

How To Enable Portal Access – Management Level

06/25/2024 8:58 am EDT

***Important:** We can provide Manager access for up to 3 contacts on an account, but they must request it so we have a record that they can see **all cases** for the account and not just their own. *

Step 1 – Find the contact that needs Portal Access enabled through the “Related Contacts” for the company. Click on their name (highlighted in yellow below) to bring up with Contact information page.

Accounts > Custom Security Systems

Related Contacts

18 Items • Sorted by Contact Name • Updated 2 minutes ago

	Contact Name ↑	Account Name	Title	Email	Phone
1	Ashlee Auscoin	Custom Security Sys...	Commercial Service Coordinator	aauscoin@customsec.com	(225) 287-6668
2	Brian Anderson	Custom Security Sys...		banderson@customsec.com	(225) 927-5535
3	Brittany Belle	Custom Security Sys...	Chief Customer Officer	brelle@customsec.com	(225) 927-5535
4	Caitlin Wling	Custom Security Sys...	Residential Service Coordinator	cwing@customsec.com	(225) 330-9433
5	Carrie Adcock	Custom Security Sys...	Manager, Accounts Receivable	cadcock@customsec.com	(225) 927-8171
6	Carrie Azlin	Custom Security Sys...	Assistant Controller	cazlin@customsec.com	(225) 927-5535
7	Christy Mitchell	Custom Security Sys...	Sales Marketing Director	cmitchell@customsec.com	(225) 927-5535
8	Courtney Rushing	Custom Security Sys...	Central Station Manager	crushing@customsec.com	(225) 927-5535
9	Danielle Gordon	Custom Security Sys...	Central Station Assistant Manager	dgordon@customsec.com	(225) 927-6802
10	Jason Scott	Custom Security Sys...	Residential Service Manager	jscott@customsec.com	(225) 315-1290
11	Jeanine Anderson	Custom Security Sys...		janderson@customsec.com	(225) 927-5535
12	Kimberly Loveland	Custom Security Sys...	VP	kloveland@customsec.com	(225) 927-5535
13	Lindsey Duplechien	Custom Security Sys...	Special Projects Director	lduplechien@customsec.com	(225) 927-5535
14	Melissa Richardson	Custom Security Sys...	Manager, Accounts Receivable	mrichardson@customsec.com	
15	Melissa Wilkinson	Custom Security Sys...	Purchasing Manager	mwilkinson@customsec.com	(225) 454-2444
16	Michael Stunkard	Custom Security Sys...	Associate Engineer	mstunkard@geninf.com	225-767-7670
17	Onne Heeren	Custom Security Sys...	President		(225) 927-5535
18	Ronnie Whiddon	Custom Security Sys...	President	rwhiddon@customsec.com	(225) 927-5535

Step 2 – Click “Enable Customer User” at the top right of Contact Information page.

Contact

Ashlee Aucoin

Title: Commercial Service Coordinator
 Account Name: Custom Security Systems
 Phone ID #: (225) 287-6666
 Email: aucoin@customsec.com
 Contact Owner: Steven Coughlin

[A](#) + Follow Edit **Delete** Change System User

Details Related Activity Chatter Demandbase

Name	Ashlee Aucoin	Legacy ID	
Account Name	Custom Security Systems	Contact Owner	Steven Coughlin
Title	Commercial Service Coordinator	Department	
Email	aucoin@customsec.com	Phone	(225) 287-6666
Secondary Email		Mobile	
Email Opt-Out	☐	Other Phone	
CDSR Region		Home Phone	
Primary Contact	☐	Fax	(225) 937-9764
Billing Contact	☐	Contact's Time Zone	
Inactive Contact	☐	Last Source	
Most Recent Campaign Name		Sub Lead Source	
Schedule Demo Call		Contact Type	
Community Member	☐	Reports To	
et landing page first		Stages Notification Preference	
et landing page last			
Care Auto-Response Off	☐		

Address Information

Mailing Address: 650 Oak Villa Blvd.

Step 3 – Change “User License” to read “Customer Community Login” and change “Profile” to read “Bold Customer Community Login Manager”.

! = Required Information

Role: --None-- ⓘ

User License: Customer Community Login

Profile: Bold Customer Community Login Manager ⓘ

Active: ☒

Knowledge User: ☐

Quick Access Menu: ☒

Allow Forecasting: ☐

Phone: (541) 773-3900

Extension:

Fax:

Mobile: Example: +1 5035550123 ⓘ

Email Encoding: General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

Step 4 – Click “Save” at the top of the page to save all changes. Manager level access has now been enabled.

Object Manager | 00114629 | Case

SETUP
Users

New User

User Edit: Save Cancel

General Information

First Name: Ashlee

Middle Name:

Last Name: Aucoin

Suffix:

Alias: aauc

Email: aauc@customsec.com

Username: aauc@customsec.com

Nickname: aauc ⓘ

Title: Commercial Service Coordin

Company:

Department:

User License: Customer Community L

Profile: Bold Customer Commu

Active: ☒

Knowledge User: ☐

Quick Access Menu: ☒

Allow Forecasting: ☐

No MRM Updates: ⓘ

Phone: (225) 287-6668

Extension:

Fax: (225) 927-9764

Mobile:

Email Encoding: General US & Western I

Mailing Address

Street: 690 Oak Villa Blvd.

City: Baton Rouge

State/Province: LA

Zip/Postal Code: 70815-8403

Country: United States

Additional Information

DocuSign Username: