



- 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.

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Windfall Warehouse & Inventory Blanagement System		

- 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.

Your username is your er	nail address.
Password	Confirm Password
Passwords must be 7 to 2	25 characters long
First Name	Last Name
Comments	

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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	Can Create Work Orders				
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