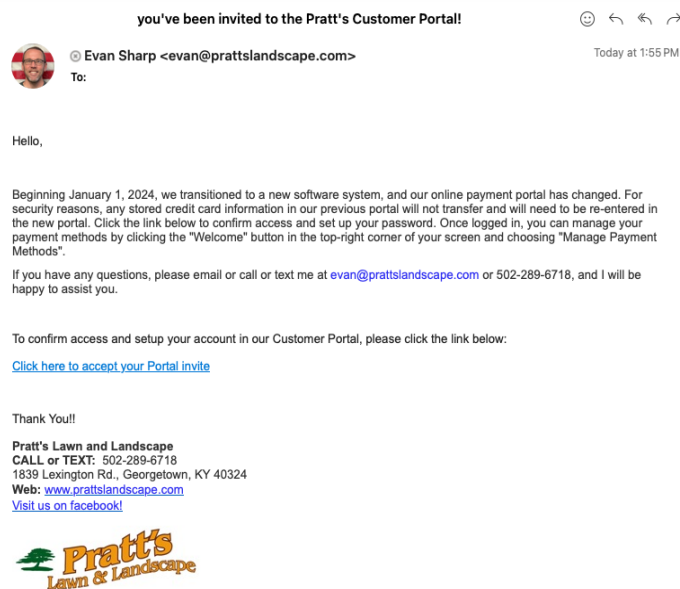# USING THE CUSTOMER PORTAL

Table of Contents

Purpose

Read this helpful step by step to explain some of the features in the company's portal to help you understand what's available to you as you do business together.

Receiving an Invite to the Customer Portal

Customer Portal Invite links are **valid** for 30 days once they are sent. If 30 days have passed, and you never used your invite link, you'll have to **request** a new *Portal Invitation Email* from the company that **sent** you the portal invite.

Example of Customer Portal Invitation email:

When **accepting** the portal invitation in the email, you'd **set** your password and **bookmark** the URL for the Customer Portal, so you can log in whenever you want to review proposals or invoices.

After your password is **set**, you will be redirected to the login page. You can then **log in** to your portal account for the first time.

Logging Into the Customer Portal

To log into the portal, you will **enter** the email address that the portal was accepted from, complete with the password that you **created** at the time of sign up. Once you are logged in, your dashboard will be displayed.
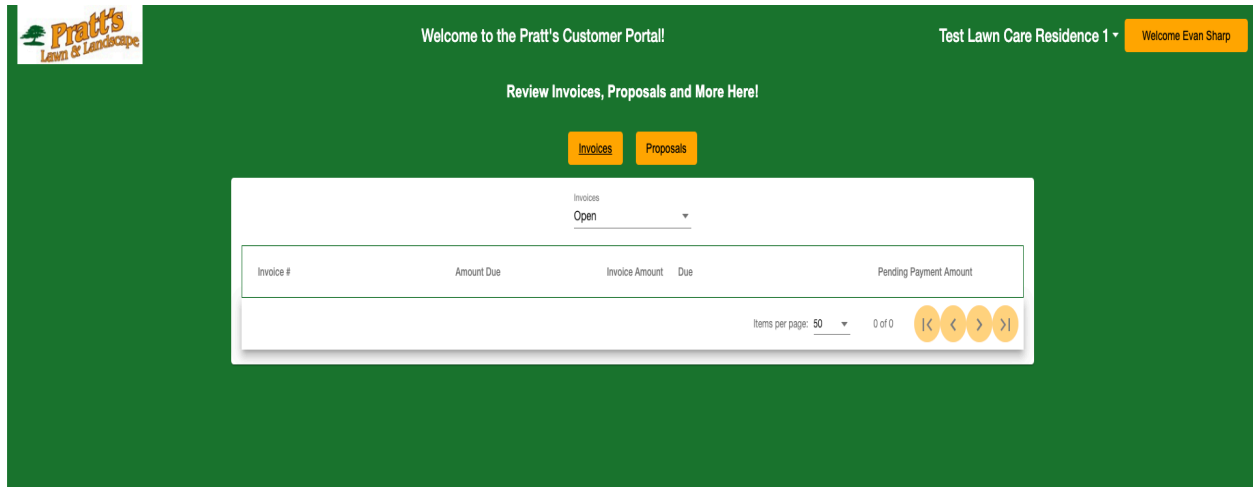
Reset Password

