

# Customer Portal User Guide



The 'My Account' tile menu option will bring you to your account detail page

To approve/reject squawks please click the more button then click on the "My Orders & Squawks" button from the dropdown.

To view the 'Portal PDF Guide' please click the more button then click the 'Portal Guide' button.

Note: "My Account" and "My Order & Squawks" are also available via the navigation tabs at the top of the screen.

Note: To view our company website, privacy policy or terms and conditions please click on the links at the bottom of the home page.

Account Test Customer Salesforce Trainings + Follow Printable View

Type Customer Phone Website Account Owner Ana Bianco Billing Address Easy street st johnss 1234545 Canada Parent Account

Account Name Test Customer Salesforce Trainings Parent Account Region Western Europe Country Latvia

Type Customer Market Fixed Wing/Rotary Wing Market Segment Commercial Market Sub-Segment General Purpose Inactive Account Currency GBP - British Pound Tax ID Number

Address Information Billing Address Easy street st johnss 1234545 Canada Phone Fax Website

Description Information Description

Orders (6+)

| Order Number             | Status | ERP Job Number | Product(s)           |
|--------------------------|--------|----------------|----------------------|
| <a href="#">00004976</a> | Open   | TA100730       | LEAP-1A Engine PR... |
| <a href="#">00004977</a> | Draft  |                | LEAP-1A Engine PR... |
| <a href="#">00004975</a> | Draft  |                | LEAP-1A Engine PR... |
| <a href="#">00004968</a> | Closed | YX101813       | LEAP-1A Engine CT... |
| <a href="#">00004880</a> | Draft  | 1234567        | A-5A Accy Exchang... |
| <a href="#">00004728</a> | Draft  |                | LEAP-1A Engine CT... |

View All

Related Contacts (5)

| Contact Name                          | Title | Functional Role | Email                  |
|---------------------------------------|-------|-----------------|------------------------|
| <a href="#">Test General Portal</a>   |       |                 | tyler.tobin@standar... |
| <a href="#">Ana Portal</a>            |       |                 | ana.bianco@standar...  |
| <a href="#">Test LEAP Portal U...</a> |       |                 | tyler.tobin@standar... |
| <a href="#">LEAP Test</a>             |       |                 | joe.mahon@standar...   |
| <a href="#">Tyler Test Tobin</a>      |       |                 | tyler.tobin@standar... |


View All

Files (0) Upload Files

This is the 'My Account' page. This page shows the detail page for your account along with all the field values.

You can click on any order in the related lists to be brought to that Order's detail page.

You can also view contacts and files that are related to your account.

Home My Account More  Test General Portal

All Orders Active Orders Pending Squawks

| View Order                 | ERP Job Number | End Customer                       | Serial Number | Product(s)  | CSM             | # of Customer Pending Squawks          | View All Squawks                 |
|----------------------------|----------------|------------------------------------|---------------|---|-----------------|--|----------------------------------|
| <a href="#">View Order</a> | TA100730       | Test Customer Salesforce Trainings | 42390TEC      | LEAP-1A Engine PRSV Light                                   | Joe Mahon       | 1 <a href="#">View Pending Squawks</a> | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | 11747/149      | Test Customer Salesforce Trainings | GE-E-343013   | 3rd-Party Mod/STC Mod / Upgrade / Conversion - Install Only | Scott Etchegary | 0                                      | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | 633/16         | Test Customer Salesforce Trainings | MLN_PNL_0689  | -77 Barrel Assembly Overhaul - Coating Loss (Cadmium)       | Scott Etchegary | 0                                      | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | 561/13         | Test Customer Salesforce Trainings | P118414       | -117 Afterbody Custom - Custom                              | Scott Etchegary | 0                                      | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | LV261631       | Test Customer Salesforce Trainings | CAG54207      | LEAP-1A Engine CTEM Light                                   | Keilah Cayayao  | 0                                      | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | YX101813       | Test Customer Salesforce Trainings | GE-E902108    | LEAP-1A Engine CTEM Light                                   | Ana Bianco      | 0                                      | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | RB100493       | Test Customer Salesforce Trainings |               | LEAP-1A Engine CTEM Light                                   | Keilah Cayayao  | 0                                      | <a href="#">View All Squawks</a> |

From the 'My Orders & Squawks' page you'll be able to view the Order's details by clicking the 'View Order' button.

