



Service **Autopilot**™

CLIENT PORTAL

USER GUIDE FOR CLIENTS

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About the Client Portal

Your service provider has invited you to use the **Client Portal**, which lets you manage your account and make payments online.

With the Client Portal, you can:

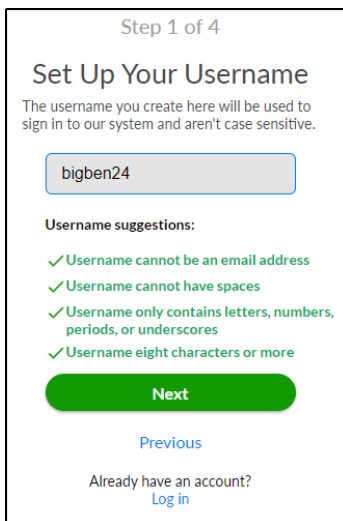
- Pay Invoices (page 5)
- See upcoming and past visits from your service provider (page 7)
- View your account information (page 8)
- Create Tickets, if supported by your service provider (page 18)
- Make ACH Payments, if supported by your service provider (page 20)
- Use the **Manage Service** mobile app for most actions (page 22)

Set Up Your New Account

Your service provider will send you an email with a link to the registration page. After you receive it, follow these steps to set up your new Client Portal account.

1. Open the email containing the signup link.
2. Click the link [Click here to register](#). This will open a setup wizard in your browser.
3. In step 1 of the wizard, enter a username for yourself. It must have eight characters or more and be composed of letters, numbers, periods, or underscores.

Note: Your username must be unique among all users of this program, so you might have to try a few options till you find one that is accepted. A common method is to append numbers after your name.



The screenshot shows a registration form titled "Step 1 of 4" and "Set Up Your Username". Below the title, it states: "The username you create here will be used to sign in to our system and aren't case sensitive." A text input field contains the username "bigben24". Below the input field, under the heading "Username suggestions:", there are four green checkmarks with the following text: "Username cannot be an email address", "Username cannot have spaces", "Username only contains letters, numbers, periods, or underscores", and "Username eight characters or more". At the bottom of the form, there is a large green "Next" button, a blue "Previous" link, and a link for "Already have an account? Log in".

4. Click **Next**.

5. Enter your password. It must have eight or more characters, upper- and lowercase letters, at least one number, and at least one special character.
6. Click **Next**.
7. Answer three security questions.

Step 3 of 4

Choose your security questions

These questions will be used to help verify your account.

QUESTION 1
What city were you born in?

ANSWER

QUESTION 2
What was the model of your first car?

ANSWER

QUESTION 3
What is your favorite dessert?

ANSWER

Next

Previous

Already have an account?
Log in

Step 2 of 4

Set Up Your Password

The password you create here will be used to sign in to our system.

Password rules:

- ✓ Password is eight or more characters
- ✓ Password cannot have spaces
- ✓ Password has upper and lowercase letters
- ✓ Password has at least one number
- ✓ Password has at least one special character (excluding: + @ & ' () < > # \ ")

Next

Previous

Already have an account?
Log in

8. Click **Next**.
9. Review and accept the terms of use. You can also opt in to text message and email notifications.
10. Click **Next**. The page will reload and take you to a login screen.
11. Enter your new username and password to log in.

Step 4 of 4

Review Our Terms of Use

Make sure you review and accept our Terms of Use in order to create your account.

Last Modified: November 23, 2020

Acceptance of the Terms of Use

These terms of use are entered into by and between You and Bactell LLC dba Service Autopilot ("Company," "we," or "us"). The following terms and conditions, together with any documents they expressly incorporate by reference (collectively, "Terms of Use", govern your access to and use of ManageService.com or ManageAndPayMyAccount.com, including any content, functionality, and services offered on or through ManageService.com or ManageAndPayMyAccount.com (the "Website").

I Accept

I would like to receive email and text notifications

Next

Previous

Already have an account?
Log in

The Client Portal has been updated!
Please log in with your current username and password to get started.

Welcome Back

Sign in to get started

bigben24

.....

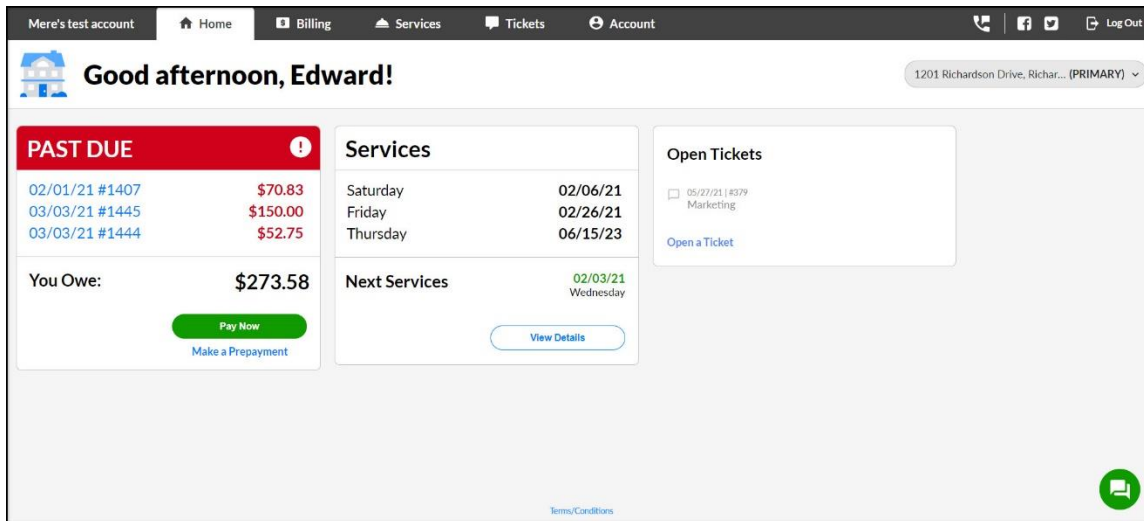
LOG IN

Forgot Password?
Terms/Conditions

Using the Client Portal

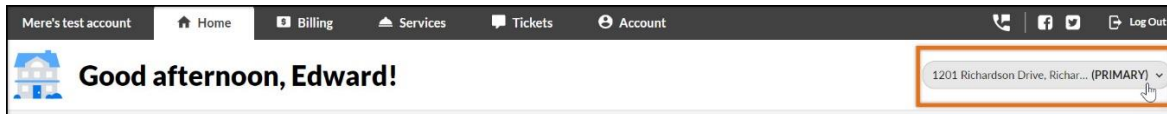
Once you log into Client Portal, you'll have several options for what to do next. The options available depend on how your service provider set up your account.

After logging in, you'll see the home page:



The navigation bar at the top shows the Display Name, different tabs you can access (described below), a contact menu containing the company email and phone number, social media widgets, and the option to log out.

If your company has Related Properties, select from the dropdown list to view different properties:



If you have one Account, the dropdown list will appear gray as in the screenshot above.

You'll see a list of past due Invoices along with an option to **Pay Now** and a list of Services with the option to view more details. Read on for instructions on paying your invoices.

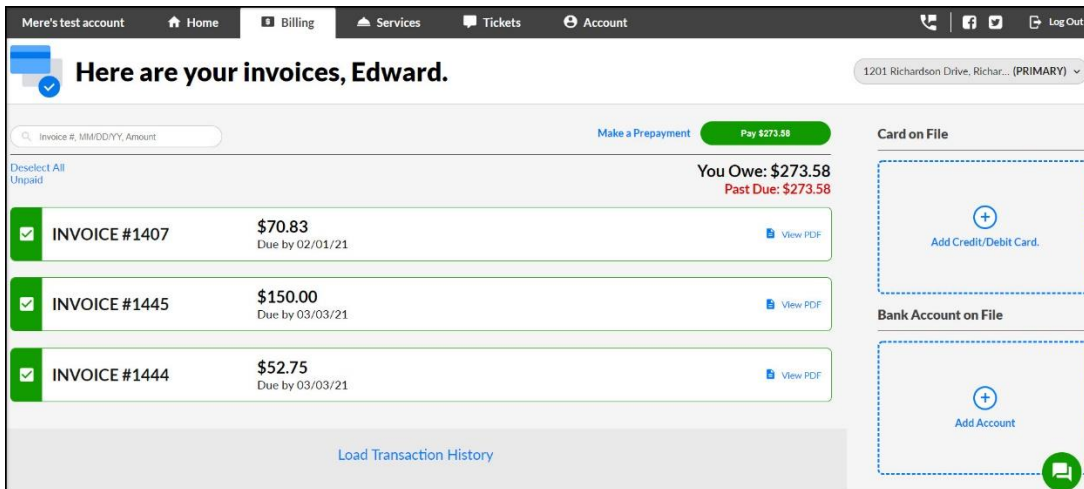
Manage Payments

From the “Billing” tab, you have several options to manage your payments. Unpaid Invoices appear in a list that you can search by Invoice Number, date, or amount.

Make a Payment

By default, all outstanding Invoices will be checked so you can make a single payment for all.

1. Click **Select All Unpaid** or click individual Invoice lines that you want to pay:



2. Click the green **Pay** button at the top of the table. Paying an Invoice will open a screen to confirm the Payment Method and make the actual Payment.

Make a Prepayment

You might have the option to make Prepayment if you are set up to do this.

Click the blue **Make a Prepayment** link next to the green **Pay** button. Prepayments will not automatically apply to any existing Invoices or scheduled services.

See Your Current and Past Transactions

From the “Billing” tab, you can:

- View PDFs of each individual outstanding Invoice.
- See a list of previous payments and credits by clicking **Load Transaction History**.

<input checked="" type="checkbox"/>	INVOICE #1407	\$70.83 Due by 02/01/21	View PDF
<input checked="" type="checkbox"/>	INVOICE #1445	\$150.00 Due by 03/03/21	View PDF
<input checked="" type="checkbox"/>	INVOICE #1444	\$52.75 Due by 03/03/21	View PDF
Load Transaction History			

- Click **Load Invoices** under any payment to view the invoice(s) it's associated with.

Your Transactions		
Credit CC Refund	+\$52.75 Paid on 01/15/21	Applied to None
Payment Visa	\$202.75 Paid on 01/15/21	Invoice(s) 1408
Payment Discover	\$96.93 Paid on 11/02/20	Invoice(s) Load Invoices

Add a Credit Card

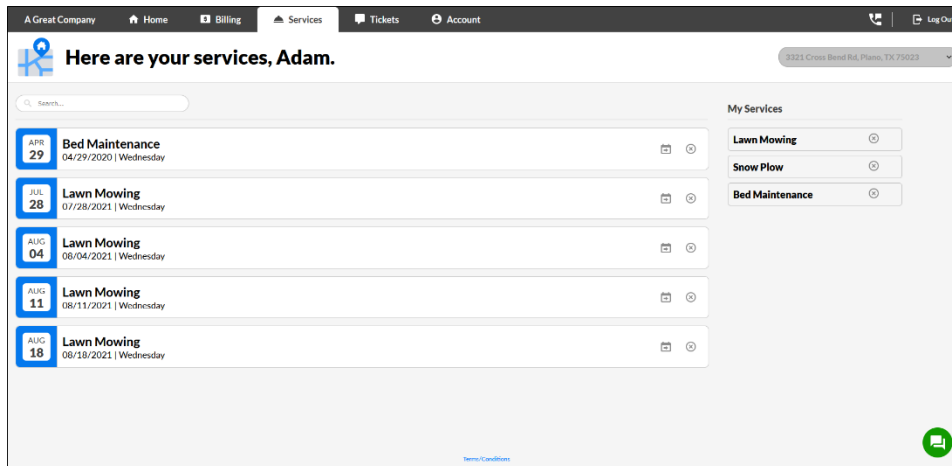
From the “Billing” tab, you can add a credit card to remain on file.

Check Autopay Enrollment

From the “Billing” tab, you can see whether you are enrolled in Autopay.

See All Jobs

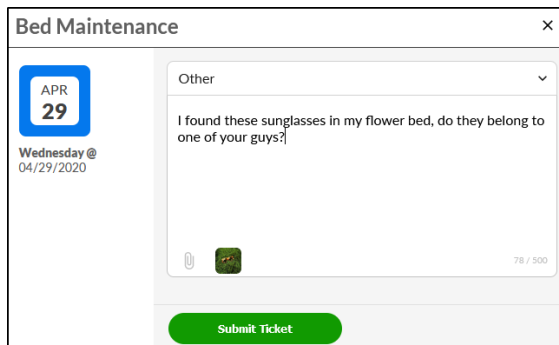
The “Services” tab shows your currently scheduled jobs, past service history, and jobs that are on your Account but not yet scheduled:



The Services listed on the right have been added to your Account but are not yet scheduled. When a job is scheduled, it will move to the left side of the screen.

Create a Ticket on the “Services” Tab

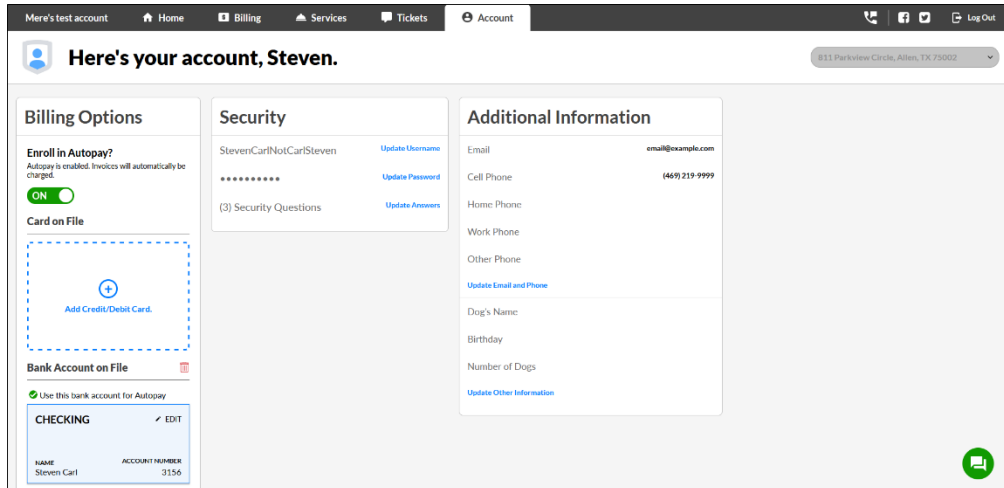
If your account allows it, you can click a card to submit a Ticket related to the Visit:



See “Open a Ticket” on page 18 for full instructions.

