

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

Last Modified on 01/20/2026 10:44 am PST

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.

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

Yes

ALLOW INVOICE-VERIFIED SELF REGISTRATION

No

ADD CONTACT

Details

Customer Portal Access

Tags

Activity History

TITLE

NAME

John Doe

EMAIL

EMAIL 2

PHONE 1

(201) 555-0123

PHONE 2

(201) 555-0123

PHONE 3

(201) 555-0123

PHONE 4

(201) 555-0123

NOTE

RECEIVE SERVICE NOTIFICATIONS

Yes

SERVICE NOTIFICATION METHOD

REQUEST NOTIFICATION METHOD

None

ENABLE PORTAL ACCESS

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