



Client Portal Users Guide

Updated July 6, 2015

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The Tegrete Client Portal (TCP)

The Tegrete Client Portal (TCP) is an online web portal designed to expedite response time and ensure consistent communication between you and your Tegrete Account team. The portal can be used to submit requests, store records, review inspection and survey results and communicate directly with your account team.

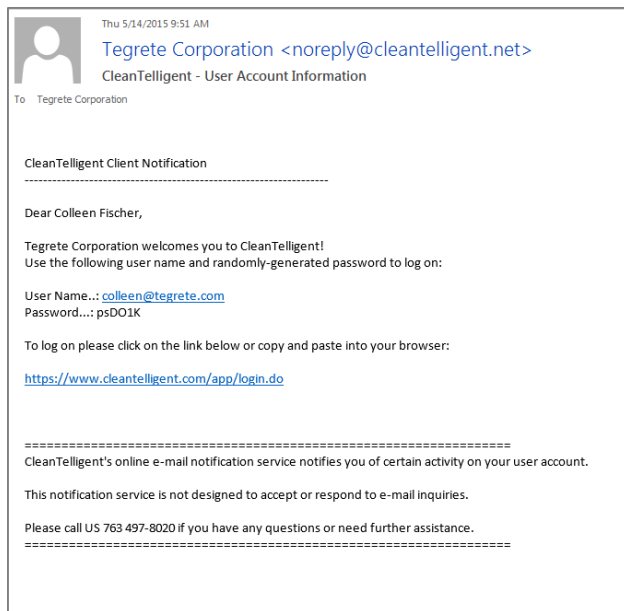
Getting Started

How do I Download the Mobile App?

1. Go to your App Store.
2. Search for CleanTelligent Mobile.
3. Install the App.

How do I get a User Name and Password to Login to TCP?

1. Your Tegrete Account Manager will provide you with access to the portal.
2. You will receive an email with your User Name and randomly generated Password.



How do I Login to TCP for the first time?

1. Go to <https://www.cleantelligent.com/app/login.do> or click on the link in your email.
2. Input your User Name and Password into the appropriate fields.
3. Login to TCP.
4. You will then be asked to sign a User Agreement and register your contact information.

How do I change my User Name/Password?

1. Click on the "My Info" Tab.
2. Click on the "Edit" link to the right of "User Information".
3. Type in a new password in the field to the right of "Password".
4. Re-type your new password in the field to the right of "Confirm Password".
5. Click on the "Save" button at the bottom of the page.

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HOME MESSAGES SERVICE LOCATIONS SURVEYS SERVICE PROVIDER REPORTS MY INFO

Contact: Colleen Fischer

USER INFORMATION

STATUS Active

USERNAME

PASSWORD

CONFIRM PASSWORD

How can I avoid typing in my User Name and Password each time I Login?

1. Go <https://www.cleantelligent.com/app/login.do>
2. Enter your User Name and Password in the appropriate fields.
3. Check the box that says “Remember.”
4. Click on the “Log In” button

