

How To Enable Portal Access – Regular Employee Access

06/25/2024 10:36 am EDT

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 (Reference Photo #2).

| Contact Name | Account Name | Title | Email | Phone |
|----------------------|--------------------------|-----------------------------------|---------------------------|----------------|
| Ashlee Aucoin | Custom Security Syste... | Commercial Service Coordinator | aaucoin@customsec.com | (225) 287-6668 |
| Brian Anderson | Custom Security Syste... | | banderson@customsec.com | (225) 927-5535 |
| Brittany Relle | Custom Security Syste... | Chief Customer Officer | brelle@customsec.com | (225) 927-5535 |
| Caitlin Wing | Custom Security Syste... | Residential Service Coordinator | cwing@customsec.com | (225) 330-9433 |
| Carrie Adcock | Custom Security Syste... | Manager, Accounts Receivable | cadcock@customsec.com | (225) 927-8171 |
| Carrie Azlin | Custom Security Syste... | Assistant Controller | cazlin@customsec.com | (225) 927-5535 |
| Christy Mitchell | Custom Security Syste... | Sales Marketing Director | cmitchell@customsec.com | (225) 927-5535 |
| Courtney Rushing | Custom Security Syste... | Central Station Manager | crushing@customsec.com | (225) 927-5535 |
| Danielle Gordon | Custom Security Syste... | Central Station Assistant Manager | dgordon@customsec.com | (225) 927-6802 |
| Jason Scott | Custom Security Syste... | Residential Service Manager | jscott@customsec.com | (225) 315-1290 |
| Jeanine Anderson | Custom Security Syste... | | janderson@customsec.com | (225) 927-5535 |
| Kimberly Loveland | Custom Security Syste... | VP | kloveland@customsec.com | (225) 927-5535 |
| Lindsey Duplechien | Custom Security Syste... | Special Projects Director | lduplechien@customsec.com | (225) 927-5535 |
| Melissa Richardson | Custom Security Syste... | Manager, Accounts Receivable | mrichardson@customsec.com | |
| Melissa Wilkinson | Custom Security Syste... | Purchasing Manager | mwilkinson@customsec.com | (225) 454-2444 |
| Michael Stunkard | Custom Security Syste... | Associate Engineer | mstunkard@geninf.com | 225-767-7670 |
| Orne Heeren | Custom Security Syste... | President | | (225) 927-5535 |
| Ronnie Whiddon | Custom Security Syste... | President | rwhiddon@customsec.com | (225) 927-5535 |

Contact: Ashlee Aucoin

Account Name: Custom Security Systems | Phone: (225) 287-6668 | Email: aaucoin@customsec.com | Contact Owner: Steven Coughlin

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: aaucoin@customsec.com | Phone: (225) 287-6668 |
| Secondary Email | Mobile |
| Email Opt Out | Other Phone |
| GDPR Region | Home Phone: (225) 927-9794 |
| Primary Contact | Contact's Time Zone |
| Billing Contact | Lead Source |
| Inactive Contact | Sub Lead Source |
| Most Recent Campaign Name | Contact Type |
| Schedule Service Call | Agency To |
| Community Member | Steps Notification Preference |
| ed landing page first | |
| ed landing page last | |
| Case Auto-Response Off | |

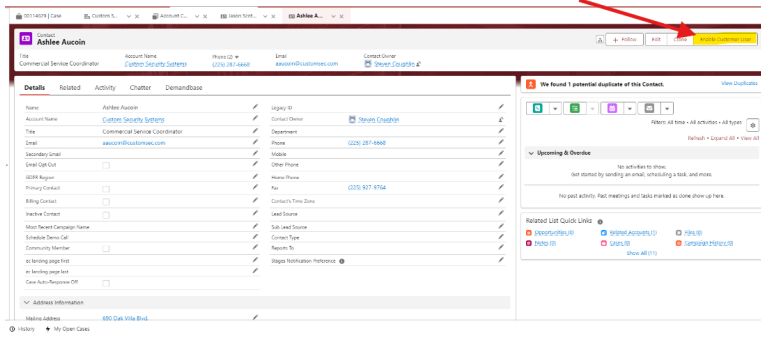
Address Information: Mailing Address: 690 Oak Villa Blvd.

Upcoming & Overdue: No activities to show. Get started by sending an email, scheduling a task, and more. No past activity. Past meetings and tasks marked as done show up here.