Visit the "Pending Squawks" tab to view Squawks requiring review, across ALL of your orders.

If you have any pending Squawks for that order the 'View Pending Squawks' button will appear.

Use the "All Orders" tab to view all Orders and the "Active Orders" tab to view only Active Orders associated with your account.

Click the 'View All Squawks' button to see a complete list of Squawks associated with that order, regardless of the Squawks status.

Home My Account More ▾ StandardAero Test General Portal

Order 00004976 Following

Account Name: Test Customer Salesforce Trainings Status: Open Order Amount: USD 694,029.46

Order Details **Pending Squawks** Chatter

| <input type="checkbox"/> | Squawk Name              | Description        | Squawk Type        | Labor Cost | Material Cost |
|--------------------------|--------------------------|--------------------|--------------------|------------|---------------|
| <input type="checkbox"/> | <a href="#">SQ-01453</a> | SME Test Squawk #2 | Technical Variance |            | USD 2.00      |

Clear Selections Approve Reject

After clicking the 'View Pending Squawks' button on an order you will be brought to the Order Detail page with the pending Squawks tab already loaded up.

To approve/reject a Squawk, please check the checkbox on the left side of the squawk you wish to approve/reject.

Once a squawk has been selected for review, click the approve or reject buttons where applicable.

You can clear all selections by clicking the clear selections button.

To view the Squawk detail page click the Squawk name clickable link.

| <input type="checkbox"/> | Squawk Name              | Job Number               | Description        | Squawk Type        | Engine Serial # | Product(s)                | Labor Cost | Material Cost |
|--------------------------|--------------------------|--------------------------|--------------------|--------------------|-----------------|---------------------------|------------|---------------|
| <input type="checkbox"/> | <a href="#">SQ-01493</a> | <a href="#">JA100730</a> | SME Test Squawk #2 | Technical Variance | 42390TEC        | LEAP-1A Engine PRSV Light | USD 2.00   | USD 2.00      |

Clear Selections Approve Reject

This 'Pending Squawks' tab which is located on the 'My Orders & Squawks' page shows any pending squawks across all orders.

Please select the checkbox next to the squawk you want to approve

Once a Squawk has been selected for approval please click the approve or reject button.

Home My Account More

StandardAero Test General Portal

All Orders Active Orders Pending Squawks

| View Order                 | ERP Job Number | End Customer                       | Serial Number | Product(s)   | CSM             | # of Customer Pending Squawks | View All Squawks                 |
|----------------------------|----------------|------------------------------------|---------------|--|-----------------|-------------------------------|----------------------------------|
| <a href="#">View Order</a> | TA100730       | Test Customer Salesforce Trainings | 42390TEC      | LEAP-1A Engine PRSV Light  | Joe Mahon       | 1                             | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | 11747/149      | Test Customer Salesforce Trainings | GE-E-343013   | S-70 3rd-Party Mod/STC Mod / Upgrade / Conversion - Install Only | Scott Etchegary | 0                             | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | 633/16         | Test Customer Salesforce Trainings | MLN_PNL_0689  | -77 Barrel Assembly Overhaul - Coating Loss (Cadmium)            | Scott Etchegary | 0                             | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | 561/13         | Test Customer Salesforce Trainings | P118414       | 147 Afterbody Custom - Custom                                    | Scott Etchegary | 0                             | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | LV261631       | Test Customer Salesforce Trainings | CAG54207      | LEAP-1A Engine CTEM Light  | Keilah Cayaoyao | 0                             | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | YX101813       | Test Customer Salesforce Trainings | GE-E902108    | LEAP-1A Engine CTEM Light  | Ana Bianco      | 0                             | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | RB100493       | Test Customer Salesforce Trainings |               | LEAP-1A Engine CTEM Light  | Keilah Cayaoyao | 0                             | <a href="#">View All Squawks</a> |

To view the order detail screen please select the order you want to see and click the 'View Order' button.

