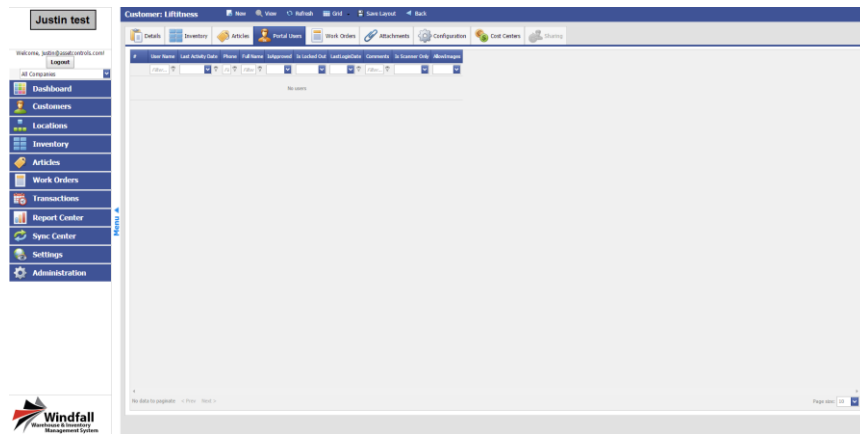


## Portal Users

- In order for customers to view their inventory online, portal users must be set up in Windfall.
- The customer will use the same web address the warehouse uses to access their inventory.
- The customer portal user will only have the ability to view inventory, view articles, view attachments, and create work orders

## Creating Portal Users

- Click on the Portal User tab within the customer.
- Click New to add a new user.



- In the Details box create a username for the user. The username must be a valid email address.
- Enter the user's first and last name.
- Create a password for the user. It must be at least seven characters.
  - Suggestion: Put the password in the Comments section for an easy way to reference the user's password in case they ever forget their password.

Details

User Name / Email  
  
*Your username is your email address.*

Password  Confirm Password   
*Passwords must be 7 to 25 characters long.*

First Name  Last Name

Comments

## Shipping Address

- This is where the users shipping address information will be entered.
- When the user creates a work order, the user can select the shipping address without having to type it in every time a work order is created.

Shipping

Company Name

Address

City  State  Country  Postal Code

## Settings

- The customer name will already be chosen, if the user needs to be associated with any other customers, you can select those customers as well.
- Check the box next to “Can Create Work Orders” if the user needs the capability to create work orders.
- Check “Can Approve Work Orders” if the user can approve work orders created.
- Check “Can User View Images” if user can view inventory images.
- Check “Can User View Inventory Locations” if you want to allow the user to see the warehouse location for inventory items.
- If you are creating a portal user which needs work orders to be approved, select a Work Order Approver from the drop down box
- A cost center code can be entered in the field if you only want to allow the Portal User to view inventory associated to specific cost centers.
- Check the “Attach Work Order Spreadsheet to Email” if you want a spreadsheet emailed when a work order is created.
- If you would like to send email notifications when the Portal User creates a work order, enter the email addresses of the parties in the “Portal Email Addresses” box.

Settings

Customer Name	Use
<input type="text" value="Filter..."/>	<input type="text" value="Filter..."/>
Litiness	<input checked="" type="checkbox"/>
Dragon's R Us	<input type="checkbox"/>
abc company	<input type="checkbox"/>
ABC Company	<input type="checkbox"/>

Cost Center Codes  
No Cost Centers

Attach Work Order Spreadsheet to Email

Portal Email Addresses

Can Create Work Orders  
 Can Approve Work Orders  
 Can User View Images?  
 Can User View Inventory Locations?  
 Work Order Approver: