

# CLIENT PORTAL GUIDE

*How to place  
service calls, report  
meters, and order  
supplies online*

[www.ubti.com](http://www.ubti.com)



## SERVICE AND SUPPLY CONTACT OPTIONS

	Phone	Email	Online Portal
Service Calls	877.917.0100 – option 1	<a href="mailto:dispatch@ubti.com">dispatch@ubti.com</a>	<a href="http://e-info.ubti.com/einfo/Gateway/Login">http://e-info.ubti.com/einfo/Gateway/Login</a>
Supply Orders	877.917.0100 – option 2	<a href="mailto:ubtsupplies@ubti.com">ubtsupplies@ubti.com</a>	<a href="http://e-info.ubti.com/einfo/Gateway/Login">http://e-info.ubti.com/einfo/Gateway/Login</a>

When calling or emailing, please include the following information: Your 5-digit equipment ID number, company name and address, issue the device is experiencing or toner needed, along with your name, phone number, and email address.

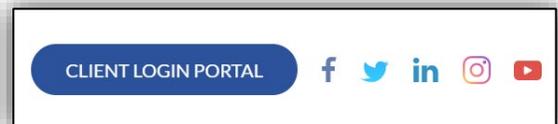
## CLIENT PORTAL GUIDE

United Business Technologies provides an easy online process to place service calls, enter meter reads and order supplies via UBT's Customer Login site found at [www.ubti.com](http://www.ubti.com) / 24hrs day.

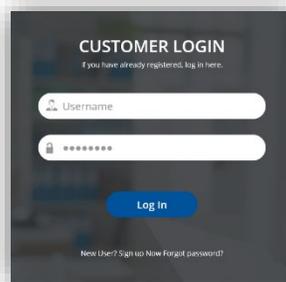
To access the Client Portal:

Logging in for the first time? Please submit your request for credentials at: <https://www.ubti.com/customer-login-registration-request>

Step 1: Using your web browser go to [www.ubti.com](http://www.ubti.com) and select Client Portal.



Step 2: Login with your username and password credentials.

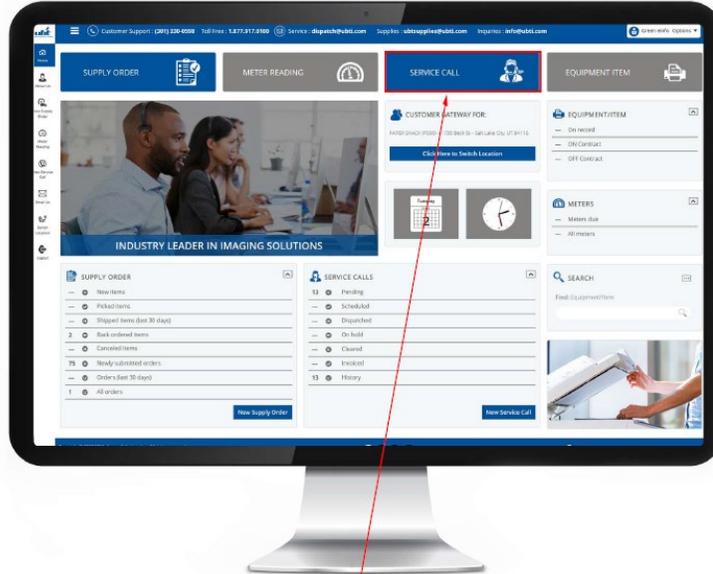


Step 3: Once your account has been created, you will be able to login and view your Meters, Supply Orders, Service Calls and Equipment Summary. Here you can also place calls for service or supplies and enter meter readings.



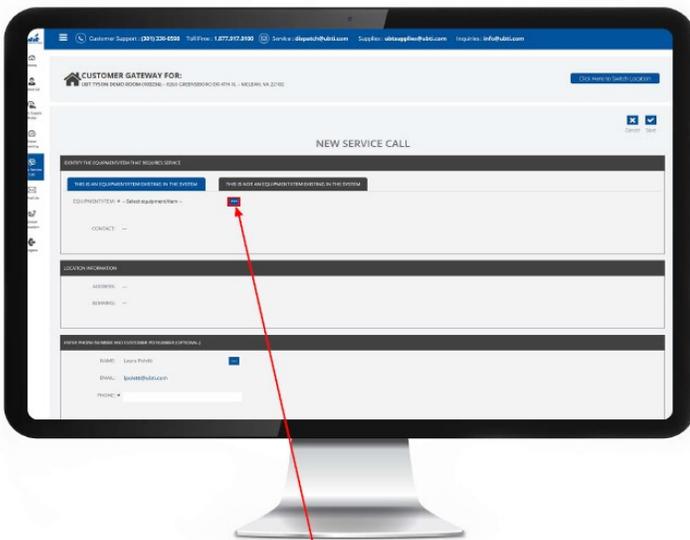
**To Place a Service Call:**

**Step 1: Click on Service Call:** On the Dashboard screen, click on Service Call button.

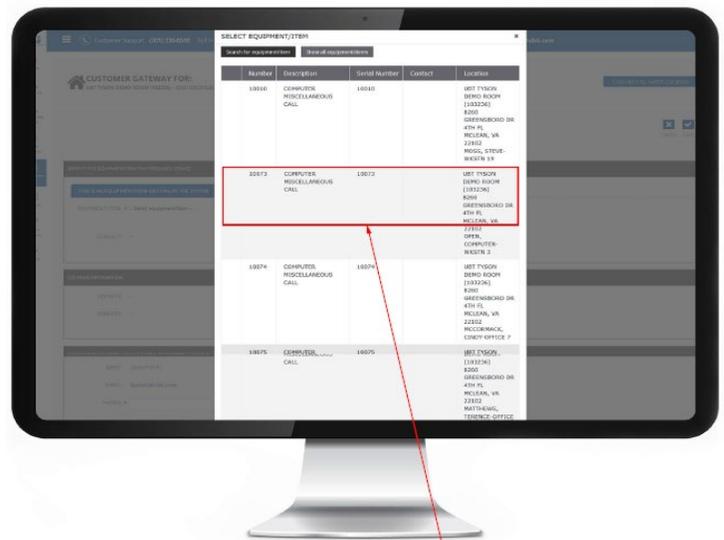


Service Call Button

**Step 2: Select Equipment/Item that needs service:** On the Service Call screen, click on --Select equipment/item-- to choose the equipment that needs service.

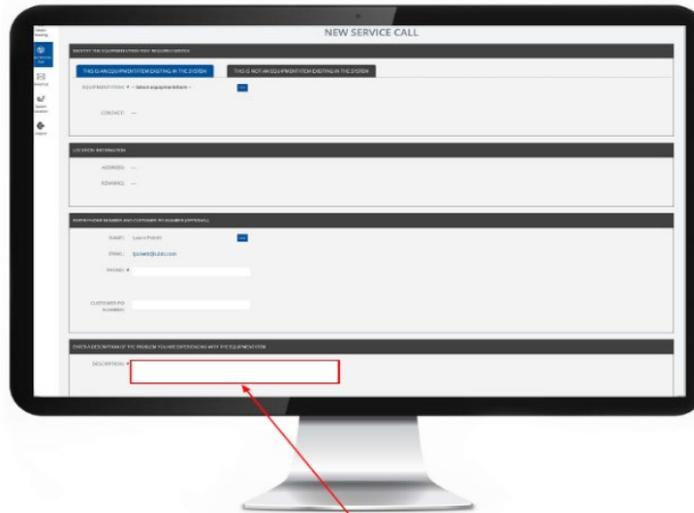


Click here to open the popup with your equipment listed.



