How to Use Your Client Portal

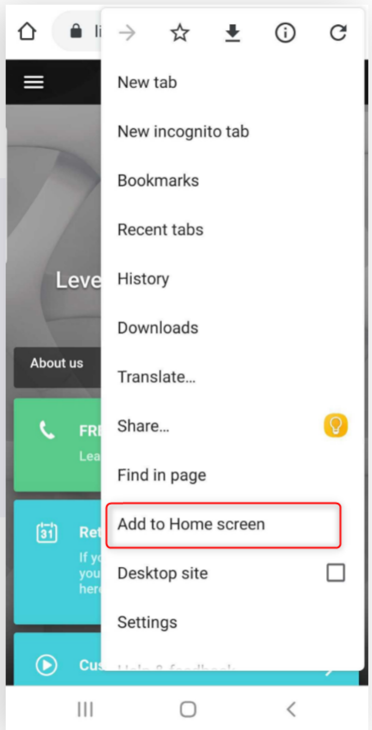
Contents

How to Use Your Client Portal

The client portal is a simple, secure way to get in touch with our business, book appointments, make payments and much more!

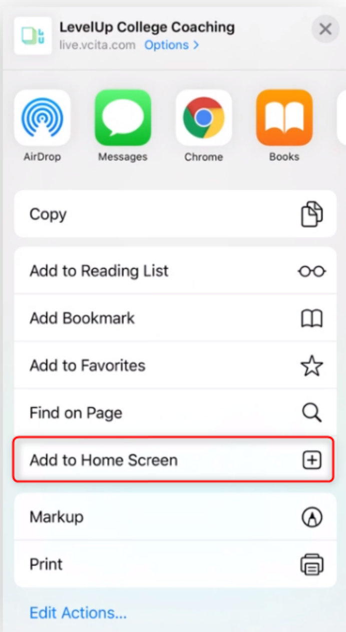
Bookmark us for Later!

We will provide you with link to our private client portal. Add us to your bookmarks list to easily reaccess the client portal in the future, or if you are on mobile, you can add a shortcut to your home screen.



Android:

1. Open the link in the Chrome Browser and click the : icon.
2. Select Add to Home Screen.



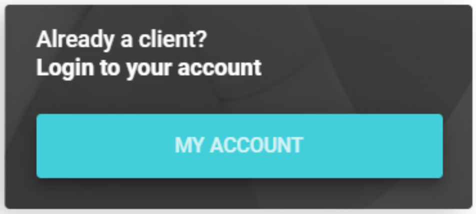
iPhone:

1. Open the link in the Safari Browser and click the icon.
2. **Select Add to Home Screen.**

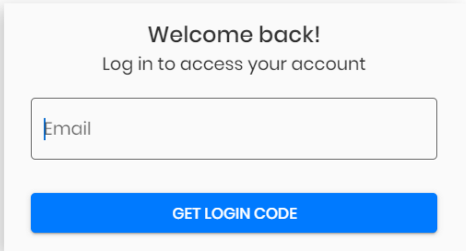
How to Log in

We will provide you with a link to our private client portal. You will need to log in to view your activities

To log in:



1. Click My Account on the right hand side.

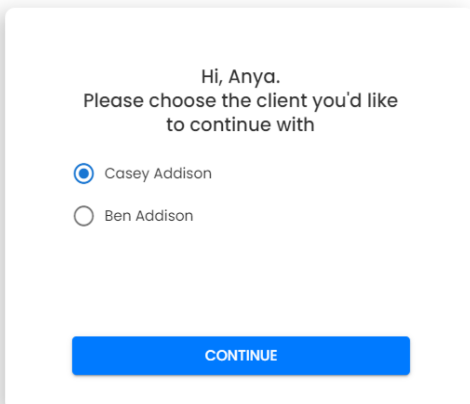


2. In the login screen, make sure to enter the email address you normally use to schedule with us.

3. If we have your phone number on file, you will receive your login code via text message. If not, you will receive an email.
4. Enter your login code.

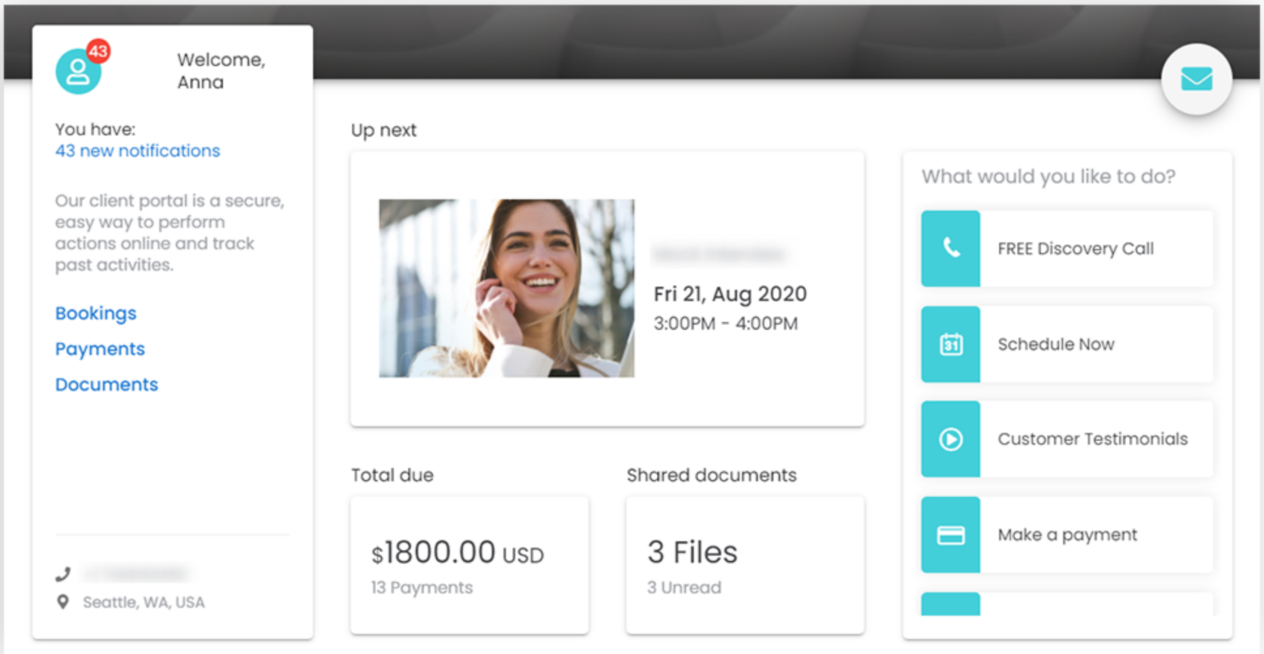
ⓘ Don't receive your login code, or prefer to receive it by email? Click on **Get it by email**. Remember to check your spam or Promotions folder. It can also help to add no-reply@vcita.com to your contacts list and try again.

5. If you have multiple items or individuals under your account, you will be asked to select one at login. You will be viewing the activity of and acting on behalf of the item you select. You can switch at any time once you're logged in.



Your Client Portal Dashboard

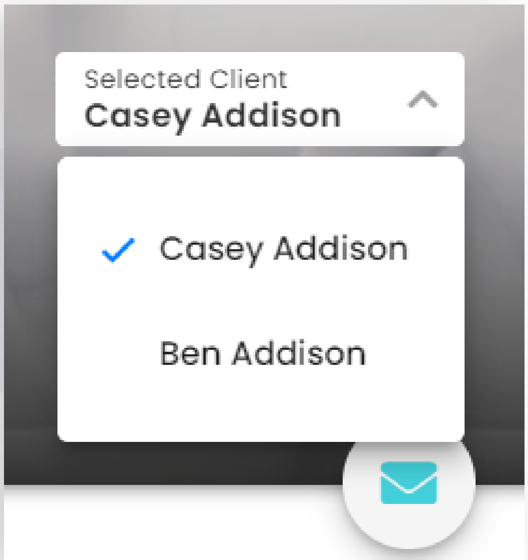
Your dashboard will give you a snapshot of any upcoming appointments, outstand-ing payments and new files available for download.



Use the left panel to view your past activity: bookings, payments, documents etc. Complete actions using the action buttons on the right panel. Click the notifications indicator to view new messages or updates.

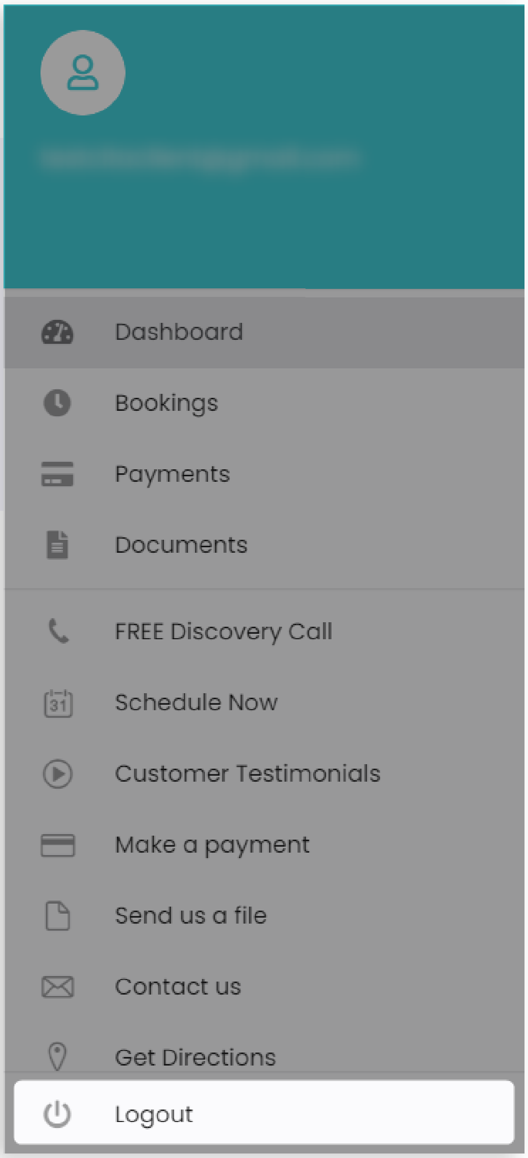
Click the hamburger ≡ icon in the top left of the window to access the quick navigation menu or **logout.**

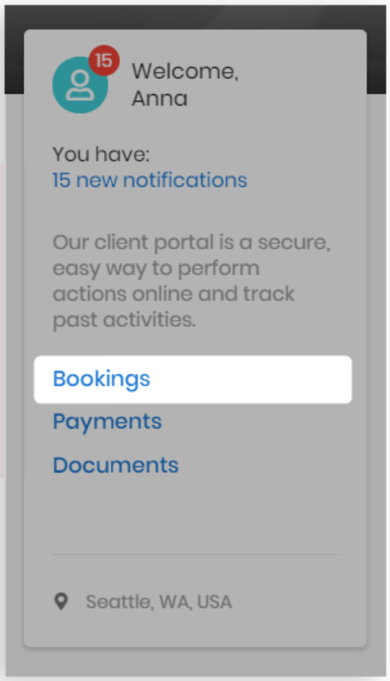
Access the dropdown in the upper right to switch between accounts.



Logging Out

When you are finished with your session, click the hamburger icon in the top left of the window and select **Logout**.



