

## USER MANUAL



# SugarCRM Customer Portal for WordPress

**Version: 4.0**

### WordPress Compatibility

WordPress: 4.0 to 5.7.1

### SugarCRM Compatibility

Community Edition: 6.5\* to 6.5.26

Professional Edition: 6.5\* to 11.0

Enterprise Edition: 6.5\* to 11.0

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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
- Data access to the Customer Portal based on the selection of Relation Type: **Contact** or **Account**
- Interactive Dashboard with recent records and quick access icons
- WordPress Multisite Support
- Set default as well as custom module accessibility in portal
- 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 modules.
- 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.

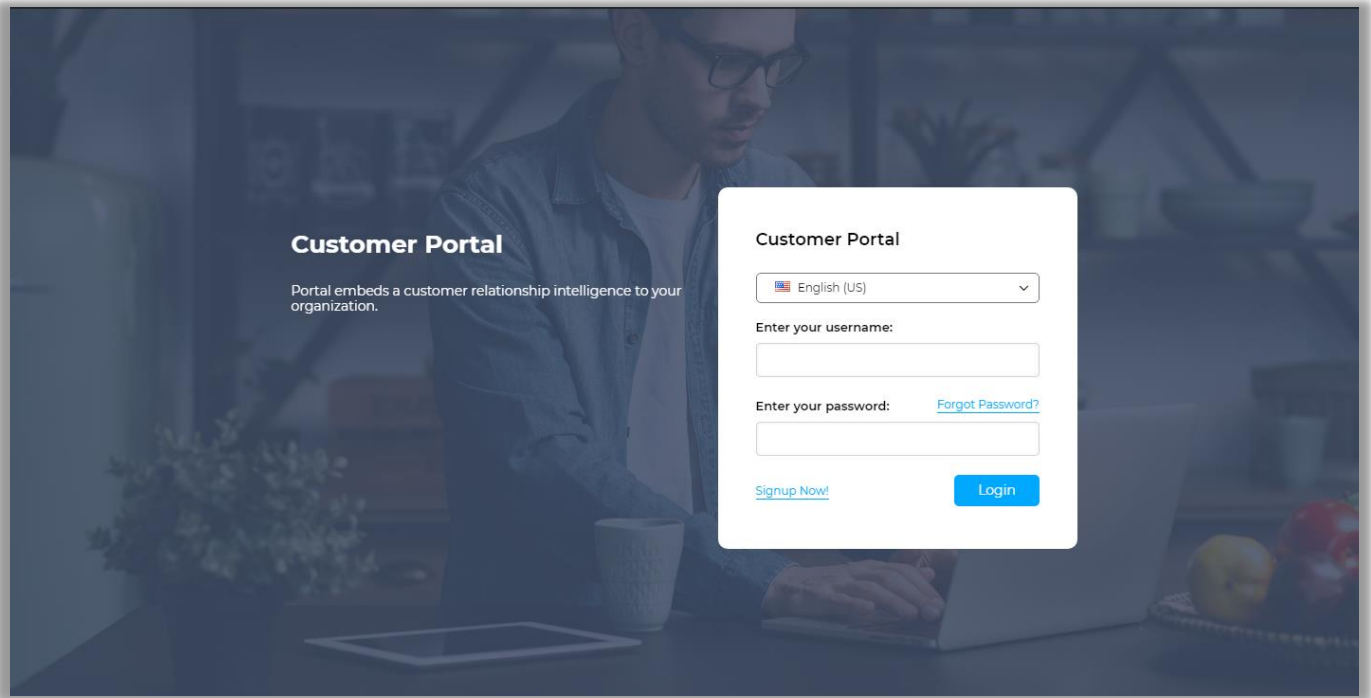
## Manual

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

# Customer Portal

## Login, Sign up & Forgot Password

- Directly login to the portal using your portal credentials.



- If two-step authentication is enabled, then portal users will receive an OTP in email. Enter valid OTP and it will allow portal users to access interface.

### Portal Forgot Password

English (US) ▼

Email Address:

[Resend OTP](#)

[Back to Login](#)