LOG IN

USER NAME

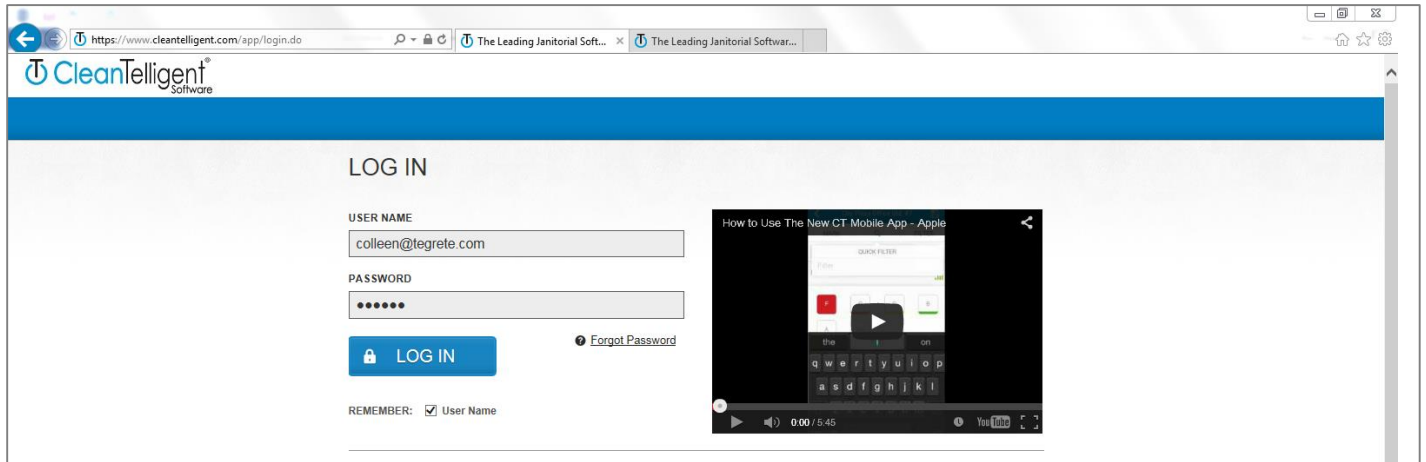
PASSWORD

[Forgot Password](#)

REMEMBER: User Name

How do I set up a link to Log In to TCP?

1. Go to <https://www.cleantelligent.com/app/login.do>
2. Save the link in your Favorites.



How do I verify/edit my contact information?

1. Click on the "My Info" Tab.
2. Click on the "Edit" link to the right of "Contact Information".
3. Look through the information, correct any information that is incorrect, and add any information that is missing.
4. Click on the "Save" button at the bottom of the page.

tegrete

MESSAGES SERVICE LOCATIONS SURVEYS SERVICE PROVIDER REPORTS **MY INFO**

Contact: Colleen Fischer

CONTACT INFORMATION [EDIT](#)

EMAIL	colleen@tegrete.com
PHONE	763-497-8020
ADDRESS	4111 Mackenzie Court NE Suite 100 Saint Michael, MN 55376 US

CURRENT STATUS	Active [As Of 5/14/15]
PREDEFINED TEXT LANGUAGE	Company Default (English)

USER INFORMATION [EDIT](#) [EMAIL USERNAME TO USER](#)


STATUS	Active
USER NAME	colleen@tegrete.com

Using TCP

Messages Tab

How do I submit a Message to Tegrete?

1. Click on the "Messages" tab.
2. Location:"
3. If there are any "Message Types" displayed under the "Message Type(s):" section, then check any boxes of those "Message Types" that apply to the message you are sending.
4. If there are "Contact Names" displayed under the "Viewing Permissions:" section, then check any boxes of those Contacts that you would like to be able to see the message you are about to submit. Some "Contact Names" will be automatically selected based on the "Message Type" selected.
5. Fill in the "Subject:" field.
6. Fill in the "Message:" field.
7. Click on the "Submit" button
8. Click on the "New Message" link.
9. Select a Service Location for which the message is related to by clicking on the drop down arrow to the right of "Service



MESSAGES
SERVICE LOCATIONS
SURVEYS
SERVICE PROVIDER
REPORTS
MY INFO

New Message

SERVICE LOCATION

SERVICE LOCATION
Select Service Location
▼
✖

MESSAGE INFORMATION

SUBJECT

MESSAGE

DUE DATE

ATTACH FILES [UPLOAD](#)

Note: You must click on "Upload" before clicking on "Submit" to attach a file to this message.

How do I reply to or add to a Message?

1. To get to the area where you would reply or add to a message either (a) click on the “Reply” button in the email notification you received regarding the message, and Login to TCP; or (b) Once in TCP, click on the “Messages” tab, click on the “Inbox” link, click on “Subject” link of that message that you want to reply to or add to, and click on the drop down area of the “Select Action” drop down box above the “Subject” and select Reply.
2. Type in your message in the box to the right of “Reply Message:”
3. Click on the “Submit” button.

