

USER MANUAL



SugarCRM Customer Portal for WordPress

Version: 3.2.0

WordPress Compatibility

WordPress: 4.0 to 5.2.2

SugarCRM Compatibility

Community Edition: 6.5* to 6.5.26

Professional Edition: 6.5* to 9.1.0

Enterprise Edition: 6.5* to 9.1.0

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Introduction

The SugarCRM Customer Portal plugin will help your customers to use several SugarCRM modules in their WP interface, which can be defined from CRM. The plugin integrates Accounts, Contacts, Calls, Meetings, Notes, Cases, Documents and Quotes module of SugarCRM to your WP interface.

It will simplify and reduce your task of communicating with your customers through any other means. Your customers would be able to update all the above modules on their own.

Benefits of Customer Portal

Being SugarCRM user, you can now manage your WordPress customers better by integrating SugarCRM and WordPress platforms and connecting your WP users with your SugarCRM system. The SugarCRM Customer Portal will provide you with the following benefits:

- Single sign-in for WordPress user account and portal
- Interactive Dashboard with recent records and quick access icons
- WordPress Multisite Support
- Create WordPress user groups and assign accessible roles for each module
- Sign-up directly from the portal, which will also create a contact record in SugarCRM
- Case commenting option
- Tawk. To Chat Plugin Integration. Capture chat conversations in SugarCRM
- Calendar view for all scheduled activities.
- Accept or Decline Quotes from Portal
- Download Quotes from Portal in PDF format.
- Global search across all module.
- Charts for cases and quotes module to view their status.
- Get Latest updates through notifications.
- Access of knowledge Base without Login.
- Generate proposal from product catalogue and convert to quote.

Prerequisites

Follow the points given below before installing:

- You should login as an Administrator in SugarCRM.
- Check that your SugarCRM Instance is compatible with Customer Portal.
- You must have a valid License Key Provided by CRMJetty.
- If you are installing Customer Portal, make sure there is no other Customer Portal already installed on Sugar CRM. If there is any, you will have to uninstall that plug-in first.
- If you have same portal's older version, upgrade it.
- Check that your WordPress portal is compatible with Customer Portal.
- You should be able to login as an admin in your WordPress portal site.

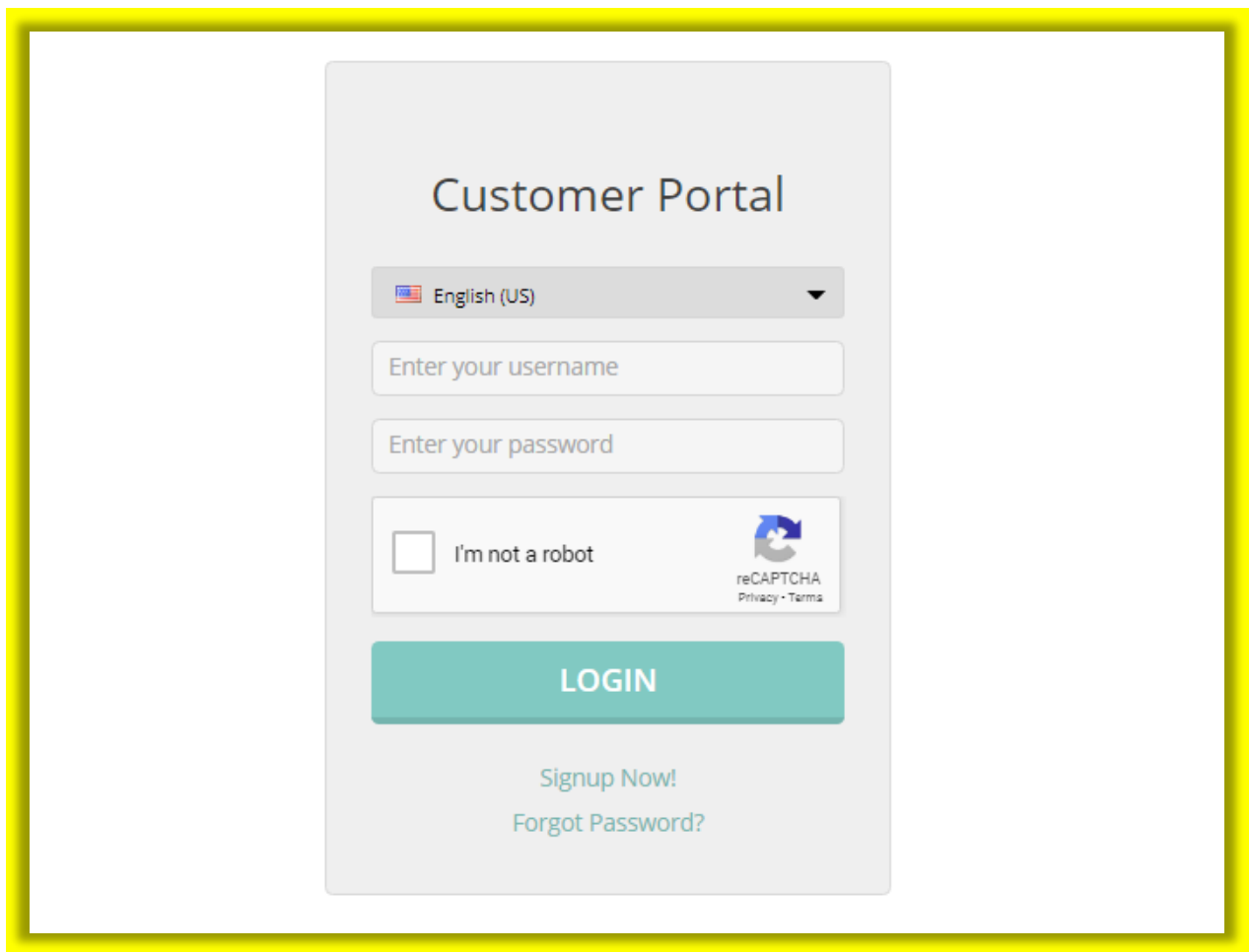
- Make sure that Customer Portal Plugins related files has proper file permissions. As per the SugarCRM, install and upgrade guideline, we advise you to give 755 recursive file permissions to custom and modules directory of your CRM instance.

Manual

Configure SugarCRM and WordPress for Customer Portal as per the instructions provided in Installation Guide and then sign-up or login to Customer Portal.

Login:

- Directly login to the portal using your portal credentials.



The image shows a screenshot of the Customer Portal login interface. The form is centered on a light gray background and is enclosed in a yellow border. At the top, the text "Customer Portal" is displayed in a large, dark font. Below this, there is a language selection dropdown menu showing "English (US)" with a small flag icon and a downward arrow. Underneath the dropdown are two input fields: "Enter your username" and "Enter your password". Below the password field is a reCAPTCHA widget with the text "I'm not a robot" and a checkbox. To the right of the checkbox is the reCAPTCHA logo and the text "reCAPTCHA Privacy - Terms". At the bottom of the form is a large, teal-colored button with the text "LOGIN" in white, uppercase letters. Below the button are two links: "Signup Now!" and "Forgot Password?", both in a teal color.

Sign Up:

- If you are a new user, you can directly sign-up from the Portal. Click on the ‘**Sign Up Now**’ link on the Login Page to register as a new user. On clicking this link, you will be redirected to sign up page.
- The credentials will be verified to check if you are already registered with same username and email address. If no such information exists in the system, a user will be created in WordPress and SugarCRM Contacts module.
- Once signed-up from the Portal, you can directly login to the Portal and can also access your WordPress Account without having to login again.
- **Note:** Already existing customers on both sides (WordPress and Sugar) won’t get the access for Customer Portal automatically on installation.

Portal Sign Up

LOGIN

Portal Signup

Username : *
jack

Password : *
.....