View Your Account Information

The “Account” tab shows current information about your account.



On this tab, you can:

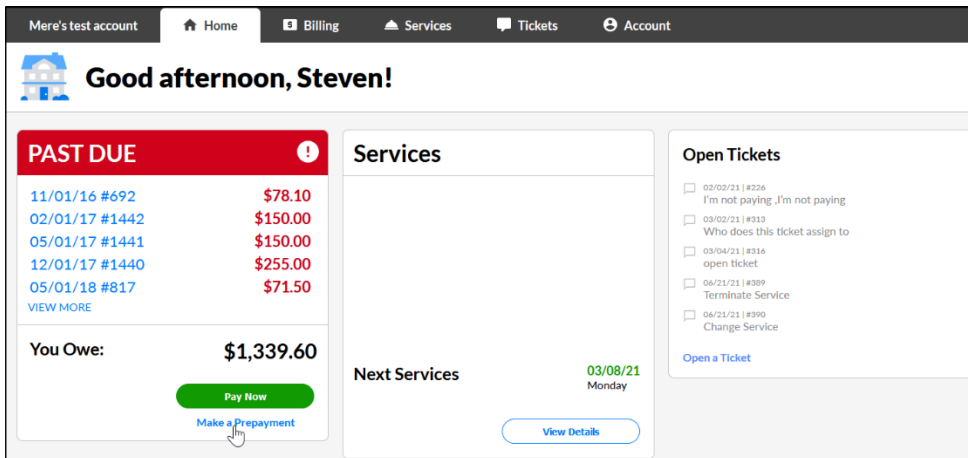
- **Update your autopay setting.**
Note: Enrolling in autopay will update existing scheduled Jobs to be paid using autopay.
- **Update your contact information** including username, password, security questions, email, and phone numbers.
The “Additional Information” panel will display the email and phone numbers on file for your account.
- **Change Custom Fields**, if any are provided.

See “Manage Your Account Information” on page 17 for full instructions.

Make a Prepayment

If you are set up for them, you can make Prepayments, which are separate from any existing Invoice. When you make a Prepayment, it will be recorded on your Account. After you receive an Invoice, you can select the Services to which you want the Prepayment to apply. To make a Prepayment:

1. From the “Home” tab, click the blue **Make a Prepayment** link in the account balance panel:



2. By default, the credit card on file will be selected for use. Click **Use Different Credit/Debit Card** to enter a different card:

The 'Make a Prepayment' form is displayed in a modal window. It is divided into two main sections: '1. Payment Method' and '2. Amount to Prepay'. Under '1. Payment Method', there is a green box for 'AMEX' (CARD ON FILE: AMEX ending in 1004; NAME ON CARD: Steven Carl; EXPIRES ON: 04/2023) and a grey box for 'CARD' with the option 'Use Different Credit/Debit Card' and 'CHOOSE THIS OPTION FOR: One-time Payments'. Under '2. Amount to Prepay', there is a text input field for the amount, currently showing '\$ 0.00'. At the bottom, there is a 'Prepay' button and a 'TOTAL: \$0.00' display. A 'Terms/Conditions' link is located at the bottom center.

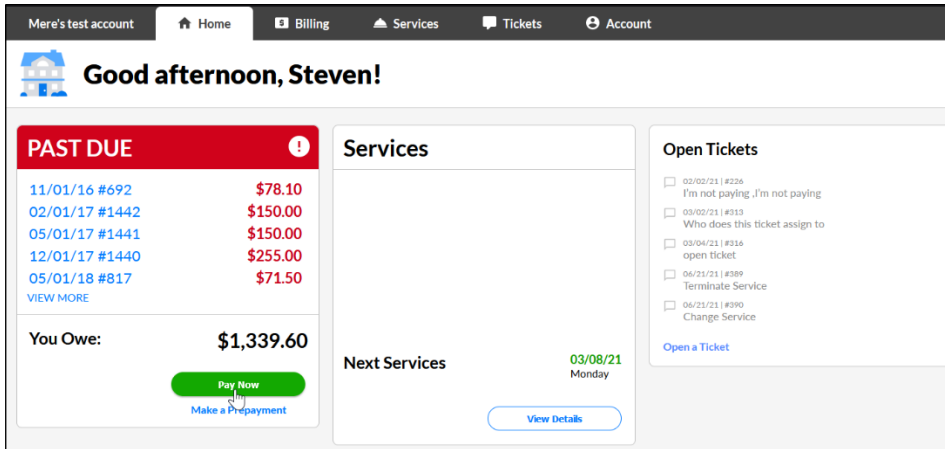
3. Enter the amount of the Prepayment in the **Amount to Prepay** field.
4. Click the green **Prepay** button.

A confirmation message will appear, and you can see it immediately in your list of transactions on the “Billing” tab.

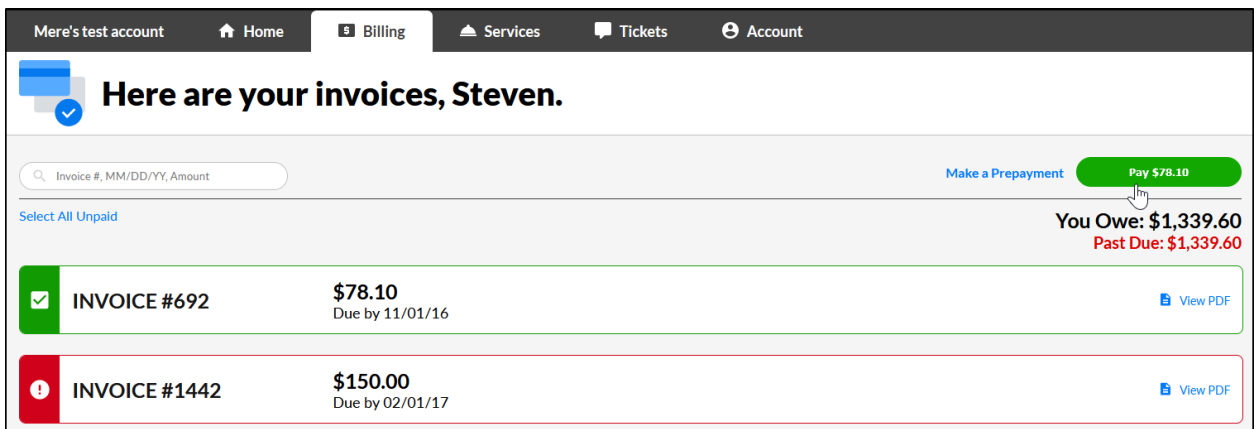
Pay an Open Invoice

To make a credit card Payment, follow these steps:

1. Log in to the Client Portal program.
2. From the Home Page, click **Pay Now**.



3. Check the boxes next to the Invoice(s) you want to pay or click **Select All Unpaid**.
4. Click the green Pay button.



- To use the credit card already on file, click **PAY INVOICES**. Otherwise, add the card information for the card you would like to use.

The screenshot shows a window titled "Make a Payment (1 Invoices)" with a close button in the top right corner. It is divided into two sections:

- 1. Payment Method**: This section contains two options. The first is a green box with an "AMEX" button, "CARD ON FILE" label, and details: "AMEX ending in 2376", "NAME ON CARD", and "EXPIRES ON 12/2026". The second is a grey box with a "CARD" button and the text "Use Different Credit/Debit Card" and "CHOOSE THIS OPTION FOR: One-time Payments".
- 2. Review Invoices to be Paid**: This section shows a table with one row: "INVOICE #998" on the left, "\$30.00" in red in the middle, and a "Remove" link on the right.

