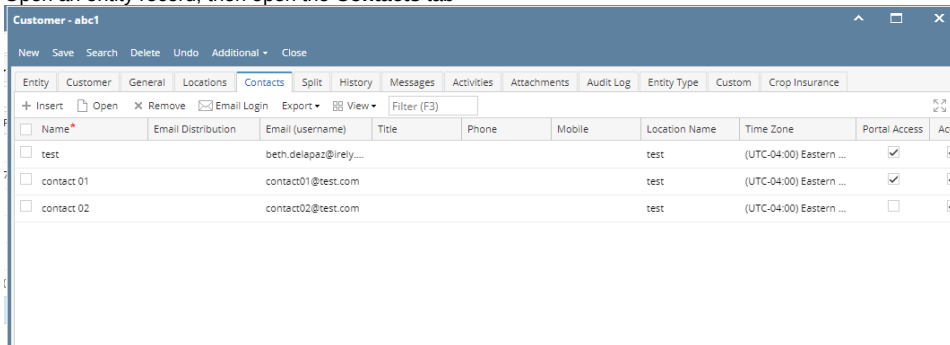


How to Assign Portal Access to Contact List

Both the Portal Admin and the internal user can assign portal access to the contact list

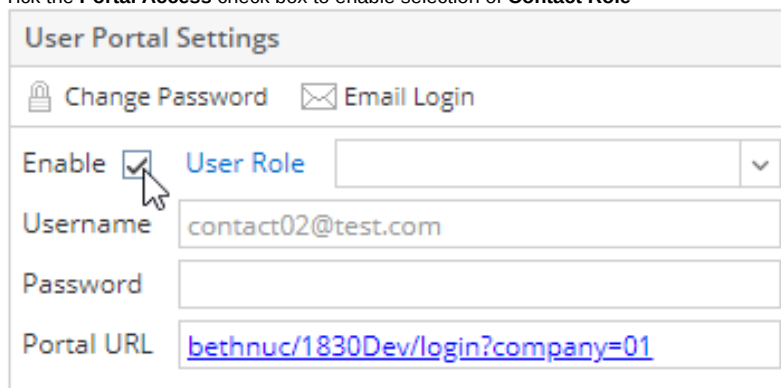
To Assign Portal Access by Internal User:

1. Log in as an Admin/internal user
2. Open an entity record, then open the **Contacts** tab



Name	Email Distribution	Email (username)	Title	Phone	Mobile	Location Name	Time Zone	Portal Access	Act
☐ test		beth.delepaz@irely...				test	(UTC-04:00) Eastern ...	☒	☒
☐ contact 01		contact01@test.com				test	(UTC-04:00) Eastern ...	☒	☒
☐ contact 02		contact02@test.com				test	(UTC-04:00) Eastern ...	☐	☒

3. Select and open the contact record to have portal access
4. Tick the **Portal Access** check box to enable selection of **Contact Role**



User Portal Settings

Change Password Email Login

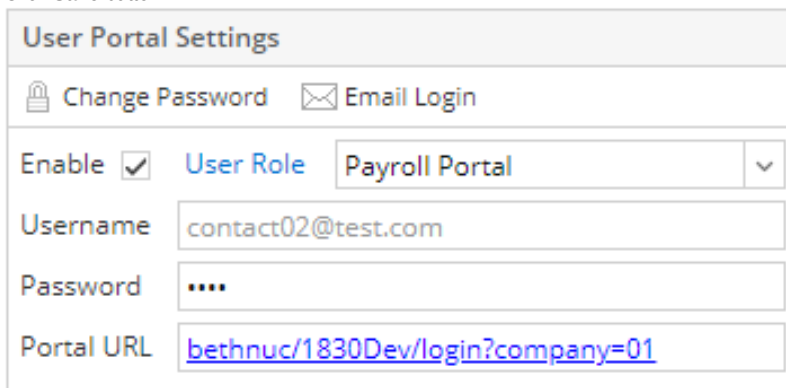
Enable ☒ User Role

Username

Password

Portal URL

5. Select a user role for the contact or create a new by clicking the User Role hyperlink if the field is blank
6. Enter a password for the contact
7. Click **Save** button