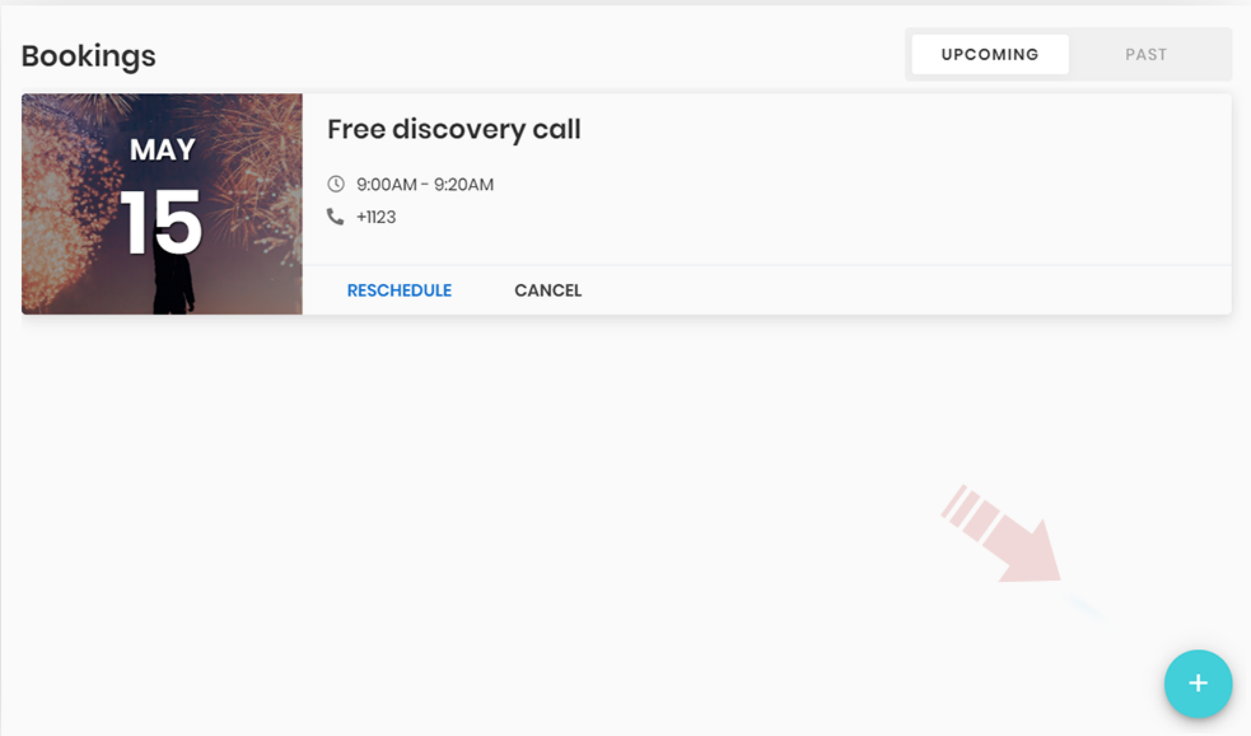


Online Scheduling

You can schedule and manage bookings from your client portal. Start by selecting the Bookings option from the menu on the left.

Booking an appointment

1. Click on the + icon in the bottom right to set a new appointment.

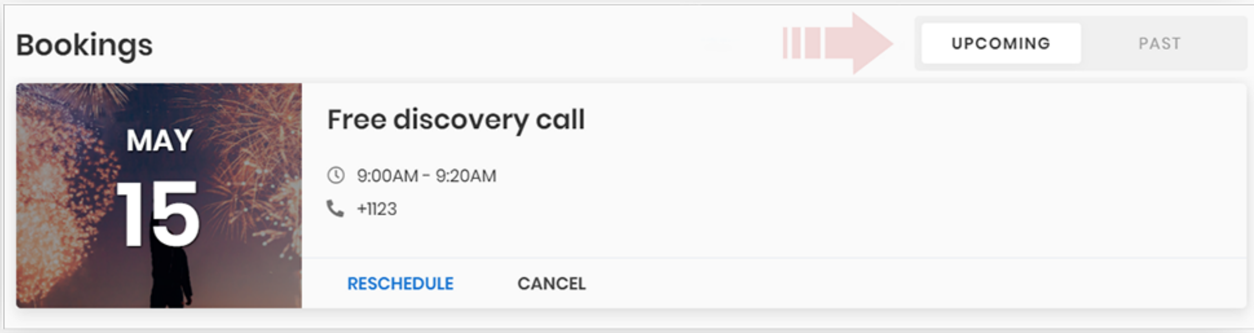


2. Select a service from the menu and then select a time slot that works for you.
3. Don't see availability? **Get in touch with us.**
4. When your booking is confirmed, you will get a booking confirmation containing appointment details. The new appointment will also appear in your client portal.

