

Database - Bulk Account Portal Invite Changes - (14657)

Last Modified on 01/26/2023 3:41 pm EST

The following improvements have been made to the *Bulk Account Portal Invite* screen.

1. New Filters:

- Division (Required)
- Account Class
- Accounts With Automatic Payment (check box selection)

2. Updated Filters:

- Bill Group is no longer required

3. Load button added to load the screen based on the filter selections.

- Upon Load, the following counts display and are a hyperlink to a breakdown of the user accounts it includes:
 - Total Count
 - Active Services Count
 - Portal Invite Accepted
 - Invite Acceptance Pending
 - Portal Invite Not Sent

4. Send Email is available for selection after 'Email From' and 'Notification Template fields' are populated.

The screenshot shows the 'BULK ACCOUNT PORTAL INVITES' interface. It features several filter fields: 'DIVISION' (set to 'CORPUS'), 'ACCOUNT CLASS', 'BILL GROUP', 'ACCOUNT SOURCE', and 'SITE SOURCE'. There are also 'EMAIL FROM' and 'NOTIFICATION TEMPLATE' fields. Below the filters are four checkboxes: 'Accounts with Active Services', 'Accounts with Balance Due', 'Restrict to Billing Contacts', and 'Accounts without Automatic Payment'. A note states: 'For new & unactivated contacts, a new temporary password will be generated and sent to the contact. No notifications will be sent to contacts that have already accepted an invitation.' At the bottom right, there are 'LOAD' and 'SEND EMAIL' buttons. In the center, a summary table shows counts for various categories.

Total Count	Active Services Count	Portal Invite Accepted	Invite Acceptance Pending	Portal Invite Not Sent
2	4	2	1	1

Pathway: Database > Send Bulk Account Portal Invites