

Portal - Enhancement to Allow Customers to View Service History for Inactive Sites (15557) [Enhancement]

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The Account Portal has been updated to grant users of an inactive site access to view service history information, associated photos, manifests, and report attachments. Other options, such as the ability to create a request or view AR information, are not available.

Access to inactive sites is determined by the account class to which the site belongs. When the 'Enable Viewing Inactive Site' field in the Account Portal tab is set to "Service History Only," portal users will have restricted access upon logging in.

The screenshot displays the Account Portal interface. At the top, there are two dropdown menus for 'SELECT ACCOUNT' (showing '20306 JONES TERESA') and 'SELECT SERVICE LOCATION' (showing '20306001 JONES TERESA 123 COUNTY ROAD 4022, DAYTON TX'). Below these is a 'TEST MESSAGE TESTING' section with a 'Reports / Documents' button. A 'RECENT SERVICES' table is visible, listing several '2 Yard Trash Service' entries with their respective IDs and completion dates. An 'UPDATE ACCOUNT CLASS' modal is open, showing the 'Account Portal' tab. The 'ENABLE VIEWING INACTIVE SITE' field is highlighted with a red box and set to 'Service History Only'.

RECENT SERVICES	ID	SERVICE
Fri Jun 30, 2023	6603176 (Service Completed)	2 Yard Trash Service
Thu Jun 29, 20...	6151556 (Service Completed)	2 Yard Trash Service
Thu Dec 29, 2...	5080211 (Service Completed)	2 Yard Trash Service
Thu Dec 22, 2...	5043533 (Service Completed)	2 Yard Trash Service
Thu Dec 15, 2...	5006990 (Service Completed)	2 Yard Trash Service

Details	Account Portal	Payment Processing
ENABLE PORTAL ACCESS	Yes	
ACCOUNT PORTAL HOME PAGE	Service Map and Ret	
ENABLE ADD SITES	No	
NEW LOCATION TEMPLATE		
NEW LOCATION BUNDLE		
ENABLE ON CALL ORDERS	No	
ENABLE REPORT ACCESS	Yes	
ENABLE SERVICE PHOTO DISPLAY	Yes	
ENABLE VIEWING INACTIVE SITE	Service History Only	

Pathway: [Portal](#); [Setup](#) > [Account](#) > [Account Class](#)

Articles: [Account Class Setup](#)