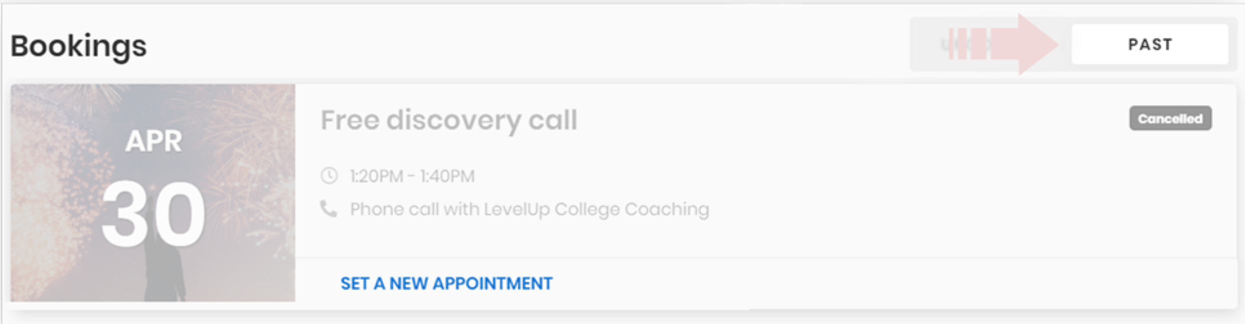
View upcoming appointments and appointment history

You can view all your upcoming appointments in your client portal, as well as your history of appointments.

Click on the Upcoming tab to view upcoming bookings.

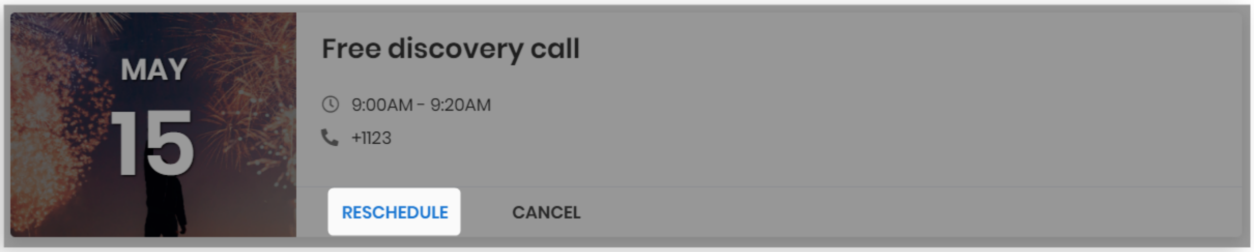


Click on the Past tab to view your appointment history.



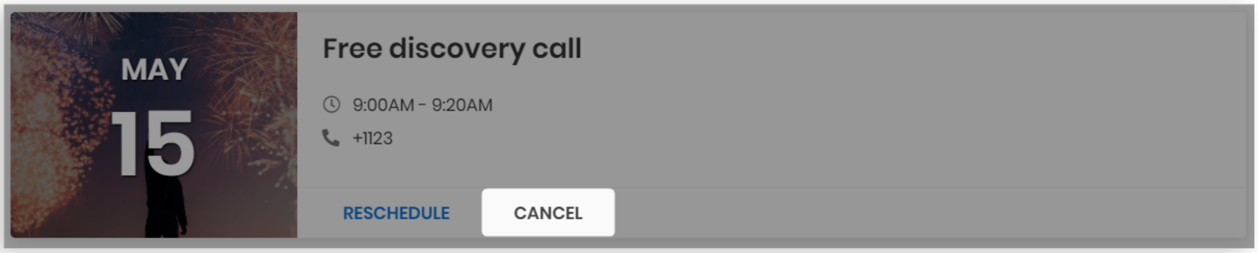
Rescheduling an appointment

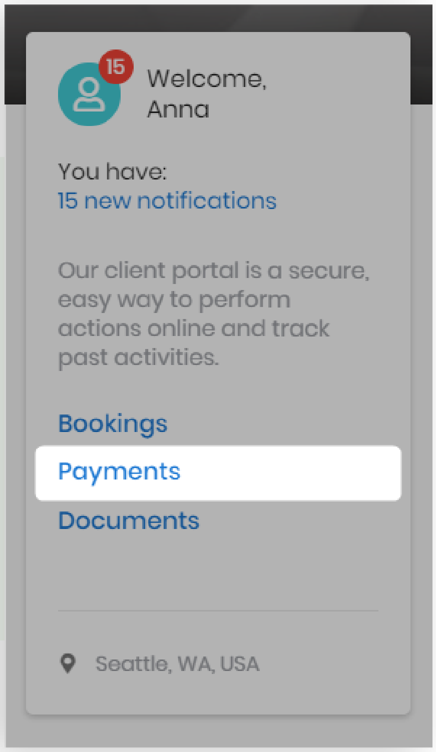
You can reschedule an upcoming appointment from the Bookings page, just click **Reschedule** under the booking.
If the reschedule option is unavailable, the window for rescheduling has passed.
Get in touch with us directly.



