

Customer Portal Setup

Last Modified on 07/21/2025 9:42 am PDT

Explore the key setup areas that influence the performance and usability of the Customer Portal.

SELECT ACCOUNT1 of 16

49232 Caribou Coffee

\$ 3,237.31

TOTAL DUE

\$ 0.00

PAST DUE

\$

Make a Payment

Invoice History

Manage Auto Pay

\$

Wallet

Invoice by Mail - [Enable Paperless Billing](#)

Reports / Documents

SELECT SERVICE LOCATION1 of 1

49232001 Caribou Coffee 112 Chieftain St, Osceola WI

CURRENT SERVICES	FREQUENCY	NEXT SCHEDULED
1 - 4 Yard Trash Service	1x per week	Thu November 21st
1 - 4 Yard Trash Service	1x per week	

PRINT CALENDAR

RECENT SERVICES	ID	SERVICE
Tue Nov 12, 20...	8735052 (Completed)	4 Yard Trash Service
Fri Nov 1, 2024	8676608 (Completed)	4 Yard Trash Service

VIEW PREVIOUS AND FUTURE SERVICES

REQUESTS

[CLICK HERE TO SUBMIT ONLINE REQUEST](#)

VIEW ALL REQUESTS

System Options Setup

Pathway: Setup > System > System Options > Customer Portal (tab)

Configurations made in System Options are universal to all divisions and account classes for the Customer Portal.

SYSTEM OPTIONS SETUP							
System	Sales	Integration	Account	Operations	Customer Portal	Broker	Online Order
CUSTOMER PORTAL URL				LOGIN MESSAGE(HTML)	Testing login message.		
DISPLAY SERVICE HISTORY	Yes			LOGIN TERMS(HTML)	Testing login terms		
DISPLAY AR HISTORY	Yes			MAKE A PAYMENT TERMS			
DISPLAY AGING BUCKETS	Yes			LOGIN LOGO	Select Image... BROWSE...		
DISPLAY LOGIN TERMS	Yes			LOGIN LOGO URL	View		
DISPLAY CURRENT SERVICES	Yes			GRAPHICS STYLE (CSS)	UPLOAD EDIT DOWNLOAD		
DISPLAY SERVICE QUANTITY	Yes			GRAPHICS STYLE URL	View		
ENABLE PAYMENT AS GUEST	Yes						
ENABLE AUTO PAY MAX AMOUNT	Yes						
DISPLAY THIRD PARTY INVOICES	No						
ACCOUNT INVITE FROM EMAIL							
INVITE EMAIL TEMPLATE	Portal Invite (All Divisions)						
ENABLE ACCOUNT REQUEST VIA ADDRESS	Yes						
ACCOUNT REQUEST ADDRESS FOUND TEMPLATE	Portal Invite (All Divisions)						
ENABLE REQUEST LOGIN BUTTON	Yes						

Field	Description and Use
Customer Portal URL	Enter the portal URL that can be provided to customers here.
Display Service History	Displays a 'Recent Services' section on the portal. This setting is also controlled by the Customer Portal Homepage setting that is established in Account Class.
Display AR History	Hides 'Past Due' and 'Total Due' amounts from view in the portal if not enabled.
Display Aging Buckets	When disabled, 'Total Due' and 'Past Due' amounts in the customer portal are not displayed.
Display Login Terms	Select 'Yes' to enable terms to display.
Display Current Services	Displays a 'Current Services' section on the Customer Portal that includes the display of the frequency for the service and the next scheduled servicing date. NOTE: If this setting is disabled (No), but the account class has 'Enable On Call Orders' set to 'Yes,' the Current Services section will still be displayed, as 'Enable On Call Orders' overrides this setting.
Display Service Quantity	Displays the quantity next to each service in the Current Services section of the Customer Portal.
Enable Payment as Guest	When enabled, an 'Invoice Quick Pay' option is available on the login screen. To make a payment, the invoice number and the quick pay code or account number are required.
Enable Auto Pay Max Amount	When enabled, a Maximum Payment Amount field is displayed in the Manage Automatic Payments popup in the Customer Portal. Additionally, an AutoPay Amount field is also displayed in the Account Wallet (<i>Accounts > AR History</i>).

