TMASYSTEMS

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# Born to Run: A Deep Dive into Service Request Lifecycles and Workflows

UC 25 YEARS

OF COMMUNITY, PARTNERSHIP, AND GROWTH

# Mackenzie Soap

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With over 5 years of experience, Mackenzie is a results-driven client success manager and team lead, passionate about building strong client relationships and driving customer satisfaction, while excelling at developing strategies to enhance client retention and foster team growth. Skilled in problem-solving and clear communication, Mackenzie is dedicated to ensuring both client and business success.

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Eric is a Computer Engineering graduate from Milwaukee School of Engineering. He is PMP certified and has worked for TMA Systems for 3.5 years. He brings over 18 years of technology experience including 12 years of CMMS experience, and 3 years of building management experience.

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# Agenda

1. Service Request Portal Introduction
2. Features & Capabilities
3. Components
4. Examples
5. Live Demonstration

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# Introduction

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# Introduction

**01**

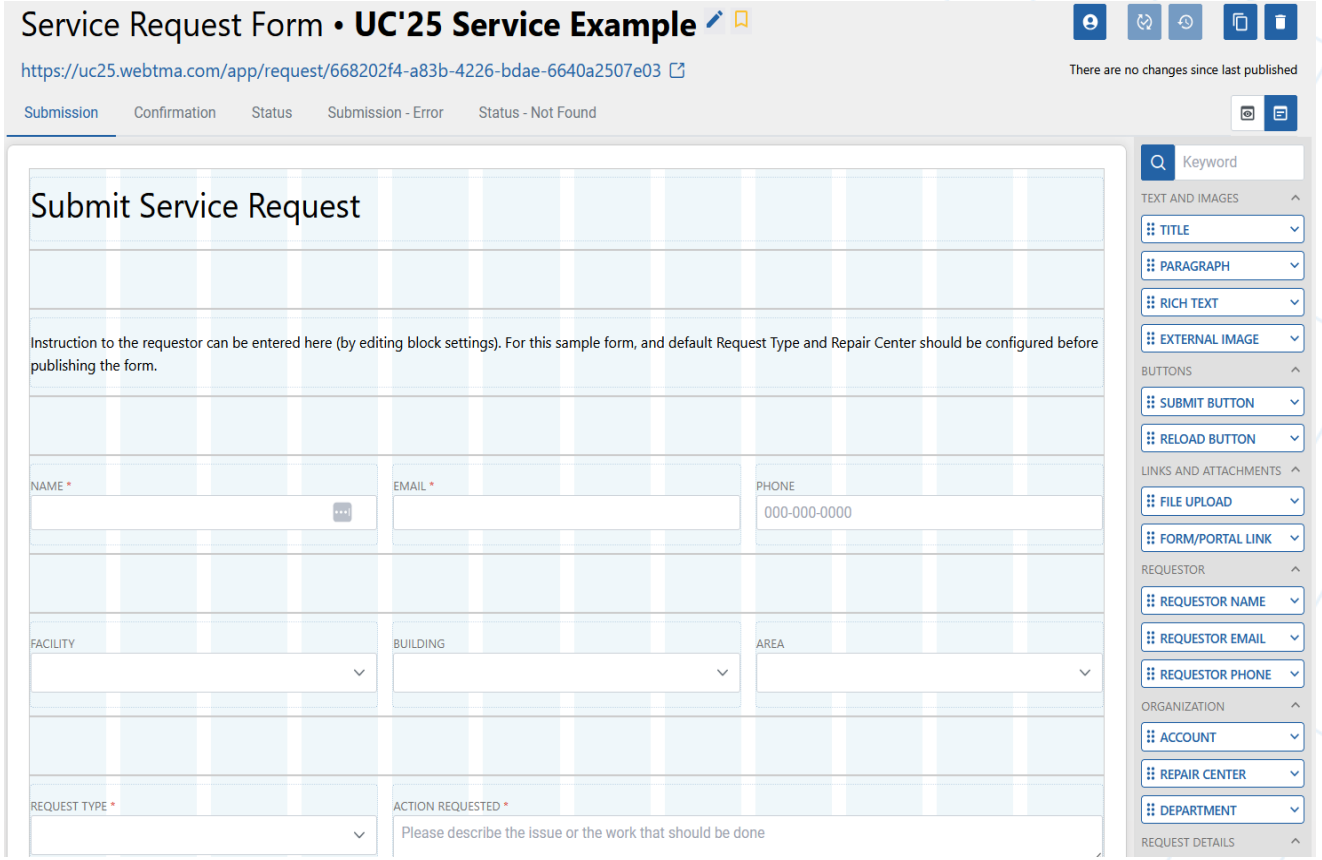
TMA released a new Service Request Portal (SRP) in December 2024 and is available to all customers who own the Service Request module.

