

Customer Portal Setup

Last Modified on 02/04/2025 12:30 pm PST

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

SELECT ACCOUNT 1 of 16

49232 Caribou Coffee

SELECT SERVICE LOCATION 1 of 1

49232001 Caribou Coffee 112 Chieftain St, Osceola WI

\$ 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

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	<input type="text"/>			LOGIN MESSAGE(HTML)	<input type="text"/>		
DISPLAY SERVICE HISTORY	No			LOGIN TERMS(HTML)	<input type="text"/>		
DISPLAY AR HISTORY	Yes			MAKE A PAYMENT TERMS	<input type="text"/>		
DISPLAY AGING BUCKETS	Yes			LOGIN LOGO	<input type="text"/>	BROWSE...	
DISPLAY LOGIN TERMS	No			LOGIN LOGO URL	View		
DISPLAY CURRENT SERVICES	No			GRAPHICS STYLE (CSS)	UPLOAD	EDIT	DOWNLOAD
DISPLAY SERVICE QUANTITY	No			GRAPHICS STYLE URL	View		
ENABLE PAYMENT AS GUEST	No						
ENABLE AUTO PAY MAX AMOUNT	No						
DISPLAY THIRD PARTY INVOICES	No						
ACCOUNT INVITE FROM EMAIL	<input type="text"/>						
INVITE EMAIL TEMPLATE	<input type="text"/>						
ENABLE ACCOUNT REQUEST VIA ADDRESS	No						
ACCOUNT REQUEST ADDRESS FOUND TEMPLATE	<input type="text"/>						

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.

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 ? X

Details
Customer Portal
Payment Processing
Status Management
Finance Charges and Other Fees

ENABLE PORTAL ACCESS	Yes <input type="button" value="v"/>
CUSTOMER PORTAL HOME PAGE	<input type="button" value="v"/>
ENABLE ADD SITES	No <input type="button" value="v"/>
NEW LOCATION TEMPLATE	<input type="button" value="v"/>
NEW LOCATION BUNDLE	<input type="button" value="v"/>
ENABLE ON CALL ORDERS	No <input type="button" value="v"/>
ENABLE REPORT ACCESS	<input type="button" value="v"/>
ENABLE VIEWING INACTIVE SITE	No <input type="button" value="v"/>
DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL	No <input type="button" value="v"/>
DEFAULT WORK ORDER ATTACHMENT - DISPLAY IN CUSTOMER PORTAL	No <input type="button" value="v"/>

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.

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

<p>NAME <input style="width: 95%;" type="text"/></p> <p>MAIN PHONE <input style="width: 95%;" type="text" value="(999) 999-9999"/></p> <p>TOLL FREE PHONE <input style="width: 95%;" type="text" value="(999) 999-9999"/></p> <p>FAX <input style="width: 95%;" type="text" value="(999) 999-9999"/></p> <p>EMAIL <input style="width: 95%;" type="text"/></p> <p>TIME ZONE <input style="width: 95%;" type="text"/></p> <p>SERVICE NOTIFICATION FROM EMAIL <input style="width: 95%;" type="text"/></p> <p>DIVISION GROUP <input style="width: 95%;" type="text"/></p> <p>EPA ID <input style="width: 95%;" type="text"/></p> <p>GL SEGMENT <input style="width: 95%;" type="text"/></p>		<p>AUTO PROCESS SERVICE CHANGES <input style="width: 95%;" type="text"/></p> <p>ENABLE INTEGRATION <input style="width: 95%;" type="text"/></p> <p>LOCK BOX IMPORT FORMAT <input style="width: 95%;" type="text"/></p> <p>LOCK BOX NON-MATCHING DEFAULT ACCOUNT <input style="width: 95%;" type="text"/></p> <p>CUSTOMER PORTAL URL <input style="width: 95%;" type="text"/></p> <p>CUSTOMER PORTAL PAST DUE TEXT <input style="width: 95%;" type="text"/></p> <p>MAILCHIMP API KEY <input style="width: 95%;" type="text"/></p> <p>MAILCHIMP LIST ID <input style="width: 95%;" type="text"/></p> <p>SMS TASK DEFAULT USER <input style="width: 95%;" type="text"/></p> <p>RO DISPOSAL REV % <input style="width: 95%;" type="text" value="0.00"/></p>
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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

<p>ENABLE CREDIT CARD PROCESSING <input style="width: 95%;" type="text" value="No"/></p> <p>CREDIT CARD GATEWAY <input style="width: 95%;" type="text" value="None"/></p> <p>GATEWAY ENV <input style="width: 95%;" type="text"/></p> <p>GATEWAY API KEY / USER NAME <input style="width: 95%;" type="text"/></p> <p>GATEWAY TRANS. KEY / PASSWORD <input style="width: 95%;" type="text"/></p> <p>GATEWAY CREDIT CARD MERCHANT ID <input style="width: 95%;" type="text"/></p> <p>GATEWAY BANK MERCHANT ID <input style="width: 95%;" type="text"/></p> <p>GATEWAY SETTLEMENT TIME <input style="width: 95%;" type="text" value="-- : -- --"/></p> <p>CREDIT CARD BANK ACCOUNT <input style="width: 95%;" type="text"/></p> <p>PAYMENT RECEIPT NOTIFICATION TEMPLATE <input style="width: 95%;" type="text"/></p> <p>DECLINED PAYMENT NOTIFICATION TEMPLATE <input style="width: 95%;" type="text"/></p> <p>PAYMENT REFUND NOTIFICATION TEMPLATE <input style="width: 95%;" type="text"/></p>		
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Field

Description and Use

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"> • <i>Yes (Credit Card & ACH)</i> - Customers can add a credit card or bank routing information to wallet, or make a payment with either option. • <i>Yes (Credit Cards Only)</i> - Customers can only add a credit card to wallet, or make a payment with a credit card. • <i>No</i> - 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

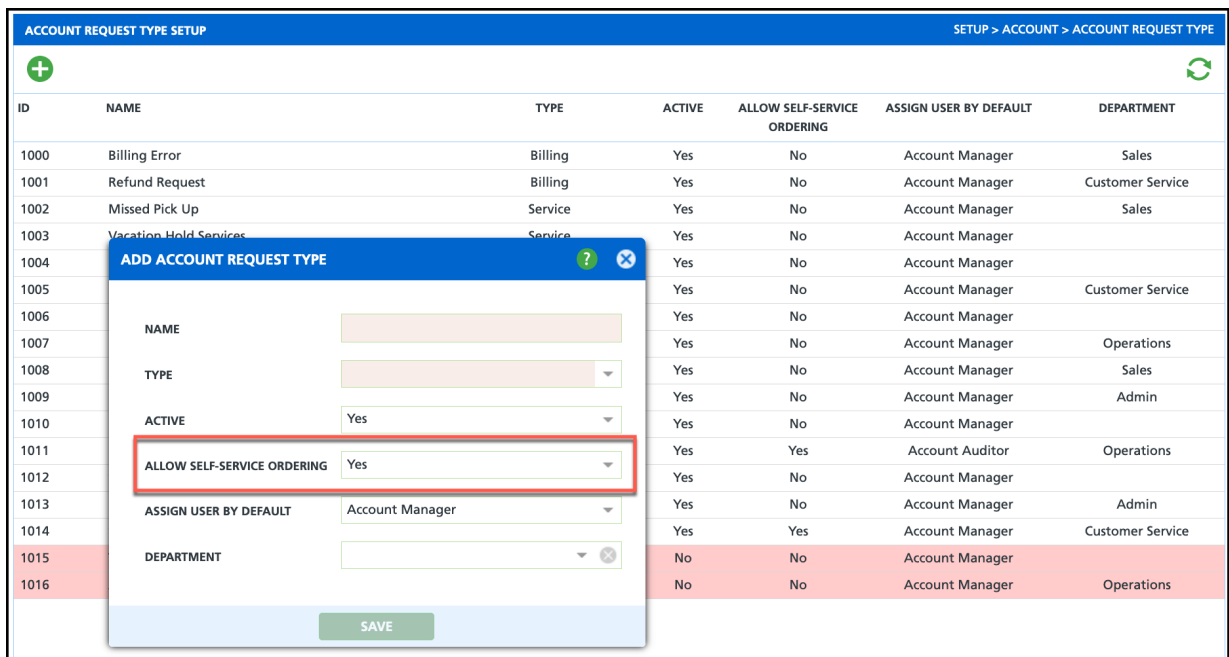
Order Note:

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](#).



