

## Setting up your Customer Portal

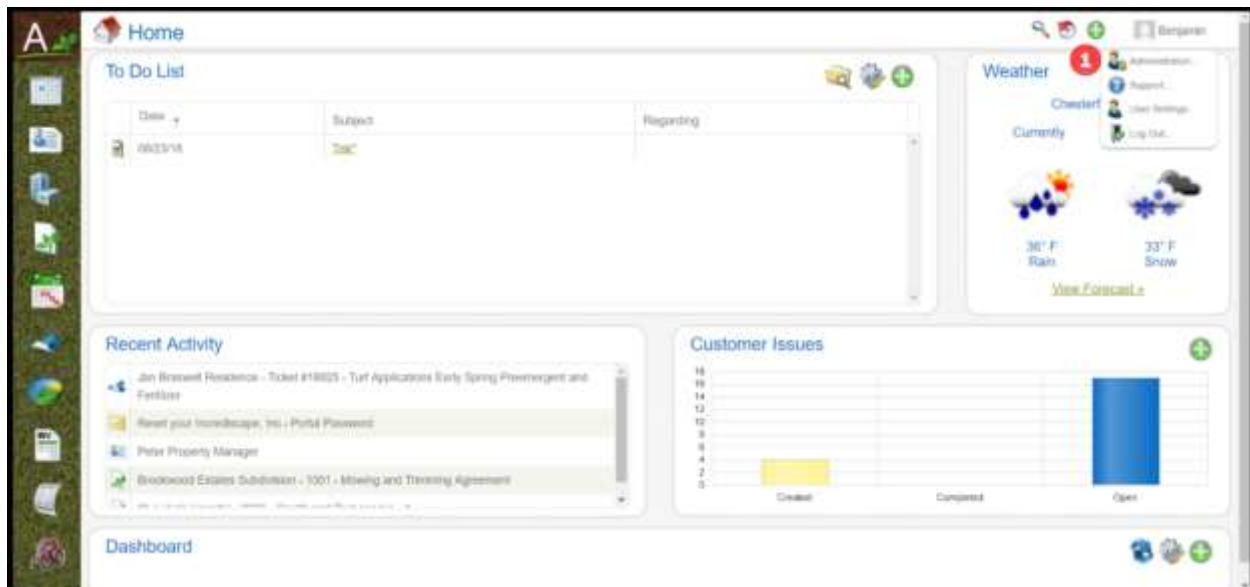
To set up your Customer Portal where your customers can view and create Issues; and view Proposals; and view and pay Invoices as well as enter and update their credit card or ACH (e-check) information. You can also set up an email template to send to your customers as well as design how your company's portal appears.

### Prerequisites

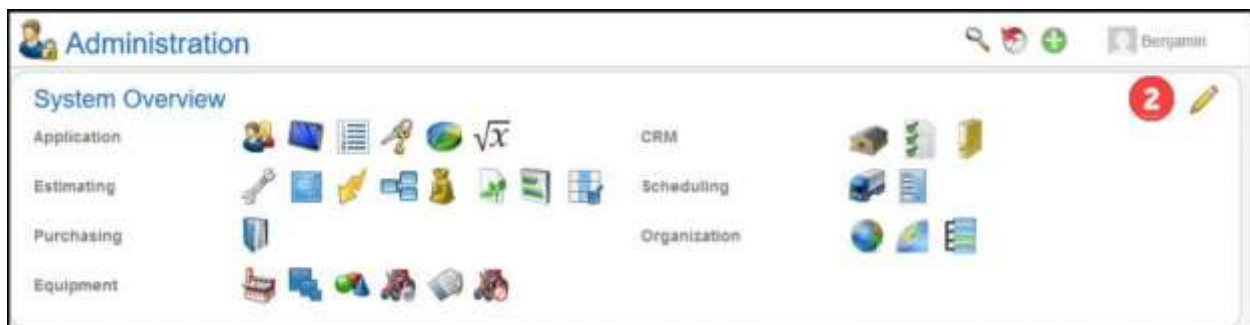
- Administration access

To set up the Customer Portal, create an email template, and design your Customer Portal, follow these steps:

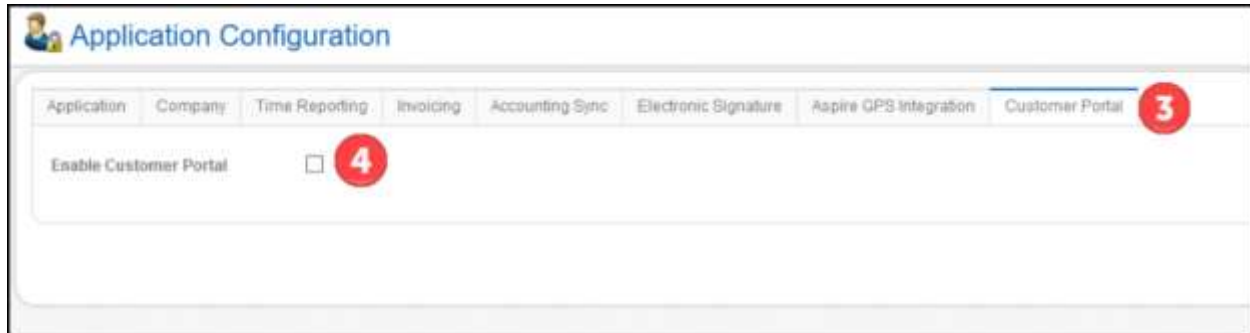
1. Hover over your name and select Administration



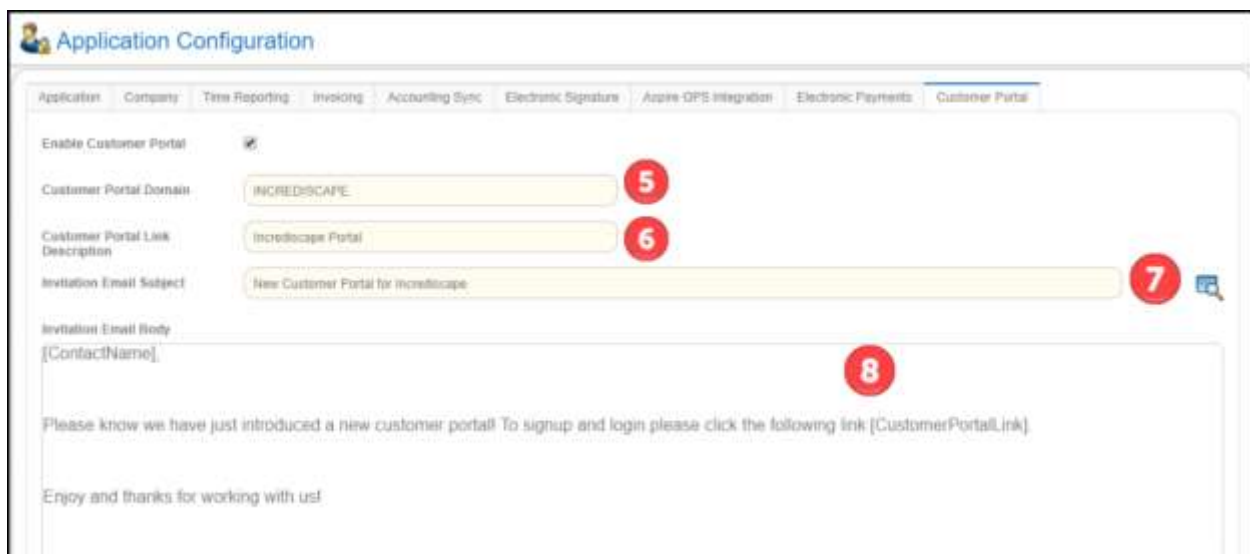
2. Click on Edit Application Configuration, the pencil