**02**

The primary purpose is to modernize and simplify Service Request site development; however, the existing service request pages are not impacted by the release of the new functionality.

**03**

To enable the new SRP functionality, do so through Window Access at
Admin > User Management > Records or
Admin > User Management > Groups

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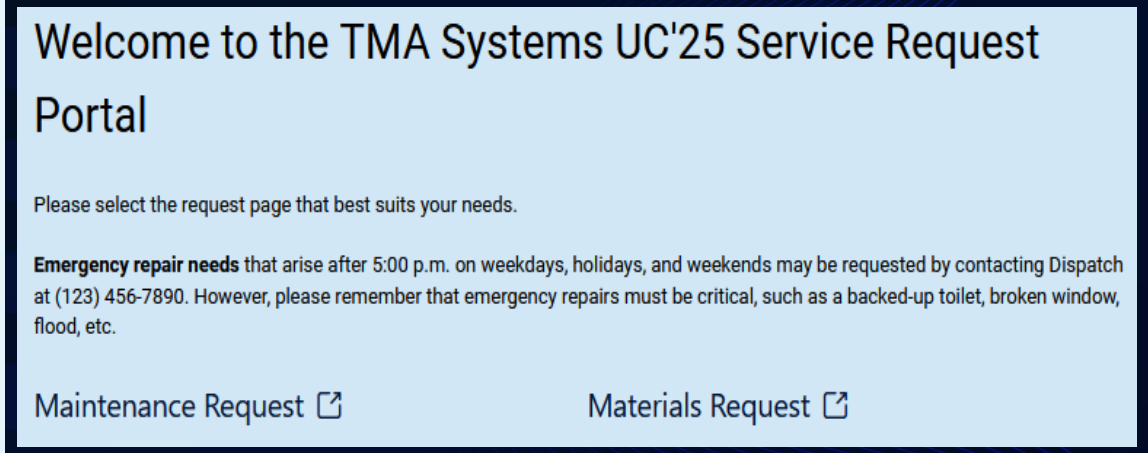
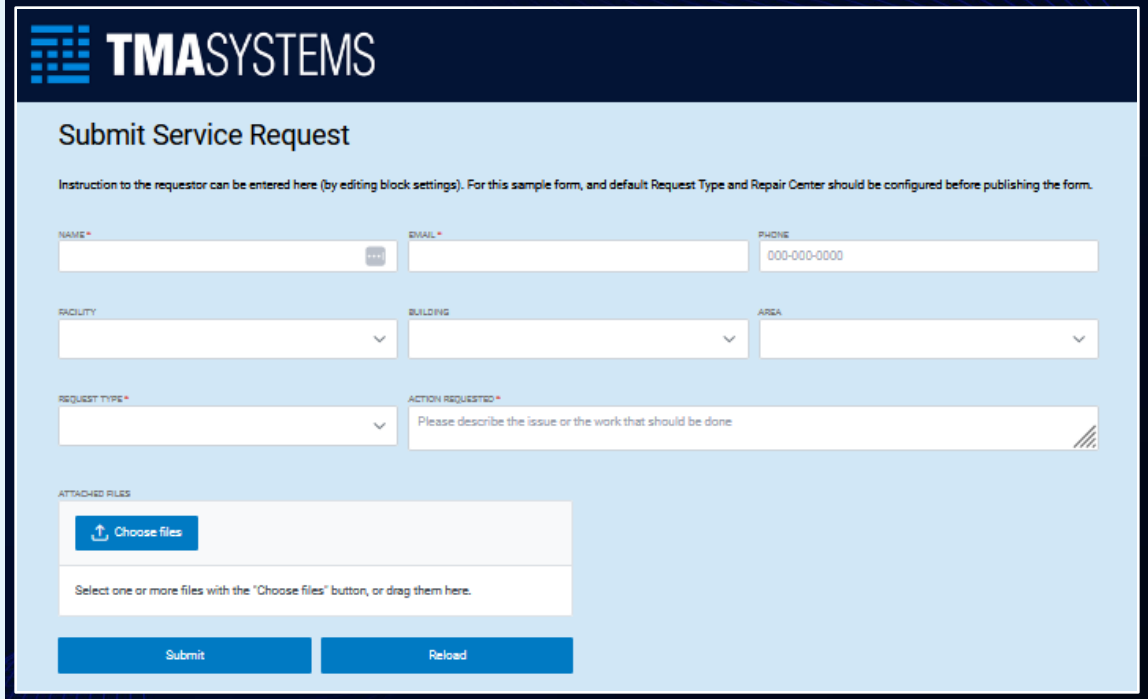
# Features & Capabilities