Home My Account More

StandardAero Test General Portal

Order 00004976 Following

Account Name: Test Customer Salesforce Trainings | Status: Open | Order Amount: USD 694,029.46

Order Details Pending Squawks Chatter

Order Number: 00004976

Account Name: Test Customer Salesforce Trainings

End Customer: Test Customer Salesforce Trainings

Product Line: Engine MRO

Model: LEAP

Order Start Date: 25/06/2024

Job Information

ERP Job Number: TA100730

Part Number: 0292025170

Serial Number: 42390TEC

Status: Open

Order Amount: USD 694,029.46

Order Currency: USD - U.S. Dollar

CSM: Joe Mahon

PO Number

Received Date: 15/04/2024

Induction Date: 18/04/2024

Cycle 1 Completion Date: 13/06/2024

Test Complete Date

Actual Shipped Date

Order Products (1)

| Product                 | Quantity | Unit Price     | Total Price    |
|-------------------------|----------|----------------|----------------|
| LEAP-1A Engine PRSV ... | 1.00     | USD 694,029.46 | USD 694,029.46 |

Order Estimates (1)

| Order Estimate Name | Amount         |
|---------------------|----------------|
| EO-000154           | USD 694,029.46 |

Order Invoices (0)

Squawks (5)

| Squawk Name | Squawk Type        | Description        | Status                    |
|-------------|--------------------|--------------------|---------------------------|
| SQ-01454    | Technical Variance | SME Test Squawk #3 | Pending Internal Approval |
| SQ-01455    | Estimate           | Estimate Approval  | Internally Approved       |

You will then be taken to the screen shown in the second screenshot.

This screen has details and related records on the first tab.

Order Products, Estimates and Invoices are available for review under there respective related lists.

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StandardAero Test General Portal

Order 00004976 Unfollow

Account Name: Test Customer Salesforce Trainings | Status: Open | Order Amount: USD 694,029.46

Order Details Pending Squawks Chatter

Sort by: Most Recent Activity

Search this feed...

SQ-01455 - Matthew Power (Employee) created a squawk. June 27, 2024 at 1:35 PM

SQ-01455

Like Comment 1 view

Write a comment...

SQ-01454 - Scott Etchegary (Employee) created a squawk. June 26, 2024 at 10:35 AM

SQ-01454


The second tab contains the 'Pending Squawks' tab that was shown earlier this screen allows you to approve/reject squawks for this order.

The final tab is the 'Chatter' tab. This tab allows you to comment on Order or child squawks to provide key information and updates.

[All Orders](#) Active Orders Pending Squawks

| View Order                 | ERP Job Number | End Customer                       | Serial Number | Product(s)   | CSM             | # of Customer Pending Squawks          | View All Squawks                 |
|----------------------------|----------------|------------------------------------|---------------|--|-----------------|--|----------------------------------|
| <a href="#">View Order</a> | TA100730       | Test Customer Salesforce Trainings | 42390TEC      | LEAP-1A Engine PRSV Light                                      | Joe Mahon       | 1 <a href="#">View Pending Squawks</a> | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | 11747/149      | Test Customer Salesforce Trainings | GE-E-343013   | S-70 3rd-Party Mod/STC Mod/ Upgrade/ Conversion - Install Only | Scott Etchegary | 0                                      | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | 633/16         | Test Customer Salesforce Trainings | MLN_PNL_0689  | -77 Barrel Assembly Overhaul - Coating Loss (Cadmium)          | Scott Etchegary | 0                                      | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | 561/13         | Test Customer Salesforce Trainings | P118414       | -117 Afterbody Custom - Custom                                 | Scott Etchegary | 0                                      | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | LV261631       | Test Customer Salesforce Trainings | CAG54207      | LEAP-1A Engine CTEM Light                                      | Keilah Cayaoyao | 0                                      | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | YX101813       | Test Customer Salesforce Trainings | GE-E902108    | LEAP-1A Engine CTEM Light                                      | Ana Bianco      | 0                                      | <a href="#">View All Squawks</a> |
| <a href="#">View Order</a> | RB100493       | Test Customer Salesforce Trainings |               | LEAP-1A Engine CTEM Light                                      | Keilah Cayaoyao | 0                                      | <a href="#">View All Squawks</a> |

After clicking the 'View All Squawks' button on the 'My Orders & Squawks' page the following screen will be shown.

