USING THE CUSTOMER PORTAL

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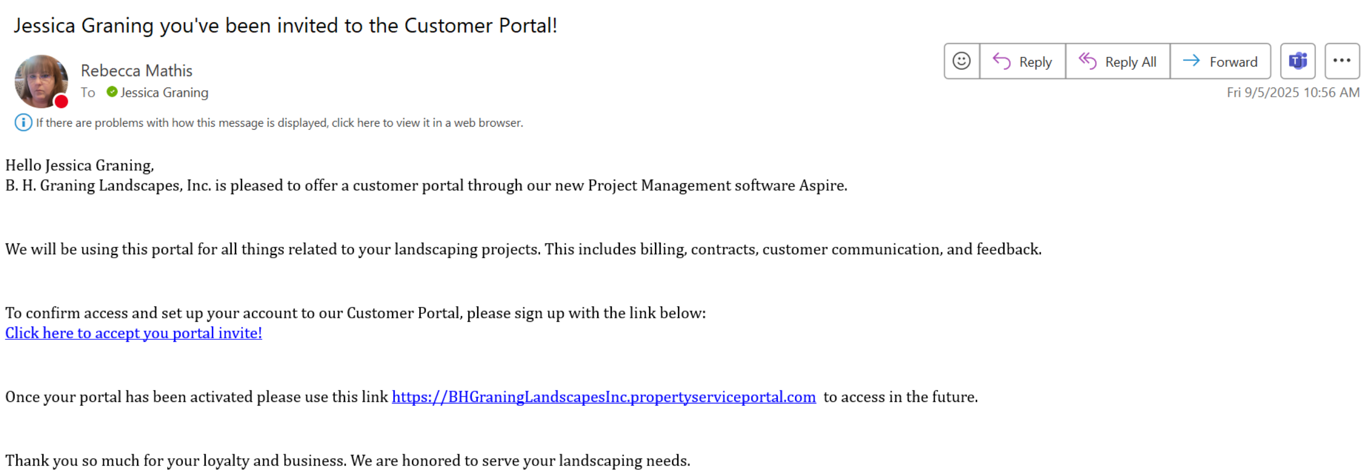
Purpose

Read this helpful step-by-step to learn about some of the features in the B. H. Graning Landscapes, Inc. company portal to help you understand what's available to you as we do business together.

Receiving an Invite to the Customer Portal

Customer Portal Invite links are **valid** for 30 days once they are sent. If 30 days have passed, and you never used your invite link, you'll have to **request** a new *Portal Invitation Email* from us.



Jessica Graning you've been invited to the Customer Portal!

Rebecca Mathis

To Jessica Graning

Reply | Reply All | Forward

Fri 9/5/2025 10:56 AM

If there are problems with how this message is displayed, click here to view it in a web browser.

Hello Jessica Graning,
B. H. Graning Landscapes, Inc. is pleased to offer a customer portal through our new Project Management software Aspire.

We will be using this portal for all things related to your landscaping projects. This includes billing, contracts, customer communication, and feedback.

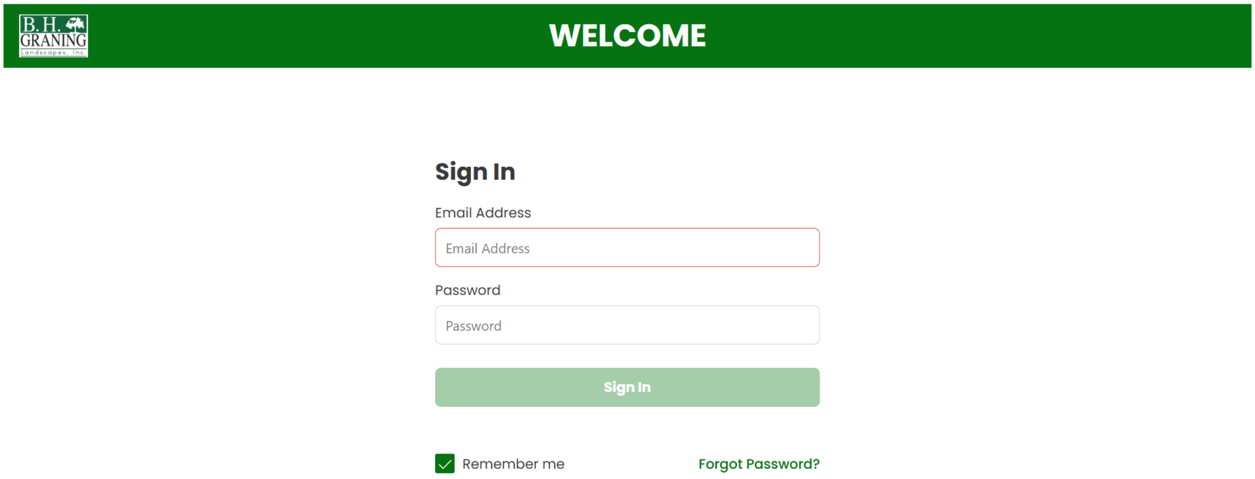
To confirm access and set up your account to our Customer Portal, please sign up with the link below:
Click here to accept you portal invite!

Once your portal has been activated please use this link https://BHGraningLandscapesInc.propertyserviceportal.com to access in the future.

Thank you so much for your loyalty and business. We are honored to serve your landscaping needs.

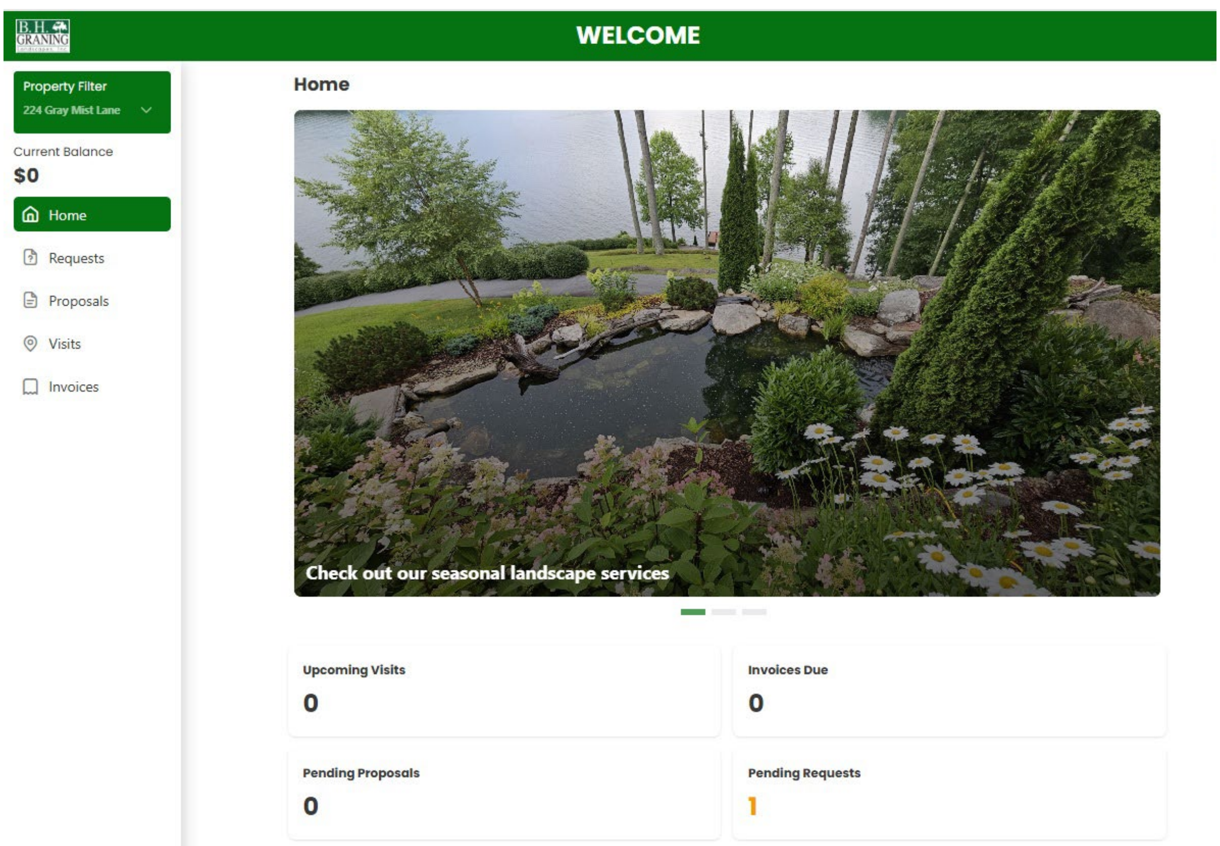
When **accepting** the portal invitation in the email, you'll **set** your password and **bookmark** the URL for the Customer Portal, so you can log in whenever you want to review proposals or invoices.

After your password is **set**, you will be redirected to the login page. You can then **log in** to your portal account for the first time.



Logging Into the Customer Portal

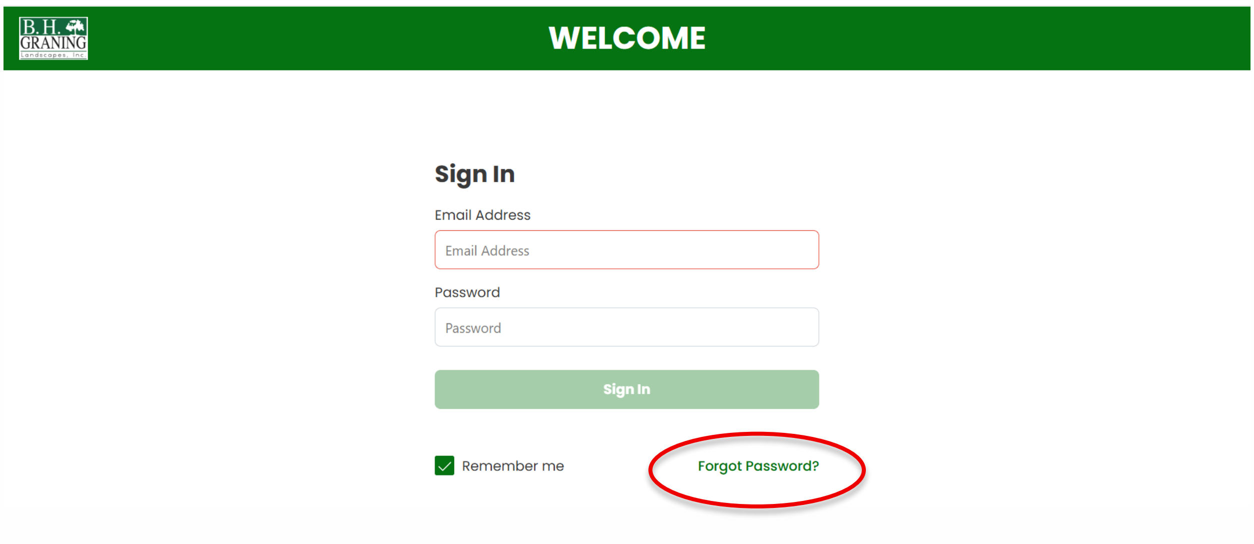
To log into the portal, you will **enter** the email address that you use to communicate with B. H. Graning Landscapes, Inc., and complete with the password that you **created** at the time of sign-up. Once you are logged in, your dashboard will be displayed.



Reset Password

If you cannot remember your password, you can **request** a new password on the login screen by **selecting** *Forgot Password?*

Note: The company that manages your customer portal **cannot see** your passwords; it's up to you to **reset** your password if you do not have access to your old password.



Troubleshooting

If you **click** the link to reset your password for your account and you never receive this email, **please check your Spam folder in your email account!** If you cannot find the password reset email, then you can confirm by phone or email to the company you are doing business with to see if you are *Customer Portal Verified*. This means that you have **accepted** your invite to join the customer portal and have set a password.

