Customer Portal Views

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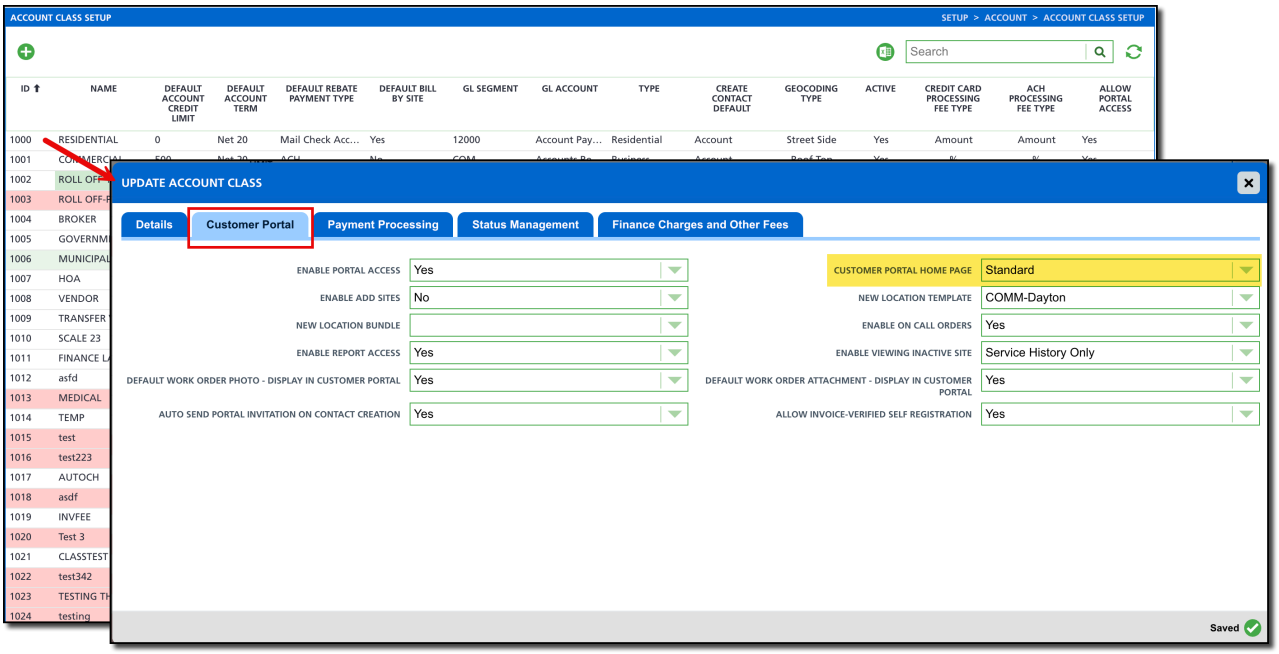
Pathway: *Setup > Account > Account Class; Customer Portal*

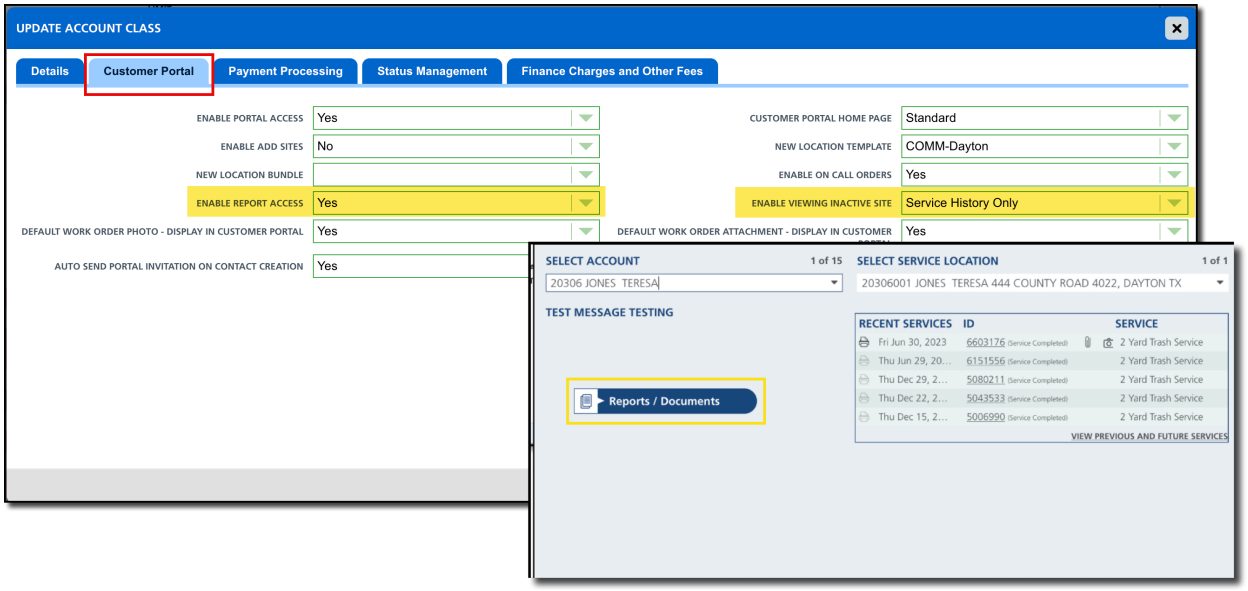
Customer Portal View Setup

The view presented to customers upon logging into their portal account is the Customer Portal Home Page and is configured at the **Account Class level.** System users with **permission 23** can define this view within the *Customer Portal* tab of the Account Class setup. This article provides examples of each view and what can be expected when a site is inactive.