First Name :

Last Name : *
Jacob

Office Phone :

Mobile :
(520) 157-11090

Fax :

Title :

Email Address : *
jack.jacob@gmail.com

Primary Address Street :

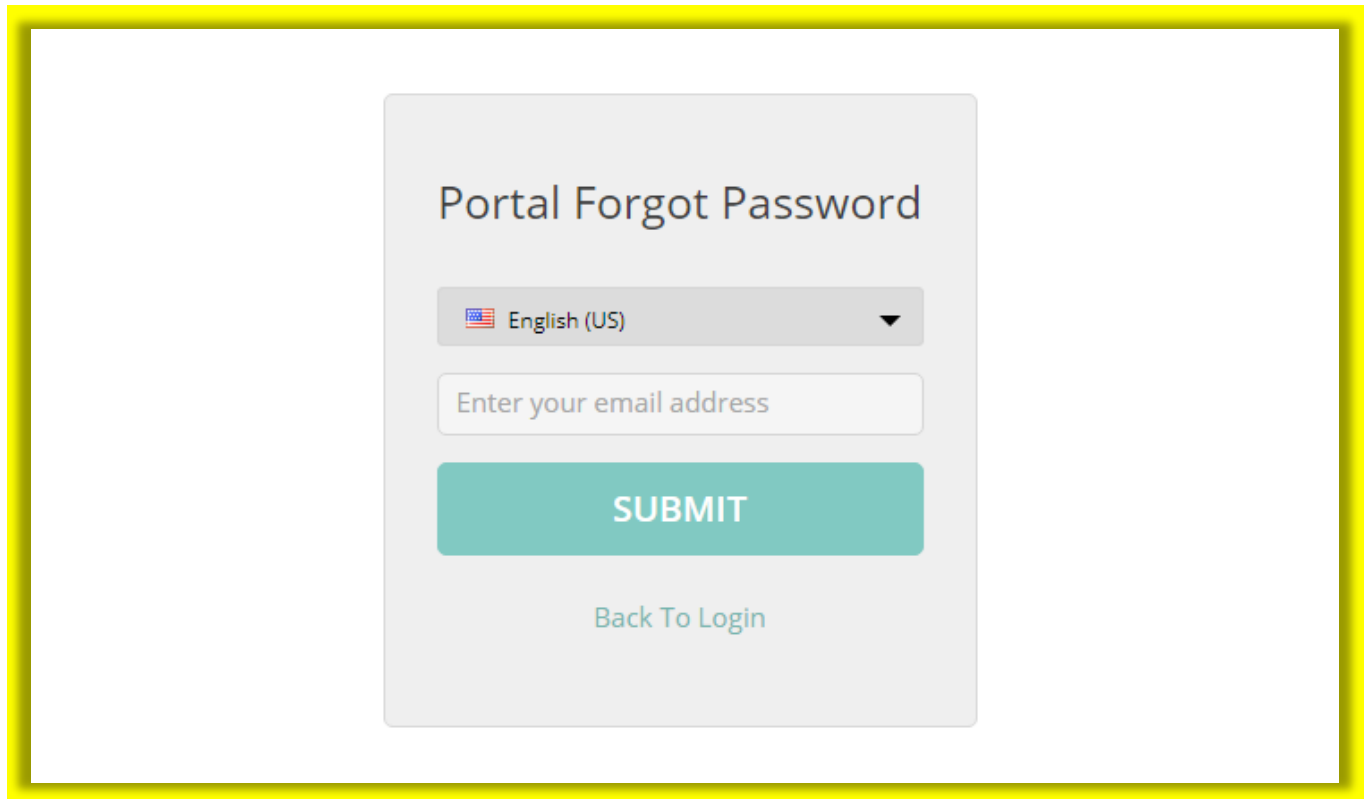
I'm not a robot

reCAPTCHA
Privacy - Terms

SUBMIT

Forgot Password:

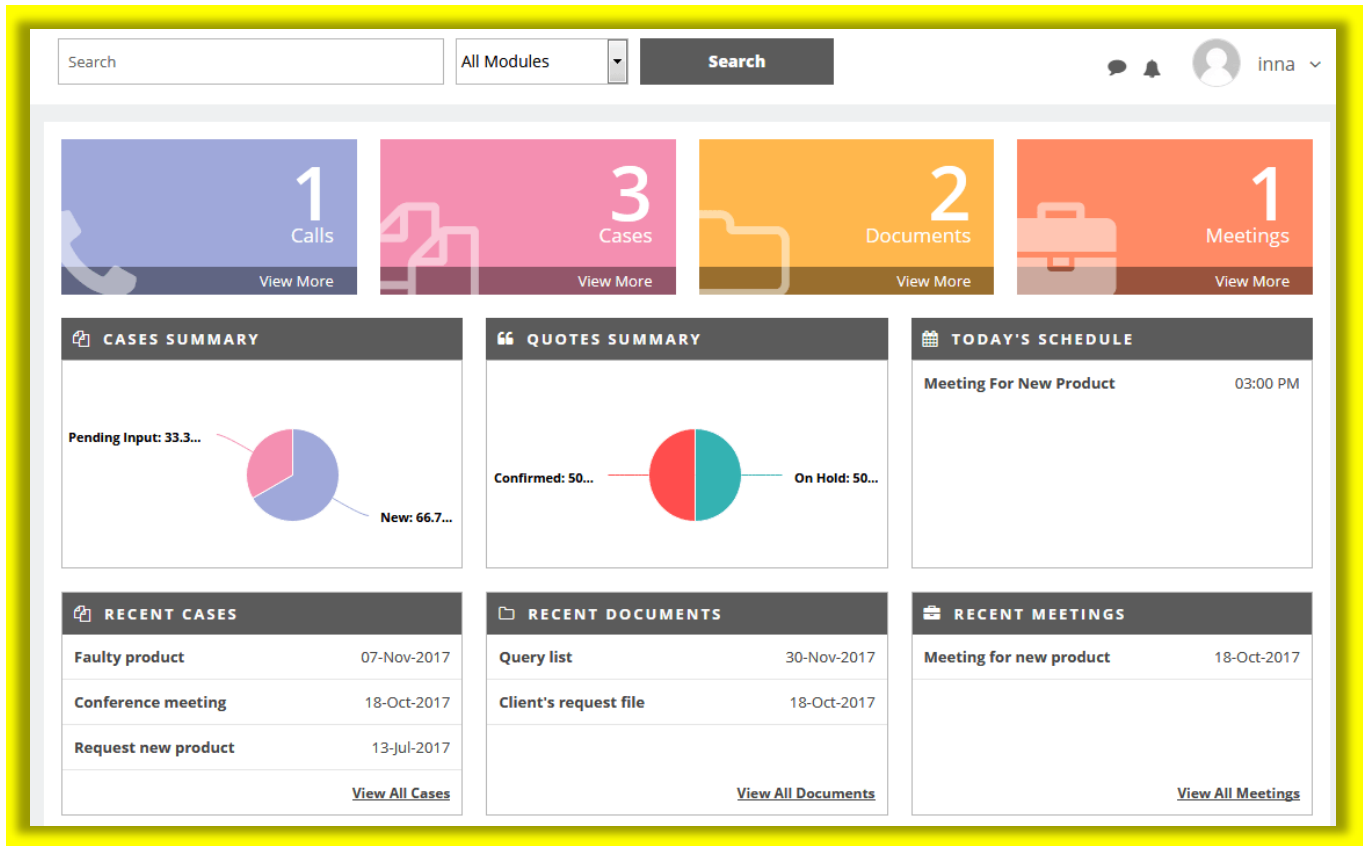
- You can retrieve your login password using the **'Forgot Password'** Option. Click on **'Forgot Password'** option and enter your username and email address. Click on **'Submit'** button and you will receive your password on your email.

A screenshot of a web form titled "Portal Forgot Password". The form is centered on a light gray background. At the top, it says "Portal Forgot Password". Below that is a language selection dropdown menu showing "English (US)" with a small American flag icon and a downward arrow. Underneath is a text input field with the placeholder text "Enter your email address". Below the input field is a large teal button with the word "SUBMIT" in white capital letters. At the bottom of the form is a link that says "Back To Login" in a teal color.

- Navigate to reset password link from your email and set new password for portal.

Portal Dashboard:

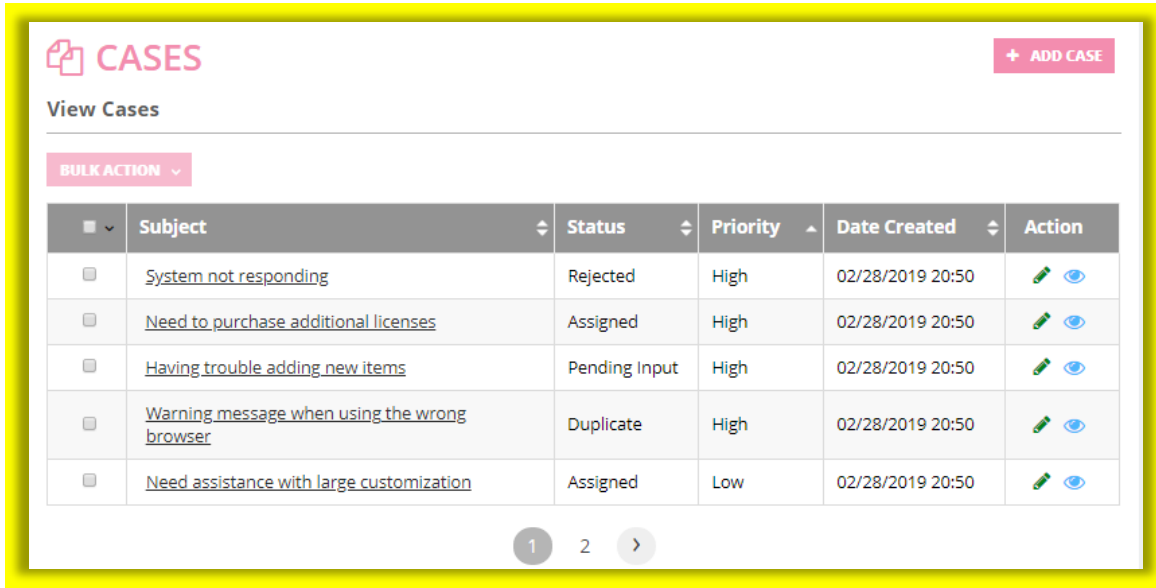
- Quickly access any module from navigation drawer. WordPress admin can set the accessibility to recently added records for portal users. Accordingly, those modules with their recent records will be displayed on the dashboard.



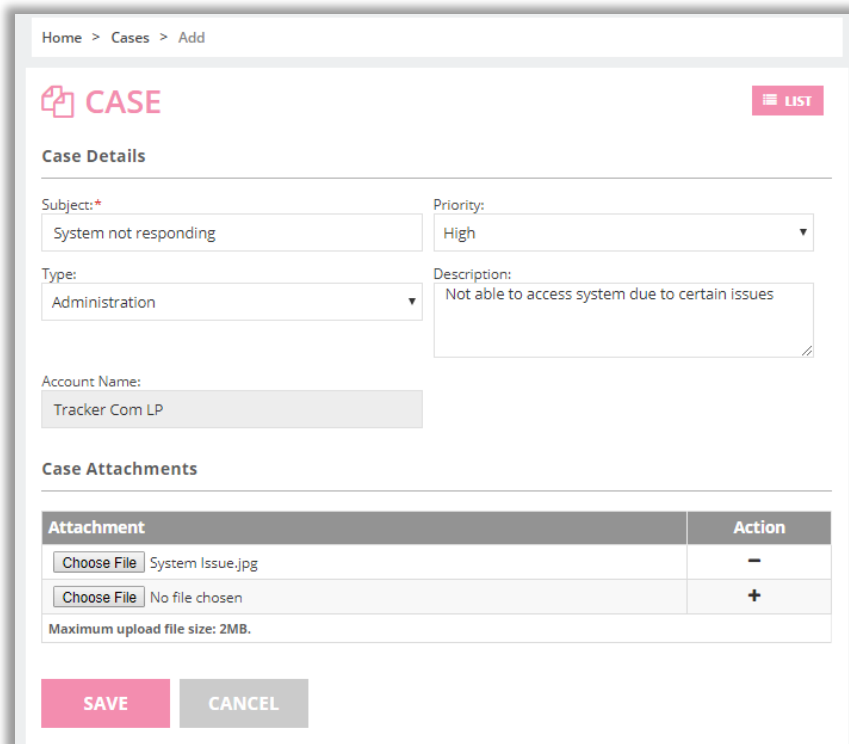
- Dashboard includes recent activities and today's schedule for viewing your whole day schedule.
- It will also display charts for cases and quotes module to view their status.
- You can also search globally from the portal or can select module from drop down to search from any specific module.

List View:

- Navigate to any module and you will be able to see the list of records of that module. You can search a record from the list view, **delete it, export csv or update it.**
- You can also add a new record to that module. To add a new record, click on the **'Add'** button.



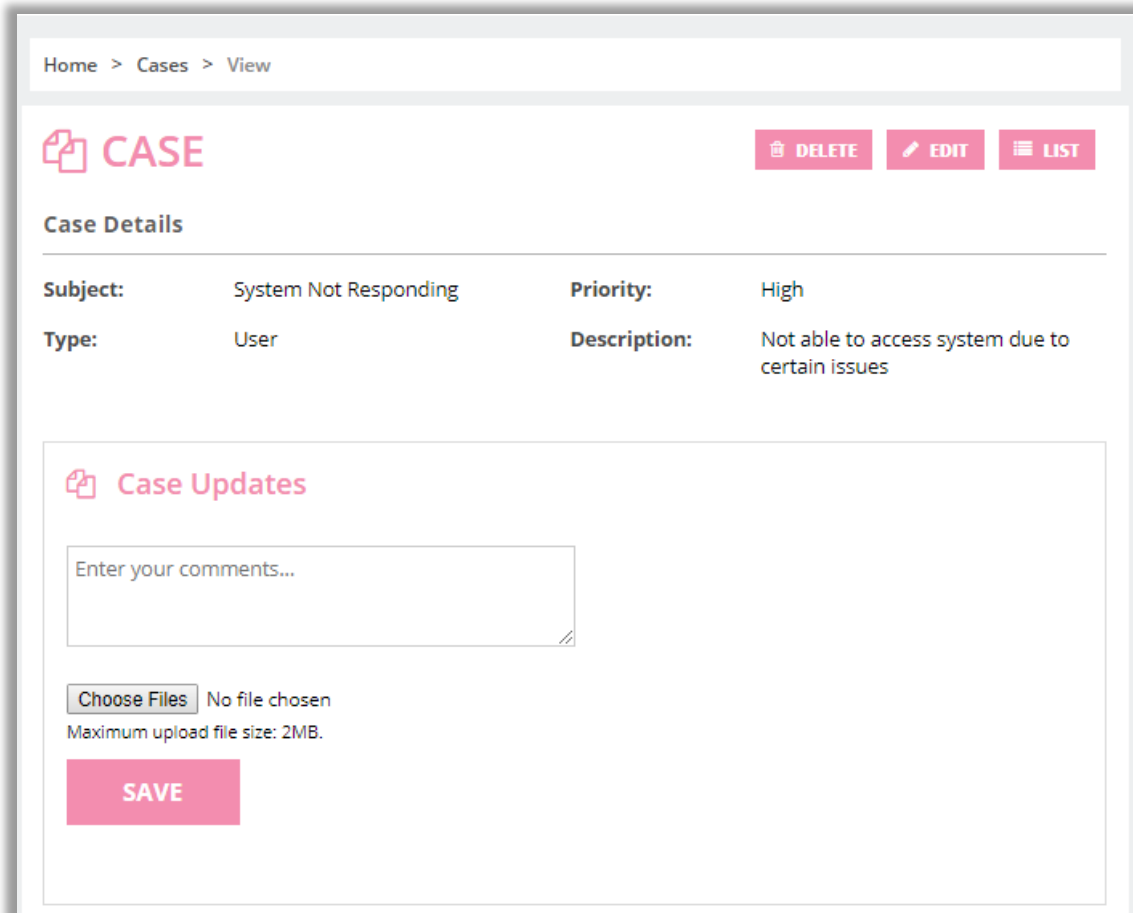
Add Record:



- Add a new record in a module from the portal and it will get reflected in the SuiteCRM.
- User will be able to view tooltips in add, edit and detail view if they are added from backend.

Detail Page:

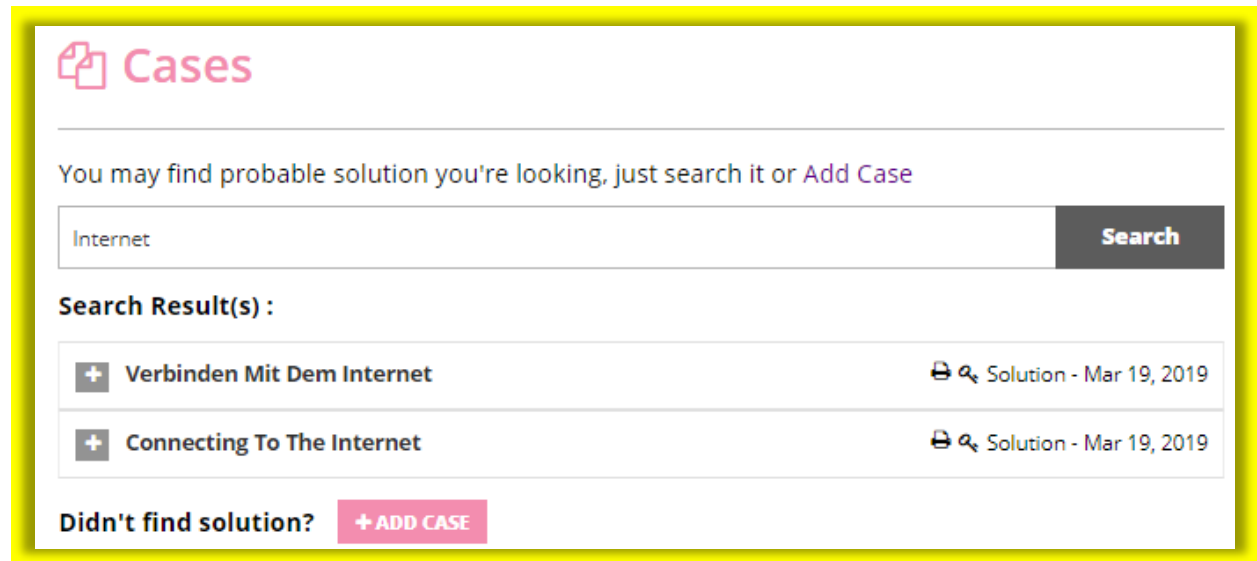
- Click on the **‘View’** button from the List View and view the details of a record. You can edit that record or delete it from the detail view.



