

DynaLink Portal User Guide

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DYNA
FIRE

Client Care Department
ClientCare@DynaFire.com
O: 407-830-6500 ext: 8006
DynaFire.com



How-To Guide

Your step-by-step reference for navigating defects, invoices, quotes, routine activities, and more — all in one place.

Prepared by

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01 Getting Started — Setup & Login

First-Time Setup

Before you can access the Customer Portal, you'll need to complete a quick one-time setup. No IT degree required — promise.

- 1 Check your inbox**
Look for a welcome email from Uptick with the subject line containing 'Customer Portal'. Can't find it? Check your spam/junk folder first.
- 2 Click the portal link**
Open the unique link included in the email. It takes you directly to the account creation screen.
- 3 Create your password**
Choose a strong password and confirm it. Follow any on-screen strength requirements.
- 4 Log in**
Use your email address and the password you just created. Bookmark the portal URL for easy future access.
- 5 Didn't receive the email?**
Contact your DynaFire service representative and request the welcome email to be resent.

■ **Tip:** Use a desktop or laptop browser for the best experience. The portal is functional on mobile, but more information is visible on larger screens.

02 Portal Overview

Once logged in, the home dashboard gives you a bird's-eye view of your entire property portfolio. Think of it as mission control — minus the countdown clock.

Properties Map

An interactive map showing all your properties. Pin colors indicate the highest open defect severity at each site.

Activity Report

A snapshot of portfolio-wide activity: pending defect quote approvals, service quote approvals, and overdue invoices.

Your Defects

Portfolio-wide defect summary broken down by severity with monthly trend charts and asset-type breakdowns.

Routine Activities

Monthly maintenance schedule visualized for all properties over the past year.

Service Calls

A breakdown of reactive works (callouts and repairs) per month, color-coded by task stage.

■ **Tip:** From the Activity Report, click **Reports** to generate and download a *Monthly Activity Report (PDF)* or *Monthly Maintenance Report (PDF)* for your records.

03 Properties Map & Activity Report

Properties Map

The map displays all of your properties with color-coded pins. The pin color reflects the most severe open defect currently recorded at that site.

Activity Report — What to Look For

The Activity Report section is your quick-action list. It surfaces items that need your attention:

Item	What it Means	What to Do
Awaiting Approval – Defect Quotes	Quotes for defect repairs that need your sign-off	Click to expand and review/approve
Awaiting Approval – Service Quotes	Quotes for service works pending your approval	Click to expand and review/approve
Overdue Invoices	Unpaid invoices past their due date	Click to view and action

■ **Tip:** Click on any count number in the Activity Report to jump directly to a filtered list of those specific items.

04 Understanding Defects

Defects are issues identified during inspections or maintenance visits. The portal gives you full visibility into all open and resolved defects across your portfolio.

Defect Severity Color Codes

Critical

High-priority defect requiring urgent attention. Compliance or safety risk may be present.

Non-Critical

A defect that should be addressed but does not pose an immediate safety risk.

Non-Conformance

The system or asset does not conform to a relevant standard or specification.

Resolved

The defect has been rectified and closed out.

Using the Defect Charts

Defects per Month bar chart

Shows defects identified over the past 12 months. Hover over any bar for a severity breakdown, or click to open the filtered Defects Registry.

Defects per Asset Type bar chart

Shows which asset categories are generating defects. Useful for identifying recurring problem areas across your portfolio.

Severity count tiles

Quick counters for Critical, Non-Critical, and Non-Conformance open defects. Click any number to jump straight to that filtered list.

■ **Tip:** Click **Search Defects** from the dashboard to open the full Defects Registry, where you can filter by property, severity, date range, and more.

05 Routine Activities & Service Calls

Routine Activities

This section shows scheduled preventive maintenance across all properties for the current year — your proof that everything is being looked after (or a heads-up when it isn't).

Completed

Maintenance completed within the scheduled tolerance window.

**Completed
Outside
Tolerance**

Maintenance was completed, but outside the scheduled timeframe.

Pending

Maintenance is scheduled and not yet due.

**Pending
Outside
Tolerance**

Maintenance is overdue and has not yet been completed.

■ **Tip:** Use the forward/backward arrow buttons to navigate between past and future years to review historical compliance or upcoming scheduled work.

Service Calls

Service Calls covers reactive works — callouts and repairs that occur outside of the scheduled maintenance programme.

Ready

Task is created and ready to be assigned or actioned.

In Progress

A technician is currently working on this task.

On Hold

Task is paused, awaiting parts, access, or approval.

Performed

Work has been carried out; awaiting final close-out.

Complete

Task has been fully completed and closed.

Cancelled

Task has been cancelled and will not proceed.

06 Documents

The portal stores two types of documents — client-level documents that apply across your account, and property-specific documents attached to individual sites.

Document Type	Where to Find It	How to Access
Client Documents	Top-right corner of the portal home screen	Click Documents in the navigation
Property Documents	On the individual Property page	Navigate to the property, scroll to the Documents section

To open or download any document, simply click its name in the list.

07 Navigating a Property Page

Clicking on any property name opens the dedicated Property page — a deep-dive into everything related to that specific site.

Property Overview Tiles

At the top of the Property page, four information tiles give you quick access to key details:

Details

General information about the property — address, site contacts, and key data.

Building

Structural and system information relevant to the site.

Access

Access notes and instructions for technicians visiting the site.

Contacts

Key contact people associated with this property.

Quick-Access Count Tiles

Below the overview tiles, you'll find clickable count tiles. Each tile shows a count of active items and takes you straight to the filtered list when clicked:

- ESMs (Emergency Service/Management items)
- Assets
- Open Tasks
- Open Defect Quotes
- Unpaid Invoices

Programme Maintenance Schedule

The maintenance schedule shows all planned routine services for the property across the year, organized by frequency level.

1**Read the color**

Each maintenance frequency block is color-coded to show its current status (see Section 05 for the full color key).

2**Click a level**

Click on any frequency block to see the full service name, associated task reference number, and current task status.

3**Navigate years**

Use the arrow buttons to move between past and future years to review compliance history or upcoming schedule.

Latest Reports

The property page also shows the most recent inspection and service reports. Click any report title to open and download it, or click **Search all reports** to browse the full report history.

08 Searching, Filtering & Favourites

The portal is only as useful as your ability to find what you're looking for. Fortunately, Uptick makes filtering genuinely painless.

Opening Lists & Overlays

Clicking on most tiles, charts, and count numbers throughout the portal opens an overlay panel with a filtered list of relevant items. To close the overlay and return to the main view, use any of these:

- Click the **X** button
- Click the **back arrow**
- Press your browser's **Back** button
- Press the **Esc** key

Using Filters

- 1 Open the list you want to filter**
Navigate to the relevant registry (e.g., Defects, Invoices, Tasks).
- 2 Use the search field**
Type a keyword, property name, or reference number to narrow the results.
- 3 Add a filter**
Click **Add Filter** and select a filter type — such as Property, Status, or Date Range.
- 4 Remove a filter**
Click the **minus (–)** icon next to any active filter to remove it.
- 5 Combine filters**
Multiple filters can be active at once, allowing precise results across large portfolios.

Saving Filter Combinations as Favourites

If you frequently apply the same set of filters, save them as a Favourite to skip the setup next time:

- 1 Set up your filters**
Apply all the filters you want to save.
- 2 Click Favourites**
The Favourites option appears within the filter panel.
- 3 Name and save**
Enter a descriptive name for this filter set and click **Add**.

4**Reuse anytime**

Your saved Favourites will appear in the Favourites list whenever you return to that registry page.

09 Color Code Quick Reference

A quick-reference cheat sheet for all color codes used throughout the portal. Print this page and stick it to your monitor — you're welcome.

Defects

Critical

Urgent – safety or compliance risk present

Non-Critical

Should be addressed; no immediate safety risk

Non-Conformance

Does not meet relevant standard or specification

Resolved

Defect has been fixed and closed

Routine Activities

Completed

Done within the scheduled tolerance window

Completed Outside Tolerance

Done, but outside the scheduled timeframe

Pending

Scheduled maintenance not yet due

Pending Outside Tolerance

Overdue – maintenance has not been completed

Service Calls (Tasks)

Ready

Task created, ready to be actioned

In Progress

Technician is currently working on this

On Hold

Paused – awaiting parts, access, or approval

Performed

Work carried out; pending final close-out

Complete

Fully completed and closed

Cancelled

Will not proceed

Programme Maintenance

Forecasted	Planned but task not yet created
Task Created	Scheduled task exists in the system
Completed Within Tolerance	Completed on schedule
Completed Outside Tolerance	Completed, but outside scheduled window
Not Completed / Outside Tolerance	Overdue and not yet done