



UC25 | April 8th - 10th 2025

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





## Mackenzie Soap

CSM Team Lead, TMA Systems  
*mackenzie.soap@tmasystems.com*

---

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.





## Eric Szlezak

CMMS Admin Services Team Lead, TMA Systems

*eric.szlezak@tmasystems.com*

---

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.





# Agenda

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





# Introduction



# 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

Service Request Form • UC'25 Service Example  

<https://uc25.webtma.com/app/request/668202f4-a83b-4226-bdae-6640a2507e03> 

Submission Confirmation Status Submission - Error Status - Not Found

There are no changes since last published  

### Submit Service Request

Instruction to the requestor can be entered here (by editing block settings). For this sample form, and default Request Type and Repair Center should be configured before publishing the form.

NAME *	EMAIL *	PHONE
<input type="text"/>	<input type="text"/>	<input type="text" value="000-000-0000"/>
FACILITY	BUILDING	AREA
<input type="text"/>	<input type="text"/>	<input type="text"/>
REQUEST TYPE *	ACTION REQUESTED *	
<input type="text"/>	<input type="text" value="Please describe the issue or the work that should be done"/>	

Keyword

TEXT AND IMAGES ^

- TITLE ▾
- PARAGRAPH ▾
- RICH TEXT ▾
- EXTERNAL IMAGE ▾

BUTTONS ^

- SUBMIT BUTTON ▾
- RELOAD BUTTON ▾

LINKS AND ATTACHMENTS ^

- FILE UPLOAD ▾
- FORM/PORTAL LINK ▾

REQUESTOR ^

- REQUESTOR NAME ▾
- REQUESTOR EMAIL ▾
- REQUESTOR PHONE ▾

ORGANIZATION ^

- ACCOUNT ▾
- REPAIR CENTER ▾
- DEPARTMENT ▾

REQUEST DETAILS ^



# 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.

## Welcome to the TMA Systems UC'25 Service Request Portal

Please select the request page that best suits your needs.

**Emergency repair needs** that arise after 5:00 p.m. on weekdays, holidays, and weekends may be requested by contacting Dispatch at (123) 456-7890. However, please remember that emergency repairs must be critical, such as a backed-up toilet, broken window, flood, etc.

[Maintenance Request](#)

[Materials Request](#)



### Submit Service Request

Instruction to the requestor can be entered here (by editing block settings). For this sample form, and default Request Type and Repair Center should be configured before publishing the form.

NAME \*  EMAIL \*  PHONE

FACILITY  BUILDING  AREA

REQUEST TYPE \*  ACTION REQUESTED \*

ATTACHED FILES

[Choose files](#)

Select one or more files with the "Choose files" button, or drag them here.

[Submit](#) [Reload](#)



# 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.





# Getting Started



# 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.

Service Request Theme • UC'25 Example

There are no changes since last published

Check Accessibility

### Header

☒ Show Header

HEIGHT (IN PX) 100

HEADER COLOR #031435

### LOGO

+ Select File...

LOGO FORMAT AND SIZE  
Logo size cannot exceed 90px high by 500px wide. Acceptable file formats - .png, .svg

Graphic - UC25 Croke d.png 24,458 KB

URL LINK FROM YOUR LOGO  
https://www.tmasystems.com/

### Header Accents

### Form

BASE FONT SIZE (IN PX) 13

BASE FONT "Roboto", "Proxima Nova", sans-serif

BUTTON COLOR #007ac3

LINK COLOR #031435

### Background

BACKGROUND COLOR #d1e7f6

### Preview

Button Color Link Color

#### Title

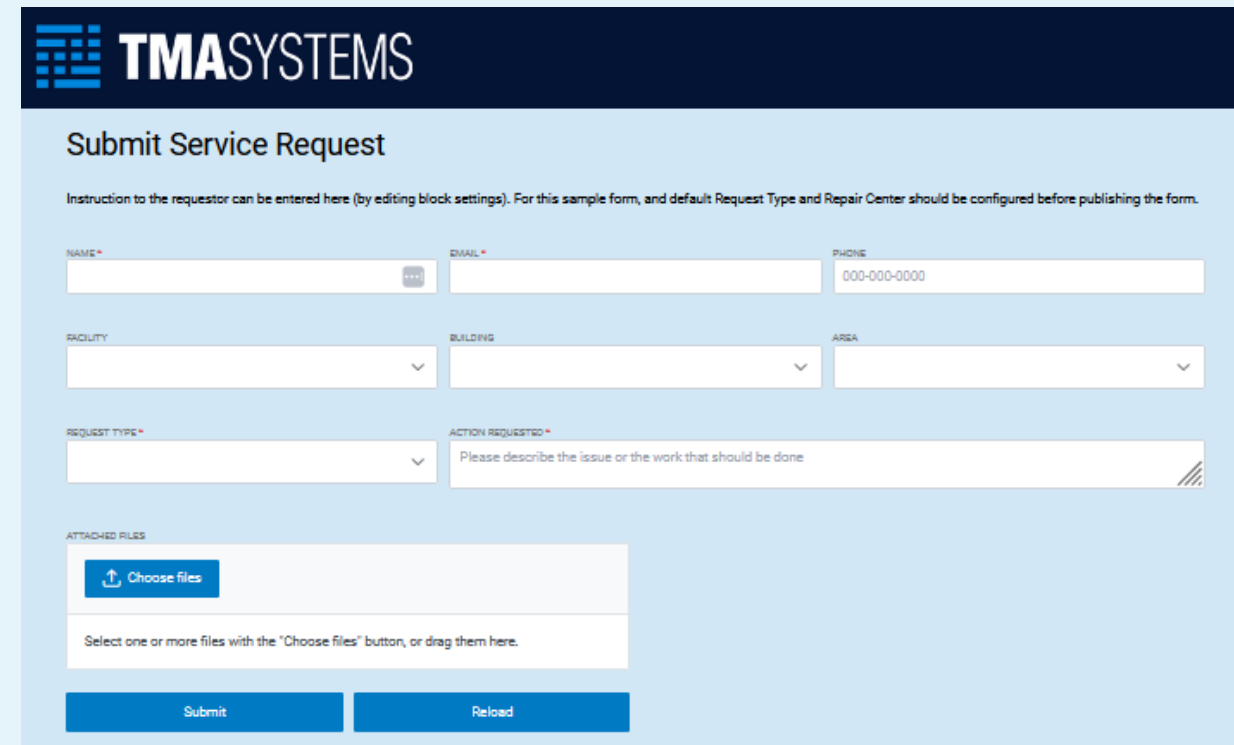
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec pulvinar libero nibh, sit amet ullamcorper ante efficitur nec. Nulla sed dui ipsum. In diam dui, pulvinar quis feugiat ut, convallis ac sapien. Etiam justo elit, elementum imperdiet vestibulum nec, ornare ut ipsum. Nam ac pellentesque quam, nec pellentesque enim. Sed sit amet dictum lectus, et ullamcorper erat. In sem libero, tempor in neque sed, consequat rutrum nisi. In lectus sapien, hendrerit eget nibh luctus, ullamcorper rhoncus lectus.



# 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)



The screenshot displays the 'Submit Service Request' form within the TMA SYSTEMS interface. The form is set against a light blue background with a dark blue header containing the TMA SYSTEMS logo. Below the header, the title 'Submit Service Request' is followed by an instruction: 'Instruction to the requestor can be entered here (by editing block settings). For this sample form, and default Request Type and Repair Center should be configured before publishing the form.'

The form fields are organized as follows:

- NAME**: A text input field with a small icon on the right.
- EMAIL**: A text input field.
- PHONE**: A text input field with the placeholder '000-000-0000'.
- FACILITY**: A dropdown menu.
- BUILDING**: A dropdown menu.
- AREA**: A dropdown menu.
- REQUEST TYPE**: A dropdown menu.
- ACTION REQUESTED**: A text area with the placeholder 'Please describe the issue or the work that should be done'.
- ATTACHED FILES**: A section with a 'Choose files' button and a note: 'Select one or more files with the "Choose files" button, or drag them here.'

At the bottom of the form are two buttons: 'Submit' and 'Reload'.



# 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.

## Request Submitted

Your request has been submitted. Below are the Request # and a link to the live status for your reference.

REQUEST #  
SRP-123

STATUS LINK  
<https://uc25.webtma.com/app/design-request-forms/edit-flow/14/{guid}> 

An email with a link to your request status should be sent shortly. Click the button below to submit another request.

Submit Another Request



# 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.

### Find Request

<input type="checkbox"/>	WO # ↑↓ ▾	REQUEST # ↑↓ ▾	REQUEST DATE ↑↓ ▾	FINISH DATE ↑↓ ▾	CLOSED DATE ↑↓ ▾	REQUESTOR ↑↓ ▾	BUILDING NAM
<input type="checkbox"/>	AX-2941	-	12/23/2024			PM Scheduler	Central Energy F
<input type="checkbox"/>	AX-2942	-	12/23/2024			PM Scheduler	Central Energy F
<input type="checkbox"/>	AX-2943	-	12/23/2024			PM Scheduler	Central Energy F
<input type="checkbox"/>	AX-2944	-	12/24/2024			PM Scheduler	Central Energy F
<input type="checkbox"/>	AX-2945	-	12/24/2024			PM Scheduler	Central Energy F
<input type="checkbox"/>	AX-2946	-	12/24/2024			PM Scheduler	Central Energy F
<input type="checkbox"/>	AX-2947	-	12/25/2024			PM Scheduler	Central Energy F
<input type="checkbox"/>	AX-2948	-	12/25/2024			PM Scheduler	Central Energy F
<input type="checkbox"/>	AX-2949	-	12/25/2024			PM Scheduler	Central Energy F
<input type="checkbox"/>	AX-2950	-	12/26/2024			PM Scheduler	Central Energy F





# 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.

## Welcome to the TMA Systems UC'25 Service Request Portal

Please select the request page that best suits your needs.

**Emergency repair needs** that arise after 5:00 p.m. on weekdays, holidays, and weekends may be requested by contacting Dispatch at (123) 456-7890. However, please remember that emergency repairs must be critical, such as a backed-up toilet, broken window, flood, etc.

[Maintenance Request](#) ↗

[Materials Request](#) ↗





# Thank You / Q&A

[mackenzie.soap@tmasystems.com](mailto:mackenzie.soap@tmasystems.com) | [tmasystems.com](https://tmasystems.com)

UC  
25 YEARS  
OF COMMUNITY, PARTNERSHIP, AND GROWTH