

MyDavey Portal
USER GUIDE



OVERVIEW

WHAT IS THE MYDAVEY PORTAL?

The MyDavey Portal (MDP) is a client portal on Davey.com. It is designed for clients who prefer to engage with the local office in a digital format. MDP allows residential clients** to:

- Access online bill payment
- View upcoming services
- Accept proposals and annual plant health care renewals
- Read, watch and listen to Tree Doctor Tips, Talking Trees videos and podcasts, blog articles and other and information for their region
- See their local arborist and local office information
- Send questions to their local office via a message center

**At this time, the MyDavey Portal is limited to residential clients only.

MESSAGE CENTER WORKFLOW

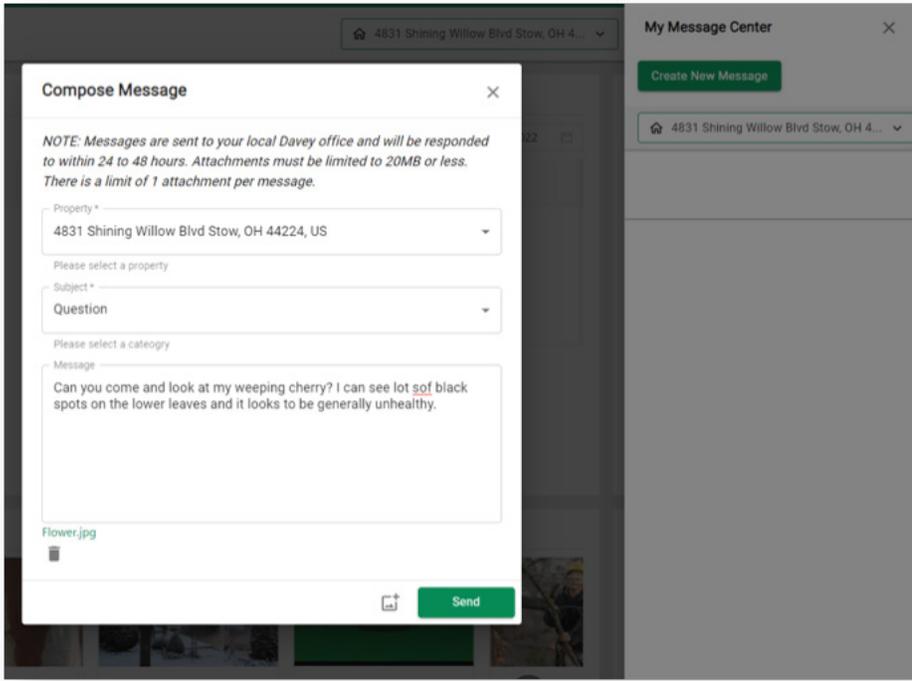
** please see the following pages for detailed screen shots and instructions*



1. Client creates a message on the MyDavey Portal (MDP).
2. MDP generates an email notification to the local office. The email is sent to the CEC1 and CEC2 fields in CRM. Please note: the client is informed that a response will be provided within 24-48 hours.
3. The local office responds via MDP. This response can be a simple acknowledgement:
 - “Thank you for reaching out Mr. Smith, we will investigate.”
 - “I appreciate your concern Mrs. Jones, I will ask Roger to call you.”
 - “I’m sorry to hear that Mr. Davis, we will stop by the property asap to address the issue.”
 - Thank you for the note Mrs. Potter, I’ll need more information to assist so will be calling you later today.”
4. CRM sends the client a notification of response.
5. The office resolves the issue as it normally would.

OVERVIEW

CUSTOMER MESSAGE CENTER

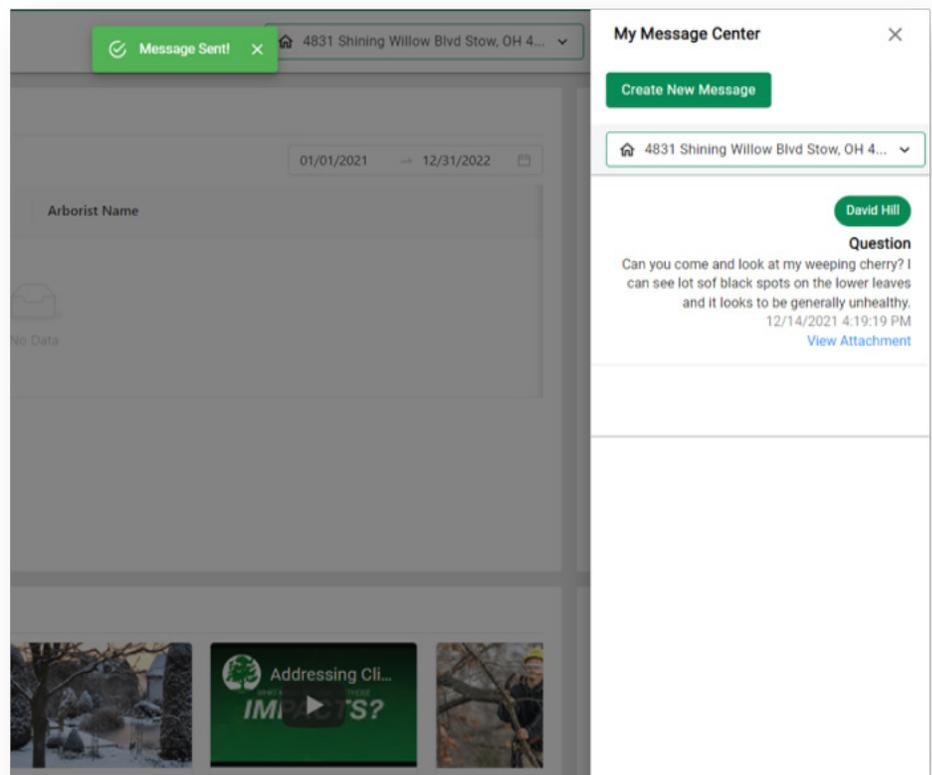


SUBMITTING MESSAGES

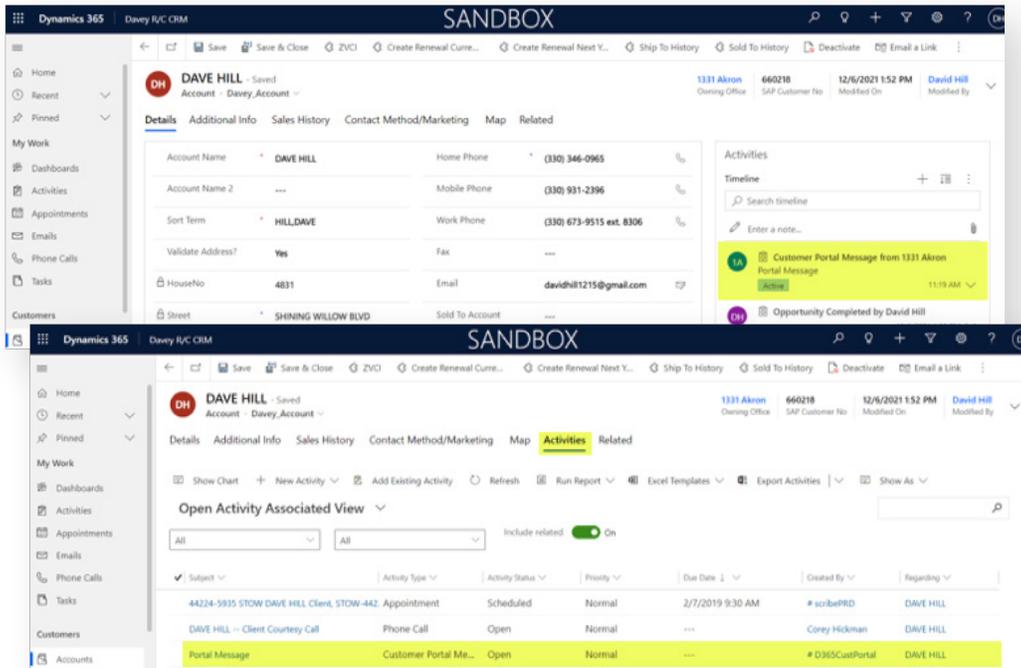
Messages can be submitted to the local office, by registered Users who have claimed an account, through the MyDavey Portal.

VIEWING MESSAGES

Once submitted, they are visible in the message center in the MyDavey Portal.



