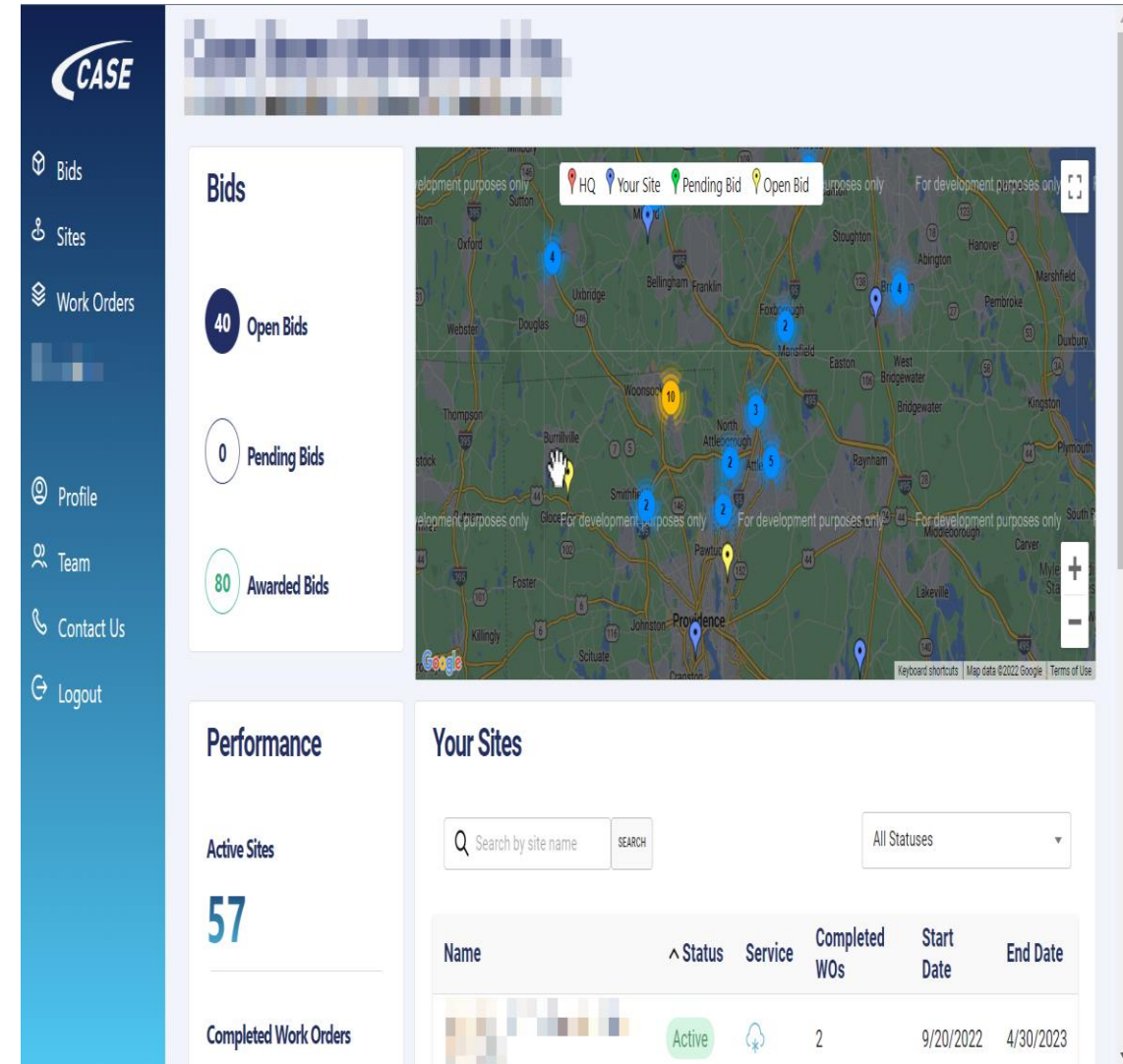




CASE Portal is a solution that allows Service Partners to manage their CASE and LFX book of business.

Benefits of using the Portal include:

1. **Secure:** No passwords to remember. The Portal and CASE APP are magic link enabled (secure link).
2. **Dashboards:** Find open, pending, and awarded bids and quickly see sites mapped out.
3. **Grow your business:** Access open bids within the CASE Portal and get real-time status of bids.
4. **Work Order Management:** Ability to see the details of the work order: including photos, service completed, and time of service.
5. **Insurance Compliance:** Upload insurance documents and review the status of insurance.



The screenshot displays the CASE Portal dashboard. On the left is a dark blue sidebar with the CASE logo and navigation links: Bids, Sites, Work Orders, Profile, Team, Contact Us, and Logout. The main content area is divided into several sections. At the top, there's a blurred header. Below it, the 'Bids' section shows three circular counters: 40 Open Bids (blue), 0 Pending Bids (grey), and 80 Awarded Bids (green). To the right of these counters is a map of a region with various locations marked by colored pins (blue for open bids, yellow for pending, green for awarded). Below the map is a 'Performance' section with a 'Active Sites' counter showing 57. To the right of the performance section is a 'Your Sites' section featuring a search bar, a dropdown for 'All Statuses', and a table of active sites.