At the bottom of the window, there is a green "PAY INVOICES" button, a red "TOTAL: \$30.00" label, and a "Terms/Conditions" link.

- Click **Got it** to dismiss the confirmation message. You'll then be returned to the "Billing" tab.

The screenshot shows a confirmation message box with a close button in the top right corner. It features a green checkmark icon at the top, followed by the heading "Payment Success" and the text "Your payment of \$30.00 was successfully completed." At the bottom, there is a green "Got It" button.

To see the new Payment applied to the Account, refresh the "Billing" tab.

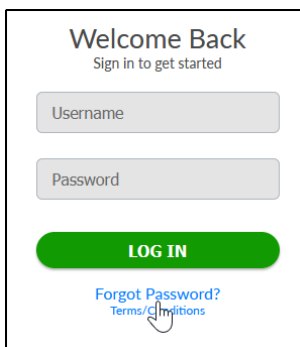
Reset a Password

If you forget your password (and don't we all?), you can reset it using your username and the answers to your security questions OR the email address for your account.

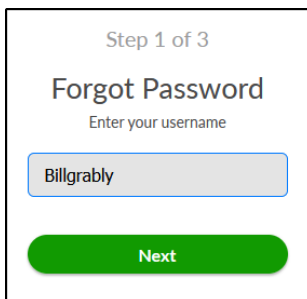
In the Client Portal, follow these steps.

Reset Password with Security Questions

1. Go to the Client Portal URL or the Client Portal app to log in.
2. Click the **Forgot Password** link below the green **Log In** button.



3. Enter your username and click **Next**.



4. Answer the security questions and click **Next**.

5. Enter a new password and click **Submit**:

Step 3 of 3

Reset Your Password

The password you create here will be used to sign in to our system.

SHOW

Password rules:

- ✓ Password is eight or more characters
- ✓ Password cannot have spaces
- ✓ Password has upper and lowercase letters
- ✓ Password has at least one number
- ✓ Password has at least one special character (excluding: + @ & ' () < > # \ ")

Submit

Reset Password with an Email Address

1. Go to the Client Portal URL or the Client Portal app to log in.
2. Click the **Forgot Password** link below the green **Log In** button:

Welcome Back

Sign in to get started

LOG IN

[Forgot Password?](#)
[Terms/Conditions](#)

3. Enter your username and click **Next**.

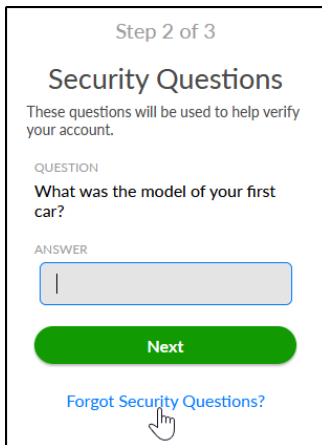
Step 1 of 3

Forgot Password

Enter your username

Next

4. Click **Forgot Security Questions?** under the **Next** button:



Step 2 of 3

Security Questions

These questions will be used to help verify your account.

QUESTION

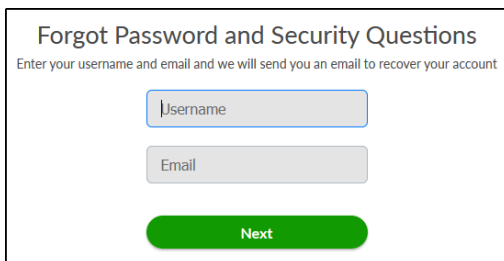
What was the model of your first car?

ANSWER

Next

[Forgot Security Questions?](#)

5. Enter the username and email address for the Account and click **Next**.



Forgot Password and Security Questions

Enter your username and email and we will send you an email to recover your account

Next

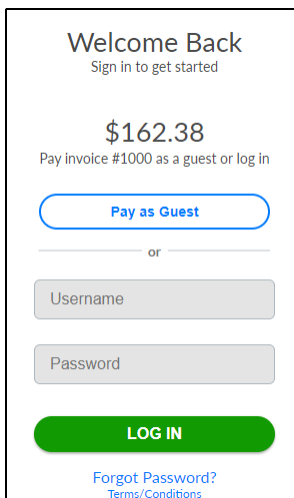
6. An email with the subject line “Your portal password recovery request” will be sent to the email address you entered. Open the email and click the URL to continue resetting the password.
7. Enter your username and click **Next**.
8. Enter a new password and click **Submit**.

Use Guest Checkout to Make a Payment

Making a Payment as a guest in the Client Portal will not save your credit card information. To save your card information, you need to create a user account as shown in “Set Up Your New Account” on page 2.

To complete a transaction as a guest in the Client Portal, follow these steps:

1. When you receive an email from your service provide, click the **Pay Now** link.
2. On the Client Portal landing page, click **Pay as Guest**.



Welcome Back
Sign in to get started

\$162.38
Pay invoice #1000 as a guest or log in

[Pay as Guest](#)

or

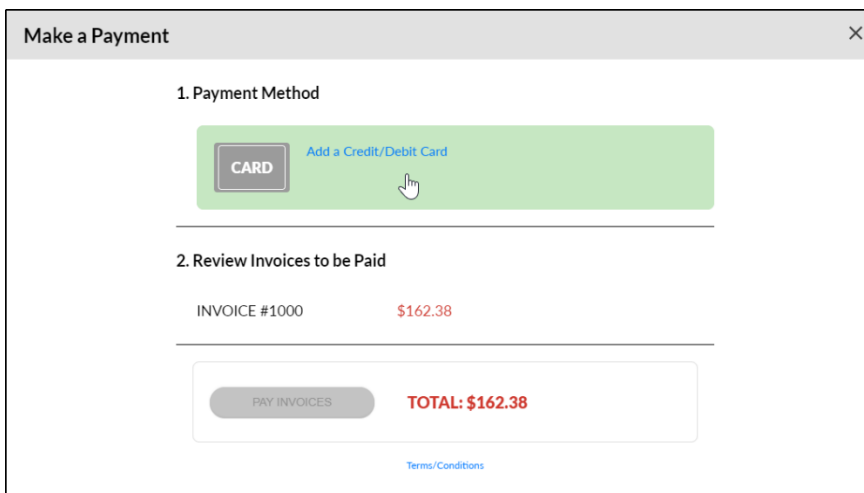
Username

Password

LOG IN

[Forgot Password?](#)
[Terms/Conditions](#)

3. On the **Make a Payment** page, click **Add a Credit/Debit Card**.



Make a Payment

1. Payment Method

CARD [Add a Credit/Debit Card](#)

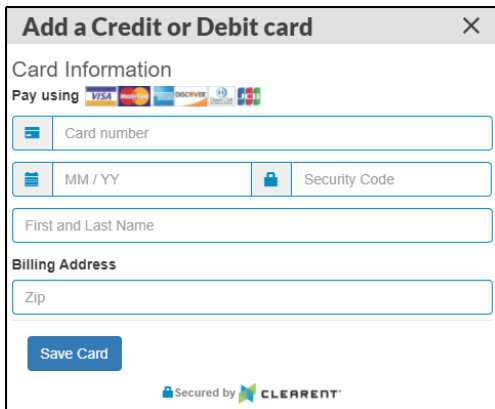
2. Review Invoices to be Paid

INVOICE #1000 **\$162.38**

PAY INVOICES **TOTAL: \$162.38**


[Terms/Conditions](#)

4. Fill out the credit card overlay and click **Save Card**.



The screenshot shows a modal window titled "Add a Credit or Debit card" with a close button (X) in the top right corner. The form is divided into two main sections: "Card Information" and "Billing Address".