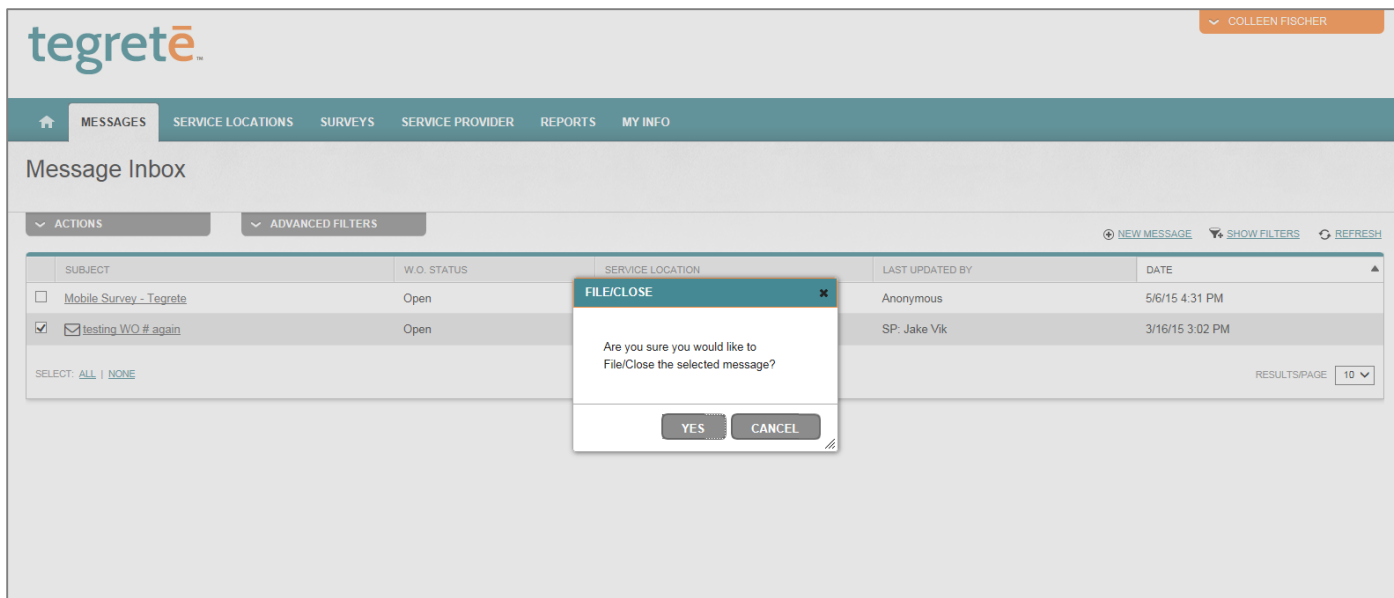
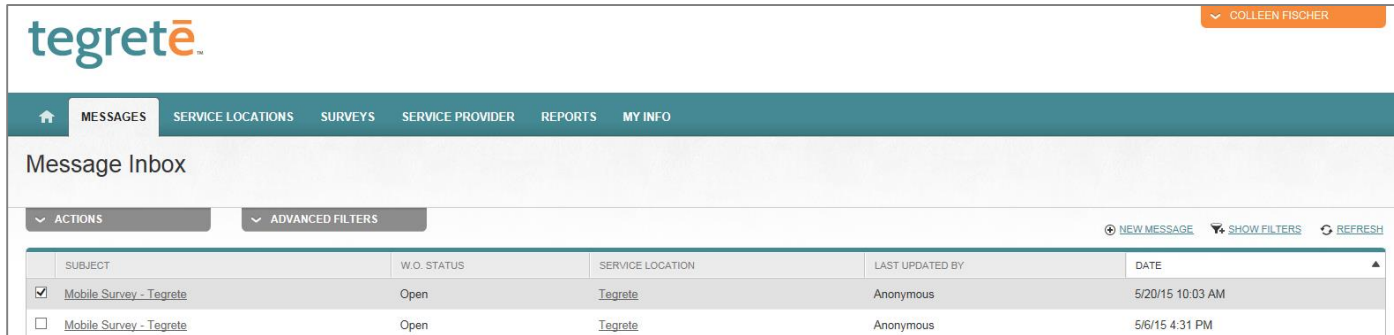
The screenshot shows the TEGRETE Message Inbox. At the top left is the TEGRETE logo. At the top right, the user name COLLEEN FISCHER is displayed. Below the logo is a navigation bar with tabs: HOME, MESSAGES, SERVICE LOCATIONS, SURVEYS, SERVICE PROVIDER, REPORTS, and MY INFO. The main heading is "Message Inbox". Below this are two tabs: ACTIONS and ADVANCED FILTERS. On the right side of the inbox, there are three icons: NEW MESSAGE, SHOW FILTERS, and REFRESH. The inbox contains a table with the following columns: SUBJECT, W.O. STATUS, SERVICE LOCATION, LAST UPDATED BY, and DATE. There are two rows of messages, both with the subject "Mobile Survey - Tegrete" and status "Open". The first row has a checked checkbox, service location "Tegrete", last updated by "Anonymous", and date "5/20/15 10:03 AM". The second row has an unchecked checkbox, service location "Tegrete", last updated by "Anonymous", and date "5/6/15 4:31 PM".

