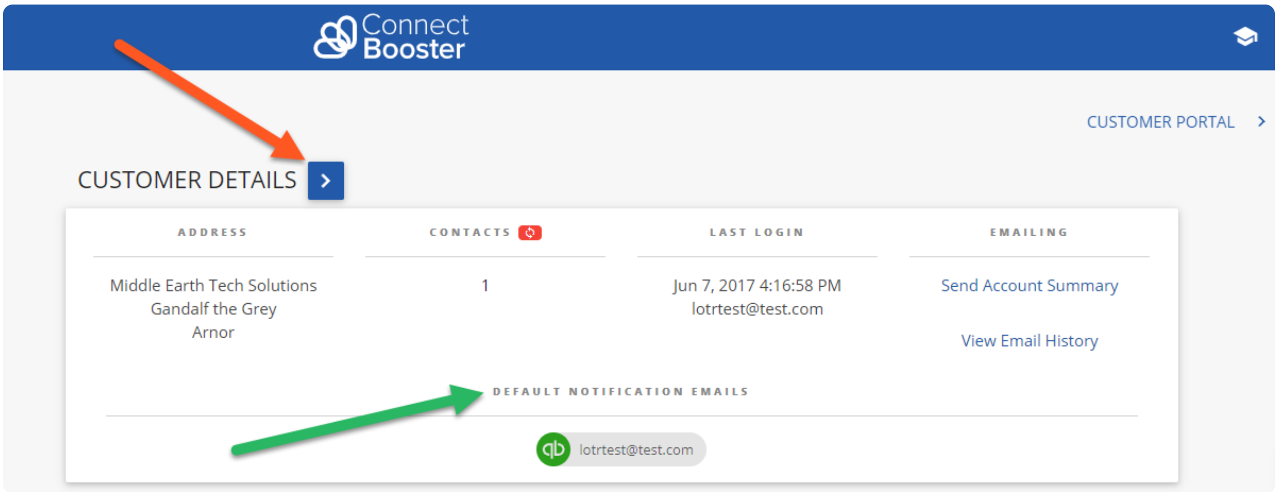
Customer Details

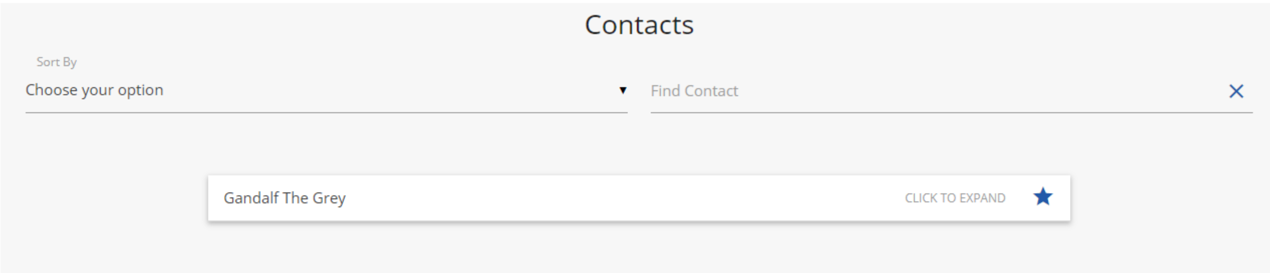
Last Modified on 08/19/2020 10:35 am CDT

Customer Details

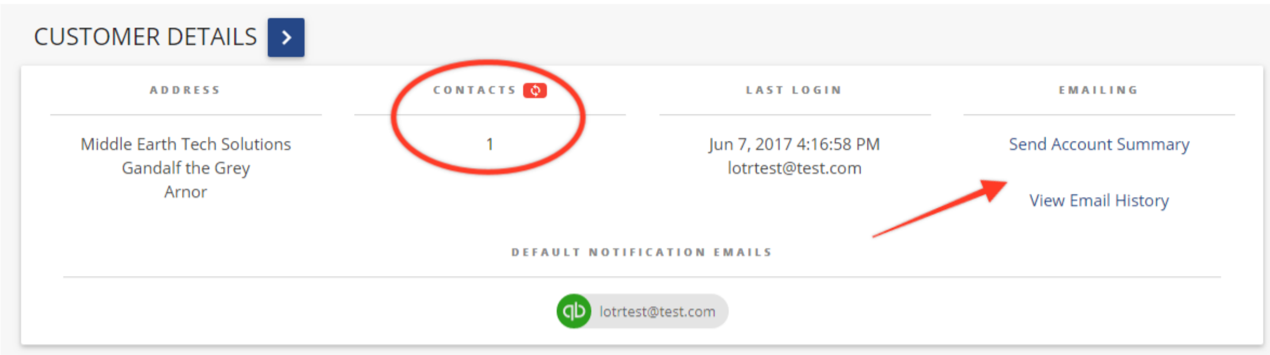
Click on the Customer Details section to see the full list of contacts.



