General Information

Welcome to Systel's e-info service. The e-info service provides our customers the ability to manage their equipment online. Through the webpage provided, you can accomplish a number of equipment management tasks. You can do any of the following:

- Obtain pertinent account information
- View service information
- View equipment information
- Place service calls online
- View meter information
- Input meter readings
- Place orders online
- View order information

Each area of e-automate has its own tile on the homepage. You access all tasks from the area's tile.

You must have Microsoft® Internet Explorer® 9.0 or newer, Firefox® 17 or newer, or Chrome 23 or newer to open e-info.

Quick Tips & Shortcuts

Logging In

To login, do the following:
1. From a browser, Go to www.systeloa.com and click on the E-Info Access Portal.
2. In the **User** field, enter the email address used to set-up web access.
3. In the **Password** field, enter the password provided to you. This is a case-sensitive field.
4. Click [**Login**] to enter the Customer Home Page.

Logging In (Multiple Locations)

If your company has multiple locations, you can be signed in under one login and switch locations to place service calls, and view and order supplies for equipment for any location registered under the master account.

With e-info you have the ability to give a user access to more than one location. That user will have the ability to perform equipment management tasks, for which they have rights, for the locations to which they have access. For example, if given the proper rights, you can place orders for multiple company locations.

If given the proper rights, a user may also login as the Master location. Logging in as the Master Location allows the user to perform activities in the **Service**, **Equipment**, and **Meters** areas of e-info for all your company's child locations. To give a user the ability to log in to more than one location, please email support@systeloa.com.

To login to a different location, do the following:
1. Click [**Login**]. You will be redirected to the **Switch Location** page.

2. Select the location to which you want access. A green checkmark displays in the box to the left of the location and you are automatically redirected to the selected customer's e-info homepage.
3. You can switch locations at any time from the customer's e-info homepage by clicking [**...**] located at the top of the page to the right of the company name and address.

Editing Your Profile

You can edit your profile via the **User settings** tile in the bottom right corner of the customer homepage.
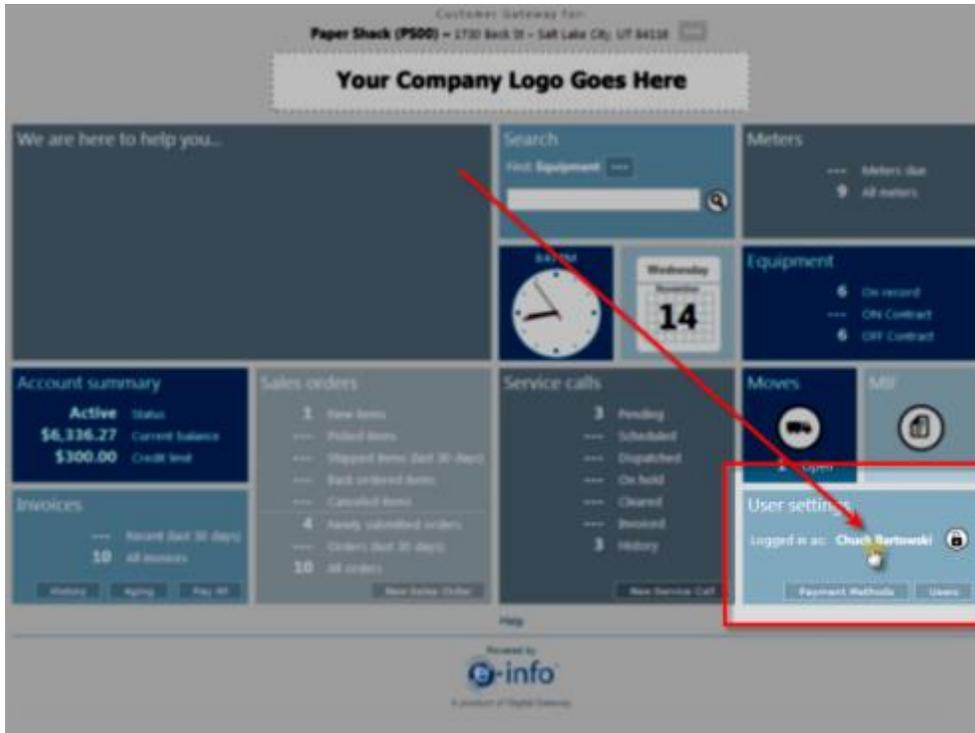
To edit your profile, do the following:
1. From the e-info customer homepage locate the **User settings** tile.
2. Click on your name. The **User Profile** page displays.