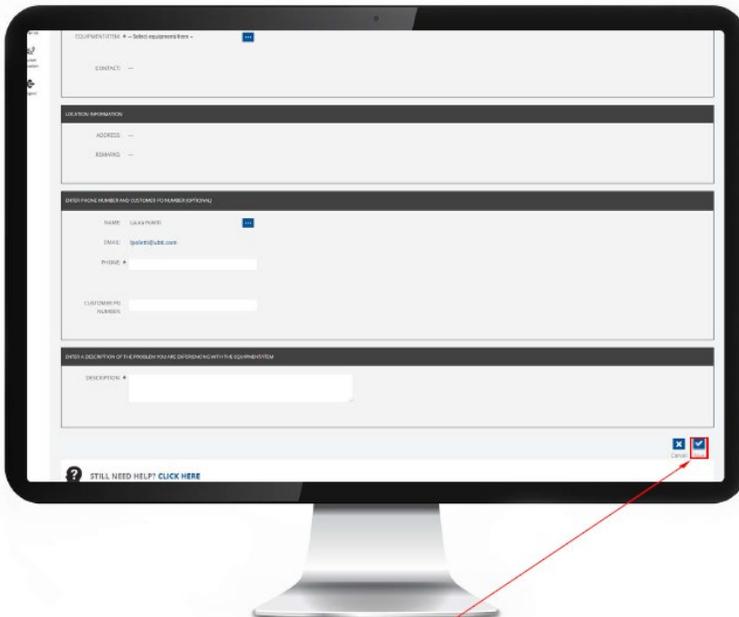
Click the equipment that needs service

Step 3: **Enter Description:** Enter the issue you are having in the Description box.



Type your issue here.

Step 4: **Click Save:** Click the Save button to submit your Service Call.



Click here to save your information

You can check your service call status at any point — the different categories are below:

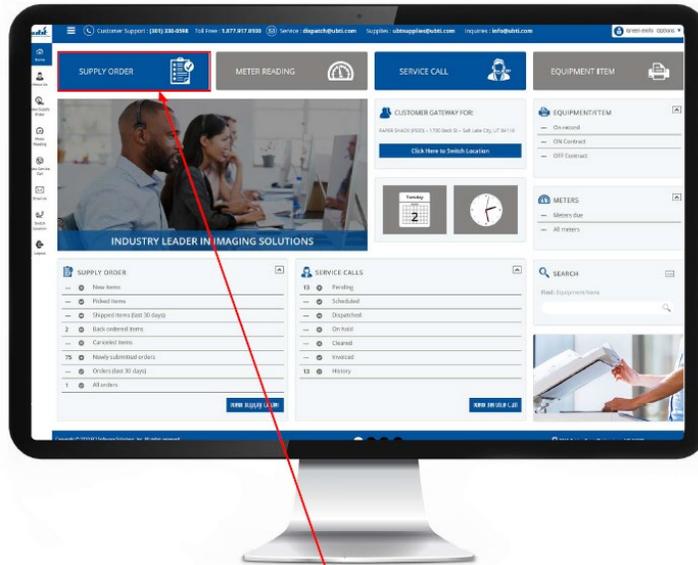
- Pending Calls:** A service call entered in the system but not yet scheduled or dispatched.
- Scheduled Calls:** A service call that has been scheduled to be dispatched at a defined date and time.
- Dispatched Calls:** A technician has been assigned and dispatched to the equipment location.

Once the call is placed it will immediately be distributed to a certified technician. Response-time requirements and geographic location are determining factors. You will receive an email confirming the call status and providing an estimated time of arrival.

The technician will arrive within the guaranteed specified response time to diagnose the problem and perform preventative maintenance required at that time. The technician will follow-up with the on-site contact before departing. The technician will clear all call data through their smartphone which updates service records immediately.

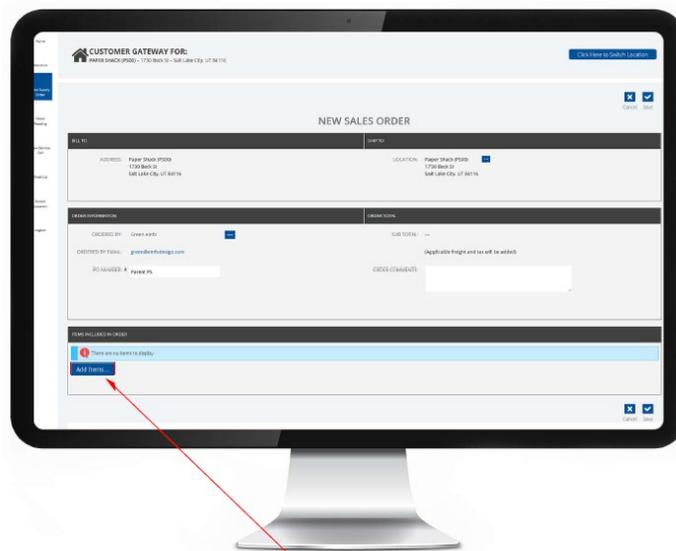
### To Place a Supply Order:

Step 1: **Supply Order Button:** On the Dashboard screen, click on the Supply Order button.



