ServiceAutopilot™

CLIENT PORTAL

USER GUIDE FOR CLIENTS

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About the Client Portal

Your service provider has invited you to use the **Client Portal**, which lets you manage your account and make payments online.

With the Client Portal, you can:

- Pay Invoices (page 5)
- See upcoming and past visits from your service provider (page 7)
- View your account information (page 8)
- Make ACH Payments, if supported by your service provider (page 20)
- Use the **Manage Service** mobile app for most actions (page 22)

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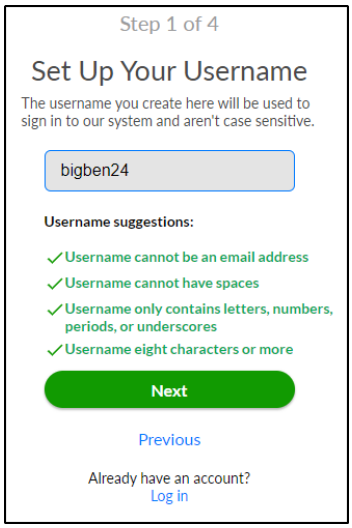
Set Up Your New Account

Your service provider will send you an email with a link to the registration page. After you receive it, follow these steps to set up your new Client Portal account.

1. Open the email containing the signup link.
2. Click the link **Click here to register**. This will open a setup wizard in your browser.
3. In step 1 of the wizard, enter a username for yourself. It must have eight characters or more and be composed of letters, numbers, periods, or underscores.

   Note: Your username must be unique among all users of this program, so you might have to try a few options till you find one that is accepted. A common method is to append numbers after your name.



4. Click **Next**.

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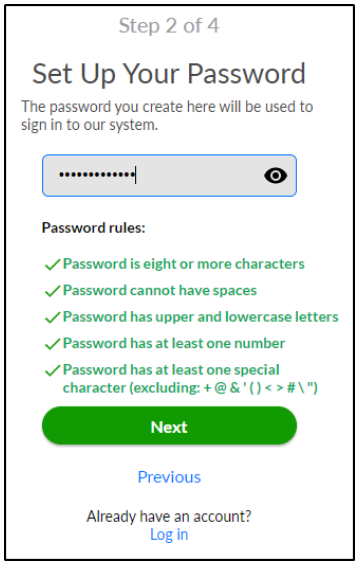
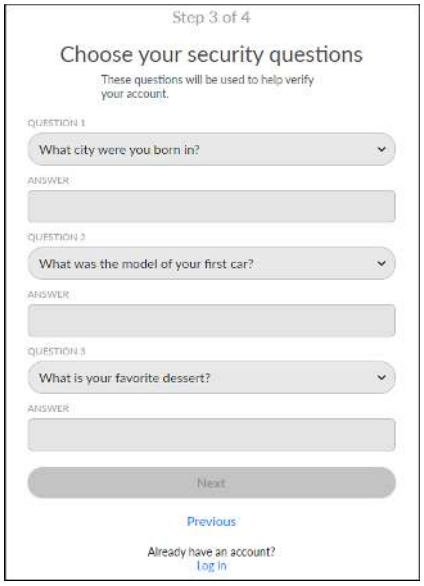
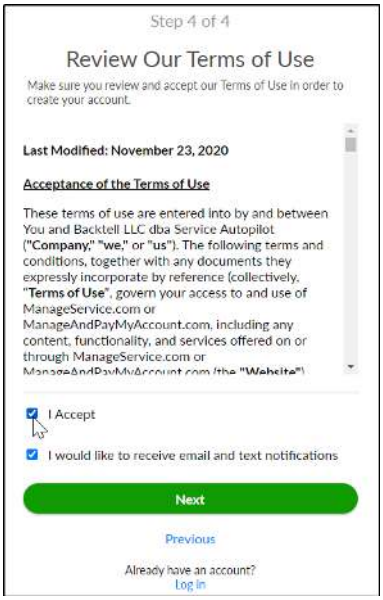
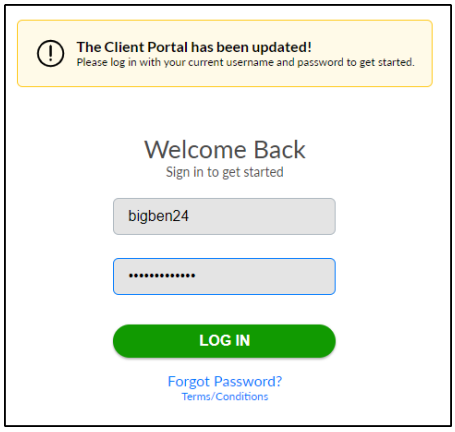
5. Enter your password. It must have eight or more characters, upper- and lowercase letters, at least one number, and at least one special character.
6. Click **Next**.
7. Answer three security questions.





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.





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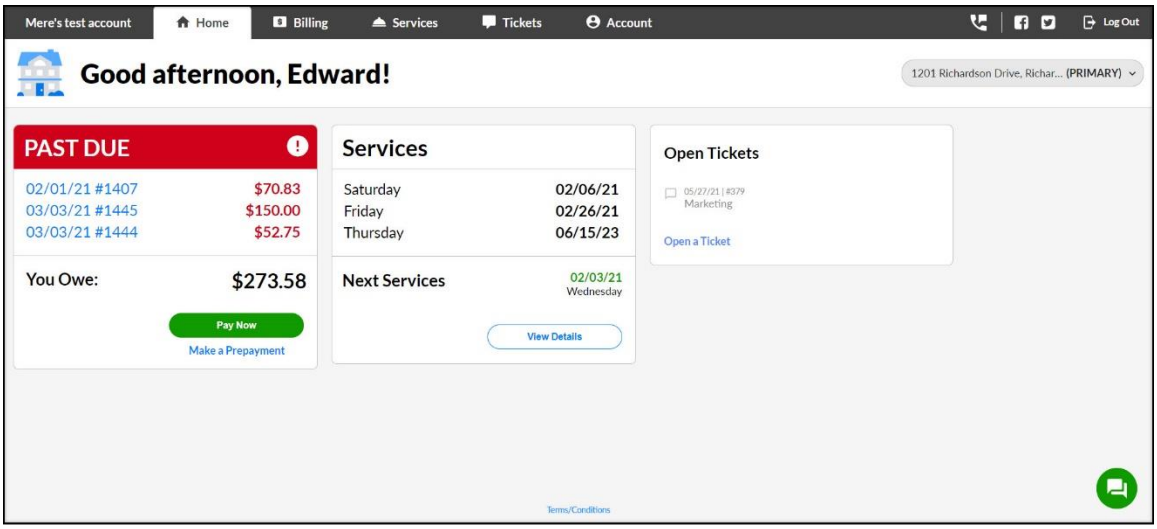
Using the Client Portal

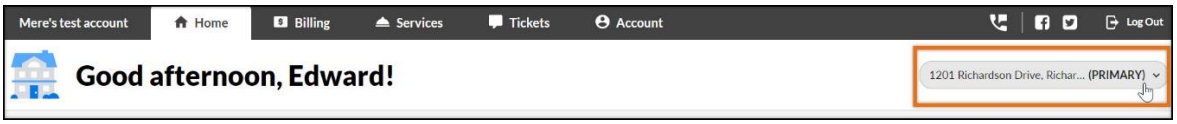
Once you log into Client Portal, you'll have several options for what to do next. The options available depend on how your service provider set up your account.

