



## Self Service Center/Customer Portal User Guide

An all-inclusive database that efficiently tracks service history, equipment history, quotes, work orders, and invoices. The SSC Customer Portal also allows you to instantly submit service requests to your Service Provider.

### **Self Service Center Location:**

Using your web browser, browse to the URL: <https://customer.sageserviceops.com/>

### **Access:**

Your login information will be emailed to you when the Administrator sets up your account. Use the appropriate email address and password to log into the Self Service Center. If you forget your password, please select *Forgot your Password?* and follow the instructions.

### **How To Request Service:**

Once you are logged in and on your Home Page, select the tab at the top of the page which reads Request Service.



### Location Filter

Home

- **Location** - Using the drop down menu, select the appropriate site location which requires service.

**Location: \***

**Requested By:**

\*

- **Requested By** - Your name will automatically appear in this field. You may change the name if necessary.



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- **Problem** - Using the drop down menu, select the appropriate issue.

<b>Problem: *</b>	-Select- ▼
<b>Permission</b>	-Select-
<b>Code:</b>	Concrete Raising
	Fire Alarm - Inspection
	Fire Alarm - Service
	HVAC
	No Heat
<b>PO #:</b>	Piping Project
	Sprinkler - Inspection
	Sprinkler - Service
<b>Priority:</b>	Supression - Service
	Water Leak

- **Purchase Order** - If your company requires a purchase order to track this service call, please use this field.
- **Priority** - Select the most appropriate priority level for the service required.

<b>Priority:</b>	Normal ▼
<b>Please explain the re</b>	Urgent
	High
	Normal
	Low
	At our Convenience

200 characters remaining

- **Reason for Request** - To keep your Service Provider well informed, use this field as an opportunity to briefly elaborate on a reason for the service request.



Please explain the reason for your request:\*

170 characters remaining

Fire alarms need to be checked

- **Equipment** - Based on the issue at hand, if you know which specific piece of equipment needs to be serviced, select it accordingly.

Equipment:

Duct Smoke Detector - Bryant Air Conditioning-BA

Add Content:

Furnace - Bryant Air Conditioning-HUI9876 -2 nd floor

Duct Smoke Detector - Bryant Air Conditioning-BAC 3284979-897 -office

- **Add Content** - If your Admin company has enabled the ability to upload attachments, you can use the 'Choose File' button to browse your computer/device, provide it with a Title and include it in the Service Request

Add Content:

Choose File No file chosen

Title:\*

### **SUBMIT Request**

Be sure all of the required fields are entered, then go ahead and submit your Request. Once Submitted, you will see a confirmation notice in RED at the top of the page. This notice will also confirm the Work Order number that has been applied to the request, for your reference.



The screenshot shows the 'Service Requests' page. At the top, there are navigation tabs: Home, Request Service, Service Requests (highlighted), and Equipment. On the left is a 'Request Filter' section with search and dropdown menus for Location and Status. The main content area is titled 'Service Requests' and contains a notification: 'Service Request has been submitted. The work order number is:23539'. Below the notification is a table with the following data:

WO#	Location	Description	Status	Problem	PO#	Request Date
23539	Jack's Discount	Fire alarms need to be...	Open	Fire Alarm - Service	--	Jan 27, 2017

### **CANCEL Request**

Service requests can NOT be canceled through the web portal. Please call your service provider directly to cancel a request

### **Service Requests:**

Once a request is submitted to your Service Provider, it is then assigned a Work Order number. ALL work orders will be saved in the Service Requests section of SSC. The Service Requests tab is located at the top of the page. Upon selecting this tab, you will see that the Top 20 Requests will appear in chronological order, with the most recent requests listed at the top.

This screenshot is similar to the first one but highlights the 'Service Requests' tab in the navigation bar and the 'Service Requests' title in the main content area. An 'Excel Export' button is visible below the table.

### **Search**

Using the Request Filter, on the Left side of the screen, you can search for a specific Service Request. You can search by Work Order number, Location, Status, Priority, Days Requested Ago, and Date Range.

Once you have found what you are searching for, you can click on the Work Order number to view additional detailed information about the request.



## Request Filter

Search

Location

Status

Priority

Problem

Days Requested Ago

Date Range

Start Date

End Date

### **Equipment:**

The Equipment tab is located at the top of the page. Upon selecting this tab, you will see that the Top Items will appear in chronological order, with the most recent items pertaining to the most recent Service Requests listed first. Overall, this is a list of installed assets at any/all location(s) that may be serviced from time to time. Examples of equipment are generators, HVAC units, sprinkler systems, and roofing systems.



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Installed At	Type	Manufacturer	Model Number	Serial Number	Location
2nd floor	Furnace	BruntAir Conditioning	BRN676	—	Jack's Discount
office	Coil Smoke Detector	BruntAir Conditioning	BAC-524675-452	25824950842	Jack's Discount

## Search

Using the Equipment Filter, on the Left side of the screen, you can search for a specific piece of equipment, as to find out what Location(s) and Work Order(s) are associated with it. You can search by

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Keyword, Location, and Type. Once you have found what you are searching for, you can click on any link in the Installed At column to view additional detailed information about the equipment history.

## Equipment Filter

Search

Location

All

Type

All Types

 Search

## Invoices, Quotes & Other Content:

Additional information associated with all Site Locations, such as invoices, quotes, and other content, is available using the Location Filter.



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[Home](#)   [Request Service](#)   [Service Requests](#)   [Equipment](#)

## Location Filter

Jack's Discount Center (1)

## Jack's Discount | JACKS

313 North Roosevelt  
Portland OR

[Service Requests](#)   [Request Service](#)   [Assets/Equipment](#)

### Recent Site Activity

#### Invoices:

Invoice #	Invoice Date	Sale Amount	Total	Customer PO
#4529	Jul 20, 2016	\$300.00	\$300.00	--
#4528	Jul 20, 2016	\$300.00	\$300.00	--
#4526	Nov 28, 2015	\$300.00	\$300.00	--
#4519	Sep 24, 2015	\$300.00	\$300.00	--
#4522	Sep 14, 2015	\$300.00	\$300.00	--

#### Service Reports:

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#### Quotes:

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#### Other Content:

--

### Location Filter:

On your Home Page, there is a sidebar on the Left side of the screen which reads, Location Filter. Go ahead and click on your business name and a drop down menu of Locations will appear.



## Location Filter

Jack's Discount Center (1)

Jack's Discount  
JACKS  
313 North Roosevelt  
Portland, OR



You can now see all of the Recent Site Activity, which includes, Invoices, Service Reports, Quotes, and other content that is related to that specific Service Location.

You can view detailed information by clicking on a specific Invoice number, Work Order number, Quote number or Content description.