Customer Portal Views

Last Modified on 07/16/2024 9:01 am EDT

Pathway: *Setup > Account > Account Class; Customer Portal*

Customer Portal Home Page

The view presented to customers upon logging into their portal account is determined by the account class. Within the account classes setup, system users (with permission 23) can choose the portal home page view customers associated with a specific account class will see from the Customer Portal tab. This article provides examples of each view and what can be expected when a site is inactive.

Permissions

The following permission must be enabled for a system user to change the 'Customer Portal Home Page' in the Account Class Setup.

Permission ID	Permission Name
23	Setup / Account

Inactive Site Access

When a site is marked as 'Inactive,' customers may be granted restricted access to view the site's service history if "Service History Only" is selected in the 'Enable Viewing Inactive Site' setting for the account class. Additionally, if the 'Enable Report Access' option is set to "Yes," in the account class, customers will also have access to their reports and documents.

Customer Portal Homepages

The account class provides the following homepages. Expand each section to view examples.

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41898001 Navusoft - Demo Post Oak Blvd, Houston TX   ▼

TEST MESSAGE TESTING

($ 599.04)   TOTAL DUE

[$ 599.04]   PAST DUE

DAY Portal Div Past Due Text

$ ▸ **Make a Payment**

Last Payment: 10-12-2023 - Bank Account 72873590_ $ 50.00

▤ ▸ **Invoice History**

⟳ ▸ **Manage Auto Pay**

$ ▸ **Wallet**

▤ ▸ **Reports / Documents**

RECENT SERVICES	ID		SERVICE
🖨 Wed Feb 28, 2...	7462298 (Completed)		30 Yard Open Top Se...
🖨 Fri Jan 12, 2024	7261044 (Completed)	🗑	2 Yard Trash Service
🖨 Wed Nov 8, 20...	7039366 (Completed)		30 Yard Compactor S...
🖨 Wed Oct 11, 2...	6805040 (Completed)		30 Yard Compactor S...
🖨 Fri Apr 21, 2023	5915744 (Credit Hold)		30 Yard Compactor S...

VIEW PREVIOUS AND FUTURE SERVICES

ℹ The following descriptions apply to common fields and action buttons that are displayed across many of the views.

Field/Button	Description
Select Account	Drop down to select the account sites are linked to.
Select Service Location	Drop down to select and view the details of a specific site.
Total Due	Displays the total amount that is due for the selected site.
Past Due	Displays the total amount that is past due for the selected site.
Make a Payment	Option to make a payment using a credit card or bank account.
Invoice History	Opens the Invoice and Payment History screen for customers to review and print their invoices.
Manage Auto Pay	Provides customers the ability to manage their auto pay. This includes the ability to turn off automatic payments, or change the payment method.
Payment Methods	Provides customers the ability to add and save payment methods to the system. This is separate from auto pay and if the payment method should be used for automatic payments, once added it will be available as a payment method selection option in the Manage Auto Pay screen.
Requests	Option for customers to submit a request that will populate in *Account > Account Request Management.* Requests created in the portal are assigned to the account manager assigned to the account.
View All Requests	Displays a history of all requests created in the portal.
Current Services	Displays a list of active services the customer is currently receiving.

Recent Services	Displays a list of recent services. The option to display work order photos and attachments is also available but must be enabled in Setup > Account > Account Class > Customer Portal.

Standard - Homepage

The Standard homepage offers essential account management features and service details. From this interface, customers can perform various actions, such as making payments, accessing invoice history, managing automatic payment arrangements, reviewing recent and ongoing services, and submitting portal requests.

AR Only - Homepage

The AR Only homepage exclusively shows items related to the customer's accounts receivable. This includes viewing invoices and balances, making payments, and managing payment methods and auto-pay.

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<u>**VIEW PREVIOUS AND FUTURE SERVICES**</u>

Mail Back - Homepage

The Mail Back homepage features a pie graph displaying recycling rates for all sites or the current site being viewed. Additionally, customers have access to the Recycling Composition Report from this portal view by selecting the PDF icon associated with the graph.

21638 BIG STATE ▼

TEST MESSAGE TESTING

$ 0.00 — **TOTAL DUE**

$ 0.00 — **PAST DUE**

Last Payment: 12-11-2023 - Visa
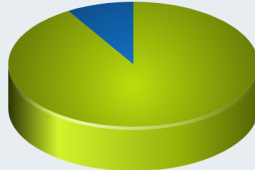123456_DEMO_AUTH $ 731.40

Invoice History

Automatic payment activated - 15th of each month (Visa 1111
Exp: 10/33)

Reports / Documents (3)

21638001 BIG STATE 12911 Farm to Market 1960 Rd W, Houston TX ▼

RECENT SERVICES	ID	SERVICE
Mon Jul 8, 2024	7904637	4 Yard Trash Service
Mon Mar 25, …	7403228 (Completed - Recycling Contaminated)	4 Yard Trash Service
Mon Feb 26, 2…	7259940 (Not Serviced - Bin Blocked)	4 Yard Trash Service
Mon Feb 5, 2024	7142482 (Not Serviced - Bin Overloaded)	4 Yard Trash Service
Mon Aug 14, …	6303866 (Completed)	4 Yard Trash Service

VIEW PREVIOUS AND FUTURE SERVICES

DIVERSION / LEED YTD

● Recycled Waste   ● Solid Waste (Non-Recyclable)

Recycled Waste	91.3%	789.00 tons
Solid Waste (Non-Recyclable)	8.7%	75.39 tons

VIEW DETAILS

2024 ▼   All Sites ▼

You saved
0 tree(s)

No data to display.

Vendor - Homepage

The Vendor homepage applies to vendor accounts. This view **excludes** AR information (except for the option to view invoice history), but does include additional features such as viewing Open Orders and Scheduled Services.

| SELECT ACCOUNT | 1 of 8 | SELECT SERVICE LOCATION | 1 of 1 |

7777000 LOCAL BUSINESS 71717 LIBERTY ▼   7777000 LOCAL BUSINESS 71717 LIBERTY 2320 N MAIN ST, LIBERTY TX ▼

$ 0.00   TOTAL DUE TO VENDOR

| Invoice History | Open Orders (0) | Bid Opportunities (0) | Scheduled Services |

⊕

DATE	ID	ACCOUNT ID	AMOUNT	ADDRESS	STATUS	ADJUSTMENT	BALANCE	NOTES

Service Map And Request - Home Page

The Service Map and Request homepage features an AR section for the account and includes additional features to view the service map, requests, and disposal tickets.

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| Accounts Receivable | Service Map | Service Exceptions | Requests | Disposal Tickets |

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REQUESTS   CLICK HERE TO SUBMIT ONLINE REQUEST

VIEW ALL REQUESTS

Descriptions

Action Button	Description

Accounts Receivable	Default display showing the action buttons associated with accounts receivable.
Service Map	Displays the service map of the service locations that belong to the account.
Requests	The customer service screen displays a history of requests submitted from the portal, as well as account requests created in Navusoft.
Disposal Tickets	Provides a history of disposal ticket records that can be searched using a date range.

MRF/Recycling - Home Page

The MRF/Recyclying homepage currently displays the AR section, Current Services and Recent Services sections.

Calendar View - Home Page

The Calendar View homepage includes the addition of an Activity Calendar. Items displayed in the calendar, such as services and requests, are live links that allow customers to select and review its details further.

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REQUESTS CLICK HERE TO SUBMIT ONLINE REQUEST

VIEW ALL REQUESTS

CURRENT SERVICES   FREQUENCY   NEXT SCHEDULED

PRINT CALENDAR

ACTIVITY CALENDAR ▤   ◀ July, 2024 📅 ▶

MON	TUE	WED	THU	FRI	SAT/SUN
Jul 1 1, FL_SERVICE…	Jul 2	Jul 3	Jul 4	Jul 5	Jul 6/30
Jul 8 1, FL_SERVICE…	Jul 9	Jul 10	Jul 11	Jul 12	Jul 13/7
Jul 15 1, FL_SERVICE…	Jul 16	Jul 17	Jul 18	Jul 19	Jul 20/14
Jul 22 1, FL_SERVICE…	Jul 23	Jul 24	Jul 25	Jul 26	Jul 27/21
Jul 29 1, FL_SERVICE…	Jul 30	Jul 31	Aug 1	Aug 2	Aug 3/28

Brokered Account - Home Page

The Brokered Account View homepage provides many of the same items as the other views, but it also includes a Diversion / LEED YTD section with a pie graph.

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