Login


**Note:** OTP is valid for 30 minutes. If not used, then portal user needs to resend OTP and get new OTP.

### 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

 ▼

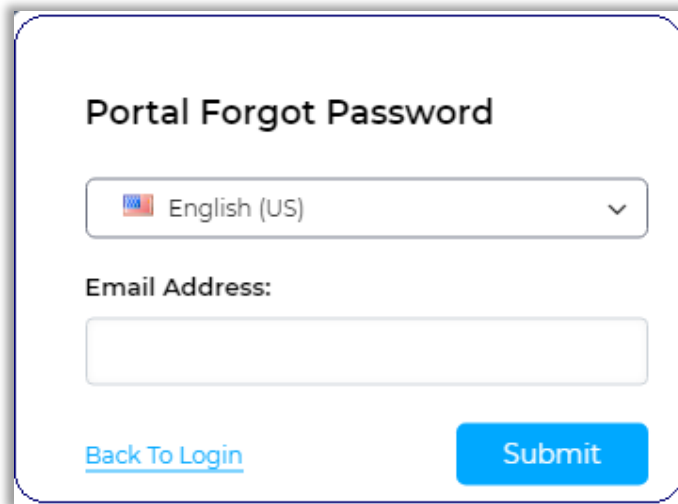
Login

Username*	Password*
<input type="text"/>	<input type="password"/>
First Name	Last Name*
<input type="text"/>	<input type="text"/>
Office Phone	Mobile
<input type="text"/>	<input type="text"/>
Fax	Title
<input type="text"/>	<input type="text"/>
Email Address*	Primary Address Street
<input type="text"/>	<input type="text"/>
Profile Image	
<div>Choose File No file chosen</div>	
Maximum upload file size: 1MB.	
Save	

- When any user registers in the portal, an account will be automatically created with the entered username.

### 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.

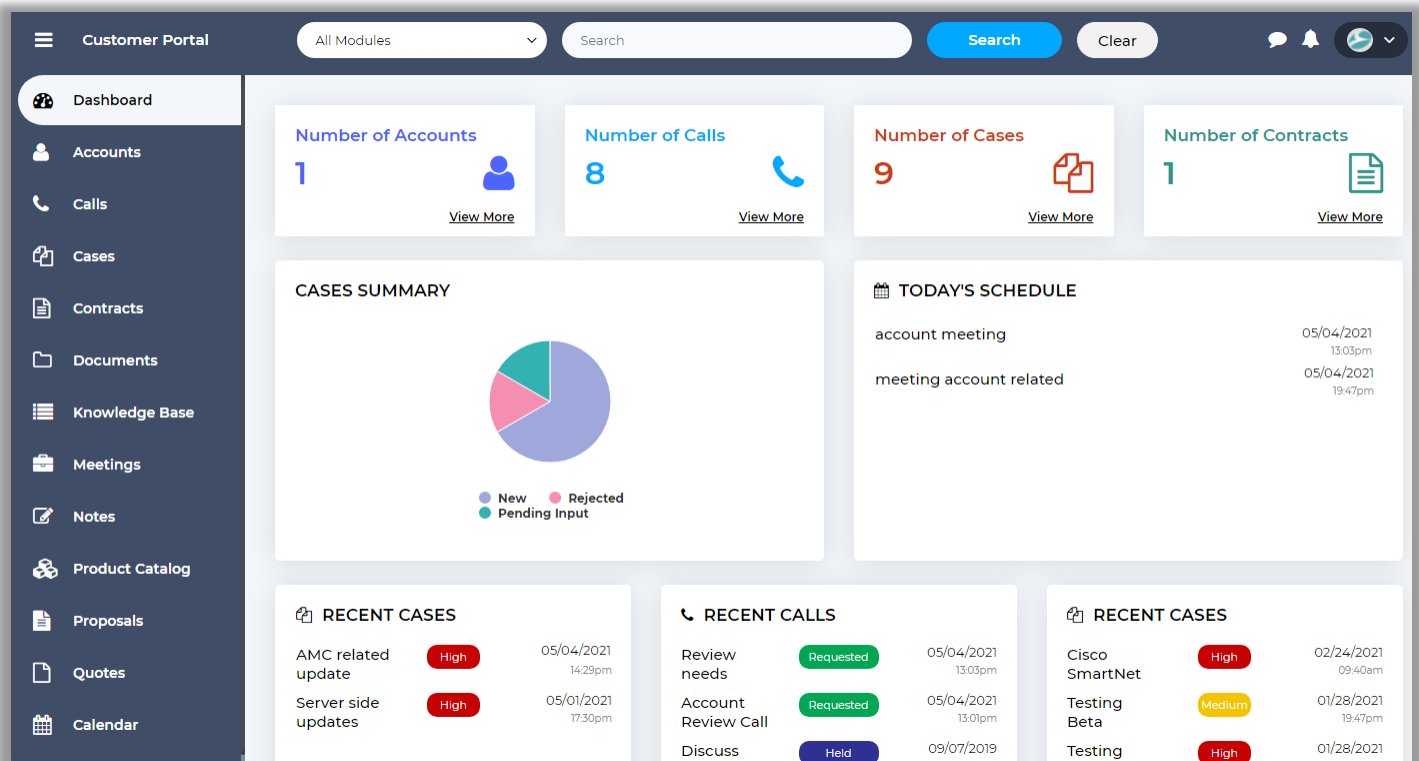


The screenshot shows a web form titled "Portal Forgot Password". At the top, there is a language selection dropdown menu currently set to "English (US)". Below this is a label "Email Address:" followed by a text input field. At the bottom left of the form is a blue link labeled "Back To Login", and at the bottom right is a blue button labeled "Submit".

