



VMS PORTAL – VENDOR SERVICE MANAGER CONSOLE USER GUIDE

Standard Edition – V0.1

Confidential

Table of Contents

1	Vendor Management System (VMS).....	2
1.1	Intended Audience	3
2	Getting Started	4
2.1	Manage User	6
2.2	Adding User(s)	8
2.3	Editing User Details	10
2.4	Inactivate User.....	10
2.5	Reset Password.....	11
2.6	Activate User	12

1 Vendor Management System (VMS)

ServiceO portal designed to manage customer-specific requirements. It combines best in class solutions providing partners/vendors the ability to submit, track, and manage service cases online.

The System is capable of meeting customer-specific requirements for reliability, responsiveness, agility and cost. It also features industry-specific functionality allowing you to identify and keep track of customer assets throughout your network of global facilities.

VMS Portal Features:

The Serviceo portal provides our Vendors with the ability to submit, track, and manage service cases online.

Serviceo (VMS) supports following key features:

	Menu	Sub Menu	Features Supported
1			
2			
3			
4			
5			

1.1 Intended Audience

This document is primarily intended for the Vendor users only. The information contained in this manual is intended to be used only by the authorized members with proper rights and privileges.

2 Getting Started

In this section, you will find instructions and other information useful for evaluating the Serviceo (VMS) and getting to know it when you are starting out.

Program Setup: Portal User Login Credentials

Please contact your Account Administrator (Site Manager) for Login information:

Portal Login Information	
PMS Vendor/Partner Portal URL:	https://. Google Chrome (recommended)
Login Information	
Login (Email):	<i>Your email address</i>
Account Name:	<i>Your company's account name</i>
Account ID:	<i>Your company's account ID</i>
Password:	<i>Your password</i>
Web2Case Login Information (Please use this option in case if you are unable to access Portal)	
Web2Case Portal URL:	http://
Login Information	
IRON Service Global Account Name:	<i>Your company's account name</i>
IRON Service Global Account ID:	<i>Your company's account ID</i>
Program Reference Code:	<i>Program Code</i>

To access the **VMS** menus, the user you log on as must have rights to run the module. If you want access to the **VMS** and the System will not allow you to log on, contact your System Administrator to verify that your user name has been granted appropriate rights.

1. Log into to the Serviceo portal.

The *Login* page is displayed as shown in Figure 2.1.

Figure 2.1: Login page

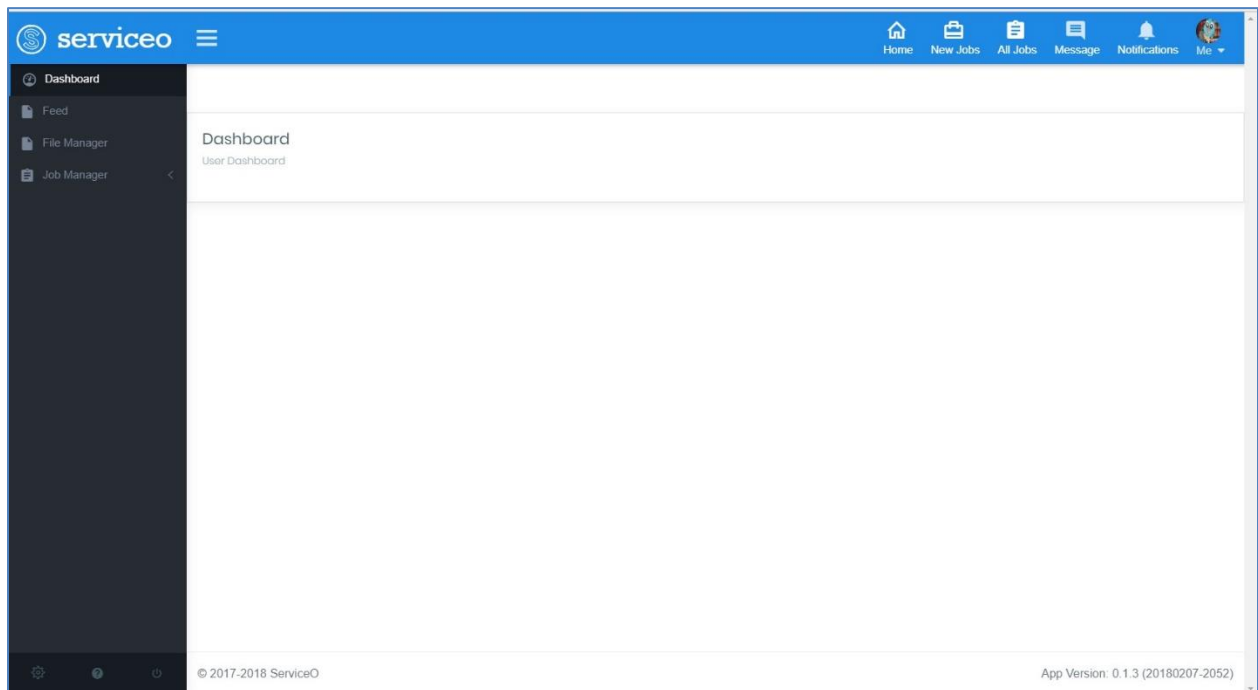


Tip: Select the **Remember me** check box to store your credentials in the cookies and enables you to sign back automatically if you close the site without logout. Click the **Forgot password?** to reset your password. You will be taken to the *Reset* screen where you need to enter your Email and then click **Reset** button. The instructions to reset password will be sent to the entered Email.

2. Type your correct Email in the **Email** field.
3. Type your password in the **Password** field and then click the **LOG IN** button to access home page.

The *VMS home* page is displayed as shown in Figure 2.2.

Figure 2.2: PMS home page



Note: The VMS Home page displays the **User Name** icon on the top right corner of the screen. It also displays icons, including **Home**, **New Jobs**, **All Jobs**, **Message**, and **Notification**.

Tip: By clicking the **User Name** icon, user can:

- View and Edit Profile Setting
- Access Inbox
- **Manage User** - (if the user has admin rights)
- Logout

2.1 Manage User

In the Serviceo, user type 'Case Dispatch Lead' is a designated Administrator with privileges to manage users by default. An Admin has special access/rights to create any number of user accounts in the Serviceo. The Manage User module makes it easier for administrator to configure users.

Specifically, an administrator can:

- Add new user
- Edit existing users
- Activate/Deactivate existing users
- Reset password

Here, each person using the Serviceco is known as a user. When a new user is added, Email Id of that user must be unique (It can't be the same as any other user name in the system even associated with different Account)

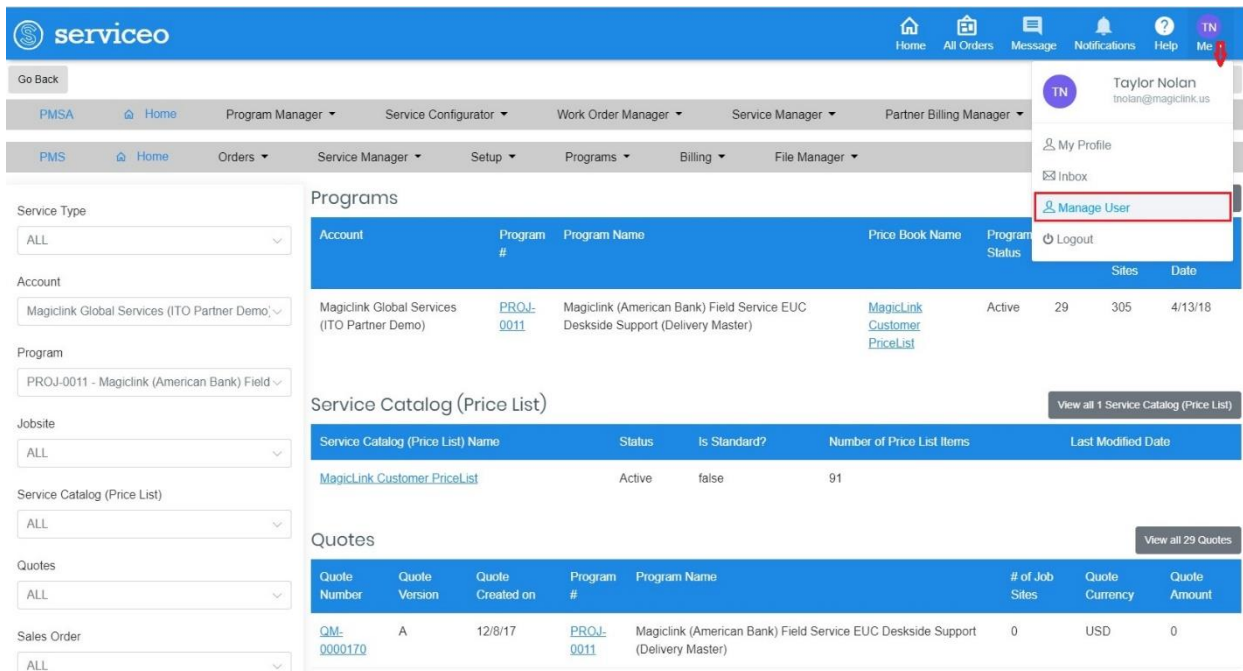
If the User Name (Email Id) already exists in the system associated with any Account, the system displays a message telling that the Email Id already exists.