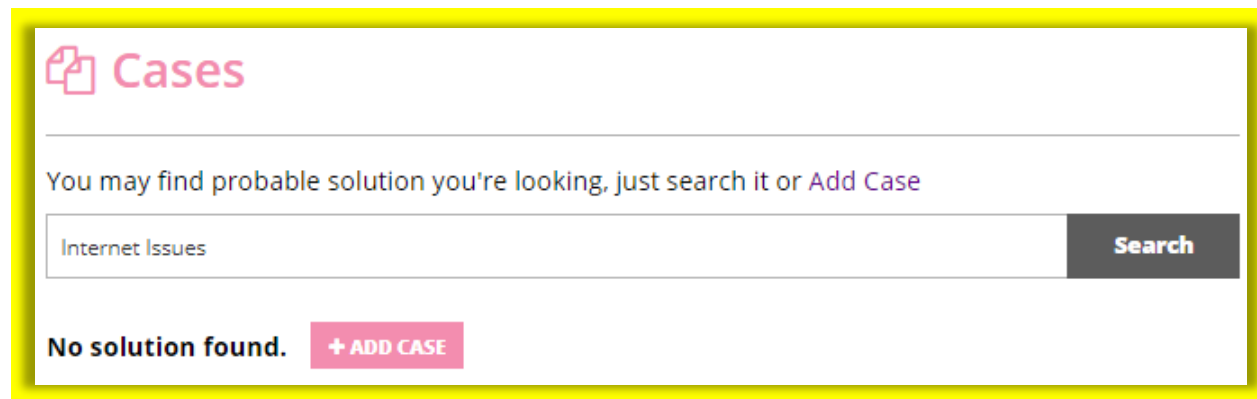
- Portal user can also print details from details view for specific modules like documents, Attachments, Notes, Quotes, Invoices and KB articles.

Case Deflection:

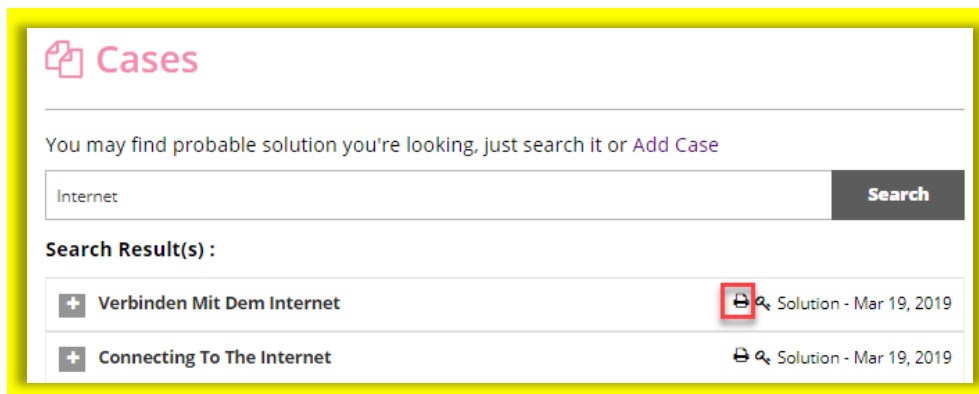
- This feature in portal will help portal user to get probable solution before generating any case.
- When portal user faces any queries or issues they will navigate to add case option.



- They can add queries or issues in search solution box. If there is any appropriate solution related to that case, then solution will get listed.



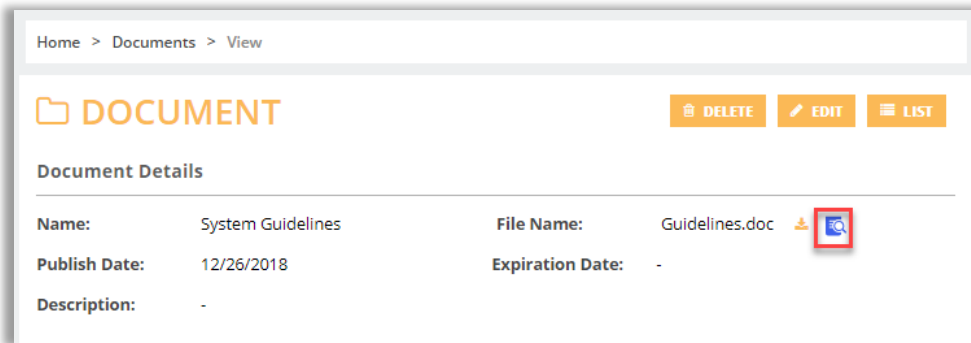
- If no solution is found related to portal users queries or issues or they didn't find which they are looking for then they can add case by clicking on "Add Case" button.



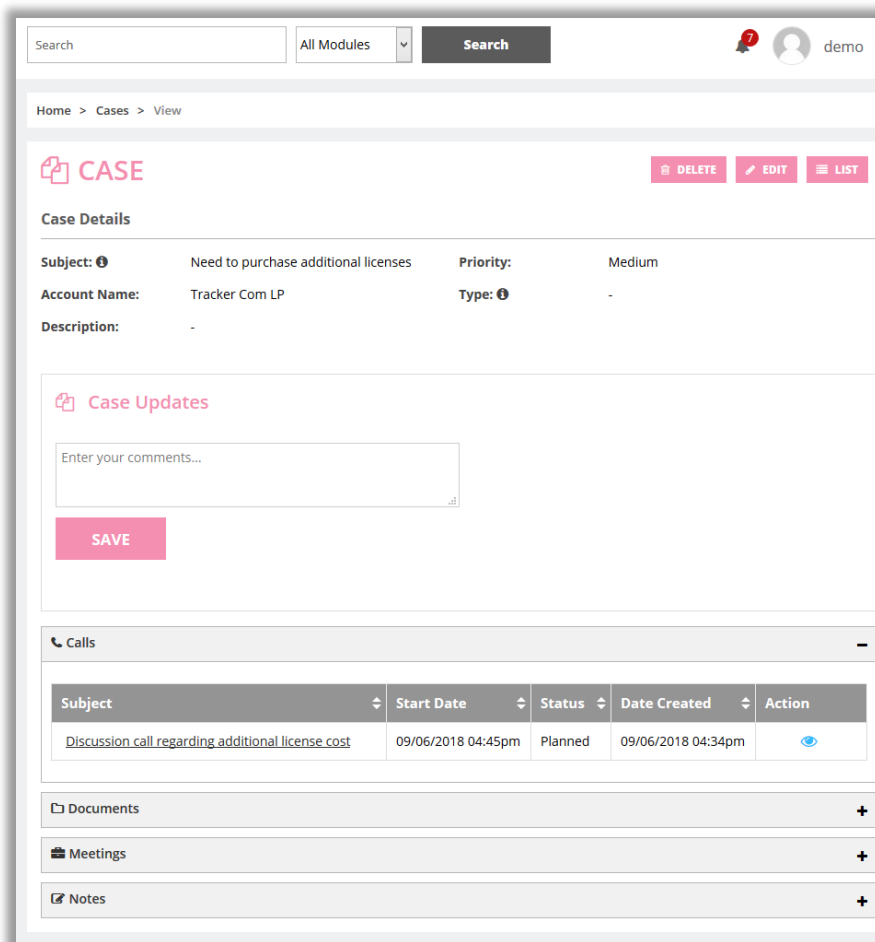
- You can also print those solution by clicking on print icon.

Attachment Preview:

- If you have any attachments in portal and you want to go through them, then you can directly access them by clicking on “Preview” button.
- You can preview attachments from list view or detail view.



Sub-Panel:



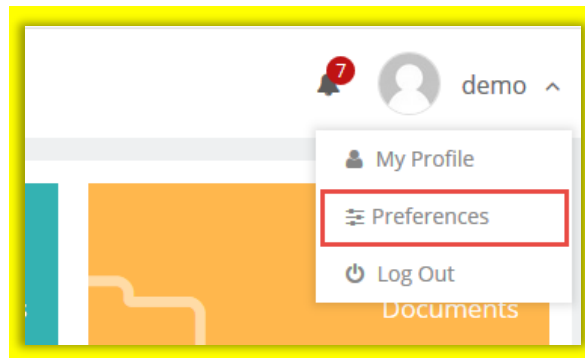
USER MANUAL: SugarCRM Customer Portal for WordPress

- Click on the **'View'** button from the List View and navigate to details of a record. You will find sub-panel related to that record in detail view.
- You can also add record from sub-panel view or navigate to detail view of that listed record.