If you **select** *Forgot Password,* and your email address is not associated with a *User Account* for the *Customer Portal*, you will see *Invalid Email* displayed on the *Customer Portal* screen. You would have to **accept** the initial portal invite *first*, and then, **set** a password.

Features of Your Customer Portal

Once you **accept** your invite to **create** a new account to access the *Customer Portal*, there are many things you can do once you log in. We will go over the self-serve features that the customer portal offers so you can understand what you can do on your own:

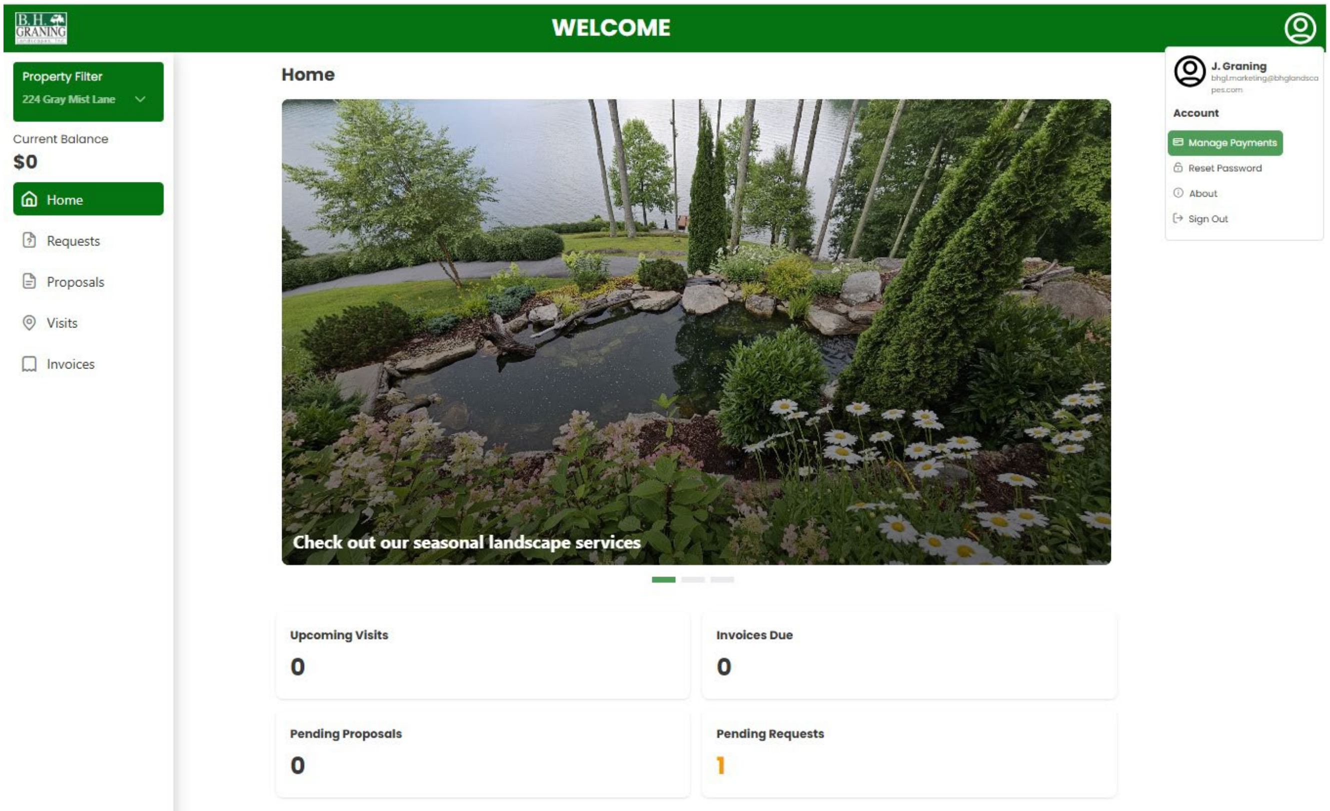
- **Manage** payment methods
- **View** upcoming visits
- **View** and **sign** *Proposals*
- **View** and **pay** *Invoices*
- **Review** and **comment** on *Requests*
- **Manage** multiple properties

Profile Icon Controls

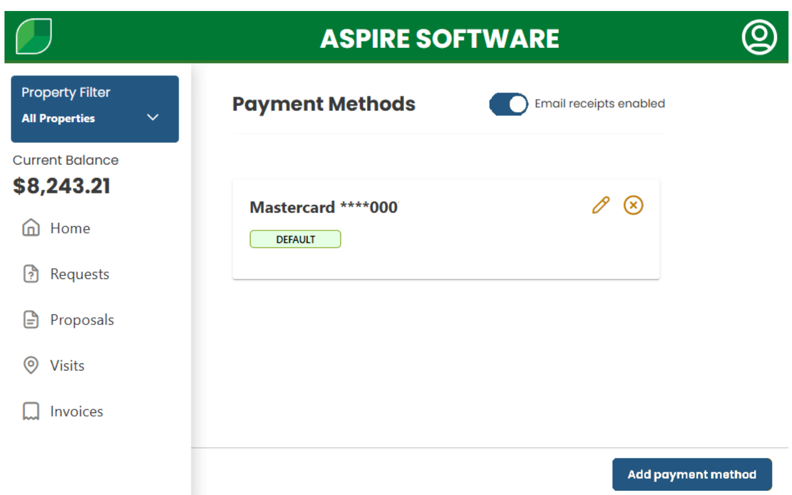
Under the profile icon, you can set payment methods, reset your password for the portal, and sign out of your account.

Managing Payment Methods

You have the option to add a new payment method, edit or delete existing methods, and set a default payment method for your transactions under *Manage Payments*.

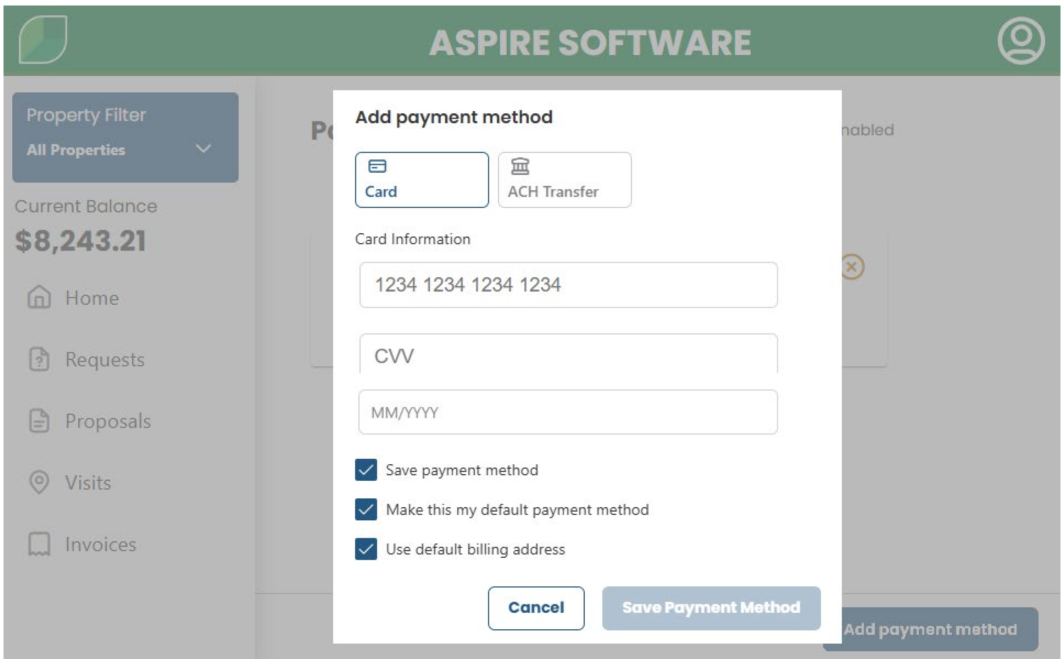


Existing payment methods on file for your account will appear here, or you can **click** the *Add Payment Method* button to add a new source.



Adding a Card Payment Method

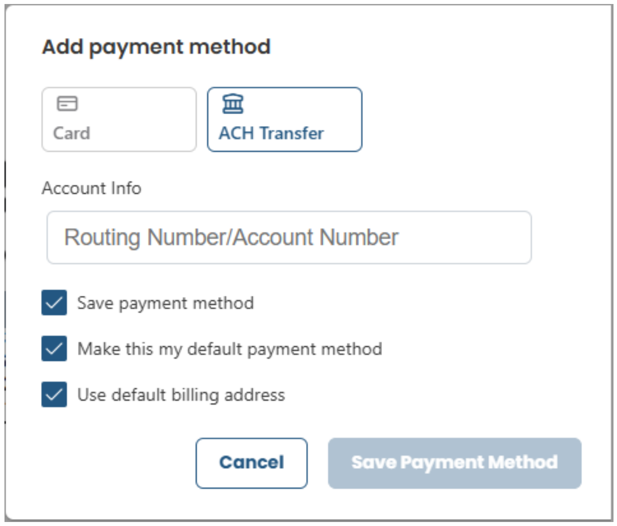
If you can add Card payments in the *Customer Portal*, you will see the option to add cards to your account and save them for future use!



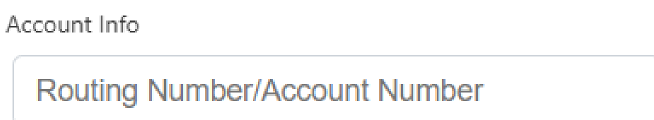
ACH Payment Method

🧠If you can add *ACH Transfer* accounts, the ACH *Transfer* option will appear for you to add a source to.

To **add** a new ACH payment method, **select** the *Add Payment Method* button, then under **choose** *ACH Transfer.*



- In the *Routing/Account Number* field, the customer would enter their bank information separating the routing and the account number with a "/".



⚠ No spaces or special characters besides "/" should be used in this box.

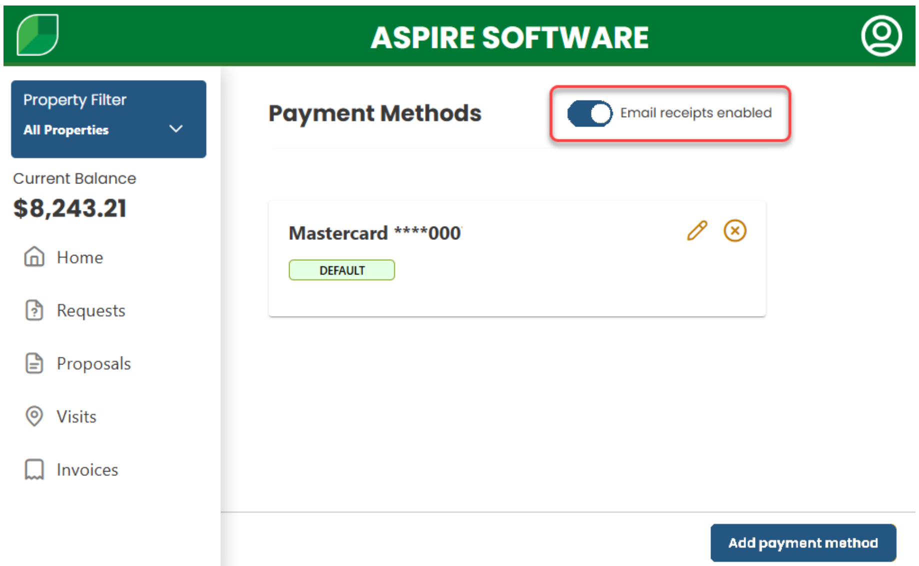
- After **entering** the bank information, you can decide to make this a default payment method by checking the *Make this my default payment method* checkbox.

- When all information is entered, **select** *Save Payment Method*.

