Send Bulk Customer Portal Invites

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Pathway: *Database > Send Bulk Customer Portal Invites*

The **Bulk Customer 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
Account Division	Limits recipients to those within the selected account division. After selecting a division, portal invitation detail counts are displayed as hyperlinks that can be clicked to review the details.
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.
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.
Email From	Field to enter the email address of the sender, or a no-reply email address. • Defaults to the email address assigned to the division *(Setup > System > Division)*. • Allows for manual entry of an email address.
Notification Template	The template used to send portal invites. Templates are created and maintained in *Setup > System > Notification Template.*

Send Bulk Portal Invites

Use the process outlined below to bulk send customer portal invites.

1. Select the **Account Division** the bulk portal invite email is intended for.
   - Further narrow down who should receive the portal invite by selecting options from the **Account Class**, **Bill Group**, **Account Source** and **Site Source** drop down fields.
2. Additional checkbox options are available to further refine which recipients within the selected account and site filters will receive the portal invitation. These options allow the invitation to be targeted based on criteria such as accounts with active services or limiting delivery to only the billing contacts.
3. Select the **Notification Template** you want to use to send the portal invitations. The **Email From** field will automatically populate with the division's email address, this can be deleted and manually entered.
   - By default the **Limit to contacts without an existing invitation** is checked. Uncheck this box to resend the invite to contacts who have previously received a portal invite and have not yet accepted it.
4. Click **Send Email** when finished.

Count Groups

After selecting an account division, the count totals for that division are displayed as hyperlinks. Clicking a count will open the **Portal Invitation Details** screen filtered to that specific count.

Related Articles

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