

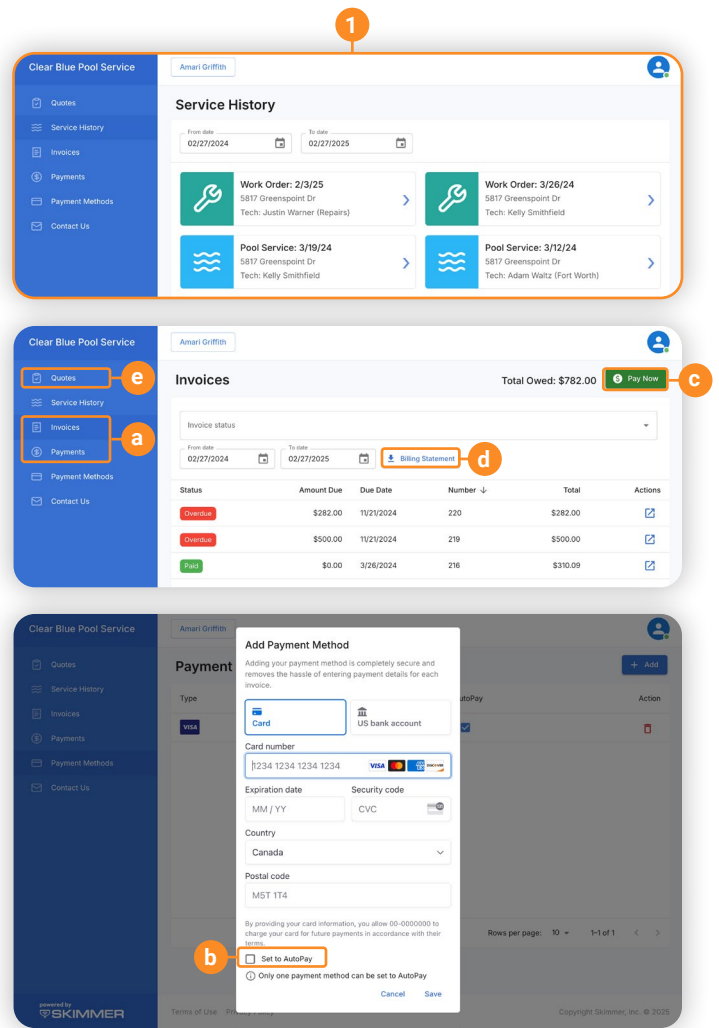
Guide To Launching Your Own Customer Portal

The customer portal is a game-changing tool for improving your customers' experience and business efficiency. It is available for all tiers, but has different feature access and additional functionality for Skimmer Billing users. This getting-started guide overviews all of these details to help you prepare to launch your own portal and build stronger relationships through transparency and convenience.

Customer Portal Overview

Enhance your customer experience by giving them direct access to their account information.

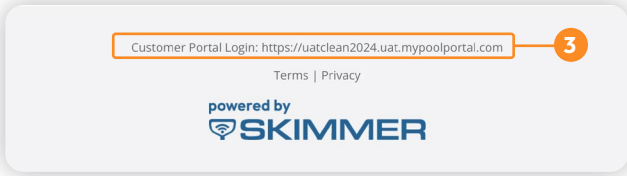
1. All customers have 24/7 access to view their service history once your service email settings are enabled to show service history.
2. For Skimmer Billing users*, your customers also have access to:
 - a. Invoices and payments
 - b. Ability to set up AutoPay and update payment methods if your payment account is enabled in payment settings to collect payment methods
 - c. Ability to pay multiple outstanding invoices at once with a single click
 - d. A downloadable PDF of their invoices and billing statements for a full record of transactions
 - e. Options to view and approve quotes as well as track past requests**



***NOTE:** If you don't use Skimmer Billing, your customers will still be able to view these additional portal features, however, if they click on these menu options, the following messages will be displayed: "No results found" or "Payment Methods are disabled." Ask your pool service provider about enabling billing features."