Card Information

Pay using 


Card number

MM / YY Security Code

First and Last Name

Billing Address

Zip

Secured by 

5. Click **PAY INVOICES** to complete the transaction.

Manage Your Account Information

The “Account” tab is where you can see and update your Account information, including:

- **Autopay setting**

Note: Enrolling in autopay will update existing scheduled Jobs to be paid using autopay.

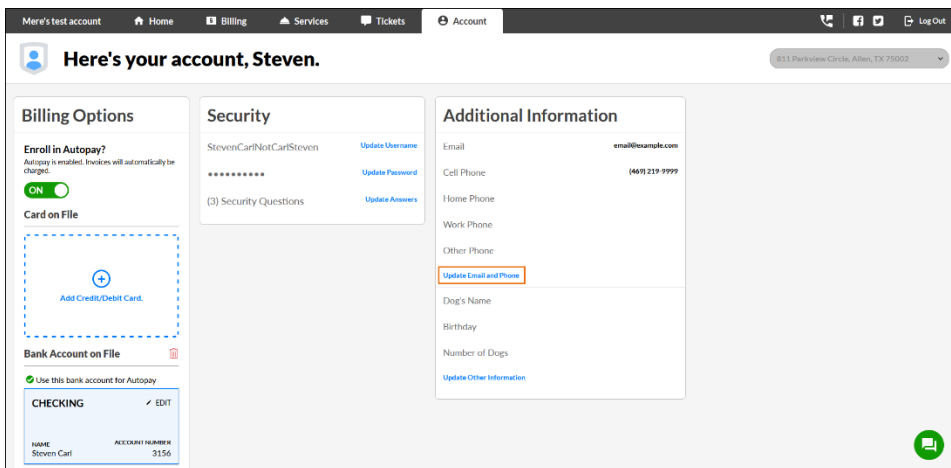
- **Contact information** like username, password, security questions, email, and phone numbers.

The “Additional Information” panel shows the email and phone numbers on file for your account.

- **Custom Fields**, if any are provided.

To make changes, follow these steps:

1. Click the “Account” tab from the toolbar at the top of the screen.
2. On the **Additional Information** panel, click **Update Email Phone**.



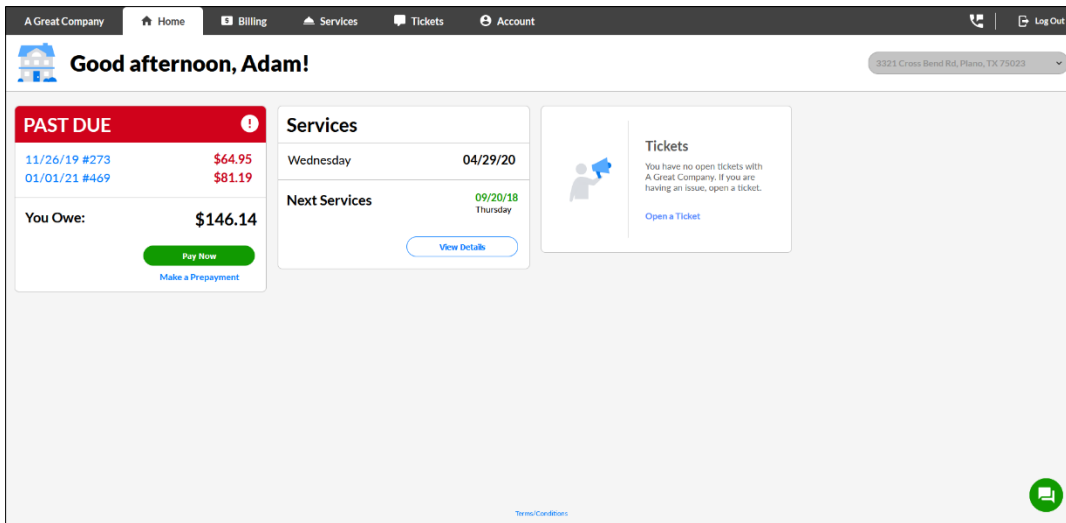
3. On the overlay, update the email address, cell phone, home phone, work phone, or other phone number for your Account.
4. If needed, edit Custom Field values in the same way by clicking the **Update Other Information** link in the “Additional Information” panel.
5. Click **Save**.

Open a Ticket

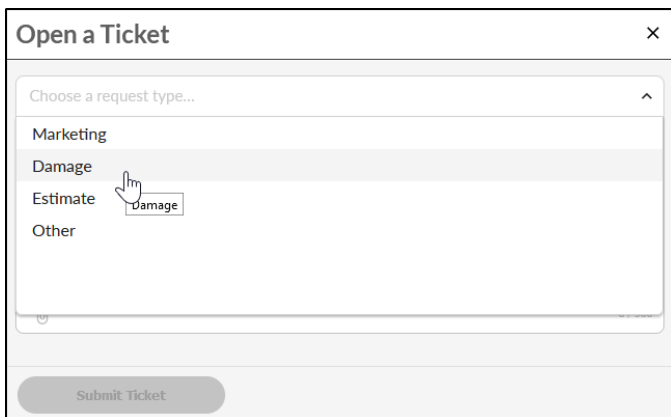
If your service provider gives you permission to do so, you can send a request by submitting a Ticket.

To add a new Ticket, follow these steps:

1. Click the green message icon  in the lower-right corner of the screen:



2. Select a Ticket category from the dropdown list on the **Open a Ticket** overlay:



3. Add text to the body of the Ticket. There is a 500-character limit.

- To add attachments such as photos, click the paper clip icon at the lower left of the text field.

- Click **Submit Ticket**.

After you submit it, the Ticket will appear on the home page under **Open Tickets**:

You can also see it on the “Tickets” tab:

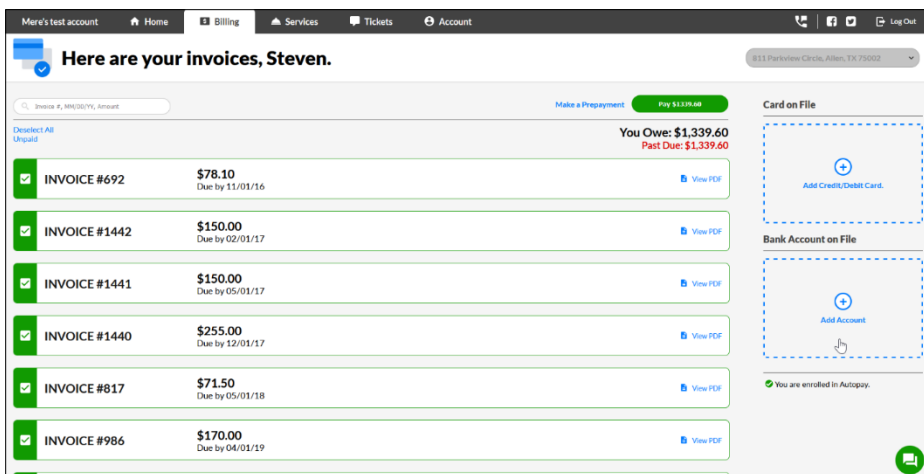
Set Up Payments with ACH

In order to pay with an ACH payment, which is a direct withdrawal from your bank account, you must add your own bank account information to ensure security of your personal information. Follow the steps in this section to set up and make ACH payments.

