

QuikOne FSM

User Guide – Customer Portal

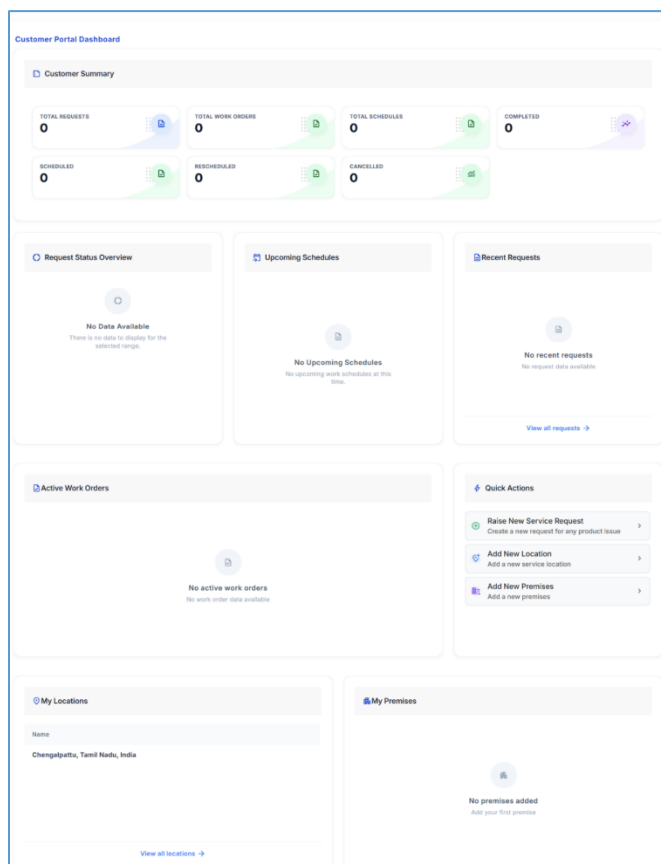
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13. Customer Portal

The **Customer Portal** provides customers with a self-service interface to manage service requests, monitor work orders, view schedules, and access important information related to their products, locations, and service history. It offers real-time visibility into service activities while reducing dependency on customer support teams.

13.1 Dashboard



Customer Portal → Dashboard

Overview

The Customer Dashboard provides a comprehensive overview of the customer's service activities, work orders, schedules, and locations. It serves as the landing page after customer login, displaying key performance indicators, recent activities, upcoming schedules, and quick actions.

Customer Summary

The dashboard displays a summary of service statistics, including:

Widget	Description
Total Requests	Total number of service requests raised by the customer.
Total Work Orders	Total work orders created for customer requests.
Total Schedules	Total scheduled service visits.
Completed	Successfully completed work orders or schedules.
Scheduled	Upcoming scheduled service visits.
Rescheduled	Total rescheduled service visits.
Cancelled	Cancelled work orders or schedules.

Request Status Overview

Displays the current status distribution of customer service requests, providing quick visibility into:

- New Requests
- In Progress
- Scheduled
- Completed
- Cancelled

This section helps customers understand the overall progress of their service requests.

Upcoming Schedules

Shows all upcoming service appointments, including:

- Scheduled service date
- Planned visit time
- Assigned technician (if available)
- Service description
- Work order reference

Customers can easily track their upcoming maintenance and service visits.

Recent Requests

Displays the latest service requests submitted by the customer.

Each entry includes:

- Request Number
- Request Date
- Service Type
- Current Status
- Priority

Customers can navigate to the complete request history using the **View All Requests** option.

Active Work Orders

Lists all ongoing work orders that have not yet been completed.

Information displayed includes:

- Work Order Number
- Service Description
- Assigned Technician
- Current Status
- Scheduled Date
- Priority

This enables customers to monitor active service activities in real time.

Quick Actions

The dashboard provides shortcuts for frequently used customer operations:

- **Raise New Service Request** – Create a new service request for product issues or maintenance.
- **Add New Location** – Register a new customer service location.

