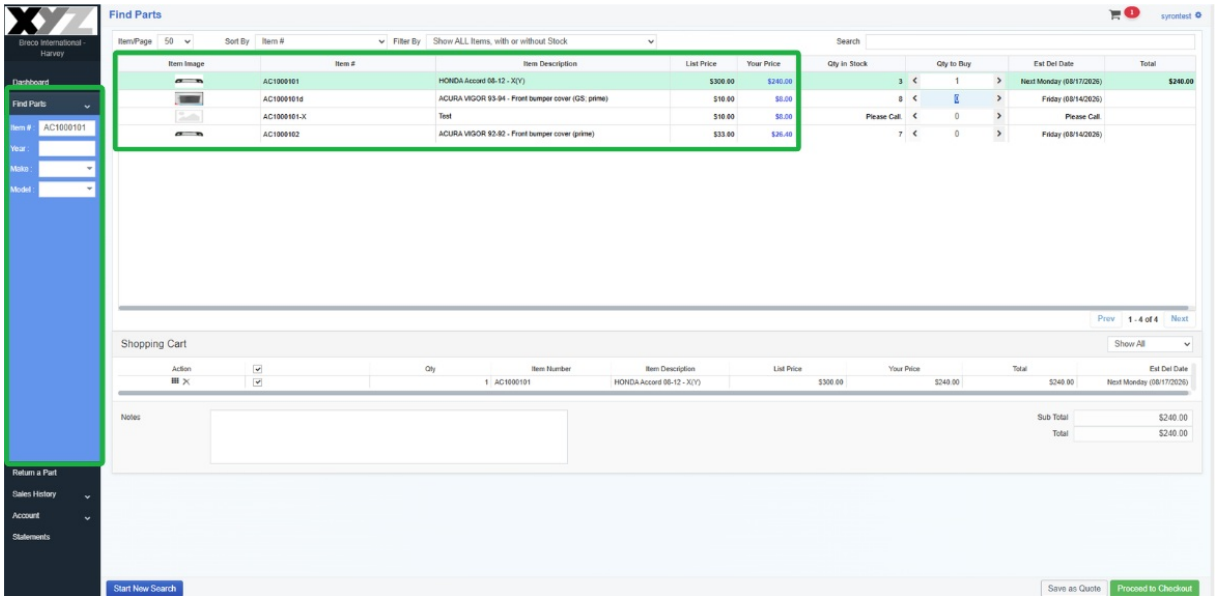
Customer Portal - How To's

Last Modified on 10/23/2026 4:39 pm EDT

The Customer Portal gives your customers 24/7 access to everything they need—from searching parts and placing orders to managing invoices and support requests. Here's what they can do in the portal:

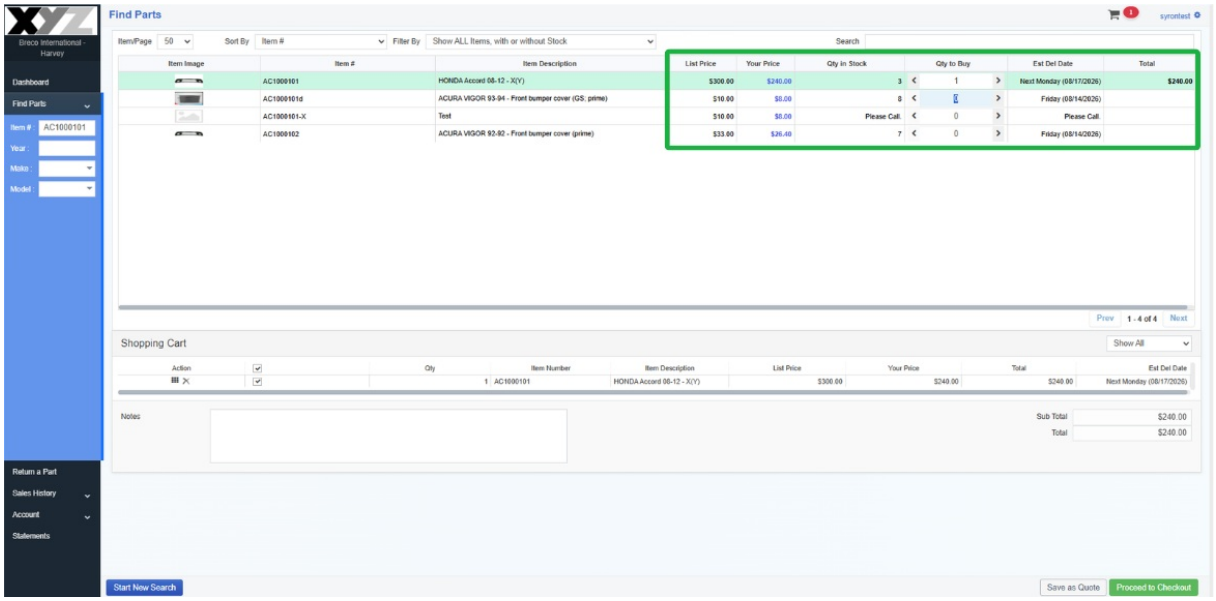
Search for Parts

- Customers can search your inventory using part numbers or keywords.
- View part details, including:
  - List Price
  - Your Price – automatically reflects their unique pricing settings.
-



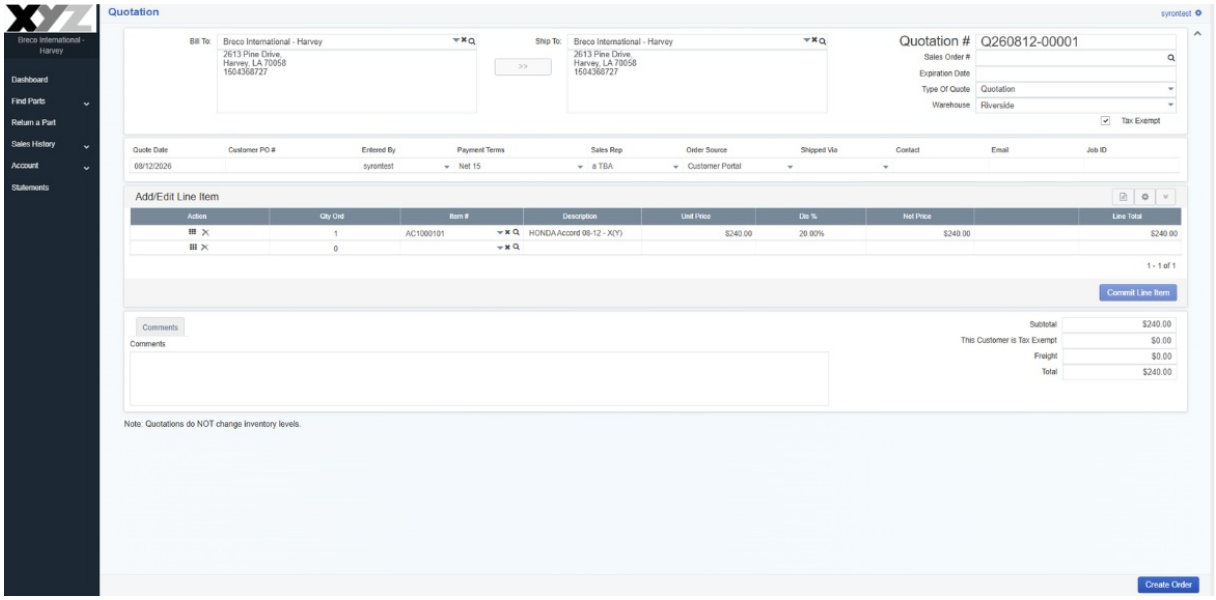
Check Stock & Pricing

- See real-time stock availability.
- View both retail and customer-specific pricing for all parts.



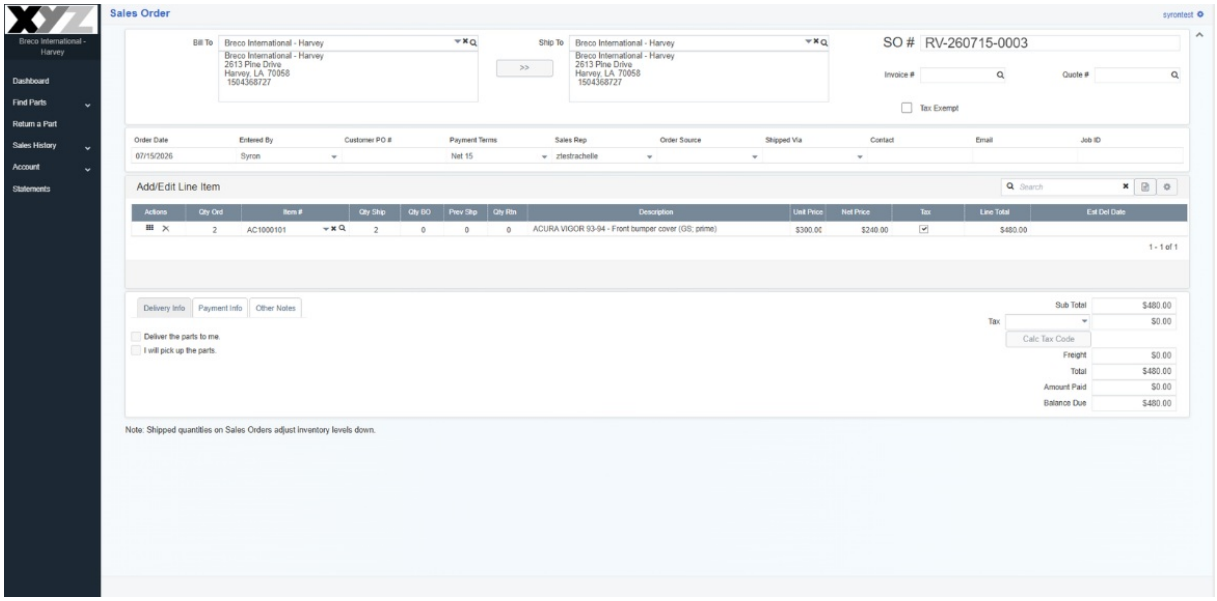
Save & Convert Quotes

- Save Quotes for future use.
- Convert Quotes to Sales Orders with a single click.



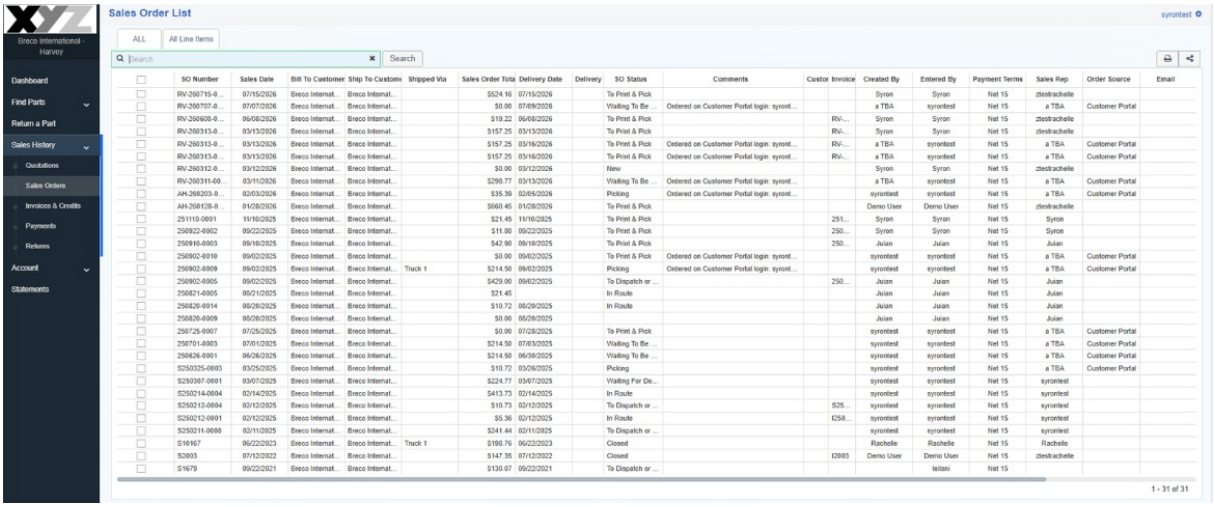
Place Orders

- Submit orders directly through the portal.
- All orders instantly appear in 1place for internal processing.



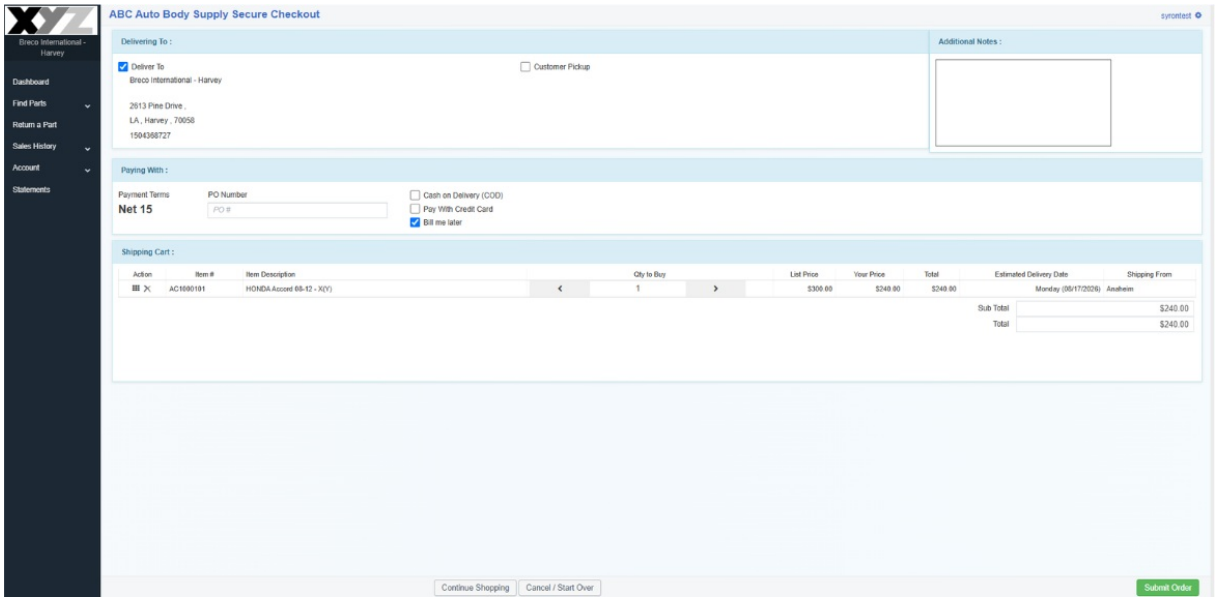
Track Order Status

- View current status of submitted orders.
- Filter and search through past Sales Orders easily.



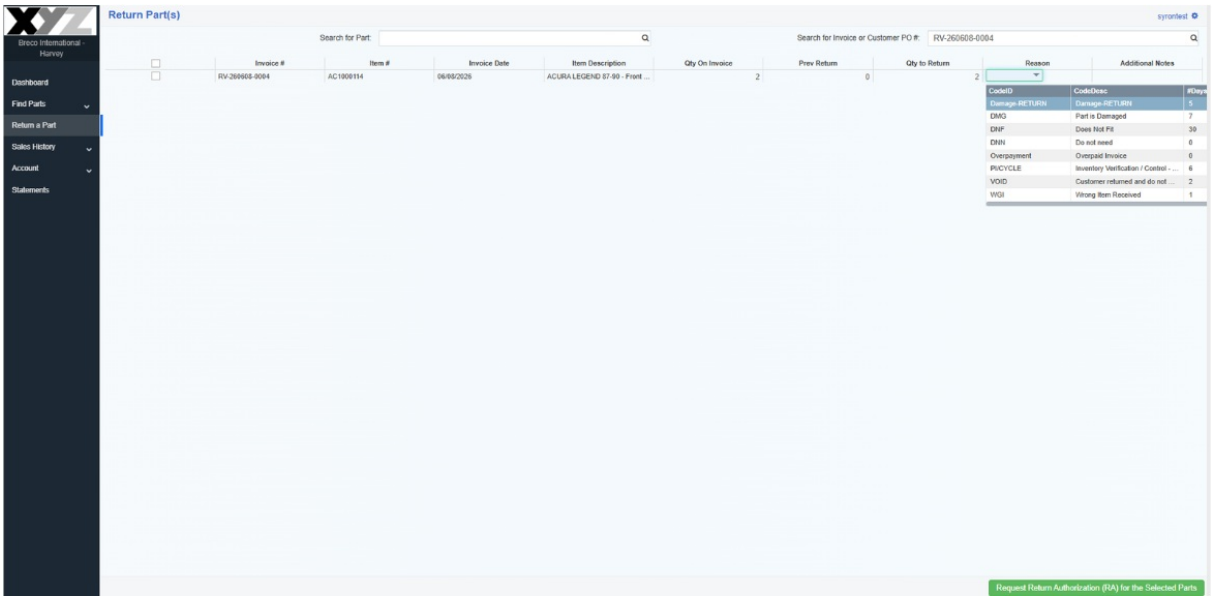
Make Invoice Payments

- Securely view and pay invoices online.
- Payments sync directly with your system for easy tracking.



