



# Customer Self-Service Portal Set-up Guide

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# Customer Self-Service Portal Setup Guide

## Prerequisites

The set-up procedure outlined in this document is based on a standard installation of Miracle Service™ software and a typical Microsoft® computer system environment.

See full System Requirements here:

<http://www.miracleservice.com/product-features/system-requirements/>

## Configure Customer Access in Miracle Service

Your Miracle Service customers must be configured in order to give them access to your Customer Web Portal. In order to configure your customers, run the Miracle Service Client application. For each customer that you want to allow access:

- Check the 'Web Active' checkbox on their customer record.
- Assign them a Web Password (see the diagram below).

The screenshot shows the 'Customer Maintenance' window in the Miracle Service application. The window title is 'Miracle Service - [Customers]'. The main title bar says 'Customer Maintenance'. Below the title bar, there is a 'Customer ID' dropdown menu set to 'CMR001'. The customer name is 'County Medical Records'. The form contains several sections: 'Active?' with a checked checkbox; 'Vertical Market' set to 'Government Customer'; 'Address' field with '54687 Jefferson Avenue'; 'City' set to 'Anytown', 'State' set to 'AS', and 'Country' set to 'USA'; 'Phone' and 'Fax' fields with area codes '(555) 984-5643' and '(555) 984-2157' respectively; 'Region' set to 'Mou1'; 'Sales Person' field; 'Email' field; 'Attention' set to 'IT Department'; and 'Company Name' set to 'County Medical Records'. A red box highlights the 'Web Active' checkbox (which is unchecked) and the 'Web Password' field. At the bottom of the form, there are buttons for 'New Customer', 'Edit Customer', 'Delete Customer', 'Reports', and 'Print Statement'. The status bar at the bottom shows 'Form View' and 'NUM'.

The customer will then log in to the Customer Self Service Portal using the **Customer ID** and **Web Password**.

# Installation

**New Customers:** If you have paid for installation of the Customer Self Service Portal, then Nexent will do the installation for you when Miracle Service is installed. Please contact your Miracle Service Implementation Coordinator for scheduling.

**Current Customers:** If you are upgrading from a previous Customer Web Portal installation will be done automatically when running the '**MSWeb Installer**' during your Miracle Service upgrade.

## Login to the Customer Portal Administration Area

Login with the User Name "WebAdmin" and the password provided to you at installation.

The login path will be: **http://xxxxx.xxxxxxx/MSWeb/#/login**, where the X's represent your external IP address or DNS.

For Upgrading Customers Only - When upgrading from a previous v8 (or earlier) Customer Web Portal, your new login path will be as follows:

Old Login: <http://xxxxx.xxxxxxx/miracleservice/customerportal/Login.asp>

New Login: <http://xxxxx.xxxxxxx/MSWeb/#/login>

**\*We recommend that you change the default WebAdmin password** by going to the main Miracle Service Administration application tab 13. Administration > Security > Logins, and double-click on the WebAdmin login to change the password.

Welcome

User Name: \*

WebAdmin

Password: \*

.....

Login

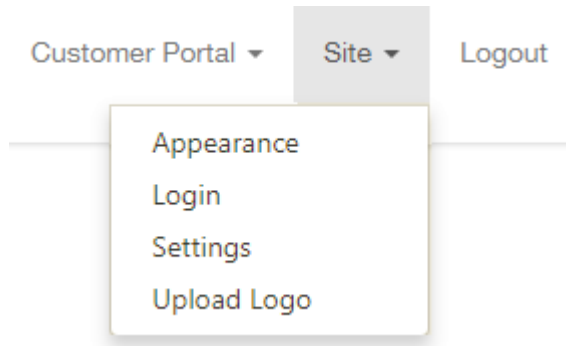
Forgot your password or need assistance? [Click Here](#)

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Simplified Service Management

# Site Menu Settings

From the menu bar located in the top-right area of your screen, select the "Site" menu.



## Site / Login

From the "Site" menu option, select "Login".

### 1. Login Page Banner:

This is the greeting message that will appear on top of the Login page.

Note: Individual customer logins are set-up in the **Miracle Service Client Application**. From the Main Tab on a customer's record, check the "Web Active" box and assign them a password. Their Customer ID will automatically become their user name.