	SUBJECT	W.O. STATUS	SERVICE LOCATION	LAST UPDATED BY	DATE
<input checked="" type="checkbox"/>	Mobile Survey - Tegrete	Open	Tegrete	Anonymous	5/20/15 10:03 AM
<input type="checkbox"/>	Mobile Survey - Tegrete	Open	Tegrete	Anonymous	5/6/15 4:31 PM

The screenshot shows the TEGRETE Reply interface. At the top left is the TEGRETE logo. At the top right, the user name COLLEEN FISCHER is displayed. Below the logo is a navigation bar with tabs: HOME, MESSAGES, SERVICE LOCATIONS, SURVEYS, SERVICE PROVIDER, REPORTS, and MY INFO. The main heading is "Reply". Below this is the "REPLY INFORMATION" section, which contains a box with the following details: STATUS: Open, SUBJECT: Mobile Survey - Tegrete, and SERVICE LOCATION: Tegrete. Below this is another "REPLY INFORMATION" section, which contains a "REPLY MESSAGE" text area, an "ATTACH FILES" section with a "Browse..." button and an "UPLOAD" button, and a note: "Note: You must click on 'Upload' before clicking on 'Submit' to attach a file to this message".

How do I remove a Message from my Inbox?

1. Click on the "Messages" tab.
2. Click on the "Inbox" link.
3. Click on "Subject" link of that message that you want to remove.
4. Click on the drop down area of the "Select Action" drop down box above the "Subject" and select File/Close.
5. Click "Yes" on the pop up box.



Service Locations Tab

How do I know what Tegrete personnel will inspect at my Service Location?

1. Click on the "Service Locations" Tab.
2. Search for a Service Location by entering in a Service Location name to the right of "Service Location Name" and clicking on the "Search" button (to view all Service Locations, do not enter anything into the text box).
3. Click on the Service Location name you desire.
4. Scroll to middle of page and expand the Inspections section.
5. Go to Job Templates area and click on link pertaining to Job Template of interest.
6. NOTE: not all locations will have Job Templates.

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MESSAGES SERVICE LOCATIONS SURVEYS SERVICE PROVIDER REPORTS MY INFO

Service Location Search

SERVICE LOCATION NAME

SEARCH RESULTS

SERVICE LOCATION NAME	ADDRESS
Tegrete	4111 Mackenzie Court NE Suite 100 Saint Michael, MN 55376 US
Tegrete- North1	4111 Mackenzie Court NE Suite 100 Saint Michael, MN 55376 US
Tegrete- North 2	4111 Mackenzie Court NE Suite 100 Saint Michael, MN 55376 US
Tegrete- South	4111 Mackenzie Court NE Suite 100 Saint Michael, MN 55376 US

How do I view past Inspections?

1. Click on the "Service Locations" Tab.
2. Search for a Service Location by entering in a Service Location name to the right of "Service Location Name" and clicking on the "Search" button (to view all Service Locations, do not enter anything into the text box).
3. Click on the Service Location name you desire.
4. Go to the middle of the page to the Inspections section.
5. Click on the "Completed On" Date and time to view the Inspection results.
6. Click on the drop down next to "View:" to view past Inspections.

