

The simPRO Customer Portal



Serious Job Management



The simPRO Customer Portal

This white paper covers the industry relevance and important functionality of the simPRO Customer Portal available with simPRO.

If you're looking to create a unique proposition to your customers, the online Customer Portal could be the answer you're looking for. Having this level of functionality is often a requirement in larger tenders and can be the factor in gaining more work and trust by distinguishing yourself when working with other commercial, government and industrial customers in a very competitive market.

Getting Started

The Customer Portal is included as part of the simPRO system. To begin, the user will open the customer record and issue the customer with a username and password. simPRO will then give the option to send the details to your customers.

The screenshot shows the 'Customers / ABC Enterprises' interface. The 'Settings' tab is active. The 'Customer Profile' section is highlighted with a red box. It contains the following fields:

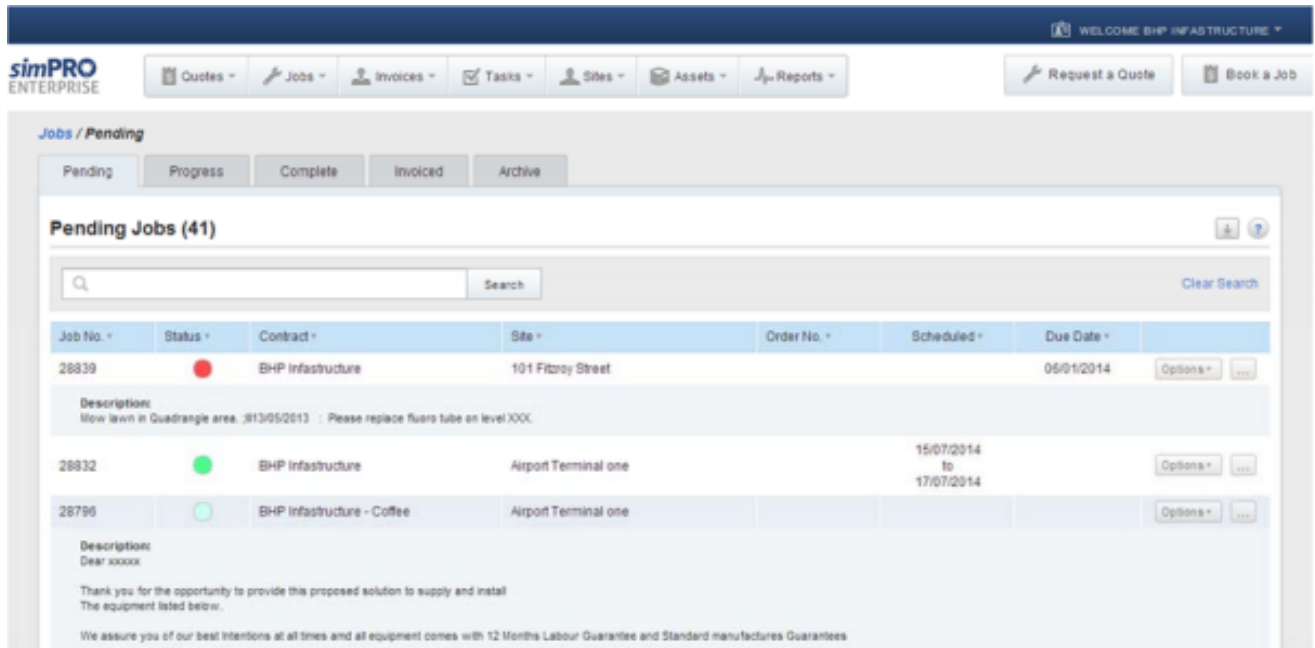
- * Username: acme
- Password: Password Set
- Account Manager: Not Selected
- Allow customer to send jobs to your system
- Customer Group: Not Selected
- Customer Profile: Not Selected
- Service Job Cost Centre: Electrical Service
- Default Invoice Template: Not Selected
- Default Invoice Method: Print
- Preferred Notification Method: Not Selected
- Referred By: [Empty]
- Currency: GBP

Organisations operating simPRO will use the Customer Portal to give their customers limited access to relevant information about jobs, sites, assets, schedules, invoices, quotes, tasks and reports that the organisation is storing and currently using in relation to that customer. Allowing access to this live information, customers will be able to serve themselves rather than adding to your administrative overhead. It will also contribute to establishing greater trust with your customers as the information is constantly live and accessible to them. Each module's status is controlled by the system setup, giving you complete control of what your customers have access to.

