

Customer Portal - Ability to Self-Register and Auto Send Portal Invites (18439, 18449) [New Feature]

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New setup fields and logic have been added to **System Options** and **Account Class Setup** to support automatically sending portal invitations to new contacts and allowing customers to self-register using a recent invoice.

Self Register Setup

System Settings: System Options [Customer Portal]

A new **"Enable Request Login Button"** option has been added to the Customer Portal section in System Options Setup. This setting controls whether the **"Request Login"** link is displayed on the Customer Portal sign-in page.

The screenshot displays the 'SYSTEM OPTIONS SETUP' interface with the 'Customer Portal' tab selected. The 'ENABLE REQUEST LOGIN BUTTON' field is highlighted in yellow. An inset shows the Customer Portal login page with the 'Request Login' button highlighted by a red arrow.

System	Sales	Integration	Account	Operations	Customer Portal	Broker	Online Order
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)					
ENABLE REQUEST LOGIN BUTTON		Yes					
LOGIN MESSAGE(HTML)					Testing login message.		
LOGIN TERMS(HTML)					Testing login terms		
MAKE A PAYMENT TERMS							
LOGIN							
GRAPH							
GRAPH							

Inset: Customer Portal Login Page

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]

A new field, **"Allow Invoice-Verified Self Registration,"** has been added to Account Class Setup. When enabled, it allows customers to request a portal login invitation using a recent invoice that includes an invoice number and either a quick pay code or an account number.

ACCOUNT CLASS SETUP

ID ↑	NAME	DEFAULT ACCOUNT CREDIT LIMIT	DEFAULT ACCOUNT TERM	DEFAULT REBATE PAYMENT TYPE	DEFAULT BILL BY SITE	GL SEGMENT
1000	RESIDENTIAL	0	Net 20	Mail Check Account		12000
1001						
1002						
1003						
1004						
1007						
1008						
1009						
1010						
1011						
1012						
1013						
1014						

ADD ACCOUNT CLASS

Details

Customer Portal

Payment Processing

Status Management

Finance Charges and Other Fees

ENABLE PORTAL ACCESS

Yes

CUSTOMER PORTAL HOME PAGE

ENABLE ADD SITES

No

NEW LOCATION TEMPLATE

NEW LOCATION BUNDLE

ENABLE ON CALL ORDERS

No

ENABLE REPORT ACCESS

ENABLE VIEWING INACTIVE SITE

No

DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL

No

DEFAULT WORK ORDER ATTACHMENT - DISPLAY IN CUSTOMER PORTAL

No

AUTO SEND PORTAL INVITATION ON CONTACT CREATION

No

ALLOW INVOICE-VERIFIED SELF REGISTRATION

No

SAVE

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](#)

Auto Send Portal Invites

System Settings: Account Class [Customer Portal]

A new field, "Auto Send Portal Invitation on Contact Creation," has been added to Account Class Setup. When enabled, it automatically sends a portal invitation to contacts upon creation, provided a valid email address is entered.

ACCOUNT CLASS SETUP

ID ↑	NAME	DEFAULT ACCOUNT CREDIT LIMIT	DEFAULT ACCOUNT TERM	DEFAULT REBATE PAYMENT TYPE	DEFAULT BILL BY SITE	GL SEGMENT
1000	RESIDENTIAL	0	Net 20	Mail Check Account		12000
1001						000
1002						000
1003						000
1004						0001
1007						000
1008						000
1009						000
1010						000
1011						000
1012						000
1013						000
1014						000

ADD ACCOUNT CLASS
?
✕

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

ENABLE PORTAL ACCESS Yes

CUSTOMER PORTAL HOME PAGE

ENABLE ADD SITES No

NEW LOCATION TEMPLATE

NEW LOCATION BUNDLE

ENABLE ON CALL ORDERS No

ENABLE REPORT ACCESS

ENABLE VIEWING INACTIVE SITE No

DEFAULT WORK ORDER PHOTO - DISPLAY IN CUSTOMER PORTAL No

DEFAULT WORK ORDER ATTACHMENT - DISPLAY IN CUSTOMER PORTAL No

AUTO SEND PORTAL INVITATION ON CONTACT CREATION No

ALLOW INVOICE-VERIFIED SELF REGISTRATION No

SAVE

Logic Updates to Add Account and Add Contact

The following logic has been implemented to support automatically sending a portal invitation to contacts on both new and existing accounts:

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.