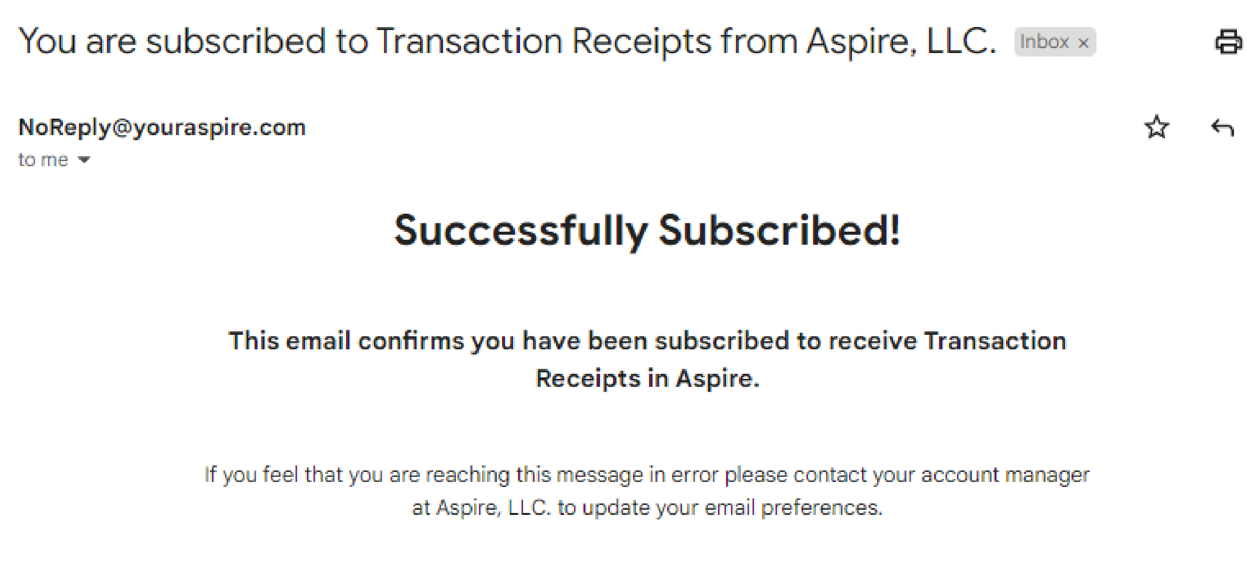
Subscribing to Electronic Receipts in the Customer Portal

Regardless of if you have added *ACH* or *Card* payment methods to your account, you can opt into getting transaction receipts emailed to you when a payment is made.

You can turn the toggle button on to enable emailed payment receipts:



Here is an example email of what you'd **receive** when turning this button on for *Electronic Receipts*:


You are subscribed to Transaction Receipts from Aspire, LLC. Inbox

NoReply@youraspire.com
to me

Successfully Subscribed!

This email confirms you have been subscribed to receive Transaction Receipts in Aspire.

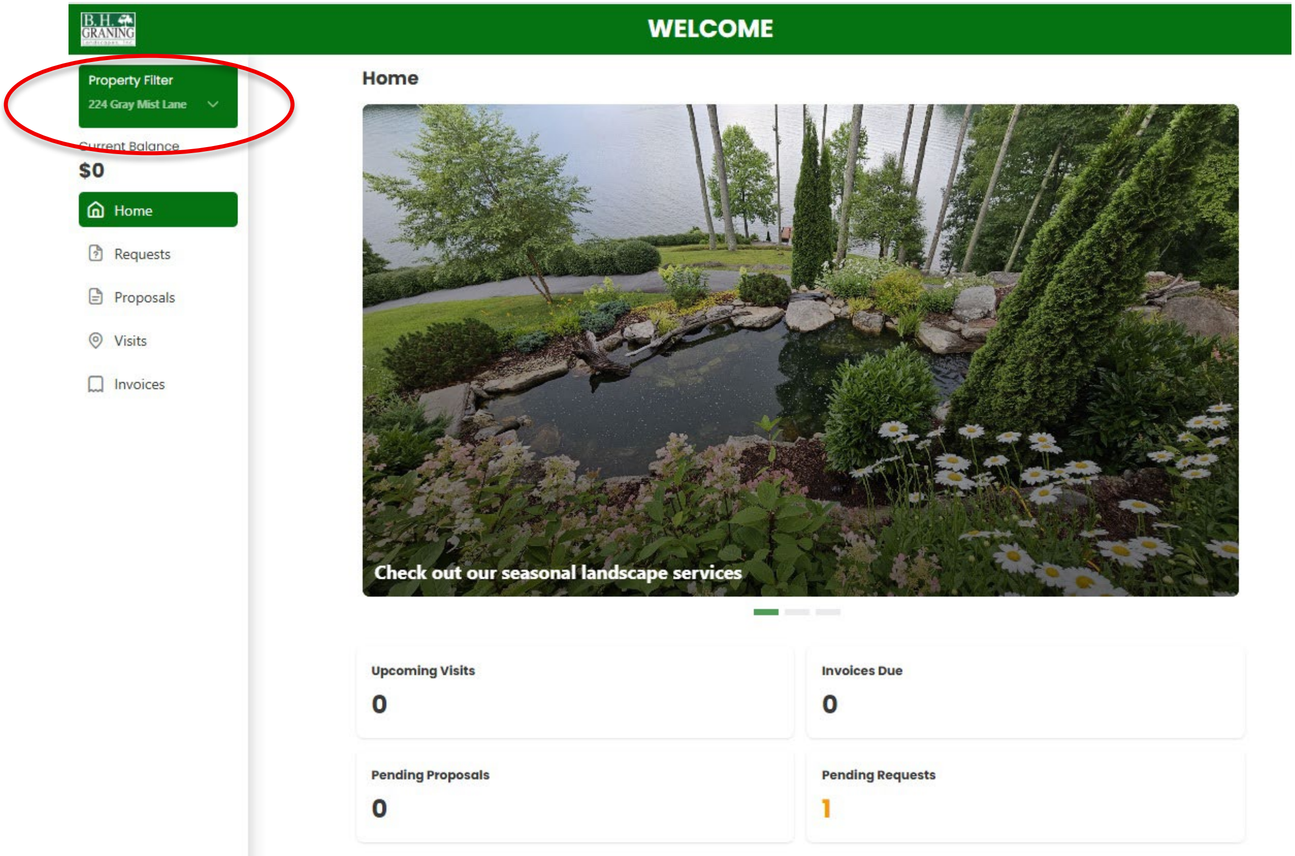
If you feel that you are reaching this message in error please contact your account manager at Aspire, LLC. to update your email preferences.

- Now, when a payment is **made** with the payment source on file, you would automatically get a receipt for the amount paid.

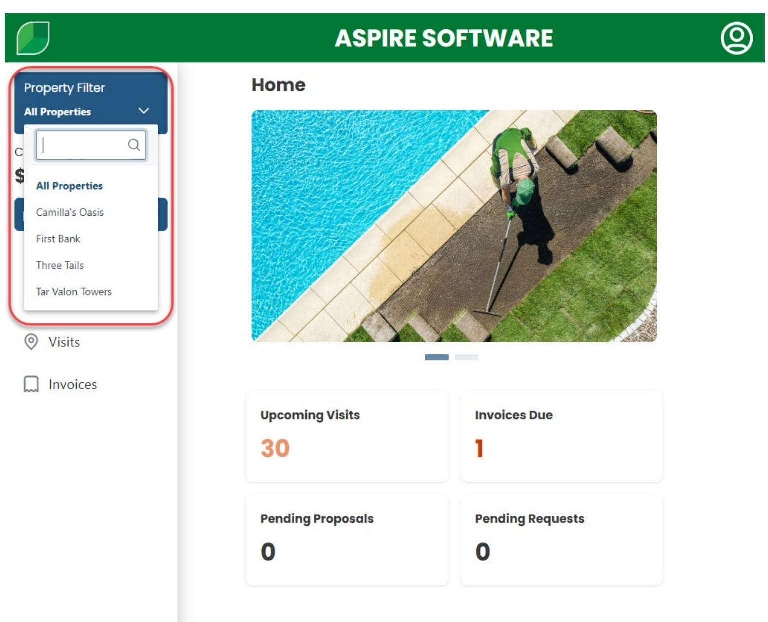
Understanding the Customer Portal Side Menu

Reviewing the Property Filter

The property filter helps you filter portal content and allows you to make the Customer Portal your own! By default, all of your properties will be selected, but if you want to view one property's data, or even a group of properties, you can click the dropdown and select them from the list!

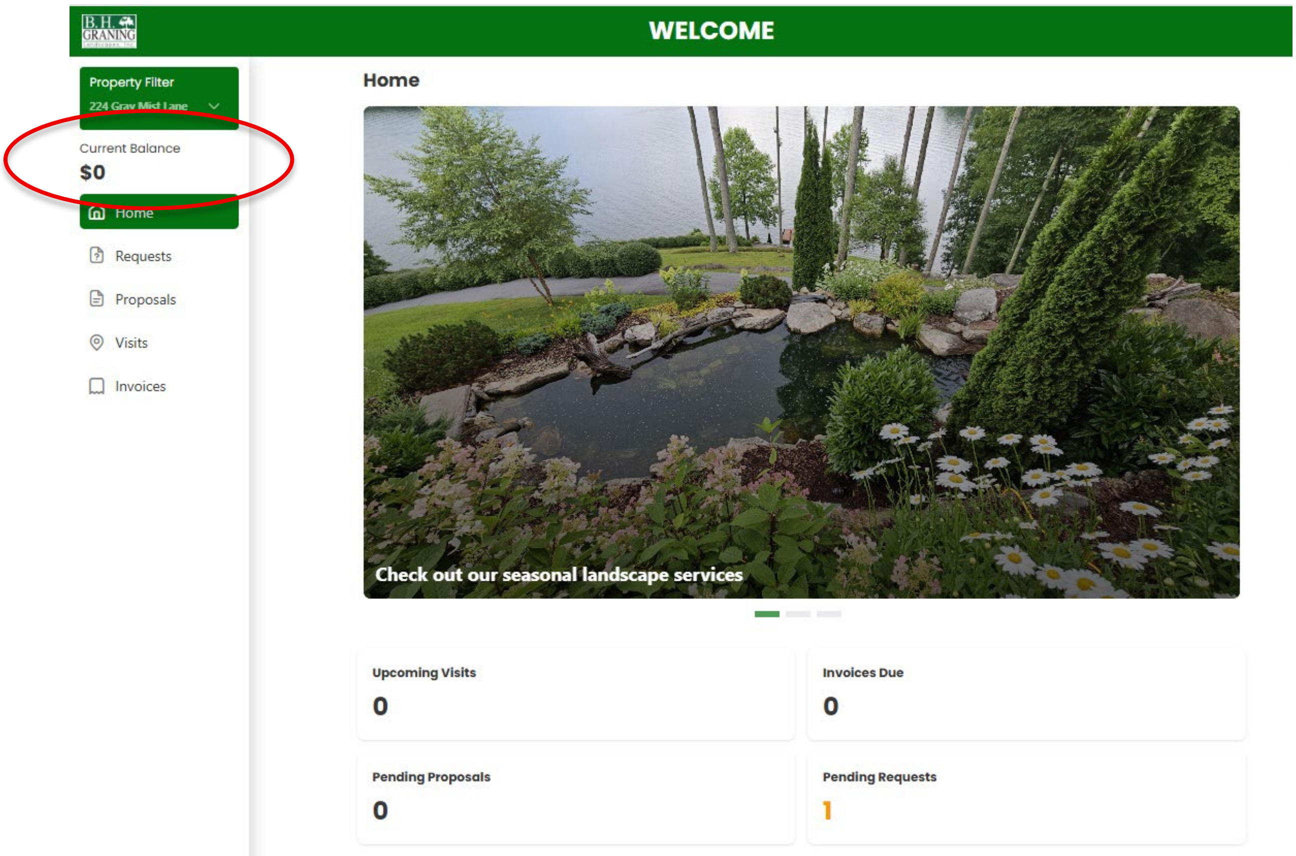


Note: Using the multi-select option updates the data displayed for each property across the entire customer portal.



