

DATA SHEET

# Source Central Portal

Source Support Services' services management platform, called Source Central, is a powerful software application that unifies and automates Source's services, and in turn our customers' capabilities and technical product service delivery processes. With its unique integration and automation capabilities, Source Central manages and automates service activity including a large-scale global field service network, a training and certification program, detailed case process management and the ability to manage the delivery, management and recovery of parts.

While Source Central integration is crucial to ensuring accuracy of data and case automation processes, Source provides additional user-focused, self-service features that are only available through the Source Central Portal. These features serve to benefit your teams and can, with available customization, be configured and customized for use with your customers.

The Source Central Portal enables users to track and manage every service that Source provides in a clean, easy-to-navigate format. Through the Portal, you can provide your teams with easy access to information that is most relevant to them. For example, your finance team can view past billing information and your support team can track and manage ongoing cases in near-real time.



*Self-service features to track & manage every service that Source provides*



*Personal user accounts with desktop and mobile access*



*Brand customization & "child" portals enable end-users to submit cases via self-service portal*

Depending on your business requirements, you may choose from the following pre-designed Source Central portal classifications:

- In the **Standard Portal**, users can submit cases, view near real time status updates for ongoing cases, and review case notes and documentation.
- The **Advanced Portal** adds additional logistics management capabilities through logistics documentation and status updates.
- If desired, Source can develop a **Customized Portal** experience to better suit your business needs. Customization includes branded dashboards, secured end-user access, an increased number of user licenses, and integration capabilities beyond the standard portal offering.

## Core Source Central Portal Features & Functions

	Source Central Portal		
	Standard	Advanced	Custom
Desktop & Mobile Access	✓	✓	✓
Account Profile (Name, Address, Contact, etc.)	✓	✓	✓
Case Management (Supported Event)	✓	✓	✓
Entitlement (Specific Asset Information)	✓	✓	✓
Reports (Stock and Customer Overview of Partner Data)	✓	✓	✓
Dashboards (Visualization of Overall Data)	✓	✓	✓
Logistics (Inventory, Locations, Sales Order, Transfer Orders, etc.)		✓	✓
Custom Branding (Customer Logo, Brand Colors, URL, etc.)			✓
Child Portals (End-User Access)			✓

### Desktop & Mobile Access



Each Source Central Portal user is given a personal username and password to access the Portal via desktop or mobile. With our Custom Portal Services, you have access to a custom branded URL so the only brand your customers will see on the portal is your own.



### Account Profile

Approved users can view and manage their service operations with Source through the Account Profile. This includes services that Source delivers on your behalf and account contact information.

### Case Management



Through the Source Central Portal, you can track and manage every case that Source manages on your behalf. Portal users have access to view case information (End-User site location, SLA, the assigned field service professional, part serial numbers, etc.) and case notes logged by our technical support team to ensure accurate service delivery and complete adherence to case processes and expectations.

### *Case Progression Meter*

Cases that require on-site service delivery feature an additional tracking component, called the Case Progression Meter. Each dispatch case, accessible via the Source Central Portal, presents a step-by-step tracker that displays progress on specified milestones required to complete the on-site service event on time to meet the SLA. Milestone tasks include items such as FE assignment, FE Check-in and Check-Out and each has a time-based trigger to track and flag items for completion to meet the SLA for that case.

When a task is completed, it is highlighted in green, when a task is nearing its deadline, it is highlighted in yellow, and if it has missed a deadline, it appears in red. Viewing this simple color-coded Case Progression Meter, Portal users can quickly glance at the dispatch case to determine if it is on track to meet SLA.

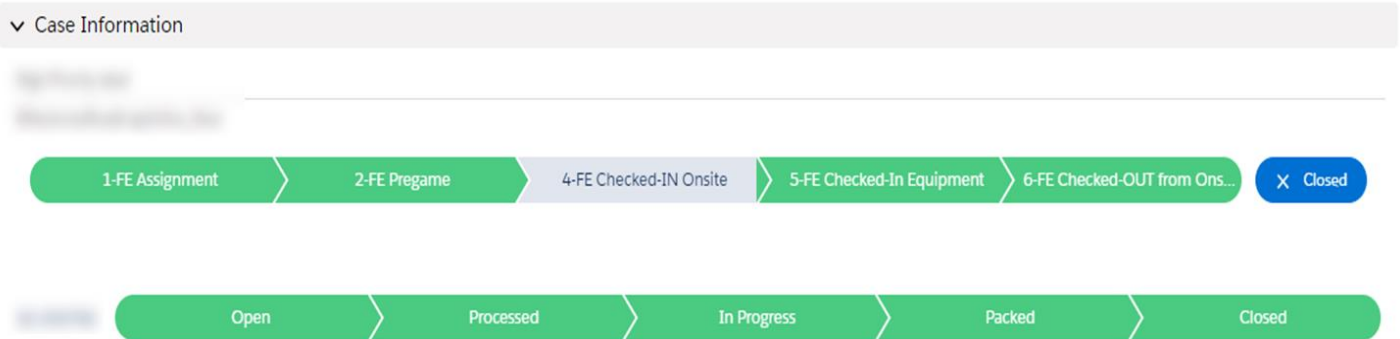


Figure 1: Sample Case Progression Meter



### Entitlement

Portal users can view active entitlements with Source including asset information such as serial number, SKU, and location.



### Reports & Dashboards

Reporting is also available via the Source Central Portal. Users can view and save near-real time overview reports of customer data. Portal users can customize their portal page view by creating new reports or editing and filtering existing reports. Source also supplies a snapshot of this data in a dashboard view for quick summary viewing.



### Logistics

The advanced portal includes additional logistics information. Users can view inventory reporting, active forward stocking locations around the globe, sales orders, transfer orders, and more.



### Brand Customization and “Child” Portals

The Source Central Portal can also be customized to your brand so that you can provide each of your customers with their own “child” portal environment that rolls up to your “parent” portal. Most commonly, Source customers leverage this capability to enable their end-users to submit service requests. Because the “child” portal is customized to your specifications, the end-user submitting the service request experiences only your brand while they interface with the portal. All cases submitted through the customized “child” portal will be directed to Source for efficient case response.

## Add-On Features

### Source Central Integrated Global Mapping Tool

As an additional option, Source can provide licenses and portal access to our global mapping tool. The mapping tool pulls live data from Source Central and maps the information for a visual view of customer entitlements, FE coverage, and/or nearby Forward Stocking Locations. Users can overlay multiple data points on the same map, insert a distance or travel time radius around a specific address, and personalize map points to best fit their requirements.



*Figure 2: Sample Mapped Points from Integrated Mapping Tool*

The Source Central Portal enables you to review, track, and manage the health and status of all your services with Source. The clean, user-focused interface makes it easy for your teams to find and access the information they need, and with available customization, you can activate “child” portals to streamline case requests directly from your end-user.

Contact us today to schedule a live demonstration:

[sales@sourcesupport.com](mailto:sales@sourcesupport.com)

+1 678-835-6100