If you cannot remember your password, you can **request** a new password on the login screen by **selecting** *Forgot Password?*

📌 **Note:** The company that manages your customer portal **cannot see** your passwords; it's up to you to **reset** your password if you do not have access to your old password.
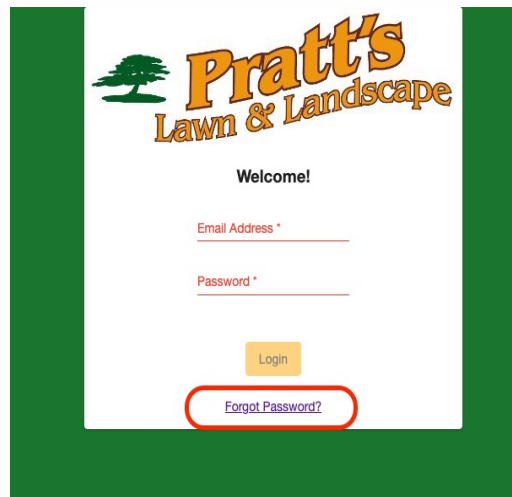
The login email needs to be the same as the email you **registered** with at the time of **accepting** the portal invite to **receive** the *Password Reset* email.

If you change your email address, you will need to reach out to the company that manages the portal to update your information. If you are already portal verified, then as long as your email address is updated, then you would be able to log in with your updated email address.

Troubleshooting

If you **click** the link to reset your password for your account and you never receive this email, **confirm** by phone or email to the company you are doing business with to see if you are *Customer Portal Verified*. This means that you have **accepted** your invite to join the customer portal and have set a password.

If you are not *Customer Portal Verified*, you will not get a password reset email. You would have to **accept** the initial portal invite *first*, and then, **set** a password. Initial invites are good for 30 days, if you have an invite older than 30 days, the company managing the portal should **resend** you the invite to create a portal account.

Features of Your Customer Portal

Once you **accept** your invite to **create** a new account to access the *Customer Portal*, there are many things you can do once you log in.

We will go over the self-serve features that the customer portal offers so you can understand what can do on your own:

- **Manage** payment methods
- **View** and **sign** *Proposals*
- **View** and **pay** *Invoices*
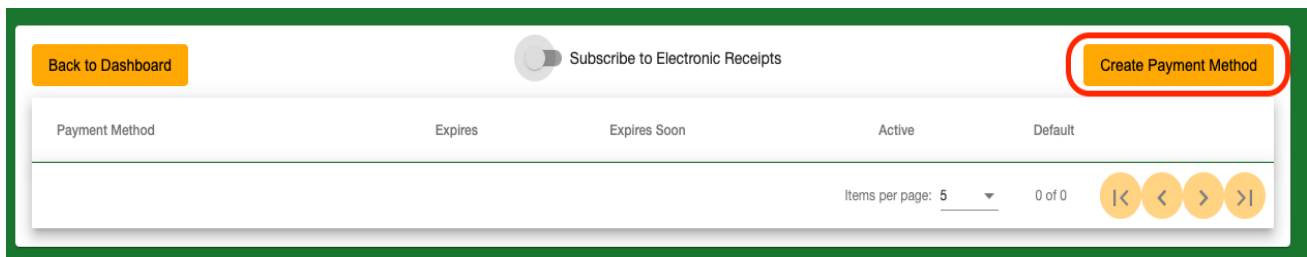- **Manage** multiple properties

Managing Payment Methods

In the customer portal, you may have the option to **add** your own payment methods. If this option is not available to you, **you can go to the next section**.