Grant Customers Access to View Inactive Sites

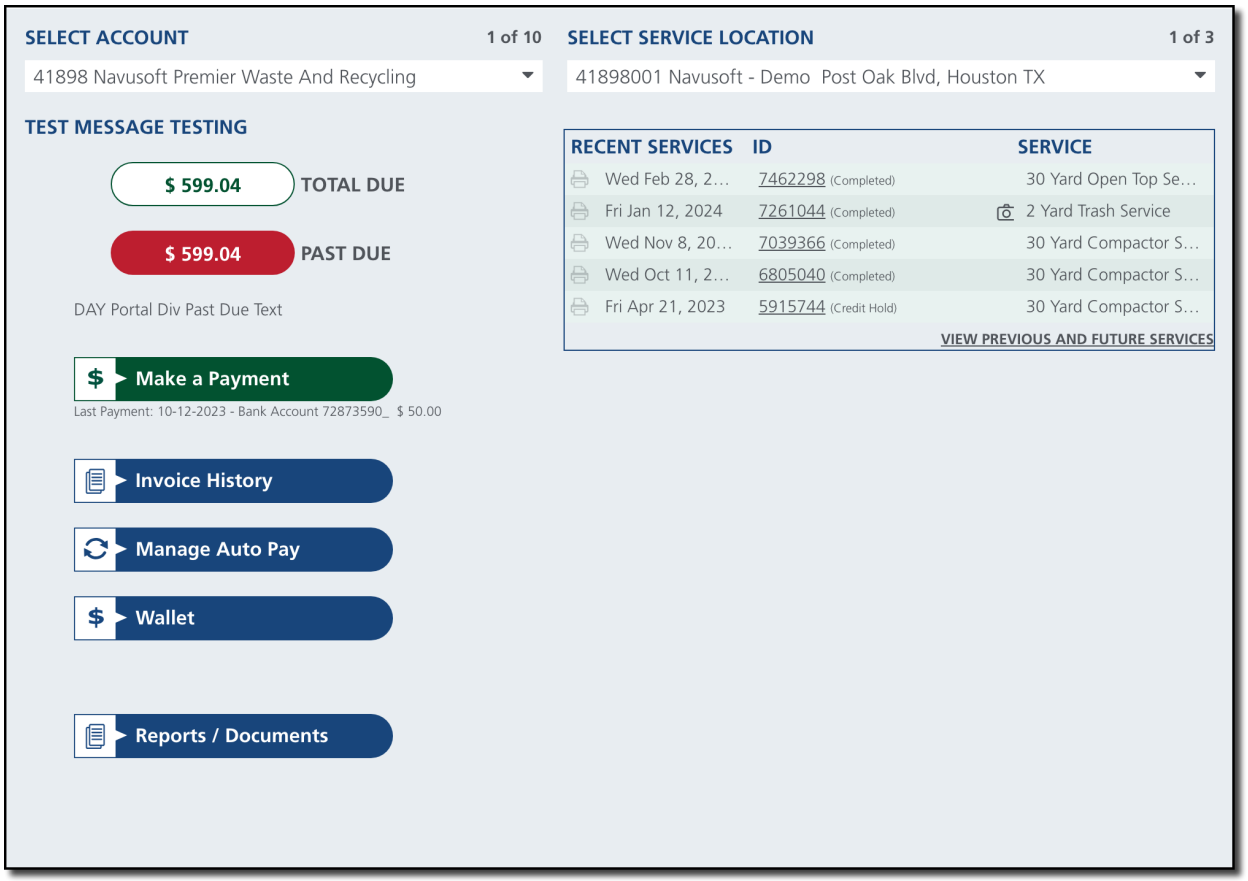
When a site is marked as 'Inactive,' customers may be granted restricted access to view the site's service history if "Service History Only" is selected for the **Enable Viewing Inactive Site** setting for the account class. Additionally, if the **Enable Report Access** option is set to "Yes," customers will also have access to their reports and documents.



To learn more about the configuration fields on the Customer Portal tab, see the Account Class Setup document.

Customer Portal Homepages

The account class provides the option to select the homepage that best fits your needs. Expand each section below to view examples. The one shown here is the Standard view.



