Servin Job Management System

Client Portal User Guide

Version 1.0

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Contents

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Version	Prepared by	Date	Change description
0.1	Jonathan Wood	31/01/2011	First Draft
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1 About this Document

Client Portal User Guide for Servin JMS v3.1.1365

2 System Requirements

The Servin JMS Client Portal has been tested and approved for use in the following browsers:

- Microsoft Internet Explorer v. 8, 9
- Mozilla Firefox 3.6+
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The Servin JMS Client Portal uses PDF formatted documents where printing is necessary; you will need the latest version of Adobe Acrobat Reader installed to make use of these features. You can download and install this application from http://get.adobe.com/reader/.

You will need a valid email address to receive system notifications.

3 Login

Your login name is usually your email address but is not necessarily. If you are unsure please contact your Client Portal manager for assistance in the first instance.

If you forget your password, your Client Portal Manager can reset it for you. If you are a Client Portal Manager abd have forgotten your password, please contact your service provider and they can reset it for you.

4 User Types

There are four user types in the Client Portal. (The ‘CP’ prefix simply stands for Client Portal). The system functionality available to the user is dependent on their user type. They are:

4.1 CP Manager

This is the highest access level. This user can;

- Request jobs directly (no approval required).
- Approve other user’s job requests.
- View all jobs and job requests.
- View financial information.
- View and request changes to customer info.
- Add, edit and archive all users.

4.2 CP Delegate

This user can;

- Request jobs directly (no approval required).
- Approve other user’s job requests.
- View currently active jobs and job requests.
- View and request changes to customer info.
- They cannot view any financial information.

4.3 CP Approved User

This user can;

- Request jobs directly (no approval required).
- View currently active jobs and job requests.
- View customer information but not request changes to that information
- They cannot view any financial information.

4.4 CP User

This is the most basic user type and can;

- Request jobs (subject to approval).
- View only their own jobs and job requests.
- View customer information, but not request changes to that information.
- They cannot view any financial information.

5 Home Page

The first screen you will see upon logging in successfully is the Home page. This will display all relevant jobs and job requests for your user type, including:

- Active Jobs
- Jobs recently closed (last week)
- Jobs awaiting activation (by your service provider)
- Jobs awaiting approval (by your Client Portal manager)

You can always return to this page by clicking the ‘Client’ link (at the top of the menu).

If you administrate more than one customer a drop down selection box will appear at the top of the page to allow you to choose which customer’s job information you wish view.

Clicking either the Job Number or Job Title will take you to the View Job screen where you can view the job information and progress notes.

If the job has been closed and invoiced, you will be able to click on the Invoice Number to view the invoice for this job (in PDF format).

5.1 View Job

When viewing a job (see 4 above), the “Back” button will return you to which ever page you were previously viewing. The “Email Support about this Job” will take you to a new screen where you can send an email to your service provider’s support staff for any reason; once sent you will be returned to the “Job View” and you will see the message you’ve just sent in the “Job Notes Log”.

5.2 Job Notes Log

This is a record of additional information relating to the job.

5.3 Job Work Log

This is a record of actual labour assigned to the job.

5.4 View Request

When viewing a job request (see 4 above), the “Back” button will return you to which ever page you were previously viewing. The “Delete This Request” will delete the request and return you to the Home Page. The “Approve This Request” button will approve this request and an email will automatically be generated and sent to your service provider’s support staff to advise there is a job request to be actioned. In either of these instances, you can enter additional comments.

6 Customer Info

If you administrate more than one customer a drop down selection box will appear at the top of the page to allow you to choose which customer's information you wish view.

This page displays all customer and transactional information available to the user, including:

6.1 Customer Details

Displays the current details on record for the customer as well as account management and status information. You can request a change to this information from this screen by using the "Change of Details" section (instructions are on the page).

6.2 Job List

Displays tabs for open jobs, closed jobs, AMA (Active Maintenance Agreement) jobs, and all jobs. Clicking the Job Number or Job Title will open that job for viewing (see 5.1 View Job).

This data can be sorted in ascending or descending order by clicking on the various column headings. However, not all headings can be used to sort the data.

6.3 AMA Schedule

Displays the customer's current AMA (Active Maintenance Agreement) schedule, (if any).

6.4 Invoices

Displays a list of all the customer's invoices. Clicking the Invoice Number or Description opens the invoice in PDF (Adobe Acrobat) format. Clicking the Job Number will open that job for viewing (see 5.1 View Job).

This data can be sorted in ascending or descending order by clicking on the various column headings. However, not all headings can be used to sort the data.

6.5 Payments

Displays a list of all the customer's payments and allows viewing of allocations between payments and invoices (credits and debits). Clicking the Payment ID will open that payment for viewing and will display any invoices it has been allocated to; from there you can click the Invoice Number to view in PDF format.

This data can be sorted in ascending or descending order by clicking on the various column headings. However, not all headings can be used to sort the data.

6.6 Statements

Displays a list of all the customer's statements. Clicking the Statement Number or Period Date opens the statement in PDF (Adobe Acrobat) format.

This data can be sorted in ascending or descending order by clicking on the various column headings. However, not all headings can be used to sort the data.

6.7 Current Balance

Displays a summary of the customer's transactions since the latest statement. Clicking the Statement Date opens the statement in PDF (Adobe Acrobat) format. Clicking the Invoice Number/Date opens the invoice in PDF (Adobe Acrobat) format. Clicking the Payment ID/Date will open that payment for viewing and will display any invoices it has been allocated to; from there you can click the Invoice Number to view in PDF format.

6.8 Prepaid Hours

Displays current balance and all transactions of prepaid hours purchased under a Service Level Agreement (if applicable). Clicking the Invoice Number opens the invoice in PDF (Adobe Acrobat) format.

This data can be sorted in ascending or descending order by clicking on the various column headings. However, not all headings can be used to sort the data.

7 Request Job

From this page you can request new jobs.

Compulsory fields are:

- Customer (as above).
- Contact person
- Contact phone number
- A brief job title
- General symptoms that describe the issue(s) you are encountering.

If you administrate more than one customer a drop down selection box will appear at the top of the page to allow you to choose which customer you wish to request a job for.

Depending on your access, a notification email will either be sent to your Client Portal manager to approve the job request, or sent to the service provider to action it.

8 View Job

To view a specific job you may enter a Job Number directly or you may be redirected here from other parts of the system when clicking on a link to a job. You may only view jobs belonging to customers you are authorised to view.

9 Edit User

This is where you may edit your own user details and password.

Compulsory fields are:

- Full name
- User name
- Email address
- Access level/user type (if applicable).

Note: The “Save” and “Change Password” buttons remain disabled until all compulsory fields are completed satisfactorily.

10 Add User

This is where you may add a new user.

Compulsory fields are:

- Full name
- User name
- Password
- Confirm password
- Email address
- Access level/user type (if applicable).
- Customers this user can access (if applicable).

Note: The “Add” button remains disabled until all compulsory fields are completed satisfactorily.

11 User List

From here you can view a list of all users for all customers you administrate.

Clicking the user's name will open the Edit User screen for that user.

You may archive users from here if you have sufficient access to do so via the check boxes in the far right column. If you archive a user by mistake, please contact your service provider to reverse this.

If you administrate more than one customer a drop down selection box will appear at the top of the page to allow you to choose which customer's users you wish view.