****NOTE:** Quotes is available on the Scaling Up and Owning the Market tiers. For the Getting Started tier, Quotes is visible in the portal, however, if your customer clicks on this menu option, the following messages will be displayed: "Quotes are disabled." Please ask your pool service provider about enabling quotes."

3. The portal URL is automatically included at the bottom of your service emails, invoices and paid receipts for easy access.

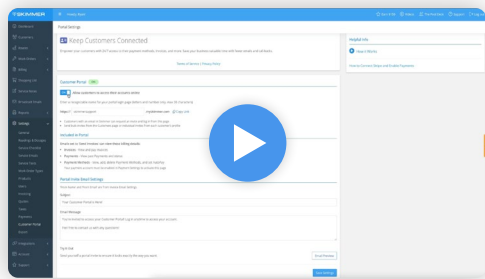


Improve business efficiency and cash flow with a professional portal that reduces billing and service-related questions, minimizes payment follow-ups, and cuts down on admin work.

Best Practices For Selecting Your Portal URL

Keep it simple by using your company name or a close variation that represents a professional online presence for your business.

NOTE: Each portal URL is unique, so if your choice has already been taken by another Skimmer customer, you will be prompted to select a slight variation, i.e., if sparklingpools.mypoolportal.com is taken, an alternative might be sparklingpoolsTX.mypoolportal.com.



Setting Up Your Portal In Skimmer

This short tutorial will overview how to set-up your portal and select your URL.

[Watch Tutorial](#)

Inviting Customers To Join Your Customer Portal

If you use **Skimmer Billing** for your invoicing and payments, this is an ideal opportunity to get more of your customers on AutoPay. Segment your customers into two groups: those with a payment method on file and those without. Then, use the two different email templates designed to target each group* to invite your customers to join your portal. The non-payment method group will be encouraged to start using the AutoPay feature.

***BONUS:** We added two new filters to your customer list—customers with a payment method and customers without a payment method—to help you easily select which customers to send two different portal invitation emails.

- ✓ All Customers
- Customers With Route Assignments
- Customers Without Route Assignments
- Customers With Payment Method
- Customers Without Payment Method
- Customers With Service Texts On
- Customers With Service Texts Off

If you don't use **Skimmer Billing**, the portal provides value to your customers by giving them 24/7 access to their service history. Use the template below to invite your customers to your portal.

[Access Email Templates](#)

Frequently asked questions



Q: How do I change my portal URL?

A: You can update your customer portal URL anytime by navigating to settings > customer portal. You have the option to send a broadcast email to notify your customers of the change; however, once updated, the new URL will automatically be updated in all your invoices and emails. Your customers can continue logging in without creating a new account.

Q: Can customers with multiple service locations access all their accounts in the portal?

A: Yes, your customers who have multiple service locations associated with the same email address can log in and switch between their customer profiles at the top of the portal to view information for each service location. However, they will receive separate portal invites for each service location, and those invites will be sent to the same email address. They have to accept each invite, and the information will automatically link to the same portal.

Q: What happens if another Skimmer user claims the URL I want?

A: You'll be prompted to select another URL and could use a slight variation (e.g., sparklingpoolsTX.mypoolportal.com instead of sparklingpools.mypoolportal.com).

Q: Can I control what details my customers see in their service history?

A: Yes, customers will only see the information you've enabled in your service email settings, allowing you to control what details, such as readings and dosages, are visible. This also applies to work orders.

Q: Will inactive locations for customers with multiple locations be displayed?

A: Yes, if a customer has multiple locations, with one or more being inactive, the inactive locations will be displayed in the portal.

Q: Can my customers add an ACH account in the portal?

A: Yes, your customers can add a bank account by selecting "add" on the payment methods page and clicking "add bank account," just like when making a payment through an invoice.

By following this guide, you'll maximize the value of the customer portal for your business and your customers, creating a seamless, trusted experience.

Need more help? Contact our dedicated support team at support@getskimmer.com.

To expand your portal experience, learn more about Skimmer Billing. Our billing and payments team spends time with customers to help them understand how Skimmer Billing works to improve their payment processes. Book a meeting to learn more.

[Book a Billing Meeting](#)