- Requestors receive an email with a status page link.
- Approvers receive an email with an approval page link.
- “Portals” can be designed and created as landing pages to direct requestors to multiple request forms.
- Automatic page responsiveness for use on phones, tablets, laptops, etc.
- Additional branding capability with an overall improved look and feel.
- Ability to attach more than one file to a request.

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# Components

- Themes: A theme is required before you can create a Form and is used to establish the appearance of your Form with customizable fonts, colors, etc.
- Forms: The pages created for customers and stakeholders to input maintenance requests, check status, receive confirmation that their request was received, and more.
- Portals: Used to create a landing page for your clients. Forms that have been created can then be added and gives the users instructions, as well as a Reload button and SSO Login button.
- Searches: Pages used to create a window in which requestors can search for their requests.
- Logins: When using SSO, rather than anonymous access, use the SSO Login page to design a custom login window, rather than forcing users to the TMA login window.

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# Getting Started

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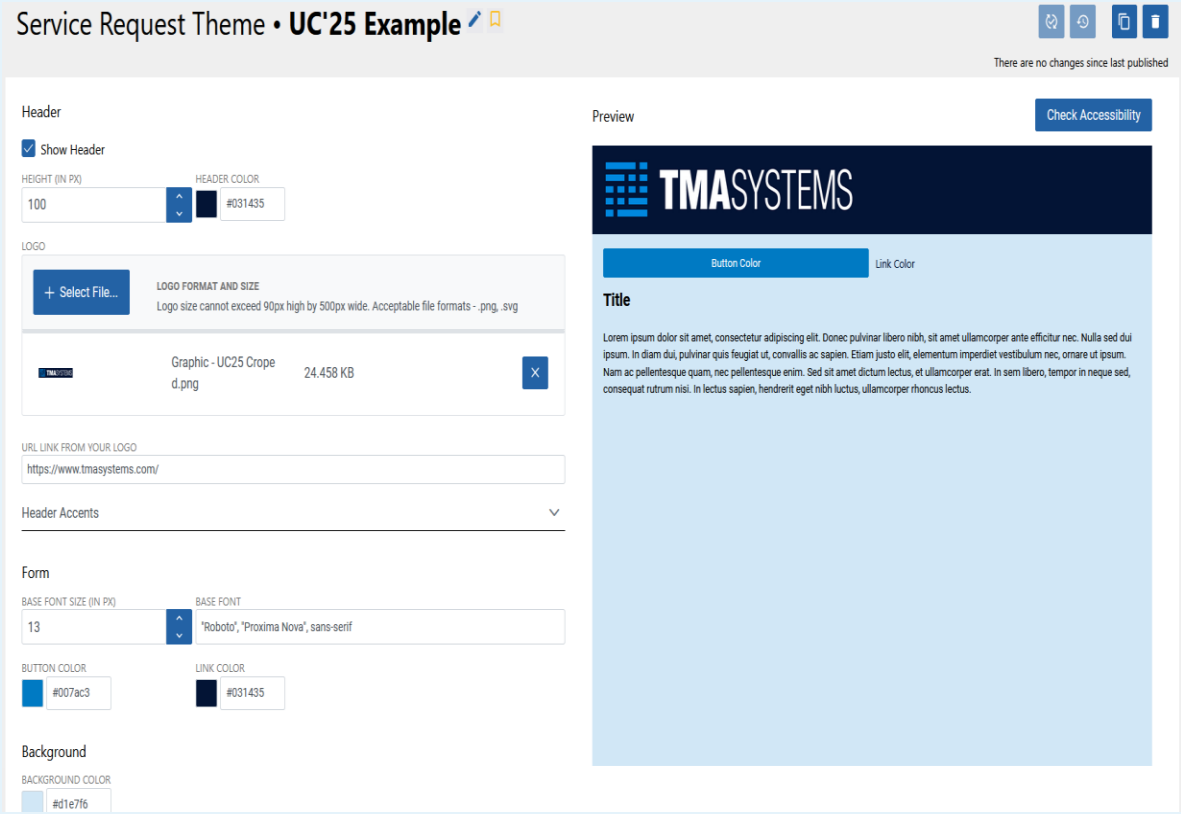
# Understanding the Portal

