

# 18.3.1 Enabling the customer portal for a user

Only contacts present in vtenext can be enabled for the Customer Portal. Within the individual contact record, it's necessary to check the checkbox in the PORTAL USER section and input a start support date and an end date.

Upon enabling the checkbox, the system autonomously sends a message to the email address provided in the contact's email field, containing the credentials to access the Customer Portal. The specified dates determine the actual access period.

The screenshot displays the vtenext interface for a contact named Jennifer Davis. The 'Customer Portal Information' section is highlighted with a red border. Below it, the 'Address Information' section is visible. The right sidebar shows a list of shortcuts and relations.

Customer Portal Information	
Portal User	Support Start Date
no	
Support End Date	Profile
	Default

  

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

  

**SHORTCUTS**

- Talks
- Notes

**RELATIONS**

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

Additionally, it will be necessary to choose the Profile that the specific Portal User will have for their usage and viewing. The Profile determines how each portal user sees their data and how they can interact with the available modules.

Search...

Contact Davis Jennifer

admin (Administrator) 31-07-2023 16:49:41

Modified Time 31-07-2023 16:49:41

Creator admin (Administrator)

**Customer Portal Information**

Portal User no

Support End Date

Support Start Date

Profile Default

**Address Information**

Mailing Street 999 Baker Way

Mailing PO Box

Mailing City San Mateo

Mailing State CA

Mailing Postal Code 99999

Other Street

Other PO Box

Other City

Other State

Other Postal Code

Locate Map

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**RELATIONS**

- Sales Order 2
- Potentials
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