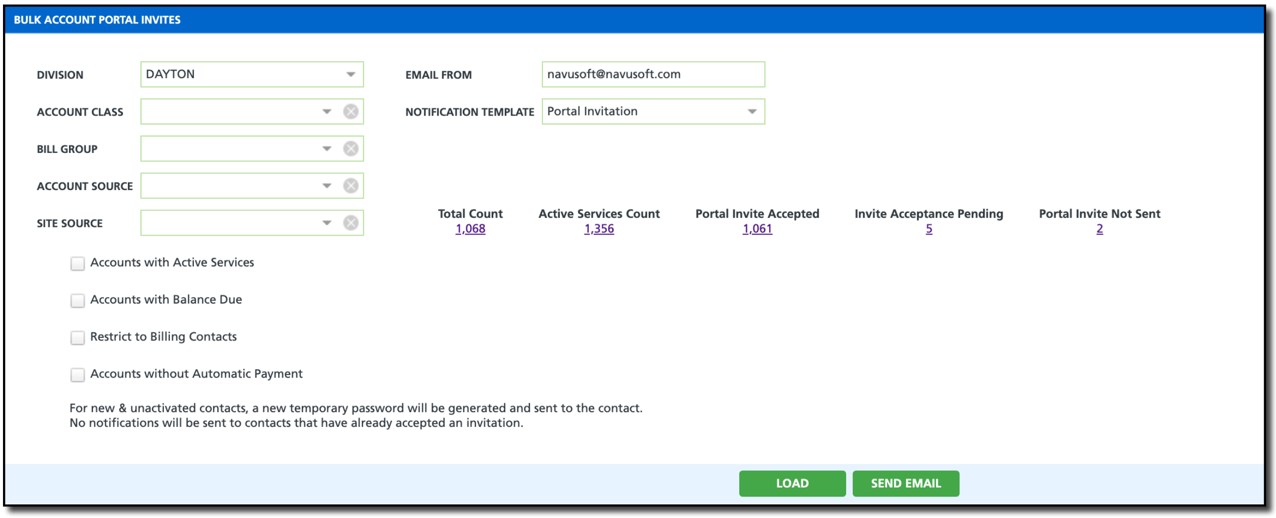
Send Bulk Portal Invites

Last Modified on 02/03/2025 2:41 pm PST

Pathway: *Database > Send Bulk Portal Invites*

The Send Bulk Portal Invites tool facilitates the mass distribution of portal invites to two groups: new users without a portal account and existing users who haven't accepted a previous invite. Multiple filter options are provided to limit the invite recipients.



Permissions

The following permission is required to use the Bulk Customer Portal Invite screen:

Permission ID	Permission Name
390	Send Account Portal Invitations

Field Descriptions

Field	Description
Division	Limits recipients to only those of the selected division.
Account Class	Limits recipients to only those of the selected account class.
Bill Group	Limits recipients to only those of the selected bill group.
Account Source	Limits recipients to only those of the selected account source.
Site Source	Limits recipients to only those of the selected site source.
Email From	Field to enter the email address of the sender, or a no-reply email address.
Notification Template	The template used to send portal invites. Templates are created and maintained in *Setup > System > Notification Template.*
Accounts With Active Service	If selected, an email will only be sent to recipients linked to accounts with at least one active service.

Accounts With Balance Due	If selected, an email will only be sent to recipients linked to accounts with an outstanding balance.
Restrict To Billing Contacts	Limits the portal invite to only be sent to the billing contacts of an account.
Accounts Without Automatic Payment	If selected, limits the portal invite to only be sent to recipients of accounts that do not have automatic payment.

Send Bulk Portal Invites

1. Select the **Division** the bulk portal invite email is intended for.
    - Further narrow down who should receive the portal invite by selecting an option from the Account Class, Bill Group, Account Source and Site Source drop down fields.
2. Check any of the box options that apply to filter the group by further.
3. Click **Load** to preview invite counts. Load must be selected anytime a filter is added or changed.
    - After load is complete, select one of the invite counts displayed to review the list of recipients it includes.
4. Click **Send Email** when finished.