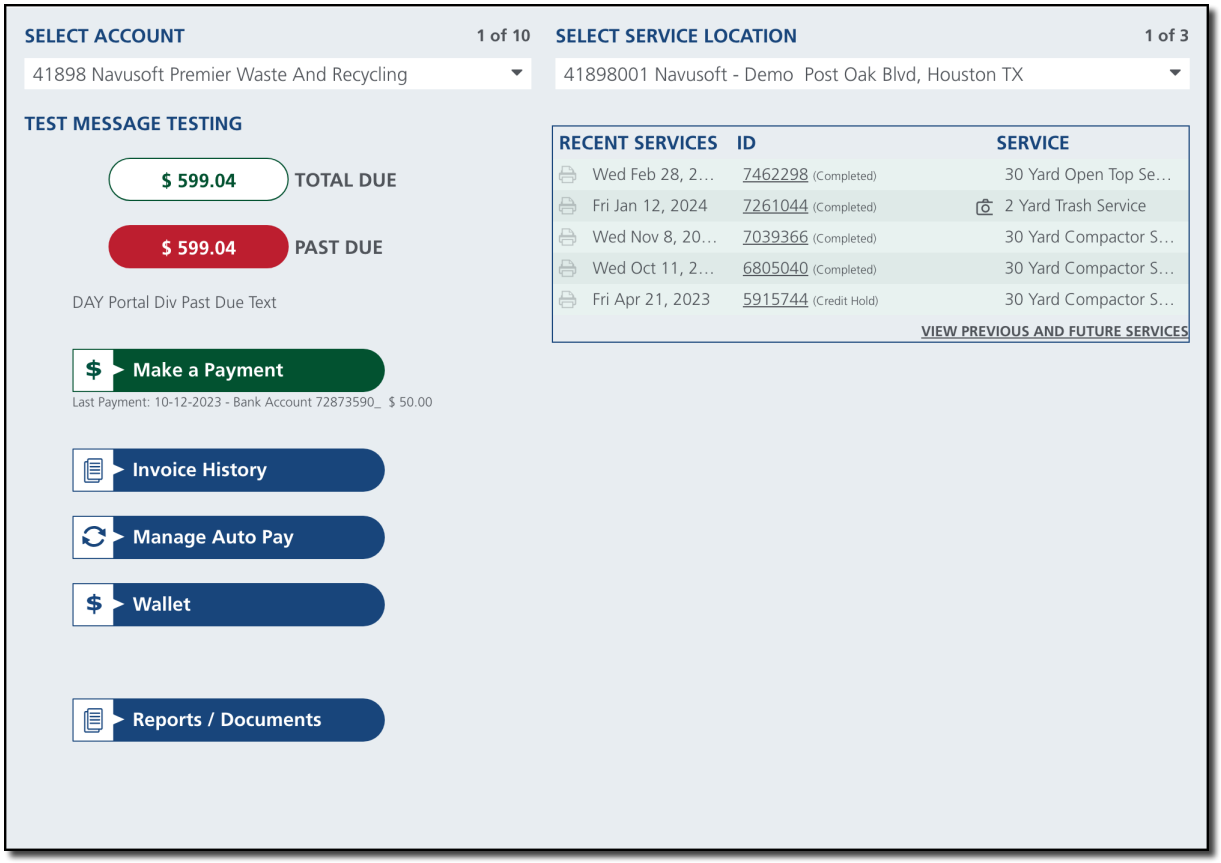
Portal Homepage Overview

The following descriptions apply to common fields and action buttons that are displayed across many of the views.

Field/Button	Description
Select Account	Drop down to select the account sites are linked to.
Select Service Location	Drop down to select and view the details of a specific site.
Total Due	The total amount that is due for the selected site.
Past Due	The total amount that is past due for the selected site.
Make a Payment	Option to make a payment using a credit card or bank account.
Invoice History	Opens the Invoice and Payment History screen for customers to review and print their invoices.
Manage Auto Pay	Provides customers the ability to manage their auto pay. This includes the ability to turn off automatic payments, or change the payment method.
Payment Methods	Provides customers the ability to add and save payment methods to the system. This is separate from auto pay and if the payment method should be used for automatic payments, once added it will be available as a payment method selection option in the Manage Auto Pay screen.
Requests	Option for customers to submit a request that will populate in *Account > Account Request Management*. Requests created in the portal are assigned to the account manager assigned to the account.
View All Requests	Displays a history of all requests created in the portal.
Current Services	Displays a list of active services the customer is currently receiving.
Recent Services	Displays a list of recent services. The option to display work order photos and attachments is also available but must be enabled in Setup > Account > Account Class > Customer Portal.

