



Online Portal
User Guide



Consolidated
COPIER SERVICES

678-289-5100 • www.consolidatedcopiers.com
124 Westridge Industrial Blvd., McDonough, GA 30253



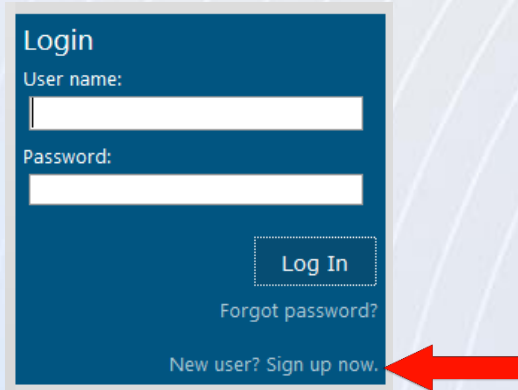
Online Portal User Guide

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Creating a New User

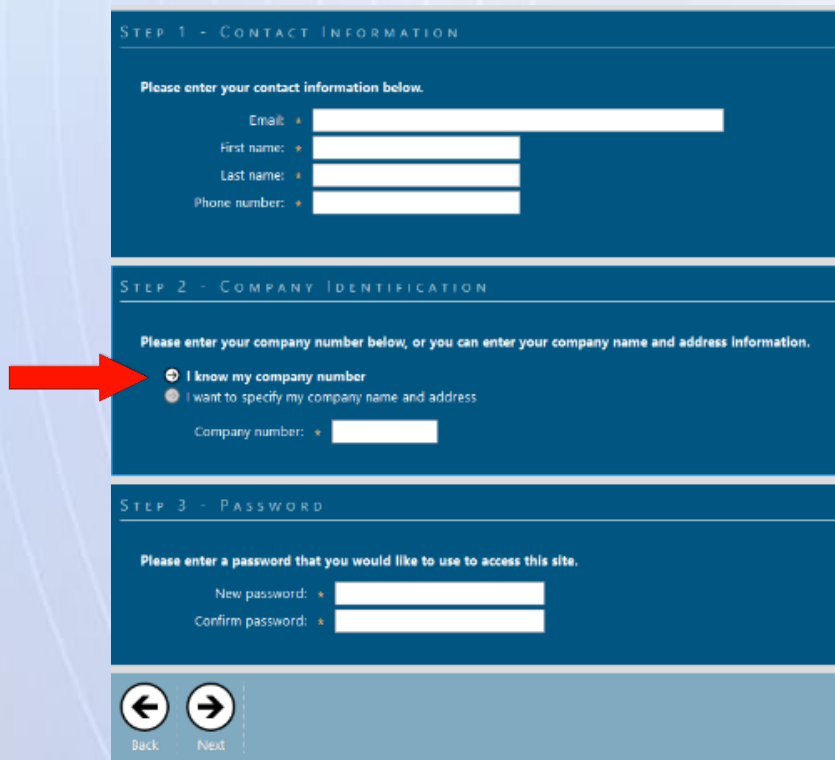
1. Go to info.consolidatedcopiers.com (no www).
2. Click on “New User? Sign up now.” Note that your company must already be set up in our system to register as a new user. For help call us at 678-289-5100.



The screenshot shows a login form with the following elements:

- Header: Login
- User name: [input field]
- Password: [input field]
- Log In button
- Forgot password? link
- New user? Sign up now. link (highlighted with a red arrow)

3. Fill in all fields on the next page. We highly recommend calling us at the number above to obtain your company number for Step 2 (the address feature must match each character exactly and frequently will not find a match).



The screenshot shows a three-step registration process:

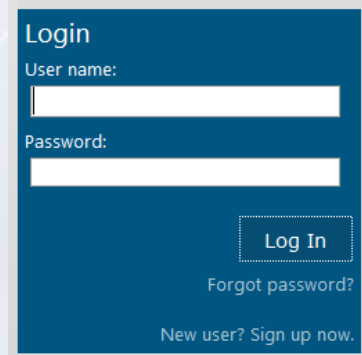
- STEP 1 - CONTACT INFORMATION**: Please enter your contact information below. Fields for Email, First name, Last name, and Phone number.
- STEP 2 - COMPANY IDENTIFICATION**: Please enter your company number below, or you can enter your company name and address information. Radio buttons for "I know my company number" (selected, highlighted with a red arrow) and "I want to specify my company name and address". A Company number input field.
- STEP 3 - PASSWORD**: Please enter a password that you would like to use to access this site. Fields for New password and Confirm password.

