



Service **Autopilot**™

CLIENT PORTAL

MEMBER USER GUIDE

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Welcome to the Client Portal

The **Client Portal** is an additional subscription you can add to your Pro or Pro Plus Service Autopilot account that will give your clients the ability to manage their account and payments online.

With the Client Portal, your clients can:

- **See scheduled Visits**
- **Pay Open Invoices**

Your clients can make their own credit card Payments from the Client Portal any time they want. This can save you some of the headache of having to enter Payments manually. Instead, Payments will appear on the Client Account as they are made. The *Client Portal User Guide for Clients* outlines how your clients can make a credit card Payment.

- **Make ACH Payments**

If you are using ACH through SA Payments powered by Clearent, you can give your clients the option to pay using ACH. To ensure the security of their personal information, clients must add their own bank account information in the Client Portal. The *Client Portal User Guide for Clients* explains how your client can set up their bank information and use ACH to make a payment.

- **Open a Ticket**

If you enable the rights for this function, your clients can open new Tickets for their account. This gives them a convenient way to make requests, and lets you see their correspondence in one place.

The Client Portal User Guide for Members

This *Client Portal User Guide for Members* covers how to set up your clients and assist them with using the Client Portal.

The Client Portal User Guide for Clients

The *Client Portal User Guide for Clients* is a client-facing guide with step-by-step instructions for using the Client Portal and Manage Service app. Check out this guide to learn what your clients need to know; and we invite you to send the [PDF](#) to your clients.

“Don't judge each day by the harvest you reap but by the seeds that you plant.”

—Robert Louis Stevenson

Client Portal Settings

Go to **Settings > Client Portal Settings** to customize the Client Portal and choose the features you want your clients to use.

The settings are organized in multiple tabs to help you find what you need. Each tab has settings for the different areas of the Client Portal.

Client Portal Settings

Client Portal Display Name: A Great Company

Facebook Page: ServiceAutopilot

Twitter Handle: svcautopilot

Linkedin: service-autopilot

Custom Fields: Select Custom Fields

Select all items on current tab

Billing Services Tickets Alerts

Enable Client Portal Autopay

Allow Clients to Update or Remove Card on File

Allow Clients to Update or Remove Bank Account on File

Allow Clients to View and Make Prepayments

Card Max Payment Amount: 10000.00

ACH Max Payment Amount: 0.00

View Billing History

Save or [Cancel](#)

General Client Portal Settings

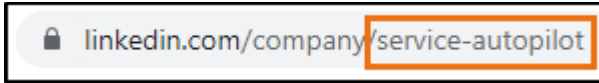
The fields are at the top of the overlay let you insert your company information:

- **Client Portal Display Name** - this is the name of your company that will display to clients in the Client Portal.
- **Facebook Page** - if your company has a public Facebook page, add the text between the final brackets of the URL to enable a Facebook widget in the Client Portal.



- **Twitter Handle** - add your company's Twitter handle to enable a Twitter widget in the Client Portal.

- **LinkedIn** - from your public LinkedIn page, copy the text at the end of the URL after the final slash and paste it into this field to enable the LinkedIn widget. Note that this URL will look different if you are currently signed into a LinkedIn account.



- **Custom Fields** - this selection determines what Custom Field values clients will be able to view and modify in the Client Portal.
- **Select all items on current tab** - selecting this box will select all items on the tab in view.

Billing Options

- **Enable Client Portal Autopay** - if enabled, this will allow clients to enroll in autopay so they do not need to log in to their account to manually pay invoices. Once a client has selected this option, any Invoices generated for Jobs created after that point will appear on the “Invoices to Charge” filter on the Invoices screen for you to bulk charge. Any existing, scheduled Jobs will update to be paid via autopay (bulk charge).

Note: if this setting is disabled, when a user updates their credit card on file this will update the default Payment Method on the Account to the credit card type entered.

- **Allow Clients to Update or Remove Card on File** - this option will allow users to modify the existing credit card on their account or to remove the card on file entirely.
- **Allow Clients to Update or Remove Bank Account on File** - checking this box will allow your clients to modify the existing bank account on file or remove it entirely.

Note: this option is available only for Members who are integrated with Clearent as a payment processor and have undergone the underwriting process for using ACH.

- **Allow Clients to View and Make Prepayments** - checking this box lets your clients make Prepayments from within the Client Portal and view them in their list of transactions. You will see these Payments in SA marked as Prepayments and not applied to any Invoices.