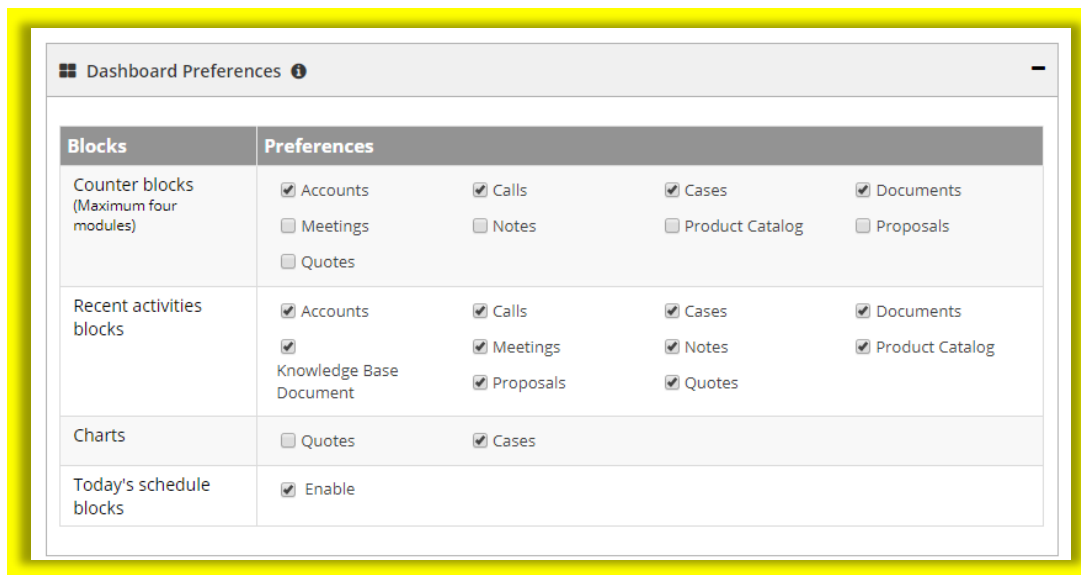
Note: Only those calls and meeting will be visible in sub panel which are made portal visible from CRM.

Dashboard Preferences:

- Customer Portal gives portal user an option set their required dashboard preference from portal itself.



- To set preferences, navigate to **"preferences"** page by clicking on profile drop-down.

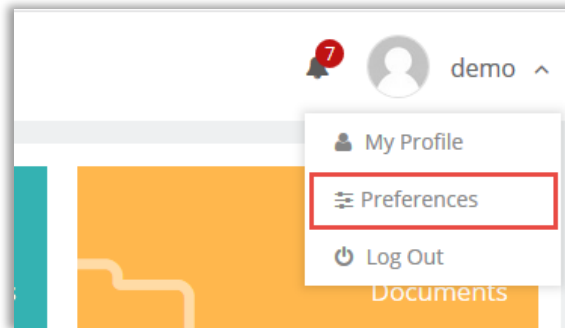


- You can enable/disable preferences for dashboard as per your requirement.
- Once you set the preferences click on **"Save"** button to save dashboard preference.

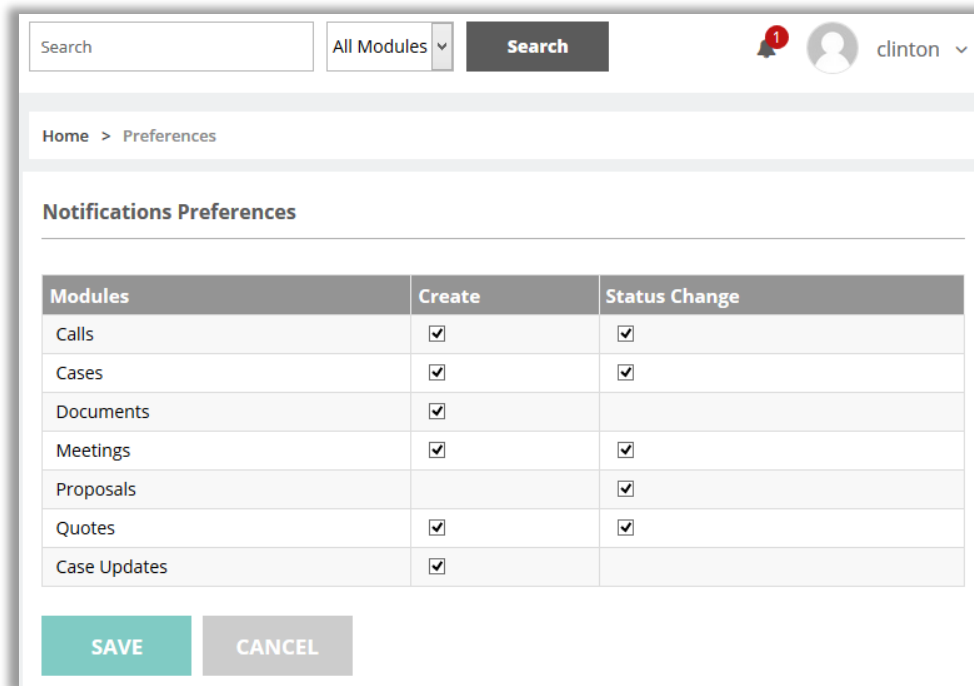
Note: By default, preference set by admin will be visible.

Notification Preferences:

- Customer Portal gives portal user an option set notification preference from portal itself.



- To set preferences, navigate to “preferences” page by clicking on profile drop-down.

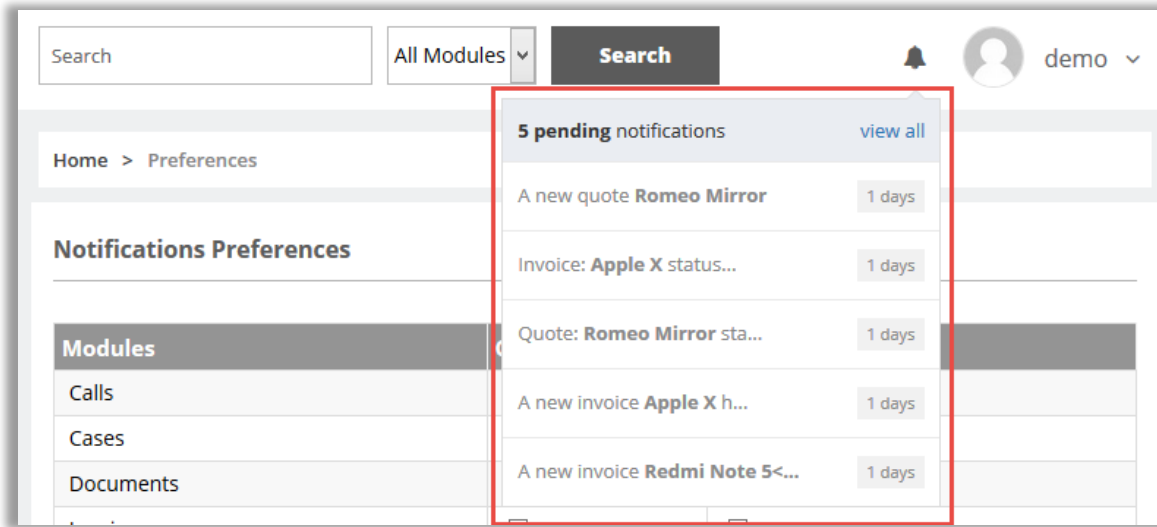


- You can enable/disable preferences for creation of any record and on status change of record.
- Once you set the preferences click on “Save” button to save notification preference.

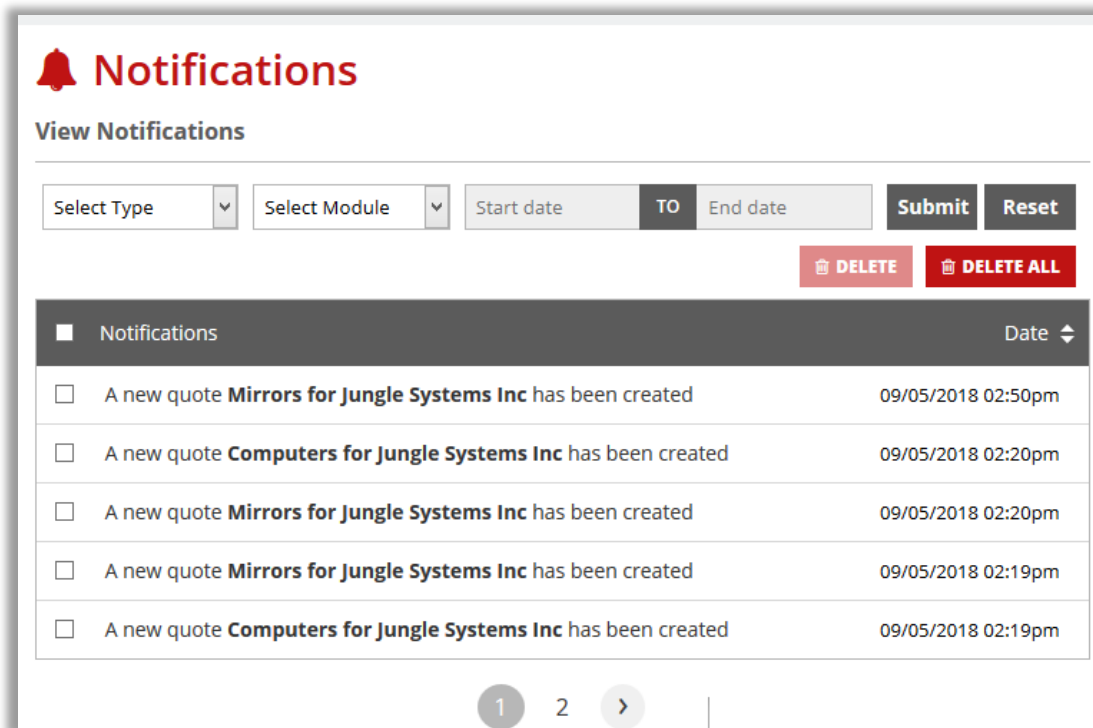
Note: By default, all the preferences will be set as enabled.