After logging in, you'll see the home page:



The navigation bar at the top shows the Display Name, different tabs you can access (described below), a contact menu containing the company email and phone number, social media widgets, and the option to log out.

If your company has Related Properties, select from the dropdown list to view different properties:



If you have one Account, the dropdown list will appear gray as in the screenshot above.

You'll see a list of past due Invoices along with an option to **Pay Now** and a list of Services with the option to view more details. Read on for instructions on paying your invoices.

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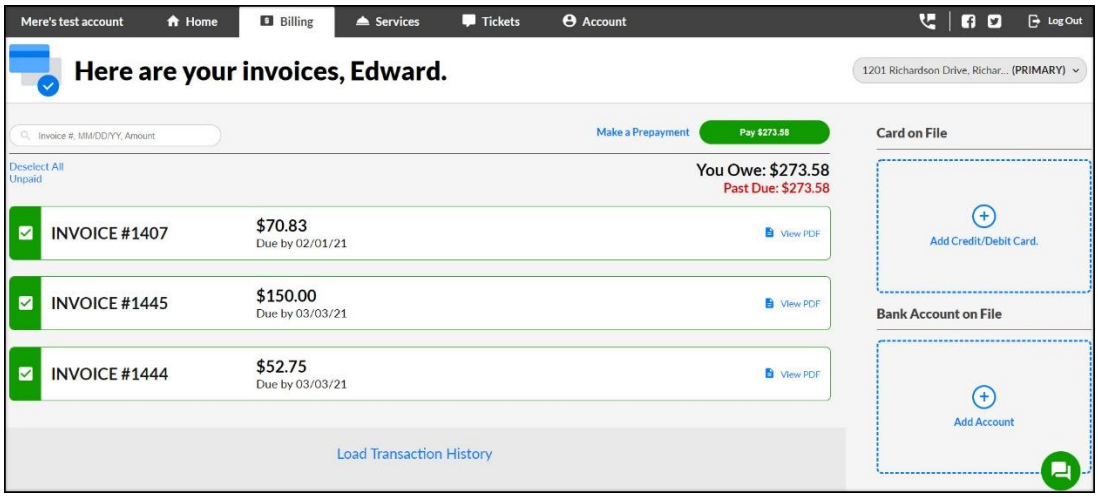
Manage Payments

From the “Billing” tab, you have several options to manage your payments. Unpaid Invoices appear in a list that you can search by Invoice Number, date, or amount.

Make a Payment

By default, all outstanding Invoices will be checked so you can make a single payment for all.

1. Click **Select All Unpaid** or click individual Invoice lines that you want to pay:



2. Click the green **Pay** button at the top of the table. Paying an Invoice will open a screen to confirm the Payment Method and make the actual Payment.

Make a Prepayment

You might have the option to make Prepayment if you are set up to do this.

Click the blue **Make a Prepayment** link next to the green **Pay** button. Prepayments will not automatically apply to any existing Invoices or scheduled services.

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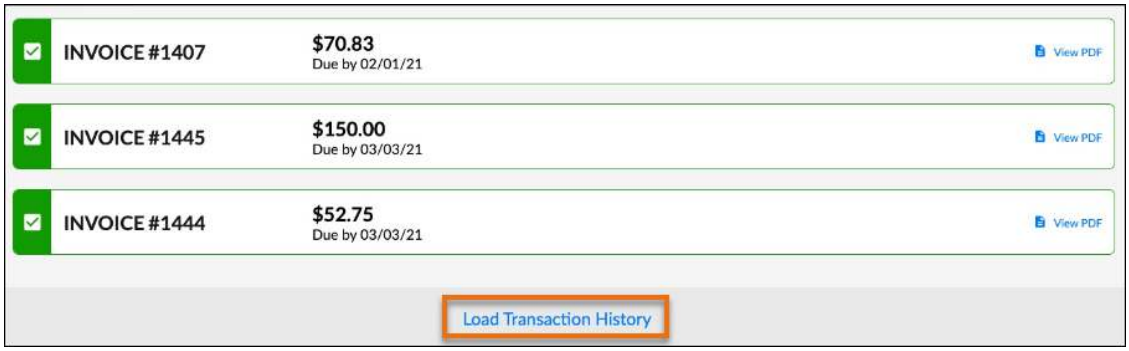
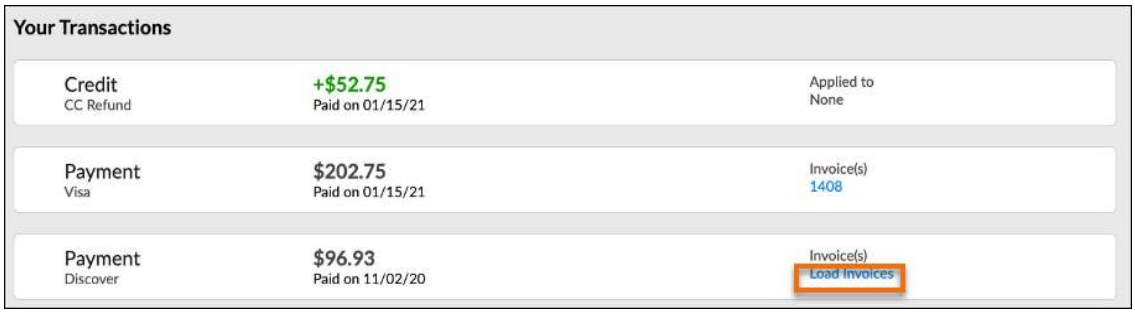
See Your Current and Past Transactions

From the “Billing” tab, you can:

- View PDFs of each individual outstanding Invoice.
- See a list of previous payments and credits by clicking **Load Transaction History**.



- Click **Load Invoices** under any payment to view the invoice(s) it’s associated with.



Add a Credit Card

From the “Billing” tab, you can add a credit card to remain on file.

