



# The Ultimate Guide to the AM/PM Online Service Portal

**AM/PM**

NAVIGATION

- Dashboard
- Work Orders
- Store
- User Management
- Notification Setup

**Attention**

CRC operating hours are **04:00-23:00 PST Monday, Friday and 06:00-22:00 PST Saturday, Sunday and Statutory Holidays**; calls opened outside of these hours will be acknowledged the next business day, if this is an emergency please call 1-800-563-4571 to place a call with the answering service.

[Click here to report an issue with this website](#)

Dashboard + Create work order

MOST RECENT WORK ORDERS (PAST 30 DAYS) CHECK ALL WORK ORDERS

Show 10 entries Search:

DATE	STATUS	WORKORDER#	SEV	STORE	ADDRESS	PROBLEM/REMARK	TECH TRAI
Jan/23/2021 10:54 AM	Open	02013259	3	IGA Market Place	101 - 123 Fourth Street	Issue logging into system	
Jan/22/2021 11:25 AM	Open	02013258	3	IGA Market Place	101 - 123 Fourth Street	Unknown SW Software crashed	
Jan/18/2021 04:54 PM	Open	02013253	3	IGA Market Place	101 - 123 Fourth Street	Unknown SW Report requested	
Jan/18/2021 11:10 AM	Billed	02013252	3	IGA Market Place	101 - 123 Fourth Street	Software Issue Report not exporting	
Jan/18/2021 10:50 AM	Billed	02013251	3	IGA Market Place	101 - 123 Fourth Street	Unknown SW Undetermined software issue where the system is unresponsive	
Jan/18/2021 10:28 AM	Open	02013250	3	IGA Market Place	101 - 123 Fourth Street	On-site training requested	
Jan/18/2021 09:52 AM	Billed	02013248	3	IGA Market Place	101 - 123 Fourth Street	Printer Problem Not printing	
Jan/18/2021 09:41 AM	Billed	02013247	3	IGA Market Place	101 - 123 Fourth Street	Unknown SW Issue not yet determined	
Jan/15/2021 03:44 PM	Open	02013244	3	IGA Market Place	101 - 123 Fourth Street	Software Issue Report functionality needs adjustment	
Jan/13/2021 04:54 PM	Open	02013242	3	IGA Market Place	101 - 123 Fourth Street	Unknown SW System down	

**CRC**

CUSTOMER RESPONSE CENTRE

User Email

Password

Remember me

LOGIN

[Forgot Password?](#)

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Powered by **AM/PM**



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## Requesting Access to the Online Portal

To enable access to the Online Service Portal, please contact AM/PM to set-up your Administrator account by following the instructions below:

**1. Email us** at [portalsetup@ampmservice.com](mailto:portalsetup@ampmservice.com) with the following details for your Administrator:

- ▶ **Full Name**
- ▶ **Direct Email Address**
- ▶ **Name of Store**
- ▶ **Store Address**
- ▶ **AM/PM Account Number for Your Store**

Note that the Administrator, once set-up, will have the ability to give access to additional users if needed.

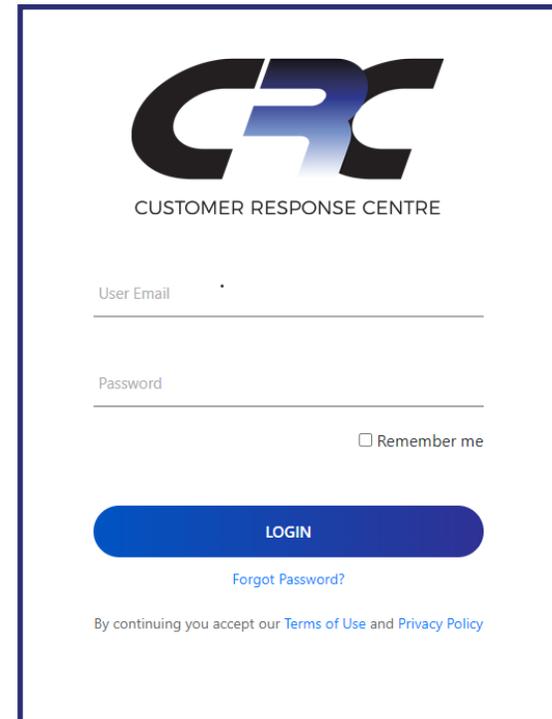
**2. Confirmation:** Once set-up by AM/PM, you will receive an email containing your login rights and details.