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](#).

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

EMAIL 

EMAIL 2

PHONE 1

PHONE 2

PHONE 3

PHONE 4

NOTE

RECEIVE SERVICE NOTIFICATIONS

SERVICE NOTIFICATION METHOD


REQUEST NOTIFICATION METHOD


BILLING CONTACT

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

RECEIVE PASTDUE NOTIFICATION

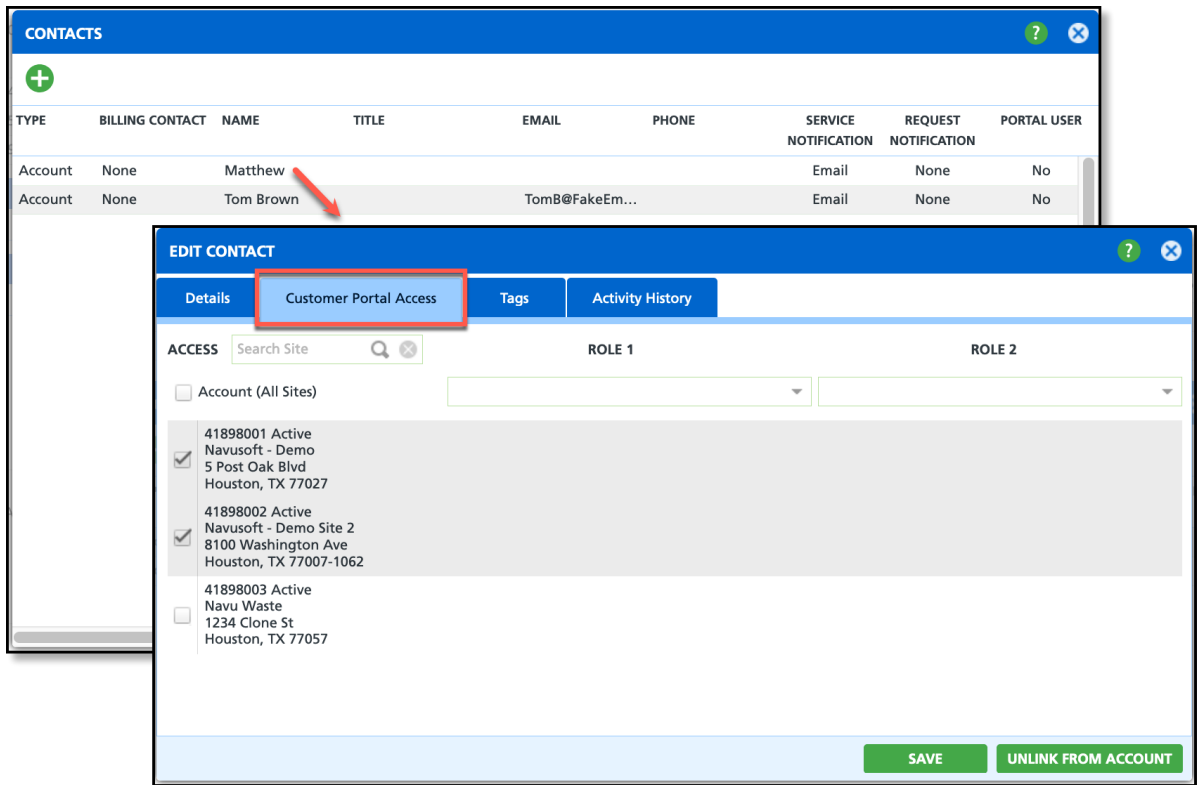
MOBILE OPT OUT?

ENABLE PORTAL ACCESS 

PORTAL USER 

Customer Portal Access Tab

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



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 ACCOUNT 1 of 17 **SELECT SERVICE LOCATION** 1 of 1
 49232 Caribou Coffee 49232001 Caribou Coffee 112 Chieftain St, Osceola WI
 REPORT HISTORY Period All
 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](#)
- [Customer Portal - Manage Autopay](#)
- [Customer Portal - Make a Payment](#)
- [Customer Portal - Wallet](#)