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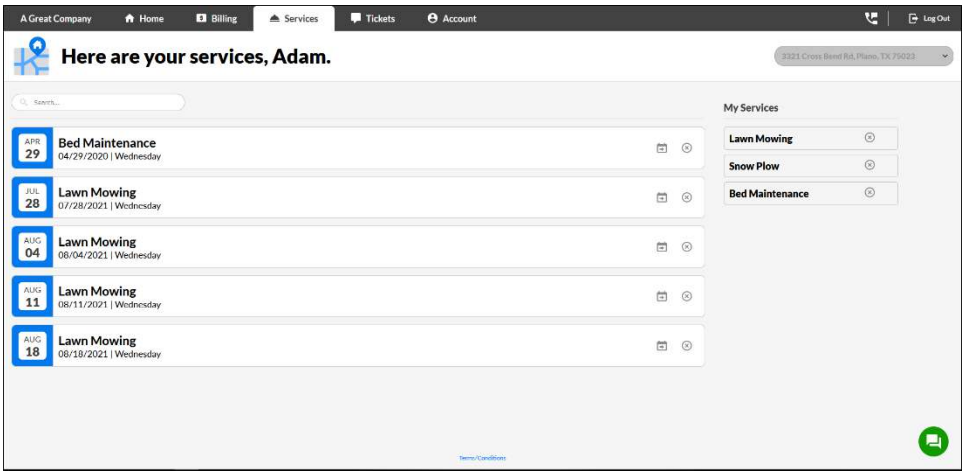
See All Jobs

The “Services” tab shows your currently scheduled jobs, past service history, and jobs that are on your Account but not yet scheduled:



The Services listed on the right have been added to your Account but are not yet scheduled. When a job is scheduled, it will move to the left side of the screen.

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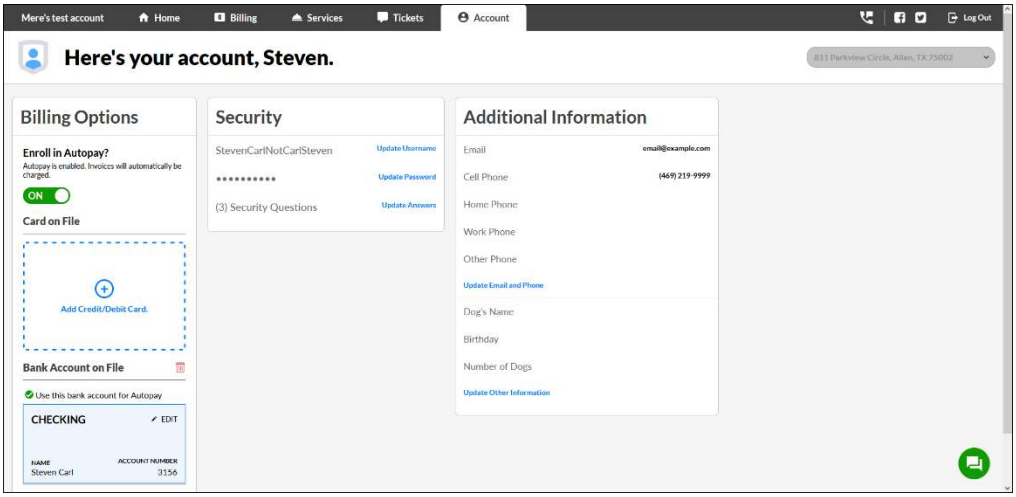
View Your Account Information

The “Account” tab shows current information about your account.



On this tab, you can:

- **Update your contact information** including username, password, security questions, email, and phone numbers.

The “Additional Information” panel will display the email and phone numbers on file for your account.

- **Change Custom Fields**, if any are provided.

See “Manage Your Account Information“ on page 17 for full instructions.

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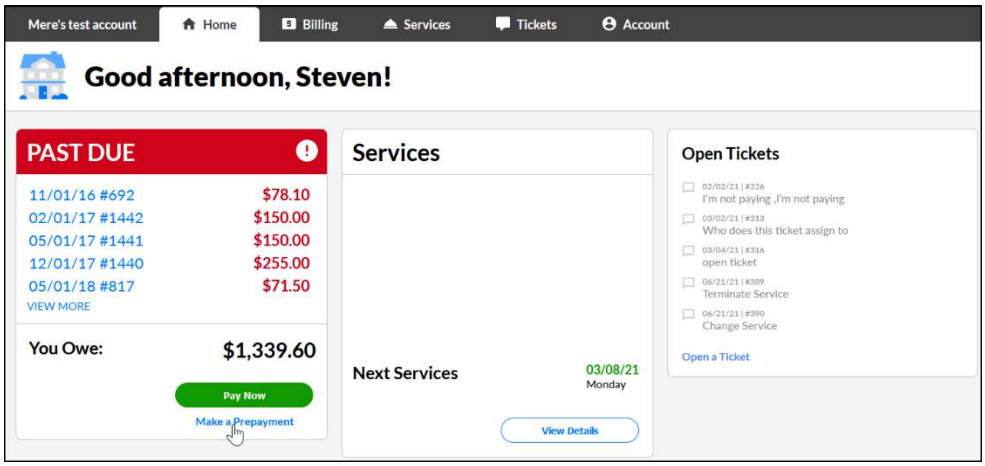
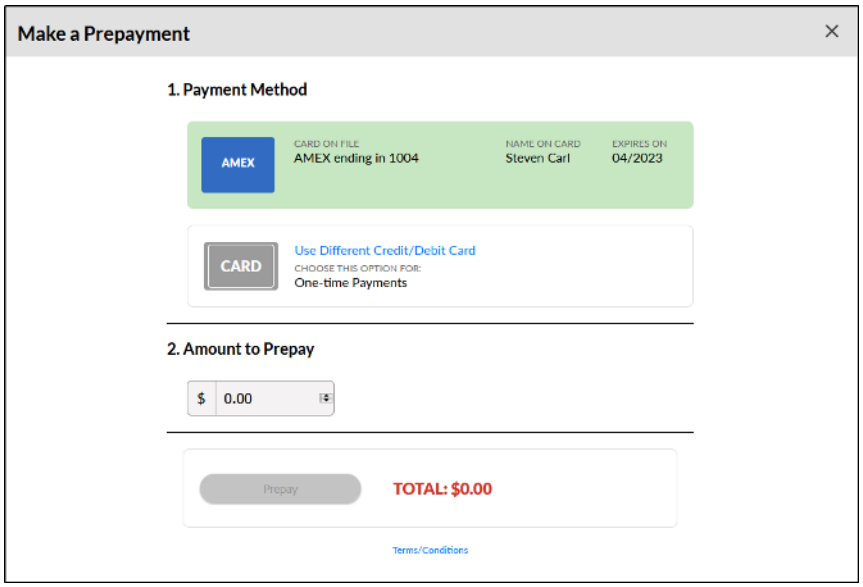
Make a Prepayment

If you are set up for them, you can make Prepayments, which are separate from any existing Invoice. When you make a Prepayment, it will be recorded on your Account. After you receive an Invoice, you can select the Services to which you want the Prepayment to apply. To make a Prepayment:

1. From the "Home" tab, click the blue **Make a Prepayment** link in the account balance panel:



2. By default, the credit card on file will be selected for use. Click **Use Different Credit/Debit Card** to enter a different card:



3. Enter the amount of the Prepayment in the **Amount to Prepay** field.
4. Click the green **Prepay** button.

A confirmation message will appear, and you can see it immediately in your list of transactions on the "Billing" tab.

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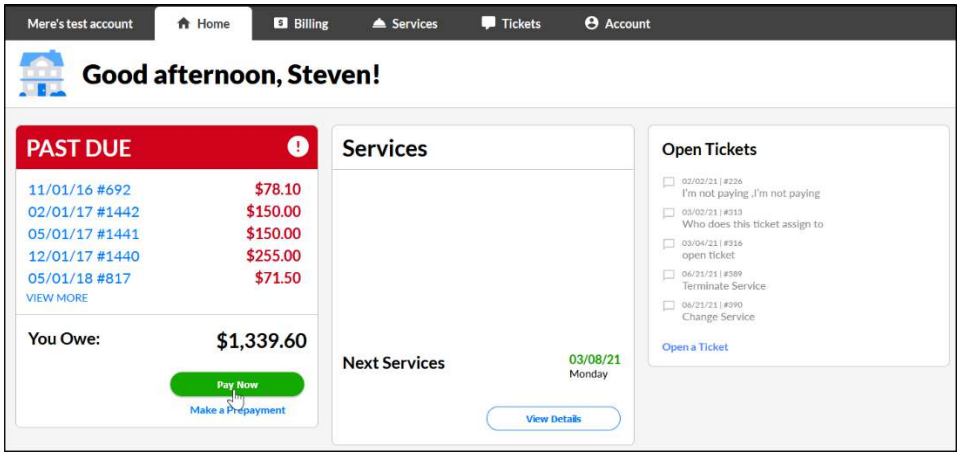
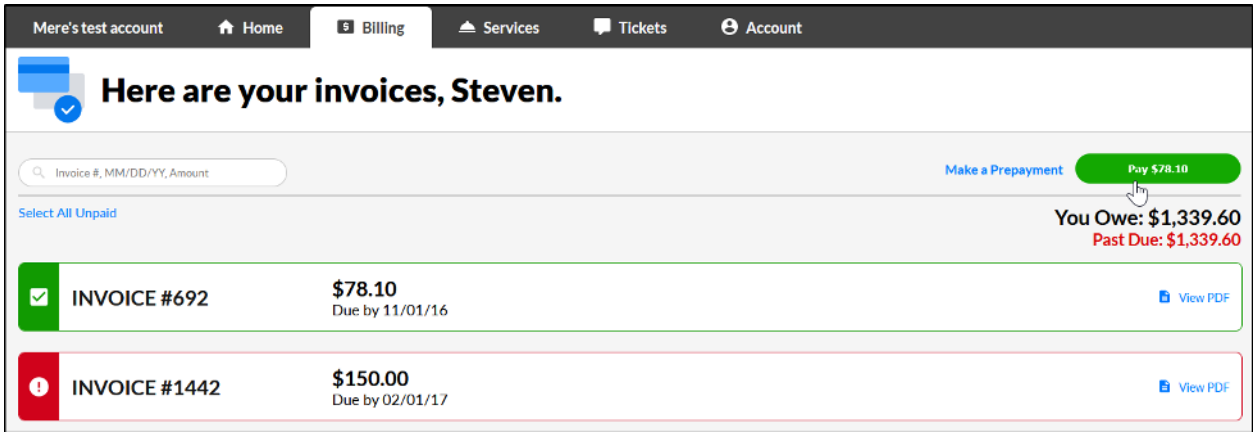
Pay an Open Invoice

To make a credit card Payment, follow these steps:

1. Log in to the Client Portal program.
2. From the Home Page, click **Pay Now**.



3. Check the boxes next to the Invoice(s) you want to pay or click **Select All Unpaid**.
4. Click the green **Pay** button.



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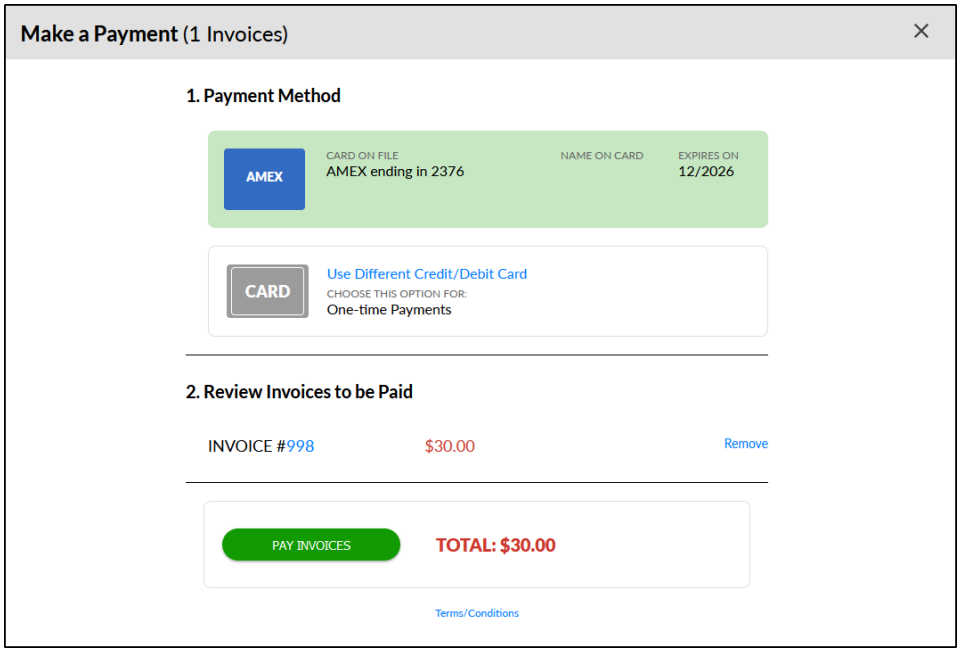
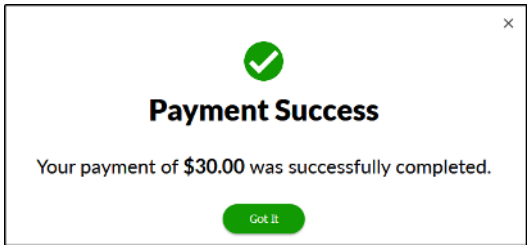
5. To use the credit card already on file, click **PAY INVOICES**. Otherwise, add the card information for the card you would like to use.



6. Click **Got it** to dismiss the confirmation message. You'll then be returned to the "Billing" tab.



To see the new Payment applied to the Account, refresh the "Billing" tab.

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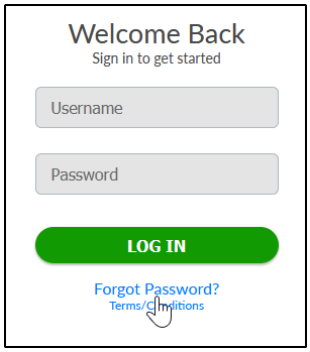
Reset a Password

If you forget your password (and don't we all?), you can reset it using your username and the answers to your security questions OR the email address for your account.

In the Client Portal, follow these steps.

Reset Password with Security Questions

1. Go to the Client Portal URL or the Client Portal app to log in.
2. Click the **Forgot Password** link below the green **Log In** button.



