

Sending your Customer Contact an Invite to your Customer Portal

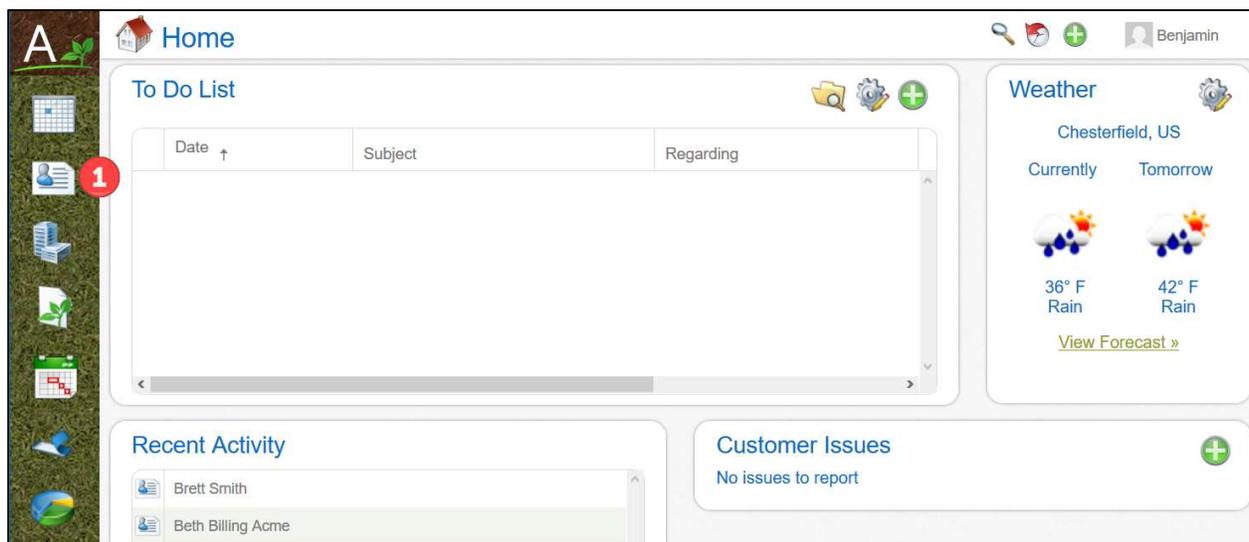
To send your customers an Invite to your Customer Portal the email can be configured on the Customer Portal tab in Application Configuration accessed in Admin.

Prerequisites

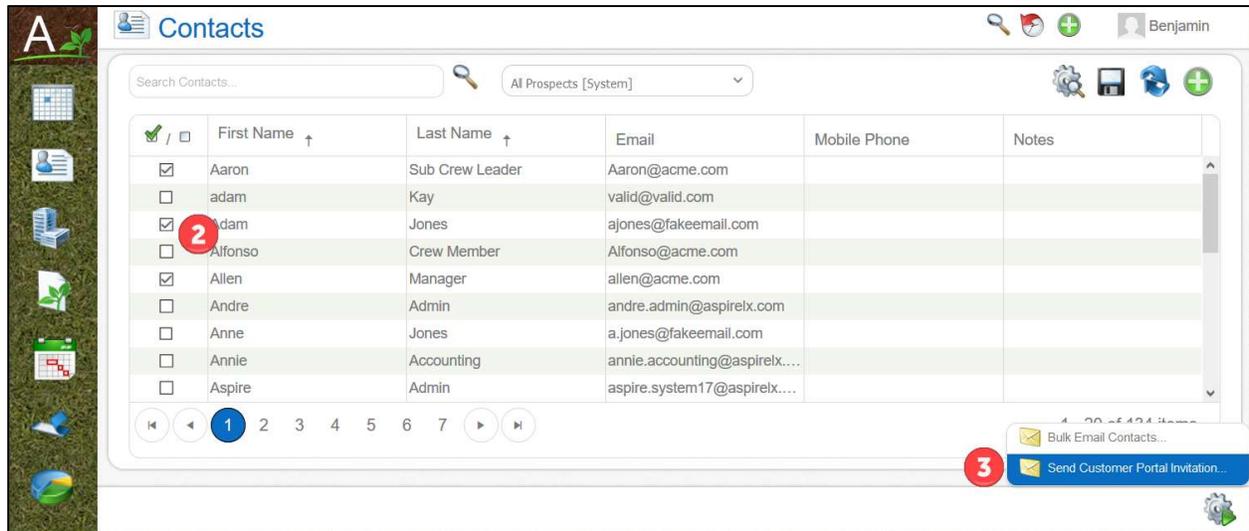
- Customer Portal Enabled
- Bulk Email Contacts and Send Customer Portal Invitation Role Permissions

