



# Using Open Registration

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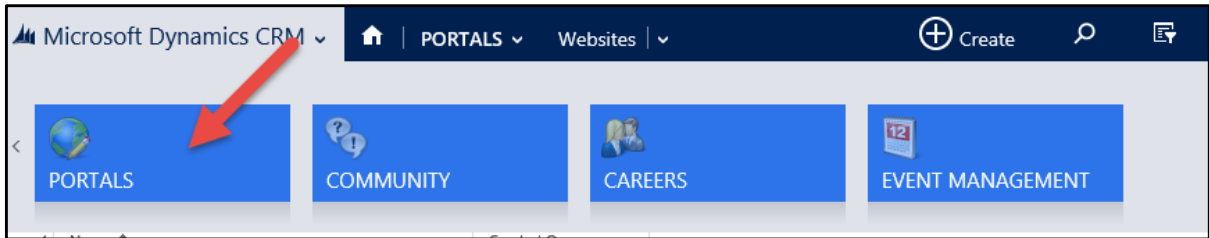
After completing this guide you will be able to sign up your web portal as a new user without an invitation code.

# How to Use Open Registration

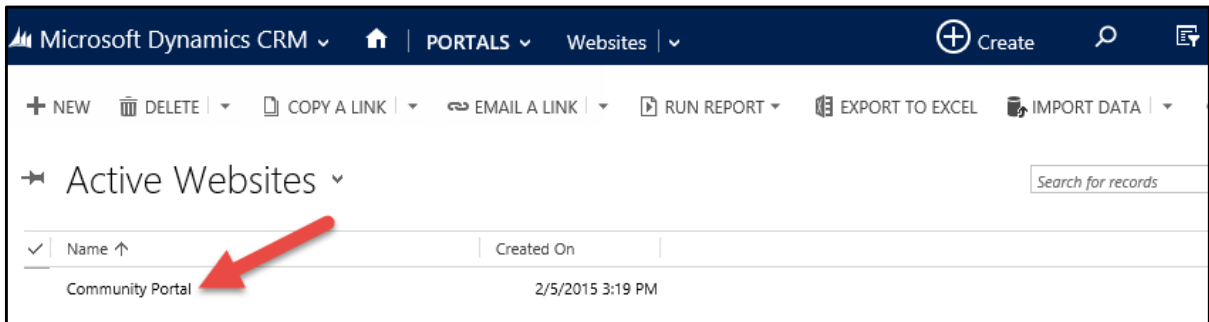
With open registration enabled, users are not required to provide an invitation code to complete the sign up process.

We will first make sure Open Registration is enabled and then we will create a new account.

- 1) In your Dynamics CRM, navigate to Portals.



- 2) Click to open your Portal.



- 3) In the Options section, Locate Site Settings and click to expand it.



## Using Open Registration

- Open Registration is enabled by setting Authentication/Registration/RequiresInvitation to false and Authentication/Registration/RequiresConfirmation to false.