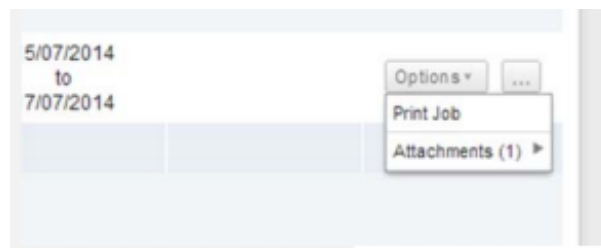
Allowing your customer to log new jobs and quotes directly into your system (requiring your approval) gives your customer more control thereby lowering the burden on your existing office capacity.

Jobs & Quotes

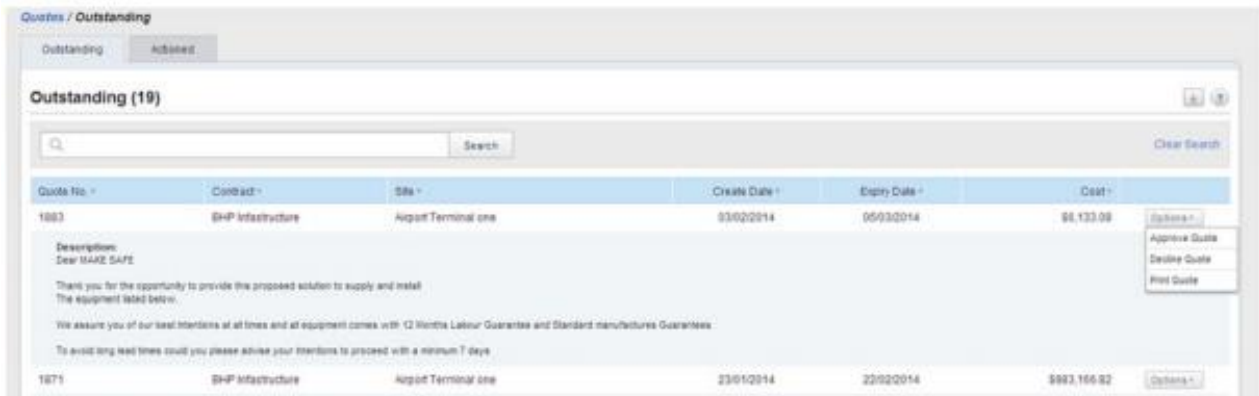
One of the key features of the Customer Portal is the ability to access historic and current jobs. Allowing access to jobs that are currently in progress gives customers the highest level of information regarding job status. For example, customers can see if the job is in progress, put on hold, or been completed. Furthermore, giving access to historical job records allows customers to run a search that normally would require contact with you. Instead they can do all the searching themselves in seconds.



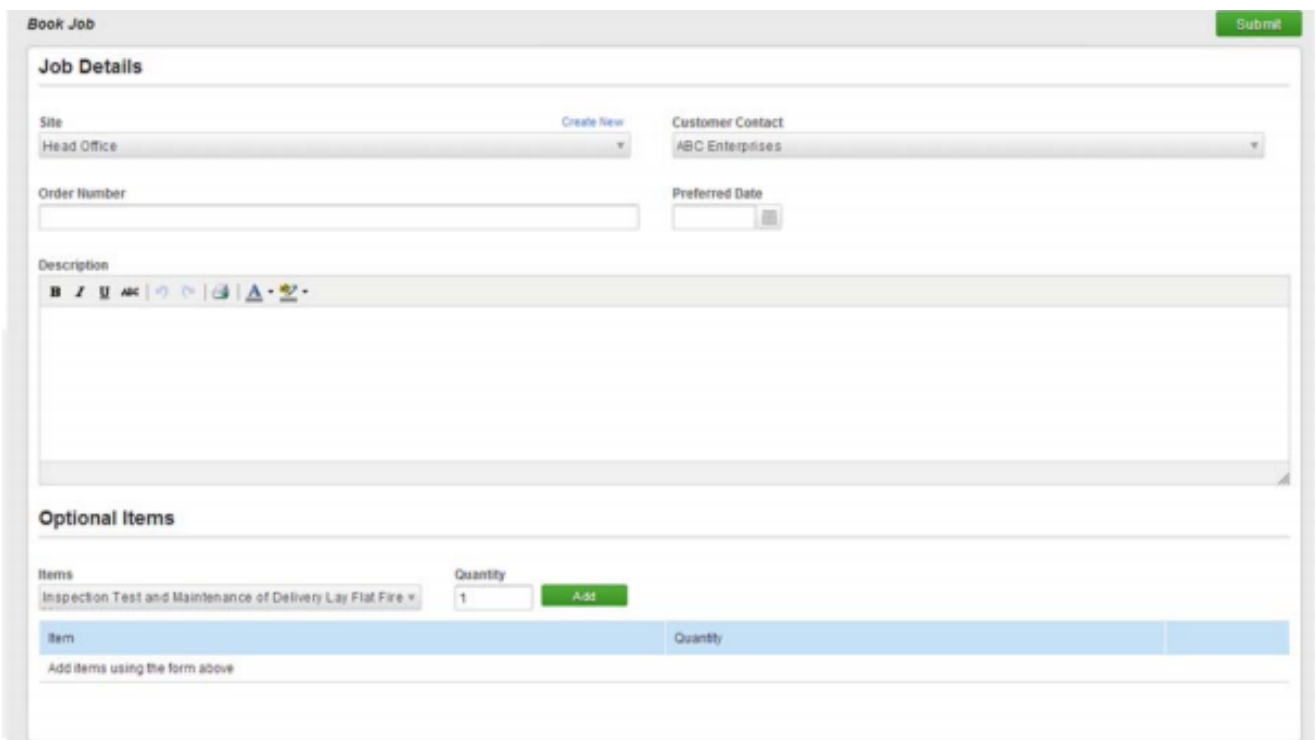
Accessing the job in the Customer Portal also gives the customer access to other pertinent job attachments that you have deemed appropriate to share with them, such as job safety audits or photos of the installed switchboard. You can also choose to keep this information private.