### 2. Login Failure Text:

This is the message that will appear if the user attempts to login with an invalid user name and password.

*What the customer sees:*

A screenshot of a customer login page. At the top left is a logo for "generic logo company" with a blue circle icon. A red box highlights this logo, labeled "8. Logo Image". Below the logo is a "Welcome" message in a white box with a red border, labeled "1. Login Page Banner". The login form includes a "User Name: \*" field with the text "ABC0017", a "Password: \*" field with three dots, and a green "Login" button. Below the button is a link: "Forgot your password or need assistance? [Click Here](#)". At the bottom, a red error message box with a white 'X' icon contains the text "The specified user name or password is invalid.", labeled "2. Login Failure Text". The footer contains "© 2017 - Nexent Innovations Inc - Version 8.5.2.0" on the left and "Powered By: **MIRACLESERVICE** Simplified Service Management" on the right.

### 3. Assistance Form Banner:

If a user has clicked on the link on the login screen for assistance with a lost password, this is the heading that will appear at the top of the pop-up login assistance form.

### 4. Assistance Form Content:

If a user has clicked on the link on the login screen for assistance with a lost password, this is the content that will appear on login assistance form.

### 5. Login Assistance Field 1 \*Mandatory field:

This is the first field that the user will have to complete when requesting assistance for a lost/forgotten password. As this field is mandatory for the user, reserve this for most important information that you are requesting from the user.

### 6. Login Assistance Field 2-5:

These are additional fields that you would like the user to complete when requesting assistance for a lost/forgotten password.

*What the customer sees:*

The screenshot shows a 'Login Assistance' form for 'generic logo company'. The form is titled 'Login Assistance' and contains the following elements:

- 3. Assistance Form Banner:** A red box highlights the title 'Login Assistance'.
- 4. Assistance Form Content:** A red box highlights the message: 'Sorry you are having trouble accessing the portal. Please provide the following information so we can help you out.'
- 5. Login Assistance Field 1:** A red box highlights the first input field, labeled 'Enter your Email: \*'.
- 6. Login Assistance Fields 2-5:** A red box highlights the remaining three input fields, labeled 'Enter your Company Name:', 'Enter your User Name:', and an unlabeled field.

At the bottom right of the form are 'Close' and 'Submit' buttons. The footer of the page reads '© 2017 - Nexent Innovations Inc - Version 8.5.2.0' and 'MIRACLE'.

# Site / Appearance

From the "Site" menu option, select "Appearance".

## 7. Theme Name

The Customer Portal comes with several color theme options for you to choose from. The default theme is Blue, however if preferred, you can select an alternate theme which better matches your company branding. As you are currently logged in, you will need to press F5 on your browser to refresh your screen to see the new theme reflected.

## Logo Image

Shows file name of the current logo file. Changing your logo is done through the Site / Upload Logo menu option.

## Date & Time Formats

Select from the drop-down options to set how the date and time should appear.

## Currency Symbol

Select from the drop-down options to set the currency symbol for your company.

*What the customer sees:*

The screenshot shows a customer portal homepage. At the top left is a logo for "generic logo company" with a blue circle icon, enclosed in a red box labeled "8. Logo Image". To the right is a navigation menu with links: Home, Jobs, Equipment, Orders, Library, and My Account. Below the navigation is a search bar with the text "How can we assist you today?". Underneath the search bar is a row of five buttons: "New Job" (with a pencil icon), "Place Order" (with a shopping cart icon), "Update Readings" (with a calculator icon), "View Jobs" (with a list icon), and "View Orders" (with a truck icon). This row of buttons is enclosed in a red box. A red line points from the "View Orders" button to a label "7. Theme Color". Below the buttons is a heading "ABC Inc. is pleased to be your full-service company!" followed by a subtitle "This (heading 4) subtitle appears in the theme color." and a paragraph of text: "Use the short-cut buttons above or choose from the full menu options to submit and review jobs, as well as to view and print your completed documents." Below this is another paragraph: "For all other services please contact us and we would be happy to assist you." At the bottom left are contact details: "Tel: 567-555-1212" and "service@ourwebsite.com".

## Site / Upload Logo

From the "Site" menu option, select "Upload Logo".

### 8. Logo image

Upload your company logo image. Size should not exceed 330px (wide) x 85px (high).


## Site / Settings

From the "Site" menu option, select "Settings".

### Site Configuration

**External URL Link:** This is the link that points to your external domain. Typically this is the external IP address or DNS. Example: http://externalIP

#### Site Configuration

External URL Link 

http://externalIP


### Event Notifications

**Test Email Account:** Enter an email account to receive a test email to confirm that your SMTP settings in Miracle Service are set-up correctly. Click the "Send Test" button.

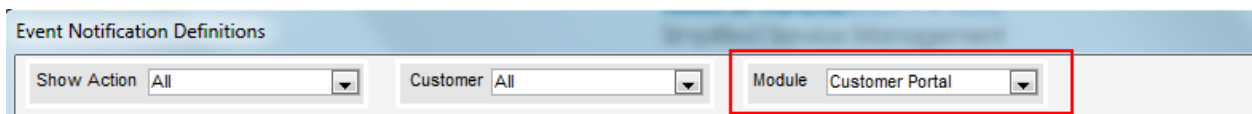
#### Event Notifications

Test Email Account

test@company.com

 Send Test

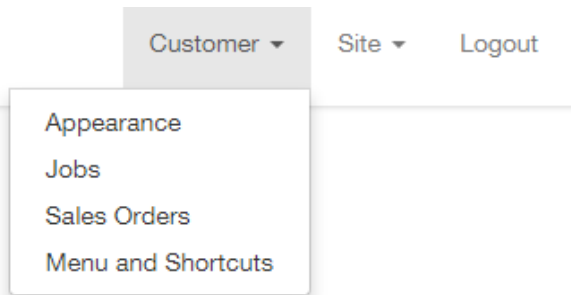
**Setting-Up Events:** The actual email events (example: new job confirmation, new order email etc.) are set-up in **Miracle Service Administration**. Go to tab 14. Event Manager. Use the 'Module' drop-down menu and select 'Customer Portal' to view and personalize the email events. You will need to change the default email (youremail@company.com) to your company's email which you confirmed is working during the 'Test Email Account' step above.





# Customer Menu Settings

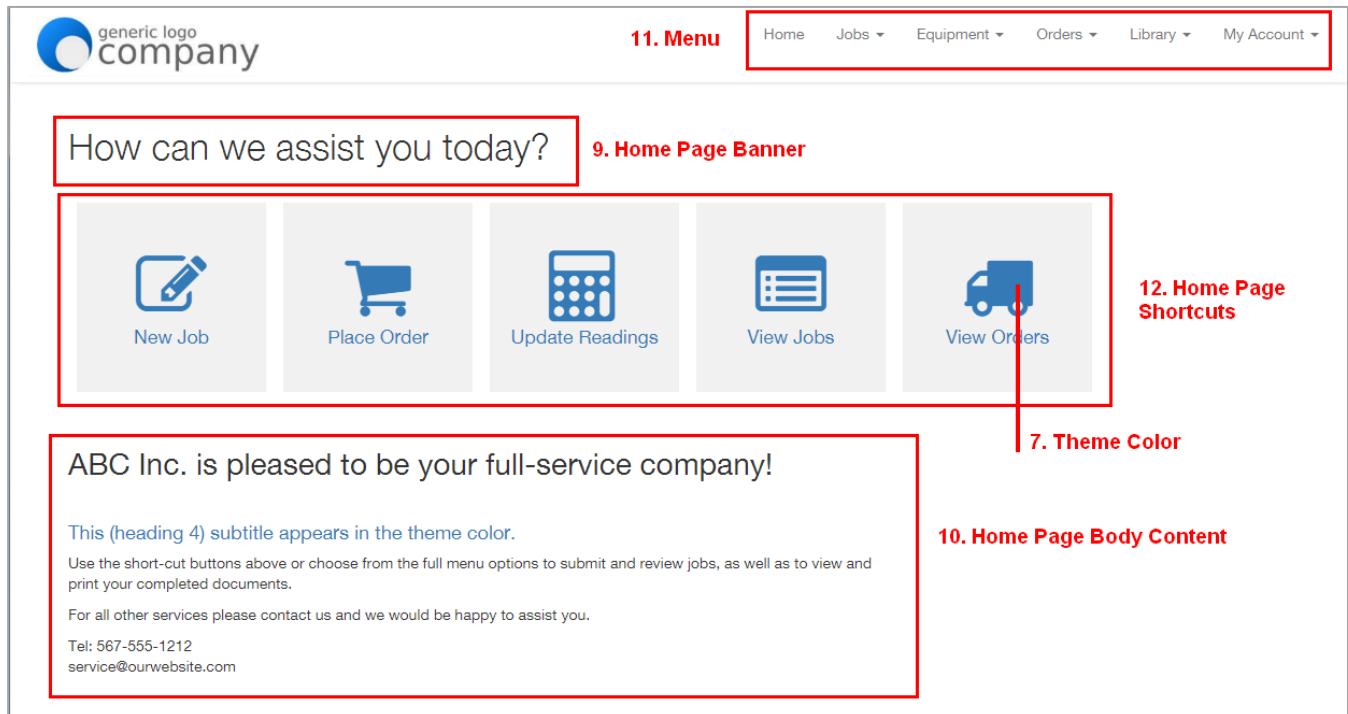
From the menu bar located in the top-right area of your screen, select the "Customer" menu.



