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:

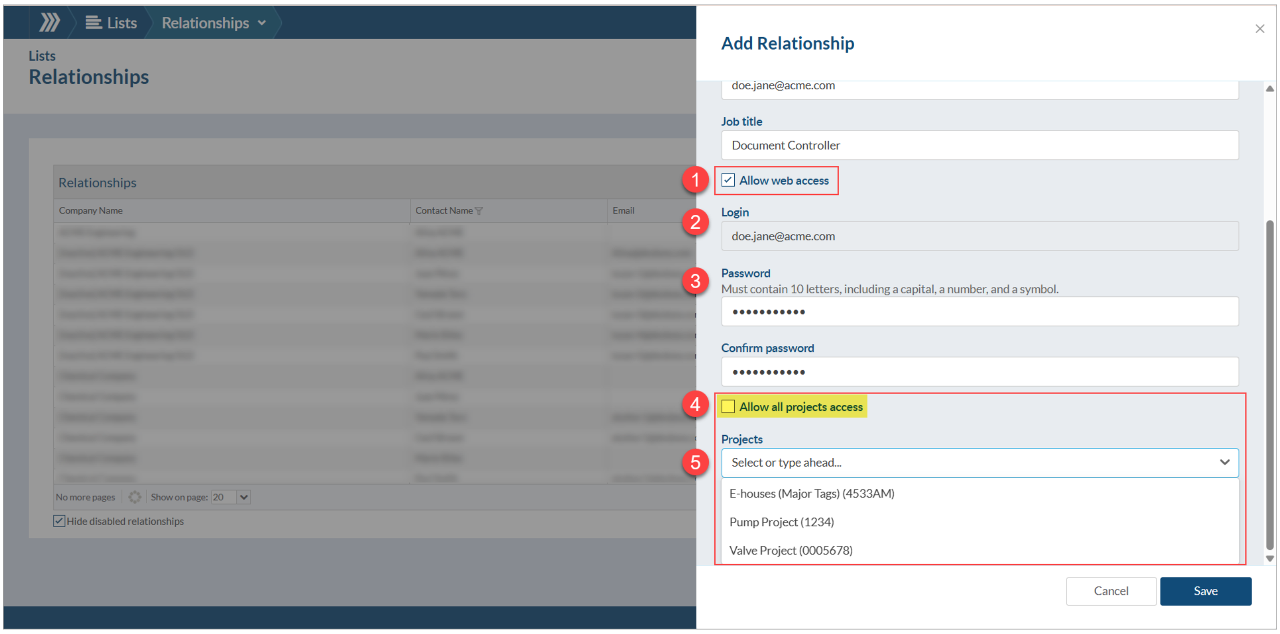
1. **Allow web access:** Enables access to the Customer Web Access/Portal .

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.



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.

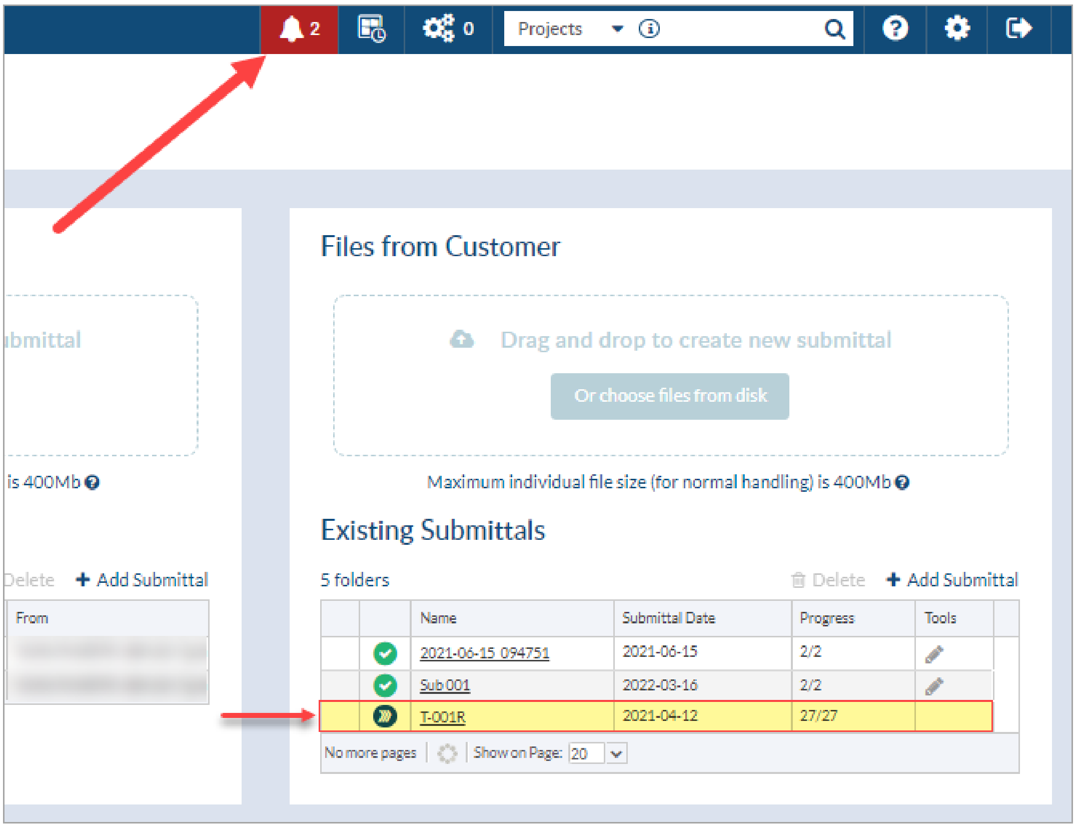
To see how customers view submittals in the portal, see this article: Customer Portal (Customer View).

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.



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.