

Customer Details

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Customer Details

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

The screenshot shows the 'Connect Booster' interface. At the top, there is a blue header with the logo and a graduation cap icon. Below the header, the text 'CUSTOMER PORTAL >' is visible. The main content area is titled 'CUSTOMER DETAILS >'. It contains a table with four columns: ADDRESS, CONTACTS, LAST LOGIN, and EMAILING. The ADDRESS column lists 'Middle Earth Tech Solutions', 'Gandalf the Grey', and 'Arnor'. The CONTACTS column shows '1'. The LAST LOGIN column shows 'Jun 7, 2017 4:16:58 PM' and 'lotrtest@test.com'. The EMAILING column has links for 'Send Account Summary' and 'View Email History'. Below the table, there is a section for 'DEFAULT NOTIFICATION EMAILS' with a contact card for 'lotrtest@test.com'.

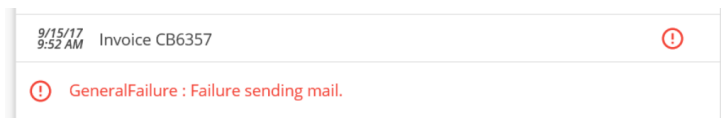
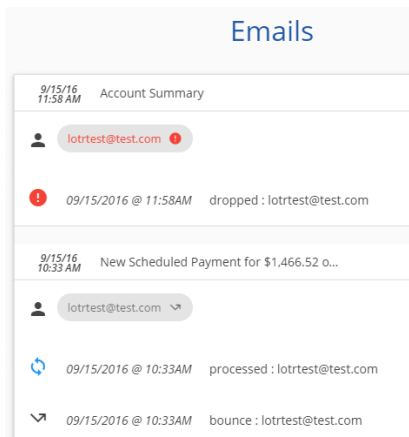
Here you may grant a customer access to the portal, view and individually manage all of a customer's associated contacts.

The screenshot shows the 'Contacts' section. At the top, it says 'Sort By' and 'Choose your option'. There is a search field with 'Find Contact' and a close button. Below the search field, there is a card for 'Gandalf The Grey' with a 'CLICK TO EXPAND' button and a star icon.

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

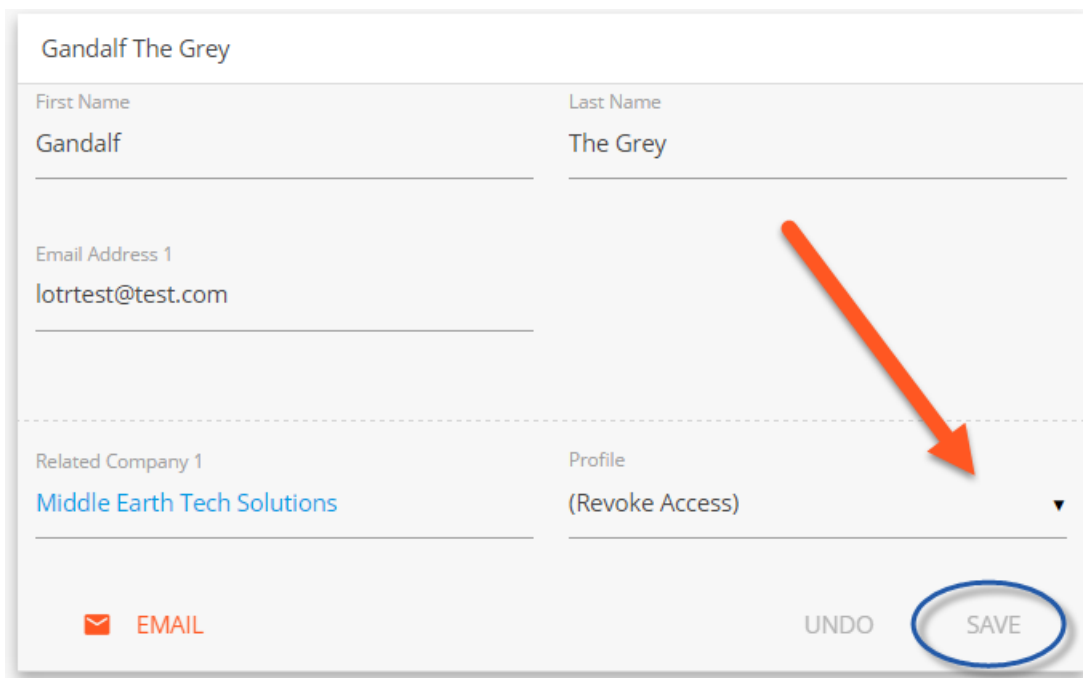
This screenshot is similar to the first one but with annotations. A red circle highlights the 'CONTACTS' column, which shows '1'. A red arrow points to the 'View Email History' link in the EMAILING column.

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).

Related Company 1

Middle Earth Tech Solutions

 EMAIL

Send Welcome Email

Send Password Reset

Send Account Statement

View Email History

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