



# Client Portal Access Instructions and Overview

# USING THE CUSTOMER PORTAL

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## Purpose

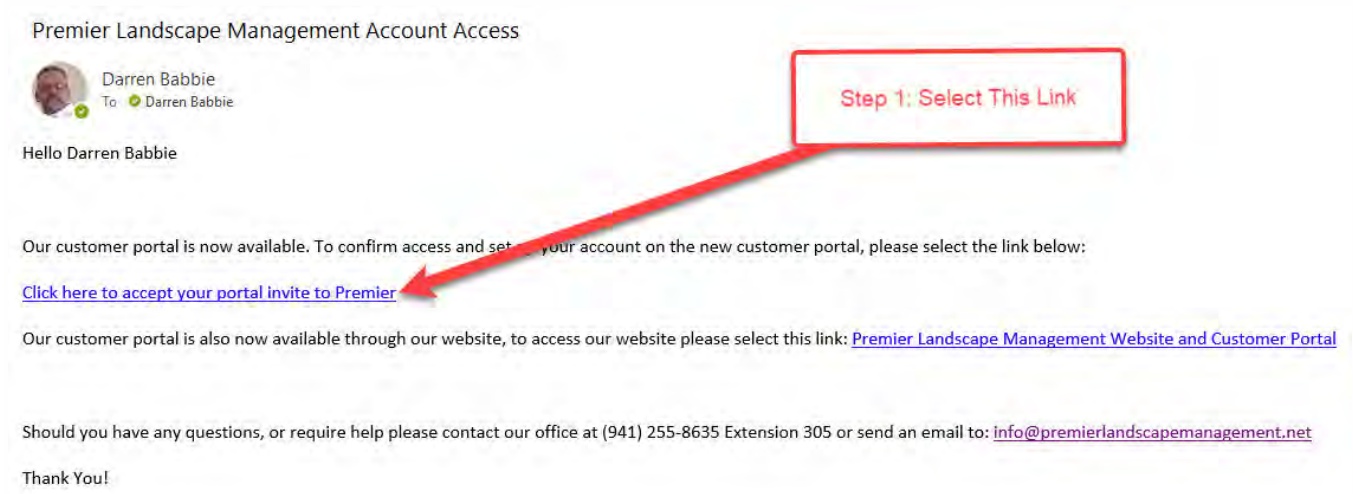
**Read** this helpful step-by-step to explain the features in our portal to help you understand what is available within the portal. Please note that you can have multiple properties using the same email address and password. This would be relevant if you own multiple properties, or as in this case, 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.



## Example of Customer Portal Registration Page:



**PREMIER**  
**LANDSCAPE**  
**Management**

A Division of Florida Landscape Management Companies, Inc.

**Customer Account Access**

Welcome. Please set your password

Password \*

Confirm Password \*

Password must be at least 8 characters long and contain all of the following: capital letter, lowercase letter, number and symbol ( @ # \$ % ^ & + = ! ).

Sign Up

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:



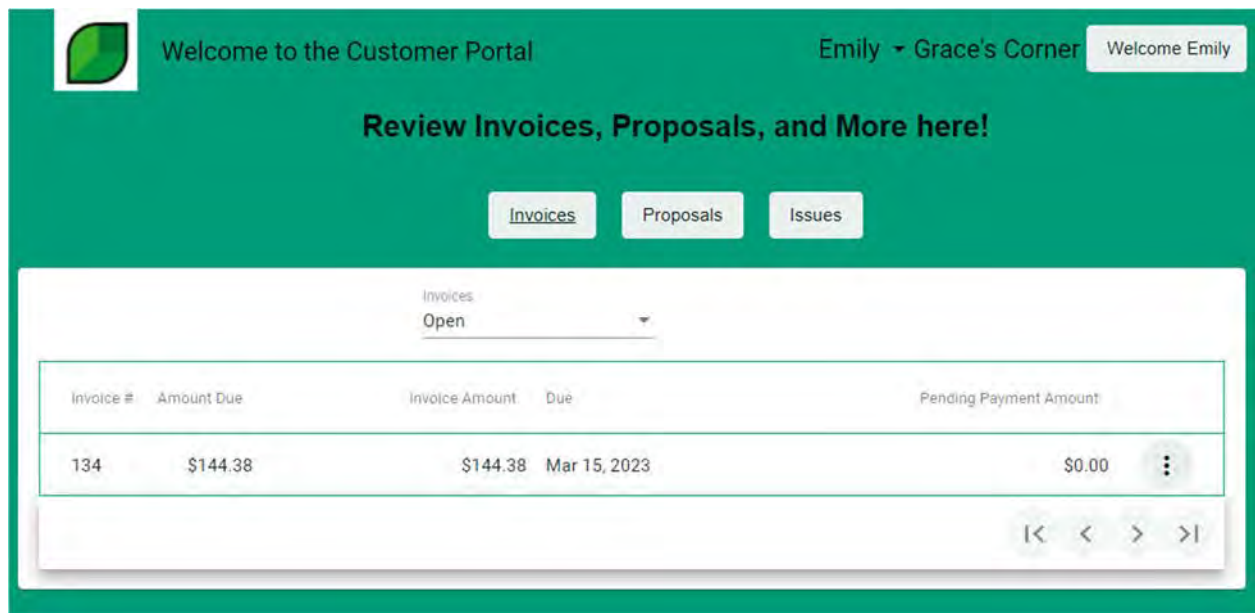
Step 3: Enter your email address and password to log into the portal.

