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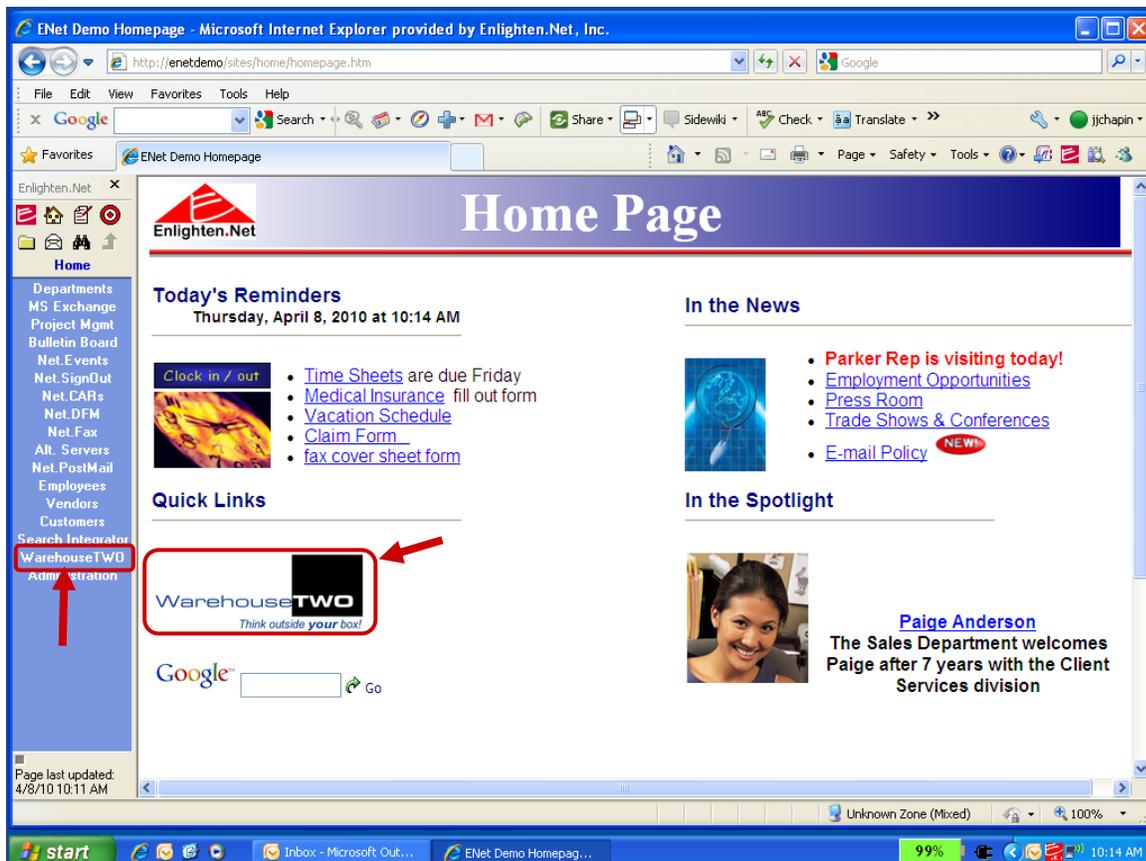
About PORTAL ACCESS

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PORTAL ACCESS functionality gives WarehouseTWO members an alternative method to access and use the WarehouseTWO web site. This functionality adds these two capabilities to a WarehouseTWO user account:

- The ability to create a hyperlink on your company's intranet site to enable instant login to the WarehouseTWO website for anyone who has access to the site, without requiring the entry of a user ID or password.
- Concurrent login sessions on multiple devices using the same user-ID/password combination or hyperlink.

Example of **PORTAL ACCESS** deployment: hyperlink on a company's intranet site:



(Intranet home page example courtesy of Enlighten.Net, Inc., www.enlighten.net.)

Portal Access is a premium feature, available only to Level 4 and Level 5 member accounts.

Benefits of PORTAL ACCESS

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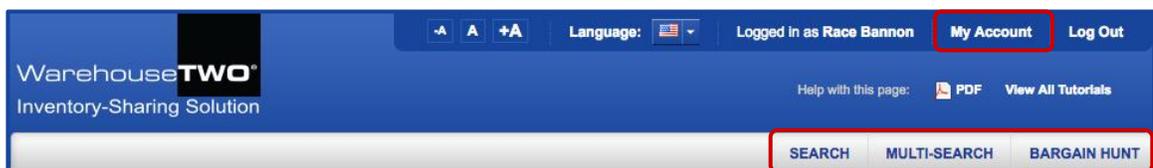
The benefits of **PORTAL ACCESS** include:

- Reduced account administration: you no longer have to create and manage individual WarehouseTWO user accounts for your employees who do not need administrative access to the WarehouseTWO website. All non-administrator employees can access WarehouseTWO via a single “shared” user account.
- Increased security: You can limit access to WarehouseTWO to only current employees logged into your company’s intranet. If an ex-employee can’t access your intranet, then he/she will not have access to WarehouseTWO. This is especially important if an ex-employee joins a competitor.
- “Single Sign-On” functionality: With a properly placed hyperlink in your business system software or on your company’s intranet, your employees can log into your internal system, then access WarehouseTWO without having to take extra steps to log into our web site via a browser.
- Concurrent logins: multiple devices can connect to the WarehouseTWO website at the same time, allowing for shared use of a common user account.
- Restricted access to member account settings and information: **PORTAL ACCESS** functionality and “administrator” functionality are mutually exclusive. Thus, a **PORTAL ACCESS** user does not have access to certain areas of the WarehouseTWO website. Compare the three screenshots below. A **PORTAL ACCESS** user does not have access to any administrator menus and does not have access to the “My Account” link. Thus, a user logged into the WarehouseTWO website cannot view or edit the user account information, including the account password, and cannot make changes to member account or user account settings.

Menu choices for an **administrator**,



Menu choices for a **non-administrator**:



Menu choices for a **PORTAL ACCESS** user:



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The **PORTAL ACCESS** functionality is an attribute of a user account. This feature is intended to be set up for a single user account created to be shared by many users. It is not necessary or recommended that this feature be activated for individuals' user accounts.

The screenshot shows the Warehouse TWO administrative interface. The 'ADMINISTRATIVE TOOLS' menu is open, and the 'Users' tab is selected. A table lists users, with 'Elmer Fudd' highlighted. The 'EDIT USER' pop-up window is open, showing the 'Portal Access' checkbox checked. The 'Administrator' checkbox is unchecked. The 'Portal Access URL' is displayed at the bottom of the pop-up window.

| Name | User ID | Email | Last Login Date | Administrator | Portal | Login Status |
|--------------------|---------------|----------------------------------|-----------------|-------------------------------------|--------------------------|--------------|
| Bugs Bunny | bbunny | bbunny@me.com | 4/23/2020 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | CONNECTED |
| Elmer Fudd | efudd | efudd@me.com | 4/8/2019 | <input type="checkbox"/> | <input type="checkbox"/> | IDLE |
| GUI Tester Level 4 | GUI_tester4.1 | customerservice@warehousetwo.com | 4/30/2018 | <input type="checkbox"/> | <input type="checkbox"/> | IDLE |

EDIT USER

* First Name: Elmer
 * Last Name: Fudd
 * User ID: efudd
 * Email Address: administrator@looneytunes.com
 * Password: *****
 Require Manual Entry of a sender's email address when sending a BROADCAST REQUEST email.

"Default Language": English (US)
 Title: Wabbit Hunter
 * Phone Number: 888-867-5309
 Extension:
 Fax Number:
 * User Location (City, ST/PR, Country): Carmel-by-the-Sea, CA, USA

Administrator
 Receive Reminders (user will receive automated inventory data expiration reminder emails)
 Receive Email Announcements (user will receive monthly emails concerning account activity, plus periodic announcements from WarehouseTWO)
 Portal Access (non-administrative user only; concurrent logins enabled; auto-login via URL displayed below enabled; URL appears after checking this box and saving the record)

Default Portal Access User Email Address
 (This field is used only for a "Portal Access" user record. When the box on the left side of this window, labeled "Require Manual Entry...", is not checked, the email address entered above will overwrite the email address entered into the "Email Address" field on the left side of this window in the "Broadcast Request" and "Send Email to Seller" pop-up windows.)

Portal Access URL: (Click on URL to copy it)
<https://www.warehousetwo.com?portalUser=b009c26d-ceef-4ec9-97e7-f0f75537e0ff>

DELETED USER Cancel SAVE CHANGES

Step 1: On the "Users" tab in the "Account Settings" section under the "ADMINISTRATIVE TOOLS" menu, choose an existing user account (click on the user name, 1) or create a new user account (click on the box labeled, "ADD NEW USER", 2). Either action will open an "EDIT USER" pop-up window.

Step 2: In the "EDIT USER" pop-up window, click on the box labeled, "Portal Access" (3). If the box labeled "Administrator" (4) had been checked, checking the "Portal Access" box will

automatically uncheck this box and also cause the “Receive Reminders” box and “Receive Email Announcements” box (5) to become editable. It is recommended that these two boxes be **unchecked**.

Step 3: In the field labeled “Email Address” (6), enter the email address of an account administrator, not the email address of any of the persons who will be using this user account. This is so that users of this account cannot retrieve the user ID or password using the “Forgot Your User ID and/or Password?” link on the WarehouseTWO home page.

Step 4: Check the box labeled, “Require Manual Entry...” (7). This will cause the sender’s email address fields in the “Broadcast Request” and “Send Email to Seller” pop-up windows not to be auto-populated with this user account’s assigned email address (8). Instead, each user of this **PORTAL ACCESS** account will be required to enter his/her own email address before sending a “Broadcast Request” or “Send Email to Seller” email from the WarehouseTWO system.

Leave the field labeled “Default Portal User Email Address” (8) blank.

Step 5: To save all changes made to the new or edited user record, click on the “SAVE CHANGES” button (9).

To view and/or capture the **PORTAL ACCESS** URL that can be used as a hyperlink at your company’s intranet site, click on the **PORTAL ACCESS** user account (1). At the bottom of the “User Edit” screen will be displayed this user account’s unique **PORTAL ACCESS** URL (10). Click on the URL to copy it to your computer’s “clipboard”.

Tips and Tricks

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To get the best results with the **PORTAL ACCESS** feature:

1. If your company has an employee intranet, create a link to WarehouseTWO there. Make this link the only method for your employees to access WarehouseTWO, unless they need “administrative” access to the WarehouseTWO website. (Administrators should have their own user accounts.) Then, immediately after doing this, change the password for this **PORTAL ACCESS** user account and delete all previously existing **PORTAL ACCESS** user accounts. This will restrict access to your WarehouseTWO member account to only current employees.
2. Convert an existing bookmark in one’s browser to a **PORTAL ACCESS** button by editing the bookmark: overwrite the default URL behind the bookmark with the URL created for the **PORTAL ACCESS** user account.
3. Change the password and URL for a **PORTAL ACCESS** user account periodically, such as quarterly. To do this, uncheck the “Portal Access” box (8) and save the change (9). Then, go back to editing the **PORTAL ACCESS** user account, change the password, recheck “Portal Access” box (8), and re-save the changes (9). After doing this, update the URL on the company intranet with the revised **PORTAL ACCESS** account URL (10). This process is a good way to ensure that ex-employees have not copied/saved the **PORTAL ACCESS** URL for their own personal use.
4. Train all employees who have access to a **PORTAL ACCESS** user account to overwrite two specific default values auto-populated into the “Message” field in the “Broadcast Request” and “Send Email to Seller” email pop-up windows. The default values that should be overwritten are:
 - a) sender’s first and last names
 - b) sender’s telephone number

Got a Question?

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Got a question about this feature? Let us help:

- a) [Email us](#).
- b) Call us at 650.329.1592.
- c) Post your question to our LinkedIn group, [WarehouseTWO Users Forum](#).