



## Customer Management Portal

### What is it?

The Customer Management Portal (CMP) allows your customers to view their jobs, invoices, company information and pricing in real-time via a secure online portal.

Customers can request or accept quotes and jobs as well as access current information on the status of existing projects.

Within the CMP, customers can access all of their asset management history and advanced test reports. Up-to-date job histories and invoices are on display and can be accessed at any time.

Reports: PPM Report												
Defect Report	Location: 1 Melody St Victoria Point	Year: 2010	go									
Monthly Report	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Site Inductions	<b>Fire Detection System</b>											
Work Method Statements	Annual Cert. Date											
Budget Forecast	5 Yearly										✓	
Life Cycle Analysis	Annually										✓	
Reference Material	Six Monthly										✓	
<b>PPM Report</b>	Monthly										✓	
	Due: 8											
	Tested: 8 (100%)											
	<b>CCTV</b>											
	Annual Cert. Date											
	5 Yearly					✓					✓	✗
	Annually					✓					✓	✗
	Six Monthly					✓					✓	✗

There are two Customer Management Portals; the **Standard CMP** which allows for basic client management functions and the **Advanced CMP**, aimed at a higher level of reporting and interaction with your customers.

### Help your customers to help themselves

By keeping your customers in the loop with live updates on the services being performed for them, the CMP allows you to provide better customer service and reduce your administrative overhead.

### Standard CMP

Standard with all simPRO Enterprise subscriptions.

Allows customers to:

- ✓ Request and accept quotes or jobs
- ✓ View the current status of jobs and invoices
- ✓ Access pricing information
- ✓ View company information

### Advanced CMP

Available on request, the Advanced CMP combines the Standard CMP features with additional reporting options for asset testing and tracking.

Allows customers to view:

- ✓ Monthly Reports
- ✓ Defect Reports
- ✓ Budget Forecasts
- ✓ Life Cycle Analysis
- ✓ PPM Reports
- ✓ Contracts
- ✓ Work Method Statements