Cancel an appointment

You can reschedule an upcoming appointment from the Bookings page, just click **Cancel** under the booking. If the cancel option is unavailable, the window for canceling has passed. **Get in touch with us directly.**



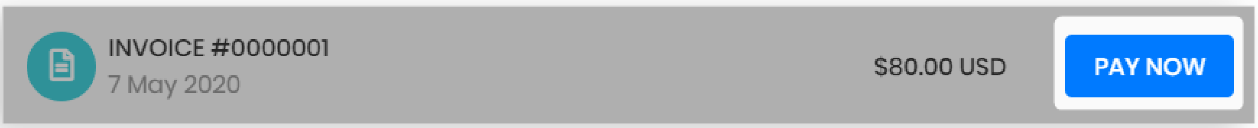


Online Payments

Easily view all your pending payments and make payments online. The client portal will keep track of your invoices and receipts for you, and you can download them at any time. To get started, select **Payments** from the menu on the left.

Make a payment

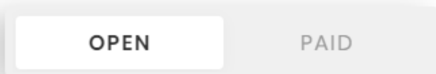
1. Click on the + icon in the bottom right to make a new payment.Or, click Pay Now next to any open payment to pay the outstanding amount.



View pending payments and payment history

You can view all your open payments and past payments you have made in the **Payments** section of the client portal.

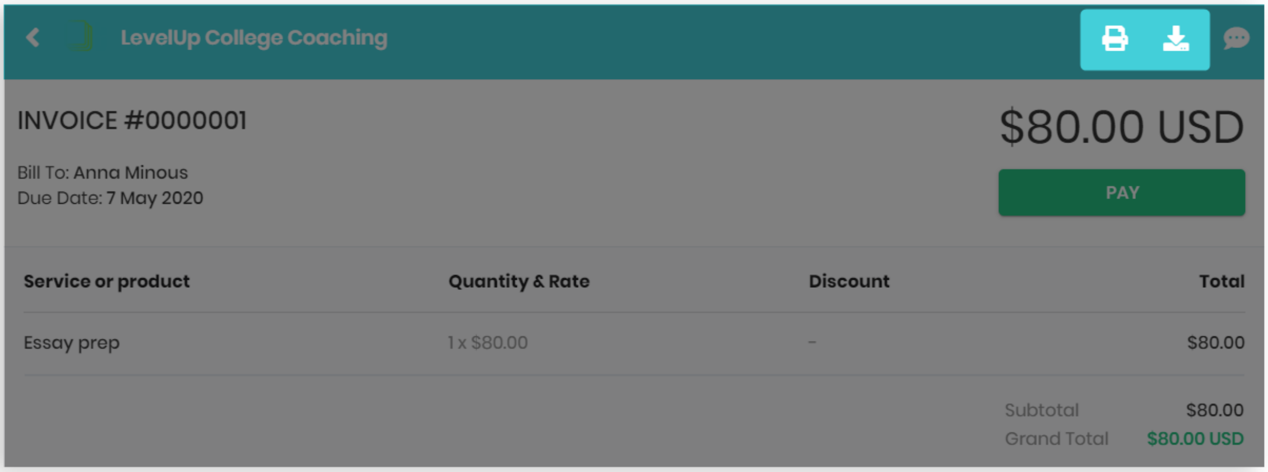
Click on the **Open** tab in the upper right to view outstanding payments.



Click the **Paid** tab to view past payments.

