

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 ANDERMANSON PATRICK. The left sidebar contains navigation links: Home, Leads, Accounts, Contacts, Campaigns, Trouble Tickets, Potentials, Reports, Modules, and Settings. The main content area shows the contact's details. At the top, there are fields for 'Lock Automatic Emails' (set to 'no') and 'Receive newsletter' (set to 'yes'). Below these is the 'Business Portal Information' section, which is highlighted with a red box. This section contains a 'Portal User' checkbox (checked), a 'Profile' dropdown (set to 'Default'), a 'Support Start Date' (19-05-2026), and a 'Support End Date' (30-05-2026). Below the portal information is the 'Address Information' section, which includes fields for 'Mailing Street', 'Mailing City', 'Mailing State', 'Mailing Postal Code', and 'Mailing Country'. A 'Locate Map' button is also present. On the right side, there is a 'SHORTCUTS' panel with links to Talks, Notes, and a 'RELATIONS' panel with links to Targets, Campaigns, Potentials, Activities, Trouble Tickets, Quotes, and Purchase Order.

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.

Home

Leads

Accounts

Contacts

Campaigns

Trouble Tickets

Potentials

Reports

Modules

Settings

Search...

Collapse

Search...

Contact ANDERMANSON PATRICK

Edit

Lock Automatic Emails

no

Receive newsletter

yes

Business Portal Information

Portal User

yes

Support Start Date

19-05-2026

Profile

Default

Support End Date

30-05-2026

Address Information

Mailing Street

Mailing City

Mailing State

Mailing Postal Code

Mailing Country

Locate Map

SHORTCUTS

Talks

Notes

RELATIONS

Targets

1

Campaigns

1

Potentials

1

Activities

Trouble Tickets

Quotes

Purchase Order

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