Notifications:

- Our login portal provides you the functionality to view notification which helps you to identify latest updates.



- For viewing the updates, you need to click on notification icon. It will list the latest five notifications.
- If you want to view all the notifications click on “view all” button from pop-up. It will re-direct you to list of notifications.



- You can also delete the unwanted notification from the list. Select notifications and click on “Delete” button or click on “Delete All” button if you want to clear the notification list.

Notifications

View Notifications

Select Type ▼ Select Module ▼ 2018-09-01 TO End date Submit Reset

Select Type
Create
Status Change
Case Updates

Select Module
Calls
Cases
Documents
Meetings
Proposals
Quotes

Prev SEP 2018 Next

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

A new call Client... been created

A new meeting... been created

A new case comment is added on Need to purchase additional licenses 09/07/2018 11:53am

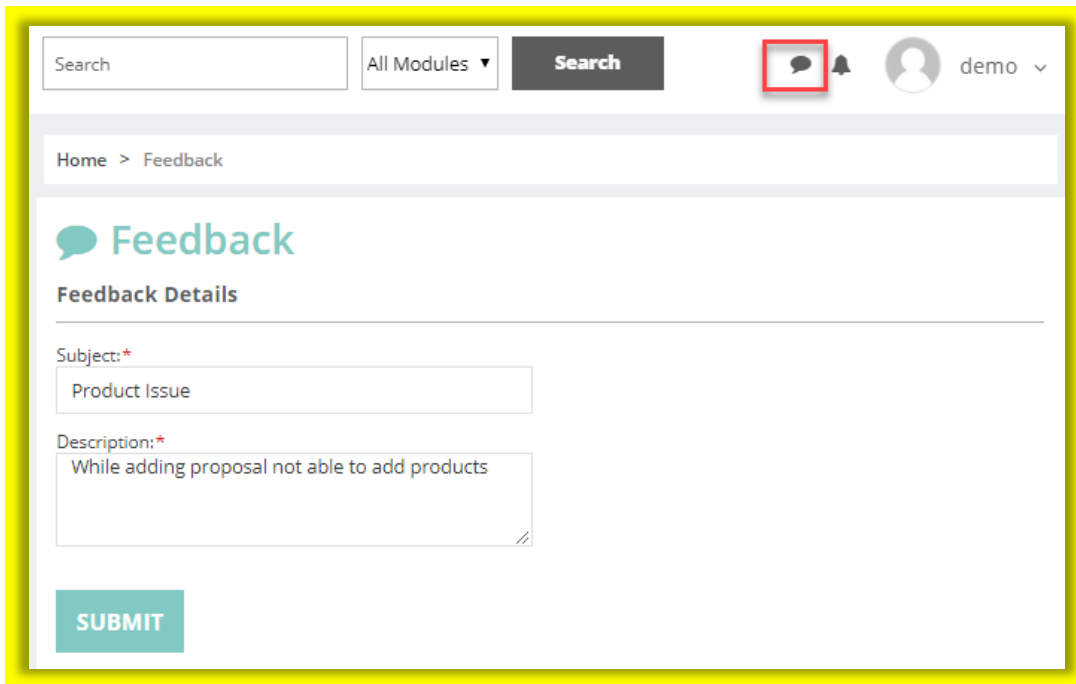
A new case comment is added on Need to purchase additional licenses

1 2 3 4 >

- You can also apply filtering on notifications for various parameters as mentioned below: -
 - **Type:** Notifications are generated on basically three type i.e. on create, on status change and on case updates. So, you can apply filter and view specific type of notification list.
 - **Module:** Choose module to view module specific notifications.
 - **Start Date and End Date:** Choose dates to view in between notifications for that particular day, week, month or year.

Feedback:

- By using feedback section, a portal user can add feedback.



The screenshot shows the user interface for adding feedback. At the top, there is a search bar, a dropdown menu for 'All Modules', and a 'Search' button. To the right, there are icons for a chat bubble (highlighted with a red box), a notification bell, and a user profile icon labeled 'demo'. Below the navigation bar, the breadcrumb 'Home > Feedback' is visible. The main heading is 'Feedback' with a speech bubble icon. Underneath, the section is titled 'Feedback Details'. It contains two required fields: 'Subject:*' with the text 'Product Issue' and 'Description:*' with the text 'While adding proposal not able to add products'. A teal 'SUBMIT' button is located at the bottom left of the form area.

- Add subject and description for feedback and save. It will get related to this particular contact in CRM. So, in contacts you will get sub-panel of feedback where there will be a list of feedbacks added by that portal user.
- Portal user can also add multiple feedback from portal as an when require.

Calendar Page:

- View or add Calls and Meetings from the calendar for a particular date.

CALENDAR

December 2017

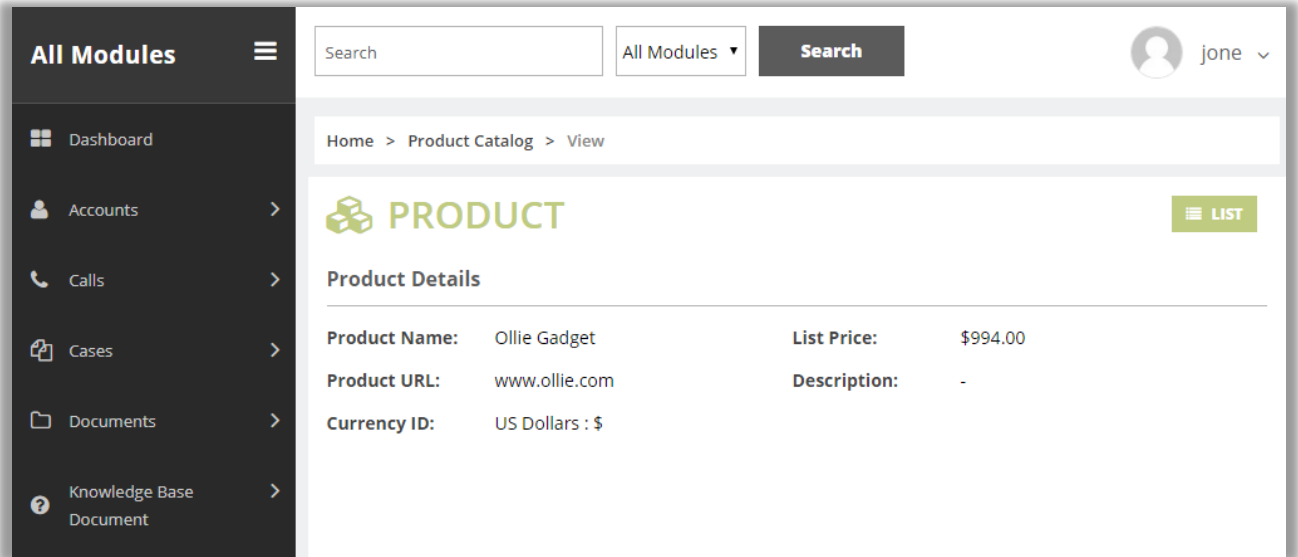
< > Today Month Week Day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1 3:30 a - Analysis for new product	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

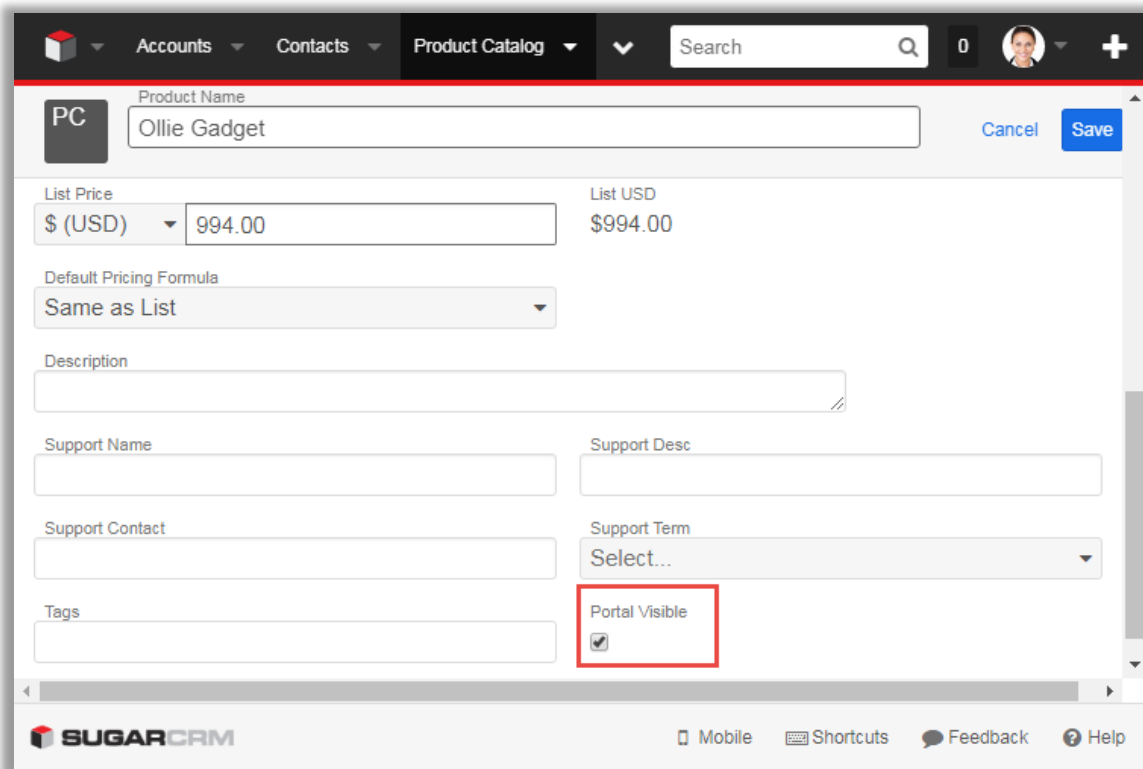
Calls : 0 Meetings : 1

Product Page:

- View the list of products from product catalog page. You can also navigate to detail view and find out the details of that specific product.



