

Customer Portal - Added Default Option For Service Record Photos (15176)

Last Modified on 05/10/2023 9:04 am EDT

A update has been made to Account Class Setup to include an option to automatically display service photos on the Customer Portal. The default setting for this option is 'Yes'.

The screenshot shows the 'ADD ACCOUNT CLASS' form with the 'Portal / Payment Processing' tab selected. The form is divided into two main sections: 'Account Portal' and 'Credit Card/ACH'. The 'ENABLE SERVICE PHOTO DISPLAY' dropdown menu is highlighted with a red box, showing 'Yes' and 'No' options. The 'ENABLE SERVICE PHOTO DISPLAY' dropdown is currently set to 'No'. The 'ENABLE ACCOUNT PORTAL PAY PROCESSING FEE' checkbox is checked. The 'ENABLE MANUAL PAY PROCESSING FEE', 'ENABLE AUTO PAY PROCESSING FEE', and 'ENABLE ORDER PAY PROCESSING FEE' checkboxes are unchecked. The 'CREDIT CARD PROCESSING FEE TYPE' dropdown is set to 'None'. The 'CREDIT CARD FEE AMOUNT', 'CREDIT CARD PROCESSING FEE CHARGE CODE', 'ACH PROCESSING FEE TYPE', 'ACH FEE AMOUNT', 'ACH PROCESSING FEE CHARGE CODE', 'AUTO PAY DECLINED FEE CHARGE CODE', 'AUTO PAY DECLINED FEE AMOUNT', and 'BILLING AUTO PAY AMOUNT' fields are empty or have a default value of 'None'.

Field Name	Value
ENABLE PORTAL ACCESS	Yes
ACCOUNT PORTAL HOME PAGE	
ENABLE ADD SITES	No
NEW LOCATION TEMPLATE	
NEW LOCATION BUNDLE	
ENABLE ON CALL ORDERS	No
ENABLE REPORT ACCESS	
ENABLE SERVICE PHOTO DISPLAY	No
ENABLE ACCOUNT PORTAL PAY PROCESSING FEE	<input checked="" type="checkbox"/>
ENABLE MANUAL PAY PROCESSING FEE	<input type="checkbox"/>
ENABLE AUTO PAY PROCESSING FEE	<input type="checkbox"/>
ENABLE ORDER PAY PROCESSING FEE	<input type="checkbox"/>
CREDIT CARD PROCESSING FEE TYPE	None
CREDIT CARD FEE AMOUNT	
CREDIT CARD PROCESSING FEE CHARGE CODE	
ACH PROCESSING FEE TYPE	None
ACH FEE AMOUNT	
ACH PROCESSING FEE CHARGE CODE	
AUTO PAY DECLINED FEE CHARGE CODE	
AUTO PAY DECLINED FEE AMOUNT	
BILLING AUTO PAY AMOUNT	

Pathway: Setup > Account > Account Class; Customer Portal