



Adding, changing roles, and removing users from Portal

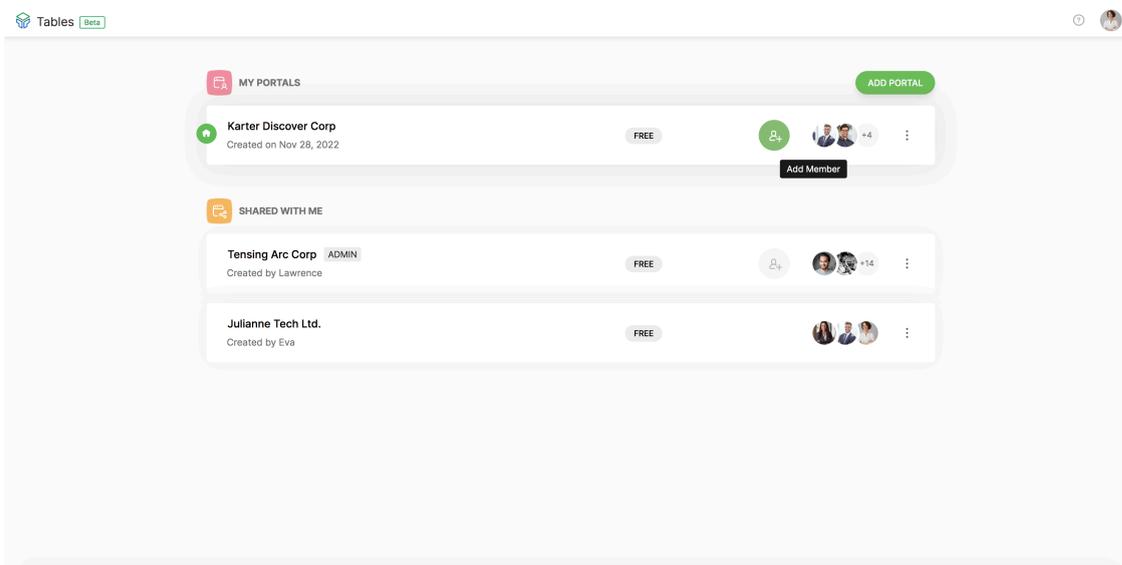
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You can add users that are part of your organization to your Portal/ Workspace/Base based on the access permission which you deem fit for them. If you want to work with someone within Zoho Tables, you can add someone to the Portal, Workspace, or the Base as a [Manager, Editor, or a Viewer](#). A manager has access to all of the bases in a workspace, while an editor has access to only the bases shared with them within a workspace.

Adding member and setting up roles in a Portal

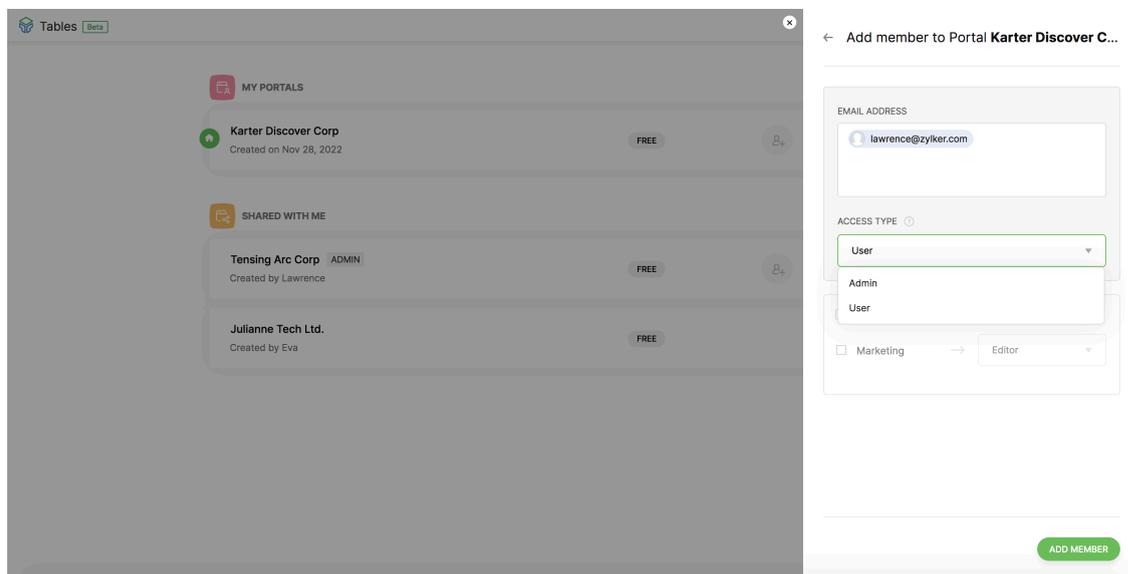
Go to the Portal home page using the **Manage Portal** option, and click on the **+ Add Member** icon.



Enter the email address of the users you need to add to the Portal. Add the necessary users, and proceed to configure the Access Type.

Two types of access are available:

- Admin - full access to all workspaces & bases of that Portal and manage portal users
- User - Restricted access to one or more Workspaces of that Portal

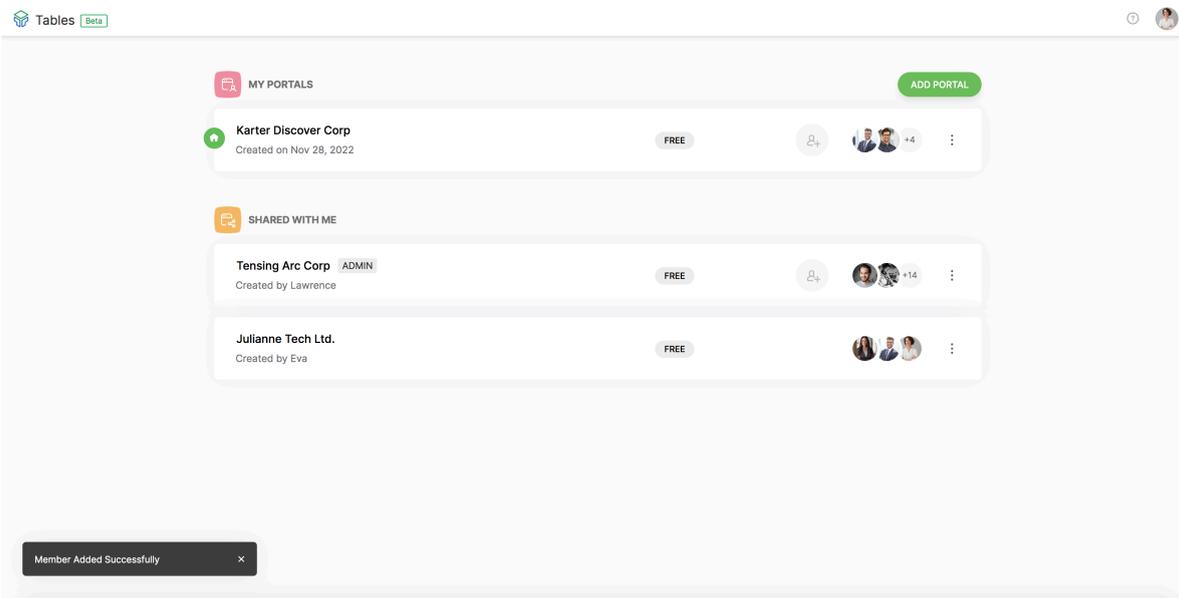


Note: Admin can fully access all the Workspaces and Bases of the Portal.

You can also choose a workspace to which the user will be added and additionally set roles. Select the **Choose workspaces to add users & set roles** checkbox. Select the workspace to which the user must be added from the list, and set the role. Roles available are: Manager, Editor, and Viewer.

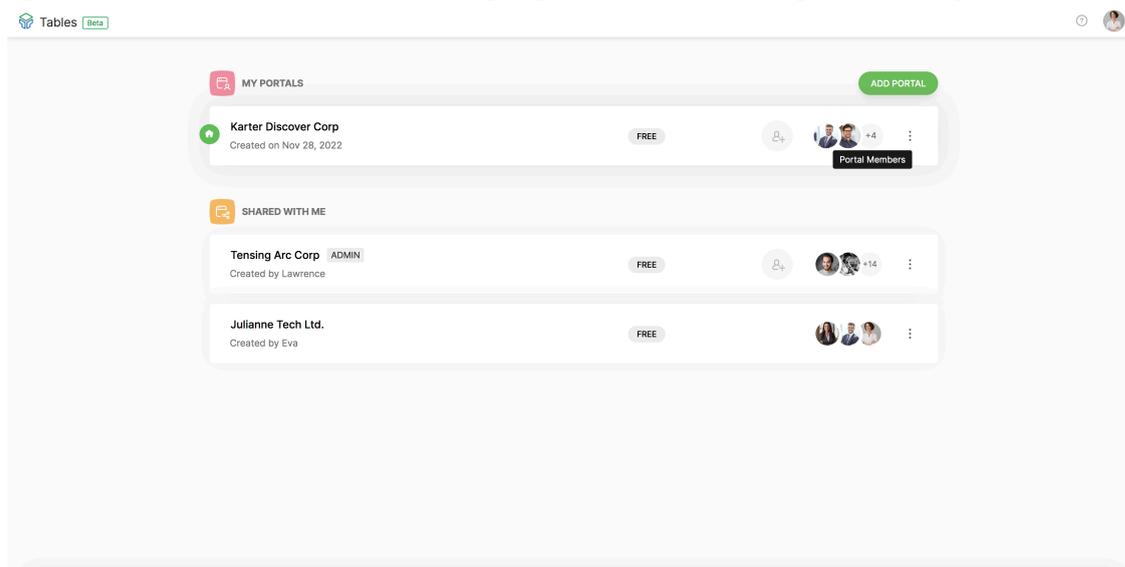
Once done, click on the **ADD MEMBER** option. You will get a notification stating that the member was added successfully.

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To check if the user is added to the Portal, click on the **Portal members icon** on your Portal. The members in your portal will be listed.

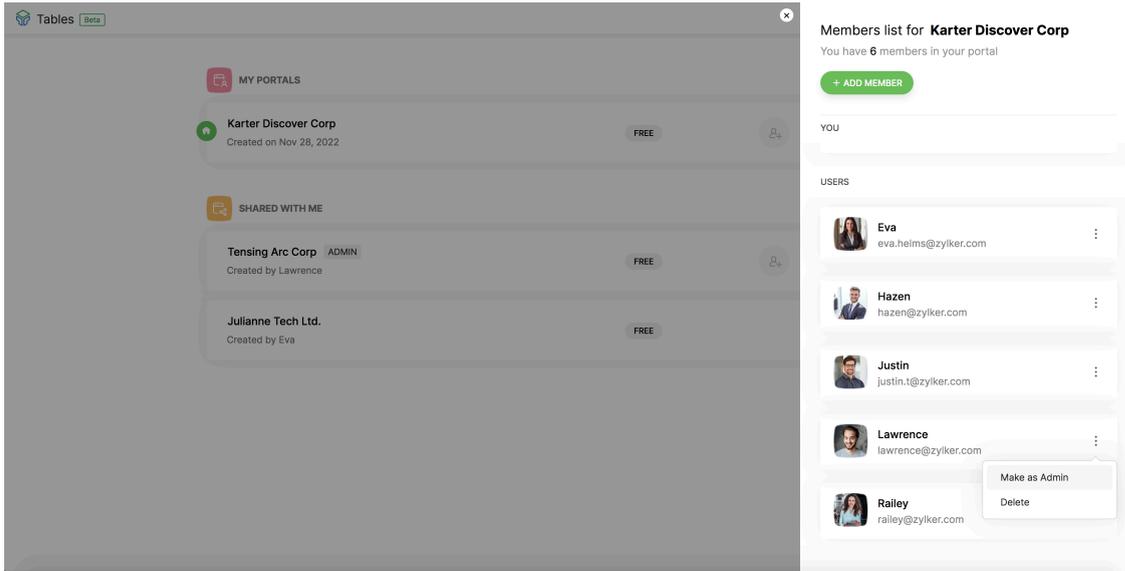
<portal members icon needs to be highlighted or a GIF to explain the step is needed>



To change the existing role of a User in a Portal

- Navigate to the **Portal page**.
- Click on **the Portal Members** option, and click the **More Options** button from the users list.
- Choose **Make as Admin** or **Make as User** to change from User to Admin or Admin to User.

Note: When an Admin is switched to a user, you may have to choose workspaces and specify roles for their controlled access.



Removing a User from a Portal

Anyone with the capacity to manage roles can remove the user from your Portal.

To remove a user from the Portal,

- Go to the **My Portals** page and click the **Portal Members** option.
- You can see the list of users in your Portals. Select the **More Options** button near the user you want to delete.
- Click the **Delete** option.

