

Customer Portal and Payment Link Guide

Customer Self-Service | Managers, office staff, and sales staff

Let wholesale and contractor customers place requests and pay balances online while your team keeps pricing, approval, and scheduling control inside FlintPOS.

What This Guide Helps You Do

- Set the boundary between customer self-service and office approval.
- Invite the right accounts into the portal and keep control over pricing and scheduling.
- Use payment links to reduce phone-based collections work.

WHY SELF-SERVICE IS CONTROLLED, NOT OPEN-ENDED

FlintPOS is designed so the customer can help move routine work forward without taking control away from your office. Portal orders come in as requests, payment links give customers a secure path to settle balances, and your team still controls what gets approved, scheduled, and finalized.

WHEN THE PORTAL IS MOST USEFUL

- Repeat contractor and wholesale accounts that already know your products and ordering patterns.
- Customers who call often for routine reorders that do not require a long consultative sales process.
- Accounts where customers need quick access to balances and order history.

WHY PAYMENT LINKS HELP THE OFFICE

- Customers can pay by card or ACH without reading information over the phone.
- The office can send a direct action link instead of writing manual instructions.
- Payments stay tied to the order and customer account inside FlintPOS.

PORTAL SIGN-IN, SETUP, AND RESET FLOWS

Portal access has three separate paths: first-time setup, normal sign-in, and password reset. Keeping those paths straight prevents support churn.

**1****First-time users start from the invite email**

The setup link is not a normal login. It opens the portal password screen, validates the token, and signs the customer in after they choose a password.

2**Returning users sign in with email and password**

FlintPOS stores the portal session locally so customers stay signed in until they log out or the session expires.

3**Forgot password sends a fresh reset email**

Reset links expire quickly. If the customer sees Link Expired, send them back to Forgot password instead of reusing the old email.

DAILY PORTAL USE FOR CUSTOMERS AND OFFICE STAFF

Once signed in, customers can view balances, open orders, deliveries, and payment options without calling the office for every question.

- Orders can be viewed as open items, full history, or pending requests.
- Pending portal requests can still be cancelled by the customer before approval.
- Order detail can open a payment link for the specific balance due when online payments are enabled.

CUSTOMER DISPLAY AND PORTAL LINKS ARE DIFFERENT TOOLS

The customer display is an in-store live cart screen paired to a register. The customer portal is an account self-service site for later access. Do not hand a customer-display URL to a portal user or a portal URL to a checkout screen.

- Customer display pairing comes from Connection Settings and is tied to a workstation.
- Portal links are shared from the customer record or the public portal URL.
- If a customer-facing screen shows a register picker or Welcome screen, that is the in-store display app, not the account portal.

BEST PRACTICES

- Invite only customers with clean contact data and a clear account owner.
- Explain to customers that portal submission is a request, not an automatic dispatch promise.
- Use payment links consistently for collections so customers learn the process.

BEST PORTAL CUSTOMERS

- Contractor and wholesale accounts with stable terms and repeat ordering patterns.



- Customers who already rely on emailed statements or balance follow-up.
- Accounts where self-service reduces phone traffic for simple order requests.

PAYMENT-LINK OFFICE SCRIPT

A simple office instruction is: "I am sending you a secure payment link now. Open the email, choose card or ACH, and the payment will post back to your FlintPOS order."

Keep Going

Use the FlintPOS Docs hub to search for related guides by role, category, or job to be done. Open the interactive walkthrough at </quickstart/portal.html> when you want a screen-by-screen visual refresher.