



BUSINESS
MANAGEMENT
SOFTWARE

Guide

CUSTOMER PORTAL



Making life easier for you and your contractor!

Pay Invoices Online | Setup AutoCharge | Approve Proposed Work | Submit a Work Request



CUSTOMER PORTAL GUIDE

Welcome to LMN's Customer Portal! The Portal was designed to allow Customers of Contractors to make Payments Online, review, approve Estimates, submit Work Requests, and communicate in real-time with your Contractor.

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- 2 Pay Online
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TO ACCESS THE CUSTOMER PORTAL, THE CONTRACTOR WILL SEND YOU A 'WELCOME EMAIL' TO CREATE AN ACCOUNT.

LMN Customer Portal <portal@golmn.com>
to me ▾

Mon, Nov 30, 11:07 AM

LOGO

Holly Faulds from Sampletree Landscaping has invited you to register an account on the Customer Portal. Your personal invitation link is shown below.

[Click here to create your new account.](#)

Note: this invitation link will expire in 5 days.

Sampletree Landscaping
14 Wentworth Ct Unionville, Ontario
sample@golmn.com 5556665555



STEP 1:

CREATE YOUR CUSTOMER PORTAL ACCOUNT

Simply click the link to create your Customer Portal account to establish a login. Please note the registration link will **expire in 5 days**. If the link has expired, please contact the Contractor to ask them to resend the invite.

Get Started with a Free Account

Sign up in 30 seconds, and start tracking your sites

Email *

Username *

First name * Last name *

Password * Repeat Password *

I agree to the [Services Agreement](#)

CREATE ACCOUNT

Once your account is created, bookmark to your browser for ease of use. Also note, if you have forgotten your login credentials, please click the “forgot username or password” button.

Log in to the Customer Portal to Pay Invoices Online, view Estimates, and submit Work Requests. If applicable, you may add additional Portal users to your account and provide the same or modified access. Setup your Profile by enabling email notifications to receive an alert if an Invoice or Estimate has been published to your Portal.

