



## Description

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

**Version:** v7+

## Installation

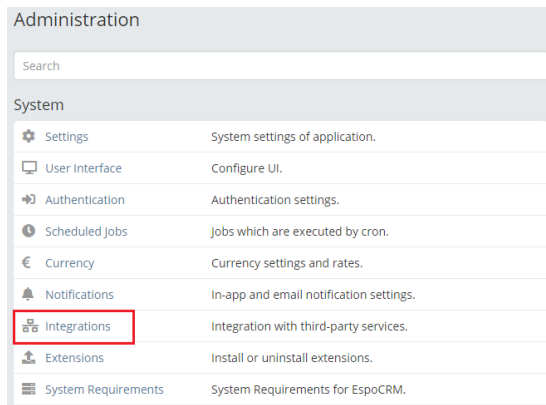
In order to install EspoCRM extension:

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

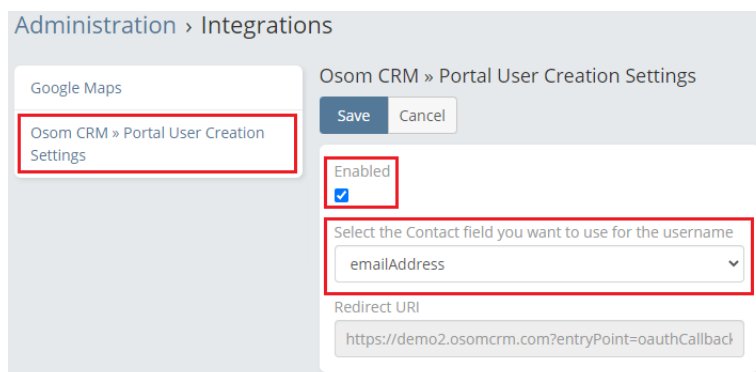
You can find more information here: <https://docs.espocrm.com/administration/extensions/>

## Setting up an Integration section

1. Go to the administration panel, then "Integrations".

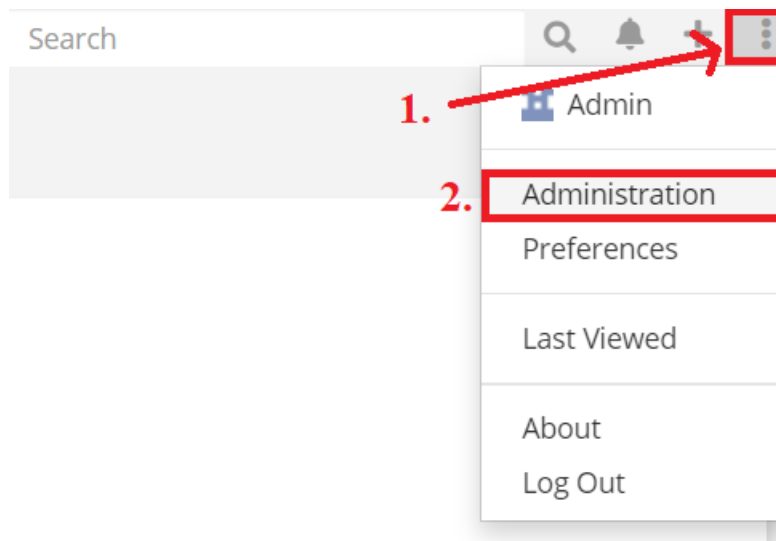


2. Choose "Osom CRM >> Portal User Creation Settings", click "Enable" checkbox and Select the field from Contact Entity you want to use for generating a Portal User's Username. Save it.

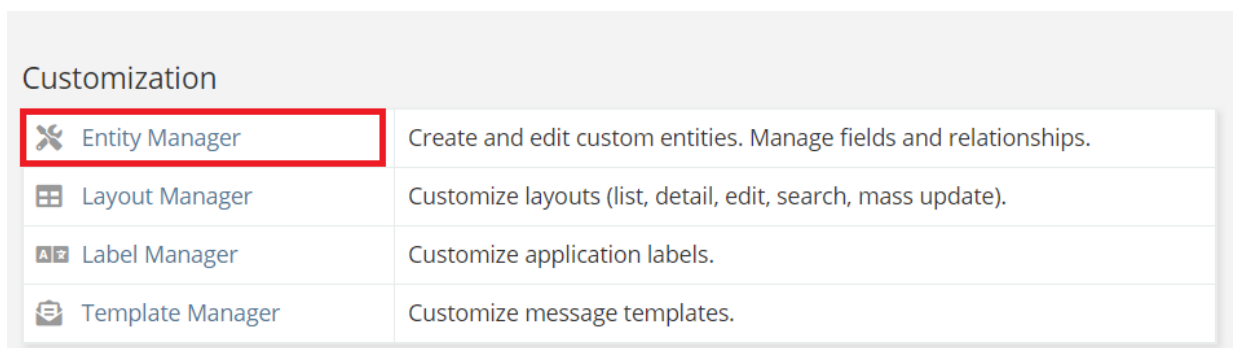


## Setting up a Contact layout

1. Go to the administration panel.



2. Go to the Entity Manager section.





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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

