Account Portals in the New Customer Experience

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Overview

The Customer Account Portal gives your customers one place to manage their relationship with your business — from reviewing proposals and invoices to checking appointments, updating preferences, and viewing account information.

The updated portal brings those tools together in a cleaner, faster, mobile-friendly experience with your branding carried consistently throughout. Customers can move more easily from one task to the next and take care of common needs on their own, without having to contact your office.

This article will review:

- What's New in the Customer Portal Experience
- What Your Customers Can Do in the Portal

Your internal workflow is not changing: Your existing Account Creation and Online Scheduling settings continue to control what customers can access, and your current email and SMS templates continue to work the same way.

What's New in the Customer Portal Experience

A Cleaner, More Connected Layout

The updated portal brings invoices, proposals, statements, appointments, and account information together in a more polished and consistent layout.

Navigation between sections feels more seamless, and the page hierarchy makes it easier for customers to understand where they are and find the information they need without feeling like they are moving between disconnected pages.

Your Brand Throughout the Experience

Your logo, primary color, and secondary color are now applied consistently throughout the customer account experience.

That same branding carries across proposals, invoices, statements, appointments, and other customer-facing pages, helping the portal feel like a natural extension of your business.

Combined with the updated mobile-friendly layouts, customers get a more consistent experience whether they're managing their account from a computer or taking care of something quickly from their phone.

Designed for Mobile

The updated portal is much more mobile friendly, making it easier for customers to review account information and complete common tasks from a phone or tablet.

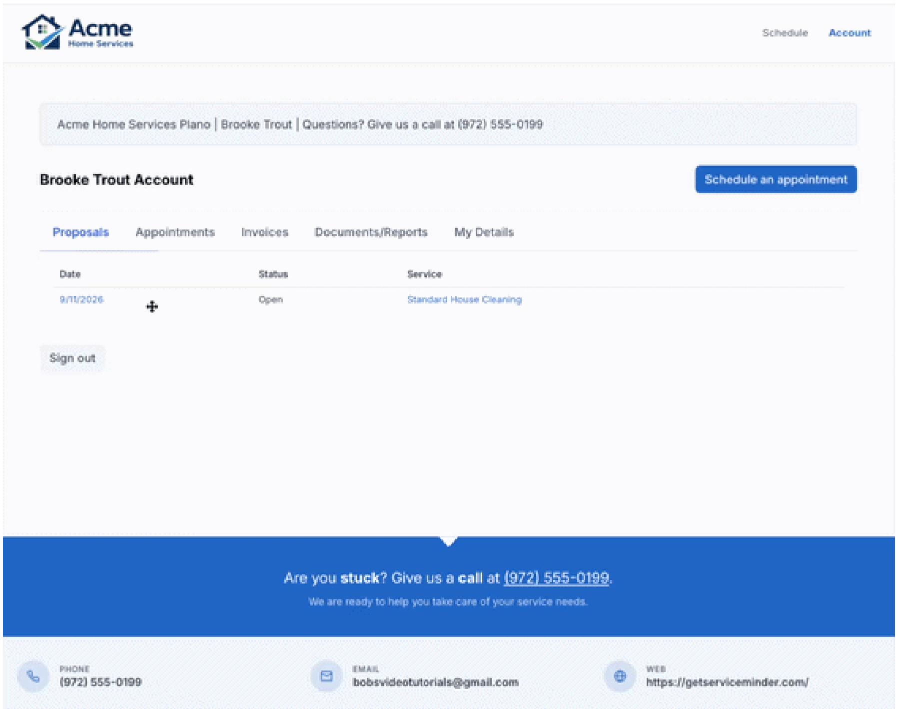
Layouts, spacing, and page structure adapt more naturally to smaller screens, so customers can check an appointment, review an invoice, or update their preferences without having to navigate a desktop-style page on their phone.

What Your Customers Can Do in the Portal

Once logged in, customers can access the information and actions associated with their account from one central portal.

From their account, customers can:

- View and pay open invoices
- Review proposals and statements
- View payment history and download receipts
- Review upcoming and past appointments
- Confirm an upcoming appointment
- See available appointment status information, including ETA and stops ahead
- Schedule a new appointment when Online Scheduling is enabled
- Update communication preferences
- Download documents associated with their account
- Update their password



Bringing these tools together gives customers a convenient place to answer common questions and complete everyday tasks themselves, reducing unnecessary back-and-forth with your office.

Viewing Proposals, Invoices, and Statements

The updated customer-facing proposal, invoice, and statement experiences carry directly into the portal.

When customers open a proposal from their account, they move through the same guided proposal experience they would see from a direct proposal link. They can review their services and options, complete the required acceptance steps, and see what happens next.

Invoices and statements use the same updated layouts as well, making it easier for customers to understand individual balances, review outstanding invoices, and complete payment. For customers using Consolidated Billing, related invoices are grouped together within the statement experience, providing a clearer picture of what is included in their balance.

This consistency means customers don't have to learn a different experience depending on how they reached a proposal or invoice. Whether they start from an email link or from their account, the information and actions are presented in a familiar way.

Managing Appointments

Customers can use the portal to keep track of their service without needing to contact your office for routine appointment information. They can review upcoming and past appointments, confirm an upcoming visit, and see available status details such as the Service Agent's ETA and how many stops are ahead of them.

If **Online Scheduling** is enabled for your organization, customers can also start a new booking directly from their account. They'll move into the same updated Online Scheduler experience used elsewhere, with a mobile-friendly, step-by-step flow for finding an available appointment.

Giving customers direct access to this information makes it easier for them to stay informed while helping reduce common "when are you coming?" or "how do I book again?" calls to your team.

Managing Account Details

The portal also gives customers a central place to manage information associated with their account. Customers can update their communication preferences or unsubscribe, download documents tied to their account, review payment history and receipts, and update their password.

Changes to communication preferences apply to the same settings used throughout the customer experience, so customers can manage how they hear from your business without needing separate preferences for different pages or interactions.