

Description

Provides the ability to create a Portal User from a Contact.

Version: v7+

Installation

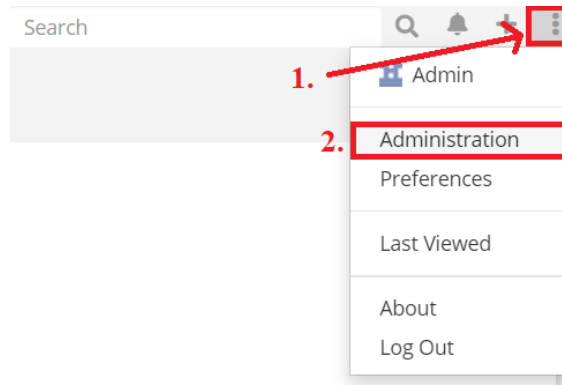
In order to install EspoCRM extension:

1. Login as an administrator.
2. Go to Administration > Extensions.
3. Upload your extension package (zip file).
4. Click Install button.





You can find more information here: <https://docs.espocrm.com/administration/extensions/>

Setting up a Contact layout

1. Go to the administrator panel.



2. Go to the Entity Manager section.

Customization	
 Entity Manager	Create and edit custom entities. Manage fields and relationships.
 Layout Manager	Customize layouts (list, detail, edit, search, mass update).
 Label Manager	Customize application labels.
 Template Manager	Customize message templates.



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3. Click on Contact entity.

Administration > Entity Manager

+ Create Entity

Search

Name	Label	Type
Account	Account	
Call	Call	
Campaign	Campaign	
Case	Case	
Contact	Contact	
Document	Document	