Note: Only those products will be visible in portal which are set as “portal visible” by admin from the detail view of portal.



Proposals:

- You can create proposal with the required products and services.

PROPOSAL LIST

Proposal Details

Name: *
Product Upgrade

Product Catalog Search Clear

	Product Name	List Price	Qty	Total
<input type="checkbox"/>	Ollie Gadget	994.00	<input type="text" value="0"/>	0.00
<input type="checkbox"/>	Keri Gadget	986.00	<input type="text" value="0"/>	0.00
<input type="checkbox"/>	Lila Gadget	860.00	<input type="text" value="0"/>	0.00
<input type="checkbox"/>	Horace Gadget	809.00	<input type="text" value="0"/>	0.00
<input type="checkbox"/>	Daniell Gadget	872.00	<input type="text" value="0"/>	0.00

Show more

Services

Service Name
Sassora Gadget +

SAVE CANCEL

- Once the proposal is created, user can edit or delete that proposal only if it is in **“Pending”** state.

PROPOSALS +

View Proposals

Name	Date Created	Proposal Status	Action
New product list	04/24/2018 04:45pm	Converted	
Product upgrade	04/23/2018 07:16pm	Pending	

- Admin can convert the proposal to quote by **“Convert to Quotes”** option.

Name	Proposal Status	Assigned to	Created From
New product list	Converted		Portal
New Inventory Requirement	Converted		Portal
Product upgrade	Pending		Portal
Service Upgrade	Converted		Portal
Warehouse Products	Pending		Portal

Note: Proposal cannot be changed once the proposal is converted or declined by admin.

- Once the quotes are converted, they will also be listed in detail view of corresponding proposal.

PROPOSAL
[LIST](#)

Proposal Details

Name:	New product list	Proposal Status:	Converted
Date Created:	04/24/2018 04:45pm	Reason for Decline:	-

Product Catalog

Product Name	List Price	Qty	Total
Ollie Gadget	994.00	5	4,970.00
Lila Gadget	860.00	7	6,020.00

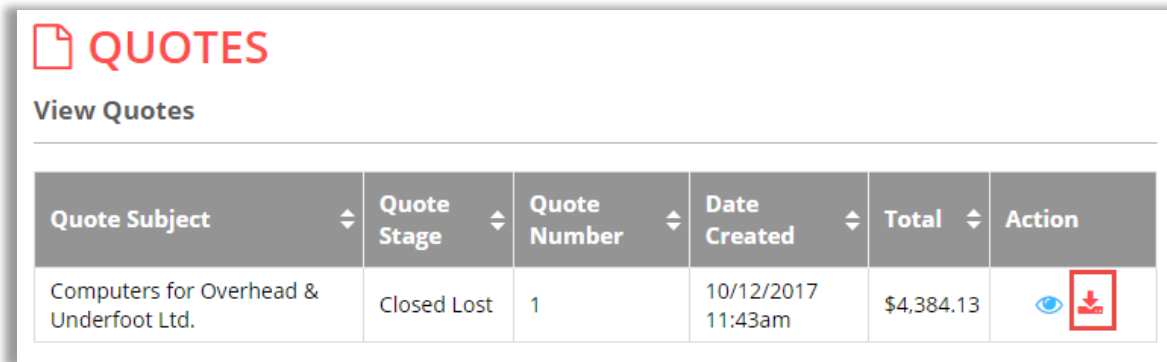
QUOTES



View Quotes

Quote Subject	Quote Stage	Quote Number	Date Created	Total	Action
New product list	Draft	10	05/03/2018 02:06pm	\$10,990.00	

View and Download Quotes:

- View or Download Quotes added by admin from SugarCRM side in Portal.

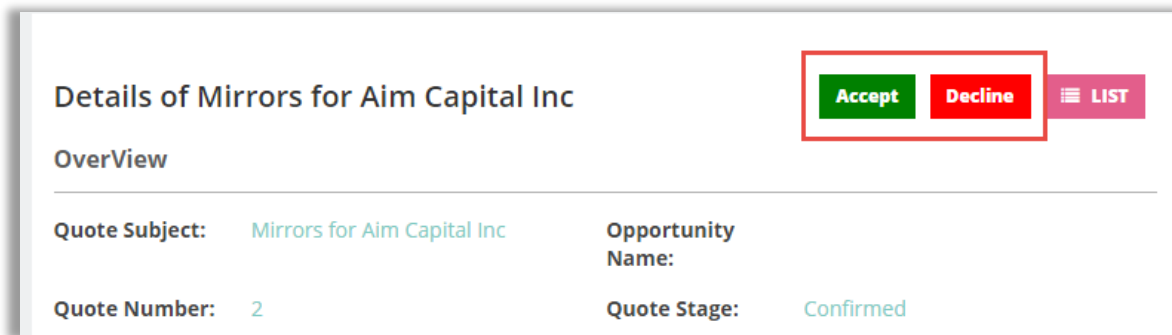


Quote Subject	Quote Stage	Quote Number	Date Created	Total	Action
Computers for Overhead & Underfoot Ltd.	Closed Lost	1	10/12/2017 11:43am	\$4,384.13	 

- To download the PDF version of Quotes, click on the download icon under ‘Actions’ column.

Accept or Decline Quote from Portal:

- A button to accept or decline the quote will appear in the detail view of a quote when it reaches “confirmed” stage.



Details of Mirrors for Aim Capital Inc

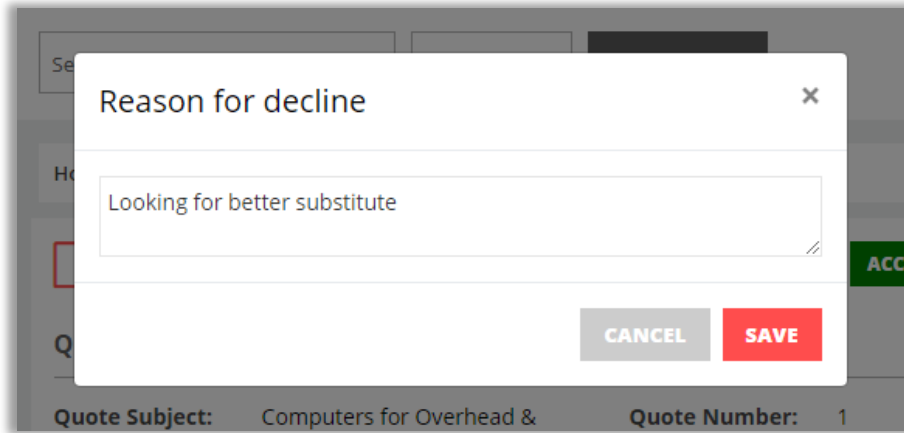
Accept Decline LIST

OverView

Quote Subject: Mirrors for Aim Capital Inc Opportunity Name:

Quote Number: 2 Quote Stage: Confirmed

- On clicking “Accept” button the quote stage changes to “Closed Accepted”
- On clicking “Decline” button the quote stage changes to “Closed Dead”. For Decline you need to provide the reason for declining the quote.



- Once the quote is declined, CRM admin and user can view quote rejection history from the details view of that particular quote.

