

Setting up your Customer Portal

To set up your Customer Portal where your customers can view and create Issues; and view Proposals; and view and pay Invoices as well as enter and update their credit card or ACH (e-check) information. You can also set up an email template to send to your customers as well as design how your company's portal appears.

Prerequisites

• Administration access

To set up the Customer Portal, create an email template, and design your Customer Portal, follow these steps:

1. Hover over your name and select Administration

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2. Click on Edit Application Configuration, the pencil

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- 3. Select the Customer Portal tab
- 4. Put a checkmark in the Enable Customer Portal checkbox. Several fields and sections will appear. The instructions below will start from the top to the bottom

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- 5. Type in the domain name that you would like to have in the url. A common example would be your company's name. the url will be your Customer Portal Domain name.propertyserviceportal.com. in the example below, the url for ACME's customers would be acme.propertyservices.com
- 6. Type in a Customer Portal Link Description. This is what the customer sees instead of [Customer Portal Link Description] token when used in the email below
- 7. Type in a welcoming subject for your customer. This email template is used on the Contacts List to send a Customer Portal Invitation. To read that article, click here. NOTE: There are only two tokens that can be used in the Email Subject and Body, Contact Name and Customer Portal Link
- 8. Write the Email Template in the Invitation Email Body. This can always be changed when sending it to your customers

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- 9. The Login Section is what your customer's will see on your login page only. You can insert your logo and the Page Text
- 10. The General section is for every page in your customer portal. The Display Font is the text that the fields will be
- 11. Pick the background color will be on every page. At the very bottom is the preview section where you can view these
- 12. Pick what font the customer should type in on your customer portal
- 13. This is the border inside the webpage. At the very bottom is the preview section where you can view these

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- 14. Find a Logo to put in your Navigation Bar
- 15. Type in a Title for your page if desired
- 16. Pick the Background Color for the Navigation Bar
- 17. Pick the Font Color for the Navigation Bar



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18. Pick the Background Color, the Font Color, and the Font for the Buttons

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- 19. Write a dashboard message, if desired. You can change this whenever you want. Pick the Font and the Font color for the message as well
- 20. Put a checkmark what the customer can be able to view: Invoices, Issues, and Proposals and type how many days the proposals can be viewed
- 21. Press Save. After you save the Customer Portal, your domain will appear on the Customer Portal tab in the Application Configuration



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