Inviting a Customer to the Customer Portal

Use a portal invitation so an existing customer can sign in to view invoices, statements, and plans, make payments, and request deliveries or tune-ups.

Steps

1. Search for and open the correct customer account.
2. Find the **Portal Invitation** panel on the customer record. It shows the email the invitation will go to and whether the customer has been invited or already has an account.
3. Confirm the email address with the customer.
4. Select **Invite to Portal**. Use **Resend invitation** if the customer cannot find the email.

> **Inviting many customers:** Use **Reports > Portal**, select the eligible customers, and send the invitations in one pass. Each row shows its own result. This requires the portal-management permission. If a customer cannot be invited, the panel says why.

Common Portal Questions

- Customers can log in regardless of how their email was capitalized.
- A wrong password shows "Invalid email or password." Customers can reset it from the login page.
- Paying the full balance in the portal takes any prompt-pay discount still inside its deadline.
- Customers can sign budget, fuel contract, and agreement proposals in the portal. Attaching an autopay card when signing is optional.

For what customers see once they sign in, see Customer Portal.

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