QUOTE Status: Closed Lost [LIST](#)

Quote Details

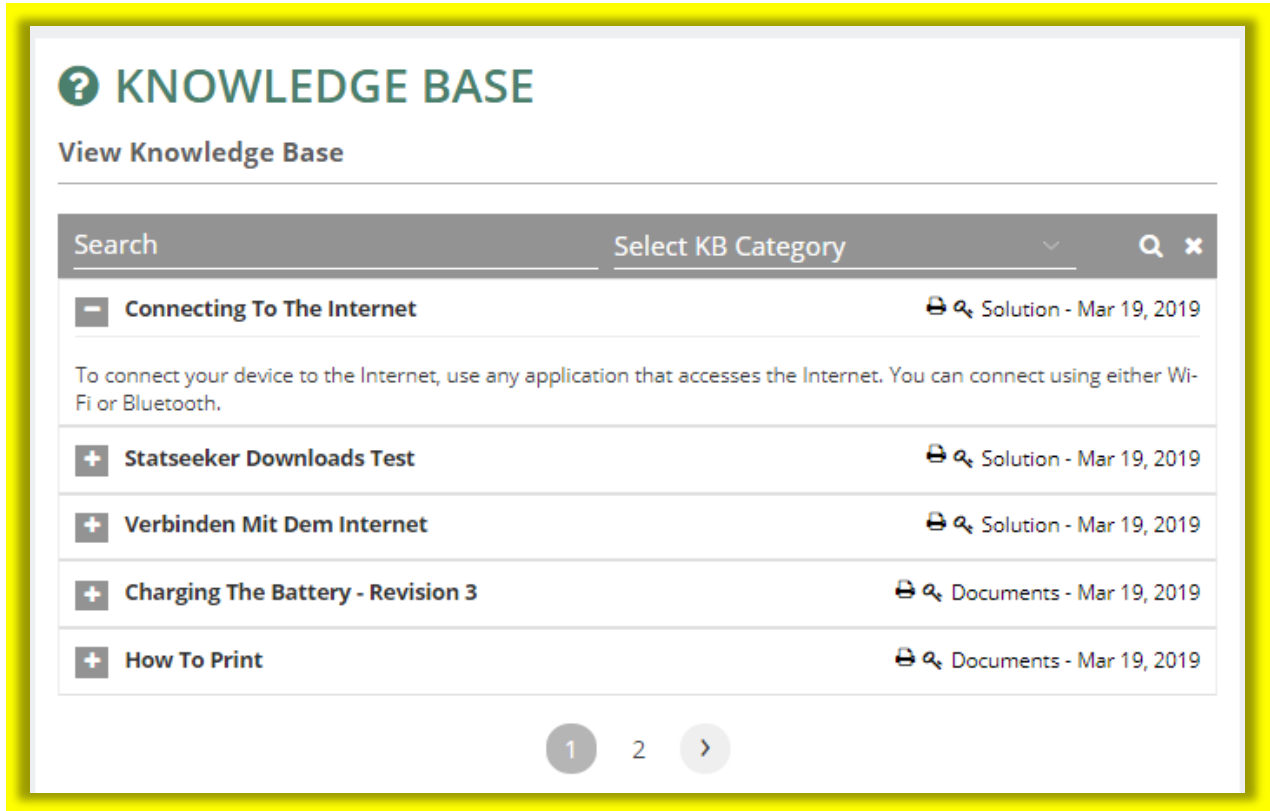
Quote Subject: Computers for Overhead & Underfoot Ltd.	Quote Number: 1
Quote Stage: Closed Lost	Valid Until: 04/30/2012
Payment Terms: Net 30	Shipping Account Name: -
Billing Account Name: Overhead & Underfoot Ltd.	Billing Address: 777 West Filmore Ln
Shipping Address: 777 West Filmore Ln	Total: \$4,384.13
Description: -	Reason: Reason: Looking for better substitute Date: 05/03/2018 03:28pm Reason: Over Budget Date: 04/25/2018 01:36am

- Admin can edit the quotation on the basis of rejection reason and resend the same to user.

Note: This cannot be changed again from the portal.

Knowledge Base:

- Access the Knowledge Base module of SugarCRM from portal to view question and answers based on category.

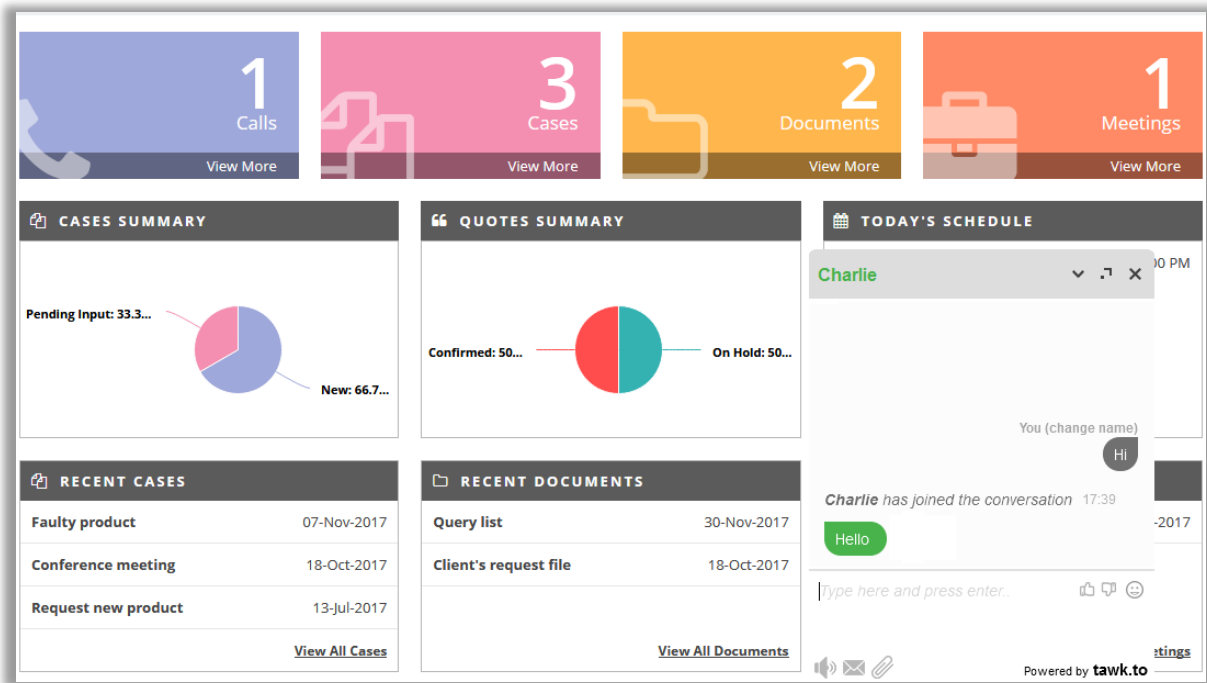


Note: Quote and Knowledge Base module support is only for SugarCRM Pro and Enterprise version.

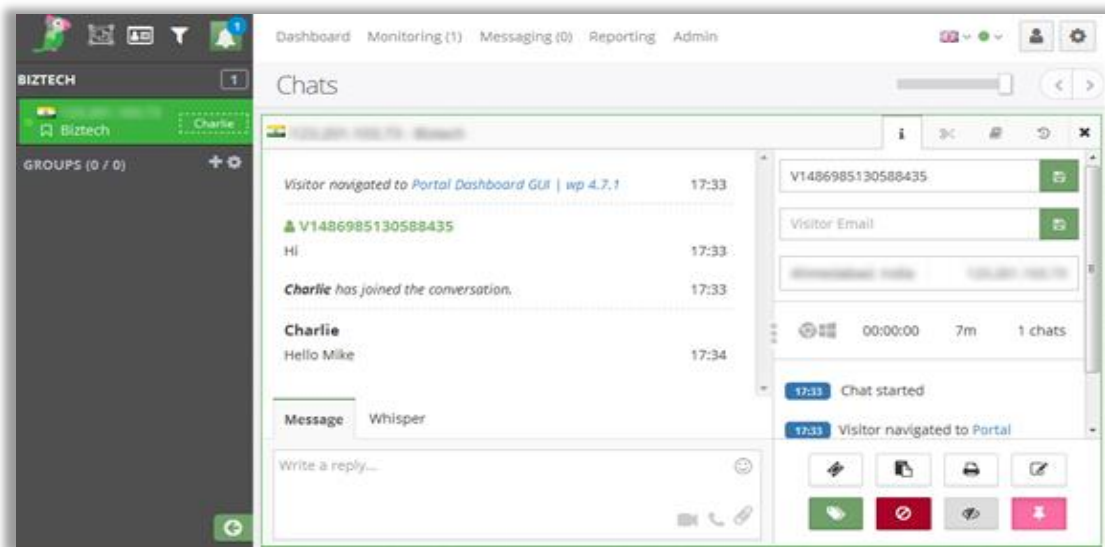
Note: Knowledge Base can be accessed without login by using this "[bcp-knowledge-base]"shortcode, and make sure document status should be public.

Chatting:

- Once twak.to plugin is successfully configured, you can start chatting with your portal users using the chat widget.



- The chats can be monitored from the twak.to dashboard. Once the chat is completed, a transcript of that chat will be generated and sent to the configured email address.
- Also, a case will be generated in the CRM with the chat transcript which can be related to a concerned user.



Contact Us

We simplify your business, offer unique business solution in digital web and IT landscapes.



Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: <https://www.crmjetty.com/sugarcrm-wordpress-customer-portal.htm> and click on the Live Chat button for instant support.



Tickets

- Raise tickets for your specific question!
- Send an email to support@crmjetty.com Or you can login to your account @ www.crmjetty.com and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

Customization:

If you would like to customize or discuss about additional feature for Customer Portal, please write to sales@crmjetty.com