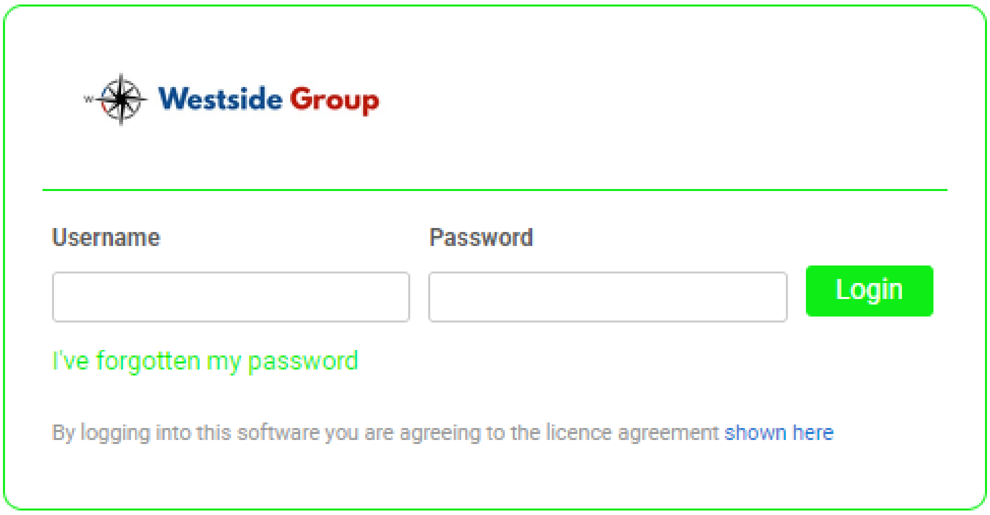
Client Management Portal: Guide for Customers

Why use the client management portal?

Our customer portal, run through our job management software simPRO, lets you easily and securely view your quotes, jobs, invoices and account statement; view and edit your details; and view and edit your site and contact details. If you have any questions, please let us know. If you are unable to find any of the pages mentioned below, this means that you have not been enabled to view them.

Log into the portal

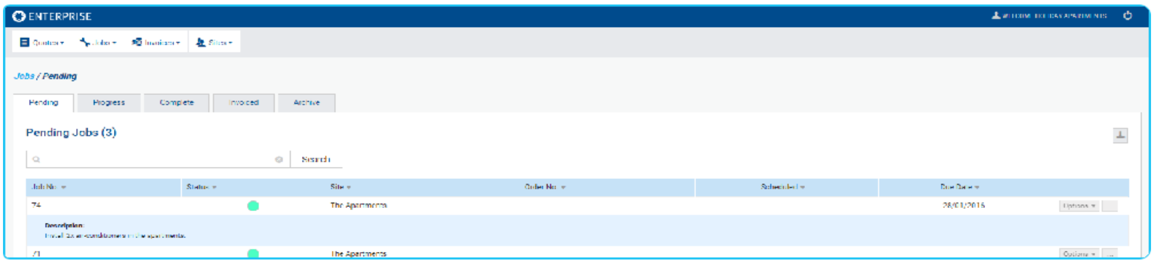
To log in, you will need your login details, including a URL, username and password. If you did not receive an email with this information, or would ever like us to re-send it, please let us know.



To log into the customer portal:

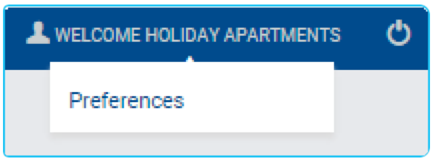
1. Click the customer portal URL we sent you. A page similar to the screenshot above will load.
2. Enter the **Username** and **Password** we sent you.
3. Click **Login**.

After you have logged in, you will be taken to the main screen of the portal, to the **Pending Jobs** page. Your name will appear in the top right corner, next to the **log out** icon; the main menu options display across the top of the screen.



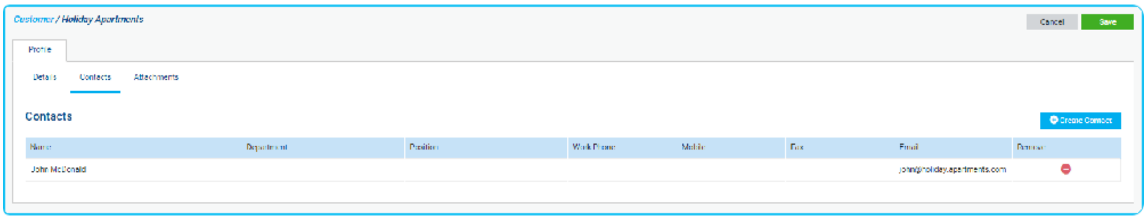
View and edit your preferences

You can view and edit your preferences, including your details, contacts, and any relevant attachments.