- To **add** a payment source, **click** the *Welcome* button and then *Manage Payment Methods*.
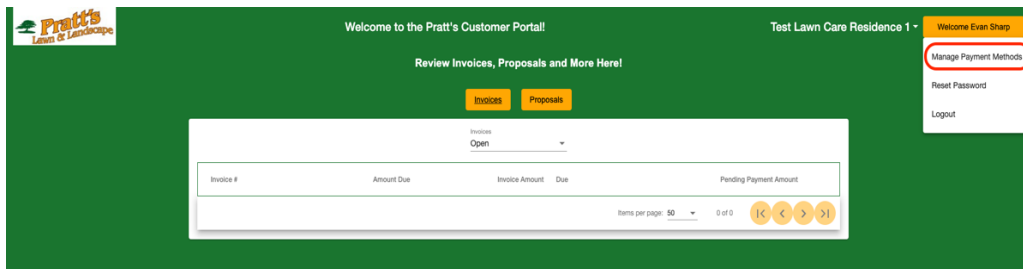
- **Click** *Create Payment Method* to **add** a new payment source.

ACH/eCheck

⚠️ If the company you are doing business with does not accept ACH/eChecks, you **should not add** an ACH payment source in the portal and **attempt** to make a payment.

To **add** a new ACH payment method, **select** the *Create Payment Method* box, then under the payment type drop down, **choose** *ACH/eCheck*.

- Under the Routing/Account Number, **enter** your bank information separating the routing and the account number with a "/".

⚠️ No spaces or special characters besides "/" should be used in this box.

- After **entering** the bank information, you can decide to make this a default payment method by checking the *Default Payment Method* checkbox.

- When all information is entered, **select** *Create Payment Method*.

Credit Card

For credit card payments inside of the customer portal, **select** the payment type of credit card, and **enter** the details to save your card onto your customer portal account. Then, this card could be **used** for future transactions.

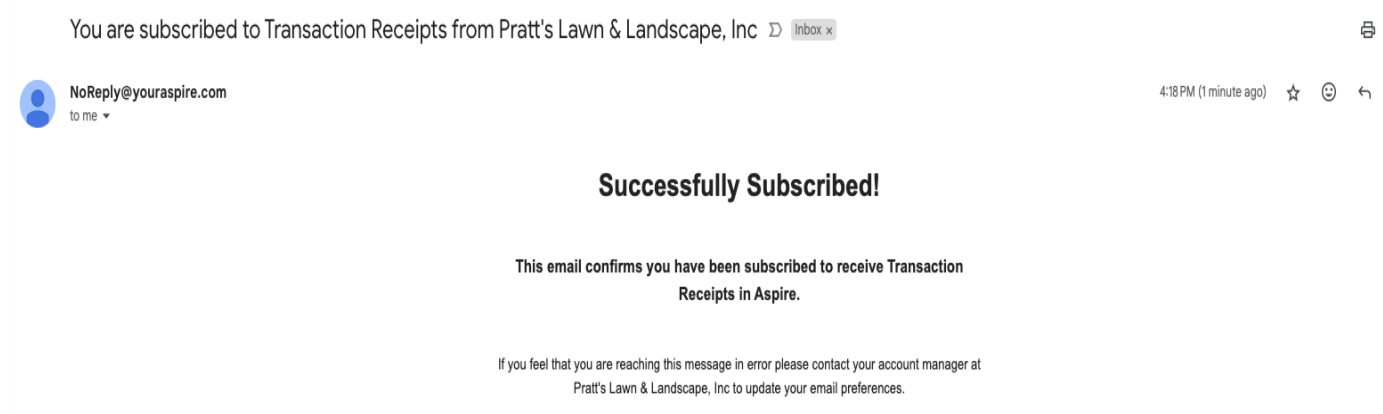# Subscribing to Electronic Receipts in the Customer Portal