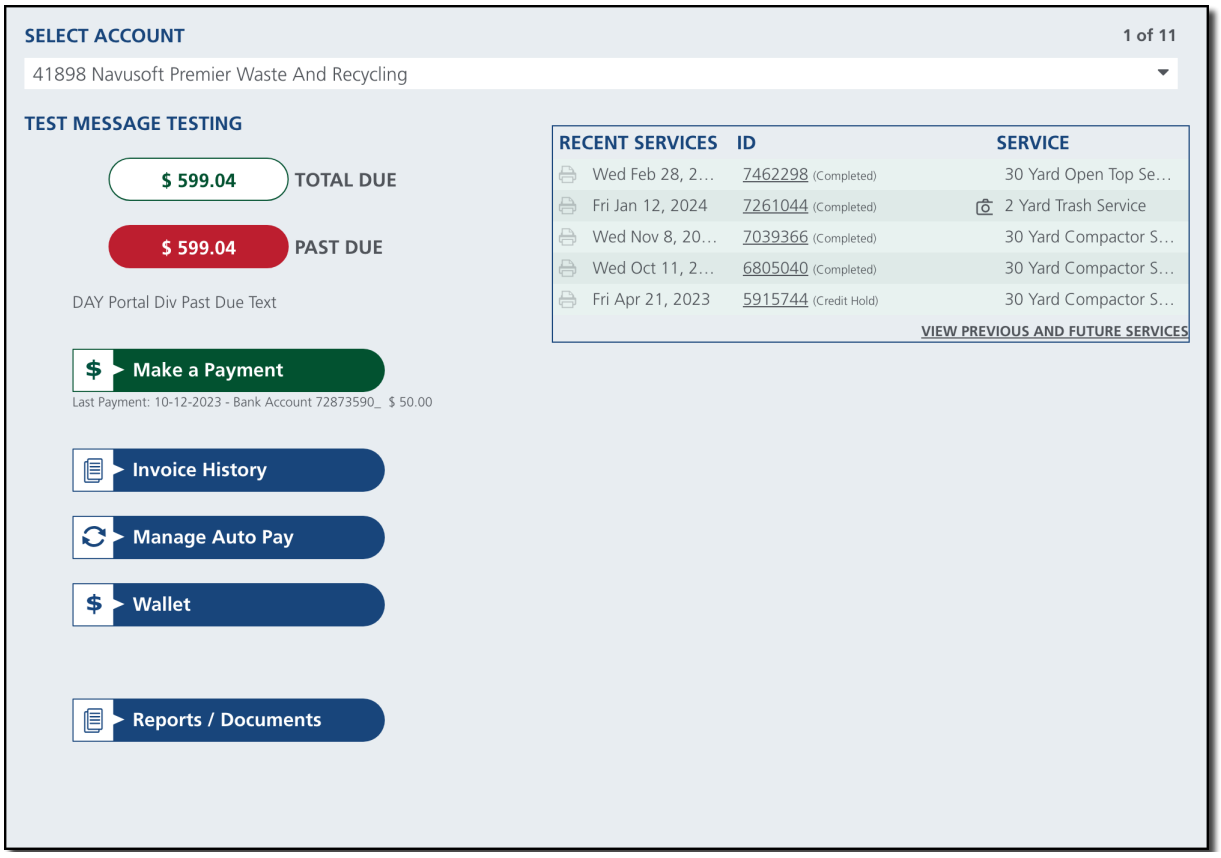
Standard - Homepage

The Standard homepage offers essential account management features and service details. From this interface, customers can perform various actions, such as making payments, accessing invoice history, managing automatic payment arrangements, reviewing recent and ongoing services, and submitting online accounts requests.



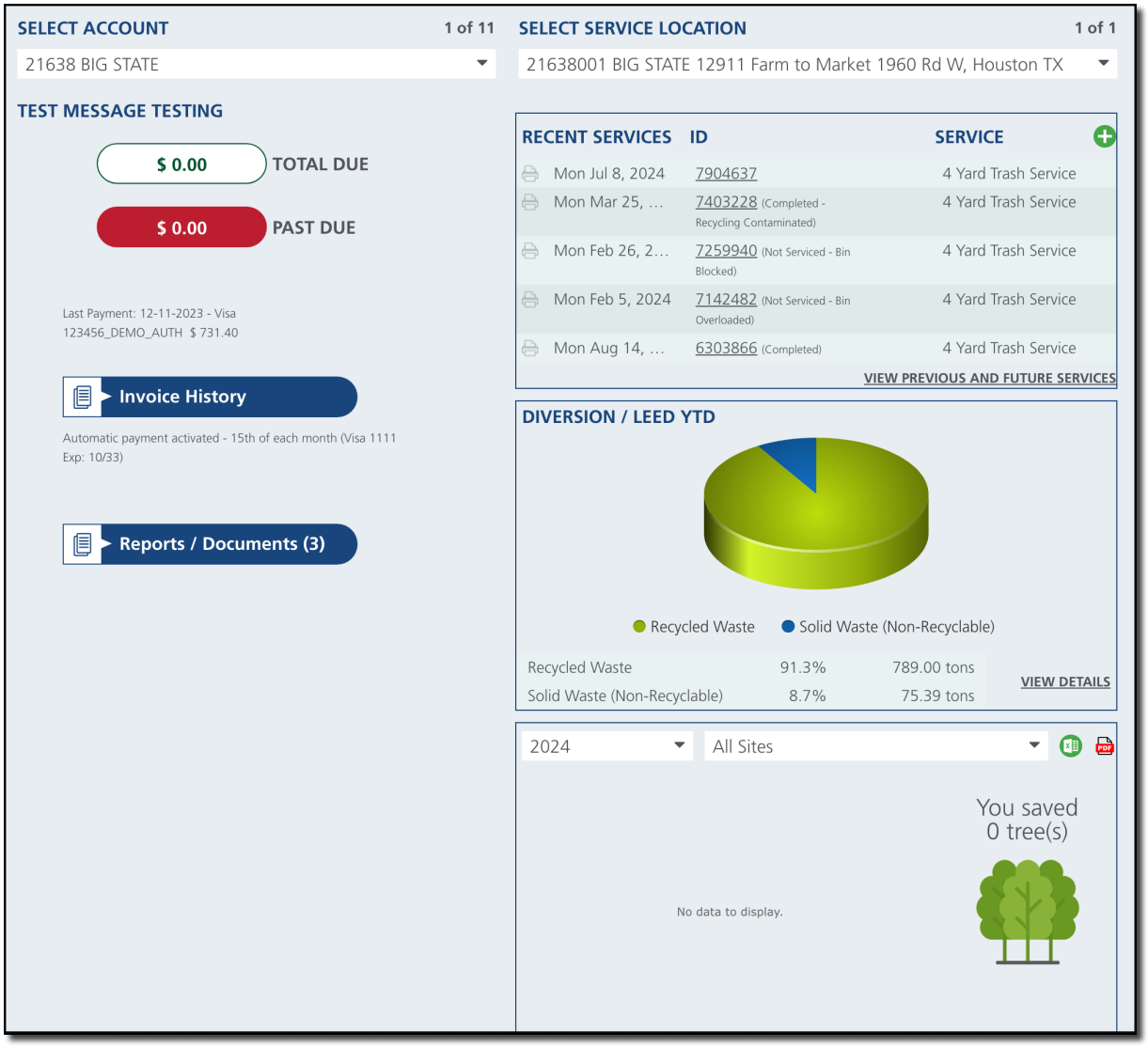
AR Only - Homepage

The AR Only homepage exclusively shows items related to the customer's accounts receivable. This includes viewing invoices and balances, making payments, and managing payment methods and auto-pay.