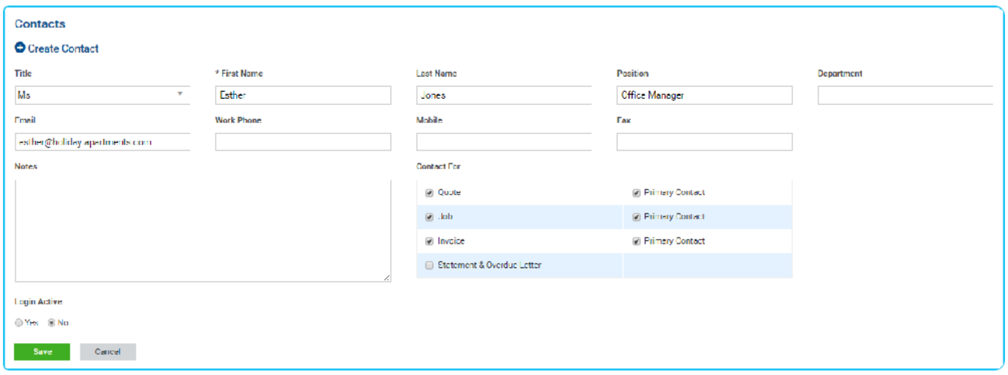
View and edit details

View and edit contacts



To view and edit your existing contacts:

1. Hover over your name in the top right corner (such as **Welcome Holiday Apartments**).
2. Click **Preferences**.
3. Under **Profile**, click the **Contacts** sub-tab.
4. Click the name of the desired contact.
5. Make changes as required.
6. Click **Save**.
7. Click **Save** again.



To create a new contact:

1. Hover over your name in the top right corner (such as **Welcome Holiday Apartments**).

2. Click **Preferences**.
3. Under **Profile**, click the **Contacts** sub-tab.
4. Click **Create Contact**.
5. Enter a **First Name** and other desired details.
6. Select whether you want this person to be the contact for a **Quote**, **Job**, **Invoice** or **Statement & Overdue Letter**, and whether they are the **Primary Contact**.
7. Under **Login Active**, select **Yes** if you wish to give this contact their own customer portal login details. Learn more.
8. Click **Save**.

You new contact will be created in our system.

Create login details for another employee

You can create additional login details for your customer portal when editing or creating a contact.

To create login details for another employee:

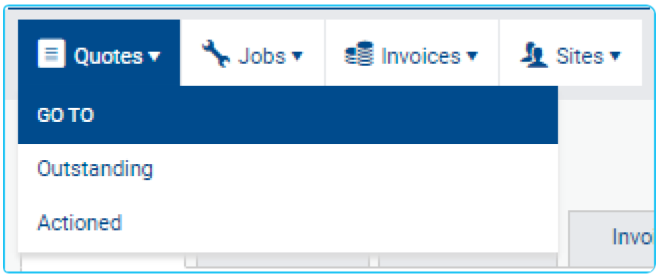
1. Hover over your name in the top right corner and click **Preferences**.
2. Under **Profile**, click the **Contacts** sub-tab.
3. Open the contact you wish to create login details for, or create a new contact.
4. Under **Login Active**, select **Yes**.
5. Enter a new **Username** and **Password** for the employee.
6. Under **Page Access**, select the pages you wish the employee to have access to through the portal.
7. Under **Site Access**, click an available site to move it to the **Assigned Sites** . The employee will be able to access information for **Assigned Sites** only.
8. Click **Save**.

The employee will then be able to log in to the customer portal, using the original URL you received along with their new username and password. You can repeat this process for as many employees as necessary.

View attachments

View quotes

View the status and details of your quotes through the portal.



To view quotes:

1. Hover over **Quotes** at the top of the page.
2. Click **Outstanding** or **Actioned**, depending on the quotes you wish to view.
3. View quote details as desired. To find a specific quote, enter a quote number in the search bar and click **Search**.

To switch between **Outstanding** and **Actioned** quotes, click the appropriate sub-tab.

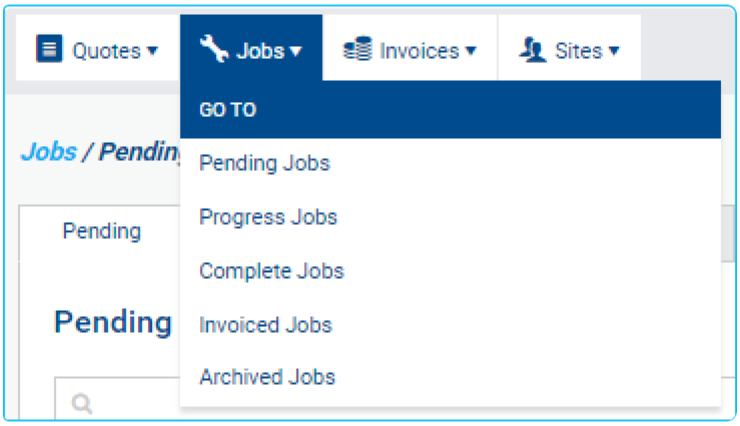
To print a quote, click **Options > Print Quote**.

To view or upload attachments, click **Options > Attachments**.

To download a spreadsheet of quote details, click the **download** button in the top right corner, then click **CSV**.

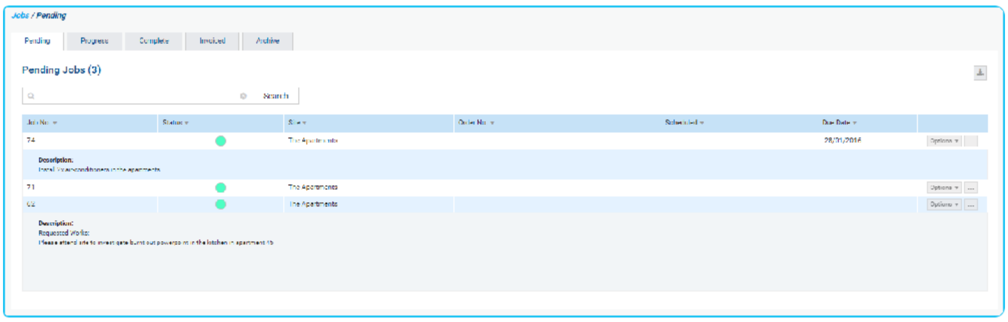
View jobs

View the status and details of your jobs through the portal.



To view jobs:

1. Hover over **Jobs** at the top of the page.
2. Click the stage you wish to view, such as **Pending** or **Complete**.
3. View job details as desired. To find a specific job, enter a job number in the search bar and click **Search**.



To switch between **Pending**, **Progress**, **Complete**, **Invoiced** and **Archive** jobs, click the appropriate sub-tab.

To print a job, click **Options > Print Job**.

To view or upload attachments, click **Options > Attachments**.

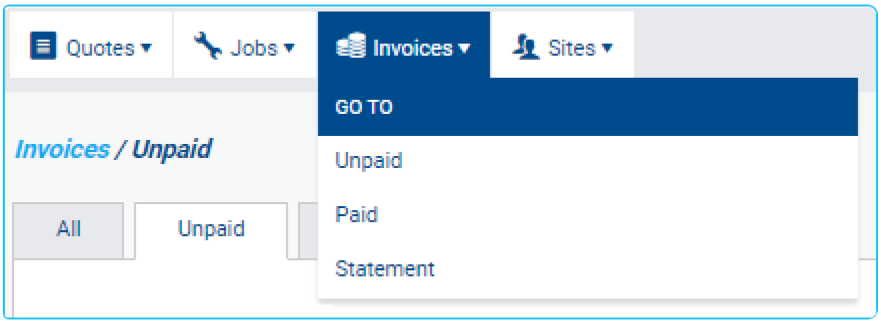
To view associated invoices, click the **...** button to the right of **Options** for details.

To download a spreadsheet of job details, click the **download** button in the top right corner, then click **CSV**.