CUSTOMER MESSAGE CENTER CONTINUED

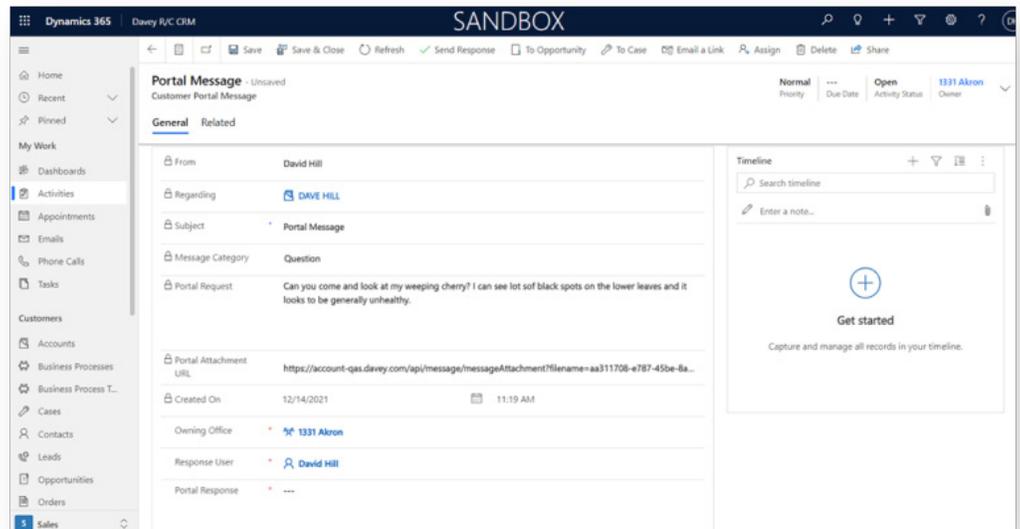


MESSAGES=ACTIVITIES

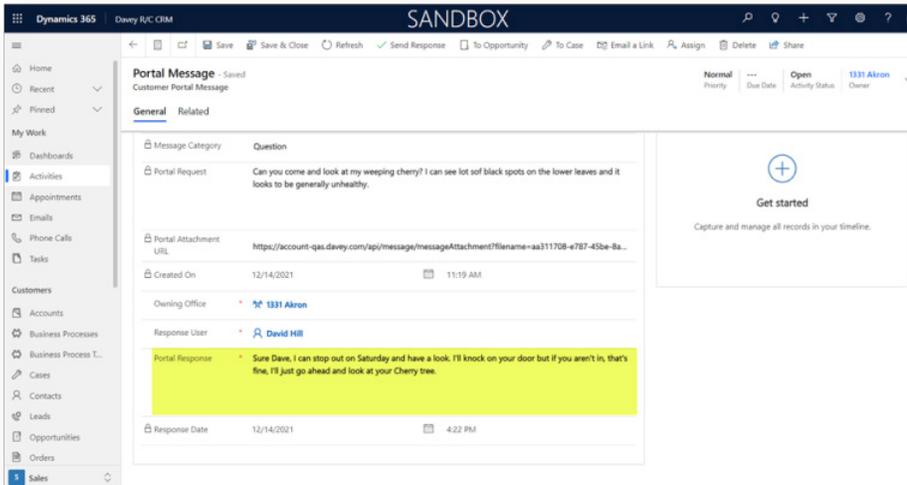
The messages are viewed as Activities (Type = Portal Message) under the CRM Account.

ACTIVITY DETAILS

Open the Activity to see full details of the message. You can click the Portal or attachment URL link to view the photo if one was uploaded by the customer.