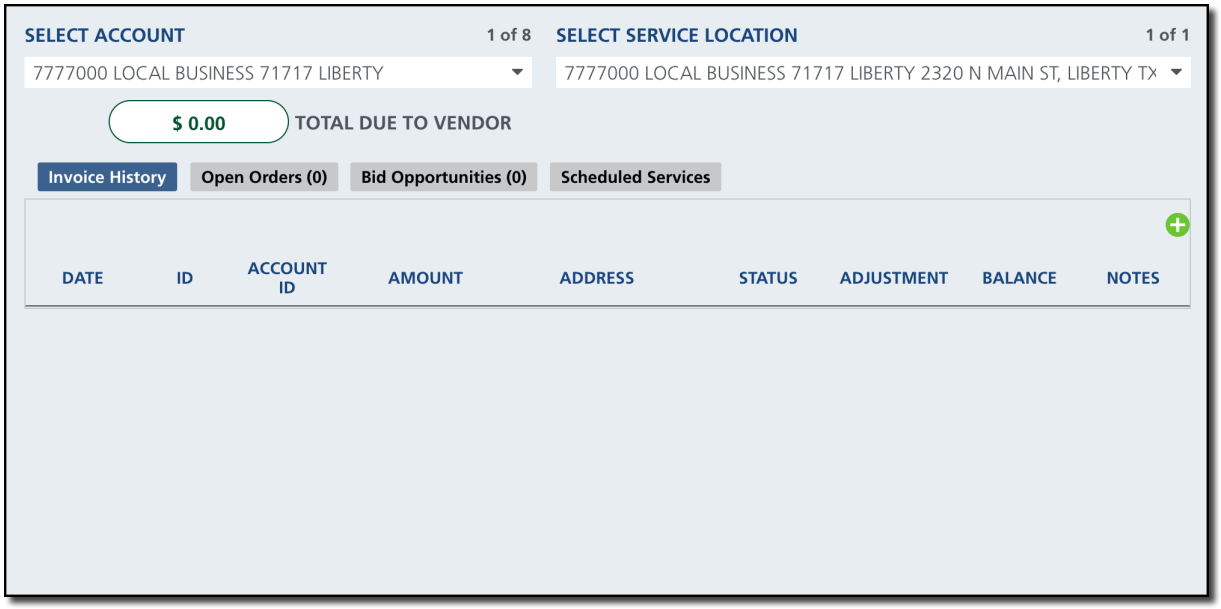
Mail Back - Homepage

The Mail Back homepage features a pie graph displaying recycling rates for all sites or the current site being viewed. Additionally, customers have access to the Recycling Composition Report from this portal view by selecting the PDF icon associated with the graph.



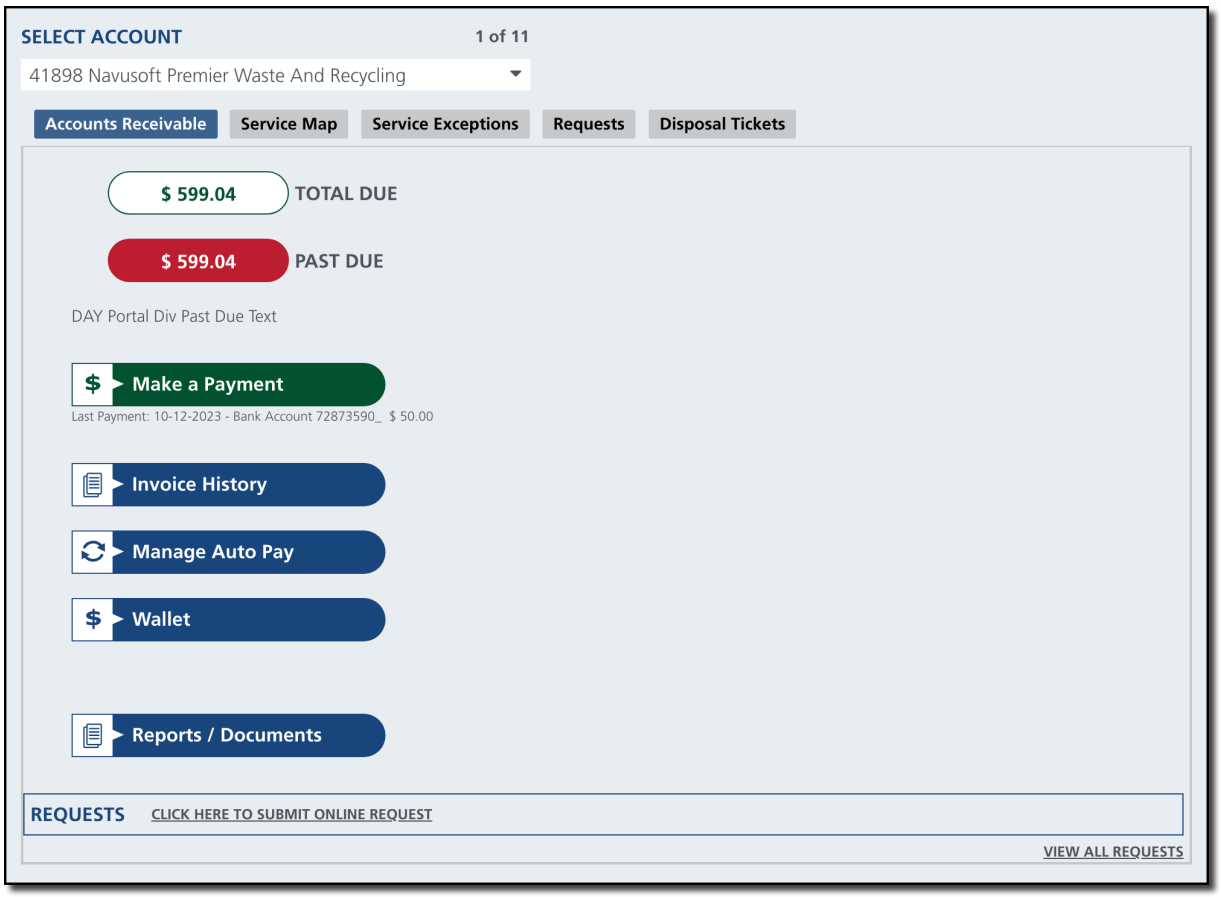
Vendor - Homepage

The Vendor homepage applies to vendor accounts. This view **excludes** AR information (except for the option to view invoice history), but does include additional features such as viewing Open Orders and Scheduled Services.