Manage User module is designed to add a new user, edit user details, activate/deactivate existing users, and reset users' passwords on the request of users.

A user with the necessary rights can access the Manage User Module. In the Serviceco, only Case Dispatch Lead user type has rights to configure users.

To access Manage User module, perform the following steps:

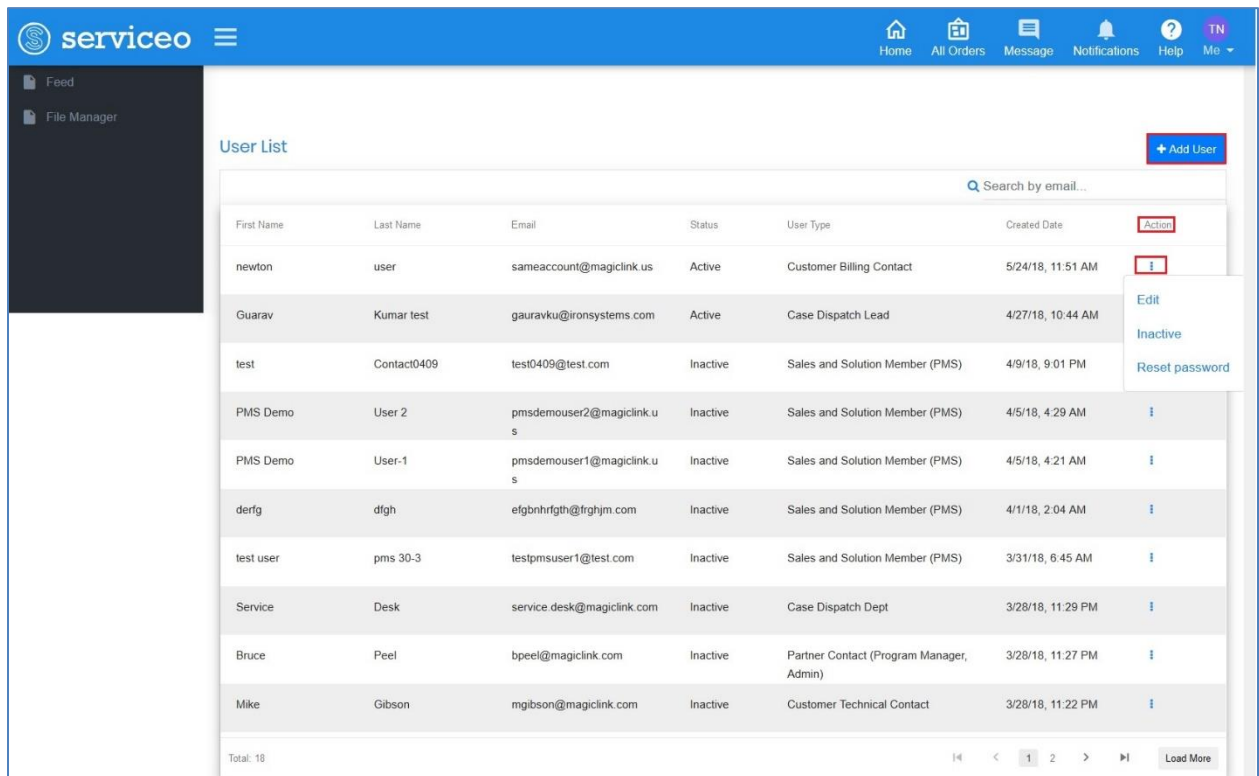
The *PMS home page* is displayed as shown below:



1. Click the **Logged User** icon in the top right corner of the *home page* and then click **Manage User** icon to access *Admin* page.

