

Sending Client Portal Invitations

Use this guide to ensure a seamless invitation process for your clients. This method uses Account Management to grant access.



Before You Begin: Important Note

All Contacts Included: Be aware that this invitation process will send an email invitation to all contacts associated with the account record. If you only wish to invite certain individuals, ensure your account contacts are updated before continuing.

Step-by-Step Instructions

- **Open Account Management:** Log in to your Zywave portal and select Account Management.
- **Select Your Account:** Locate the specific account and contact(s) you wish to invite.
 - Click View
 - Pro Tip: If the account does not exist, select +Add account in the upper right to create it.
- **Initiate the Invitation:** In the account details, find the Client services section and select Send invite.
- **Choose the Portal:** A list of available portals will appear. Select the one you wish to invite the account contact(s) to and click Continue.
- **Complete the Invite:** Follow the remaining on-screen prompts from step 5 onward to finalize your invite.

Maximize Engagement

Help your clients succeed. Don't just send an invite—help your clients get the most out of the tools you are providing.

For Your Clients | Live Training Sessions

Direct your clients here to register for live training walkthroughs led by Zywave experts. This is the fastest way to get them comfortable and confident using the portal. Link: educate.zywave.com/page/client-portal