3. Enter your username and click **Next**.

4. Answer the security questions and click **Next**.

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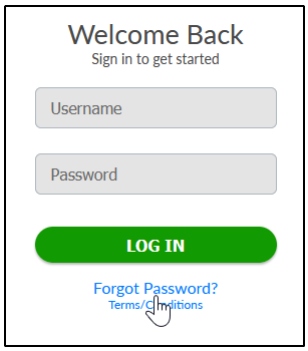
5. Enter a new password and click **Submit**:

Reset Password with an Email Address

1. Go to the Client Portal URL or the Client Portal app to log in.
2. Click the **Forgot Password** link below the green **Log In** button:



3. Enter your username and click **Next**.

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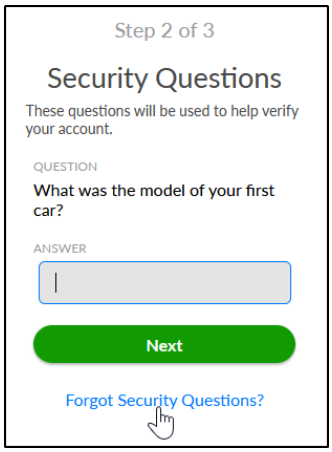
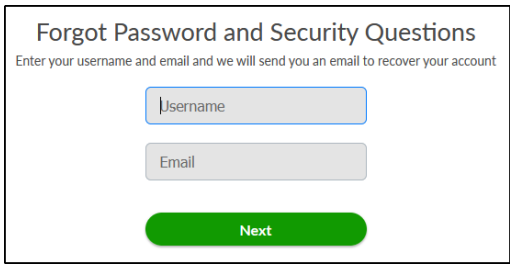
4. Click **Forgot Security Questions?** under the **Next** button:



5. Enter the username and email address for the Account and click **Next**.



6. An email with the subject line "Your portal password recovery request" will be sent to the email address you entered. Open the email and click the URL to continue resetting the password.
7. Enter your username and click **Next**.
8. Enter a new password and click **Submit**.

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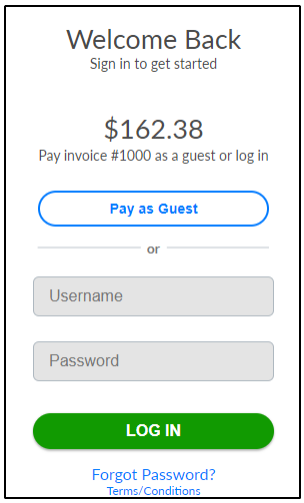
Use Guest Checkout to Make a Payment

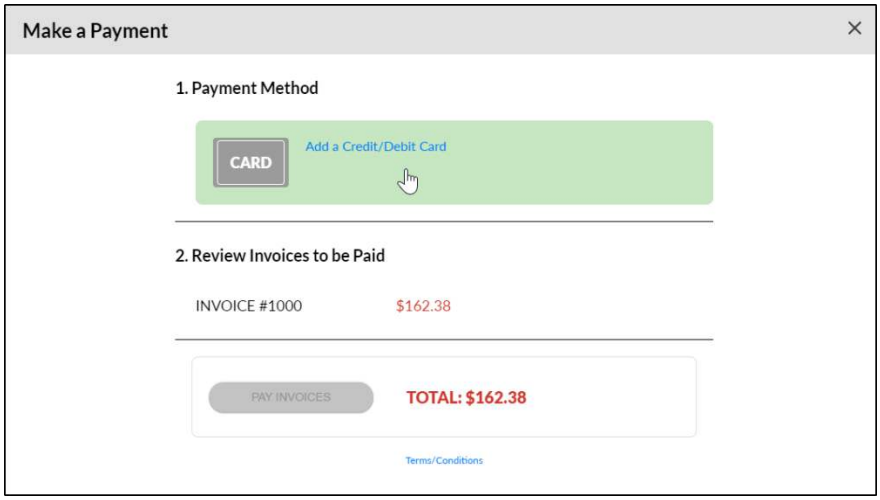
Making a Payment as a guest in the Client Portal will not save your credit card information. To save your card information, you need to create a user account as shown in “Set Up Your New Account“ on page 2.

To complete a transaction as a guest in the Client Portal, follow these steps:

1. When you receive an email from your service provide, click the **Pay Now** link.
2. On the Client Portal landing page, click **Pay as Guest**.



3. On the **Make a Payment** page, click **Add a Credit/Debit Card**.



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4. Fill out the credit card overlay and click **Save Card**.

5. Click **PAY INVOICES** to complete the transaction.

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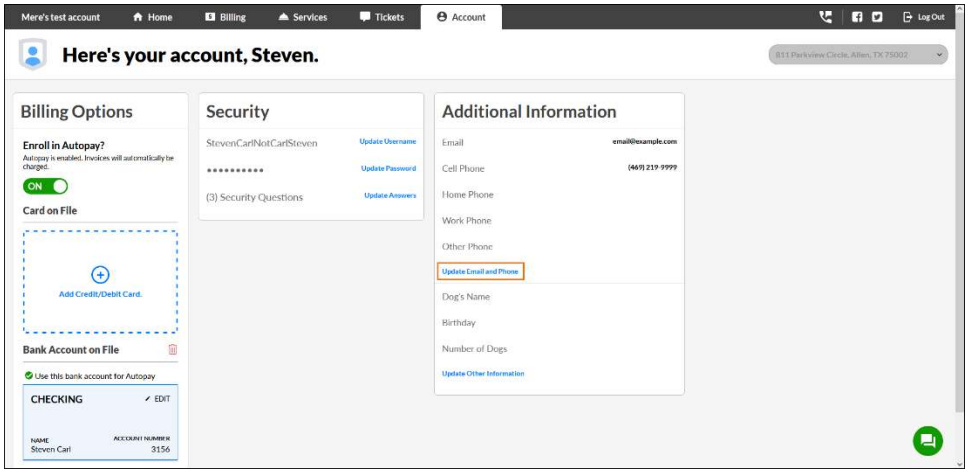
Manage Your Account Information

The “Account” tab is where you can see and update your Account information, including:

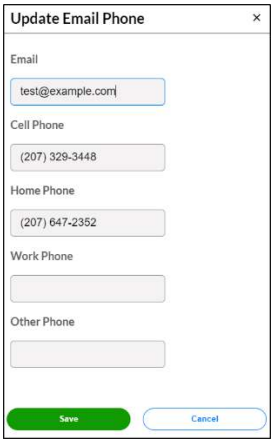
- **Contact information** like username, password, security questions, email, and phone numbers. The “Additional Information” panel shows the email and phone numbers on file for your account.
- **Custom Fields**, if any are provided.

To make changes, follow these steps:

1. Click the “Account” tab from the toolbar at the top of the screen.
2. On the **Additional Information** panel, click **Update Email Phone**.



3. On the overlay, update the email address, cell phone, home phone, work phone, or other phone number for your Account.
4. If needed, edit Custom Field values in the same way by clicking the **Update Other Information** link in the “Additional Information” panel.
5. Click **Save**.