Name	Status	Service	Completed WOs	Start Date	End Date
[Blurred]	Active	[Icon]	2	9/20/2022	4/30/2023

Steps to logging into the Portal

Login steps:

1. Access portal at - <https://partners.casefms.com>
2. Type in your corporate email address (the primary email address with CASE/LFX)
3. Invitation link will be emailed from noreply@notifications.casefms.com
4. Select the link within the email, and you will be rerouted back to the portal



Troubleshooting steps

1. Enter your main email CASE/LFX has on file. Work with the Partner Relations Team or your Account Manager
2. Magic link is only valid once; be sure to detail old emails
3. Clicking an old magic link will cancel a valid link



Sign in with your phone number or email address

2

Phone number or email

SIGN-IN

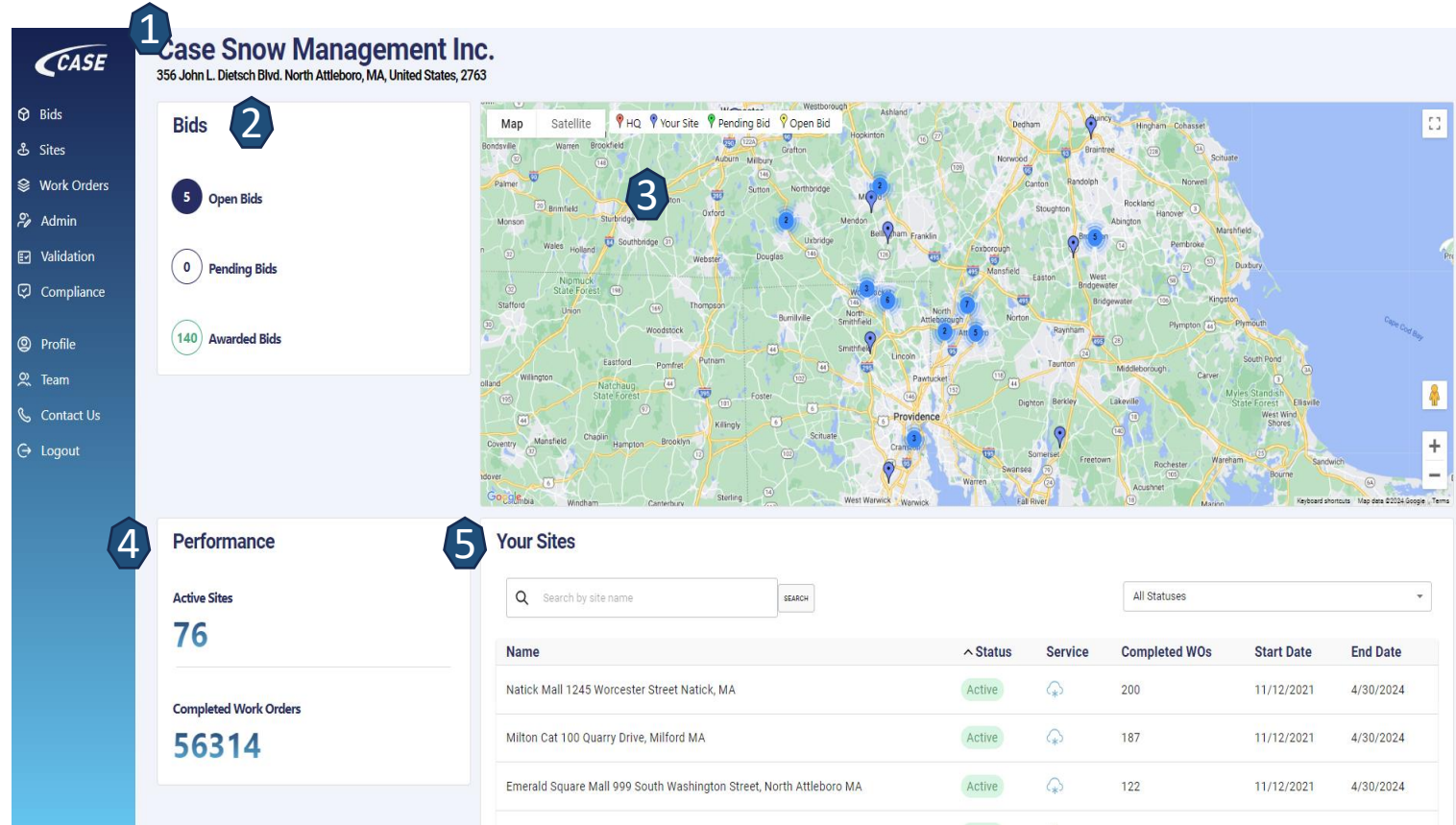
3

Please click this link to access your Case account

https://app.casefms.dev/login?phone_number=%2B14192026120&token=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJ1c2VyJjpwZlIn-Bob25lX251bWJlciI6IjIsbnNDE5Mj-AyNjEyMCJ9LCJpYXQiOiJlY2OTUw-NTk0NTAsImV4cCI6MTY5NTA2M-DA1MH0.QOmakz1QDK-ZXsfrJVri8kYnaYlhxTxa6jTpRVY-grtE

The Service Partner Portal will default on the home page.

1. Service Partner Company name and address
2. Bids – provides view of all Open, Pending, and Awarded Bids
 - a. Coming soon Service Partners will have the ability to review open bids
3. Map – Interactive view of all active and negotiating sites
4. Performance – summary of active sites and summary of efforts across the portfolio
5. Your Sites – quick view of active sites, service trade, # of completed WOs, start date, and end date



The screenshot displays the CASE Service Partner Portal interface for Case Snow Management Inc. The page is divided into several sections:

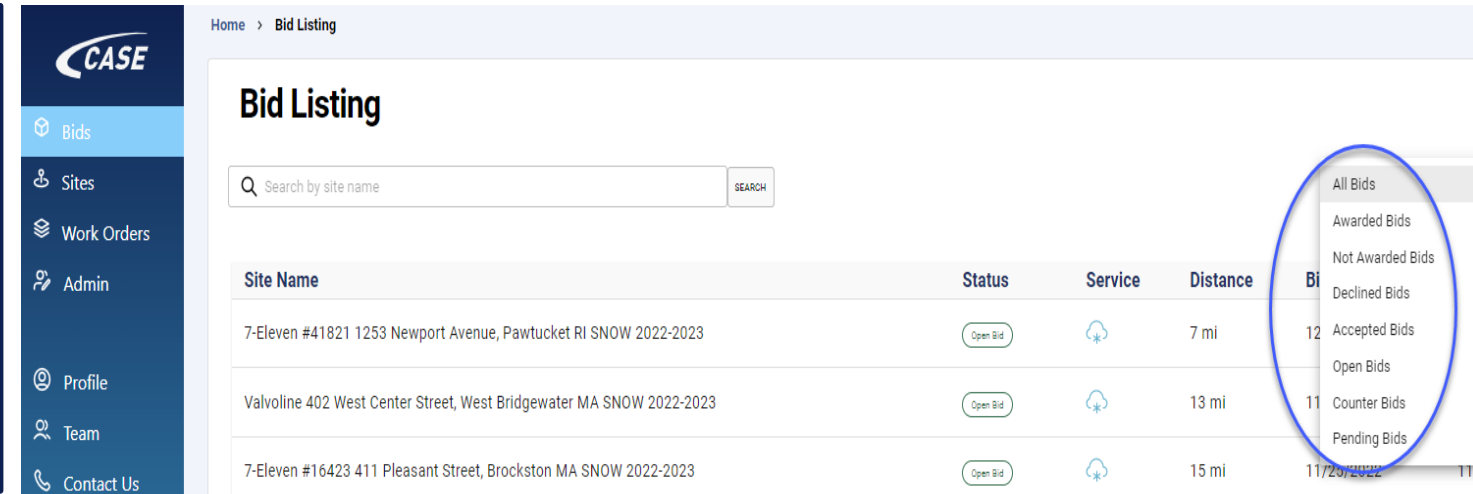
- Header:** CASE logo and company name "Case Snow Management Inc." with address "356 John L. Dietsch Blvd. North Attleboro, MA, United States, 2763".
- Left Sidebar:** Navigation menu with links: Bids, Sites, Work Orders, Admin, Validation, Compliance, Profile, Team, Contact Us, and Logout.
- Bids Section (2):** Summary of bid counts: 5 Open Bids, 0 Pending Bids, and 140 Awarded Bids.
- Map Section (3):** Interactive map showing the location of active and negotiating sites.
- Performance Section (4):** Summary of active sites (76) and completed work orders (56314).
- Your Sites Section (5):** Table listing active sites with details on status, service, completed work orders, start date, and end date.

Name	Status	Service	Completed WOs	Start Date	End Date
Natick Mall 1245 Worcester Street Natick, MA	Active	Cloud	200	11/12/2021	4/30/2024
Milton Cat 100 Quarry Drive, Milford MA	Active	Cloud	187	11/12/2021	4/30/2024
Emerald Square Mall 999 South Washington Street, North Attleboro MA	Active	Cloud	122	11/12/2021	4/30/2024

The Bid is the opportunity section where Service Partners can easily see awarded bids, counter bids, open bids, etc.

Service Partners can see bids status by:

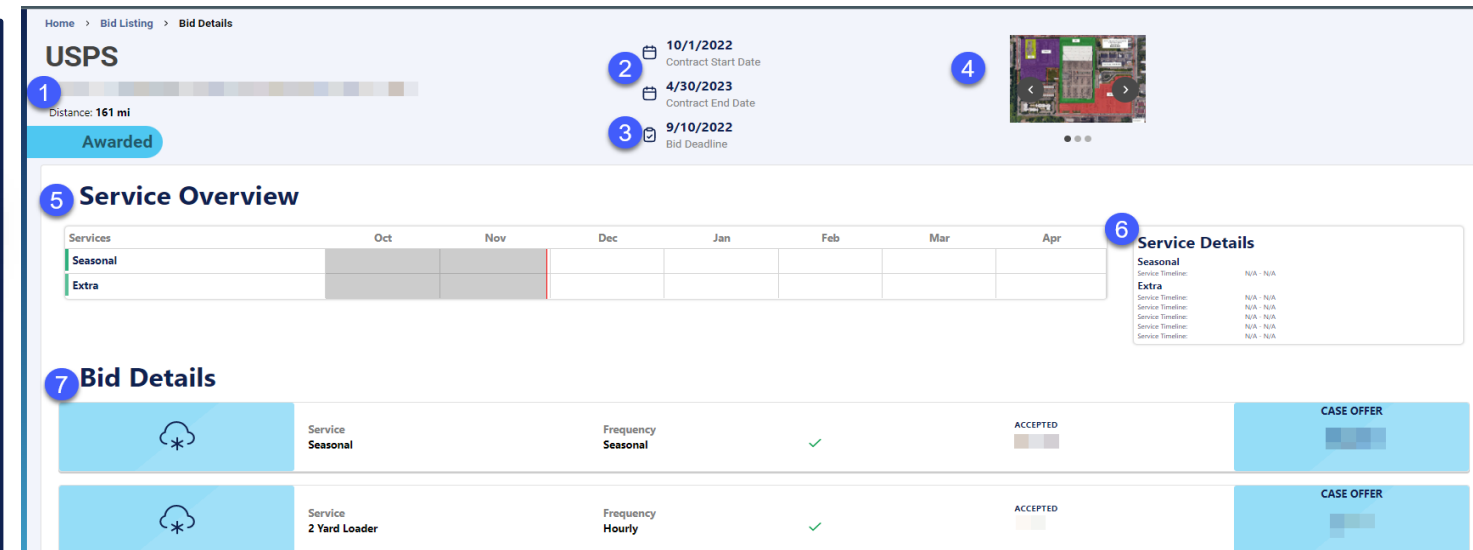
- All bids
- Awarded Bids
- Not Awarded Bids
- Declined Bids
- Accepted Bids
- Open Bids
- Counter Bids
- Pending Bids



To find additional information on the bid, users should select the site name.

Information available:

1. Site address
2. Contract Start and End dates
3. Bid Deadline (if applicable)
4. Site Maps
5. Service Overview
6. Service Details
7. Bid Details

CASE has made responding to Bids quicker and easier than ever. Service Partners can easily accept, make an offer, and decline bids directly in the Portal.

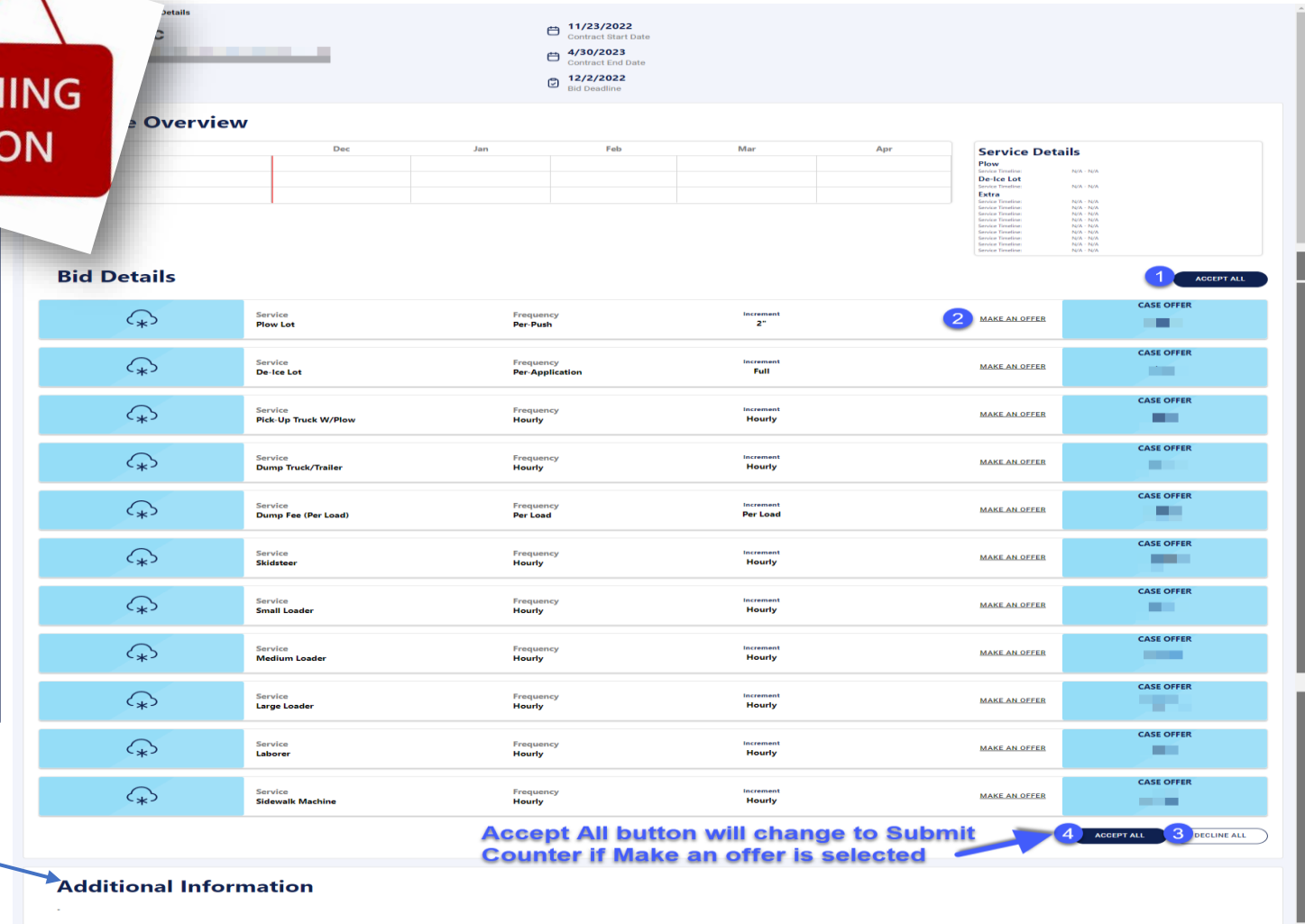
COMING SOON

1. Accept Bid – Select *Accept All*

2. Make an offer - The user should select *make an offer* and enter the counter (each service is itemized). Once completed, the user should select *Submit Counter*

3. Decline – Select *Decline All*

Additional Information – If any supplemental information part of a customer contract will be presented in the Additional Information section. The Service Partner will need to acknowledge this before proceeding.



Contract Details

- 11/23/2022 Contract Start Date
- 4/30/2023 Contract End Date
- 12/2/2022 Bid Deadline

Service Overview

	Dec	Jan	Feb	Mar	Apr

Service Details

Service	Frequency	Increment	MAKE AN OFFER	CASE OFFER
Plow	Per-Push	2"	2	1
De-ice Lot	Per Application	Full		
Extra	Hourly	Hourly		
Pick-Up Truck W/Plow	Hourly	Hourly		
Dump Truck/Trailer	Hourly	Hourly		
Dump Fee (Per Load)	Per Load	Per Load		
Skidsteer	Hourly	Hourly		
Small Loader	Hourly	Hourly		
Medium Loader	Hourly	Hourly		
Large Loader	Hourly	Hourly		
Laborer	Hourly	Hourly		
Sidewalk Machine	Hourly	Hourly		

Additional Information

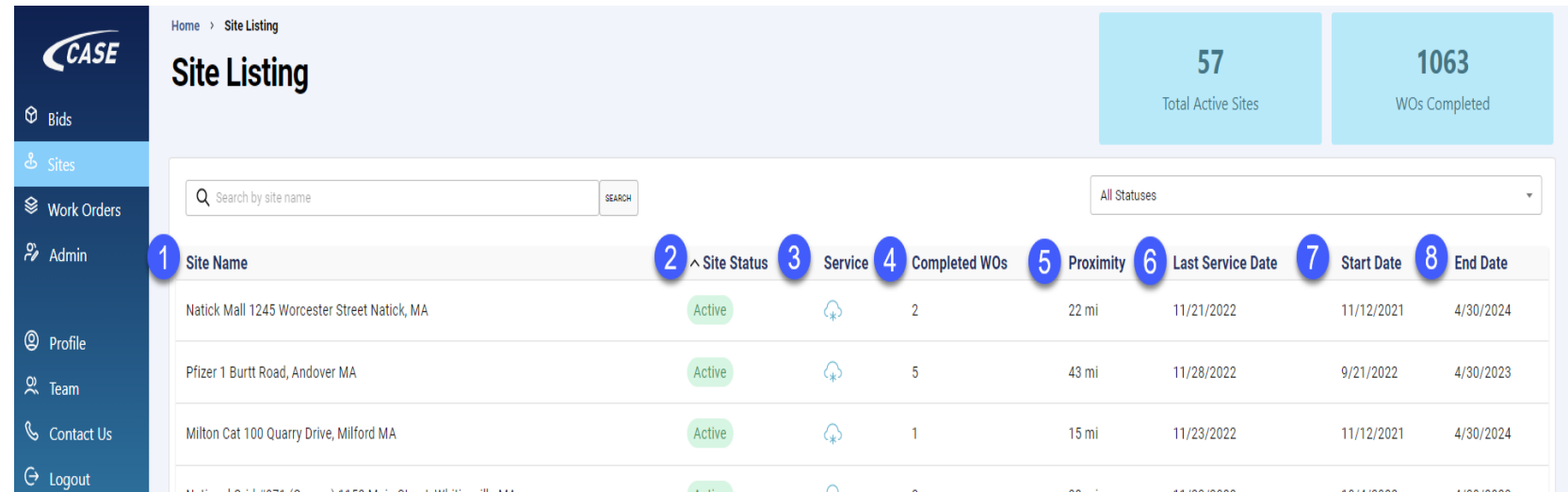
Accept All button will change to Submit Counter if Make an offer is selected

1 ACCEPT ALL 2 3 DECLINE ALL

The Sites tab provides the Service Partner with a summary of sites contracted with Case/LFX.

Information provided on the Site tab:

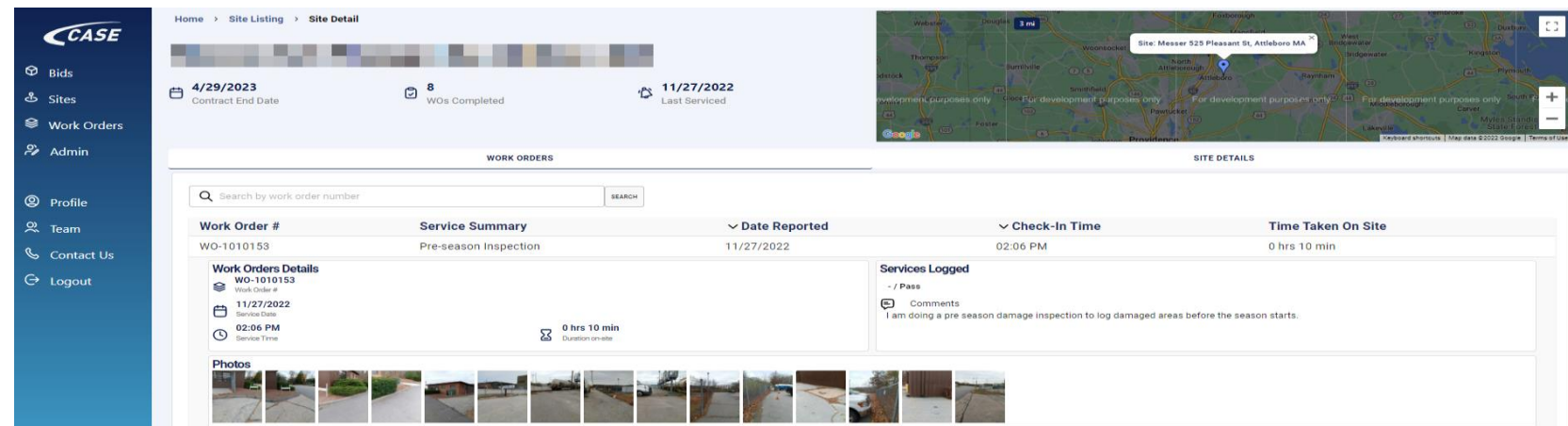
1. Site Name
2. Site Status (active sorted to top)
3. Service
4. Completed WOs
5. Proximity
6. Last Service Date
7. Start Date
8. End Date



The screenshot shows the 'Site Listing' page in the CASE system. On the left is a sidebar with navigation links: Bids, Sites (selected), Work Orders, Admin, Profile, Team, Contact Us, and Logout. The main content area has a search bar and a dropdown for 'All Statuses'. Below this is a table with 8 columns, each numbered 1 through 8 to correspond with the list on the left. The table lists three sites: Natick Mall, Pfizer 1, and Milton Cat. Each row shows the site name, status (Active), service icon, completed work orders, proximity, last service date, start date, and end date.

1 Site Name	2 Site Status	3 Service	4 Completed WOs	5 Proximity	6 Last Service Date	7 Start Date	8 End Date
Natick Mall 1245 Worcester Street Natick, MA	Active		2	22 mi	11/21/2022	11/12/2021	4/30/2024
Pfizer 1 Burtt Road, Andover MA	Active		5	43 mi	11/28/2022	9/21/2022	4/30/2023
Milton Cat 100 Quarry Drive, Milford MA	Active		1	15 mi	11/23/2022	11/12/2021	4/30/2024

Once a user selects a site, they can see further detail of the work completed.



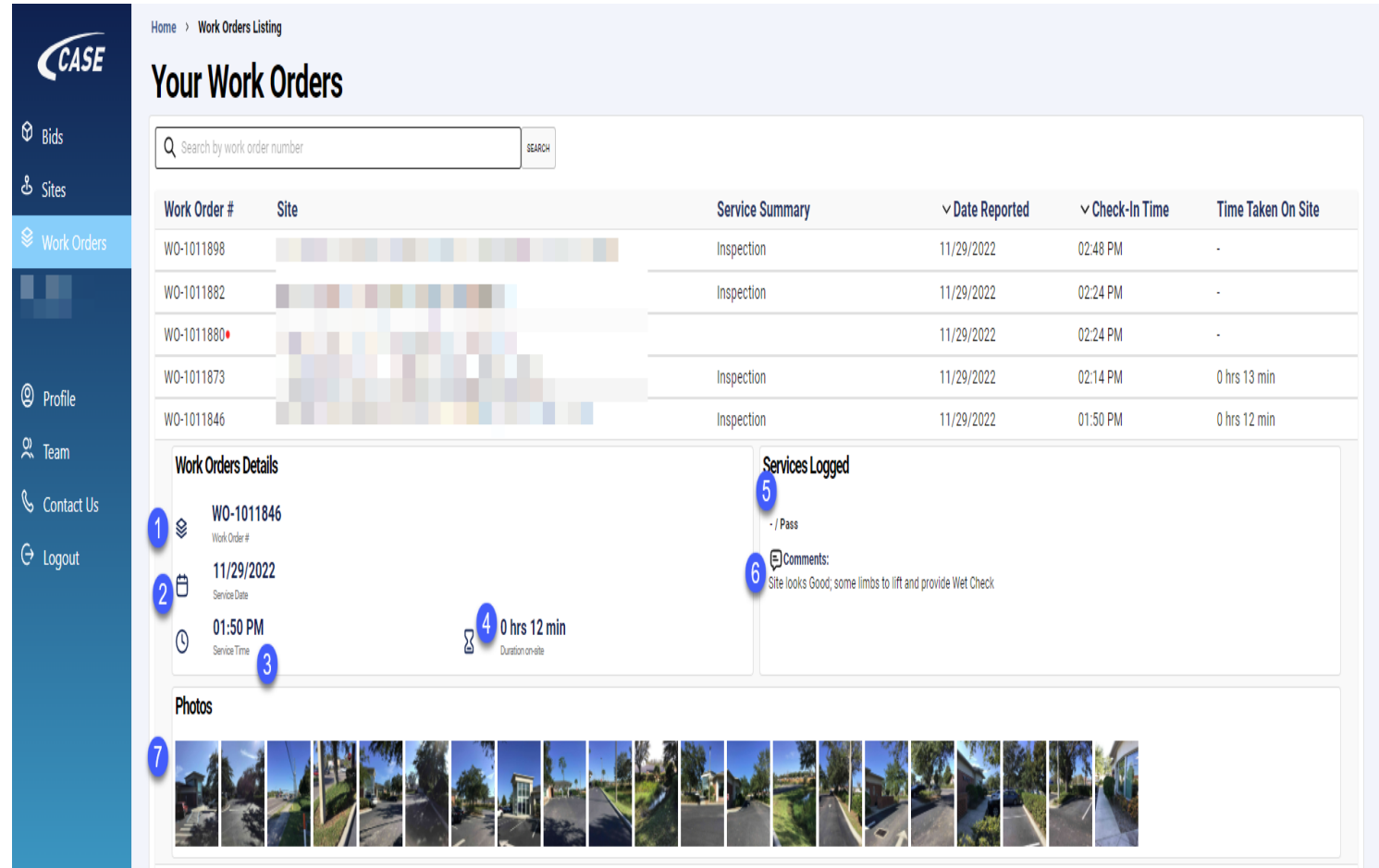
The screenshot shows the 'Site Detail' page for a specific site. It includes a map of the site location (Site: Messer 525 Pleasant St, Attleboro MA) and a summary of work orders. The 'Work Orders' section shows a table with columns for Work Order #, Service Summary, Date Reported, Check-In Time, and Time Taken On Site. Below the table, there are sections for 'Work Orders Details' (showing WO-1010153), 'Services Logged' (showing a pre-season damage inspection), and 'Photos' (a gallery of site images).

Work Order #	Service Summary	Date Reported	Check-In Time	Time Taken On Site
WO-1010153	Pre-season Inspection	11/27/2022	02:06 PM	0 hrs 10 min

The Work Order tab provides the Service Partner with a summary of Work Orders completed, with the most recent shown at the top.

The user can select any of the Work Orders to get further information.

1. Work Order #
2. Service Date
3. Service Time
4. Duration on-site
5. Services Logged
6. Comments
7. Photos



The screenshot displays the 'Your Work Orders' page in the CASE system. A sidebar on the left contains navigation links: Bids, Sites, Work Orders (highlighted), Profile, Team, Contact Us, and Logout. The main content area shows a table of work orders and a detailed view for WO-1011846.