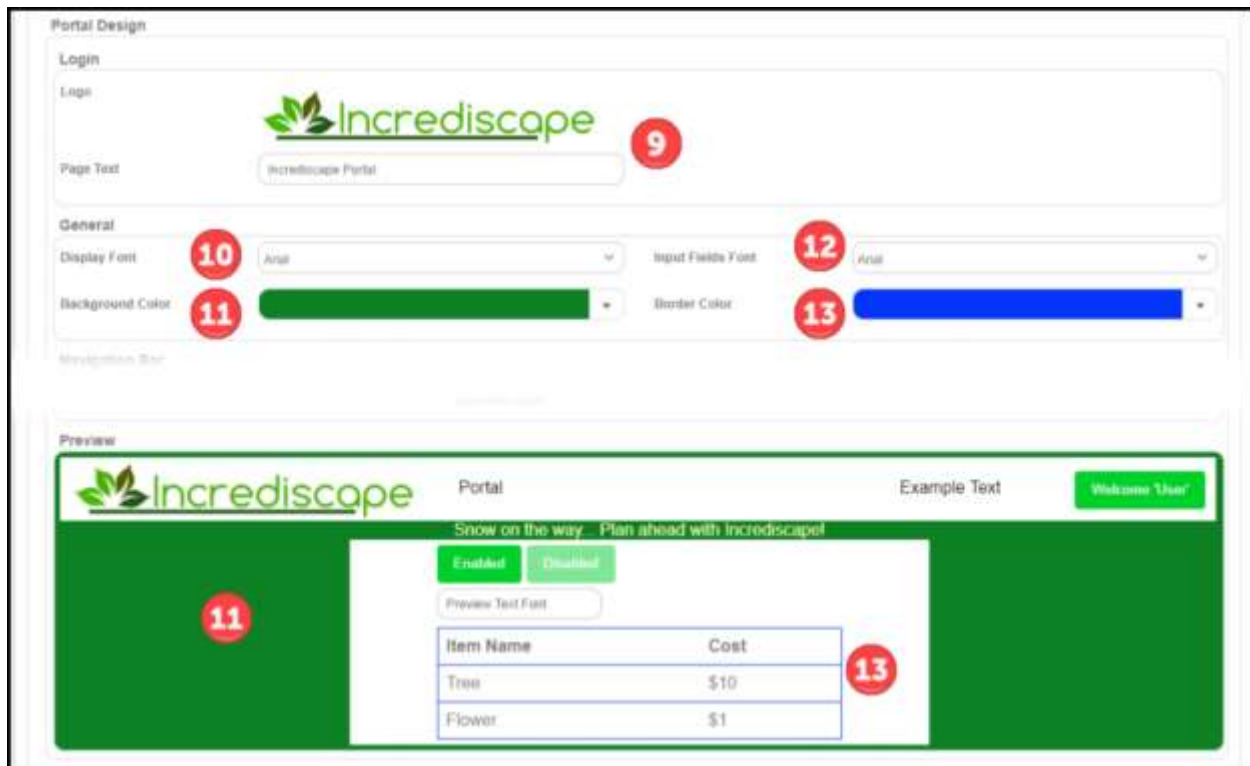
3. Select the Customer Portal tab
4. Put a checkmark in the Enable Customer Portal checkbox. Several fields and sections will appear. The instructions below will start from the top to the bottom