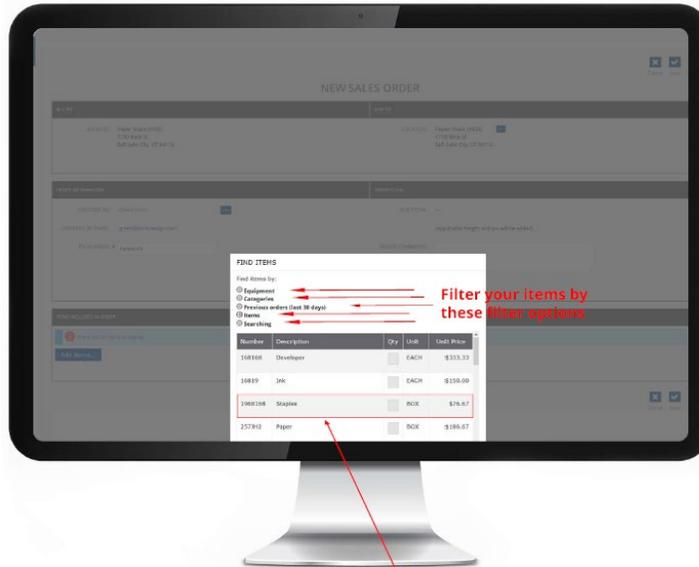
Supply Order Button

Step 2: **Click Add Items:** On the Sales Order screen, click the Add Items button.



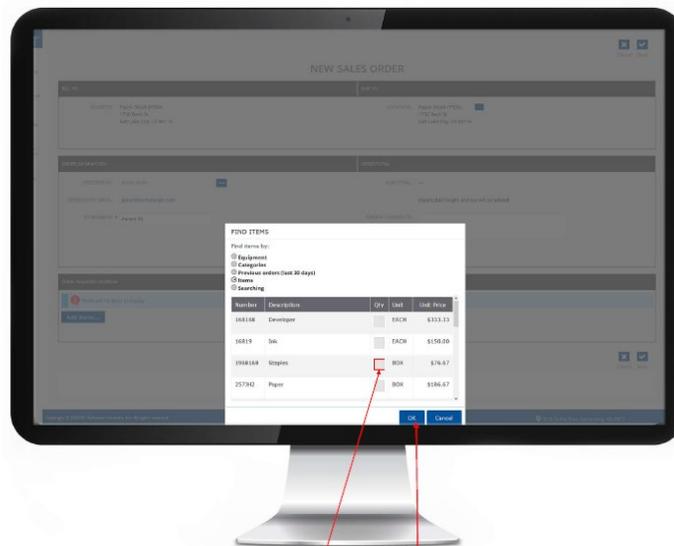
Add Items Button

Step 3: **Choose how you want to find your item:** On the popup, choose how you would like to find the item you are looking for.



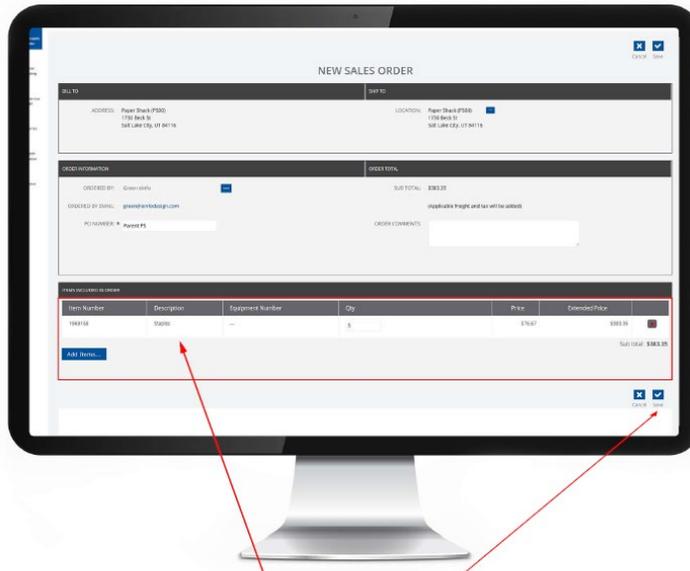
Choose the equipment you need supplies for.

Step 4: **Enter the quantity you would like to order:** On the new popup, enter the quantity you would like to order. Then click the OK button.

