PREMIER LANDSCAPE Management

A Division of Florida Landscape Management Companies, Inc.

Client Portal Access Instructions and Overview

Using the Customer Portal

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Purpose

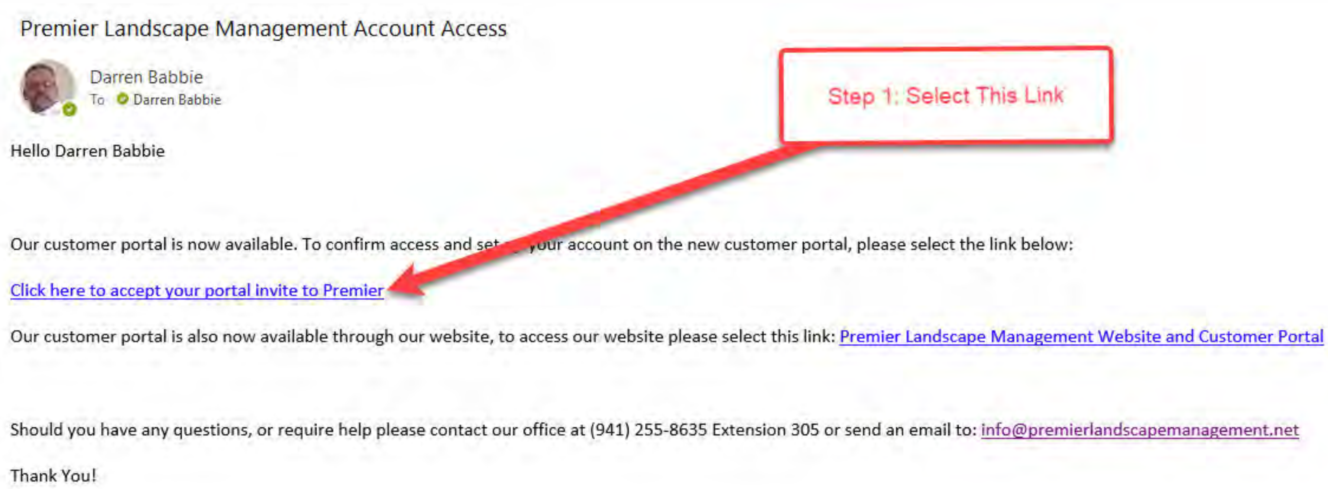
Read this helpful step-by-step to explain the features in our portal to help you understand what is available within the portal. Please note that you can have multiple properties using the same email address and password. This would be relevant if you own multiple properties, or as in this case, the HOA is responsible for various maintenance services on your property, and you have a personal account for services that you are responsible for, such as replacing shrubs, bushes, landscape improvements, or others.

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 will have to **request** a new *Portal Invitation Email* from our office.

Example of Customer Portal Invitation email:

Step 1: Select the link as shown below.



Premier Landscape Management Account Access

Darren Babbie
To Darren Babbie

Hello Darren Babbie

Our customer portal is now available. To confirm access and set up your account on the new customer portal, please select the link below:

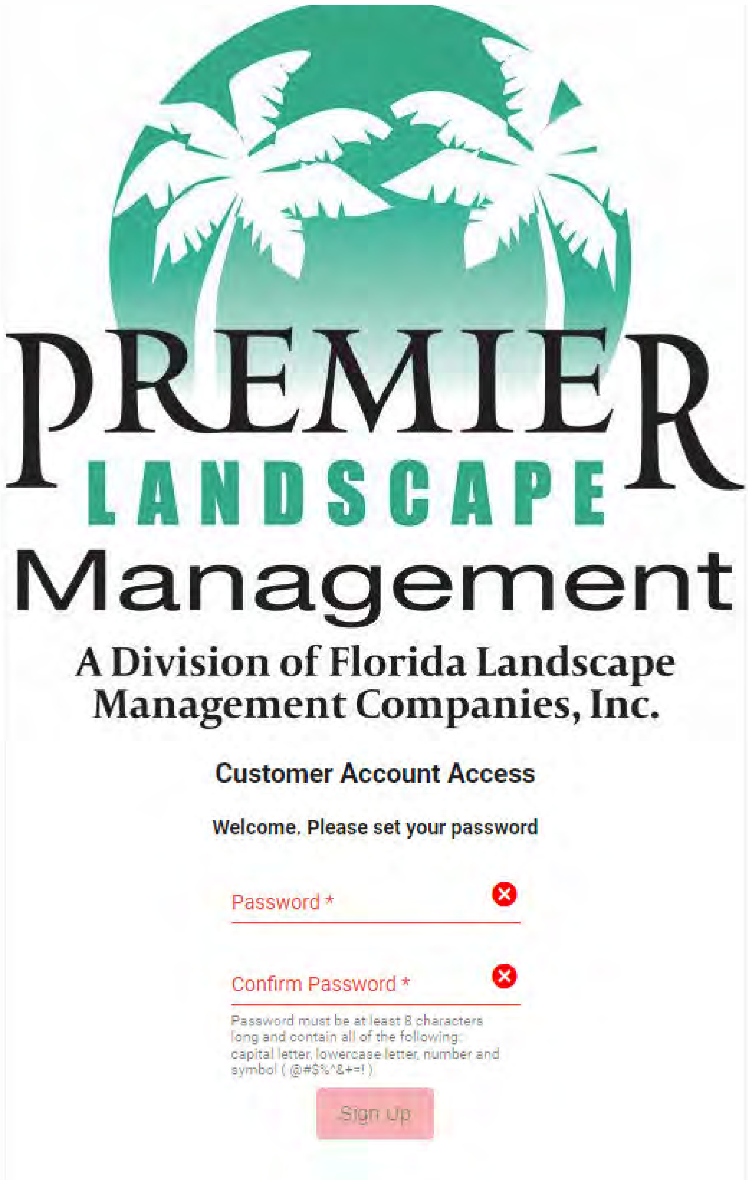
Click here to accept your portal invite to Premier

Our customer portal is also now available through our website, to access our website please select this link: Premier Landscape Management Website and Customer Portal

Should you have any questions, or require help please contact our office at (941) 255-8635 Extension 305 or send an email to: info@premierlandscapemanagement.net

Thank You!

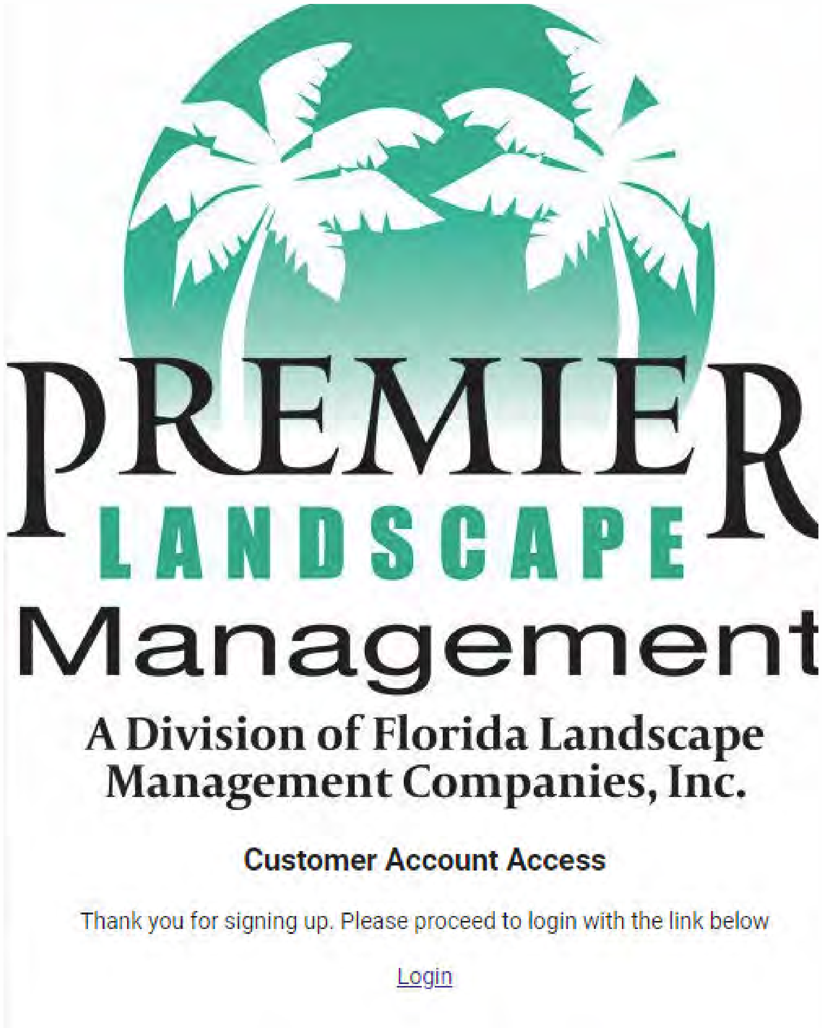
Example of Customer Portal Registration Page:



Step 2: Create a password. The password must be at least 8 characters long and contain all the following: capital letter, lowercase letter, number, and a symbol (@ # $ % ^ & + = !).

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.

Example of the Portal Log-In Page:

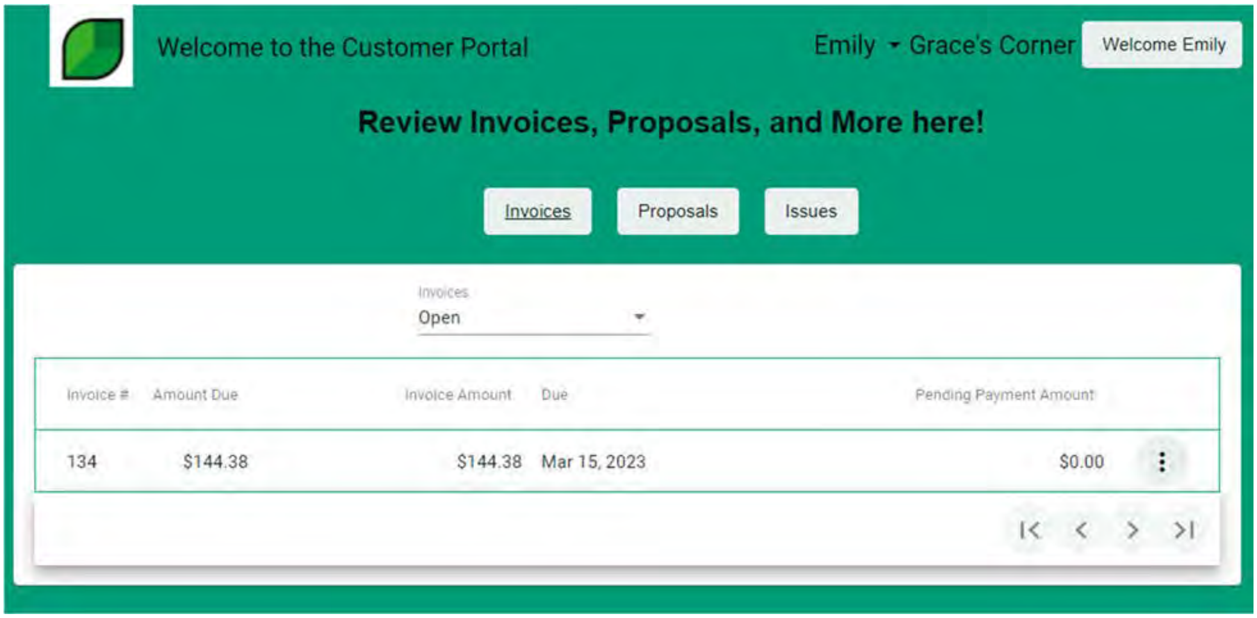


Step 3: Enter your email address and password to log into the portal.

Logging Into the Customer Portal

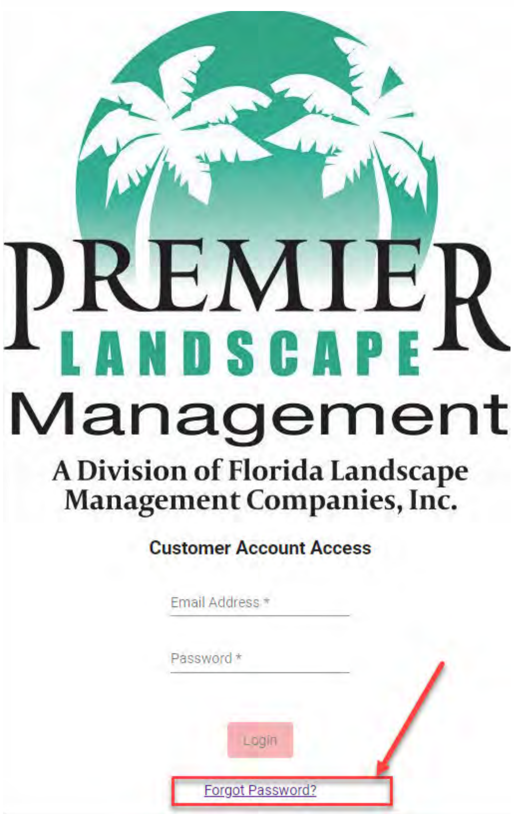
To log into the portal, you will **enter** the email address that the portal was accepted from, complete with the password that you **created** at the time of sign up. Once you are logged in, your dashboard will be displayed.

Example of the Portal Dashboard:



Reset Password

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



Note: We **cannot see** your passwords; it is 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, in order to **receive** the *Password Reset* email.

If you change your email address, please call, or email our office with the new email address and we will update your information.

Troubleshooting

If you **click** the link to reset your password for your account and you do not receive the reset email, **call, or email our office** to see if you are *Customer Portal Verified*. This means that you have **accepted** your invitation 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, call or email our office and we will **resend** you the invite to create a portal account.