The system also allows quotes to be downloaded and viewed, then either approved or declined online.



Giving your customers access to the Customer Portal also gives them the option to log jobs directly into your system. The customer needs to select which site the work is to occur on, give an order number and specify a preferred date and description of the work to be carried out. This again gives your customer more control, lowers your overheads and provides a better customer experience. If you have a set of rates or services that you have enabled online the customer will also be able to select these for inclusion in the job.



Invoices

With the Invoice module enabled you are able to expose information to your customers relating to their outstanding and paid invoices, as well as historical and current statements.

Invoices / Unpaid

All Unpaid Paid

Unpaid Invoices (36)

Search Clear Search

Invoice No.	Status	Job No.	Date Issued	Due Date	Days Overdue	Site	Price	Paid	
175690	●	26127	15/07/2014	15/07/2014	1	101 Filzoo Street	\$262.90	\$0.00	Options
175689	●	26832	15/07/2014	15/07/2014	2	Airport Terminal one	\$1,976.57	\$0.00	Options
175675	●	26324	12/07/2014	12/07/2014	5	Lef.83, Seburo Name	\$1,850.00	\$0.00	Options
175310	●	26153	17/03/2014	17/03/2014	122	Olympic Dam	\$3,552.95	\$0.00	Options
175308	●	26144	14/03/2014	14/03/2014	125	Airport Terminal one	\$2,200.00	\$0.00	Options
175307	●	26144	14/03/2014	14/03/2014	125	Airport Terminal one	\$2,096.00	\$0.00	Options
Total							\$313,599.15	\$0.00	

Page Summary

Current	1-30 Days	31-60 Days	61-90 Days	91+ Days	Total	
\$0.00	\$45,060.38	\$31,198.34	\$29,150.88	\$207,191.87	\$313,599.15	

Your customers will be able to download their outstanding and historical invoices as PDF's, view their outstanding accounts and print off their own statements. This can be useful when your customers are attempting to reconcile their accounts with your own.

Customers / BHP Infrastructure / Statement

Statement Cancel

Statement - BHP Infrastructure

Filter Filter

Date Range: 01/07/2014 - 18/07/2014 Search Reset

Summary

Current	1-30 Days	31-60 Days	61-90 Days	91+ Days	Total	Relations Held
\$0.00	\$35,998.36	\$0.00	\$0.00	\$0.00	\$35,998.36	\$0.00

Invoices (8)

