



Portal Setup

Please review Admin Getting Started Guide Prior to this guide.

How to Access

The link for accessing the customer portal is provided in 2 formats on the Admin / Setting screen.

Portal Link HTML provides a hyperlink that can be placed in the HTML of your current website or be sent via email to your customers.

Portal Link Direct is a hyperlink which will take you to your portal from our site.

Who Has Access

When you add a family to the system as long as you key in an email and password the user can have access to the portal.

A new user who comes to your portal and registers will have access to the portal.

Taking Payments from Portal

We provide the ability to take payments via PayPal from the portal.

Under Admin / Settings then PayPal Settings you must check the PayPal Enabled box and key in a valid PayPal account email address. Click Save.