## **Customer Portal Views**

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Pathway: Setup > Account > Account Class; Customer Portal

### **Customer Portal Home Page**

The view presented to customers upon logging into their portal account is determined by the account class. Within the account classes setup, system users (with permission 23) can choose the portal home page view customers associated with a specific account class will see from the Customer Portal tab. This article provides examples of each view and what can be expected when a site is inactive.

ACCOUNT	CLASS SETUP							
Ð								
ID 🕇	NAME	DEFAULT ACCOUNT CREDIT LIMIT	DEFAULT ACCOUN TERM	T DEFAULT REBATE P	AYMENT TYPE DEFAULT BI	L BY SITE GL SEGMENT	GL ACCOUNT	ТҮРЕ
1000	RESIDENTIAL	0	Net 20	Not Applicable		12000	Accounts Receivable	Residential
1001	COMMERCIAL	500	Net 20	ACH		12000	Accounts Receivable	Business
1002	ROLL OFF-TEMP	UPDATE ACCOUNT CLA	ss				?	ess
1003	ROLL OFF-PERM					Y		ess
1004	BROKER	Details Custom	er Portal Pag	yment Processing	Status Management	Finance Charges / Late Fees		ess
1005	GOVERNMENT							ess
1006	MUNICIPAL	ENABLE PORTAL ACCESS		Yes	-			rnment
1007	HOA	CUSTOMER PORTAL HON	IE PAGE	Service Map and R	ec 💌			ential
1008	VENDOR			No				or
1009	TRANSFER WO	ENABLE ADD SITES		NO	*			ess
1010	SCALE	NEW LOCATION TEMPLA	TE		~			ess
1011	FINANCELATEFEE	NEW LOCATION BUNDLE			Ŧ			ess
1012	FINTEST	ENABLE ON CALL ORDER	is.	No	~			ess
1013	MEDICAL							ess
1014	TEMP	ENABLE REPORT ACCESS		Yes	*			ess
		ENABLE VIEWING INACTI	IVE SITE	No	-			
		DEFAULT WORK ORDER F CUSTOMER PORTAL	PHOTO - DISPLAY IN	Yes	•			
		DEFAULT WORK ORDER A DISPLAY IN CUSTOMER P	ATTACHMENT - PORTAL	No	v			

#### 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

#### **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.

UPDATE ACC	OUNT CLASS							<b>() ()</b>	1
Details	Customer Po	ortal Pay	ment Processing	Status Management	Finance C	Charges / Late Fees			
ENABLE POR	TAL ACCESS		Yes	*					
CUSTOMER F	PORTAL HOME PA	GE	Standard	~					
ENABLE ADD	SITES		No	~					
NEW LOCATI	ION TEMPLATE			-					
NEW LOCATI	ION BUNDI F			~					
			Ver	-					
ENABLE ON	CALL ORDERS		Vee						
ENABLE REPO	ORT ACCESS		res	· ·					
ENABLE VIEW	WING INACTIVE SI	TE	Service History On	ily –					
DEFAULT WO	ORK ORDER PHOT	0 - DISPLAY IN	No	v					
DEFAULT WO	ORK ORDER ATTA	SELECT AG	SELECT ACCOUNT		1 of 15	5 SELECT SERVICE LOCATION			1 of
DISPLAY IN C	CUSTOMER PORT	20306 JONES TERESA			•	20306001 JONES	DAYTON TX		
		TECT MEC							
TEST MESSA		SAGE TESTING			RECENT SERVICES	ID	SE	RVICE	
						🖨 🛛 Fri Jun 30, 2023	6603176 (Service Completed)	0 <u>ĉ</u> 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
			Reports / Doc	uments		👌 Thu Dec 22, 2	5043533 (Service Completed)	2	Yard Trash Service
						👌 Thu Dec 15, 2	5006990 (Service Completed)	2	Vard Trash Sonvico
									Tatu Trasti Service

# **Customer Portal Homepages**

The account class provides the following homepages. Expand each section to view examples.



