

18.3.1 Enabling the customer portal for a user

Only the contacts in your vte can be enabled in your customer portal. Inside the single contact card, flag the control box in the PORTAL USER block and enter a support start date and an end date.

When the flag is enabled, the system autonomously sends a message to the address indicated in the email field with the credentials to access your portal. The dates, on the other hand, determine the effective access period you allow your customer.

The screenshot shows a web interface for managing a contact named 'Brown Elizabeth'. The interface includes a search bar at the top, a sidebar with navigation icons, and a main content area. The 'Customer Portal Information' section is highlighted with a red box. It contains fields for 'Portal User' (set to 'yes'), 'Support Start Date' (set to '23-11-2021'), and 'Support End Date' (set to '23-11-2022'). Below this is the 'Address Information' section with fields for mailing and other addresses. A right sidebar shows shortcuts and relations.

Customer Portal Information	
Portal User	Support Start Date
yes	23-11-2021
Support End Date	
23-11-2022	

Address Information	
Mailing Street	Other Street
999 Baker Way	
Mailing PO Box	Other PO Box
Mailing City	Other City
San Jose	
Mailing State	Other State
CA	
Mailing Postal Code	Other Postal Code
99999	

SHORTCUTS

- Talks
- Notes

RELATIONS

- Targets (2)
- Activities (1)
- Invoice (1)
- Purchase Order (1)
- Sales Order (1)
- Potentials
- Trouble Tickets
- Quotes
- Products
- Documents
- Campaigns
- Sms

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