## 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:



The screenshot shows the Customer Portal dashboard. At the top, there's a green header with a logo on the left, "Welcome to the Customer Portal" in the center, and "Emily ▾ Grace's Corner" and "Welcome Emily" on the right. Below the header, a green banner says "Review Invoices, Proposals, and More here!". Underneath, there are three buttons: "Invoices", "Proposals", and "Issues". The "Invoices" button is selected, and a dropdown menu shows "Open". Below this, there's a table with columns: "Invoice #", "Amount Due", "Invoice Amount", "Due", and "Pending Payment Amount". The table has one row with the following data: Invoice # 134, Amount Due \$144.38, Invoice Amount \$144.38, Due Mar 15, 2023, and Pending Payment Amount \$0.00. At the bottom right of the table, there's a three-dot menu icon. Below the table, there are navigation arrows: "<|", "<", ">", and ">|".

## Reset Password

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



**PREMIER  
LANDSCAPE  
Management**  
A Division of Florida Landscape  
Management Companies, Inc.


Customer Account Access

Email Address \*

Password \*

Login

**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.

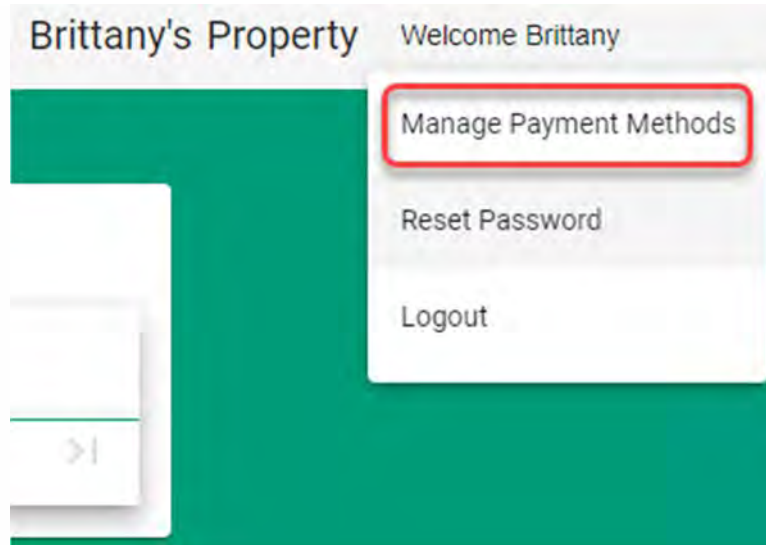
We will go over the self-serve features that the customer portal offers so you can understand what you can do on your own:

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

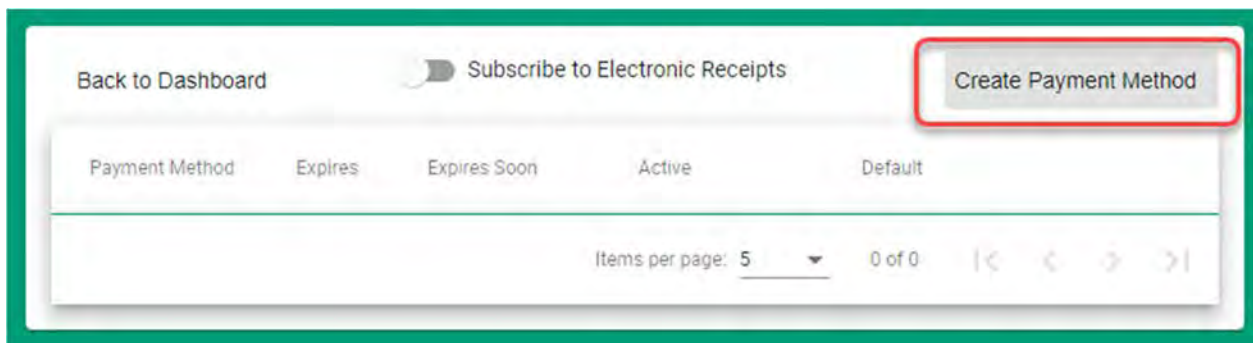
## Managing Payment Methods

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*.



