

CUSTOMER PORTAL GUIDE

2019 Version 1.1

FCF SUPPORT OFFICE



'Act as an individual; respond as a team'

TABLE OF CONTENTS

Log into the portal	3
View and edit your preferences	4
View and edit details	4
View and edit contacts	5
Create login details for another employee	6
View attachments	7
View quotes	7
View jobs	8
View and pay invoices	9
View invoices	9
Pay invoices	10
View account statement	11
View, edit, and create sites	12
View and edit sites	12
Create a new site	13
View tasks	13
Request quotes and check quote status	14
Request a quote	14
Check quote status	15
Book a job and check job status	16
Book a job	16
Check job status	17
View assets	18

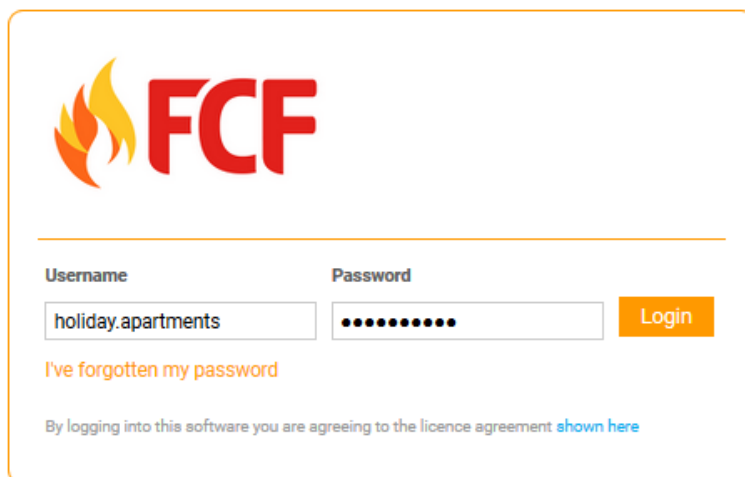
'Act as an individual; respond as a team'

Why use the Customer 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.



The screenshot shows the login interface for the FCF customer portal. At the top left is the FCF logo, which consists of a stylized flame icon in orange and red, followed by the letters 'FCF' in a bold, red, sans-serif font. Below the logo is a horizontal line. Underneath the line are two input fields: 'Username' and 'Password'. The 'Username' field contains the text 'holiday.apartments'. The 'Password' field contains a series of black dots. To the right of the password field is an orange 'Login' button. Below the input fields is a link that says 'I've forgotten my password' in orange text. At the bottom of the form, there is a small line of text: 'By logging into this software you are agreeing to the licence agreement [shown here](#)'.

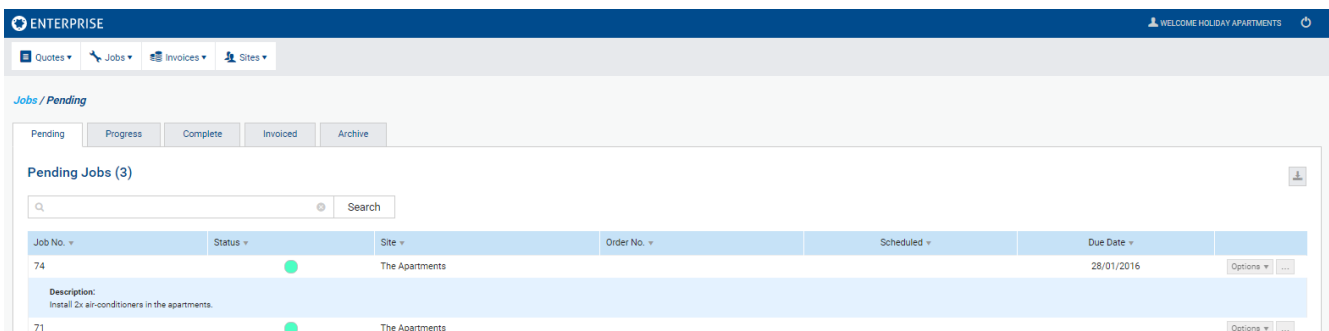
Enter the **Username** and **Password** you were sent.

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 **logout** icon; the main menu options display across the top of the screen.

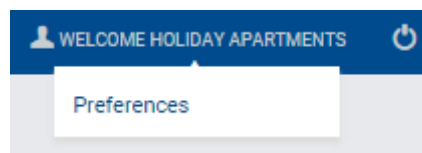
'Act as an individual; respond as a team'



After you log in, this page will display.

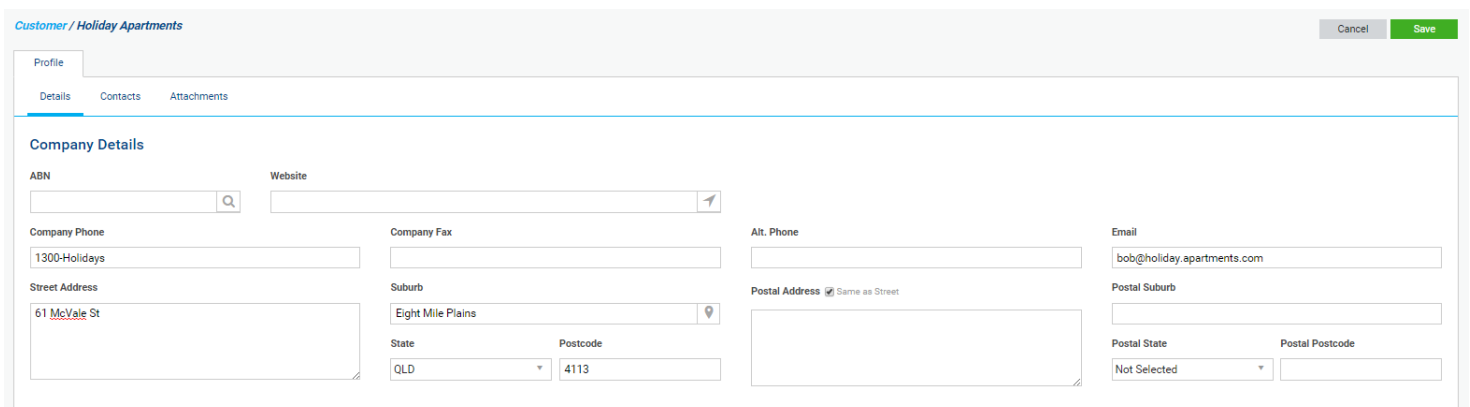
View and edit your preferences

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



Hover over your name and click **Preferences**.

View and edit details



View and edit your details on this tab, then click **Save**.

To view and edit your details:

1. Hover over your name in the top right corner (such as **Welcome Holiday Apartments**).
2. Click **Preferences**.
3. Under **Profile > Details**, view and edit details as desired.
4. Click **Save**.

'Act as an individual; respond as a team'

View and edit contacts

Customer / Holiday Apartments Cancel Save

Profile + Create Contact

Details **Contacts** Attachments

Name	Department	Position	Work Phone	Mobile	Fax	Email	Remove
John McDonald						john@holiday.apartments.com	-

Click a contact to edit it. Click the red **delete** icon to remove a contact.

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.

Enter new contact details then click **Save**.

Contacts

+ Create Contact

Title: Ms * First Name: Esther Last Name: Jones Position: Office Manager Department:

Email: esther@holiday.apartments.com Work Phone: Mobile: Fax:

Notes:

Login Active: Yes No

Save Cancel

Contact For

<input checked="" type="checkbox"/> Quote	<input checked="" type="checkbox"/> Primary Contact
<input checked="" type="checkbox"/> Job	<input checked="" type="checkbox"/> Primary Contact
<input checked="" type="checkbox"/> Invoice	<input checked="" type="checkbox"/> Primary Contact
<input type="checkbox"/> Statement & Overdue Letter	

'Act as an individual; respond as a team'

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.
8. Click **Save**.