User Portal Settings

Change Password Email Login

Enable ☒ User Role

Username

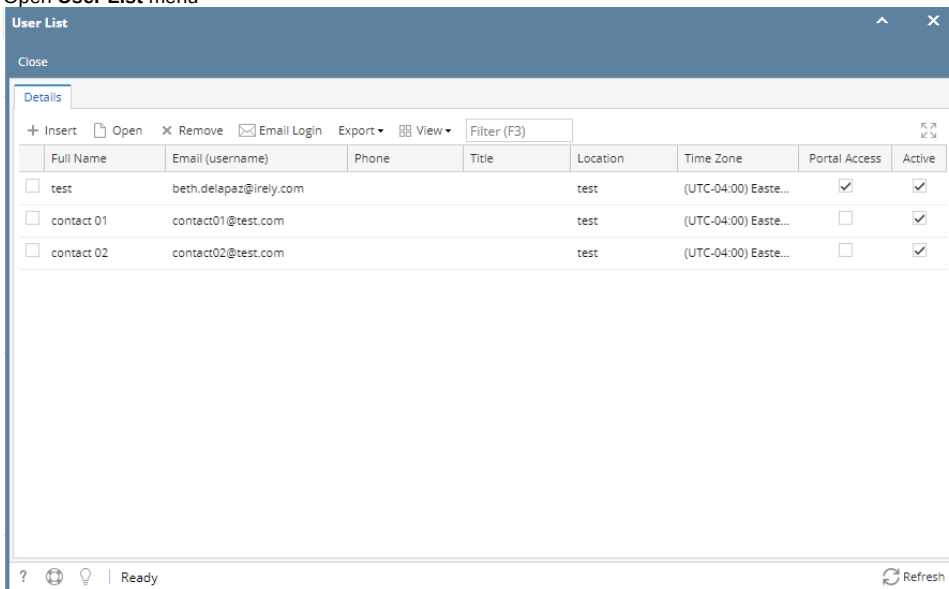
Password

Portal URL

To Assign Portal Access by Portal Admin:

1. Log in as Portal Admin

2. Open **User List** menu

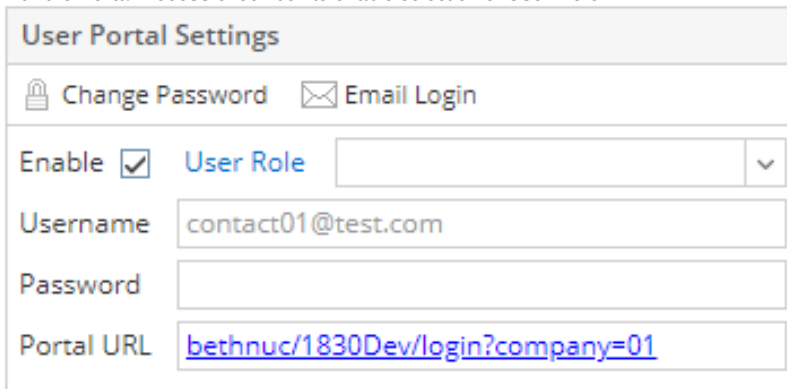


The screenshot shows a 'User List' window with a 'Details' tab. It contains a table with columns: Full Name, Email (username), Phone, Title, Location, Time Zone, Portal Access, and Active. There are three rows of data. The 'Portal Access' column has checkboxes, and the 'Active' column has checkmarks.