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

### Portal Dashboard

- Dashboard includes recent activities and today's schedule for viewing your whole day schedule.
- 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.
- Quickly access top modules by clicking “View More”. It will also display charts for cases and quotes module to view their status.
- As the admin has selected the “Relation Type” from the SugarCRM side in the Portal user group configuration, you will get either “Contact” based, or “Account” based modules’ data.
- Suppose the admin has selected Account as “Relation Type”, the details will be loaded on the dashboard and will be loaded based on the relationship with the account.

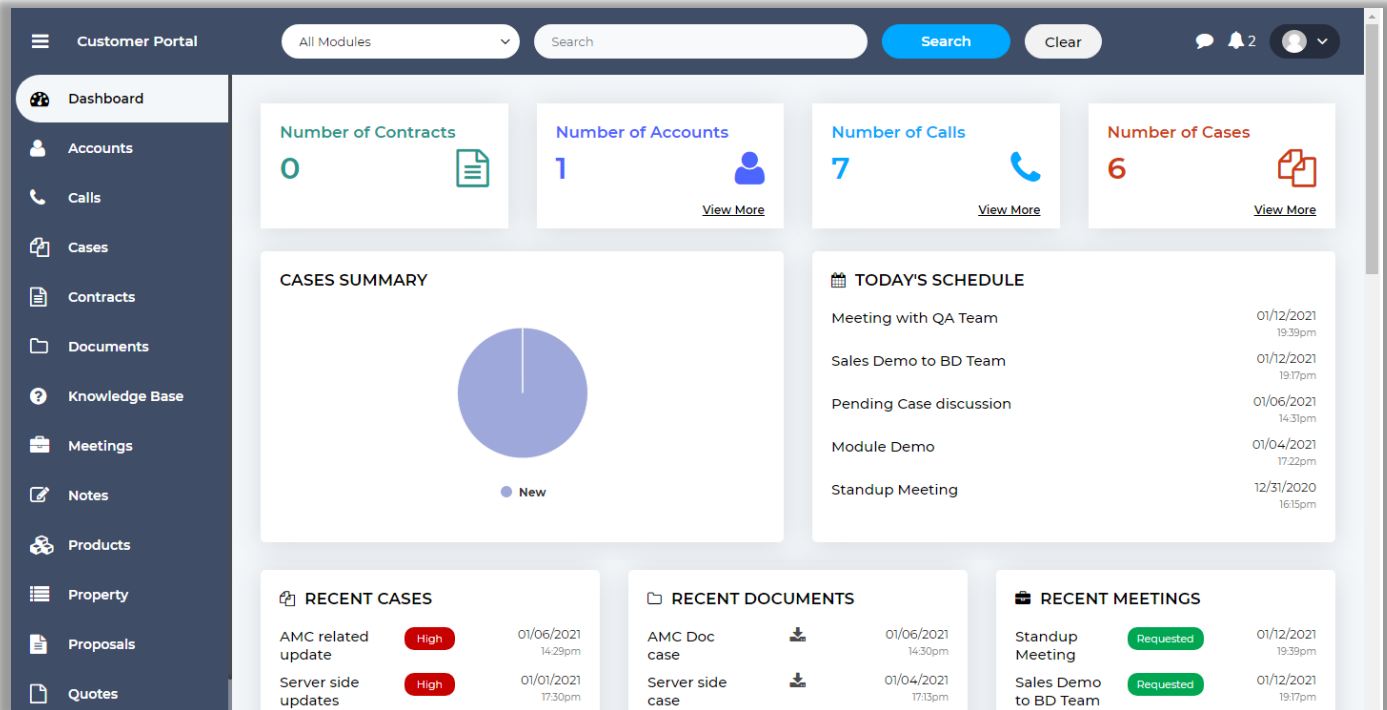


- You can also search the data globally from the portal or you can select module from drop down to search from any specific module.
- You will get the global search result of data or the selected module will be loaded as per the module's relationship with the selected "Relation Type", either Contact based, or Account-based

**Note:** For the Note, Meeting, and Call modules, the data will be loaded based on the relationship with the account and accounts related to all contacts data of the contact portal logged-in Contact.

## USER MANUAL: SugarCRM Customer Portal for WordPress

- Suppose the admin has selected Contact based as “Relation Type”, the details will be loaded on the dashboard and will be loaded based on the relationship with the contact.





### 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 will get data of any module in the listing page as per the selection of the “Relationship Type”, either based on Contact or Account.

