The customer user's guide to Serviceprotocol.com

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Introduction

As a customer user you have the opportunity to, with your own account, log in to Serviceprotocol and keep track of your service orders, work orders, service objects and facilities. You can also send fault reports if you have the permission to do so.

The permissions for your account is decided by the company which created the account.

The document covers the following topics:

- Sign in
- Your account settings
- The customer page
- Service object
- Fault report

Chapter 1: Sign in and search

When a company has added you as a customer user, you will receive an email with your login credentials. If you want to change the assigned password, you can do so after logging in.

Note: If there is any of the information described below which you can't but wish to see, contact the company which created the account for you.
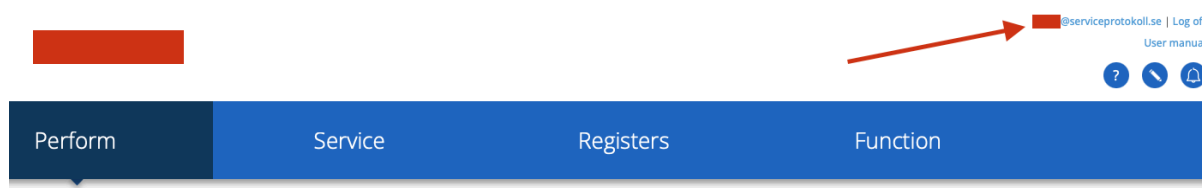
Login:
1. Go to serviceprotocol.com
2. Press the button *Sign in*
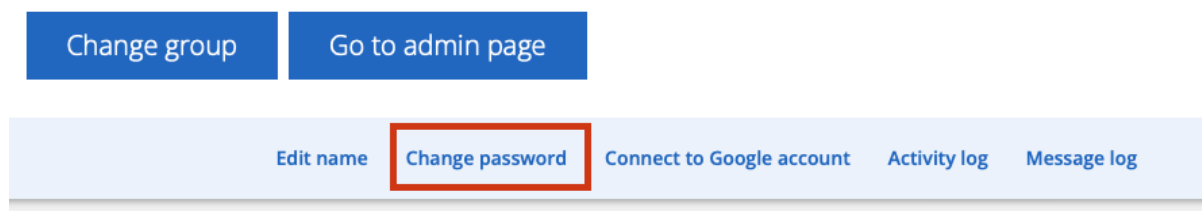   2a. You can also go directly to app.serviceprotocol.com

3. Enter your email under *Username*
4. Enter the password you received in the email
   4a. If you have forgotten the password, click on Forgotten password and follow the directions.
5. Click on *Sign in*

Change password:

1. Click on your username

2. Scroll to the bottom of the page and click on *Change Password*

3. Follow the instructions

You can change certain account settings yourself. If you have the permission to receive emails or SMS notifications when your fault report results in a work order, you need to enable this in your settings.

If you select *Send SMS on notifications*, you need to enter your mobile number.

Search
You can search for facilities, service objects and orders by clicking the respective title and using the search field. When searching, you can also use advanced filters by clicking on the blue box with a checkmark.

Chapter 2: The customer page

The first thing you see when you sign in is your customer page. Here you get an overview of all your orders, objects, facilities, etc.

If you have the necessary permissions, you can update your address and contact information. To do this, click on *Edit* at the bottom of the customer page. Don't forget to save your changes.

Under *Service orders* and *Work orders* you can click on the orders to see and read more about them. All blue text consists of links, for example, to orders.

Once inside an order, you can see what work has been performed, whether any materials have been used, and who carried out the work.

If you open an order, you can print the order or the protocol. Click on *Print* at the bottom of the page. For a service order, you first need to click on *Show protocol.*
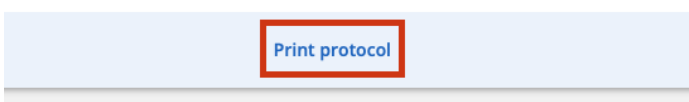
Chapter 3: Service object

On the customer page you can see your objects. To see more information, click the name of the object you wish to read more about.

At the top you can see information about the object, such as its name, serial number, previous service, next service etc. If the object is runtime-based, a **counter** is displayed.
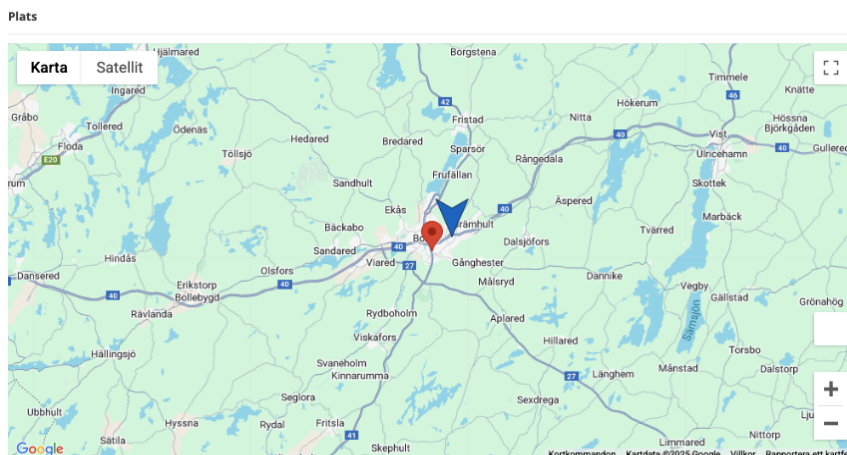

Below, we go through the information you can view regarding the service object

Location
If the facility where the object is located is marked on the map, you will see its position with a *blue* pin. The object is displayed with a *red* pin.

Parts

Here you can see the articles used for servicing this specific object, along with the amount of each article.

Parts

ARTICLE NUMBER	DESCRIPTION	AMOUNT
8	Bullens skruvar	10 st

Service orders

This displays previous services that have been performed. You can click on the blue numbers on the left to view the service report for a specific order. You can also see the status of a service, such as Invoiced.

Service orders

SO ↓	DATE	PLANNED	STATUS	SERVICE INTERVAL	SERVICE OBJECTS
7	2024-12-04		Invoiced		1
39	2025-01-03		Invoiced		1
41	2025-01-03		Invoiced		1

Work orders

Here, the work orders linked to the object are shown. Click on the blue numbers on the left to view a specific work order and read more.

Work orders

WO	DATE	CREATED	STATUS	FACILITY	SERVICE OBJECTS
153	2025-02-27	2025-02-27	Ready for invoicing	Bageriet Bullen	Bakmaskinen X2000 98765432
152	2025-02-27	2025-02-27	Ready for invoicing	Bageriet Bullen	Bakmaskinen X2000 98765432
151	2025-02-27	2025-02-27	Ready for invoicing	Bageriet Bullen	Bakmaskinen X2000 98765432

Fault report

If you've created one or more fault reports on the object, you will see them here. You can also create a new fault report by clicking the plus sign.

Fault reports

CREATED ↓	STATUS	FACILITY	SERVICE OBJECT	DESCRIPTION	ATTACHED
2025-01-30	Has no work order	Bageriet Bullen	Ugn 211101	Skruvar behöver bytas	0 files

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Sales orders

Here you can see your sales orders.

Sales orders 🔍 Search ☑

No sales orders are connected to this customer.

Documents

If the object has documents tied to it you can see them here.

Documents

This service object has no documents connected to it.

Service intervals

The object's intervals are shown here. An object can have more than one interval.

Service intervals

╋ årskontroll (365-days)

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Chapter 4: Fault report

There are several ways to create a fault report.

1. **Alternative 1:**
   a. Click on *Make fault report* on the bottom of the customer page.

   b. Enter a person of contact or select one from the dropdown list (click in the box to view the list)
   c. Select service object
   d. Add a description of the issue
   e. Save

Alternative 2:
Via the main menu, click on *Perform* then *Fault Report* and use the plus sign to create a new one.
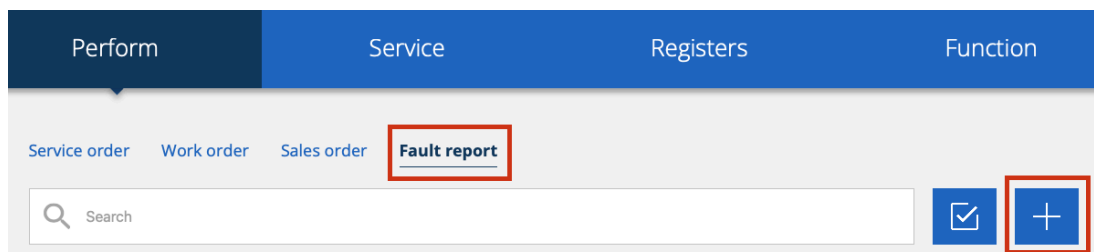
Alternative 3:
Click on the plus sign on the far right of *Fault Report* on your customer page.

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