## Customer / Appearance

From the "Customer" menu option, select "Appearance".

*What the customer sees:*



### 9. Home Page Banner Content

This is the heading that will appear on the top of the home page, which the user will see after logging in. You can use the formatting options available to format this heading.

### 10. Home Page Body Content

This wording will appear below the Menu Shortcut buttons on the home page. It can be used for company announcements, promotional messaging, instructions or more. Formatting options as well as HTML tags can be used to format this content.

## Customer / Menu and Shortcuts

From the "Customer" menu option, select "Menu and Shortcuts".

### 11. Show Menu

Check off the menu items that you would like to make available to users of this portal. If a menu item is unchecked then it will not be visible to the user.

### 12. Include Shortcut & Shortcut Captions

Shortcuts will appear as buttons on the home page (*see screen shot on previous page*). They are designed as quick links to the most popular menu areas of the portal. It is recommended that 3-5 shortcuts are selected. The shortcut buttons will appear in the theme color.

Use the 'Shortcut Caption' fields to change the caption which will appear on each shortcut button.

## Customer / Jobs

From the "Customer" menu option, select "Jobs".

**View Job History:** Check off if you would like the user to be able to see their job history. Leave unchecked to show only Open jobs.

### 14. Default Job Type

Set the default Work Order type that will be associated with all new job requests created through the Customer Portal. This can be changed for each individual job from within Miracle Service to reflect the actual type.

### 15. Description Field Label

This is for the description field into which users will enter the description of their issue. The information entered into this (mandatory) field by the user will become the Task Description for the new job.

### 16. Add additional fields for New Job Request

Optional: if you wish to add additional data entry fields (in addition to the description field) to enter a new job request, you would set them up here. The field labels and contents of these additional fields will be merged together with the description field to form one 'Task Description' for this job in Miracle Service.

### 17. New Job Screen Message

This message will appear at the top of the screen when entering a new job request. Include any instructions that you wish to provide to the user for entering a new job.

What the customer sees:

The screenshot shows a 'New Job Request' form with the following fields and annotations:

- 17. New Job Screen Message:** A red box highlights the instruction 'Please provide us with as many details as possible.' at the top left of the form.
- Customer: \***: A dropdown menu.
- Equipment:** A search field with the placeholder text 'Search by Serial Number, Unit ID, Description, Model or Location'.
- Contract:** A dropdown menu with 'Select...'.
- PO Number:** A text input field.
- Requester:** A dropdown menu with 'Select...'.
- 15. Description Field Label:** A red box highlights the label 'Please describe your issue: \*' and the corresponding text input field.
- 16. Optional: Add additional fields for New Job Request:** A red box highlights the 'Add New' link below the description field.
- Buttons: 'Close' and 'Create' are located at the bottom right.

### 18. Confirmation Popup Content:

After a new job has been submitted, the user will be presented with this message on a pop-up screen to confirm that the new job was created. Using the |TASKNUM| data field will display the task number for the new job.

The screenshot shows a 'Confirmation' popup with the following content:

- Job Number: 0001673-1**: A blue link.
- 18. Confirmation Popup Content:** A red box highlights the message 'Thank you! We will be in touch to schedule your service.'
- OK**: A button at the bottom.