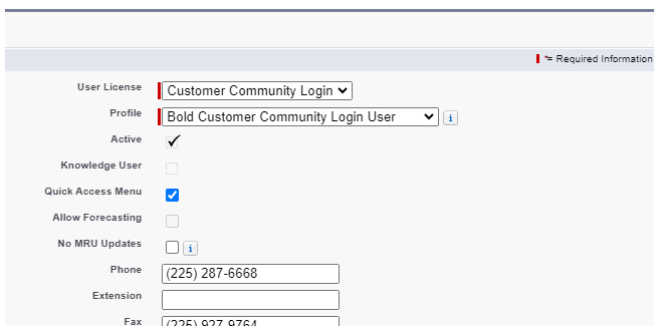
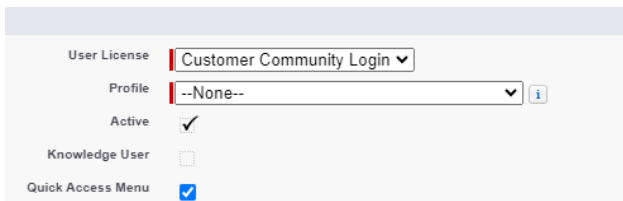
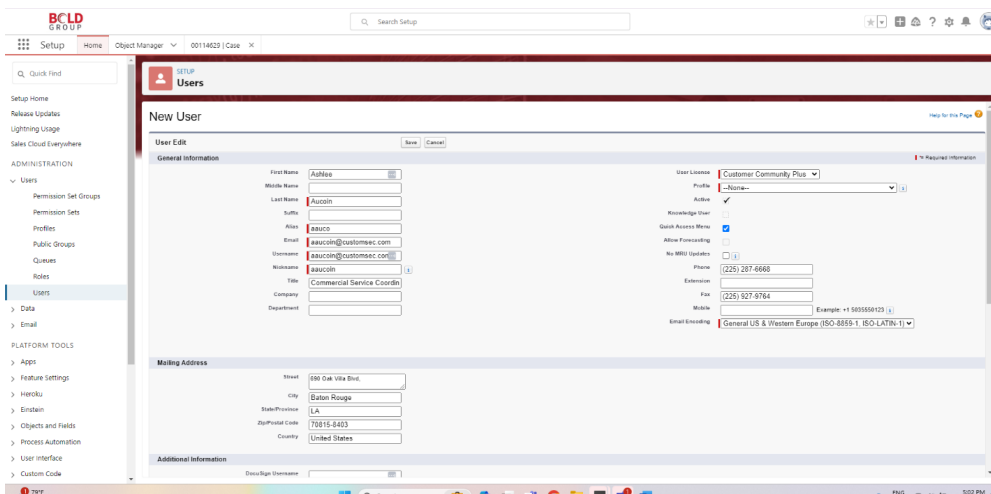
Related List Quick Links: Opportunities (5), Related Accounts (1), Files (0), Notes (0), Cases (0), Campaign History (0). Show All (1)

Enable Customer User button in top right corner.

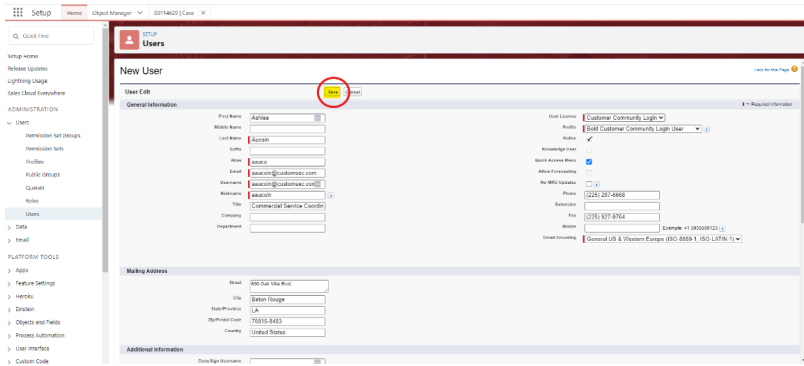
Step 2 – Click “Enable Customer User” in the top right hand corner of the page.



Step 3 – That will bring you to this page, where you will click the “User License” drop down menu and select “Customer Community Login”. You also will need to change the “Profile” to read “Bold Customer Community Login User”



Step 4- Click “Save” to ensure all changes you have made for the user are submitted.



Once you have saved the changes, the page will automatically refresh and bring up a new page that will look like this one. Portal Access has now been saved for this customer and all changes were successful.