

Your portal
Your success



Partner/Vendor Portal

User Manual (Rev. 1/2016)



Dear Vendor,

Significant changes have been made to the vendor portal January 2016.

In order to improve vendor portal performance speed additional categories/windows group the service orders in similar stages. Each of these pages will display a maximum of 25 service orders, with the ability to select the next page of 25 at the bottom of each window. This change will reduce the time loading, exporting, and importing data.

Your feedback was instrumental towards making these changes and is sincerely appreciated. The vendor portal will continue to be enhanced as needed to make it a more user friendly application.

Thank you for your support!

Very sincerely,

Your Telgian Partner

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Welcome to Telgian's vendor portal

We are excited to offer a portal to our partners that streamlines service order management. Some key benefits of the vendor portal are:

- Instant access to dispatched service orders
- A complete account of all new, accepted, in process, rejected, and complete service orders
- Ability to download and upload service order documents at any time from anywhere
- Faster issue resolution
- Streamlined work flow equates to faster payment

If there are any questions related to the vendor portal, please contact a Telgian associate at (800) 306-4122, or email resolution@telgian.com.

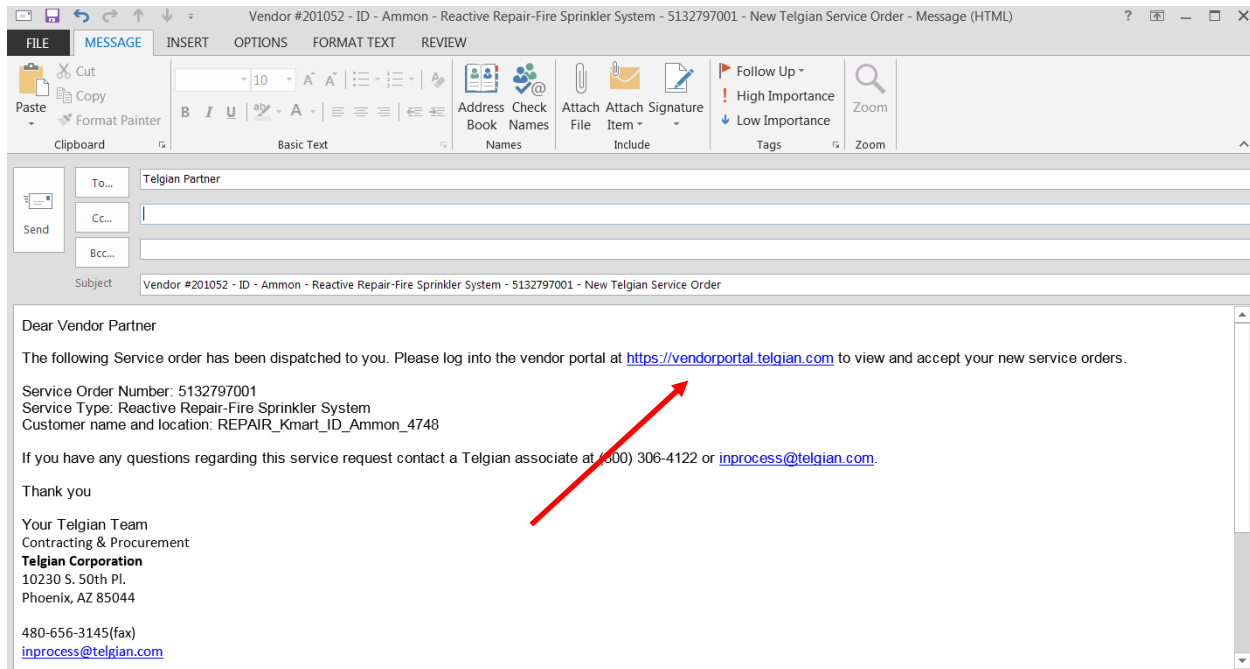
Sincerely,

Telgian Portal Team

Email notifications

When a service order has been dispatched, an email will be sent indicating a *New Service Order* has been dispatched.

1. Click on the link in the body of the email that will open your browser and direct you to the vendor portal login page.