Navigation buttons: Back and Next.

4. Click the “Next” arrow button on the bottom of the page. Then you should receive a sign-up confirmation and will be ready to log in.

Logging In

1. Go to info.consolidatedcopiers.com (no www).
2. Fill in your user name, which is the email address you registered with, and your password.
3. Click Log In.



Login

User name:

Password:

Log In

[Forgot password?](#)

[New user? Sign up now.](#)

Resetting or Recovering Passwords

If you have forgotten your password, the quickest way to reset it is to call our office at 678-289-5100 and have us reset it for you immediately. If desired you can change your password again after we reset it for you. Once you log back in, click on your name on the home page (it will say “Logged in as First Name/Last Name”) and then scroll down to “Change Password.”

Managing User Accounts

You must be an administrator to add or remove users on your account and edit permission settings. We set up initial administrators on our end so if you need assistance, please call us at 678-289-5100 and we’re happy to help you.


1. Accessing List of Account Users

- a. Login to your account. If you are an administrator, you will see a tile titled “User Settings” on your account homepage. (If you cannot locate this tile anywhere on your homepage, you do not have administrator rights.)



- b. Click “Users” on the bottom right of User Settings.

c. A page will load displaying all user accounts created for your company.



— User Management —					
Users					Show inactive users
First Name	Last Name	Email	Phone Number	Address	Contact Number
Jane	Doe	janedoe@company.com	123-456-7890	123 Freeway Drive	JD00

1 list item

Help

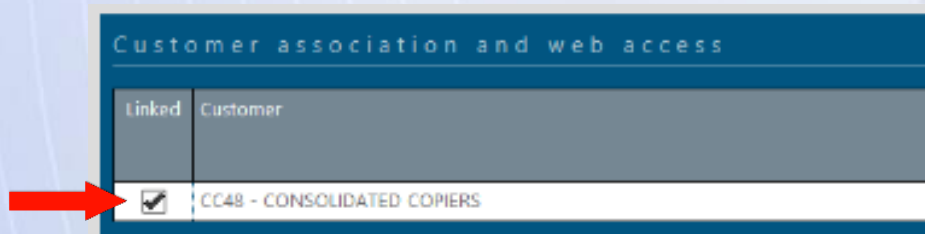
2. Adding a New User

a. On the User Management page (see “Accessing List of Account Users”), click “Add” on the left of the menu bar above “User Management.”



b. Fill in Contact and Address fields on the next page for the new user.

c. Under “Customer Association and Web Access”, you will see each location we have listed for your business. Check the “Linked” box next to each location you want this user to be able to access.



Customer association and web access	
Linked	Customer
<input checked="" type="checkbox"/>	CC48 - CONSOLIDATED COPIERS

d. To the right of each location listed, there are several checkboxes to set permissions that you want the new user to be able to access. Select each checkbox desired:

Equipment: View equipment on account including make, model, serial number

Sales Orders: Order supplies, view order history (not yet available, coming soon)

(Cont. next page)

Service Calls: Request new service calls

Meter Entry: Enter meter readings and view meter history

Account History: View current and past invoices, pay with credit card

User Management: Give administrator rights for users and permissions

- e. Create this user an individual password and make a record of it.
- f. Click “Save” at the top of the page.

3. Removing a User Account

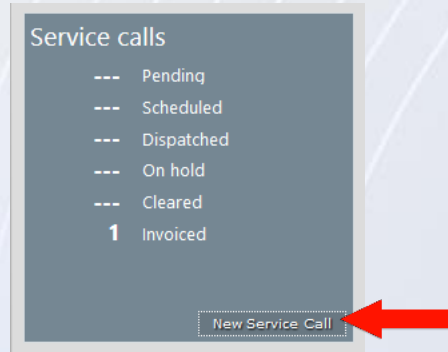
- a. Navigate to User Management page (see “Accessing List of Account Users”).
- b. Click the line with the name of the account user you wish to remove.
- c. Deselect “Active” under the contact information on the next page.
- d. Click “Save” at the top of the page.

