

The customer and supplier portal

Website and portal

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Website and portal

The customer and supplier portal

Let customers and suppliers sign in to see their own quotations, orders, invoices and tickets.

Intermediate · About 20 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Offered in **custom packages**. Contact us to ask about it.

Overview

The **portal** is a simple area for people outside your company. A customer signs in and sees only **their own** quotations, orders, invoices and shipments. It saves phone calls asking for copies.

Steps

Choose what appears

1. Search for **Portal Settings**.
2. In the menu table, tick the items you want to show, such as *Invoices*, *Orders* and *Quotations*, and untick the rest.
3. Save.

Invite a customer

1. Open the **Customer** record.
2. Add a **Contact** with the person's email address.
3. In the contact, click **Invite as User**. A portal user is created and they receive an email to set a password.
4. The person signs in at your Hesabu ERP address and sees their portal.

Check what they see

Use a test customer contact, sign in on another browser, and check that only that customer's documents are visible.

Practical example

A key customer is invited. The next month their accountant signs in, downloads three invoices and views the statement, with no need to ask your office.

Important notes

- Portal users are **not** staff. They have no access to your desk or other customers' data.
- Remove access when a contact leaves their company. See Creating users and assigning roles.
- Check portal visibility with a test account before inviting real customers.

Common mistakes

- Inviting the wrong email address, which gives a stranger access to a customer's invoices.
- Forgetting to untick menu items you do not want to share.

Troubleshooting

If a customer cannot see their invoices, check that the contact is linked to the right customer, and that the invoices are submitted and not drafts.

Next steps

Return to Website and portal overview.

Related documentation

- Website and portal overview
- Permissions and restricting access
- Creating and managing customers