- **Add New Premises** – Add a new building, branch, or premises under the customer account.

These actions simplify common customer tasks and improve self-service efficiency.

My Locations

Displays all customer service locations registered in the system.

Each location includes:

- Location Name
- City/State
- Country

Customers can view the complete list using the **View All Locations** option.

My Premises

Displays customer premises associated with service locations, such as:

- Buildings
- Offices
- Plants
- Branches
- Facilities

Customers can manage premises information directly from the portal.

13.2 Add Service Request

The screenshot shows a web interface for adding a service request. At the top, there's a header bar with the title 'Requests' and a sub-header 'Requests / Add Request'. A '< Back' button is in the top right corner. Below the header, the main form is titled 'Add Request'. It features a tabbed interface with 'Execution Type' selected, containing 'Service' and 'Product' tabs. The 'Service' tab is active, showing three dropdown menus: 'Service Category*', 'Service Type*', and 'Requested Service*'. Below these is a 'Preferred Schedule' section with radio buttons for 'Service Date' (selected) and 'Preferred Dates'. The 'Service Date' section includes a date input field (DD-MM-YYYY) and a 'Preferred Time' dropdown. A 'Request Notes' text area is below. The 'Additional Details' section at the bottom includes 'Customer Address*' (with a dropdown and a '+' icon), 'Priority*' (dropdown), and 'Due Date' (date input field). 'Cancel' and 'Save' buttons are at the bottom right.

Navigation

Customer Portal → Requests → Add Request

Overview

The **Add Request** feature enables customers to raise new service requests directly through the Customer Portal. Customers can request preventive maintenance, breakdown service, installation, inspection, or other available services by selecting the required service details and preferred schedule.

The request is automatically routed to the service team for review, scheduling, and work order creation.

Execution Type

Customers can create requests for either:

- **Service** – Raise a service request for maintenance, repair, inspection, installation, or support.
- **Product** – Raise a request related to a specific installed product or equipment.

Service Information

The customer specifies the service required.

Field	Description
Service Category	Select the service category.
Service Type	Select the type of service.
Requested Service	Select the specific service to be performed.

Preferred Schedule

Customers can indicate their preferred service schedule.

Scheduling Options

- **Service Date** – Select a single preferred service date.
- **Preferred Dates** – Provide multiple preferred dates for scheduling flexibility.

Additional scheduling information includes:

Field	Description
Service Date	Preferred service date.
Preferred Time	Preferred time slot for service.
Request Notes	Additional information or problem description.

