# JM Test Systems Customer Portal

User Guide Version 1.09 April 15, 2020

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### Login



Get a quick quote: 1.800.353.3411

View All Products

Search full site ... Go

Refurbished Test Equipment

Quality

f in D

Submit Quote

Quote Cart



Customer Login

- Go to the JM Test website: www.jmtest.com
- Click 'Customer Login' on the top right portion of the web page.

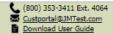


- > If this is your first time accessing the portal, you will need to register to login. Click 'Register to Login' and fill out details as shown on the next page.
- If you already registered and received an email indicating your account(s) were set up, enter your email address and password you used to register and click 'Login'. Press "Login" button to sign in to Customer Portal.
- If you registered, but forgot your password, click the 'Forgot Password' link and you will receive an email so you can reset your password.
- If you have any questions or concerns, please call us at (800) 353-3411 or email us at custportal@jmtest.com.

### Login cont.

### JM Test systems

### **Customer Portal**



Registration Data					
Name:*	First Name	Last Name			
Acct #:	Acct #				
Company:*	Company				
Doing Business As:	Doing Business As				
City/State:*	City	State •			
Phone:*	Phone	Extension			
Notes:					
Authorization	Data				
E-mail:* Password:* Confirm password:*	Password	食食	Password safety		
	nxf3z C Show another code * Indicates required field Sign Up				

- When you click 'Register to Login', the screen above appears. Required fields have an asterisk and must be filled out to submit the registration.
- > The email address you enter above will become your login for this portal.
- > IMPORTANT: Please be sure to create a password that is secure. Make sure it is not a password someone could easily guess. The Password safety feature on the right of the password will indicate the level of security. We highly recommend you use a password that generates 5 stars.
- When you are finished filling out all your details, enter the code shown on the screen and click 'Sign Up'.
- Please allow up to 48 hours for a JM Test customer service representative to set up your account(s) to allow you access.

### Menu



- The Menu Bar consists of 6 options.
  - a. Home Displays Quick Search options. See "Home" for details on how to use the Quick Search options.
  - b. All Equipment Displays all equipment serviced at JM Test, including equipment status. See "All Equipment Screen Explanations" for details on how to search for your equipment and display the results.
  - c. ESL Equipment Displays all ESL equipment serviced at JM Test, with details for each piece serviced.
  - d. Rental Equipment Displays all equipment rented from JM Test with status dates.
  - e. Print Test Reports Displays <u>completed</u> equipment details and gives ability to View/Print Documents. See "Print Test Reports" for details on how to view and print your test reports and associated documentation.
  - f. Contact Support Allows you to contact to a Customer Service Representative.

### Home



- ➤ Home screen displays 3 Quick Search options.
  - a. Option 1: Will take you directly to the 'All Equipment' screen and display all of your equipment and their status for the <u>last order received</u> by JM Test.
  - b. Option 2: Will take you directly to the 'All Equipment' screen and display all of your equipment at JM Test that has not been completed and returned to you.
  - c. Option 3: You can enter criteria to search by any or all of these fields: manufacturer serial number, ID number, purchase order number.
    - 1. Enter criteria into one or more fields. You can enter all or part of the criteria for which you are searching.
    - 2. Click "Submit". You will be brought to the "All Equipment" screen and the data you searched, if found, will be displayed.

### All Equipment - Screen Explanations



- 1. Account names can be listed 2 ways depending on if the user is associated with a single account or multiple accounts
  - a. Single account All Equipment screen, will be listed to the upper right of the screen. Print Test Reports screen, will be listed in the top middle of the screen.
  - b. Multiple accounts No accounts will display at the top of the screen. A new column will display labeled Customer Name. The user can sort or filter this column.
- 2. Clicking on the gear will display options to add additional columns to the table.
  - a. Select all will display all columns in the table
  - b. Save Column Defaults will save your selections. This will be your default each time you log in.
  - c. You must set the defaults for the My Equipment page and the Print Test Reports screens separately.

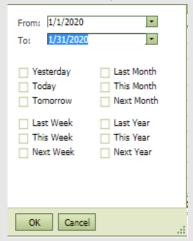


### All Equipment - Screen Explanations cont.

- 3. Table Headers are sortable.
  - a. Click on a column heading one time to sort all results in ascending order. Click again to sort in descending order
- 4. Column width is adjustable.
  - d. Position mouse near the bar between two column headings until the double-sided arrow appears. With left mouse button held, drag to left or right to adjust column width.

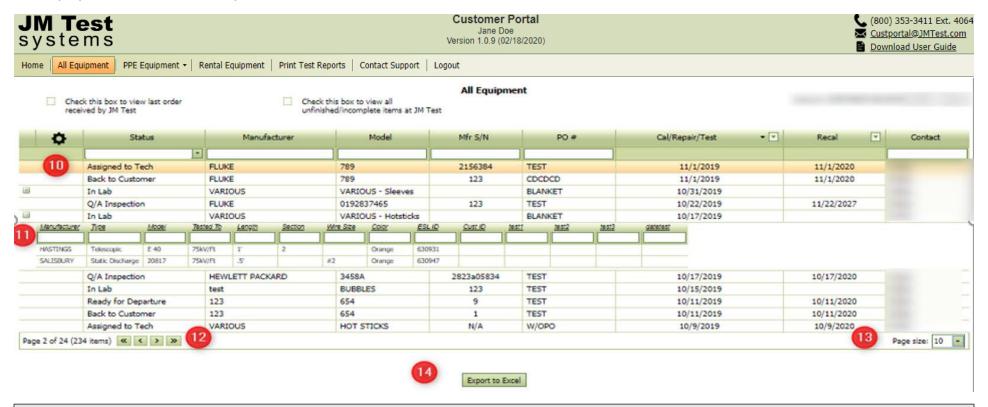


5. Clicking the arrows on the Cal/Repair/Test and Recal columns will display a Calendar to select a range or a timeframe for these date fields.



- 6. Select one of the check boxes for specific results, or leave boxes unselected to see all items including items Back to Customer.
- 7. All columns with white text boxes can be typed into to search specific criteria and automatically display search results. You can enter all or part of the data for which you are searching.
- 8. Access to the Instruction Manual for the JM Test Customer Portal is available by clicking the red 'Download User Guide" link.
- 9. Quick link to send an email to a Customer Portal Service Representative.

### All Equipment - Screen Explanations cont.



- 10. When using the search text boxes or entering calendar/date criteria, a hyperlink labeled 'Clear' will appear in the in the first column. Use this hyperlink to clear your search criteria.
- 11. By clicking the + symbol, ability to view details on equipment that comes to JM Test in multiples example: gloves, hotsticks, gauges
- 12. Depending on the page size, there will be previous and next arrow buttons to help with navigating.
  - a. << Goes back to the first page of the results
  - b. < Goes to previous page
  - c. > Moves forward to the next page
  - d. >> Moves forward to the last page of the results
- 13. Page size default is 10 results per page. Click the arrow to select more results per page.
- 14. Export to Excel allows a user to export all data displayed into a spreadsheet.

# All Equipment - Screen Definitions

View Leat Order Dessived	Chapting this have will display all items on the last and or of items received at IM Test
View Last Order Received Checkbox	Checking this box will display all items on the last order of items received at JM Test.
View All Unfinished/Incomplete Items Checkbox	Checking this box will display all items that are unfinished/incomplete at JM Test.
Customer Name	JM Test customer account name – If you are logged in and viewing only one account, this column will not be displayed.
Status (Drop Down)	Displays the item status.
A/R Invoicing	Item is ready to be invoiced
Assigned To Tech	Item is assigned to a specific technician to be worked on
Awaiting Parts	Item has additional parts on order so that any necessary repairs can be completed
Back To Customer	Item has been returned to the customer
Estimate	Item is submitted for an estimate approval by the customer
In Lab	Item is in lab being worked on or ready to be worked on
In Metrology	Item has been sent to a Metrology Engineer for further review or work
In Transit	Item is in transit from one JM location to another
Lab Management	Item has been sent to Lab Management for further review
Q/A Inspection	Item has been completed by the lab and is waiting for Quality Assurance inspection
Ready For Departure	Item has been invoiced and is ready to Pick Up/Be Delivered/Be Shipped to the customer
Repair Department	Item has been sent to the Repair Department for review
Return to Lab for Processing	Item is being sent back to the lab from an Onsite job to finish processing
To Factory	Item has been sent to be outsourced for service
Waiting on Customer	Item is waiting on input from customer before service work can continue
Manufacturer	Name of the company that manufactures the item.
Model	Manufacturer's model number of the item.
Mfr S/N	This is the serial number that is assigned by the manufacturer of the equipment. N/A is used if no serial number is available.
Cust ID	Customer assigned ID number. N/A is used if no Cust ID is provided.

# All Equipment - Screen Definitions cont.

Cust S/N	Customer assigned serial number. N/A is used if no Cust Serial is provided.	
PO #	Displays the customer's PO number. If no customer PO is provided, W/OPO will be displayed. This means "Without	
	Purchase Order".	
WO Created	Displays the date the item was entered into our work order system.	
Cal/Repair/Test	Displays the date an item has been completed in the lab.	
Recal	Displays the recalibration date of an item.	
Contact	Customer contact listed on the order.	
WO #	A unique number assigned to a batch of items.	
	When a work order number is followed by a number in parentheses (##), the number in the parentheses indicates a	
	piece count of items in that work order.	
Departure Date	Displays the date an item was delivered back to customer.	
Departure Type	Displays the method of how the equipment was returned to the customer.	
Tracking #	Tracking number for items shipped.	
Pickup Date	Date of when equipment was picked up by a JM Test Driver.	

### PPE Equipment – View PPE Details



- 1. Majority of PPE equipment that comes to JM in multiples for testing or repair are available for viewing by selecting the PPE Type from the dropdown.
- 2. Table Headers are sortable.
  - a. Click on a column heading one time to sort all results in ascending order. Click again to sort in descending order
- 3. Column width is adjustable.
  - a. Position mouse near the bar between two column headings until the double-sided arrow appears. With left mouse button held, drag to left or right to adjust column width.



4. Export to Excel allows a user to export all data displayed into a spreadsheet.

### PPE Equipment – View Inventory



- 1. Customer Personal Protection Equipment (PPE) stored and managed in JM Test Systems' climate-controlled environment. If you would like more information on our Inventory Management Program, please contact (800) 353-3411 Ext. 3931
- 2. Table Headers are sortable.
  - a. Click on a column heading one time to sort all results in ascending order. Click again to sort in descending order
- 3. Column width is adjustable.
  - a. Position mouse near the bar between two column headings until the double-sided arrow appears. With left mouse button held, drag to left or right to adjust column width.



- 4. Quantity of odd lefts, odd rights and pairs for inventory stored at JM Test Systems.
- 5. Export to Excel allows a user to export all data displayed into a spreadsheet.

### Rental Equipment

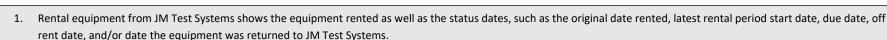


Customer Portal Jane Doe Version 1.0.9 (02/18/2020)





6 Create Document(s) Export to Excel 5												
Order #	Status	ID#	PO#	Manufacturer	Model	Description	Initial ▼ Date Out	Re-rent 🔻 Date	Due ▼ Date	Off Rent 🔻 Date	Date ▼ In	View/Print Docs
			XXX									Select All Clear All
9	Open	R4071	XXX	FLUKE	754	CALIBRATOR, MULTIFUNCTION W/ HART	10/12/2016	10/12/2016	11/9/2016		11/12/2018	
100	Open	RD396	XXX	AEMC	8335	ANALYZER, POWER QUALITY 600V 6500AMP FLEX CTS	11/8/2016	11/8/2016	10/28/2016		11/8/2016	
9	Open	R3463	XXX	AEMC	8335	ANALYZER, POWER QUALITY 600V 6500AMP FLEX CTS	10/12/2016	10/12/2016	11/9/2016		11/12/2018	
9	Open	R1774	XXX	AEMC	3945-B	ANALYZER, POWER QUALITY 600V 1200AMP CLAMP CTS	10/12/2016	11/9/2016	12/7/2016		12/8/2016	6
9	Open	R3127	XXX	FLUKE	435	ANALYZER, POWER QUALITY 3 PHASE	10/12/2016	10/12/2016	11/9/2016		11/12/2018	
												Page size: 10



- 2. Table Headers are sortable.
  - a. Click on a column heading one time to sort all results in ascending order.
  - b. Click again to sort in descending order
- 3. Column width is adjustable.
  - a. Position mouse near the bar between two column headings until the double-sided arrow appears.

