

# Shibaura Machine

## Customer Portal Instruction Manual

2025

Version 1.3

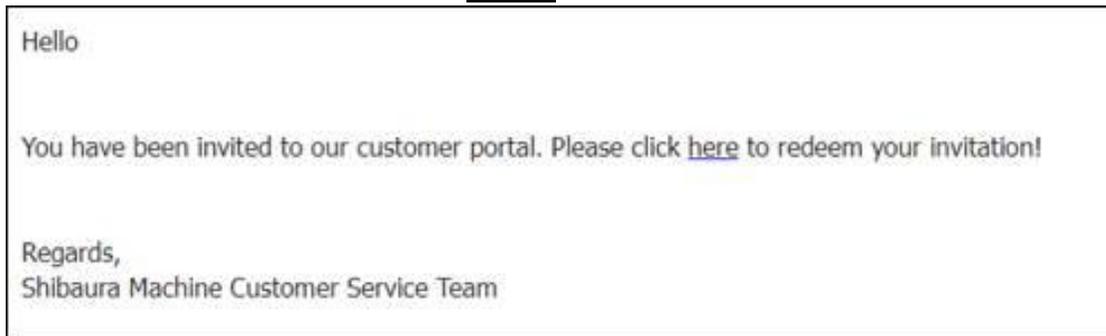
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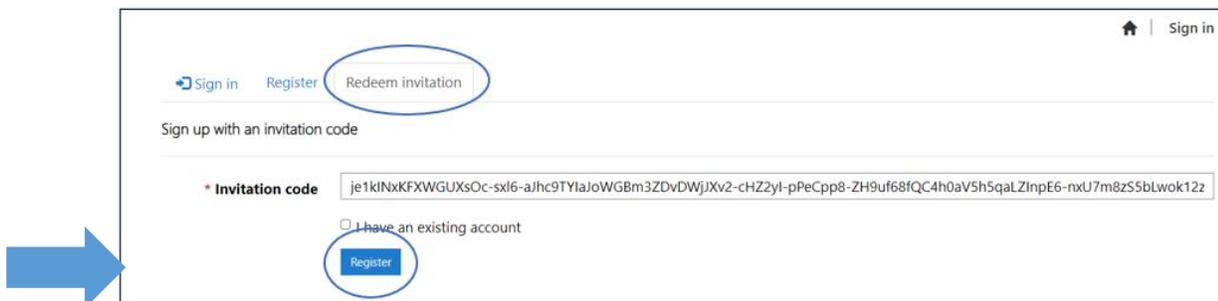
## Account and Contact Information

### Creating a User name and log in

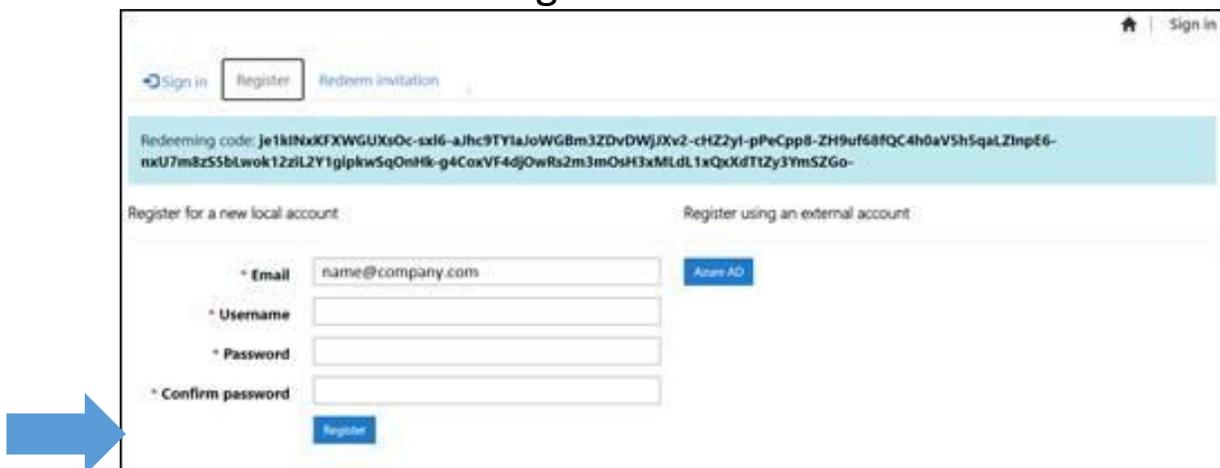
#### 1. Invitation email – Click on [here](#)



#### 2. Viewing the redeem invitation page. Click Register



#### 3. Complete the registration page by inputting a Username and Password. Then Click Register



4. Once registered visit please visit the portal website at <https://shibauracsportal.powerappsportals.com> to confirm your email address. Select your name in the upper right corner, then click Profile. Then Click Confirm Email.

5. Upon clicking the Confirm Email button, you will receive an email containing a link to verify your email address. Please Click the Complete Registration link in the email to finalize the confirmation process.

## How to see your profile information

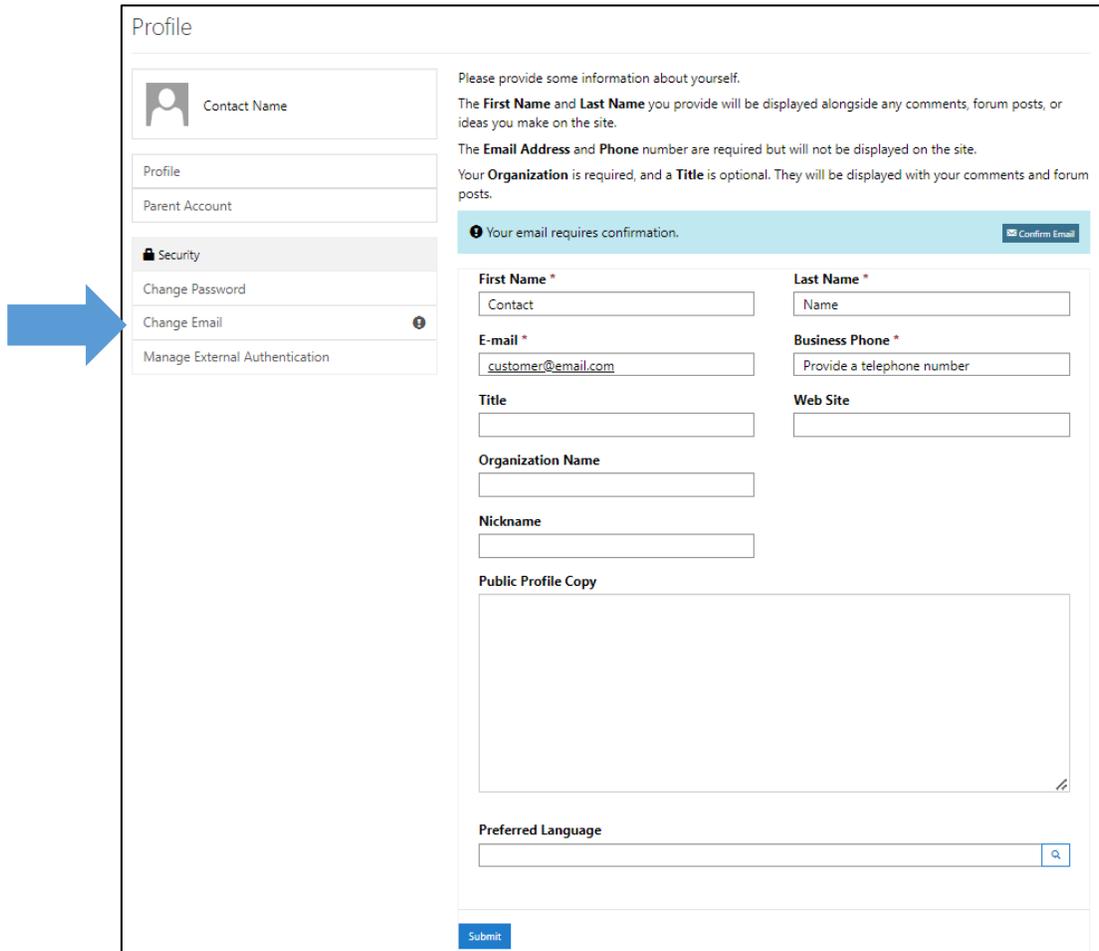
1. Select your name in the upper right corner, then click Profile