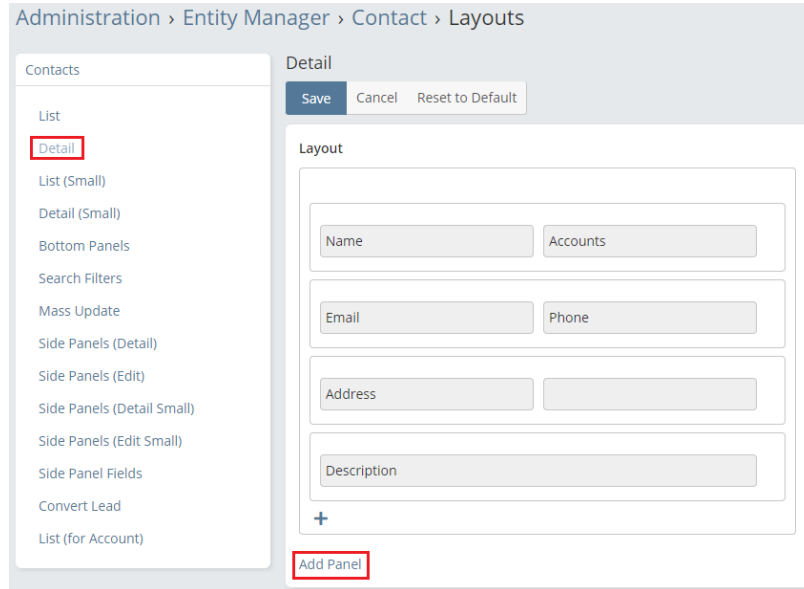
\* Fields

Relationships

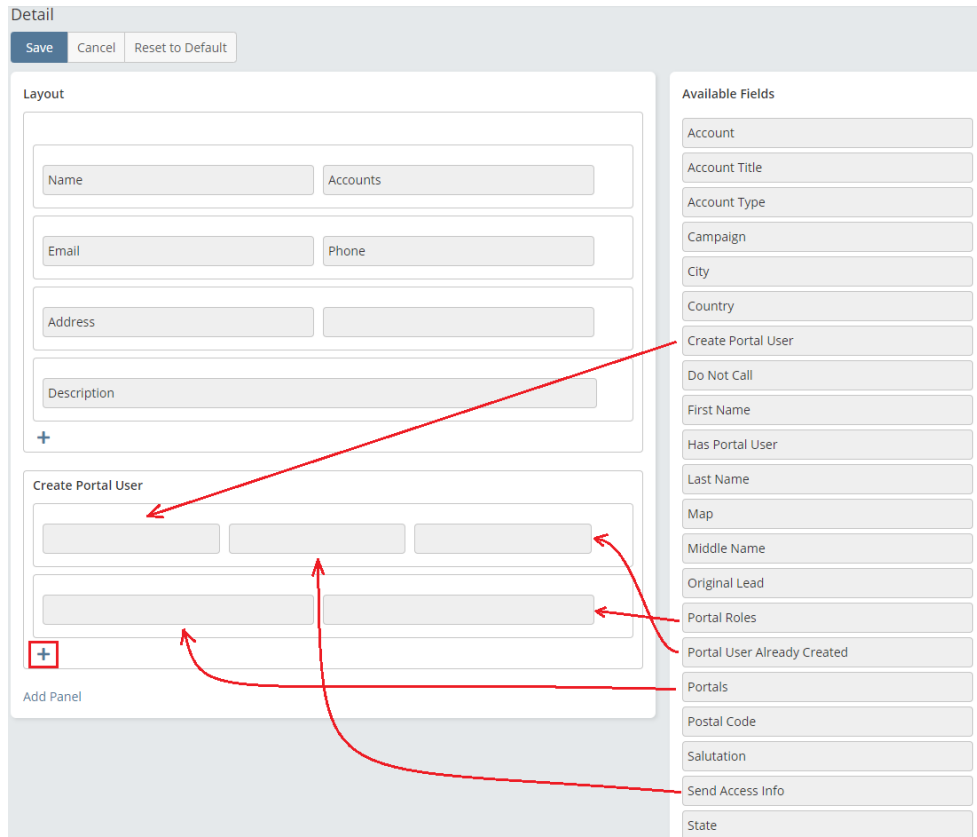
Layouts

</> Formula

5. Click on Detail tab, add Panel and add fields using "+" sign.

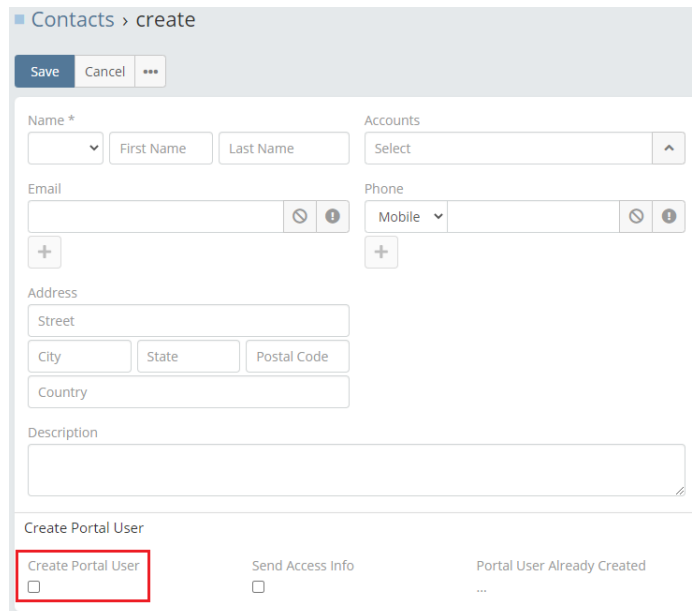


6. Drag and drop "Create Portal User", "Send Access Info", "Portal User Already Created", "Portals", "Portal Roles" fields into empty spaces. Save it.



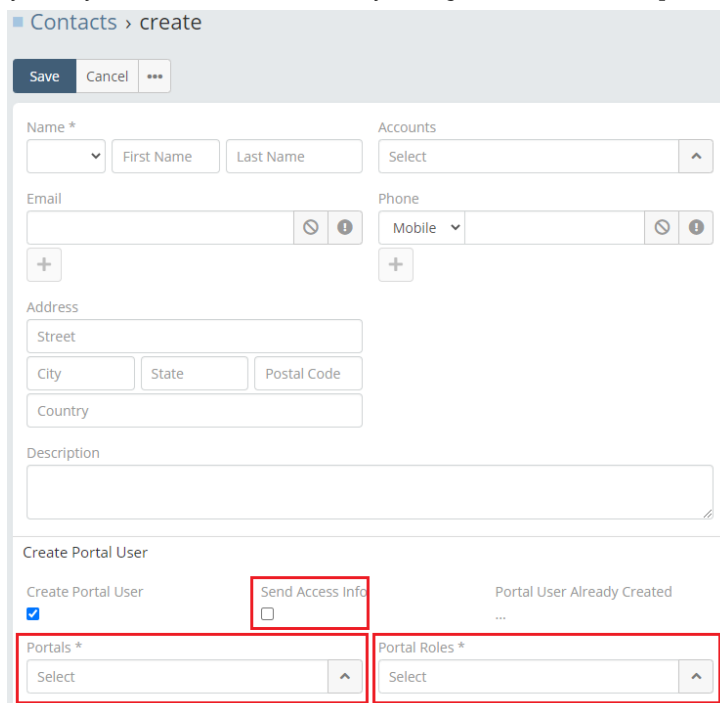
## Creating Portal User from Contact

1. Tick on "Create Portal User" checkbox.



The screenshot shows the 'Contacts > create' form. At the bottom, under the 'Create Portal User' section, the 'Create Portal User' checkbox is highlighted with a red box. Other checkboxes for 'Send Access Info' and 'Portal User Already Created' are also visible.

2. Fill in the form with requested data, choose "Portal" and "Portal Roles". Save it. At this moment Portal User will be created. You may also decide whether to send access data upon creation of Portal User or do it later. You can send access data later on and do it multiple times. However, every time you send access data, the system generates a link for password setting.



The screenshot shows the 'Contacts > create' form with the 'Create Portal User' checkbox checked. The 'Send Access Info' checkbox is highlighted with a red box. Below these, the 'Portals \*' and 'Portal Roles \*' dropdown menus are also highlighted with red boxes.



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3. Created Portal User will receive an email with username and a link where to set a password.

### Your access information

Username: [osom@osomcrm.com](mailto:osom@osomcrm.com)

<https://demo.osomcrm.com/portal/66df610fa3845b1c0/?entryPoint=changePassword&id=4def146dfceaf725e26ea6f56ab34c73>


## NOTES

- This Documentation explains how to create Portal Users by Admin.
- If you want to create Portal User by Regular user, you should give that user a "Portal Permission" right. In that user Role select "Portal Permission" to "yes".

Roles > Account/Contact

Edit ...

Name  
Account/Contact

Export Permission ⓘ not-set	User Permission ⓘ not-set	Assignment Permission ⓘ not-set
<b>Portal Permission ⓘ yes</b> 	Group Email Account Permission ⓘ not-set	Data Privacy Permission ⓘ not-set
Mass Update Permission ⓘ not-set	Follower Management Permission ⓘ not-set	

Scope Level


	Access	Create	Read	Edit	Delete	Stream
Accounts	enabled	yes	all	all	all	

- When Regular user will create a Portal User he will be able to choose only Portal. Portal Roles is not allowed for Regular users. In this case, the Portal Role should be assigned to the Portal itself.

Portals > portal

Edit ...

General

Name portal	Is Active <input checked="" type="checkbox"/>
URL <a href="https://osomcrm.com/portal/">https://osomcrm.com/portal/</a>	Is Default <input checked="" type="checkbox"/>
<b>Roles role</b> 	Custom ID None
Authentication Provider None	Custom URL None