If you want the Prepayment to apply to specific services, you need to manually adjust this on the Payment once it has been made by the client. This setting is off by default.

- **Card Max Payment Amount** - this defaults to 0.00 and can be set to any amount. If a client attempts to make a payment through the Client Portal exceeding this amount, a warning message will display.
- **ACH Max Payment Amount** - this defaults to 0.00 and can be set to any amount. If a client attempts to make a payment through the Client Portal exceeding this value, a warning message will display.

Note: this option is available only for Members who are integrated with Clearent as a payment processor and have undergone the underwriting process for using ACH.

- **View Billing History** - allows your client to see a history of payment and credit transactions on their account.

Allow Clients to View Services

Client Portal Settings

Client Portal Display Name

Facebook Page

Twitter Handle

LinkedIn

Custom Fields

Select all items on current tab

Billing Services Tickets Alerts

View Service History

View Upcoming Services

Allow Clients to View Paused Services Clients will be able to see the text you enter into the "Pause Reason" field. So be careful to only enter information that you want your clients to see!

or [Cancel](#)

- **View Service History** - allows clients to see a list of past Services.
- **View Upcoming Services** - allows clients to see a list of future Services.
- **Allow Clients to View Paused Services** - when you pause a client's recurring service, this setting allows the client to see the services that have been paused.

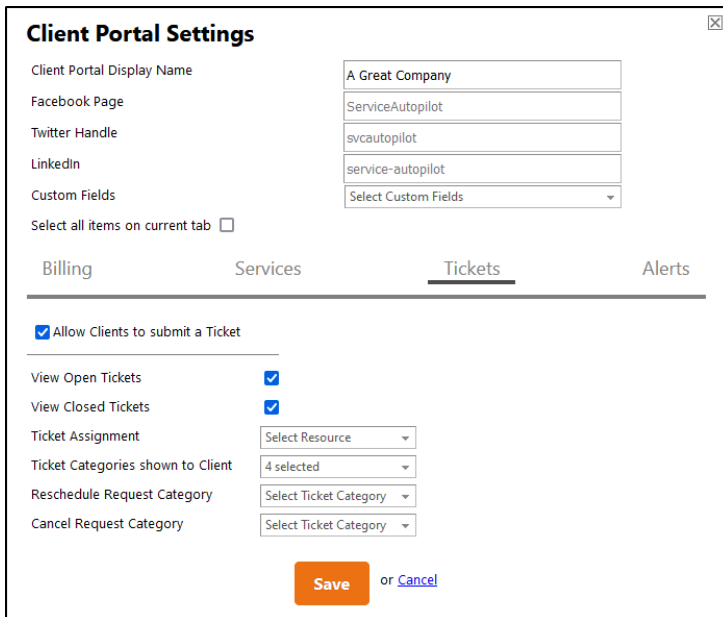
Note: Clients will be able to see the text you enter in the **Pause Reason** field, so be careful to enter only information that you want your clients to see. This setting is disabled by default.

Allow Clients to Create Tickets

If you grant permissions in the Client Portal Settings, your clients can open a Ticket from their account. The Ticket will be automatically assigned to that client and any Resource you've designated in Client Portal Settings.

1. Select the check box **Allow Clients to submit a Ticket**.

The client will see a small green icon at the lower-right corner of the Client Portal. The *Client Portal User Guide for Clients* explains the steps to create Tickets.



The screenshot shows the 'Client Portal Settings' window with the 'Tickets' tab selected. The 'Allow Clients to submit a Ticket' checkbox is checked. Below it, 'View Open Tickets' and 'View Closed Tickets' are also checked. The 'Ticket Assignment' dropdown is set to 'Select Resource'. 'Ticket Categories shown to Client' is set to '4 selected'. 'Reschedule Request Category' and 'Cancel Request Category' are both set to 'Select Ticket Category'. At the bottom, there are 'Save' and 'Cancel' buttons.

2. Select any of the following to appear to the client:

View Open Tickets - this setting allows the client to see a list of all Tickets with email correspondence and a status of open, pending, or on hold. All statuses appear to the client as “open” because the Ticket has not been resolved.

View Closed Tickets – this allows the client to see a list of Tickets with email correspondence that have a status of “closed.”

Ticket Assignment - if a client sends an email from their Client Portal account, it will come into SA as an open Ticket. This setting determines which Resource the Ticket will be assigned to automatically. Only one option can be selected.

