

# What is the Service Portal?

Hello we are ServiceTrade! If you are reading this, you are likely a customer of one of our clients. This article will help assist you with accessing your Service Portal. Unfortunately, we cannot support you if you are having issues accessing the portal, so if you have any questions please contact your Service Company (our client.)

The **Service Portal** gives you access to the service history and upcoming services, directly from your service company's website!

Through the **Service Portal**, you can access the following features (depending on certain permissions):

- *A list of upcoming appointments, today's appointments, and recently completed jobs (completed in the past 90 days).*
- *Full job and deficiency history for each location and each asset.*
- *A list of open quotes to be approved.*

## Step 1: Requesting Access to the Service Portal

For the purposes of this article, we will be using the Aardvark Service company's Service Portal.

1. The first thing you will want to do is locate the Service Portal login area of the company's website and select "**Request an Account.**"

LOG IN TO SERVICE PORTAL

Log in to your Aardvark Service Portal to:

- Request a service call.
- See your upcoming appointments.
- Review past appointments.
- Access all the paperwork and media from past service calls.

Email/Username

Password

Login

Forgot Password

Request an Account

2. You will be prompted to create a **username** and **password** and provide an email address for your new Service Portal account.
  - **Important Note:** *The email address you select should be one that you know is associated with either a Company or Location Contact in your service company's ServiceTrade account. This email address will be the link between ServiceTrade and the info that will be displayed in your portal account. You may want to confer with your service company so that you choose a viable email address.*

**LOG IN TO SERVICE PORTAL**

Log in to your Aardvark Service Portal to:

- Request a service call.
- See your upcoming appointments.
- Review past appointments.
- Access all the paperwork and media from past service calls.

**Name**

**Email**

**Password**

**Request Access**

[Forgot Password](#)  
[Sign In](#)

3. Once all the fields are filled out click the **Request Access** button.
4. The email address you provided will be sent an email verifying that you have requested access to the portal.
5. Once your service company has accepted your request you will be sent another email confirming that your portal access is now available. Now you are ready to log into your Service Portal account.

# Step 2: How to Use the Service Portal

## Portal Information

Once you've gained access to the portal you will be given three options for data: **Service Overview**, **Locations and Assets**, **Deficiencies and Quotes**.

- **Service Overview** - a searchable list of Today's Jobs, Upcoming Jobs, and Past Jobs (completed in the last 90 days)

The screenshot shows the Aardvark Service portal interface. At the top left is the Aardvark Service logo. To the right is a navigation menu with links for Home, Products and Services, Service Areas, Service Request, About Us, and Contact. Below the navigation is a main menu with three buttons: 'Service Overview' (highlighted with an orange border), 'Locations and Assets', and 'Deficiencies and Quotes'. To the right of these buttons is a 'Log Out' link. Below the main menu are three dropdown menus: '-- All Locations --', '-- All Service Lines --', and '-- All Job Types --'. The main content area is titled 'Recently Completed Jobs (last 90 days)' and includes a search bar. Below the search bar is a table with the following columns: JOB NUMBER, LOCATION, APPT TIME, JOB DESCRIPTION, JOB TYPE, SVC LINES, and INVOICE AMT. The table contains 10 rows of job data.

JOB NUMBER	LOCATION	APPT TIME	JOB DESCRIPTION	JOB TYPE	SVC LINES	INVOICE AMT.
14317230	Red Robin #11100	06/04/18, 9:00am	Monthly Cleaning per contract #000578957	Inspection	Kitchen Exhaust Cleaning	--
14317364	Noob Town	04/26/18, 9:00am	123	Inspection	Aequator	--
14431313	Noob Town	04/06/18, 3:00pm	Testing recurring service conflict with quoting.	Inspection	Alarm Systems	\$9.02
14447315	Noob Town	04/11/18, 9:00pm		Service Call	HVAC	\$45.00
14558920	Noob Town	05/02/18, 5:45pm	123	Cleaning	Aequator	--
14829949	Noob Town 2	05/22/18, 6:30pm		Repair	Ambulance	--
14642067	Noob Town 2	05/21/18, 1:00am	yearly contract	Inspection	Beer Distribution	--
14642379	Noob Town 2	05/21/18, 1:00am	bling	Repair	Airplane Hangar Doors	--
14642458	Noob Town 2	05/21/18, 3:45am	bling	Repair	Airplane Hangar Doors	--
14646615	Noob Town 2	05/22/18, 9:00am	day 2 Quote	Inspection	Alarm Systems	--

- **Locations and Assets** - a searchable list of Assets and Locations



### Assets

Search your asset by name or serial number

**Search**

Search:

ASSET ▲	LOCATION ⇅	ADDRESS ⇅	CITY ⇅	STATE ⇅
Building	Red Robin #11100	2260 Walnut St	Cary	NC
Building	Wild Dunes Resort	1 Sundial Circle	Isle of Palms	SC
Building	Noob Town	2279 Cedar Creek Road	Youngsville	NC
Building	Noob Town 2	800 Finsbury Street	Durham	NC
Building	Noob Town 3	5559 Jessip Street	Morrisville	NC

Showing 1 to 5 of 5 entries

### Locations

Search:

LOCATION ▲	ADDRESS ⇅	CITY ⇅	STATE ⇅
Noob Town	2279 Cedar Creek Road	Youngsville	NC
Noob Town 2	800 Finsbury Street	Durham	NC
Noob Town 3	5559 Jessip Street	Morrisville	NC
Red Robin #11100	2260 Walnut St	Cary	NC
Wild Dunes Resort	1 Sundial Circle	Isle of Palms	SC

Showing 1 to 5 of 5 entries

- **Deficiencies and Quotes** - a searchable list of Deficiencies and Quotes that are filtered by Location and Service Line

Service Overview
Locations and Assets
**Deficiencies and Quotes**
Log Out

**Open Quotes**


Search:

QUOTE NUMBER	LOCATION	DESCRIPTION	SERVICE LINES	QUOTE AMOUNT	EXPIRES ON
440240	Noob Town	--	HVAC	\$750.00	--
472912	Noob Town	--	HVAC	--	04/01/18
485622	Noob Town	--	HVAC	--	--

Showing 1 to 3 of 3 entries

## Approving Quotes

The Service Portal also gives you the ability to approve or request changes to open Quotes that have been submitted to your business.



**From** **Lauren's Fire and Mechanical LLC Ltd.**  
 19000 Beach Boulevard  
 Huntington Beach, CA 92648  
 www.servicetrade.com  
 TAX ID 123456789-0

Approve

Request Changes

**Quote No.** **1325009**

Type: Repair  
 Prepared By: Lauren Rice  
 Created On: 08/28/2020  
 Valid Until: 08/28/2020

**Quote For** **Petco Corporate Headquarters**  
 Petco Headquarters  
 10850 Via Frontera  
 San Diego, CA 92127