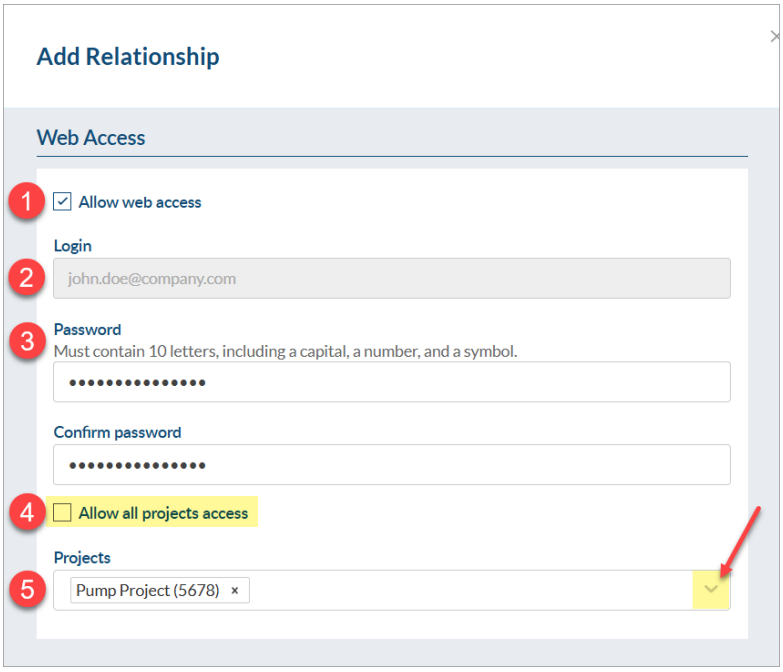
Enable Customer Portal Access

09/28/2026 9:42 am MDT

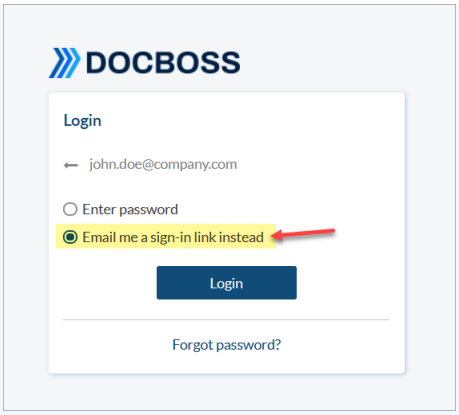
The customer portal provides a secure location for your customers to upload (and download) documents directly into your DocBoss projects.

Customer web access is provided to contacts associated with the company. Before enabling customer web access, follow the instructions in this article to add contacts: Adding contacts. Once a contact is added/selected, fill in the web access-related fields:

1. **Allow web access:** Enables access to the the customer portal .
2. **Login (*for the web access*)**: Automatically generated with the email of the contact.
3. **Password (*for the web access*)**: Password to be set for the login.
4. **Allow all projects access**: Enable if the contact should be granted access ALL projects (*where the company is listed as the customer*).
5. **Projects**: Choose specific projects that the contact should have access to.

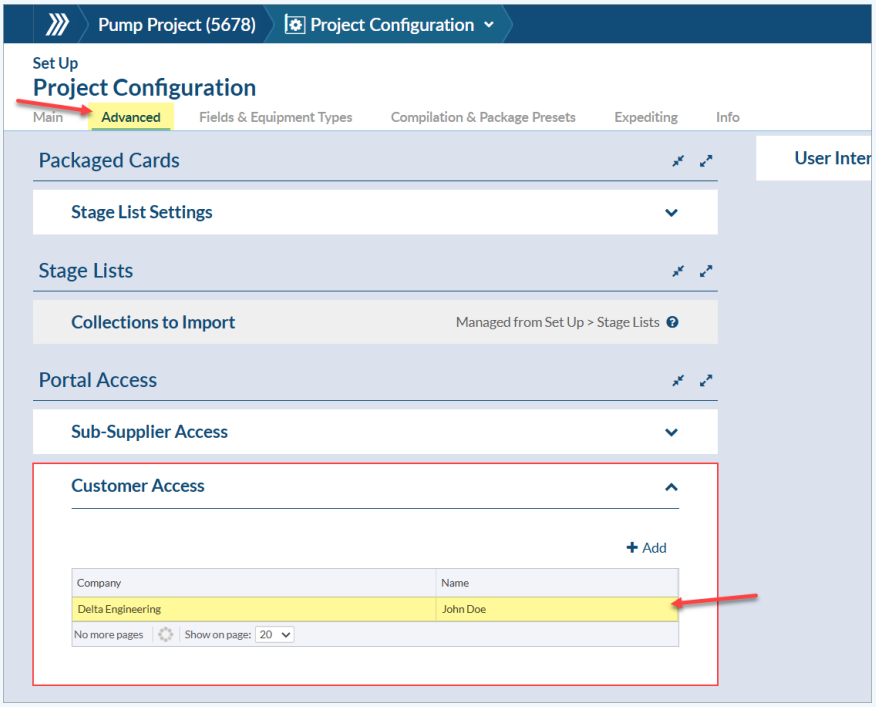


Note: Though a customer portal account must be set up with a password, the user can choose to log in using an email sign-in link instead of using the password associated with their account.



Once the contact is saved, the login credentials (login and password) should be provided to them.

Note: To confirm that a particular contact has access to the project through the portal, navigate to **Project Menu > Set Up > Project Configuration > Advanced**. From the "Customer Access" section, a list of contacts with access will be displayed.



