

# 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.

SELECT ACCOUNT1 of 10

21638 The Mill

WELCOME TO YOUR PORTAL ACCOUNT.

\$ 221.62PAST DUE

\$

Make a Payment

Manage Auto Pay

Automatic payment activated - 15th of each month (Visa 1111 Exp: 10/33)

\$

Wallet

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

Reports / Documents (3)

SELECT SERVICE LOCATION1 of 2

21638001 The Mill 12911 Farm to Market 1960 Rd W, Houston TX

CURRENT SERVICESFREQUENCYNEXT SCHEDULED

1 - 10 Yard Trash ServiceOn Call

1 - Roll Off Rental MonthlyOn Call

1 - 4 Yard Trash Service1x per weekMon June 16th

1 - 2 Yard Recycle ServiceOn Call

1 - 35 Yard Compactor Ser...2x per weekTue June 17th

1 - 10 Yard Open Top ServiceOn Call

1 - Roll Off Rental MonthlyOn Call

1 - 4 Yard Trash Service1x per weekMon June 16th

[PRINT CALENDAR](#)

RECENT SERVICESIDSERVICE

Mon Jun 16, 2...95808194 Yard Trash Service

Mon Mar 25, ...7403228 (Completed - Recycling Contaminated)4 Yard Trash Service

Mon Feb 26, 2...7259940 (Not Serviced - Bin Blocked)4 Yard Trash Service

Mon Feb 5, 20247142482 (Not Serviced - Bin Overloaded)4 Yard Trash Service

Mon Aug 14, ...6303866 (Completed)4 Yard Trash Service

[VIEW PREVIOUS AND FUTURE SERVICES](#)

DIVERSION / LEED YTD

Recycled Waste

Solid Waste (Non-Recyclable)

Recycled Waste91.3%789.00 tons

Solid Waste (Non-Recyclable)8.7%75.39 tons

[VIEW DETAILS](#)

REQUESTSClick here to submit online request

156708/22/2024 4:01 pmCustomer Req...New container requestOpen

155205/14/2024 1:29 pmCustomer Req...Testing NAVU-16814Open

155105/14/2024 10:31 ...Customer Req...Testing NAVU-16601Closed05/14/2024

153502/19/2024 3:19 pmCustomer Req...TestClosed04/26/2024

[VIEW ALL REQUESTS](#)

## 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

**49418 Renovation Gym**

4405 Pheasant Ridge Dr NE  
Blaine, MN 55449-4531  
US  
(O) +1 555-555-7828

**ERMS Net 20**  
**INVOICE DELIVERY Email with Link**

**HIGHLIGHTS**

- ACTIVE SERVICES (0)
- QTY SERVICE CO
- CALENDAR

**Active**

DIVISION QAWASTE  
ACCOUNT MGR Aliena Somers - Admin-NS (Sales)  
CLASS COMMERCIAL  
BILL GROUP QA Billing Cycle

**ADVANCE - MONTHLY Billed Thru Date None**

**49418003 Total Body Wellness Chiropractic**

425 Rice St  
Saint Paul, MN 55103-2123  
Ramsey County Downtown US  
+1 651-504-3327

### CONTACTS

TYPE	BILLING CONTACT	NAME	TITLE	EMAIL	PHONE	SERVICE NOTIFICATION	REQUEST NOTIFICATION	PORTAL USER
Account	Primary Billing...	John Doe		somers378@gmail....		No	None	Yes

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.

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EDIT CONTACT

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✕

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. Access can be granted at the account level or restricted to the site level.

**EDIT CONTACT**

Details **Customer Portal Access** Tags Activity History

ACCESS Search Site [Q] [X] ROLE 1 ROLE 2

☐ Account (All Sites) **Account Level Access**

☐ 49418001 Active  
Renovation Gym  
4405 Pheasant Ridge Dr NE  
Blaine, MN 55449-4531

☐ 49418002 Active  
Reno Gym Southtown  
60 E Broadway  
Bloomington, MN 55425-5510 **Site Level Access**

☐ 49418003 Active  
Total Body Wellness Chiropractic  
425 Rice St  
Saint Paul, MN 55103-2123

SAVE UNLINK FROM ACCOUNT

### 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.

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## Related Articles

[Add and Edit Contacts](#)

[Customer Portal Setup](#)

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