



**SERVICE
POINT
CUSTOMER
PORTAL**

Enhance your client relationships and reduce their need to call you by giving them selected web access to important contract information, including their outstanding invoice details and site binders

The Templa CMS Customer Portal module allows you to deliver information and selective data entry functionality out to your client via the internet through a password controlled client log-in screen on your website. This can include client financials such as aged debtor balances with a drill down list of outstanding transactions. It can also include access to selective contract details for each cleaning location in the client's contract. For example your cleaning specification, staffing complement, staff training records, quality inspection scores, risk assessments and the Site Binder containing your company and health and safety details - a legal requirement.

Typical challenges faced by contractors

- More of our clients are asking to be able to access key contract data like cleaning specifications, risk assessments, health and safety policy, details of periodic work and training records
- "It might help resolve invoice queries sooner if clients could view upcoming invoices before they arrive"
- "Now we have to provide a site manual with key contract details it make sense that clients could access it online"
- "We want to improve our green policy with our clients which means less paperwork and paper trails, but this means I've got to get a new website built to accomplish this"



TEMPLACMS

Fully integrated management software for cleaning contractors

Templa CMS Customer Portal – features and benefits

Feature

Benefit

CMS Customer Portal provides a client log-in updated and controlled by you, as well as access to documents also defined by you

You are able to offer your clients secure access to key contract data making it easier for them to do their job and support your on-site teams

CMS Customer Portal allows clients to log in to view aged debtor balances along with payment dates and forthcoming invoice breakdowns

As well as making it easier for your clients to manage the payment side of your contract, it also reduces the need for them to contact the office with financial queries

CMS Customer Portal gives your client access to the details of each site or contract for which they are responsible, such as the different cleaning tasks, names and training records of employees, quality audit results, work-bills, hygiene product prices and purchases, billing information, equipment on site and any other data authorised by you

You are now able to offer your clients a level of transparency that will build high levels of trust into your client-contractor relationship

Using the CMS Customer Service module, you have already created the legal requirement of the client Site Binder which includes mandatory information about health and safety. To this you can now add discretionary, contract reference documentation such as cleaning specifications and calendars for periodic and one-off work

Given that your field management may only be scheduled to personally visit clients at, say, monthly intervals, access to the Site Binder means your client is now 'up to speed' at any one time with useful information they would otherwise only be able to obtain by contacting the office, thus strengthening the relationship

If green credentials are a key business driver for your company, you need a strategy to remove the paperwork and paper trails out of the business

By managing client data centrally and in real-time, when your clients log in to their portal, they see the latest version of the truth without the need to request a visit or a report



With its unique way of storing all contract data in a central database, CMS was the only realistic choice from the competing systems available in the market.

Stephen Corrigan – Managing Director, Grade One Commercial Cleaning

Why CMS Customer Portal?

In an age where transparency and openness are valued as part of a successful client-contractor relationship, the ability for clients to access relevant information is key. You are seen to be promoting a partnership approach whilst remaining in control of the information you are sharing.