TCR Online
Customer Portal Module
General Instructions

You will get a flashing icon on the top of your main screen that indicates you have Pending Records. This could be pending jobs and/or pending tickets. You can click on the icon or use the Customer Portal button in the lower left of your screen.

Pending Jobs

As your customers enter new jobs through the TCR Online Customer Portal application they will appear in your Pending Jobs list. Once you take action to save or reject the job, it will appear as such in the customer portal.

On the grid to the right you will be able to see who entered the job and when.

Double click on the job record to open up the Pending Job form. This will be similar to your normal job screen but you will have the Save & Accept and Reject buttons at the top.

Keep in mind that pending jobs are not part of your TCR jobs until you accept them.

All the information on the screen comes from either the job information the customer added or is the default values that you normally have on a new job.

You can change any of the information but you must change **Branch ID and Tax Code**, as those are fields not available to your customer through the portal.

Tickets: The Ticket tab allows you to review the tickets entered by the customer but you cannot change anything at this point. After you Save & Accept the job you will be able to make changes to the tickets.

Attachments: The Attachment tab allows you to review any attachments that a customer may have included when they added the job. You can review the attachment before saving the pending job.

Save & Accept: If you feel this is a valid job you can Save & Accept it. Once you press this button you will be prompted that you are sure to accept the job and it's associated tickets. You cannot accept the job and not the tickets, but you can void / edit the tickets later.

After the job is accepted it is added to TCR and given the next Job # and your normal Job screen opens up. You can at this point make further changes, open and edit tickets, etc.

Reject: If the job is not valid (i.e. a duplicate) you can Reject it. You will be prompted for a reject reason that allows you to communicate back to the user why you did not load it into TCR. This job will still appear in the customer portal for the user to see, but will have a status of Rejected instead of pending.

Pending Tickets

As your customers enter new tickets through the TCR Online Customer Portal application they will appear in your Pending Tickets list. Once you take action to save or reject the ticket, it will appear as such in the customer portal.

Pending Tickets can be associated with a new job (job# = 0) or can be new tickets to an existing job. Pending Tickets associated with a new job cannot be Accepted on their own, they must be processed with the new job.

On the grid to the right you will be able to see the type of ticket, who entered the ticket and when.

Double click on the ticket record to open up the Pending Ticket form. This will be similar to your normal ticket screen but you will have the Save & Accept and Reject buttons at the top.

Just like jobs, keep in mind that pending tickets are not part of your TCR tickets until you accept them.

All the information on the screen comes from either the ticket information the customer added or is the default values that you normally have on a new ticket.

You can change any of the information on the ticket screen.

Items: You can only review the items the user requested for the ticket. You will not be able to change anything until you accept the ticket.

Save & Accept: If you feel this is a valid ticket you can Save & Accept it. Once you press this button you will be prompted that you are sure to accept the ticket and all items associated with it.

After the ticket is accepted it is added to TCR and given the next Ticket# and your normal Ticket screen opens up. You can at this point make further changes, edit items, etc.

Reject: If the ticket is not valid you can Reject it. You will be prompted for a reject reason that allows you to communicate back to the user why you did not load it into TCR. This ticket will still appear in the customer portal for the user to see, but will have a status of Rejected instead of pending.

Portal Users

You need to setup those users who can access the TCR Online Customer Portal by entering in their information and selecting which customer records they can see and enter jobs and tickets for. Usually it is just one customer, but if you have separate divisions setup for one customer, you may have more.

From this screen you can see who is currently logged in and when each user was last logged on.

Email: This will be their unique log in.

Password: You can setup a generic password to give your customer and then have them change it during their first log in. You also will have the option to Reset their password if they forget it.

Status: The status will default to Active. If they leave the company, or you no longer want to give them access simply change it to Disabled.

First Name / Last Name: This will appear on their portal screen and on various forms / reports.

You need to Save the portal user before you can assign their User Role and the customers that they can access.

User Roles: You have the option to give the portal user Administrator or Manager access which gives them the ability to add new jobs and tickets, or Read Only that allows them to review jobs/tickets/invoice but not any new jobs/tickets.

User Customers: Once you save it you will see the section User Customers where you can Add Customers. You can also delete customer links at a later time.