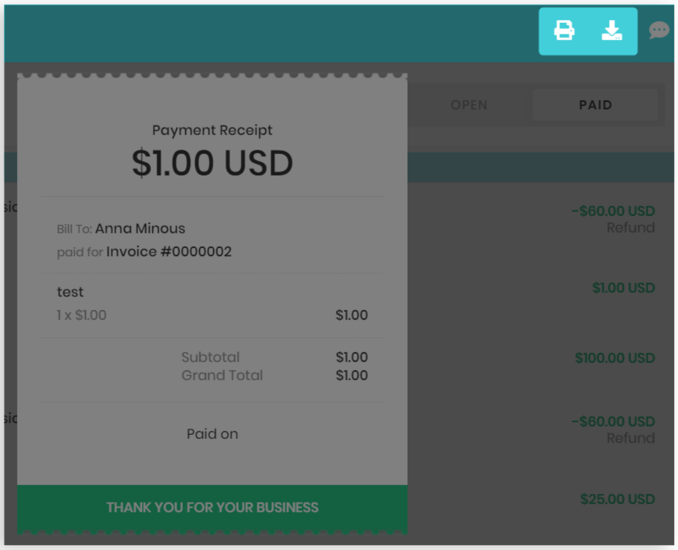
Download Invoices/Estimates

1. Click on any invoice or estimate to view the details page.
2. Click the print or download icons in the upper right-hand corner to print or download a PDF.



Download Receipts

1. Click on any past payment to view the receipt.
2. Click the print or download icons in the upper right-hand corner to print or download a PDF.



Documents

The client portal stores all the documents we have shared with you. In the Documents section, you can view and download documents, as well as share documents with us securely.

Send a Document

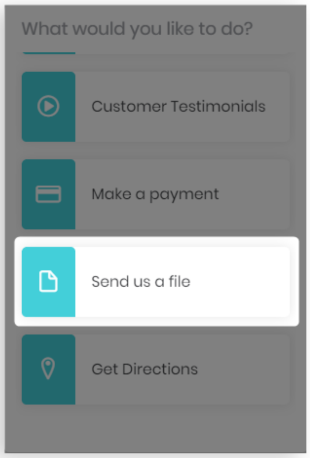
1. Select any Share Document action from the menu on the right-hand side.

2. In the popup, click on the Select your files box to select files from your local storage. You can select multiple files at once.

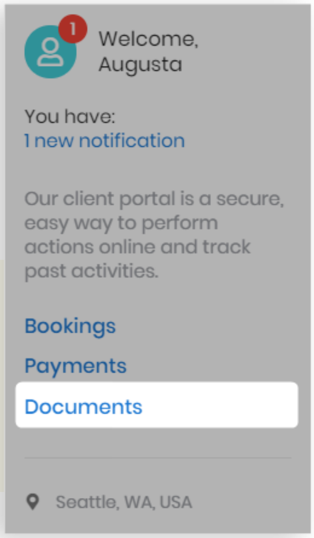
3. Give your document a name (if only one document).

4. Optionally, add a message.

5. Click Submit to send your document to us.



ⓘ **Note:** The combined upload limit is 20MB.

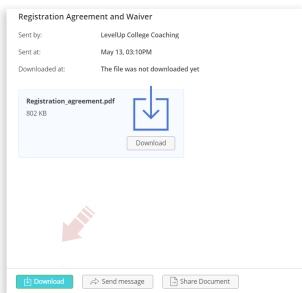


Download a Document

1. Select the Documents link from the menu on the left.

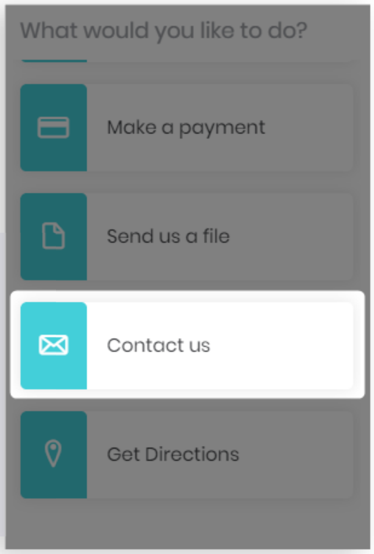
2. You will see all your documents listed. Click on the document you would like to download.

3. On the document page, click **Download**.



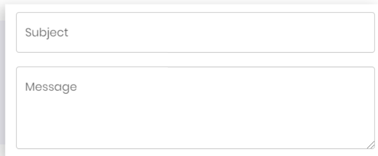
Secure Messaging

You can use the client portal to contact us at any time. Click Send message in any conversation to send us an update, or compose a brand new message.



Send a Message

1. Select any **Contact** action from the menu on the right-hand side.



2. Fill out the **Subject** line and **Message**.

3. Click **Submit** to send your message. We will be in touch as soon as possible!