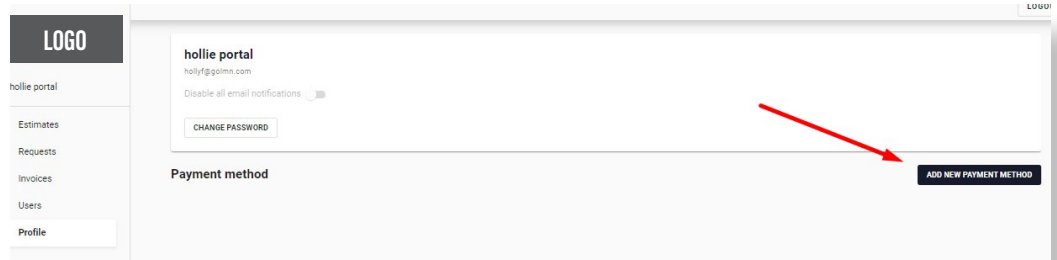




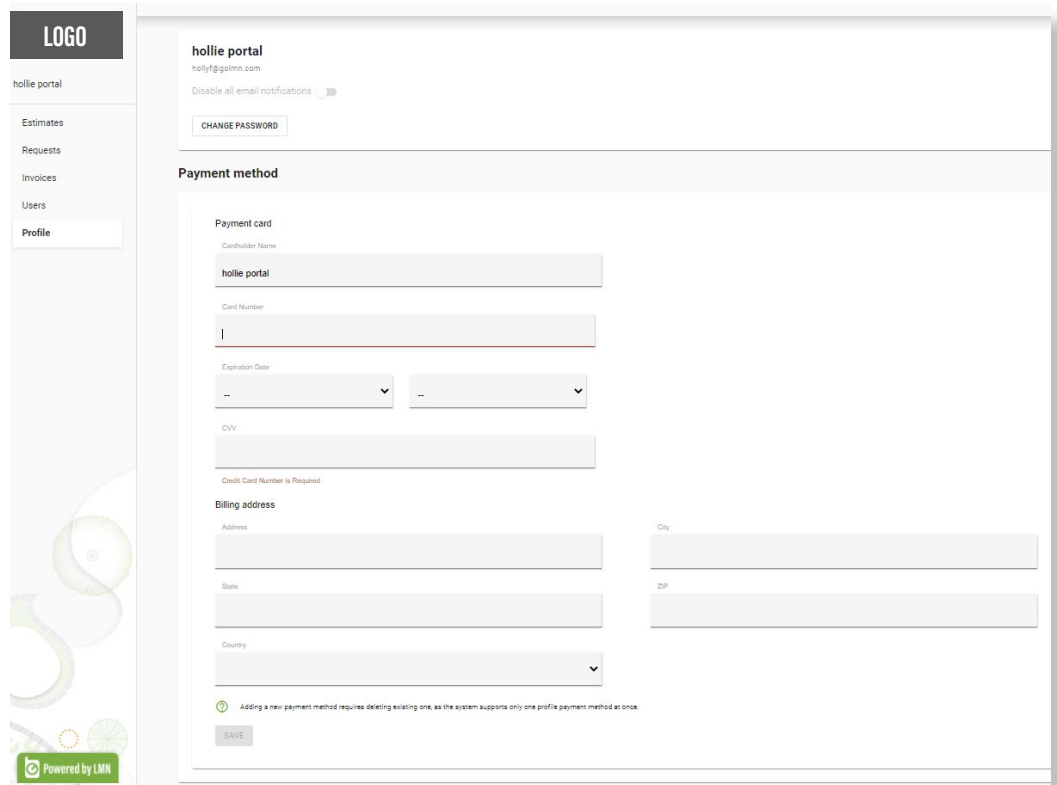
STEP 2:

PAY INVOICES ONLINE

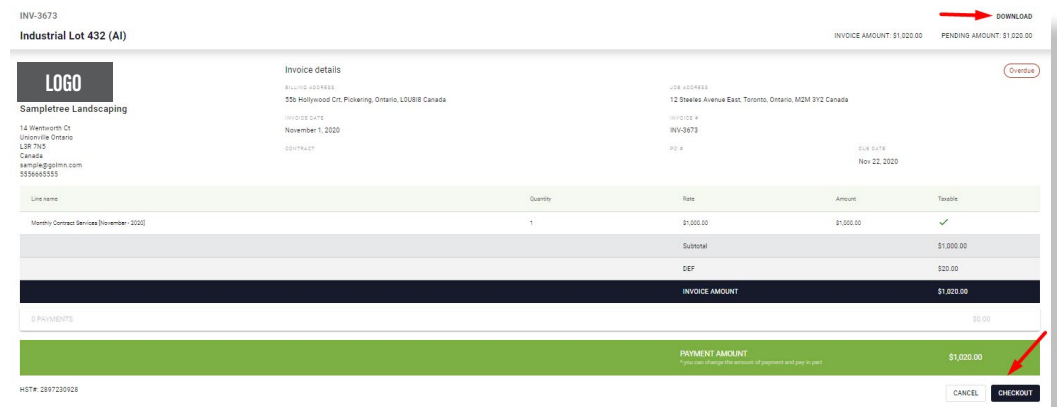
In order to make Payment Online, you will need to add a Payment Method. You will find this option under the Profile tab. ****TIP**** Once a Payment Method is added, you can setup auto-charge for recurring monthly invoices.



Click Add New Payment Method to add your desired credit card and/ or ACH payment. Please note, check with your Contractor if they accept ACH).



To make a Payment against an Invoice that has been published to the Customer Portal, click the Invoices tab and select the applicable Invoice. Once viewed, you can download the Invoice for your records and click Checkout. Select Payment Method and select Pay Now.





