## **Customer Portal User Guide**



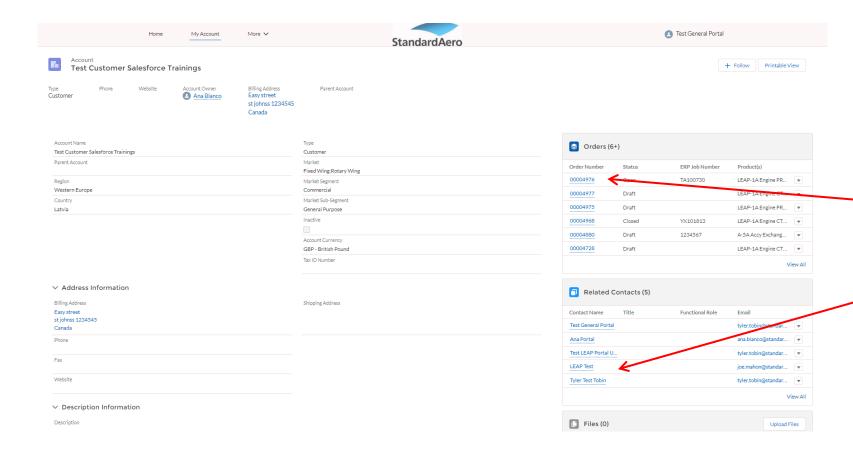
The 'My Account' tile menu option will bring you to your account detail page

To approve/reject squawks please click the more button then click on the "My Orders & Squawks" button from the dropdown.

To view the 'Portal PDF Guide' please click the more button then click the 'Portal Guide' button.

Note: "My Account" and "My Order & Squawks" are also available via the navigation tabs at the top of the screen.

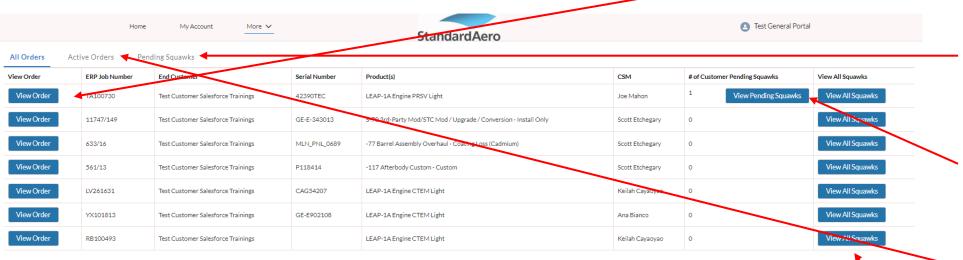
Note: To view our company website, privacy policy or terms and conditions please click on the links at the bottom of the home page.



This is the 'My Account' page. This page shows the detail page for your account along with all the field values.

You can click on any order in the related lists to be brought to that Order's detail page.

You can also view contacts and files that are related to your account.



From the 'My Orders & Squawks' page you'll be able to view the Order's details by clicking the 'View Order' button.

Visit the "Pending Squawks" tab to view Squawks requiring review, across ALL of your orders.

If you have any pending Squawks for that order the 'View Pending Squawks' button will appear.

Use the "All Orders" tab to view all Orders and the "Active Orders" tab to view only Active Orders associated with your account.

Click the 'View All Squawks' button to see a complete list of Squawks associated with that order, regardless of the Squawks status.



After clicking the 'View Pending Squawks' button on an order you will be brought to the Order Detail page with the pending Squawks tab already loaded up.

To approve/reject a Squawk, please check the checkbox on the left side of the squawk you wish to approve/reject.

Once a squawk has been selected for review, click the approve or reject buttons where applicable.

You can clear all selections by clicking the clear selections button.

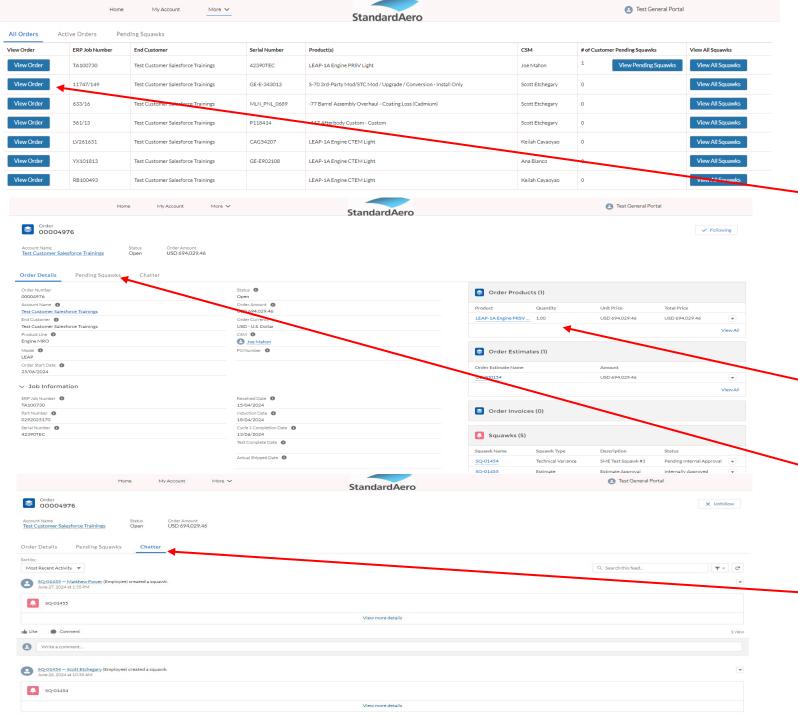
To view the Squawk detail page click the Squawk name clickable link.



This 'Pending Squawks' tab which is located on the 'My Orders & Squawks' page shows any pending squawks across all orders.

Please select the checkbox next to the squawk you want to approve

Once a Squawk has been selected for approval please click the approve or reject button.



To view the order detail screen please select the order you want to see and click the 'View Order' button.

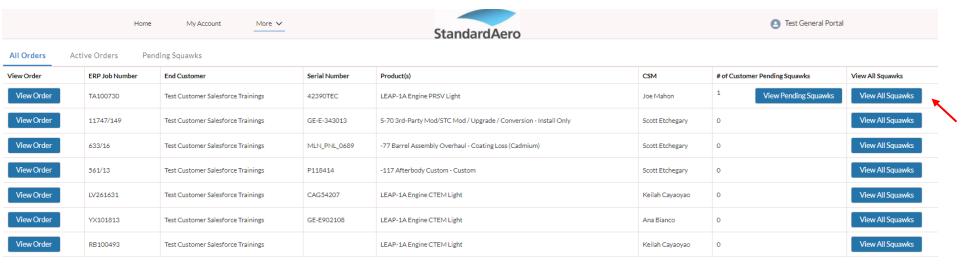
You will then be taken to the screen shown in the second screenshot.

This screen has details and related records on the first tab.

Order Products, Estimates and Invoices are available for review under there respective related lists.

The second tab contains the 'Pending Squawks' tab that was shown earlier this screen allows you to approve/reject squawks for this order.

The final tab is the 'Chatter' tab. This tab allows you to comment on Order or child squawks to provide key information and updates.



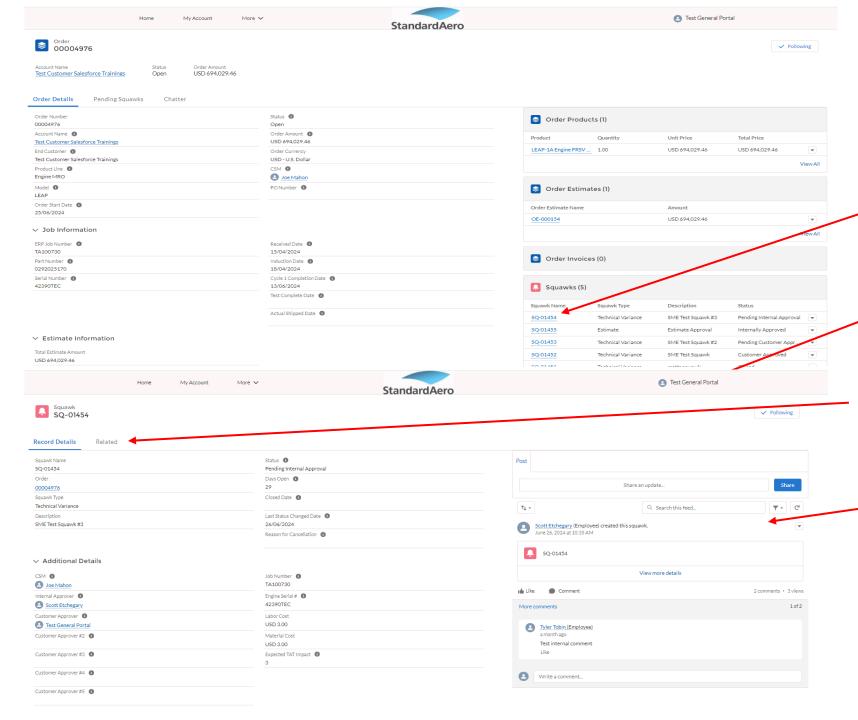
After clicking the 'View All Squawks' button on the 'My Orders & Squawks' page the following screen will be shown.



You can click any of the squawk names to view the squawk detail page.

This page will show any squawks related to that order regardless of status.

Users can use the 'Download To Excel' button to download a list of squawks as an excel spreadsheet.



In Order to view the squawk detail page head to the order that the squawk is a child of. Do this by clicking the 'View Order' button.

On that Order detail screen in the related lists, please click on the Squawk Name for which you wish to review.

This is the Squawks detail page. On this page you can see record details.

In order to see related record lists please click on the 'Related' tab.

On the right side of the screen chatter is available for use. You can use this area to post or comment on this squawk with key updates and information.

Note: Posts made here are visible to the applicable Customer Service Representative.