

User Management : Portals & Workspaces

Zoho LandingPage offers dual levels of user management: portal-level and workspace-level. At the broad level, portal owners and portal admins control access across the entire portal. At a more specific level, workspace managers can choose the users for the individual workspaces. This dual-level approach ensures a streamlined, flexible, and collaborative user experience across the platform.

Inviting a user to your portal/workspace

Portals are designed to facilitate the management of multiple workspaces. Workspaces are collaborative spaces where individuals within an organization can work together on landing page campaigns. When inviting users you can either add them as portal admins or members to selected workspaces. To ensure a seamless and secure environment, LandingPage offers various <u>types of access</u> that admins can choose from for their collaborators.

1. Click on the **Settings** icon in the top right corner to access the settings menu.

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All Pages (62)			Page Name	Status	Visitors	Conversions	Conversion Rat	te	
Blog			Landing Page 01 Last Updated on Jun 18, 2024	Published	11	2	18.18 %	:	
May - June									
Ecommerce			Zylker Properties Last Updated on Mar 01, 2024	Published	548	43	7.85 %	:	
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In the settings menu, click on the users tab to view and manage the users in your portal. Click on Invite Users to invite users to your portal.

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8) Users -				
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√ IP Filtering	Darren Pearce			
Zia Content	darrenpearce@zylker.com	Portal Admin	:	
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Only portal owners and portal admins are allowed to invite users to any workspace in the portal and grant portal admin access. Workspace managers can only invite users to their particular workspace.

Enter the email address of the user and select the type of access for the particular user. One can either opt for **Portal Admin** access which gives the user access to all the workspaces in the portal or **Member** Access and select the access type for each workspace individually. Finally, click **Invite User** to add the user to the portal.

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Inv	ite User to Zylker					
	Email Address kevin@zylker.com × Add another mail ID					
	Portal Access					
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	Workspace Access					
	Alfred Workspace	\rightarrow	Viewer ^			
	Invite User		Viewer Preview pages and reports			
			Workspace Manager			
			Create and publish pages No Access			

4. Invited users can view the portal by clicking on their profile icon in the Zoho LandingPage workspace. Click on **Switch Portal** to access all your portals including invited portals.

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[]] Workspaces	Users in Zylker	Alfred alfred@zylker.com
8) Users	It's a team of 3	⑧ My Account
Domains	User Details	Access Type Working Portal
① Integrations	You	Zylker Switch Portal
C Files	alfred@zylker.com	Portal Owner Your Trial plan expires in 131 days. Upgrade Now
⑦ IP Filtering	Darren Pearce darrenpearce@zylker.com	Portal Admin
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☆ _A Language	K kevin@zylker.com YETTO ACCEPT	Member V
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		Follow us for latest updates!

5. Alternatively, users can also click on the LandingPage icon on the top left corner of their workspace *twice* to access the portals tab.

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All Pages (62)		Page Name	Status	Visitors	Conversions	Conversion Rate		
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Events								
Marketing								

6. Select the required workspace name from the list of portals under Invited Portals to access the invited workspace.

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	My Portals		
	Z Zylker Created by Alfred on Apr 11, 2023	:	
	Invited Portals		
	Kevin Workspace Me Created by Krithika I M on Mar 19, 2021 Me	MBER	
			?

Editing access type & removing a user

1. Once the user has been added to the portal, you can view them in the Users tab. Click on the three-dot menu beside the user name and click **Edit Access Type** to make changes to their access level.



Only portal owners can edit access type and remove users from their portal.

2. In the edit profile window, you can change the access type and click **Update** to apply the changes.

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	Edit Darren's profile		
	Email Address		
	darrenpearce@zylker.com		
	Portal Access		
	Member Access to selected Workspaces	Portal Admin Access to all Workspaces	
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	Alfred Workspace	→ Designer ∧]
	Update	Viewer Preview pages and reports	
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		Workspace Manager Create and publish pages	
		No Access	

3. In case you want to remove the user from the particular portal or workspace, click on **Remove User**.

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Workspaces	Users in Zylker It's a team of 2	දී Invite User	
 Users Domains 	User Details	Access Type	
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