4. Click on Layouts button.

Administration > Entity Manager > Contact

⚙ Edit

Name
Contact

Label
Contact

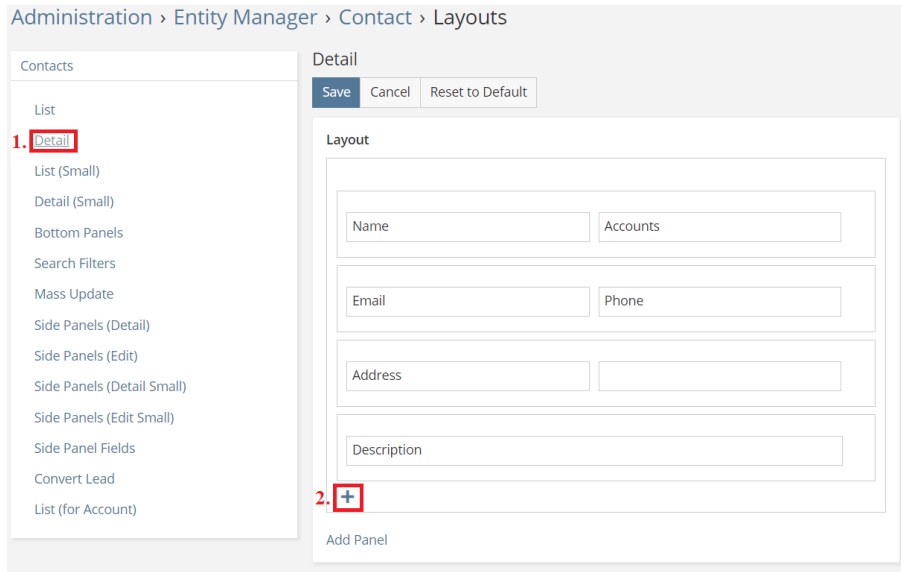
* Fields

🔗 Relationships

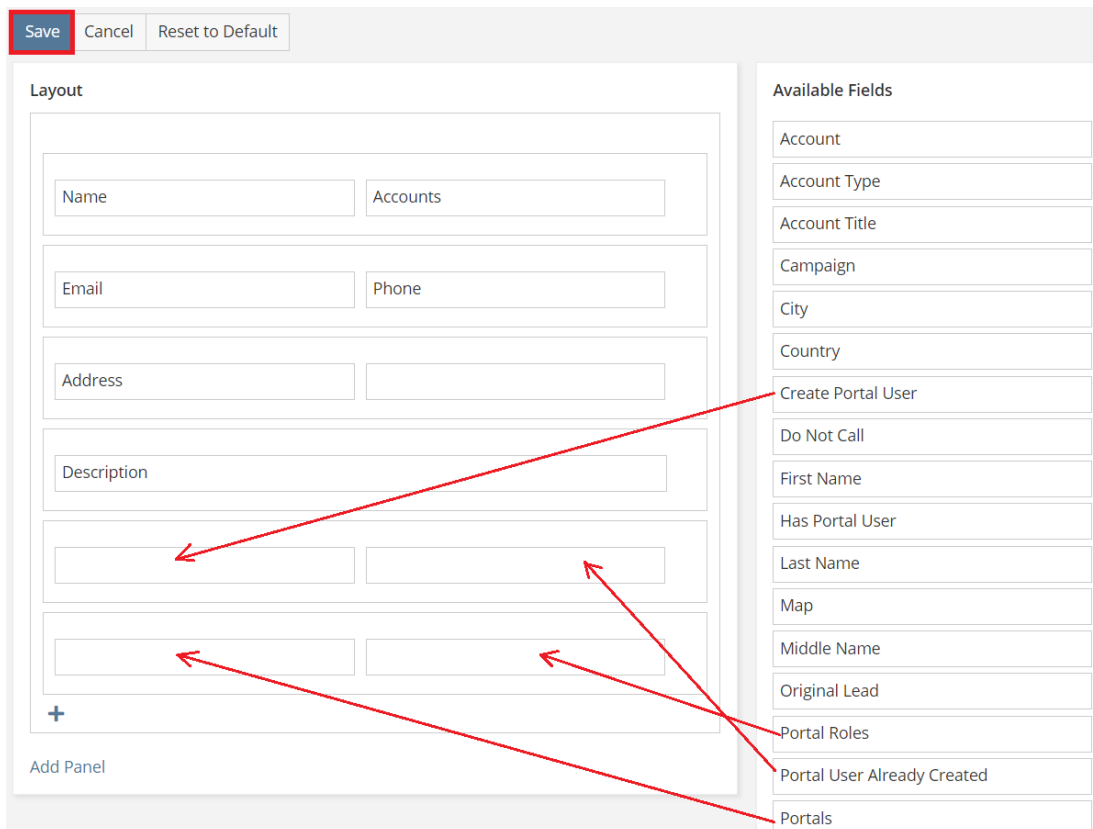
🗪 Layouts

</> Formula

5. Click on Detail tab and on + sign.

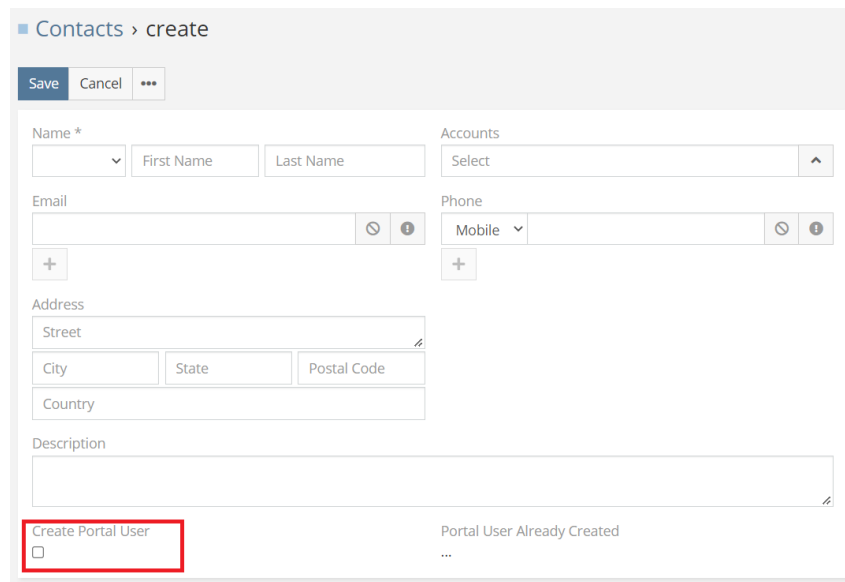


6. Drag and drop Create Portal User, Portal User Already Created, Portals, Portal Roles fields into empty spaces. Save it.