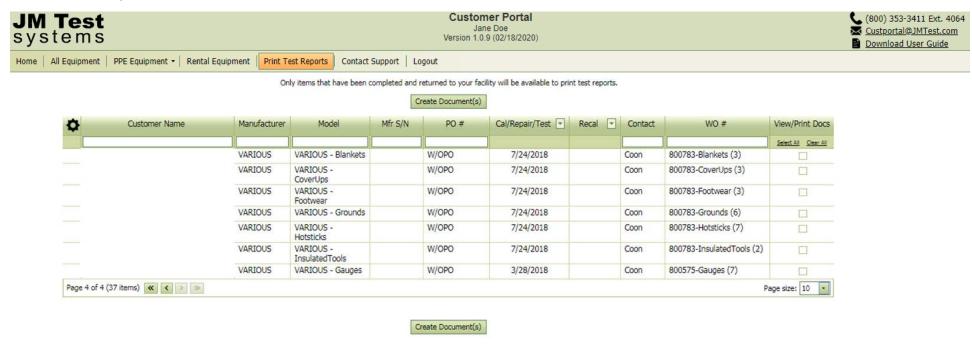
Create Document(s) Export to Excel

b. With left mouse button held, drag to left or right to adjust column width.



- 4. Explanation of date headings:
  - a. Status 'Open' means 1 or more items have not been returned to JM Test, a status of 'Closed' means all items returned to JM Test.
  - b. Initial Date Out Day equipment left JM
  - c. Re-Rent Date Latest rental period start date
  - d. Due Date Due date of equipment based on rental time frame
  - e. Off Rent Date Date equipment was called off rent by customer
  - f. Date In Date equipment arrived
- 5. Export to Excel allows a user to export all data displayed into a spreadsheet.
- 6. To print your test reports/certs and datasheets, check the box on the far right. You may check the box on multiple pieces of rented equipment. Then click 'Create Document(s) to product your reports. If you do not see a checkbox, please contact the Rental Department at (800)353-3411, Ext. 4052.

### **Print Test Reports**



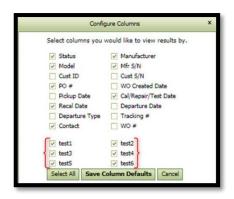
Only items that have been completed and returned to the customer's facility will display on this screen. This screen allows the customer to view and print calibration/repair/test reports and data for those reports, if data is available. Data is usually not available on items that are rejected or scrapped.

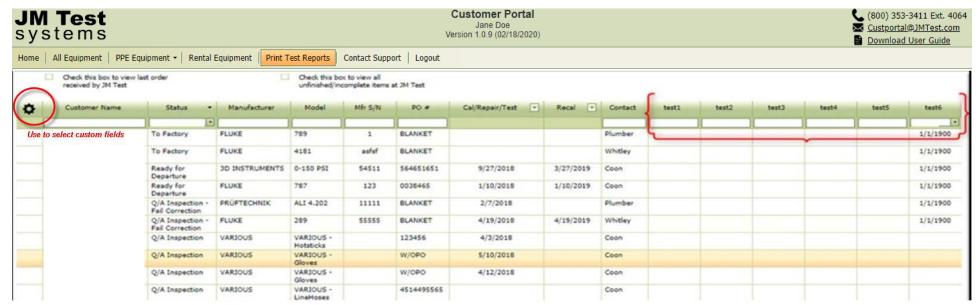
\*\*When a work order number is followed by a number in parentheses (##), the number in the parentheses indicates a piece count of items in that work order.

- View/Print Docs Column:
  - a. Select All Link This link will select all check boxes available
  - b. Clear All Link This link will clear all boxes checked
  - c. Manual selection of check boxes Check mark specific items to be viewed and printed

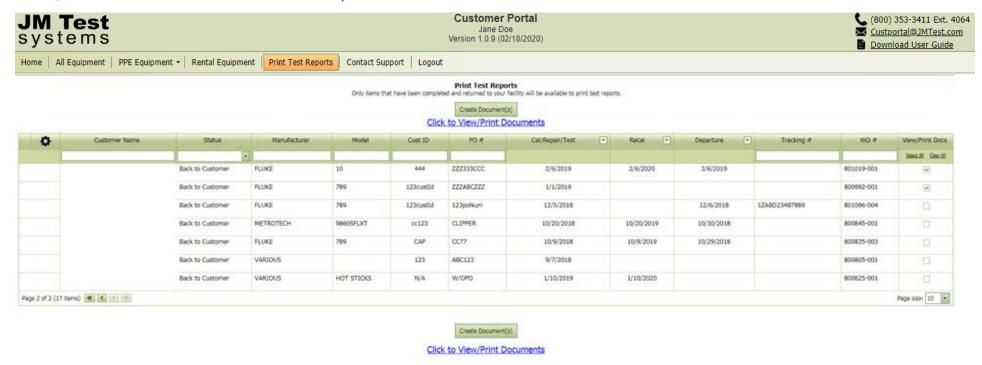
### **Custom Field Columns**

- > Custom fields are added at the customer's request.
- > In order for the custom fields to display in the Customer Portal, ALL accounts registered to the user MUST have the exact same custom fields (including exact spellings, etc.) listed, otherwise, NONE of the custom fields will display in the portal for any account.
- If custom fields exist on all registered accounts, the list of custom fields will display in the Configure Columns display box and the user can select which fields to display.





### View/Print instructions for Internet Explorer Users



IMPORTANT: Adobe Reader is required for these instructions below. See your company system administrator if you do not have Adobe Reader.

- 1. Select which documents to view/print in the View/Print Docs column
  - a. Click on the Select All hyperlink to select all items in the list shown, or
  - b. Manually check each box
- 2. Click the Create Document (s) button
  - a. This will create a link underneath the button for you to click on to view and print your documents
- 3. Click on the 'Click to View/Print Documents hyperlink
  - a. This will open a separate tab in the browser entitled 'jmt-calmap'

### View/Print instructions for Internet Explorer Users cont.



- 4. Scroll to view all of the selected reports
- 5. Bring your mouse down to the bottom center of the screen until an Adobe Menu pops up. If you do not see this menu, check with your company's system administrator on how to change your browser print defaults.



- a. Save as a pdf file.
- b. Print the file.
- c. Navigate to next or previous pages.
- d. Zoom in or zoom out
- e. Show the Adobe tool bar
- 6. Click the printer icon, make sure the default printer is selected, and click print.
- 7. When finished printing close the second tab by clicking the X, in the tab.



### View/Print instructions for Google Chrome Users



- 1. Select which documents to view/print in the View/Print Docs column
  - a. Click on the Select All hyperlink to select all items in the list shown, or
  - b. Manually check each box
- 2. Click the Create Document (s) button
  - a. This will create a link underneath the button for you to click on to view and print your documents
- 3. Click on the 'Click to View/Print Documents hyperlink
  - a. This will open a separate tab in the browser entitled 'Documents.pdf'



4. Scroll through to view all of the selected reports

## View/Print instructions for Google Chrome Users cont.

5. Bring the mouse over the top of the window indicated by the arrow below to display the Adobe Menu pop up. If you do not see this menu, check with your company's system administrator on how to change your browser print defaults.



- 6. The following icons are found at the top of the window:
  - a. C: Rotate clockwise
  - b. Download the file
  - c. Print the file

The following icons are found at the bottom right of the window

- d. Fit to page
- e. Zoom in
- f. Zoom ou

# View/Print instructions for Google Chrome Users cont.

- 7. Click the printer icon, make sure the default printer is selected, and click print.
- 8. When finished printing close the second tab by clicking the X, in the tab.



### Logout

Click Logout to return to the Login screen.



# **Document Revisions**

Date	Initials	Page	Update
03/27/19	jlc	3	Updated Image
03/27/19	jlc	11	Updated definition for WO#
03/27/19	jlc	12	Updated image; added note about piece counts in parentheses
07/19/19	lkr	Multi	Updated menu options; added ESL View Details and View Inventory pages
01/09/20	rlg	Multi	Updated menu options; added Rental Equipment pages
02/18/20	lkr	Multi	Updated menu options; changed ESL references to PPE
04/15/20	Lkr	14	Updated Rental; added details to select equipment and print certs/datasheets