

Customer Portal (User Security) - Disabling/Restricting Access to Customer Portal For Inactive Contacts (16861)

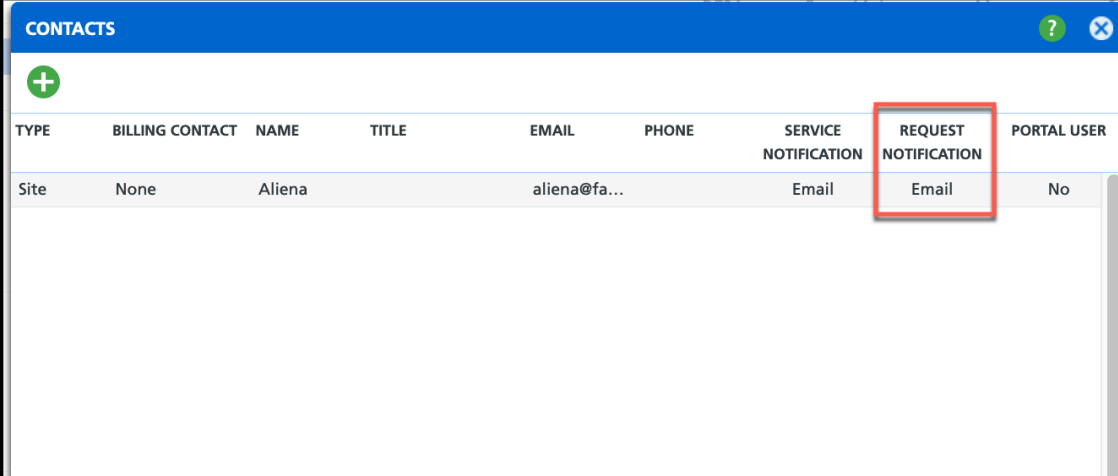
Last Modified on 06/26/2024 12:38 pm EDT

Multiple enhancements have been applied to the Contacts screen, Edit Contact and Edit Portal User screens, and Customer Portal access.

Contacts Screen

The following enhancement has been made to the Contacts screen:

- A Request Notification column has been added to display the contact's preferred notification method.



| TYPE | BILLING CONTACT | NAME | TITLE | EMAIL | PHONE | SERVICE NOTIFICATION | REQUEST NOTIFICATION | PORTAL USER |
|------|-----------------|--------|-------|--------------|-------|----------------------|----------------------|-------------|
| Site | None | Aliena | | aliena@fa... | | Email | Email | No |

Edit Contact Screen

The following change was made to the Edit Contacts screen:

1. 'Enable Portal Access' was added as a checkbox option.
2. In the Edit Portal User popup window, the Active checkbox was renamed to 'Login Enabled.'
3. Not pictured: 'Notify By Email' and 'Notify By Text Message' boxes were removed from the Edit Portal User popup window.

EDIT CONTACT

Details | Customer Portal Access | Tags | History (1)

TITLE

NAME: Aliena

EMAIL: aliena@FakeEmail.com

EMAIL 2

PHONE 1: (999) 999-9999

PHONE 2: (999) 999-9999

PHONE 3: (999) 999-9999

PHONE 4: (999) 999-9999

NOTE

RECEIVE SERVICE NOTIFICATIONS: Yes

SERVICE NOTIFICATION METHOD: Email

REQUEST NOTIFICATION METHOD: Email

MOBILE OPT OUT?

ENABLE PORTAL ACCESS **1**

PORTAL USER: [Portal UserId 16746, Last Login Jun 26, 2024 08:45 am](#)

EDIT PORTAL USER

Details | Login History

ID: 16746 aliena@FakeEmail.com
Created Mar 21, 2023 11:02 am

2 LAST LOGIN: Jun 26, 2024 08:45 am

LOGIN ENABLED

PHONE: (999) 999-9999

MOBILE: (999) 999-9999

SAVE

Customer Portal

Logic for user portal access has been improved. Users will be denied access to accounts and sites unless both 'Enable Portal Access' on the Contacts screen and 'Login Enabled' on the Edit Portal User popup window are checked.

SELECT ACCOUNT | SELECT SERVICE LOCATION

TEST MESSAGE TESTING

Error

You do not have access to any accounts.