Enter Your Bank Account Information

The first step is to set up your Client Portal account with your bank information:

1. Click the “Billing” tab in the navigation bar at the top of the screen.
2. Click the **Add Account** link in the column on the right side of the screen:



3. Enter your personal information on the **Add Bank Account** overlay, including **Account type**, **Name on account**, **Routing number**, **Account number**, and **ACH payment description**.

Add Bank Account

ACH Information

Account type

Name on account

Routing number

Account number

ACH payment description

I agree to the ACH Terms and Conditions and authorize the ACH Payment

Save Card

Secured by CLEARRENT

4. Check the box to agree to the ACH Terms and Conditions.
5. Click **Save Card**.

Remove or Update Bank Account Information

Once your bank account is saved, you'll see it listed on the right side of the "Billing" tab:

The screenshot shows the 'Billing' tab in the Client Portal. At the top, it says 'Here are your invoices, Steven.' and 'You Owe: \$1,339.60' with 'Past Due: \$1,339.60'. Below this is a list of five invoices:

Invoice #	Amount	Due Date	Action
INVOICE #692	\$78.10	Due by 11/01/16	View PDF
INVOICE #1442	\$150.00	Due by 02/01/17	View PDF
INVOICE #1441	\$150.00	Due by 05/01/17	View PDF
INVOICE #1440	\$255.00	Due by 12/01/17	View PDF
INVOICE #817	\$71.50	Due by 05/01/18	View PDF

On the right side, there is a 'Card on File' section with a dashed box and a plus icon, and a 'Bank Account on File' section. The 'Bank Account on File' section shows a 'CHECKING' account with the name 'Steven Carl' and account number '3315'. A red trash can icon is visible next to the account name, indicating it can be removed.

If you need to change or remove the bank account on file, just click the red trash can icon to remove the existing account.

Make an ACH Payment

When you start to make a Payment from anywhere in the Client Portal or Manage Service app, you will see the bank account listed as a saved payment method for easy checkout:

The screenshot shows the 'Make a Payment (1 Invoices)' dialog box. It has two main sections:

- 1. Payment Method**: This section shows two options: 'CHECKING' (selected) and 'CARD'. The 'CHECKING' option displays 'BANK ACCOUNT ON FILE: CHECKING ending in 3315' and 'NAME ON BANK ACCOUNT: Steven Carl'. The 'CARD' option has a button that says 'Add a Credit/Debit Card'.
- 2. Review Invoices to be Paid**: This section shows a list of invoices to be paid: 'INVOICE #692' for '\$78.10'. There is a red dot next to the amount and a 'Remove' link. Below this list is a 'PAY INVOICES' button and a 'TOTAL: \$78.10' display. A 'Terms/Conditions' link is also present.

1. Select the Payment Method of **CHECKING**.
2. Click **PAY INVOICES**.

The Manage Service App

The SA Manage Service app lets you quickly and easily manage your Client Portal account from anywhere. You can pay off invoices, and if you have permissions, you can make prepayments and create Tickets. This section shows you how to download and use the app.

Download the App

1. In your app store, search “SA Manage Service” and download the app to your device of choice.
2. Use the same login credentials that you use for the Client Portal.
3. Optionally, enable Face ID, so you don’t have to use a username and password to log in every time.

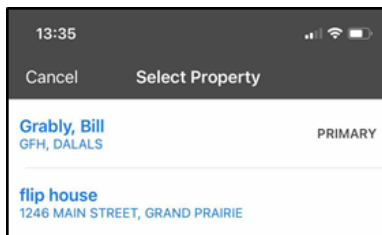
View Your Balance and Upcoming Service in the App

When you log into the app, the home screen shows basic information about your Account.

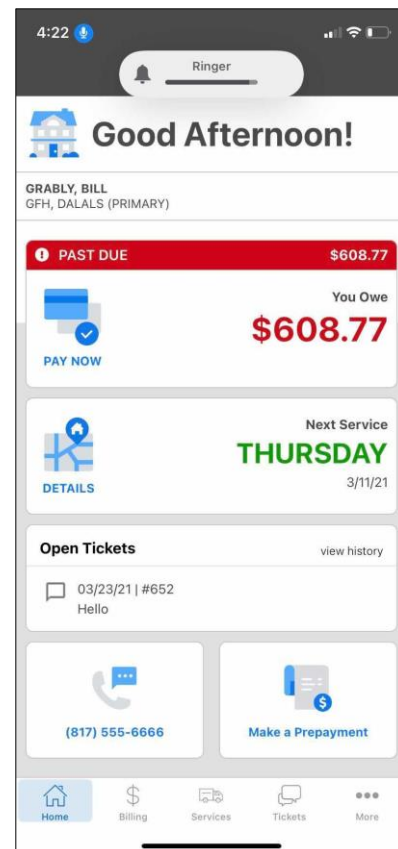
- The **outstanding Invoice** total appears in red.
- Click the **Next Service** card to see more details about your next service.
- The **Open Tickets** section lists your Tickets (if enabled).
- Click the Phone icon at the bottom left to call your service provider.
- Click the **Make a Prepayment** button on the bottom right to make a Prepayment (if enabled).
- Click the buttons at the bottom to navigate to other tabs.

View Related Properties in the App

If you have related properties on your account, the address at the top will be the primary or Parent Account by default.



Tap the address to switch between properties.



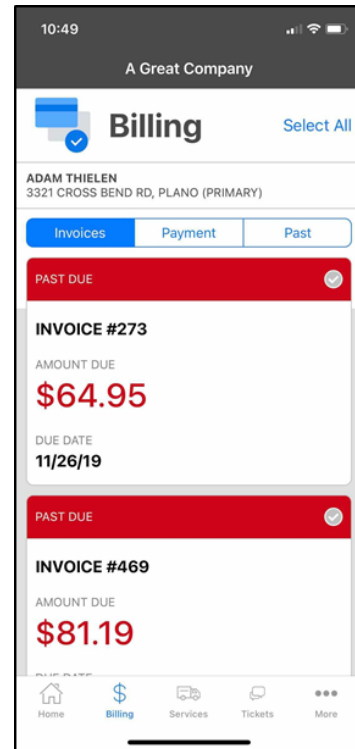
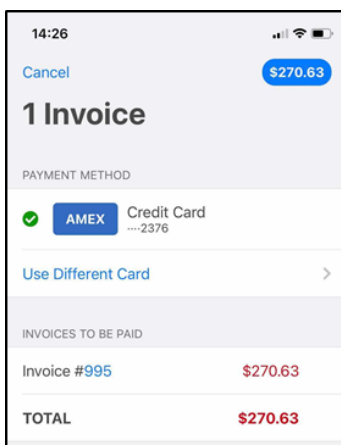
View and Pay Invoices in the App

The “Billing” tab displays current, outstanding Invoices by default with an option to make a Prepayment at the bottom of the list (if enabled).