Your 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:

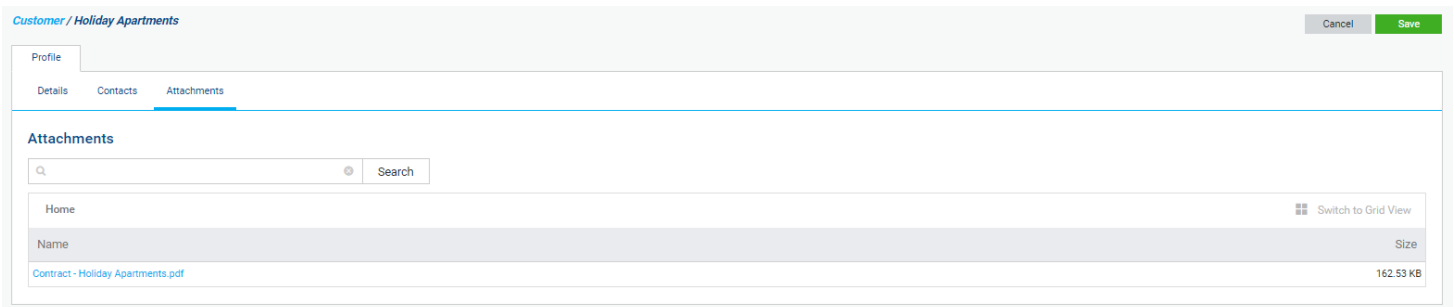
1. Hover over your name in the top right corner and click **Preferences**.
2. Under **Profile**, click the **Contacts** sub-tab.
3. Open the contact you wish to create login details for, or create a new contact.
4. Under **Login Active**, select **Yes**.
5. Enter a new **Username** and **Password** for 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** field. 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.

'Act as an individual; respond as a team'

View attachments

You can view any relevant attachments that have been associated with you in our system, such as contracts.



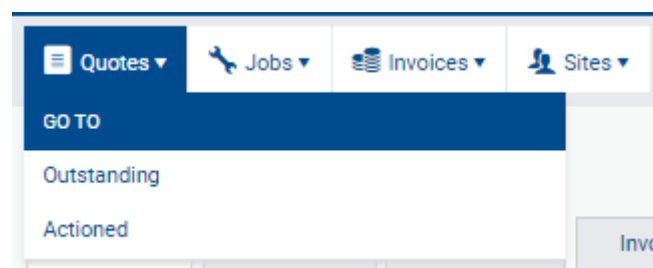
View attachments associated with you in our system.

To view attachments:

1. Hover over your name in the top right corner (such as **Welcome Holiday Apartments**).
2. Click **Preferences**.
3. Under **Profile**, click the **Attachments** sub-tab.
4. Click an attachment to open it. To find a specific quote, enter the attachment name in the **search bar** and click **Search**.

View quotes

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



Hover over **Quotes**, then click **Outstanding** or **Actioned**.

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**.

'Act as an individual; respond as a team'

Quotes / Outstanding

Outstanding | Actioned

Outstanding (1) ↓

Search

Quote No. ▾	Site ▾	Create Date ▾	Expiry Date ▾	Cost ▾
18	The Apartments	18/01/2016	17/02/2016	\$0.00

Description:
Please provide a quote to install a new split-system air-conditioner.

View **Outstanding** quote details. Click the **Actioned** tab to switch to actioned quotes.

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

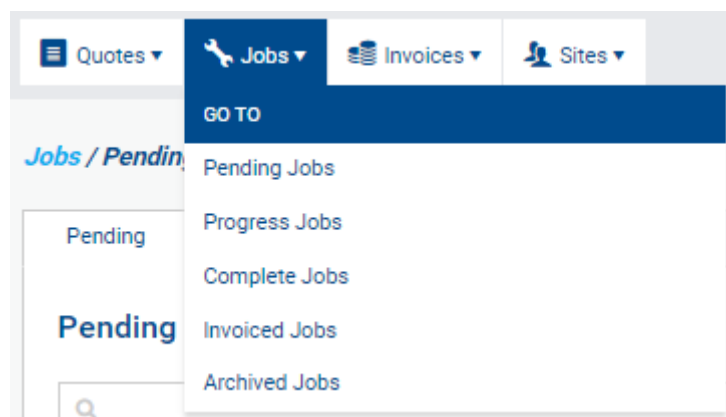
To print a quote, click **Options > Print Quote**.

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.



Hover over **Jobs**, then click the job stage you wish to view.

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**.

'Act as an individual; respond as a team'

Jobs / Pending

Pending Progress Complete Invoiced Archive

Pending Jobs (3)

Search

Job No. ▾	Status ▾	Site ▾	Order No. ▾	Scheduled ▾	Due Date ▾	
74	●	The Apartments			28/01/2016	Options ▾ ...
Description: Install 2x air-conditioners in the apartments.						
71	●	The Apartments				Options ▾ ...
62	●	The Apartments				Options ▾ ...
Description: Requested Works: Please attend site to investigate burnt out powerpoint in the kitchen in apartment 45						

Download

View job details. Click another tab to switch between job stage.

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**.

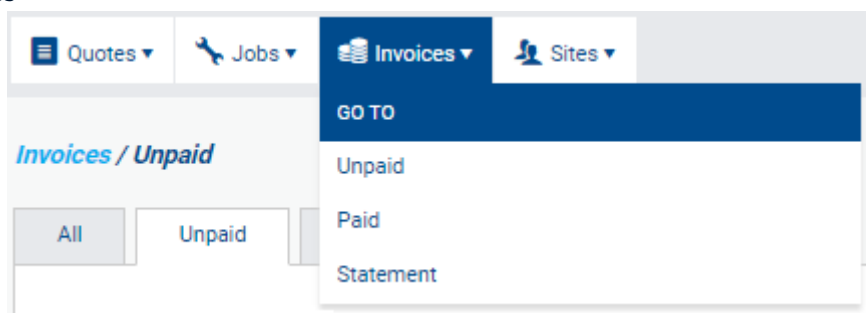
To view associated invoices, click the ... button to the right of **Options** for details.

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

View and pay invoices

View invoices through the portal and pay them using a credit card.

View invoices



Hover over **Invoices** and click **Unpaid** or **Paid**.

'Act as an individual; respond as a team'

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**.

Invoices / Unpaid

All Unpaid Paid

Unpaid Invoices (2)

Search

Invoice No. ▾	Status ▾	Job No. ▾	Date Issued ▾	Due Date ▾	Days Overdue ▾	Site ▾	Price ▾	Paid ▾	Options ▾
78	●	73	15/01/2016	15/01/2016	3	The Apartments	\$176.00	\$0.00	Options ▾
73	●	42	12/01/2016	12/01/2016	6	The Apartments	\$5610.00	\$1000.00	Options ▾
Total							\$5786.00	\$1000.00	

Page Summary

Current	1-30 Days	31-60 Days	61-90 Days	91+ Days	Total
\$0.00	\$4786.00	\$0.00	\$0.00	\$0.00	\$4786.00

View invoice details. Click another tab to view different invoice types.

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.

Pay invoices

Unpaid Invoices (2)

Search

Invoice No. ▾	Status ▾	Job No. ▾	Date Issued ▾	Due Date ▾	Days Overdue ▾	Site ▾	Price ▾	Paid ▾	Options ▾
72122	<input type="radio"/>	8810	16/02/2016	16/02/2016	-	31 Mckechnie Drive Eight Mile Plains	\$44.00	\$0.00	Options ▾
72113	●	8793	11/02/2016	11/02/2016	5	31 Mckechnie Drive Eight Mile Plains	\$161.26	\$0.00	Print Invoice Pay Online
Total							\$205.26	\$0.00	

Click **Options > Pay Online**.

'Act as an individual; respond as a team'

To pay invoices:

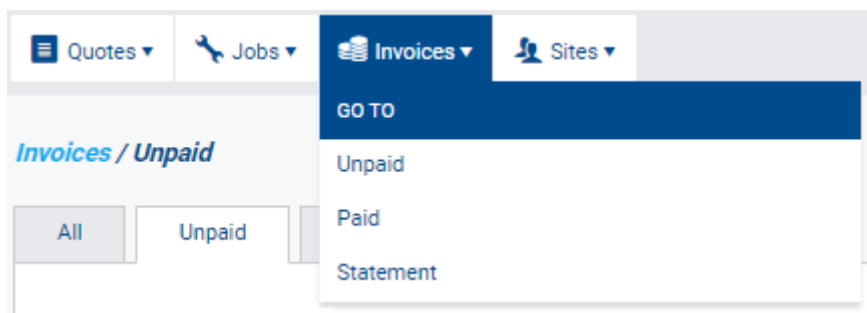
1. Hover over **Invoices** at the top of the page.
2. Click **Unpaid**.
3. Locate the desired invoice in the list.
4. Click **Options > Pay Online**, or select multiple invoices and click **Pay Online** at the bottom of the screen.
5. In the **Payments** pop-up window, enter your credit card details, including **Name on Card, Expiry, Card Number** and **CVV**.
6. Click **Pay**.
7. Click **Continue** to confirm the payment.
8. If the payment is successful, a confirmation will appear, along with a receipt number you may wish to record. Click **Close**.

Alternatively, you can also pay invoices through the **Statements** page.

To pay invoices through the **Statements** page:

1. Hover over **Invoices** at the top of the page.
2. Click **Statement**.
3. Under **Invoices**, select the desired invoice or click **Select All**.
4. Click **Pay Online**.
5. In the **Payments** pop-up window, enter your credit card details, including **Name on Card, Expiry, Card Number** and **CVV**.
6. Click **Pay**.
7. Click **Continue** to confirm the payment.
8. If the payment is successful, a confirmation will appear, along with a receipt number you may wish to record. Click **Close**.

View account statement



Hover over **Invoices** and click **Statement**.

To view your account statement:

1. Hover over **Invoices** at the top of the page.
2. Click **Statement**.
3. View statement details as required.

'Act as an individual; respond as a team'

Customers / Smith, Josephine / Statement Cancel

Statement

Statement - Smith, Josephine

Filter By

Date Range

Summary Print Statement Download

Current	1-30 Days	31-60 Days	61-90 Days	91+ Days	Total	Retentions Held
\$0.00	\$161.26	\$0.00	\$0.00	\$0.00	\$0.00	\$161.26

Invoices (1)

Date	Description	Order No.	Debit	Credit	Balance
11/02/2016	Invoice No. 72113 - Claim No. 1			\$161.26	\$0.00
Total					\$161.26

Select All [Pay Online](#)

View your statement. Click the **calendar** icon to filter by **Date Range**.

To narrow results to a specific timeframe, use the **Date Range** date picker and click **Search**.

To print your statement, click **Print Statement** at the bottom of the page.

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

View, edit, and create sites

You can view and edit the details of your sites, and create new sites.

Quotes Jobs Invoices **Sites**

Customer / Holiday Apartments

GO TO CREATE NEW

Sites + Site

Hover over **Sites**, then click **Sites** or **Create New Site**.

View and edit sites

Sites

Sites (1) Download

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Search

Site	Site Address	Site Suburb	Site State	Site Postcode	Options
The Apartments	31 McKechnie Drive	Eight Mile Plains	QLD	4113	Options

'Act as an individual; respond as a team'

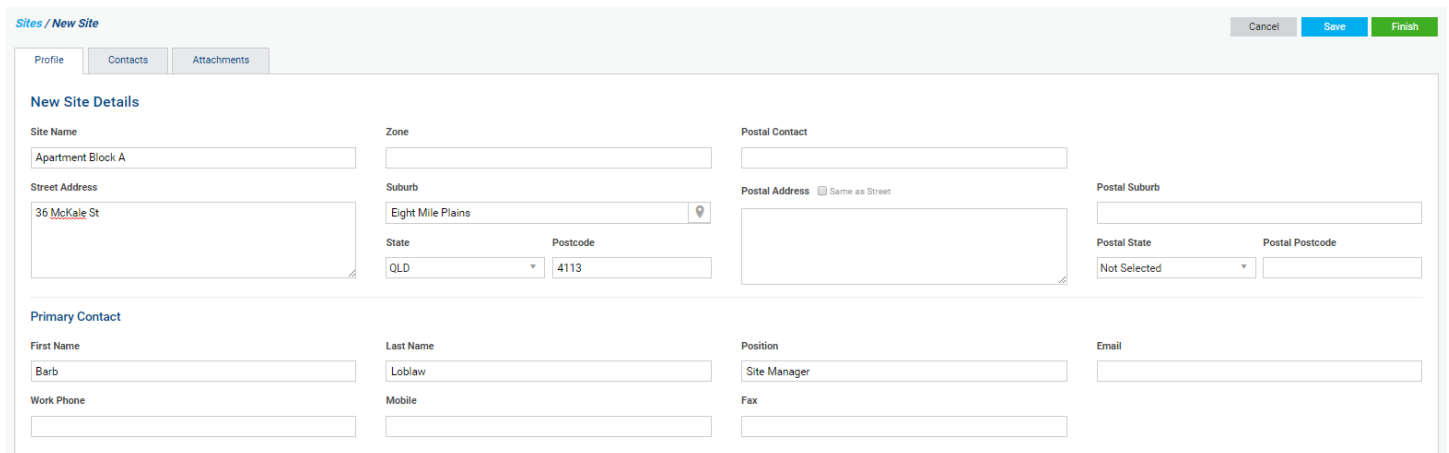
Click a site to view and edit its details.

To view and edit sites:

1. Hover over **Sites** at the top of the page.
2. Click **Sites**.
3. Click the desired site. To find a specific site, enter a site name in the **search bar** and click **Search**.
4. Edit the **Site Details** as desired and click **Save**.
5. View and edit contacts and view attachments as desired through the **Contacts** and **Attachments** tabs.
6. Click **Finish**.

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

Create a new site



Enter **New Site Details** and click **Finish**.

To create a new site:

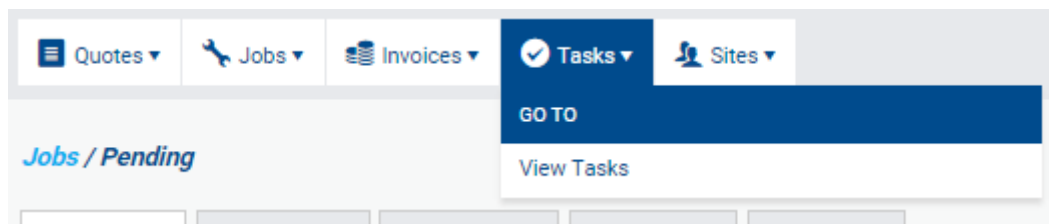
1. Hover over **Sites** at the top of the page.
2. Click **Create New Site**.
3. Enter **New Site Details** as required and click **Save**.
4. If you wish to add site contacts, click the **Contacts** tab and click **Create Contact**. When you have finished creating the contact, click **Save**.
5. Click **Finish**.

Your new site will be created in our system.

View tasks

You can use the customer portal to view the details and status of tasks created as part of the work we are doing with you.

‘Act as an individual; respond as a team’



Hover over **Tasks** and click **View Tasks**.

To view tasks:

1. Hover over **Tasks** at the top of the page.
2. Click **View Tasks**.
3. View task details as required.

Tasks

Tasks (1)

Search

Order	Task No.	Subject	Status	Job ID	Start Date	Due Date	Estimated Hrs	Site	Completed Date
0	15	Organise council approval	Pending	74		2016-02-29	3	The Apartments	

Download icon

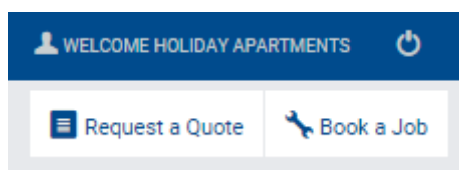
View task details as required.

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

Request quotes and check quote status

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

Request a quote



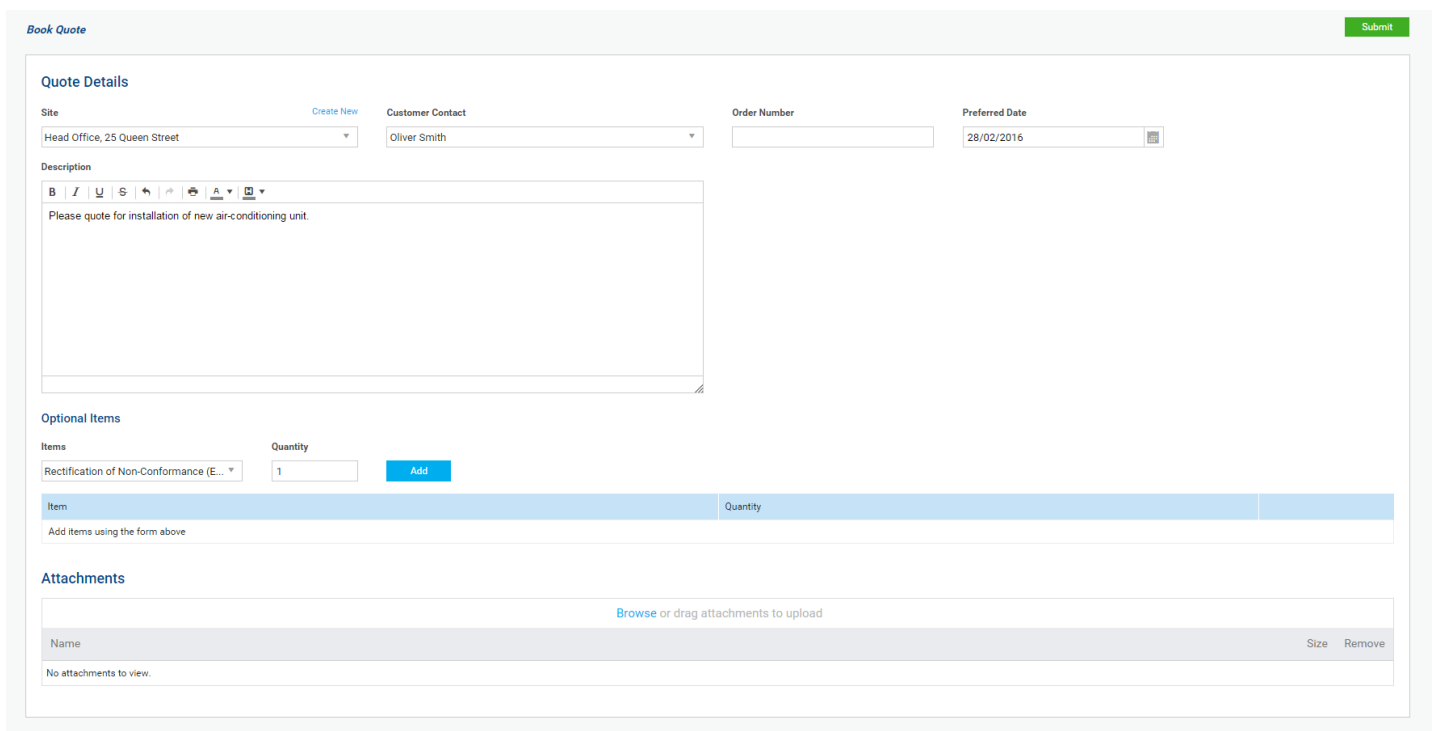
Click **Request a Quote**.

'Act as an individual; respond as a team'

To request a quote through the customer portal:

1. Click **Request a Quote** at the top right corner of the screen.
2. Select a **Site** for the quote, 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 work you would like us to provide a quote for.
6. Under **Attachments**, drag and drop attachments or click **Browse** to upload attachments, such as a photo of the work you would like to have quoted, as desired.
7. When finished, click **Submit**.

Your quote will appear in our system for review.



The screenshot shows the 'Book Quote' form with the following sections:

- Quote Details:** Includes fields for Site (Head Office, 25 Queen Street), Customer Contact (Oliver Smith), Order Number, and Preferred Date (28/02/2016). There is a 'Create New' link for the Site field.
- Description:** A rich text editor with a toolbar and a text area containing 'Please quote for installation of new air-conditioning unit.'
- Optional Items:** A table with columns for 'Items' and 'Quantity'. One item is listed: 'Rectification of Non-Conformance (E...)' with a quantity of '1'. There is an 'Add' button.
- Attachments:** A section with a 'Browse or drag attachments to upload' link and a table for viewing attachments. The table has columns for 'Name', 'Size', and 'Remove'. It currently shows 'No attachments to view.'

Enter **Quote Details** and click **Submit**.

When requesting a quote, if the **Optional Items** field appears at the bottom of the screen, select an item from the **Items** drop-down list, adjust **Quantity** and click **Add** as required.

Select an item from the drop-down list, enter a **Quantity**, and click **Add**.

Check quote status

After you have requested a quote, go to **Quotes > Outstanding** to view it. Once we have reviewed and actioned the quote, it will appear under **Quotes > Actioned** instead, with the estimated **Cost** included.

'Act as an individual; respond as a team'

Quotes / Actioned

Outstanding | Actioned

Actioned (1)

Q Search

Quote No. ▾	Site ▾	Create Date ▾	Expiry Date ▾	Cost ▾	Options ▾
15	The Apartments	12/01/2016	11/02/2016	\$80.00	Options ▾

Description:
Please do the quote.

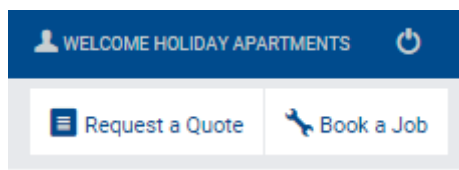
After we have reviewed and actioned your quote it will appear under **Quotes > Actioned**.

Once a quote has been approved, you can add attachments if desired by clicking **Options > Attachments**.

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



Click **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.

Enter **Job Details** and click **Submit**.

'Act as an individual; respond as a team'

Book Job Submit

Job Details

Site: [Create New](#) Customer Contact: Order Number: Preferred Date:

Description:

Optional Items

Items: Quantity: [Add](#)

Item	Quantity
Add items using the form above	

Attachments

[Browse](#) or drag attachments to upload

Name	Size	Remove
No attachments to view.		

When booking the job, if the **Optional Items** field appears at the bottom of the screen, select an item from the **Items** drop-down list, adjust **Quantity** and click **Add** as required.

Select an item from the drop-down list, enter a **Quantity**, and click **Add**.

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**.

Jobs / Progress

Pending Progress Complete Invoiced Archive

Progress Jobs (4)

Search

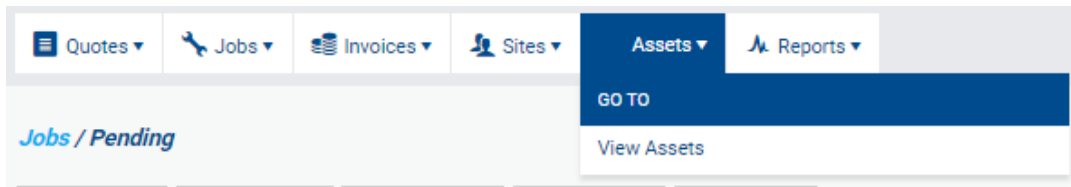
Job No. ▾	Status ▾	Site ▾	Order No. ▾	Scheduled ▾	Due Date ▾	Options ▾
75	●	The Apartments		23/01/2016	30/01/2016	Options ▾
Description: Please replace the hot water system.						
70	●	The Apartments	654654	12/01/2016	12/01/2016	Options ▾

After we have reviewed and scheduled your job, it will appear under **Jobs > Progress Jobs**.

'Act as an individual; respond as a team'

View assets

View detailed information about your assets, including service and transfer history. Assets are grouped by site and asset type.



Hover over **Assets** and click **View Assets**.

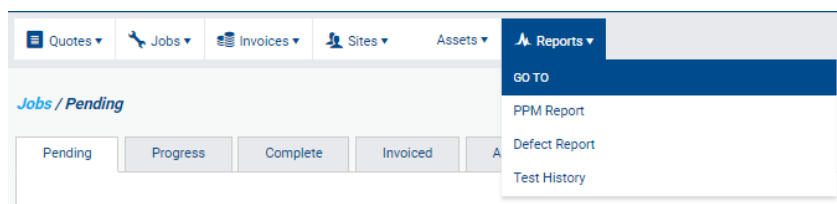
To view assets:

1. Hover over **Assets** at the top of the page.
2. Click **View Assets**.
3. Click the **Site** you wish to view assets for.
4. Assets are grouped by type. Scroll to find the desired asset, or enter an asset number into the **search bar** and click **Search**.
5. Click the desired asset. It will open in a pop-up window.
6. View the **Service History** details as required.
7. Click the **Transfer History** tab to view transfer information as required.
8. When you have finished, close the window by clicking the **X** in the top right corner.

To download a list of asset details, click the **download** icon in the top right and click **CSV**.

View reports

Find out more detailed information about your assets by viewing reports. Reports include the **Programmed Preventative Maintenance Report**, the **Defect Report**, and the **Test History Report**.



Hover over **Reports** and click the desired report.

To view reports:

1. Hover over **Reports** at the top of the page.
2. Click the report you wish to view.
3. Filter results by selecting options from the drop-down lists.
4. Click **Search**.
5. View report results as required.

To download report details, click the **download** icon in the top right corner of the report.