2. You can view and change your contact details. If a change is made, click Submit for the new information to be saved.

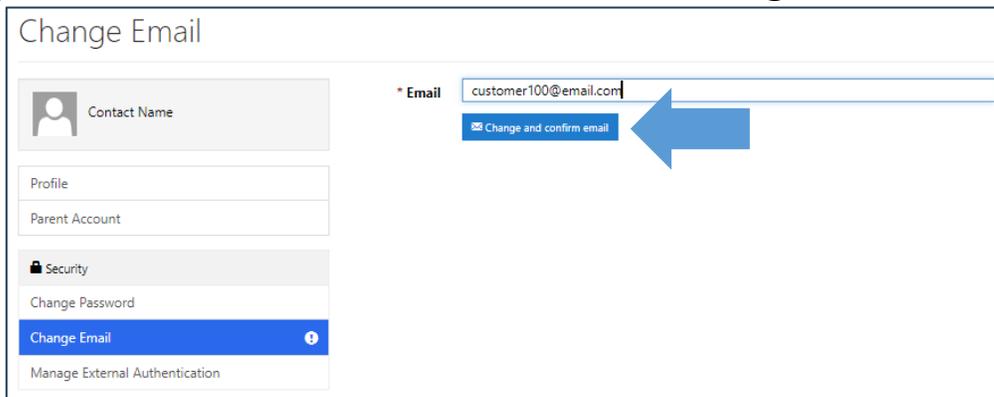
# How to change your E-Mail address

## 1. Select Change E-Mail



The screenshot shows the 'Profile' page. On the left sidebar, the 'Security' section is expanded, and 'Change Email' is highlighted with a blue arrow. The main content area contains a form for updating profile information. A blue banner at the top of the form states: 'Your email requires confirmation.' with a 'Confirm Email' button. The form fields include: First Name (Contact), Last Name (Name), E-mail (customer@email.com), Business Phone (Provide a telephone number), Title, Web Site, Organization Name, Nickname, Public Profile Copy (a large text area), and Preferred Language. A 'Submit' button is at the bottom.

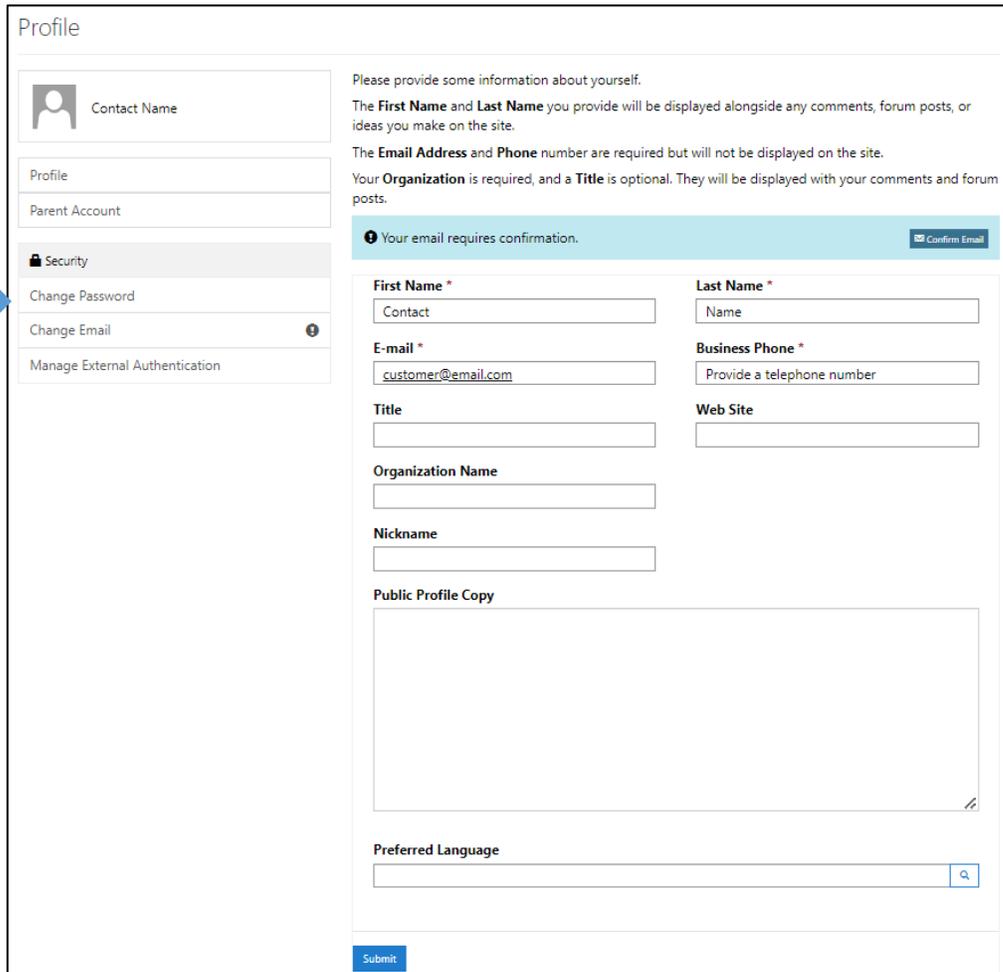
## 2. Input new E-Mail address, then click Change and confirm email



The screenshot shows the 'Change Email' page. The 'Change Email' option in the left sidebar is highlighted in blue. The main form has the 'Email' field filled with 'customer100@email.com'. A blue arrow points to the 'Change and confirm email' button, which is also highlighted in blue.

# How to change your password

## 1. Select Change Password



Profile

Please provide some information about yourself.

The **First Name** and **Last Name** you provide will be displayed alongside any comments, forum posts, or ideas you make on the site.

The **Email Address** and **Phone** number are required but will not be displayed on the site.

Your **Organization** is required, and a **Title** is optional. They will be displayed with your comments and forum posts.

**Your email requires confirmation.** [Confirm Email](#)

**First Name \***  
Contact

**Last Name \***  
Name

**E-mail \***  
customer@email.com

**Business Phone \***  
Provide a telephone number

**Title**

**Web Site**

**Organization Name**

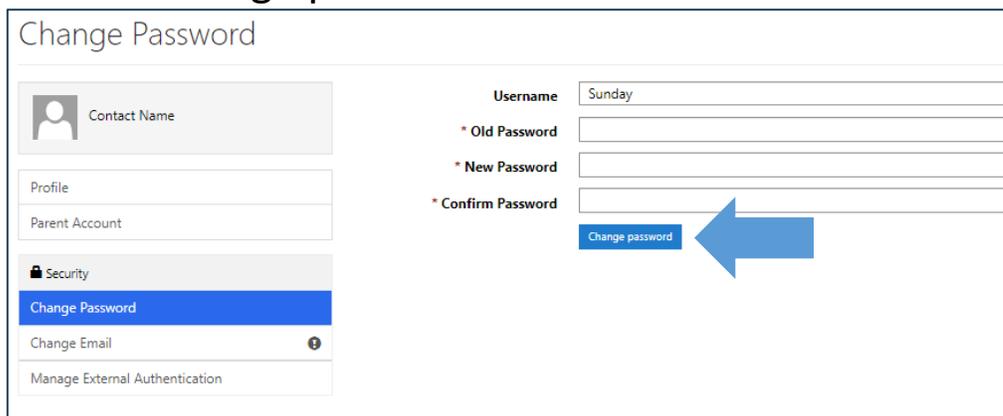
**Nickname**

**Public Profile Copy**

**Preferred Language**

[Submit](#)

## 2. Input Old Password, New Password and Confirm Password, then click Change password.



Change Password

**Username** Sunday

**\* Old Password**

**\* New Password**

**\* Confirm Password**

[Change password](#)

## Sorting and Search Functionality

### Blue column headers provide sorting capabilities

1. Click on blue column headers to change how the data is sorted

Cases

Resolved Cases - Portal-

Created On ↓

Case Title	Case Number	Case Type	Priority	Status	Created On ↓	Resolved Date	Contact
adfafas	CAS-73293-S7W5D7	Service	Medium	Resolved	8/8/2024 11:36 AM	8/9/2024 11:06 AM	Contact Name
PO Status Update	CAS-73251-L3L1V2	Parts	Medium	Resolved	8/8/2024 7:52 AM	8/8/2024 11:15 AM	
PO Status Update	CAS-72813-P4N0X4	Parts	Medium	Resolved	8/2/2024 10:13 AM	8/2/2024 10:27 AM	

### Blue characters provide a link to additional data

1. Click on the blue link to see the case details

Cases

Resolved Cases - Portal-

Created On ↓

Case Title	Case Number	Case Type	Priority	Status	Created On ↓	Resolved Date	Contact
adfafas	CAS-73293-S7W5D7	Service	Medium	Resolved	8/8/2024 11:36 AM	8/9/2024 11:06 AM	Contact Name
PO Status Update	CAS-73251-L3L1V2	Parts	Medium	Resolved	8/8/2024 7:52 AM	8/8/2024 11:15 AM	
PO Status Update	CAS-72813-P4N0X4	Parts	Medium	Resolved	8/2/2024 10:13 AM	8/2/2024 10:27 AM	

### How to filter the data using the search windows

1. In the search window input the characters you would like to use to filter the data. Use an \* before or after as a wild card, then click the magnifying glass to view the results.

Cases

Resolved Cases - Portal-

Created On ↓

Case Title	Case Number	Case Type	Priority	Status	Created On ↓	Resolved Date	Contact
adfafas	CAS-73293-S7W5D7	Service	Medium	Resolved	8/8/2024 11:36 AM	8/9/2024 11:06 AM	Contact Name
PO Status Update	CAS-73251-L3L1V2	Parts	Medium	Resolved	8/8/2024 7:52 AM	8/8/2024 11:15 AM	
PO Status Update	CAS-72813-P4N0X4	Parts	Medium	Resolved	8/2/2024 10:13 AM	8/2/2024 10:27 AM	

## Navigation Tabs

Navigation tabs at the top of the page direct you to the different areas of the portal

1. Click on any of the tabs to be directed to that area.



Home

Assets (Machines)

Cases

Quotes

Work Orders

Sales Orders

Order Tracking

Invoices/Credits

Portal Comments

User Information

## Assets (Machines)

**Asset List** - Provides a list of all your assets including; machine model, serial number, manufacturing number (if appropriate), warranty information, your machine name and plant/building

Assets						
<input type="text"/> <input type="button" value="Q"/>						
Service Location Composite (Functional Location)	Machine Model	Serial No. ↑	Manufacturing No.	Customer Warranty End Date	Customer Machine Name	Plant/Building
36 EAST BERNE STREET, BERNE,NE, USA	DC500J-MS	8T1E77		3/1/2008	500T #1	#2
36 EAST BERNE STREET, BERNE,NE, USA	DC500J-MS	8T1E26		12/1/2012	500T #2	#2
36 EAST BERNE STREET, BERNE,NE, USA	DC350J-MS	8T1D20		12/1/2012	350T #2	#1
36 EAST BERNE STREET, BERNE,NE, USA	DC350J-MS	8T1D21		3/1/2008	350T #1	#1

## How to input your machine / building naming conventions

1. Click on the appropriate asset to see the Edit Asset page

Assets						
<input type="text"/> <input type="button" value="Q"/>						
Service Location Composite (Functional Location)	Machine Model	Serial No. ↑	Manufacturing No.	Customer Warranty End Date	Customer Machine Name	Plant/Building
36 EAST BERNE STREET, BERNE,NE, USA	DC500J-MS	8T1E77		3/1/2008	500T #1	#2
36 EAST BERNE STREET, BERNE,NE, USA	DC500J-MS	8T1E26		12/1/2012	500T #2	#2
36 EAST BERNE STREET, BERNE,NE, USA	DC350J-MS	8T1D20		12/1/2012	350T #2	#1
36 EAST BERNE STREET, BERNE,NE, USA	DC350J-MS	8T1D21		3/1/2008	350T #1	#1

2. Fill in the appropriate Customer Machine Name and Plant/Building fields with your naming conventions
3. Click on Submit and the bottom of the page to save the updated data.

### Edit Asset

<b>Asset Id</b> BIT IE77	<b>Customer Machine Name</b> <input type="text" value="S00T #2"/>	<b>machiNetCloud Project ID</b> —
<b>Customer *</b> LLC	<b>Plant/Building</b> <input type="text" value="#2"/>	<b>Subscription Type</b> Select
<b>AX Number</b> LLC7	<b>Division</b> Diecasting	<b>Duration</b> —
<b>Machine Model</b> DCS00J-MS		<b>End Date</b> —
<b>Serial No.</b> BIT IE77		
<b>Manufacturing No.</b> —		
<b>Customer Warranty Start Date</b> 3/1/2007		
<b>Customer Warranty End Date</b> 3/1/2008		

Cases [Create](#)

Case Title	Case Number	Case Type	Priority	Status Reason	Created On ↓	Contact
There are no records to display.						

Work Orders

Work Order Number	Work Order Type	Created On ↓	Primary Incident Type	Primary Incident Description	System Status
There are no records to display.					

[Submit](#)

## How to create a case from an asset

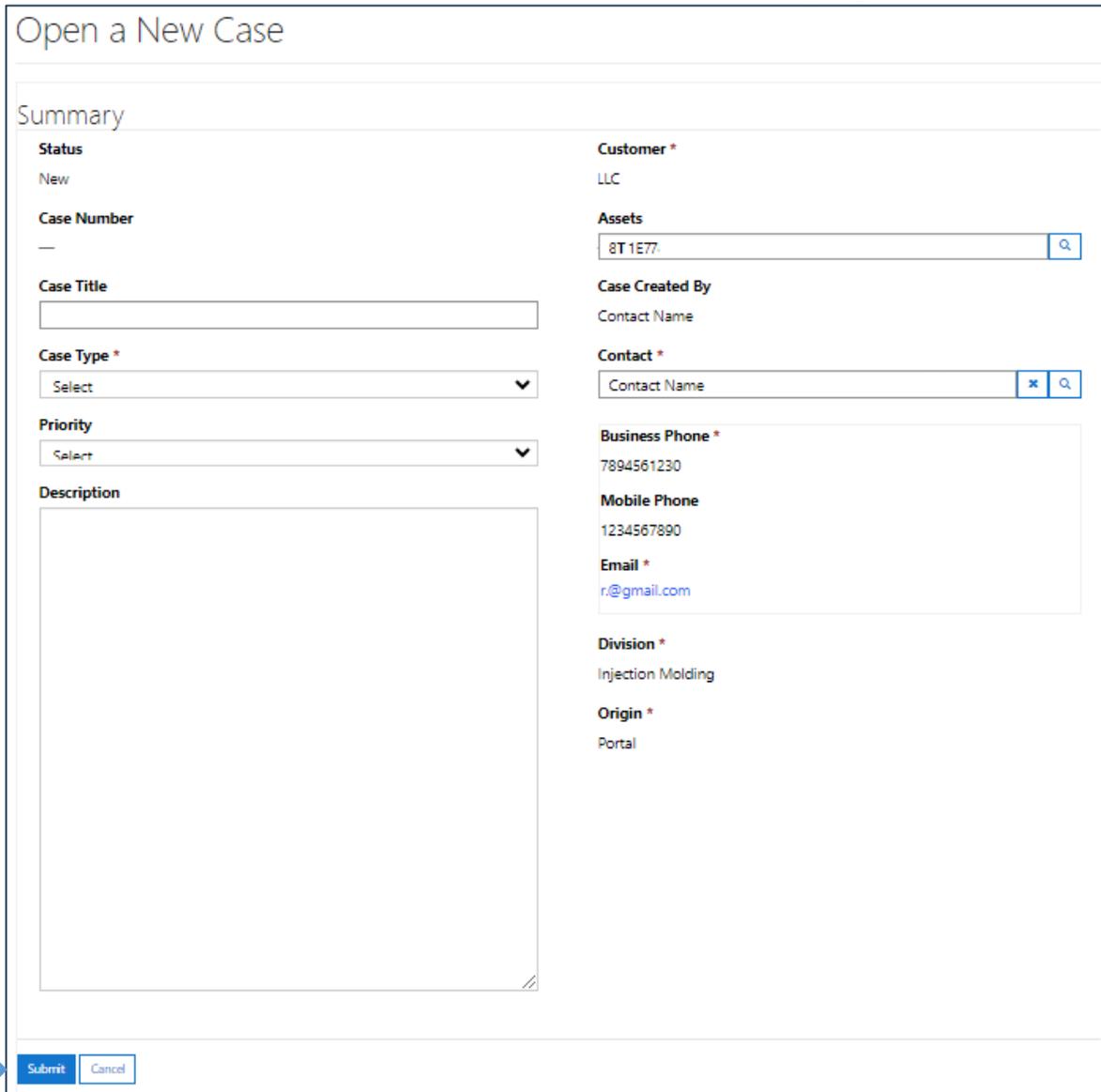
1. From the edit asset page, Click on the Create button.

### Edit Asset

<b>Asset Id</b> BIT IE77	<b>Customer Machine Name</b> <input type="text" value="500T #2"/>	<b>machiNetCloud Project ID</b> —
<b>Customer *</b> LLC	<b>Plant/Building</b> <input type="text" value="#2"/>	<b>Subscription Type</b> Select
<b>AX Number</b> LLC7	<b>Division</b> Diecasting	<b>Duration</b> —
<b>Machine Model</b> DCS00J-MS		<b>End Date</b> —
<b>Serial No.</b> BIT IE77		
<b>Manufacturing No.</b> —		
<b>Customer Warranty Start Date</b> 3/1/2007		
<b>Customer Warranty End Date</b> 3/1/2008		
<b>Cases</b>		<a href="#">Create</a>

Case Title	Case Number	Case Type	Priority	Status Reason	Created On ↓	Contact
There are no records to display.						

- From the Open a New Case form; Input a Case Title, select a Cast Type, Priority, Complete the description, the asset will automatically be selected, however you can change the Contact if necessary. Once all the information is completed, click on the Submit button at the bottom of the page.

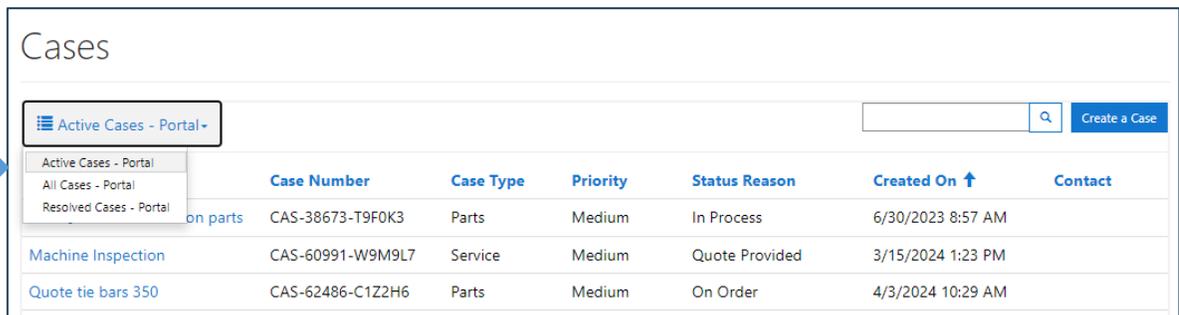


The screenshot shows a web form titled "Open a New Case". The form is divided into two main columns. The left column contains fields for "Status" (New), "Case Number" (—), "Case Title" (text input), "Case Type\*" (dropdown menu with "Select"), and "Priority" (dropdown menu with "Select"). Below these is a large "Description" text area. The right column contains fields for "Customer\*" (LLC), "Assets" (text input with "8T1E77" and a search icon), "Case Created By" (Contact Name), "Contact\*" (text input with "x" and search icon), "Business Phone\*" (7894561230), "Mobile Phone" (1234567890), "Email\*" (r@gmail.com), "Division\*" (Injection Molding), and "Origin\*" (Portal). At the bottom left of the form, there are two buttons: "Submit" and "Cancel". A blue arrow points to the "Submit" button.

## Cases

### How to see Active, All and Resolved case views

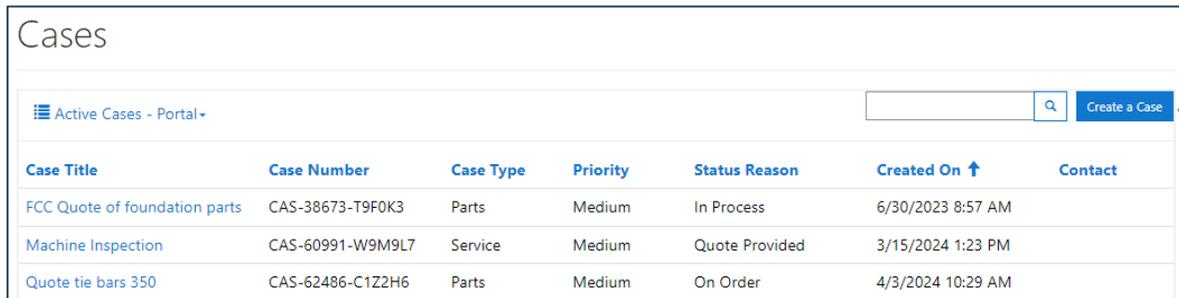
1. Select between the different views to see Active, All and Resolved cases



	Case Number	Case Type	Priority	Status Reason	Created On ↑	Contact
on parts	CAS-38673-T9F0K3	Parts	Medium	In Process	6/30/2023 8:57 AM	
Machine Inspection	CAS-60991-W9M9L7	Service	Medium	Quote Provided	3/15/2024 1:23 PM	
Quote tie bars 350	CAS-62486-C1Z2H6	Parts	Medium	On Order	4/3/2024 10:29 AM	

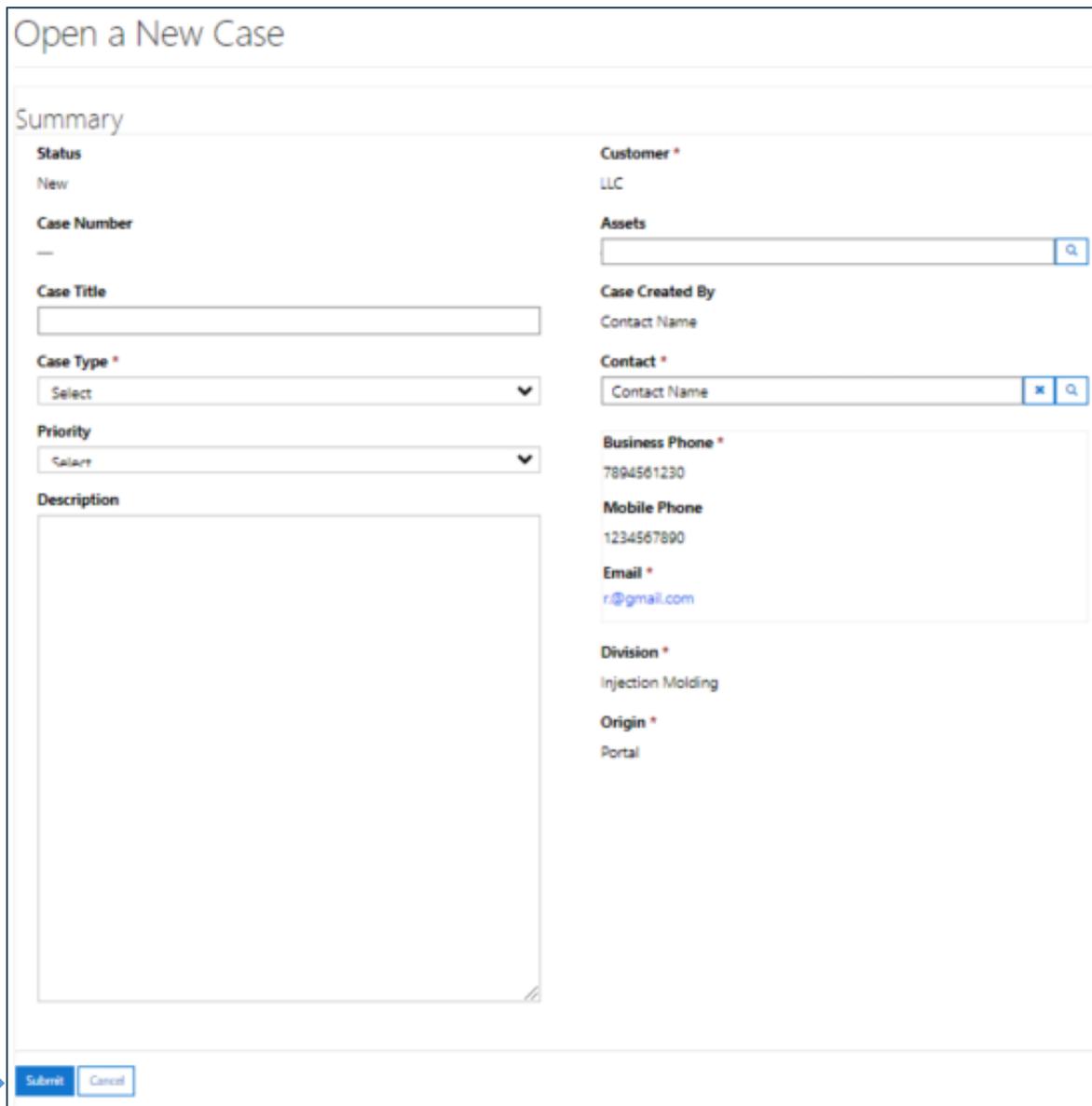
### How to create a new case

1. Click on the Create a Case button to open the New Case form



Case Title	Case Number	Case Type	Priority	Status Reason	Created On ↑	Contact
FCC Quote of foundation parts	CAS-38673-T9F0K3	Parts	Medium	In Process	6/30/2023 8:57 AM	
Machine Inspection	CAS-60991-W9M9L7	Service	Medium	Quote Provided	3/15/2024 1:23 PM	
Quote tie bars 350	CAS-62486-C1Z2H6	Parts	Medium	On Order	4/3/2024 10:29 AM	

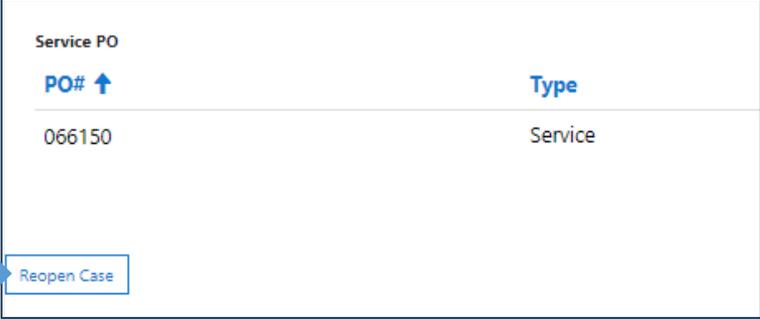
- From the Open a New Case form; Input a Case Title, select a Cast Type, Priority, Complete the description, select the asset if necessary and change the Contact if necessary. Once all the information is completed, click on the Submit button at the bottom of the page.



The screenshot shows a web form titled "Open a New Case". The form is divided into two main columns. The left column contains the following fields: "Status" (New), "Case Number" (—), "Case Title" (text input), "Case Type \*" (dropdown menu with "Select" selected), "Priority" (dropdown menu with "Select" selected), and "Description" (large text area). The right column contains: "Customer \*" (LLC), "Assets" (text input with search icon), "Case Created By" (Contact Name), "Contact \*" (text input with search icon and close button), "Business Phone \*" (7894561230), "Mobile Phone" (1234567890), "Email \*" (r@gmail.com), "Division \*" (Injection Molding), and "Origin \*" (Portal). At the bottom left of the form, there are two buttons: "Submit" and "Cancel". A blue arrow points to the "Submit" button.

## How to reopen a resolved case

1. If a case has been resolved (closed) it can be reopened by, clicking on the Reopen Case button



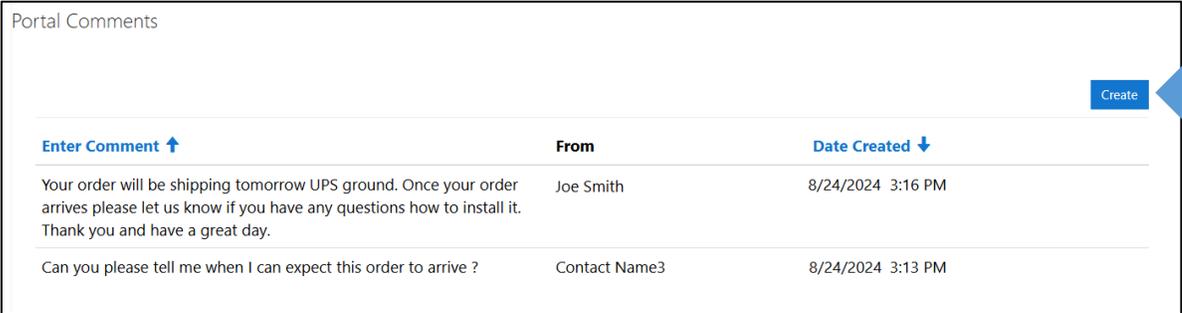
Service PO

PO# ↑	Type
066150	Service

Reopen Case

## How to make a Portal Comment

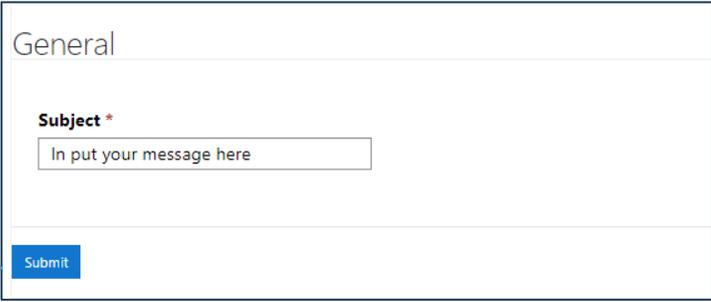
1. If you would like to ask a question or make a comment regarding the case, click the Create button next to the Portal Comments section, input your message in the window, then click Submit



Portal Comments

Create

Enter Comment ↑	From	Date Created ↓
Your order will be shipping tomorrow UPS ground. Once your order arrives please let us know if you have any questions how to install it. Thank you and have a great day.	Joe Smith	8/24/2024 3:16 PM
Can you please tell me when I can expect this order to arrive ?	Contact Name3	8/24/2024 3:13 PM



General

**Subject \***

Submit

## Quotations

### How to see active or recently expired quote views

1. Select between the different views to see Active, Accepted and Quotations which have expired in the Last 30 days.

The screenshot shows the 'Quote' portal interface. At the top left, there is a dropdown menu with the following options: 'Active Parts Quotes - Portal', 'Active Service Quotes - Portal', 'Accepted Parts Quotes', 'Accepted Service Quotes', 'Expired Parts Quotes - Last 30 Days', and 'Expired Service Quotes - Last 30 Days'. A blue arrow points to the first option. Below the dropdown is a table with the following columns: 'Case Number (Case)', 'Quote Type', 'Quote Created', 'AX Quote #', 'Revision ID', 'Total Amount', and 'Quote expiration date'. A single row is visible with the following data: '-V3V0Q9', 'Sales quotation', '8/5/2024 4:30 AM', 'QU-00281418', '0', '\$2,210', and '9/4/2024'.

### How to see the Quote details

1. To see more information related to the quote, click on the blue Case Title link.

The screenshot shows the 'Quote' portal interface. The dropdown menu is now set to 'Active Parts Quotes - Portal'. The table below has the same columns as the previous screenshot, but the 'Case Title (Case)' column now contains a blue link labeled 'Quote'. A blue arrow points to this link. The other data in the table remains the same: 'CAS-72937-V3V0Q9', 'Sales quotation', '8/5/2024 4:30 AM', 'QU-00281418', '0', '\$2,210', and '9/4/2024'.

2. In the Quote Details page you can find more information related to the quote, click on the blue Case Title link.

PRODUCTS						
Item	Assets	Quantity	Price Per Unit	List Price	Disc. Amt.	Total Net Value
66G01		1	\$10.00	\$10.00	\$0.00	\$10.00
<b>Total Amount</b>						
\$ 10						

# Work Order

## How to see active or completed Work Order views

1. Select between the different views to see Active, Completed, Canceled or All Work Orders.

Work Orders

Active Work Orders - Portal

Completed Work Orders - Portal

Canceled Work Orders - Portal

All Work Orders - Portal

Work Order ID	Status	Scheduled On	System Status	Assets	Primary Incident Description
MT - 02882	Standard	4/24/2025 9:39 AM	Scheduled	BP-150.R22(130888)	Machine Assessment ** Quotation is for service work of time and materials only. ** ** Additional parts may be needed for the repair must be quoted separately. ** ** Customer must make sure machine and area around the machine are clean and clear of

## When is a field service tech is scheduled to be onsite

2. By selecting a work order number you can see the details. Here you can see when a field service tech is scheduled to be onsite.

Summary

GENERAL

Work Order Number: DC - 57185

Service Account \*: LLC

Billing Account: LLC

Division \*: Diecasting

System Status \*: Scheduled

Work Order Type \*: Standard

Work Order Complete Date: —

Work Order Summary: —

Assets

Customer Asset ↑	Incident Type
D89	DC-Local 1 Day - Charge

BOOKINGS

Booking Status	Start Time ↓	End Time
Scheduled	8/7/2024 8:00 AM	8/9/2024 8:00 AM

Service Address: 936 EAST ROAD

Case: Add SQM stroke value to TOSCAST line c

Case Number: CAS-69352-K4L0C4

Primary Incident Type: DC-Local 1 Day - Charge

Incident Description: Add SQM stroke value to TOSCAST line data

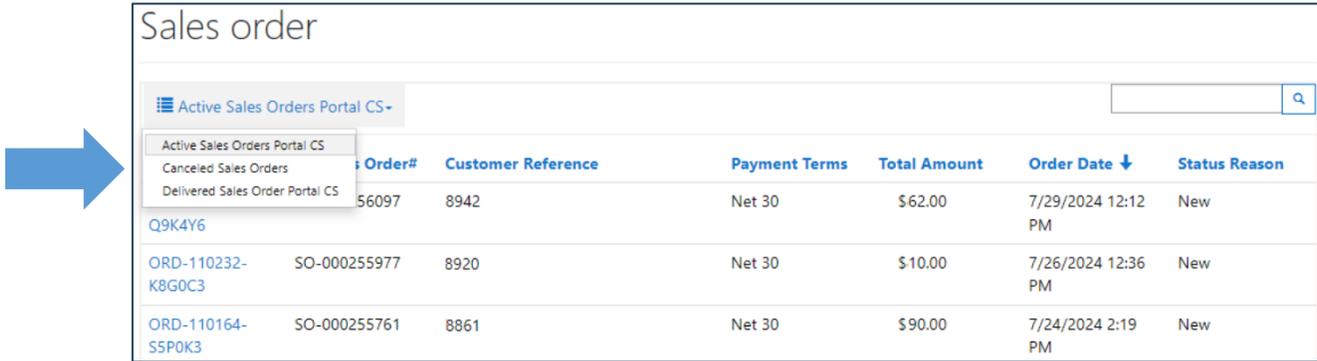
\* Customer must make sure machine and area around the machine are clean and clear of obstruction.  
 \* Any additional errors or problems with the machine will delay the completion of work.  
 \* Any additional issues found with

Primary Incident Customer Asset: D89

## Sales Orders

### How to see active or Delivered Sales Order views

1. Select between the different views to see Active and Delivered Sales Orders



Sales order

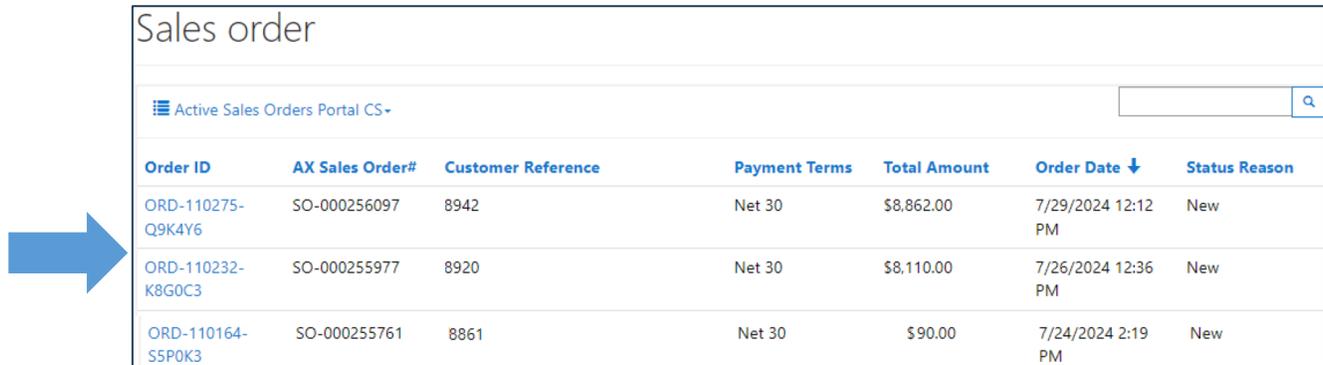
Active Sales Orders Portal CS-

Active Sales Orders Portal CS  
 Canceled Sales Orders  
 Delivered Sales Order Portal CS

Order#	Customer Reference	Payment Terms	Total Amount	Order Date ↓	Status Reason
56097	8942	Net 30	\$62.00	7/29/2024 12:12 PM	New
Q9K4Y6					
ORD-110232-K8G0C3	SO-000255977 8920	Net 30	\$10.00	7/26/2024 12:36 PM	New
ORD-110164-S5P0K3	SO-000255761 8861	Net 30	\$90.00	7/24/2024 2:19 PM	New

### How to see the Sales Order details

1. To see more information related to the quote, click on the blue Sales Order ID # link.



Sales order

Active Sales Orders Portal CS-

Order ID	AX Sales Order#	Customer Reference	Payment Terms	Total Amount	Order Date ↓	Status Reason
ORD-110275-Q9K4Y6	SO-000256097	8942	Net 30	\$8,862.00	7/29/2024 12:12 PM	New
ORD-110232-K8G0C3	SO-000255977	8920	Net 30	\$8,110.00	7/26/2024 12:36 PM	New
ORD-110164-S5P0K3	SO-000255761	8861	Net 30	\$90.00	7/24/2024 2:19 PM	New

2. In the Order Details page you can find more information related to the quote, click on the blue Case Title link.

PRODUCTS						
Item	Assets	Quantity	Price Per Unit	List Price	Disc. Amt.	Total Net Value
66G01		1	\$10.00	\$10.00	\$0.00	\$10.00
<b>Total Amount</b>						
\$10						

## Order Tracking

### How to look up Tracking Information of a part

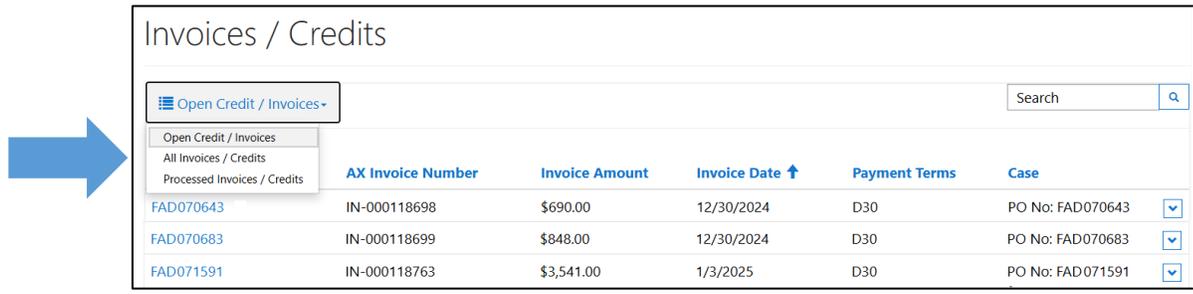
1. Each item sold is an individual line item. This allows you to utilize the search function to look up by part number, description, Sales Order #, your PO # (Customer Reference).

Order Tracking						
						<input type="text"/>
AX Sales Order#	Order Date ↓	Customer Reference	Description	Part Number	Quantity	Tracking Number
SO-000253028	6/11/2024 5:19 PM	68063	1B-G130 [O-RING]	1B-G130	1.00	64688120356
SO-000253028	6/11/2024 5:19 PM	68063	657R0201 [HEAT BEARING 6206-HT2 SAME AS 685R0902]	657R0201	5.00	64688120356
SO-000253028	6/11/2024 5:19 PM	68063	N2.5A [LADLE CUP]	N2.5A	6.00	64688120356
SO-000253028	6/11/2024 5:19 PM	68063	SDR-106 [SCRAPER]	SDR-106	1.00	
SO-000253028	6/11/2024 5:19 PM	68063	SKY-106 [SKY PACKING]	SKY-106	1.00	64688120390

# Invoice/Credits

## How to see invoice information

1. Select between the different views to see Open, All, Processed (Settled) Invoices



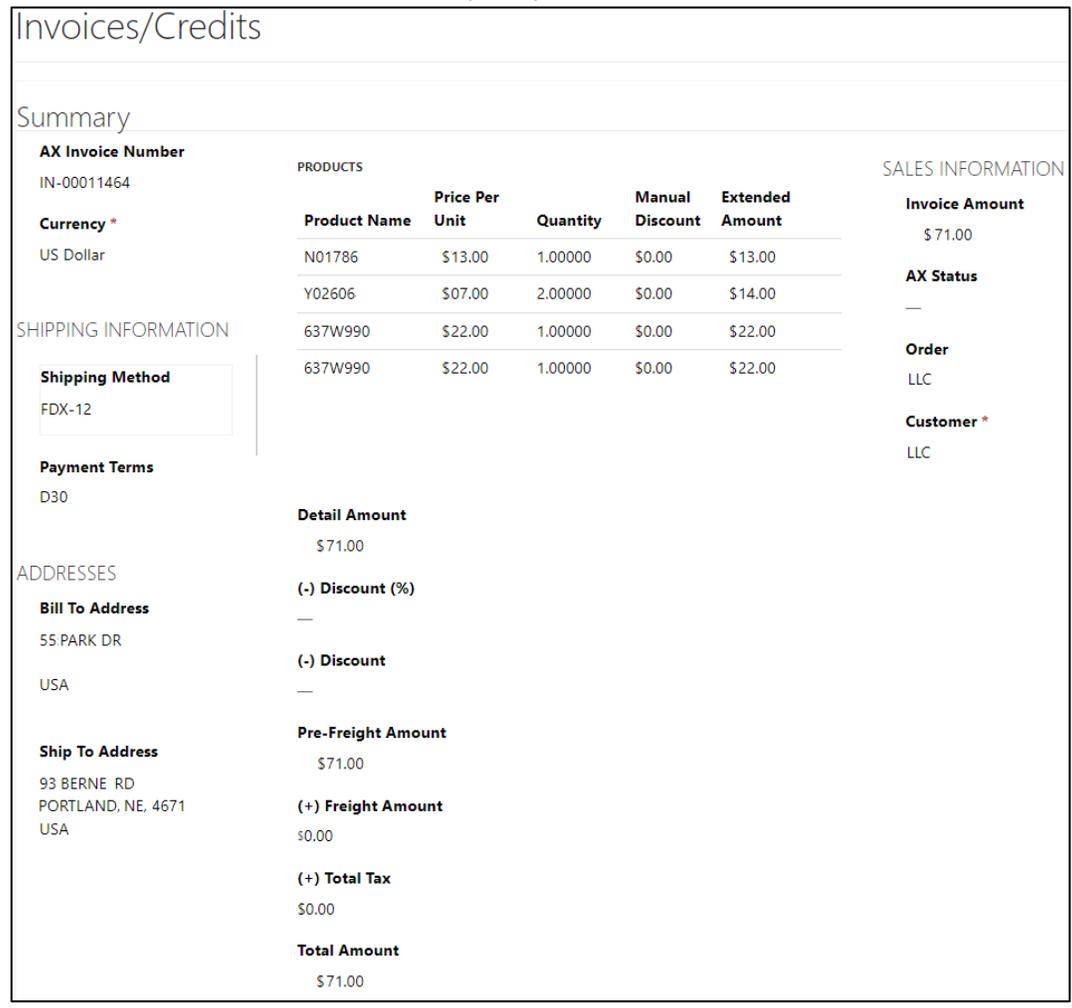
Invoices / Credits

Open Credit / Invoices -

Open Credit / Invoices  
All Invoices / Credits  
Processed Invoices / Credits

	AX Invoice Number	Invoice Amount	Invoice Date ↑	Payment Terms	Case
FAD070643	IN-000118698	\$690.00	12/30/2024	D30	PO No: FAD070643
FAD070683	IN-000118699	\$848.00	12/30/2024	D30	PO No: FAD070683
FAD071591	IN-000118763	\$3,541.00	1/3/2025	D30	PO No: FAD071591

2. To see more information related to the Invoice , click on the blue Customer Reference (PO) link.



Invoices/Credits

Summary

AX Invoice Number	PRODUCTS	SALES INFORMATION
IN-00011464		Invoice Amount
Currency *	Price Per Unit	\$71.00
US Dollar	Quantity	AX Status
	Manual Discount	—
	Extended Amount	Order
		LLC
		Customer *
		LLC

SHIPPING INFORMATION

Shipping Method: FDX-12

Payment Terms: D30

Detail Amount: \$71.00

ADRESSES

Bill To Address: 55 PARK DR, USA

Ship To Address: 93 BERNE RD, PORTLAND, NE, 4671, USA

(-) Discount (%): —

(-) Discount: —

Pre-Freight Amount: \$71.00

(+) Freight Amount: \$0.00

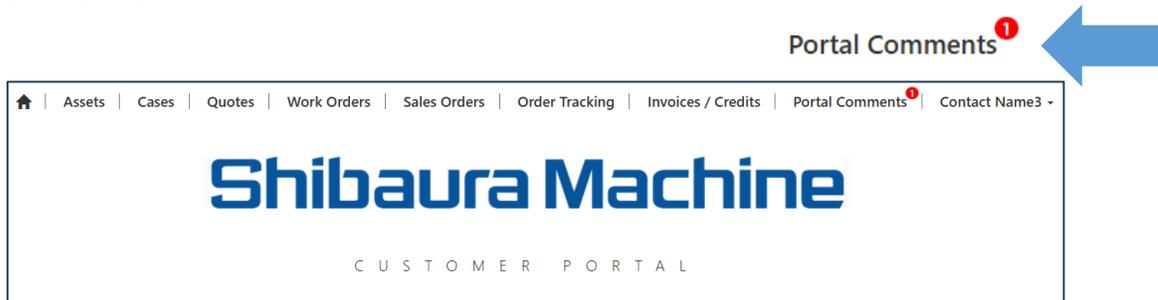
(+) Total Tax: \$0.00

Total Amount: \$71.00

## Portal Comments

### Portal comment notifications

1. If there is an unread message, you will see the notification number listed in the header next to Portal Comments tab. It will also inform you of how many comments are waiting for your review.



2. When opening the Portal Comment tab, all unread comments will be listed and provide you the ability to go directly to the case by clicking on the link. Only after viewing the comment in the case will the notification be removed.

The screenshot shows the 'Portal Comments' section of the customer portal. It features a search bar and a table with the following columns: Comment, Case Title, Case Number, Created On, and Created By. A blue arrow points to the first row of the table.

Comment	Case Title	Case Number	Created On	Created By
Yes, if you like we can ship UPS Next day and you will receive the part tomorrow.	<a href="#">RE: Shibaura Machine CS Portal</a>	CAS-96541-C8X1W3	6/1/2024, 8:58:33 AM	John Smith