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MESSAGES SERVICE LOCATIONS SURVEYS SERVICE PROVIDER REPORTS MY INFO

Service Location: Tegrete- North1

MAIN INFORMATION

Current Status	Active [As Of 9/11/14]
Current Service Location Time	10:39:53 AM
Time Zone	Central Time - US (Center, North Dakota)
Phone	763-497-8020
Website	www.tegrete.com
Address	4111 Mackenzie Court NE Suite 100 Saint Michael, MN 55376 US [Get Map]

Client	Tegrete Corporation
General Frequency	
Accessibility Hours	
Price	
Square Feet	

EXPAND ALL
 COLLAPSE ALL

SERVICE LOCATION INFO

INSPECTIONS

INVENTORY

SCHEDULING AND TIME TRACKING

SURVEYS


CRM ITEMS

MESSAGES

INSPECTIONS				
INSPECTIONS VIEW: Most Recent				
COMPLETED ON	DOWNLOAD/LOAD DATE	INSPECTED BY	SERVICE DETAIL SCORE	TRACKING ITEM DETAIL SCORE
No Inspections Found.				

How do I view past Client Surveys?

1. Click on the "Service Locations" Tab.
2. Search for a Service Location by entering in a Service Location name to the right of "Service Location Name" and clicking on the "Search" button (to view all Service Locations, do not enter anything into the text box).
3. Click on the Service Location name you desire.
4. Go to the middle of the page to the Client Surveys section.
5. Click on the "Completed On" Date and time to view the Survey results.
6. Click on the drop down next to "View:" to view past Surveys.



MESSAGES
SERVICE LOCATIONS
SURVEYS
SERVICE PROVIDER
REPORTS
MY INFO

Service Location: Tegrete- North1

MAIN INFORMATION

Current Status Active [As Of 9/11/14]	Client Tegrete Corporation
Current Service Location Time 10:39:53 AM	General Frequency
Time Zone Central Time - US (Center, North Dakota)	Accessibility Hours
Phone 763-497-8020	Price
Website www.tegrete.com	Square Feet
Address 4111 Mackenzie Court NE Suite 100 Saint Michael, MN 55376 US [Get Map]	

SURVEYS			
CLIENT SURVEYS VIEW: Most Recent COMPLETE SURVEY			
COMPLETED ON			COMPLETED BY
9/11/14 11:00:00 AM - Most Recent			Jake Vik

MOBILE SURVEYS VIEW: Most Recent			
COMPLETED ON	SUBLOCATION	SECTION	
No Mobile Surveys Found.			

How do I view Message History?

1. Click on the "Service Locations" Tab.
2. Search for a Service Location by entering in a Service Location name to the right of "Service Location Name" and clicking on the "Search" button (to view all Service Locations, do not enter anything into the text box).
3. Click on the Service Location name you desire.
4. Go to the bottom of the page to the Message History section.
5. Click on the drop down to the right of "View:"
6. Choose a time frame to display results.

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MESSAGES SERVICE LOCATIONS SURVEYS SERVICE PROVIDER REPORTS MY INFO

Service Location: Tegrete- North1

MAIN INFORMATION

Current Status	Active [As Of 9/11/14]
Current Service Location Time	10:39:53 AM
Time Zone	Central Time - US (Center, North Dakota)
Phone	763-497-8020
Website	www.tegrete.com
Address	4111 Mackenzie Court NE Suite 100 Saint Michael, MN 55376 US [Get Map]
Client	Tegrete Corporation
General Frequency	
Accessibility Hours	
Price	
Square Feet	

Surveys Tab

How do I submit a Survey to Tegrete?

1. Click on the “Surveys” Tab.
2. Select a Survey by choosing a Service Location by clicking on the drop down arrow to the right of “Service Location Name”.
3. After filling out the Survey click on “Submit” at the bottom of the page.