**Customer Portal** All Modules Search Clear

**Cases** + Add

BULK ACTION 5

<input type="checkbox"/>	Subject	Status	Priority	Date Created	Action
<input type="checkbox"/>	Cisco SmartNet	New	High	02/24/2021 09:40	...
<input type="checkbox"/>	AMC renewal issue	New	Medium	01/28/2021 19:47	...
<input type="checkbox"/>	Membership Upgrade	New	High	01/28/2021 17:51	...
<input type="checkbox"/>	Demo Case for the Steven	New	Low	09/09/2020 21:49	...
<input type="checkbox"/>	Case of Electricity	Closed	High	09/09/2020 19:25	...

5

1 2 >

- You can also add a new record to that module. To add a new record, click on the ‘+ Add’ button.

**Cases** + Add

BULK ACTION 5

<input type="checkbox"/>	Subject	Status	Priority	Date Created	Action
<input type="checkbox"/>	Cisco SmartNet	-	High	02/24/2021 09:40	...
<input type="checkbox"/>	Testing Beta	-	Medium	01/28/2021 19:47	...
<input type="checkbox"/>	Testing Alpha	-	High	01/28/2021 17:51	...
<input type="checkbox"/>	Demo Case for the Steven	New	Medium	09/09/2020 21:49	...
<input type="checkbox"/>	Case of Electricity	New	High	09/09/2020 19:25	...

5

1 2 >

## Add Record

### Add Case

**Subject**

**Priority**

**Type**

**Description**

**Status**

### Case Attachments

Maximum upload file size: 2MB.

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

## Detail Page

- Click on any **record** from the List View to view the details of a record. You can edit that record or delete it from the detail view.

### Case

**Subject:** AMC expired but services are pending  
**Priority:** High  
**Type:** Administration  
**Description:** 2 Services are pending but the AMC is expired.

**Case Updates**

**Calls**
**Documents**
**Meetings**
**Notes**

Subject	Attachment	Date Created	Action
Services	Services.jpg	09/16/2020 00:08	...

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

## Case Deflection

- When you have **enabled** the 'Case Deflection' option with the selection of Category, your customers can search for solution by inserting the keyword or a sentence related to their queries/issues by logging in the portal.
- Your customers will be able to see the list of cases by clicking on **Case** module. They can click on + **Add Case** button to add a new case

<input type="checkbox"/>	Subject	Status	Priority	Date Created	Action
<input type="checkbox"/>	New key is required for Plug in	Assigned	High	09/15/2020 23:45	...
<input type="checkbox"/>	Demo URL is not working	New	Medium	09/15/2020 23:43	...
<input type="checkbox"/>	Software .dll file issue	Pending Input	Medium	09/14/2020 1:47	...
<input type="checkbox"/>	VPN Connection issue	New	High	09/14/2020 12:47	...




- After clicking on the + Add button, your customer can find the probable solution by searching the query/issue. The search result will appear as per inserting the search key word.
- The customer can also **print** the solutions by clicking on 'print' icon.

**Cases**

You may find probable solution you're looking, just search it or [Add Case](#)

Lice Search

**Search Result(s) :**

**Licence Flow**   Aug 06, 2020 

- If your customers could not find any probable solution or if they found a solution but it is not relevant to what they were looking for then they can **add** a new **Case**.

## Add Case

Subject

Priority

High ▼

Type


Administration ▼

Description

Status

New ▼

## Case Attachments

 No file chosen

+

Maximum upload file size: 2MB.

**Note:** If You have **disabled** the 'Case Deflection' option in SugarCRM, the customers will get directly redirected to the above page to add a case. They will not get the 'Search Solution' option.

## Attachment Preview

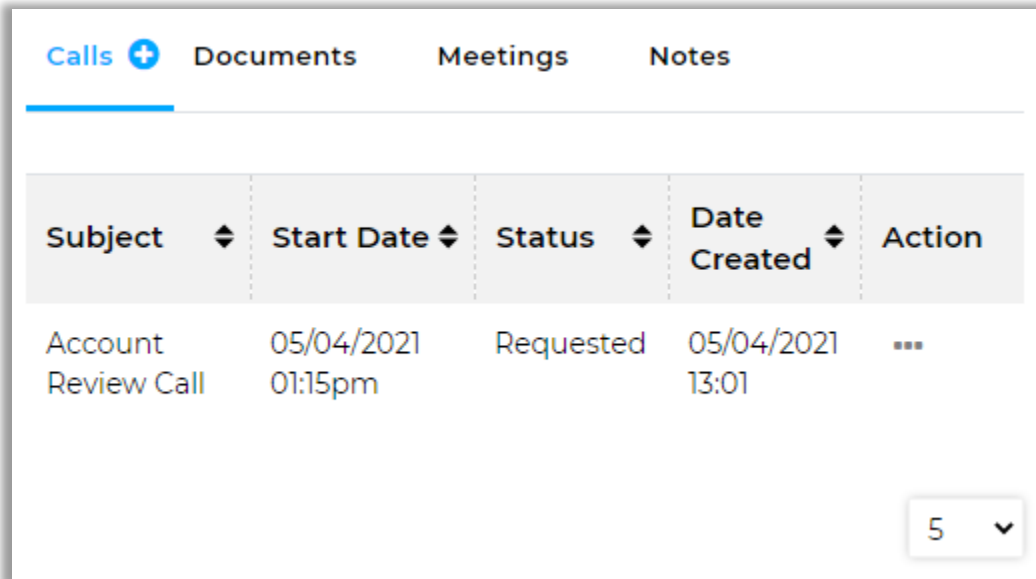
- If any attachments in portal, customer can check and directly access that records by clicking on “Preview” button from the ‘Action’ ... icon.
- You can **download** the attachment and by clicking on the ‘View’, you will navigate to the list view of that module.