SETUP AUTO-CHARGE

In your Customer Portal Account, select Profile and Add New Payment Method, and select Use for auto-charge.

Payment Payment
lmncptest@outlook.com

Disable all email notifications

Payment method

Payment card CARD NUMBER
***** 5036

Use for auto-charge

Adding a new payment method requires deleting existing one, as the system supports only one profile payment method at once.

By enabling this option, you allow contractors to automatically charge this card to cover pending invoices.

Payment method

Payment card CARD NUMBER
***** 5036

Use for auto-charge

Adding a new payment method requires deleting existing one, as the system supports only one profile payment method at once.

By enabling this option, you allow contractors to automatically charge this card to cover pending invoices.

* Please add maximum amount that may be charged automatically without your confirmation (\$10.00 - \$10,000.00)

Auto-charge limit *
\$1000.00

Enter the limit you want to authorize for auto-charge(s) to your card and click Save.

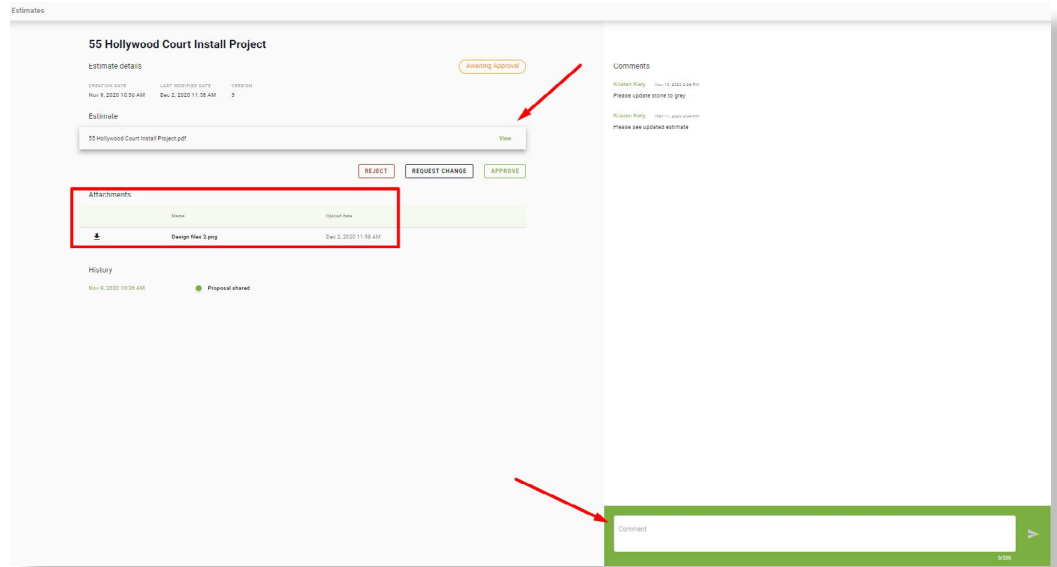




STEP 3:

REVIEW, APPROVE AND COMMENT ON PROPOSED WORK

To review, approve, request change, or comment on an Estimate proposed by Contractor, click **Estimates** tab:



STEP 4:

HAVE A WORK REQUEST? EASILY SUBMIT WORK REQUEST(S) TO YOUR CONTRACTOR RIGHT WITHIN THE PORTAL

To submit a Work Request, click **Requests > Submit New Request** and fill in the required details of your request:

Submit new request

Please fill in the required fields and click "Submit" to create new task for Sampletree Landscaping.

CREATED BY
holly portal

Urgent request

Request Description * 0 / 100

Jobsite ▼

Request details

Instructions 0 / 255

Photos

UPLOAD PHOTOS ? You can upload .png and .jpeg files. You can upload no more than 10 photos.

SUBMIT

Once the task is submitted, you will be only able to comment it and add photos. Task Name, Jobsite and Instructions will be final.



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