3. Make the necessary changes in the **Contact information** region.
4. Make the necessary changes in the **Address** region.
5. If you want to change your password, do the following.
   a. In the **Password** region, check the **Change password** checkbox to display the password fields.

b. In the **Current password** field, enter your current password.
c. In the **New password** field, enter the password you want for logging in to e-info.
d. In the **Confirm password** field, reenter the password you entered in the **New password** field.
6. Click [**Save**]. You will be redirected back the e-info home page.

Meters

The Meters area is where you find meter information for all equipment you have on record in our e-automate database as well as entering meter readings. The Meters area is accessed from the e-info homepage through the Meters tile.

From the Meters tile you can:
- View a list of meters that are due
- View a list of all meters
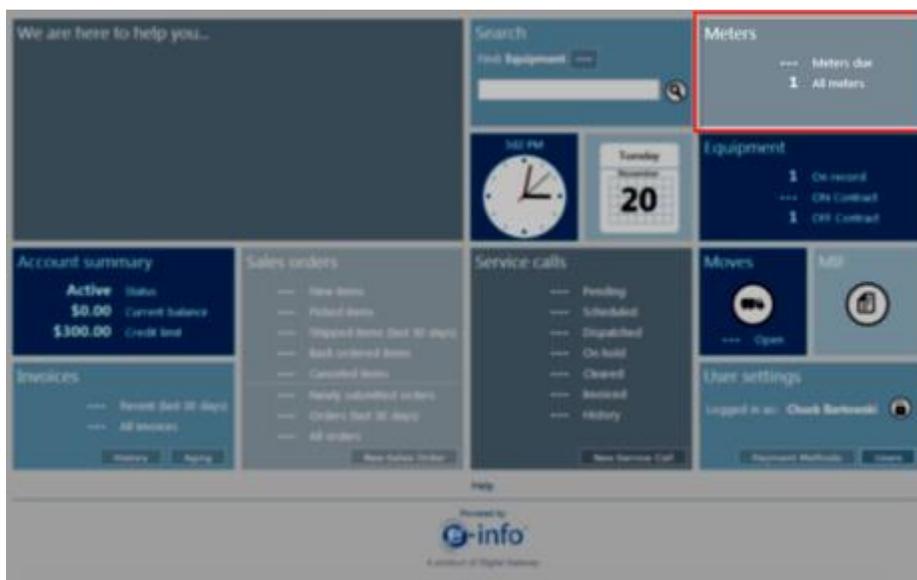
Entering Meter Readings

You may enter new meter readings through the Meters tile. To enter meter readings, do the following.
1. From the **Meters** tile, click on one of the following.
   Meters due: Displays only those equipment that have meters due and the equipment's previous meter information.

All meters: Displays all your equipment with your meter reading information.
Note: If you want to locate a specific meter you may do so through the **Search** tile. See the
Searching for Meters subtopic under the **Meters** topic.

The **Meter Reading** page displays.

2. Locate the equipment for which you want to enter a reading.
3. The meter reading date defaults to the current day. If you want to change the meter date click
   the [...] button next to the **Meter reading date** and select the desired date.
4. In the **New Reading** column, enter the new meter reading.

5. Click [**Save**].

   E-info will automatically validate the meter reading and display the validation status in the **Meter Validation Message** column.

6. If you want to perform other tasks pertaining to the equipment listed on the **Meter Reading** page, click on the equipment number.
7. Otherwise click **[Save]** to save the meter reading you entered and to be redirected to the e-info homepage.

Equipment

From the Equipment summary area you can view all your equipment information, as well as perform a variety of equipment related tasks. From the Equipment summary area you can enter meter readings, enter service calls, and order supplies for your machines. To locate the equipment you can choose from a list of equipment that are on record, a list of equipment that are currently on a contract, and a list of equipment that are not under a contract. You may also locate a specific piece of equipment by using the Search function. See the **Searching for Equipment** subtopic under the **Search** topic for more information.

Placing Service Calls

Through the equipment area you have the ability to enter a service call for any of your equipment. To place a supply order, do the following.
1. Locate the equipment for which you want to place a service call by doing one of the following.

- From the Equipment tile click on one of the following.
  On record: Displays all your equipment we have on record in our e-automate database.
  ON contract: Displays a list of all equipment you have on contract in our e-automate database.
 **OFF contract**: Displays a list of all your equipment that is not currently on contract.
- Use the Search function to locate a specific piece of equipment. See the **Searching for Service Calls** subtopic under the **Search** topic below for more information.

2. The **Equipment** page opens displaying the list of equipment.

3. Click the equipment number of the equipment for which you want to enter a service call.

   The **Equipment information** page displays.
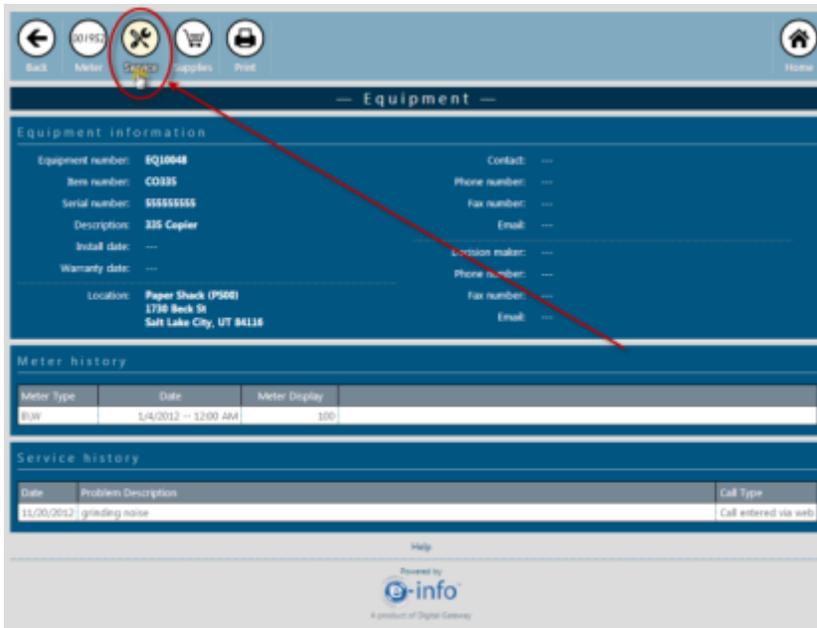
4. Click [**Service**]. The **New Service Call** page displays.

5. The Equipment you selected displays in the **Equipment** field. You may change the equipment by click the [**...**] button to the right of the equipment.

6. In the **Enter customer PO number (optional)** region, enter the customer PO number in the **Customer PO number** field. If the customer is required to have a PO on the customer record in e-automate, the PO number will also be required in e-info.

7. In the **Enter a description of the problem you are experiencing with the equipment** region, enter a description of the issue in the **Description** field.

8. Click [**Save**] to add the call and return to the **Service Calls** window.

Entering Meter Readings

To enter meter readings for your equipment, do the following:
1. Locate the equipment for which you want to enter meters by doing one of the following.
   - From the Equipment tile click on one of the following.
     On record: Displays all your equipment we have on record in our e-automate database.
     ON contract: Displays a list of all equipment you have on contract in our e-automate database.
     OFF contract: Displays a list of all your equipment that are not currently on contract.

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- Use the Search function to locate a specific piece of equipment. See the **Searching for Meters** subtopic under the **Search** topic for more information.

The **Equipment** page opens displaying the list of equipment.

