PREZIO Health Help Center

FAQ Topic: Customer Portal Cheat Sheet

Logging In

In the following pages, you will find the useful information for using Customer Portal

Customer Portal Website Address: http://customer.preziohealth.com

Once the account Administrator creates an account for a user they will receive an email that includes the Username and a temporary Password to login. Before the user can login to the account they need to confirm their email address by clicking on the "Click here to confirm your email address" link in the email received.

Confirmation Link:

Click here to confirm your email address.

Once this is done the user is able to login by clicking the link shown once the user confirms their email or navigating to the above website address. Once they login for the first time with their temporary password it ask the user to create a new password.
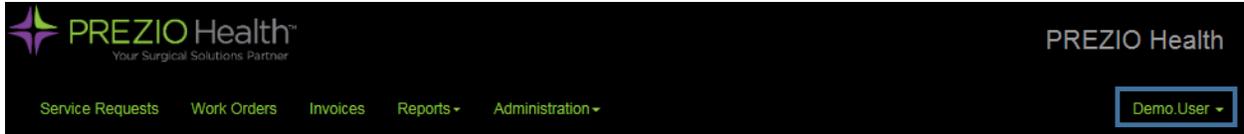
Once logged if you would like to update your password you will need to navigate to the My Account page. To do this, click on the your display name on the top right hand side of the screen (Blue Square shown above) and then select "My Account" in the drop down that follows.

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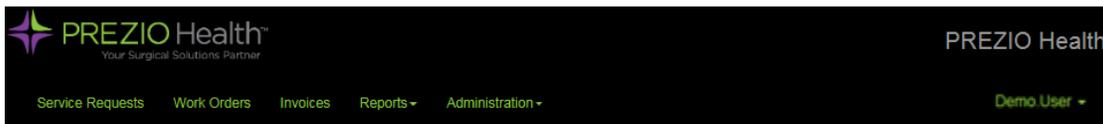
After clicking "Change your password", enter in your current password and then enter the password you would like and then confirm it. Passwords will not be updated until the save button is clicked (Red Square).

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.

Work Orders – 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. You can use the filter button next to each column name to filter the invoices. ▼

	Order# ▲	Status	Facility ▲	Reference Number	PO#	Equipment Type	Order Date ▼	ETC Date
▶	CP-10078-1	Open	PREZIO HEALTH MEDICAL CENTER			FLEXIBLE SCOPES	07-21-2015	

Invoices – The invoice screen will list all invoices 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. You can use the filter button next to each column name to filter the invoices. ▼

	Invoice # ▼	Facility	Amount	Reference #	PO#	Terms	Post Date	Due Date	
▶	122853	PREZIO HEALTH MEDICAL CENTER	$26.00	JP-10002-1	PH100512	I7		09-07-2015	🖨

Service Requests – The Service Request screen will show a list of currently submitted service requests that have been created within customer portal only. You can use the filter button next to each column name to filter the invoices. ▼ On the right hand side of each submitted Service Request is a Cancel Request button (Red square below), this will send a request to PREZIO Health to cancel the request if possible.

⊕ New Request							
Request Numb...	Request Date	Requestor	Loaner Reque...	Shipping Method	Tracking Number	Cance...	
10085	07-24-2015	Eric Turovaara	☐	FedEx Ground	Prezio Pickup	☐	🔍 ⊘

Contacts – The contacts section is where you can set up required and associated people to be notified when a service request is created. These can be set up on a facility/region/facility group or account basis.

If you set a contact up as required for a certain facility/region/group or account, every time a service request is created they will be sent an email when that facility/region/group or account is used.

If they are set as Associated, then the user will have the ability to notify them when creating a service request.

Reports – Facility Summary - The Ship to Summary Report is a table based report that provides you historical data.

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