Service Map And Request - Home Page

The Service Map and Request homepage features an AR section for the account and includes additional features to view the service map, requests, and disposal tickets.



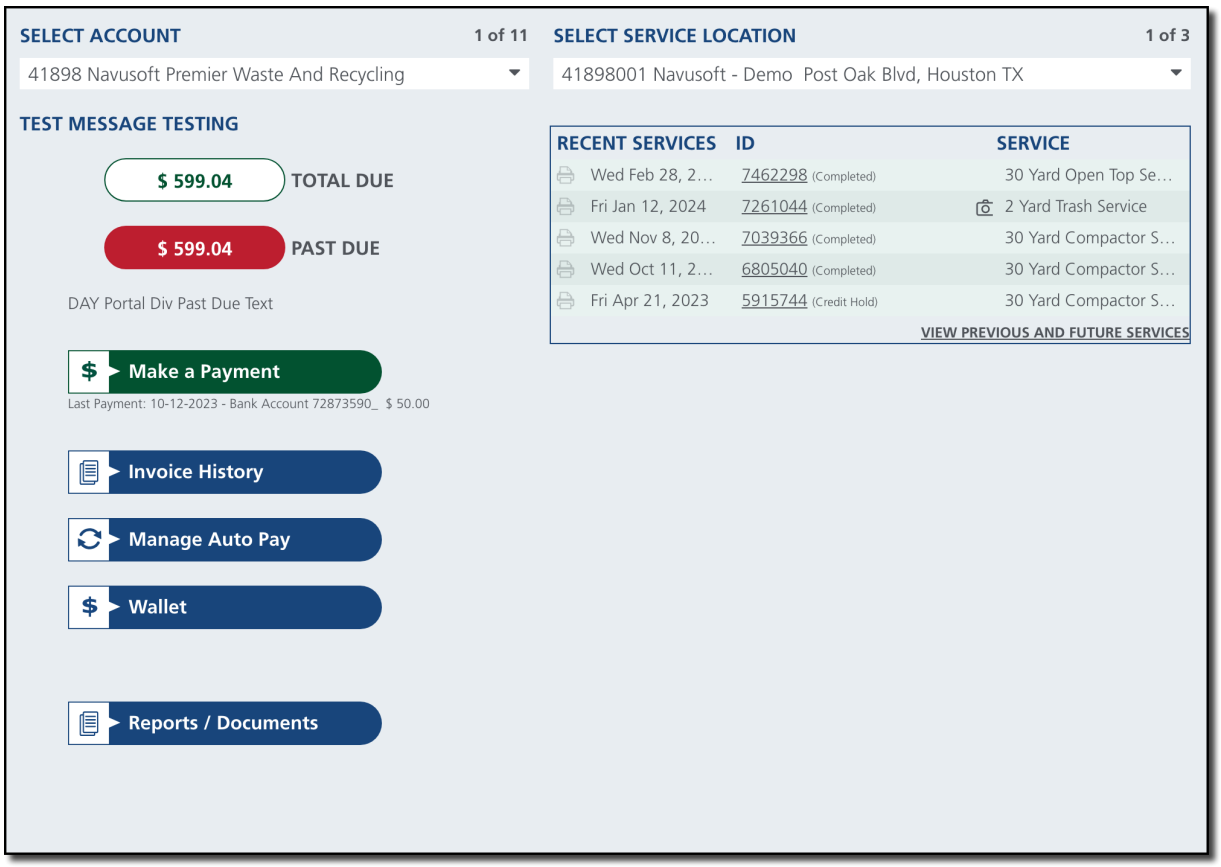
Descriptions

Action Button	Description

Accounts Receivable	Default display showing the action buttons associated with accounts receivable.
Service Map	Displays the service map of the service locations that belong to the account.
Requests	The customer service screen displays a history of requests submitted from the portal, as well as account requests created in Navusoft.
Disposal Tickets	Provides a history of disposal ticket records that can be searched using a date range.