The screenshot displays the 'Case' interface in the SugarCRM Customer Portal. On the left, the case details are shown: Subject (New key is required for Plug in), Priority (High), Type (Administration), and Description (Plug in is asking for activation, new key is required). Below this is a 'Case Updates' section with a text input field and a 'Save' button. On the right, there are tabs for 'Calls', 'Documents', 'Meetings', and 'Notes'. The 'Documents' tab is active, showing a table of attachments. A context menu is open over the first document, showing options: 'View', 'Download', and 'Preview'. A red arrow points to the 'Preview' option. The table has columns for 'Document Name', 'File Name', and a date/time column. The first row shows 'Licence Key update steps', 'Plugin\_Installation\_Steps.docx', and '09/16/2020 00:47'. A pagination bar at the bottom of the table shows '5' items per page.

Document Name	File Name	
Licence Key update steps	Plugin_Installation_Steps.docx	09/16/2020 00:47

## Sub-Panel

- Navigate to **Case** module. By clicking on 'Case' ('View' icon), the details page will be redirected. By scrolling down, the customer will find the sub-panel.
- Here the portal users will get the data in the sub-panel based on the selection of the "Relation Type" **Contact** or **Account**.
- By clicking on any subpanel, the customer can see the record which is created by the Admin.



The screenshot displays a sub-panel interface with four tabs: 'Calls' (active), 'Documents', 'Meetings', and 'Notes'. Below the tabs is a table with the following columns: 'Subject', 'Start Date', 'Status', 'Date Created', and 'Action'. A single record is listed with the subject 'Account Review Call', start date '05/04/2021 01:15pm', status 'Requested', and date created '05/04/2021 13:01'. The 'Action' column contains an ellipsis icon. At the bottom right, there is a pagination control showing '5' and a dropdown arrow.

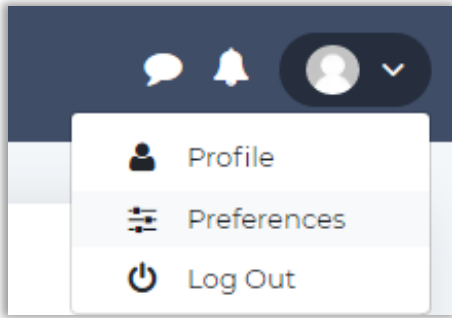
Calls + Documents Meetings Notes				
Subject	Start Date	Status	Date Created	Action
Account Review Call	05/04/2021 01:15pm	Requested	05/04/2021 13:01	...

- Click on the '**View**' icon from the List View by clicking on the 'Action' ... icon 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 'Meetings' will be visible in sub panel which are made portal visible from SugarCRM.

## Preferences

### Dashboard Preferences



- Portal Users get an option to set their required dashboard preference from the Customer Portal.

- To set preferences, they can click on “**preferences**” option from the profile drop-down menu.

**Dashboard Preferences** ⓘ

**Counter blocks (Maximum four modules)**

☒ Accounts ☒ Calls ☒ Cases ☒ Contracts ☐ Documents ☐ Invoices ☐ Meetings

☐ Notes ☐ Products ☐ Proposals ☐ Quotes ☐ Sales Demo

**Recent activities blocks**

☒ Accounts ☒ Calls ☒ Cases ☒ Contracts ☒ Documents ☒ Invoices ☒ Knowledge Base

☒ Meetings ☒ Notes ☒ Products ☒ Proposals ☒ Quotes ☐ Sales Demo

**Charts**

☐ Invoices ☒ Cases ☐ Quotes

**Today's schedule blocks**

☒ Enable

- They can enable/disable preferences for dashboard as per requirement.

**Note:** When the customer will log in, they can see the preference as admin has set.

### Notification Preferences

- By scrolling down in Dashboard Preferences, your customers can set the preferences for the Notification.
- Our login portal provides you the functionality to view notification which helps you to identify latest updates.

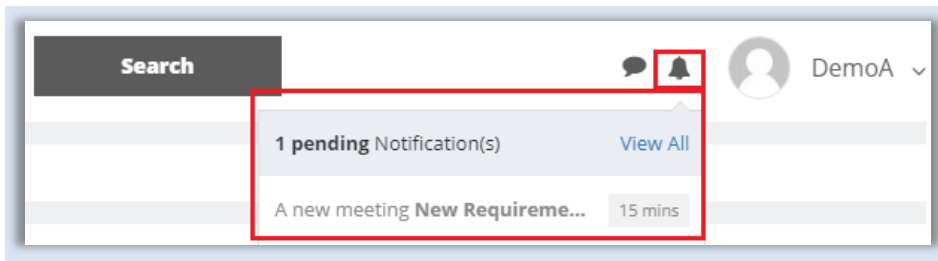
The screenshot shows the 'Dashboard Preferences' window with the 'Notifications Preferences' section expanded. It lists various entities with checkboxes for 'Create' and 'Status Change' notifications.

Entity	Create	Status Change
Calls	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	-
Invoices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Meetings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Proposals	-	<input checked="" type="checkbox"/>
Quotes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Case Updates	<input checked="" type="checkbox"/>	-

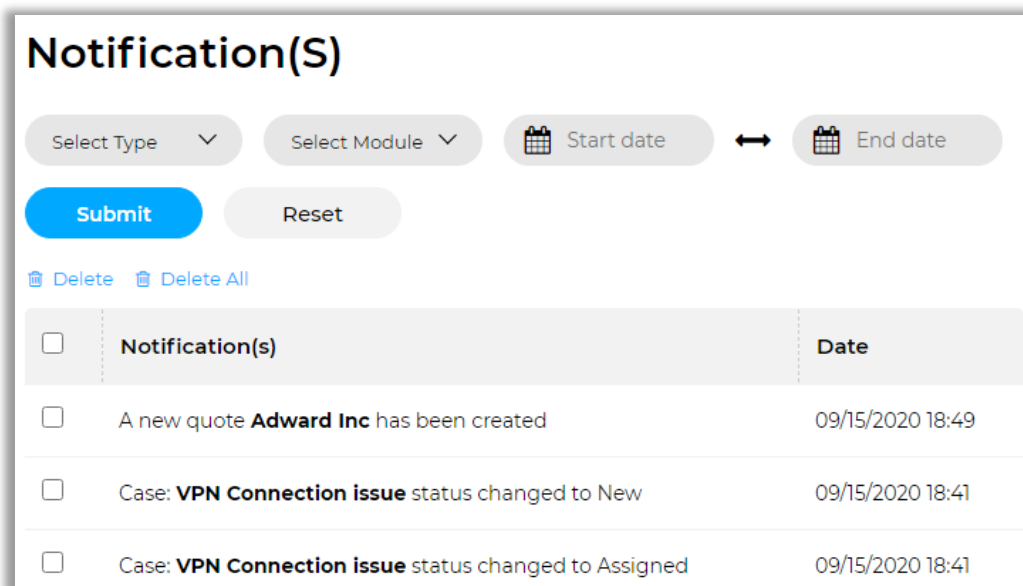
- **Create:** If you perform any actions, the customers will get the notification if they are in that User Group. *E.g.* if new meeting is created by you, the customer will get notification related to the meeting.
- **Status Change:** If Status is changed by you, they will get notification.



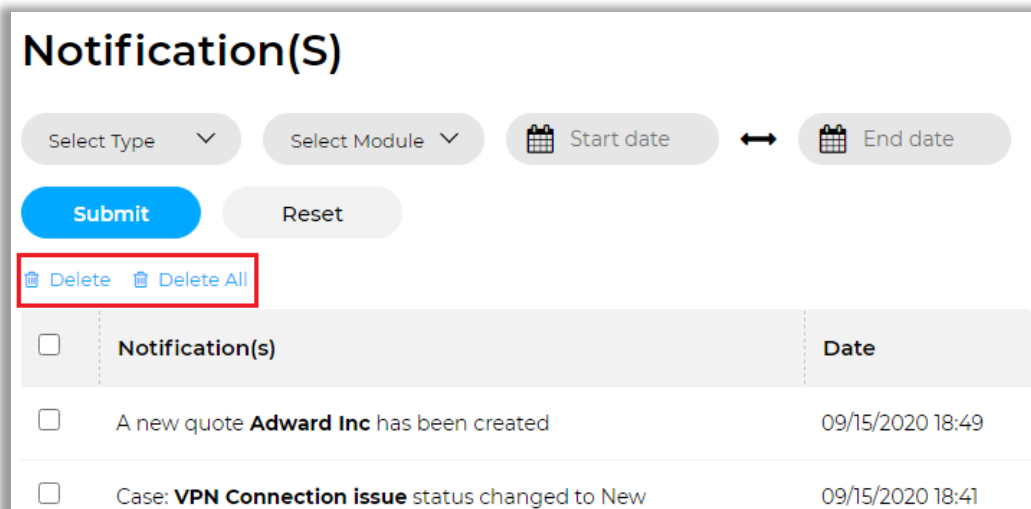
## Notification



- By clicking on the **Notification** 'icon', the customers will get the notification with the highlighted details as shown above image.
- By clicking on the **View All** option, the customers can see all the notification in detail.



