

# 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 record. The contact is 'Contact Davis Jennifer'. The 'Customer Portal Information' section is highlighted with a red box. It contains the following fields:

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

Below this section is the 'Address Information' section, which includes fields for Mailing Street, Other Street, Mailing PO Box, Other PO Box, Mailing City, Other City, Mailing State, Other State, Mailing Postal Code, and Other Postal Code. The right sidebar shows 'SHORTCUTS' and 'RELATIONS'.

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.

The screenshot displays the Salesforce Customer Portal for a contact named Jennifer Davis. The interface is divided into several sections:

- Customer Information:** Includes fields for Name (admin (Administrator)), Modified Time (31-07-2023 16:49:41), and Creator (admin (Administrator)).
- Customer Portal Information:** Contains fields for Portal User (no), Support Start Date (31-07-2023 16:49:41), and Support End Date. A red box highlights the 'Profile' field, which is set to 'Default'. A red arrow points to this field.
- Address Information:** Includes fields for 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, and Other Postal Code.

The right sidebar shows 'SHORTCUTS' (Talks, Notes) and 'RELATIONS' (Sales Order, Potentials, Activities, Trouble Tickets, Quotes, Purchase Order, Products, Documents, Campaigns, Invoice, Sms). A 'Locate Map' button is also visible.

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