Rolling Out the Client *Portal.*

Put your Clients on the portal, from first configuration to a full rollout with an owner for keeping it clean.

APPLIES TO	MODULE	PLATFORM	STATUS
Account managers, operations leads, and administrators	**Client Portal, Clients, Work Orders, Proposals, Invoices**	**Version 3**	**DRAFT v0.1**

Who this is for

Account managers, operations leads, and administrators at the service management company who want their Clients submitting Service Requests, tracking Work Orders, approving Proposals, and viewing Invoices through the Client Portal instead of over the phone. By the end you can configure a Client's portal access, invite their contacts, run the intake flow end to end, and run a rollout that sticks.

The whole flow at a glance

1. **Operations lead** configures what the Client will see and who receives their requests.
2. **Account manager** enables portal access and invites the Client's contacts.
3. **Client contact** submits a Service Request from the portal; the **dispatcher** turns it into a dispatched Work Order.
4. **Account manager** routes Proposals through the portal for Client approval.
5. **Finance** points the Client at their Invoices and payment options in the portal.
6. **Operations lead** runs the rollout: pilot Client, training, announcement, and a named owner for portal data.

Before you start

- The Client and their Sites must already exist in your account. See "How To Add A New Client" in Related articles.
- You need administrator access to Company Settings. Company Settings lives under the Settings gear, then **More Company Settings**.
- Rates, Trades, and Services for the Client should be set up, because the Service Request flow asks the Client to pick a Service.
- Have the Client Portal overview document from Reference documents ready to send with invitations.

STAGE 1

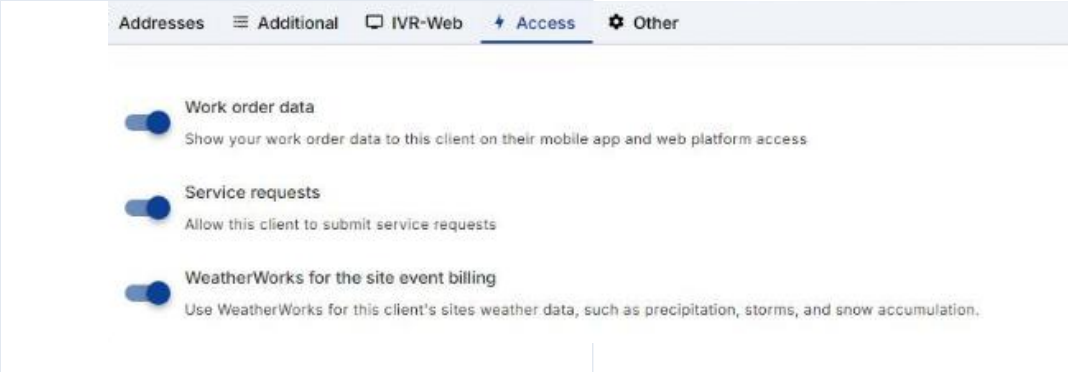
Configure what the Client will see

OWNER Operations lead WHERE *Settings gear > More Company Settings*

Portal visibility is configuration, not default behavior. A Client contact who logs in before you configure access sees an empty portal with no "Service Request" button, which is a bad first impression. Do this stage before anyone is invited.

1 Open the Access tab on the Client profile and enable Work Order visibility

Open the Client record and go to the **Access** tab. Three toggles live there: "Work order data" (show your Work Order data to this Client on their mobile app and web platform access), "Service requests" (allow this Client to submit Service Requests), and "WeatherWorks for the site event billing". Turn on the first two for every portal Client. Then check the company-wide companion setting in Step 4: with "Undispatched Trips" off, a Work Order with no Trip yet is invisible to the Client, and a Client's own brand-new Service Request is exactly that. They submit a request, look for it in the portal, and see nothing, which reads to them as a lost request.



Client profile Access tab with the Work order data, Service requests, and WeatherWorks toggles

2 Route new Service Request emails to your team

In Company Settings, open "Emails" in the left navigation and expand "Settings - Configurable Email Recipients". Add a row, pick a "Role", and optionally add "User Emails". If you select a Role and leave "User Emails" blank, every user with that role receives the email.

SCREENSHOT

Company Settings > Emails > Settings - Configurable Email Recipients, with one Role row filled in

`images/WG-12/s1-step2.png`

3 Set the columns and default views the Client's roles will see

Portal columns and filters are configurable per role or per user. Decide whether site-level users get a reduced column set and whether admins get the full view, then set default filters so the Client does not build their own from scratch

`VERIFY: menu path for configuring portal roles and default column layouts`.

