CUSTOMER PORTAL
USER GUIDE

How to Login

The link to our Customer Portal can be found at the top of our Internet site. Click **Login.**
Alternatively you can enter the URL below into your browser -
https://royalwolf.microsoftcrmportals.com/SignIn?returnUrl=%2F
Enter your **Account Number** and **Password** and click **Sign In.**

What is my Account Number and Password?

These details would have been sent to the email address where you receive our invoices & statements.
Your Account Number can also be found on our invoices or statements.

I have Forgotten my Password

From the login screen click the **Forgot Your Password** button.
Enter your Accounts email address. Click **Send.**
Important: You must enter the same email address where you receive our invoices and statements.
If you are still having problems logging in please email - loyalty@royalwolf.com.au

ACCOUNT

How to change your Account Information

Click on **Account**, review your account information.
If any changes are needed, click **Email Royal Wolf Accounts** button (bottom of screen).

COMPANY CONTACTS

How to change a Company Contact (your staff)

Click on **Company Contacts,** then click on the name of the person you wish to change.
Make any changes needed and click **Submit** button (bottom of screen).

How to deactivate a Company Contact (your staff)

Click on **Company Contacts,** then click on the name of the person you wish to deactivate.
Click the **Deactivate** button (bottom of screen).

How to create a new Company Contact (your staff)

Click on **Company Contacts,** then click **Create New Contact** (right).
Fill in the contact's details and click **Submit** button (bottom of screen).

<u>How to view Containers on Hire</u>
Click on **Containers on Hire**.

<u>How to return a Containers on Hire</u>
Click on **Containers on Hire**, then click the container's **Prefix**.
Click **Container Return Request** button (bottom of screen).
Complete the form and click **Submit**.
A Royal Wolf staff member will contact you to confirm the time and date for the container return.

<u>How to view previous quote requests made by you</u>
Click on **Quotes**. Any recent requests for quotes made using the Portal will be shown here.

<u>How to request a new quote</u>
Click on **Quotes** and then click **Request a Quote** button.
Fill in the form and click **Submit** button (bottom of screen).

<u>How to view an online Statement</u>
To view recent activity on your account click **Statements.**
Transactions can be sorted by clicking on the column headings.

<u>How to request a previous Statement</u>
If you need a copy of your previous statement, click the **Email Royal Wolf** button (bottom of screen).

<u>How to Pay Invoices</u>
Click **Payments,** click **Pay Invoices** and click the **Invoice Number** you wish to pay.
Check the **Remaining Amount** (bottom left) and click **Pay This Invoice**.
Note: The **Pay This Invoice** button will not appear if the invoice is fully paid.

<u>How to Update Credit Cards</u>
Click **Update Credit Card**, the final column will display the last four digits of the old card.
Click on the **Rental Contact No** you wish to update.
Click **Update Card Details** button, click **Proceed.**
Check your **Billing Information** is correct, enter your new credit card details and click **Next.**
Note: changes to your credit card details will not be instantly shown in the Customer Portal.

<u>How to make a One-Off Payment</u>
Click **Payments,** click **One-Off Payment,** enter the amount you wish to pay and click **Proceed.**
Check the **Billing Information** is correct, enter your credit card details and click **Pay.**
Note: payments will not be instantly shown in the Customer Portal.

How to Update Direct Debits

Changes to direct debits need to be made using your Bank's website.
(Direct Debits cannot be viewed, amended or setup using the Customer Portal).

How to view Invoices

Click **Invoices** and click on the **Invoice Number** you wish to view.
Invoices can be sorted by clicking on the column headings.

How to request a copy of an Invoice

Click **Invoices** and click on the **Invoice Number** you wish to view.
Click **Email this Invoice** button (bottom right).

How to Change your Password

Click on **Change Password,** enter your Old Password and enter your New Password twice.
Click **Change Password** button.

Can I share access to the Portal with others?

Yes - you may share your login details with other people.
Multiple people can use your Portal Account and the same time.

How to Sign Out

To exit the Customer Portal, simply click **Sign Out**. This will log you out.