To be able to send your customers an invite to your customer portal, follow these steps:

1. Select Contacts



2. Put a checkmark in the contacts who need the Portal Invitation
3. Hover over the Bulk Actions Gear and select Send Customer Portal Invitation



Contacts

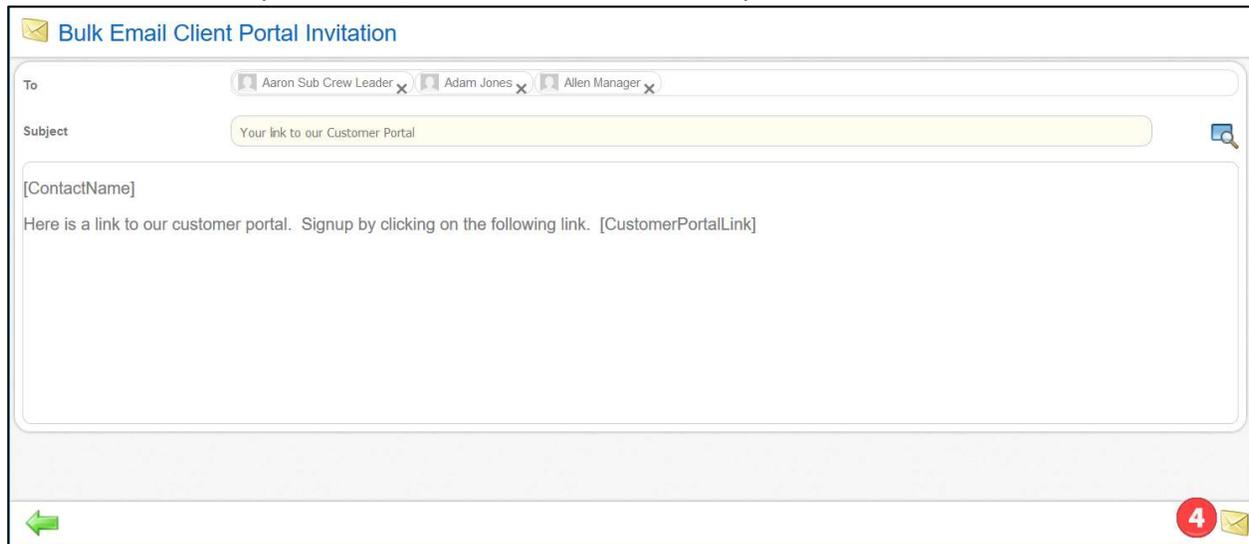
Search Contacts... All Prospects [System]

<input checked="" type="checkbox"/> / <input type="checkbox"/>	First Name ↑	Last Name ↑	Email	Mobile Phone	Notes
<input checked="" type="checkbox"/>	Aaron	Sub Crew Leader	Aaron@acme.com		
<input type="checkbox"/>	adam	Kay	valid@valid.com		
<input checked="" type="checkbox"/>	Adam	Jones	ajones@fakeemail.com		
<input type="checkbox"/>	Alfonso	Crew Member	Alfonso@acme.com		
<input checked="" type="checkbox"/>	Allen	Manager	allen@acme.com		
<input type="checkbox"/>	Andre	Admin	andre.admin@aspirelx.com		
<input type="checkbox"/>	Anne	Jones	a.jones@fakeemail.com		
<input type="checkbox"/>	Annie	Accounting	annie.accounting@aspirelx....		
<input type="checkbox"/>	Aspire	Admin	aspire.system17@aspirelx....		

1 2 3 4 5 6 7

3 Bulk Email Contacts... Send Customer Portal Invitation...

4. Edit the template email, if needed or desired and press the Send Icon



Bulk Email Client Portal Invitation

To:

Subject:

[ContactName]

Here is a link to our customer portal. Signup by clicking on the following link. [CustomerPortalLink]

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