Note:

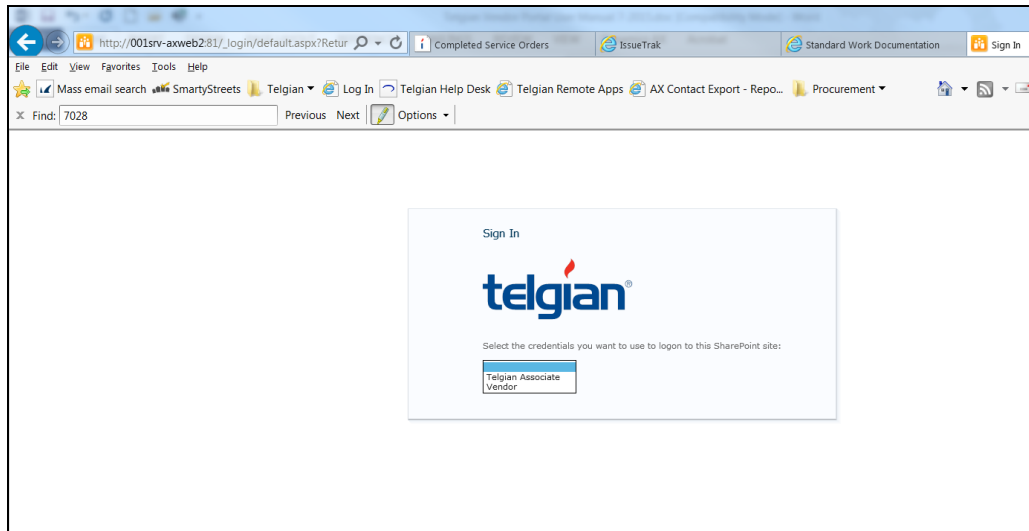
Scheduled inspection email notifications are only sent daily. Therefore, there are times a service order will show in the portal before the email notification is sent. It is okay to accept the service order in the portal without waiting for the email notification.

Reactive inspections and repair email notifications are sent shortly after each service order has been dispatched. These are not sent once a day, but rather, for every service order that is dispatched.

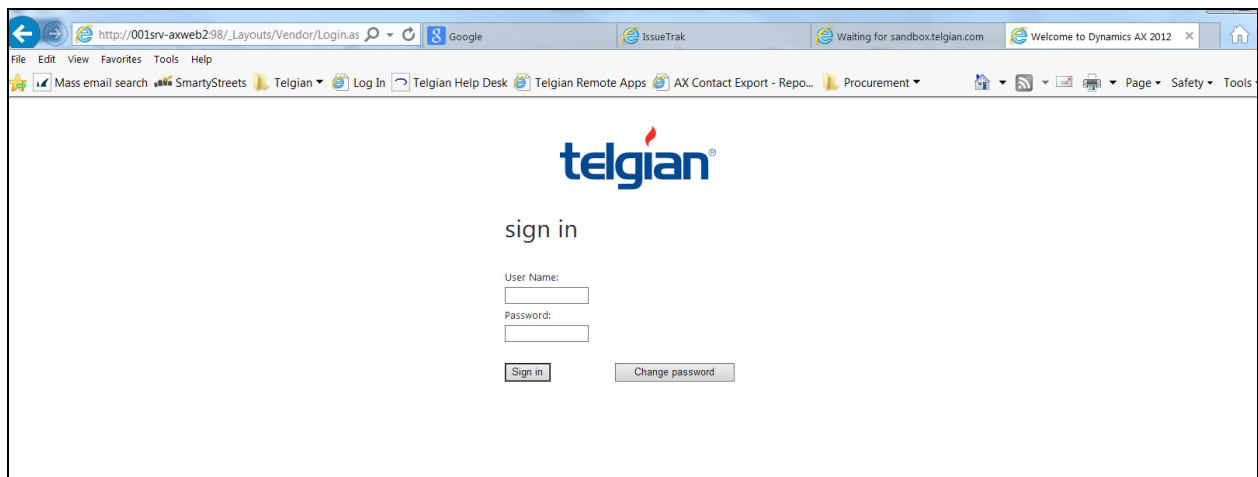
VENDOR PORTAL

How to login to the vendor portal

1. Please utilize the following link to access the supplier portal.
 - a. <https://vendorportal.telgian.com>
2. Using the drop down, select VENDOR and then press ENTER



- Next, utilize the login credentials provided in an email from Telgian
 - User ID
 - Password
- § The first time a user accesses the system a prompt will be shown requesting the password be changed



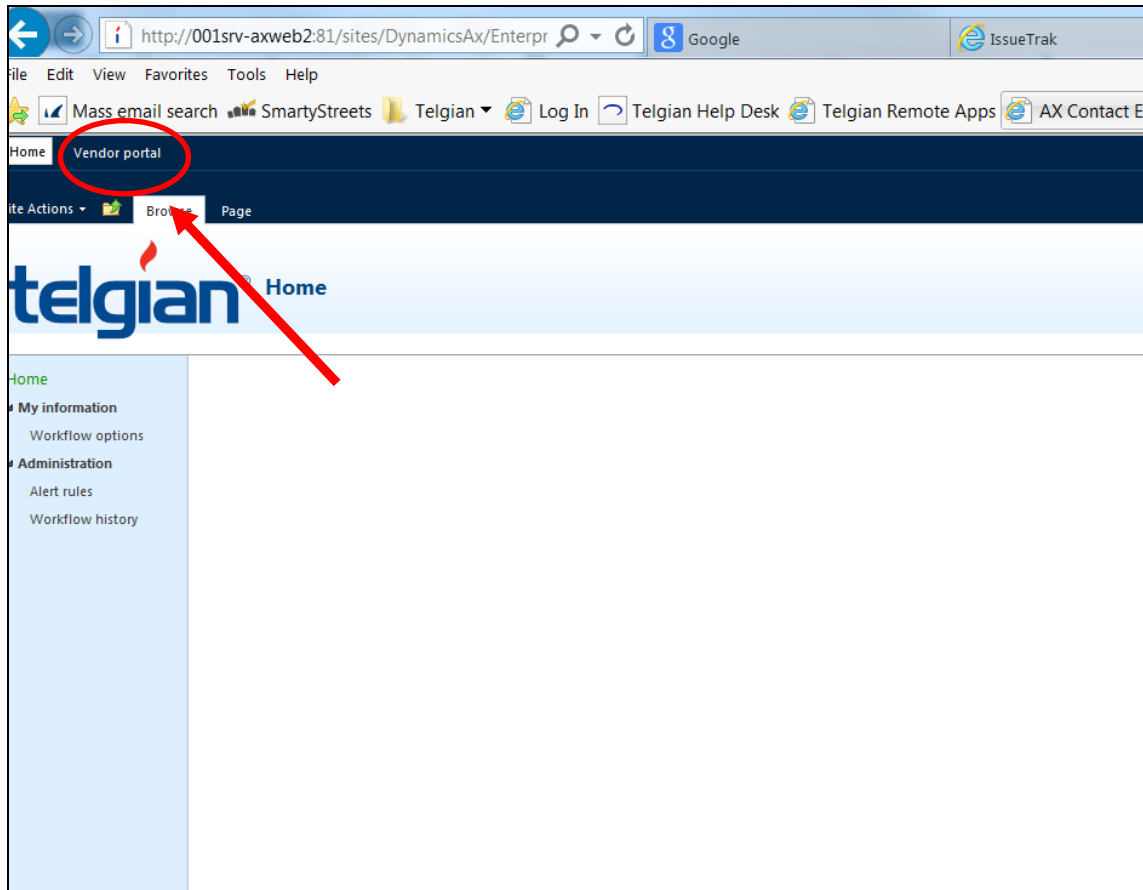
4

VENDOR PORTAL

Navigation

Once the login credentials have been accepted the following steps must be taken to navigate to dispatched work

1. Select *Vendor portal* tab at the upper left of the the home page that will launch your profile page



VENDOR PORTAL

- From the left side of the profile page select *New, Paperwork Printing Queue, Accepted, Held service orders, Completed Service Orders, Rejected service orders, and Finished service orders.*

File Edit View Favorites Tools Help

Home Vendor portal

Site Actions

telgian® Home Vendor portal Profile

Vendor portal

Common

Profile

Contacts

Notifications

Orders

New Service Orders

Paperwork printing queue

Accepted Service Orders

Held service orders

Completed Service Orders

Rejected service orders

Finished service orders

Vendor invoices

Current Vendor

Vendor account: 201005

Company information

Name: Vendor name

Language: en-us

Currency: USD

Address: Your address info here

Contacts

Name E-mail Telephone

Contact(s) information here

Review, Accepting, or Rejecting of Dispatched Service Orders

- When selecting *New Service Orders* the page will load and line item(s) will show detail of the service order(s)
 - If you are presented with multiple service orders, select all service orders in question and then download to Excel by selecting the *Export to Excel* icon. Once downloaded to the spreadsheet the service orders can be sorted and filtered to review

Home Vendor portal

Site Actions

Service order

View Accept Decline Attachments Upload document Export to Excel

Maintain Documents

telgian®

New Service Orders

Select all orders

Service order

Service Type Priority ACD Scope of work Customer name and location Street

This grid is empty.

Review, Accepting, or Rejecting of Dispatched Service Orders (continued)

2. Once the service orders have been reviewed they are ready for the next steps. Please read the next two notes before proceeding

NOTE: **Service order** selects all service orders on the current **page**. In this case both service orders will be affected in unison by the next action

	Service order	Service Type	Priority ACD	Scope of work	Customer name and location	Street
	<input type="checkbox"/>	5128274313 Annual Fire Extinguisher Test and Inspection	9/30/2015 12:00:00 AM		ITMS_Sears Market Delivery Operation_SC_Ladson_MDO_45049	3831 Commerci
	<input type="checkbox"/>	5134703001 Reactive Repair-Fire Extinguisher	1/21/2016 10:00:05 AM	Johnny/Assets in Profits Detection Manager called in and reported needing (B) recharges for fire extinguishers, (D) replacement fire extinguisher.	REPAIR_Sears_NC_Wilmington_1455	3500 Oleander

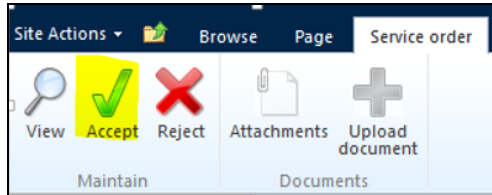
NOTE: **Select all orders** selects all service orders on all the pages of that screen are affected by the next action taken. In the example below, There are 10+ pages of Accepted service orders and by selecting Select all orders, this allows the user to take action on all of those 'like' service orders and update them in a batch. USE CAUTION as this may affect hundreds of service orders at a time.

	Service order	Service Type	Priority ACD	Scope of work	Customer name and location
	<input type="checkbox"/>	5129095203 Semiannual Hood Suppression System Test and Inspection	10/31/2015 12:00:00 AM		ITMS_ZYGGB IHG Army HI Exp Har Hall_NC_Fort Bragg_D3705
	<input type="checkbox"/>	5130728945 Annual Fire Extinguisher Test and Inspection	12/31/2015 12:00:00 AM		ITMS_Bank of America_NC_Waxh 138
	<input type="checkbox"/>	5130868816 Annual Exit and Emergency Light- Min Function Test	12/31/2015 12:00:00 AM		ITMS_CVS_SC_Taylors_4122 3300 Wade Hampton B
	<input type="checkbox"/>	5130869816 Annual Exit and Emergency Light- Min Function Test	12/31/2015 12:00:00 AM		ITMS_CVS_SC_Summerville_4204 301 N Main St

1 2 3 4 5 6 7 8 9 10 ... »

Review, Accepting, or Rejecting of Dispatched Service Orders (continued)

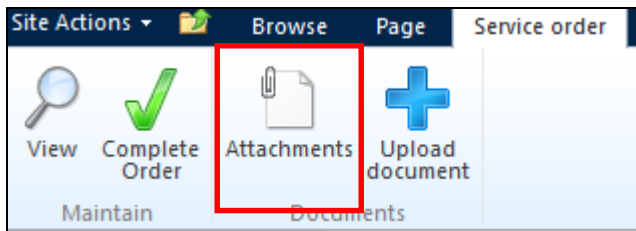
- a. To accept the service order(s) select the *Accept* icon in the ribbon at the top of the page.
- b. Reject service orders by choosing the red "X" to the right of the *Accept* icon.
 - i. NOTE: If a service order is rejected, please email inprocess@telgian.com listing the service order number and reason for the rejection.



NOTE: Once a service order has been accepted or rejected, it will systematically move from the New Service Orders page. The accepted service order(s) can then be viewed on the Paperwork Printing Queue screen using the navigation pane at the left of the screen

Viewing and downloading service order documents

1. To view work authorization and completion forms *individually* select the *Attachments* icon at the top of the page
 - a. The work authorization and work completion forms are placed here. These are the forms your technicians should bring with them to site



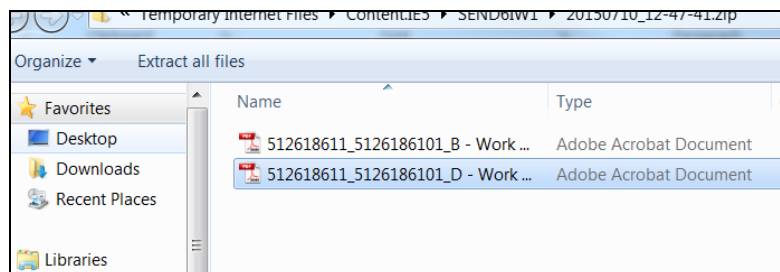
Viewing and downloading service order documents (continued)

2. Select the checkbox to the left of the respective service order(s) and press the *Download documents* button from the *Accepted Service Orders* screen

The screenshot shows the Telgian Vendor Portal interface. The top navigation bar includes 'Home' and 'Vendor portal'. Below this is a 'Site Actions' menu with icons for 'View', 'Complete Order', 'Attachments', 'Upload document', 'Download documents' (highlighted with a red box), and 'Export to Excel'. The main content area displays the 'Accepted Service Orders' screen. On the left, a sidebar lists various options under 'Vendor portal', including 'Common' (Profile, Contacts, Notifications) and 'Orders' (New Service Orders, Paperwork printing queue, Accepted Service Orders, Held service orders, Completed Service Orders, Rejected service orders, Finished service orders, Vendor invoices). The main table lists service orders with columns: 'Service order', 'Service Type', 'Priority ACD', 'Scope of work', and 'Custo'. The first row, with ID 5129095203, is highlighted in blue and has its checkbox checked. A red arrow points to this checkbox. The other rows have unchecked checkboxes.

<input type="checkbox"/> Select all orders	Service order	Service Type	Priority ACD	Scope of work	Custo
<input checked="" type="checkbox"/>	5129095203	Semiannual Hood Suppression System Test and Inspection	10/31/2015 12:00:00 AM		ITMS_Hall_I
<input type="checkbox"/>	5130728945	Annual Fire Extinguisher Test and Inspection Annual Exit and Emergency Light Test and Inspection	12/31/2015 12:00:00 AM		ITMS_138
<input type="checkbox"/>	5130829504	Annual Fire Extinguisher Test and Inspection	12/31/2015 12:00:00 AM		ITMS_Prod
<input type="checkbox"/>	5130830904	Annual Fire Extinguisher Test and	12/31/2015 12:00:00 AM		ITMS_

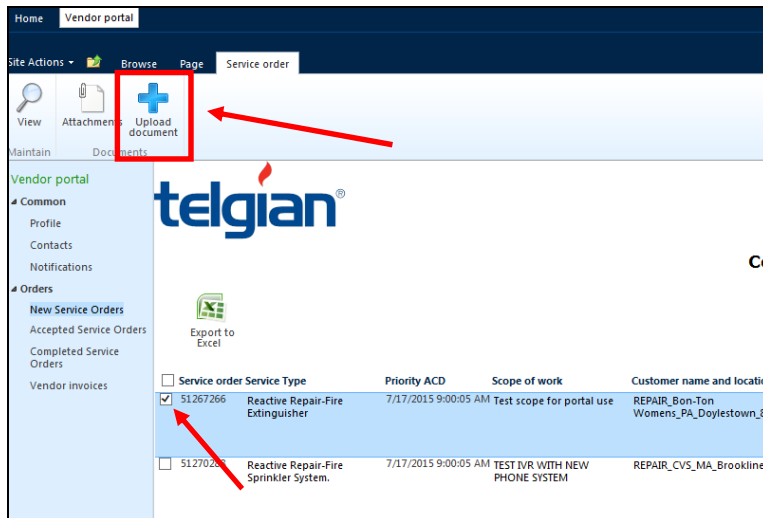
3. Pdf. files will be generated to be printed for the technician/inspector



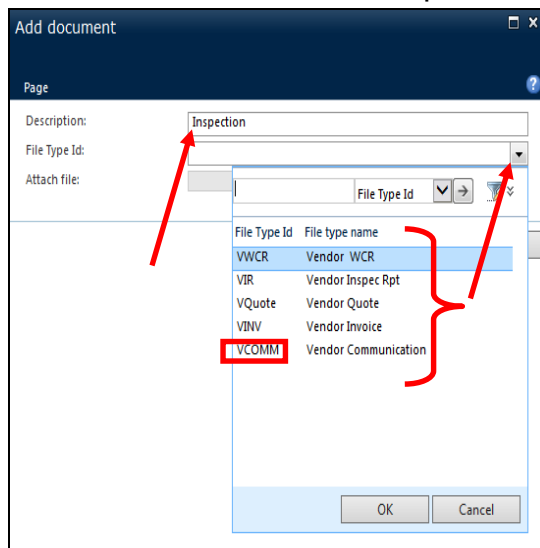
4. Once the service orders' documents have been downloaded the service order will automatically move from the Paperwork Printing Queue screen to the Accepted service orders screen.

Uploading documents to service orders

1. Upload completed work completion/inspection reports and invoices by selecting a single service order and pressing the *Upload document* button in the upper left of the screen
 - a. The *Upload document* button will be highlighted in blue when a valid service order has been selected. Only one service order can be selected at one time to upload documents



2. Enter the file description
3. From the drop down, select File Type ID
 - a. NOTE: VCOMM is used for pictures and email communications



Uploading documents to service orders (continued)

4. Attach the appropriate file saved on your computer using the browse button and then press OK
 - a. NOTE: Please upload documents individually and ensure the proper file type ID is selected.

Add document

Page

Description: Inspection

File Type Id: VIR

Attach file:

5. To verify document attachment was successful, the boxes next to the service order will be checked

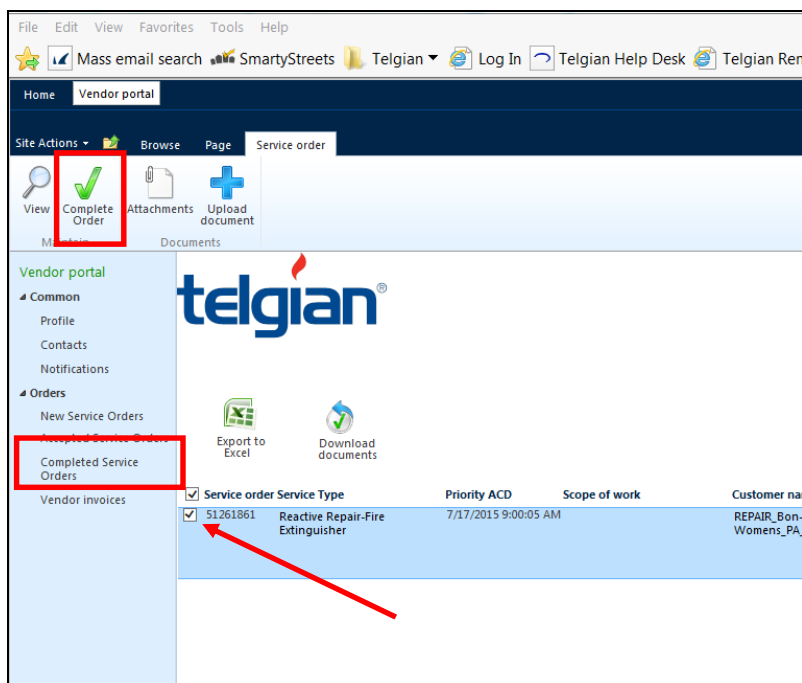
Completed Service Orders									
Type of work	Customer name and location	Street	City	State	Zip Code	Service stage	NTE	Inspection Report	Completion Report
at scope for portal use	REPAIR_Bon-Ton	456 N Main St	Doylestown	PA	18901	Paperwork	250.0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Womens_PA_Doylestown_81	Doylestown Shopping Ctr						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ST IVR WITH NEW ONE SYSTEM	REPAIR_CVS_MA_Brookline_6	1322 Beacon St	Brookline	MA	02446	Paperwork		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

NOTE: Once you begin using the portal, please do not send documents to the fax number (800) 753-5481 or invoices@telgian.com unless the portal is out of service.

Manually completing service orders

If the IVR was not used to check in and out of the service order the system must be manually updated to show the service order is complete. If used properly, the IVR system will systematically update the service order as complete when the technician/inspector checks out.

1. Select the service order(s) to be manually completed and press the *Complete Order* button in the upper right of the screen.



NOTE: Once a service order has been completed, it will be systematically moved from the Accepted Service Orders page to the Completed service order(s).

Service orders in a Held service orders stage

Work that is being held from forward movement will be in a Wait 2 Service Stage

1. Select the service order (only one at a time) and press the *View* button in the upper left of the screen

Held Service Orders

Service order	Service Type	Priority ACD	Scope of work	Customer name and location	Street	City	State	Zip Code	Service stage	NTE
512750564	Annual Fire Extinguisher Test and Inspection	9/30/2015 12:00:00 AM		ITMS_CVS_SC_Aiken_4523	1614 Richland Ave W	Aiken	SC	29801	Wait_2	0.00
5127528204	Annual Fire Extinguisher Test and Inspection	9/30/2015 12:00:00 AM		ITMS_CVS_SC_North Augusta_5575	101 Edgefield Rd	North Augusta	SC	29841	Wait_2	0.00

2. You will see the reason the service order is being held with a description of what is needed
 - a. This example: Awaiting customer approval requires the customer's authorization to proceed

View service order - Service order: 51275056, ITMS_CVS_SC_Aiken_4523

Service order 51275056 | ITMS_CVS_SC_Aiken_4523

Service order: 51275056
Service stage: Wait_2
Description: ITMS_CVS_SC_Aiken_4523
Priority ACD: 9/1/2015 9:00:01 AM
Start date: 9/1/2015 12:00:00 AM

Stage reason code: 1/2 - 04
Code description: Awaiting customer approval
Description:

Lines

Transaction type	Customer name and location	Problem code	Scope of work	Service/Material Type	IR	WCR	Inv
Item	ITMS_CVS_SC_Aiken_4523	Annual Fire Extinguisher Test and Inspection		Annual Fire Extinguisher Test and Inspection			

Rejected service orders

Work that has been rejected will be in a Wait 3 Service Stage

1. Select the service order and press the *View* button in the upper left of the screen

Rejected Service Orders											
	Service order	Service Type	Priority ACD	Scope of work	Customer name and location	Street	City	State	Zip Code	Service Stage	NTE
<input type="checkbox"/>	5127773012	Annual Fire Extinguisher Test and Inspection	9/30/2015 12:00:00 AM		ITMS_Cracker Barrel_SC_Fort Mill_607	295 Carowinds Blvd I-77 & US 21 I-77 & US 21	Fort Mill	SC	29708	Wait_3	300.00
<input type="checkbox"/>	5127774312	Annual Fire Extinguisher Test and Inspection	9/30/2015 12:00:00 AM		ITMS_Cracker Barrel_SC_Piedmont_579	591 Highway 183 I-85 & Highway 153 I-85 & Highway 153	Piedmont	SC	29673	Wait_3	300.00

2. You will see the reason the service order is being held with a description of what is needed
 - a. This example: Missing paperwork – need WCR

View service order - Service order: 51262247, REPAIR_CVS_FL_Homestead_113

Service order

Service order: 51262247
 Service stage: Wait_3
 Description: REPAIR_CVS_FL_Homestead_113
 Priority ACD: 7/22/2015 10:00:04 AM
 Start date: 7/22/2015 9:00:03 AM

Stage reason code: 3-01
 Code description: Missing paperwork (Inv,WCR,PWCR, or Inspec. rpt)
 Description: Need WCR

Lines

Transaction type	Customer name and location	Problem code	Scope of work	Service object	Frequency	Inspection	Report	Completion	Report	Vendor invoice
Hour	REPAIR_CVS_FL_Homestead_113	Reactive Repair-Fire Sprinkler System.	Portal Test - replace 5 outdated gauges in the main riser room	SO-000008						

VENDOR PORTAL

Signing out of the portal

It is very important to log out of the portal.

1. Select the drop down with your user ID listed on the upper right portion of the screen
2. Select *Sign Out*

