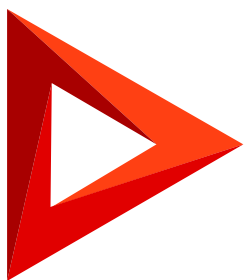


Manage Portal in the profile

Manage Portal Creatio via the portal organization profile

Version 8.0



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Manage Portal Creatio via the portal organization profile

PRODUCTS: ALL CREATIO PRODUCTS

This article covers how a portal administrator can manage portal users and their access permissions. Primary Creatio application administrators can manage users and access permissions on the portal as well. Learn more: [Manage Creatio Portal in the main application](#).

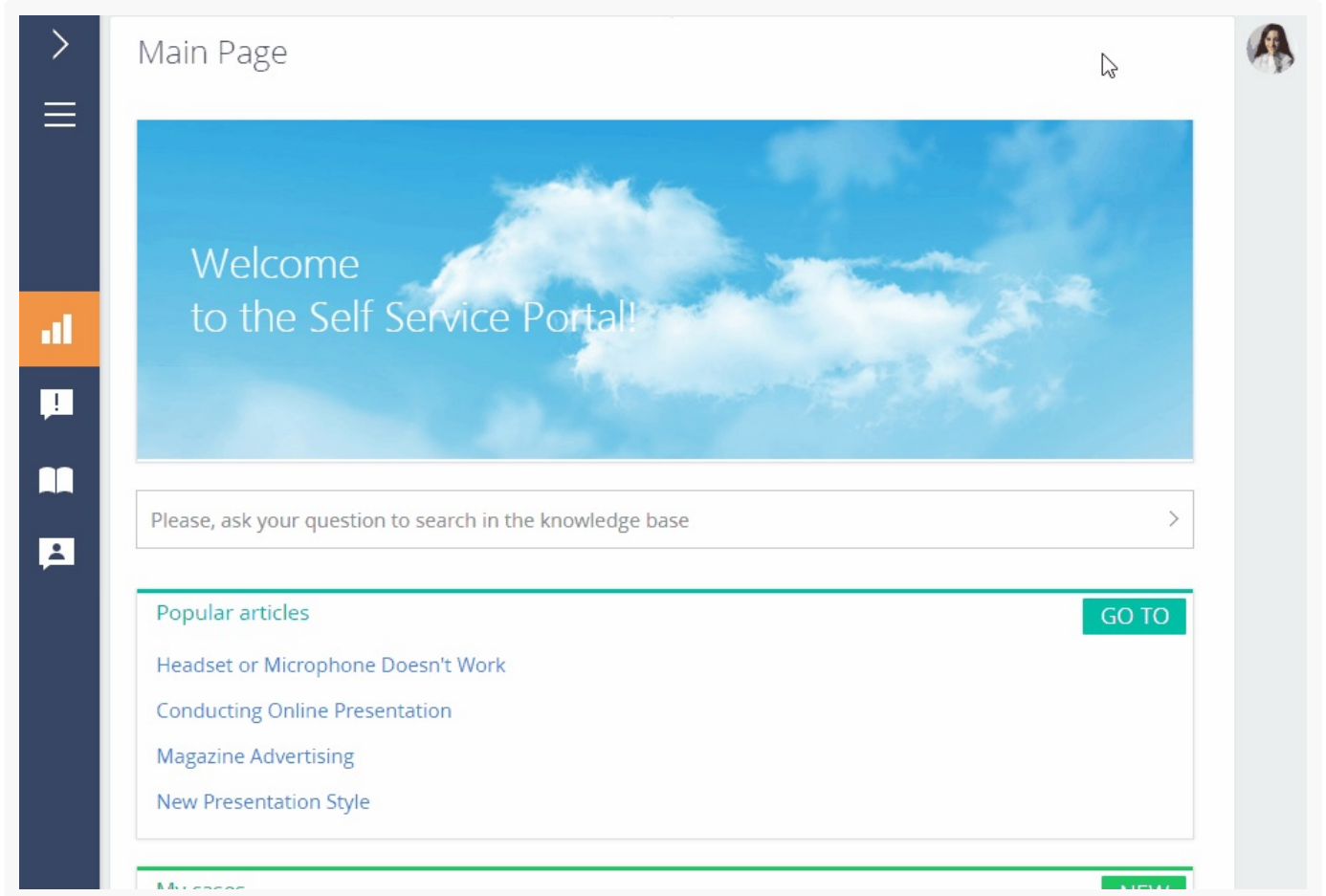
Add portal users

To add new portal users:

1. Click your profile picture in the top right → [*Organization profile*].
2. Go to the [*Portal users*] detail → click + → enter the emails of the users to invite. Creatio validates any entered email automatically. Click [*Create portal users*] (Fig. 1).

If Creatio matches the entered emails to any existing contacts, it will add portal users linked to those contacts. If Creatio finds no matching contacts, they will be created automatically, based on the emails. For any new contacts, the [*Full name*] field will contain the email local part, i. e. the text before “@.”

Fig. 1 Adding portal users as a portal administrator



3. Creatio will prompt you to send email invitations to the new portal users. You can close the prompt and send the invitations later.

As a result, new portal users will be added to the portal. The users will need to click the link in the invitation email to log in to the portal for the first time. Once on the portal, each user will be able to set a password.

Send invitations to portal users

You can invite new users to the portal. Potential users receive an email invitation with a one-time link they can use to access the portal for the first time and set up their password.

