



Customer Portal Guide

Everything you need to manage your teams,
documents, and requests in one place.

Asset Manager

Reports

Download center

Pickups

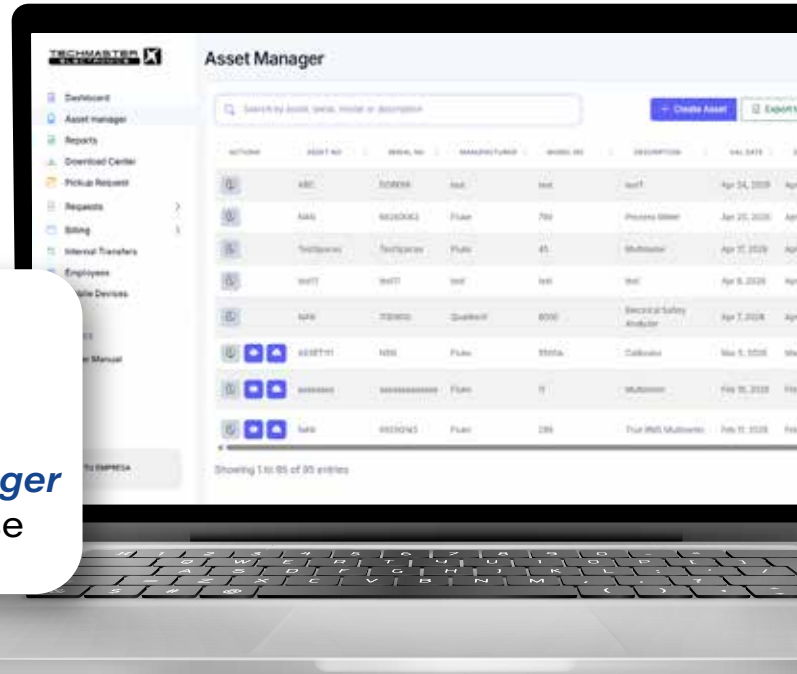
Request/Tickets

Purchase Orders

Additional Resources



Customer Portal Guide



1 Go to 'Asset Manager' from the left menu.

2 Use the search bar to find assets by Asset Number, Serial Number, Model or Description.

3 Click 'Choose Columns' to customize which fields are displayed.

4 Locate an asset row to access available actions.

KEYNOTES

Download (cloud/download icon): Download the certificate/report to your device.



Preview (eye icon): Open and review the latest certificate/report directly in the portal.