*\*Please note that completion of your set-up may take up to 48 hours.*

**3. Login Details:** Upon accessing the portal for the first time, you will be prompted to update the temporary password that was initially given, to one of your choosing.

**4. Admin Access:** Once your password has been updated, your Administrator account will have been successfully created. Additional users can be added by the Admin based on the needs of your organization.

For instructions on how to add users to the online portal, please refer to page 10, "Adding Users to Access the AM/PM Online Service Portal."



The screenshot shows the login interface for the Customer Response Centre. At the top is the CRC logo and the text "CUSTOMER RESPONSE CENTRE". Below this are two input fields: "User Email" and "Password". To the right of the password field is a checkbox labeled "Remember me". A prominent blue "LOGIN" button is centered below the fields. Below the button is a link for "Forgot Password?". At the bottom of the page, there is a small line of text: "By continuing you accept our [Terms of Use](#) and [Privacy Policy](#)".

## Online Portal Dashboard Breakdown

Button to create a new work order.

View your most recent 30 days of work orders.

Shows the support hardware and software contract status based on the location chosen in the dropdown.

Ticket Categories based on selected option in the drop down menu.

Tickets are categorized by: Today, This Week, Last Week, This Month, Last Month and the Work Order Total

Chart shows Severity Levels of work orders over the year.

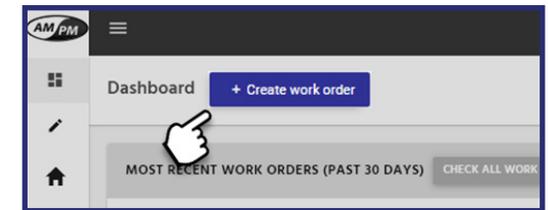
The dashboard displays the following components:

- Dashboard Header:** Includes a '+ Create work order' button and a 'CHECK ALL WORK ORDERS' button.
- Table of Work Orders:** Titled 'MOST RECENT WORK ORDERS (PAST 30 DAYS)'. It lists 11 entries with columns for DATE, STATUS, WORKORDER#, SEV, STORE, ADDRESS, PROBLEM/REMARK, and TECH TRACKING. The statuses include Pending, Closed, Open, Canceled, and Billed.
- Contract Summary:** Shows details for 'FARM BOY - RIDEAU' at '50 RIDEAU STREET #102, OTTAWA, K1N 9J7, Ontario'. It lists support coverage for Software and Hardware, both from Monday-Sunday, 12:00AM-11:59PM, with no statutory holiday coverage.
- Performance Metrics:** A grid of six cards showing work order counts:
  - TODAY: 1 (Date: Jan 12, 2021)
  - THIS WEEK: 1 (Date: Jan 11, 2021 - Jan 17, 2021)
  - LAST WEEK: 6 (Date: Jan 04, 2021 - Jan 10, 2021)
  - THIS MONTH: 7 (Date: Jan 01, 2021 - Jan 12, 2021)
  - LAST MONTH: 14 (Date: Dec 01, 2020 - Dec 31, 2020)
  - TOTAL WO: 291
- Severity Chart:** A donut chart showing 'Uncategorized' tickets at 225. A legend below indicates categories for Severity 1 (red), Severity 2 (orange), Severity 3 (yellow), and Severity 4 (green).
- Yearly Severity Chart:** A bar chart titled 'Severity Chart - 2021' showing the distribution of severity levels across the months from Jan to Dec.

## How to Create a Work Order to Request Service

Need to request software or hardware service with AM/PM? It's now easier than ever to open a work order and stay informed in real-time. To create a work order, follow the steps below:

1. From your Dashboard click on "+ Create work order" button. A Create Work Order pop-up will appear.
2. Fill your information into the Create Work Order pop-up form.



### Work Order Form Breakdown:

**Select Location:** To select the location your service request pertains to, click the dropdown "Select Store" and choose from your listed locations.

**Store Contact:** Determine the best person in your organization that AM/PM could contact for more information or to quickly resolve your issue. Please provide their name, direct phone number and email. If a secondary contact is available and can be reached, please include their details in the Alternative contact sections.