## First Steps

1. Decide what features/functions to give to customers
    a. Do you want the capability of searching for a status?
    b. What information do you want visible?
    c. What data will be required to create a request?
2. Create a Theme
    a. Request Forms, Portal Landing Pages, Search Pages, etc. all derive from the same Theme.
    b. By creating multiple design Themes, each Request Form created can be unique.

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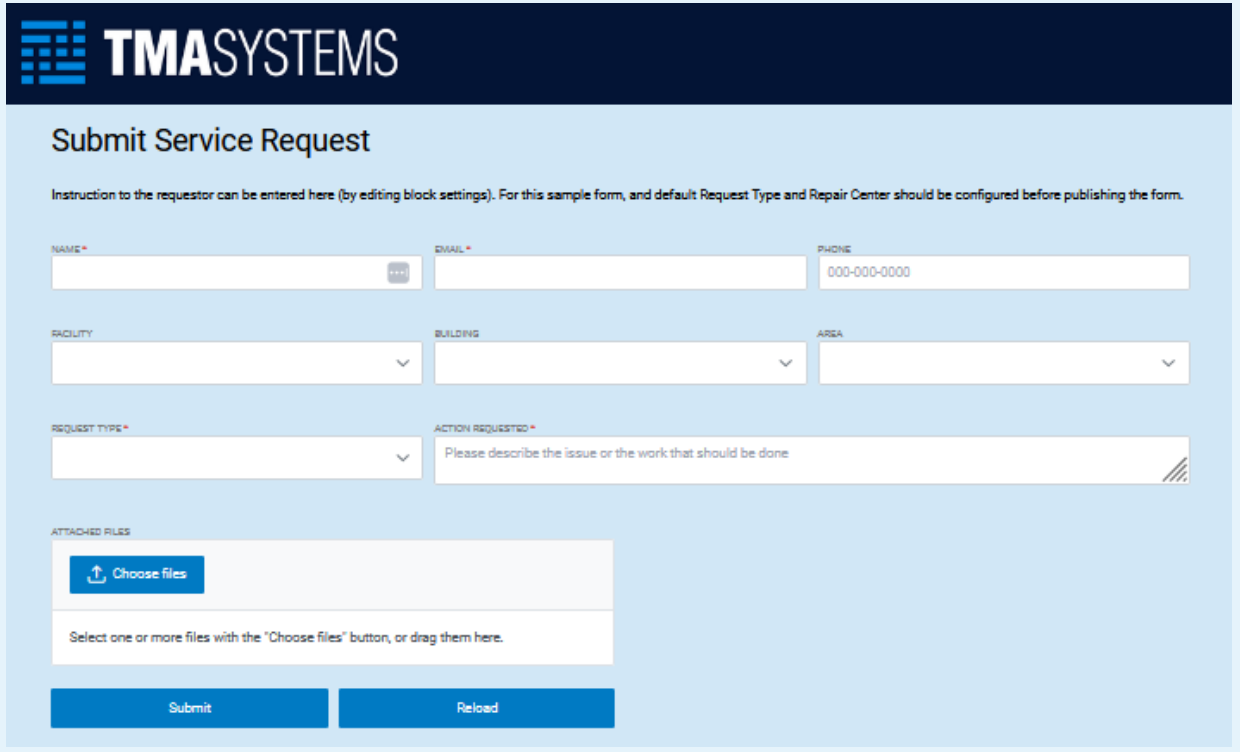
# Creating the Request Form