Display Third Party Invoices	Setting that applies to Vendor and Broker homepages. Homepages are set in the Account Class.
Enable Request Login Button	This optional setting allows customers to self-register for a Customer Portal account using information from a recent invoice. Further information and setup can be viewed here: Setting Up Portal Access for Contacts
Login Message (HTML)	Displays a message in the customer portal under the 'Select Account' field after login. This setting does not apply to all customer portal homepages that are set in the account class. Current homepages this doesn't apply to include: <ul style="list-style-type: none"> • Vendor • Service Map and Requests • Calendar View
Login Terms (HTML)	Displays a message at the bottom of the Customer Portal's login screen.
Make a Payment Terms	Displays a message at the bottom of the Make a Payment screen in the Customer Portal.
Login Logo	Option to upload a logo.
Login Logo URL	Option to view the logo that was uploaded.
Graphics Style (CSS)	Please enter a support ticket for assistance with this setting.
Graphics Style URL	Please enter a support ticket for assistance with this setting.

Account Class Setup

Pathway: *Setup > Accounts > Account Class*

Certain customer portal settings can be managed at the account class level, such as the customer's default homepage and the ability to create on-call orders. In some cases, these settings may override those configured in System Options.

ADD ACCOUNT CLASS

Details

Customer Portal

Payment Processing

Status Management

Finance Charges and Other Fees

ENABLE PORTAL ACCESS

Yes

CUSTOMER PORTAL HOME PAGE

ENABLE ADD SITES

No

NEW LOCATION TEMPLATE

NEW LOCATION BUNDLE

ENABLE ON CALL ORDERS

No

ENABLE REPORT ACCESS

ENABLE VIEWING INACTIVE SITE

No

DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL

No

DEFAULT WORK ORDER ATTACHMENT - DISPLAY IN CUSTOMER PORTAL

No

AUTO SEND PORTAL INVITATION ON CONTACT CREATION

No

ALLOW INVOICE-VERIFIED SELF REGISTRATION

No

SAVE

Field	Description and Use
Enable Portal Access	Enables Customer Portal access to users of accounts assigned the account class.
Customer Portal Home Page <i>Required</i>	The Home Page users see upon logging in to their Customer Portal account.
Enable Add Sites	Enables the ability for users to add new service locations from their portal account.
New Location Template	If 'Add Sites' is enabled, select the template the Customer Portal will follow when a new site is added.
New Location Bundle	Default setting for self service ordering. More details to come.
Enable On Call Orders	Enables the option to create On Call Orders from the Customer Portal. When a customer submits an on call order from their portal account, it will display as a Scheduled service in Dispatch as 'No Route Assigned.' Portal users can not submit on call orders for the current day. <ul style="list-style-type: none"> Yes - Enable No - Disable
Enable Report Access <i>Required</i>	Option to control whether Customer Portal users can run reports. This feature requires additional setup in Report Formats to enable specific reports for portal access.

Enabling Viewing Inactive Site	Grants 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 hidden if the site is inactive.
Default Work Order Photo - Display In Customer Portal	Controls if a photo should display in the Customer Portal.
Default Work Order Attachment - Display In Customer Portal	Controls if an attachment should display in the Customer Portal.
Auto Send Portal Invitation on Contact Creation	Optional setting that allows portal invitations to be automatically sent when a new contact is created. To enable this, select 'Yes' for the ' Auto Send Portal Invitation on Contact Creation ' setting in the Account Class Setup screen. Once enabled, a portal invites will be sent to new contacts, provided a valid email address is entered. Further setup and information can be reviewed here: Setting Up Portal Access for Contacts
Allow Invoice-Verified Self Registration	Optional setting to allow customers to self-register for a portal account using a recent invoice that includes an invoice number and either a quick pay code or an account number. Further setup and information can be reviewed here: Setting Up Portal Access for Contacts

Division Setup

Pathway: [Setup](#) > [System](#) > [Division](#)

Configuring the Credit Card / ACH Processing screen within Division Setup is crucial for handling online payment transactions. These settings impact online payments in the customer portal as well as payment processing for billing.