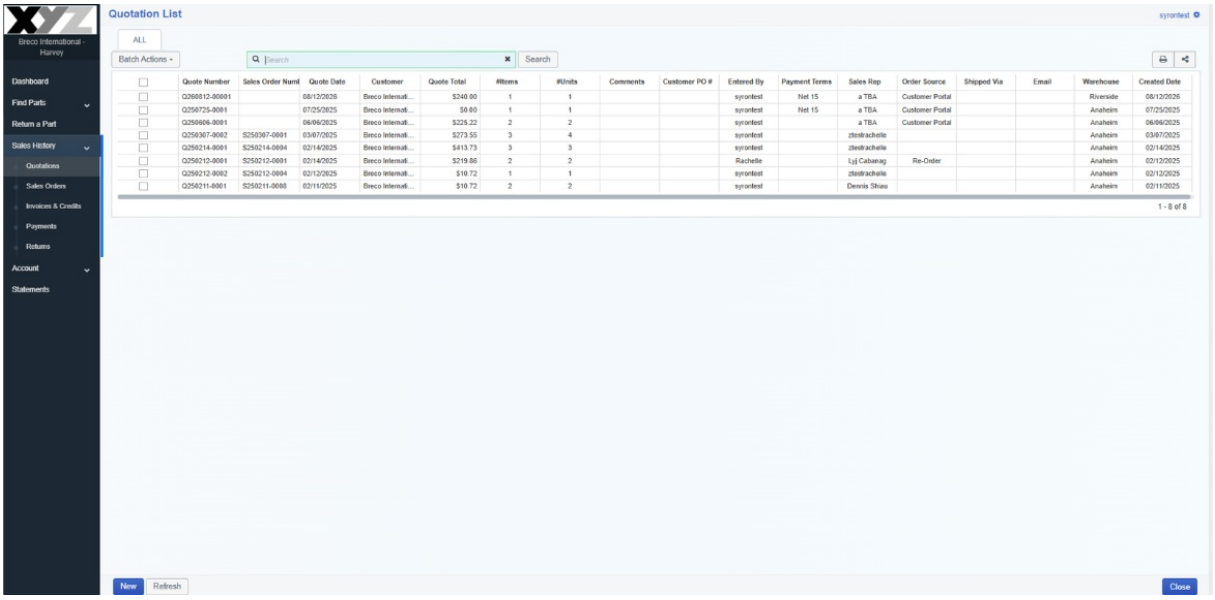
Request Part Returns

- Submit return requests with reason and quantity.
- Return requests are logged and reviewable in 1place.



View Quotes, Orders, Invoices & More

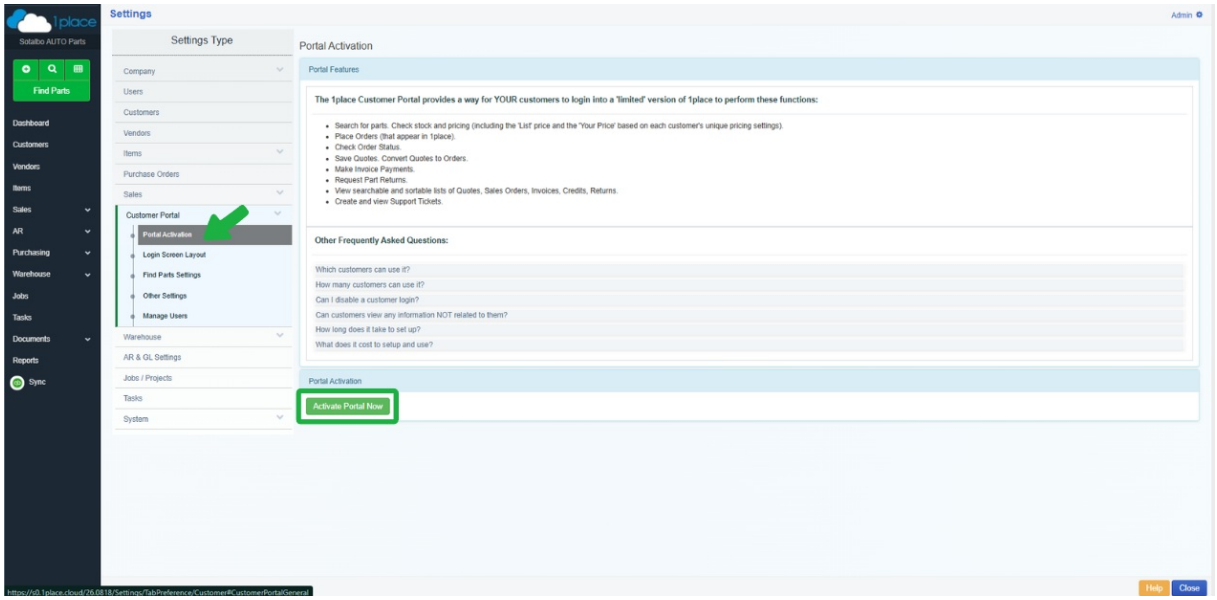
- Full visibility into:
  - Quotes
  - Sales Orders
  - Invoices
  - Credits
  - Returns
- All lists are searchable and sortable for quick access.



Create & Track Support Tickets

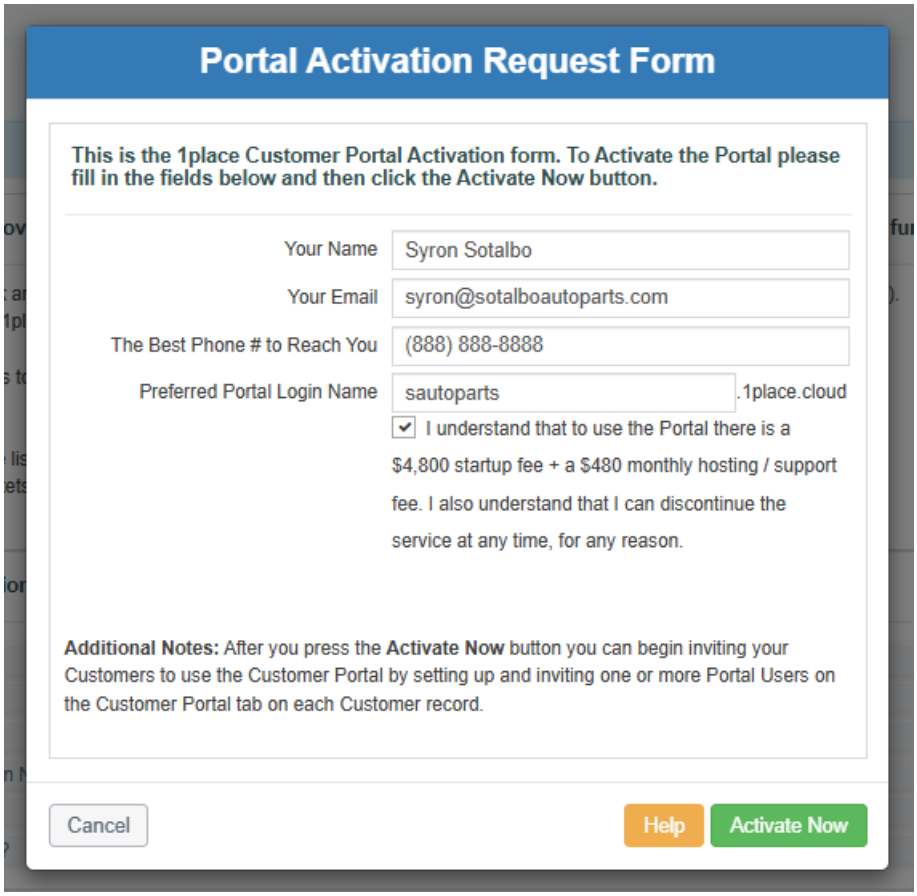
- Submit support tickets right from the portal.
- View ticket status and responses in real time.

- In the **dashboard**, click the **gear icon** beside your name located at the top right corner of the screen.
- Click **Settings**;
- In the Settings screen, click '**Customer Portal**' under the '**Setting Type**' list.
- Once clicked, the 'Customer Portal' field will expand and give you a list of modules to set. Click '**Portal Activation**';



- Once clicked, it will show you the 'Portal Activation' screen that has the Portal Features and other FAQ. Click the '**Activate Portal Now**' button.

- Enter the necessary information needed in the **'Portal Activation Request Form'**. Once everything is filled in and checked the check box, click '**Activate Now**'.



- Once done, you will now see the **'Customer Portal' tab** in your **Customer Detail screen**.

How to Access Login Screen Layout

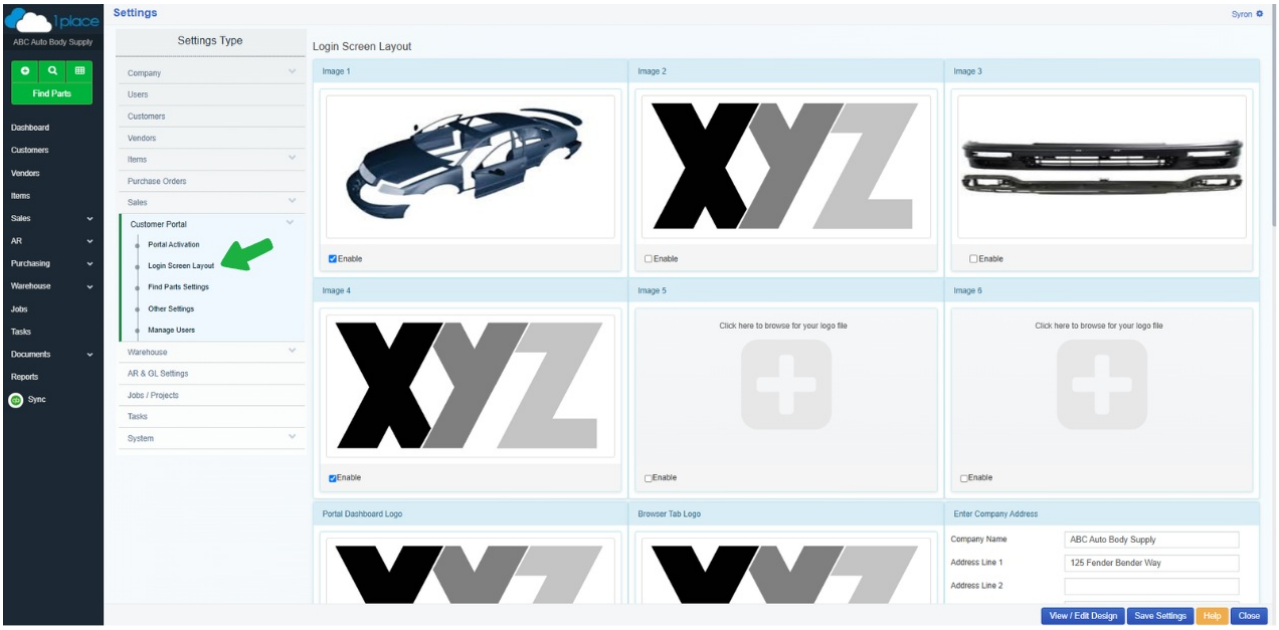
In **1place**, click the **gear icon** beside your name located at the top-right corner of the screen.

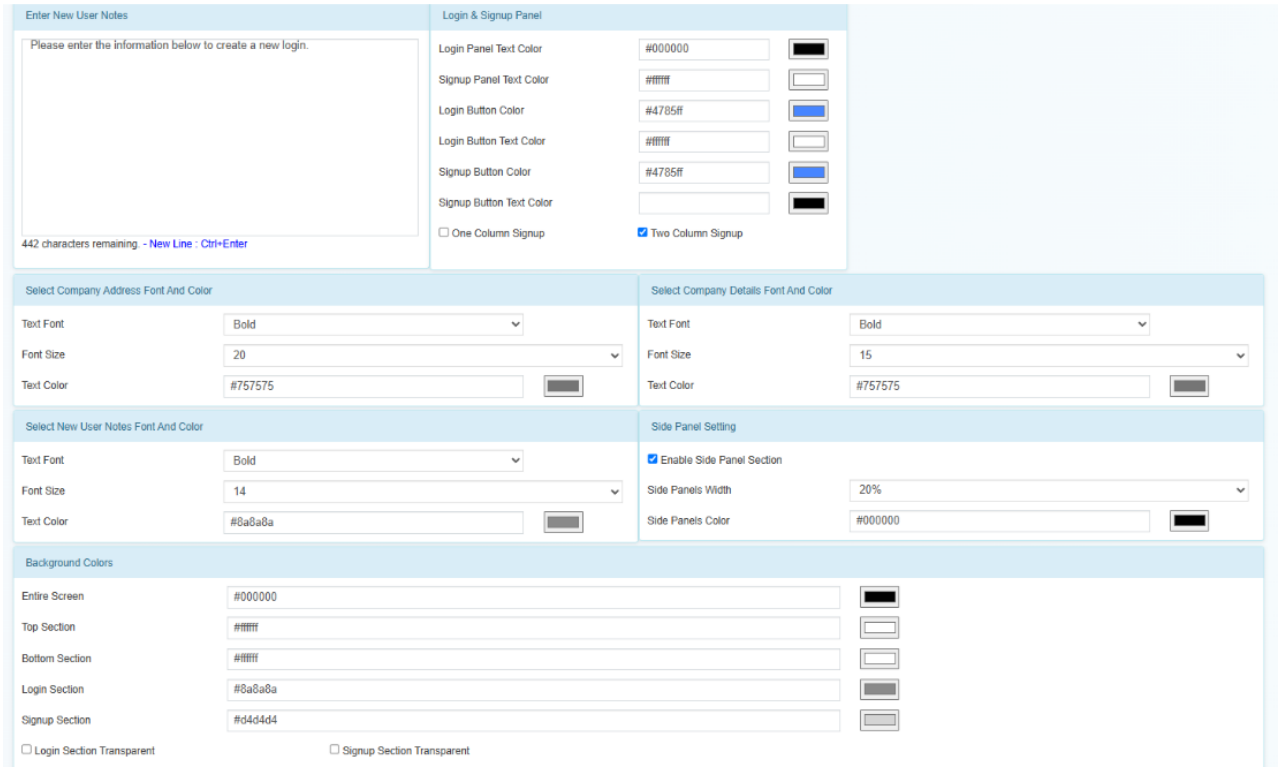
Click **Settings**.

In the **Settings** screen, select **Customer Portal** under the Setting Type list.

Click **Customer Portal** to expand the available settings.

Click **Login Screen Layout**.





The 1place Customer Portal can be customized to reflect your company's branding and message. You can personalize the customer portal login page to create a more branded and welcoming experience for your customers.

1. Upload Logos

- Upload your company logo to appear on the login screen.
- Optionally, upload a secondary logo (e.g., for a parent brand or division).

2. Enter Company Details

- Add your company name, phone number, or any other contact information to be displayed on the login page.

3. Add a Custom Note

- Include a welcome message, helpful instructions, or an onboarding note for new users.

4. Modify Login and Sign-Up Panel Colors

- Choose custom colors for the login and sign-up boxes to match your brand
- Disable Login or Signup
    - Disable Login Section – Hides the Login section from the Customer Portal.
    - Disable Signup Section – Hides the Signup section from the Customer Portal.

      The Login and Signup sections can be disabled independently.

5. Set Font and Text Colors

- Customize the font style and text color used across the login screen.

6. Background Color Settings

- Select background colors for:
- The overall login screen background
- The login and sign-up form background areas

7. Visual Designer: Drag-and-Drop Layout Editor

Customer Portal includes a visual editor that allows you to:

- Visually preview your login screen as you customize it.
- Drag and reposition elements such as:
    - Logos
    - Company contact details
    - Notes for new users
    - Login and sign-up panels

This intuitive layout editor ensures your login page looks exactly how you want it—without needing any coding.

8. Add a YouTube Video Panel

You can add a YouTube video to the Customer Portal login screen by enabling the**YouTube Video Panel**.

- **Enable YouTube Video Panel on Portal Login Screen** – Enable this option to display the YouTube video panel on the login screen.
- **Embedded YouTube Link** – Paste the complete YouTube **Embed Code** obtained from **YouTube → Share → Embed → Copy**.
- **Note:** Paste the complete YouTube Embed Code in this field. The system will automatically extract the original video URL from the `src` attribute and populate the **Original YouTube Link** field. **Do not paste a regular YouTube watch URL** in the Embedded YouTube Link field.
- **Original YouTube Link** – Displays the original YouTube video URL extracted from the embedded code.

9. Configure the Server Down Message

The **Enter Server Down Message** section allows you to enter a message to display when the Login or Signup functionality is unavailable.

