Gold Support Webinar Series:

Customer Portal

This webinar was created to provide an introduction to the Customer Portal with 20-30 minutes of feature introduction and demonstration followed by a Q&A period.

Session Topics

- Customer Portal Overview
- Portal Setup
- Publishing to the Customer Portal
- Portal for your customers
- Outcomes

Notes

Customer Portal Overview

- What is the Customer Portal?

    - A central repository of published project documents

- Why use the Customer Portal?

    - Share proposals, contracts, drawings and other reports with customers or other project stakeholders

- What else can I do with the Customer Portal?

    - Allows for commenting on shared documents

    - Allows for accepting or rejecting documents

    - Includes eSignature capabilities in standard SI 2017 reports

- What file formats does the Customer Portal accept?

    - PDF is the only format that is certain to be viewable in the browser

    - Published reports will be converted to PDF format

Notes

Portal Setup

- D-Tools Customer Portal setup is quick
- Setup data is found in the Company Information section of the Control Panel
- On the Customer Portal tab, you must enter an Alias
- The Alias is used to generate a unique URL for your company

Notes

ACTIVITY 1

Setup the Customer Portal

1. Starting from the main SI application, click Setup → Control Panel from the bottom navigation section.

2. In the Control Panel double-click the Company Information icon to open the Company Information window.

3. Click on the Customer Portal tab to view the portal setup page.

4. To the right of the Alias click Edit. Type an alias that represents your company name (maybe just initials).

5. In the Slogan section, type a slogan if you would like. This will appear in the Customer Portal.

6. Finally, click Save and Close. Your portal URL will be generated and made ready for use.

Note: Use of the Customer Portal is controlled by an SI user group permission. The permission is listed under Projects and labeled 'Share Documents on Customer Portal'.

Notes

Publishing to the Customer Portal

- Users can publish to the portal in two ways:
    - From the Project Explorer
    - From the Project Editor
- Publishing is simple:
    - Select the Customer Portal tab
    - Click Share Documents
    - Add Reports and/or other documents
    - Select Recipients
    - Publish
- The customer will automatically receive a notification

Notes

ACTIVITY 2

Publish a proposal report to the Customer Portal

1. Starting from the Project Explorer, select a project from your list and click the Customer Portal tab.

2. The Customer Portal sharing widow opens. Click Add Reports.

3. Now choose a report, multiple reports or a report group. Click Add and Close (you can also click the Preview button to see the reports before publishing).

4. Click on the Recipients and Users tab. This section includes recipients like your customer and Users to Notify like you or someone in your company.

   a. Verify the correct customer name and email are listed in the recipients section.

   b. Your D-Tools user information should be listed in Users to Notify. Add other users as necessary.

5. Click Share to publish the documents.

6. Once the documents are published, click the View button to open the portal and view shared files.

   Note: *The first time either a recipient or a User to Notify is notified about shared documents they will receive an email with login credentials for the Customer Portal.*

Notes

Portal for your customers

- The first time you share a document with a specific customer they will receive an invitation to login to the Customer Portal

- The invitation includes:

  - Your company logo

  - Information identifying the project

  - Login credentials

  - Information about the shared documents

- Once the customer opens the portal and completes the login:

  - They can view shared documents

  - Comment on shared documents

  - Accept or Reject shared documents

  - eSign shared project reports

- To understand the experience of your customers, use a test project and a personal or temporary email account to share documents

Notes

Outcomes

- How does the Customer Portal impact my processes?
  - The Customer Portal can help streamline your process for communicating project information to customers
  - The portal allows you track proposals your customers have viewed
  - The portal allows you track proposals your customers have signed
  - This translates into tracking your contract values
- How about tracking design data?
  - The portal enables you to share drawing data and receive approval from various stakeholders including:
    - Owner
    - Architect
    - Builder
    - Subcontractors
- BEWARE: Any shared document for a project becomes available to all recipients!

Notes

ACTIVITY 3

Typical Steps for the suggested workflow

1. Create a customer and project in your normal fashion.

2. Review scope, equipment, services and pricing information to confirm accuracy.

3. Issue proposal information to stakeholders via the Customer Portal (see Activity 2).

4. Browse to the project in the Project Explorer. Check out the project.

5. Now click on the Information button in the toolbar. Update the Project Progress to a value such as 'Pending.' Click Save and Close.

6. After a customer accepts your proposal and you receive the signed PDF copy in email:

    a. If the current version of the Project is to be Approved, simply click the Mark Project as Approved button on the Home tab. Otherwise, use the Promote as Project feature before marking the project as approved.

    b. The Mark Project as Approved dialog box opens.

        i. SI sets the Project Status to the first Status with a State of Won. You can manually change this if necessary.

        ii. SI automatically creates a Revision of the Project with the note 'Approved project revision.' You can manually change the notes if necessary.

        iii. Click Mark as Approved.

    c. A check mark will now be visible in the Approved column within the Project Explorer view.

Note: You may want to download and save a copy of the signed proposal in the project files.

7. Now your project State (revision) has been saved and the Progress is accurately reflected.

Notes

Training content complete

- Questions?

- Support Resources Available

    - D-Tools Application Home Page Links

        - [Documentation](#) – open the Support Wiki

        - [Support Ticket](#) – open the web page to create a support ticket

        - [Chat With Us](#) – Launches Chat Support

    - From any D-Tools software interface, click Learn More

        - Found in the upper-right corner

        - Launches the Support Wiki

    - Open the Support Wiki directly at support.d-tools.com

    - Send an email to support@d-toolshelp.com

    - Call 866.386.6571

Notes