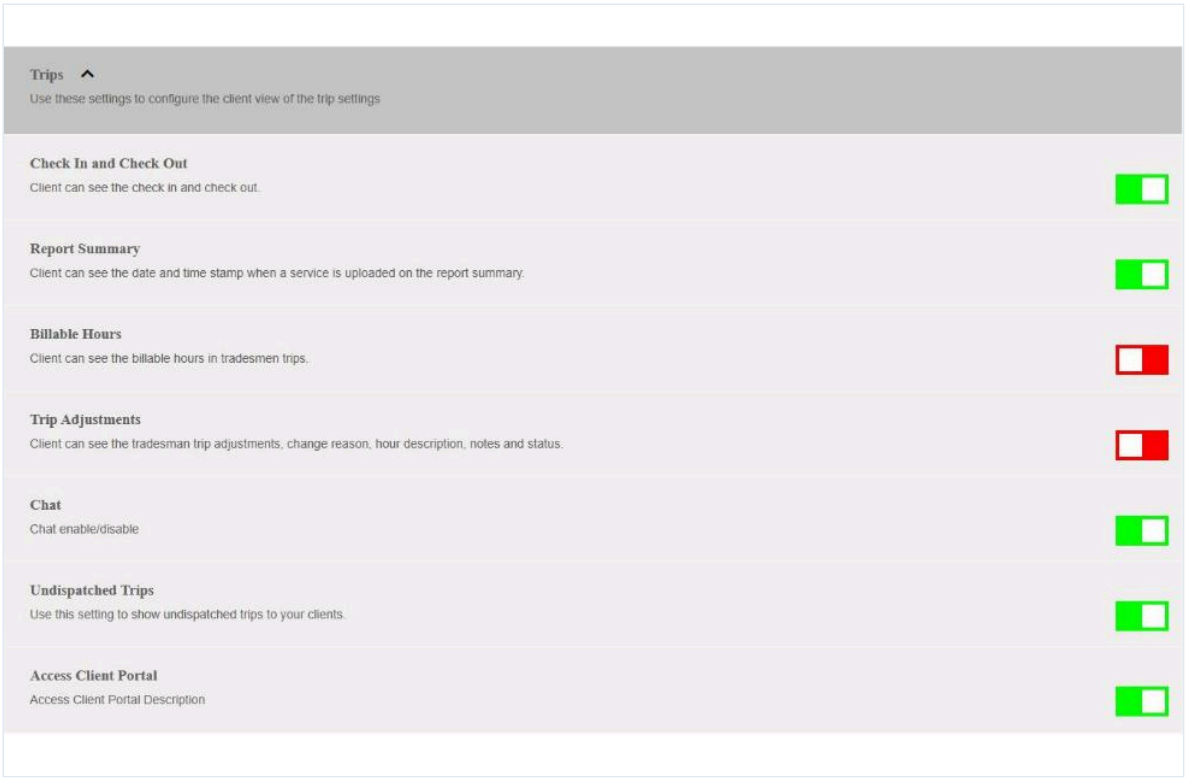
SCREENSHOT

portal Work Order list view with the column configuration control open

`images/WG-12/s1-step3.png`

4 Set the company-wide Client view settings, including Undispatched Trips

Open the Settings gear, choose **More Company Settings**, then **Clients**, and expand **WORK ORDERS**. The "General" section hides fields from the Client's Work Order view (Hide Billing Method, Hide Problem Type, Hide Work Order Report Download) and controls the Work Order Client/Site Contact Email Notification. The "Trips" section controls what Clients see on Trips: Check In and Check Out, Report Summary, Billable Hours, Trip Adjustments, Chat, **Undispatched Trips** ("show undispatched trips to your clients"), and Access Client Portal. Turn Undispatched Trips on before the first Client is invited; it is the setting that makes a fresh Service Request visible to the Client who submitted it. Map colors follow the Trip Status Reference Guide in Reference documents.



More Company Settings, Clients, Work Orders, Trips section with the Undispatched Trips toggle highlighted

STAGE 2

Invite the Client's contacts

OWNER Account manager WHERE *Main Menu > Network > Clients*

Invitations go out only after Stage 1 is done. Start with the two or three people at the Client who will actually submit requests, not the whole org chart.

1 Add contacts to the Client's Sites

Open the Client record and add each contact to the Site they cover. Contacts can be added one at a time or through bulk upload if the Client hands you a master list `VERIFY: bulk upload path for Client contacts`.

SCREENSHOT
Client record, Sites list with the contact panel open on one Site
`images/WG-12/s2-step1.png`

2 Send portal invitations

Send each contact their portal invitation. Invitations can go out by email or by phone number as a text link. Logins persist when you add Sites later, so invite people once and adjust their Site visibility afterward.

SCREENSHOT
contact invitation modal with the email and phone fields visible
`images/WG-12/s2-step2.png`

3 Show the Client admin how to invite their own team

A Client admin can self-serve from their portal: **Network**, then **Employees**, then the circular **+** button. They fill in "Email or Phone", pick a "Role", click **ADD** for each person, then click the blue **SEND INVITATION** button. Hand this task to the Client's admin so you are not the bottleneck for every new hire on their side.

SCREENSHOT
Client Portal > Network > Employees invite modal, SEND INVITATION button highlighted
`images/WG-12/s2-step3.png`

STAGE 3

Run the Service Request intake flow

OWNER Dispatcher WHERE *Client Portal home; Main Menu > Operations > Work Orders*

This is the core loop of the portal. The Client submits a request, it lands as a Work Order on your side, and every status change flows back to their list and map in real time.

1 Have the Client submit a Service Request

In the portal, the Client clicks the blue **Service Request** button in the top left, searches for their Site, and clicks **Continue**. They pick the vendor and Service from dropdowns, describe the problem, attach photos or PDFs with "Add Attachment", review, and click **Send**. The same flow works on the mobile app with the same login.

SCREENSHOT
Client Portal with the Service Request button highlighted in the top left
`images/WG-12/s3-step1.png`

2 Receive the request on your side

The submission creates a Work Order immediately. It shows zero Trips because nothing is dispatched yet, and the recipients you configured in Stage 1 get the email. Everything the Client attached is already on the Work Order.

SCREENSHOT
broker Work Order list showing the new request with a Trip count of zero
`images/WG-12/s3-step2.png`

3 Review and dispatch

Open the Work Order, confirm scope and pricing, add a Trip, and dispatch it to a Vendor. See "How To: Create and Dispatch a Work Order" rather than restating the steps here.

SCREENSHOT
Work Order detail view with the dispatch action highlighted
`images/WG-12/s3-step3.png`

4 Confirm the status flows back to the Client

As soon as you dispatch, the Client's list and map pin change to Scheduled without them refreshing or calling you. Walk the pilot Client through one full request so they see the status change happen live. Pin colors and status meanings match the Trip Status Reference Guide.

SCREENSHOT

Client Portal map view with one pin in Scheduled state, status legend visible

`images/WG-12/s3-step4.png`

GOOD TO KNOW

Notes on a Work Order notify the designated dispatch or account management team even when the Client does not @mention anyone. Tell Clients to write the note and not worry about tagging the right person.

STAGE 4

Route Proposals through the portal

OWNER Account manager **WHERE** *Main Menu > Operations > Proposals*

Work that needs Client sign-off should get approved in the portal, not in an email thread, so the approval is captured on the record.

1 Forward the Proposal to the Client

Create the Client Proposal, or forward a Vendor Proposal with your markup applied. See "How To Forward A Vendor Proposal To Your Client With A Markup" in the knowledge base for the forwarding steps.

SCREENSHOT

Proposal detail view with the send-to-Client action highlighted

`images/WG-12/s4-step1.png`

2 Have the Client approve it in their portal

The Client goes to **Operations**, then **Proposals**, then the **Received** tab. They open the dropdown on the Proposal, select **Accept**, enter their reasoning, and click the blue **Accept** button. The Proposal status changes to "Accepted". Rejection follows the same path with a reason `VERIFY: exact Reject flow labels on the Client side`.

SCREENSHOT

Client Portal > Operations > Proposals > Received tab, Accept action in the dropdown highlighted

`images/WG-12/s4-step2.png`

3 Convert the accepted Proposal into work

Once accepted, convert the Proposal to a Work Order on your side so the approval, the scope, and the eventual Invoice stay linked.

SCREENSHOT

accepted Proposal with the convert to Work Order action highlighted

`images/WG-12/s4-step3.png`

STAGE 5

Point the Client at Invoices

OWNER Finance WHERE *Client Portal > Invoices*

The portal shows the Client their Invoices with line items traced to verified visits: who was there, when, and what was done. Online payment is available `VERIFY: payment processing availability and setup for your account`.

1 Show the Client their Invoice list

Walk the Client's accounts payable contact through the Invoices area of their portal and how each line item ties back to a completed Trip. The Accounts Receivable video walkthrough in Related articles covers this view.

SCREENSHOT

Client Portal Invoices list with one Invoice open showing line items

`images/WG-12/s5-step1.png`

2 Agree on the payment path

Confirm with the Client whether they will pay through the portal or keep their existing payment process. Either way, the Invoice record in the portal is the shared reference when questions come up.

SCREENSHOT

Invoice detail view with the payment option highlighted

`images/WG-12/s5-step2.png`

STAGE 6

Roll it out and keep it clean

OWNER Operations lead **WHERE** No single screen; this stage is process

Do not announce the portal to every Client at once. Every Client on the portal is one fewer status call, but only while the portal shows the truth. A stale portal is worse than no portal, because a Client who catches the portal being wrong goes back to calling and does not return.

1 Pick one pilot Client

Choose a Client with steady volume and an engaged admin contact. Run Stages 1 through 5 with them for two to three weeks before widening.

SCREENSHOT

not applicable; capture the pilot Client's portal home as the training reference image

`images/WG-12/s6-step1.png`

2 Train the pilot Client live

Run one working session: submit a real request together, dispatch it, and let them watch the status change. Send the Client Portal overview document and the knowledge base links afterward. The in-portal help icon opens support chat and the knowledge base, so show them where it is.

SCREENSHOT

Client Portal help icon and support chat panel open

`images/WG-12/s6-step2.png`

3 Announce to the rest of your Clients

Send the rollout announcement with the Client Portal overview document attached and offer each Client a short training call. Stagger invitations so your team can support each new Client's first requests.

SCREENSHOT

not applicable; capture the announcement email template once drafted

`images/WG-12/s6-step3.png`

4 Name the portal data owner

Assign one named person, not a team, to own portal data quality: statuses current, ETAs real, stale Work Orders closed. If this owner is not named, nobody owns it and the portal decays. Put a weekly fifteen-minute review of open portal-visible Work Orders on their calendar.

SCREENSHOT

not applicable; capture the saved filter for open portal-visible Work Orders

`images/WG-12/s6-step4.png`

> **TIP**
>
> Track status calls from pilot Clients before and after rollout. Falling call volume is the number that proves the portal is working.

Where this usually goes wrong

- The Client logs in and cannot find the Service Request button. The toggles from Stage 1 were never enabled for that Client. Enable them and have the Client refresh; no re-invite is needed.
- New Service Requests sit unseen for hours. No email recipients were configured, so nobody was notified. Set the Role-based recipients in Company Settings and leave "User Emails" blank so the whole role is covered when one person is out.
- The Client's Sites are lumped under one generic headquarters address, so requests come in against the wrong Site and users cannot be mapped to their locations. Split out real Sites and reassign contacts before rollout, using bulk upload for large lists.
- Proposal approvals keep happening over email, so the portal record shows Proposals stuck in Sent. Route approvers to the Received tab in their portal and stop accepting email approvals once the pilot ends.
- The portal goes stale after a strong start. Trips sit in Scheduled after the work is done, and the Client stops trusting the list. This is the data owner's job from Stage 6; if it keeps happening, the owner is not doing the weekly review or was never actually named.

What good looks like

The pilot Client submits requests through the portal without calling first. On your side, each request arrives as a Work Order with attachments already in place, gets dispatched the same day, and the Client watches the pin move from Scheduled to In Progress to Complete on their map without asking anyone. Proposals show Accepted with the approver's reasoning captured, Invoices trace to verified Trips, and the portal data owner's weekly review finds nothing stale. Status call volume from portal Clients is measurably down.

Related articles

- What You Can Do in the UtilizeCore Client Portal
- Client Portal: How To Submit A New Service Request
- How do Client users Accept a Proposal?
- How to enable Service Requests and Work Order view for your Clients
- Client Portal: How to Invite a New Employee to your Network
- Client Portal Video Walkthrough: Accounts Receivable

Reference documents

Branded UtilizeCore documents that pair with this guide, in the Customer Success shared drive under UtilizeCore Knowledge Base.

- UtilizeCore Client Portal. The client-facing overview to send with the rollout announcement.
- Trip Status Reference Guide. The statuses Clients watch on the portal list and map.

SUGGESTED BEST PRACTICE

This guide is the **suggested best practice**, written for the most efficient and most widespread way to run this workflow. Adjust it to fit your company's own workflows. If the product screen and the guide disagree, tell your **Customer Success Manager** so the guide gets corrected for everyone.

UtilizeCore

Need help? Reach out to your Customer Success Manager or support@utilizecore.com

DRAFT REVIEW PANEL (REMOVED ON FINAL BUILD)

Stages	6	**Steps**	20
Screenshots needed	20	**Screenshots placed**	2
VERIFY tags open	4. Each one is a label, path, or behavior the author could not confirm from a source. The technical reviewer resolves every tag by following the step in the live product.		
Sources	Fathom 169593045; KB what-you-can-do-in-the-client-portal; KB client-portal category; KB how-to-configure-email-recipients-for-new-service-requests; Drive Client Portal overview		

Gate	Who	Done when	Initials / date
Technical review	Implementation SME	Every step followed in the live product. Every VERIFY tag resolved or the step rewritten.	
Screenshot pass	Screenshot owner	One image per placeholder, named as shown in each box, customer data removed.	
Editorial review and publish	Evan Smith	Title, voice, terminology, links. Final build run. PDF filed and KB row imported.	