

How to use and what you can do with Customer Service Portal

How to effectively use your account to organize your purchases on Account?

The Kooyman Customer Service Portal provides access to account information to monitor all purchases on account, Pre-Paid as well as Credit account, and supports you manage your outstanding balances.

In this “How to manual” information on:

- 1. How can I log in into the Customer Service Portal and manage my account**
- 2. How to manage access of authorized persons and PRO Card holders to my account**
- 3. How to monitor outstanding balances**

1. How can I log in into the Customer Service Portal and manage my account

How can I log into my Customer Service Portal account?

Go to: <https://kooyman.microsoftcrmportals.com/>

Log in with your provided username and password

I've lost my password, how can I reset my password?

If you forgot your password, go to the home screen and click on the link “click here to reset your password”.

If you know your username fill in your username and e-mail address and click on the button “reset password”. Here you will be able to enter a new password, which will be effective immediately.

If you don't know your username, enter your e-mail address to have it mailed to you.

How can I change my password?

You can change your password in the menu option “My settings”

Passwords require a combination of letters and numbers and are capital sensitive.

How can I change my contact information?

When you are logged in you can edit your contact information in the menu option “My Account”.

The registered e-mail address will be used for correspondence regarding Customer Service Portal questions and mutations that have been sent to our Credit department and for confirmation about changes.

2. How to manage access of authorized persons and PRO Card holders to your account

How can I manage who is authorized to charge my account?

You can manage your account on the “Authorizations” page.

Here you can add/delete/change contacts. These changes will be effected immediately in our Point Of Sale system. The account holder/admin of the customer account is responsible for the correct information.

Important! Please note all required fields need to be filled out. These are: First Name, Last Name, Email, ID Type, ID Number and Phone.

Can I assign a contact to a job?

Yes, it is possible to add contacts by job. Select “Authorizations” in the Menu button. Click on the dropdown behind the contact. Select a job or multiple jobs in the menu and click “Submit”. Then the contact will be added to the job.

What identification is necessary to verify the authorized contact at the cash register?

Authorized persons with a PRO Card don’t need an additional ID at the cash register. Other contacts will have to identify to the clerk with his/her ID.

3. How to monitor outstanding balances

Where can I find information of my current balance?

On My Account under the header Financial Details

What information can I see on the balances page?

Current Total Due	Purchases now due + Due next Statement
Credit Limit	Agreed Credit Limit
Available Credit	Actual available Credit
Last Payment Amount	What was the last payment amount
Last Payment Date	When was the last payment received
Last Statement Balance	Closing balance on the last received statement
Total Due	Your current balance (Purchases – Payments - credits)
Due Now	Your current balance (Purchases – Payments - credits) that needs to be paid
YTD Sales	Total revenue on this customer during this calendar year
Aging 1-30, 31-60,61-90, over 90 days	Invoices that are overdue and how many days

Where can I find my statements?

Go to the page “Statements”

How can I look up detailed information in a statement?

In your online statements you find an overview of payments/invoices/orders/credits/adjustments, by store booked in the selected period.

In the “Reference” column you can view the Invoice documents by clicking on the PDF icon.

Why do I see an amount of 0.00 in the “Credit” and “Amount” column?

When u see an Invoice on your statement with a “0.00 Credit and Amount” column this means that the Invoice is part of a split Order.

For example when you purchase a hardware and yard item, the yard item stays on Order until it physically leaves the Drive Thru. The hardware item is sold by the cashier immediately. Because Kooyman offers customers to pick up their yard item on a date/time that’s convenient for them, it is possible that the split order can be sold in a period other than that of the original order.

On the statement the total amount on the original Order will be debited. It will also show the split invoices and detailed information but with a “0.00” Credit Amount

What type of documents can I find on the My Documents page?

Relevant uploaded information e.g. contracts and agreements.

Can I export one or multiple documents?

By clicking on the Export button in the “Transactions”, “Transaction Lines” and “Statements” page you can export all the documents in your applied filter to Excel (csv).

Can I print one or multiple documents?

You can print one or multiple documents by selecting the documents you want to print and click

What information can I find on the “Deliveries” page?

All Sales that have been invoiced on this account with the total amount. These are products that have been received by the customer

How can I filter my sales history per item?

If you know the item number you can fill in the item number on the tab “Transaction Lines” in the field “search”, select the button

“Display Items” and click the “Search” button.

If you don’t know the Item Code click on the icon. Type in the name of the product and click “search”

Select the Item you want to see and the item number will appear in your search criteria. Select the button “Display Items” and click the “Search” button.

You will now see all sales of that specific item with the quantity and price per unit (Tax excluded)

Can I export my sales history?

By entering the required search criteria you can export the sales data by clicking on the Export button in the “Transaction Lines” page. The data will be exported to Excel. In Excel you can apply formulas to calculate the total sales for example.