Setting Up Portal Access for Contacts

Last Modified on 07/21/2025 9:40 am PDT

Pathway: Accounts > Contacts

Grant contacts access to their customer portal account by following the process outlined below. Contacts can be added at either the site level or account level, depending on the level of access you want to provide within the portal.



Prerequisites

A contact must be added to the account or site before they can be granted access to the customer portal. More information about creating or adding a contact to an account can be found here: Add and Edit Account Contact.

Edit Contact

Open the **Contacts** screen and double-click the contact you want to grant portal access to. This will open the 'Edit Contact' popup, where you can send the portal invitation and enable access at either the account level or site level using the **Details** and **Customer Portal Access** tabs.

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		4405 F Blaine US (O) +1 ERMS	Pheasant Rid e, MN 55449- 1 555-555-783 5 5 CE DELIVERY	ge Dr NE 4531 28 Net 20 Email with Link		Active DIVISION ACCOUNT MGR CLASS BILL GROUP ADVANCE - MONTHL	QAWASTE Aliena Somers - Admin- COMMERCIAL QA Billing Cycle Y Billed Thru Date None	·NS (Sales)	<u>3 (</u>	of 3 225 Sain Ram US +1 6	Rice St ht Paul, MN 55103 hsey County Down 551-504-3327	3-2123 ntown
	0			rs							2 8	
HIGHLI	GHTS ACTIVE SE	RVICES (0)	ТҮРЕ	BILLING CONTACT	NAME	TITLE	EMAIL	PHONE	SERVICE NOTIFICATION	REQUEST NOTIFICATION	PORTAL USER	
	QTY S	SERVICE CO	Account	Primary Billing	John Doe		somers378@gmai	l	No	None	Yes	UNIT RATE
	ALENDA	R 📄 SUN	<u>c</u>	_								THU
			۱۱	un 15 💿 (1 vie	ws) - Aliena Somers	Jun 16		Jun 17		Jun 18		

Details Tab

Use the **Details** tab to send a portal access invite to an existing contact. The checkbox becomes available after the contact has been saved and reopened, and it requires a valid email address to send the invitation.

EDIT CONTAC	л —	_			2	8
Details	Customer Port	tal Access	Tags	Activity Histo	ry	
TITLE						
NAME		Customer Ex	ample			
EMAIL		Email@fake	Email.com			
EMAIL 2						
PHONE 1		• (99	9) 999-9999	~		
PHONE 2		• (99	9) 999-9999	-		
PHONE 3		▼ (999) 999-9999 ▼ (999) 999-9999		-		
PHONE 4				~		
NOTE						
RECEIVE SERVICI	E NOTIFICATIONS	No		*		
SERVICE NOTIFIC	ATION METHOD			*		
REQUEST NOTIFI	ICATION METHOD	None		*		
BILLING CONTAC	Т	None		~		
RECEIVE INVOIC	E NOTIFICATIONS	NO		Ŧ	(NOTIFICATIONS are only sent for accounts with invoice delivery set to ema	ail)
RECEIVE PASTDU	JE NOTIFICATION	No		•		
MOBILE OPT OU	Τ?	_				
ENABLE PORTAL ACCESS						
PORTAL USER		SEND POR	TAL ACCESS IN			
					SAVE UNLINK FROM ACCOUN	лт

Customer Portal Access Tab

Use the **Customer Portal Access** tab to manage a contact's access level. Access can be granted at the account level or restricted to the site level.



Grant Access to All Sites (Account Level Contact)

To grant a contact access to all sites that belong to the account, 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.

Auto Send Portal Invites [Optional Setup]

This optional setup allows portal invitations to be automatically sent to contacts when they are 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.

UPDATE ACCOL	UNT CLASS				?	8
Details	Customer Portal Pay	ment Processing	Status Management	Finance Charges and Other Fees		
ENABLE PORTA	L ACCESS	Yes	•			
CUSTOMER POP	RTAL HOME PAGE	Standard	*			
ENABLE ADD SI	ITES	No	*			
NEW LOCATION	N TEMPLATE	COMM-Dayton	~			
NEW LOCATION	N BUNDLE		*			
ENABLE ON CA	LL ORDERS	Yes	*			
ENABLE REPOR	T ACCESS	Yes	-			
ENABLE VIEWIN	NG INACTIVE SITE	Service History Only	-			
DEFAULT WORK CUSTOMER POP	DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL		~			
DEFAULT WORK DISPLAY IN CUS	K ORDER ATTACHMENT - STOMER PORTAL	Yes	•			
AUTO SEND PO CREATION	DRTAL INVITATION ON CONTACT	Yes	-			
ALLOW INVOIC	E-VERIFIED SELF REGISTRATION	Yes	v			

Add Contact to New (Active) Account

When a new active account is created, and the account class has 'Auto Send Portal Invitation on Contact Creation' set to 'Yes' and an email address is entered for the contact, a Customer Portal invitation will be sent automatically.