## Full Control

- Choose from Service Request or Material Request Forms
- Custom Branding/Logo
- Custom Text
- Almost 40 data fields available to add
- Add Background Images
- Anonymous Access or Single Sign On (SSO)

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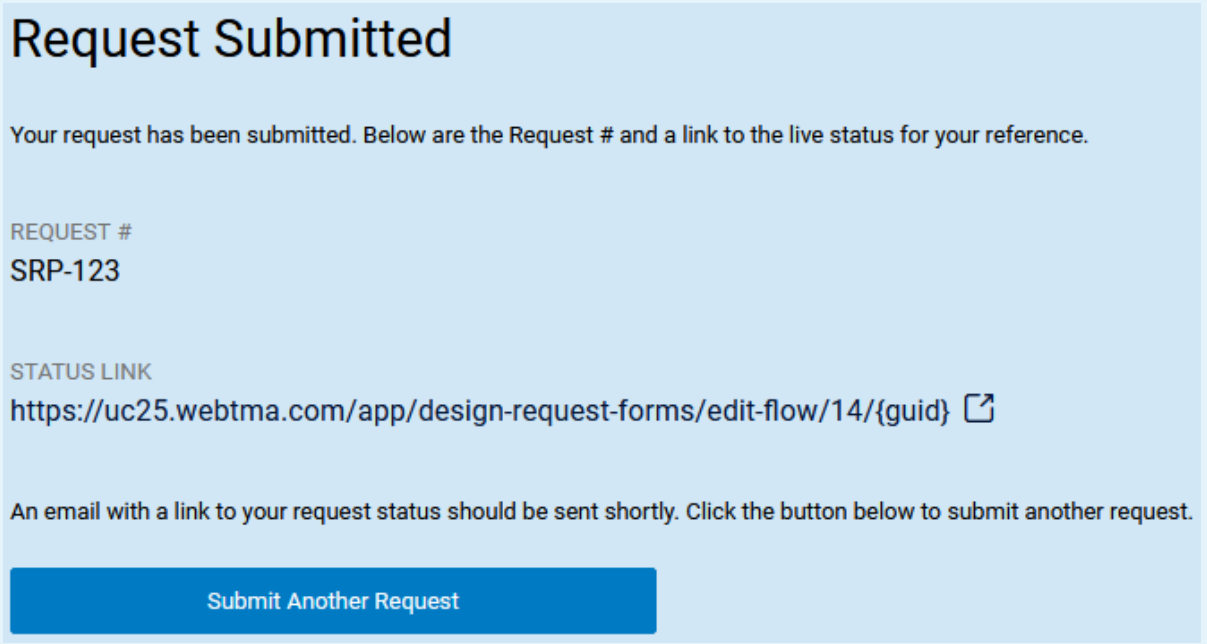
# Creating the Request Form

## Confirmation and Status

- Once a request page has been created, additional pages can be developed to provide customers with confirmation of their request and a link to check the status.
- The link provided in the Request Confirmation is unique to that request and work order and can be used at any time.
- In the event of an error, when submitting a request or checking the status, error pages can also be created.

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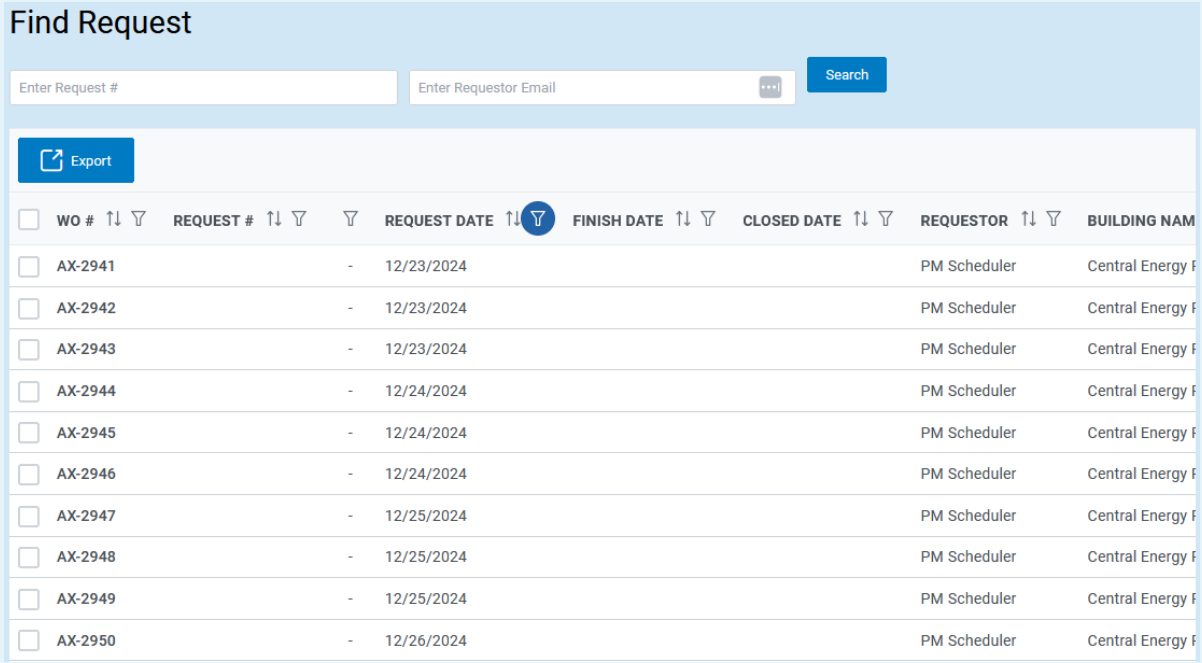
# Service Request Search

## Find Request Status

- A page can be created to allow customers to search for the status of their request by entering the Request # or WO #, and their email address.
- Choose from almost a dozen data fields, including a *Work Order Cost Summaries* graph that allows the user to view a table of work order cost summaries.

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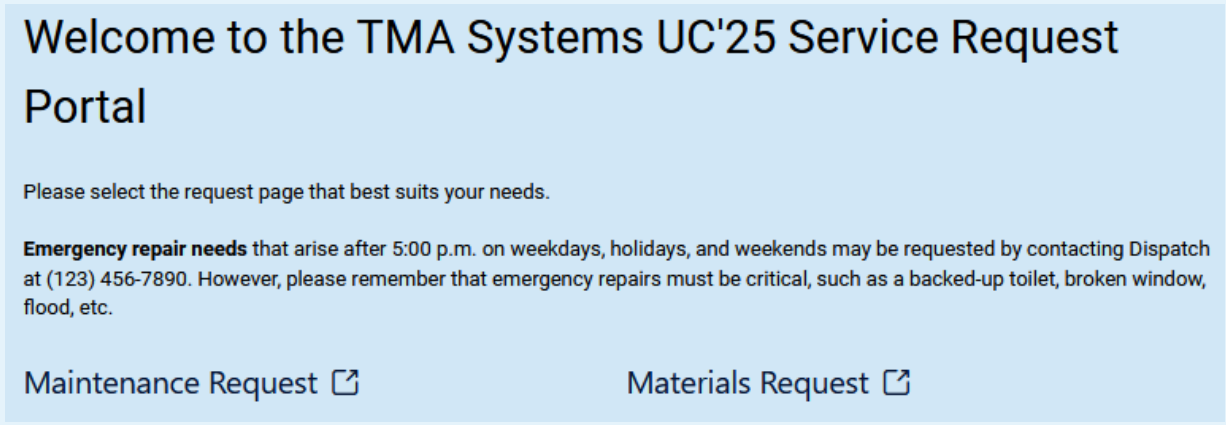
# Portal Pages

## Creating "Landing" Pages

- Portal, also known as landing, pages can help navigate customers to different request links.
- For example, a university may have one landing page with multiple locations listed; whereas, a hospital may use one landing with multiple clinics and hospitals in a certain area.
- Alternatively, a portal page can be created with links for maintenance requests, project requests, key requests, etc.

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# Thank You / Q&A

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