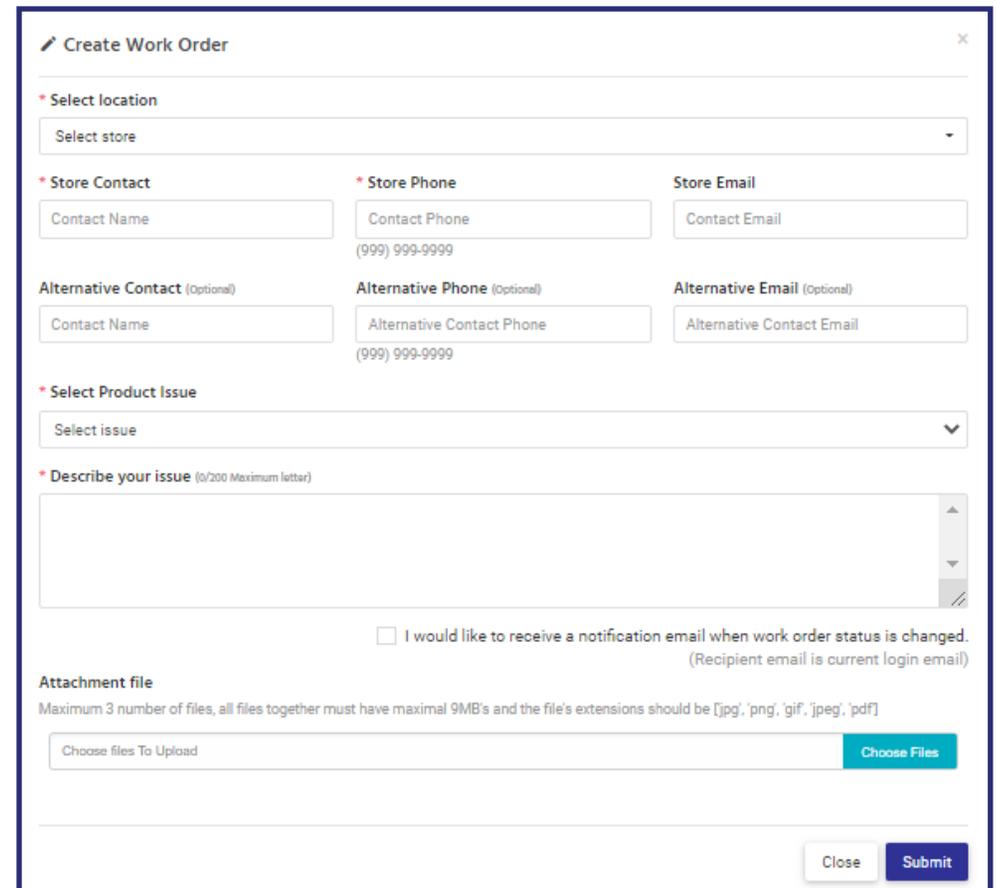
**Product Issue:** Tell AM/PM about the issue you are experiencing from the dropdown menu. For example, are you having an issue with your point-of-sale software or hardware? Describe your issue in detail below to enable us to quickly understand and connect you with the right technician to best assist with your issue.

**Email Notification:** Check the box to stay up-to-date on the status of your work orders via email notifications.

**Attachment Files:** Upload up to 3 pictures or documents that you feel may help assist AM/PM in resolving your issue.

**Click "Submit" when you have completed the form.**

Note that content fields with a "\*" are mandatory and must be filled out in order to successfully submit the work order.



**Create Work Order**

\* Select location  
Select store

\* Store Contact  
Contact Name  
Contact Phone  
(999) 999-9999  
Store Email  
Contact Email

Alternative Contact (Optional)  
Contact Name  
Alternative Phone (Optional)  
Alternative Contact Phone  
(999) 999-9999  
Alternative Email (Optional)  
Alternative Contact Email

\* Select Product Issue  
Select issue

\* Describe your issue (0/200 Maximum letter)

I would like to receive a notification email when work order status is changed.  
(Recipient email is current login email)

Attachment file  
Maximum 3 number of files, all files together must have maximal 9MB's and the file's extensions should be [jpg', 'png', 'gif', 'jpeg', 'pdf]

Choose files To Upload Choose Files

Close Submit

## **How to Attach Files to a New Work Order**

Is there a picture or supporting document that may assist AM/PM in better understanding and resolving your point-of-sale issue? Add up to 3 files (.jpg, .png, .gif, .jpeg, or .pdf) directly to your work order by following the steps below:

1. From your Dashboard click on "+ Create work order" button. A Create Work Order pop-up will appear. Towards the bottom of the pop-up form, click the button "Choose Files."