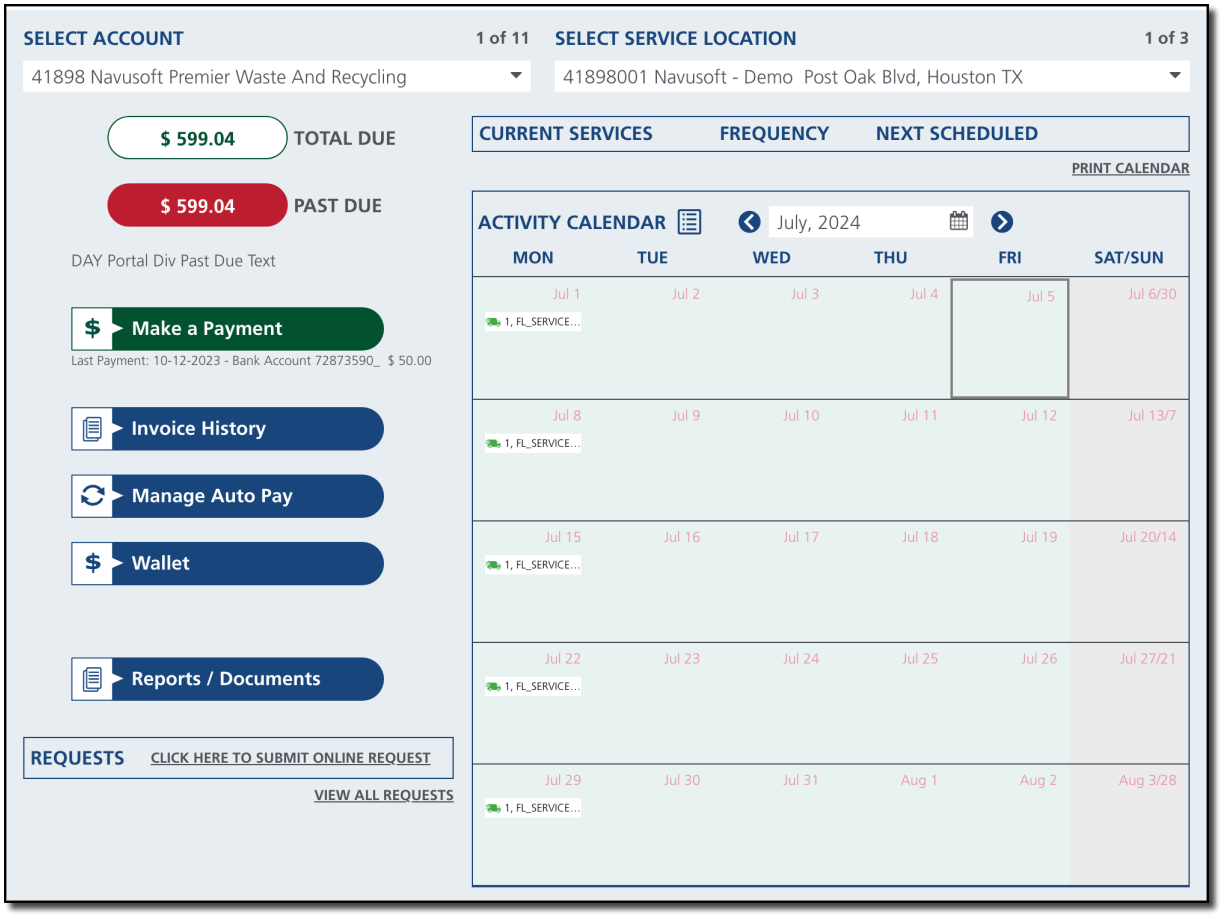
MRF/Recycling - Home Page

The MRF/Recyclying homepage currently displays the AR section, Current Services and Recent Services sections.



Calendar View - Home Page

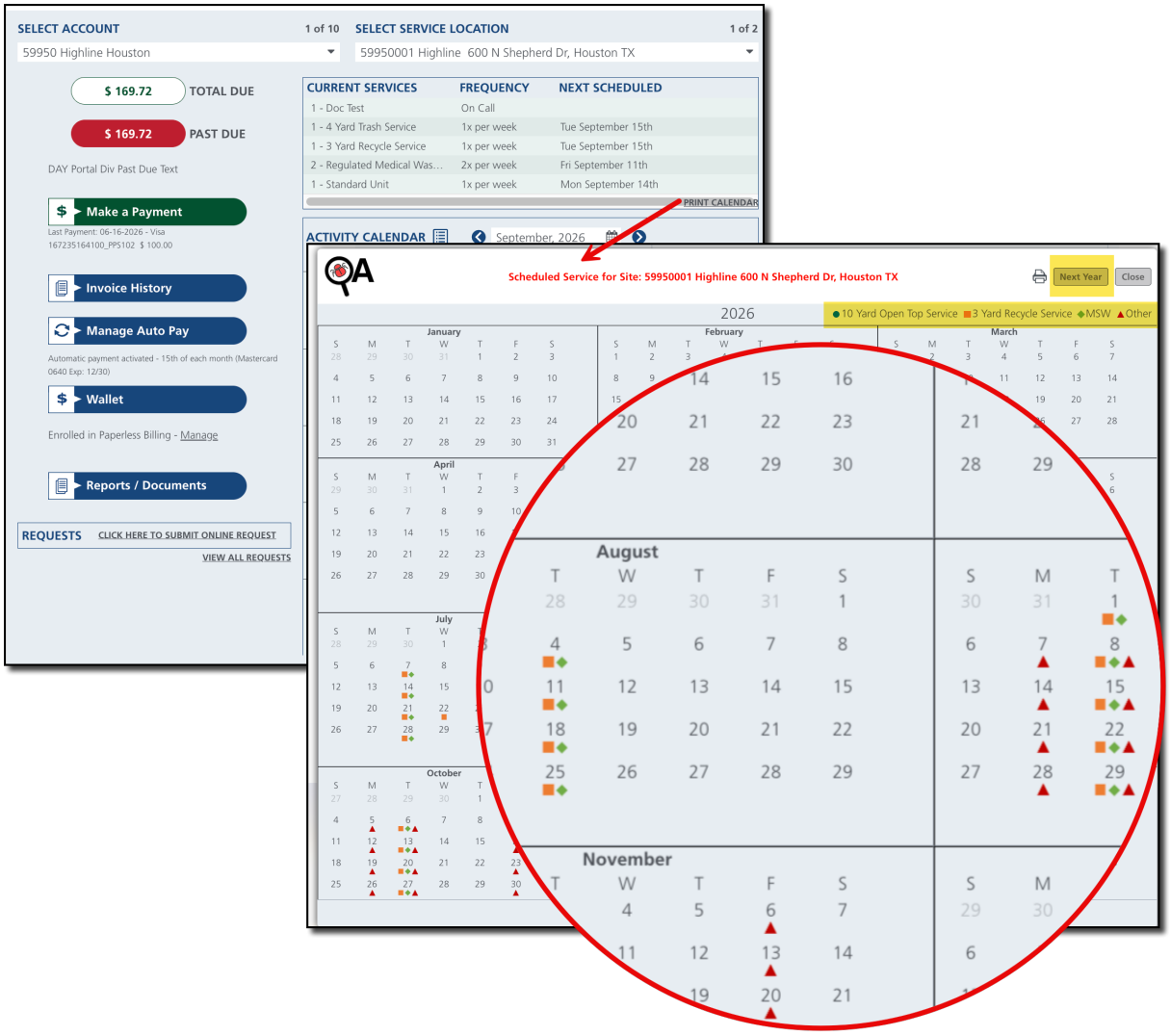
The Calendar View homepage includes the addition of an Activity Calendar. Items displayed in the calendar, such as services and requests, are live links that allow customers to select and review its details further.



