



## Customer Response Center

- Portal -

michael.scott@dundermifflin.com

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# Customer Portal User Guide





# Customer Portal User Guide

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# Customer Portal User Guide

## YOUR DASHBOARD

Create a new work order

View your most recent 30 days of work orders.

Shows the support hardware & software contract status based on the location chosen in the dropdown.

Ticket Categories based on selected option in the drop down.

Dashboard + Create work order

MOST RECENT WORK ORDERS (PAST 30 DAYS) CHECK ALL WORK ORDERS

Show 10 entries Search:

DATE	STATUS	WORKORDER#	SEV	STORE	ADDRESS	PROBLEM/REMARK	TECH TRACKING
Jan/12/2021 01:32 PM	Pending	02013236	a	ABC123	101 - 123 Fourth Street	Problem with the thing	
Jan/10/2021 07:08 PM	Closed	02013213		ABC123	101 - 123 Fourth Street	The fax machine is not working.	
Jan/08/2021 11:06 AM	Open	02013209		Hansol Bubble World HQ Testing	1210 Cameron Stttt	system does not work. store down	
Jan/08/2021 10:07 AM	Open	02013210	1	ABC123	101 - 123 Fourth Street	this is a testing workorder	
Jan/08/2021 08:27 AM	Open	02013208		ABC123	101 - 123 Fourth Street	Unknown SW testing workorder	
Jan/07/2021 08:33 AM	Canceled	02013206	a	ABC123	101 - 123 Fourth Street	Software Issue Software Problem (with the software)	
Jan/04/2021 10:41 AM	Closed	01191259	a	FARM BOY - LESLIEVILLE	1015 LAKE SHORE BLVD EAST	per Josie(fb hd) lane 3 cashier screen is black. tried soft rebooting lane but still not	
Dec/31/2020 08:58 AM	Billed	01190140	a	FARM BOY - RIDEAU	50 RIDEAU STREET #102	per Michelle(fb hd) receipt printer on cash #2 is having issues.	
Dec/15/2020 08:46 AM	Billed	01184045	a	FARM BOY - HARVARD SQ HAMILTON	801 MOHAWK ROAD WEST	per Colleen(fb hd) lane #9 has a scanner error on it. remote reboot did not fix the is	
Dec/15/2020 08:34 AM	Open	01184041	a	FARM BOY - RIDEAU	50 RIDEAU STREET #102	per Colleen(fb hd) trouble with debit and credit balance	

Showing 1 to 10 of 11 entries

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Contract Summary Dunder Mifflin, Scranton #1

**Dunder Mifflin Paper Co.**  
50 RIDEAU STREET #102, OTTAWA, K1N 9J7, Ontario

Contract Support Coverage:

**Software:** Monday-Sunday: 12:00AM-11:59PM  
Statutory Holiday: No Coverage (Expiry date April 30, 2023)

**Hardware:** Monday-Sunday: 12:00AM-11:59PM  
Statutory Holiday: No Coverage (Expiry date April 30, 2023)

# of Work Orders TODAY <b>1</b> Date: Jan 12, 2021	# of Work Orders THIS WEEK <b>1</b> Date: Jan 11, 2021 ~ Jan 17, 2021	# of Work Orders LAST WEEK <b>6</b> Date: Jan 04, 2021 ~ Jan 10, 2021
# of Work Orders THIS MONTH <b>7</b> Date: Jan 01, 2021 ~ Jan 12, 2021	# of Work Orders LAST MONTH <b>14</b> Date: Dec 01, 2020 ~ Dec 31, 2020	# of Work Orders TOTAL WO <b>291</b>

Severity Chart

Total

Total

Today

This Week

Last Week

This Month

Last Month

Uncategorized 225

● Uncategorized ● Severity 1 ● Severity 2 ● Severity 3 ● Severity 4

Severity Chart- 2021

8

6

4

2

0

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

A view of the year of tickets with severity level break down.