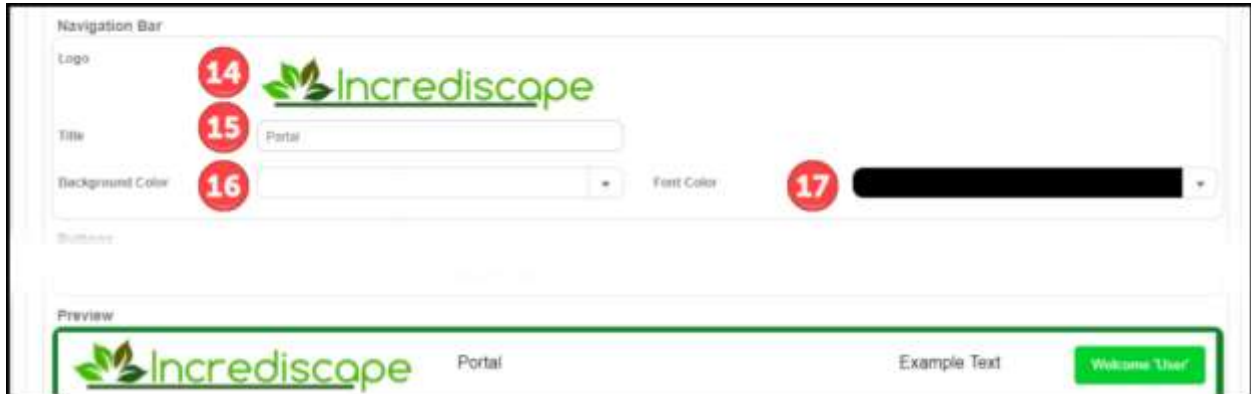
5. Type in the domain name that you would like to have in the url. A common example would be your company's name. the url will be your Customer Portal Domain name.propertyserviceportal.com. in the example below, the url for ACME's customers would be acme.propertyservices.com
6. Type in a Customer Portal Link Description. This is what the customer sees instead of [Customer Portal Link Description] token when used in the email below
7. Type in a welcoming subject for your customer. This email template is used on the Contacts List to send a Customer Portal Invitation. To read that article, click here. *NOTE: There are only two tokens that can be used in the Email Subject and Body, Contact Name and Customer Portal Link*
8. Write the Email Template in the Invitation Email Body. This can always be changed when sending it to your customers



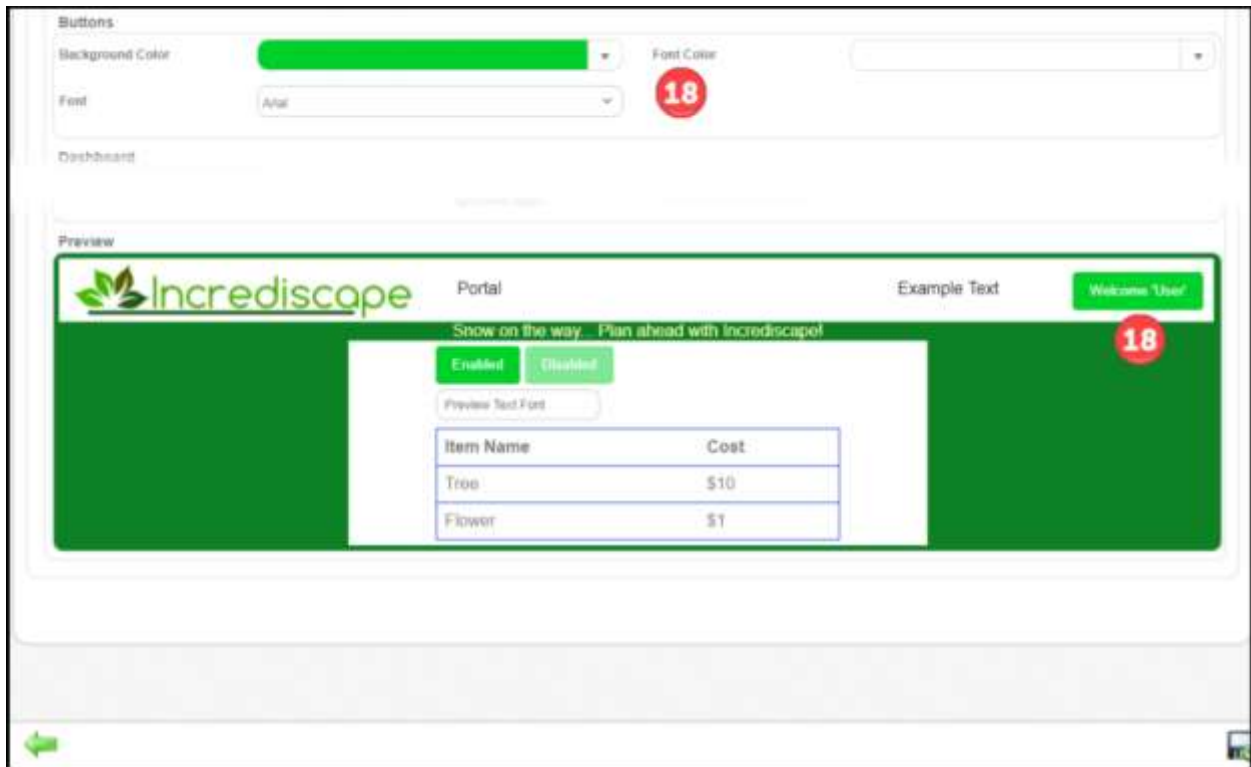
9. The Login Section is what your customer's will see on your login page only. You can insert your logo and the Page Text
10. The General section is for every page in your customer portal. The Display Font is the text that the fields will be
11. Pick the background color will be on every page. At the very bottom is the preview section where you can view these
12. Pick what font the customer should type in on your customer portal
13. This is the border inside the webpage. At the very bottom is the preview section where you can view these