### 19. Email Confirmations and Notifications

These settings are for setting up automatic emails to notify the customer, as well as the appropriate departments within your company, that a new job has been created.

## Customer / Sales Orders

From the "Customer" menu option, select "Sales Orders".

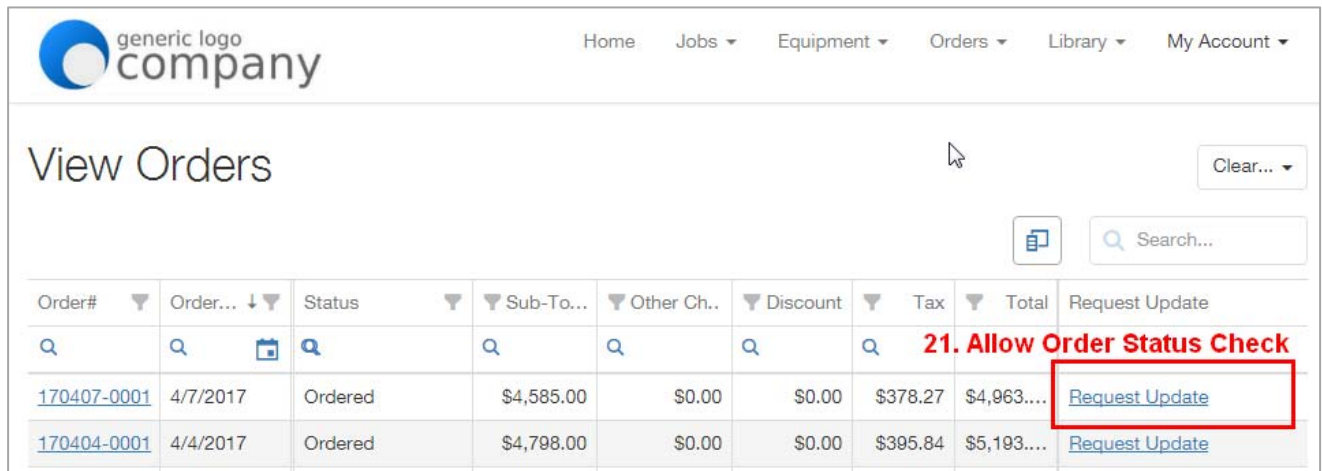
### 20. Display only in-stock items

This displays items on the 'Place and Order' screen only if the Quantity In stock is greater than 0. If the Stock level is zero, the item will not display in the customer portal. If you want to show items even if there is no stock, leave this unchecked.

## 21. Allow order status check

If checked, this will provide the user with the option to request an update status on their order. A 'check status' button will be visible on the View Orders screen, which when clicked, will send an automated email to your company to let you know they would like an update on their order. If you do not want this option available to your customers leave this unchecked.

What the customer sees:



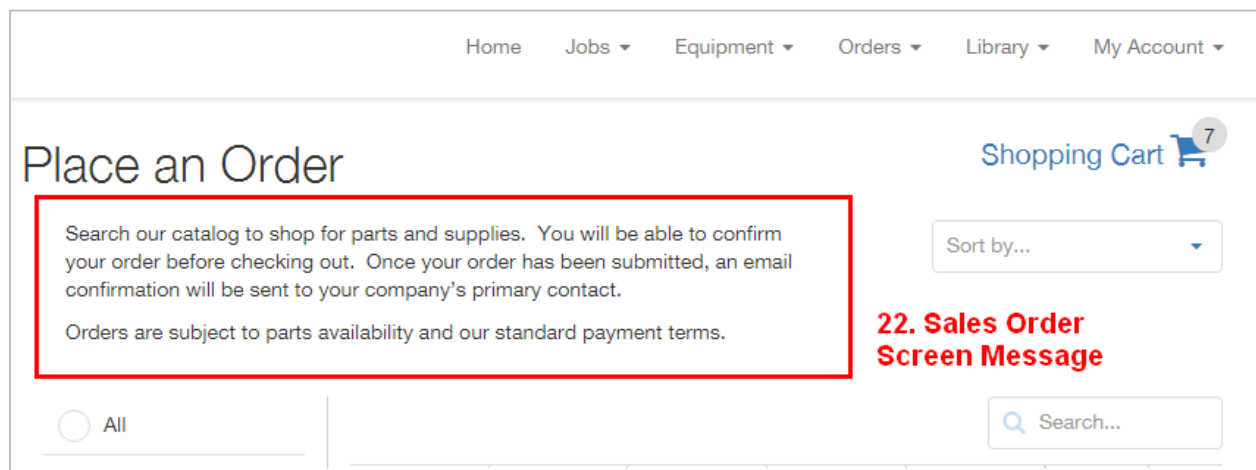
The screenshot shows the 'View Orders' page for 'generic logo company'. The page includes a navigation bar with links for Home, Jobs, Equipment, Orders, Library, and My Account. Below the navigation bar, the page title 'View Orders' is displayed. A search bar and a 'Clear...' button are visible. A table of orders is shown with columns for Order#, Order Date, Status, Sub-Total, Other Charges, Discount, Tax, Total, and Request Update. The 'Request Update' column contains a 'Request Update' button for each order. A red box highlights the 'Request Update' button for the order with ID 170407-0001. A red text label '21. Allow Order Status Check' is placed over the table.