Print Calendar

From the Calendar View, the ability to print the calendar is provided by selecting **Print Calendar.**

The printed view groups service codes by material type and uses visual markers to identify the services scheduled each day.

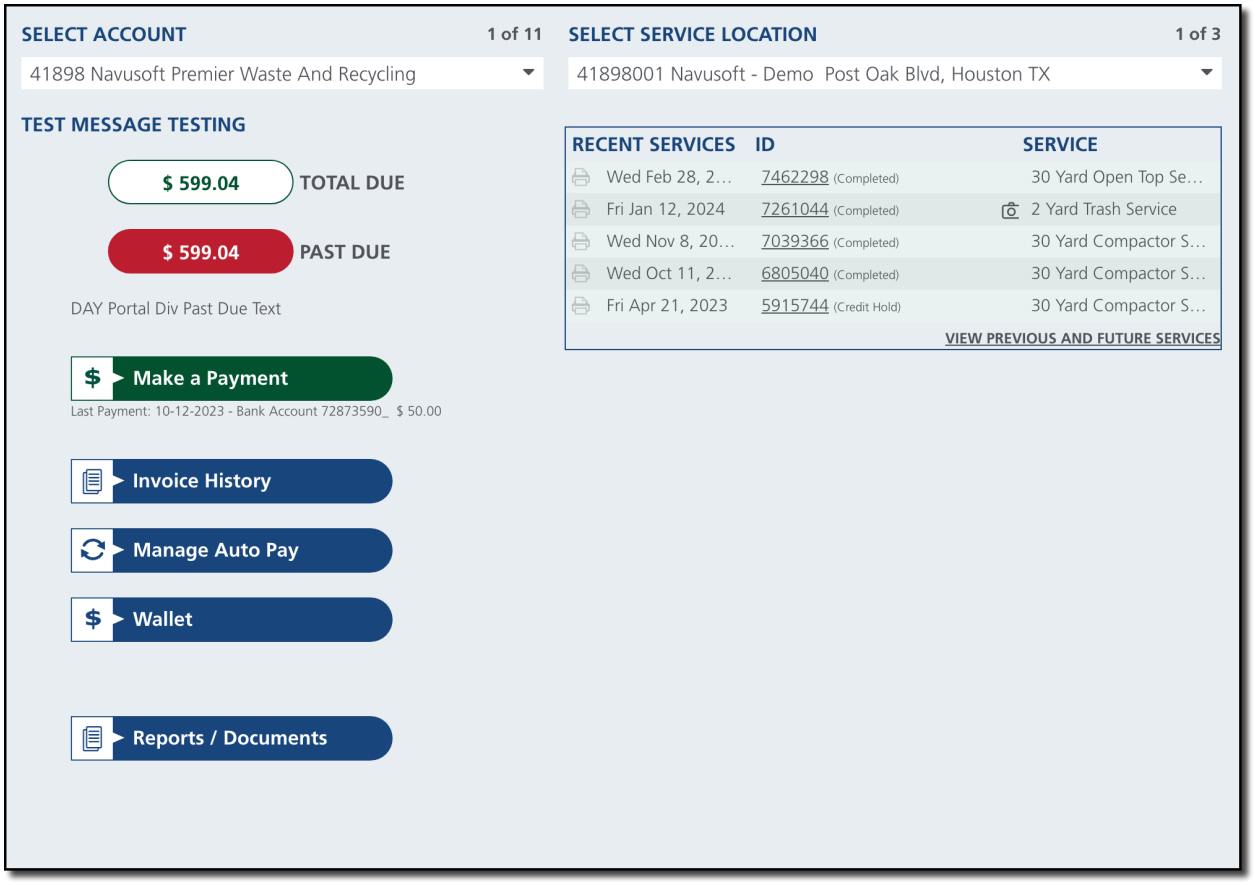


Material types are sorted in ascending order to determine their marker assignment. If a service does not have a material type, then its service code is used instead. When more than four types are scheduled, the remaining are grouped with the 4th one under **Other**.

- Up to **four markers** represent different material types:
  - blue circle
  - orange square
  - green diamond
  - red triangle
- A legend is provided for marker identification.
- Allows users to view and print the current or next year's calendar
- Material assignments may change from year to year because they are based on the material types scheduled for that specific year.

Brokered Account - Home Page

The Brokered Account View homepage provides many of the same items as the other views, but it also includes a Diversion / LEED YTD section with a pie graph.



Permissions

The following permission must be enabled for a system user to change the **Customer Portal Home Page** in the Account Class Setup.

Permission ID	Permission Name
23	Setup / Account

Related Articles

Customer Portal Setup
Manage Autopay
Manage Payment Methods (Wallet)