The *Admin* page appears as shown in Figure 2.3.

Figure 2.3: Admin page



The screenshot shows the 'serviceo' Admin page. On the left is a sidebar with 'Feed' and 'File Manager'. The top navigation bar includes 'Home', 'All Orders', 'Message', 'Notifications', 'Help', and 'Me'. The main content area is titled 'User List' and features a search bar 'Search by email...'. A table lists users with columns: First Name, Last Name, Email, Status, User Type, Created Date, and Action. An 'Add User' button is in the top right. A dropdown menu is open for the first user, showing 'Edit', 'Inactive', and 'Reset password' options.

First Name	Last Name	Email	Status	User Type	Created Date	Action
newton	user	sameaccount@magiclink.us	Active	Customer Billing Contact	5/24/18, 11:51 AM	[Dropdown Menu]
Guarav	Kumar test	gauravku@ironsystems.com	Active	Case Dispatch Lead	4/27/18, 10:44 AM	[Dropdown Menu]
test	Contact0409	test0409@test.com	Inactive	Sales and Solution Member (PMS)	4/9/18, 9:01 PM	[Dropdown Menu]
PMS Demo	User 2	pmsdemouser2@magiclink.us	Inactive	Sales and Solution Member (PMS)	4/5/18, 4:29 AM	[Dropdown Menu]
PMS Demo	User-1	pmsdemouser1@magiclink.us	Inactive	Sales and Solution Member (PMS)	4/5/18, 4:21 AM	[Dropdown Menu]
derfg	dfgh	efgbnhrfgh@frghjm.com	Inactive	Sales and Solution Member (PMS)	4/1/18, 2:04 AM	[Dropdown Menu]
test user	pms 30-3	testpmsuser1@test.com	Inactive	Sales and Solution Member (PMS)	3/31/18, 6:45 AM	[Dropdown Menu]
Service	Desk	service.desk@magiclink.com	Inactive	Case Dispatch Dept	3/28/18, 11:29 PM	[Dropdown Menu]
Bruce	Peel	bpeel@magiclink.com	Inactive	Partner Contact (Program Manager, Admin)	3/28/18, 11:27 PM	[Dropdown Menu]
Mike	Gibson	mgibson@magiclink.com	Inactive	Customer Technical Contact	3/28/18, 11:22 PM	[Dropdown Menu]

Total: 18

2.2 Adding User(s)

Here, you can add users by selecting an appropriate user type. All added users of all types will be in active state by default.

1. Click the **Add User** button on the *Admin* page to add new user into the system. Refer Figure 2.3.

A *Create new user* pop-up displays as shown below:

Create new user

First Name *

Last Name *

Email *

Password * [Generate password](#)

Confirm Password *

User Type *

☒ Send a notification to user

☒ Password reset

Save

Cancel

Note: Fields marked with an asterisk are mandatory.

2. Type the first name of user in the **First Name** field.
3. Type the last name of the user in the **Last Name** field.
4. Type the correct email address of the user in the **Email** field.

Note: The entered Email Id must be unique as it only be used to create login credential in the system.

5. Type the password for the user in the **Password** and **Confirm Password** fields, respectively or click the **Generate password** link to generate machine generated password in the fields.
6. Select the relevant user type in the **User Type** drop-down list.

Tip: You can select the **Send a notification to user** check box, if you want to send user creation notification to the respective user in the form of email.


If you want to send the password reset link to the user, select the **Password reset** check box. In this case, the user receives a password reset link and can reset default password of his/her choice.

7. Click the **Save** button to create user.

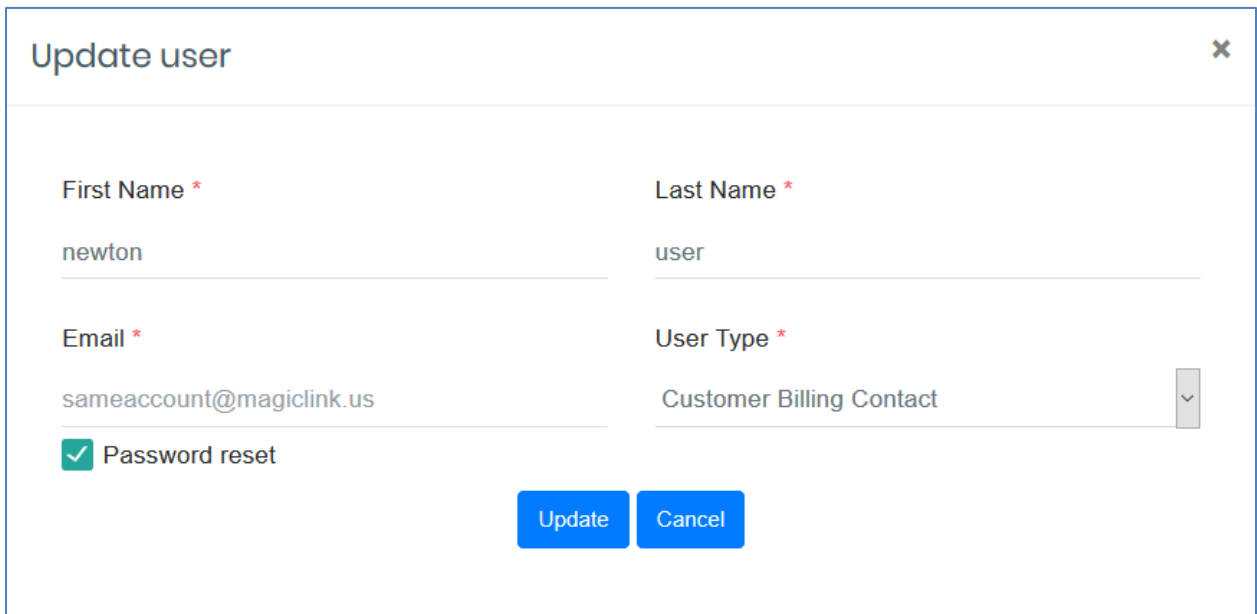
Note: The created users will appear in the **User List** on the *Admin* page. To view the added user in the User List, you need to refresh the *Admin* page.

2.3 Editing User Details

To edit user's details, perform the following steps:

1. Click the  icon in the **Action** column and then select the **Edit** option to edit the user's details. Refer Figure 2.3.

An *Update user* pop-up appears as shown below:



The 'Update user' pop-up form contains the following fields and controls:

- First Name ***: Text input field with the value 'newton'.
- Last Name ***: Text input field with the value 'user'.
- Email ***: Text input field with the value 'sameaccount@magiclink.us'.
- User Type ***: Dropdown menu.
- Customer Billing Contact**: Text input field.
- Password reset**: A checked checkbox.
- Buttons**: 'Update' and 'Cancel' buttons at the bottom right.

Note: Here, you can modify values in all fields, except Email Id of the user.

Tip: Select the **Password reset** check box to send password reset link to the user.


2. Make the changes in the fields you want to modify and then click the **Update** button to save the changes.

A message "*User update successfully!*" displays at the top of the *Admin* page and the updated user will appear in the User List.

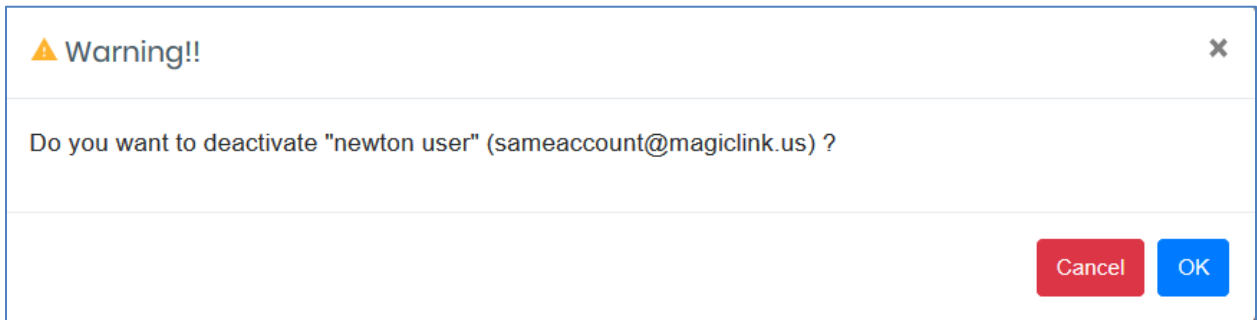
Tip: Click the **Cancel** button to close the *Update user* pop-up and cancel user's details modification.