To pay an Invoice from this screen:

1. Tap the Invoice and then the blue **Pay** button at the bottom of the screen.

This will take you to a screen to confirm the payment method:

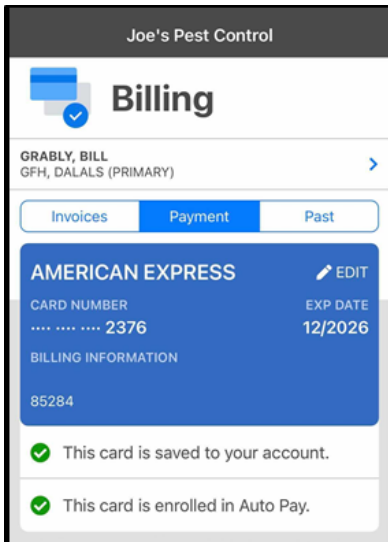


2. Tap the blue amount in the upper right corner of the screen.
3. Tap **Pay** on the confirmation popup to complete the Payment.

The “Billing” tab has two additional tabs to explore: the “Payment” tab and “Past” tab.

Change Your Credit Card Information and Autopay Settings in the App

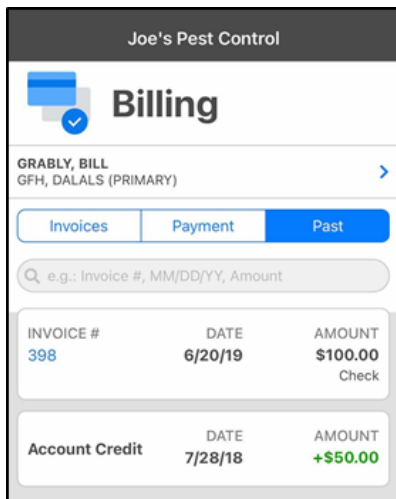
- On the “Payment” tab, you can view or modify the credit card on your account and see if you’re enrolled in Auto Pay.



- On the “More” tab, you can modify the Autopay settings.

See Past Transactions in the App

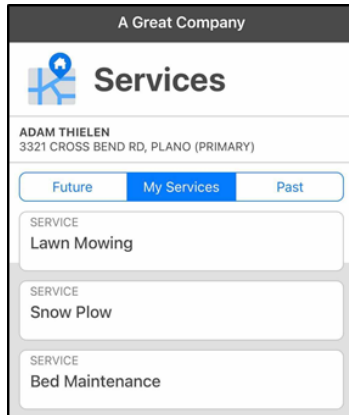
The “Past” tab shows past transactions including paid Invoices, Payments, and Credits.



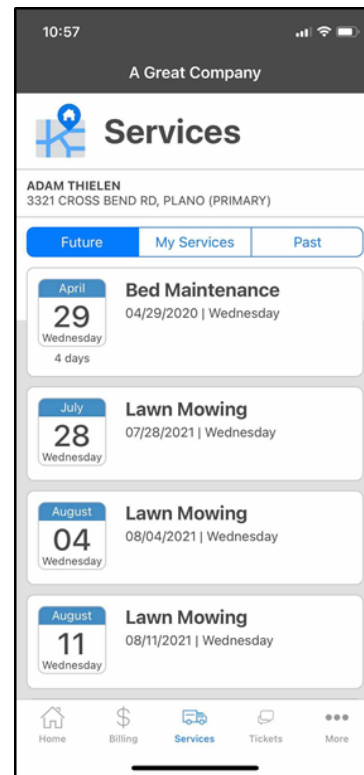
Note: The Manage Service app does not support payments through Authorize.net or Payroc.

See Upcoming Services in the App

Click the tabs at the top of the table to see a list of all Services on the Account (by property):



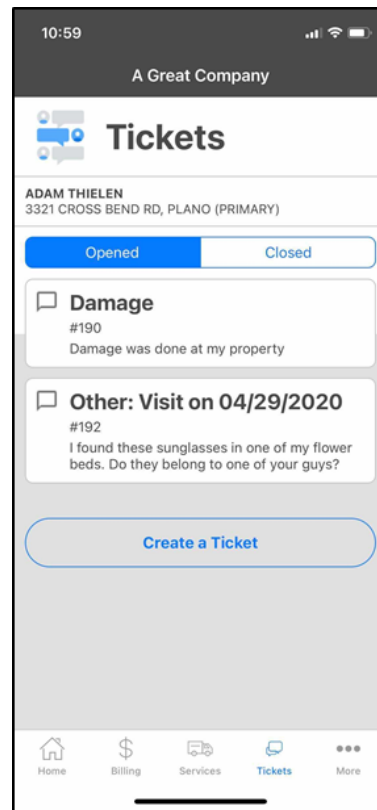
- The “Future” tab shows your upcoming Services.
- The “Past” tab shows a list of Visits that have already been completed.
- You can open a Ticket from any Visit on the “Future” tab or any Job on the “My Services” tab, including change and cancellation requests (if these are enabled).



Open and View Tickets in the App

The “Tickets” tab lets you:

- See lists of open and closed Tickets
- Submit a new Ticket using the button at the bottom of the screen



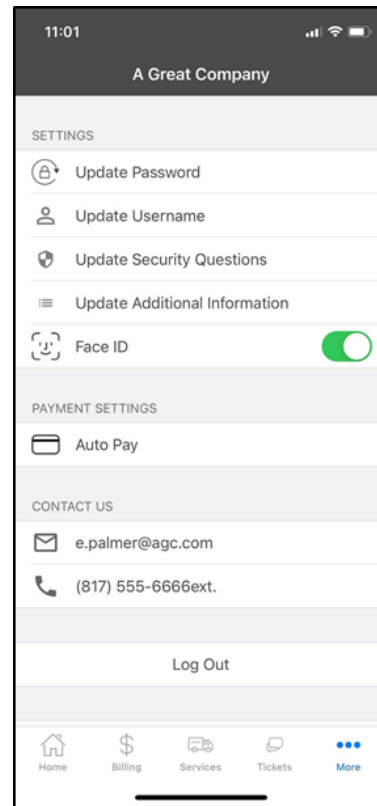
Manage Your Account in the App

The “More” tab is where you can manage your:

- Password
- Username
- Security questions
- Additional information
- Face ID settings
- AutoPay settings

This screen might also show:

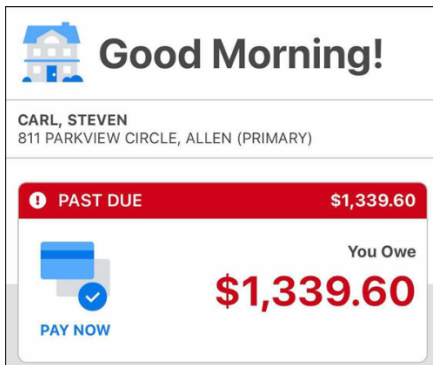
- Social media links for your Service Provider
- Contact information for your Service Provider



Make Payments in the App

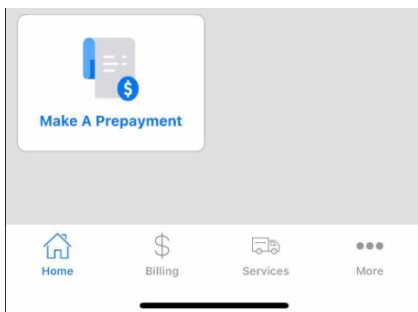
You can make payments from different places within the app.