Features of Your Customer Portal

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

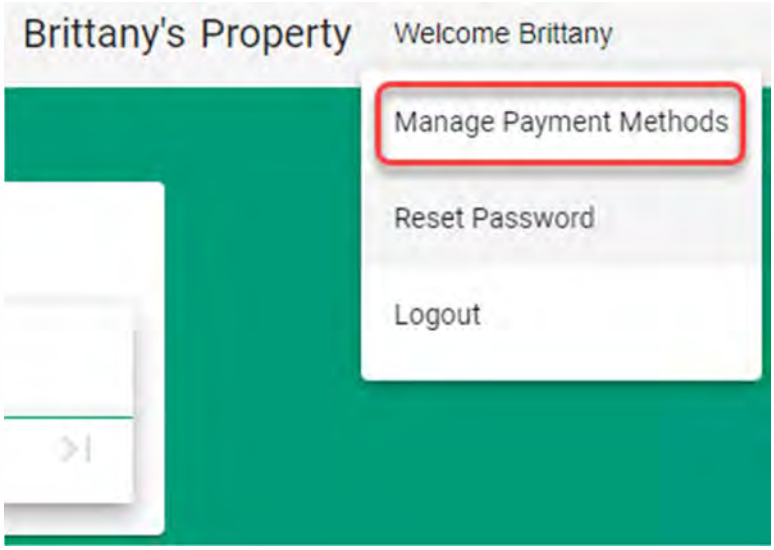
We will go over the self-serve features that the customer portal offers so you can understand what you can do on your own:

- **Manage** payment methods.
- **View** and **sign** *Proposals*
- **View** and **pay** *Invoices.*
- **Review** and **comment** on *Issues*
- **Manage** multiple properties.

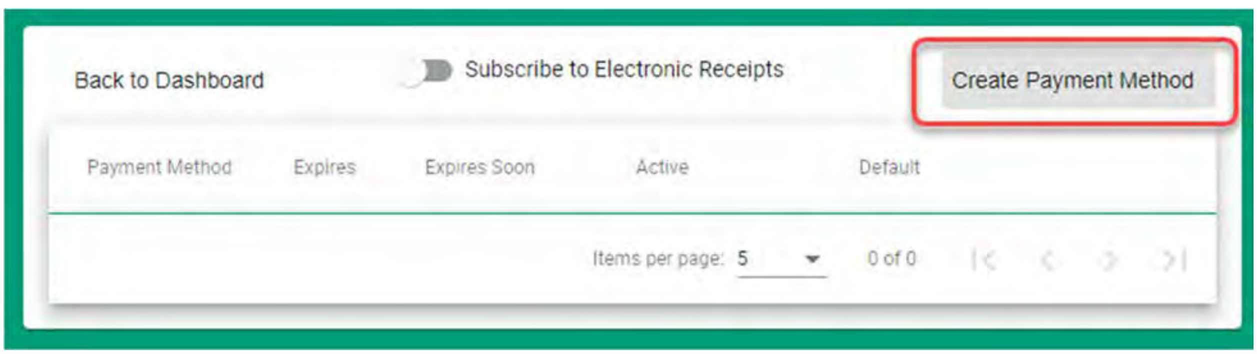
Managing Payment Methods

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*.

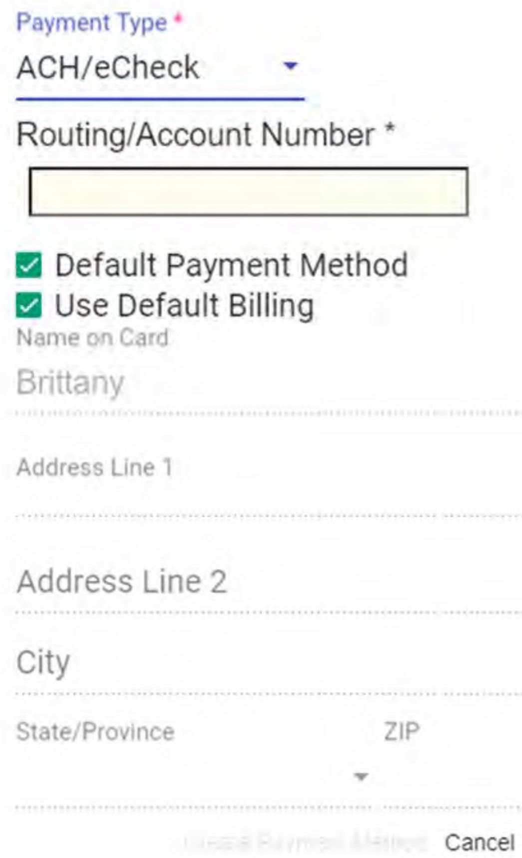


- **Click** *Create Payment Method* to **add** a new payment source.

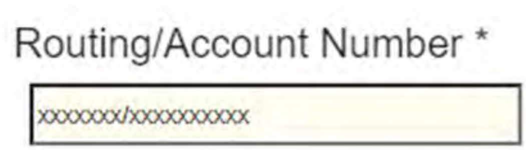


ACH/eCheck

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 "/".



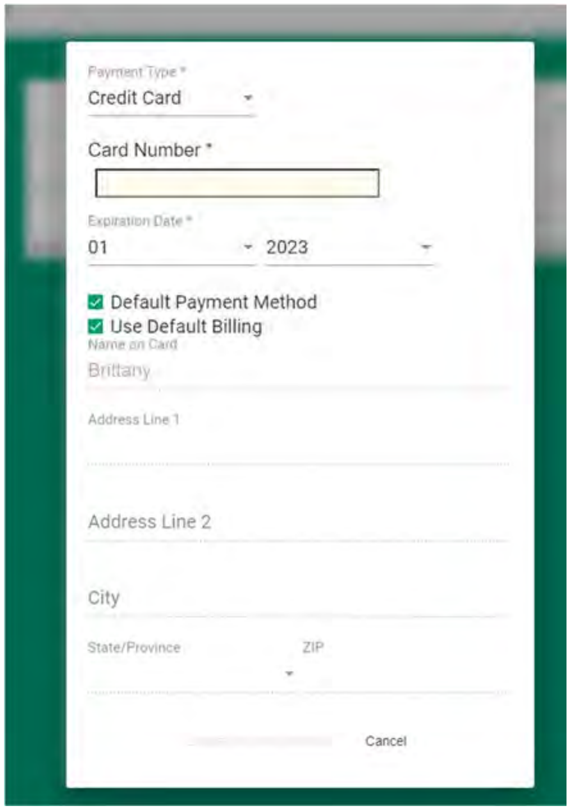
⚠ No spaces or special characters besides "/" should be used in this box.

- 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*.