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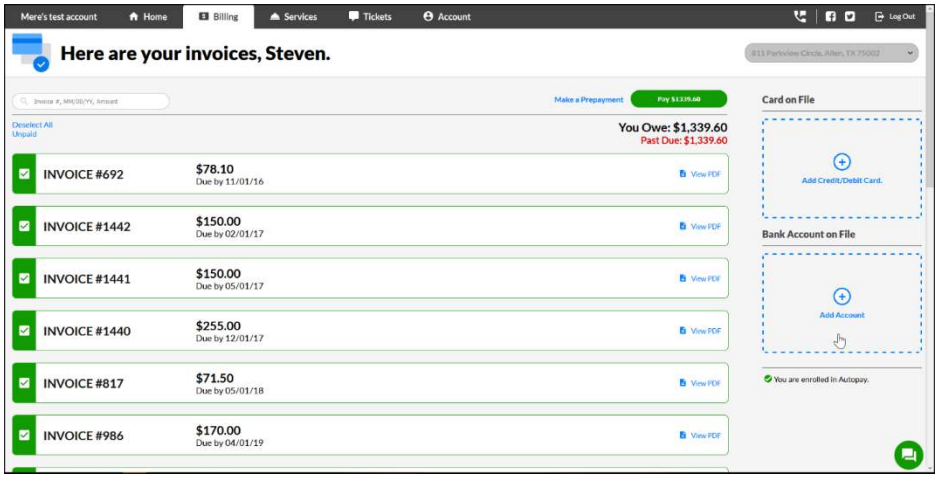
Set Up Payments with ACH

In order to pay with an ACH payment, which is a direct withdrawal from your bank account, you must add your own bank account information to ensure security of your personal information. Follow the steps in this section to set up and make ACH payments.

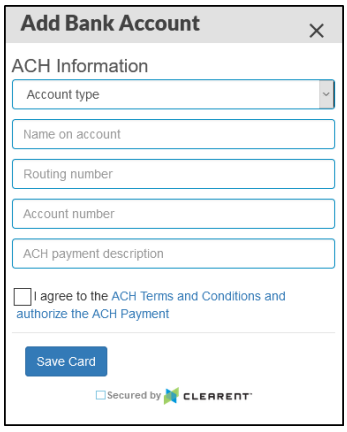
Enter Your Bank Account Information

The first step is to set up your Client Portal account with your bank information:

1. Click the “Billing” tab in the navigation bar at the top of the screen.
2. Click the **Add Account** link in the column on the right side of the screen:



3. Enter your personal information on the **Add Bank Account** overlay, including **Account type**, **Name on account**, **Routing number**, **Account number**, and **ACH payment description**.



4. Check the box to agree to the ACH Terms and Conditions.
5. Click **Save Card**.

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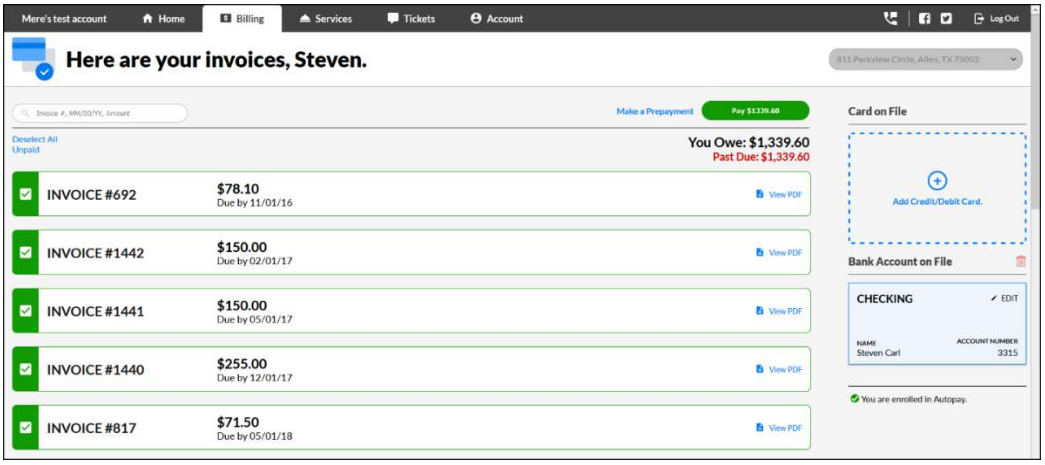
Remove or Update Bank Account Information

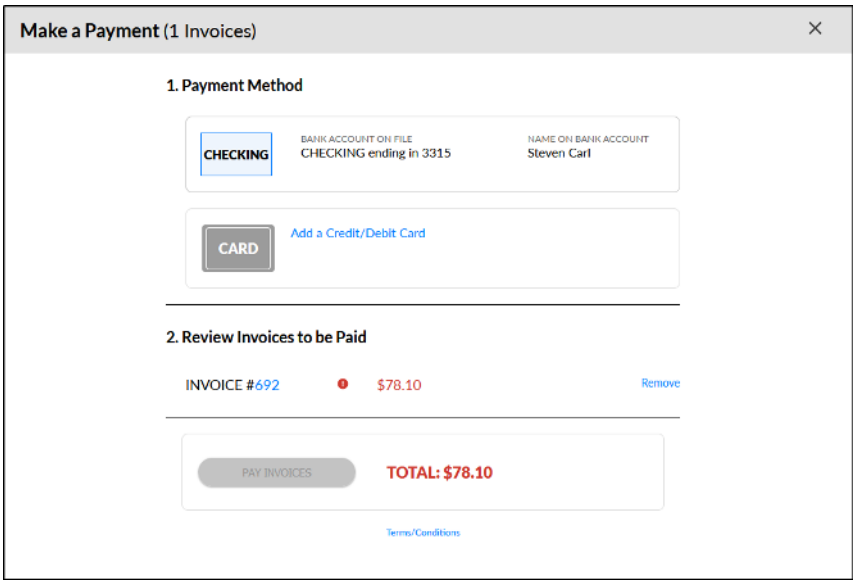
Once your bank account is saved, you'll see it listed on the right side of the "Billing" tab:



If you need to change or remove the bank account on file, just click the red trash can icon to remove the existing account.

Make an ACH Payment

When you start to make a Payment from anywhere in the Client Portal or Manage Service app, you will see the bank account listed as a saved payment method for easy checkout:



1. Select the Payment Method of **CHECKING**.
2. Click **PAY INVOICES**.

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The Manage Service App

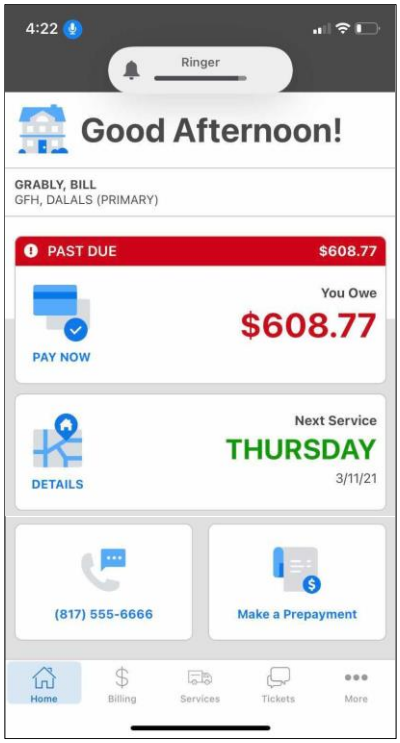
The SA Manage Service app lets you quickly and easily manage your Client Portal account from anywhere. You can pay off invoices, and if you have permissions, you can make prepayments. This section shows you how to download and use the app.