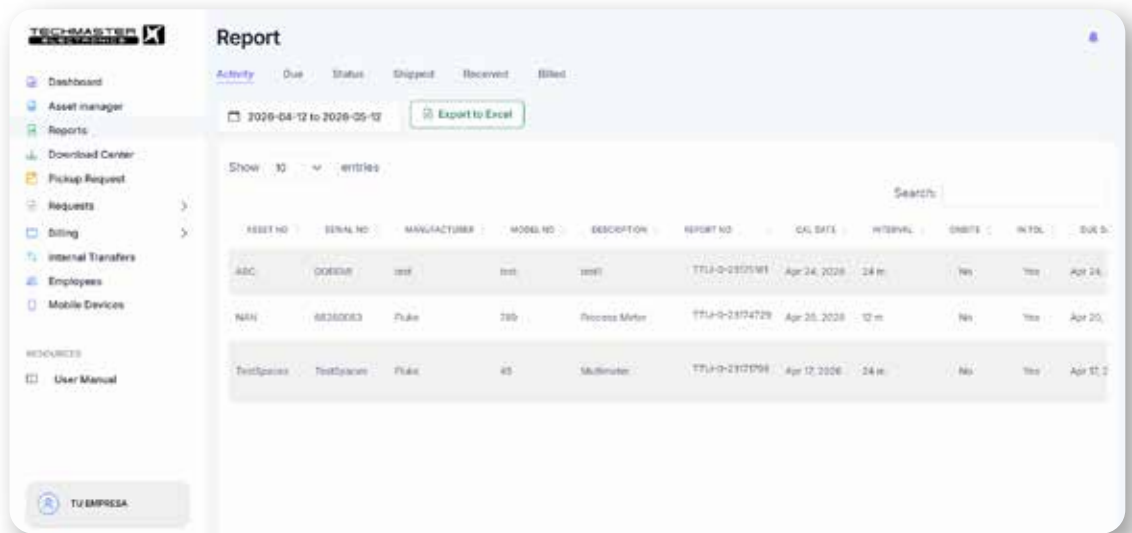


History (clock icon): View full calibration history and all certificates for the selected asset.





Reports
Generate Reports



1 Go to 'reports!'

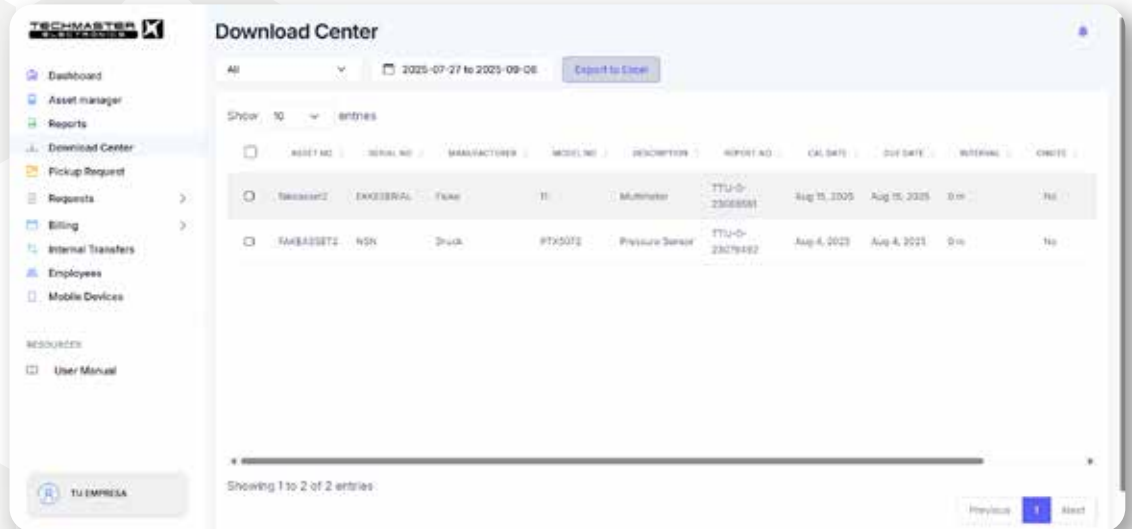
2 Select a tab (Activity, Due, Status, etc.)

3 Choose a date range using the calendar.

4 Click to 'Export to Excel' to download.



Download center
Bulk Downloads



1 Go to 'Download center!'

2 Select a status (e.g. Pending Download).

3 Choose a date range.

4 Select assets using checkboxes.

5 Download documents or export data.



Requests
Submit a
Ticket

CREATED ON	CONTACT	CATEGORY	DESCRIPTION
May 11, 2026	Pedro Fernandez	Pickup request	venir por equipo
May 11, 2026	Pedro Fernandez	Pickup request	XXXXXX
Apr 16, 2026	Pedro Fernandez	Pickup request	prueba 4 sistema
Apr 16, 2026	Pedro Fernandez	Pickup request	prueba 3 sistema
Apr 16, 2026	Pedro Fernandez	Pickup request	PRUEBA SISTEMA
Apr 16, 2026	Pedro Fernandez	Pickup request	Prueba de Dete
Mar 27, 2026	Pedro Fernandez	Request component assembly/panel/Custom change	PRUEBA 4 de S.
Mar 27, 2026	Pedro Fernandez	Pickup request	Prueba 1 sistema