The **Select Enter Server Down Message Font And Color** settings allow you to customize the message appearance:

- **Text Font** – Select **Bold** or **Normal**.
- **Font Size**
- **Text Color**
- **Background Color**

How to Access Find Parts Settings

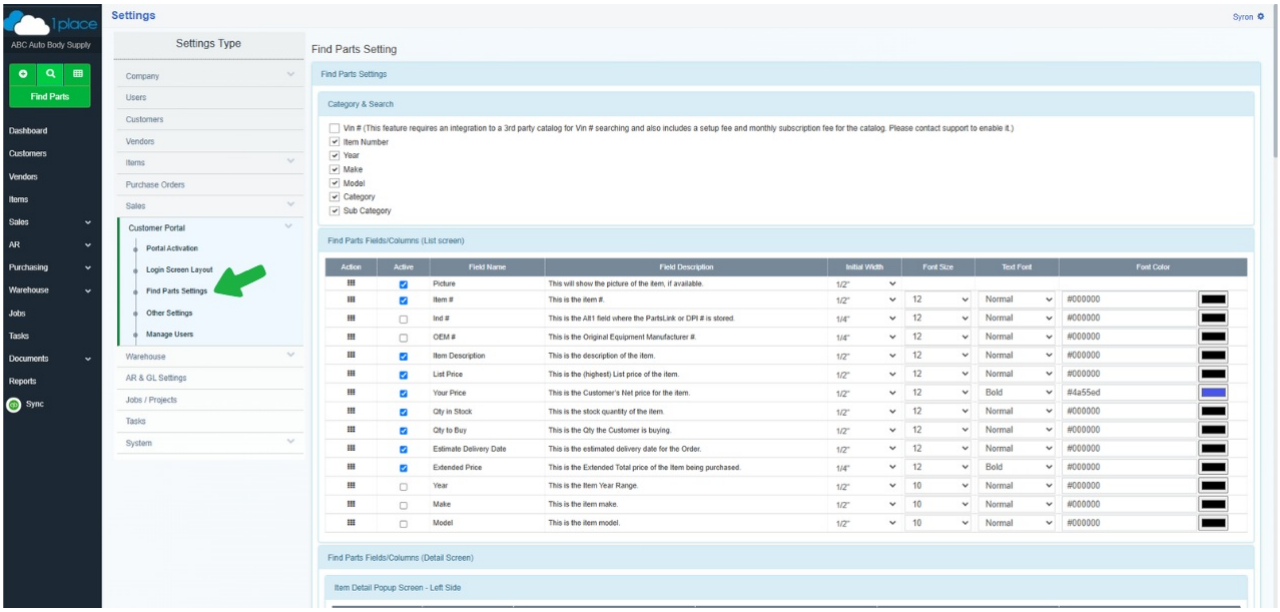
In **1place**, click the **gear icon** beside your name located at the top-right corner of the screen.

Click **Settings**.

In the **Settings** screen, select **Customer Portal** under the Setting Type list.

Click **Customer Portal** to expand the available settings.

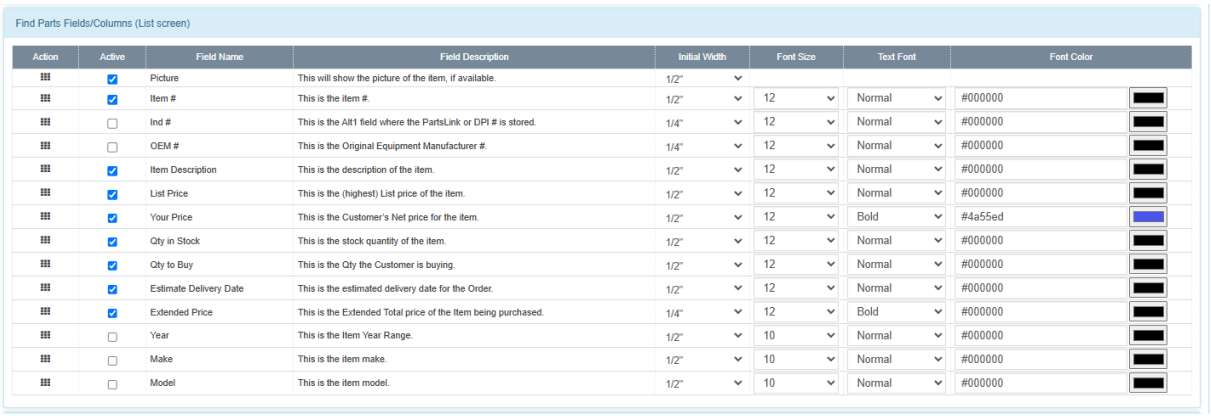
Click **Find Parts Settings.**



The Find Parts screen in the Customer Portal can be tailored to show only the fields and columns that are most useful to your customers. These settings allow you to control both visibility and layout.

1. Select Which Fields/Columns Are Shown

- In the **settings** screen, each available field is listed in a table.
- To make a field visible to portal users, simply **check the box** beside it under the **Active column**.
- Unchecked fields will be **hidden** from the portal view.


Find Parts Fields/Columns (List screen)

Action	Active	Field Name	Field Description	Initial Width	Font Size	Text Font	Font Color
⠿	☑	Picture	This will show the picture of the item, if available.	1/2"			
⠿	☑	Item #	This is the item #.	1/2"	12	Normal	#000000
⠿	☐	Ind #	This is the Alt1 field where the PartsLink or DPI # is stored.	1/4"	12	Normal	#000000
⠿	☐	OEM #	This is the Original Equipment Manufacturer #.	1/4"	12	Normal	#000000
⠿	☑	Item Description	This is the description of the item.	1/2"	12	Normal	#000000
⠿	☑	List Price	This is the (highest) List price of the item.	1/2"	12	Normal	#000000
⠿	☑	Your Price	This is the Customer's Net price for the item.	1/2"	12	Bold	#4a55ed
⠿	☑	Qty in Stock	This is the stock quantity of the item.	1/2"	12	Normal	#000000
⠿	☑	Qty to Buy	This is the Qty the Customer is buying.	1/2"	12	Normal	#000000
⠿	☑	Estimate Delivery Date	This is the estimated delivery date for the Order.	1/2"	12	Normal	#000000
⠿	☑	Extended Price	This is the Extended Total price of the Item being purchased.	1/4"	12	Bold	#000000
⠿	☐	Year	This is the Item Year Range.	1/2"	10	Normal	#000000
⠿	☐	Make	This is the item make.	1/2"	10	Normal	#000000
⠿	☐	Model	This is the item model.	1/2"	10	Normal	#000000

2. Arrange Column Order

- Use **drag-and-drop controls** under the **Action column** to arrange the columns in the desired left-to-right order on the list screen.

3. View Field Names and Descriptions

- Each field includes a **name** and a short **description** to help you understand what data it shows.
- This helps admins decide which fields are appropriate for end users.

By customizing these fields, you ensure customers only see the most relevant data when searching for parts—making the portal cleaner, more efficient, and easier to use.

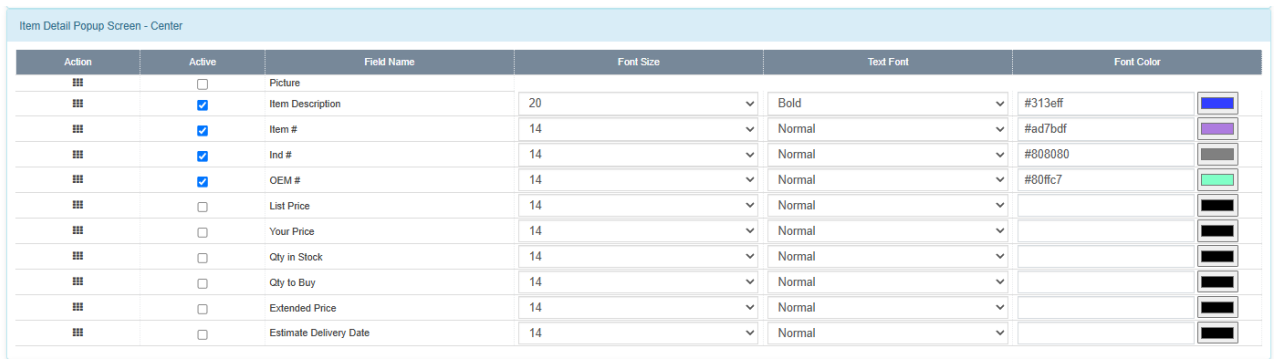
Item Detail Popup Screen – Layout Settings (Left, Center, Right Panels)

The item detail popup is divided into **three panels: Left, Center, and Right.** Each panel has its own separate configuration section, but they all draw from the same list of available fields.