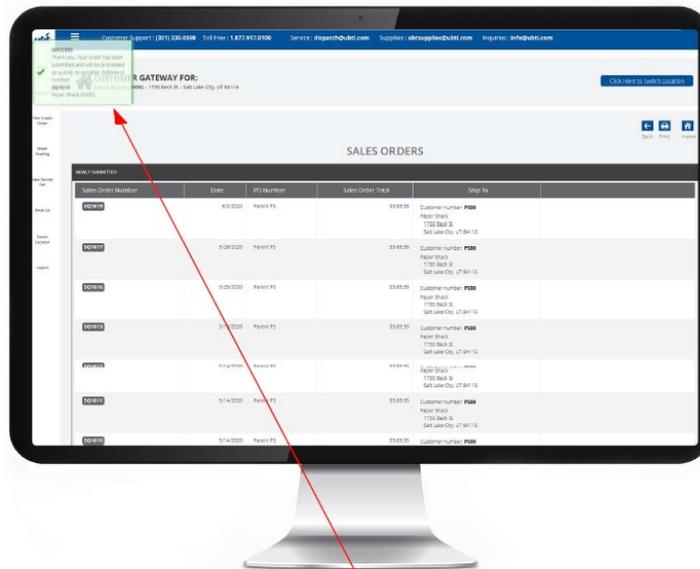


Enter the quantity and click ok

Step 5: **Click Save:** Once you have added all the items you would like to order, click the Save button. You will get a Thank You popup confirming your order was submitted.



Click Save after verifying the items you want to order.

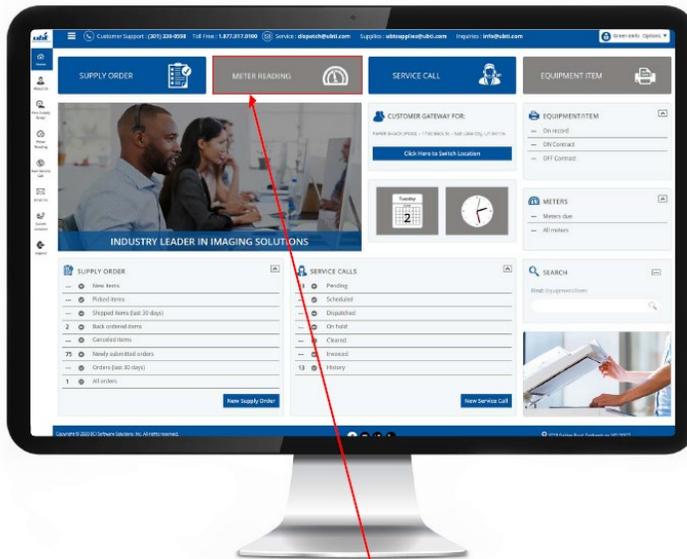


This successful message will appear

After placing a supply order via the automated supply line or from our website, it should take approximately two to three business days from the day your order was processed for your products to arrive. If you place your order by 2:30pm, it will be processed and shipped out same-day via UPS. All orders placed after that time will be processed and shipped out the next business day. If you need same-day delivery, please call our Supply Department directly at 301.330.0598 to request courier service for a nominal charge to your account.

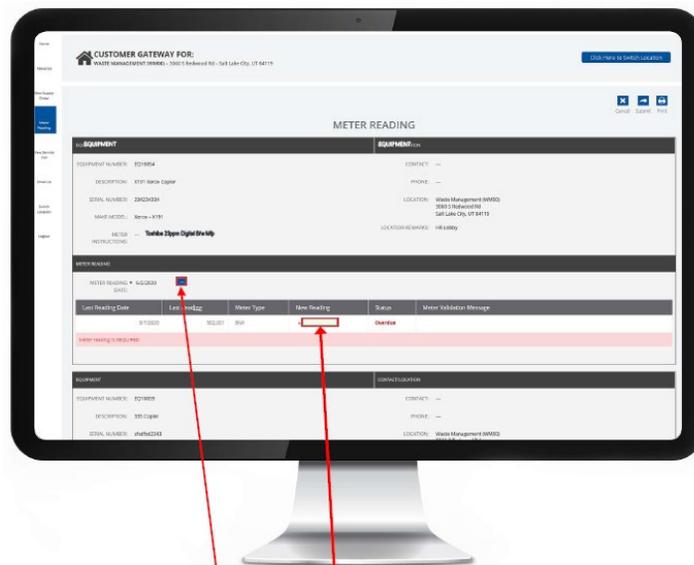
To Submit a Meter Reading:

Step 1: **Navigate to the Meter Reading Button:** On the Dashboard screen, click on the Meter Reading Button.