Add Contact to Existing (Active) Account

When creating a new contact for an active account, an email will be automatically sent if the account class has 'Auto Send Portal Invitation on Contact Creation' set to 'Yes' and an email address is entered for the contact.

Self Register Setup [Optional Setup]

This optional setup allows customers to self-register for a Customer Portal account using information from a recent invoice.

System Settings: System Options [Customer Portal]

To allow customers to request portal access from the sign-in page, enable the **"Enable Request Login Button"** setting in the Customer Portal section of System Options Setup.

System	Sales	Integration		Account	Operation	ns	Customer Portal	Broker	Online Order		
CUSTOME	R PORTAL URL						LOGIN MES	SAGE(HTML)	Testing login message.		
DISPLAY SI	ERVICE HISTORY		Yes 📼								
DISPLAY A	R HISTORY		Yes 💌			LOGIN TER	MS(HTML)	Testing login terms			
DISPLAY A	GING BUCKETS		Yes			Ŧ	MAKE A PA	YMENT TERMS			
DISPLAY LO	OGIN TERMS		Yes			Ŧ		*****			
DISPLAY C	URRENT SERVICES		Yes			Ŧ	LOGIN	• • • • •			
DISPLAY SI	ERVICE QUANTITY	,	Yes			Ŧ	LOGIN		Login to Manage your Account		
ENABLE PA	YMENT AS GUEST	г	Yes			~	GRAPH	•••	Username		AD
ENABLE AU	JTO PAY MAX AM	IOUNT	Yes			*	GRAPH	••••			
DISPLAY TI	HIRD PARTY INVO	ICES	No			*			Password		8
ACCOUNT	INVITE FROM EM	AIL							Show My Password		
INVITE EM.	AIL TEMPLATE		Porta	al Invite (All Di	visions)	~			L a sta		
ENABLE AG	COUNT REQUEST	VIA ADDRESS	Yes			Ŧ			Login		
ACCOUNT	REQUEST ADDRE	SS FOUND	Porta	al Invite (All Div	visions)	~					
ENABLE RE	QUEST LOGIN BU	TTON	Yes			-			<u>incquest togin</u>		
							1		lesting login terms		
						-	l·		er se t		
									Invoice Quick Pay		
							1		Submit Quick Request		1
							•		- Japinit Quick Nequest		

System Settings: Account Class [Customer Portal]

Enable "Allow Invoice-Verified Self Registration" in Account Class Setup 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.

9							
Ť	NAME DEFAULT A CREDIT LIM	CCOUNT DEFAULT	ACCOUNT	DEFAULT REBATE	PAYMENT TYPE DEFAULT BILL BY SITE	GL SEGMENT	
000	RESIDENTIAL 0	Net 20		Mail Check Acc	count	12000	
001	ADD ACCOUNT CLASS				(
002			Concernance of			000	
003	Details Customer Portal Pay	ment Processing	Status Ma	nagement	Finance Charges and Other Fees	000	
007	ENABLE PORTAL ACCESS	Yes	-				
800			-				
09	CUSTOMER PORTAL HOME PAGE		*				
010	ENABLE ADD SITES	No	*		Please enter the inform	nation from a recent	
211	NEW LOCATION TEMPLATE		-		Invoice to verify you	r account and an	
012	NEW LOCATION BUNDLE		-		sent to the provide	d email address.	
013	ENABLE ON CALL ORDERS	No	-				
214	ENABLE REPORT ACCESS		-		Invoice #		
	ENABLE VIEWING INACTIVE SITE	No	-				
	DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL	No	-		Quick Pay Code / Accou	unt #	
	DEFAULT WORK ORDER ATTACHMENT - DISPLAY IN CUSTOMER PORTAL	No	~				
	AUTO SEND PORTAL INVITATION ON CONTACT CREATION	No	~	-	Contact Name		
_	ALLOW INVOICE-VERIFIED SELF REGISTRATION	No	•				
			SAVE		Email Address		
			SATE		-		
					and the second second		
					Subm	nit	
					1. 1. 1. 1.		
						Back to Login	

Related Articles

Add and Edit Contacts Customer Portal Setup