	Full Name	Email (username)	Phone	Title	Location	Time Zone	Portal Access	Active
☐	test	beth.delapaz@irely.com			test	(UTC-04:00) Easter...	☒	☒
☐	contact 01	contact01@test.com			test	(UTC-04:00) Easter...	☐	☒
☐	contact 02	contact02@test.com			test	(UTC-04:00) Easter...	☐	☒

3. Select and open the desired contact record to have portal access

4. Tick the **Portal Access** check box to enable selection of **User Role**

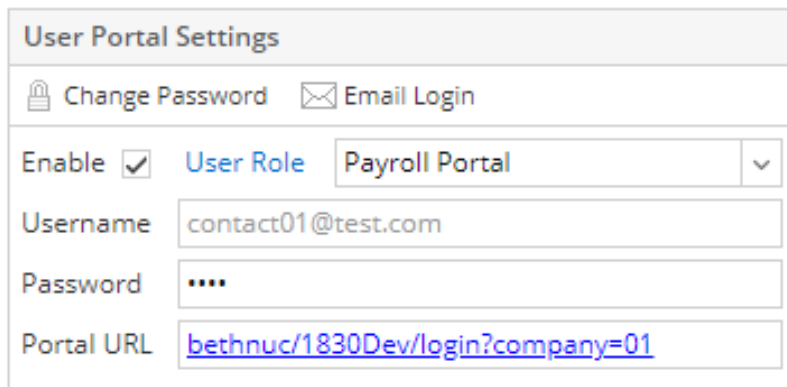


The screenshot shows the 'User Portal Settings' form. It has a 'Change Password' button and an 'Email Login' button. The 'Enable' checkbox is checked. The 'User Role' dropdown is blank. The 'Username' field contains 'contact01@test.com'. The 'Password' field is empty. The 'Portal URL' field contains 'bethnuc/1830Dev/login?company=01'.

5. Select a user role for the contact or create a new by clicking the User Role hyperlink while the field is blank

6. Enter a password for the contact

7. Click **Save** button



The screenshot shows the 'User Portal Settings' form after changes. The 'User Role' dropdown now shows 'Payroll Portal'. The 'Password' field now contains four dots '....'. The 'Portal URL' field remains 'bethnuc/1830Dev/login?company=01'.

To Assign Portal Access by Portal Admin:

1. Log in as Portal Admin

2. On user's menu panel, expand **Purchasing/Sales** then select **Vendor Contact List**

The screenshot shows the 'Vendor Contact List' window. It has a 'Close' button at the top left. Below the title bar is a 'Details' tab. A toolbar contains '+ Insert', 'Open', 'Remove', 'Email Login', 'Layout', and a search icon. A 'Filter Records (F3)' input field is on the right. The main area is a table with columns: Full Name, Email (username), Phone, Title, Location, Timezone, Portal Access, and Active. There are three rows of data.

	Full Name	Email (username)	Phone	Title	Location	Timezone	Portal Access	Active
☐	137-Ent	137-Ent@irely.com			137-Ent Location	(UTC-11:00) Coord...	☒	☒
☐	contact1	contact1@test.com				(UTC-12:00) Intern...	☐	☒
☐	contact2	contact2@test.com				(UTC-12:00) Intern...	☐	☒

At the bottom, there is a status bar with icons for help, refresh, lightbulb, and email, followed by the text 'Ready'.

3. Select and open the contact record to have portal access

The screenshot shows the 'Entity Contact - contact1' window. It has a title bar with 'New', 'Save', 'Delete', 'Undo', and 'Close' buttons. Below the title bar are tabs: 'Detail', 'CRM Information', 'Audit Log (1)', and 'Additional Information'. The 'Detail' tab is active. It contains a form for contact information: Full Name (contact1), Email (username) (contact1@test.com), Title, Country (Philippines), Timezone ((UTC-12:00) International Date Line West), Phone, Contact Method, Location Name, Department, Type, Email Distribution, and Active (checked). There is an 'Add Photo' button. To the right is the 'User Portal Settings' section with 'Change Password' and 'Email Login' buttons, 'Portal Access' (checked), 'User Role' (dropdown), Username (contact1@test.com), and Portal URL (localhost/1620.210/i21/). Below this is the 'Contact Information' section with '+ Insert', 'X Remove', and 'Types' buttons, and a table with 'Type' and 'Details' columns. The status bar at the bottom shows 'Edited' and 'Page 1 of 1'.

4. Tick the **Portal Access** check box to enable selection of **Contact Role**

This is a close-up of the 'User Portal Settings' section. It shows the 'Portal Access' checkbox checked, which is circled in red. Next to it is the 'User Role' dropdown menu. Below are the 'Username' field (contact1@test.com), the 'Password' field, and the 'Portal URL' field (localhost/1620.210/i21/).

5. Select a user role for the contact

User Portal Settings

☐ Change Password ☐ Email Login

Portal Access: ☒ User Role: 137-Ent's Help Desk

Username: contact1@test.com

Password:

Portal URL: localhost/1620.210

6. Enter a password for the contact

Password:

7. Click **Save** button

To Assign Portal Access by Internal User:

1. Log in as an Admin/internal user
2. Open an entity record, then open the **Contacts** tab

Name	Email Distribution	Email (username)	Title	Phone	Mobile	Location Name	Timezone	Portal Access	Active
☐ contact2		contact2@test.com					(UTC-12:00) Internatio...	☐	☒
☐ contact1		contact1@test.com					(UTC-12:00) Internatio...	☐	☒
☐ 137-Ent		137-Ent@irely.com				137-Ent Location	(UTC-11:00) Coordina...	☒	☒

3. Select and open the contact record to have portal access

Entity Contact - contact2

New Save Delete Undo Close

Detail CRM Information Audit Log (1) Additional Information

Full Name: contact2

Email (username): contact2@test.com

Title:

Country: Philippines

Timezone: (UTC-12:00) International Date Line West

Phone:

Mobile:

Contact Method:

Location Name:

Department:

Type:

Email Distribution:

Active: ☒

Notes:

User Portal Settings

☐ Change Password ☐ Email Login

Portal Access: ☐ User Role:

Username: contact2@test.com

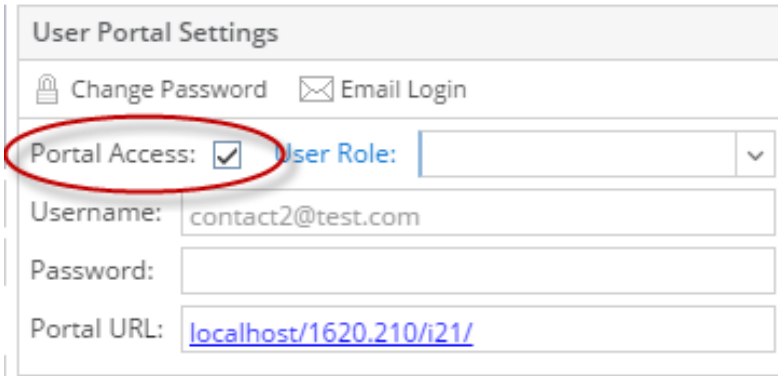
Portal URL: localhost/1620.210/21/

Contact Information

+ Insert X Remove Types

☐ Type Details

4. Tick the **Portal Access** check box to enable selection of **Contact Role**



The screenshot shows the 'User Portal Settings' form. The 'Portal Access' checkbox is checked and circled in red. The 'User Role' dropdown is empty. The 'Username' field contains 'contact2@test.com', the 'Password' field is empty, and the 'Portal URL' field contains 'localhost/1620.210/i21/'.

User Portal Settings

Change Password Email Login

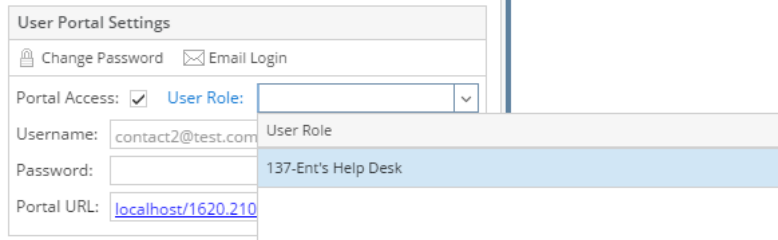
Portal Access: ☒ User Role: ▼

Username: contact2@test.com

Password:

Portal URL: localhost/1620.210/i21/

5. Select a user role for the contact



The screenshot shows the 'User Portal Settings' form with the 'User Role' dropdown menu open. The dropdown list shows '137-Ent's Help Desk' as the selected option. The 'Portal Access' checkbox is checked, and the 'Portal URL' field contains 'localhost/1620.210'.