 ORDER 00004976  
Squawks  
3 items

| Squawk Name              | Status                    | Squawk Type        | Description        | Labor Cost   | Material Cost |
|--------------------------|---------------------------|--------------------|--------------------|--------------|---------------|
| <a href="#">SQ-01451</a> | Closed                    | Technical Variance | matts squawk       | USD 1.00     | USD 1.00      |
| <a href="#">SQ-01452</a> | Customer Approved         | Technical Variance | SME Test Squawk    | USD 1,000.00 | USD 1,000.00  |
| <a href="#">SQ-01453</a> | Pending Customer Approval | Technical Variance | SME Test Squawk #2 | USD 2.00     | USD 2.00      |

[Download To Excel](#)

You can click any of the squawk names to view the squawk detail page.

This page will show any squawks related to that order regardless of status.

Users can use the 'Download To Excel' button to download a list of squawks as an excel spreadsheet.

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Order 00004976 Following

Account Name: Test Customer Salesforce Trainings | Status: Open | Order Amount: USD 694,029.46

Order Details Pending Squawks Chatter

Order Number: 00004976 | Status: Open  
 Account Name: Test Customer Salesforce Trainings | Order Amount: USD 694,029.46  
 End Customer: Test Customer Salesforce Trainings | Order Currency: USD - U.S. Dollar  
 Product Line: Engine MRO | CSM: Joe Mahon  
 Model: LEAP | PO Number: [Redacted]  
 Order Start Date: 25/06/2024

Job Information  
 ERP Job Number: TA100730 | Received Date: 15/04/2024  
 Part Number: 0292025170 | Induction Date: 18/04/2024  
 Serial Number: 42390TEC | Cycle 1 Completion Date: 13/06/2024  
 Test Complete Date: [Redacted] | Actual Shipped Date: [Redacted]

Estimate Information  
 Total Estimate Amount: USD 694,029.46

Order Products (1)  

| Product                | Quantity | Unit Price     | Total Price    |
|------------------------|----------|----------------|----------------|
| LEAP-1A Engine PRSV... | 1.00     | USD 694,029.46 | USD 694,029.46 |

Order Estimates (1)  

| Order Estimate Name | Amount         |
|---------------------|----------------|
| OE-000154           | USD 694,029.46 |

Order Invoices (0)

Squawks (5)  

| Squawk Name | Squawk Type        | Description        | Status                    |
|-------------|--------------------|--------------------|---------------------------|
| SQ-01454    | Technical Variance | SME Test Squawk #3 | Pending Internal Approval |
| SQ-01455    | Estimate           | Estimate Approval  | Internally Approved       |
| SQ-01453    | Technical Variance | SME Test Squawk #2 | Pending Customer Appr...  |
| SQ-01452    | Technical Variance | SME Test Squawk    | Customer Approved         |

In Order to view the squawk detail page head to the order that the squawk is a child of. Do this by clicking the 'View Order' button.

On that Order detail screen in the related lists, please click on the Squawk Name for which you wish to review.

This is the Squawks detail page. On this page you can see record details.

In order to see related record lists please click on the 'Related' tab.

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Squawk SQ-01454 Following

Record Details Related

Squawk Name: SQ-01454 | Order: 00004976 | Squawk Type: Technical Variance | Description: SME Test Squawk #3

Additional Details  
 CSM: Joe Mahon | Internal Approver: Scott Etchegary | Customer Approver: Test General Portal

Status: Pending Internal Approval | Days Open: 29 | Closed Date: [Redacted]  
 Last Status Changed Date: 26/06/2024 | Reason for Cancellation: [Redacted]  
 Job Number: TA100730 | Engine Serial #: 42390TEC | Labor Cost: USD 3.00 | Material Cost: USD 3.00 | Expected TAT Impact: 3

Post  
 Share an update... Share

Search this feed... Filter Refresh

Scott Etchegary (Employee) created this squawk. June 26, 2024 at 10:35 AM

SQ-01454 View more details

Like Comment 2 comments 3 views

More comments 1 of 2

Tyler Tobin (Employee) a month ago  
 Test internal comment  
 Like

Write a comment...

On the right side of the screen chatter is available for use. You can use this area to post or comment on this squawk with key updates and information.

Note: Posts made here are visible to the applicable Customer Service Representative.