Work Order #	Site	Service Summary	Date Reported	Check-In Time	Time Taken On Site
WO-1011898		Inspection	11/29/2022	02:48 PM	-
WO-1011882		Inspection	11/29/2022	02:24 PM	-
WO-1011880			11/29/2022	02:24 PM	-
WO-1011873		Inspection	11/29/2022	02:14 PM	0 hrs 13 min
WO-1011846		Inspection	11/29/2022	01:50 PM	0 hrs 12 min

Work Orders Details

- 1. WO-1011846 (Work Order #)
- 2. 11/29/2022 (Service Date)
- 3. 01:50 PM (Service Time)
- 4. 0 hrs 12 min (Duration on-site)

Services Logged

- 5. - / Pass

Comments

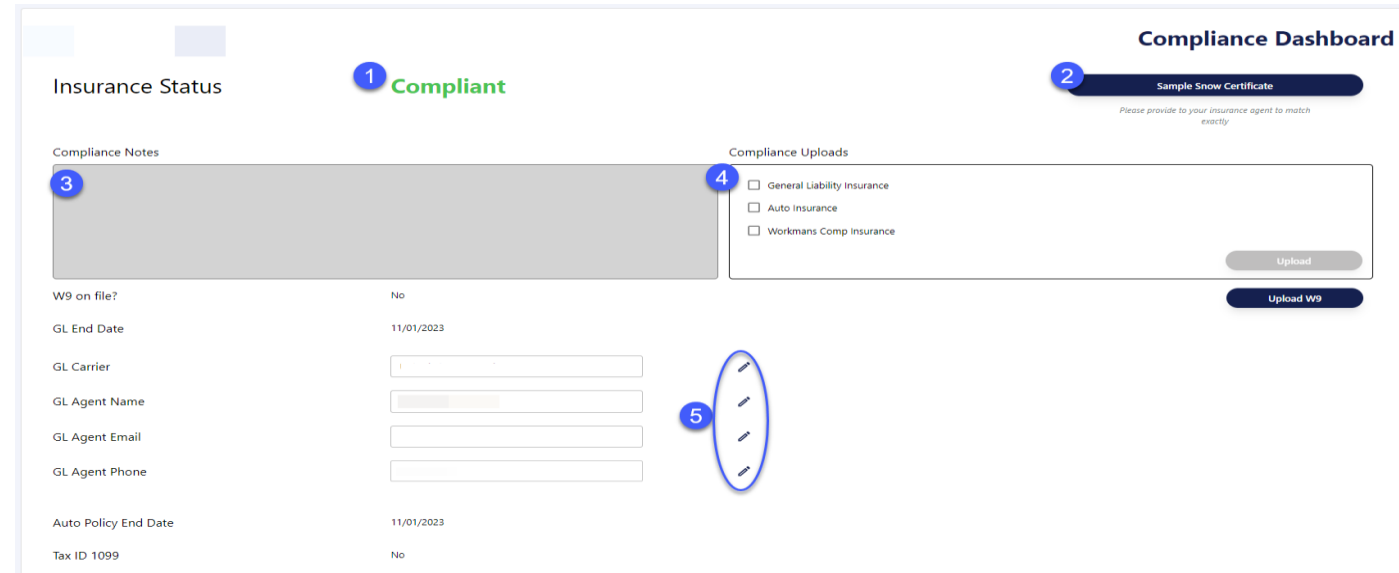
- 6. Site looks Good; some limbs to lift and provide Wet Check

Photos

- 7. A row of 15 thumbnail photos showing various landscape views.

Easily upload and manage your insurance documents through the CASE SP Portal

1. Status will be compliant or non-compliant
2. View a sample Snow Certificate
3. CASE Compliance team will provide status updates within the Compliance Notes
4. Upload insurance documents
5. Edit Agent information



The screenshot shows the 'Compliance Dashboard' with the following elements:

- 1** **Compliant**: Status indicator at the top.
- 2** **Sample Snow Certificate**: Button with subtext 'Please provide to your insurance agent to match exactly'.
- 3** **Compliance Notes**: A large grey rectangular area for notes.
- 4** **Compliance Uploads**: Section with checkboxes for 'General Liability Insurance', 'Auto Insurance', and 'Workmans Comp Insurance', an 'Upload' button, and an 'Upload W9' button.
- 5** **Agent Information**: A group of input fields for 'GL Carrier', 'GL Agent Name', 'GL Agent Email', and 'GL Agent Phone', along with 'W9 on file?' (No), 'GL End Date' (11/01/2023), 'Auto Policy End Date' (11/01/2023), and 'Tax ID 1099' (No).

Are you part of the Business Enterprise Program? If so, let us know and upload your certificate

Company Diversity

- ☐ Minority-Owned Business Enterprise
- ☐ Veteran-Owned Business Enterprise
- ☐ Woman-Owned Business Enterprise
- ☐ LGBTQ+
- ☐ None of the Above
- ☐ Decline to Identify