2.4 Inactivate User

To inactivate user, perform the following steps:

1. Click the  icon in the **Action** column and then select the **Inactivate** option. Refer Figure 2.3.

A *Warning* pop-up is displayed asking if you want to deactivate user as shown below:



2. Click the **OK** button to confirm the deactivation of the user.

A message "*User newton user deactivate successfully!*" displays at the top of the *Admin* page.


Note: As you click the **OK** button, the user will be deactivated but still appears in the User List as 'Inactive' state and can be Activated in future, if required. Once a user is deactivated, it can't be edited.

Tip: Click the **Cancel** button to cancel changes.

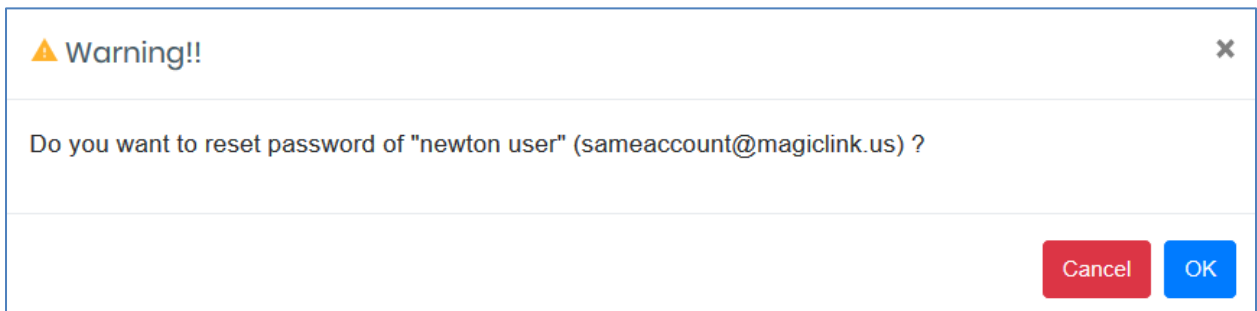
2.5 Reset Password

This option allows you to reset users' password on their request.

To reset password, perform the following steps:

1. Click the  icon in the **Action** column and then select the **Reset password** option.

A *Warning* pop-up is displayed asking if you want to reset password as shown below:



2. Click the **OK** button to confirm the reset password.


A message "*Reset password E-mail has been sent to sameaccount@magiclink.us*" at the top of the *Admin* page.

Note: Once you click the **OK** button, a password rest link is sent to respective user enabling them to change their password.

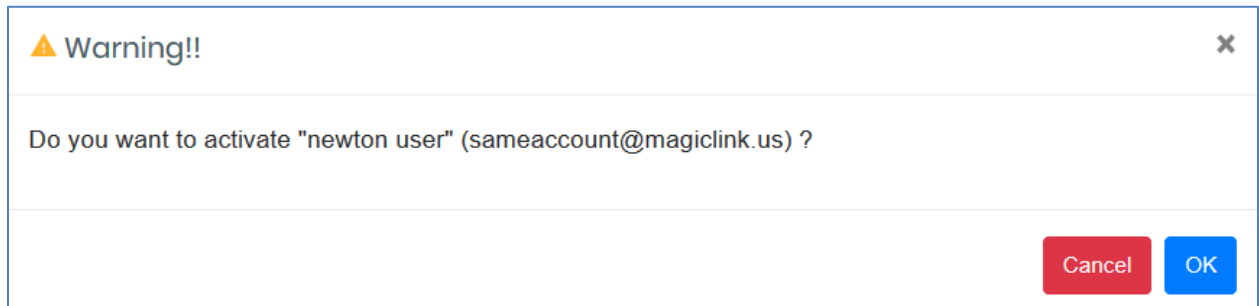
Tip: Click the **Cancel** button to cancel changes.

2.6 Activate User

To activate inactive users, perform the following steps:

1. Click the  icon in the **Action** column of the Inactive user and the select **Active** option.

A Warning pop-up is displayed asking if you want to activate this user as shown below:



2. Click **OK** button to activate the user.

Note: As you click the **OK** button, the status of this user changes as 'Active' and appears in the User List on the *Admin* page.

Tip: Click the **Cancel** button to cancel the changes.