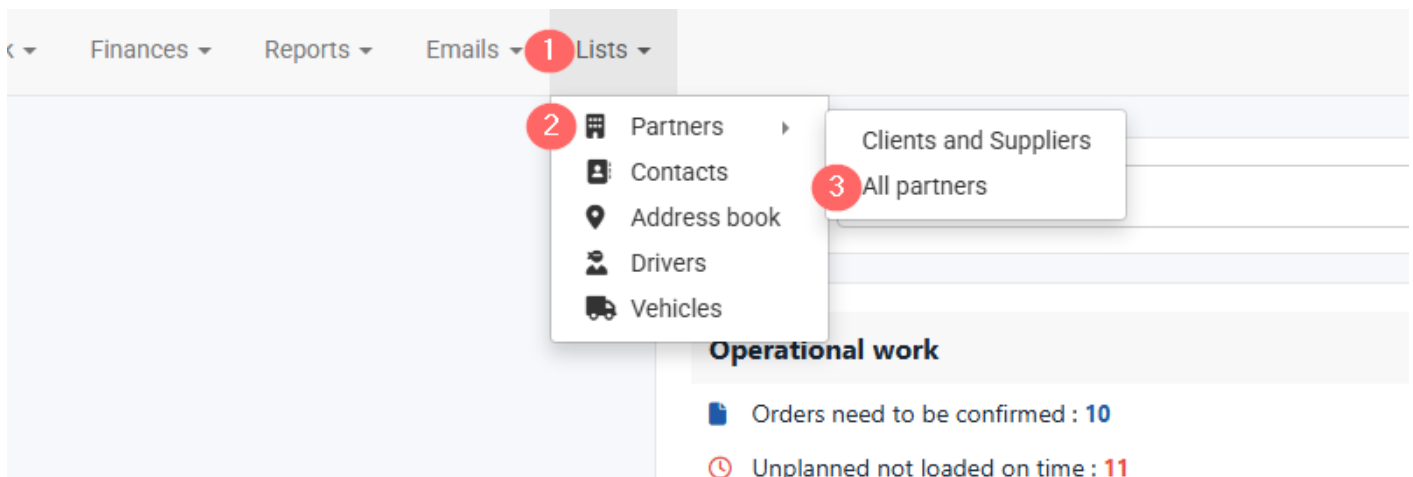


How to give access and rights to Client and Carrier portal and send Invitation for Access

The customer portal can be activated from the customer profile.

1. Open **Lists** in the top navigation bar.
2. Select **Partners**.
3. Click **All Partners**.



4. Find the required partner.
5. Click the **Edit** icon .  to open the partner profile.

	New ▾	Operational work ▾	Finances ▾	Reports ▾	Emails ▾	Lists ▾
Clients and Suppliers 1 All partners						
Cloudex	Selected all ▾	Selected all ▾	Selected all ▾			
☒	Code ↑ ▾	Name ▾	Registration number ▾	VAT code ▾	Postal address ▾	
☒	Cloudex SIA	Cloudex SIA	40103294170	LV401032941701	Skolas iela 4, LV-3018 Ozolnieki	

6. Select the manager you want to grant portal access to, then click the **Edit** icon to open contact.

Partner : Cloudex SIA
×

Basic data
Invoices
Sales
Notification settings
Attachment(s)
Statistics
Route price
Other

Name
Code
Reg No.
Client status
Carrier status
Send invoices
Reminder email
Notes

Language
VAT code
Groups
Status info
Client category
Invoice email

	Name	Email	GSM	Phone	Position	Notes	
	Stanislav Yevsiukov	stas2020401@gmail.com	+380931693050		Shipment manager		
	Juris Driver	Juri@gmail.com					

7. Switch from **Basic data** to the **Clients & Carriers Portal access** section to give **Access granted**.

8. Review and click **Send invitation** to Client contact person.

Contact : Stanislav Yevsiukov

Basic data

Client & carriers portal access

Login email

stas2020401@gmail.cor

✉ Send invitation

Login status

Last login: 06.06.2025 16:14

Permissions

	Access granted
Enable portal access	☒
Show user "Client menu"	☒
Show user other maneger orders	☒
Show user order sum	☒
Show user order attachments	☒
User can add New orders	☐
Show user "Terminal menu"	☐
Show user "Carrier menu"	☐
Show user "His truck list"	☐

Saved: 13.07.2026 12:19 JanisV

Delete

Save

Cancel

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