

View of Customer Details

02/13/2024 6:32 pm EST

How to Find Customer Details in CRM Related to the Customer Portal

1. Load the Customer in CRM.
2. Find the person on the customer "All Account Contacts."
3. Click on that person to load their Contact Details.
4. Then drop down the Contact type and select "Portal Contact."
5. Verify that they have a Username and confirmed email under "Web Authentication."
6. If they have Admin access to their company's portal they will have a "Web Role" listed.