### **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	Drop down to select and view the details of a specific site.					
Location	· · · · · · · · · · · · · · · · · · ·					
Total Due	Displays the total amount that is due for the selected site.					
Past Due	Displays 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					
invoice riistory	their invoices.					
Manage Auto Pay	Provides customers the ability to manage their auto pay. This includes the ability to					
Mailage Auto Pay	turn off automatic payments, or change the payment method.					
	Provides customers the ability to add and save payment methods to the system. This					
Payment Methods	is separate from auto pay and if the payment method should be used for automatic					
r ayment Methous	payments, once added it will be available as a payment method selection option in					
	the Manage Auto Pay screen.					
	Option for customers to submit a request that will populate in Account > Account					
Requests	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.					
<b>Current Services</b>	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.

SELECT ACCOUNT	1 of 10	SELECT SERVICE LOCATION	1 of 3
41898 Navusoft Premier Waste And Recycling	•	41898001 Navusoft - Demo Post Oak Blvd, Housto	on TX 🔹
TEST MESSAGE TESTING		RECENT SERVICES ID	SERVICE
\$ 599.04 TOTAL DUE		- Wed Feb 28, 2 <u>7462298</u> (Completed)	30 Yard Open Top Se
		Fri Jan 12, 2024 <u>7261044</u> (Completed)	<u>6</u> 2 Yard Trash Service
\$ 599.04 PAST DUE		Hed Nov 8, 20 7039366 (Completed)	30 Yard Compactor S
		Wed Oct 11, 2 <u>6805040</u> (Completed)	30 Yard Compactor S
DAY Portal Div Past Due Text		Fri Apr 21, 2023 <u>5915744</u> (Credit Hold)	30 Yard Compactor S
		VIEW PRI	VIOUS AND FUTURE SERVICES
<ul> <li>Wake a Payment</li> <li>Last Payment: 10-12-2023 - Bank Account 72873590_ \$ 50.00</li> <li>Invoice History</li> <li>Manage Auto Pay</li> <li>Manage Auto Pay</li> <li>Wallet</li> <li>Reports / Documents</li> </ul>			

### **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.

SELECT ACCOUNT			1 of 11
41898 Navusoft Premier Waste And Recycling			•
TEST MESSAGE TESTING	RECENT SERVICES	ID	SERVICE
	A Wed Feb 28, 2	7462298 (Completed)	30 Yard Open Top Se
3 333.04 TOTAL DOL	🔒 Fri Jan 12, 2024	7261044 (Completed)	ر 2 Yard Trash Service
	🔒 Wed Nov 8, 20	7039366 (Completed)	30 Yard Compactor S
\$ 595.04 PAST DOE	🔒 Wed Oct 11, 2	6805040 (Completed)	30 Yard Compactor S
DAY Portal Div Past Due Text	🔒 🛛 Fri Apr 21, 2023	5915744 (Credit Hold)	30 Yard Compactor S
			VIEW PREVIOUS AND FUTURE SERVICES
Last Payment: 10-12-2023 - Bank Account 72873590_ \$ 50.00			
Reports / Documents			

### 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.

SELECT ACC	DUNT		1 of 8	SELECT SERVICE L	OCATION			1 of 1
7777000 LO	CAL BUSIN	IESS 71717 LIB	ERTY -	7777000 LOCAL B	USINESS 717	717 LIBERTY 2320	n main st, li	BERTY TX 🔻
	\$ 0.00	тота	L DUE TO VENDOR					
Invoice His	tory Op	en Orders (0)	Bid Opportunities (0)	Scheduled Services				
								0
DATE	ID	ACCOUNT ID	AMOUNT	ADDRESS	STATUS	ADJUSTMENT	BALANCE	NOTES

### 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.

SELECT ACCOUNT	1 of 11			
41898 Navusoft Premier Waste And Re	ecycling 🔹			
Accounts Receivable Service Map	Service Exceptions	Requests	Disposal Tickets	
\$ 599.04 TOTA	L DUE			
\$ 599.04 PAST	DUE			
DAY Portal Div Past Due Text				
Make a Payment Last Payment: 10-12-2023 - Bank Account 7287	73590_ \$ 50.00			
Invoice History				
C Manage Auto Pay				
\$ > Wallet				
■ Reports / Documents				
REQUESTS CLICK HERE TO SUBMIT ONL	INE REQUEST			
				VIEW ALL REQUESTS

#### 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.
<b>Disposal Tickets</b>	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.



### **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.



### **Related Articles**

Customer Portal Setup Manage Autopay Manage Payment Methods (Wallet)