customer's with self service access to your business via the Internet 24/7. This contact method is convenient and time saving, and enables you to deliver a high quality of service and support.**

The Customer Portal add-on module provides your customer's with a secure web interface so they can submit service requests or ask for a quote, look up maintenance contracts and agreement details, review the status of open cases, service history, equipment management and a host of other relevant information exclusive to their own site.

Customers can log and monitor job requests anywhere, anytime. All that is required is a web browser and internet connection. Let your customers do the work, saving you time and money - Customer self service speeds up response times providing better customer satisfaction and as an added benefit, business overheads and costs are reduced as less time is spent on telephone logging information or answering questions.

Imagine your customers being able to log new job requests, view the status of their existing jobs, check their site and equipment details, including billing history, purchase details, total cost of ownership agreement/contract information, preventative maintenance schedules, and job related tasks and activities. Searches on Equipment are also readily available.




Endorsed Solution



User ID

Password

Company

Session Date  

**Log On**

Copyright © 1997-2009 Technisoft Pty Ltd.  
All rights reserved. Version 5.5A.1.1

**Open 24/7**



# Service Manager<sup>®</sup>

Integrates with Sage Accpac ERP Series

**Secure log in access** - Provide your customers with a link to a secure login page at your Website. Customers can then log in to their Customer Portal and create and monitor requests and access related information live.

**Communication is the key** - An email notification will be sent automatically to the Service Company when a request is entered by their customer through the Customer Portal. Support staff can process the request and post it into a Service Manager job or take other action, as required. Full chat functions are available, which can auto generate email alerts back to the Customer with each conversation if they are not chatting live.

**Request Management** - On the Service Company side manage Customer requests using the Request Manager program. With Request Manager, support staff can post requests to Jobs and manage them from one central point. Requests can be entered directly into the Request Manager making it ideal for internal use as well.

## Major functions in Customer WEB Portal include...

**My Dashboard** - Customers or internal staff can view their requests from the Dashboard. Administrator users can view all Requests & and other jobs that may have been created internally and published to the Customer Portal. e.g. Preventative Maintenance jobs.

Request	Job	Site	Site Name	Entered	Req. State
<a href="#">DRQ000000025</a>	<a href="#">JOB000001143</a>	<a href="#">1100</a>	Bargain Mart - San Diego	7/1/2010 10:22 AM	Job In Progress
<a href="#">DRQ000000027</a>	<a href="#">JOB000001141</a>	<a href="#">1100</a>	Bargain Mart - San Diego	7/2/2010 12:37 AM	Job In Progress
<a href="#">DRQ000000026</a>	<a href="#">JOB000001145</a>	<a href="#">1100</a>	Bargain Mart - San Diego	7/2/2010 12:37 AM	Request Closed
<a href="#">DRQ000000052</a>		<a href="#">1100</a>	Bargain Mart - San Diego	6/19/2009 3:07 PM	Held
<a href="#">DRQ000000051</a>		<a href="#">1100</a>	Bargain Mart - San Diego	6/11/2009 12:08 PM	Held
<a href="#">DRQ000000050</a>		<a href="#">1100</a>	Bargain Mart - San Diego	6/11/2009 10:20 AM	Held
<a href="#">DRQ000000046</a>		<a href="#">1100</a>	Bargain Mart - San Diego	6/2/2009 10:11 PM	Held
<a href="#">DRQ000000044</a>		<a href="#">1100</a>	Bargain Mart - San Diego	6/1/2009 1:53 PM	Cancelled
<a href="#">DRQ000000043</a>	<a href="#">JOB000001146</a>	<a href="#">1100</a>	Bargain Mart - San Diego	6/1/2009 1:44 PM	Job Completed
<a href="#">DRQ000000031</a>		<a href="#">1100</a>	Bargain Mart - San Diego	5/15/2009 1:50 PM	Pending

**Workflow indicators** - Requests requiring attention are clearly marked. A Request may require attention from the Customer, service company support staff, or require no attention at all.

Req. State	Ref.	Manuf.	Model Description	Equipment	
Job In Progress	PO1234	Panasonic	Panasonic Laser Printer / Copier	<a href="#">12341234</a>	
Job In Progress		NEC	NEC PIII 500Mhz Computer2	<a href="#">A53266-90</a>	
Request Closed		NEC	NEC PIII 500Mhz Computer2	<a href="#">A53266-90</a>	●
Held					●
Held	PO2002	Panasonic	Panasonic Laser Printer / Copier	<a href="#">12341234</a>	●
Held	PO2001				●
Held					●
Cancelled		NEC	NEC PIII 500Mhz Computer2	<a href="#">100000</a>	●
Job Completed		NEC	Mobile Digital Telephone NEC2100	<a href="#">3422rrt4455</a>	
Pending	104	Panasonic	Panasonic Laser Printer / Copier	<a href="#">12341234</a>	●

Attention Service Manager

Attention Customer

The "Attention" flags are set automatically when a request is created in the Customer Portal or when a chat message is sent to or from the Customer.

**Chat** - Use the chat facility to communicate between customer and support staff. Send an automatic email no support staff when the customer sends a new chat message request.

**Search** - Search for individual Equipment or Equipment by model, description, serial number and more.

**Job Details** - Job information; equipment on Job, Tasks and activities associated with the job

**Site Details** - Site information, Requests for the site, Tasks for the site, Invoices, Credit notes and cost only transactions for the Site

**Equipment/Site Details** - View online Equipment information, Site details; Financial details including TCO; Warranty information;

**Invoices** - View and Reprint invoices as required.

Prerequisites - IIS w/ ASP.NET support; .NET framework 3.5, Sage Accpac ERP 5.5A w/ Sage Accpac .NET Libraries; Service Manager 5.5A or higher, Windows XP Pro Sp3 and above, Windows Vista Business & Ultimate, Windows 7; Windows Server 2003 R2 and above, Windows Server 2008.

Customer Prerequisites - Web browser with Internet connection