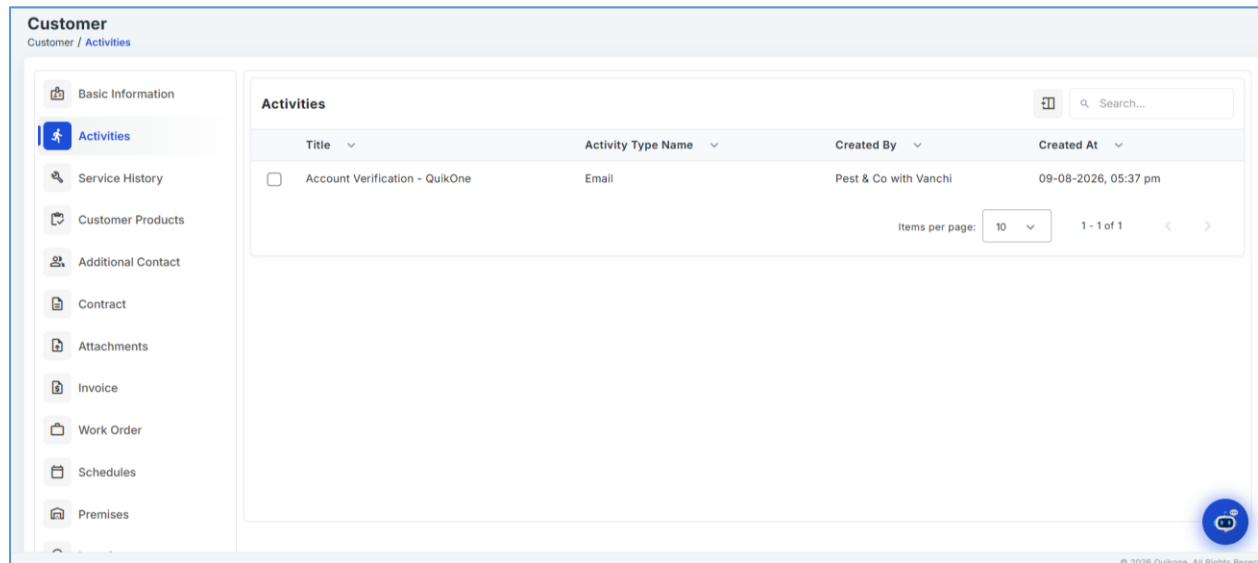
Additional Details

Customers can provide further information to help the service team.

Field	Description
Customer Address	Service location where the work is required.

Priority	Priority level of the request.
Due Date	Requested completion date, if applicable.

13.3 Customer Profile



Overview

The **Customer Profile** provides a comprehensive 360-degree view of customer information and all associated service activities. It acts as a centralized repository for customer records, allowing service teams to manage customer details, contracts, service history, assets, financial transactions, work orders, schedules, and related documents from a single location.

The profile helps customer service representatives, dispatchers, and managers quickly access complete customer information throughout the service lifecycle.

Customer Profile Sections

Basic Information

Displays the customer's primary information, including:

- Customer Name
- Company Name
- Customer Code

- Contact Information
- Email Address
- Billing Address
- Service Address
- Customer Type
- Branch
- Business Unit
- Status

Activities

The **Activities** section maintains a chronological log of all interactions with the customer.

Each activity records:

- Activity Title
- Activity Type (Email, Call, Meeting, SMS, etc.)
- Created By
- Created Date & Time

This provides a complete communication history for customer relationship management.

Service History

Displays the customer's historical service records, including:

- Completed Work Orders
- Previous Service Requests
- Maintenance Visits
- Repairs
- Installation History
- Service Reports
- Technician Notes

This helps technicians understand previous issues and services performed.

Customer Products

Lists all products or equipment registered under the customer.

Typical information includes:

- Product Name
- Model Number
- Serial Number
- Installation Date
- Warranty Status
- AMC/CMC Coverage
- Product Status
- Service History

Additional Contacts

Allows multiple contact persons to be maintained for a customer.

Examples include:

- Facility Manager
- Site Supervisor
- Maintenance Manager
- Finance Contact
- Purchase Department
- Emergency Contact

Each contact can have separate phone numbers, email addresses, and designations.

Contracts

Displays all service contracts associated with the customer.

Supported contract types include:

- AMC (Annual Maintenance Contract)
- CMC (Comprehensive Maintenance Contract)
- Warranty Contracts
- Service Agreements

The contract information includes contract duration, validity, coverage, utilization, and renewal status.

Attachments

Stores customer-related documents such as:

- Contracts
- Agreements
- Purchase Orders
- Site Drawings
- Equipment Manuals
- Certificates
- Images
- Other supporting documents

Invoice

Displays all invoices issued to the customer, including:

- Proforma Invoices
- Tax Invoices
- Outstanding Invoices
- Paid Invoices
- Credit Notes
- Payment Status

Work Orders

Shows all work orders created for the customer.

Typical information includes:

- Work Order Number
- Service Type
- Status
- Priority
- Assigned Technician
- Scheduled Date
- Completion Date

Schedules

Displays all scheduled service visits for the customer, including:

- Upcoming Visits
- Completed Visits
- Rescheduled Visits
- Cancelled Visits
- Preventive Maintenance Schedules

Premises

Maintains multiple service locations or premises belonging to the customer.

Each premise can contain:

- Address
- Building Details
- Floor Information
- Site Contact
- Installed Products
- Associated Work Orders