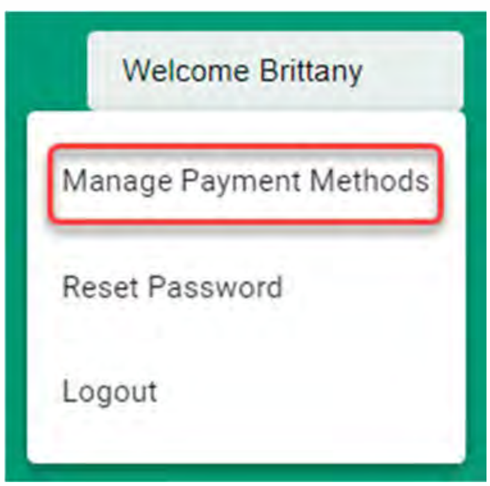
Credit Card

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.

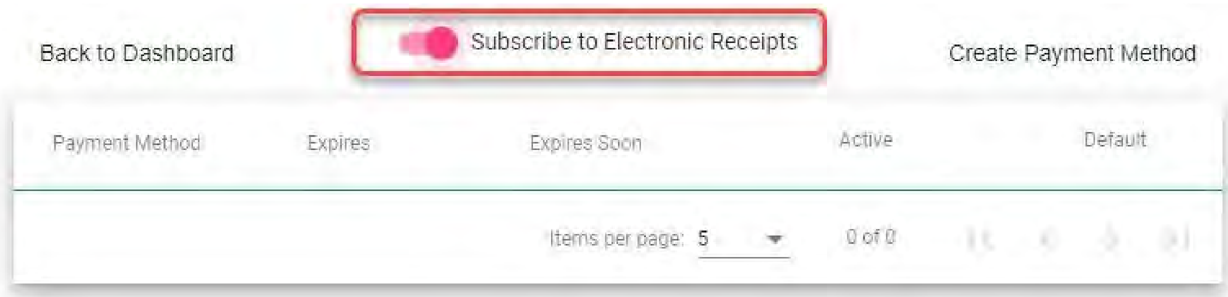


Subscribing to Electronic Receipts in the Customer Portal

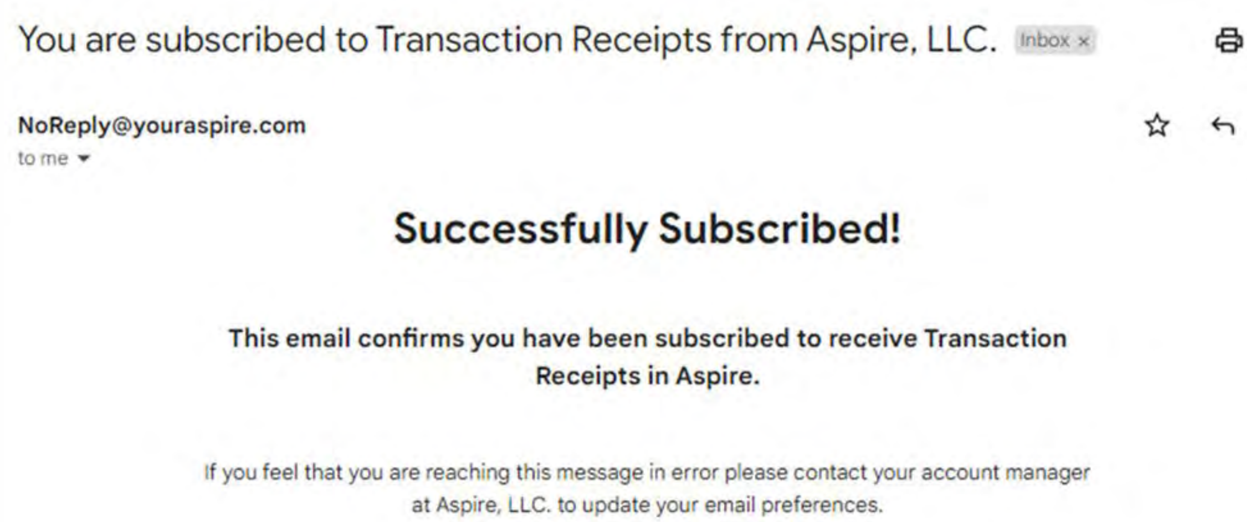
You have the option to **subscribe** to *Electronic Receipts* in the Customer Portal. This option can be turned on from the *Manage Payments* screen under the *Welcome* button.



- If this is turned on, you will get an automatic email **notifying** you that you have opted in to receive *Electronic Receipts* when payments are **completed**.



Here is an example email of what you will **receive** when turning this button on for *Electronic Receipts*:



- Now, when a payment is **made** with the payment source on file, you will automatically get a receipt for the amount paid.

Viewing and Signing Proposals

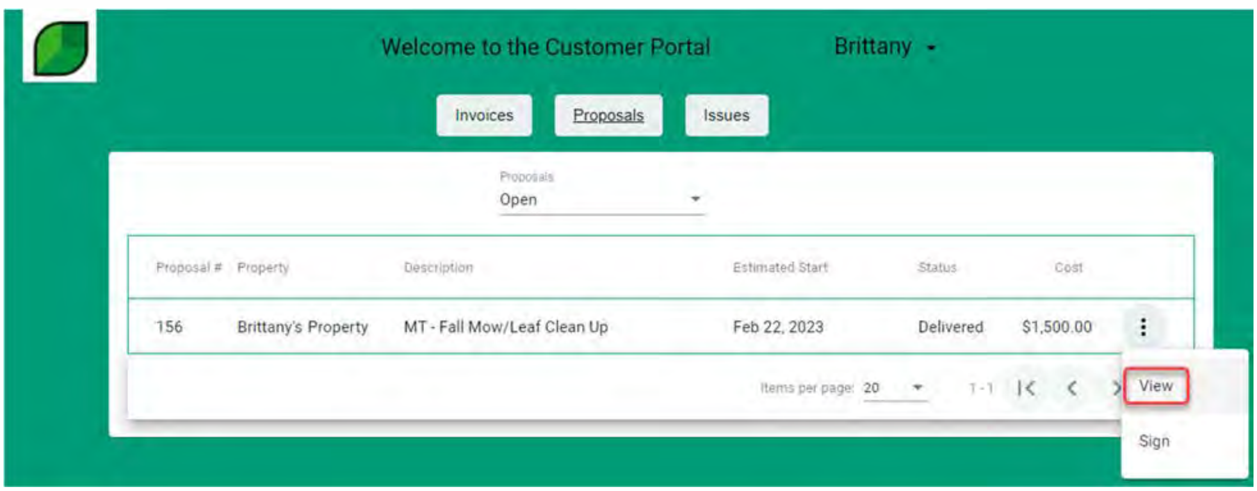
Note: If you do not **see** *Proposals* displayed in the customer portal, **you can skip this section.**

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*.