The screenshot shows the Tegrete website's Surveys Tab. At the top, the Tegrete logo is on the left, and a navigation bar contains links for Home, Messages, Service Locations, Surveys (highlighted), Service Provider, Reports, and My Info. Below the navigation bar, the page is titled "SELECT SURVEY" and features a dropdown menu for "SERVICE LOCATION NAME" with "Tegrete- North1" selected. Underneath, the "SURVEY" section is visible, followed by a "CUSTOM QUESTIONS" section. This section includes expand/collapse controls and a question: "1. ARE YOU SATISFIED WITH SERVICE?" with radio button options for "yes" and "no".

Service Provider Tab

How do I view contact information for Tegrete?

1. Click on the "Service Provider" Tab.
2. Click on the "Service Provider Info" link.

tegretē COLLEEN FISCHER

MESSAGES SERVICE LOCATIONS SURVEYS **SERVICE PROVIDER** REPORTS MY INFO

Service Provider Information

MAIN INFORMATION

NAME	Tegrete Corporation
PHONE	497-8020
EMAIL ADDRESS	info@tegrete.com
ADDRESS	4111 Mackenzie Court NE, Suite 100 St Michael, MN 55376 US
WEBSITE	www.tegrete.com

ADDRESS

ADDRESS	TYPE	IS PRIMARY ADDRESS?
4111 Mackenzie Court NE, Suite 100 St Michael, MN 55376 US	Physical	True

PHONE

PHONE	COUNTRY	TYPE	IS PRIMARY PHONE?
763-497-8020		True	

How do I view contact information for Tegrete Personnel?

1. Click on the "Service Provider" Tab.
2. Click on the "Service Provider Employee/Contractor Info" link.
3. Select a Service Location by clicking on the drop down arrow to the right of "Service Location Name".
4. Click on an Employee/Contractor Name to view the contact information for that Employee/Contractor of Tegrete.

tegretē COLLEEN FISCHER

MESSAGES SERVICE LOCATIONS SURVEYS **SERVICE PROVIDER** REPORTS MY INFO

Search Service Provider Employee/Contractors

SEARCH RESULTS SERVICE LOCATION NAME:

NAME	POSITIONS	PHONE
Megard, Nate	Operations Manager	763-497-8020
Support, Technical	Default Position	
Vik, Jake	Account Manager	612 709-6746

ACTIVE USER

Frequently Asked Questions (FAQ)

How does TCP work?

TCP tracks and streamlines communication between you and your Tegrete account team. A message sent through TCP can be seen by the message's recipient, sender, and their supervisors. This process ensures all stakeholders are kept up-to-date on all critical communication.

Valuable data is gathered into TCP from three separate areas:

1. Communication between you and Tegrete
2. Inspections performed by Tegrete
3. Surveys completed by you

Tegrete will report back to you through TCP on issues and messages you have submitted. The status and history of messages are updated as issues are resolved, and can be easily retrieved and reviewed by you and your account manager.

Communication, inspection and survey results are tracked within TCP and used to create reports that graph the quality of performance in different areas.

How can TCP benefit me?

Storing Records—Service Location and Employee Records

You can view inspection scores, survey results and message details to know if Tegrete's contractors are providing quality work and resolving concerns at your service locations. You can also use TCP to look up the contact information for your Tegrete team.

Communicating—Universally Visible Messages

When you send a message to Tegrete through TCP, you can continue to view the contents and status of the message. If the message is filed, replied to, or reopened, it can be made known to you, confirming that your concerns are being seen and addressed.

Grouped Messages

Any responses to a message are automatically grouped with the original message. This organizes communication between you and Tegrete by topic for easy review.

Quality Reviews—Client Surveys

TCP provides "Client Surveys," which are questions designed for your locations. You can use the TCP Client Surveys to deliver accurate and precise feedback to Tegrete.

Inspections

You can review inspection results submitted by Tegrete enabling you to track performance results and improvement.

What does this mean to you?

