CASE

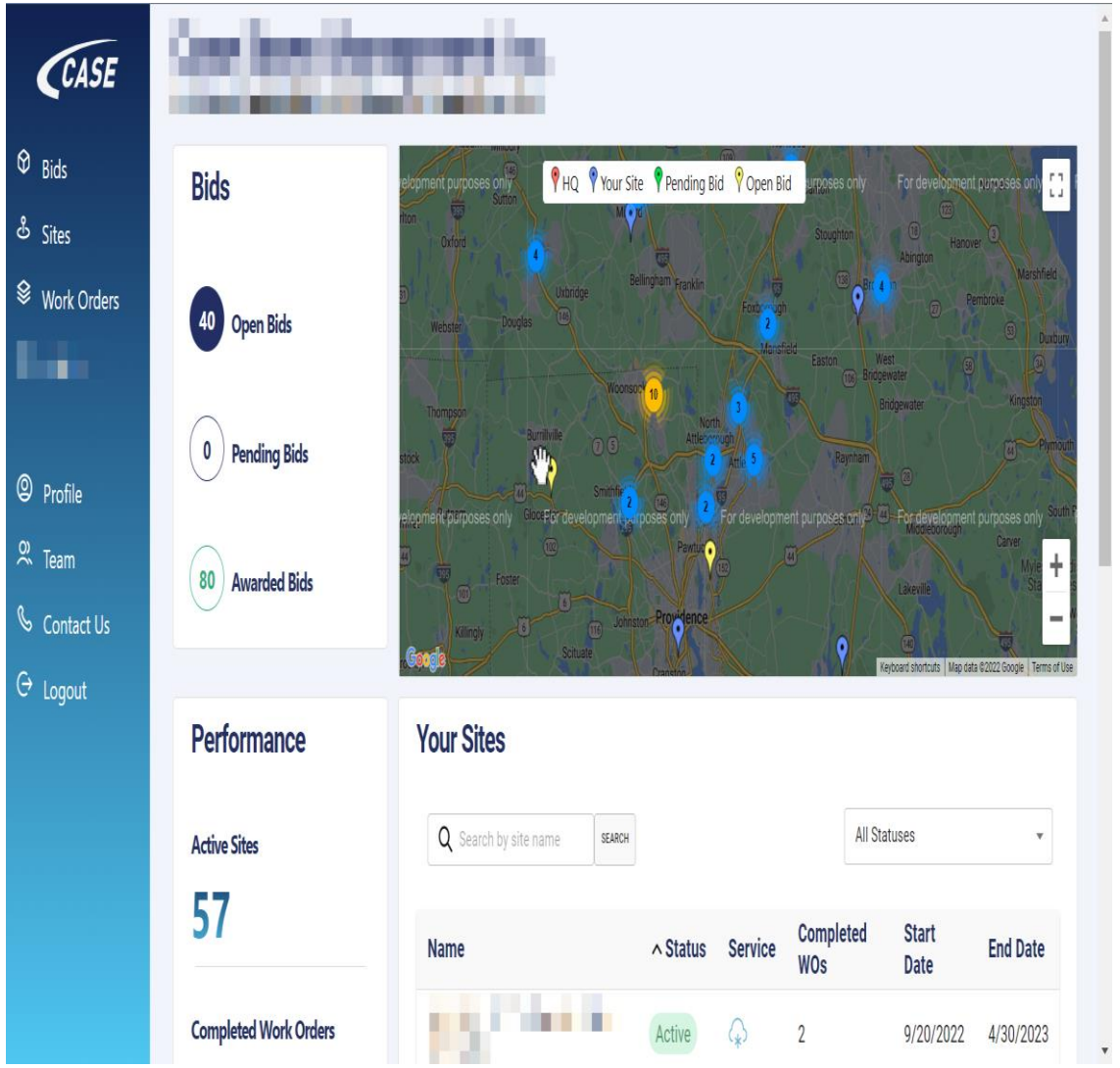
LANDSCAPE EFFECTS
– PROPERTY MANAGEMENT CORP. –

CASE Portal Benefits

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

Benefits of using the Portal include:

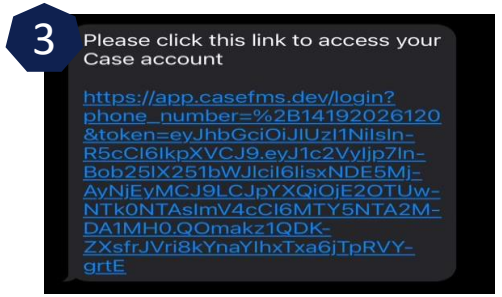
1. **Secure:** No passwords to remember. The Portal and CASE APP are magic link enabled (secure link).
2. **Dashboards:** Find open, pending, and awarded bids and quickly see sites mapped out.
3. **Grow your business:** Access open bids within the CASE Portal and get real-time status of bids.
4. **Work 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.



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



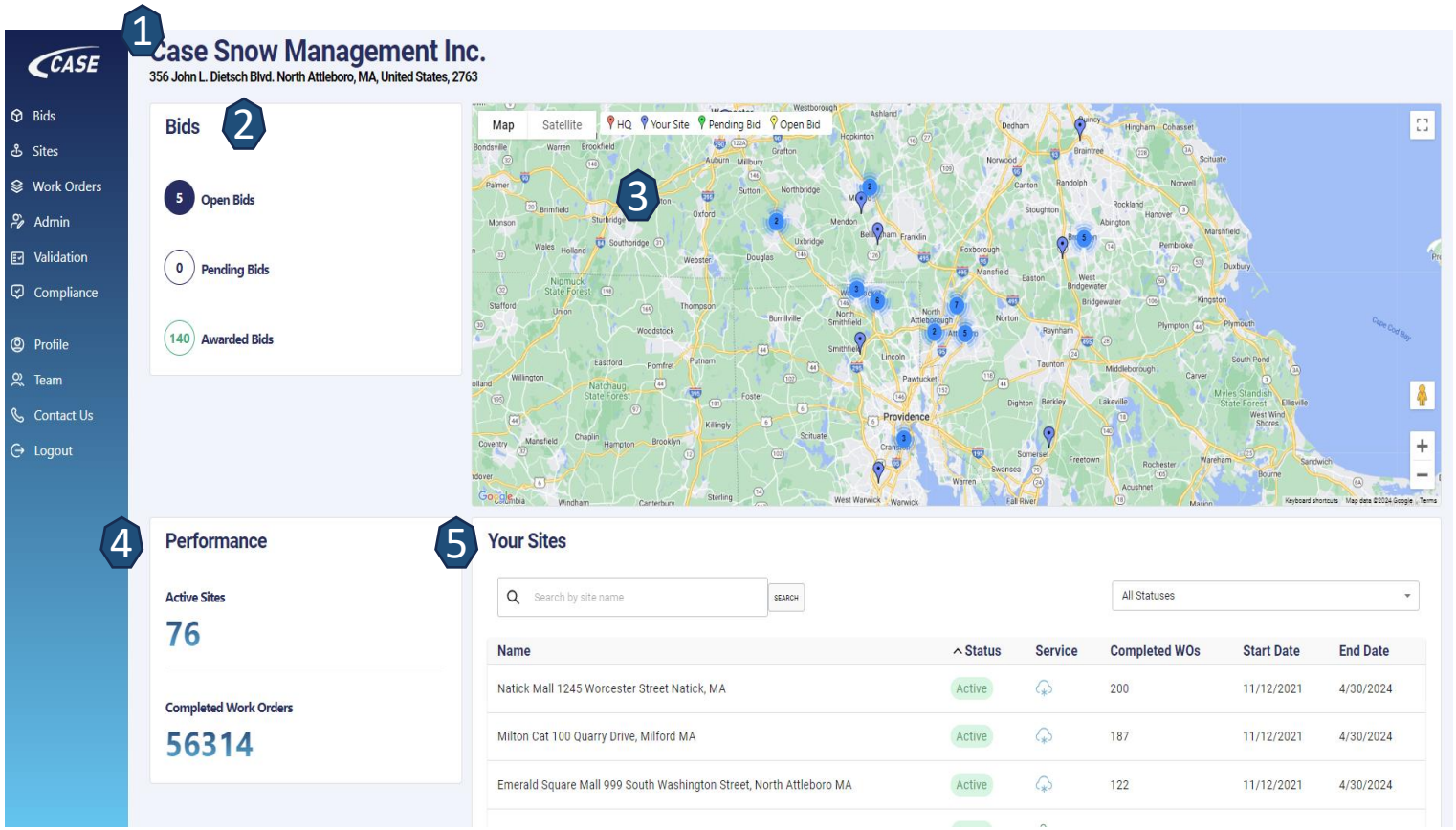
Troubleshooting steps

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

Home Page

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

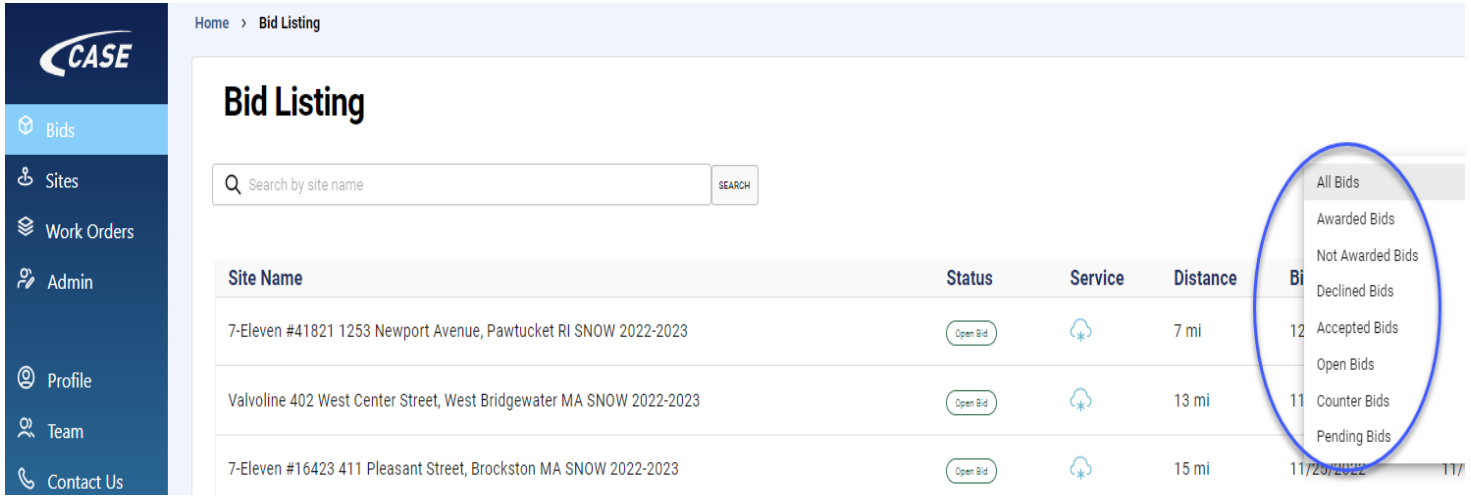


Bids

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:

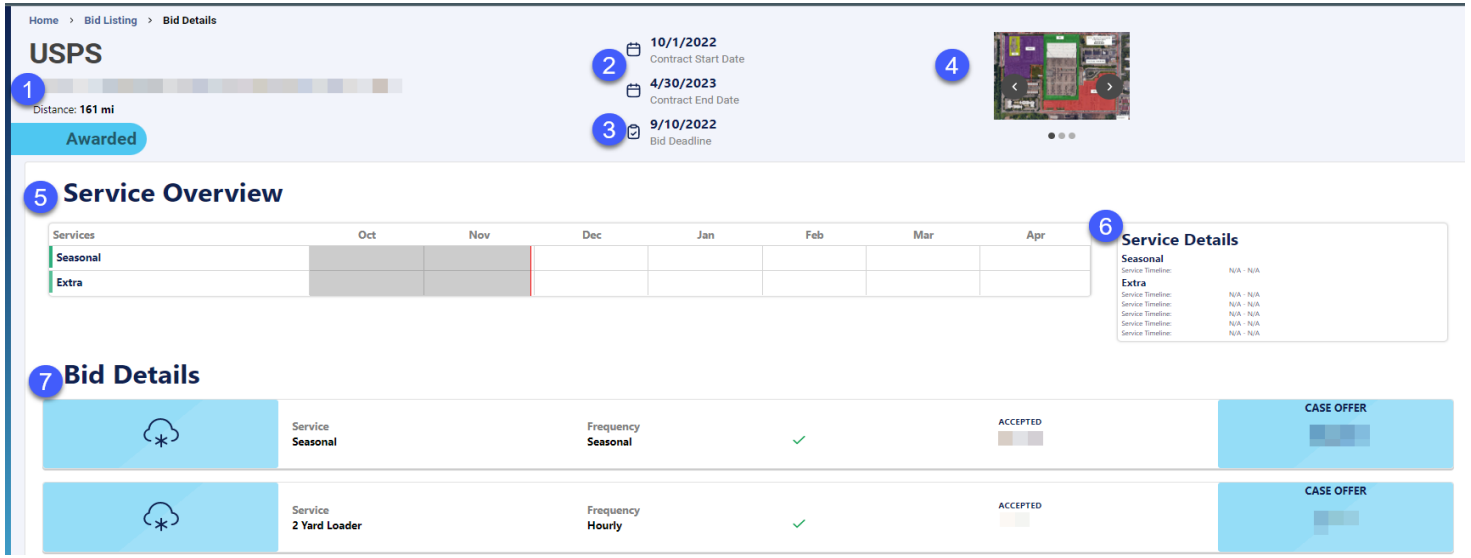
- All bids
- Awarded Bids
- Not Awarded Bids
- Declined Bids
- Accepted Bids
- Open Bids
- Counter Bids
- Pending Bids



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



Bids

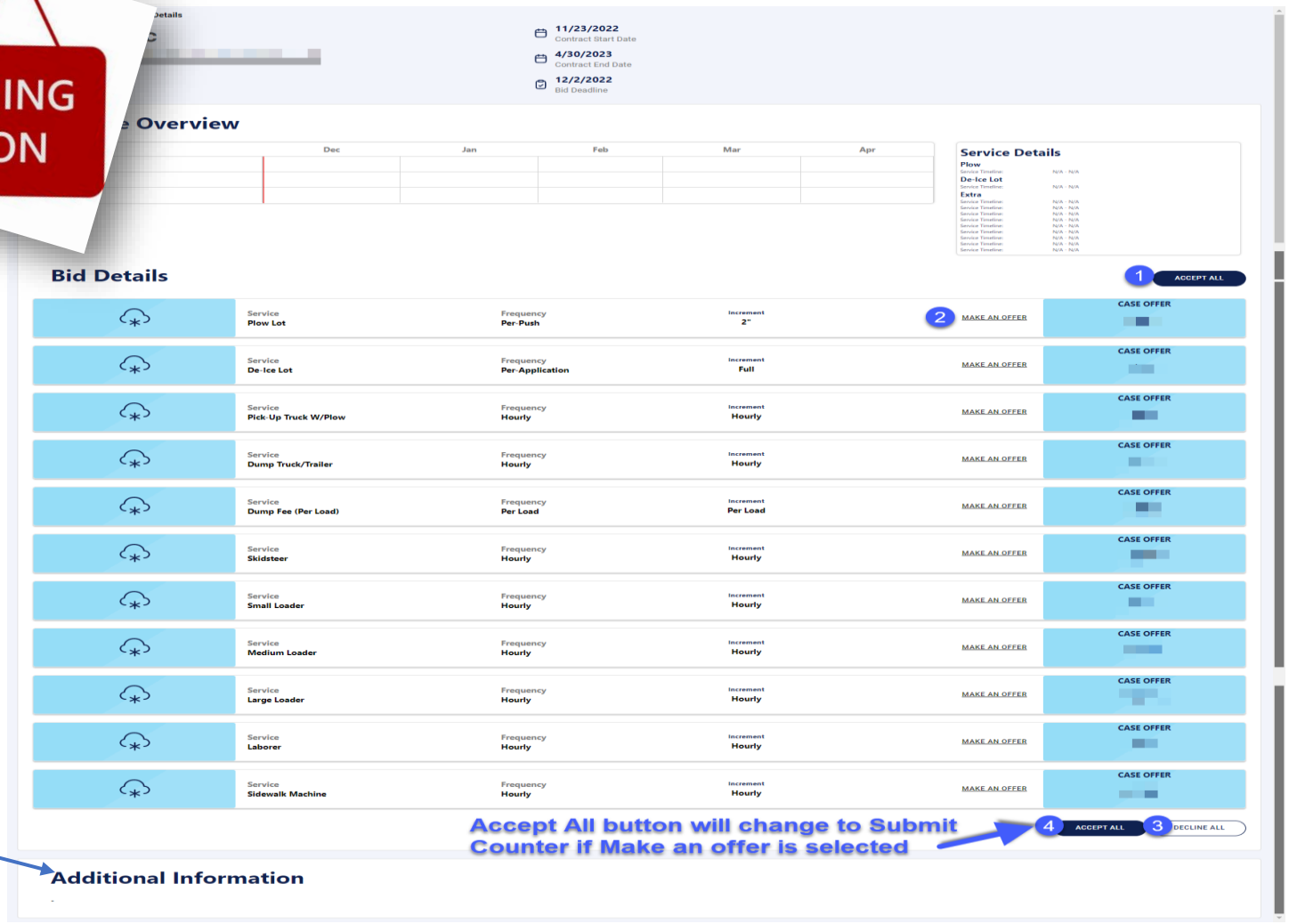
CASE has made responding to Bids quicker and easier than ever. Service Partners can easily accept, make an offer, and decline bids directly in the Portal.

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.

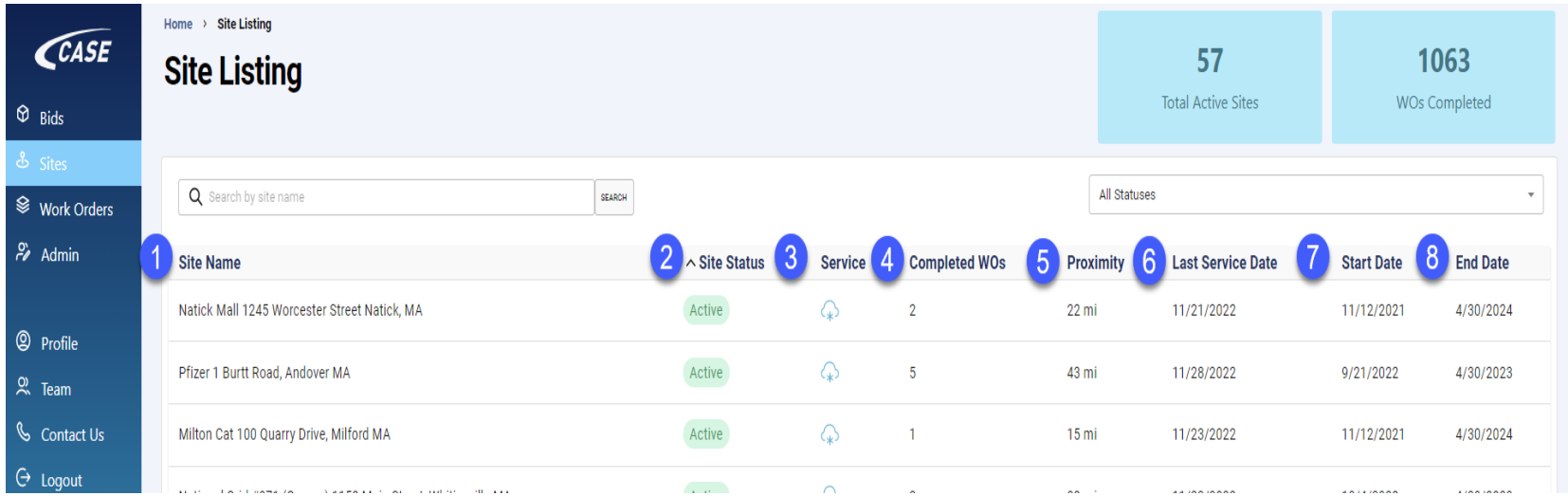


Sites

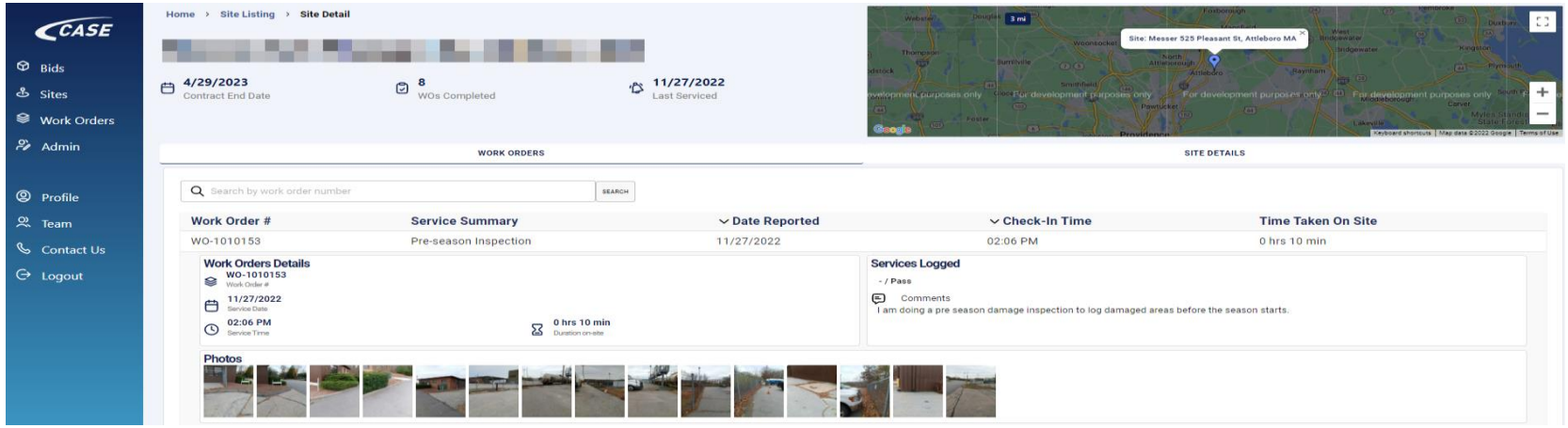
The Sites tab provides the Service Partner with a summary of sites contracted with Case/LFX.

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



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

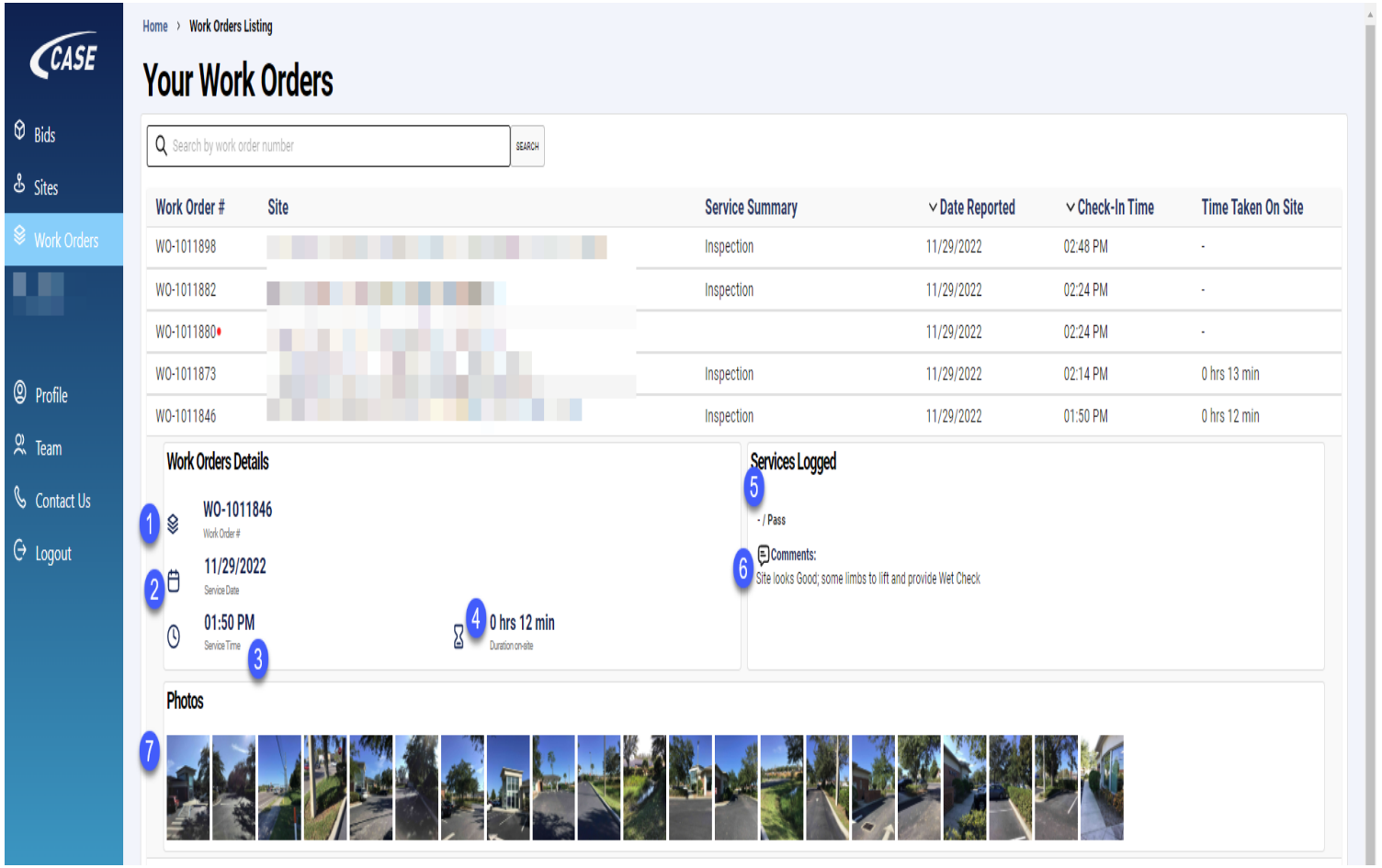


Work Orders

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.

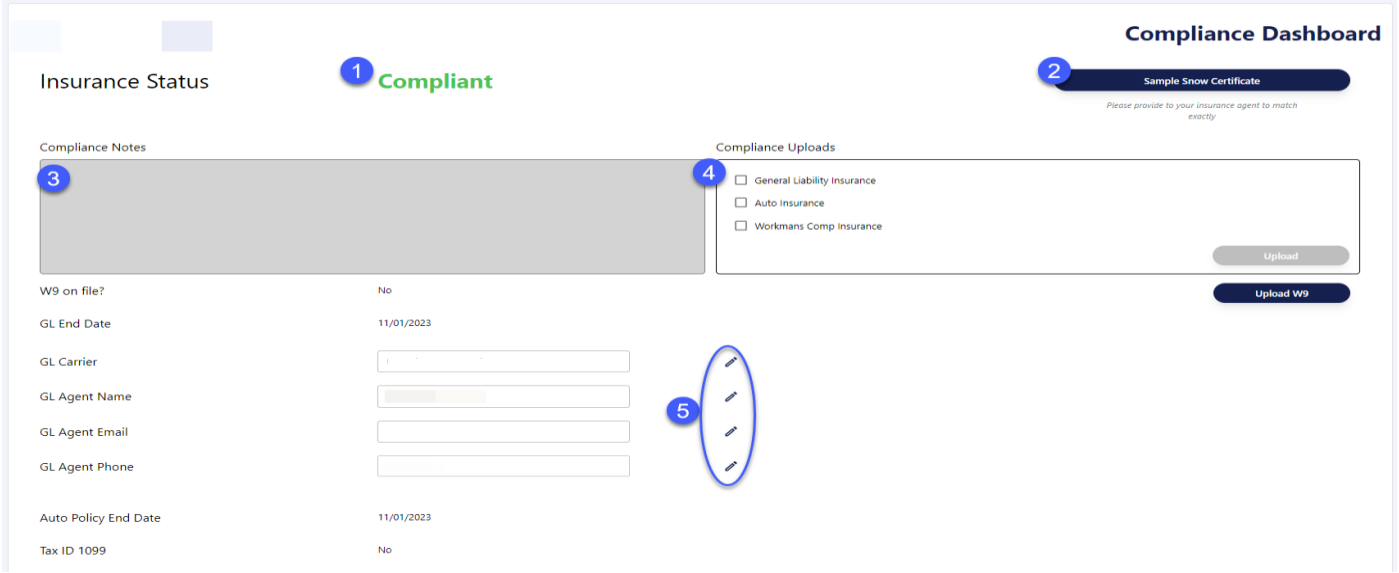
1. Work Order #
2. Service Date
3. Service Time
4. Duration on-site
5. Services Logged
6. Comments
7. Photos



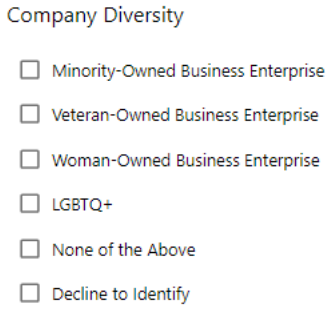
Compliance

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



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



CASE

LANDSCAPE EFFECTS
– PROPERTY MANAGEMENT CORP. –