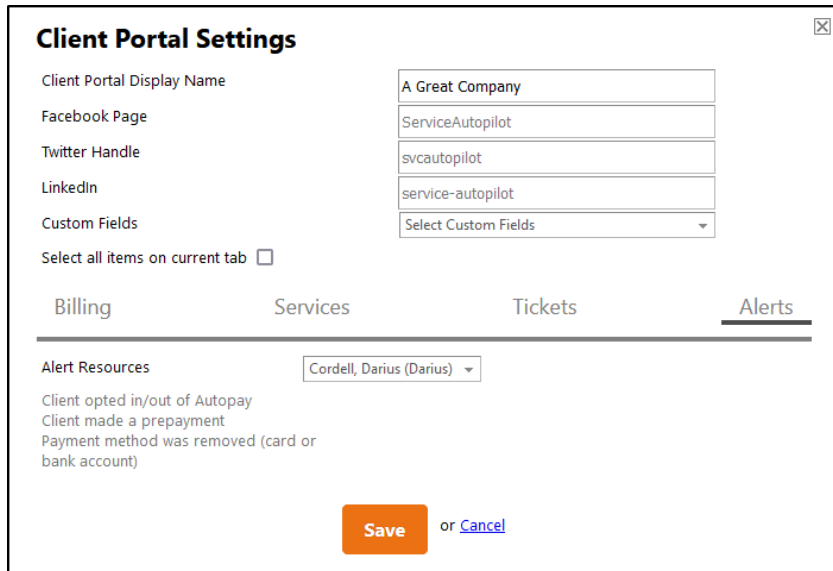
Ticket Categories shown to Client - this setting determines which Ticket Categories will be shown to clients when they submit a Ticket. Options you select here will appear to all Client Portal users.

Reschedule Request Category - this setting determines which Ticket Categories will appear when they submit a Ticket specifically to reschedule service.

Cancel Request Category - this setting determines which Ticket Categories will appear to clients when they submit a Ticket specifically to cancel service.

Receive Alerts from the Client Portal

In the Client Portal Settings, you can select Resources to receive alerts within SA for actions that clients take in the Client Portal. To do this, go to **Settings > Client Portal Settings** and select the “Alerts” tab:



The screenshot shows the 'Client Portal Settings' dialog box with the 'Alerts' tab selected. The dialog contains the following fields and options:

- Client Portal Display Name: A Great Company
- Facebook Page: ServiceAutopilot
- Twitter Handle: svcautopilot
- LinkedIn: service-autopilot
- Custom Fields: Select Custom Fields (dropdown)
- Select all items on current tab:
- Navigation tabs: Billing, Services, Tickets, Alerts (selected)
- Alert Resources: Cordell, Darius (Darius) (dropdown)
- Client opted in/out of Autopay
- Client made a prepayment
- Payment method was removed (card or bank account)
- Buttons: Save (orange) or Cancel (blue link)

Resources you select in the **Alert Resources** field will see alerts appear in SA on the bell icon in the navigation bar. Alerts generate based on one of these actions a client takes in the Client Portal:

- A client makes a Prepayment
- A client opts in OR out of autopay
- A credit card on file is removed from the Account
- A bank account on file is removed from the Account

