

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.

Administration > Integratio	ns
Google Maps Osom CRM » Portal User Creation Settings	Osom CRM » Portal User Creation Settings
	Save Cancel
	Enabled
	Select the Contact field you want to use for the username
	emailAddress 🗸
	Redirect URI
	https://demo2.osomcrm.com?entryPoint=oauthCallback



Setting up a Contact layout

1. Go to the administration panel.



2. Go to the Entity Manager section.

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



3. Click on Contact entity.

Administration > Entity Manager				
+ Create Entity				
Search				
Name	Label	Туре		
Account	Account			
Call	Call			
Campaign	Campaign			
Case	Case			
Contact	Contact			
Document	Document			

4. Click on Layouts button.

Administration > Entity Manager > Contact				
Name Contact Label Contact				
★ Fields Formula	𝔗 Relationships	Layouts		



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

ntacts	Detail	
ist	Save Cancel Reset to Default	
Detail	Layout	
List (Small)		
Detail (Small)		
Bottom Panels	Name	Accounts
Search Filters		
Mass Update	Email	Phone
Side Panels (Detail)		
Side Panels (Edit)		
Side Panels (Detail Small)	Address	
Side Panels (Edit Small)		
Side Panel Fields	Description	
Convert Lead		

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

Cancel Reset to Def	ault	
yout		Available Fields
		Account
Name	Accounts	Account Title
		Account Type
Email	Phone	Campaign
		City
Address		Country
		Create Portal User
Description		Do Not Call
Description		First Name
F		Has Portal User
eate Portal User		Last Name
~		Мар
		Middle Name
		Original Lead
K		Portal Roles
) E		Portal User Already Created
Panel		Portals
		Postal Code
		Salutation
		Send Access Info



Creating Portal User from Contact

1. Tick on "Create Portal User" checkbox.

Contacts > create	
Save Cancel •••	
Name * V First Name Last Name	Accounts Select
Email	Phone
+ Address	Mobile V V
Street City State Postal Code	
Country	
Description	
Create Portal User Create Portal User Send Access Info	Portal User Already Created

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.

Contacts > create		
Save Cancel •••		
Name *	Accounts	
← First Name Last Name	Select	^
Email	Phone	
0	Mobile 🗸 🛇	0
+	+	
Address		
Street		
City State Postal Code		
Country		
Description		
		li
Create Portal User		
Create Portal User Send Access Info	Portal User Already Created 	
Portals *	Portal Roles *	
Select	Select	^



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

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 crate 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							
Name Account/Contact							
Export Permission 🛈 not-set	User Permission 6 not-set			Assignment Permission () not-set			
Portal Permission Group Email Account yes not-set		nt Permission		Data Privacy Permission 🔀 not-set			
Mass Update Permission 6 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
URL	Is Default
Roles role	Custom ID None
Authentication Provider None	Custom URL None