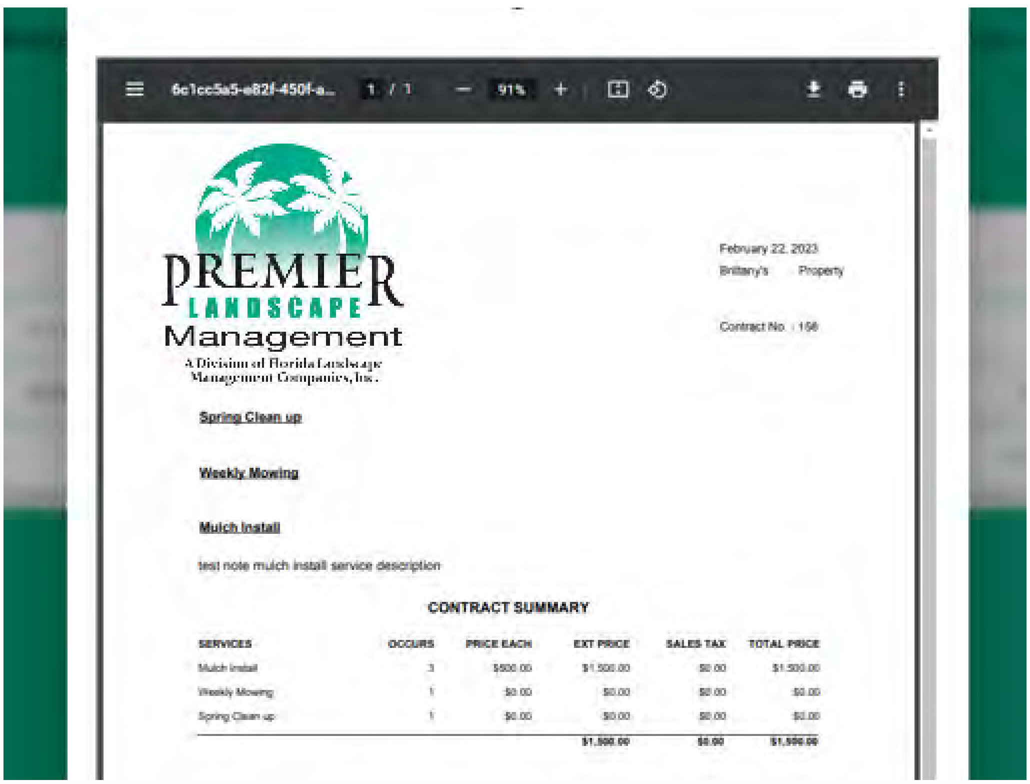
If you **receive** a *Proposal* for work, you can accept and **sign** inside your customer portal account with the use of an *Electronic Signature*!

Viewing a Proposal

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

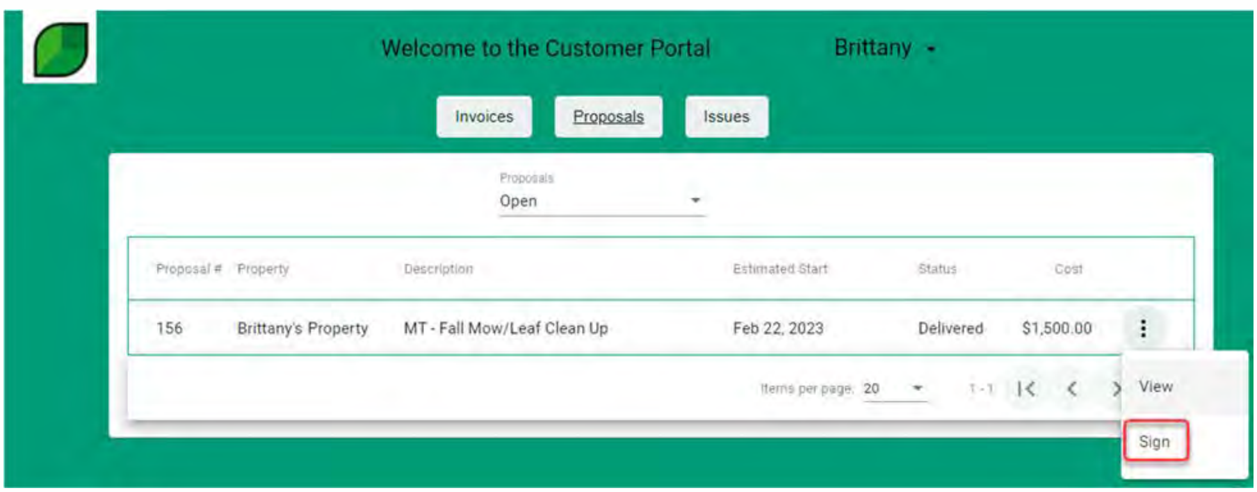


- Viewing will **display** a preview of the opportunity proposal to download and save or print.

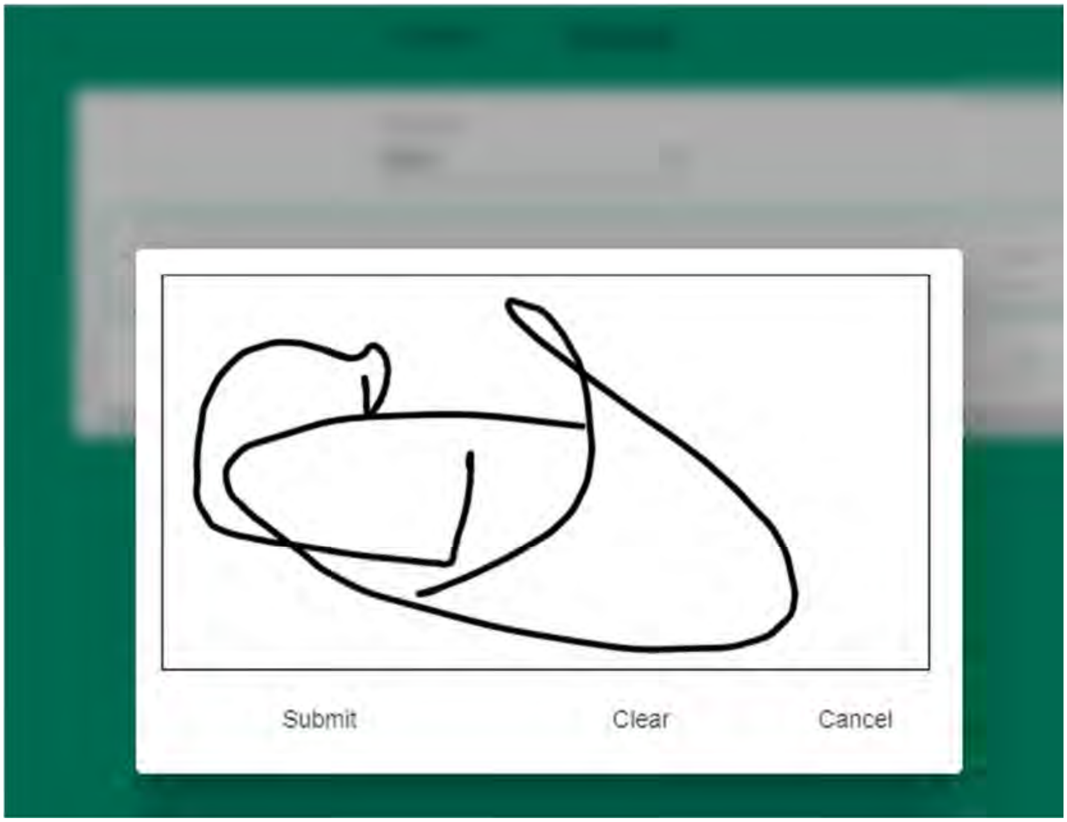


Signing a Proposal

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:** We 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.

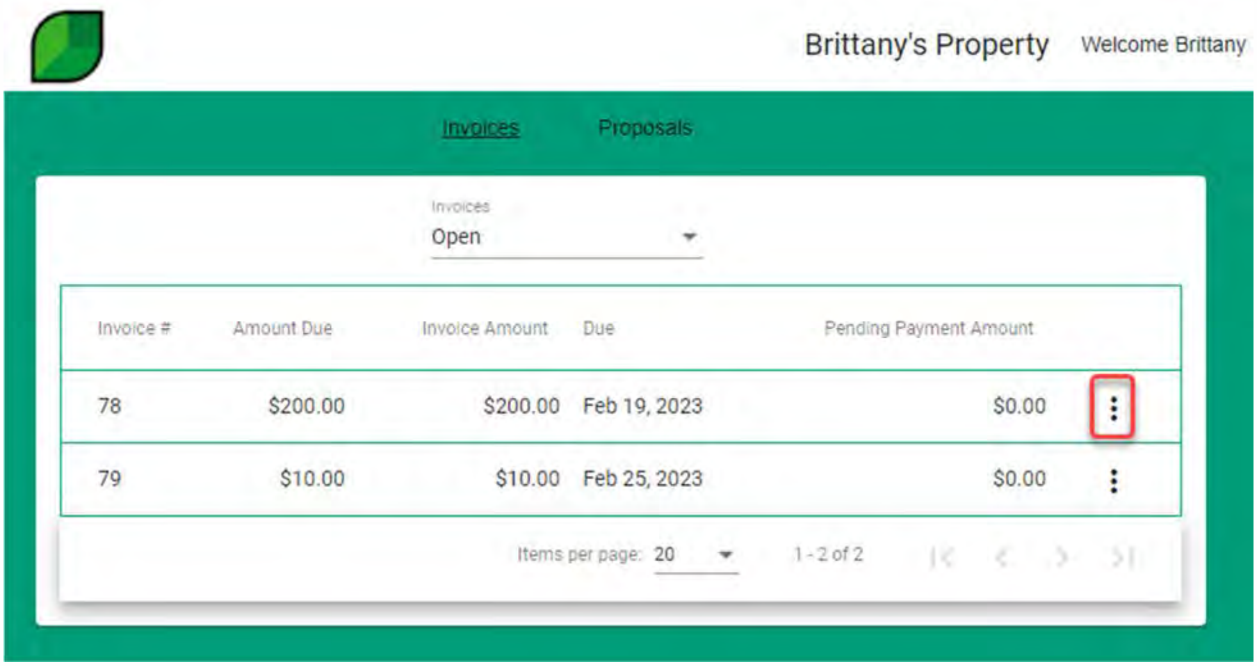
Viewing and Paying Invoices

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

Viewing Invoices

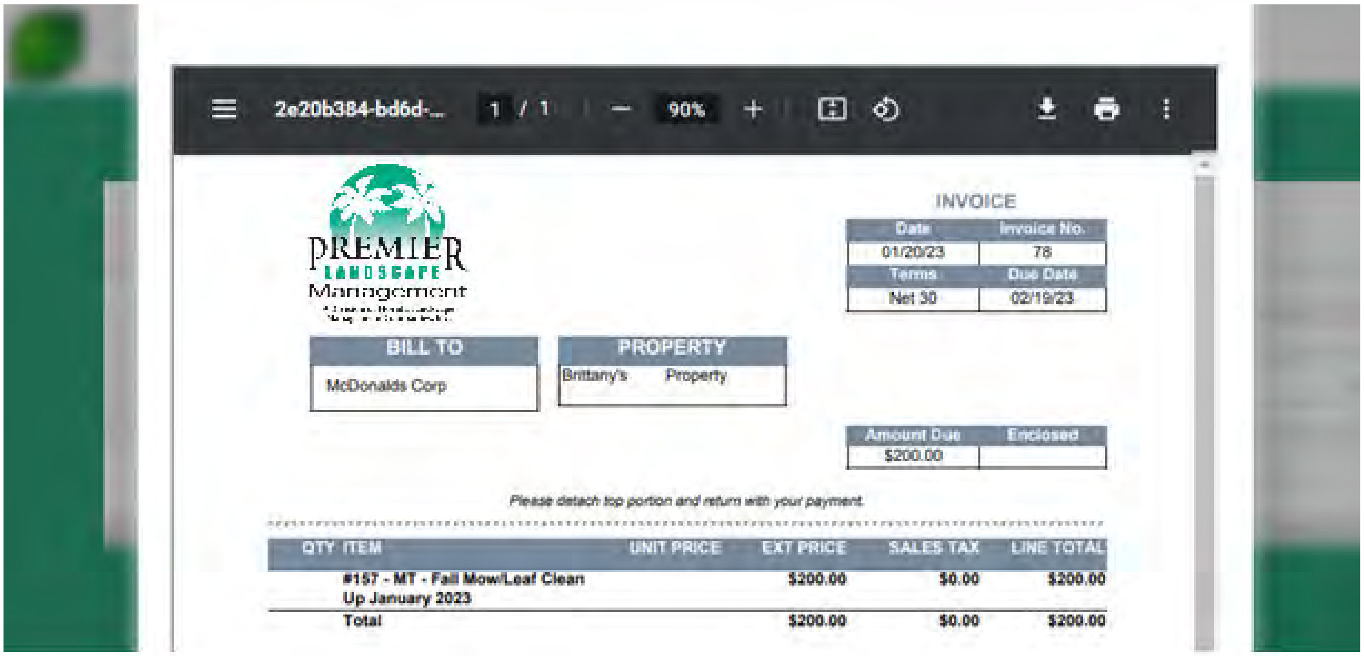
When invoices are sent, you can view them inside of the portal if you are the billing contact. You can also make payments against any open invoices.

- 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:



Date	Invoice No.
01/20/23	78
Terms	**Due Date**
Net 30	02/19/23

BILL TO	PROPERTY
McDonalds Corp	Brittany's Property

Amount Due	Enclosed
$200.00	

Please detach top portion and return with your payment.

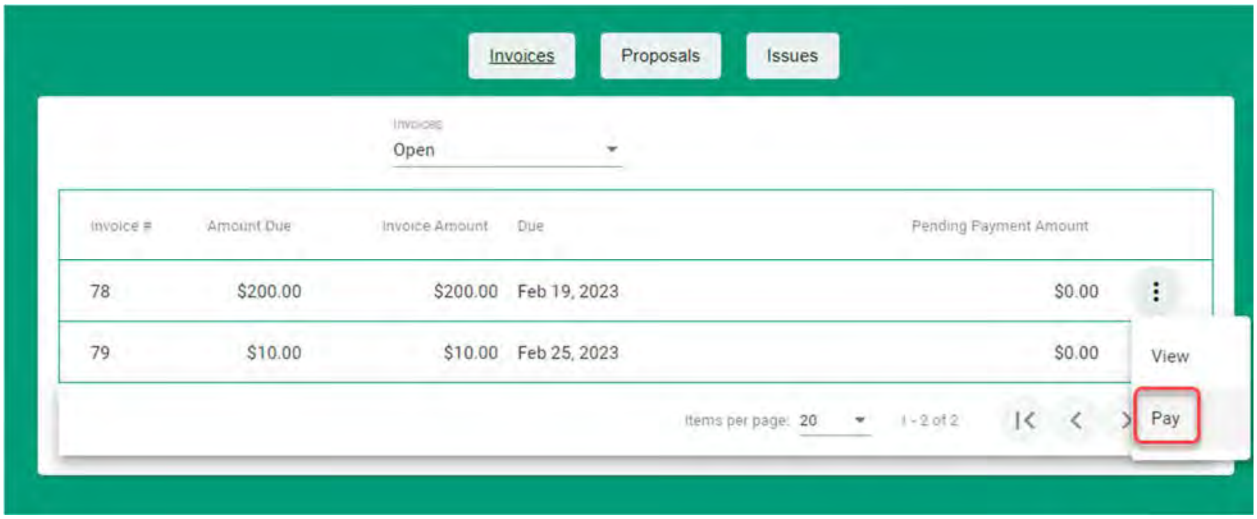
QTY	ITEM	UNIT PRICE	EXT PRICE	SALES TAX	LINE TOTAL
	#157 - MT - Fall Mow/Leaf Clean Up January 2023		$200.00	$0.00	$200.00
	Total		$200.00	$0.00	$200.00

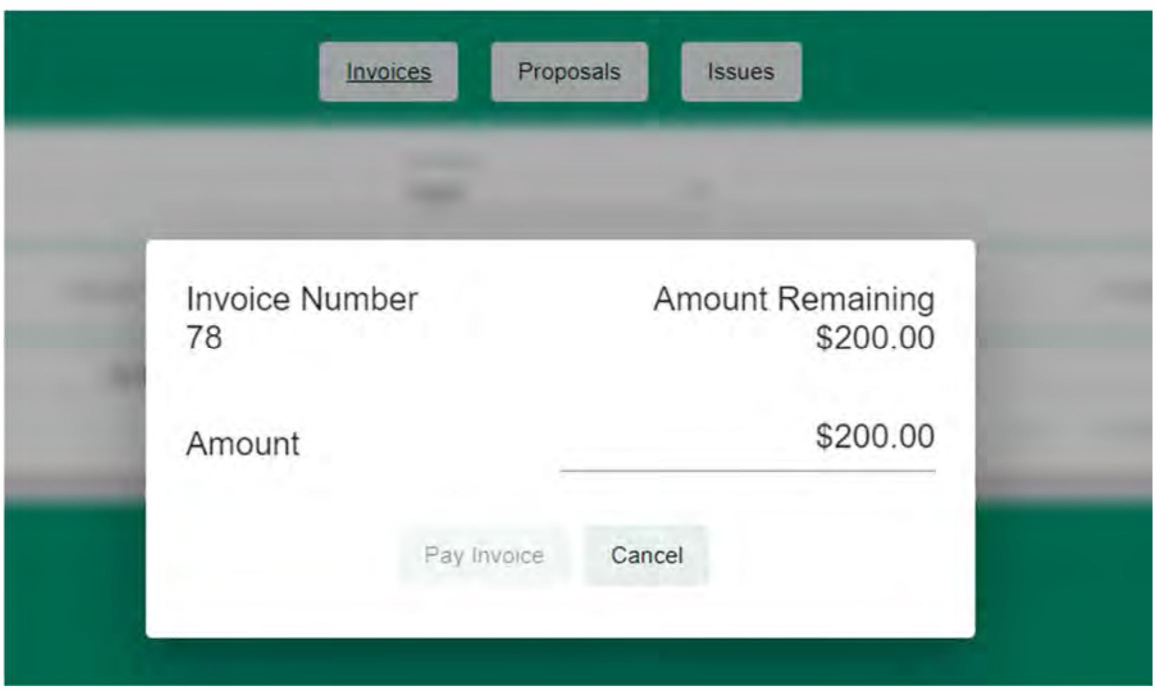
Visibility for **reviewing** *Invoices* in the *Customer Portal* is limited to those that have **accepted** the invite and are **listed** as *either* the *Primary* or the *Billing* contact **tied** to the property.

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.



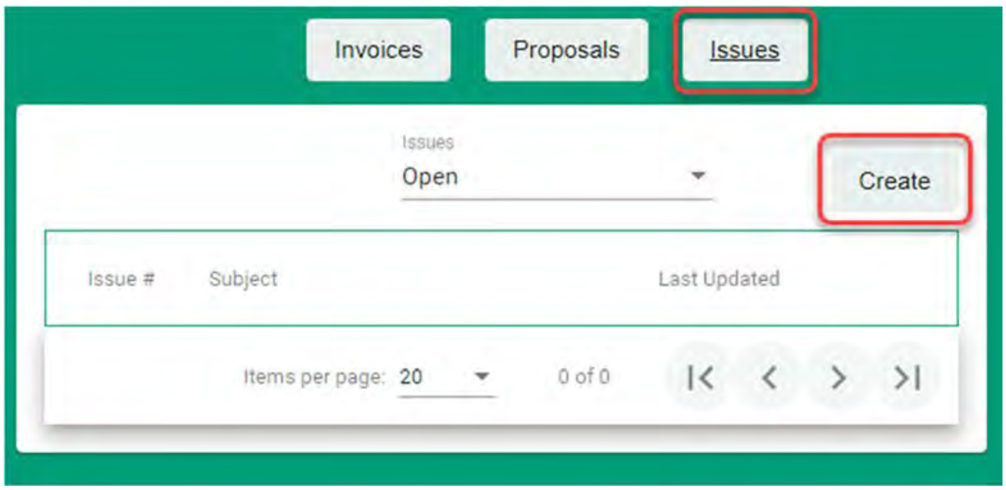


Viewing Issues

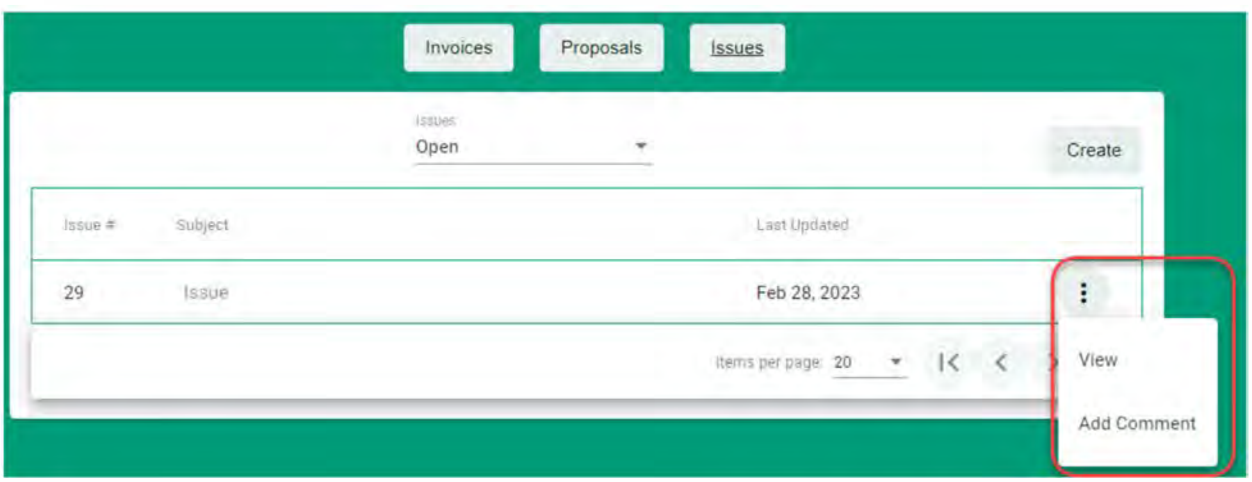
Note: If you do not see *Issues* **displayed** in the customer portal, you can skip this section.

You can **view** *Issues* that are tied to your properties including any comment that is made onto the *Issue* in the customer portal.

- As a customer, you can also create a new issue directly from the portal, by clicking the *Create* button.

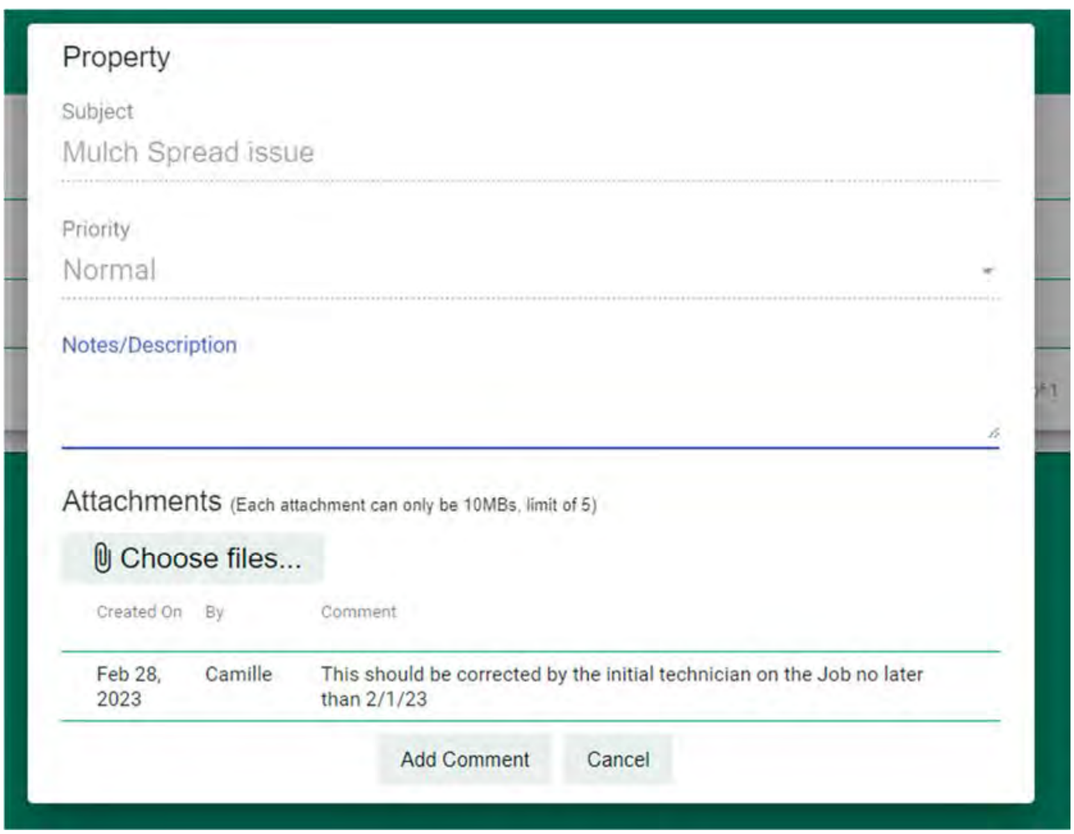


- **Clicking** on the vertical three dot menu allows you to view more details. You can also make comments on the issue.



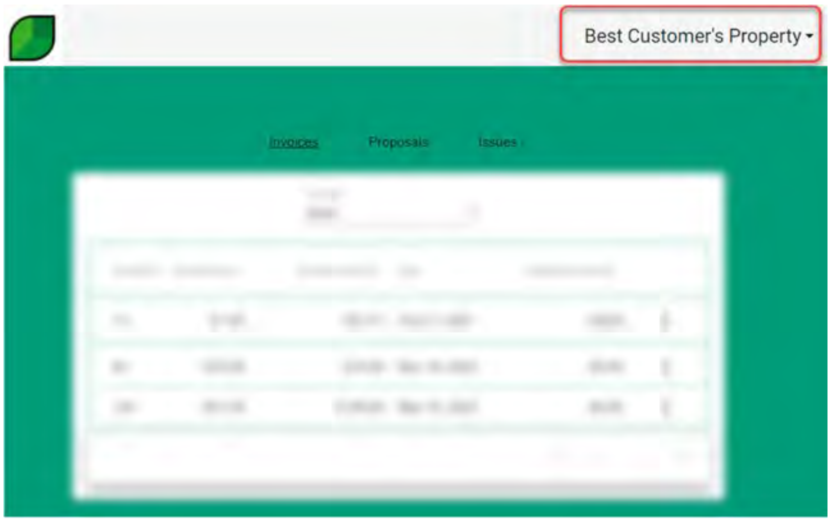
- If a reply or update was made on the issue, it will be **displayed** inside of the portal. The screen below appears when *View* is selected.

- If you want to add your own comment, **click** *Add Comment*, and reply to **update** the issue.



Multi-Property Management in the Customer Portal

- The additional properties can be found by **clicking** on the drop-down arrow on the *Property* name display.



- Then, the additional properties can be **selected** from the drop-down list to view the additional property's *invoices, Proposals,* or *Issues*.