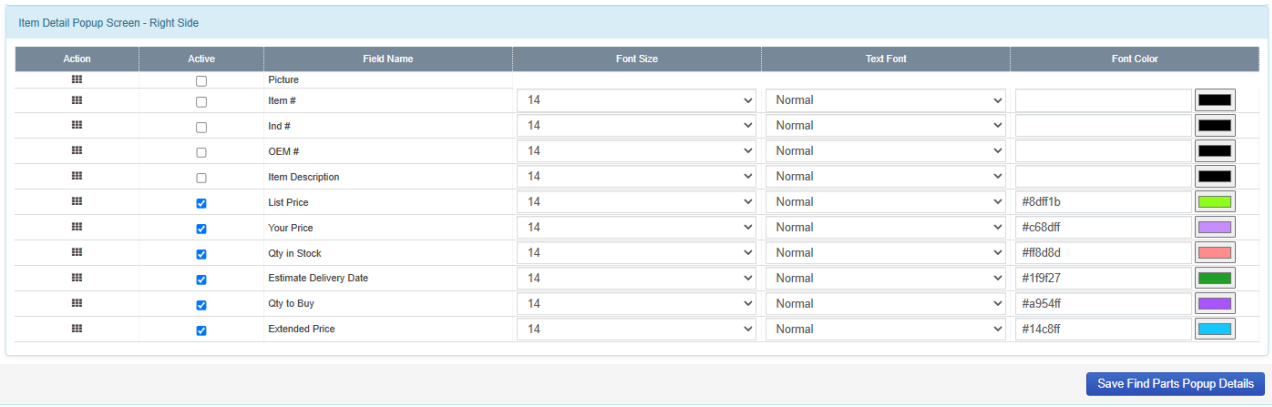

Find Parts Fields/Columns (Detail Screen)

Item Detail Popup Screen - Left Side

Action	Active	Field Name	Font Size	Text Font	Font Color
⠿	☑	Picture			
⠿	☐	Estimate Delivery Date	14	Normal	
⠿	☐	Item #	14	Normal	
⠿	☐	Ind #	14	Normal	
⠿	☐	OEM #	14	Normal	
⠿	☐	Item Description	14	Normal	
⠿	☐	List Price	14	Normal	
⠿	☐	Your Price	14	Normal	
⠿	☐	Qty in Stock	14	Normal	
⠿	☐	Qty to Buy	14	Normal	
⠿	☐	Extended Price	14	Normal	


Item Detail Popup Screen - Center

Action	Active	Field Name	Font Size	Text Font	Font Color
⠿	☐	Picture			
⠿	☑	Item Description	20	Bold	#313eff
⠿	☑	Item #	14	Normal	#ad7bdf
⠿	☑	Ind #	14	Normal	#808080
⠿	☑	OEM #	14	Normal	#80ffc7
⠿	☐	List Price	14	Normal	
⠿	☐	Your Price	14	Normal	
⠿	☐	Qty in Stock	14	Normal	
⠿	☐	Qty to Buy	14	Normal	
⠿	☐	Extended Price	14	Normal	
⠿	☐	Estimate Delivery Date	14	Normal	



In each section—**Left, Center, and Right**—you will:

1. Select Which Fields Are Shown (Active Column)

- In each panel's settings, you'll see a list of all available fields.
- Use the **Active column checkbox** to choose which fields appear in that specific panel.
- You can show a field in one, two, or all three panels, depending on your needs.

2. Arrange Field Order (Action Column)

- Within each panel section, use the **Action column** to set the order in which fields appear (top to bottom).
- This is done by clicking and dragging the rows into the desired order using the **arrange icon** under the action column.

3. View Field Names

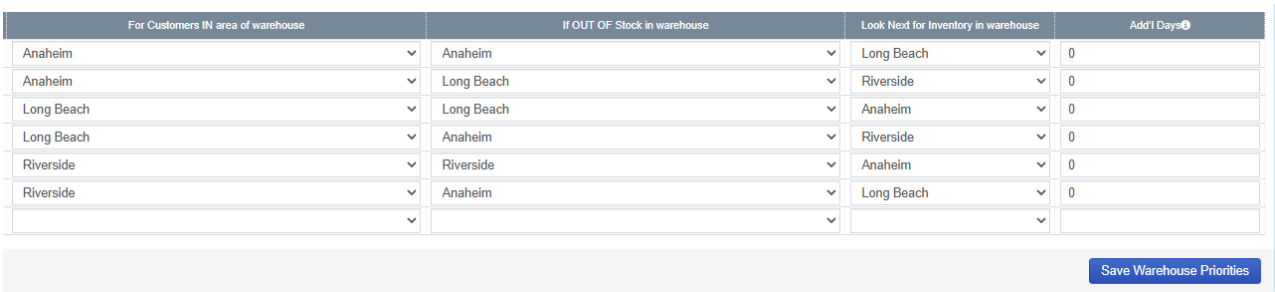
- Each field is labeled for clarity so you know what data will be shown.

4. Set Text Appearance

- Each panel has its own text styling controls, so you can define the appearance of fields per section:
  - **Font size**
  - **Font style**
  - **Font color**

This setup gives you precise control over how information is displayed in each section of the popup. Even though you're choosing from the same list of fields, the layout and styling are configured independently for the Left, Center, and Right panels.

The Warehouse Shipping Priorities section lets you define how the system chooses which warehouse to use when fulfilling customer orders. This setup ensures that inventory is sourced efficiently and in the correct order of priority.



Each row in the table represents a priority level, and you can fully control the order and warehouse logic using the

options provided.

1. **Arrange Priority Order (Action Column)**
   - **Click and drag** the rows into the desired order using the arrange icon under the action column to reorder the priority levels.
   - The system will attempt to fulfill orders based on this top-to-bottom priority.

2. **For Customers IN Area of Warehouse**
   - Use the **dropdown** to select which warehouse should be prioritized when the customer is located within that warehouse's shipping area.

3. **If OUT OF Stock in Warehouse**
   - Select the fallback warehouse using the **dropdown,** to be used if the primary warehouse is out of stock.

4. **Look Next for Inventory In Warehouse**
   - Choose an additional warehouse the system should check next, if the first two options don't have available inventory.

5. **Save Warehouse Priority**
   - After setting all your preferences, click the Save Warehouse Priority button located at the bottom left of the section.
   - This saves your shipping logic and updates the system's fulfillment behavior.

This setup gives you full control over how inventory is sourced and ensures customers receive their orders from the most appropriate warehouse based on availability and location.

The Layout Options section allows you to control how fields are displayed in the Search and Line Item interfaces within the Customer Portal.

Search Field Layout Option
This option determines how search filters are presented when customers are looking for parts.

- Choose from the dropdown:
  - Item, Year, Make, Model, Category, Sub-category
  - Item, Year, Make, Model, Category (Show Selectable List), Sub-category (Show Selectable List)

Line Item Field Layout Option
This setting controls how fields are displayed for each line item (e.g., in quotes, orders, and results lists).

- Choose from the dropdown:
  - Columns (no stocking)
  - Columns, but with Description and Item #s Stacked

These options help you tailor the customer interface for usability and clarity based on your business preferences.

The Inventory Item Settings section allows you to control how inventory availability, delivery timing, and pricing visibility behave on the Customer Portal. These settings impact how information is displayed and what purchasing rules apply.

Estimated Delivery Date Format
Choose how the estimated delivery date is displayed to customers:

- **Date** (e.g., July 25, 2025)
- **Day/Date** (e.g., Thursday, July 25)

Cut-Off Times for Delivery
Specify cut-off times (per hour) for when new orders must be placed to qualify for specific delivery windows:
- **Same-Day Delivery Cut-Off Time** - Orders placed before this time are eligible for same-day delivery.
- **Next-Day Delivery Cut-Off Time** - Orders placed before this time will be delivered the next day.

Estimated Delivery Text (Out of Stock Items)
- Enter the custom message to display when an item is not currently in stock.
    - Example: "Please Call"

Additional Days for Inter-Warehouse Transfers
- Set the **number of days to add to the estimated delivery date** if the item is being shipped from another warehouse.
    - This reflects realistic transfer time between warehouses.

How to Display Inventory in Stock (Dropdown Option)
Choose how inventory levels are displayed on the portal:
- **Show actual quantity**
- **Show quantity of 1**
- **Show "In Stock"** (no quantity number shown)

Purchasing Restrictions (Checkbox Options)
- **Do not allow users to buy items that are OUT of stock** - Prevents orders on items with zero available inventory.
- **Do not allow users to buy more items than what is available** - Prevents customers from exceeding current stock levels in their order.
- **Hide items on the Find Parts screen if they have a price of $0.00** - Useful for suppressing test items or incomplete pricing.
- **If List Price is displayed, only display List Price if an item is out of stock** - Helps reduce pricing confusion when availability is limited.

These settings allow for tight control over inventory visibility, order rules, and delivery expectations, helping you deliver a consistent and transparent customer experience.

The Sales Order Settings section controls how online orders are processed in the portal, including who is assigned to each order and how returns are handled.

Assign Salesperson for Online Orders
- Choose a default salesperson from the dropdown list of existing 1place users.
- This user will be automatically assigned to all sales orders placed through the Customer Portal.

