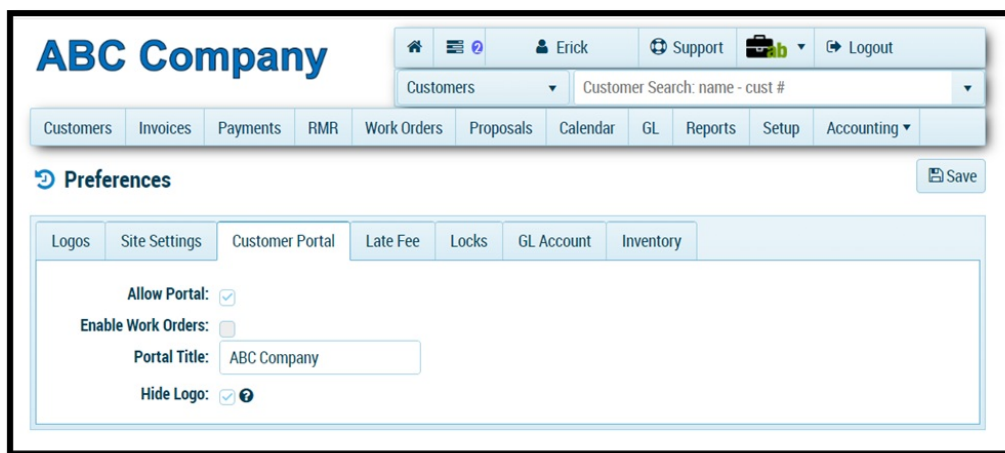


How to Prevent Work Orders from Being Created Through the Customer Portal (AlarmBiller)

06/04/2024 10:15 am EDT

This Dealer disabled the customer portal because they did not want their customers to have the ability to request service from the portal. They did want them to have the ability to pay invoices and add payment methods to their account. Follow these steps below to disable work orders from the customer portal

- 1) Click on the Setup tab up top and then click on Preferences
- 2) Click on the Customer Portal tab, uncheck the Enable Work Orders checkbox and then click Save



The screenshot displays the 'ABC Company' Customer Portal interface. At the top, there is a navigation bar with the company name 'ABC Company' on the left and user information 'Erick' and 'Support' on the right, along with a 'Logout' button. Below this is a search bar labeled 'Customers' with a dropdown menu and a search input field containing 'Customer Search: name - cust #'. A horizontal menu contains various tabs: Customers, Invoices, Payments, RMR, Work Orders, Proposals, Calendar, GL, Reports, Setup, and Accounting. The 'Setup' tab is currently selected. Below the menu, the 'Preferences' section is visible, with a 'Save' button on the right. The 'Customer Portal' sub-tab is active, showing settings for 'Allow Portal' (checked), 'Enable Work Orders' (unchecked), 'Portal Title' (ABC Company), and 'Hide Logo' (checked). The 'Work Orders' tab in the top menu is highlighted, indicating it is the target for disabling.

- 3) Doing so removes the Work Orders tab from the customer portal altogether so the end user will not be able to request service from the customer portal



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Edit

Go Green

Auto Pay

Balance Due: \$551.29
Open Proposals: 16
Auto Pay:
Salesperson: Brad Solomon
My Time Zone: Eastern Standard Time

Invoices

Proposals

Payment History

CC/eChecks

Documents 2

Accounts

Invoices

☐ Show Paid Invoices

Invoice #	Invoice Date	Due Date	Total Amount	Amount Due	
9635	05/23/2023	06/07/2023	\$0.00	\$0.00	
11178	02/01/2024	03/02/2024	\$151.04	\$81.04	\$ Pay It