Details

On the **Details** tab of the Division setup screen, you can configure the **Customer Portal URL** and **Customer Portal Past Due Text** fields. Any text entered in the **Customer Portal Past Due Text** field will appear on the portal beneath the past due amount when the account is overdue.

ADD DIVISION

Details

Credit Card / ACH Processing

Inter-company

Addresses

NAME		AUTO PROCESS SERVICE CHANGES	
MAIN PHONE	(999) 999-9999	ENABLE INTEGRATION	
TOLL FREE PHONE	(999) 999-9999	LOCK BOX IMPORT FORMAT	
FAX	(999) 999-9999	LOCK BOX NON-MATCHING DEFAULT ACCOUNT	
EMAIL		CUSTOMER PORTAL URL	
TIME ZONE		CUSTOMER PORTAL PAST DUE TEXT	
SERVICE NOTIFICATION FROM EMAIL		MAILCHIMP API KEY	
DIVISION GROUP		MAILCHIMP LIST ID	
EPA ID		SMS TASK DEFAULT USER	
GL SEGMENT		RO DISPOSAL REV %	0.00

Credit Card / ACH Processing

The Division's **Credit Card / ACH Processing** tab provides the fields that allow for processing payments in the system as well as in the Customer Portal.

ADD DIVISION

Details

Credit Card / ACH Processing

Inter-company

Addresses

ENABLE CREDIT CARD PROCESSING	No
CREDIT CARD GATEWAY	None
GATEWAY ENV	
GATEWAY API KEY / USER NAME	
GATEWAY TRANS. KEY / PASSWORD	
GATEWAY CREDIT CARD MERCHANT ID	
GATEWAY BANK MERCHANT ID	
GATEWAY SETTLEMENT TIME	-- : -- --
CREDIT CARD BANK ACCOUNT	
PAYMENT RECEIPT NOTIFICATION TEMPLATE	
DECLINED PAYMENT NOTIFICATION TEMPLATE	
PAYMENT REFUND NOTIFICATION TEMPLATE	

SAVE

Field	Description and Use
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Enable Credit Card Processing <i>Required</i>	<p>Selections here affect the display of the Wallet and Payment features in the Customer Portal. If 'No' is selected, payment features are not displayed.</p> <p>Options include:</p> <ul style="list-style-type: none"> • Yes (<i>Credit Card & ACH</i>) - Customers can add a credit card or bank routing information to wallet, or make a payment with either option. • Yes (<i>Credit Cards Only</i>) - Customers can only add a credit card to wallet, or make a payment with a credit card. • No - Wallet is not available.
Credit Card Gateway <i>Required</i>	Select Pineapple.
Gateway Env	<p>Controls if this is a testing environment or live.</p> <ul style="list-style-type: none"> • Production - Required to process customer transactions. • Sandbox - Testing option.
Gateway API Key / User Name <i>Required</i>	Field to enter the Gateway API Key provided by Pineapple.
Gateway Trans. Key / Password <i>Required</i>	Field to enter the password provided by Pineapple.
Gateway Credit Card Merchant ID	Field to enter identification number for credit card provided by Pineapple.
Gateway Bank Merchant ID	Field to enter identification number for bank account provided by Pineapple.
Gateway Settlement Time <i>Required</i>	Indicates the settlement time for the payment batches. Any payments recorded after the time selected will be applied to the next day's payment batch.
Credit Card Bank Account	Select the bank account payments are to be sent to from the available options.
Payment Receipt Notification Template <i>Required</i>	<p>Select the Payment Receipt Notification Template that will be emailed to the customer upon receipt of payment.</p> <p><i>Notification Templates are created in Setup > System > Notification Template</i></p>
Declined Payment Notification Template <i>Required</i>	<p>Select a Declined Payment Notification Template that should be emailed to the customer in the event a payment is declined.</p> <p><i>Notification Templates are created in Setup > System > Notification Template</i></p>
Payment Refund Notification Template <i>Required</i>	<p>Select a Payment Refund Notification Template that should be emailed to the customer in the event a payment is declined.</p> <p><i>Notification Templates are created in Setup > System > Notification Template</i></p>

Work Type Setup

Pathway: *Setup > Operations > Work Type*

If a customer can submit online orders, review the Work Type Setup to confirm it is properly configured and uses naming conventions that can be easily identified and understood by a portal user. More information about Work Type Setup can be found here: [Work Type](#).

UPDATE WORK TYPE

Details

NavuNav Settings

Add/Remove Default Charge Code

ID

FL_EXTRAPU

NAME

FL Extra Pick Up

SELF-SERVICE LABEL

LINE OF BUSINESS

Commercial

INVENTORY MOVE TYPE

None

ACTION CATEGORY

MANIFEST NOTIFICATION TEMPLA

CREATE ONE SERVICE RECORD PE

ENABLE DISPOSAL ENTRY

ENABLE CONSOLIDATION BATCH

PRODUCTIVITY UNITS

DESTRUCTION DATE TRACKING

Route Optimization

ORDER BASELINE SECONDS

DEFAULT SECONDS PER UNIT

Create Order

*Schedule Date

10/25/24 Friday

PO Number

Shipping Tracking ID

*Service

2 Yard Trash Service

*Order Type

FL Extra Pick Up

Quantity

1

Order Note

Save

Cancel

Account Request Type Setup

Pathway: *Setup > Account > Account Request Type*

If the Customer Portal includes the option for customers to submit online requests, request types must be created in **Account Request Type Setup**. More information about Account Request Type Setup and Account Request Management can be found here: [Account Request Type Setup](#) and [Account Request Management](#).

ACCOUNT REQUEST TYPE SETUP

SETUP > ACCOUNT > ACCOUNT REQUEST TYPE

ID	NAME	TYPE	ACTIVE	ALLOW SELF-SERVICE ORDERING	ASSIGN USER BY DEFAULT	DEPARTMENT
1000	Billing Error	Billing	Yes	No	Account Manager	Sales
1001	Refund Request	Billing	Yes	No	Account Manager	Customer Service
1002	Missed Pick Up	Service	Yes	No	Account Manager	Sales
1003	Vacation Hold Services	Service	Yes	No	Account Manager	
1004			Yes	No	Account Manager	
1005			Yes	No	Account Manager	Customer Service
1006			Yes	No	Account Manager	
1007			Yes	No	Account Manager	Operations
1008			Yes	No	Account Manager	Sales
1009			Yes	No	Account Manager	Admin
1010			Yes	No	Account Manager	
1011			Yes	Yes	Account Auditor	Operations
1012			Yes	No	Account Manager	
1013			Yes	No	Account Manager	Admin
1014			Yes	Yes	Account Manager	Customer Service
1015			No	No	Account Manager	
1016			No	No	Account Manager	Operations

ADD ACCOUNT REQUEST TYPE

NAME

TYPE

ACTIVE

ALLOW SELF-SERVICE ORDERING

ASSIGN USER BY DEFAULT

DEPARTMENT

SAVE

Field	Description
Name <i>Required</i>	Enter a name for the request that will be displayed as the reason visible to the customer in the portal.
Type <i>Required</i>	Select the category type that best aligns with the request.
Active	Controls the availability of the request for selection and use.
Allow Self-Service Ordering	Set to 'Yes' and the request will be available for selection on the portal.
Assign User By Default	Indicates who portal requests will be assigned to. In Account Request Management , requests can be filtered down by user.
Department	Option to categorize requests by department. In Account Request Management, requests can be filtered down by department.

Grant Customer Contacts Portal Access

Pathway: [Accounts > Contacts](#)

After completing the setup, grant customers access to their portal accounts through the Contacts section of the Customer Service screen. Ensure that contacts, whether site-level or account-level, are added to the account before granting portal access. Learn how to add contacts to an account here- [Add and Edit Account Contacts](#).

