

Managing Client Profiles from the Client Portal

Client Profile provides your clients with the demographics, payment methods, passwords, and contact information you have entered for them. Client profile information is originally entered in the [Client Manager](#).

View Profile

Clicking **View Profile** opens the *Client Profile* page. From the *Client Profile* page, your clients can view their address and contact information and perform the following actions.

Tracy Landscaping 8 open jobs 6 closed jobs 1 outstanding invoice 2 active services Log Out

Client Profile

ADDRESS & CONTACT INFORMATION edit

Name: Rose Tracy
Company: Tracy Landscaping
Address: 303 Main Street, Fort Davis, TX 79702, United States
Email: rose@tracylandscaping.com
Phone: 1234567890
Fax: 1234567891
Invoice Delivery: Email Only

LASTEST COMMENT

Updated by: demodemo
Time: 9:58:44AM Mar/07/2018
Comment: Using CloudPrint plugin. [View all comments](#)

AUTHENTICATED CONTACTS add contact

Primary Contact: Rose Tracy 1234567890 [Change](#) [Delete](#)

AUTHENTICATION

Password: Click to change
Two Factor: Not available

BILLING SUMMARY

Invoice Send Date: 15th
Status Invoice Due Date: 1st
Late Fee Schedule: No Late Fees

MASTER SERVICE AGREEMENT

Master Service Agreement: Default MSA
Status: Active
PDP: MSLA.pdf (114 KB)
Signed: Mar/07/2018 by Rose Tracy
Expiration: Mar/07/2019
Term: 1 year
Auto Renew: 6 months
Expires after service cancellation: 30 days

Edit Client Profile

Clicking **edit** opens the *Edit Client* page. This page enables your clients to adjust their own basic demographic information such as name, address, phone and email.

Note

If a client needs to change their email address, they must first provide their current password.

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Change Password

Clicking **Click to change** in the *Authentication* section opens the *Change Password* page. This provides your clients the ability to manage their own account password.

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On this page:

On this page:

- View Profile
- Edit Client Profile
- Change Password
- Enabling Two-Factor Authentication
- View all Comments
- Add Contacts
- Edit Contacts
- Deactivate Contacts
- View the Master Service Agreement
- Payment Methods
- Add Credit Card
- Add Bank Account
- Add Billing Agreements
- Change Password
- View Contacts
- Related Topics

Enabling Two-Factor Authentication

Clicking **Click to enable** in the *Authentication* section opens the *Two-Factor* page. This provides your clients with the ability to use a TOTP multi-factor authentication application to log into Ubersmith.

The screenshot shows the 'Client Profile' page for 'Tracy Landscaping'. The 'Authentication' section is highlighted, showing 'Password' and 'Two-Factor' options. The 'Two-Factor' option has a red circle around the 'Click to enable' button. The 'Billing Summary' section shows 'Invoice Send Date' as '15th', 'Status' as 'Not available', and 'Late Fee Schedule' as 'No Late Fees'.

View all Comments

Clicking **view all comments** opens the *View Account Comments* page. This information is automatically populated from client comments, if the comments have been marked as client viewable.

The screenshot shows the 'Client Profile' page for 'Tracy Landscaping'. The 'Latest Comment' section shows a comment from 'demoadmin' dated '9:58:54AM Mar/07/2018'. The 'view all comments' link is highlighted with a red circle. The 'Authentication' section shows 'Password' and 'Two-Factor' options. The 'Billing Summary' section shows 'Invoice Send Date' as '15th', 'Status' as 'Not available', and 'Late Fee Schedule' as 'No Late Fees'.

Add Contacts

Clicking **add contact** opens the *Add New Contact* page. This enables your clients to create a new contact with whom your users can interact with.

The screenshot shows the 'Client Profile' page for 'Tracy Landscaping'. The 'Add Contact' button is highlighted with a red circle. The 'Authentication' section shows 'Password' and 'Two-Factor' options. The 'Billing Summary' section shows 'Invoice Send Date' as '15th', 'Status' as 'Not available', and 'Late Fee Schedule' as 'No Late Fees'.

Edit Contacts

Clicking **edit** opens the *View Contact* page, where your clients can update their contact information.

Note

If a contact needs to change their email address, they must first provide their current password.

Tracy Landscaping

8 seen Schedules
8 closed Schedules

1 outstanding Invoice
2 active services

Log Out

Client Profile

ADDRESS & CONTACT INFORMATION

Name: Rose Tracy
Company: Tracy Landscaping
Address: 300 Main Street
Fort Davis, TX 79700
United States
E-mail: tracy@tracylandscaping.com
Phone: 1234567890
Fax: 1234567891
Invoice Delivery: Email Only

AUTHENTICATION

Password: Click to change
Two Factor: Not available

BILLING SUMMARY

Invoice Send Date: 18th
Status Invoice Due Date: 1st
Late Fee Schedule: No Late Fees

LATEST COMMENT

Updated by: demotest
Time: 9:58:44AM Mar/07/2018
Comment: Using CloudPrint plugin
[View all comments](#)

AUTHORIZED CONTACTS

1: Primary Contact
Rose Tracy 1234567890 [tracy@tracylandscaping.com](#) [Deactivate](#)

MASTER SERVICE AGREEMENT

Master Service Agreement: Default MSA
Status: Active
PDF: [MSLA.pdf \(114 KB\)](#)
Signed: Mar/17/2018 by Rose Tracy
Expiration: Mar/17/2019
Term: 1 year
Auto Renew: 6 months
Expires after service cancellation: 30 days

Note: clicking on a contact's name also opens the *View Contact* page.

Deactivate Contacts

Clicking **deactivate** removes a contact from the active contacts and disables their Ubersmith login credentials.

Tracy Landscaping

8 seen Schedules
8 closed Schedules

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Log Out

Client Profile

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Company: Tracy Landscaping
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United States
E-mail: tracy@tracylandscaping.com
Phone: 1234567890
Fax: 1234567891
Invoice Delivery: Email Only

AUTHENTICATION

Password: Click to change
Two Factor: Not available

BILLING SUMMARY

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Status: Active
PDF: [MSLA.pdf \(114 KB\)](#)
Signed: Mar/17/2018 by Rose Tracy
Expiration: Mar/17/2019
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Auto Renew: 6 months
Expires after service cancellation: 30 days

View the Master Service Agreement

Clicking the **pdf** link in the opens the master service agreement between you and your client.

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8 seen Schedules
8 closed Schedules

1 outstanding Invoice
2 active services

Log Out

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Address: 300 Main Street
Fort Davis, TX 79700
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Invoice Delivery: Email Only

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AUTHORIZED CONTACTS

1: Primary Contact
Rose Tracy 1234567890 [tracy@tracylandscaping.com](#) [Deactivate](#)

MASTER SERVICE AGREEMENT

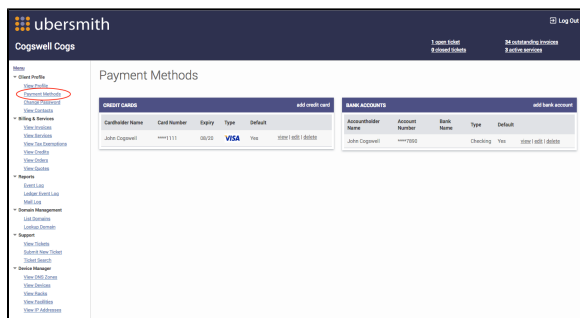
Master Service Agreement: Default MSA
Status: Active
PDF: [MSLA.pdf \(114 KB\)](#)
Signed: Mar/17/2018 by Rose Tracy
Expiration: Mar/17/2019
Term: 1 year
Auto Renew: 6 months
Expires after service cancellation: 30 days

Payment Methods

Clicking **Payment Methods** opens the *Payment Methods* page. From the *Payment Methods* page, your clients can view, edit and delete their credit card and bank accounts on file and perform the following actions.

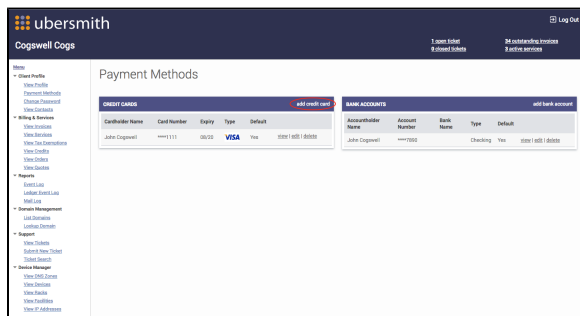


You can control what payment types are editable from the *Settings* page.



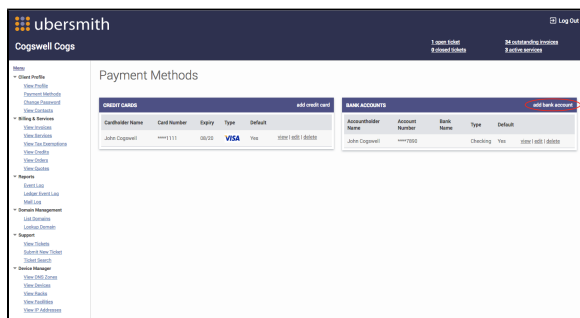
Add Credit Card

Clicking **add credit card** opens the *Add Credit Card* page, where your clients can add their credit card account and billing account information.



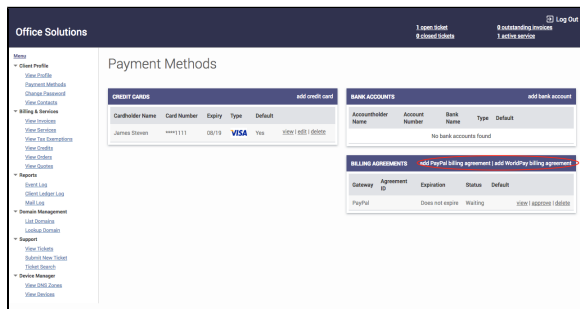
Add Bank Account

Clicking **add bank account** opens the *Add Bank Account* page, where your clients can add their bank account and billing account information.



Add Billing Agreements

Clicking add PayPal billing agreement or add WorldPay billing agreement opens the PayPal or WorldPay site, where your clients can establish a billing agreement to use the merchant as a payment method.



Change Password

Clicking **Change Password** opens the *Change Password* page, where your clients can change their own account-level password.

Change Password

Create New Password

Password Requirements:

- Password must not be the same as the username
- Password must be at least 7 characters
- Password must contain both alphabetic and numeric characters
- Password cannot be one of the last 4 passwords used

Old Password:

New Password:

Confirm Password:

Save New Password

Cancel

View Contacts

Clicking View Contacts opens the Contact page. From the Contact page, your clients can manage their own contacts and [add](#), [edit](#), and [deactivate](#) contacts.

The screenshot shows the HubSpot CRM interface. The top navigation bar includes the HubSpot logo, the company name 'Cogswell Cogs', and a 'Log Out' button. The main header area displays '1 open ticket', '3 scheduled tasks', and '2 active sessions'. The left sidebar contains a navigation menu with options like 'Home', 'Email Profile', 'Personal Metadata', 'Social Metadata', 'Sales & Service', 'Reports', 'System Management', and 'Admin'. The 'Sales & Service' section is expanded, showing 'Contacts' as the selected option. The main content area is titled 'Contacts' and shows a list of contacts. The first contact is 'John Caporale', with a 'Primary Contact' status. The 'Email' column for this contact shows 'john@coppsed.com' and a red circle highlights the 'Add' button next to it. The table has columns for ID, Name, Title, Phone, and Email. Below the table, there is a link to 'View all contacts'.

Related Topics

[Client Portal](#)