Tickets categorized by: Today, This Week, Last Week, This Month, Last Month & the Work Order Total

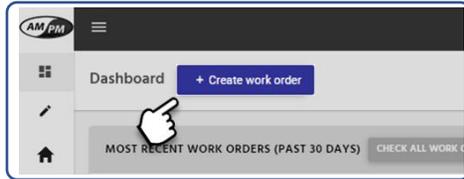
A view of the year of tickets with severity level break down.



# Customer Portal User Guide

## HOW TO CREATE A WORK ORDER

1. From the dashboard click on “+ Create work order”



2. Fill in the form data within the pop-up window.

- What location is the service call relating too?
  - Click the dropdown “Select Store” and choose the location.
- Who can we contact to resolve the issue?
  - Fill in the contact information:
    - Contact Name
    - Contact Phone
    - Contact Email
  - Fill in the alternate contact information if a secondary individual can be reached.
- What problems are you needing assistance with?
  - Click the dropdown “Select issue”
  - Write a detailed description explaining the problems you are facing.
- Would you like to receive updates on the status of your work order?
  - Check the box

Upload any pictures or files that you may feel will help assist our service technicians with resolving the issue by uploading it to the work order.

**\*Click Submit when finished\***

**Create Work Order**

\* Select location  
Select store

\* Store Contact      \* Store Phone      Store Email  
Contact Name      Contact Phone      Contact Email  
(999) 999-9999

Alternative Contact (Optional)      Alternative Phone (Optional)      Alternative Email (Optional)  
Contact Name      Alternative Contact Phone      Alternative Contact Email  
(999) 999-9999

\* Select Product Issue  
Select issue

\* Describe your issue (0/200 Maximum letter)

I would like to receive a notification email when work order status is changed.  
(Recipient email is current login email)

Attachment file  
Maximum 3 number of files, all files together must have maximal 9MB's and the file's extensions should be [jpg', 'png', 'gif', 'jpeg', 'pdf']

Choose files To Upload      **Choose Files**

Close      **Submit**



# Customer Portal User Guide

## ATTACHING FILES TO A WORK ORDER

- (1) While creating or when re-opening a work order, click on “Choose Files” at the bottom of the form.

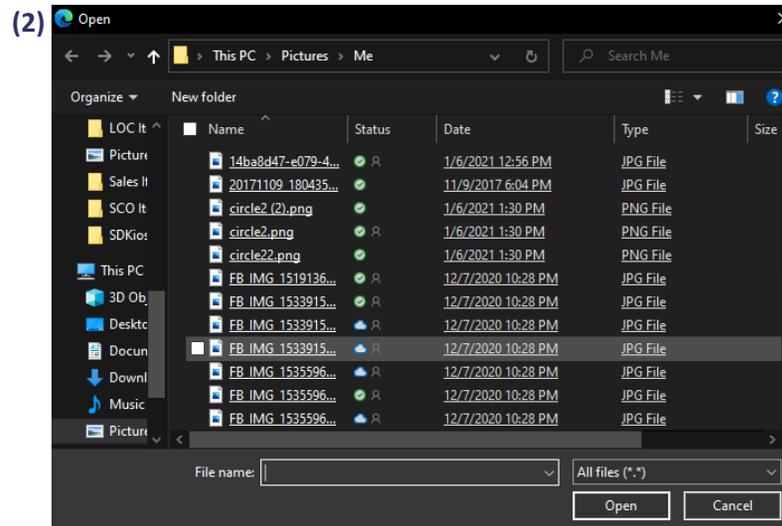
### Attachment file

Maximum 3 number of files, all files together must have maximal 9MB's and the file's extensions should be [jpg', 'png', 'gif', 'jpeg', 'pdf']



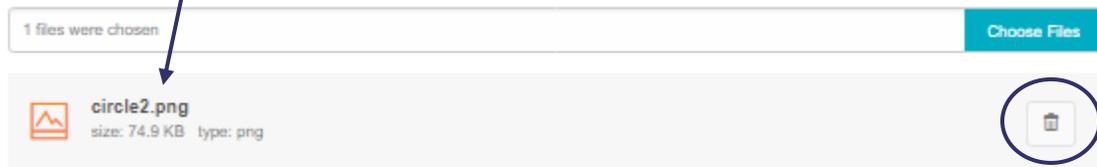
- (2) This will open a window in which you can select the files to associate with the work order.

