



SCHOOLEY

MITCHELL

ACCESS GRANTED

MASTERING THE ONLINE CREDENTIAL PROCESS

Wednesday March 18 2026



OUR GOAL

IS TO...

- Reiterate the **changes** to our online access policy - what it is, what it means and what it does not mean.
- Why online access is **crucial** now, more than ever, in the overall SM process.
- **Best practices** on how to develop a better, more effective approach to obtaining online access from clients.
- Question and answers with Franchisee Panel



THE WHY

Remember, we are on the same team, and our number one priority is providing the **best possible service** for you and your clients.

When illegible, unclear and incomplete scanned invoices are submitted for production, our teams simply **cannot** do their job.

When our teams can't do their job, analysis is **delayed** and your client isn't getting the best experience and will not get the **best results**.



THE WHY

When we have original invoices downloaded from the vendor's online portal, we can improve turnaround times for Production and Post Audits by using automated data extraction – more exciting news to come on this!

We estimate that this will improve turnaround time by 25%

THE WHY



Let's look at some examples of invoices that would have been subject to the new \$50 administrative fee.



REDIT PAYMENT TO:
CINTAS CORP
P.O. BOX 10007
CINCINNATI, OH 45201-0007

VIEW & PAY YOUR BILLS ONLINE:
WWW.CINTAS.COM/MYACCOUNT

CUSTOMER SVC/BILLING 888-924-6827
CINTAS FAX # 937-630-3545
PAYMENT INQUIRY 937-237-3702



INVOICE

SHIP TO: MOOREVILLE CONSOLIDATED
124 S PARK DR
MOOREVILLE, IN 46158-1757

INVOICE # 4239841557
INVOICE DATE 08/12/2025

BILL TO: THE MORGAN CORPORATION
MOOREVILLE CONSOLIDATED
12 WEST DANLISE ST
MOOREVILLE, IN 46158

SOLD TO # [REDACTED]
PAYER # [REDACTED]
PAYMENT TERMS 2% 15 NET 30
SORT # 00650001697
CINTAS ROUTE 55 / DAY 2 / STOP 01

TYPE/LOCK#	MATERIAL	DESCRIPTION	FREQ	EXCH	QTY	UNIT PRICE	LINE TOTAL	TAX
1001	4004	FB SPOT/CHRT 08/12 MOOREVILLE - 02 PREN-EXLLS	01	F	1	0.692	0.69	R
1001	4007	FB TISS/CAHART/WHIT/MARY/LS-EXLLS	01	F	2	0.521	1.04	R
1001	4044	FB CDDC FRT/CHRT/BUHACRYL/MUY-00100	01	F	11	0.573	6.30	R
1001	4070	JACKET/COTTON/MUY DUCK/LS-BOLLS	01	F	1	1.361	1.36	R
1001	4084	SHIRT/CAHART/WH DWR/KHAKI/SS-EXLLS	01	F	8	0.408	3.26	R
1001	4071	SHIRT/FR/CAHART/000120/MUY/LS-EXLLS	01	F	1	1.001	1.00	R
1001	41001	TPOUSE LAYER/M/CAHART/MUY/SS - 02 PREN-EXLLS	01	F	4	0.804	3.22	R
1001	4077	LINER LPOUS JKT/MUY TWILL-BOLLS	01	F	2	1.158	2.32	R
1001	JEFF WILLIAMS	SUBTOTAL - 19.28						
1001	4077	FB TISS/CAHART/WHIT/MARY/LS-EXLLS	01	F	5	0.521	2.61	R
1001	4044	FB CDDC FRT/CHRT/BUHACRYL/MUY-01292	01	F	11	0.573	6.30	R
1001	4070	JACKET/COTTON/MUY DUCK/LS-BOLLS	01	F	1	1.361	1.36	R
1001	4084	SHIRT/CAHART/WH DWR/KHAKI/SS - 02 PREN-EXLLS	01	F	5	0.530	2.65	R
1001	4084	SHIRT/CAHART/WH DWR/KHAKI/LS-EXLLS	01	F	4	0.408	1.63	R
1001	4071	SHIRT/FR/CAHART/000120/MUY/LS - 02 PREN-EXLLS	01	F	1	1.261	1.26	R
1001	40001	TPOUSE LAYER/M/CAHART/MUY/SS-EXLLS	01	F	6	0.610	3.66	R
1001	4077	LINER LPOUS JKT/MUY TWILL-BOLLS	01	F	2	1.158	2.32	R
1001	RITCHELL BARBER	SUBTOTAL - 22.17						
1001	4004	FB SPOT/CHRT 08/12 MOOREVILLE - 02 PREN-EXLLS	01	F	3	0.692	2.08	R
1001	4007	FB TISS/CAHART/WHIT/MARY/LS-BOLLS	01	F	5	0.521	2.61	R
1001	4044	FB CDDC FRT/CHRT/BUHACRYL/MUY - 02 PREN-EXLLS	01	F	11	0.745	8.19	R
1001	4044	FB CDDC FRT/CHRT/BUHACRYL/MUY-00100	01	F	1	1.810	1.81	R
1001	4044	FB CDDC FRT/CHRT/BUHACRYL/MUY-00100	01	F	1	1.810	1.81	R
1001	4070	JACKET/COTTON/MUY DUCK/LS-BOLLS	01	F	1	1.361	1.36	R
1001	4084	SHIRT/CAHART/WH DWR/KHAKI/SS - 02 PREN-EXLLS	01	F	8	0.503	4.02	R