Payment Type \*  
ACH/eCheck ▼

Routing/Account Number \*

☒ Default Payment Method  
☒ Use Default Billing

Name on Card  
Brittany

Address Line 1

Address Line 2

City

State/Province ZIP

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

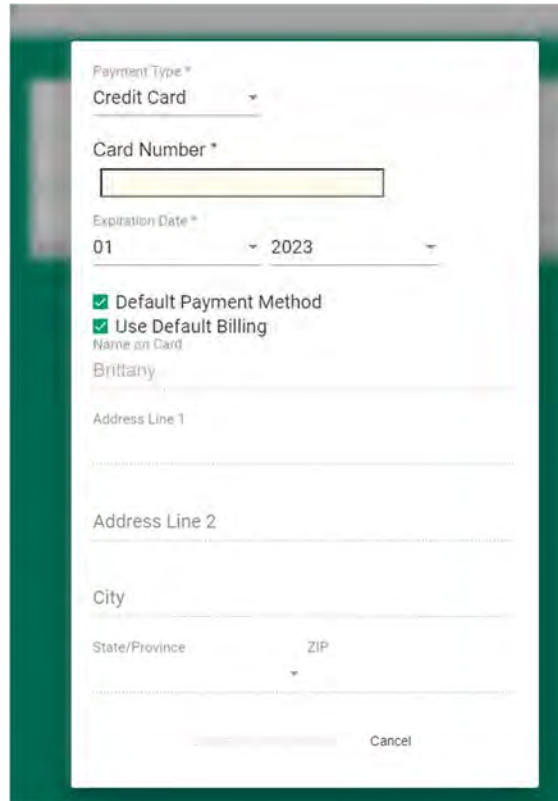
Routing/Account Number \*

⚠ 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.

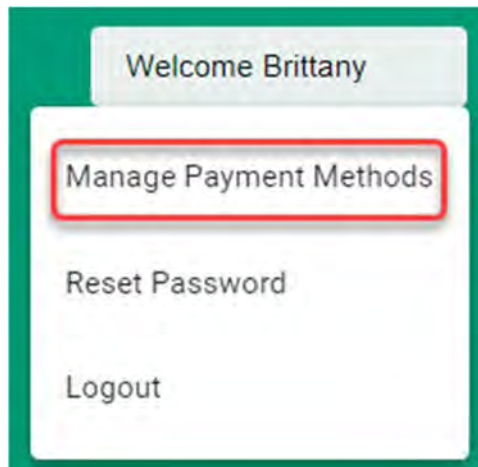


The screenshot shows a payment form with the following fields and options:

- Payment Type \***: A dropdown menu with "Credit Card" selected.
- Card Number \***: A text input field.
- Expiration Date \***: A date selector showing "01" for the month and "2023" for the year.
- ☒ **Default Payment Method**
- ☒ **Use Default Billing**
- Name on Card**: A text input field with "Brittany" entered.
- Address Line 1**: A text input field.
- Address Line 2**: A text input field.
- City**: A text input field.
- State/Province**: A dropdown menu.
- ZIP**: A text input field.
- Cancel**: A button at the bottom right.

## Subscribing to Electronic Receipts in the Customer Portal

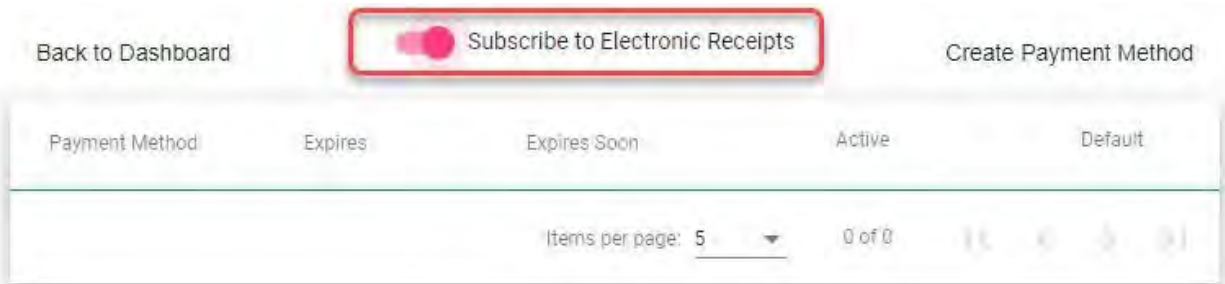
You have the option to **subscribe** to *Electronic Receipts* in the Customer Portal. This option can be turned on from the *Manage Payments* screen under the *Welcome* button.



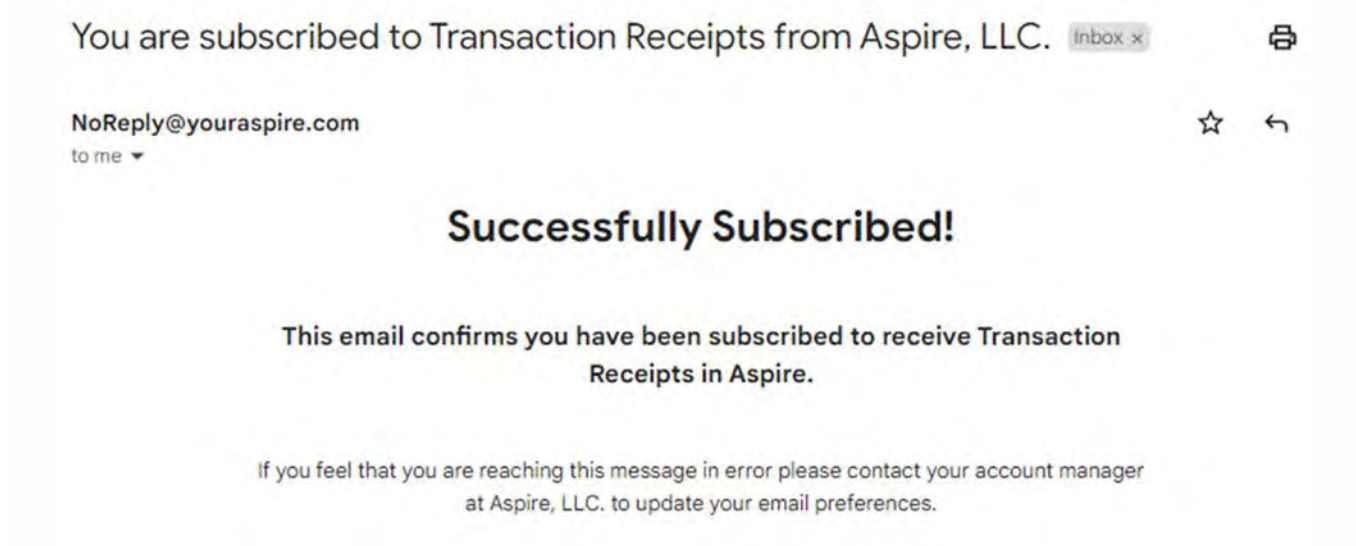
The screenshot shows a menu with the following items:

- Welcome Brittany**: A header or button at the top.
- Manage Payment Methods**: A button highlighted with a red rectangle.
- Reset Password**: A button.
- Logout**: A 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

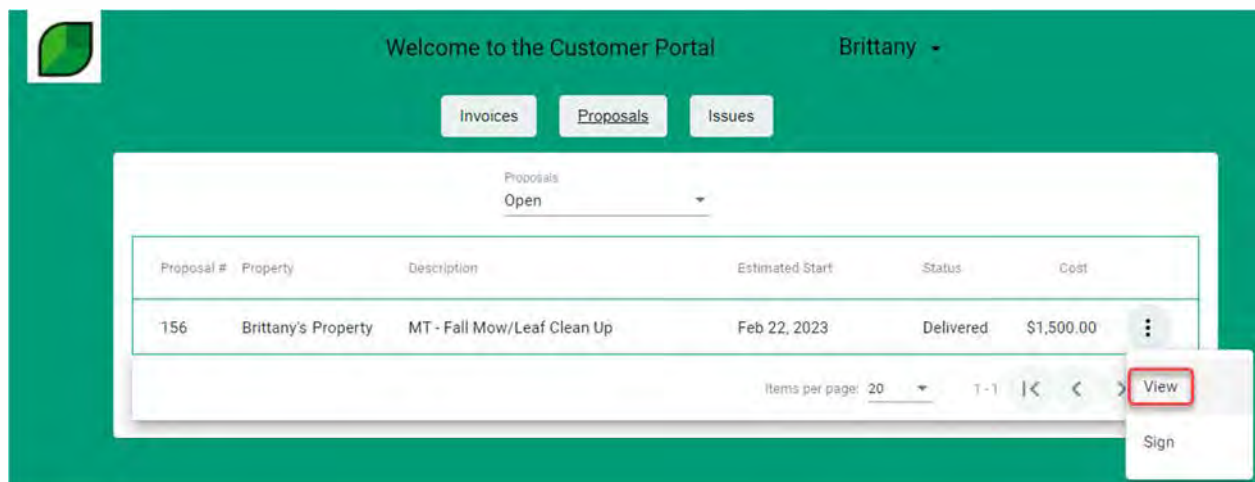
 **Note:** If you do not **see** *Proposals* displayed in the customer portal, **you can skip this section.**

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.

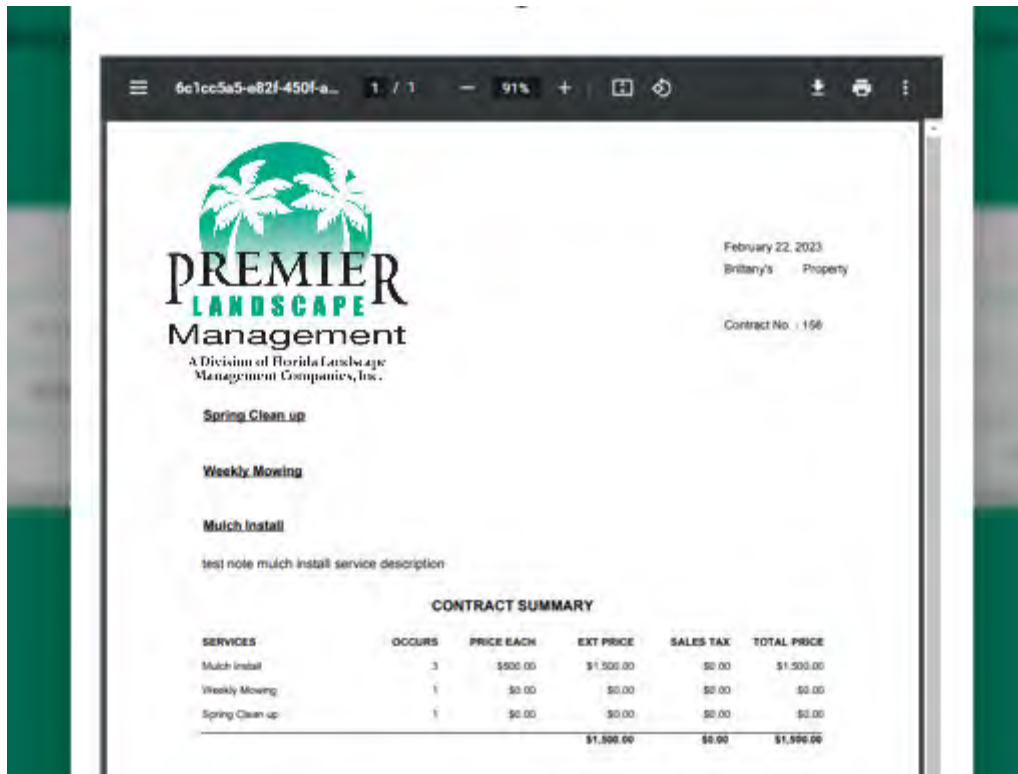
If you **receive** a *Proposal* for work, you can accept and **sign** inside your customer portal account with the use of an *Electronic Signature*!

## Viewing a Proposal

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

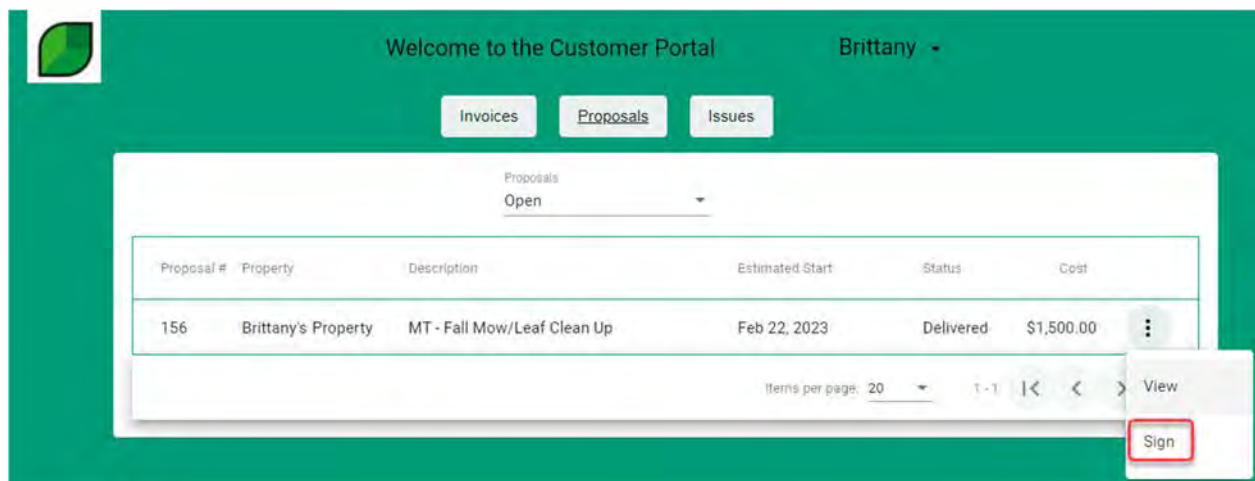


- Viewing will **display** a preview of the opportunity proposal to download and save or print.

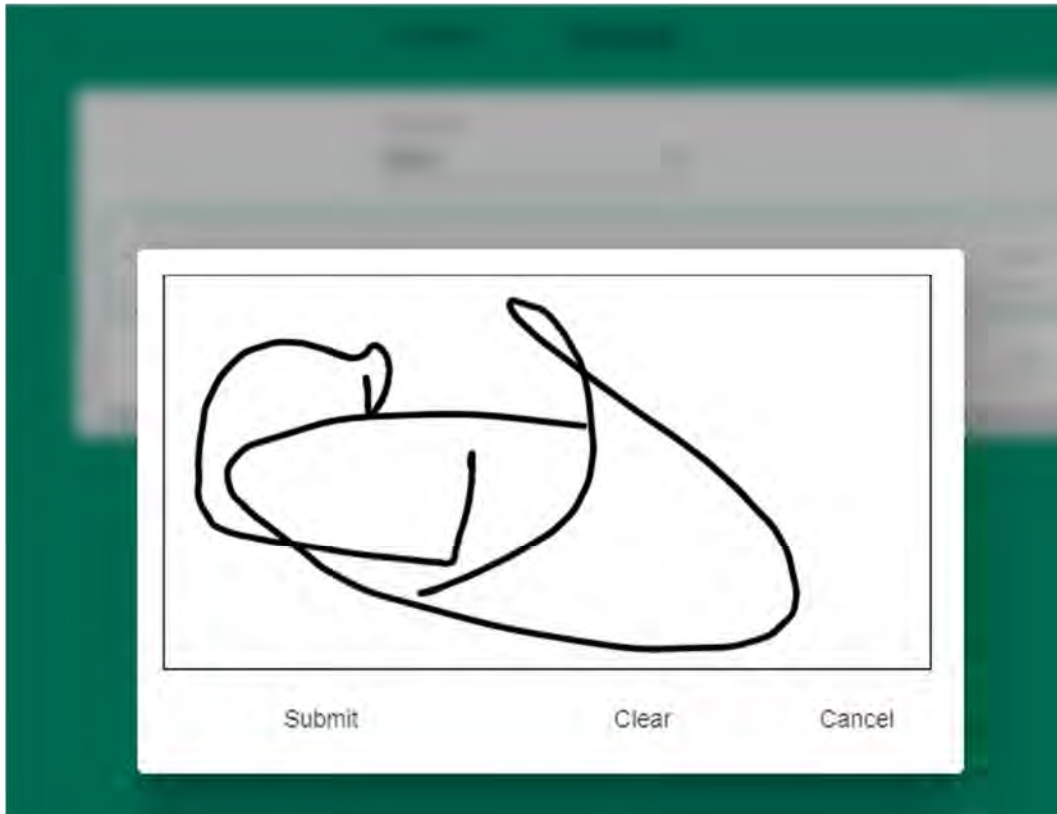


## Signing a Proposal

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.



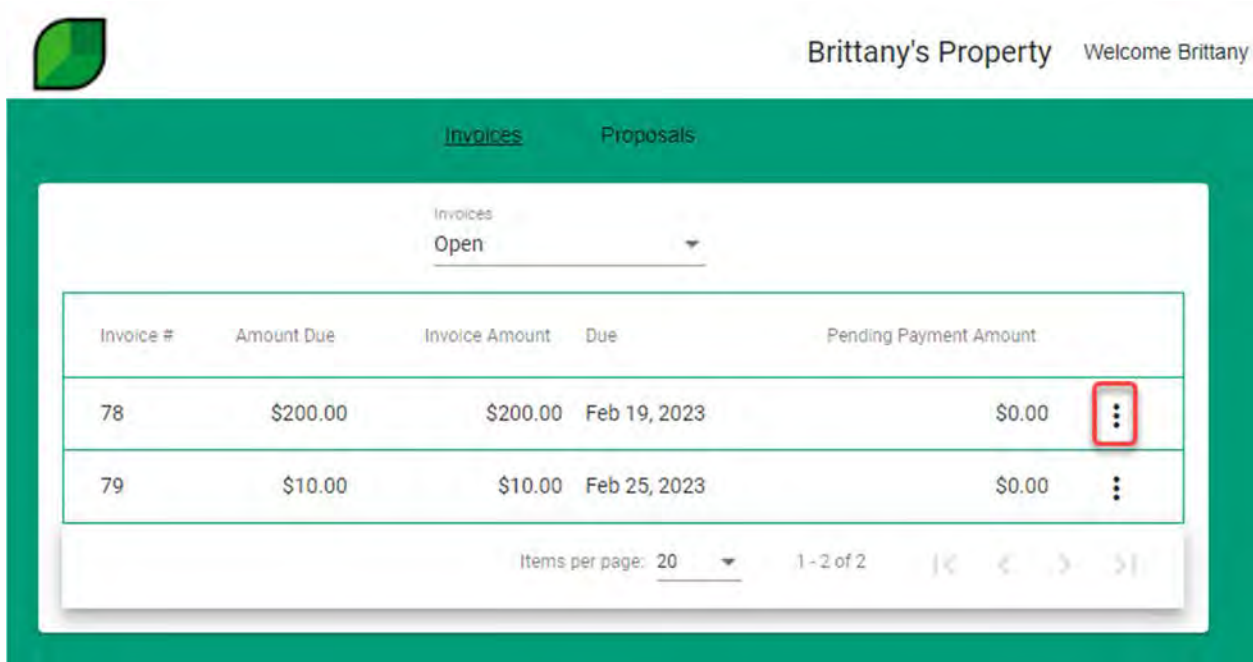
# Viewing and Paying Invoices

 **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*.



The screenshot shows the 'Brittany's Property' customer portal. The 'Invoices' tab is selected, and the 'Open' filter is applied. A table lists two invoices:

Invoice #	Amount Due	Invoice Amount	Due	Pending Payment Amount	
78	\$200.00	\$200.00	Feb 19, 2023	\$0.00	
79	\$10.00	\$10.00	Feb 25, 2023	\$0.00	

At the bottom, there is a pagination control showing 'Items per page: 20' and '1 - 2 of 2'.

- **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:

The image shows a digital invoice from Premier Landscape Management. At the top, there's a header bar with a menu icon, a document ID '2e20b384-bd6d...', page number '1 / 1', zoom level '90%', and icons for zooming, printing, and a settings menu. The Premier Landscape Management logo is on the left, featuring a palm tree and the text 'PREMIER LANDSCAPE Management'. To the right, an 'INVOICE' section contains a table with 'Date' (01/20/23), 'Invoice No.' (78), 'Terms' (Net 30), and 'Due Date' (02/19/23). Below this, 'BILL TO' is McDonalds Corp and 'PROPERTY' is Brittany's Property. A summary table shows 'Amount Due' as \$200.00 and 'Enclosed' as blank. A note says 'Please detach top portion and return with your payment.' At the bottom, a detailed table lists the service: '#157 - MT - Fall Mow/Leaf Clean Up January 2023' with a unit price of \$200.00, no sales tax, and a line total of \$200.00. A final 'Total' row also shows \$200.00.

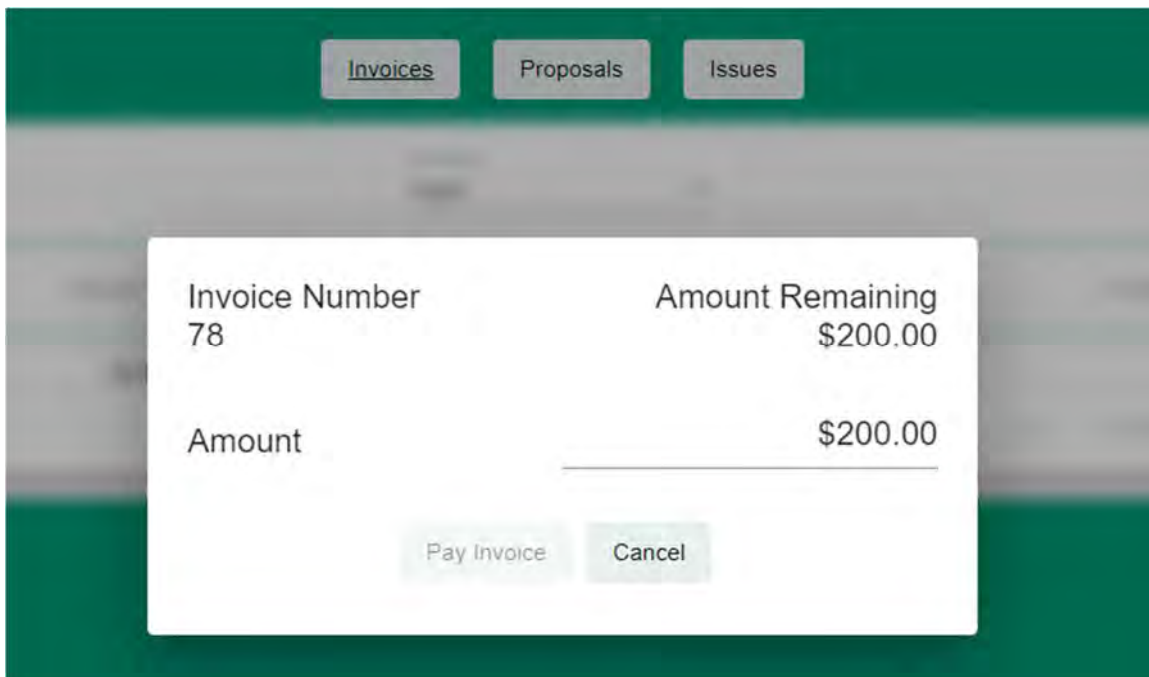
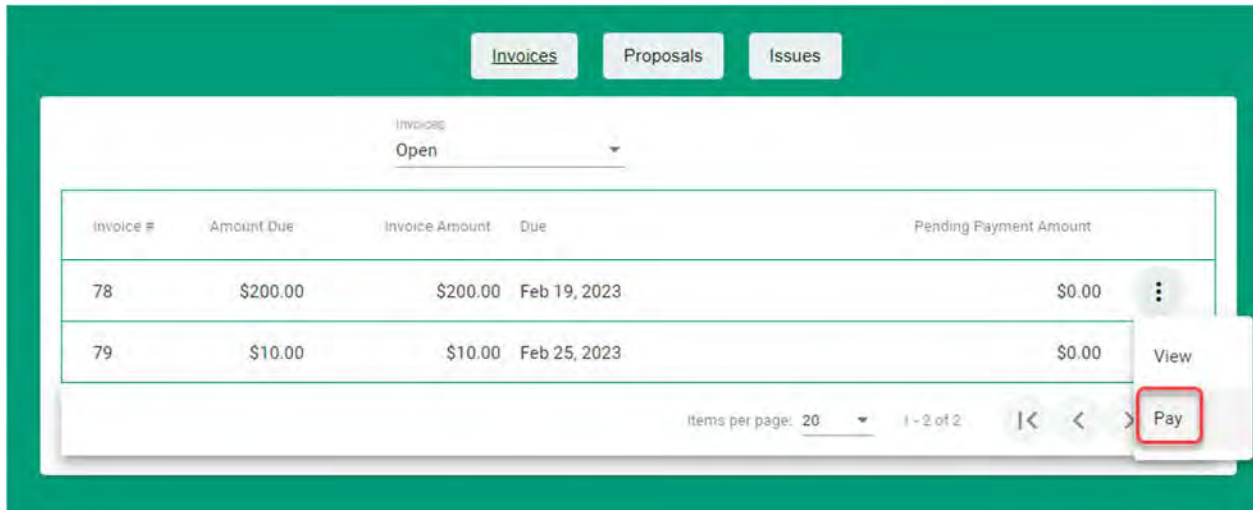
QTY	ITEM	UNIT PRICE	EXT PRICE	SALES TAX	LINE TOTAL
	#157 - MT - Fall Mow/Leaf Clean Up January 2023		\$200.00	\$0.00	\$200.00
	Total		\$200.00	\$0.00	\$200.00

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.

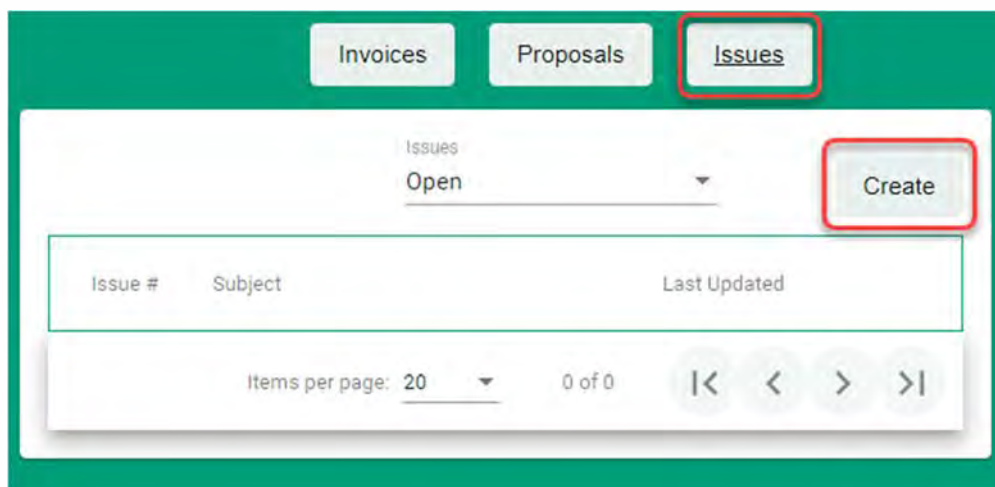


# Viewing Issues

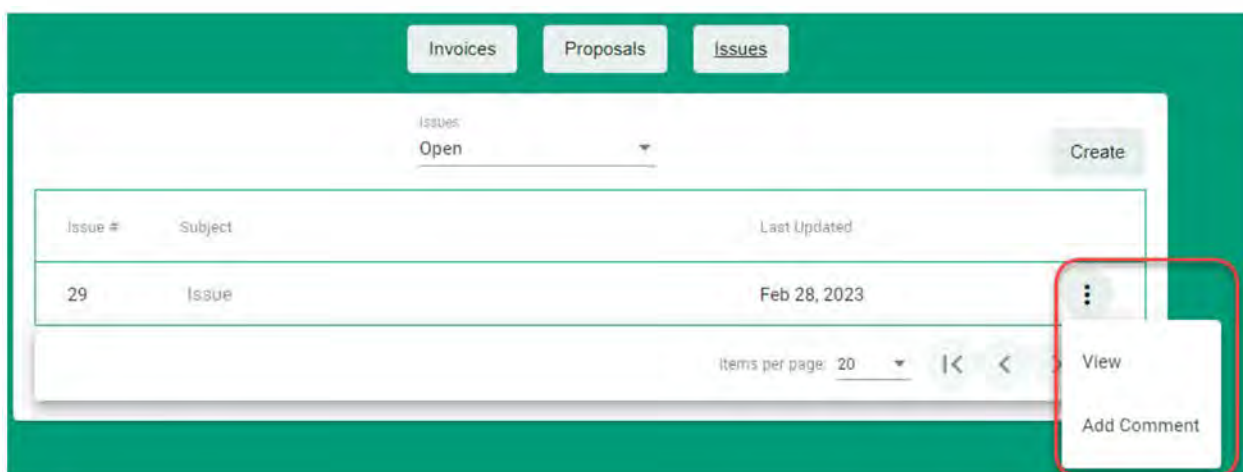
 **Note:** If you do not see *Issues displayed* in the customer portal, you can skip this section.

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.

Property

Subject

Mulch Spread issue

Priority

Normal

Created On	By	Comment
Feb 28, 2023	Camille	This should be corrected by the initial technician on the Job no later than 2/1/23

Close

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

Property

Subject


Mulch Spread issue

Priority

Normal

Notes/Description

Attachments (Each attachment can only be 10MBs, limit of 5)

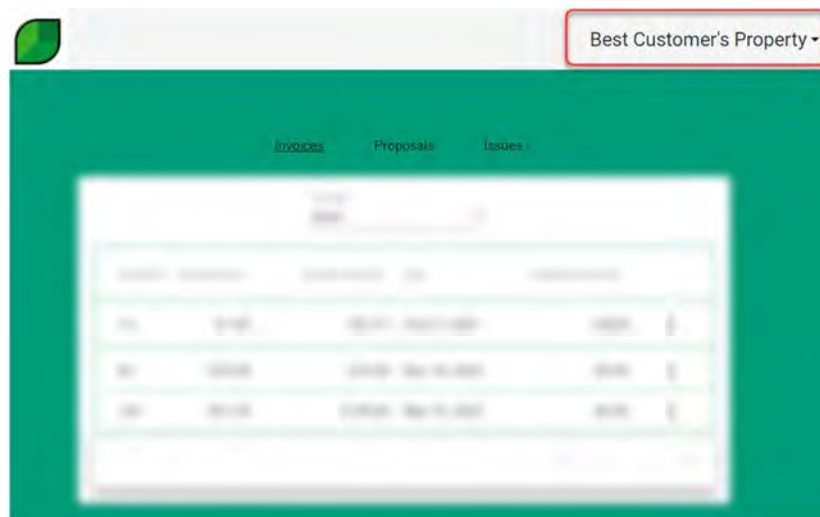
 Choose files...

Created On	By	Comment
Feb 28, 2023	Camille	This should be corrected by the initial technician on the Job no later than 2/1/23

Add Comment Cancel

# 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*.