Note. The email integration must be set up, and a valid mailbox must be specified in the “SSP registration mailbox” (“SSPRegistrationMailbox” code) [system setting](#) in the primary Creatio application for you to be able to send email invitations. Learn more: [Working with emails](#).

If a new portal user forgets to set their password after the first login, you will need to re-send the invite. To do this:


1. Select the needed users in the [*Portal users*] detail.
2. Click  and select [*Send invites*] (Fig. 2):

Fig. 2 Send a portal invitation

Alpha Business

Account* Alpha Business

Primary phone +1 (212) 1542 4236

PORTAL USERS

Portal users + :

Name	Administrator for organization	Active
<input type="checkbox"/> Kate Roberts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> russel@np.com Jane Russel	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> a.wilson@alphabusiness.com Alexander Wilson	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> j.anderson@yahoo.com Jordan Anderson	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> samuelmelendrez@g samuelmelendrez	<input type="checkbox"/>	<input type="checkbox"/>

Set up access permissions for portal users

You can grant permissions to other portal users within your organization.

To assign the invited user all functional roles available to the organization:

1. Click your profile picture in the top right → [*Organization profile*].
2. Go to the [*Portal users*] detail → click + → enter the emails of the users to invite.
3. In the user registration window, select the roles to assign to the invited users (Fig. 3). Click [*Create portal users*].

In this example, the users will obtain all permissions of the portal administrator, as well as permissions assigned to the “Portal managers” role.

Fig. 3 Assign permissions to the new portal users

Create portal users

Create new portal users by adding their email addresses below. After adding the new users you will be able to send portal invitations to their email addresses. The new portal users will be able to log in using these email addresses as user names

Email addresses

russel@np.com ×
samuelmelendrez@gmail.com ×

Select additional permissions that will be granted to the new portal users:

Administrator for organization on the portal

CREATE PORTAL USERS
CANCEL

You can assign roles to the existing users as well. The list of available roles is shown on the [*Portal users*] detail (Fig. 4).

Fig. 4 The portal user roles

>
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<
PORTAL USERS
>

Portal users
+
⋮

Name	Contact	Administrator for organization...	Managers for organization on ...
Kate Roberts	Kate Roberts	<input checked="" type="checkbox"/>	<input type="checkbox"/>
russel@np.com	Jane Russel	<input checked="" type="checkbox"/>	<input type="checkbox"/>
a.wilson@alphabusiness.com	Alexander Wilson	<input type="checkbox"/>	<input checked="" type="checkbox"/>
j.anderson@yahoo.com	Jordan Anderson	<input type="checkbox"/>	<input checked="" type="checkbox"/>
samuelmelendrez@gmail.com	samuelmelendrez	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Promote a portal user to an administrator

You can grant portal administrator privileges to any user within your organization. To do this:

1. Click your profile picture in the top right → [*Organization profile*].
2. Go to the [*Portal users*] detail and select [*Administrator for organization on the portal*] checkbox (Fig. 5) for the users you want to assign administrator privileges.

Fig. 5 Assign the portal administrator privileges

The screenshot shows the 'Alpha Business' portal organization profile. The 'Portal users' section is expanded, displaying a table of users. The 'Administrator for organization on the portal' checkbox is checked for Kate Roberts and russel@np.com.

Name	Contact	Administrator for organization on the portal	Active
<input type="checkbox"/> Kate Roberts	Kate Roberts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> russel@np.com	Jane Russel	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> a.wilson@alphabusine ss.com	Alexander Wilson	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> j.anderson@yahoo.co m	Jordan Anderson	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> samuelmelendrez@gm	samuelmelendrez	<input type="checkbox"/>	<input type="checkbox"/>

Deactivate portal users

Deactivate a portal user account to restrict the corresponding user from accessing the portal. To do this:

1. Click your profile picture in the top right → [*Organization profile*].
2. Go to the [*Portal users*] detail → clear the [*Active*] checkbox next to the users whom you want to deactivate (Fig. 6).

Fig. 6 Deactivate the portal users

Alpha Business

CLOSE

Account* Alpha Business

Primary phone +1 (212) 1542 4236

PORTAL USERS

Portal users + :

Name	Contact	Administrator for organization...	Active
Kate Roberts	Kate Roberts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
russel@np.com	Jane Russel	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
a.wilson@alphabusiness.com	Alexander Wilson	<input type="checkbox"/>	<input type="checkbox"/>
j.anderson@yahoo.com	Jordan Anderson	<input type="checkbox"/>	<input type="checkbox"/>
samuelmelendrez@gmail.com	samuelmelendrez	<input type="checkbox"/>	<input type="checkbox"/>

As a result, the user will be suspended and will not be able to access the portal. You can reactivate a user at any time.

Change the service information on the portal

The portal in Service Creatio, enterprise edition, lets you view all service agreements of your company. To do this, click your profile picture in the top right → [*Organization profile*] → [*Maintenance*] (Fig. 7).

Fig. 7 The company's service agreements

Alpha Business

[CLOSE](#)

Name* Alpha Business Primary contact Alexander Wilson
 Primary phone +1 (212) 1542 4236

< PORTAL USERS MAINTENANCE >

Services

Service agreements

Number	Title	Status	Service contract
2	2 — Alpha Business	Active	2 — Alpha Business
38	38 — Alpha business	Active	38 — Alpha business
73	73 — Alpha business	Active	73 — Alpha business

Addresses

Address type	Country	State/province	City
Actual	United States	New York	New York
Shipping	United States	New York	New York

You can add, modify and delete your company's addresses (actual, legal and shipping) as well. All changes must be saved.