Current Balance

The current balance amount displays the sum of all due invoices for properties selected by the property filter.



💡The *Current Balance* amount include any credits that may have been applied to your invoices.

Viewing and Signing Proposals

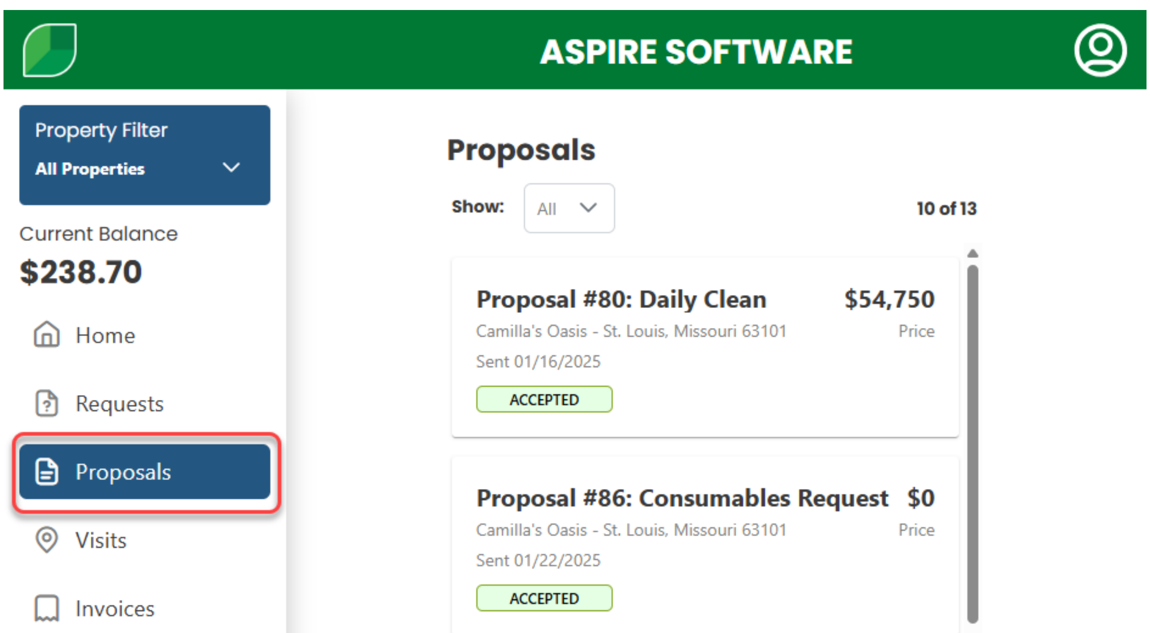
Note: If you do not **see** *Proposals* displayed in the customer portal, **you can skip this section.**

All contacts tied to the property can **view** *Proposals*, but only *Primary* and *Billing* can **sign** *Proposals*.

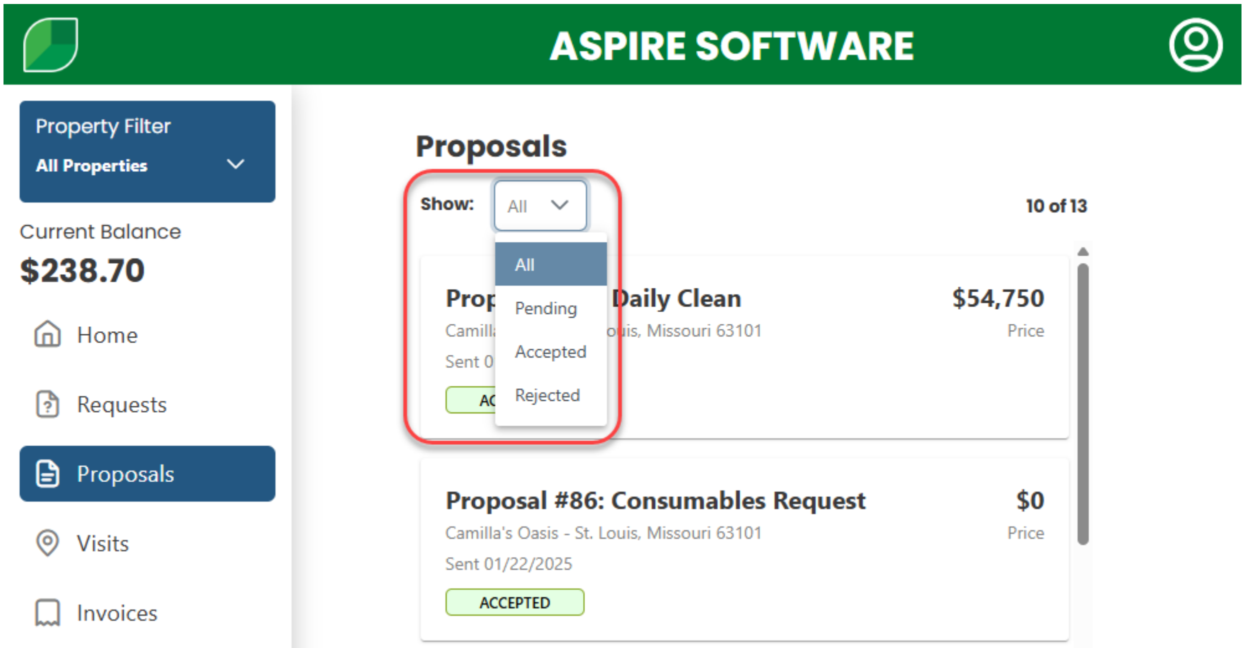
If you **receive** a *Proposal* for work at your property, you can accept and **sign** inside your customer portal account with the use of an *Electronic Signature*!

Viewing a Proposal

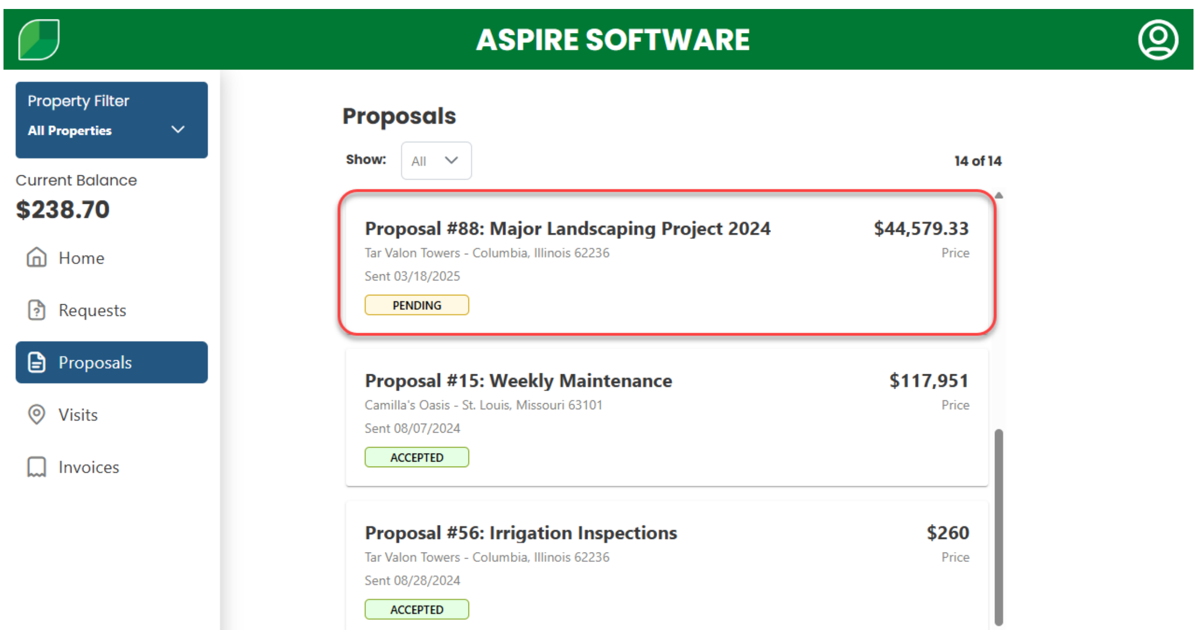
View Proposals by clicking the *Proposals* section of the side menu.



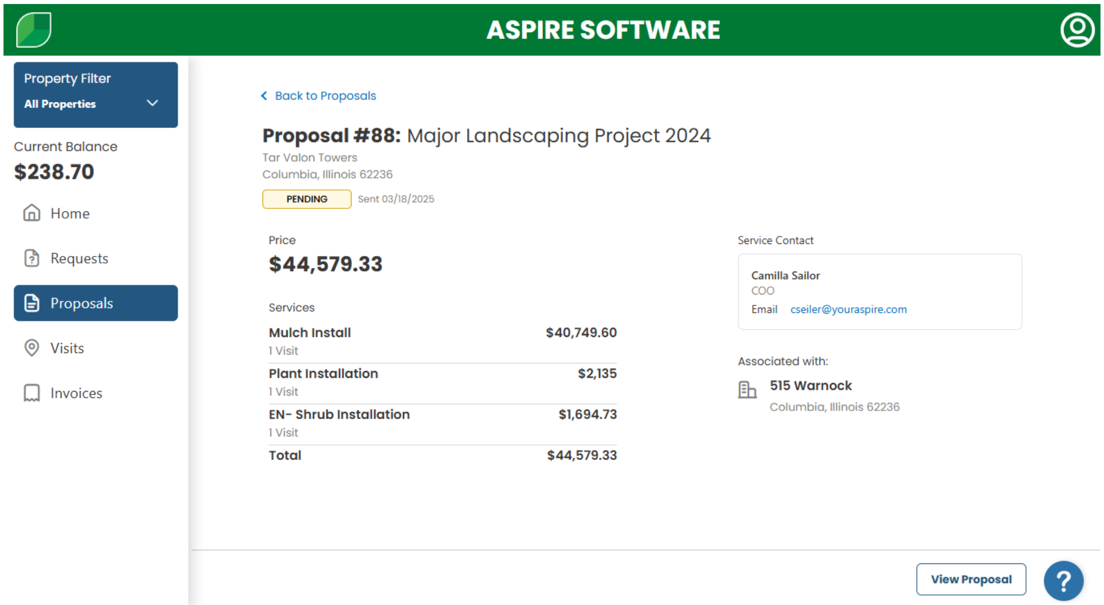
You can use the *Show* dropdown to review *All, Pending Accepted, or Rejected Proposals* on this screen.



