

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 top navigation bar includes a search field and various utility icons. The contact name "Contact Davis Jennifer" is shown at the top. Below the contact details, the "Customer Portal Information" section is highlighted with a red border. This section contains fields for "Portal User" (set to "no"), "Support Start Date", "Support End Date", "Profile" (set to "Default"), and a "Locate Map" button. To the right, a sidebar lists "SHORTCUTS" and "RELATIONS". The "RELATIONS" list includes "Sales Order" (with a count of 2), "Potentials", "Activities", "Trouble Tickets", "Quotes", "Purchase Order", "Products", "Documents", "Campaigns", "Invoice", and "Sms".

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	

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.

Contact Davis Jennifer

Edit

admin (Administrator)

Modified Time

31-07-2023 16:49:41

31-07-2023 16:49:41

Creator

admin (Administrator)

Customer Portal Information

Portal User

no

Support Start Date

Profile
Default

Support End Date

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

SHORTCUTS

Talks

Notes

RELATIONS

Sales Order

Potentials

Activities

Trouble Tickets

Quotes

Purchase Order

Products

Documents

Campaigns

Invoice

Sms

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