4. Changing User Permissions and Settings

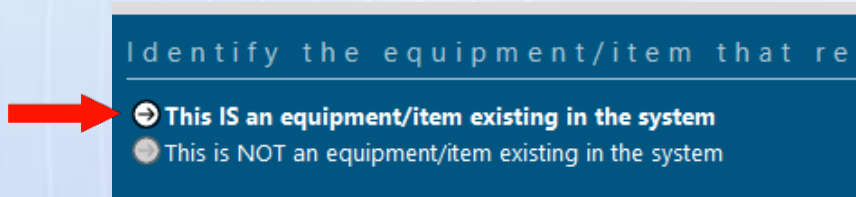
- a. Navigate to User Management page (see “Accessing List of Account Users”).
- b. Click the line with the name of the account user for which you wish to edit permissions or settings.
- c. To change permissions, scroll down to “Customer association and web access.”
 - i. If you wish to add or remove this user from one of your business locations, select or deselect the “Linked” checkbox to the left of the location.
 - ii. If you wish to edit individual permissions at each location, select or deselect each checkbox under the permission categories to the right of each listed location (Equipment, Sales Orders, Service Calls, Meter Entry, Account History, User Management).
- d. To change password for each user, scroll down to “Set password.”

Placing a Service Call

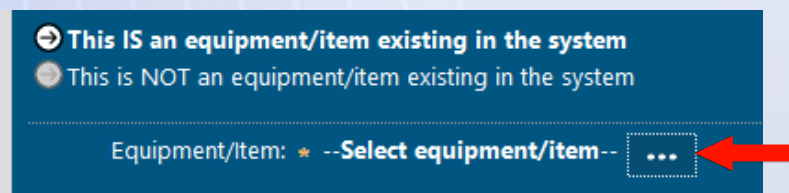
1. Login in to your E-Info online account (see page 4).
2. On your home screen after logging in, locate the “Service Call” box. Click the “New Service Call” button.



3. Select either “This IS an equipment/item existing in the system” or “This is NOT an equipment/item existing in the system.” (The equipment would NOT be listed if you are requesting service on a machine we have not worked on before.)



4. If it IS in the system, click the [...] box to the right of “Select equipment/item”, and select the machine that needs service from the list that appears in the pop-up window.



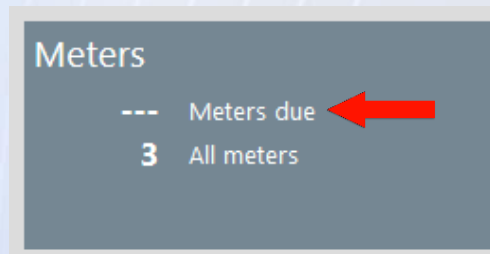
5. If your equipment is NOT in the system, select this option and fill in the Description, Model, and Serial Number fields that appear below.
6. Enter a PO number if desired.
7. Enter a detailed description of the problem for which you need service. Please report any error codes or specific messages given by the machine.
8. Click “Save” at the top or bottom of the page, and your service call is sent!
9. Check back on your home screen “Service Call” box to see the call status.

Ordering Supplies

At this time we do not have supply ordering available online, but hope to make it available in the near future. Please call 678-289-5100 to order supplies.

Reporting Meter Readings

1. Login in to your E-Info online account (see page 4).
2. On your home screen after logging in, locate the “Meters” box. Click on “Meters due” for all machines with readings due, or “All Meters” to see the last reported meter counts or submit readings for any machine on your account. (Note that you should receive an email to your requested email address when your readings are due.)



3. Select the machine for which you are reporting a meter reading.
4. The date will default to the current date. If you wish to change the date of the report, click the [...] button to the right of “Meter reading date.”

Meter reading					
Meter reading date: *02/01/2016					
Last Reading Date	Last Reading	Meter Type	New Reading	Status	Meter Validation Message
01/01/2016	100,052	B\W	110, 221	Due	

5. Begin typing your current meter reading in the “New Reading” column. A pop-up window will appear allowing you to enter the full reading. Enter and click “Ok.” *For black and white only machines report the “Total Counter” displayed on the machine. For color machines, report the “Total Black” and “Total Color” displayed.*
6. Click “Submit” at the top or bottom of the page. Review the “Meter Validation Message” column to check if the meter reading was accepted or encountered a problem. If it did not accept the readings, please call our office at 678-289-5100 for assistance.

Viewing All Equipment on Record

1. Login in to your E-Info online account (see page 4).
2. On your home screen after logging in, locate the “Equipment/Item” box.



3. Click the text “On record” to view all equipment listed under your account. This lists all equipment on record whether the machines are under a service agreement or not.
4. Click the text “ON Contract” to view all equipment on your account that **is** covered under a service agreement. For machines under a service agreement, all labor, supplies and parts are included in your contract with the exception of paper, staples, and network/Internet related issues.
5. Click the text “OFF Contract” to view all equipment **not** covered under a service agreement. We still offer service and supplies for these machines, but you must pay per service call or supply order for these machines.

Viewing Financial Account Summary

1. Login in to your E-Info online account (see page 4).
2. On your home screen after logging in, locate the “Account summary” box. There are a few lines to view here but no text is clickable for further information in this box.



3. The “Status” line shows if your account is active or inactive.
4. “Current balance” shows the total of your current outstanding payments.
5. “Credit limit” shows the credit limit set for your account in our system. Note that for most accounts (except major, national, and some multi-location accounts) credit limit automatically defaults in our system to \$500.00.

Viewing Current and Past Invoices

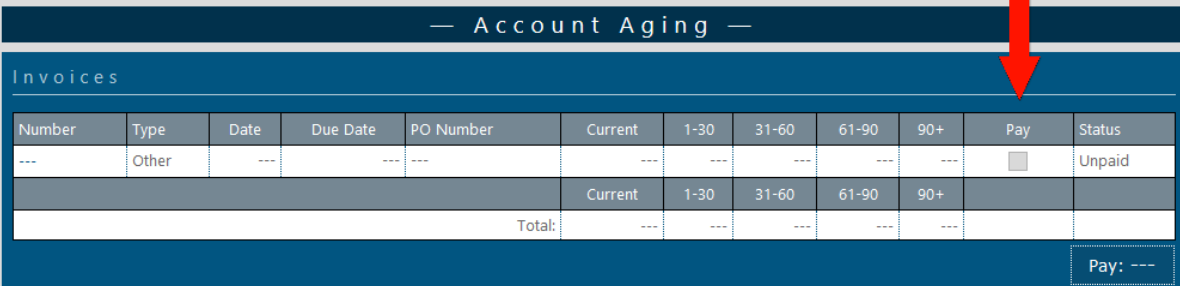
1. Login in to your E-Info online account (see page 4).
2. On your home screen after logging in, locate the “Invoices” box.



3. Click the text “Recent (last 30 days)” to view invoices generated in the last 30 days and see payment status.
4. Click the text “All invoices” to view all invoices, PO numbers if applicable, and payment status.
5. Click “History” to view all invoices generated for your account in the last 12 months as well as purchase and payment detail. Click the dollar amount for further details.
6. Click “Aging” to show only outstanding invoices and how long they have been open.

Paying Open Invoices

1. If you wish to pay all outstanding invoices, locate the “Invoices” box on your home page (see page 10) and select “Pay All”, which should appear when you have an outstanding balance. This will take you to the payment screen. See Step 5 below and following.
2. If you wish to pay select invoices, open Aging invoice report (see page 10).
3. Select each checkbox corresponding to the invoice you wish to pay under “Pay.”



— Account Aging —											
Invoices											
Number	Type	Date	Due Date	PO Number	Current	1-30	31-60	61-90	90+	Pay	Status
---	Other	---	---	---	---	---	---	---	---	<input type="checkbox"/>	Unpaid
					Current	1-30	31-60	61-90	90+		
Total:					---	---	---	---	---		
											Pay: ---

4. Click “Pay” button on the bottom right below Aging report. Your total to be paid will also be displayed here.
5. Follow the prompts to choose your payment date and payment method. To change the payment date, click the [...] button to the right of Date.
6. Input all required information and click “Submit” at the top of the page. You should receive a payment confirmation number.



Thank you for using E-Info online portal!