Completely Illegible
Cannot verify any
services or costs.



Fees - continued

Number	Amount	Description	Total
3	839.88	DISCOVER DIGITAL INVESTMENT FEE	0.08
141	84,248.29	VS US DIGITAL COMMERCE SERVICE	6.32
144	78,618.64	VS COMMERCIAL SOLUTIONS FEE	7.86
389	219,357.05	SETTLEMENT FUNDING FEE	548.40
1	16.02	DS PSL Retail Prem	0.38
2	626.29	DS CNP Prem	13.04
1	309.99	DS Retail Prem Plus	7.07
1	213.59	DS CNP Prem Plus	5.55
2	1,060.14	VS CPS CNP DB	18.13
1	459.22	VS EIRF DB	8.24
2	2,852.60	VS Business Tier 1 Product 1	75.79
3	1,701.21	VS Business Tier 1 Product 2	32.62
1	133.64	VS US Purchasing Card CP	3.44
2	1,119.86	VS Business Tier 4 Product 2	24.83
8	4,464.60	VS Business Tier 4 Product 1	132.52
7	1,366.56	VS Non Qualification Cons CR	44.38
9	2,179.27	VS Non Qualification Business CR	70.45
5	2,333.74	VS Business Tier 5 Product 1	70.51
4	437.47	VS Business Tier 5 Product 2	10.24
1	22.29	VS VS Product 1 CR	0.56
35	30,630.46	VS VSP Product 1	769.28
4	53.97	VS VTR Product 2	1.71
2	195.99	VS VS Product 2	3.00
33	9,026.92	VS VSP Product 2	192.89
2	439.79	VS VIQ Product 2	10.31
2	143.74	VS Business Tier 2 Product 2	3.15
7	1,179.00	VS Business Tier 3 Product 1	34.31
4	5,290.54	VS Business Tier 3 Product 2	111.49
7	766.73	VS Business Card CP DB	14.08
9	1,356.90	VS Business Card CNP DB	34.13
2	469.60	VS Non Qualification Business DB	14.05
1	35.52	MC Merit1 CR	0.79
17	8,055.74	MC Corp Data Rate 1	215.19
3	2,769.38	MC Merit1 DB	46.14
2	120.29	MC World Merit3	2.49
11	12,441.01	MC World Elite Merit1	324.56
9	6,597.04	MC World Elite Merit3	152.63
1	33.63	MC Commercial Data Rate 1 Level 3	1.06
3	830.27	MC Business Level 4 Data Rate 1	24.79
3	8,866.98	MC Business Level 5 Data Rate 1	266.90
2	2,169.49	MC High Value Merit1	56.61
1	15.25	MC High Value Merit3 Base 1	0.45
1	1,238.78	MC Business Level 2 Data Rate 1	34.79
28	3,859.23	AM B2B Wholesale Tier 1	66.46
17	26,642.42	AM B2B Wholesale Tier 2	507.90
2	336.78	DS PSL Retail Rewards	6.00
3	11,954.83	VS CPS Retail Check DB	96.09
2	14.00	VS CPS Small Ticket DB	0.30
1	336.44	VS VT Product 2	5.18
4	47.74	VS REG CPS Small Ticket	0.91
112	61,450.56	VS US REG DB	55.34
1	7.90	MC Merit3 CR	0.23
6	2,127.89	MC Enhanced Merit3 Base	38.89
2	473.75	MC Merit3 DB	5.27
1		MONTHLY SERVICE FEE	4.95
1		UNSUPPORTED POS MONTHLY FEE	5.00
1		TRANSLINK MONTHLY FEE	7.50
1		NON RECEIPT OF PCI VALIDATION	125.00
1		CE: SUITE (INTELLIGENCE) S/MB	54.00
1		FIXED ACQUIRER NETWORK FEE (FANF)	55.33
384		TRANSACTION/NETWORK ACCESS FEE	55.72
47		TRANSACTION/NETWORK ACCESS FEE - AXP	6.82
45	30,501.65	AXP ASSESSMENTS	50.33