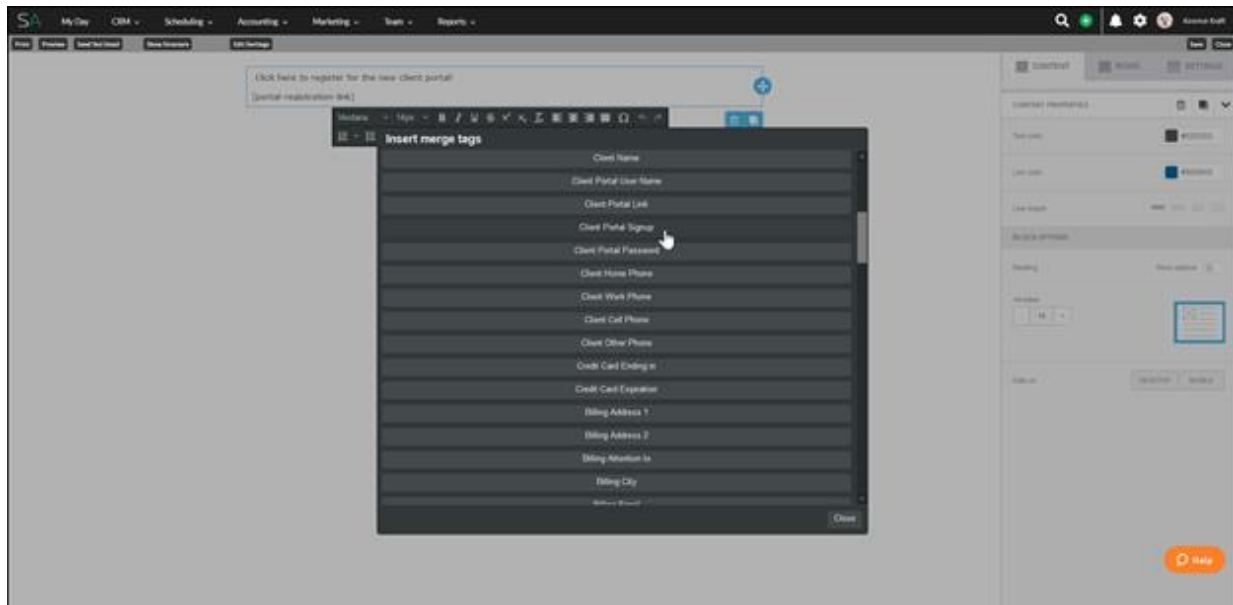
The alerts will also generate based on the same actions if they happen in the Manage Service app.

Note: Bank account information is available only to Members who are integrated with Clearent as a payment processor and who have undergone the underwriting process with Clearent for accepting ACH payments.

Create a New Client Portal User Account

To set up your client with the Client Portal, send them an SA email with a link to the registration page. To do this, include the Merge Tag “Client Portal Signup.”

Note: These instructions apply to Members who implemented the Client Portal after March 5, 2021.



After you send the email to your client, they should do the steps below to create their new Client Portal user account.

Note to Client Portal Users Before March 5, 2021

Any clients using the Client Portal before March 5, 2021, will enter their login credentials, and they will be redirected to step 5 below.

Client Instructions for Setting Up the Client Portal

After your client receives your email containing the Client Portal signup link, they need to create their user account by following the steps below. These are included here for your information and are also listed in the *Client Portal User Guide for Clients*.

1. Open the email containing the signup link.
2. Select the link [Click here to register](#). This link will open a setup wizard in your browser.

- In step 1 of the wizard, enter a username. This username must be unique across all Client Portal users, not just within the SA Member's account. (So you might have to try a different variation of their name.)

Step 1 of 4

Set Up Your Username

The username you create here will be used to sign in to our system and aren't case sensitive.

Username suggestions:

- ✓ Username cannot be an email address
- ✓ Username cannot have spaces
- ✓ Username only contains letters, numbers, periods, or underscores
- ✓ Username eight characters or more

Next

[Previous](#)

Already have an account?
[Log in](#)

- Click **Next**.
- Enter your password.

It must have eight or more characters, upper- and lowercase letters, at least one number, and at least one special character.

Step 2 of 4

Set Up Your Password

The password you create here will be used to sign in to our system.

Password rules:

- ✓ Password is eight or more characters
- ✓ Password cannot have spaces
- ✓ Password has upper and lowercase letters
- ✓ Password has at least one number
- ✓ Password has at least one special character (excluding: + @ & ' () < > # \ ")

Next

[Previous](#)

Already have an account?
[Log in](#)

- Click **Next**.

7. Answer three security questions.

This screenshot shows 'Step 3 of 4' titled 'Choose your security questions'. It includes three questions with dropdown menus and corresponding text input fields for answers. The questions are: 'What city were you born in?', 'What was the model of your first car?', and 'What is your favorite dessert?'. At the bottom, there are 'Next', 'Previous', and 'Log In' buttons, along with a link for 'Already have an account?'.

8. Click **Next**.

9. Review and accept the terms of use. You can also opt in to text message and email notifications.

10. Click **Next**. The page will reload and take you to a login screen.

11. Enter your new username and password to log in.

This screenshot shows 'Step 4 of 4' titled 'Review Our Terms of Use'. It contains a scrollable area with the text of the terms of use, a 'Last Modified' date of November 23, 2020, and two checked checkboxes: 'I Accept' and 'I would like to receive email and text notifications'. A green 'Next' button is prominent, with 'Previous' and 'Log In' links below it.

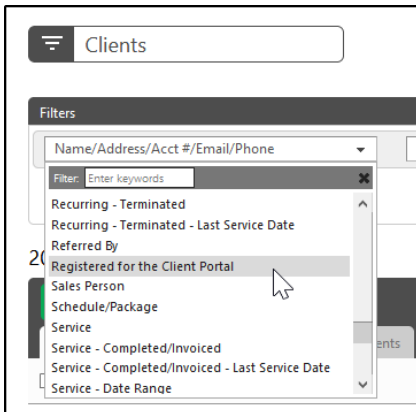
This screenshot shows the 'Welcome Back' login screen. It features a yellow notification banner at the top stating 'The Client Portal has been updated!'. Below this, there is a 'Welcome Back' heading and a 'Sign in to get started' prompt. The login form includes a username field with 'bigben24', a password field with masked characters, and a green 'LOG IN' button. At the bottom, there are links for 'Forgot Password?' and 'Terms/Conditions'.

View Client Portal Registrants

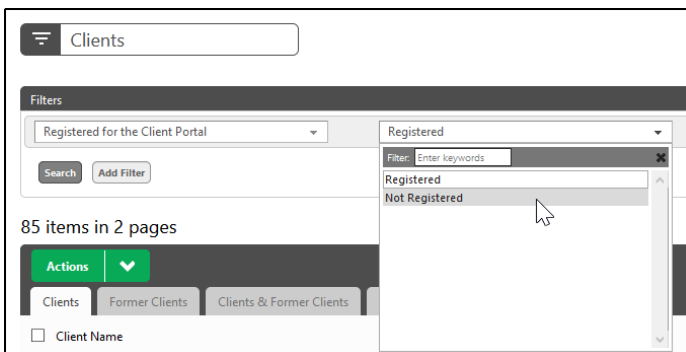
There are several ways to find out if your clients have registered for the Client Portal.

See Client Portal Registrants in the V2 Client List

1. Go to the V2 Client List at **CRM > Clients**.
2. Select the “Registered for the Client Portal” filter:



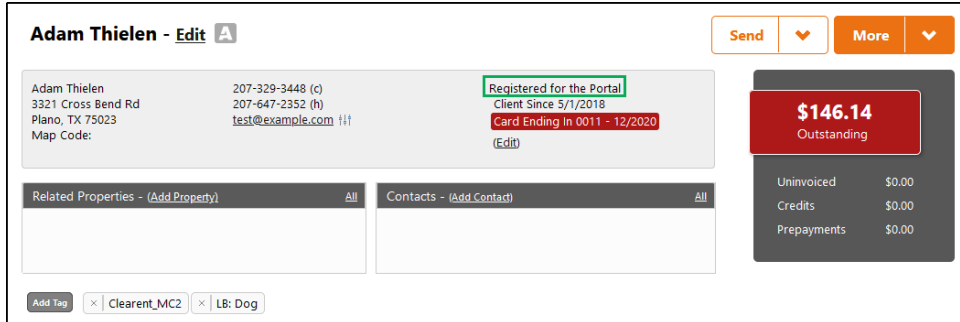
3. Set the filter to “Registered” or “Not Registered.”



4. Click **Search** to apply the filter.

See Client Portal Registrants in the V2 Client View

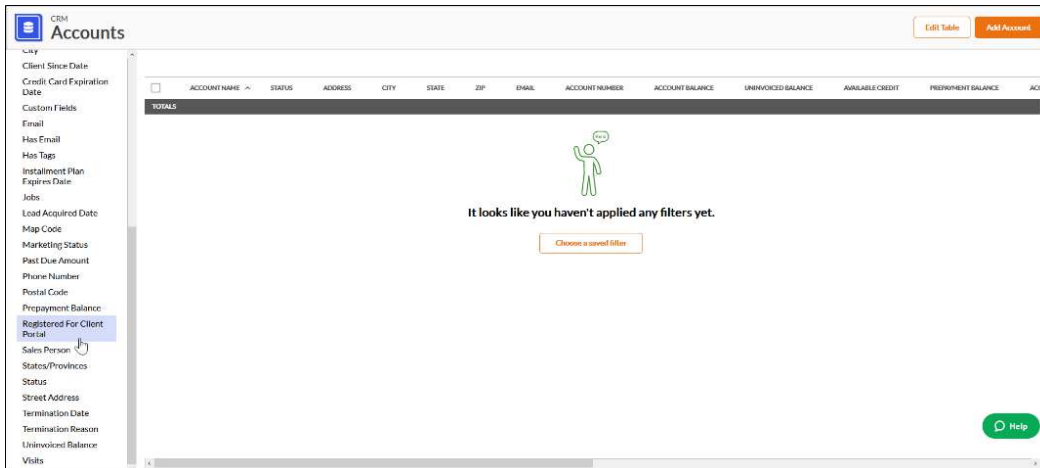
From the V2 Client view, you'll see text near the top that reads "Registered for the Portal."