Order#	Order...	Status	Sub-To...	Other Ch..	Discount	Tax	Total	Request Update
<a href="#">170407-0001</a>	4/7/2017	Ordered	\$4,585.00	\$0.00	\$0.00	\$378.27	\$4,963....	<a href="#">Request Update</a>
<a href="#">170404-0001</a>	4/4/2017	Ordered	\$4,798.00	\$0.00	\$0.00	\$395.84	\$5,193....	<a href="#">Request Update</a>

## 22. Sales Order Screen Message

This message will appear at the top of the 'Place an Order' screen when creating a new order. Any instructions that you wish to provide to the user for creating the order should be included here.

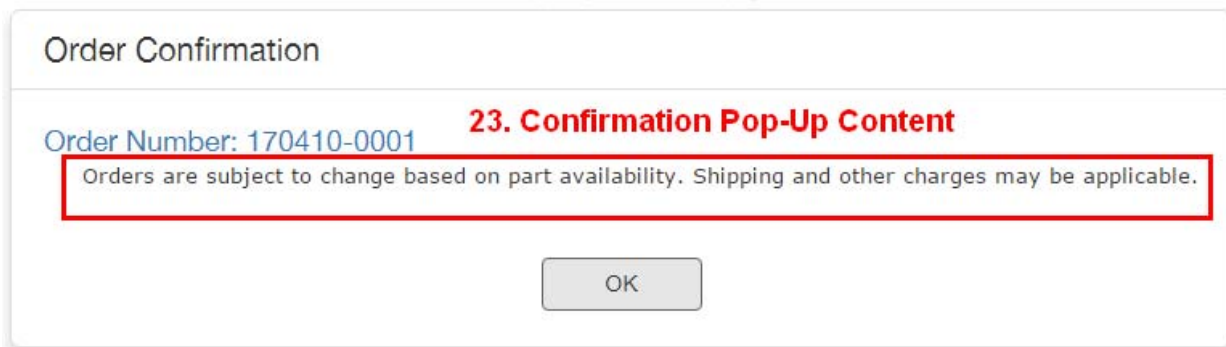
What the customer sees:



The screenshot shows the 'Place an Order' page for 'generic logo company'. The page includes a navigation bar with links for Home, Jobs, Equipment, Orders, Library, and My Account. Below the navigation bar, the page title 'Place an Order' is displayed. A 'Shopping Cart' icon with a '7' badge is visible. A message box is highlighted with a red border, containing the text: 'Search our catalog to shop for parts and supplies. You will be able to confirm your order before checking out. Once your order has been submitted, an email confirmation will be sent to your company's primary contact. Orders are subject to parts availability and our standard payment terms.' A 'Sort by...' dropdown menu and a search bar are also visible. A red text label '22. Sales Order Screen Message' is placed over the message box.

### 23. Confirmation Popup Content

This is the message that is displayed to the user once a new order has been submitted.



### 24. Email Confirmations and Notifications

These settings are for setting up automatic emails to notify the customer, as well as the appropriate departments within your company, that a new order has been created.