View invoices

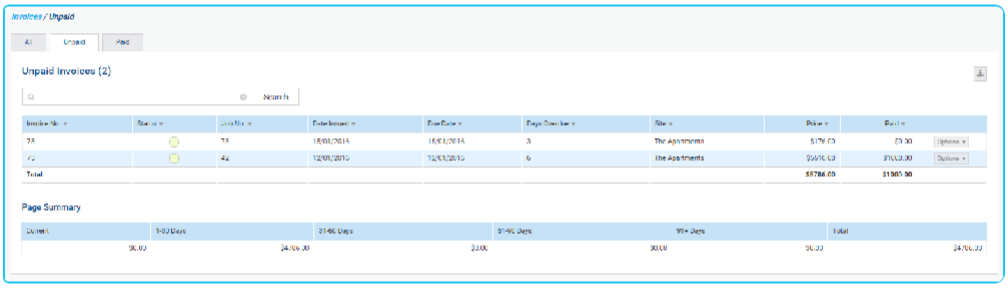
View invoices through the portal

View invoices



To view invoices:

1. Hover over **Invoices** at the top of the page.
2. Click **Unpaid** or **Paid**, depending on the invoices you wish to view.
3. View invoice details as desired. To find a specific invoice, enter an invoice or job number in the search bar and click **Search**.



To switch between **All**, **Unpaid** and **Paid** invoices, click the appropriate sub-tab.

To print an invoice, click **Options > Print Invoice**.

To download a spreadsheet of invoice details, click the **download** button in the top right corner, then click **CSV**.

The **Page Summary** displays a summary of balance outstanding.

View account statement

View sites.

Check quote status

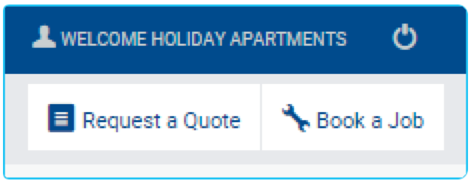
You can easily check quotes through your customer portal. You can then check the quote's status whenever you wish.

Check quote status

Book a job and check job status

You can easily book a job through your customer portal, sending information directly to our system for us to review and schedule. You can then check the job's status whenever you wish.

Book a job



To book a job through the customer portal:

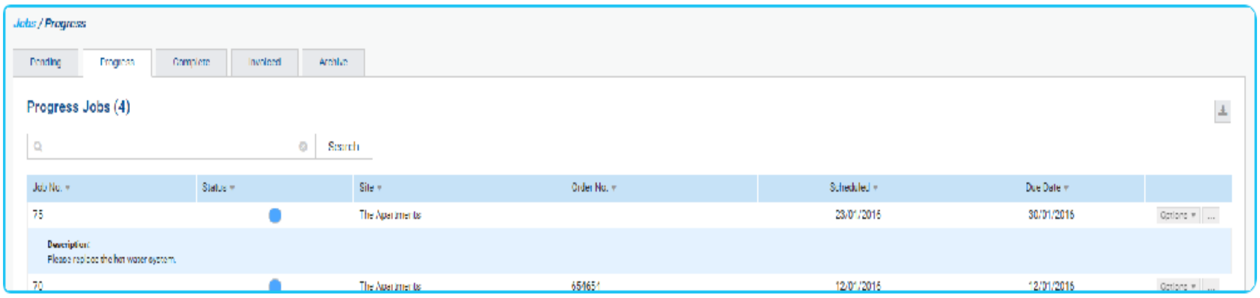
1. Click **Book a Job** at the top right corner of the screen.
2. Select a **Site** for the job, or click **Create New** to create a new site, then return to this screen.
3. Select a **Customer Contact**.
4. If desired, enter an **Order Number** and select a **Preferred Date** using the date picker.
5. In the **Description** field, enter as much detail as you can about the job.
6. Under **Attachments**, drag and drop attachments or click **Browse** to upload attachments, such as a photo of the job site, as desired.
7. When finished, click **Submit**.

Your job will appear in our system for review and scheduling.

Add attachments to an existing job by clicking **Options > Attachments** on the desired job.

Check job status

After you have booked a job, go to **Jobs > Pending** to view it. Once we have scheduled the job, it will appear under Jobs > Progress Jobs instead, and will displayed the **Scheduled** date. If you hover over its **Status**, you will see it has changed from 'Job : New Service' to 'Job : In Progress'. After the job is complete it will appear under **Jobs > Complete**; after it has been invoiced it will appear under **Jobs > Invoiced**; and after the invoice is paid it will be listed under **Jobs > Archive**.



ABN 63 105 857 323
Westside Services (SA) Pty. Ltd.
11–13 West Thebarton Road, Thebarton South Australia 5031
(08) 8451 2150
(08) 8451 2101
www.westsidegroup.com.au