Date	Description	Order No.	Debit	Credit	Balance
01/07/2014	Invoice No. 175636 - Claim No. 1		\$4,850.00	\$0.00	\$4,850.00
03/07/2014	Invoice No. 175644 - Claim No. 1		\$5,600.00	\$0.00	\$10,450.00
03/07/2014	Invoice No. 175655 - Claim No. 2		\$0.00	\$0.00	\$10,450.00
06/07/2014	Invoice No. 175654 - Claim No. 1		\$5,355.57	\$0.00	\$15,805.57
08/07/2014	Invoice No. 175653 - Claim No. 2		\$13,127.34	\$0.00	\$28,932.91
10/07/2014	Invoice No. 175669 - Claim No. 2		\$0.00	\$0.00	\$28,932.91
12/07/2014	Invoice No. 175674		\$5,152.05	\$0.00	\$34,084.96
12/07/2014	Invoice No. 175675 - Claim No. 1		\$1,850.00	\$0.00	\$35,934.96
15/07/2014	Invoice No. 175690 - Claim No. 2		\$262.80	\$0.00	\$35,998.36
Total					\$35,998.36

[Print Statement](#)

Sites, Assets and Reports

In simPRO, a site is typically the physical location where the work is occurring. simPRO has a many to many relationship between sites and customers, meaning one customer can have many sites and likewise one site can have many customers. The Sites module in the Customer Portal allows customers to view what sites you have performed work on, the site specific files you have on record for, and the contact details for the site.

As sites are where the physical work happens, it is also where customer assets are recorded. The Assets module within the Customer Portal will show a list of all sites the customer has where you have asset details recorded. On drilling into the site they can then see all asset types and all assets on site, along with the associated details, job history and transfer history of the equipment.

The reports in the Customer Portal revolve around testing regimes of the customer's jobs and assets. The reports provide a level of transparency and automation to your customer that they would otherwise have to spend a significant amount of time to receive the same level of service.

Site	Site Address	Site Suburb	Site State	Site Postcode	Options
101 Fitzroy Street	101 Fitzroy Street	Fitzroy	VIC	3066	Options
Airport Terminal one	Airport Drive	Mascot	NSW	2020	Options
Bank West Tower	123 Wingham St	Taree	NSW	2430	Options
Balaclava - VIC - Lots 1-90	81st Hill Road	Balaclava	VIC	3213	Options
Building 32	123 Smith Street	Bundaberg			Options
Excavator ABC-429	100 Site St	Rydalmere	NSW	2116	Options
Harold Park Hotel	70a Rosa St	Glebe	NSW	2037	Options
Head Office	1 King William St	Adelaide	SA	5000	Options
Lot 80, Suburb Name	Lot 80 Parawana Road	Chullora	NSW	2190	Options
NA/NA	NA	NA	QLD		Options
Olympic Dam	Logan Rd	Brisbane			Options
Valentines					Options

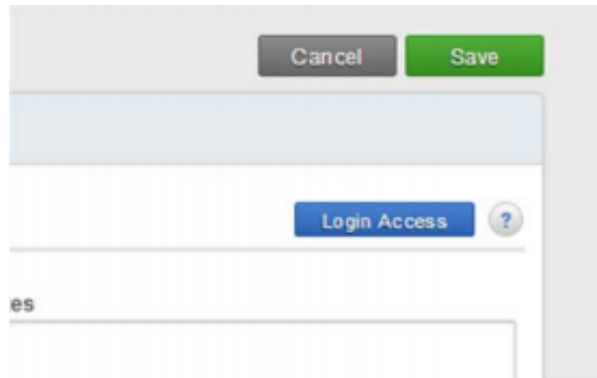
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Asset ID	Date Checked	Service Level	Job No.	Technician	Notes	Asset Number	Level	Location	Type	State	Model	Diffuser	Comments
95	18/02/2013	Annually	26127	Stephen Bradshaw		36279372	Level Four	89789	EIL		1 x 35w		
101 Fitzroy Street - HVAC													
212	22/11/2013		27498	Tom the Tester		862020		0001	Level Five		Kitchen		Installed by Aircom
420	12/03/2014		28125	Tim Toolman		4556655							
101 Fitzroy Street - Grid Connect Panels													
406	11/02/2014		27832	Tim Toolman		Fitted					Manufacture		Dujz

Customer Portal Sub-users

As well the ability to create user accounts to issue to customers, your customers can also create sub user accounts to allocate to their own staff. For example, if a customer has a large number of facilities each with their own building or facility manager, they may choose to give a particular building manager access to the Customer Portal, though only to the jobs that exist within their own building. This is a very powerful feature and value add to offer your customers, especially when looking for large tenders spanning across a broad geographic region.



Customers will also have the option to restrict access to a subset of pages, reports and sites that you have agreed upon within the Customer Portal. It is entirely definable and administered by the customers.

