

How Admins can Create Customer Portal Users

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AlarmBiller provides end users (customers of dealers) the ability to access the customer portal.

What are the necessary permissions for an employee to be able to create user credentials for customers to be able to access the customer portal in AlarmBiller?

The necessary permission to be able to create credentials for the customer portal in AlarmBiller are:

1. Administrator – This user role enables everything access related in AlarmBiller:

Edit User Account Cancel Save

Username:	R	Default Login:	AlarmBiller
First Name:	R	Site Theme:	Blue Opal
Middle Initial:		User Online:	<input type="checkbox"/>
Last Name:	M	Inactive:	<input type="checkbox"/>
Phone:	()	Inactive Date:	
Email:	rc .com	Description:	<input type="text"/>
Time Zone:	(UTC-05:00) Eastern Time (US & Canada)		160 characters remaining
User Role:	Administrator		

1. For users that are not Administrators, the User Administration permission under Miscellaneous needs to be enabled:

User Security Permissions:

Miscellaneous		Payments	
<input type="checkbox"/> Company Setup	Access to all company setup information.	<input type="checkbox"/> View	
<input type="checkbox"/> Supervisor	Ability to see all work orders, proposals, and calendar appointments.	<input type="checkbox"/> Add	
<input type="checkbox"/> User Administration	Manage all users and user roles.	<input type="checkbox"/> Edit	
<input type="checkbox"/> Export	Ability to export data to excel using the 'Export to Excel' button on various grids.	<input type="checkbox"/> Delete	
<input type="checkbox"/> Quick Books	Ability to export/reverse Quickbooks files.	<input type="checkbox"/> Submit	Submit individual CC/eCheck transactions.
<input type="checkbox"/> Deliver All	Ability to Deliver all Invoices and Credits. (Mark All as printed)	<input type="checkbox"/> Submit All	Submit all CC/eCheck transactions.
<input type="checkbox"/> Deliver	Ability to Deliver Individual Invoices and Credits. (Mark All as printed)	<input type="checkbox"/> Refund	
<input type="checkbox"/> Financial	Ability to view Financial Information.	<input type="checkbox"/> Apply	
		<input type="checkbox"/> Unapply	
		<input type="checkbox"/> Deposit	

Note: This permission will allow the user to manage all users and user roles.