Creating Portal User from Contact

1. Tick on Create Portal User checkbox.



Contacts > create

Save Cancel ...

Name *
First Name Last Name Accounts
Select

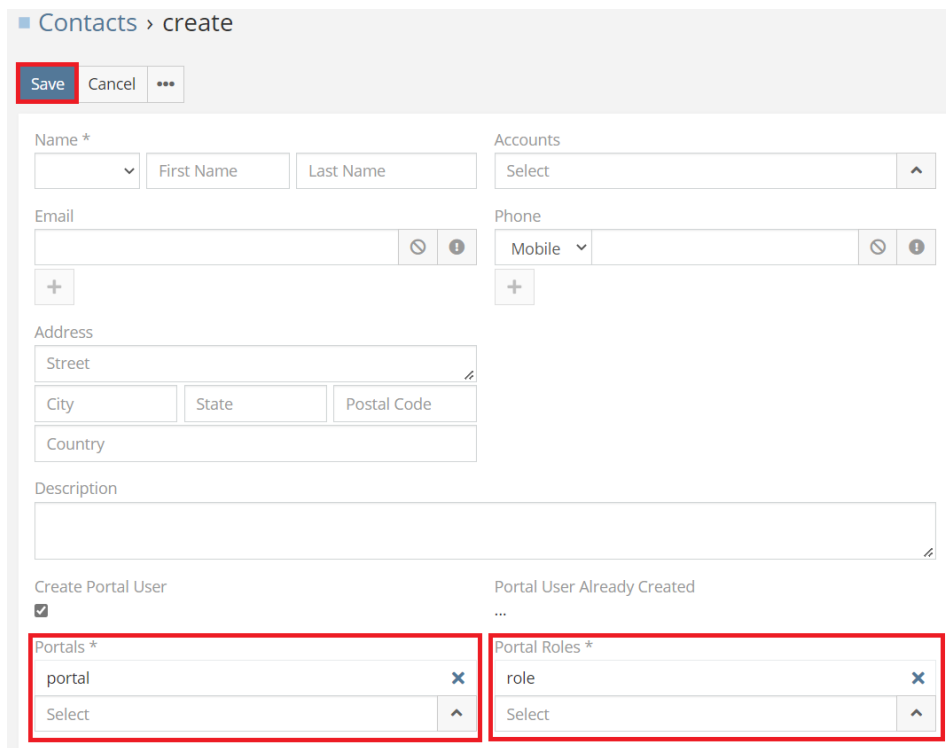
Email Phone
Mobile

Address
Street
City State Postal Code
Country

Description

Create Portal User Portal User Already Created ...

2. Fill in the form with requested data, choose Portal and Portal Roles. Save it.



Contacts > create

Save Cancel ...

Name *
First Name Last Name Accounts
Select

Email Phone
Mobile

Address
Street
City State Postal Code
Country

Description

Create Portal User Portal User Already Created ...


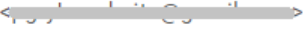
Portals *
portal
Select


Portal Roles *
role
Select



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3. Created Portal User will receive an email with log in information.


 **EspoCRM** 
skirta aš ▾

 Aptikti kalbą ▾ > lietuvių ▾ [Išversti pranešimą](#)

Your access information

Username: test.test

Password: 9f2gK7#85bXcfx

 [portal/6221db1aca8dfa64e](#)