You have the option to **subscribe** to *Electronic Receipts* in the Customer Portal. This option can be turned on from the *Manage Payments* screen under the *Welcome* button.
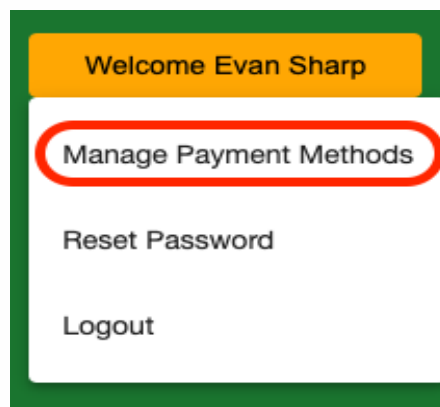
- If this is turned on, you would get an automatic email **notifying** you that you've opted in to receive *Electronic Receipts* when payments are **completed**.
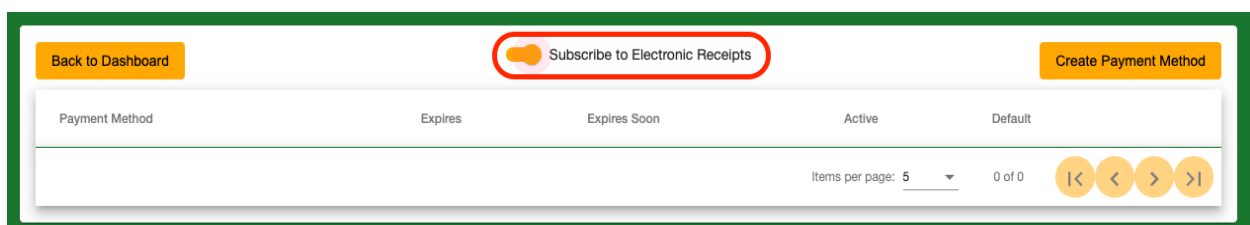
Here is an example email of what you'd **receive** when turning this button on for *Electronic Receipts*:

You are subscribed to Transaction Receipts from Pratt's Lawn & Landscape, Inc ∑ Inbox x

NoReply@youraspire.com
to me ▾

4:18 PM (1 minute ago)

Successfully Subscribed!

This email confirms you have been subscribed to receive Transaction Receipts in Aspire.

If you feel that you are reaching this message in error please contact your account manager at Pratt's Lawn & Landscape, Inc to update your email preferences.

- Now, when a payment is **made** with the payment source on file, you would automatically get a receipt for the amount paid.
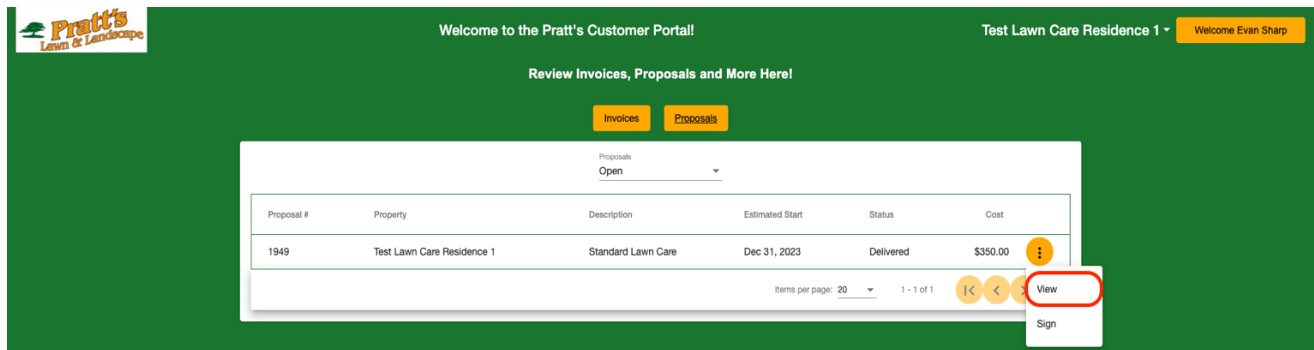
Viewing and Signing Proposals

