# B2B - Setting up Contacts with Portal Access

Last Modified on 04/02/2020 2:36 pm EDT

These are the steps to add your customer Contacts to the B2B Portal in Order Time Inventory

- **Granting Access to your B2B Portal**
    - Go to the Full List drop-down on the left-hand side of Order Time
    - Select your Contacts List
    - Click on the Contact you want to invite
    - Click on the Invite to Portal button at the top-left shown below
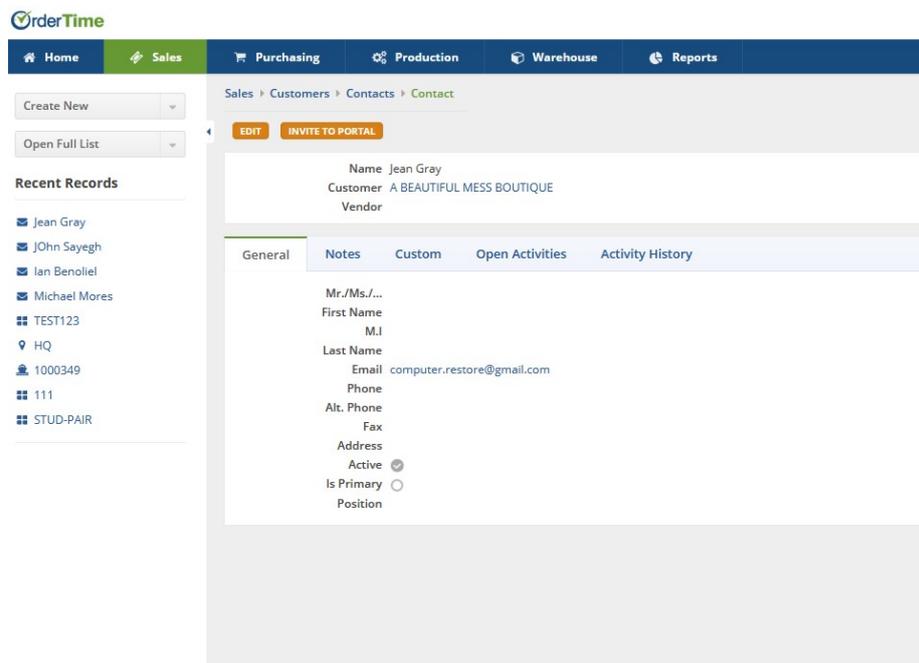
    - This immediately sends an e-mail to their primary e-mail address on file that reads as follows:

You have been invited to our customer portal ⊃ [Inbox ✕]

info@ordertime.com
to ▾

Dear Jean Gray

You have been invited to our customer portal.   Please click on the following link to reset your password.

Link to reset their password

After you set your password you will able to login with email [Their e-mail address]

Thank you
Ian Benoliel

- **Revoke Access to the B2B Portal**

  - Go to the Full List drop-down on the left-hand side of Order Time
  - Select your Contacts List
  - Click on the Contact you want to revoke
  - Click on the Revoke button at the top-left shown below

    Sales ▸ Customers ▸ Contacts ▸ Contact

    [EDIT] [REVOKE]

    Name Jean Gray
    Customer A BEAUTIFUL MESS BOUTIQUE
    Vendor

    | General | Notes | Custom | Open Activities | Activity History |

   Mr./Ms./...
    First Name
    M.I
    Last Name

  - No email is sent about access being revoked, however if they try to login with their credentials they won't be able to access anything.

- **Adding the Portal Access Column to your Contacts List**

  - Go to the Full List drop-down on the left-hand side of Order Time
  - Select your Contacts List
  - Click the Cog in the top-right, above the New Contact Button
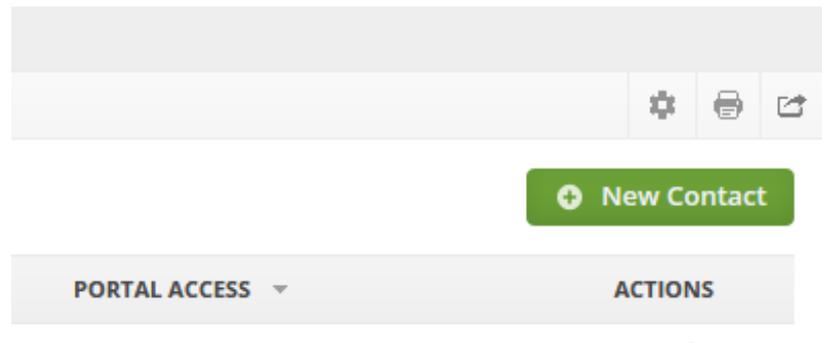
- Click the Columns Tab
- Move the Column over called B2BPortalAccessStatus
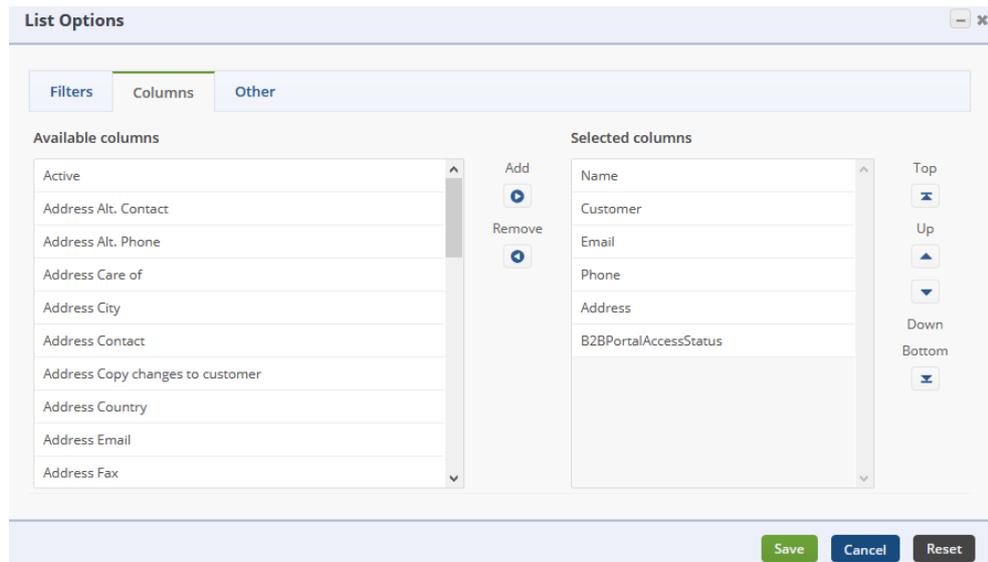
- Click Save
- Now you can see all the Contacts that have access at a glance

PORTAL ACCESS ▾	ACTIONS
Granted	✎ ⊗
Granted	✎ ⊗
Granted	✎ ⊗
None	✎ ⊗
None	✎ ⊗
None	✎ ⊗
None	✎ ⊗
None	✎ ⊗
None	✎ ⊗
None	✎ ⊗

- **Make sure to test out a few test contacts first to get a feel for how it all works!**
- Next Step, **Learn How to Set Up Payments for the B2B Portal**

Return to the B2B Portal Guide