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

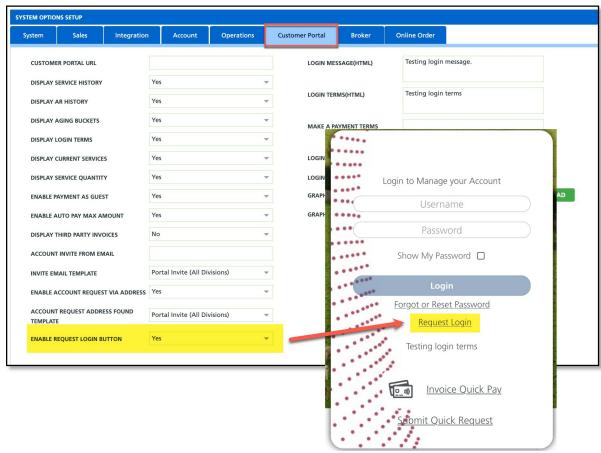
Last Modified on 06/18/2025 11:21 am PDT

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**

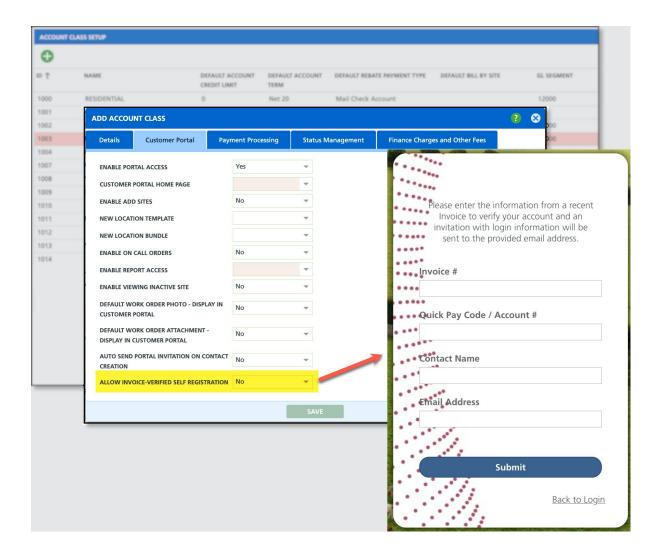
## System Settings: System Options [Customer Portal]

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.



#### **System Settings: Account Class [Customer Portal]**

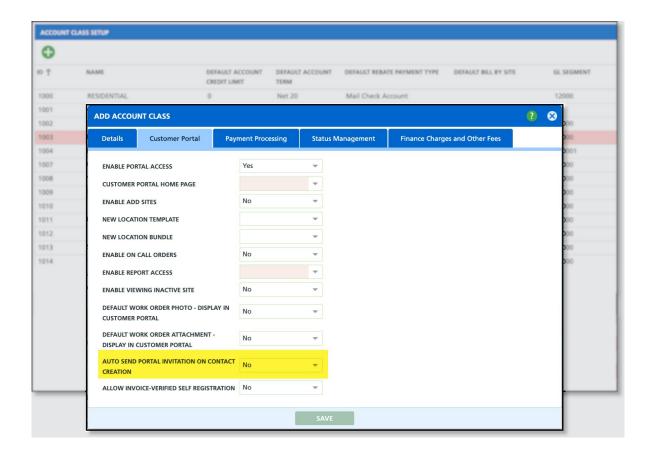
A new field, "Allow Invoice-Verified Self Registration," has been added to Account Class Setup. When enabled, it allows customers to request a portal login invitation using a recent invoice that includes an invoice number and either a quick pay code or an account number.



## **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.



## 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.