Optional setup is available to automatically send portal invitations to new contacts and to allow customers to self-register for a Customer Portal account, following the process outlined in this article: [Setting Up Portal Access for Contacts](#)

Details Tab

Use the **Details** tab to add a contact and enable their portal access. The fields on the **Details** tab will update after the contact is added, saved, and reopened, including the **Send Portal Access Invite** field which requires the entry of the contact's email address where the portal invite can be sent.

EDIT CONTACT

?

✕

Details

Customer Portal Access

Tags

Activity History

TITLE

NAME

Customer Example

EMAIL

Email@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

No

SERVICE NOTIFICATION METHOD

REQUEST NOTIFICATION METHOD

None

BILLING CONTACT

None

RECEIVE INVOICE NOTIFICATIONS

No

(Notifications are only sent for accounts with invoice delivery set to email)

RECEIVE PASTDUE NOTIFICATION

No

MOBILE OPT OUT?

☐

ENABLE PORTAL ACCESS

☒

PORTAL USER

SEND PORTAL ACCESS INVITE

SAVE

UNLINK FROM ACCOUNT

Customer Portal Access Tab

Use the **Customer Portal Access** tab to manage a contact's access level.

CONTACTS

TYPE	BILLING CONTACT	NAME	TITLE	EMAIL	PHONE	SERVICE NOTIFICATION	REQUEST NOTIFICATION	PORTAL USER
Account	None	Matthew				Email	None	No
Account	None	Tom Brown		TomB@FakeEm...		Email	None	No

EDIT CONTACT

Details **Customer Portal Access** Tags Activity History

ACCESS

ROLE 1

ROLE 2

☐ Account (All Sites)

☒ 41898001 Active Navusoft - Demo
5 Post Oak Blvd
Houston, TX 77027

☒ 41898002 Active Navusoft - Demo Site 2
8100 Washington Ave
Houston, TX 77007-1062

☐ 41898003 Active Navu Waste
1234 Clone St
Houston, TX 77057

SAVE **UNLINK FROM ACCOUNT**

Grant Access to All Sites (Account Level Contact)

To grant an account contact access to all sites within the portal, select the **Account (All Sites)** checkbox.

Grant Limited Site Access (Site Level Contact)

To restrict a contact's portal access to specific sites, deselect the **Account (All Sites)** checkbox and check only the boxes for the sites the contact is permitted to access.

Optional Setup - Reports

Pathway: Setup > Report Formats > Customer Portal Reports (Tab) and Setup > Accounts > Account Class > Customer Portal (tab)

If reports are available, go to the **Report Format Setup** screen and open the **Customer Portal Reports** tab. Review the available reports and set **Enable Customer Portal Access** to 'Yes' for each report you want to display on the portal. Additionally, the 'Enable Report Access' field must also be set to 'Yes' for the account class.

SELECT ACCOUNT1 of 17

SELECT SERVICE LOCATION1 of 1

49232 Caribou Coffee

49232001 Caribou Coffee 112 Chieftain St, Osceola WI

REPORT HISTORY

PeriodAll

DATE ↓

FILE NAME

Revenue By Period

ACCOUNT ID	SITE ID	SITE NAME	PERIOD	REVENUE	SURCHARGES	ADJUSTMENTS
49232	49232001	Caribou Coffee	2024-11	\$ 3,208.87	\$ 18.92	\$ 0.00

Report Details							
SITE ID	SITE NAME	DATE	TYPE	AMOUNT	SALESREP	DIVISION NAME	SERVICE REGION
49232001	Caribou Coffee	2024-11-01	Manual Charges	1100.00	John Doe	HOUSTON	Upper Region
49232001	Caribou Coffee	2024-11-04	Manual Charges	2000.00	John Doe	HOUSTON	Upper Region
49232001	Caribou Coffee	2024-11-01	Recurring services	103.92	John Doe	HOUSTON	Upper Region
49232001	Caribou Coffee	2024-11-30	Manual Charges	4.95	John Doe	HOUSTON	Upper Region

Related Articles

- Bulk Send Portal Invites
- Setting Up Portal Access for Contacts
- Customer Portal - Manage Autopay
- Customer Portal - Make a Payment
- Customer Portal - Wallet