14. Find a Logo to put in your Navigation Bar
15. Type in a Title for your page if desired
16. Pick the Background Color for the Navigation Bar
17. Pick the Font Color for the Navigation Bar



18. Pick the Background Color, the Font Color, and the Font for the Buttons



19. Write a dashboard message, if desired. You can change this whenever you want. Pick the Font and the Font color for the message as well
20. Put a checkmark what the customer can be able to view: Invoices, Issues, and Proposals and type how many days the proposals can be viewed
21. Press Save. After you save the Customer Portal, your domain will appear on the Customer Portal tab in the Application Configuration

**Dashboard**

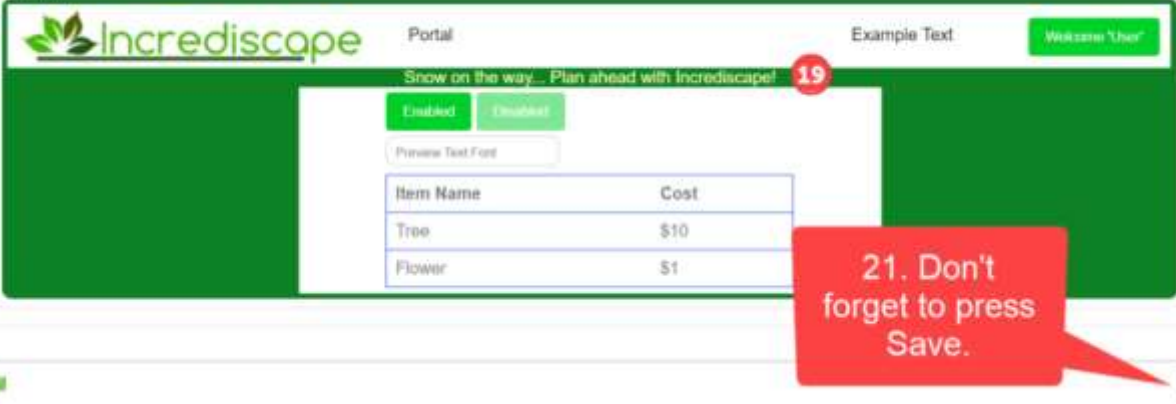
Dashboard Text:  **19**

Font Color:  Font:  **19**

Show Invoices:  Show Proposals:  **20** Show Issues:

Show only Proposals within specified days:

**Preview**



Example Text:

Enabled  Disabled

Preview Text Font:

| Item Name | Cost |
|-----------|------|
| Tree      | \$10 |
| Flower    | \$1  |

**21. Don't forget to press Save.**

**Application Configuration**

Application: Company Time Reporting Invoicing Accounting Items Electronic Signature Aspire GPS Integration **Customer Portal**

Enable Customer Portal:

Customer Portal Domain:

Customer Portal Link Description:

Invitation Email Subject: