

Getting started with the Apex Partner Portal

The five things you will do most

Everything else in the portal is a variation on these five. Each has its own page in this guide, with a screen sketch and numbered steps.

1	Place an order	Pick a Meridian product, a location, a date, and any service add-ons. Orders > New order	PAGE 2
2	Track status	See every open order, its stage, and the carrier tracking link. Orders > All orders	PAGE 3
3	Request service	Log a fault against a serial number, set urgency, and ask for a loaner. Service > New request	PAGE 4
4	Manage users and locations	Invite colleagues, set their role, and keep ship-to addresses current. Settings > Users, Locations	PAGE 5
5	Get help	Fix the common sign-in and ordering snags yourself, or reach a person fast. Help > Support	PAGE 6

BEFORE YOU START

1. Find the invitation email from **portal@apexinstruments.example**. It is sent when Avery Kellen's team adds you as a user.
2. Open the link, set a password, and confirm your mobile number for sign-in codes.
3. Sign in at **apexinstruments.example/portal**. Bookmark it. The portal works in any current browser and on a phone.

Placing an order

A complete order takes about three minutes. The portal will not let you submit until the five required items are filled, so nothing waits in a hold queue later.

1 Open Orders and choose New order

Orders is the second item in the left menu. The New order button sits at the top right of the list.

2 Pick the product and configuration

Choose Bench, Pro, or Field Kit. The configuration chips fill with your location defaults; change any that differ for this order.

3 Set ship-to, need-by date, and priority

Pick a location from your list. Standard delivers in 5 business days, Priority in 2. The date you enter drives the route we choose.

4 Add service add-ons

Tick calibration, an Atlas plan, or training now so a technician is booked before the unit ships.

5 Enter your PO and submit

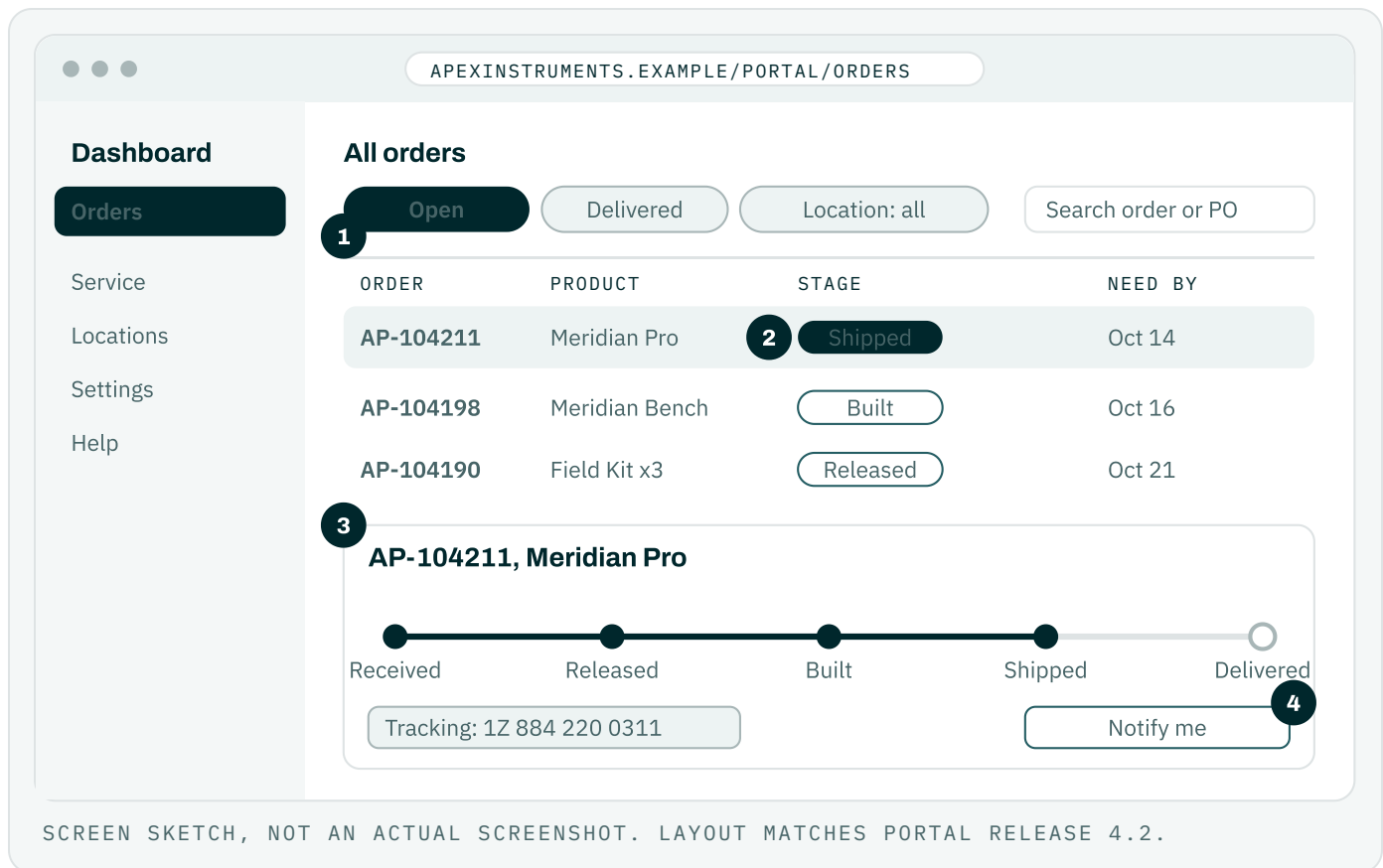
The PO field is required if your account uses them. You will see an Apex order number on screen and by email within 2 hours.