If a client has not registered, no text will display in this area.

See Client Portal Registrants in the V3 Accounts List

1. Go to **CRM > Accounts**.
2. Click **Add Filter** and select "Registered For Client Portal."



3. Select "yes" or "no."

Registered For Client Portal

yes

no

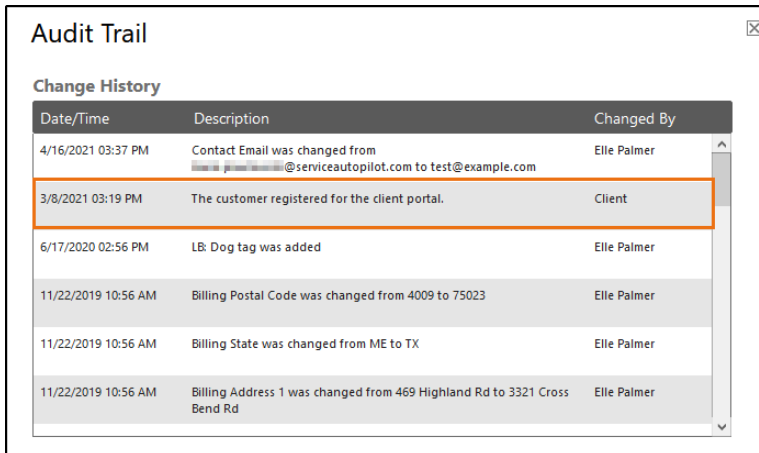
Update filter

4. Click **Update filter** to see the results.

Find the Client Registration Date

You can see when your client registered for the Client Portal in two places:

- The Audit Trail at **More > Audit Trail**.



Date/Time	Description	Changed By
4/16/2021 03:37 PM	Contact Email was changed from [redacted]@serviceautopilot.com to test@example.com	Elle Palmer
3/8/2021 03:19 PM	The customer registered for the client portal.	Client
6/17/2020 02:56 PM	LB: Dog tag was added	Elle Palmer
11/22/2019 10:56 AM	Billing Postal Code was changed from 4009 to 75023	Elle Palmer
11/22/2019 10:56 AM	Billing State was changed from ME to TX	Elle Palmer
11/22/2019 10:56 AM	Billing Address 1 was changed from 469 Highland Rd to 3321 Cross Bend Rd	Elle Palmer

OR

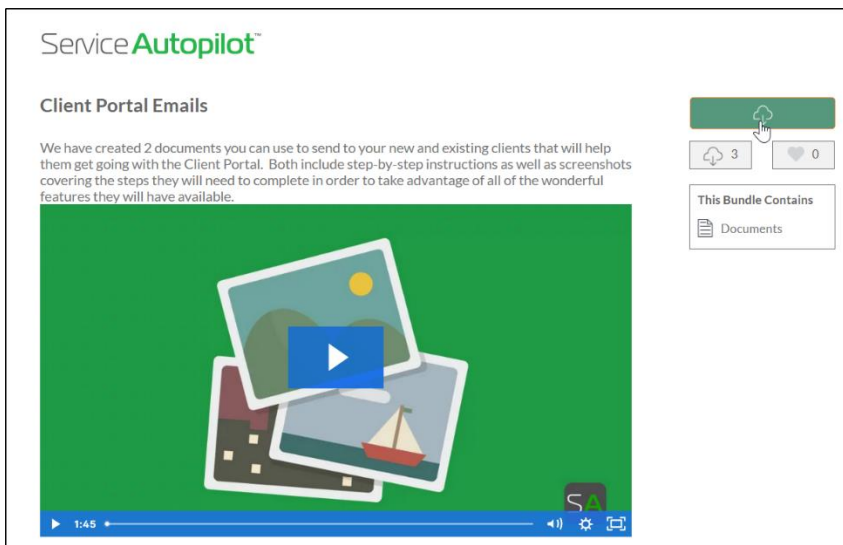
- On the **Account Review** overlay, you'll see the date the client registered for the Client Portal in the "Account Overview" panel.