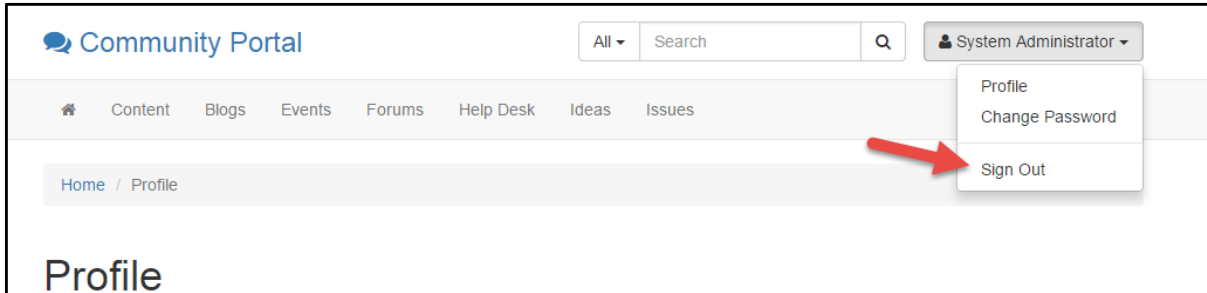


Site Settings

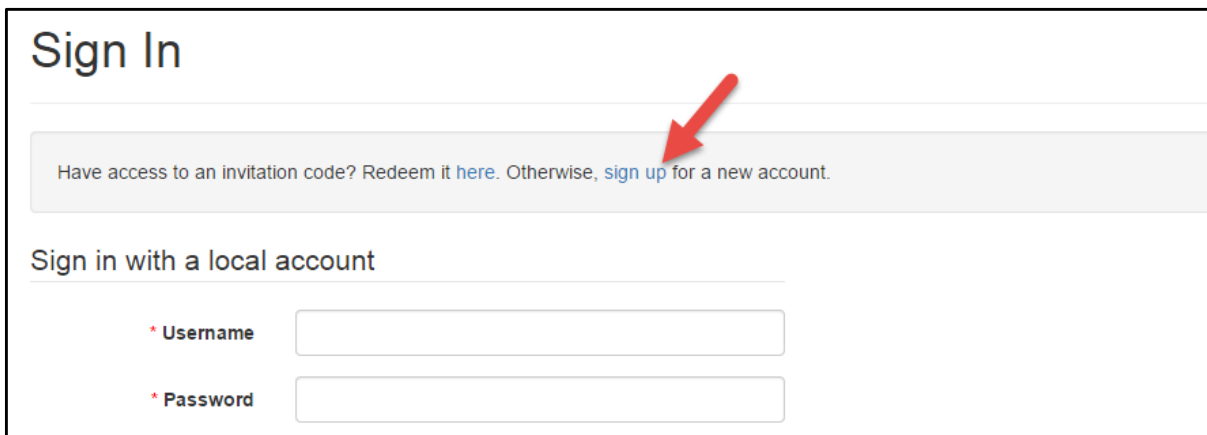
Search for records

Name ↑	Value	Website
Authentication/Registration/RequiresChallengeAnswer	false	Community Portal
Authentication/Registration/RequiresConfirmation	false	Community Portal
Authentication/Registration/RequiresInvitation	false	Community Portal
blogs/displaySearch	true	Community Portal
Ecommerce/Authorize.Net/ApiLogin	52qahL62J55d	Community Portal

- You will now register a new user. Using your web browser, navigate to your Portal and sign out if you are logged in.



- Click Sign up.



## Sign In

Have access to an invitation code? Redeem it [here](#). Otherwise, [sign up](#) for a new account.

### Sign in with a local account

\* Username

\* Password

7) Fill out the registration form and click Sign Up.

Sign up for a new local account

\* Username

\* Password

\* Confirm Password

\* Security Question

\* Security Answer

8) After the registration is completed successfully, the user will be taken to user profile page. In the profile page, the user will be asked to provide more information.

Profile

Please provide some information about yourself.

The **First Name** and **Last Name** you provide will be displayed alongside any comments, forum posts, or ideas you make on the site.

The **Email Address** and **Phone** number are required but will not be displayed on the site.

Your **Organization** is required, and a **Title** is optional. They will be displayed with your comments and forum posts.

Your Information

First Name \*

Last Name \*

Email \*

Phone Number \*

9) Fill out the form as shown in the image below and click Update.

**Your Information**

**First Name \*** Jane **Last Name \*** Doe

**E-mail \*** Jane@Doe.com **Phone Number** 123-123-1234

**Organization Name** **Title**

**Nickname** **Web Site**

Phone  
 Mail

**Update**

10) You will now verify the Portal User was added to your Dynamics CRM Contact entity. In Dynamics CRM navigate to Sales | Contacts and locate the new portal user you just submitted.

Microsoft Dynamics CRM | SALES | Contacts

NEW | DELETE | COPY A LINK | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL | IMPORT DATA

My Active Contacts

Full Name ↑	E-mail	Company Name	Phone Number
Jane Doe	Jane@Doe.com		123-123-1234
Jim Glynn (sample)	hrage@coloradotc.com	Coho Winery (sample)	555-0109
Maria Campbell (sample)	someone_d@example.com	Fabrikam, Inc. (sample)	555-0103
Nancy Anderson (sample)	someone_c@example.com	Adventure Works (sample)	555-0102

You have successfully created a Portal User using Open Registration.

This concludes the *Using Open Registration* guide.

Please proceed to the *Changing the Header and Footer* guide.