Download the App

1. In your app store, search “SA Manage Service” and download the app to your device of choice.
2. Use the same login credentials that you use for the Client Portal.
3. Optionally, enable Face ID, so you don’t have to use a username and password to log in every time.

View Your Balance and Upcoming Service in the App

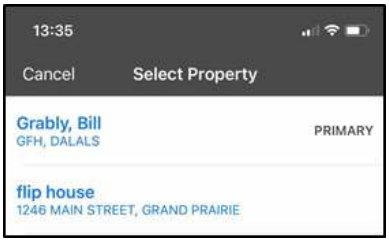
When you log into the app, the home screen shows basic information about your Account.



- The **outstanding Invoice** total appears in red.
- Click the **Next Service** card to see more details about your next service.
- Click the Phone icon at the bottom left to call your service provider.
- Click the **Make a Prepayment** button on the bottom right to make a Prepayment (if enabled).
- Click the buttons at the bottom to navigate to other tabs.

View Related Properties in the App

If you have related properties on your account, the address at the top will be the primary or Parent Account by default.



Tap the address to switch between properties.

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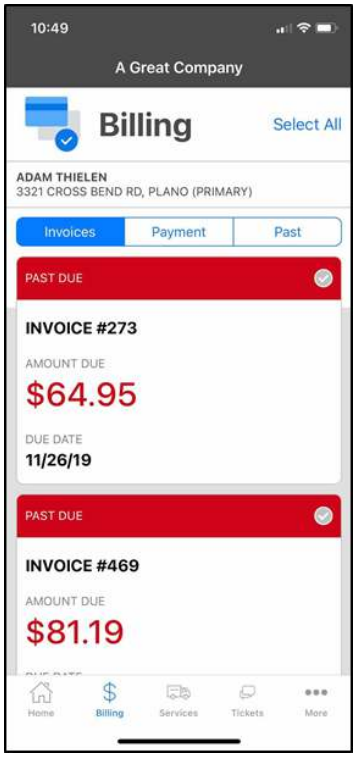
View and Pay Invoices in the App

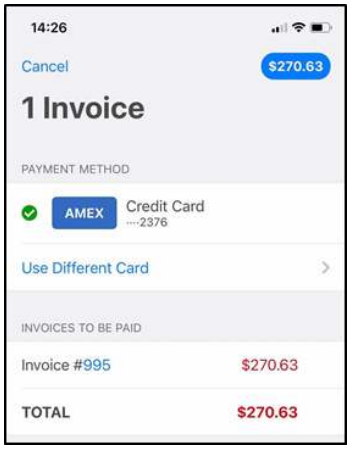


The “Billing” tab displays current, outstanding Invoices by default with an option to make a Prepayment at the bottom of the list (if enabled).

To pay an Invoice from this screen:

1. Tap the Invoice and then the blue **Pay** button at the bottom of the screen.

   This will take you to a screen to confirm the payment method:



2. Tap the blue amount in the upper right corner of the screen.
3. Tap **Pay** on the confirmation popup to complete the Payment.

The “Billing” tab has two additional tabs to explore: the “Payment” tab and “Past” tab.

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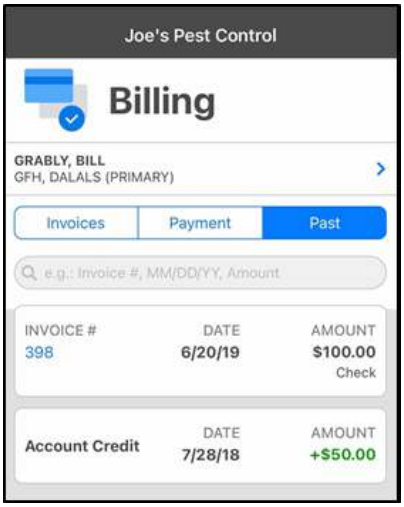
Change Your Credit Card Information in the App

- On the “Payment” tab, you can view or modify the credit card on your account.

See Past Transactions in the App

The “Past” tab shows past transactions including paid Invoices, Payments, and Credits.



Note: The Manage Service app does not support payments through Authorize.net or Payroc.

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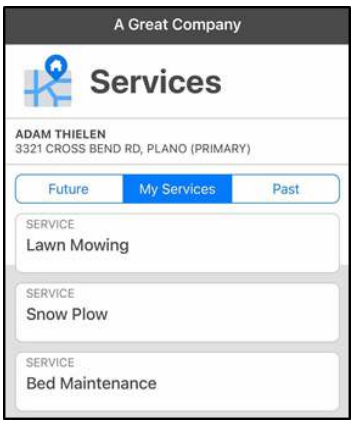
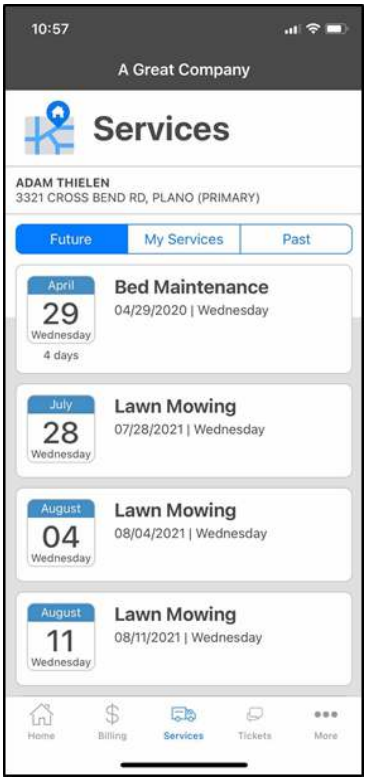
See Upcoming Services in the App

Click the tabs at the top of the table to see a list of all Services on the Account (by property):



- The “Future” tab shows your upcoming Services.
- The “Past” tab shows a list of Visits that have already been completed.



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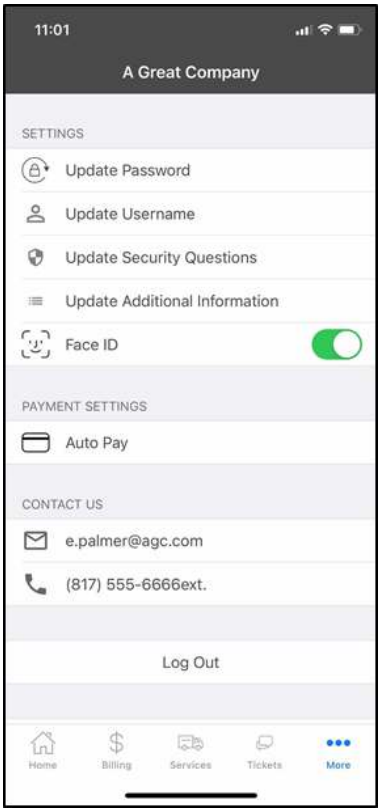
Manage Your Account in the App

The “More” tab is where you can manage your:

- Password
- Username
- Security questions
- Additional information
- Face ID settings

This screen might also show:

- Social media links for your Service Provider
- Contact information for your Service Provider



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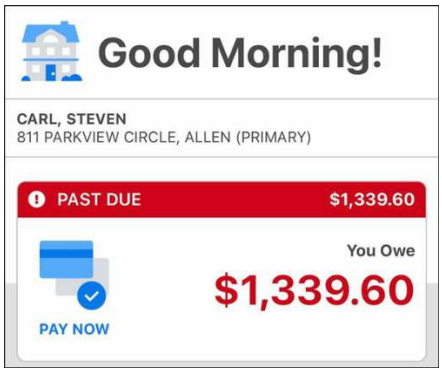
Make Payments in the App

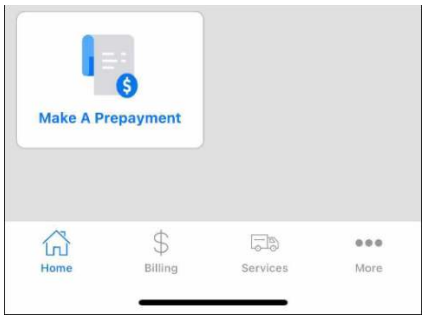
You can make payments from different places within the app.

1. On the “Home” tab, tap the **Past Due** card to pay outstanding Invoices:



OR

Scroll to the bottom of the same tab to make a Prepayment—a payment that will apply to future Invoices:



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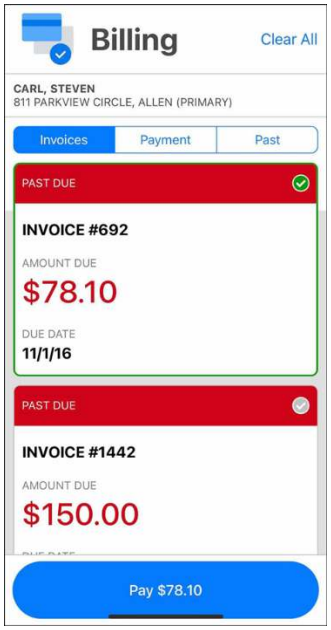
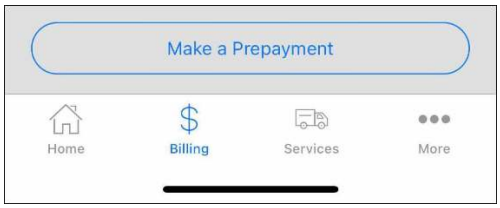
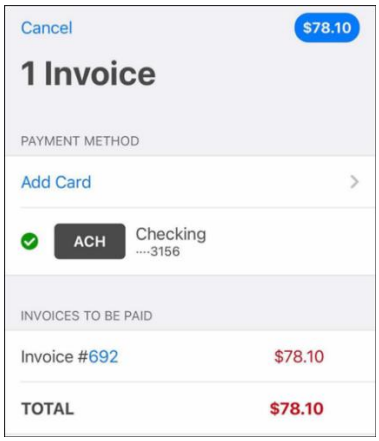
2. On the “Billing” tab, tap the Invoices you want to pay to activate the **Pay** button.



3. To make a Prepayment, tap **Make a Prepayment** at the bottom of the “Billing” tab:



4. After you initiate the payment, the payment screen looks like this:



Any credit cards or bank accounts on file will display, and the top one will be auto-selected. If there are no payment methods on file, you have the option to add your credit card information.

5. Tap the blue total in the top right corner to complete the payment.

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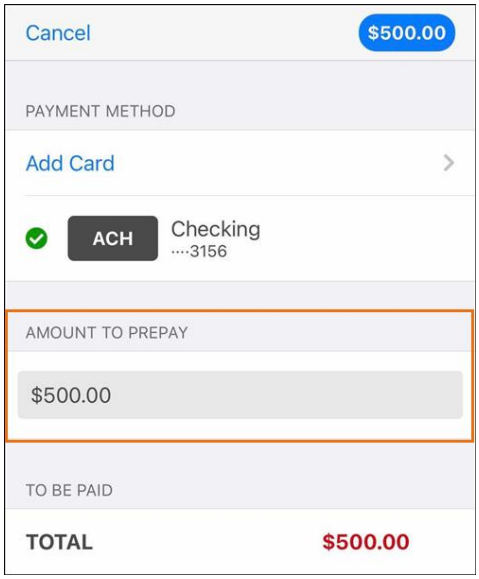
6. Prepayments have one additional step: enter the amount of the prepayment.



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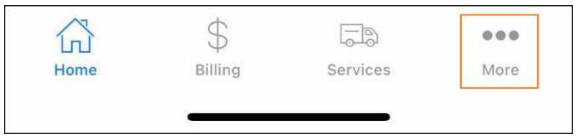
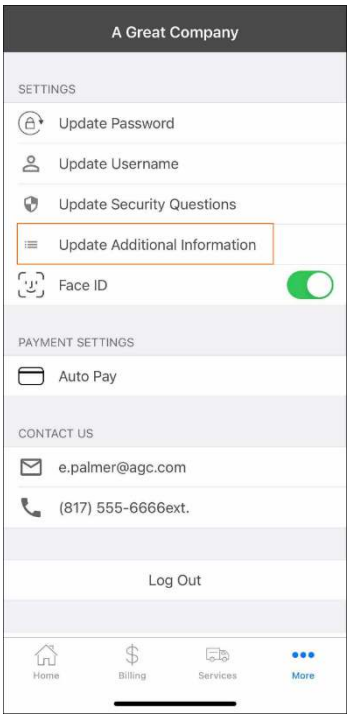
Update Your Account Information in the App

You can update some of your Account information in the app by following these steps.

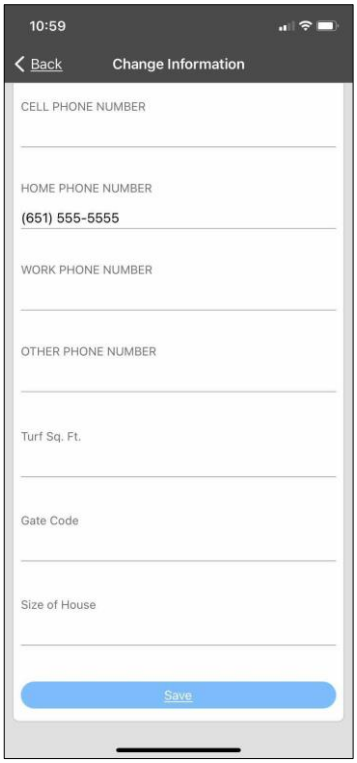
1. Tap the **More** button in the navigation bar at the bottom of the screen:



   This takes you to the **Settings** screen shown at right.



2. Tap **Update Additional Information**.
3. On the **Change Information** screen, you can edit your email address, phone numbers, and any Custom Fields that are enabled for you. Just tap a field and type in the update.
4. Scroll down and tap the blue **Save** button at the bottom of the screen:



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