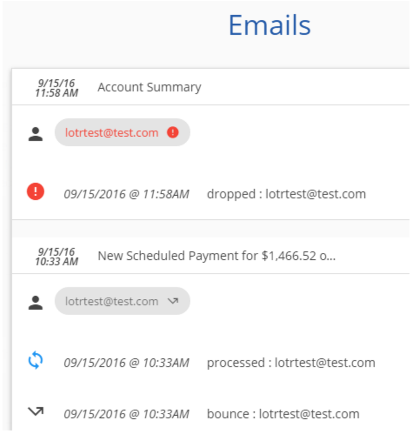
Here you may grant a customer access to the portal, view and individually manage all of a customer's associated contacts.

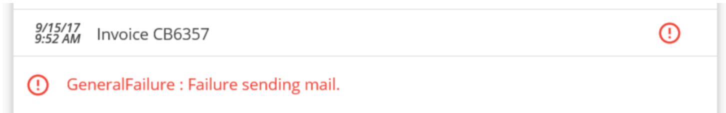


- The "Sort By" and search field will assist when many contacts are listed.



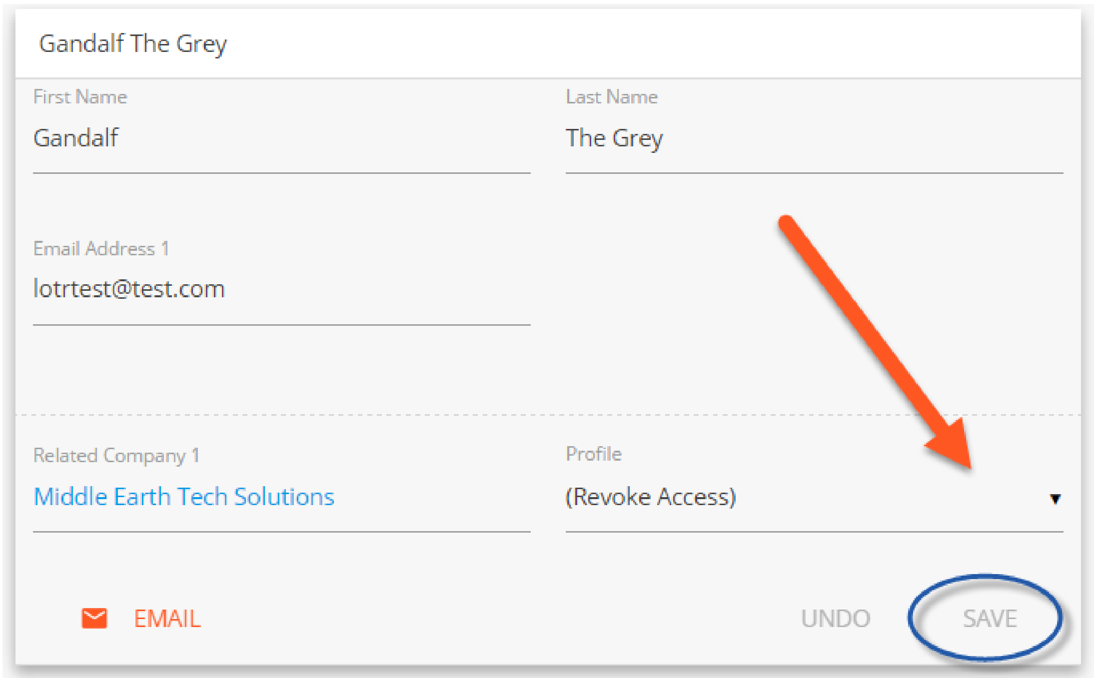
Click on "Send Account Summary" to send an account statement to the default billings contact(s). You can also view the audit trail of emails that have been sent to this customer by clicking "View Email History", along with a description of any errors that may have occurred.





Each contact can have a unique level of access. This will control what a given contact can see and do once logged into the portal.

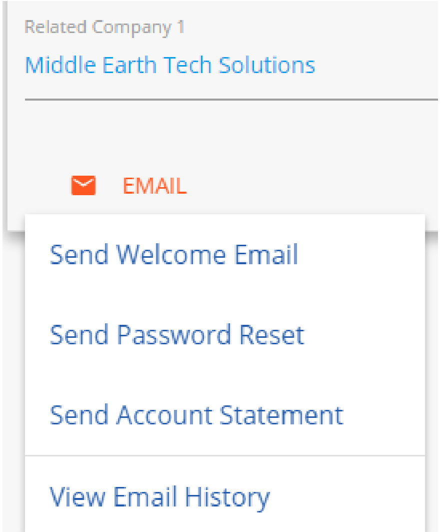
- If a client mentions they can't see any open invoices, make sure their security level is high enough!



In the image example, we clicked on Gandalf to expand the card. Under the "Profile" option we used the drop down to "Revoke Access".

- When making changes, don't forget to "Save"!

Click on "Email" to send a Welcome Email, Password Reset, or Account Statement. You can also view the contact's email history (only pertaining to THIS specific contact).



The various access levels are defined and managed under the main Settings + Configurations + Client Users section. Please refer to other documentation articles for details