📌 **Note:** If you do not **see** *Proposals* displayed in the customer portal, **you can skip this section.**

When you need to **review** line-item details inside of your customer portal account, **click** the vertical three dot icon within the *Invoices, Proposals,* or *Issues tabs*.
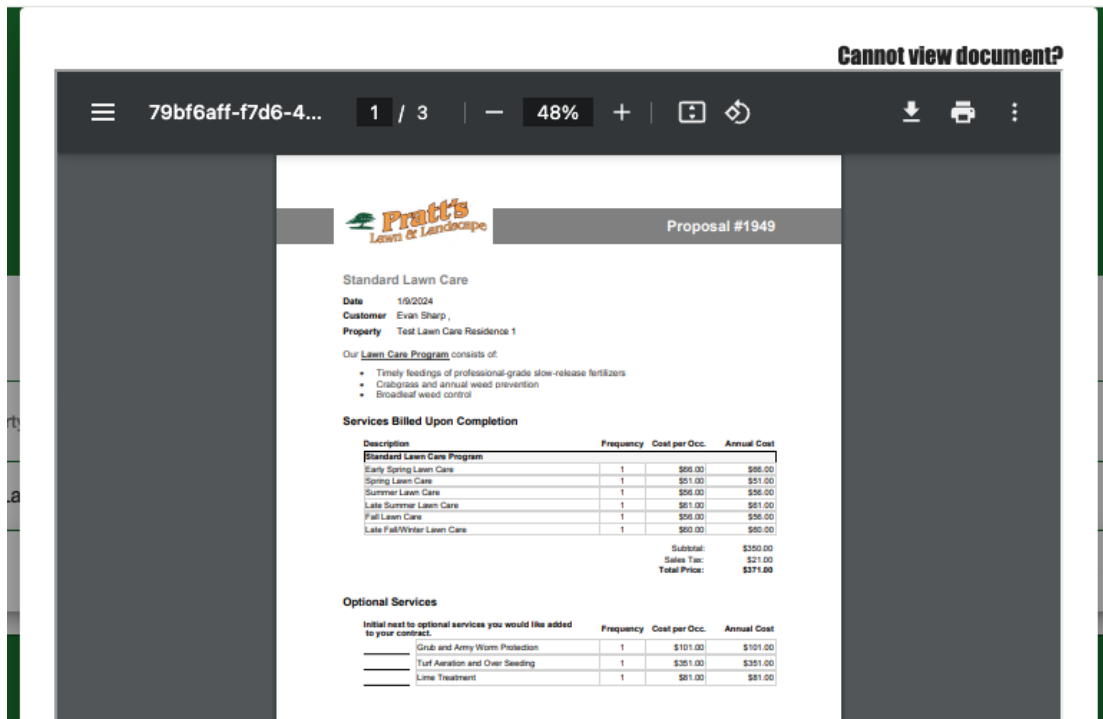
If you **receive** a *Proposal* for work, you can accept and **sign** inside your customer portal account with the use of an *Electronic Signature*!

