

# Contacts (Accounts) - Portal Access Logic Correction (20173)

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Previously, when a new contact was added and the account class has **Auto Send Portal Invitation on Contact Creation** was set to Yes, the portal invitation link was sent, but the **Enable Portal Access** checkbox remained unchecked in Add Contact, preventing the contact from accessing their portal account. This has been updated so that when the account class setting is enabled, the **Enable Portal Access** checkbox is automatically checked granting portal access to the customer.

The image shows two overlapping application windows. The top window is titled 'ADD ACCOUNT CLASS' and has a tab navigation bar with 'Details' (selected), 'Customer Portal', 'Payment Processing', 'Status Management', and 'Finance Charges and Other Fees'. The 'Customer Portal' tab is highlighted in blue. The 'Details' tab contains several dropdown fields, one of which is 'ENABLE PORTAL ACCESS' set to 'Yes'. The bottom window is titled 'ADD CONTACT' and has a tab navigation bar with 'Details' (selected), 'Customer Portal Access', 'Tags', and 'Activity History'. The 'Customer Portal Access' tab is highlighted in blue. The 'Details' tab contains fields for 'NAME' (set to 'John Doe'), 'PHONE 1' (set to '(201) 555-0123'), and 'PHONE 2' (set to '(201) 555-0123'). At the bottom of the 'Customer Portal Access' tab, there is a checkbox labeled 'ENABLE PORTAL ACCESS' which is checked. The 'Customer Portal Access' tab is also highlighted in blue.

**Pathway:** Setup > Account > Account Class > Customer Portal [tab] | Customer Service Screen > Add Contact