


	<h1>User Guide</h1>	
Title:	Customer Portal – Customers	
Date:	March 2021	
Version:	1.0	

## Overview

*Guidance for viewing account statements and raising disputes within the Customer Portal System.*

If you have any issues and require further assistance, please email [servicedesk@peelports.com](mailto:servicedesk@peelports.com).

*This user guide will cover:*

- Activating Login for Customer Portal
- Logging on
- Viewing your Account Statements
- Create Disputes

## Activating Account (logging on for the first time)

1. An email will be sent to the primary email address that payments are setup currently.

Example below

**Activate Your Account**

**Dear Dale Black,**

An account has been created for you on the Peel Ports SAP Customer Portal. To activate your account for [Peel Ports Customer Portal \(Production\)](#), open the link below. You will be taken to a page where you will also set a password for your account.

Click here to activate your account

If the link above is not displayed or does not work, copy and paste the link below to the address bar of your browser.


<https://aew36swgj.accounts.ondemand.com/ids/activation?token=11A5C299245B0223C572663E850A92B2DDI12E623DEDA34560F1FAE185C0376BB2F5BB0D480785248CDC78545861FDEB59D1>

When you have activated your account, please login to the Customer Portal at [customerportal.peelports.com](http://customerportal.peelports.com)

Best regards,  
Peel Ports

For more information on the Customer Portal, please visit [peelports.com/myaccount](http://peelports.com/myaccount) where you will be able to find a User Guide and a set of FAQs.

2. Select **Click here to activate your account**.

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An account has been created for you. To activate your account for [Peel Ports Customer Portal](#), click the link below. You will be taken to a page where you will also set a password for your account.

Click here to activate your account

3. Setup new password.
4. Click **Save**.
5. Company – Enter Company name.
6. City – Enter city the company is in relevance to.
7. Country - Select Country.
8. Read, review and agree to terms and conditions.
9. Click **Save and Continue**.

Terms and Conditions

I have read and understood the Terms and Conditions of Peel Ports Customer Portal (Production). \*

Our privacy statement is available [here](#)

\*Required


Save and Continue

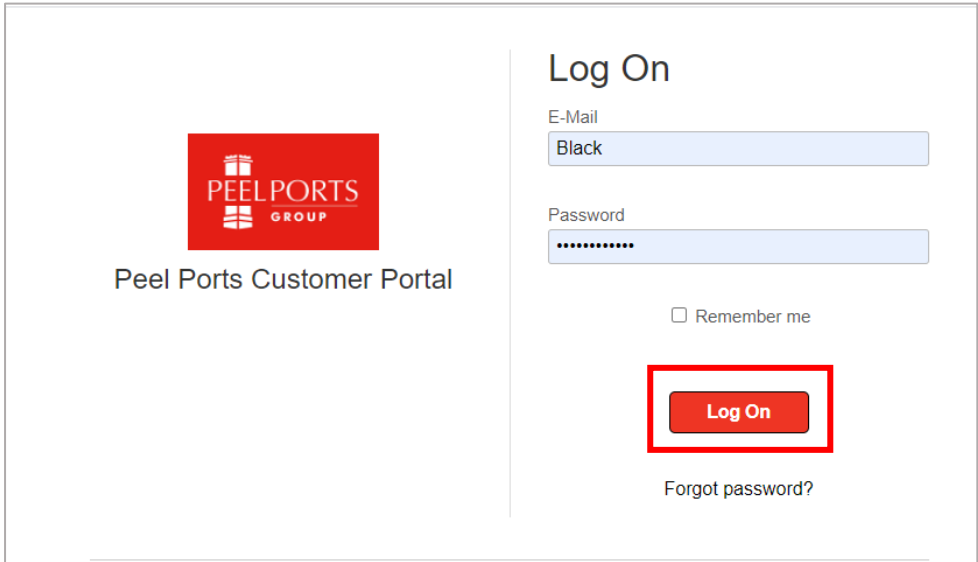
The account will be activated and will re-direct you the Peel Portal site.

### How to Log On

10. Open the link for customer Portal [customerportal.peelports.com](http://customerportal.peelports.com)
11. Enter **Email** and **Password** you have registered for the customer portal.
12. Select **Log On**.



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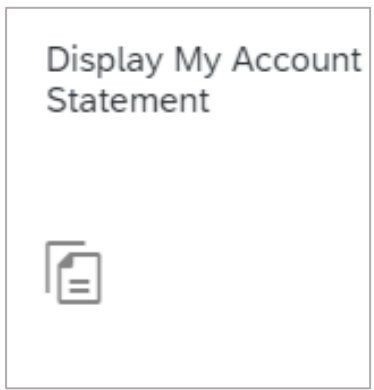
- (Optional) if password is forgotten, select **Forgot Password** and follow the instructions on screen.


## How To View Your Account Statements

The steps below will provide guidance to be able to Allows customer to user filters to display statement data (invoices, credit memos, etc) and also view age subtotal categories.

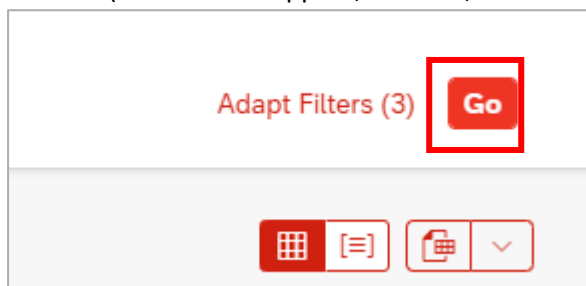
Note - you can view copies of invoices and credit notes for documents that begin with a 1 or a 9. The other documents relate to invoices and credit notes which originate in a different system so cannot not be viewed. We are working on getting this into the portal in the future.

- Logon to the Customer Portal link provided.
- Select the App **Display My Account Statement**.



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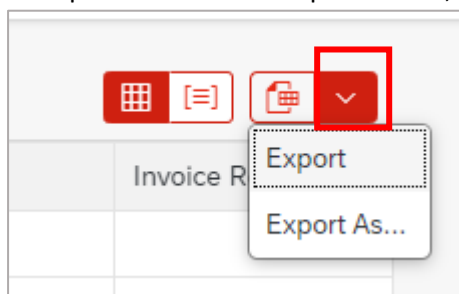
16. Click **Go** (all items will appear, invoices, Credit memo, etc).



17. (Optional) If you require to search for a specific item, please use the following filters:

- **Account** (Select account)
- **Status** (Open Closed)
- **Posting Date** (date the item has been posted)
- **Due Date** (the date the item is due)
- **Document Date** (the date the document was raised)
- **Clearing Date** (the date if cleared)
- **Dispute** (if there is a dispute with the item)
- **Document Number** (Invoice, credit memo number)
- **Type** (invoice, Credit Memo)
- **Amount** (the amount for item)


18. To export the items to a spreadsheet, select Export as highlighted.



Note – Selecting **Export As**, will allow to export using filter.

19. To select an item, locate the **item** from the **Document Number** column and select the blue link.

Note – If you require to amend the columns in ascending and descending order, this can be done by selecting the column.


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Items (20)	
Document N...	Type
90000221	Invoice
90000222	Invoice
90000223	Invoice
90000224	Invoice
90000225	Invoice
90000226	Invoice
1800000039	Credit memo

20. When opened, you can view the following information:

- Info (Posting Date, Due Date)
- Items (Product Number, Description)
- Payments (If payments have been made a tab will appear)
- Attachments (If any attachments have been added a tab will appear)

<a href="#">Info</a>	<a href="#">Items</a>	<a href="#">Attachments</a>										
<p><b>Basic Information</b></p> <p>Recipient : Customer Payments Demo</p> <p>Sender: SAP A.G.</p> <p>Reference: 0090000224</p>		<p><b>Related Dates</b></p> <p>Posting Date: Jan 2, 2020</p> <p>Payment Baseline Date: Jan 2, 2020</p> <p>Due Date: Feb 1, 2020</p>										
<p><b>Items</b></p>												
<p>Items (1)</p> <table border="1"> <thead> <tr> <th>Item</th> <th>Product Number</th> <th>Description</th> <th>Quantity</th> <th>Unit</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>SRI_MAT</td> <td>CATT-Material</td> <td>15.000</td> <td>EA</td> </tr> </tbody> </table>			Item	Product Number	Description	Quantity	Unit	1	SRI_MAT	CATT-Material	15.000	EA
Item	Product Number	Description	Quantity	Unit								
1	SRI_MAT	CATT-Material	15.000	EA								

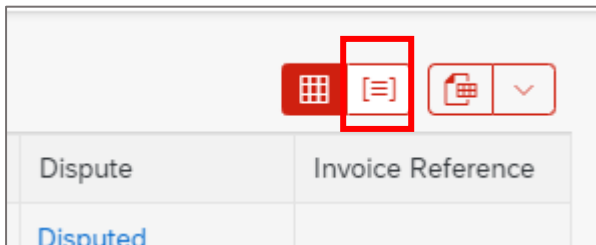
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## Switch From Standard View (default) To Ageing View

Important -If there are multiple currencies within the aged segment you will need to expand (but no sub-total per currency is available).

21. Repeat steps 8-10.

22. press the icon **Switch to Ageing View** .




23. The view will now be amended due date (example below), to view the items within the due dates, select the arrow as highlighted.

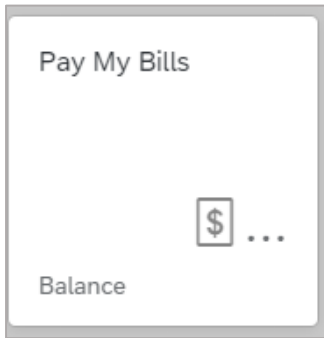
Items (15)			
	Document Number	Type	Status
>	Aging: Overdue by More Than 90 Days		
>	Aging: Overdue by 61 to 90 Days		
>	Aging: Overdue by 31 to 60 Days		
>	Aging: Overdue by 1 to 30 Days		
>	Aging: Due in 0 to 30 Days		

## Create Disputes Within The System

This section will take you through the process of creating a dispute with any invoices, credit memos that are in the system and to be able to add a reason and attach document in relevance.

24. Select the App **Pay My Bills**.

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25. Locate and select the relevant invoice(s) that requires a dispute creating by selecting the checkbox as highlighted.

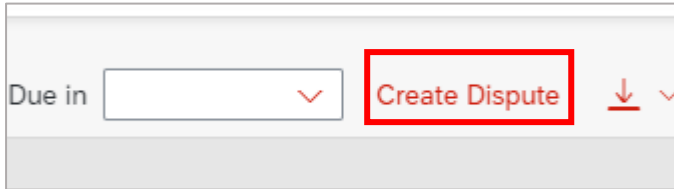
Note – within the Reference column this will inform of the following:

- Convergent Billing - Contains the TOS (Terminal Operating System) Invoice number.
- Event Billing - The reference will be populated with the billing document

Open Bills (15)	
2 items selected. Total sele	
<input type="checkbox"/>	Invoice Number
<input type="checkbox"/>	1800010637
<input type="checkbox"/>	1800010638
<input checked="" type="checkbox"/>	1800011618
<input type="checkbox"/>	1800011925
<input type="checkbox"/>	1800011926
<input type="checkbox"/>	1800011927
<input checked="" type="checkbox"/>	1800011928
<input type="checkbox"/>	600004012
<input type="checkbox"/>	600004013
<input type="checkbox"/>	600003015

26. Select **Create Dispute** (pop up window will display).

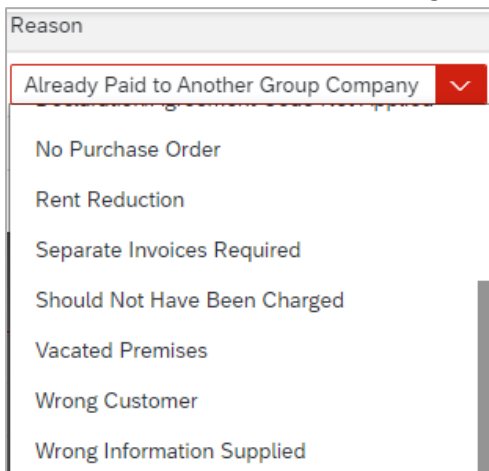
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- 27. Reason – Select from the dropdown list the reason for the dispute.
- 28. Important – Ensure the reason selected is relevant to the dispute or closest to this.

Examples below:

- Charge Waived
- Wrong Quantity
- Should Not Have Been Charged




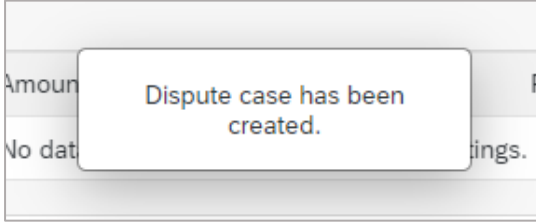
- 29. Comment – Add in as free text any additional information for the dispute.
- Important – Ensure a comment is added for the reason of dispute



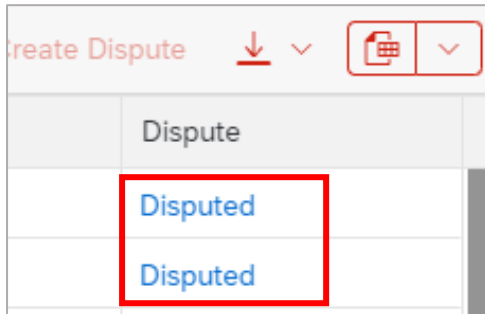
- 30. Press **OK**
- 31. It will revert you back to the previous screen showing open items, a Notification will appear to inform that Dispute has been created.



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32. To add an attachment select, locate the invoice and select **Disputed** within the Dispute column as shown.



33. From the next screen locate the section, **Attachments for Dispute**, select **Upload**.



34. Attached the relevant file from the computer, select **Open** to add this.

35. When uploaded, you can add a comment in the notes fields.

Guide Ends