Once you select the file the window will close, and you will see your file listed within the work order form.



### Attachment file

Maximum 3 number of files, all files together must have maximal 9MB's and the file's extensions should be [jpg', 'png', 'gif', 'jpeg', 'pdf']



Do not worry if you accidentally selected the incorrect file just hit the “Trash Can” and choose the correct one!



# Customer Portal User Guide

## HOW TO GET TO YOUR WORK ORDERS

Users can see their most recent past 30 days of work orders directly from the Dashboard.

MOST RECENT WORK ORDERS (PAST 30 DAYS) [CHECK ALL WORK ORDERS](#)

Show 10 entries Search:

DATE	STATUS	WORKORDER#	SEV	STORE	ADDRESS	PROBLEM/REMARK	TECH TRACKING
Jan/12/2021 01:32 PM	Pending	02013236	3	ABC123	101 -123 Fourth Street	Problem with the thing	<input type="checkbox"/>
Jan/10/2021 07:08 PM	Closed	02013213		ABC123	101 -123 Fourth Street	The fax machine is not working.	<input type="checkbox"/>
Jan/08/2021 11:06 AM	Open	02013209		Hansol Bubble World HQ Testing	1210 Cameron Stttt	system does not work. store down	<input type="checkbox"/>
Jan/08/2021 10:07 AM	Open	02013210	1	ABC123	101 -123 Fourth Street	this is a testing workorder	<input type="checkbox"/>
Jan/08/2021 08:27 AM	Open	02013208		ABC123	101 -123 Fourth Street	Unknown SW testing workorder	<input type="checkbox"/>
Jan/07/2021 08:33 AM	Canceled	02013206	3	ABC123	101 -123 Fourth Street	Software Issue Software Problem (with the software)	<input type="checkbox"/>
Jan/04/2021 10:41 AM	Closed	01191259	3	FARM BOY - LESLIEVILLE	1015 LAKE SHORE BLVD EAST	per Josie(fb hd) lane 3 cashier screen is black, tried soft rebooting lane but still nothing.	<input type="checkbox"/>
Dec/31/2020 08:58 AM	Billed	01190140	3	FARM BOY - RIDEAU	50 RIDEAU STREET #102	per Michelle(fb hd) receipt printer on cash #2 is having issues.	<input type="checkbox"/>
Dec/15/2020 08:46 AM	Billed	01184045	3	FARM BOY - HARVARD SQ HAMILTON	801 MOHAWK ROAD WEST	per Colleen(fb hd) lane #9 has a scanner error on it, remote reboot did not fix the issue.	<input type="checkbox"/>
Dec/15/2020 08:34 AM	Open	01184041	3	FARM BOY - RIDEAU	50 RIDEAU STREET #102	per Colleen(fb hd) trouble with debit and credit balance	<input type="checkbox"/>

Showing 1 to 10 of 11 entries Previous 1 2 Next

### NAVIGATION

- Dashboard
- Work Orders
- Store
- User Management
- Notification Setup

OR

View and Search for work orders by clicking on the Work Orders tab on the navigation panel.



# Customer Portal User Guide

## SEARCHING FOR WORK ORDERS

**Search for a work order by number**

**Search for a work order based on the status that it is**

**Search for a work order by date range**

Work Orders [+ Create work order](#)

