Portal User Access Setup (Archived)

Important note

This article is archived. Please read a **new version of the article** about the Contact Manager Creation.

The **Form.com/Key Survey Mobile** respondent database is based on the Contact Managers which have been created in a Form.com or Key Survey account.

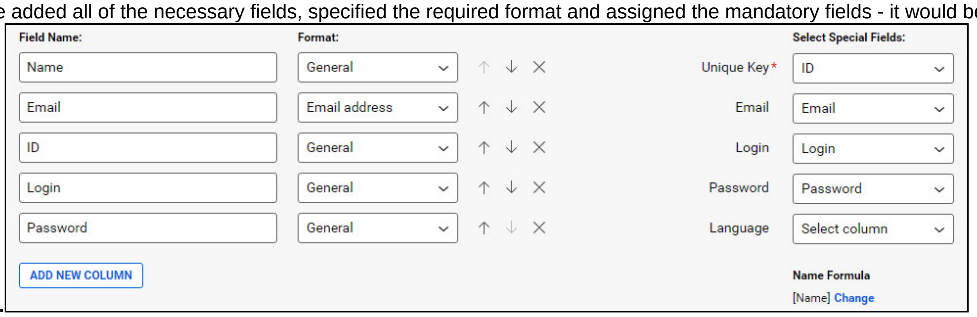
A new Contact Manager can be created from the **Contacts** page by clicking the **New** button and selecting **Contact Manager** from the dropdown.

1. Select the preferred creation method.
    - The **Create contact list by uploading file with data** option allows creating and adding batches of contacts to the Contact Manager.
    - The **Create list by manually editing fields** option allows creating Contact Manager fields manually.
2. Create the necessary fields.

    The **Contact Manager** must include the following **mandatory fields:**

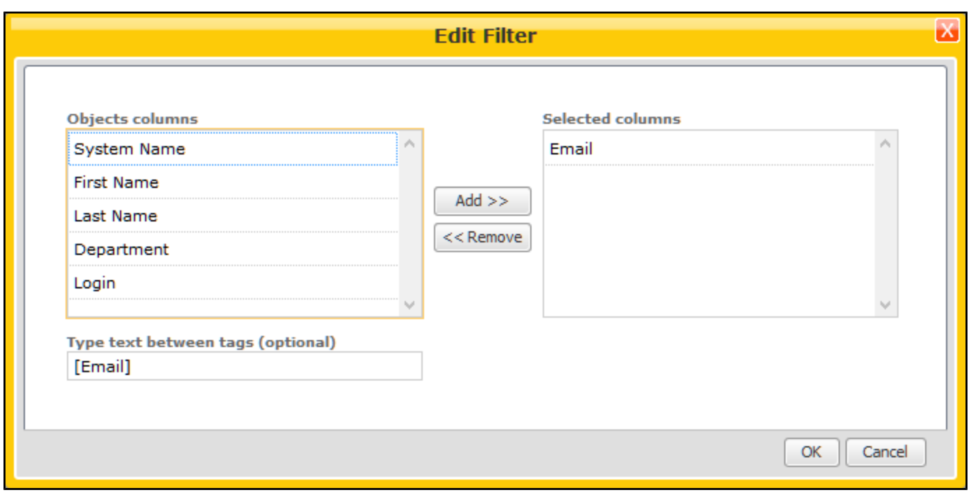
    - **Unique Key** – which will be used to store the contact identifier, which must be unique to each participant.
    - **Email Address** – which will be used to store the participant's email address.
    - **Login** – which will be used to store the participant's Username for access to the Online/Offline Portal as well as the Form.com/Key Survey Mobile application.
    - **Password** – which will be used to store the Password required for the participant to access the Online/Offline Portal as well as the Form.com/Key Survey Mobile application.
3. Select the field **Format** and indicate the field containing the **Unique Key**/**Email**.

    Once you have added all of the necessary fields, specified the required format and assigned the mandatory fields - it would be best to indicate the

    Name Format.

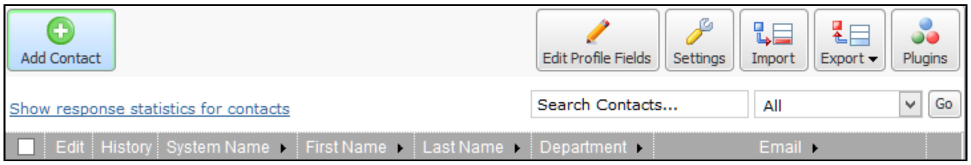
    It will not be possible to change the **Unique Key** field once contacts are created in the **Contact Manager**.
4. To view required details in the **Assigned to** column of the **Tasks** page, indicate the corresponding fields in the **Name Format** pop-up.

    The Name Format is used to specify the format of the assignee name which will be visible to the you in the **Assigned to:** column of the **Tasks** page.

    Once the **Contact manager fields** have been specified and the **Name Format** set, press the **Save** button.

5. Complete the profile data for each user.



In order to create additional contacts you can either manually input the details one by one or take advantage of the Import functionality.

If the required Contact Manager does not exist, it **must** be created by the Form/Survey owner or administrator.