To review the proposal in more detail, **click** on any proposal from the *Proposals* list:



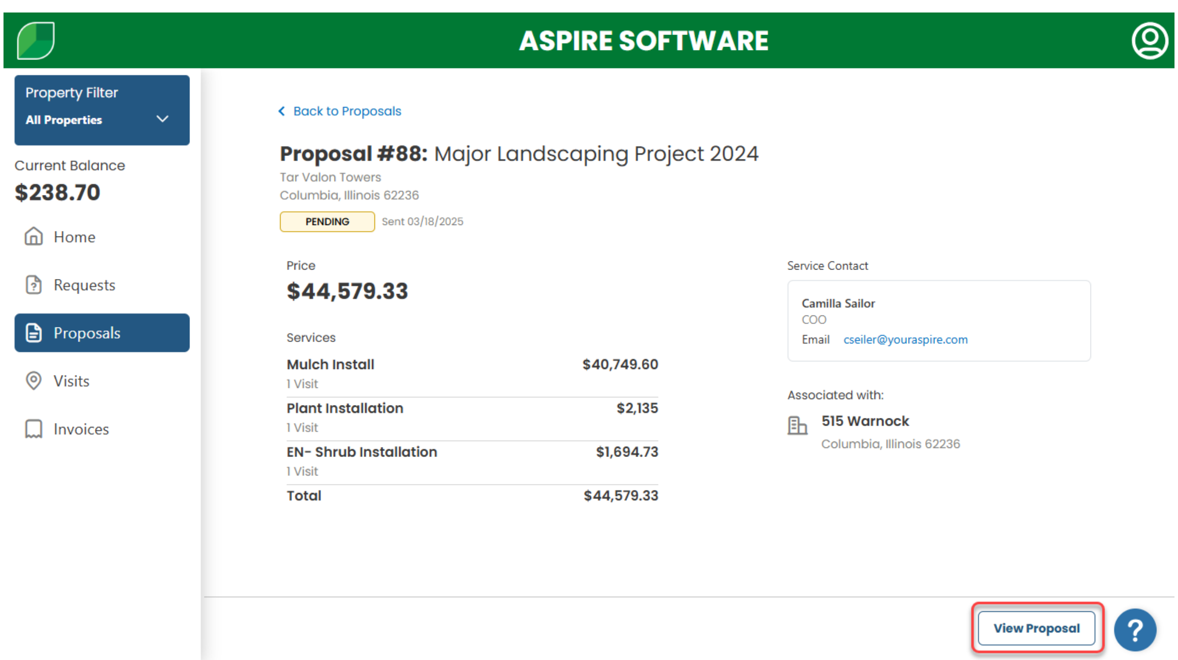
The proposals detail screen shows the proposal in a webpage format which is helpful for you if you plan to use a mobile device to review this information.

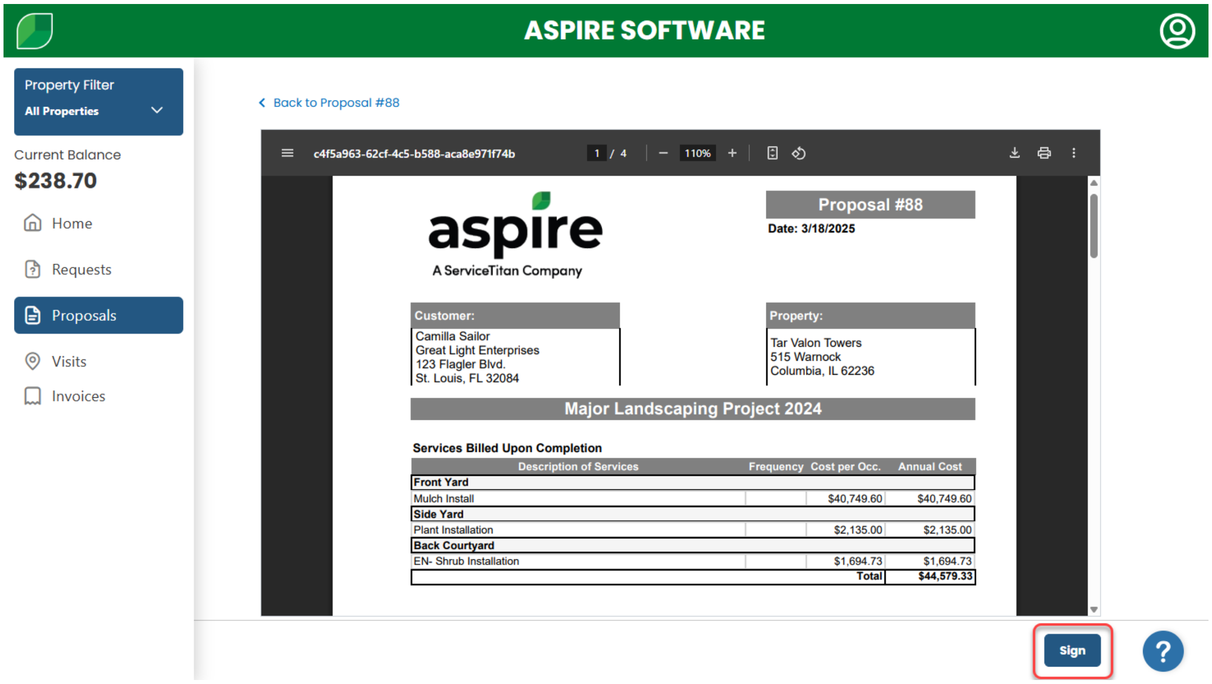


Signing a Proposal

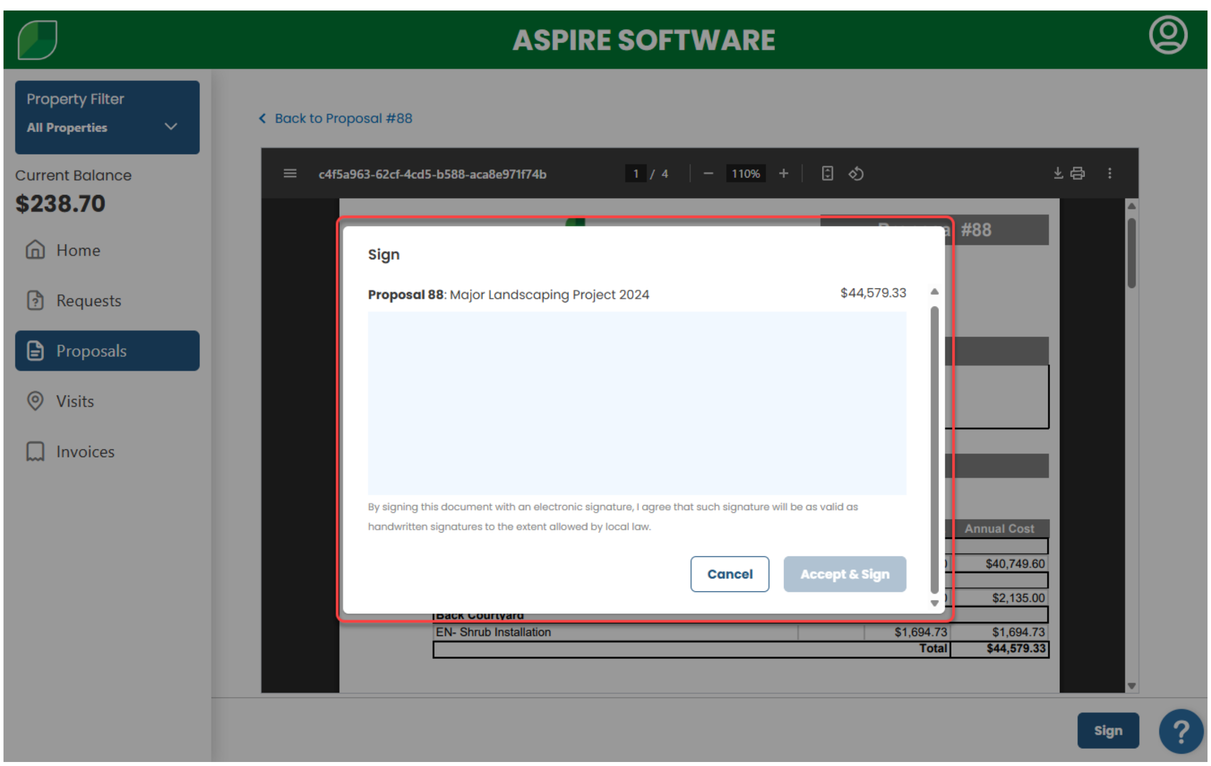
Only *Primary* and *Billing Contacts* tied to the property can sign the *Proposal.*

When you are ready to sign your proposal, **click** on the *View Proposal* button:





This opens the proposal in PDF format. Next, **click** the *Sign* button to pull up the *Electronic Signature* window.

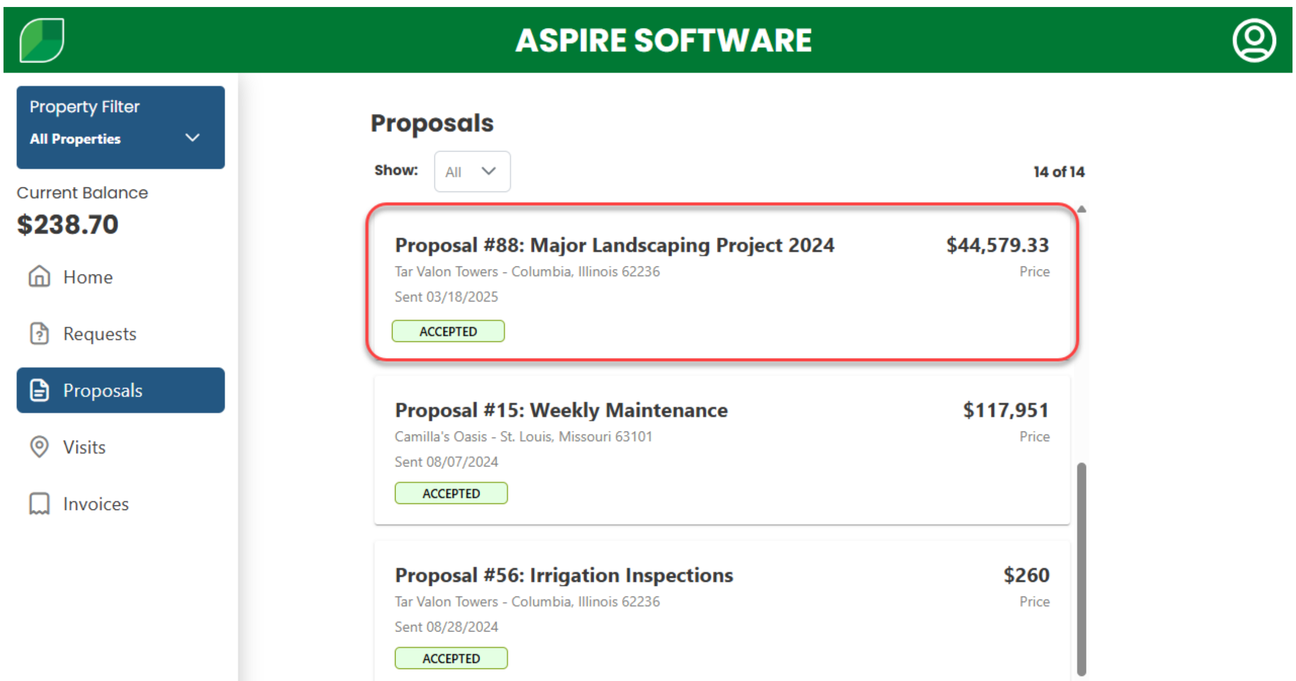


💡If the proposal has *Optional Services* estimated, they will **appear** in this window with checkmarks.

You can choose to check them at that time and add the additional cost to the approved proposal amount! The *Proposal Screen* will also be updated to show which *Optional Services* you have selected.

Once the customer **signs** the proposal, the proposal status will **update** from *Pending* to *Accepted*.

The *Sales Representative* tied to the opportunity will be **notified** via email that the proposal has been signed in the customer portal. The *Sales Representative* will also be notified of the signature on any Change Orders that were reproposed to you!

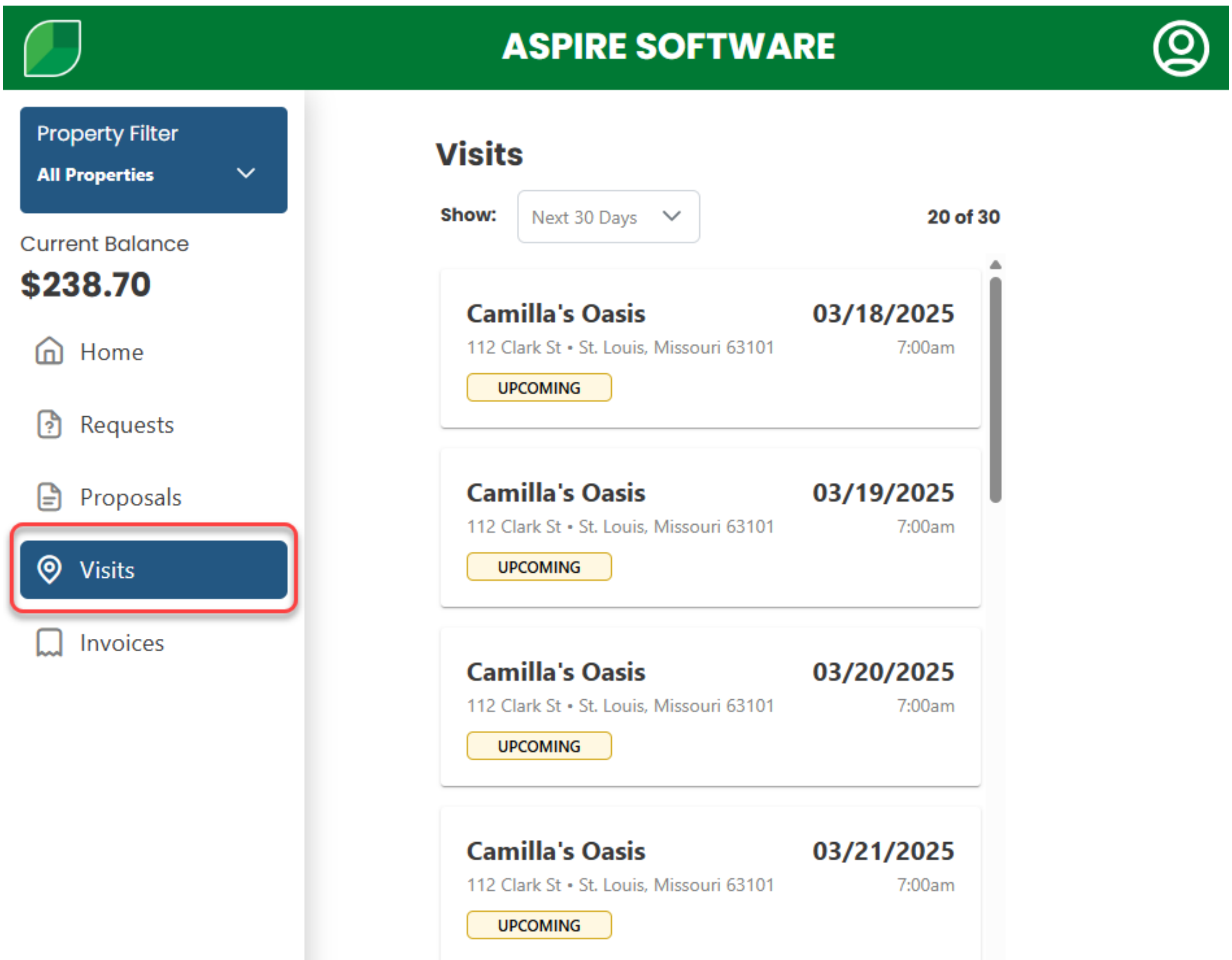


The Visits Section

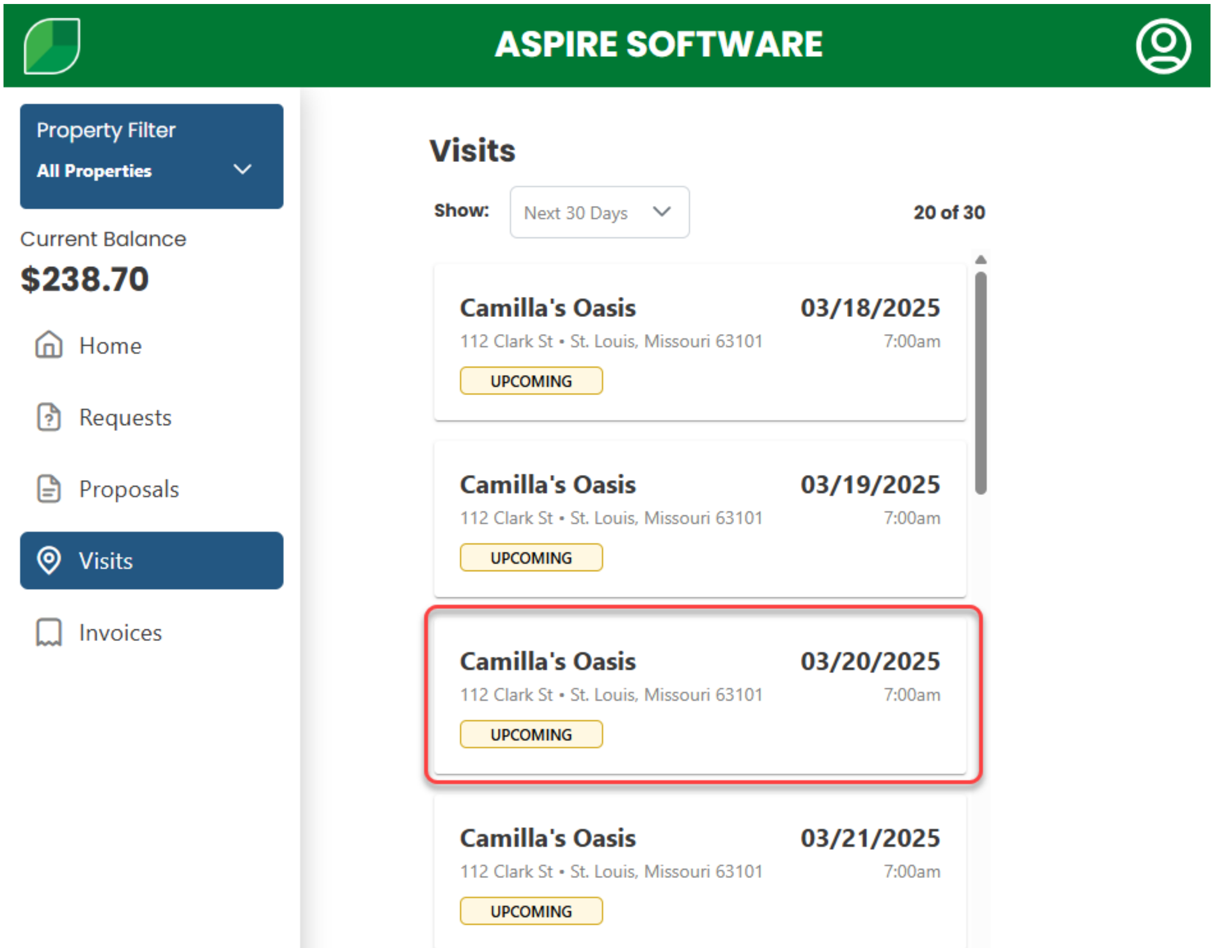
📌 **Note:** If you do not see *Visits* **displayed** in the customer portal, you can **skip this section**.

Viewing Visits

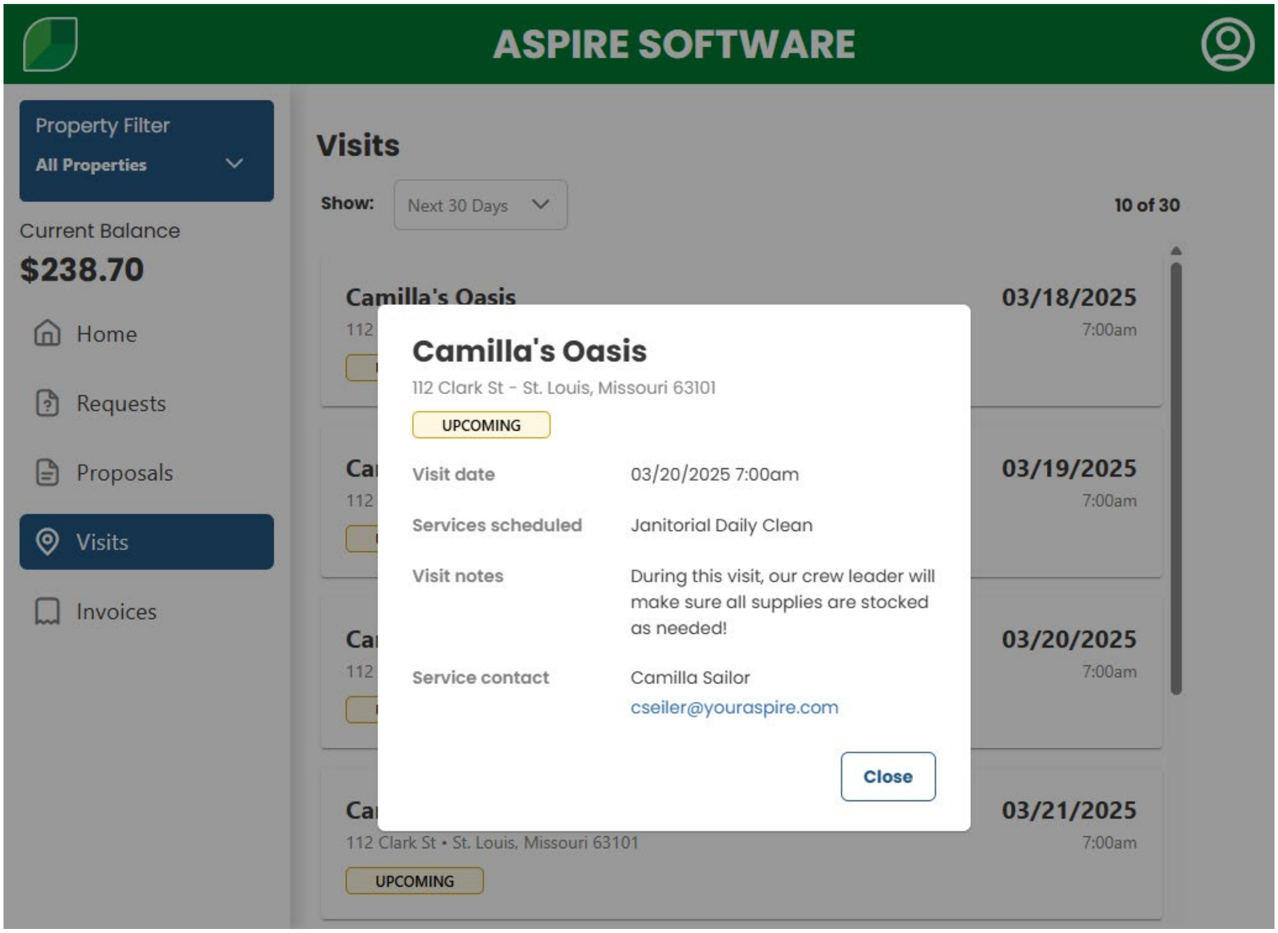
On the *Visits* section of the *Customer Portal*, you **review** *Completed* or *Upcoming Visits* for the next 30 days.



- **Selecting** any of the *Visits* on this screen will display more details:



- Visit details shown in the portal include the *Visit Date,* scheduled *Services*, shared *Visit Notes*, and the *Service Contact's* details.



Viewing and Paying Invoices

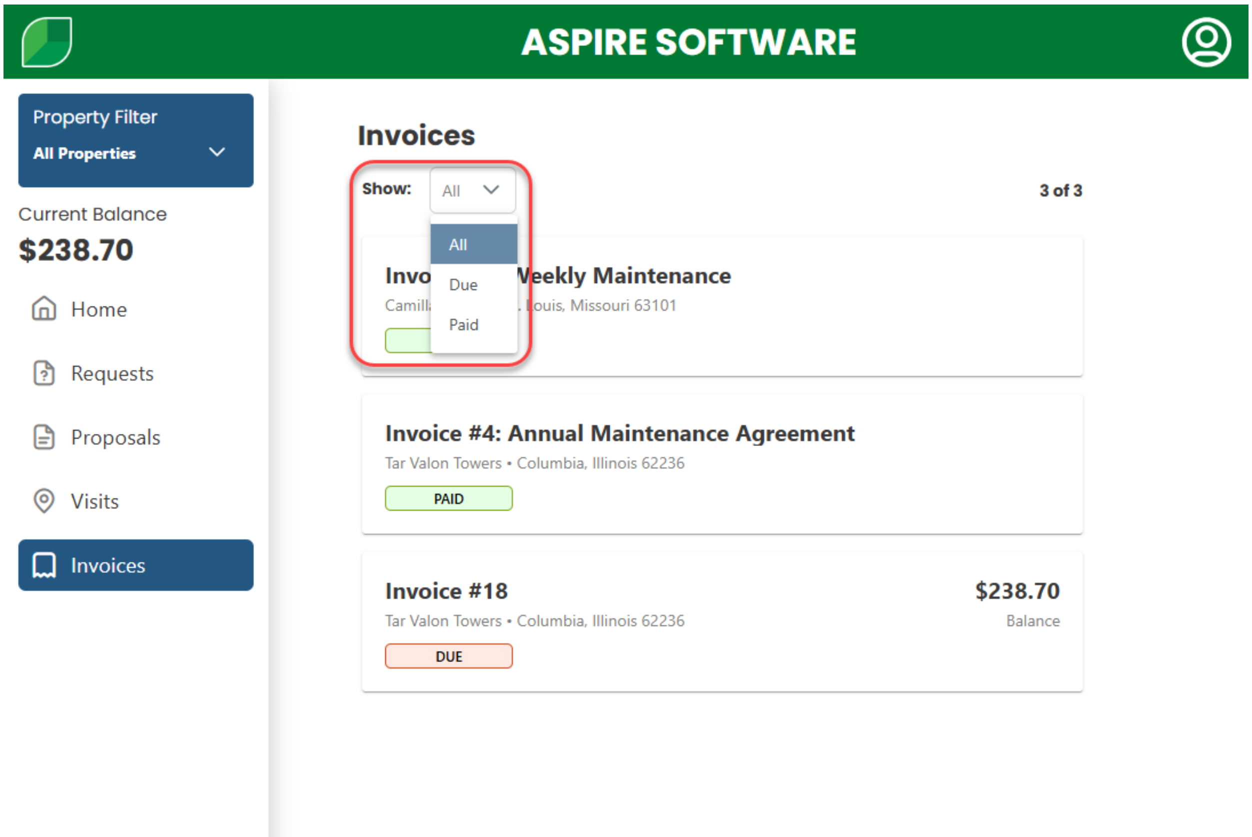
Note: If you do not see *Invoices* **displayed** in the customer portal, you can **skip this section**.

Viewing Invoices

When invoices are sent, you can view them inside of the portal if you are a contact tied to the invoiced property and have accepted your customer portal invite. You could also make payments as long as the company managing the customer portal has electronic payments **enabled**!

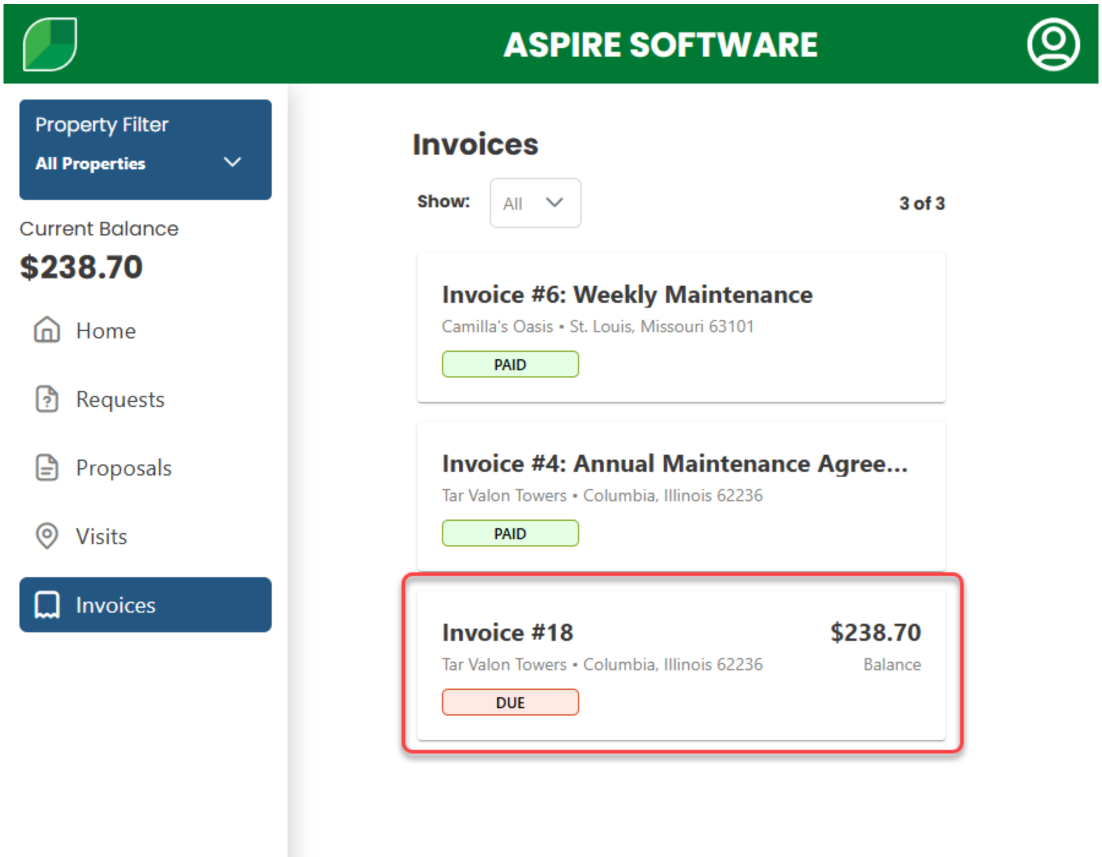
Either the *Primary* contact on the property, or the *Billing* contact on the invoice can **make payments** on the Invoice.

You can choose to select between viewing *All, Due or Paid* invoices in the dropdown on this screen.



This list will display important information regarding your individual invoice balances, the property the invoice is for, as well as the Service the invoice is for.

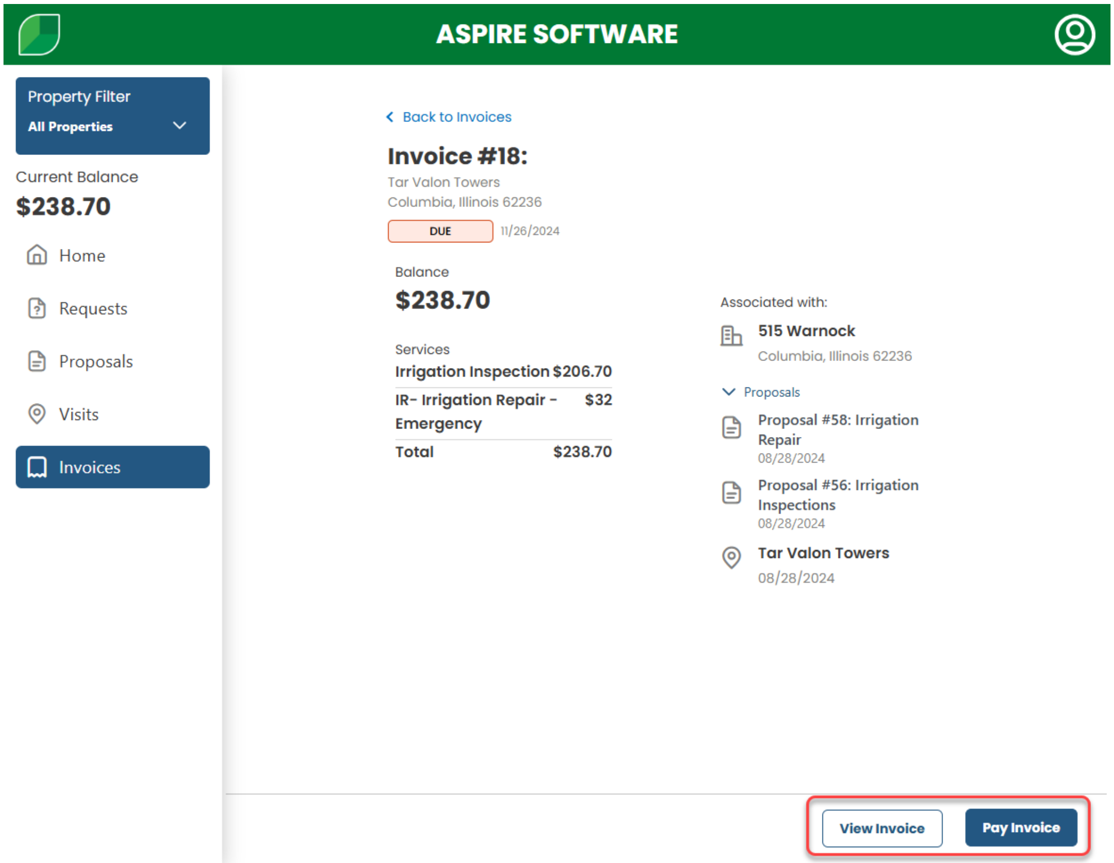
If you click on any invoice line item on this screen, you will be taken to the Invoice details screen in a webpage format.



Paying Invoices

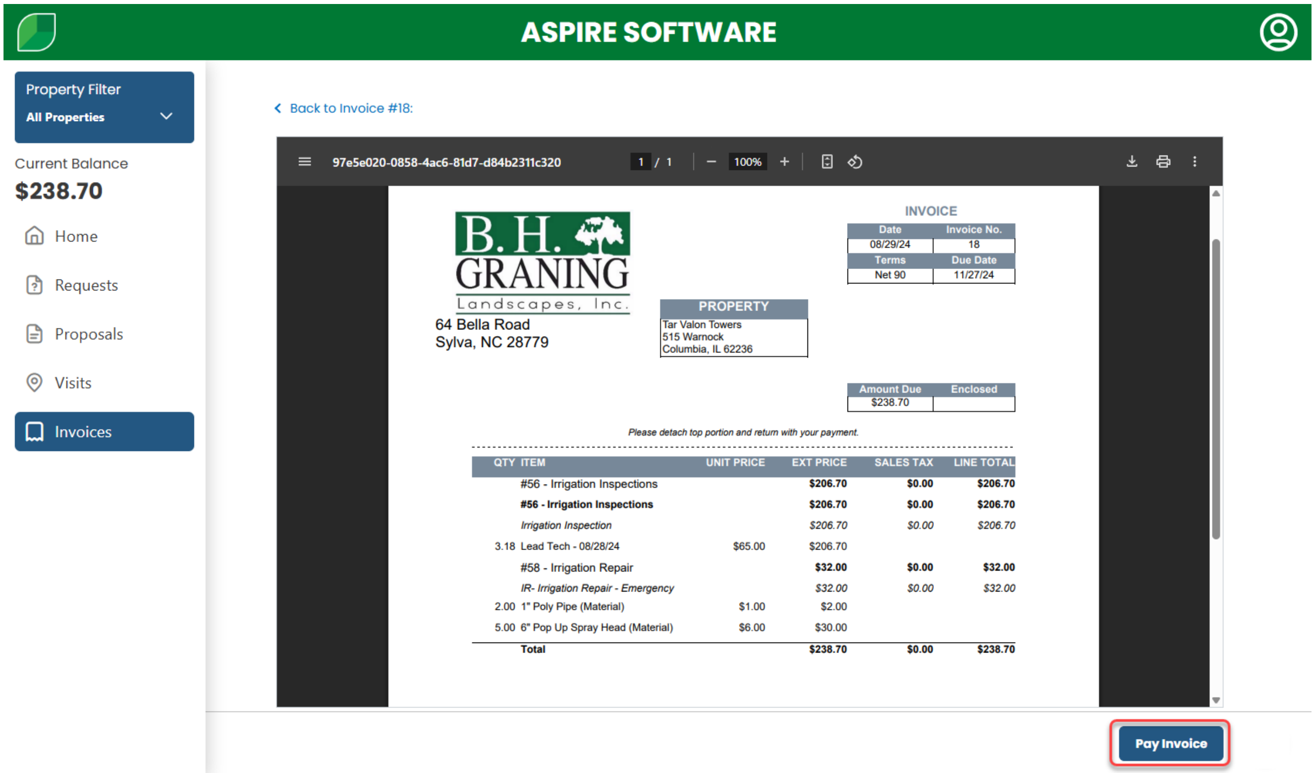
Note: If you do not see *Pay* **displayed** in the customer portal, you can **skip this section**.