**Filter**  
9 stores selected

Search Workorder#...   Select All WorkOrder Status

01/01/2021  To  Date: To

Show 10 entries

DATE	STATUS	WORKORDER#	SEV	STORE	ADDRESS	PROBLEM/REMARK	TECH TRACKING
Jan/12/2021 01:32 PM	Pending	02013236	3	ABC123	101 - 123 Fourth Street		
Jan/10/2021 07:08 PM	Closed	02013213		ABC123	101 - 123 Fourth Street		
Jan/08/2021 10:07 AM	Open	02013210	1	ABC123	101 - 123 Fourth Street		
Jan/08/2021 11:06 AM	Open	02013209		Hansol Bubble World HQ Testing	1210 Cameron Stttt	system does not work. store down	
Jan/08/2021 08:27 AM	Open	02013208		ABC123	101 - 123 Fourth Street	Unknown SW testing workorder	
Jan/07/2021 08:33 AM	Canceled	02013206	3	ABC123	101 - 123 Fourth Street	Software Issue Software Problem (with the software)	
Jan/04/2021 10:41 AM	Closed	01191259	3	FARM BOY - LESLIEVILLE	1015 LAKE SHORE BLVD EAST	per josie(fb hd) lane 3 cashier screen is black, tried soft rebooting lane but still nothing.	

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# Customer Portal User Guide

## VIEWING WORK ORDERS

You can view a work order by clicking the Work Order #, or the magnifying glass.

DATE	STATUS	WORKORDER#	SEV	STORE	ADDRESS	PROBLEM/REMARK	TECH TRACKING
Jan/10/2021 07:08 PM	Open	02093313		Dunder Mifflin Paper Co.	1725 Slough Ave, Scranton	Unknown HW The fax machine is not working.	

After selecting the work order you will be taken to a detailed view of all the information and work associated with it.

← All Work Orders

initiated sev 2 WO# 01190140 History Notification ON Respond Work Order

**Issue**

Created: December 31/2020 08:58 AM

Customer: Dunder Mifflin Paper Co.

Account #: RR2161

Store Name: Dunder Mifflin Paper Co.

Store Location: 1725 Slough Ave, Scranton, PA 18506, United States

Software:

Email: Dwight.Schrute@DunderMifflin.com

Contact: Dwight Schrute III Phone: (123) 333-3233

Alternative Contact: Michael Scott Alternative Phone: (513) 244-1033

Sales representative:

**Remarks**

NAME/DATE	CONTENT	FILE NAME
MANDANA (Dec/31/2020 08:58 AM)	per Michelle(fb hd) receipt printer on cash #2 is having issues.	
Ali Karami (Dec/31/2020 09:12 AM)	Called. The printer has a problem with giving out the paper. They have to open up the lid to be able to get the receipt. They want to change the Receipt printer. Sending to HW.	
Abdullah Bakr (Jan/02/2021 06:47 AM)	— Task 2 is completed — frequent paper jam, replaced and tok	

Showing 1 to 3 of 3 entries

**Task**

STATUS	SOFTWARE	TECHNICIAN	DISPATCH TIME	ARRIVAL TIME	COMPLETED TIME
Completed	LOC SMS	Ali Karami	12/31/2020 12:05:00 PM	12/31/2020 12:05:00 PM	12/31/2020 12:12:00 PM
Completed		Abdullah Bakr	1/2/2021 9:07:00 AM	1/2/2021 9:39:00 AM	1/2/2021 9:47:00 AM



# Customer Portal User Guide

## WORK ORDER VIEW OPTIONS

← All Work Orders

Billed SEV 3 WO# 01190140

History Notification ON Reopen Work Order

View a history of your work orders associated with the location that the current ticket is associated with.

Work Order History

Show 10 entries

DATE	STATUS	WORKORDER#	SEVERITY	STORE	ADDRESS	PROBLEM/REMARK
Dec 15 2020 08:44 AM	Open	01194041	3	RUM-BOY-ROGOU	21 RIDEAU ST 2ND FLOOR	per Colleen To hd trouble with debt and credit balance
Dec 02 2020 06:45 PM	Open	01193126	3	RUM-BOY-ROGOU	21 RIDEAU ST 2ND FLOOR	per Colleen HD suggested some issue forwarding email to you
Aug 21 2020 02:17 AM	Billed	01191021		RUM-BOY-ROGOU	21 RIDEAU ST 2ND FLOOR	per Maggie (Friday) to store manager computer went down, built new one. Take 2016 off original computer and put it on new computer.
Jul 02 2020 02:14 AM	Billed	01190376		RUM-BOY-ROGOU	21 RIDEAU ST 2ND FLOOR	per RUM-BOY HD Cash 3 is having item scan issues, says item not found.
Jun 29 2020 10:24 PM	Billed	01191305		RUM-BOY-ROGOU	21 RIDEAU ST 2ND FLOOR	per Colleen To hd lane 5 terminal needs to be replaced.
Jun 29 2020 07:11 AM	Billed	01191025		RUM-BOY-ROGOU	21 RIDEAU ST 2ND FLOOR	Per Michelle (FR HD) - a vendor solution entered at a higher price than an item is, proposing pos to give change to the customer 2017 - replacing screen and this needs to be fixed.
Jun 29 2020 02:42 AM	Billed	01190390		RUM-BOY-ROGOU	21 RIDEAU ST 2ND FLOOR	Per Michelle (FR HD) - lane 2 and 3 only have one screen for customer to view weights on the catalog screen and lanes are normally equipped with 2 screen - 2017 - replacing terminal and needs this seen to.
Jun 20 2020 12:42 PM	Billed	01191700		RUM-BOY-ROGOU	21 RIDEAU ST 2ND FLOOR	per Maggie To hd lane 5 cashier monitor is really faint, want tech to replace dynamic store is closed, wants back out tomorrow morning.
Jun 19 2020 11:44 AM	Billed	01190236		RUM-BOY-ROGOU	21 RIDEAU ST 2ND FLOOR	per Michelle (FR HD) Cash 3 screen is too bright and Cash 2 screen is too dim.
Jun 19 2020 10:05 AM	Billed	01190276		RUM-BOY-ROGOU	21 RIDEAU ST 2ND FLOOR	per Maggie To hd lane 5 monitors went turn on, both new power but are blank.

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Close

Turn Notifications ON or OFF

Click to Re-open the current work order.

Create Work Order

**Dunder Mifflin Paper Co.**  
50 RIDEAU STREET #102, OTTAWA, K1N 9J7, Ontario.

\* Store Contact: CATHLENE  
\* Store Phone: 6132441033 (999) 999-9999  
Store Email: Contact Email

Alternative Contact (Optional): CATHLENE  
Alternative Phone (Optional): 6132441033 (999) 999-9999  
Alternative Email (Optional): Alternative Contact Email

\* Select Product Issue: Select issue

\* Describe your issue (0/2000 Maximum letters)

I would like to receive a notification email when work order status is changed. (Recipient email is current login email)

Attachment file  
Maximum 3 number of files, all files together must have maximal 9MB's and the file's extensions should be [jpg, png, gif, jpeg, pdf]

Choose Files to Upload

Close Submit



# Customer Portal User Guide

## WORK ORDER VIEW OPTIONS

Below reflects the location and the contact information for the work order.

The Remarks Section reflects content relating to work and your comments associated with the work order.

Issue

Created December/31/2020 08:58 AM

Customer Dunder Mifflin Paper Co.

Account # B34181

Store Name Dunder Mifflin Paper Co.

Store Location 1725 Slough Ave.  
Scranton, PA 18506  
United States

Software

Email Dwight.Schrute@DunderMifflin.com

Contact Dwight Schrute III Phone (444) 222-3344

Alternative Contact Michael Scott Alternative Phone (444) 222-3344

(444) 222-3344

Sales representative

### Remarks

NAME/DATE	CONTENT	FILE NAME
<b>MANDANA</b> (Dec/31/2020 08:58 AM)	per Michelle(fb hd) receipt printer on cash #2 is having issues.	
<b>Ali Karami</b> (Dec/31/2020 09:12 AM)	Called. The printer has a problem with giving out the paper. They have to open up the lid to be able to get the receipt. They want to change the Receipt printer. Sending to HW.	
<b>Abdullah Bakr</b> (Jan/02/2021 06:47 AM)	-- Task 2 is completed -- frequent paper jam. replaced and tok	

Showing 1 to 3 of 3 entries

The Task Section lists all the technicians associated with the work order and the status of the areas that they have/are working on.

### Task

STATUS	SOFTWARE	TECHNICIAN	DISPATCH TIME	ARRIVAL TIME	COMPLETED TIME
Completed	LOC SMS	Ali Karami	12/31/2020 12:05:00 PM	12/31/2020 12:05:00 PM	12/31/2020 12:12:00 PM
Completed		Abdullah Bakr	1/2/2021 9:07:00 AM	1/2/2021 9:39:00 AM	1/2/2021 9:47:00 AM



# Customer Portal User Guide

## ADDING USERS TO THE PORTAL

Start by clicking on the “User Management” Tab (1), followed by “+ Create user” (2)

NAME	EMAIL	ASSIGNED STORES	ACTION
Brent Krause	Brent.Krause@ampmservice.com	<input type="checkbox"/> Assigned Stores	<input type="button" value="Delete User"/>
Dale Hrbachek	Dale.Hrbachek@ampmservice.com	<input type="checkbox"/> Assigned Stores	<input type="button" value="Delete User"/>
Dave Nation	Dave.Nation@ampmservice.com	<input type="checkbox"/> Assigned Stores	<input type="button" value="Delete User"/>

Fill in the username and the email address of the user that is being added.

Search for the locations that need to be assigned to the user or scroll through the list and mark the boxes next to the locations.

\* User Name  \* Email

\* Customers/Stores

Search name / city / province

Total 0 stores selected

STORE NAME	ADDRESS	CITY	PROVINCE/STATE	<input type="checkbox"/>
Dunder Mifflin - HQ	3269 New York Ave.	New York	New York	<input type="checkbox"/>
Dunder Mifflin - Scranton	1725 Slough Ave.	Scranton	Penslvania	<input type="checkbox"/>
Dunder Mifflin - Stamford	6269 Shrute Road.	Stamford	Connecticut	<input type="checkbox"/>
Dunder Mifflin - Akron	1231 Nard Dog Lane	Akron	Ohio	<input type="checkbox"/>
Dunder Mifflin - Buffalo	1122 Pams Place	Buffalo	New York	<input type="checkbox"/>



# Customer Portal User Guide

## SETTING UP EMAIL NOTIFICATIONS

From the Navigation list, click on the “Notification Setup” Tab.

NAVIGATION

- Dashboard
- Work Orders
- Store
- User Management
- Notification Setup**

### Notification

#### Notification Store List [+ Add Store](#)

I would like to get all the notification email from listed store below.

NAME	ADDRESS	CITY	PROVINCE (STATE)	DELETE
No stores have notification setup				

Next Click on the “+ Add Store”

This will bring up a list of the locations in which you can choose to receive notifications from.

Check the boxes next to the locations and click Save.

#### Add notification store

Search name / address / city / province   Total 0 stores selected

Empty string search will show whole store list.

STORE NAME	ADDRESS	CITY	PROVINCE/STATE	<input type="checkbox"/>
Dunder Mifflin - HQ	3269 New York Ave.	New York	New York	<input type="checkbox"/>
Dunder Mifflin - Scranton	1725 Slough Ave.	Scranton	Pensylvania	<input type="checkbox"/>
Dunder Mifflin - Stamford	6269 Shrute Road.	Stamford	Connecticut	<input type="checkbox"/>
Dunder Mifflin - Akron	1231 Nard Dog Lane	Akron	Ohio	<input type="checkbox"/>
Dunder Mifflin - Buffalo	1122 Pams Place	Buffalo	New York	<input type="checkbox"/>

#### Notification Store List [+ Add Store](#)

I would like to get all the notification email from listed store below.

NAME	ADDRESS	CITY	PROVINCE (STATE)	DELETE
Dunder Mifflin - Scranton	1725 Slough Ave.	Scranton	Pensylvania	<input type="button" value="Delete store in notification list"/>