ACT Customer Portal

Administration and Usage Guide

ABSTRACT

Use this guide for guidance on registering, requesting and administering customer branded ACT portals

CONTENTS

Overview

The primary ACT Portal is customer agnostic; any registered customer can log in to their account to place orders, review order status, and otherwise manage their account.

For companies that need greater flexibility and control than that provided by the Portal, ACT provides a customization option.

With this option, using your brand and logo, you can provide ACT's portal to your employees, contractors and other agents:

1. any special pricing you have arranged
2. consolidated billing
    a. optional monthly invoicing
3. site specific settings
    a. Sketch and/or Hail Report, Rapid Roof or Onsite Aerial Photography (Drone based)
    b. Estimating package version (Xactimate, Symbility)
    c. Product options (added PDF, Estimates, , Express Service)

Arrangements for a branded site are quite simple.

1. Register your company with ACT
2. Request the branded site from ACT
3. Add authorized users

The following pages document the process and information required to stand up a site.

Registration

The first step in creating a custom page for your company is to register with ACT. The contact information provided by registration identifies the person that will be the site administrator.

If your company already has an administrator user registered, you may skip to Site Request to continue.

Please register by completing the registration form located at here or by copying the following url into your browser's address field. (https://act-orders.azurewebsites.net/register).

Figure 1. ACT Registration Form

Notice that registration requires entering credit card information. This information is used in lieu of a formal credit check.

The default configuration for custom sites is that orders placed by THIS user is billed to THIS CC, but orders placed by ANY other authorized user of the site is billed according to THEIR registration details.

You may configure your site to use differing payment terms. Please see payment details in the section on Site Request.

Site Request

Once you have registered an administrator user for your company you must submit a request to the ACT Administrator to establish your custom site. Please send an email to admin@act.claims with the following information:

1. Your Company Name
2. The URL to your company's web site or, attach the logo image file that you wish used to 'brand' your site.
   a. ACT will use the logo prominently displayed on your site if you do not attach a preferred image file
3. Your site administrator's profile ID
   a. To find the administrator's profile ID please login here or by copying the following url into your browser's address field. (https://act-orders.azurewebsites.net/login)
   b. Click on the down arrow next to the administrators name in the upper right corner of the page and select 'My Account'.
   c. The administrator's profile ID is an 8-digit number displayed in the upper right corner of the Contact Information panel.

4. Answer the following:
   a. Do you wish to pay for all orders placed by authorized users? Yes or No (default)
      i. YES, will turn on centralized billing! Your account will be billed based on the payment terms agreed to in your account profile.
      ii. NO, will bill submitted orders based on the logged in user's account profile.
   b. If you answered YES above (centralized billing), do you wish to use the Credit Card on file to pay for orders at submission time? Yes (default) / No (requires ACT approval)
      i. NO, upon ACT approval, will generate monthly itemized invoices sent to your administrative contact via email for payment. Payment method can be Check, EFT or Credit Card.
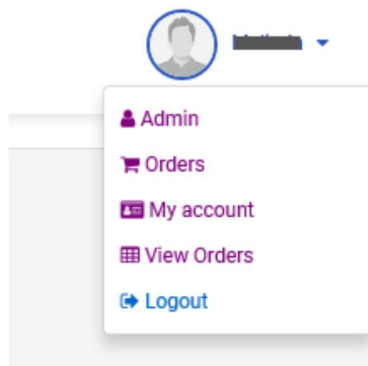
Email the information requested above to admin@act.claims. An ACT administrator will contact you as soon as possible with status and answer any further questions you may have. Once completed you can log in to your account and will find that you now have admin capability to authorize site users.

Site Administration

Once you have custom site enabled you must enable access to your site for any potential user other than the defined site administrator.   Users must be registered with ACT and provide their Profile IDs.

To add, delete, enable or disable additional users of your site log in as the administrator.

Once logged in you can click on the down arrow next to your name and see the additional function.

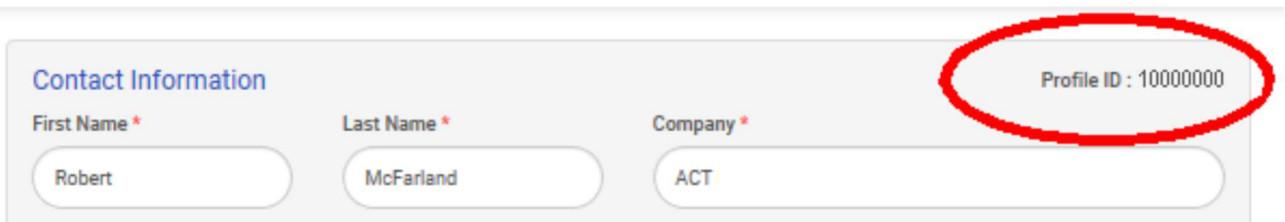Selecting Admin will display the Site Administration screen.

This is where you manage access to your site.

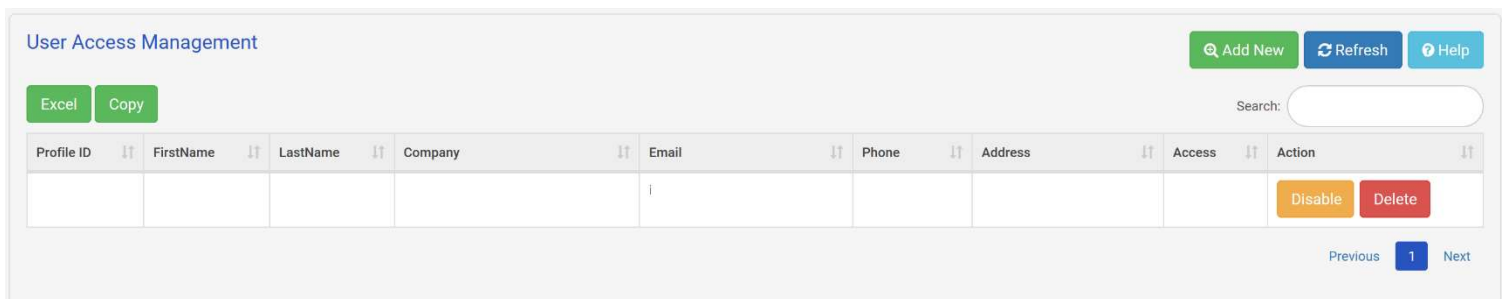The Help pop-up provides information on the capabilities provided.

Please note that you must know the Profile ID of the user you wish to add to your Access List.

To find a user's Profile ID they must login, click on the down arrow next to their name in the upper right corner of the page and select 'My Account'. Their Profile ID is an 8-digit number displayed in the upper right corner of the Contact Information panel.

Once you have a Profile ID of a prospective user, using **⊕ Add New** you can search for their Profile to verify basic information and add them to your access list.