2. Click the equipment number of the equipment for which you want to submit meters.

The **Equipment** information page displays.
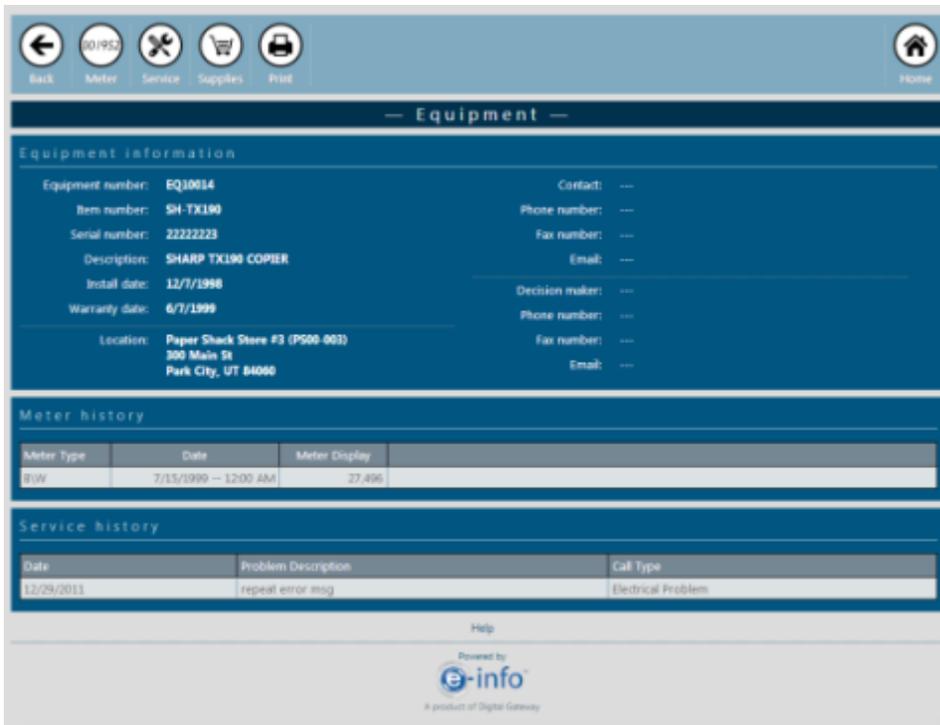
3. Click [**Meter**] located on the top left of the page.
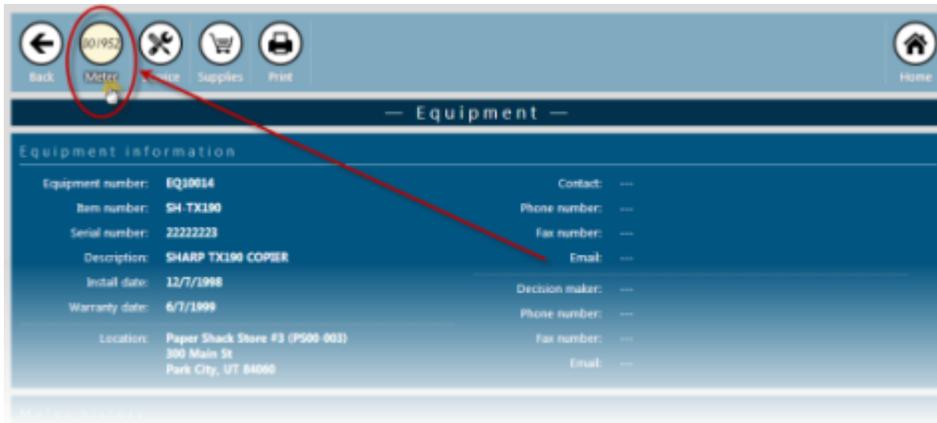
The **Meter Reading** page displays.

4. Follow the instructions for entering meters on Pages 8-10.

Placing Supply Orders

Through the equipment area you have the ability to enter a supply order for any of your equipment. When you are placing a supply sales order from the Equipment you are ordering the supplies by equipment to which they are associated. Doing so ensures you get the correct contract price for those supply items. To place a supply order, do the following.

1. Locate the equipment for which you want to order supplies by doing one of the following.
   - From the **Equipment** tile click on one of the following.
   On record: Displays all your equipment we have on record in our e-automate database.
   ON Contract: Displays a list of all equipment you have on contract in our e-automate database.
   OFF Contract: Displays a list of all your equipment that is not currently on contract.
   - Use the Search function to locate a specific piece of equipment. See the **Searching for Sales Orders** subtopic under the **Search** topic below for more information.

   The **Equipment** page opens displaying the list of equipment.

2. Click on the equipment number of the equipment for which you want to order supplies.

The **Equipment** information page displays.

3. Click [**Supplies**] located in the top left corner of the page.

The **Enter Item Quantity** window opens. If the equipment is on contract, this window lists the related items that are included in the bill code assigned to the contract. If the equipment is not on contract this window lists all the equipment's related items.

4. If you want to add any of the displayed items to the order, enter the desired quantity for each item you want on the order.

5. Click [**OK**]. The **New Sales Order** page displays with the items and the quantities you added to the sales order listed under the **Items included in this order** region.

The **Bill to** region displays the location that will be billed. You cannot edit the bill to location from this page.

The **Ship to** region displays the location to which the items on the sales order will be shipped.