Return Processing Options (Checkboxes)
- Automatically credit customer account when they request a return
    - Enables auto-crediting once a return request is submitted.
    - Useful for streamlining the return and credit process.
- Override returns to only send an email notice
    - Disables automatic return processing.
    - Instead, the system will simply send a notification email when a return is requested, allowing manual

handling.

These settings help align the portal's order and return behavior with your internal sales and accounting processes.

This section allows you to set up alerts and restrictions that are shown to portal users based on their account status, credit limits, or IP address. These checks help enforce your credit policies while keeping users informed.

Overdue Invoice Message

- Enter the custom message to display when a user has **overdue invoices.**
- This message will be shown in the portal based on the checkbox settings below.

Credit Limit Warning Message

- Enter the message to display if the current quote or order could place the **user over their credit limit.**
- Useful for alerting users before they finalize the transaction.

Blocked IP Addresses

- Enter **IP addresses** you want to block from accessing the portal.
- Multiple IPs can be entered, **separated by commas** (e.g., 192.168.1.1, 10.0.0.1).

PDF Statement Access

- If you host PDF statements on your own server, enter the **directory or URL path** here.
- Customers will then be able to **download** their statements directly from the portal.

Warning and Restriction Options (Checkboxes)

- **Display a message if the user has any overdue invoices on the welcome screen** - Shows the overdue message immediately after login.
- **Display a message if the current order will put your user over their credit limit on the quote screen** - Warns the user during the quoting process before the order is finalized.
- **Stop customer from ordering if over credit limit** - Blocks the ability to place an order if doing so would exceed their credit limit.

These settings help ensure that your financial policies are clearly communicated and enforced, while also improving transparency for your customers.

This setting allows you to define which days of the week your business is available to process and deliver orders. The system uses this information when calculating estimated delivery dates shown to customers.

Simply **check the days your business operates and fulfills orders**.

Only the selected days will be considered eligible delivery days when the system calculates estimated delivery timeframes during ordering or quoting.

This section allows the designated admin to enter contact information that will be used for internal reference or displayed to customers where appropriate (such as in support messages or system emails).

Admin Fields to Complete:

- Your Name
- Your Email
- The Best Phone # to Reach You
- Preferred Portal Login Name

The Email Settings section must be completed to enable SMTP (Simple Mail Transfer Protocol), which allows the Customer Portal to send automated emails (e.g., order confirmations, password resets, and return notifications).

Required Fields:

- E-Mail Provide
- Outgoing Mail Server
- Outgoing Server Port
- Email Address
- Password
- Enable SSL

After entering your email configuration, click the **Test Connection** button to verify that the SMTP setup is working properly.
The system will attempt to send a test email. If successful, you'll see a confirmation message. If there's an error, check your credentials, server settings, and SSL option.

The Email Templates section allows you to create and manage reusable email templates for automated messages sent through the portal.

Creating a New Template

- Click the New Template button.
- A pop-up window will appear where you can fill out:
  - Template Name – internal reference for the template
  - From Address – the email address the message will be sent from
  - Subject – the subject line of the email
  - Body – the main message content (can include dynamic fields, if supported)
- Click Save to store the template.

Editing an Existing Template

To edit an existing template:

- Locate it in the list of templates.
- Click the Edit button under the Action column.
- A pop-up will open where you can update the From Address, Subject, or Body.
- Save your changes once editing is complete.

This section allows you to specify internal email addresses that will receive automated notifications when key customer actions occur in the Customer Portal.

How to Enter Email Addresses:

For each type of notification below, you can enter one or more email addresses.
To send notifications to multiple recipients, separate each email with a comma.

Notification Types:

- **New Customer Sign-Ups** - Notifies your team when a customer registers on the portal.
- **New Orders** - Sends an alert each time a customer places an order.
- **Potential Customer Abuse** - Alerts your team if suspicious or potentially abusive activity is detected.
- **Customer Part Returns** - Notifies you when a customer submits a part return request.

This section controls which automated emails the Customer Portal sends to your customers, and allows you to choose which email templates are used for each type.

Email Triggers (Checkboxes):

- Send email Quote Confirmation to the user who created the Quote.
- Send email Order Confirmation to the user who created the Sales Order.

When these options are enabled, customers will receive email confirmations automatically after submitting quotes or placing orders.

Email Template Selection

For each type of customer-facing email, you can select a pre-created template from the list of email templates:

- Select Quote Confirmation Email Template
- Select Sales Order Confirmation Email Template
- Select New User Sign Up Email Template
- Select User Activation Email Template

These templates define the subject, message body, and sender information used in each customer notification.

This setting enables real-time credit card transactions through your integrated eBizCharge.com account.

Option Available:
Enable real-time eBizCharge.com Credit Card Authorizations
When checked, the portal will authorize customer credit card payments in real time during checkout using your eBizCharge integration.

Be sure your eBizCharge account is properly connected to 1place for this feature to work correctly.

This section allows you to customize messages that appear to customers during key interactions within the Customer Portal.

New User Signup Landing Message

- A message shown to customers immediately after they sign up for a portal account. (Text box – up to 500 characters)

- Use this to welcome users, provide next steps, or direct them to resources.

Return Policy

- Enter your company's return policy to be shown on the portal where applicable (e.g., during part return requests).

Follow these steps to invite a customer to access the 1place Customer Portal:

1. In the 1place **Dashboard**, click **Customers** in the left navigation pane.
2. Select the **customer's name** from the **Customer List**.
3. Go to the **Customer Portal tab**.
4. Then click on the **Portal Users** tab.
5. Enter the user's **email address** and **username**.

- Make sure the email address is correct, as this will be used for sending the portal invite.
- Once the information is filled in, click **Send Invite** under the **Actions column** to send an activation email to the customer.

The user will receive an email with a link to activate their Customer Portal account./

If you'd prefer to activate a portal user account yourself, without sending an email invite:

1. Click the **Activate Manually** button in the **Actions column**.
2. You will be prompted to enter a **temporary password** for the user.
3. After entering the password, click **Save**.
4. A **confirmation pop-up** will appear once the activation is complete.

Your customer can now log in to the portal using their email and the temporary password you provided.
It's recommended that customers change their password after first login.

If a customer no longer needs access to the Customer Portal, you can disable or delete their login.

Steps:

1. In the 1place **Dashboard**, click **Customers** in the left navigation pane.

2. Select the **customer's name** from the **Customer List.**
3. Go to the **Customer Portal tab**.
4. Then click on the **Portal Users tab.**
5. Locate the **portal user** you want to manage.
6. Under the **Actions column**, click either:

- **Disable** – Temporarily disables the user's portal access without deleting their information.
- **Delete** – Permanently removes the user's portal login.

Note: Deleting a portal user is irreversible. Only disable if you may need to restore access later.

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1. Share your **portal web address** with your customers (e.g., abcautobodysupply.1place.cloud).
2. On the portal login screen, they should find and complete the **Sign Up** form, which asks for:

- **Company**
- **First Name**
- **Last Name**
- **Street**
- **City**
- **State**
- **Zip/Postal Code**
- **Phone**
- **Email/Login**
- **Choose Password**
- **Confirm Password**
- Once all fields are completed, they click **Submit.**
- A **confirmation message** will appear:
  "Your request has been successfully submitted. We will email you login information asap."

Once a customer signs up through the portal, follow these steps to review and approve their access:

1. In the 1place **Dashboard**, click the **gear icon** in the upper-right corner, then select **Settings.**
2. Under **Setting Type**, click **Customer Portal** to expand the options, then select **Manage Users**.
3. Go to the **Customer Portal New Sign Ups to Link & Approve** section.

4. You'll see a list of all new customer sign-ups.
5. In the **Select Company Name** column, use the **dropdown** to link the new user to the **correct customer account in 1place**.
6. Review the **First Name**, **Last Name**, and **Email Address** entered during sign-up.
7. If the user should be granted access (e.g., verified by management and linked to the correct company), click **Approve**.
   If not approved, click **Delete Sign Up** to remove the request.

Repeat the process for the rest of the pending sign-ups.

Below the Customer Portal New Sign Ups to Link & Approve section, you'll find a list of all existing customer portal logins.

This list displays the following information:

- Customer Name
- Username
- Email Address
- Login Status (e.g., Active, Inactive)
- Approved By (the admin who approved the login)
- Date Approved

Under the Actions column, you can:

- Send Invite to users who haven't activated their account
- Disable an active login
- Delete a login entirely
- Activate Manually if you prefer to bypass email invitation

Use this section to monitor and manage customer portal access at any time.

To access the Customer Portal, your customer should:

1. Open a **web browser** (preferably Google Chrome).
2. Go to your company's portal address (e.g., abcautobodysupply.1place.cloud).
3. On the login page, locate the Customer Login section.
4. Enter their Email Address and Password, then click Login.
5. Once logged in, they will be directed to the Find Parts screen.

[update details later...]

How to Import Users from another Customer Portal System

- Prepare an Import File of Portal Users.
  - On the **Manage Users** screen, click **Import List of Portal Users**
  - This will open the **Import Wizard (for Portal Users)**.
  - Click the **Download Excel Template** button.
  - Following the Template example, create a list of Portal Users to import.
    - The email must be valid.
    - The Customer # must match an existing Customer in 1place.
    - The Password CAN be left blank, if you do not have it to import. (In this case, when the **Approve All Imported Users** is clicked all users that have NO password will receive an Email asking them to create a Password and activate their poral login).
    - If the Password being imported is 'plain English' then insert **Yes** in the column called **PlainTextYesNo**.
- Setup Email Templates
  - See **How to Create Email Templates** below.
- Import Portal Users file
  - When ready use the Import Wizard for Portal Users (by clicking the **Import List of Portal Users** button again).
- Review Imported Portal Users
  - On the **Manage Users** screen (in the Portal Settings) review the Users that you imported (on the top portion of the scren).
  - When ready, click the green **Approve All Imported Users** button.
    - If the Password has been imported the User Portal account (and the User Status) will be set to 'Activated'.
    - If the Password field (when importing the list of users) is BLANK, clicking the **Approve All Imported Users** will send an email and will change the User 'Status' to 'Invitation Sent'.
      - NOTE: You will need

How to Create Email Templates

How to Mass Send (or Re-Send) Portal Invites

- (Finish later...)

Customer Portal Auto Job

How to Configure Customer Portal Login Abuse Notifications

The **Auto Job Options** settings allow administrators to configure notifications for potentially unusual Customer Portal login activity. You can define login activity thresholds, specify who receives email notifications, and manually send a notification when needed.

Auto Job Options

Configure the following settings:

- **If more than ____ Logins within past 90 Days** – Enter the number of logins that triggers the login activity threshold within the past 90 days.
- **And % of Logins to Sales < ____ %** – Enter the minimum percentage threshold for the ratio of logins to sales. When the percentage falls below the configured value, the conditions can identify customer activity for review.
- **Send Email To** – Enter the email address that should receive the notification.

Configure the Automated Job

A **New/Edit Automated Job** shortcut button is available to open the main automated job associated with **Customer Portal Abuse**. Use this shortcut to configure the automated job that supports the login abuse notification process.

Send an Email Manually

Select **Send Email Manually** to send the notification manually instead of waiting for the automated job to run.

Save Your Settings

After configuring the login thresholds and notification recipient, select **Save Setting** to save the Auto Job Options.

Overview

The **Portal Reports & Audit Log** screen allows Customer Portal administrators to monitor customer activity, review portal sales performance, identify changes in ordering patterns, and investigate unusual login activity. These reports help administrators understand how customers use the portal and identify accounts that may need follow-up.

How to Access Portal Reports

To access the screen:

1. Click the **Gear** icon on the dashboard.
2. Select **Settings**.
3. Under **Settings Type**, select **Customer Portal**.
4. Select **Reports (Audit Log)**.

How to Generate a Portal Report

The **Reports** tab allows you to generate reports based on a selected report type, date range, and customer.

1. Open **Portal Reports & Audit Log** and select the **Reports** tab.
2. Select a **Report Type**:
    - **Sales - Best to Worst** – Ranks customers by sales performance, from best to worst.
    - **Sales - Biggest Drop in Sales** – Helps identify customers whose sales have decreased compared with the previous period.
    - **Login Abuse** – Helps identify unusual or potentially excessive customer portal login activity.
3. Select a **Date Range**:
    - **Last 30 Days**
    - **Last 90 Days**
    - **365 Days**
    - **Custom** – Specify the reporting period using the **From Date** and **To Date** fields.
4. Under **Customer**, select **All Customers** or choose a specific customer from the dropdown.
5. If needed, enter a keyword in the **Search** field to narrow the results.
6. Click **Filter** to generate the report.

Understanding the Portal Reports

Each report provides different information to help you evaluate customer activity. The columns displayed depend on the selected report type.

Sales - Best to Worst

This report ranks customers by their sales performance through the Customer Portal. Use it to identify your strongest portal customers, review which accounts generate the most sales, and understand how frequently customers use the portal to place orders or request quotations. It can help you recognize active customers and identify accounts that may benefit from additional engagement.

The report includes the following columns:

Column	Description
Customer #	The customer's number in 1place.
Customer Name	The name of the customer associated with the portal activity.
$ Portal Sales	The total sales amount recorded through the Customer Portal for the selected reporting period.
# Portal SO	The number of Sales Orders associated with the customer's portal activity.
# Portal Quotations	The number of quotations associated with the customer's portal activity.
Total # Users	The total number of users associated with the customer.
Last Login Date	The date and time the customer last logged in to the Customer Portal.
Last Order Date	The date of the customer's most recent order.
# Days Since Last Order	The number of days since the customer's last order.
# Searches	The number of searches performed by the customer in the portal.
% of Logins to Orders	The percentage of customer portal logins that resulted in orders.

Sales - Biggest Drop in Sales

This report compares each customer's sales and order activity over the last 30 days with the previous 30 days. Use it to identify customers whose sales have declined, determine whether their ordering frequency has changed, and prioritize accounts for follow-up. For example, a customer who placed several orders in the previous period but has placed few or no orders recently may need assistance or a check-in from your account management team.

The report includes the following columns:

Column	Description
Customer #	The customer's number in 1place.
Customer Name	The customer's name.
Last Login 30 Days	The customer's last login information for the last 30 days, as displayed by the report.
$ Sales Last 30 Days	The customer's sales amount for the most recent 30-day period.
# Order Last 30 Days	The number of orders placed during the most recent 30-day period.
$ Sales Previous 30 Days	The customer's sales amount for the 30 days preceding the most recent 30-day period.
# Order Previous 30 Days	The number of orders placed during the previous 30-day period.

Compare the sales and order columns for both periods to identify changes in customer activity. A decrease in sales or order count may indicate that a customer is ordering less frequently or purchasing fewer items.

Login Abuse

This report helps administrators review customer portal login activity and identify accounts that may require further investigation. Use it to spot unusually frequent logins, compare login activity with order activity, and identify accounts with repeated portal access but little or no ordering. Unusual activity does not necessarily indicate misuse, so review the results in context before taking action.

The report includes the following columns:

Column	Description
Customer #	The customer's number in 1place.
Customer Name	The customer's name.
Last Login	The most recent login information recorded for the customer.
# Logins	The number of logins recorded for the customer in the report.
# Orders	The total number of orders recorded for the customer in the report.
# Order 30 Days	The number of orders placed during the last 30 days.
$ Sales 30 Days	The customer's sales amount for the last 30 days.

Review login counts alongside recent orders and sales to determine whether the activity appears consistent with the customer's normal portal usage. If something looks unusual, investigate further before concluding that the account has been misused.

Note: Report results depend on the selected report type and filters. Some values may be zero or blank when no corresponding activity is recorded.

How to Generate an Audit Log

The **Audit Log** tab allows Customer Portal administrators to review recorded portal activities, including logins, orders, quotations, and returns. Use the audit log to investigate customer activity, verify when actions occurred, and review which customer and user were associated with a transaction.

1. Open **Portal Reports & Audit Log** and select the **Audit Log** tab.

2. Select a **Type** to filter the activity you want to review:

    - **All** – Displays all available activity types.

    - **Login** – Displays customer portal login activity.

    - **Order** – Displays order-related activity.

    - **Quotation** – Displays quotation-related activity.

    - **Return** – Displays return-related activity.

3. Select a **Date Range**:

- **Last 30 Days**
- **Last 90 Days**
- **365 Days**
- **Custom** – Specify the reporting period using the **From Date** and **To Date** fields.

4. Under **Customer**, select **All Customers** or choose a specific customer from the dropdown.
5. If needed, enter a keyword in the **Search** field to narrow the results.
6. Click **Filter** to display the audit log entries that match your selected criteria.

Understanding the Audit Log Columns

The audit log displays individual activity records in a table. Each row represents a recorded event, helping administrators identify when an activity occurred, which customer and user were involved, and any associated transaction details.

Column	Description
Date/Time	The date and time the activity was recorded.
Customer #	The customer number associated with the activity.
Customer Name	The name of the customer associated with the activity.
User Name	The username associated with the recorded activity.
Type	The type of activity recorded, such as Login.
Transaction #	The transaction number associated with the activity, when applicable.
Notes	Additional information about the activity, when available.

Use the filters to narrow the log to a particular customer, activity type, or time period. This makes it easier to review specific events without having to browse all recorded activity.