User Portal Settings

Change Password Email Login

Portal Access: ☒ User Role: ▼

Username: contact2@test.com User Role

Password:

Portal URL: localhost/1620.210

137-Ent's Help Desk

6. Enter a password for the contact



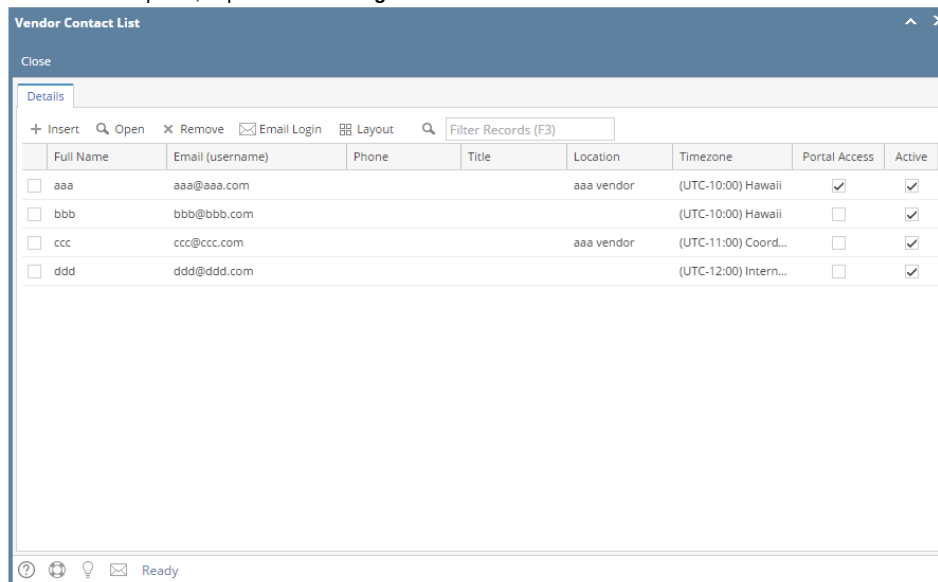
The screenshot shows a 'Password:' label followed by a text input field containing four asterisks (****).

Password: ****

7. Click **Save** button

To Assign Portal Access by Portal Admin:

1. Log in as Portal Admin
2. On user's menu panel, expand **Purchasing/Sales** then select **Vendor Contact List**



The screenshot shows the 'Vendor Contact List' window. It has a 'Details' tab and a table with columns: Full Name, Email (username), Phone, Title, Location, Timezone, Portal Access, and Active. There are four rows of data, each with a checkbox in the first column. The 'Portal Access' column has checkboxes, and the 'Active' column has checkboxes.

Vendor Contact List

Close

Details

+ Insert Open Remove Email Login Layout Filter Records (F3)

	Full Name	Email (username)	Phone	Title	Location	Timezone	Portal Access	Active
☐	aaa	aaa@aaa.com			aaa vendor	(UTC-10:00) Hawaii	☒	☒
☐	bbb	bbb@bbb.com				(UTC-10:00) Hawaii	☐	☒
☐	ccc	ccc@ccc.com			aaa vendor	(UTC-11:00) Coord...	☐	☒
☐	ddd	ddd@ddd.com				(UTC-12:00) Intern...	☐	☒

Ready

3. Select and open the contact record to have portal access

Entity Contact - bbb

New Save Refresh Delete Undo Close

Detail Audit Log (3) Ent 1

Full Name: bbb

Email (username): bbb@bbb.com

Title:

Phone: Mobile:

Timezone: (UTC-10:00) Hawaii

Contact Method:

Location Name:

Department:

Type:

Email Distribution:

Active: ☒

User Portal Settings

Change Password Email Login

Portal Access: ☐ User Role:

Username: bbb@bbb.com

Password:

Portal URL: localhost/1610.228/i21/

Contact Information

+ Insert X Remove Types

Type	Details	
Contact Role 1	aaa vendor's Help Desk	View

4. Tick the **Portal Access** check box to enable selection of **Contact Role**

User Portal Settings

Change Password Email Login

Portal Access: ☒ User Role:

Username: bbb@bbb.com

Password:

Portal URL: localhost/1610.228/i21/

5. Select a user role for the contact

User Portal Settings

Change Password Email Login

Portal Access: ☒ User Role: aaa vendor's Help Desk

Username: bbb@bbb.com

Password:

Portal URL: localhost/1610.228/i21/

User Role

aaa vendor's Help Desk

Contact Role 1

Contact Role 2

6. Enter a password for the contact

Password: ****

7. Click **Save** button

To Assign Portal Access by Internal User:

1. Log in as an Admin/internal user

2. Open an entity record, then open the Contacts tab

Name	Email (username)	Title	Phone	Mobile	Location Name	Timezone	Portal Access	Active
ddd	ddd@ddd.com					(UTC-12:00) Internatio...	☐	☒
ccc	ccc@ccc.com				aaa vendor	(UTC-11:00) Coordina...	☐	☒
bbb	bbb@bbb.com					(UTC-10:00) Hawaii	☐	☒
aaa	aaa@aaa.com				aaa vendor	(UTC-10:00) Hawaii	☒	☒

3. Select and open the contact record to have portal access

Full Name: ccc

Email (username): ccc@ccc.com

Title:

Phone: Mobile:

Timezone: (UTC-11:00) Coordinated Universal Time-11

Contact Method:

Location Name: aaa vendor

Department:

Type:

Email Distribution:

Active: ☒

Notes:

User Portal Settings

Change Password Email Login

Portal Access: ☒ User Role:

Username: ccc@ccc.com

Password:

Portal URL: localhost/1610.228/i21/

Contact Information

+ Insert X Remove Types

Type	Details

4. Tick the **Portal Access** check box to enable selection of **Contact Role**

User Portal Settings

Change Password Email Login

Portal Access: ☒ User Role:

Username: ccc@ccc.com

Password:

Portal URL: localhost/1610.228/i21/

5. Select a user role for the contact

User Portal Settings

Change Password Email Login

Portal Access: ☒ User Role: aaa vendor's Help Desk

Username: ccc@ccc.com

Password:

Portal URL: localhost/1610.228

User Role

aaa vendor's Help Desk

Contact Role 1

6. Enter a password for the contact

Password: ****

7. Click **Save** button

1. Open an existing Entity record

2. Navigate to **Contacts** tab
3. In the grid area, select the contact then click the **Open** button.

Entity	Vendor	Split	Firm	Ship Via	Locations	Contacts	Comments (0)	History	Attachments (0)	Audit Log (4)
✓ Name										
✓ 116-Ent						beth.delapaz@irely.com			123-456	012133
									116-Ent Location	(UTC-11:00) Coor...
									Portal Ace...	Active

4. Select and open the contact record to have portal access

Entity Contact - 116-Ent

New Save Refresh Delete Undo Close

Detail Audit Log (2)

Full Name: 116-Ent

Email (username): beth.delapaz@irely.com

Title:

Phone: 123-456 Mobile: 012133

Alt Phone: 789-012 Alt Email:

Contact Method: Fax: 789-012

Location Name: 116-Ent Location

Active: ☒ Department:

Portal Access: ☒ Timezone: (UTC-11:00) Coordinated Universal Time-11

Type:

Notes:

Email Distribution:

5. Tick the **Portal Access** check box to enable selection of **Contact Role**

Contact Role:

Active: ☒ Department:

Portal Access: ☒ Timezone: (UTC-11:00) Coordinated Universal Time-11

6. Select a user role for the contact

Contact Role: Help Desk

Active: ☒ Department:

Portal Access: ☒ Timezone: (UTC-11:00) Coordinated Universal Time-11

7. Click **Save** button to save the set up

8. This message will show after saving the contact

