

# Setting Up Portal Access for Contacts

Last Modified on 06/29/2026 1:12 pm 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 ACCOUNT** 1 of 10

21638 The Mill ▼

**SELECT SERVICE LOCATION** 1 of 2

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

**WELCOME TO YOUR PORTAL ACCOUNT.**

\$ 221.62
PAST 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)

CURRENT SERVICES	FREQUENCY	NEXT SCHEDULED
1 - 10 Yard Trash Service	On Call	
1 - Roll Off Rental Monthly	On Call	
1 - 4 Yard Trash Service	1x per week	Mon June 16th
1 - 2 Yard Recycle Service	On Call	
1 - 35 Yard Compactor Ser...	2x per week	Tue June 17th
1 - 10 Yard Open Top Service	On Call	
1 - Roll Off Rental Monthly	On Call	
1 - 4 Yard Trash Service	1x per week	Mon June 16th

[PRINT CALENDAR](#)

RECENT SERVICES	ID	SERVICE
🗑️ Mon Jun 16, 2...	9580819	4 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, 2024	7142482 (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 Waste	91.3%	789.00 tons
Solid Waste (Non-Recyclable)	8.7%	75.39 tons

[VIEW DETAILS](#)

**REQUESTS** [CLICK HERE TO SUBMIT ONLINE REQUEST](#)

1567	08/22/2024 4:01 pm	Customer Req...	New container request	Open	
1552	05/14/2024 1:29 pm	Customer Req...	Testing NAVU-16814	Open	
1551	05/14/2024 10:31 ...	Customer Req...	Testing NAVU-16601	Closed	05/14/2024
1535	02/19/2024 3:19 pm	Customer Req...	Test	Closed	04/26/2024

[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

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.



The screenshot shows a software interface with two contact cards at the top. The left card is for 'Renovation Gym' (ID: 49418) and the right card is for 'Total Body Wellness Chiropractic' (ID: 49418003). A 'CONTACTS' popup window is open in the center, displaying a table with the following data:

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

Below the table, a calendar view shows dates from Jun 15 to Jun 18. A status bar at the bottom indicates '(1 views) - Aliena Somers'.

## 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 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. 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 [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.

## 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 ACCOUNT CLASS**

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

ENABLE PORTAL ACCESS Yes

ENABLE ADD SITES No

NEW LOCATION BUNDLE

ENABLE REPORT ACCESS Yes

DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL Yes

**AUTO SEND PORTAL INVITATION ON CONTACT CREATION Yes**

CUSTOMER PORTAL HOME PAGE Standard

NEW LOCATION TEMPLATE COMM-Dayton

ENABLE ON CALL ORDERS Yes

ENABLE VIEWING INACTIVE SITE Service History Only

DEFAULT WORK ORDER ATTACHMENT - DISPLAY IN CUSTOMER PORTAL Yes

ALLOW INVOICE-VERIFIED SELF REGISTRATION Yes

### 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 Login page, enable the "Enable Request Login Button" setting in the Customer Portal section of System Options Setup.

The screenshot shows the 'SYSTEM OPTIONS SETUP' interface for the 'Customer Portal' section. The 'ENABLE REQUEST LOGIN BUTTON' setting is highlighted in yellow and set to 'Yes'. An inset shows the login page with the 'Request Login' button highlighted.

System Options	Value
CUSTOMER PORTAL URL	
DISPLAY SERVICE HISTORY	Yes
DISPLAY AR HISTORY	Yes
DISPLAY AGING BUCKETS	Yes
DISPLAY LOGIN TERMS	Yes
DISPLAY CURRENT SERVICES	Yes
DISPLAY SERVICE QUANTITY	Yes
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)
<b>ENABLE REQUEST LOGIN BUTTON</b>	<b>Yes</b>

Inset: Login to Manage your Account

- Username
- Password
- Show My Password
- Login
- Forgot or Reset Password
- Request Login**
- Testing login terms
- Invoice Quick Pay
- Submit Quick Request

### 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.

The screenshot shows the 'UPDATE ACCOUNT CLASS' interface for the 'Customer Portal' section. The 'ALLOW INVOICE-VERIFIED SELF REGISTRATION' setting is highlighted in yellow and set to 'Yes'. An inset shows the self-registration form with the 'Invoice #' field highlighted.

Account Class Settings	Value
ENABLE PORTAL ACCESS	Yes
ENABLE ADD SITES	No
NEW LOCATION BUNDLE	
ENABLE REPORT ACCESS	Yes
DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL	Yes
AUTO SEND PORTAL INVITATION ON CONTACT CREATION	Yes
<b>ALLOW INVOICE-VERIFIED SELF REGISTRATION</b>	<b>Yes</b>

Customer Portal Home Page: Standard

New Location Template: COMM-Dayton

Enable on Call Orders: Yes

Enable Viewing Inactive Site: Service History Only

Default Work Order Attachment - Display in Customer Portal: Yes

Inset: Self-Registration Form

- Please enter the information from a recent Invoice to verify your account and an invitation with login information will be sent to the provided email address.
- Invoice #
- Quick Pay Code / Account #
- Contact Name
- Email Address
- Submit
- Back to Login

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## Related Articles

[Add and Edit Contacts](#)

[Customer Portal Setup](#)

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