Viewing a Proposal

When you log in, **click** *Proposals*, and then the vertical three dots to *View* or *Sign*.
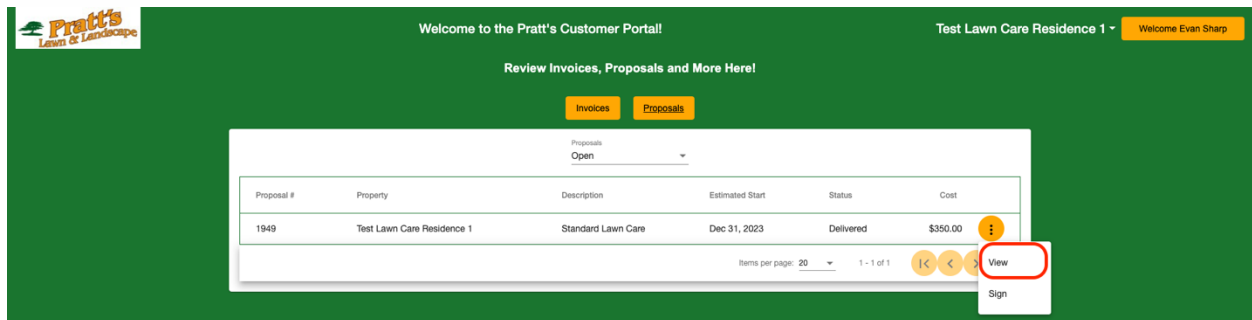

- Viewing will **display** a preview of the opportunity proposal to download and save or print.
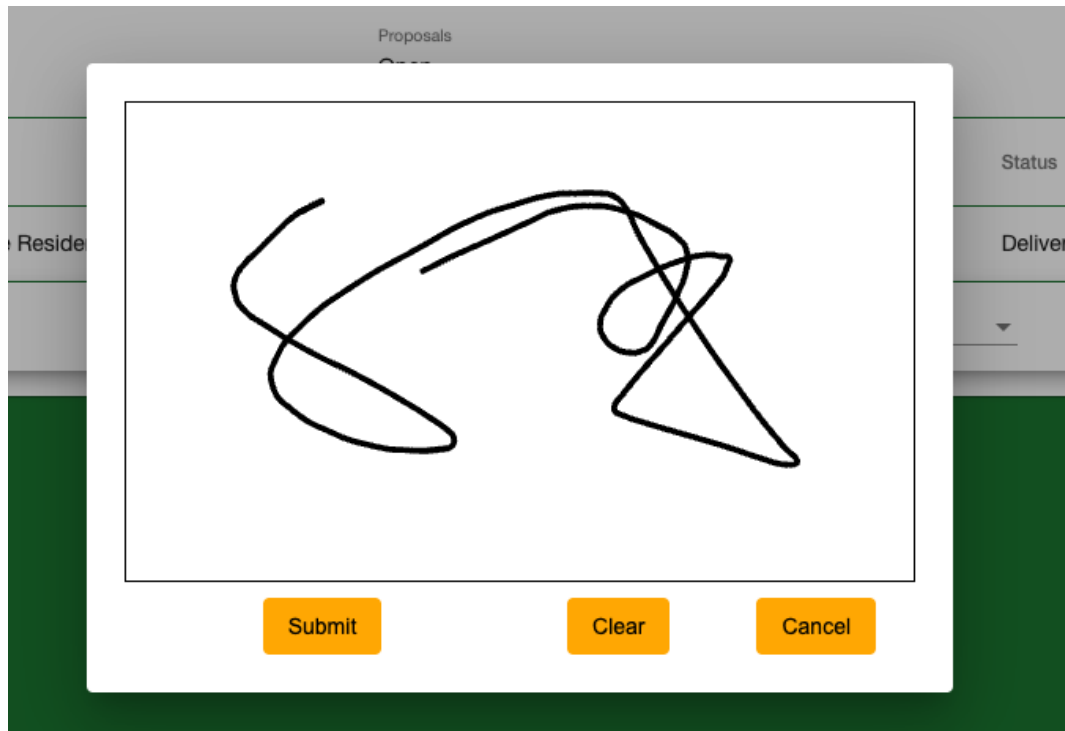
Signing a Proposal

If you want to **sign** the proposal, go back to the three dots, and **select** *Sign*.

- The *Electronic Signature* window will **appear**.

- When the proposal is **signed** via *email*, your Sales Representative will receive an email notifying them the proposal was signed.

📌**Note:** The company you are working with can also **send** proposals via email which you can review and sign.

💡 For the best experience when using the customer portal, it is recommended that the customer portal is **operated** on devices no smaller than a tablet.
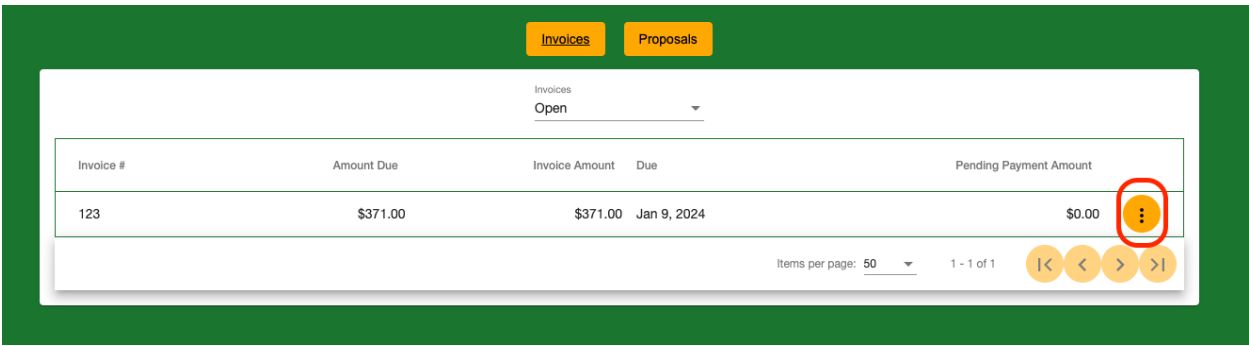
Viewing and Paying Invoices

📌 **Note:** If you do not see *Invoices* **displayed** in the customer portal, you can **skip this section**.

Viewing Invoices

When invoices are sent, you can view them inside of the portal if you are the billing contact. You could also make payments if the company managing the customer portal has electronic payments **enabled**!

- If you need to **review** line-item details inside of your invoices, click *Invoices,* then click the vertical three dot icon, then, select *View*.

- **Viewing** an invoice inside of the *Customer Portal* shows a copy of the invoice sent to you. You would be able to download and print the invoice on this screen.

Here is an example:

Visibility for **reviewing** *Invoices* in the *Customer Portal* is limited to those that have **accepted** the invite and are **listed** as *either* the *Primary* or the *Billing* contact **tied** to the property.

Paying Invoices

📌 **Note**: If you do not see *Pay* **displayed** in the customer portal, you can **skip this section**.

- After the invoice is viewed, then payment can be made with an *Electronic Payment Source*.
- You could then go back to the three-dot menu and **select** *Pay* to **complete** payment.
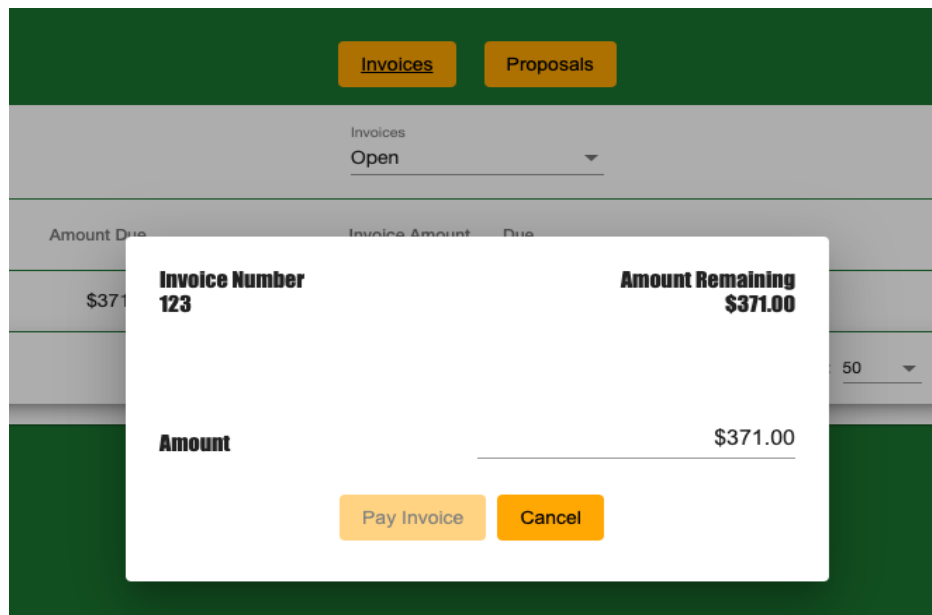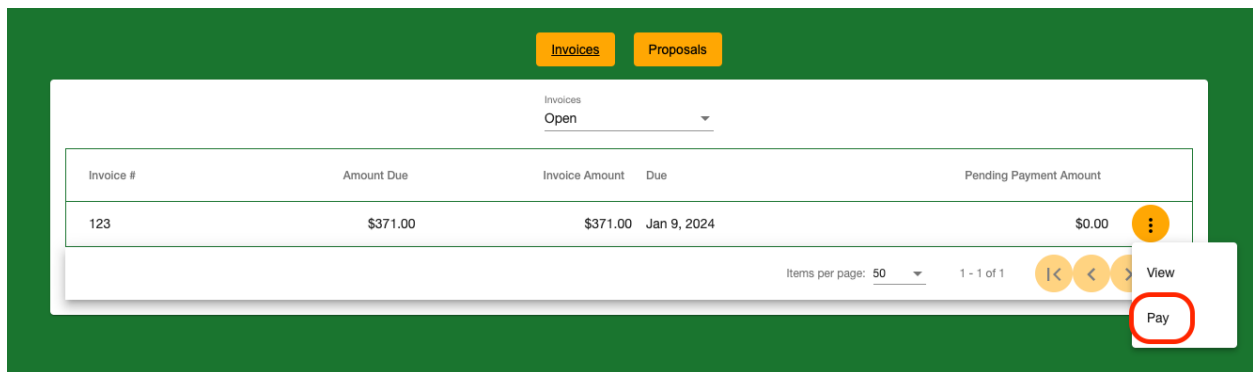
Important to know about *Invoices* in the Customer Portal:

🧠 The due date **displayed** in the *Customer Portal* is tied to the net terms of the properties' invoices.

Multi-Property Management in the Customer Portal

In order for these properties to be **visible** inside of the customer portal for property management companies, you would want to list them as the primary or billing contact.

- The additional properties can be found by **clicking** on the drop-down arrow on the *Property* name display.
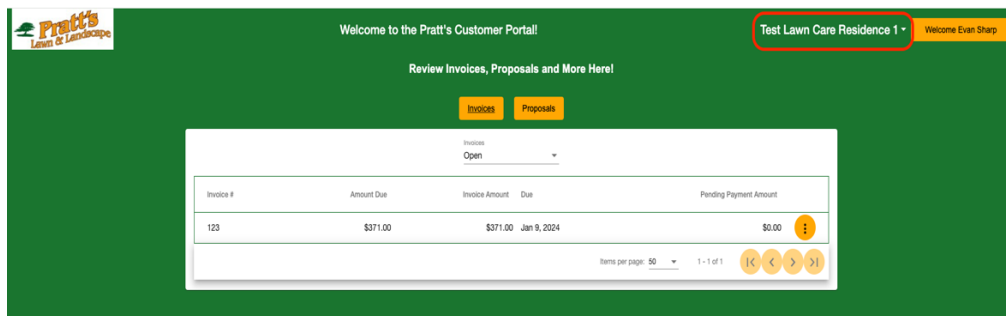
- Then, the additional properties could be **selected** from the drop-down list to view the additional property's *Opportunities, Proposals*.