

# Enable Customer Portal Access

04/25/2025 11:11 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 Customer Web Access/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.

The screenshot shows the 'Add Relationship' form in the DocBoss system. The form is overlaid on a 'Relationships' list table. Red numbered circles 1 through 5 highlight specific fields: 1. 'Allow web access' checkbox, 2. 'Login' text field, 3. 'Password' text field, 4. 'Allow all projects access' checkbox, and 5. 'Projects' dropdown menu. The 'Projects' dropdown is open, showing a list of projects: 'E-houses (Major Tags) (4533AM)', 'Pump Project (1234)', and 'Valve Project (0005678)'.

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

## 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](#)).*

# Submittal notification from customer

DocBoss users will receive a notification in their system (displayed as a red bell) when a submittal has been made by a customer. The red bell will redirect the user to the Project List and 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.

The screenshot shows the DocBoss user interface. At the top, a dark blue navigation bar contains a red notification bell icon with the number '2' next to it. A red arrow points from the bell icon to the 'Files from Customer' section. Below the navigation bar, the 'Files from Customer' section is visible, featuring a dashed box for creating new submittals and a table of existing submittals. The table has columns for Name, Submittal Date, Progress, and Tools. The third row of the table is highlighted in yellow and contains the submittal 'T-001R' with a progress of '27/27'. A red arrow points from the highlighted row to the 'Add Submittal' button in the left sidebar.

Files from Customer

Drag and drop to create new submittal

Or choose files from disk

Maximum individual file size (for normal handling) is 400Mb

Existing Submittals

5 folders

	Name	Submittal Date	Progress	Tools
✓	2021-06-15 094751	2021-06-15	2/2	
✓	Sub 001	2022-03-16	2/2	
🔄	T-001R	2021-04-12	27/27	

No more pages | Show on Page: 20

## 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](#).