Submittals to customer

When sending submittals TO customers, the documents will be automatically placed in the customers portal.

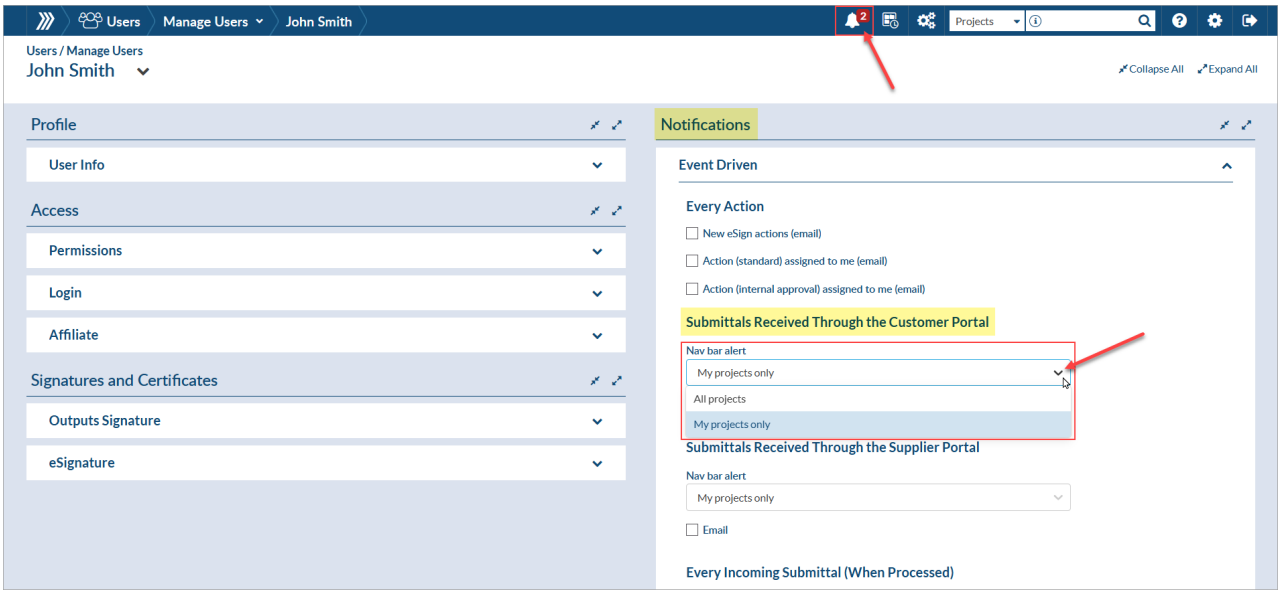
To see how customers view submittals in the portal, see this article: Customer Portal (Customer View).

Note: Email notifications will only be sent to the customer if the option is selected on submittal (see article: Options for outgoing (submittal) notification emails).

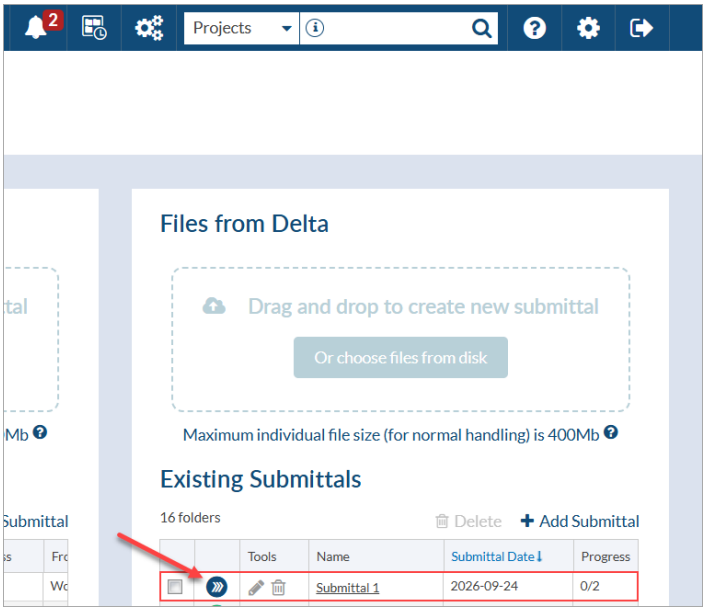
Customer submittal notification

Users can specify how they would like to be notified about customer submittals. For the navigation bar (bell icon), notifications can either be received for all projects, or only the projects they're assigned to. There is also the (optional) option to receive an email notification when a portal submittal is received.

To update this setting, navigate to **System Menu > Users > Manage Users**. Click the pencil icon (under "Tools") for the user profile in question. In the "Notifications" section, modify the customer portal notification settings to the users' preference.



The navigation bar notification will redirect the user to the **Project List** where a list of projects with unprocessed submittals will be displayed. Once the appropriate project is selected, navigate to **Project Menu > Cards In/Out > Incoming Documents** to see the submittal listed in the "Files from [*Customer*]" grid.



Customer portal security

Contacts with customer web access/portal access, like DocBoss user accounts, can have multi-factor

authentication (MFA) enabled for additional security. For instructions on enabling MFA for the customer portal, see this article: Multi Factor Authentication (MFA) for Users.

Visibility

Before a project will display in the customer portal, the project must **not** be hidden OR completed.

Hidden?	Completed?	Visible from the portal?
No	No	Yes
Yes	No	No
No	Yes	No
Yes	Yes	No