

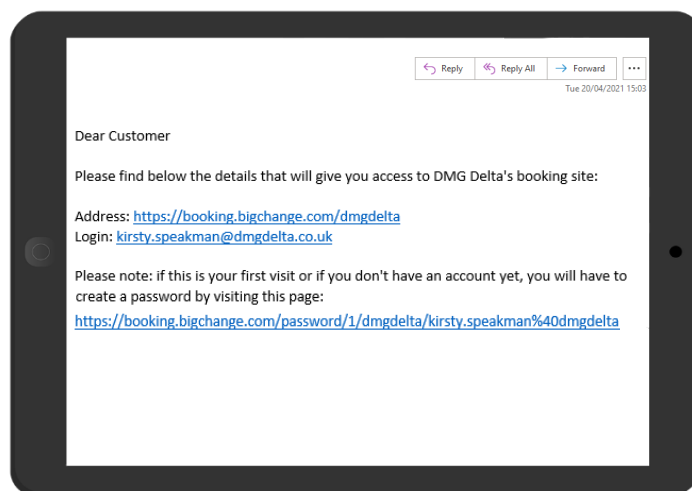
Client Portal User Guide



This guide has been created to make the experience of creating a client account as simple and seamless as possible.

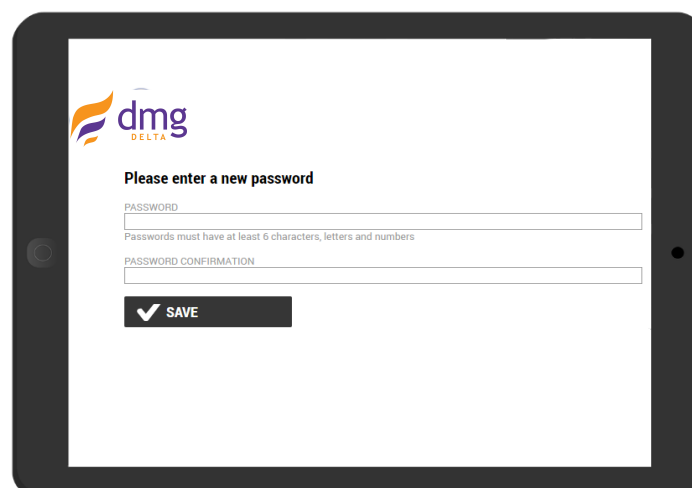
Step 1: Request Access

The first step of creating your account is to request access to the client portal via our Contracts Team. Once you have been given permission you will receive an email with your login details and an access link:



Step 2: Create an Account

Once you have clicked on the access link, you will be asked to create a password:



After you have entered your password, click *Save* and a confirmation pop-up will appear. You are now ready to log into the portal using your credentials.

Feel free to save our portal login page to your bookmarks for future reference.

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Step 3: View Jobs

Once logged in you will be presented with a list of jobs displaying the site name, date, time, reference, and job type. You can view the status of each job by hovering your mouse over the status icons on the right-hand side.

Date	Reference	Type of job	Contact	Status
20/04/2021 09:41	269187	006-Non chargeable	DMG Delta	🕒
19/04/2021 11:00	269186	006-Non chargeable	DMG Delta	✓
07/04/2021 08:00	267820	006-Non chargeable	DMG Delta	✓
06/04/2021 08:00	267819	006-Non chargeable	DMG Delta	✓
01/04/2021 08:00	267773	006-Non chargeable	DMG Delta	✓
31/03/2021 08:01	267772	006-Non chargeable	DMG Delta	✓
30/03/2021 08:01	267771	006-Non chargeable	DMG Delta	✓
30/03/2021 14:31	268424	001-Priority 2	DMG Delta	✓
29/03/2021 07:45	267770	006-Non chargeable	DMG Delta	✓
23/03/2021 08:01	267137	006-Non chargeable	DMG Delta	✓

Step 4: Search Jobs

Clicking on the *Search* icon will show 3 new fields:

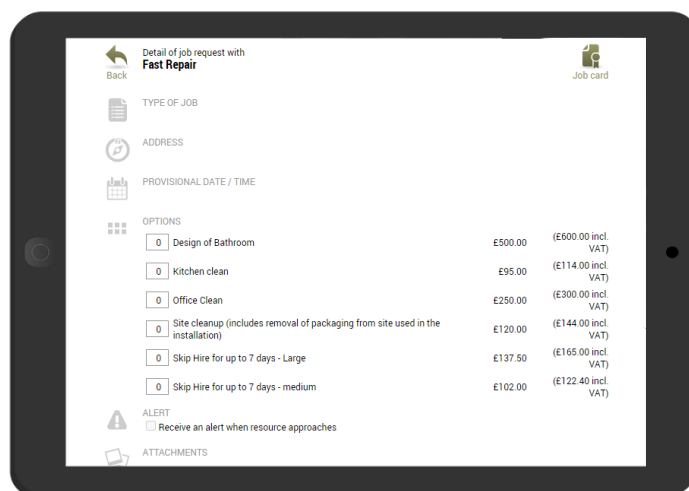
1. **Reference/Order number** allows you to search by either the reference or order number.
2. **Location** allows you to filter by location, this is useful where there are parent and child(ren) sites.
3. **Date** allows you to search between date parameters and filter between planned, actual or creation dates.

Use these fields to find a specific job quickly:

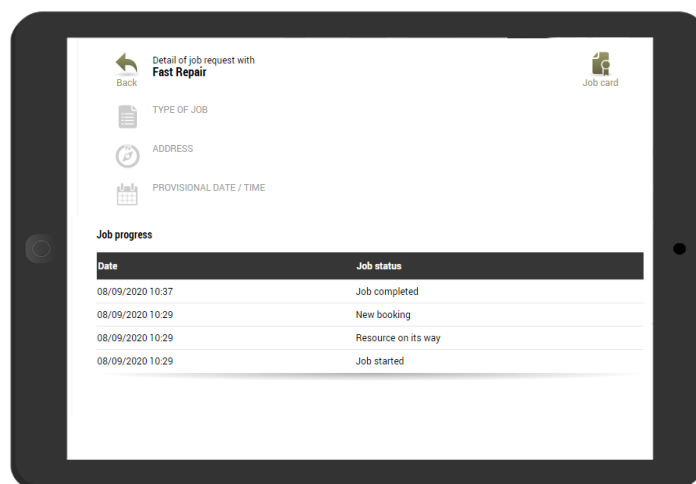


Step 5: View Job Cards

Once you have used the Search function to locate a job, click on the job to access the job card/job progress:



Where possible, the *Attachments* section will hold a copy of the job card and any quotations raised for follow-on works.



Please note there is currently no *Job Detail* column in the main view, and you will need to view each job individually.

After logging a call, you should receive a confirmation email from us stating the job reference. This reference can be entered into the search box to filter jobs faster.

In most cases planned maintenance jobs will be scheduled for the 1st of each month indicating the month it will be completed. Our Operations Team will contact the necessary personnel to confirm a booking.

If you have any queries at all regarding the booking site or required further information, please do not hesitate to contact us.