

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 displays a CRM interface for a contact named 'Contact Brown Elizabeth'. The 'Customer Portal Information' section is highlighted with a red border and contains the following data:

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

The 'Address Information' section is located below and includes the following details:

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	

The interface also features a search bar at the top, a navigation sidebar on the left, and a right-hand panel with 'SHORTCUTS' and 'RELATIONS' sections. The 'RELATIONS' section lists various entities with counts: Targets (2), Activities (1), Invoice (1), Purchase Order (1), Sales Order (1), Potentials, Trouble Tickets, Quotes, Products, Documents, Campaigns, and Sms.

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