Hole Punches
 Covering numbers
 runs the risk of
 inaccurate or
 missing data.



Missing Info
Scanned on an angle
with info cut off.

Deposits - continued

Day	Reference Number	Tran Code	Plan Code	Number of Sales	Amount of Sales	Amount of Credits	Discount Paid	Net Deposit
15	90001228294	D	T	51	26,964.09	.00	.00	26,964.09
15	90001238295	D	T	01	1,069.03	.00	.00	1,069.03
16	90001248340	D	T	44	23,046.18	55.57	.00	22,990.61
17	90001258396	D	T	52	21,139.60	927.16	.00	20,212.44
17	90001268397	D	T	01	44.89	.00	.00	44.89
20	90001278449	D	T	47	31,829.73	432.54	.00	31,397.19
20	90001288453	D	T	04	786.31	.00	.00	786.31
21	90001298509	D	T	47	20,820.66	961.78	.00	19,858.88
21	90001308510	D	T	01	93.41	.00	.00	93.41
22	90001318554	D	T	37	18,028.36	227.97	.00	17,800.39
23	90001328606	D	T	41	24,509.70	1,226.34	.00	23,283.36
24	90001338646	D	T	37	15,078.76	146.35	.00	14,932.41
27	90001348679	D	T	30	18,104.81	266.79	.00	17,838.02
29	90001358725	D	T	39	25,524.47	2,139.94	.00	23,384.53
30	90001368768	D	T	35	26,195.42	542.28	.00	25,653.14
31	90001378815	D	T	44	17,650.28	248.01	.00	17,402.27
Deposit Totals				932	525,645.31	13,576.42	.00	512,068.89

