

Client, Contact, and Leads Permission Details

Each listed item represents what functionality is available through the [Client Portal](#) menus.

- Client Portal – gives access to the *Client Portal*.
- Client Profile – gives access to the entire *Client Profile* menu.
- Profile – corresponds to the *View Profile* menu that contains their address and contact information, authentication, billing summary, and authorized contacts.
- Payment Methods – corresponds to the *Payment Methods* menu that contains their credit cards, bank accounts, and billing agreements.
- Change Password – corresponds to the *Change Password* menu that opens the change password function.
- Manage Contacts – corresponds to the *View Contacts* menu that contains the Contacts list.
- Manage Contact Facility Access – corresponds to the *View Contacts* menu that leads to the facility access functionality.
- Billing & Services – gives access to the entire *Billing & Services* menu.
- Invoices – corresponds to the *View Invoices* menu that contains their *View Invoices* list.
- Services – corresponds to the *View Services* menu that contains the list of services
- Tax Exemptions – corresponds to the *View Tax Exemptions* menu that contains their *View Tax Exemptions* list.
- Credits – corresponds to the *View Credits* menu that contains their *View Credits* list.
- Orders - corresponds to the *View Orders* menu that contains their View Orders list. Order steps can be configured to be viewed by clients. See [Working with Order Queues](#) for more information.
- PayPal Subscriptions - corresponds to the *PayPal Subscriptions* menu that contains their PayPal subscriptions.
- Quotes - corresponds to the *View Quotes* menu that contains their *View Quotes* list.
- Billing Email – allows any and all billing related emails to be sent, including overdue notices, payment receipts and new invoices.
- Reports – gives access to the *Reports* menu.
- Event Log - corresponds to the *Event Log* menu that contains their *Event Log*.
- Mail Log - corresponds to the *Mail Log* menu that contains their *Mail Log*.
- Client Ledger Log - corresponds to the *Client Ledger Log* menu that contains their *Client Ledger*.
- Domain Management – gives access to the *Domain Management* menu.
- List Domains - corresponds to the *List Domains* menu that contains their *View Domains* list.
- Lookup Domain - corresponds to the *Lookup Domain* menu that opens the Lookup Domain functionality.
- Support – gives access to the Support menu.
- Tickets - corresponds to the *View Tickets* menu that contains their *View Open/On Hold Tickets* list.
- Other's Tickets - corresponds to the open ticket link that contains their *View Open/On Hold Tickets* list. This displays all submitted tickets if access is granted.
- Ticket Search Tickets - corresponds to the *Ticket Search* menu that contains the *Ticket Search* functionality.
- Device Manager – gives access to the *Device Manager* menu.
- Devices - if you have added and configured device manager, this will let them view their devices and where they are located.
- Racks – corresponds to the *View Racks* menu that contains their *Racks* list.
- Cages – corresponds to the *View Cages* menu that contains their *Cages* list.
- Facilities – corresponds to the *View Facilities* menu that contains their *Facilities* list.
- IP Addresses - corresponds to the *View IP Addresses* menu that contains their *IP Addresses* list.
- DNS Zones - corresponds to the *View DNS Zones* menu that contains their *View Domains: DNS Zones* list.
- DNS Records – gives access to the *DSN records* from the *View DNS Zones* and *View Devices* menu.
- Client Preferences Support – gives access to the *Support Preferences* page from the *Client Support* icon.

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[Adding Contacts](#)

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