This Help Documentation are for the users who want to use Compliance Integrated Australia Client Portal.

Introduction

The **Compliance Integrated Australia (CIA) Client Portal** is a ServiceM8 add-on designed to give clients an easy and transparent way to view all relevant compliance and job information in one place. The portal can be accessed securely through our website and provides dashboards, property information, job statuses, and invoices.
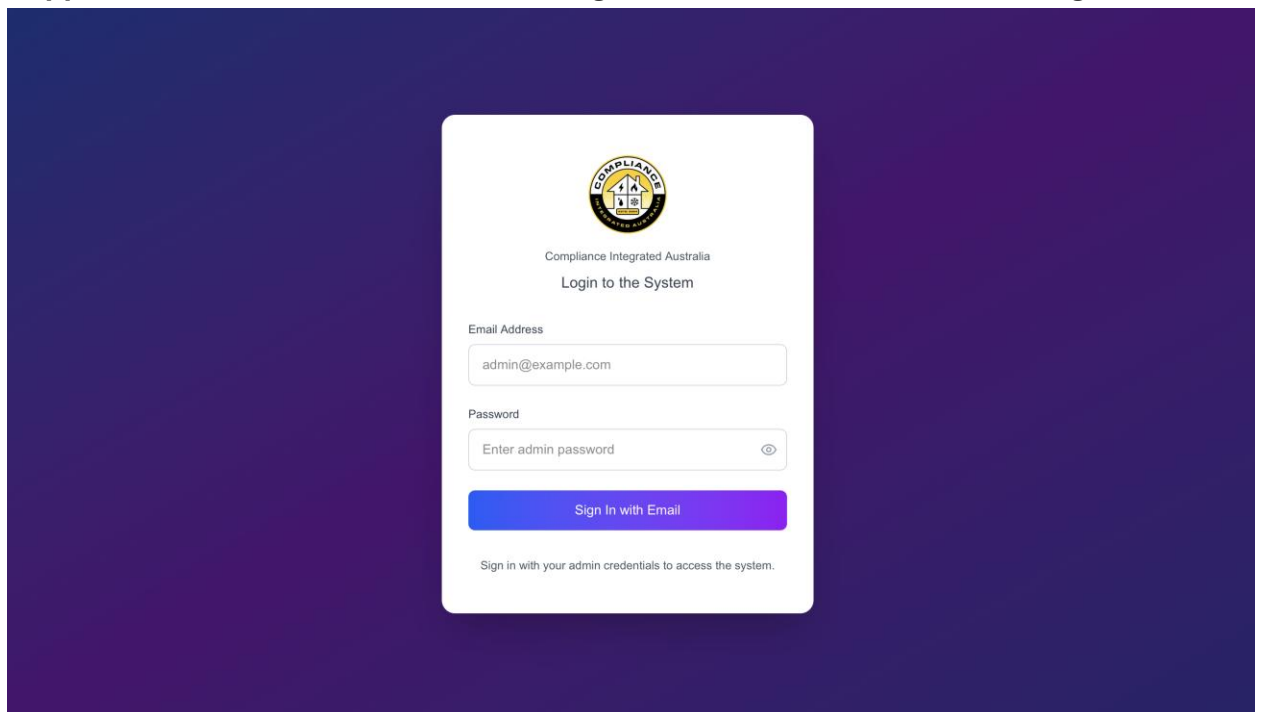
This documentation explains how to access and use the client portal effectively.

Accessing the Client Portal

1. Go to our website: www.complianceintegratedaustralia.com.au
2. Click on **Client Portal Login**.
3. Enter your login credentials (provided by Compliance Integrated Australia).
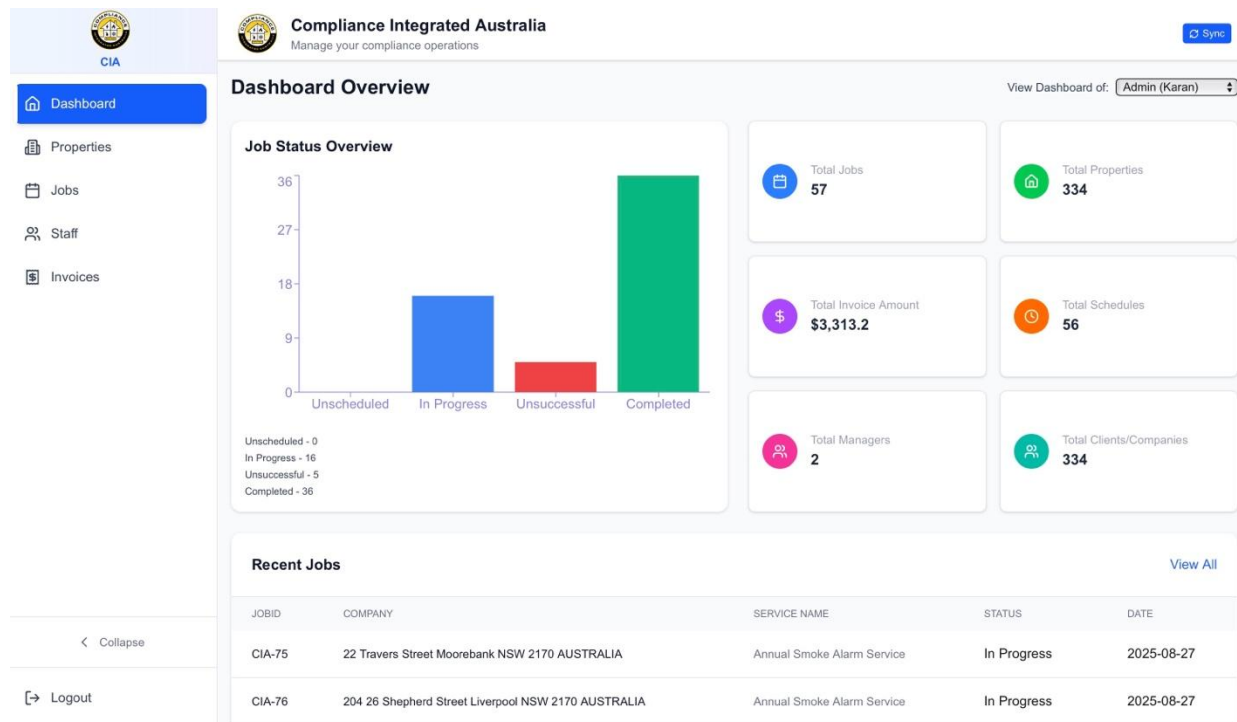4. Once logged in, you will be directed to the **Dashboard Overview**.

   Getting Started (Onboarding)
- **Credentials**: Clients will receive login credentials from CIA's support team.
- **Supported Browsers**: Best viewed on Google Chrome, Safari, or Microsoft Edge.

Screenshot Example:

Dashboard Overview

This page provides a high-level overview of all job and compliance activities.

Dashboard Features

The **Dashboard** is your starting point. It provides: - **Job Status Overview** – See jobs categorized as *Unscheduled, In Progress, Unsuccessful, or Completed*. - **Total Jobs** – The number of jobs linked to your account. - **Total Invoice Amount** – Combined value of invoices. - **Recent Jobs** – A list of the most recent jobs created or completed.

Screenshot Example:
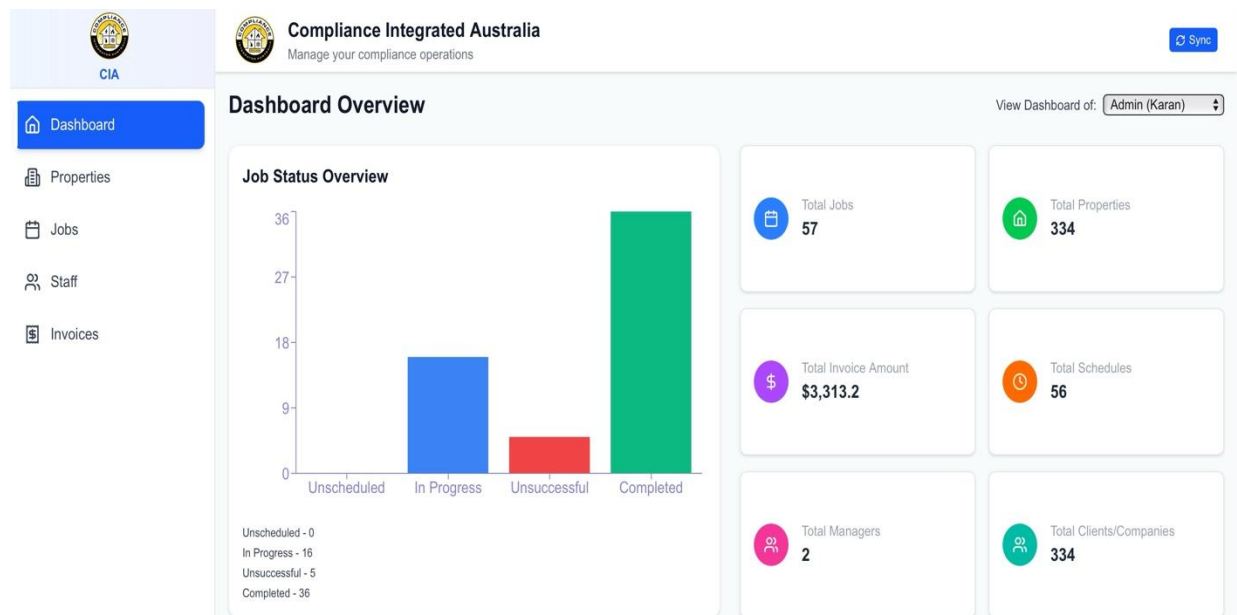
Dashboard Overview Graph

Dashboard Overview Graph

The visual bar graph helps clients quickly identify the progress of jobs across categories.

Managing Properties

The **Properties** tab lists all properties linked to your account. - Each property displays: - Company name - Address - Status (Active/Inactive) - You can click **Open Site** to view full property details.

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Screenshot Example:

Properties Page

Properties Page

This section ensures clients can easily track which properties are active and updated in real-time.

Viewing Jobs

The **Jobs** tab allows clients to track specific compliance tasks. - Each job includes: - **Job ID** - **Company/Address** - **Service Name** (e.g., Annual Smoke Alarm Service) - **Status** (In Progress, Completed, Not Completed) - **Completion Date** - Clients can click **View Details** for a full job description.

 Each job includes:

- **Job ID**

- **Company/Address**

- **Service Name** (e.g., Annual Smoke Alarm Service)

- **Status** (In Progress, Completed, Not Completed)

- **Completion Date**

Clients can click **View Details** for a full job description.

Screenshot Example:

Jobs Page

Jobs Page

This section helps ensure clients stay updated on scheduled and ongoing services.

Managing Invoices & Support

Invoices

The **Invoices** tab enables clients to: - Track invoices awaiting approval - View paid invoices - Identify unknown status invoices - See **invoice statistics** including total counts and amounts

This section ensures financial transparency and easy payment tracking.

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- Track invoices awaiting approval

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- See **invoice statistics** including total counts and amounts

Screenshot Example:

Invoices Page

Invoices Page

Benefits

- **Transparency**: Full visibility into compliance work.
- **Efficiency**: All information in one place.
- **Real-Time Updates**: Automatic syncing ensures accuracy.
- **Compliance Confidence**: Track jobs, properties, and invoices in real-time.

FAQs

Q1: What if I forgot my password?
A: Use the "Forgot Password" option on the login page to reset your credentials.

Q2: Can multiple users from my company log in?
A: Yes, additional users can be granted access upon request.

Q3: How often is the data updated?
A: The portal syncs in real-time with our systems.

Q4: What should I do if a job is marked as unsuccessful?
A: Contact our support team for follow-up and rescheduling.

Glossary of Terms

- **Unsuccessful**: A job attempted but not completed successfully.

- **Awaiting Approval**: An invoice that requires confirmation before payment.

- **Job ID**: Unique identifier for each compliance job.

- **Compliance Schedule**: Planned timetable for property compliance checks.

Troubleshooting

- **Login Issues**: Ensure correct credentials are entered; reset if needed.

- **Invoice not loading**: Refresh the page or clear browser cache.

- **Job data incorrect**: Contact support with the Job ID for assistance.

Security & Data Protection

- All client data is encrypted and stored securely.

- Portal access requires authenticated login.

- Data is synced automatically to ensure accuracy and compliance integrity.

Support & Escalation

For assistance:

- Email: admin**@complianceintegratedaustralia.com.au**

- Phone: **1800 958 025**

- Escalation: Urgent compliance issues can be prioritized by contacting your assigned compliance manager.

Conclusion

The **Compliance Integrated Australia Client Portal** is designed to simplify compliance management for clients by offering a clear, accessible, and real-time view of jobs, properties, and invoices. This structured documentation provides ServiceM8 reviewers and clients with a comprehensive step-by-step guide.