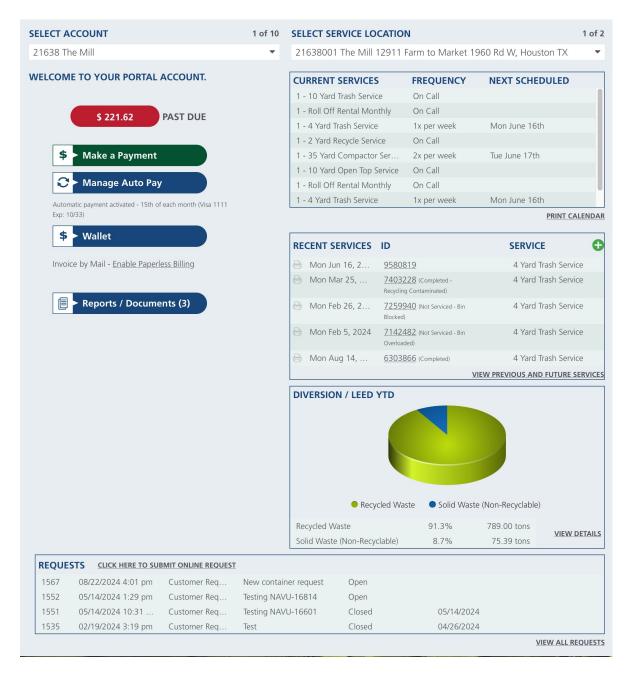
Setting Up Portal Access for Contacts

Last Modified on 06/16/2025 10:10 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.

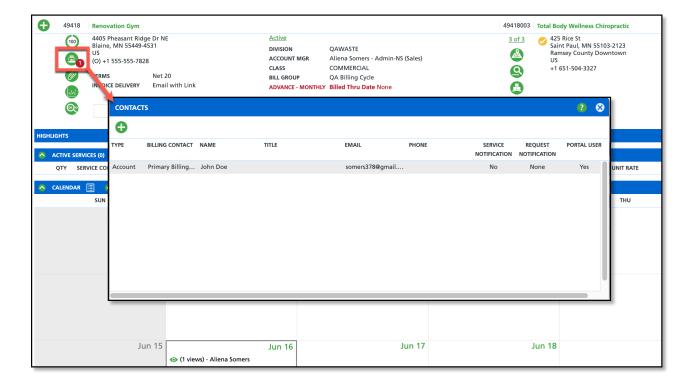


Prerequisites

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.

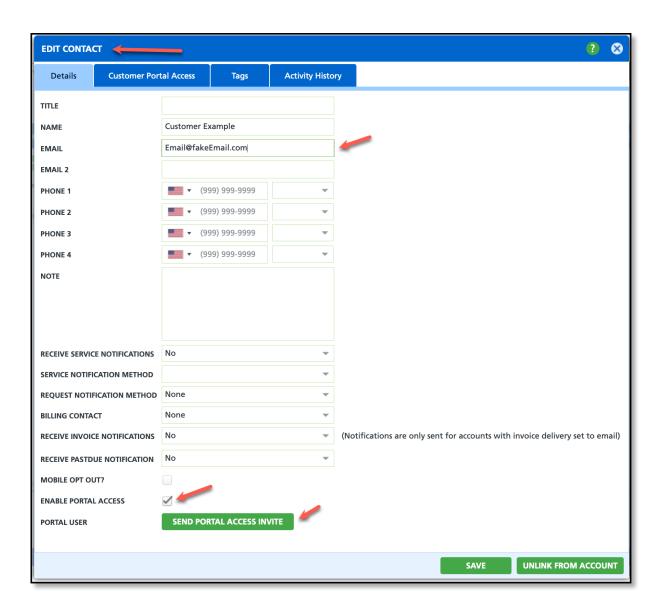
Edit Contact

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.



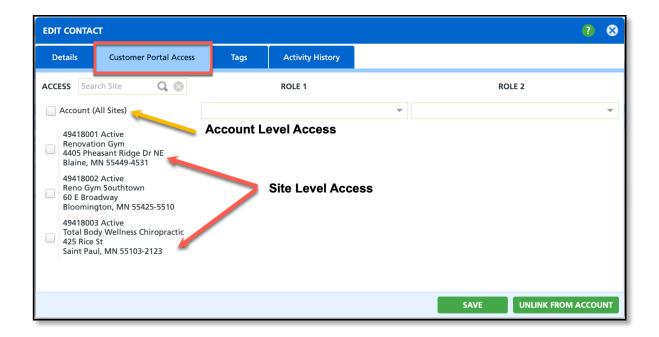
Details Tab

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.



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.

Related Articles

Add and Edit Contacts
Customer Portal Setup