

How to View and Modify the User Role of Portal Admin

1. Log in as an Admin/internal user
2. Open an entity record, then click the **General** tab
3. On the General tab's **Web Portal** panel, click the **Portal Role** hyperlink

The screenshot shows the 'Customer - abc1' form with the 'General' tab selected. The 'Web Portal' panel is visible, showing 'Enable' checked, 'Portal Admin' as the role, and a 'Portal Role' hyperlink. Below this is the 'Web Portal Approvals' section with a table for approvals.

Require Approval For*	Approver List*	Portal Users Only
<input type="checkbox"/>		<input type="checkbox"/>

The second screenshot shows the 'User Role - Portal Admin' form. The 'Menu Permissions' tab is selected, showing a list of menu items with checkboxes for selection.

Menu Item	Selected
Select All	<input checked="" type="checkbox"/>
Account	<input checked="" type="checkbox"/>
Transactions	<input checked="" type="checkbox"/>
Support	<input checked="" type="checkbox"/>
CRM	<input checked="" type="checkbox"/>
Grain	<input checked="" type="checkbox"/>
Logistics	<input checked="" type="checkbox"/>
Manufacturing	<input checked="" type="checkbox"/>
Card Fueling	<input checked="" type="checkbox"/>
Tank Management	<input checked="" type="checkbox"/>
Payroll	<input checked="" type="checkbox"/>
Risk Management	<input checked="" type="checkbox"/>

4. To modify the role, select/deselect the menus that should be included in the role
***Note that if there are other portal users assigned to this role, their menus/permissions will also change*
5. Click the **Save** button

NOTE: Menus available for the Portal Admin can be configure in the Portal Default in Company Configuration.

1. Log in as an Admin/internal user
2. Open an entity record, then click the **General** tab
3. On the General tab's **Web Portal** panel, click the **User Role** button

The screenshot shows the 'Web Portal' panel with 'Enable' checked, 'Portal Admin' as the role, and a 'User Role' button circled in red.

- When a Portal Admin is created, the User Role will also be created based on the Entity types

User Role - 137-Ent-1353

Save Undo Close

Details Users Audit Log (0)

Role Name: 137-Ent-1353 Role Type: Contact Admin

Description: Contact Administrator

Menu Structure Sub Roles

Master Menu

☒ Select All ☐ Clear All Filter Menu

- ☒ System Manager
- ☒ Purchasing
- ☒ Grain
- ☒ Contract Management
- ☒ Ticket Entry
- ☒ Logistics
- ☒ CRM
- ☒ Help Desk

Role Menu Preview

- System Manager
- Purchasing
- Grain
- Contract Management
- Ticket Entry
- Logistics
- CRM
- Help Desk

Ready Page 1 of 1

- To modify the role, select/deselect the menus that should be included in the role
- Click the **Save** button

- Log in as an Admin/internal user
- Open an entity record, then click the **User Role** button on the **User Portal** panel

User Portal

Portal Access: ☒ Portal Admin: aaa User Role

3. When a Portal Admin is created, the User Role will also be created based on the Entity types

User Role - Portal Admin

Save Undo Close

Details Audit Log (2)

Role Name: Portal Admin Role Type: Contact Admin

Description: Contact Administrator

Menu Structure

Master Menu

☒ Select All ☐ Clear All Filter Menu

- ☒ System Manager
- ☒ Purchasing
- ☒ Grain
- ☒ Contract Management
- ☒ Scale
- ☒ Logistics
- ☒ CRM
- ☒ Help Desk

Role Menu Preview

- System Manager
- Purchasing
- Grain
- Contract Management
- Scale
- Logistics
- CRM
- Help Desk

Page 1 of 1

4. To modify the role, select/deselect the menus that should be included in the role:

User Role - Portal Admin

Save Undo Close

Details Audit Log (3)

Role Name: Portal Admin Role Type: Contact Admin

Description: Contact Administrator

Menu Structure

Master Menu

☒ Select All ☐ Clear All Filter Menu

- ☒ System Manager
- ☒ Purchasing
- ☒ Grain
- ☒ Contract Management
- ☒ Scale
- ☐ Logistics
- ☐ CRM
- ☒ Help Desk

Role Menu Preview

- System Manager
- Purchasing
- Grain
- Contract Management
- Scale
- Help Desk

5. Click the **Save** button