- The 'Delete' option is also given if the portal user want to delete any notification.



- 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.

## Notification(S)

Case Updates

Select Type

Create

Status Change

Case Updates

Select Module

Select Module

Calls

Cases

Documents

Invoices

Meetings

Proposals

Quotes

Sales Demo

2020-09-16

↔

End date

Submit

Reset

	Date
<input type="checkbox"/>	Notification(s)
<input type="checkbox"/>	A new quote A
<input type="checkbox"/>	Case: <b>VPN Connection issue</b> status changed to Assigned
<input type="checkbox"/>	Case: <b>VPN Connection issue</b> status changed to Assigned

- 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

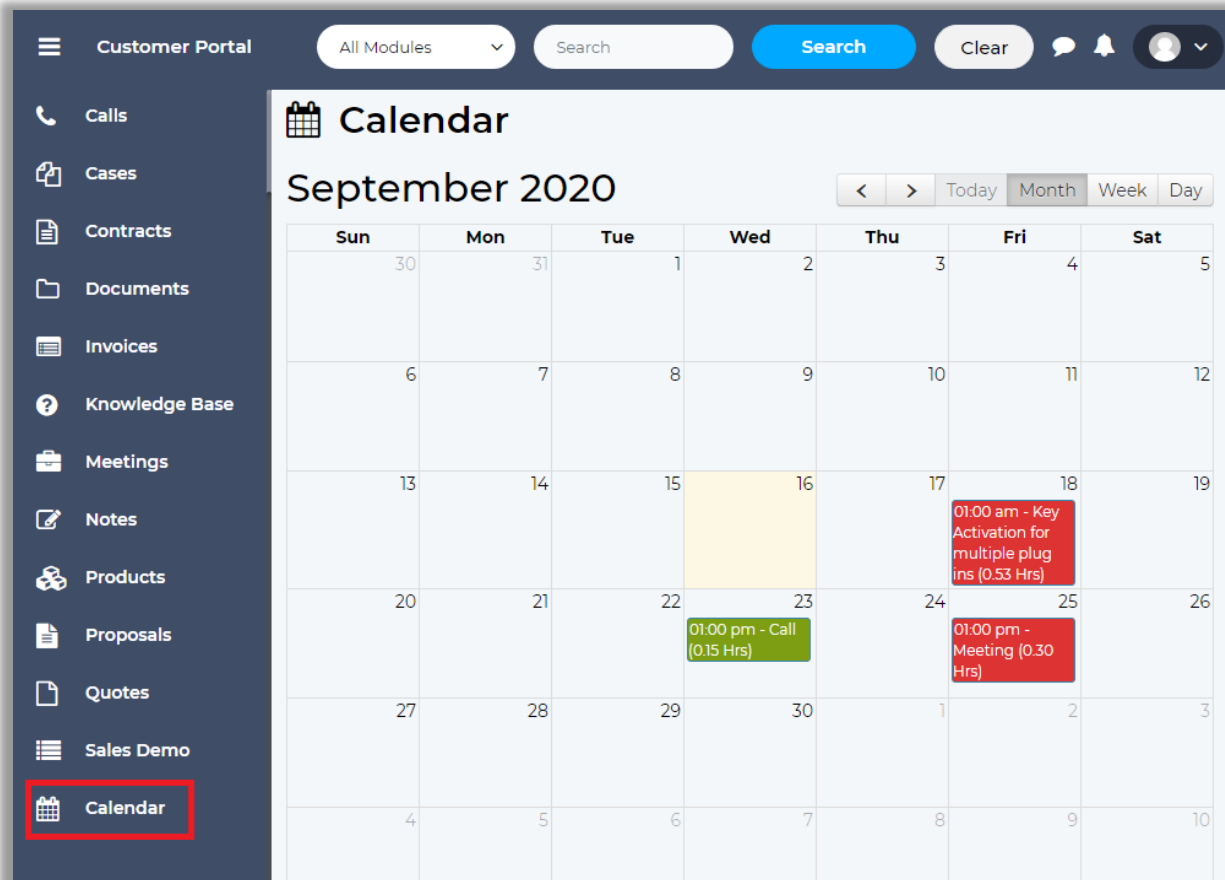
- By using feedback section, a portal user can add feedback.