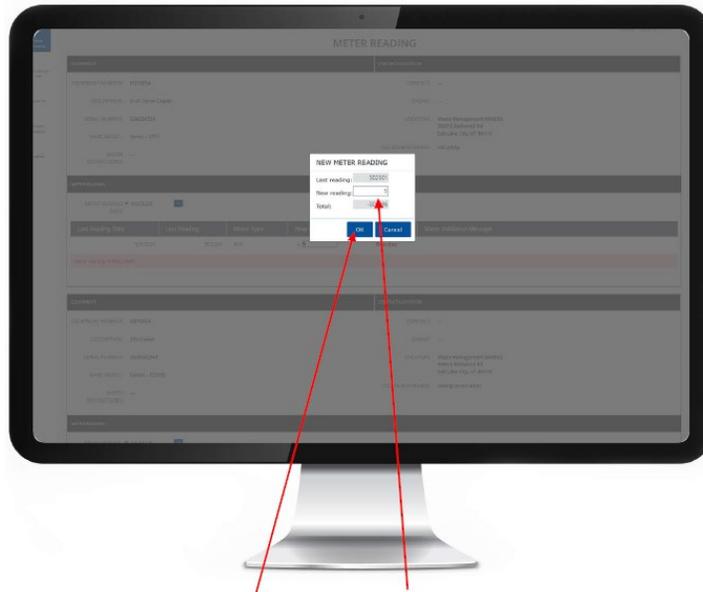
Meter Reading Button

Step 2: **Locate the machine you are submitting a meter for:** On the Meter reading page, scroll to the machine you want to submit a meter for. Choose the date you read the meter.



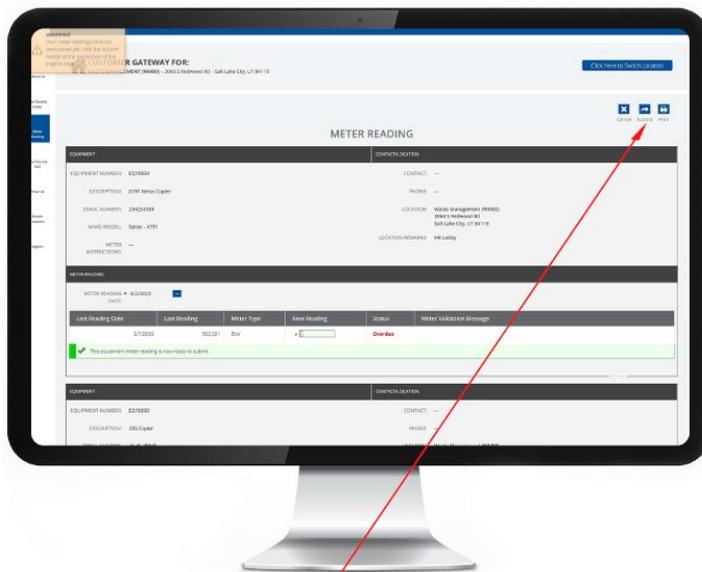
Select the date and meter reading text area

Step 4: **Type new meter reading in:** Type the meter in the New Reading box. This will generate a popup. Click OK to close the popup.



Enter the reading in the text box and click ok

Step 4: **Click Submit:** Click the Submit button at the top or bottom of the page to save your meter reading.



Click on the Submit button

### Canon Customers – imageWARE Remote Capabilities

Your device is equipped with imageWARE Remote which allows your device to communicate relevant information about your device to UBT. Unless you have specifically opted out of this service, imageWARE Remote will automatically provide meter data to UBT for billing purposes. It will also notify UBT when your device reaches low toner levels which allows us to automatically ship toner to you before you need it with no action required on your part. If imageWARE Remote cannot communicate to UBT due to security restrictions on your network, you will need to either call or go online to request toner shipments. See enclosure for a more in-depth description of imageWARE Remote.