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Customer Portal Quick Start Guide

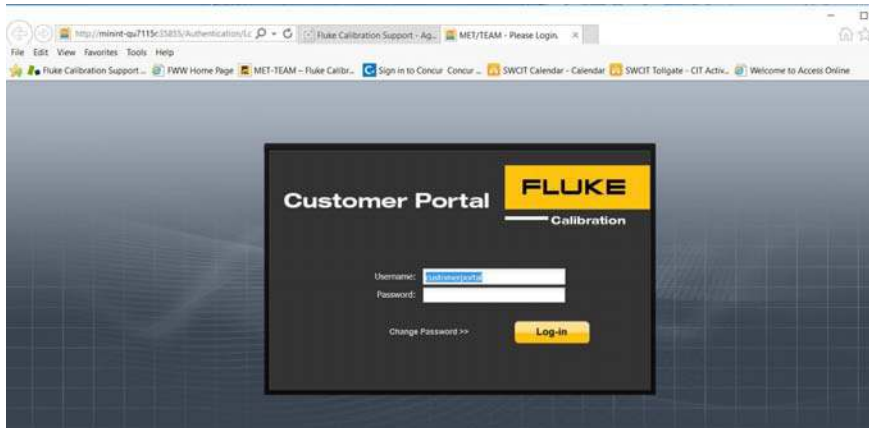

Andrew Chapman

April 07, 2017 14:02

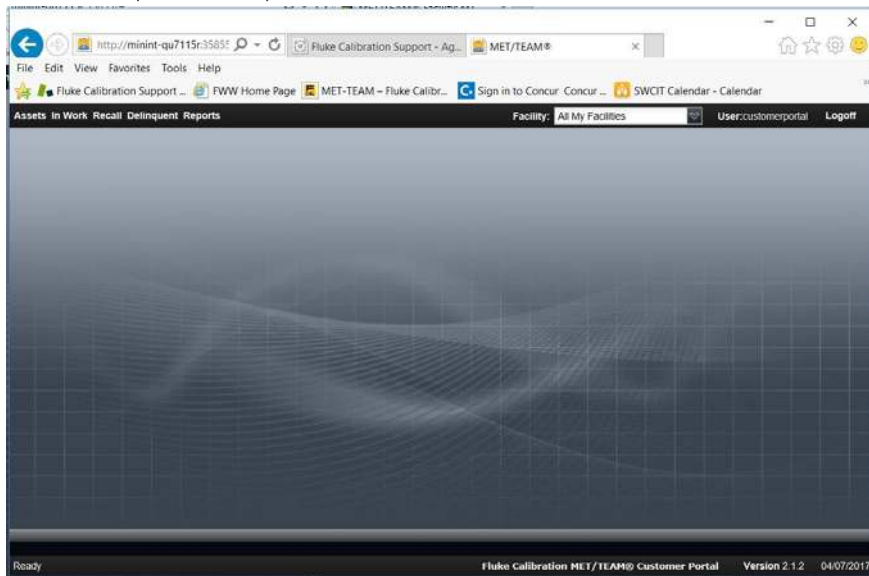
Customer Portal is an optional paid feature that can accompany the MET/TEAM website. Customer Portal is a separate website where a customer outside of the calibration lab (even outside of the company) can check on their own Assets and the Work Orders opened for their Assets, Reports, and Recall information. A good way to imagine the usability of Customer Portal is to think of it as a way to reduce customer calls into the calibration lab. If a customer had a question about when their Asset was due in for service, or if their Asset was submitted for service and they wondered how that service was going they can simply log in to Customer Portal to find that out.

To configure a new Customer Portal user, please see the following [article](#).

1. To access Customer Portal use the link provided to you by the cal lab or MET/TEAM administrator. Don't forget to bookmark this link!
2. Login with your Customer Portal Username and Password.



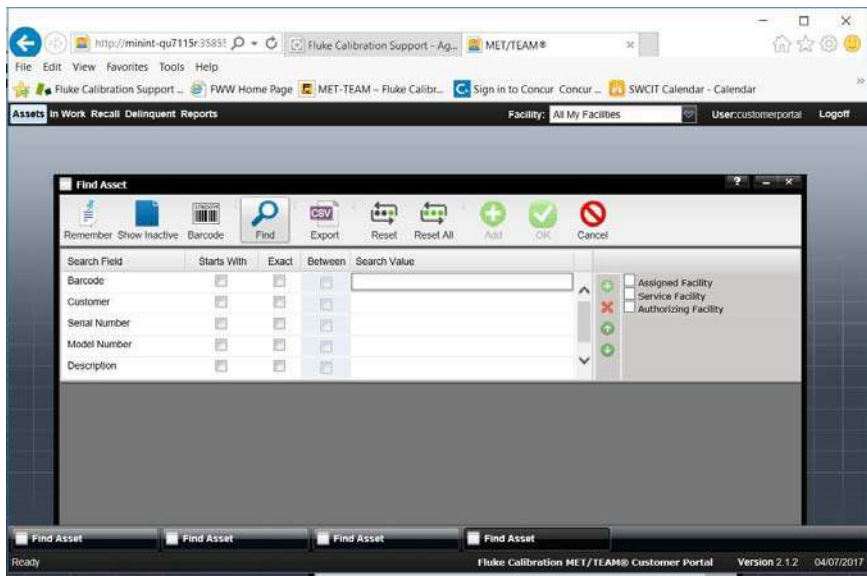
3. Customer Portal has five tab options for Customer Portal users to use: Assets, In Work, Recall, Delinquent, and Reports.



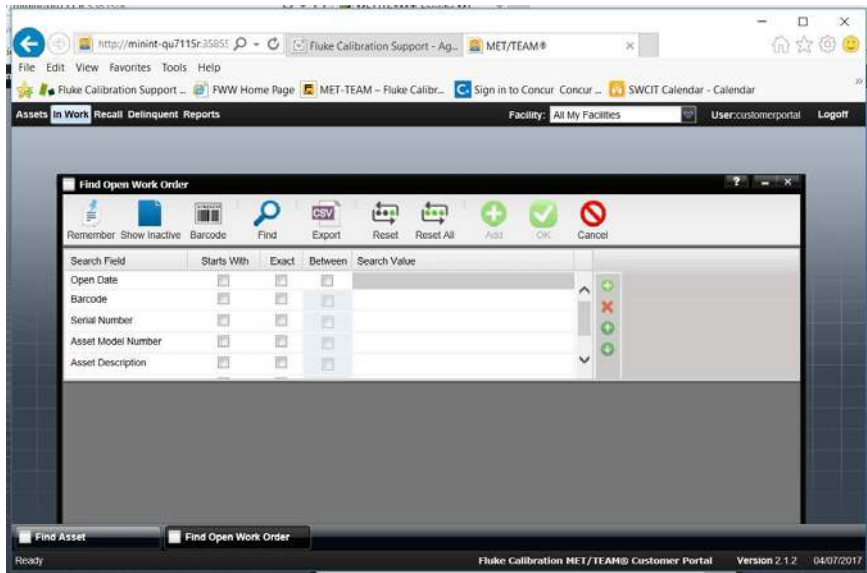
Related articles

[How to setup a User/Contact, allowing them access to Customer Portal.](#)
[MET/TEAM Quick Start Guide](#)
[How to move MET/TEAM in its entirety](#)
[MET/CAL 9.0 Quick Installation Guide](#)
[Change to the Manual Template Editing Process in MET/TEAM 2.2.1](#)

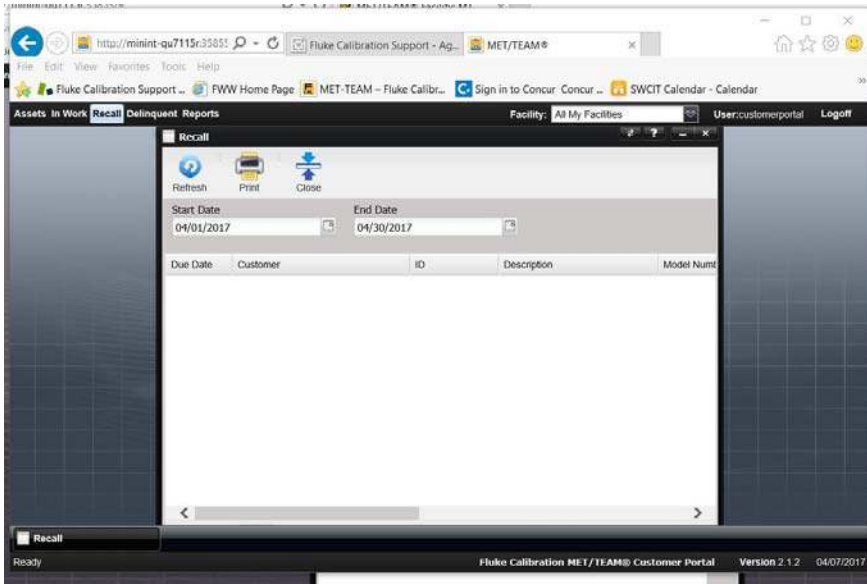
4. To view information on one of your assets, click "Assets" and search for the Asset in question.



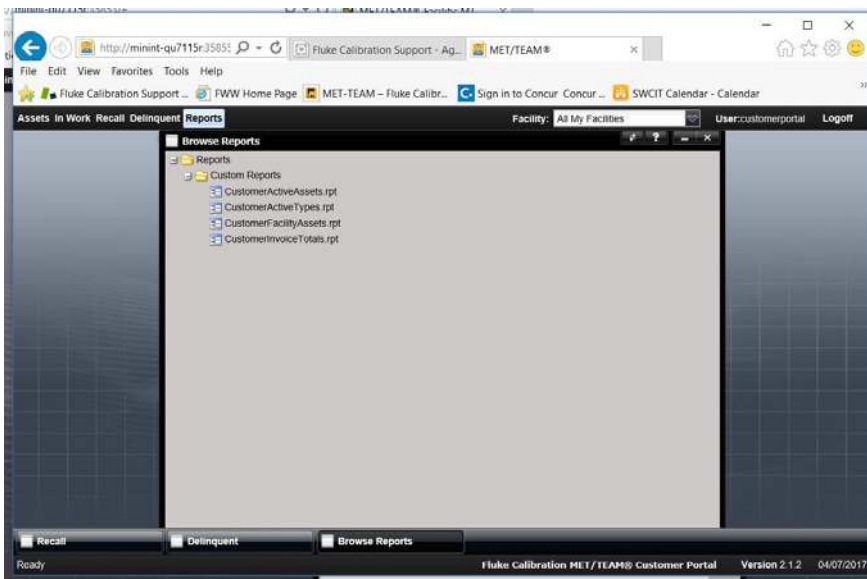
5. To view an open Work Order for one of your Assets, click on the "In Work" tab. If the Work Order is closed, click on the "Show Inactive" icon".



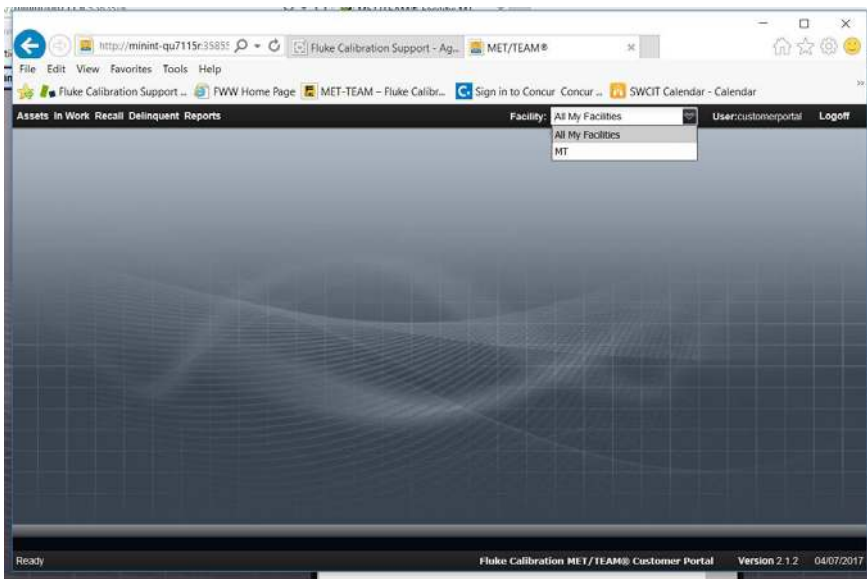
6. To see which of your Assets are due for recall or are Delinquent, click on the appropriate tab and click the "Refresh" icon. Adjust the date range accordingly.



7. To see any Reports that you need, click on the "Reports" tab. Select the appropriate Report from the list.



8. If you represent multiple Facilities, you can change which Facilities information you see by adjusting the dropdown in the upper right of the Customer Portal screen.



9. Don't forget to logout when you are done with Customer Portal by clicking on the Logoff button in the upper right corner of the Customer Portal screen.

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