1 Go to
'Requests' > 'Tickets.'

2 Select a
category.

3 Enter subject
and description.

4 Click 'Send.'



**Scheduling
a Pickup**

CREATED ON	CONTACT	CATEGORY	DESCRIPTION
May 11, 2026	Pedro Fernandez	Pickup request	venir por equipo Fluke 117
May 11, 2026	Pedro Fernandez	Pickup request	XXXXXX
Apr 16, 2026	Pedro Fernandez	Pickup request	prueba 4 sistema
Apr 16, 2026	Pedro Fernandez	Pickup request	prueba 3 sistema
Apr 16, 2026	Pedro Fernandez	Pickup request	PRUEBA SISTEMAS #2
Apr 16, 2026	Pedro Fernandez	Pickup request	Prueba de Sistemas
Mar 27, 2026	Pedro Fernandez	Pickup request	Prueba 1 Sistema... IGNORAR
Mar 27, 2026	Pedro Fernandez	Pickup request	Ticket de PRUEBA. Favor de IGNORAR

1 Go to
'Scheduling'
> 'Pickup.'

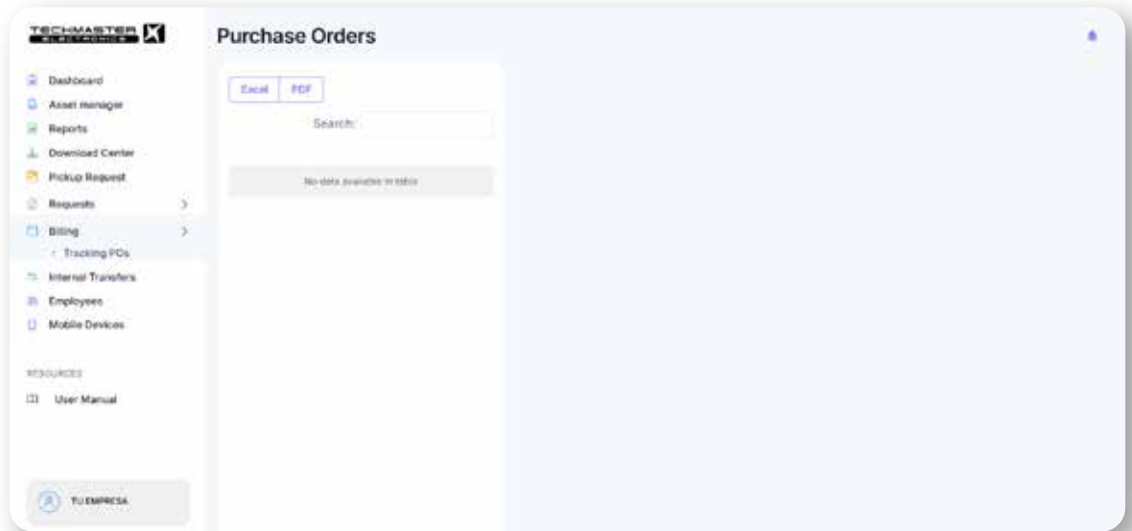
2 Select a
Scheduling
tab.

3 Search for assets,
select them and
Click 'Schedule.'

4 Add additional comments
and attach relevant files and click
'Save changes' to submit.



Billing
Purchase Orders



1 Go to 'Billing' > 'Tracking POs'!

2 Review PO amounts, invoiced totals, and remaining balances.


3 Export to Excel or PDF as needed.



Additional Resources

1. Go to the User Menu (bottom left corner).
2. Access 'Quality' documents such as ANAB certificates.
3. Download quality documents and compliance certificates as needed.
4. Use 'Web Users' view to manage and review user access.
5. Switch site using the dropdown in case of multi-site setup.

DOCUMENT

 ANAB Certificate


RESOURCES

 User Manual


Signed in as

TU EMPRESA

 Web users

 Quality

 Logout

 TU EMPRESA