

Guide To Launching Your Own Customer Portal

The Customer Portal is a game-changing tool for improving your customers' experience and business efficiency. This getting-started guide will help you launch your own portal to give your customers access to their service history, enable seamless billing and payments with AutoPay, and build stronger relationships through transparency and convenience.

Customer Portal Overview

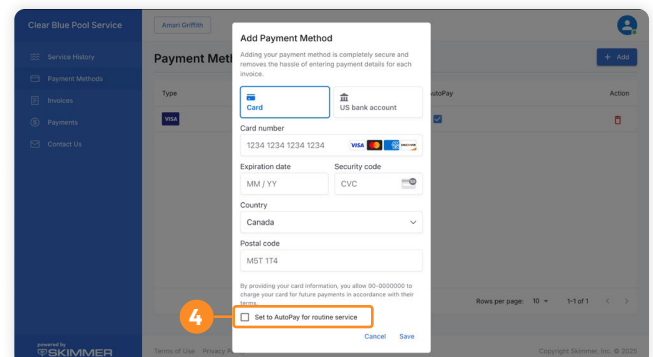
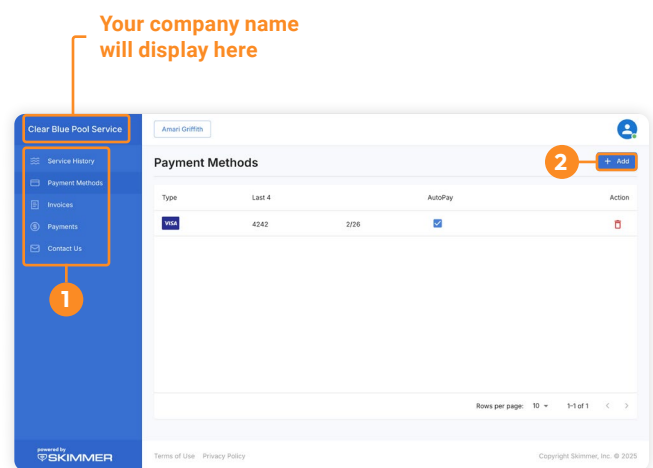
Enhance your customer experience* by giving them direct access to their account information.

1. 24/7 access to view service history, invoices, and payment methods.
2. Ability to set up AutoPay and update payment methods.
3. The portal URL is automatically included at the bottom of your invoices and paid receipts for easy access.

***NOTE:** Your payment account must be enabled in Payment Settings to collect payment methods and Service Email Settings must be enabled to show service history.

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

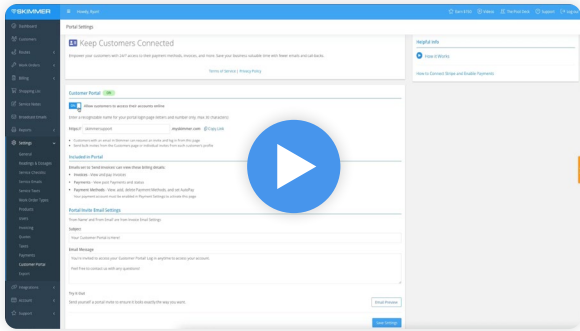
4. Improve cash flow and payment predictability by encouraging more customers to set up AutoPay.



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

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.

[Access Email Templates](#)

***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

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.