Download the “Client Portal Emails” Bundle

We provide a free bundle of emails to in the Marketplace to save you the time and hassle of creating new Documents. The bundle contains two Documents that provide basic information about the Client Portal and instructions on how a new or returning user (your client) can create a Client Portal account.

Access the Marketplace bundle

1. In your SA account, hover over the avatar in the top-right corner of the screen and select “Marketplace” from the dropdown menu.
2. Search for “Client Portal Emails” in the Marketplace search bar to view information about the bundle.
3. Click the green download button to download the items into your account:



View the Documents

1. Go to **Settings > Documents**. You will see your new downloads listed as “Client Portal - New Client” and “Client Portal - Update Existing” along with the date you downloaded the bundle.
2. Edit the Documents. We strongly recommend that you edit your Documents to have your company logo at a minimum, before sending them to your clients.

Help Your Clients with the Client Portal

The Client Portal is designed to help your clients help themselves to complete tasks such as making Payments and keeping track of Services. But if they have trouble, here are some tools you can use.

Client Forgets Their Password

You cannot view or reset a client's password from within SA. As a matter of security, clients must reset their own passwords.

To reset a password, the client needs to know either:

- Their **username** and the answers to their security questions
- OR
- The **email address** for the account

Your client should follow the steps listed in the *Client Portal User Guide for Clients* to reset their password in the Manage Service program or app.

Client Forgets Their Username

If a client can't remember their username, you can see it if they have registered in a number of ways. You can view their username on the **Account Overview** panel of the **V3 Review Account** overlay:

ACCOUNT OVERVIEW	
STATUS	ACTIVE
ACCOUNT #	59
ACCOUNT SINCE	09/26/2019
PORTAL USERNAME	shawabanana
REGISTERED FOR CLIENT PORTAL	09/26/2019

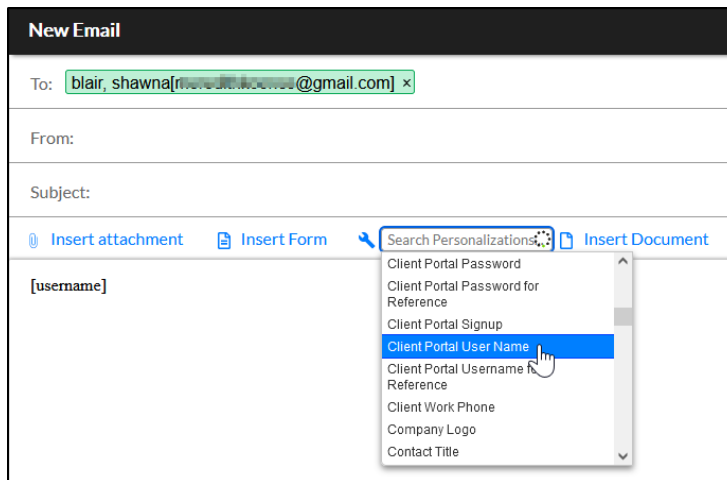
Send Client's Username with Merge Tags

Merge Tags let you inform your client of their login name without you seeing the information.

Note: You cannot view or reset client passwords from within SA. As a matter of security, clients must reset their own passwords.

Follow these steps to send the username to your client.

1. Send an email using the “Client Portal User Name” Personalization Field for the client’s username:



The Merge Tag will appear as [username] to you, but the actual username will appear to the client when they receive the email.

2. Once they have their username, the client can reset their password on their own.

Note: Resending the signup link will NOT allow your client to change their username or password. This link works only once per Account.

Merge Tags for the Client Portal

Merge Tags are personalization fields you can add to any Document or email within SA. When you send the item to a client, the field will personalize based off the information in their Account.

Here are the Merge Tags related to the Client Portal:

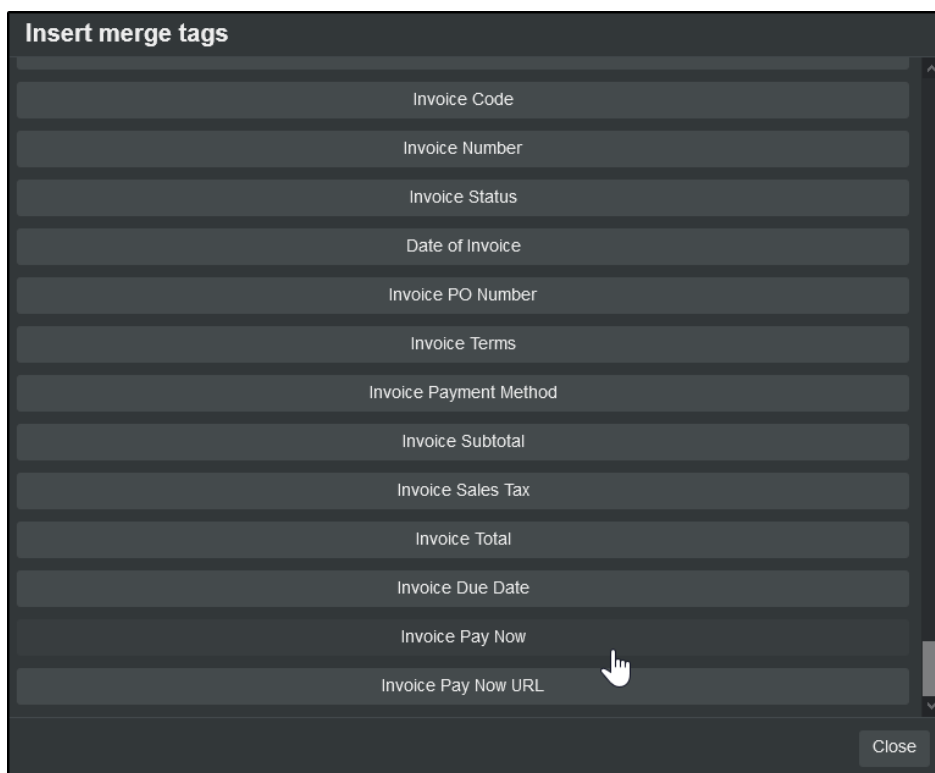
- **Client Portal Link** - This will appear your full Client Portal URL as a clickable link.
- **Client Portal Signup** - This will send your client a secure registration link that’s associated to their Account. When they click the link, a verification code will be automatically filled for the client so they can begin the registration process.
- **Client Portal User Name** - This will appear as your client’s username for the Client Portal.
- **Client Portal Password** – *This option is no longer valid.*

Invite a Client to Guest Checkout

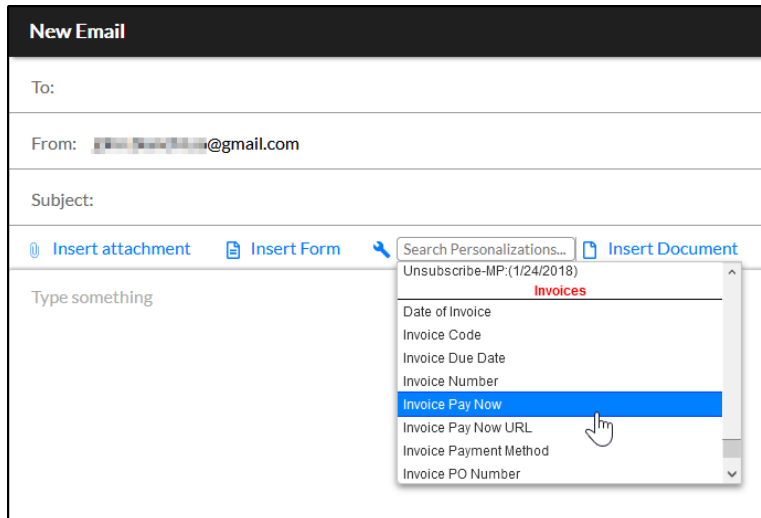
Your clients can pay single invoices without creating a Client Portal account. This is useful if you have clients who have one-time services as opposed to recurring services. Simply email a link to them containing a Merge Tag, then the client can click it to access the CP and pay their invoice.

Send an Email with Merge Tags

There are two Merge Tags you can use in your Invoice Email Documents that will take your clients directly to guest checkout, "Invoice Pay Now" and "Invoice Pay Now URL."



You can see these Merge Tags in the Document Editor only on Documents with a type of “Invoice Email.” They also appear in the Personalization selector on any email overlay regardless of the Document applied:



- **Invoice Pay Now Merge Tag** - this Merge Tag will display as a hyperlink reading “Pay Now.”
- **Invoice Pay Now URL Merge Tag** - this Merge Tag will display as a full URL directing the client to your Client Portal.

If the client clicks either link, it will take them to the same location as described below.

Note: For instructions on how to make the “Invoice Pay Now URL” Merge Tag into a button in a Document, see [“Add a Merge Tag to a Button in a Document”](#) in the SA Help Center.