### Attachment file

Maximum 3 number of files, all files together must have maximal 9MB's and the file's extensions should be [.jpg, '.png', '.gif', '.jpeg', '.pdf']

Choose files To Upload

Choose Files



2. After clicking "Choose Files," a window will appear enabling you to navigate and locate the file that you would like to upload from your computer. Click "Open" to load the file into the work order. You can upload up to 3 supporting files to your work order.

3. Once you have located the file and clicked to "open," the window will disappear and you will see your file now listed within the work order form.

### Attachment file

Maximum 3 number of files, all files together must have maximal 9MB's and the file's extensions should be [.jpg, '.png', '.gif', '.jpeg', '.pdf']

1 files were chosen

Choose Files



circle2.png

size: 74.9 KB type: png



Don't worry if you accidentally selected and uploaded an incorrect file to your work order. To remove before submitting, click the "Trash Can" icon and then reselect the "Choose Files" button to locate the correct document.

## Viewing Work Order Details & Attaching Files to a Previously Submitted Work Orders

Already submit a work order but wish to include an attachment that will better assist AM/PM with your issue? Follow these steps to add up to 3 files to your previously submitted active work orders:

1. From your Dashboard, locate the active work order you wish to add files to. Click on the work order number highlighted in blue or the blue button with the magnifying glass at the end to bring up the work order details.

DATE	STATUS	WORKORDER#	SEV	STORE	ADDRESS	ISSUE	TECH TRACKING	
Mar/25/2021 01:27 PM	Open	02013395	3	ABC123	101 - 123 Fourth Street	Problem with fax machine	HelpDesk to attempt remote fix	
Mar/25/2021 11:58 AM	Open	02013394	3	ABC123	101 - 123 Fourth Street	Self-Checkout Lane down	Technician scheduled	
Mar/25/2021 09:31 AM	Open	02013391	3	ABC123	101 - 123 Fourth Street	Inventory Scanner freezing	Technician to call	

2. Once viewing the work order details, on the right-hand side, click the “Add New Remark” button in the ‘Remarks’ section. The Remarks section shows comments and notes associated with that particular work order.

Work Order Details for WO# 02013395 (Open, SEV 3, Store Notification ON). The Remarks section shows one entry by Hansol Lee on Mar/25/2021 at 01:27 PM regarding the 'Problem with fax machine'.

3. When the “Add Remark” window pops up, write your comments in the “Describe Your Issue” section and add up to 3 attachments by selecting the “Choose Files” button. Click “add” once complete. For more information on uploading files, please refer to the *How to Attach Files to a New Work Order* section.

The 'Add Remark' window includes a text area for describing the issue and an attachment section with a 'Choose Files' button for selecting files to upload.

## How to Locate & Access Your Work Orders

Work orders can be accessed through your Dashboard or via the Work Order tab.

### Work Orders From Dashboard:

Your dashboard will display all recent workorders within the past 30 days. These include requests made by phone, email or the online service portal. Easily find work orders utilizing the search bar or choose to view your work order history by clicking the “Check All Work Orders” button.

MOST RECENT WORK ORDERS (PAST 30 DAYS) [CHECK ALL WORK ORDERS](#)

Show 10 entries Search:

DATE	STATUS	WORKORDER#	SEV	STORE	ADDRESS	PROBLEM/REMARK	TECH TRACKING
Jan/12/2021 01:32 PM	Pending	02013236	3	ABC123	101 - 123 Fourth Street	Problem with the thing	<a href="#">🔍</a>
Jan/10/2021 07:08 PM	Closed	02013213		ABC123	101 - 123 Fourth Street	The fax machine is not working.	<a href="#">🔍</a>
Jan/08/2021 11:06 AM	Open	02013209		Hansol Bubble World HQ Testing	1210 Cameron Sttt	system does not work. store down	<a href="#">🔍</a>
Jan/08/2021 10:07 AM	Open	02013210	3	ABC123	101 - 123 Fourth Street	this is a testing workorder	<a href="#">🔍</a>
Jan/08/2021 08:27 AM	Open	02013208		ABC123	101 - 123 Fourth Street	Unknown SW testing workorder	<a href="#">🔍</a>
Jan/07/2021 08:33 AM	Canceled	02013206	3	ABC123	101 - 123 Fourth Street	Software Issue Software Problem (with the software)	<a href="#">🔍</a>
Jan/04/2021 10:41 AM	Closed	0191259	3	FARM BOY - LESLIEVILLE	1015 LAKE SHORE BLVD EAST	per josier(fb hd) lane 3 cashier screen is black, tried soft rebooting lane but still nothing.	<a href="#">🔍</a>
Dec/31/2020 08:58 AM	Billed	0191040	3	FARM BOY - RIDEAU	50 RIDEAU STREET #102	per Michelle(fb hd) receipt printer on cash #2 is having issues.	<a href="#">🔍</a>
Dec/15/2020 08:46 AM	Billed	0184045	3	FARM BOY - HARVARD SQ HAMILTON	801 MOHAWK ROAD WEST	per Colleen(fb hd) lane #9 has a scanner error on it, remote reboot did not fix the issue.	<a href="#">🔍</a>
Dec/15/2020 08:34 AM	Open	0184041	3	FARM BOY - RIDEAU	50 RIDEAU STREET #102	per Colleen(fb hd) trouble with debit and credit balance	<a href="#">🔍</a>

Showing 1 to 10 of 11 entries Previous 1 2 Next

### Work Orders Tab:

By navigating to the “Work Orders” tab, you have more options to filter and sort your data. Choose to sort either by the work order number, work order status, or for work orders between a specific timeframe. Work orders can be created at any time by selecting the “+ Create Work Order” button.

**AM/PM**

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Work Orders [+ Create work order](#)

Filter  
1 stores selected

Search Workorder#...  [🔍](#) Select All WorkOrder Status

Date: From  To  [Clear all sorting filter data](#)

DATE	STATUS	WORKORDER#	SEV	STORE	ADDRESS	ISSUE	TECH TRACKING
Mar/25/2021 01:27 PM	Open	02013395	3	ABC123	101 - 123 Fourth Street	test	<a href="#">🔍</a>
Mar/25/2021 11:58 AM	Open	02013394	3	ABC123	101 - 123 Fourth Street	testing	<a href="#">🔍</a>
Mar/25/2021 09:31 AM	Open	02013391	3	ABC123	101 - 123 Fourth Street	Test2	<a href="#">🔍</a>
Mar/17/2021 03:02 PM	Open	02013385	3	ABC123	101 - 123 Fourth Street		<a href="#">🔍</a>

## How to Filter Through Work Orders

Depending on the number of stores your organization has, you may have access to view work orders across all locations. For simplicity, AM/PM's online portal provides the ability to sort and filter work orders from your "Work Order" tab.

**Search for a work order by its specific AM/PM work order number.**

**Search for work orders by a specific work order status including Pending, Open, Closed, Billed or Canceled.**

**Search for a work order in a specific date range by selecting the "to" and "from" dates**

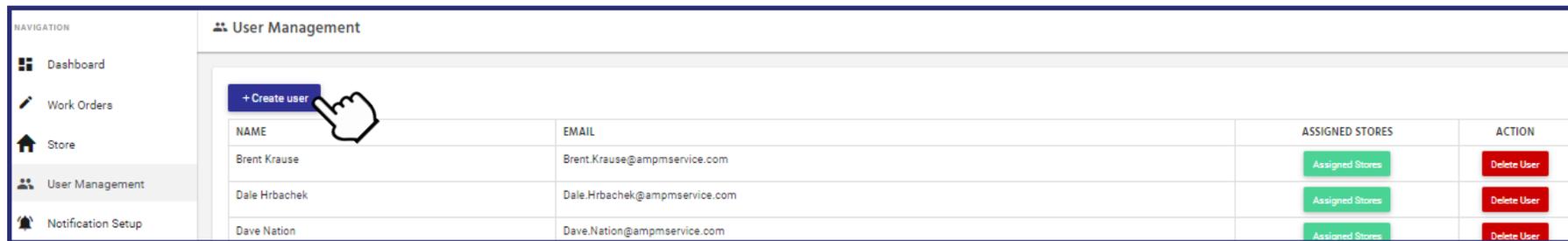
The screenshot shows the 'Work Orders' interface with a filter section. The filter section includes a search box for work order numbers, a dropdown for status, and date range selectors. A table below displays work order details with columns for DATE, STATUS, WORKORDER#, SEV, STORE, ADDRESS, PROBLEM/REMARK, and TECH TRACKING. The table contains 7 entries, with the first one highlighted in red.

DATE	STATUS	WORKORDER#	SEV	STORE	ADDRESS	PROBLEM/REMARK	TECH TRACKING
Jan/12/2021 01:32 PM	Pending	02013236	3	ABC123	101 - 123 Fourth Street	Problem with the thing	
Jan/10/2021 07:08 PM	Closed	02013213		ABC123	101 - 123 Fourth Street	The fax machine is not working.	
Jan/08/2021 10:07 AM	Open	02013210	1	ABC123	101 - 123 Fourth Street	this is a testing workorder	
Jan/08/2021 11:06 AM	Open	02013209		Hansol Bubble World HQ Testing	1210 Cameron Stttt	system does not work. store down	
Jan/08/2021 08:27 AM	Open	02013208		ABC123	101 - 123 Fourth Street	Unknown SW testing workorder	
Jan/07/2021 08:33 AM	Canceled	02013206	3	ABC123	101 - 123 Fourth Street	Software Issue Software Problem (with the software)	
Jan/04/2021 10:41 AM	Closed	01191259	3	FARM BOY - LESLIEVILLE	1015 LAKE SHORE BLVD EAST	per josie(fb hd) lane 3 cashier screen is black, tried soft rebooting lane but still nothing.	

## **Adding Users to Access the AM/PM Online Service Portal**

After initially requesting access from AM/PM and having been set-up with your admin account, you can begin adding additional users to the online portal. If you do not currently have access to the online portal, contact us at [portalsetup@ampmservice.com](mailto:portalsetup@ampmservice.com).

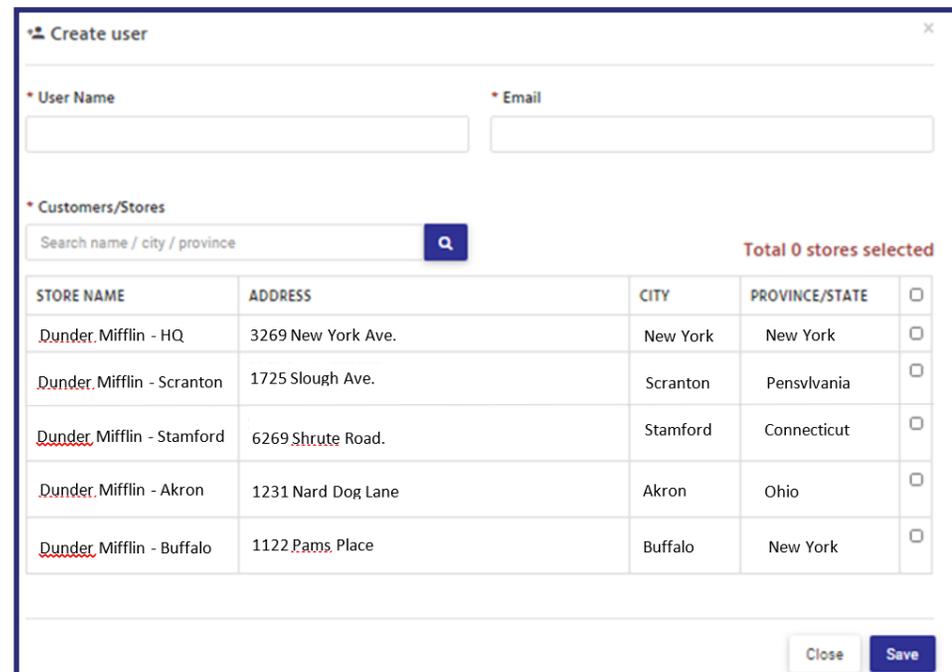
1. Click the “User Management” tab in the Navigation panel on the left-hand side. Select the “+ Create User” button.



2. When the “Create User” pop-up opens, fill in all mandatory fields including the username for the user you are adding and their email. Under “Customers/Stores,” select all stores that this user can have access to. For multiple locations, select all boxes next to the each of the stores on the right-hand side. While as the accounts admin you can add an unlimited number of users to your online portal, AM/PM recommends that only key personnel responsible for placing service requests be given access to prevent confusion or unauthorized work orders.

Once complete, click “Save.” An email will be sent to the user informing them of their new access to the AM/PM Online Service Portal including a temporary password. The user will be prompted to update their password upon their first successful entry into the portal.

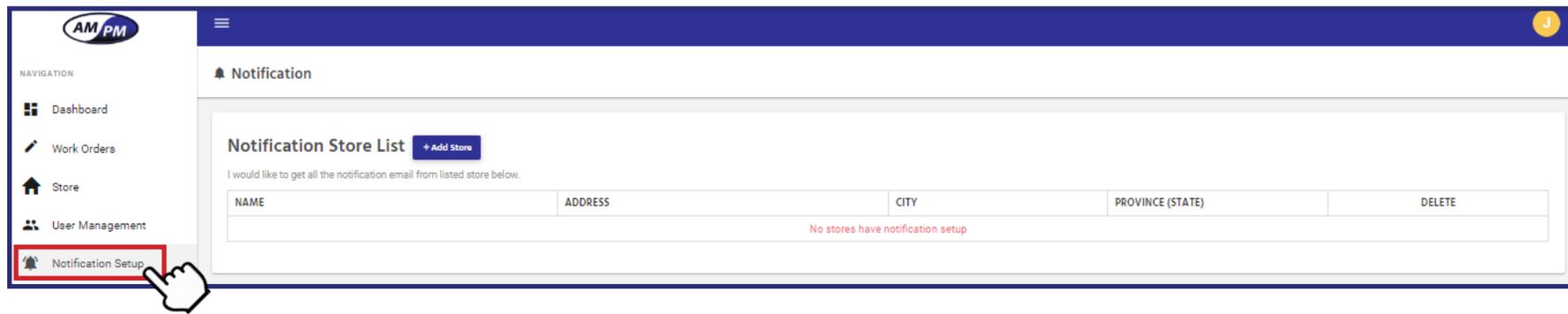
Repeat this process as the Admin until you have added all team members to the AM/PM Online Service Portal.



## Setting Up Email Notifications

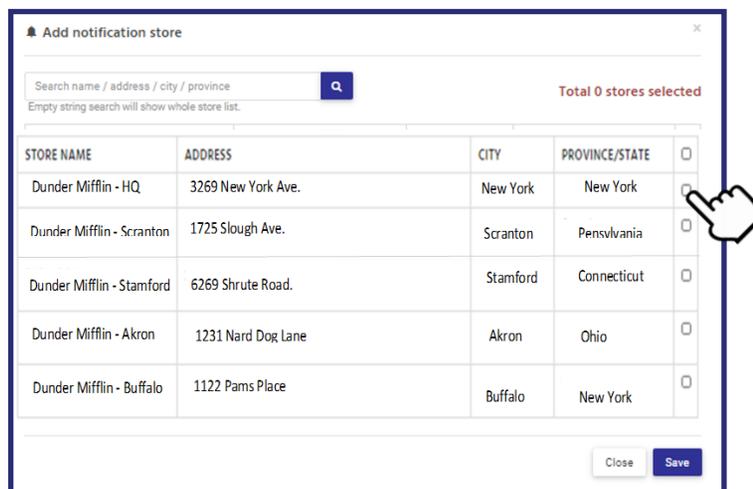
Easily stay up-to-date on the status of your service requests in real-time by choosing to set-up email notifications in the online portal. To receive notifications on all or select stores of your choosing, proceed through the following steps:

1. From the Navigation Menu on the left, click on the “Notification Set-up” tab.



2. Click on the “+ Add Store” button.

This will bring up your list of locations that you can select from in order to receive email notifications about active point-of-sale service.



3. Check the boxes for the locations you wish to receive notifications. When finished, click the “save” button.

Your added location(s) should appear now under your ‘Notification Store List’

To **remove notifications**, visit the “Notification Set-up” tab. Locate the location you wish to take email notifications off of. Under the “Delete” column, click the red “Delete Store in Notification List” button.





***is here to help.***

***24/7 point-of-sale support when and where you need it.***

***Live Customer Support***

***Portal Set-up:*** portalsetup@ampmservice.com

***Support Email:*** help@ampmservice.com

***Toll-Free Phone:*** 1-800-663-4571

***POS Software & Hardware Sales***

***Email:*** inquiries@ampmservice.com

***Toll-Free Phone:*** 1-800-336-2622

***Head Office:*** 604-421-5677



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CUSTOMER RESPONSE CENTRE



*Explore the POSSibilities*