GOOD TO KNOW

Orders can be saved as drafts. A draft keeps its configuration for 30 days, which is handy when purchasing still needs to issue the PO.

Tracking status

Every order moves through five stages. The list view shows the stage for all open orders at once; opening an order shows the full timeline and the carrier link.



1 Filter the list

Open shows everything not yet delivered. Narrow by location, or search by Apex order number or your own PO.

2 Read the stage chip

Received, Released, Built, Shipped, Delivered. A solid chip means the stage is current; an outlined chip means it is pending.

3 Open the order for the timeline

The timeline shows the date each stage was reached, the technician booked for add-ons, and the carrier tracking number once shipped.

4 Turn on notifications

Notify me sends an email or text at each stage change. Set it once per order, or for all orders under Settings.

GOOD TO KNOW

If an order has been in Received for more than one business day, something on the five required items is missing. Open it and look for the amber banner at the top.

Requesting service

Log a fault against a unit's serial number and the service desk acknowledges within one business hour. Atlas Care Plus accounts can ask for a loaner in the same request.

SCREEN SKETCH, NOT AN ACTUAL SCREENSHOT. LAYOUT MATCHES PORTAL RELEASE 4.2.

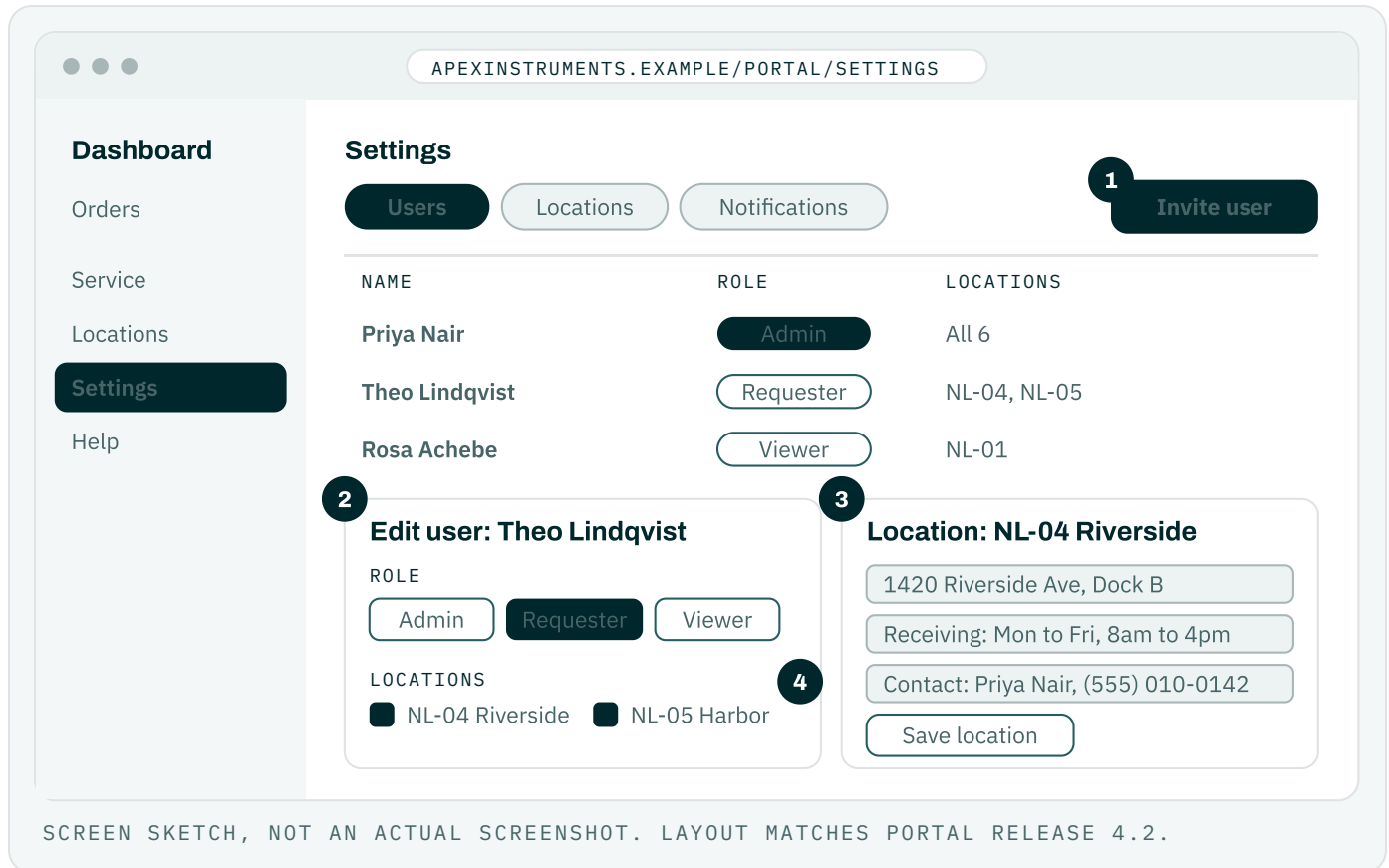
- 1 Find the unit by serial**
Type the serial from the plate on the back of the unit. The portal fills the model, location, and warranty or Atlas plan status.
- 2 Set urgency honestly**
Low means the unit still works. Unit down means it does not. Safety means someone could be hurt; that one also pages the on-call lead.
- 3 Tick symptoms and describe the fault**
Tick every box that applies, then add two or three sentences: what you saw, when it began, what you tried.
- 4 Ask for a loaner and choose return shipping**
Atlas Care Plus ships a loaner next business day. Prepaid label is the default; use your own carrier only if your site requires it.
- 5 Submit and note the ticket number**
Tickets look like SR-30412. Quote it when you call the service desk at (555) 010-0100, option 2.

GOOD TO KNOW

Calibration is a service request too. Choose Low urgency, tick Reading drift, and the desk schedules a 3 business day lab calibration for \$180.

Managing users and locations

Administrators keep the portal tidy from one Settings screen. Users get a role; locations get a receiving contact; each user is assigned to the locations they may order for.



1 Invite a user

Enter a work email. The invitation lasts 7 days. Up to 25 users per location; ask Avery Kellen's team if you need more.

2 Give each user a role

Admin manages users and locations. Requester places orders and service requests. Viewer can see status but change nothing.

3 Keep locations current

Each location needs a full address, receiving hours, and a receiving contact. Our carrier calls that contact before delivering.

4 Assign users to locations

A Requester only sees the locations ticked here. This is how multi-site partners keep orders from landing at the wrong building.

GOOD TO KNOW

When someone leaves, deactivate rather than delete. Their past orders stay attached to their name, which matters for audits.

Troubleshooting and support

Most snags have a thirty-second fix. Try the matching line below first; if it does not clear, a person is one call away during business hours.

I never received the invitation email	Check spam for portal@apexinstruments.example. Still nothing after 10 minutes? Your administrator can resend from Settings, Users, or call Avery Kellen's team.
The sign-in code does not arrive	Codes go to the mobile number on your profile. Wait 60 seconds before requesting another. If the number is wrong, an Admin can correct it.
Submit order is greyed out	One of the five required items is empty: product, configuration, ship-to, need-by date, or PO. The missing field is outlined in amber.
I cannot see a location I order for	You are not assigned to it. Ask an Admin to tick the location under your user profile. It appears within a minute.
An order has sat in Received for more than a day	Something on the order needs clarifying. Open it and read the banner, or call the orders desk with the AP number.
The serial number is not recognised	Serials start with MB, MP, or MF followed by four digits, a dash, and four more. If the unit was bought before your portal account existed, the service desk can attach it.
I need to change an order after submitting	Orders can be edited until they reach Released. After that, call the orders desk; changes may reset the turnaround clock.
The portal looks wrong on my screen	The portal supports current versions of Chrome, Edge, Safari, and Firefox. Clear the cache or try a private window before calling.

ORDERS DESK

(555) 010-0100, opt 1

orders@apexinstruments.example.
Order changes, PO questions, delivery windows.

SERVICE DESK

(555) 010-0100, opt 2

service@apexinstruments.example.
Faults, loaners, calibration bookings.

PORTAL ACCESS

Avery Kellen

(555) 010-0106,
akellen@apexinstruments.example.
Invitations, roles, training sessions.

SUPPORT HOURS

Monday to Friday, 8am to 6pm Eastern

Unit down and Safety requests submitted through the portal page the on-call lead outside these hours.

Portal is available every day, all hours