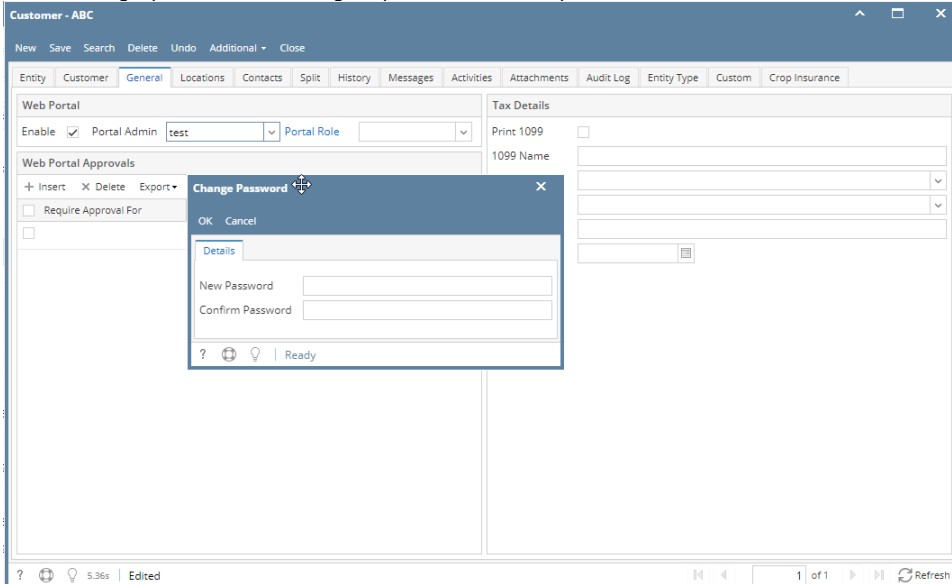


How to Assign a Portal Admin

Pre-requisite: There should be an email address before you can assign a Portal Admin:

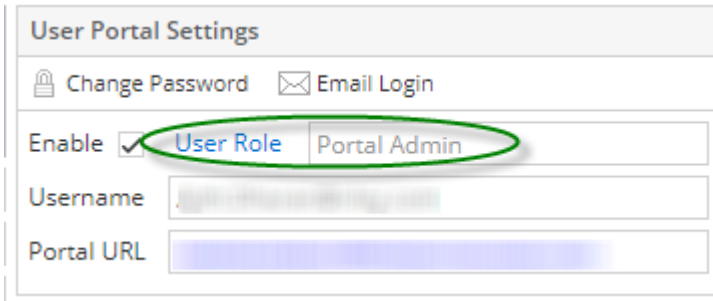
Here are the steps on how to assign a Portal Admin:

1. Log in as an Admin/internal user
2. Open an entity record
3. Click the **General** tab
4. On the **General** tab's **Web Portal** panel, check the **Enable** check box to enable the selection for portal admin
5. Select a **Portal Admin** from the drop down
6. After selecting a portal admin, a change of password will be required. Enter the New Password and Confirm Password.

The screenshot shows a software interface for a customer record titled 'Customer - ABC'. The 'General' tab is active, displaying the 'Web Portal' section. The 'Enable' checkbox is checked, and the 'Portal Admin' dropdown is set to 'test'. A 'Change Password' dialog box is overlaid on the screen, with fields for 'New Password' and 'Confirm Password'. The dialog also has 'OK' and 'Cancel' buttons. The background form includes various other tabs like 'Locations', 'Contacts', and 'Split', and a 'Tax Details' section on the right.

Note: If Change Password is cancelled, portal access will be removed.

7. Select a **Portal Role**
8. Click the **Save** button.
9. Go to **Contacts** tab and select the assigned portal admin.
10. Open the record and check on the **User Role** field. It should be labeled as **Portal Admin**.

The screenshot shows the 'User Portal Settings' form. It has a header with 'Change Password' and 'Email Login' options. Below, there is an 'Enable' checkbox which is checked. The 'User Role' field is highlighted with a green oval and contains the text 'Portal Admin'. There are also fields for 'Username' and 'Portal URL'.

11. Login to the system using the newly created portal admin

Pre-requisite: The following fields must be filled in before you can assign a Portal Admin:

- Email
- Timezone
- Approval List (if the entity is vendor)

Here are the steps on how to assign a Portal Admin:

1. Log in as an Admin/internal user
2. Open an entity record

3. Click the **General** tab

The screenshot shows the 'Entity - 137-Ent' form with the 'General' tab selected. The 'Web Portal' section is visible, showing the 'Enable' checkbox and the 'Portal Admin' dropdown menu. The 'Enable' checkbox is currently unchecked.

4. On the **General** tab's **Web Portal** panel, check the **Enable** check box to enable the selection for portal admin

The screenshot shows the 'Entity - 137-Ent' form with the 'General' tab selected. The 'Web Portal' section is visible, showing the 'Enable' checkbox and the 'Portal Admin' dropdown menu. The 'Enable' checkbox is now checked, and the 'Portal Admin' dropdown menu is open, showing a list of users.

5. Select a Portal Admin from the drop down

The screenshot shows the 'Entity - 137-Ent' form with the 'General' tab selected. The 'Web Portal' section is visible, showing the 'Enable' checkbox and the 'Portal Admin' dropdown menu. The 'Enable' checkbox is checked, and the 'Portal Admin' dropdown menu is open, showing a list of users. The user '137-Ent' is selected.

6. After selecting a portal admin, a change of password will be required. Enter the New Password and Confirm Password.

The screenshot shows the 'Entity - 137-Ent' form with the 'General' tab selected. The 'Web Portal' section is visible, showing the 'Enable' checkbox and the 'Portal Admin' dropdown menu. The 'Enable' checkbox is checked, and the 'Portal Admin' dropdown menu is open, showing a list of users. The user '137-Ent' is selected. A 'Change Password' dialog box is displayed, prompting the user to enter a new password and confirm it.

Note: If Change Password is cancelled, portal access will be removed.

7. Click the **Save** button.

Here are the steps on how to assign a Portal Admin:

1. Log in as an Admin/internal user
2. Open an entity record
3. On the Entity tab's User Portal panel, check the **Portal Access** check box to enable the selection for portal admin

The screenshot shows the 'Entity - aaa vendor' form. The 'User Portal' section at the bottom right contains the following fields:

- Portal Access:** ☒ (highlighted with a red box)
- Portal Admin:** (empty dropdown)
- User Role:** (empty dropdown)

4. Select a Portal Admin from the drop down

The screenshot shows the 'User Portal' section with the 'Portal Admin' dropdown open. The list of portal admins is as follows:

Name	Email
aaa	aaa@aaa.com
bbb	bbb@bbb.com
ccc	ccc@ccc.com
ddd	ddd@ddd.com

5. After selecting a portal admin, a change of password will be required. Enter the New Password and Confirm Password.

The screenshot shows the 'Entity - aaa vendor' form with a 'Change Password' dialog box open. The dialog box has the following fields:

- New Password:**
- Confirm Password:**

The 'Portal Admin' dropdown in the background is now set to 'aaa'.

Note: If Change Password is cancelled, portal access will be removed.

6. Click the **Save** button.