

White Paper

The simPRO Customer Portal

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

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 Enterprise 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.

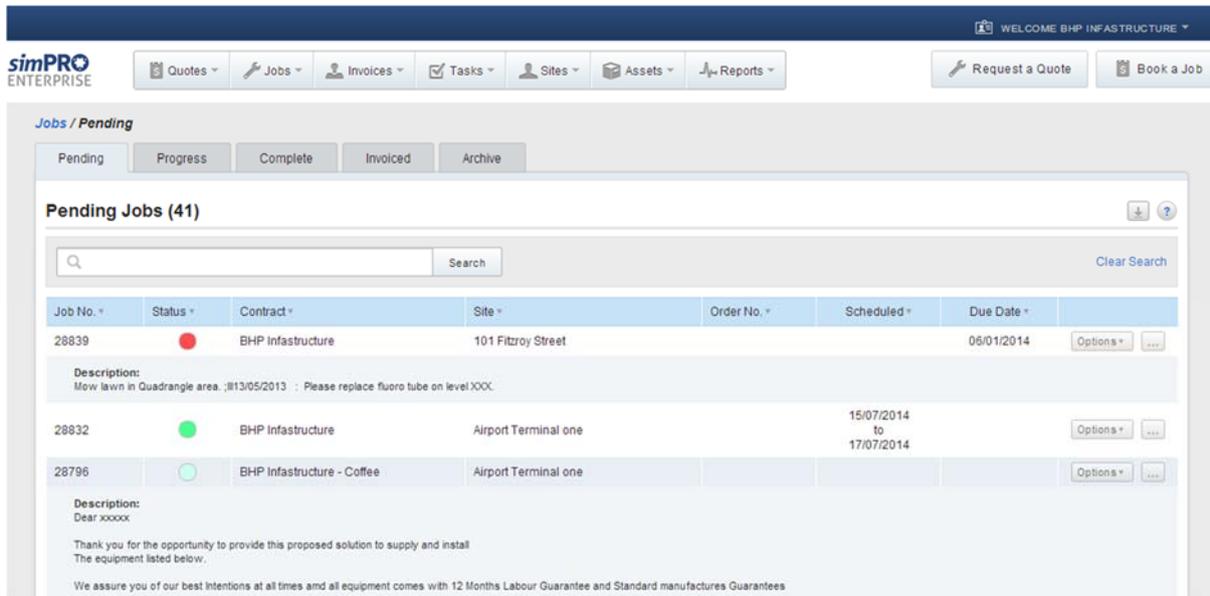
The screenshot displays the 'Customer Profile' settings for 'ABC Enterprises'. The 'Settings' tab is active, showing fields for Username, Password, Account Manager, Customer Group, Customer Profile, Service Job Cost Centre, Default Invoice Template, Default Invoice Method, Preferred Notification Method, Referred By, and Currency. A red box highlights the Username and Password fields, which are currently set to 'acme' and 'Password Set' respectively. Below these fields is a checkbox labeled 'Allow customer to send jobs to your system'.

Organisations operating simPRO Enterprise 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.

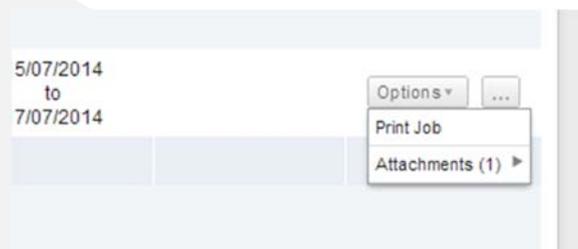
Allowing your customer to log new jobs and quotes directly into your system (requiring your approval) gives your customer more control thereby lowering the burden on your existing office capacity.

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.

Quotes / Outstanding

Outstanding Actioned

Outstanding (19)

Search Clear Search

Quote No. ▾	Contract ▾	Site ▾	Create Date ▾	Expiry Date ▾	Cost ▾	Options ▾
1883	BHP Infrastructure	Airport Terminal one	03/02/2014	05/03/2014	\$6,133.08	Options ▾ Approve Quote Decline Quote Print Quote
<p>Description: Dear MAKE SAFE</p> <p>Thank you for the opportunity to provide this proposed solution to supply and install The equipment listed below.</p> <p>We assure you of our best intentions at all times and all equipment comes with 12 Months Labour Guarantee and Standard manufactures Guarantees</p> <p>To avoid long lead times could you please advise your intentions to proceed with a minimum 7 days</p>						
1871	BHP Infrastructure	Airport Terminal one	23/01/2014	22/02/2014	\$983,166.82	Options ▾

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.

Book Job Submit

Job Details

Site: Create New Customer Contact:

Order Number: Preferred Date:

Description:

Optional Items

Items: Quantity: Add

Item	Quantity
Add items using the form above	

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	Options *
176690	●	26127	16/07/2014	16/07/2014	1	101 Fitzroy Street	\$262.80	\$0.00	Options *
176689	●	28832	15/07/2014	15/07/2014	2	Airport Terminal one	\$1,076.57	\$0.00	Options *
176675	●	28324	12/07/2014	12/07/2014	5	Lot 80, Suburb Name	\$1,650.00	\$0.00	Options *
176310	●	28153	17/03/2014	17/03/2014	122	Olympic Dam	\$3,552.95	\$0.00	Options *
176308	●	28144	14/03/2014	14/03/2014	125	Airport Terminal one	\$2,200.00	\$0.00	Options *
176307	●	28144	14/03/2014	14/03/2014	125	Airport Terminal one	\$2,090.00	\$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	\$46,060.08	\$31,196.34	\$29,150.86	\$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 A

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

Summary

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

Invoices (9)

Date *	Description *	Order No. *	Debit *	Credit *	Balance *
01/07/2014	Invoice No. 176636 - Claim No. 1		\$4,950.00	\$0.00	\$4,950.00
03/07/2014	Invoice No. 176644 - Claim No. 1		\$5,500.00	\$0.00	\$10,450.00
08/07/2014	Invoice No. 176656 - Claim No. 2		\$0.00	\$0.00	\$10,450.00
08/07/2014	Invoice No. 176664 - Claim No. 1		\$5,355.57	\$0.00	\$15,805.57
08/07/2014	Invoice No. 176653 - Claim No. 2		\$13,127.94	\$0.00	\$28,933.51
10/07/2014	Invoice No. 176669 - Claim No. 2		\$0.00	\$0.00	\$28,933.51
12/07/2014	Invoice No. 176674		\$5,152.05	\$0.00	\$34,085.56
12/07/2014	Invoice No. 176675 - Claim No. 1		\$1,650.00	\$0.00	\$35,735.56
16/07/2014	Invoice No. 176690 - Claim No. 2		\$262.80	\$0.00	\$35,998.36
Total					\$35,998.36

[Print Statement](#)

Sites, Assets and Reports

In simPRO Enterprise, 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.

Sites

Sites (12)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Search Clear Search

Site	Site Address	Site Suburb	Site State	Site Postcode	Options
101 Fitzroy Street	101 Fitzroy Street	Fitzroy	VIC	3065	Options
Airport Terminal one	Airport Drive	Mascot	NSW	2020	Options
bank West Taree	123 Wingham St	Taree	NSW	2430	Options
Batesford - VIC - Lots 1-80	Brior Hill Road	Batesford	VIC	3213	Options
Building 32	123 smith street	Bundaberg			Options
Excavator ABC-829	100 Site St	Rydalmere	NSW	2116	Options
Harold Park Hotel	70a Ross St	Glebe	NSW	2037	Options
Head Office	1 King William St	Adelaide	SA	5000	Options
Lot 80, Suburb Name	Lot 80 Paraweena Road	Chullora	NSW	2190	Options
NA Na	NA	NA	QLD		Options
Olympic Dam	Logan Rd	Brisbane			Options
Valantaines					Options

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.

Reports / Assets / Current Defects

Assets

Current Defects

* Site: 101 Fitzroy Street Asset Type: All Search

101 Fitzroy Street -

Asset ID	Date Checked	Service Level	Job No.	Technician	Notes	Asset Number	Level	Location	Type	Make	Model	Diffuser	Comments
95	18/02/2013	Annually	26127	Stephen Bradshaw		38276372	Level Four	89789	EXL	1 x 36w			

101 Fitzroy Street - HVAC

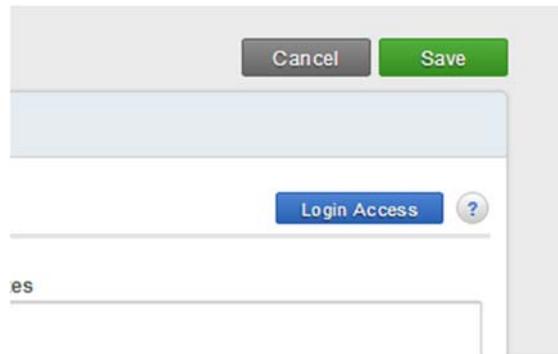
Asset ID	Date Checked	Service Level	Job No.	Technician	Notes	Serial Number	Asset Number	Level	Location	Comments
212	22/11/2013		27498	Tom the Tester		902020	0001	Level Five	Kitchen	Installed by Aircom
429	12/03/2014		28125	Tim Toolman		4556655				

101 Fitzroy Street - Grid Connect Panels

Asset ID	Date Checked	Service Level	Job No.	Technician	Notes	Serial Number	Manufacture	Model
406	11/02/2014		27932	Tim Toolman		Fjdjdd		Djuz

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.

