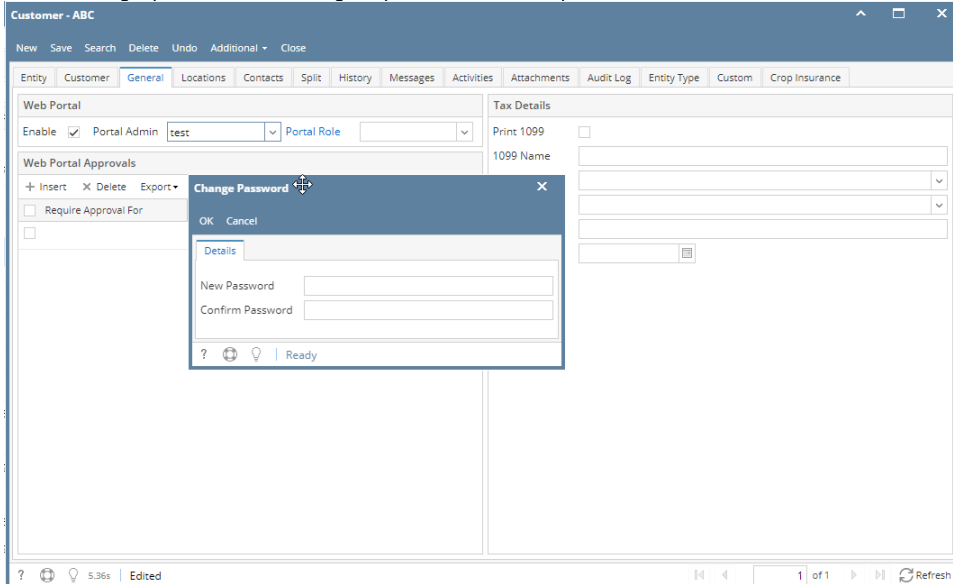# How to Assign a Portal Admin

**Pre-requisite:** There should be an email address before you can assign a Portal Admin:
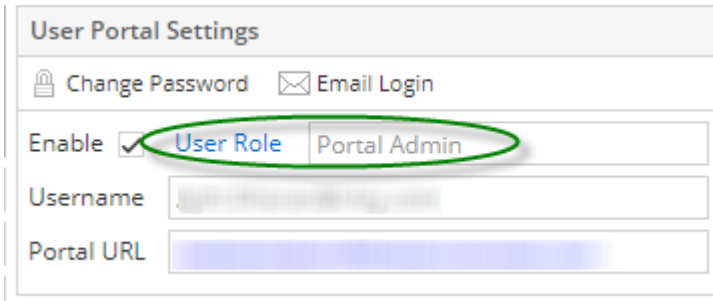**Here are the steps on how to assign a Portal Admin:**

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.



*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.**



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**



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.



   *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



4. Select a Portal Admin from the drop down



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



   Note: If Change Password is cancelled, portal access will be removed.
6. Click the **Save** button.