The action buttons for paying invoices are *View Invoice or Pay Invoice*.



Clicking *Pay Invoice* brings you directly to the payment screen!

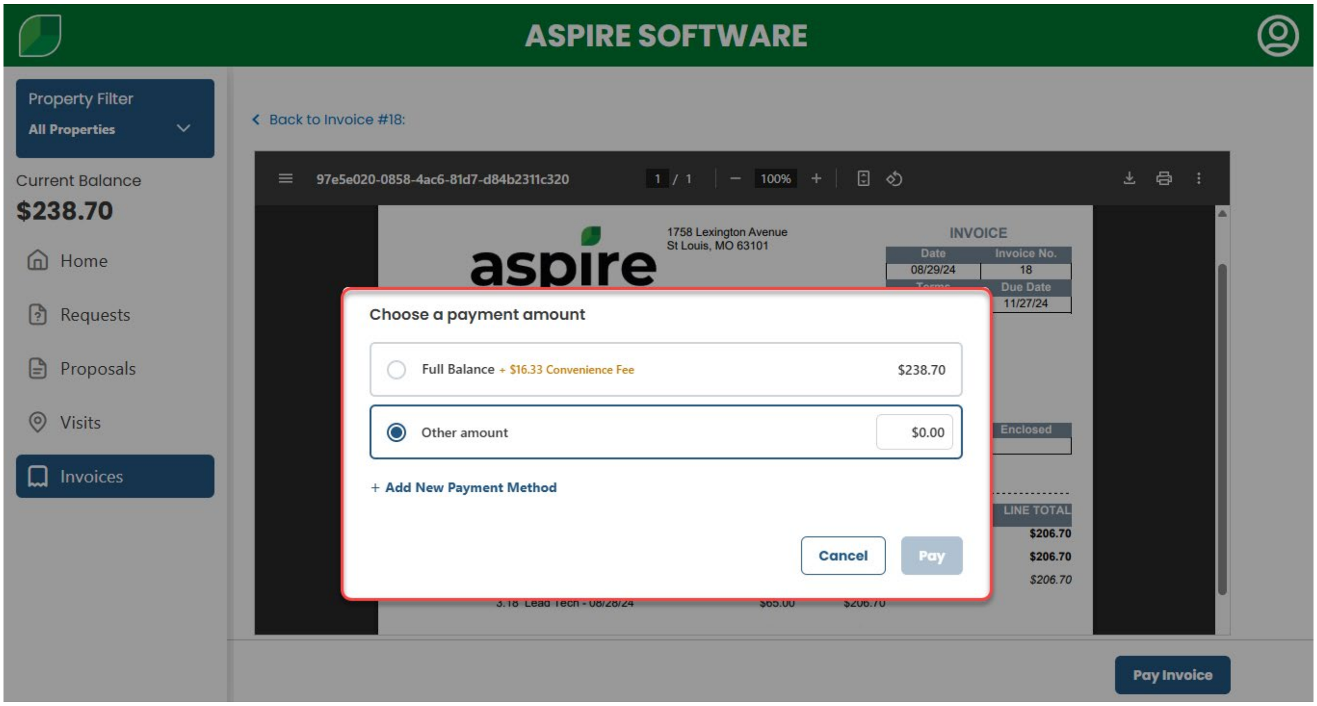
Clicking *View Invoice* will allow you to view the *Invoice* in a PDF format. After reviewing the *Invoice*, you can **click** *Pay Invoice* on this screen.



Choose a Payment Amount

📌**Note:** If you don't see *Other Amount* on this screen, you can skip this section.

If *Partial Payments* are accepted for your customer portal, then there will be an option to pay either the *Full Balance* or *Other Amount*, which allows you to **pay** a partial amount towards their *Invoice Balance.*



Any convenience fees are **automatically calculated** on this screen and will be **displayed.**

🧠If you have any payment methods on file, they will be displayed in this window. You can always choose to use the *Add New Payment Method* option before paying the invoice.

Important to know about *Invoices* in the Customer Portal:

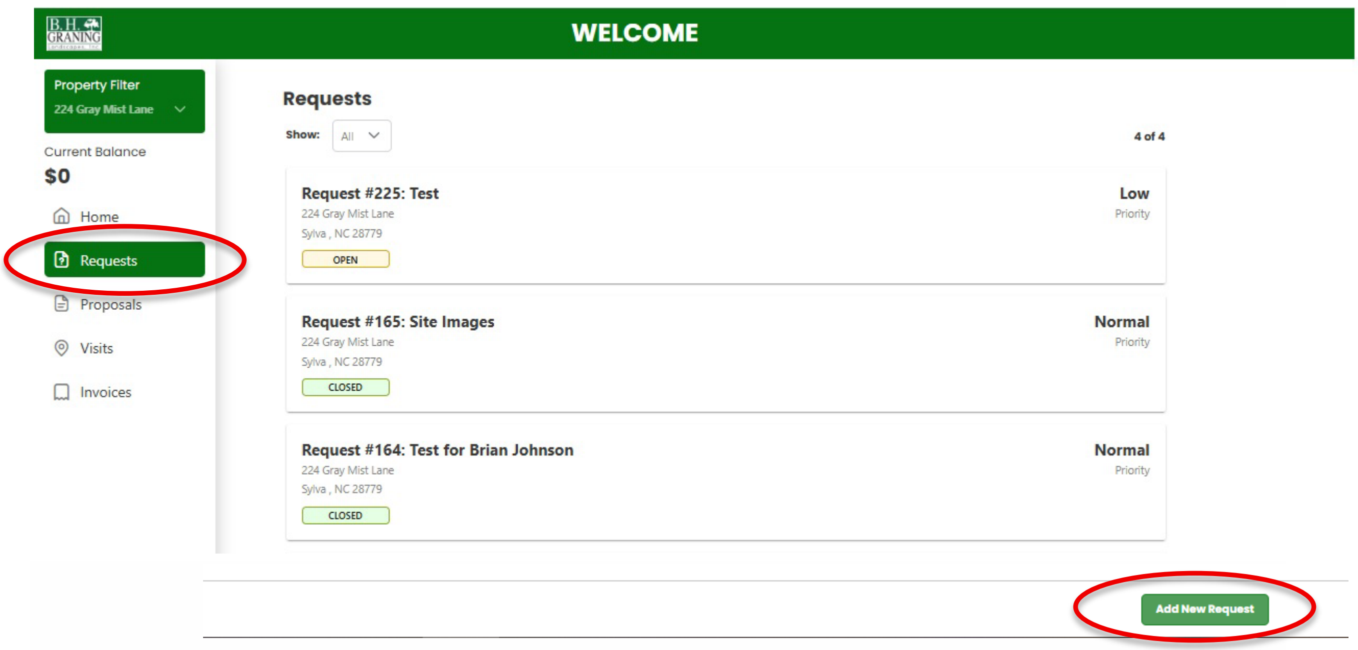
🧠 The due date **displayed** in the *Customer Portal* is tied to the net terms of the properties' invoices.

Viewing Requests

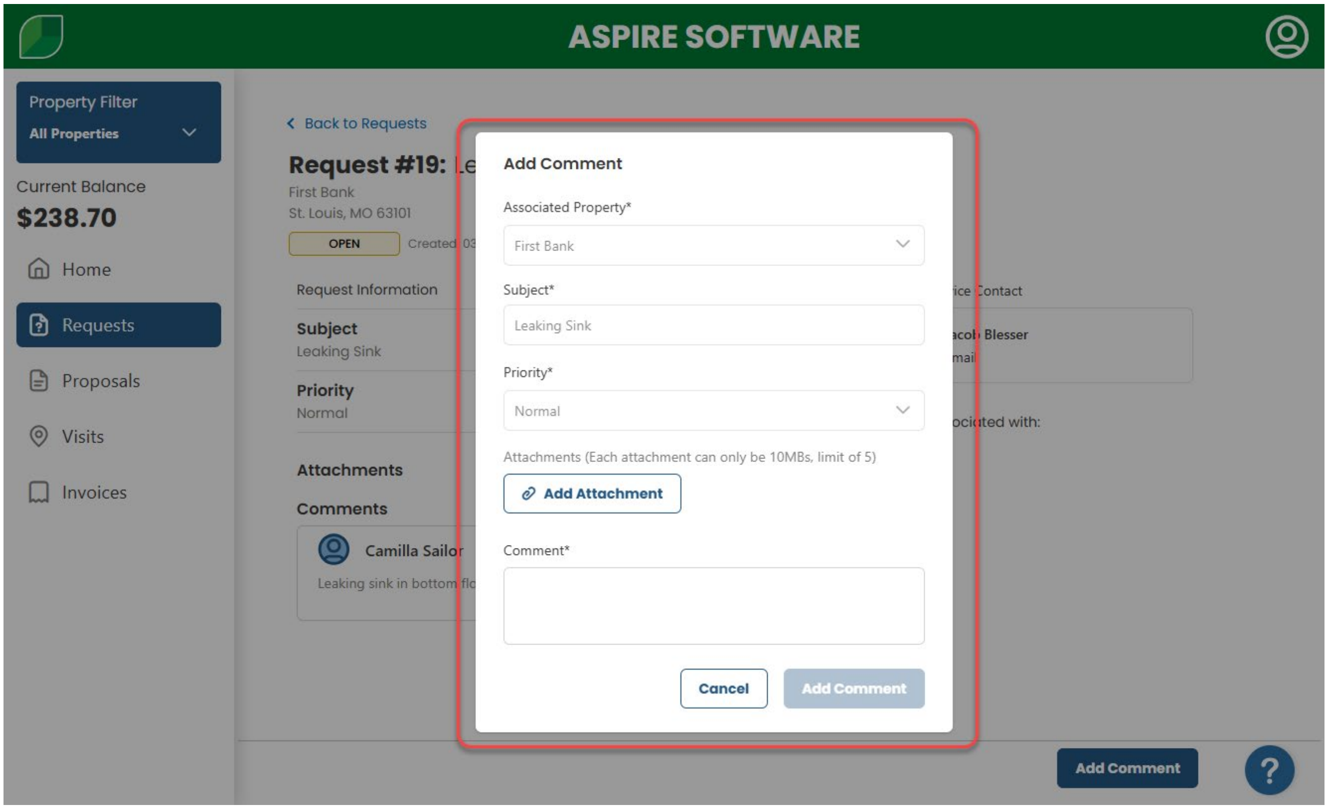
📌 **Note**: If you do not see Requests **displayed** in the customer portal, you can skip this section.

You can **view** *Requests* that are tied to your properties including any comment that is made onto the *Request* in the customer portal.

🧠All contacts tied to this property can view, create, and comment on Requests.



You have the option to **add** comments, including adding attachments, or you can **create** new *Requests* directly from the portal for any of their properties.



Once a request has been created in the portal, the *Account Owner* associated with your property will receive an email notification, letting them know that there is a new *Request* ready for review.