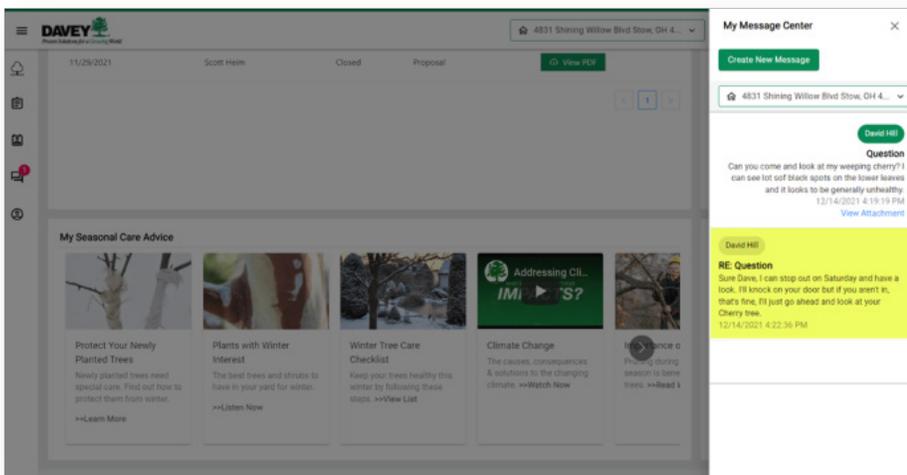
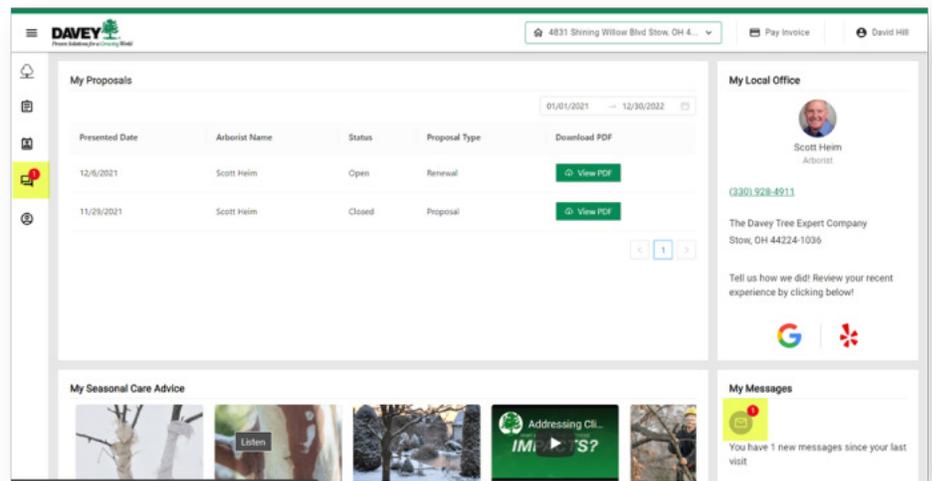
CUSTOMER MESSAGE CENTER CONTINUED



RESPONDING TO MESSAGES
The Sales Arborist or CEC can respond to the message by simply typing into the Portal Response field and clicking the Send Response button.

RESPONSE NOTIFICATION

Clients will receive an email that the local office has responded to their message. When they log back in, they will see the response in the Message Center.



VIEWING RESPONSES
The response shows in the Portal:

FAQ

- Q Who is able to use the message center on the MyDavey Portal?
A All residential clients. These clients must first register for a MyDavey Portal account by visiting account.davey.com
- Q Will I be notified when a customer submits a message?
A Yes, the team members listed in the CEC1 and CEC2 fields in CRM will receive an email notification.
- Q How quickly should I respond to a customer message?
A The MyDavey Portal informs customers to expect a response within 24 to 48 hours. This does not have to be a resolution, but a simple acknowledgment.
- Q What should I do if a client is experiencing issues with the MyDavey Portal?
A Please email portal@davey.com with the information. Clients may also contact the MyDavey Portal team directly via that address.
- Q What if the information in a proposal or renewal is different on the MyDavey Portal?
A All of the proposal and renewal information is pulled directly from existing information and SAP. MDP only displays the information in CRM and does not generate new or different information.
- Q Can customers see their proposals as soon as they are entered into CRM?
A No. Proposals and Renewals are only shown in the MyDavey Portal when they have been “Presented” in CRM.
- Q Can a customer only see their properties from a single office?
A No. The customer can add multiple properties, and these can be from different offices. The only information needed to add a property is a customer’s Ship-To account number (or a proposal number) and their ZIP code and house number.
- Q Can a customer use the MyDavey Portal to Subscribe to our email newsletter?
A Yes. They can subscribe using the “My Profile” page. This is where they can also change their email address and password.
- Q Can multiple customers add the same property?
A Yes. For instance, a homeowner and their partner could both register individually at the MyDavey Portal and both could add their property to see their proposals and contracted services. Either could accept/reject proposals. They would both see all the messages in the Message Center for that property and when they post messages, it would identify who the sender was.
- Q Can I create a MyDaveyPortal Account?
A Yes, anyone is welcome to create an account. To register you will just need your email and zip code. To unlock all features like viewing invoices and appointments, you will need to add the customer and house number associated with your account in CRM.