6. If you want to select a different ship to location, do the following.
    a. Click the [**…**] button.

Selected	Location	Description/Attn	Number
✔	52 W Main Street Lehi, UT 84043	Paper Shack Store #2 Attn: Mary	PS00-002
	300 Main St Park City, UT 84060	Paper Shack Store #3 Attn: Margerie	PS00-003
	100 W 500 S Provo, UT 84601	Paper Shack Store #4 Attn: Matilda	PS00-004
	1730 Beck St Salt Lake City, UT 84116	Paper Shack	PS00
	730 S West Temple SLC, UT 84101	Paper Shack Store #1 Attn: Martha	PS00-001

Select Ship To Address — Cancel

    b. Select the location you want as the ship to location for this order. The **Select Ship To Address** window closes and the selected address now displays in the **Ship to** location region.
        Note: There will only be alternate locations to choose from if your company has multiple locations.
7. In the **Order information** region, enter the PO number in the **PO number** field.

8. In the **Order total** region, enter any comments you want on this order in the **Order comments** field.

9. If you want to add other items that are not under the equipment's contract, use the [**Add Items…**] button in the **Items included in order** region.

To add items not under contract to the order, do the following.

a. Click [**Add Items...**]. The **Find Items** window opens.

Tracking Shipped Items

If you want to track items from sales orders that have been shipped using a shipping method that provides tracking information, you can do so through the Sales orders tile

To track the items from an e-info sales order that have been shipped, do the following:
1. On the **Sales orders** tile, click one of the following categories by which you want to locate sales orders.
   New items: Displays a list of items recently ordered.
   Picked items: Displays a list of items that are picked and preparing for shipping. An item displays picked after a picking list has been generated for our warehouse.
   Shipped items (last 30 days): Displays a list of all **equipment** you do not have on contract in our e-automate database.
   Back ordered items: Displays a list of ordered items that are currently on back order.
   Canceled items: Displays items that have been canceled.
   Newly submitted orders: Orders that have been recently submitted.
   Orders (last 30 days): Orders places in the last 30 days.
   All orders: All orders that have been place through e-info.

   The **Sales order** page displays. The Sales order page lists all sales orders with items found under the category you selected. The image example below displays a list of items that on back order.

2. Click on the desired sales order number.

The **Sales order** page displays that gives sales order detail.

3. Scroll down and locate the **Shipments** region.

4. Click on the shipment number associated with the desired order.

The **Sales Order Shipment** page displays.

5. Locate the **Packages** region at the bottom of the page.
6. Under the **Package Number** column, click the tracking number assigned to the shipped item you want to track.
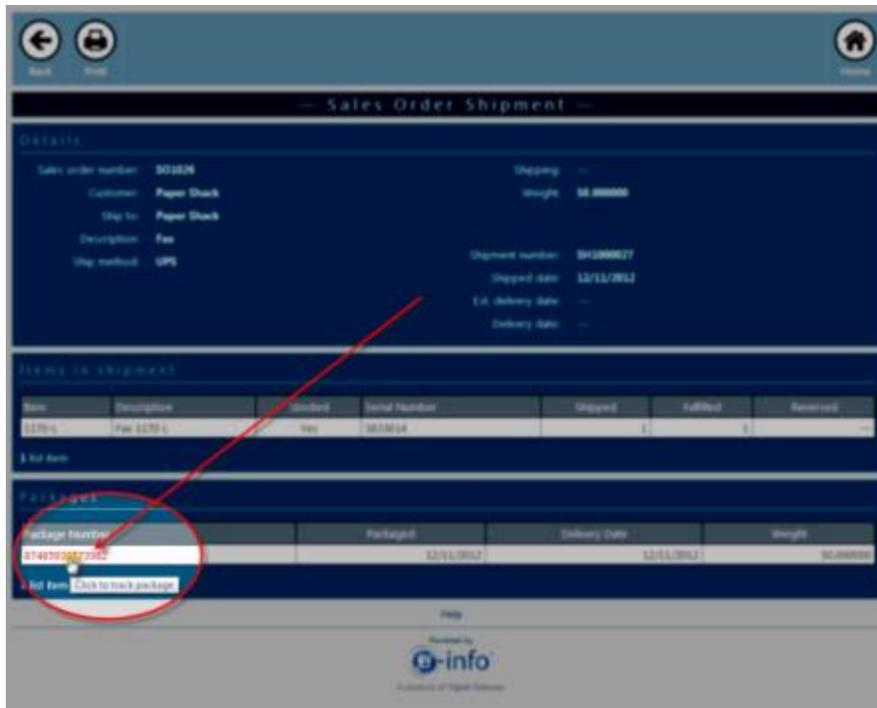
You are redirected to the tracking area of the shipping provider's website.