1. On the “Home” tab, tap the **Past Due** card to pay outstanding Invoices:

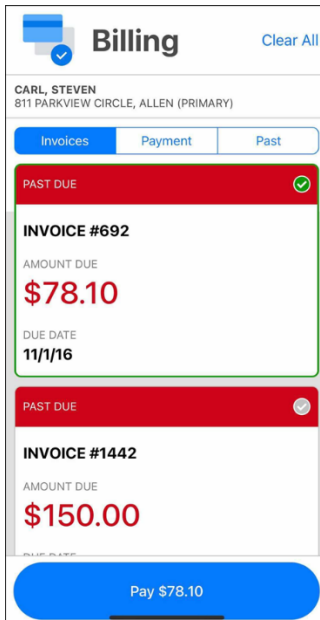


OR

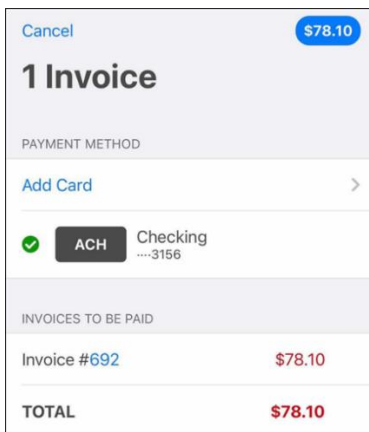
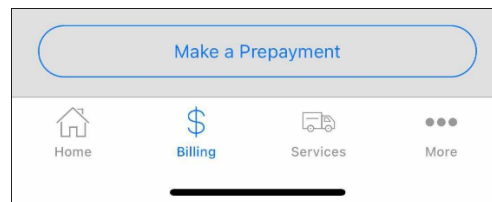
Scroll to the bottom of the same tab to make a Prepayment—a payment that will apply to future Invoices:



2. On the “Billing” tab, tap the Invoices you want to pay to activate the **Pay** button.



3. To make a Prepayment, tap **Make a Prepayment** at the bottom of the “Billing” tab:
4. After you initiate the payment, the payment screen looks like this:



Any credit cards or bank accounts on file will display, and the top one will be auto-selected. If there are no payment methods on file, you have the option to add your credit card information.

5. Tap the blue total in the top right corner to complete the payment.

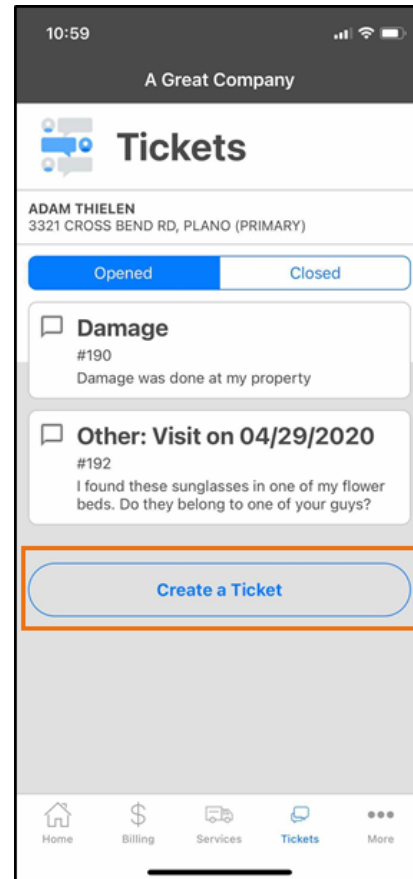
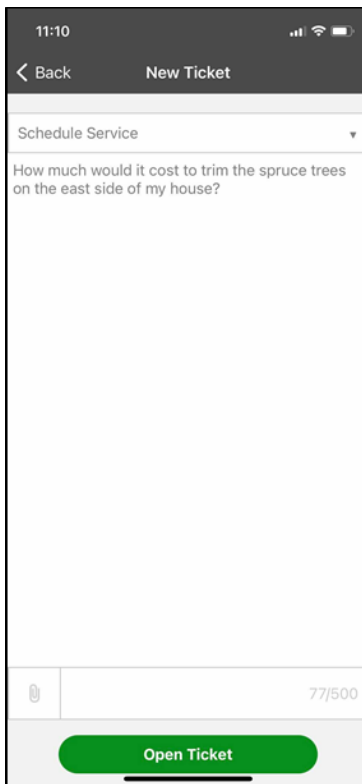
6. Prepayments have one additional step: enter the amount of the prepayment.

Cancel	\$500.00
PAYMENT METHOD	
Add Card >	
<input checked="" type="checkbox"/>	ACH Checking ...3156
AMOUNT TO PREPAY	
\$500.00	
TO BE PAID	
TOTAL	\$500.00

Submit a Ticket in the App

If you have permissions to do so, you can submit Tickets directly from the “Tickets” tab. To submit a Ticket:

1. Tap the “Tickets” option in the toolbar at the bottom of the app.
2. Click **Create a Ticket** below the list of open Tickets.
3. Select a Ticket Category in the **Request type** field.
4. Type the details of the Ticket into the body, using 500 characters or less.
5. Click the paperclip icon to add an attachment such as a photo, if needed.
6. Click **Open Ticket**.

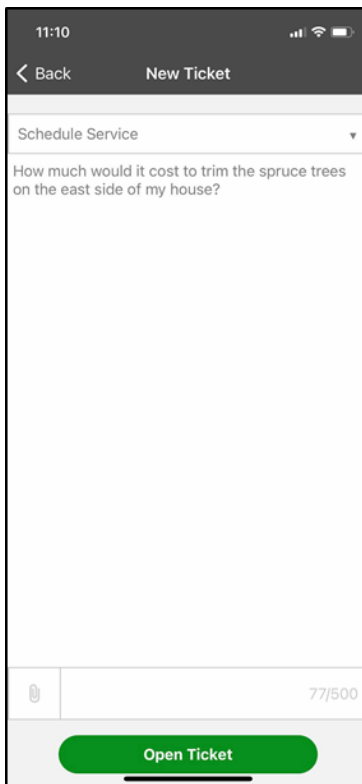


Once the Ticket is submitted, it will appear your list of open Tickets.

Open a Ticket from a Job or Visit

This method of submitting a Ticket is particularly useful if you need to change or cancel a Service.

1. Tap the “Services” tab in the app.
2. Tap the Visit on the “Future” tab or the Job on the “My Services” tab.
3. Select a Ticket Category in the **Request type** field.
4. Type the details of the Ticket into the body, using 500 characters or less.
5. Click the paperclip icon to add an attachment such as a photo, if needed.
6. Click **Open Ticket**.

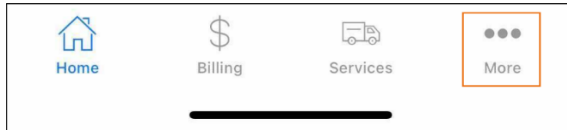


Once the Ticket is submitted, it will appear your list of open Tickets.

Update Your Account Information in the App

You can update some of your Account information in the app by following these steps.

1. Tap the **More** button in the navigation bar at the bottom of the screen:



This takes you to the **Settings** screen shown at right.

2. Tap **Update Additional Information**.
3. On the **Change Information** screen, you can edit your email address, phone numbers, and any Custom Fields that are enabled for you. Just tap a field and type in the update.
4. Scroll down and tap the blue **Save** button at the bottom of the screen:

