Customer Portal
User Manual

EDITION 2.0.0
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I. Login and Changing your Password

To access your PREZIO Customer Portal you will go to the following URL:

https://customer.preziohealth.com/

Once you have accessed the home page for the Customer Portal you can login to the system using the User Name and Password provided by your system administrator.
Changing your Password

Once logged if you would like to update your password you will need to navigate to the My Account page. To do this, click on the your display name on the top right hand side of the screen (Blue Square shown above) and then select “My Account” in the drop down that follows.

This screen will allow a user to update their password by clicking “Change your password” and also allows the user to view their permissions set up for them by the account administrator.

After clicking “Change your password”, enter in your current password and then enter the password you would like and then confirm it. Passwords will not be updated until the save button is clicked (Red Square).

If you would like to update any other information in your profile, please contact the account administrator.

If you are an Account or Region Administrator and wish to learn how to add people to the Customer Portal, please contact PREZIO Health’s Customer Support line for instructions and assistance.
II. Work Orders

Filter Criteria

*Note, Any items with a red asterisk are not filters that are enabled by default but can be enabled by clicking the gear icon (blue square)*

The work order screen will list all work orders for the facilities the account has been assigned. There are a number of different ways a user can filter this list to drill it down. Below is a brief explanation of each filter:

**Order Date**- This filter will allow the user to show items by date (Before, After or Exact).

**Facility**- Facility refers to the facility location the user would like to filter by. These are predefined by PREZIO Health and reference your PREZIO Health customer number. The list will only show the facilities that have been assigned to the account by the account Administrator.

**Order#**- This allows the user filter by a specific order number.

**Equipment Type**- This filter will allow the user to filter for equipment of a certain type.

**Status**- This filter will allow the user to filter for all Work Orders with a certain Status.

**Reference Number**- Customer Reference Number is a number that is provided to the customer on their Work Order from PREZIO Health. This filter enables the user to search all instruments that are under a single Customer Reference #.

**PO#**- This filter refers to the Work Orders PO# and gives the user the ability to see all Work Orders attached to a specific PO#.

**Serial #**- This will allow the user to filter for work orders by serial number.
Filter by Order Date

The above search was filtered to “After” 6/10/2015. Therefore the only Work Orders that appear are Work Orders that fall after the preset search date. Order Date can also filter results by “Before” & “Exact”.

Filter by Facility

When filtering by Facility, only Work Orders pertaining to that Facility are displayed. The user can select one or more facilities at a time to filter by.
Filter by Order# 

The above filter was set to Exact and the Order# (CP-10060-3). Therefore the only Work Orders that appear are Work Orders that match that exact order #. Order can also filter by “Contains” & “Starts With” which allow for much broader searches.  

Filter by Equipment Type 

The above search was filtered by the Flexible Scopes equipment type, therefore the user will only see work orders pertaining to that type of equipment.
Filter by Status

The above search was filtered by the “In Progress” Status, this will display all work orders that match this status. Status can also be filtered by “Closed”, “Open”, & “Quote”.

Reference Number

The above search was filtered to look for any Reference number that contains “JP-10071-2”. Reference number can also be filtered using “Exact” & “Starts With”.
The above search was filtered to look for any PO# that contains “987654321”. PO# can also be filtered using “Exact” & “Starts With”.
Work Order Details

On the left side of each work order there is a small arrow, this arrow indicates that this field can be expanded upon by clicking on it. Anywhere within the system that this arrow appears, it will allow the user to further expand the field to see more granular details on the selected.

Across the top of the expanded details are the following fields; Status, Serial Number, Date Received, Model, Quantity, Complaint.

Clicking on the status in the details will bring up more information in a popup window including: Description of the repair, Price each repair and the total cost of the repair.
At the highest level, statuses shown are as follows:

- **Open**: Equipment is en-route and has not yet been received by our repair facility.
- **Quote**: We are evaluating the equipment to provide an estimate.
- **In Process**: We have received approval to begin repair and the repair is in process.
- **Closed**: Repair is complete and customer has been invoiced for repair.
- **Complete**: Repair is complete.
- **Billing Data Needed**: Repair is complete. Pending PO to invoice customer and close order.
III. Invoices

Filter Criteria

The Invoice screen can be filtered in many different ways. Each column should have the following icon. Clicking on these icons will allow the user to filter the data listed in the invoice section to only show what is needed.

Each invoice will have a small arrow on the left hand side (orange rectangle). This will expand the field to provide more granular details on the item selected.

Send Billing Inquiries to:
PREZIO Health
25175 Dequindre Road
Madison Heights, MI 48071-4240

Phone: 1-855-667-4831
Email: accounts.receivable@preziohealth.com
IV. Service Request

The Service Request screen will show a list of currently submitted service requests that have been created within customer portal only. On the right hand side of each submitted Service Request is a Cancel Request button (Red Rectangle below), this will send a request to PREZIO Health to cancel the request if possible. If the service request is able to be canceled, the canceled checkbox will be checked on the service request once we successfully cancel the order (Orange Square below).

Submit a new Service Request

The first step in entering in a new Service Request form is to click on “New Request”. Once the best course of action is determined, enter the appropriate information from the next screen.

(See example image of a service request form on the next page)

- **PO Number**
- **Shipping Type (FedEx Shipping or PREZIO Pickup)**
- **Whether you are:**
  - Returning a loaner
  - In need of a loaner
- **Whether the item has been decontaminated or not.**
- **Equipment Category:**
  - Endoscopic Equipment
    - **Equipment Type**
      - Flexible Scope
      - Power
      - Rigid Scope
      - Video
      - Other
  - Service Type
  - Department
    - Surgical Equipment
    - Other helpful comments that may expedite the repair.

Choosing a FedEx option will allow the user to print a shipping label, PREZIO Pickup will request a PREZIO employee to pick up the items.
# Request Details

<table>
<thead>
<tr>
<th>Facility</th>
<th>Contact Name</th>
<th>Phone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>--- Select Facility ---</td>
<td>Demo User</td>
<td></td>
<td><a href="mailto:2@preziohealth.com">2@preziohealth.com</a></td>
</tr>
</tbody>
</table>

### Address

<table>
<thead>
<tr>
<th>Address</th>
<th>Address 2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Equipment Category

<table>
<thead>
<tr>
<th>--- Select Category ---</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

### Item Information

<table>
<thead>
<tr>
<th>Social #</th>
<th>Item Description</th>
<th>Manufacturer</th>
<th>Model</th>
<th>Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Comments


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### Notifications

Send notifications to...

Submit  CANCEL
Adding Items to a Service Request

To add an Item to the Service Request, click on the green “Add Item” button. A popup window will appear asking for the items Serial Number, if the item in question has previously been entered it will appear in a recently entered list once the user starts typing. If the user is entering in a non-serialized item then “No Serial Number” will need to be checked.

Repeat the above step until all items have been added that are being sent for repair.

If the user would like to notify someone a specific user that the request has been submitted, start typing their name into the “Notifications” section and select the user from the list that appears. The last step is the comments section, this is for any helpful comments that might expedite the repair process. Once finished entering in the requested information, clicking “Submit” will submit the service request for processing.
Shipping Information – Confirmation & Tracking

After the service request has been submitted a confirmation page will appear. This page will display a printable confirmation sheet which includes the details of the request, Request Number & the customer’s Account Number. If a FedEx shipping option is chosen there will be 2 more tabs on this screen, Tracking & View/Print Label. Please print a copy and include the page with your order, It is recommended that a copy be printed for internal records during this process as well.

Tracking a Shipped Item

The tracking page will provide quick access to the FedEx shipping details, this page will display details on where the shipment currently is and if it has been delivered yet or not.
Viewing or Printing a Shipping Label

Click on the “View/Print Label” tab to print a copy of the shipping label.
V. Reports

There are 2 reports to choose from, Facility Summary Report & Repair Trend Report. Each report will generate based on the information that is entered in.

**Facility Summary Report** - The Facility Report is a table based report that provides historical data. This report will provide the following fields.

- **Facility Name** – Facility name
- **Ship to #** – PREZIO Health customer number
- **Month-Year** – Expandable field to show all items for a particular month and year
- **Asset Category** – Breaks up repairs by segment (Flexible Scope, Power, etc.)
- **Asset Type** – Type of instrument being repaired
- **Model #** – Instrument model number
- **Serial #** – Instrument Serial Number
- **Customer PO #** - PO# provided to PREZIO Health
- **Service** – PREZIO Health cost for repair

**Repair Trend Report** – The repair trend report provides a bar graph view of the cost in repairs by month. The report also gives the user the ability to look at multiple facilities within the organization and see there cumulative breakdown within the provided graph.
Exporting Data

Both reports can be viewed, exported and saved in many different formats. The formats that can be exported are:

PDF; Excel; Word