Fees

Count	Amount	Rate %	Rate Per Item	Description	Fees Paid	Tot	
AUTHORIZATION FEES:							
1,035				AUTHORIZATION FEE @ \$.10	.00	103.5	
					Total Authorization Fees:	103.5	
INTERCHANGE FEES / AMERICAN EXPRESS PROGRAM FEES:							
120	42,962.58			VS TRANSACTION INTEGRITY FEE	.00	0	
688	345,242.76			BASE II SYSTEM FEE	.00	.0	
112	69,759.88			AMEX ASSESSMENT FEE	.00	129.0	
112	69,759.88			AMEX PROGRAM FEES	.00	1,386.4	
	11,702.60			DISCOVER ASSESSMENT FEES	.00	18.1	
25	11,702.60			DISCOVER INTERCHANGE FEES	.00	305.6	
155	106,790.25			MC ASSESSMENT FEES	.00	178.4	
154	107,214.85			MC INTERCHANGE FEES	.00	3,327.2	
640	337,392.58			VISA ASSESSMENT FEE	.00	537.0	
638	337,700.78			VISA INTERCHANGE FEES	.00	7,686.4	
					Total Interchange Fees / American Express Program Fees:	13,594.4	
TRANSACTION FEES:							
1,005	539,221.73			CARD BRAND FEE	.00	45.2	
					Total Transaction Fees:	45.2	
OTHER FEES:							
					NETWORK ACCESS FEE	.00	7.5
					PCI DSS MONTHLY COMPLIANCE FEE	.00	24.9
					VISA USA DIGITAL COMMERCE SERVICES	.00	9.2
					VS FANF CARD NOT PRESENT 02-07	.00	45.0
					VS FANF CARD PRESENT 18-01	.00	2.0
					NON-SWIPE TRAN FEE	.00	260.0
					Total Other Fees:	348.7	
					Total Fees Due:	14,092.0	

Discount Due	157.65
Fees Due	14,092.00
Amount Deducted	14,249.65

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PLAN CODES		TRANSACTION CODES	
VS -VISA	MC -MASTERCARD	DS -DISCOVER	JC -JCB
VL -VISA LARGE TICKET	ML -MASTERCARD LARGE TICKET	DD -DISCOVER DEBIT	AM -AMERICAN EXPRESS
VD -VISA DEBIT	MD -MASTERCARD DEBIT	DZ -DISCOVER BUSINESS DB -DEBIT	1 -PLAN ONE
VB -VISA BUSINESS	MB -MASTERCARD BUSINESS	DJ -DISCOVER JCB	2 -PLAN TWO
V\$ -VISA CASH ADVANCE	MS -MASTERCARD CASH ADVANCE	D\$ -DISCOVER CASH ADV	3 -PLAN THREE
		EB -EBT	PP -PAYPAL



749114

INVOICE

Customer ID:
Customer Name:
Service Period:
Invoice Date:
Invoice Number:

RECEIVED SEP 02 2025

How to Contact Us

Visit wm.com/MyWM

Create a My WM profile for easy access to your pickup schedule, service alerts and online tools for billing and more. Have a question? Check our support center or start a chat.



Customer Service: (619) 596-5100

Your Payment is Due

Due Upon Receipt

If full payment of the invoiced amount is not received within your contract terms, you may be charged a monthly late charge of 2.5% of the unpaid amount, with a minimum monthly charge of \$5, or such late charge allowed under applicable law, regulation or contract.

Previous Balance + 0.00

Payments + 0.00

Adjustments + 0.00

Current Invoice Charges 665.87

IMPORTANT MESSAGES

***Notice regarding personal information - We collect personal information in conjunction with accounts and depending upon your applicable state law, you may have certain rights regarding your personal information. To visit wm.com/privacy.

87A 233.00

B 99.88

D 233.05

F 99.88

C#1 Wastemanager

C#2

0901-0930

CK# 57208



Sideways

With client info and dates cut off.

**ACTIVE
DISPOSAL SERVICE, INC**
P.O. Box 1115
Somerville, NJ 08876
Phone: (908) 722-8484 - Fax: (908) 722-8485

Invoice Number
99253002

Page 1

Account Number
[REDACTED]

Invoice Date
01/31/2026



TO: [REDACTED]

Service From
01/01/2026

Service To
01/31/2026

Amount Enclosed: \$-----

Payment Terms
DUE UPON RECEIPT

Please Return Top Portion With Remittance

QUANTITY	DATE OF SERVICE	TRANSACTION NUMBER	DESCRIPTION	UNIT PRICE	TOTAL CHARGE
			PREVIOUS ACCOUNT BALANCE		860.00
			Payment Processed Check 002628		-860.00
*** Service For Location *** [REDACTED]					
1.00	01/15/2026	00597812	CONTAINER SERVICE	235.00	235.00
1.00	01/15/2026	00597812	DISPOSAL FEES	109.50	109.50
1.00	01/15/2026	00597812	STATE OF NJ RECYCLE TAX	3.00	3.00
1.00	01/31/2026	00598903	8YD FRONTLOAD 3X WEEK SERVICE	685.00	685.00
1.00	01/31/2026	00598904	8YD RECYCLING 1X WEEK SERVICE	175.00	175.00
CURRENT PERIOD CHARGES FOR LOCATION:					1,207.50
TOTAL CURRENT PERIOD CHARGES FOR ALL LOCATIONS:					1,207.50
LATE FEES:					0.00
TOTAL BALANCE DUE INCLUDING CURRENT CHARGES: \$					1,207.50

\$ 173 - 5780
 173 }
 685 } R8750
 175 }
 24
 02-04-26

**Writing on Invoice
This gets picked up
in our tools and
confuses data.**



THE IMPACT OF POORLY SCANNED INVOICES

These invoices lead to **delays, errors, and client fatigue** from having to go back and forth for necessary information.

The client is then **less likely** to accept our recommendations and implementations.



ONLINE ACCESS FIXES THIS IT'S A VITAL PART OF THIS PROCESS.

- Allows us to log in to your vendor accounts and download the invoices with little (or no) involvement from you, saving you time and disruption.
- Reduces the risk of invoices being scanned improperly or receiving invoices with missing pages.
- Post Audits with online access typically get completed earlier in the month.
- Online access allows us to review the account more thoroughly and provides us with a bigger picture.
(download CSVs in shipping, look at IMEIs in telecom, etc.)
- Providing online access saves you time each month, rather than having to download or scan invoices to send to us.



OTHER THINGS TO CONSIDER

There is more information and context in the account which helps us provide a more complete and accurate assessment.

- When implementing changes (upon client's approval), we want to be authorized to make those changes and discuss with the vendor to provide the **best cost savings**.
- We are monitoring **hundreds of accounts** per month with bills we must download. If we have to take up the clients time each month, that is time consuming for us and the client.
- It allows us to ensure the vendor is **following up** on its promise.
- It allows us to start **monitoring accounts** earlier to allow us to see what the client and vendor are doing on their end.

BEST PRACTICES FOR REQUESTING ONLINE ACCESS



Discuss online access requirements BEFORE a Service Agreement is signed.

- Introduce the concept of online access early in your conversations so that it isn't a surprise requirement post signed service agreement.
- Introduce the Post Audit's process at the beginning of the relationship and why online access will help with ongoing cost savings.
- Whenever possible, have the conversation in person.



BEST PRACTICES FOR REQUESTING ONLINE ACCESS

Be ready to discuss the requirements and benefits of online access.

- Less disruptive to the client's time.
- Provides a more complete & clear dataset for the analyst to provide the best savings.
- Quicker and more efficient time analysis – the sooner we discover savings, the sooner they can be applied!



BEST PRACTICES FOR REQUESTING ONLINE ACCESS

Be ready to discuss the security protocols in place to put your client at ease.

- Can you explain our secure client portal on a high-level? Do you understand setting up a client portal? **We have resources.**
- Do you have a client willing to vouch for you? **Ask for references,** and whether your references would be willing to have a 1:1 with a prospective client to vouch for the security and ease of set up for online access.
- Regardless of Client Relations involvement, the Franchisee is responsible for **setting expectations** of the client.

BEST PRACTICES FOR REQUESTING ONLINE ACCESS



Available: Libraries > Sales & Marketing

There are four key points in your client conversation when online access should be addressed:

1. Service Agreement Signing
2. Document Gathering
3. Implementation and Verifications
4. Post Audits

Service Agreement - Signing

"In order to do our work, we will need access to history of your vendor invoices. The most efficient way to do that, and what is typically industry standard, is to be granted access to your vendor portals. That way, we can download vendor invoices and supporting reports ourselves, saving you the time having to do so."

"While taking this tedious administrative task off of your hands is the largest benefit of online access, there is another major advantage. If we identify errors (which we often do), having direct access allows us to address them immediately. We can work with the vendor to correct the issue obtain any refunds owed to you and confirm the error doesn't continue on in future billing cycles."

"Vendor portal access helps us move faster, reduces disruption on your end and ensures that issues are resolved properly the first time around."

Service Agreement - Signed and Document Gathering

Reiterate the reasons above, plus:

"We previously discussed that obtaining online access is the most efficient way to receive your invoice and usage details. Would you prefer to share existing login credentials, or would you rather set up read-only access for us?"

"Should any errors be identified, having online access allows us to correct errors, receive refunds, and prevent them from recurring."

"We never make any changes to any account unless we have written authorization, as per our Service Agreement. This is to protect you, and also to protect us."

BEST PRACTICES FOR REQUESTING ONLINE ACCESS



Available: Production Library >
Documents > General



**SCHOOLEY
MITCHELL**

Why online access to your accounts helps Schooley Mitchell help you:

As we begin our analysis process, a representative from Schooley Mitchell may reach out to ask you about online access for your vendor accounts. While we can complete the process with copies of invoices, online access is the preferred method for us to do our jobs as effectively as possible.

The importance of online access:

- Allows us to log in to your vendor accounts and download the invoices with little (or no) involvement from you, saving you time and disruption
- Reduces the risk of invoices being scanned improperly or receiving invoices with missing pages
- Post Audits with online access typically get completed earlier in the month
- Online access allows us to review the account more thoroughly and provides us with a bigger picture (download CSVs in shipping, look at IMEIs in telecom, etc.)

We take your data privacy very seriously:

If you provide us with online access, you can trust that your data will be protected, as we:

- Never make changes to your account without written permission
- Store passwords securely and only relevant employees have access to them
- Offer you the option of sharing passwords over the phone, or via our extremely secure online client portal

Your time is money:

Providing online access saves you time each month, rather than having to download or scan invoices to send to us. Our priority is always your best interest, and that includes time efficiency and the ease of our whole process. That is why we highly recommend providing online access to relevant vendor accounts.



SECURITY CONCERNS



Client with the ability to provide us with online access may understandably be concerned with security and privacy issues. **We take the data and privacy of our clients very seriously.**

We promise the following:

- Never make changes to your account without written permission.
- Store passwords securely and only relevant employees have access to them.
- Offer you the option of sharing passwords over the phone, or via our extremely secure online client portal.

These promises protect us as well as the client. We do not benefit from making unauthorized changes to client's accounts.

SECURITY CONCERNS

Available: Marketing Download Site > Marketing Slicks



SCHOOLEY
MITCHELL

Client Data Security

To do the analytical work required to optimize expenses, Schooley Mitchell may require confidential information such as login emails, passwords, billing details and signatures. All data received from our clients is kept in a confidential manner following three crucial tenets of data security: Confidentiality, Integrity, and Availability.

CONFIDENTIALITY

All data acquired and stored by Schooley Mitchell is protected from both intentional and accidental breaches with dedicated firewalls and completely compliant with global security standards. In addition to built-in security, access to confidential information is strictly controlled to only the professionals conducting the analysis. Plus, all of our client's personal data is anonymized, and we never use their name without their specific approval.

INTEGRITY

All data provided to Schooley Mitchell is stored on our private cloud which is provided by the top-rated managed cloud company – Rackspace. Rackspace is an internationally recognized cloud computing company based out of Texas. They have robust security measures in place to protect from both intentional attack and natural disaster leading to data alteration, theft or loss. Rackspace is certified and fully compliant with ISO/IEC 27001 standards.

AVAILABILITY

All confidential data is protected with regularly scheduled on-site backups, with access strictly limited to authorized IT professionals. When connection takes place to the cloud, it's done via SSL VPN, which provide a private tunnel through the internet to access the data – keeping our activity private.

Our clients trust in us to take every measure available to safeguard their private information, and our responsibility to them is of the highest priority to us. Schooley Mitchell is committed to the safe acquisition, storage, and access of our client's sensitive data, and as technology evolves, so too do our precautions.





CLIENT PORTAL AND HOW IT CAN HELP

The Client Portal is a **secure portal** to seamlessly **receive documents and info** from clients during onboarding and carries through implementations and post audits.

Documents and information uploaded to the portal will **sync directly** with the warehouse.

If you do not know how to use the client portal reach out to training.support@schooleymitchell.com for a 1:1 call.

CLIENT PORTAL AND HOW IT CAN HELP





SCHOOLEY
MITCHELL



ABC Client

Savings **\$0.00** ⓘ



Documents

- ← Client to SM
- SM to Client
- Online Access
- Support

Blog

How to assess a SaaS platform's security.
Mar 9, 2026

Pulse

Business trends to look out for in 2026
Feb 17, 2026

Consultants

Julie Beaney
Director of Franchisee Relations
519-271-6477 x 245
Email



Documents > Client to SM

Documents

<input type="checkbox"/> Name	Date Added	Last Viewed
<input type="checkbox"/> Entities to be created	Apr 4th, 2024	×
<input type="checkbox"/> Invoices	Sep 26th, 2023	×
<input type="checkbox"/> New folder test	Jul 24th, 2024	×
<input type="checkbox"/> Docs-section-1.png	Dec 12th, 2024	×
<input type="checkbox"/> Training-Week-Session-Times.xlsx	Jul 12th, 2024	×
<input type="checkbox"/> thank-you-for-saying-no-email.docx	Jul 12th, 2024	×
<input type="checkbox"/> Schooley-Mitchell-Client-Portal-How-To.pdf	Sep 26th, 2023	×
<input type="checkbox"/> What-the-client-Sees.docx	Sep 26th, 2023	×



CLIENT PORTAL AND HOW IT CAN HELP



The screenshot displays the Schooley Mitchell Client Portal for 'ABC Client'. The top navigation bar includes the Schooley Mitchell logo and the client name. The main content area features a sidebar with navigation options: Documents, Client to SM, SM to Client, Online Access (highlighted with a green circle), and Support. The main content is divided into sections: a Blog section with an article titled 'How to assess a SaaS platform's security.' (Mar 9, 2026), a Pulse section with an article titled 'Business trends to look out for in 2026' (Feb 17, 2026), and a Documents section titled 'Client to SM' containing a table of documents. The right sidebar shows a 'Savings \$0.00' indicator and a 'Consultants' section for Julie Beaney, Director of Franchisee Relations, with contact information and a profile picture. A chat icon is visible in the bottom right corner.

SCHOOLEY MITCHELL

ABC Client Savings **\$0.00**

Documents Documents

← Client to SM

→ SM to Client

Online Access

Support

Blog

How to assess a SaaS platform's security.
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Feb 17, 2026

Documents > Client to SM

<input type="checkbox"/> Name	Date Added	Last Viewed
<input type="checkbox"/> Entities to be created	Apr 4th, 2024	x
<input type="checkbox"/> Invoices	Sep 26th, 2023	x
<input type="checkbox"/> New folder test	Jul 24th, 2024	x
<input type="checkbox"/> Docs-section-1.png	Dec 12th, 2024	x
<input type="checkbox"/> Training-Week-Session-Times.xlsx	Jul 12th, 2024	x
<input type="checkbox"/> thank-you-for-saying-no-email.docx	Jul 12th, 2024	x
<input type="checkbox"/> Schooley-Mitchell-Client-Portal-How-To.pdf	Sep 26th, 2023	x
<input type="checkbox"/> What-the-client-Sees.docx	Sep 26th, 2023	x

Consultants

Julie Beaney
Director of Franchisee Relations
519-271-6477 x 245
Email

CLIENT PORTAL AND HOW IT CAN HELP



ABC Client

Savings \$0.00 ⓘ



Documents ^

← Client to SM

→ SM to Client

🔗 Online Access

🗣️ Support

Online Access Accounts

Add

Account	Vendor	Account number	Online URL	Actions
> 📄	MerchantE	490300042122		🔗 🗑️
> 📄	CenturyLink	312163472		🔗 🗑️
> 📄		123456		🔗 🗑️
> 📄		123456789		🔗 🗑️
> 📄		123456789		🔗 🗑️

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✉️ Email



CLIENT PORTAL AND HOW IT CAN HELP



ABC Client

Savings \$0.00 *i*



- Documents ^
- ← Client to SM
- SM to Client
- Online Access
- Support

← Online Account

Save

Account <input type="text" value="Account"/>	Vendor <input type="text" value="Verizon, AT&T, Rogers, Bell, etc"/>	Account# <input type="text" value="Account#"/>	Online URL <input type="text" value="https://example.com"/>
User Name <input type="text" value="Username"/>	Password <input type="text" value="Password"/>	Confirm Password <input type="text" value="Password"/>	Pin Code <input type="text" value="1234, 123456, etc"/>

Add Security Question

Consultants

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CLIENT PORTAL AND HOW IT CAN HELP

Documents uploaded to the portal will sync directly with the Client's 'Docs' section of the Warehouse.

Vendor portal login credentials sync directly to the services section of your client's profile. They are available for file prep to access when production panels are created and the client file is prepared to move into analysis.

CLIENT PORTAL AND HOW IT CAN HELP



When creating a client portal for your client (details on the training site) you can set yourself as a notification user. You will receive email notifications as your client provides details via the portal.

Alternatively, you can access a list of additions to the portal from the Warehouse > Manage > Client Portal> Settings

Within this view you can access lists of documents that have been uploaded and login credentials that have been provided.

CLIENT PORTAL AND HOW IT CAN HELP



Client Portal Settings

Support

Credentials

Manage Documents

Client to SM Documents

Upload

All Offices All Clients Document Name

Clear Download Copy Remove

	Office	Client	Document Name	Date Uploaded	Last Viewed
<input type="checkbox"/>	Stratford-ON-004	File Prep Training 2 - Please Keep	Bogus_Burgers.zip	Sep 17th, 2025	Erin Wagler Sep 17th, 2025
<input type="checkbox"/>	Stratford-ON-004	File Prep Training 1 - Please Keep	Docs-section-1.png	Dec 12th, 2024	
<input type="checkbox"/>	Stratford-ON-004	File Prep Training 1 - Please Keep	thank-you-for-saying-no-email.docx	Jul 12th, 2024	
<input type="checkbox"/>	Stratford-ON-004	File Prep Training 1 - Please Keep	Training-Week-Session-Times.xlsx	Jul 12th, 2024	Automated Administrator Aug 6th, 2025
<input type="checkbox"/>	Stratford-ON-004	File Prep Training 1 - Please Keep	What-the-client-Sees.docx	Sep 26th, 2023	Alannah Murphy Apr 3rd, 2024
<input type="checkbox"/>	Stratford-ON-004	File Prep Training 1 - Please Keep	Schooley-Mitchell-Client-Portal-How-To.pdf	Sep 26th, 2023	

Now we will hear from our panel.



Adam Baker



David Dow



Adam Smith



Rich Bello



QUESTIONS?