Improved Communication and Tracking of Performance

- You Can Easily Deliver Requests– You can immediately notify responsible personnel at Tegrete of requests by easily submitting a Message or filling out a Survey in TCP.
- Tegrete Responds– Tegrete is immediately notified and responds to your requests. All responsible personnel at your company can view the response and get an email notification if desired. Back and forth communication is logged until issues are resolved and filed away (closed) for future reference.
- Tegrete Performs Inspections– Tegrete can perform detailed inspections at your locations.
- You Can Track Performance–You can view message history, surveys, and inspections, thus seeing at a glance exactly how Tegrete’s contractors are performing in each location using TCP.
- Tegrete Can Track Performance– Tegrete can also view message history, surveys and inspections, thus using such data to improve its performance at your locations. Upper management can easily track trends, improve training, and manage performance.
- Everyone Works More Efficiently – Getting Better Results. – Tegrete can address concerns more accurately, giving better results. You can more easily track performance, and receive better customer service.

Who do I call if I have questions on how to use TCP (Technical Support)?

For Technical Support on how to use TCP call your Tegrete Account Manager.

Where can I find contact information for Tegrete?

1. Log In to TCP (See Getting Started).
2. Click on the “Service Provider” Tab.
3. Click on the “Service Provider Info” link.

The screenshot displays the Tegrete web application interface. At the top, the Tegrete logo is visible. Below the logo is a navigation bar with tabs: HOME, MESSAGES, SERVICE LOCATIONS, SURVEYS, SERVICE PROVIDER (selected), REPORTS, and MY INFO. The main content area is titled "Search Service Provider Employee/Contractors". Below this title, there is a "SEARCH RESULTS" section with a dropdown menu for "SERVICE LOCATION NAME" set to "Tegrete- North 2". A table lists the search results:

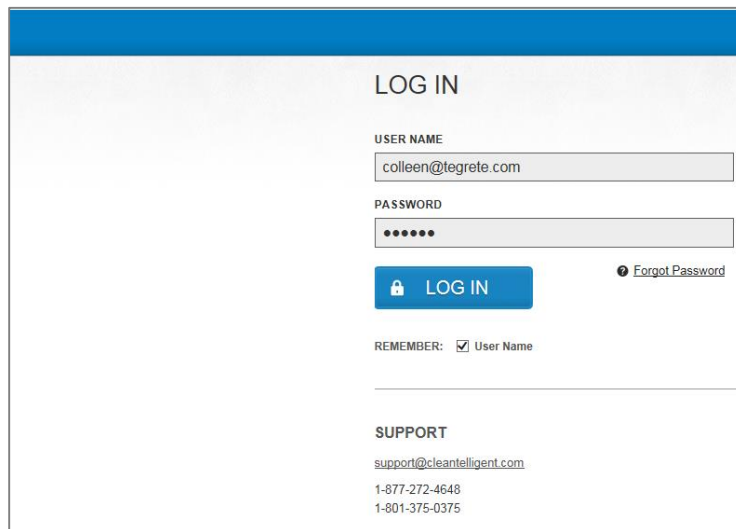
NAME	POSITIONS	PHONE
Megard, Nate	Operations Manager	763-497-8020
Support, Technical	Default Position	
Vik, Jake	Account Manager	612 709-6746

What is the website address to Log In to TCP?

You can Log In to TCP by going to <https://www.cleantelligent.com/app/login.do>

What if I forgot my User Name and/or Password?

1. If you remember your User Name, go to <https://www.cleantelligent.com/app/login.do>, click on the “Forgot Password?” link, enter in your User Name in the appropriate field, and click the “Submit” button. Your Password will be emailed to you.
2. Otherwise, contact Tegrete and we can send you your User Name and Password Reset Link.



The image shows a screenshot of a web login page. At the top, there is a blue header bar. Below it, the page title is "LOG IN". There are two input fields: "USER NAME" with the text "colleen@tegrete.com" and "PASSWORD" with six dots. To the right of the password field is a link "Forgot Password" with a question mark icon. Below the input fields is a blue button with a lock icon and the text "LOG IN". Underneath the button is a "REMEMBER:" section with a checked checkbox and the text "User Name". At the bottom of the page, there is a "SUPPORT" section with the email "support@cleantelligent.com" and two phone numbers: "1-877-272-4648" and "1-801-375-0375".