The screenshot shows the SugarCRM Customer Portal interface. At the top, there is a dark blue navigation bar with a dropdown menu labeled 'All Modules', a search bar with the text 'Search', a blue 'Search' button, a 'Clear' button, a speech bubble icon (highlighted with a red box and a red arrow pointing to the 'Subject' field), a bell icon, and a user profile icon. Below the navigation bar is the 'Feedback' form. The form has a title 'Feedback' and two sections: 'Subject: \*' and 'Description: \*'. The 'Subject' field is a text input containing 'User Friendly'. The 'Description' field is a larger text area containing 'The customer Portal seems user friendly.' and a green circular icon with a 'G' in the bottom right corner. A blue 'Submit' button is located at the bottom left of the form.

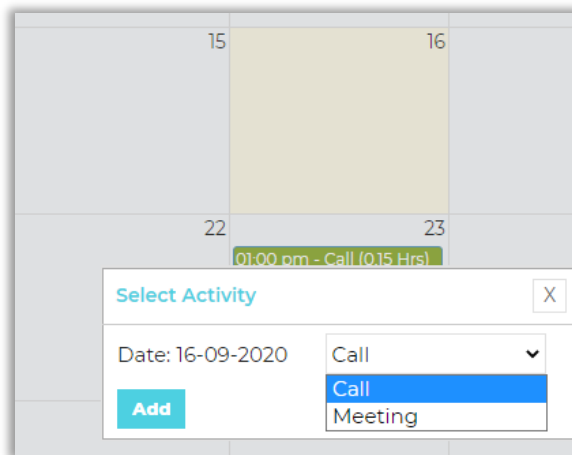
- Add subject and description for feedback and save. It will get related to this particular contact in CRM. So, in contacts you will get sub-panel of feedback where there will be a list of feedbacks added by that portal user.
- Portal user can also add multiple feedback from portal as an when require.

## Calendar Page

- If you have enabled the **Calendar** option from the SugarCRM Configuration, the Calendar will be displayed to your portal users.
- By clicking on it, the calls and meetings records can be seen on the calendar as per the records date with time by your customers.

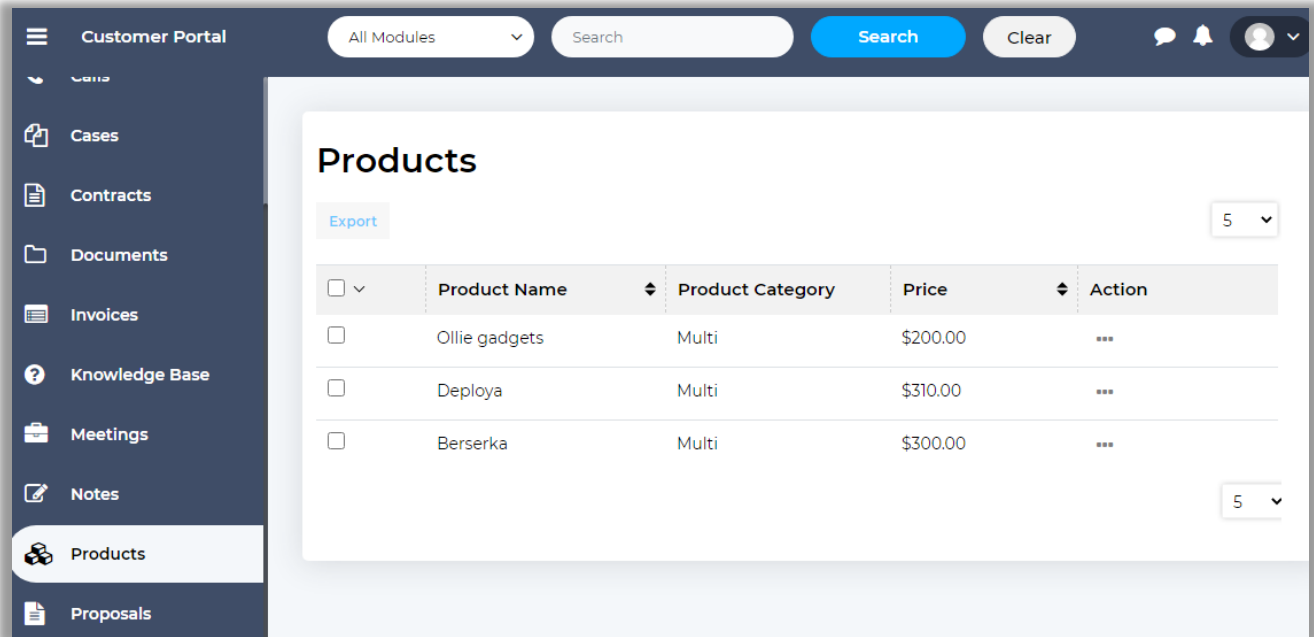


- Click on any date and schedule activity as per your requirement.

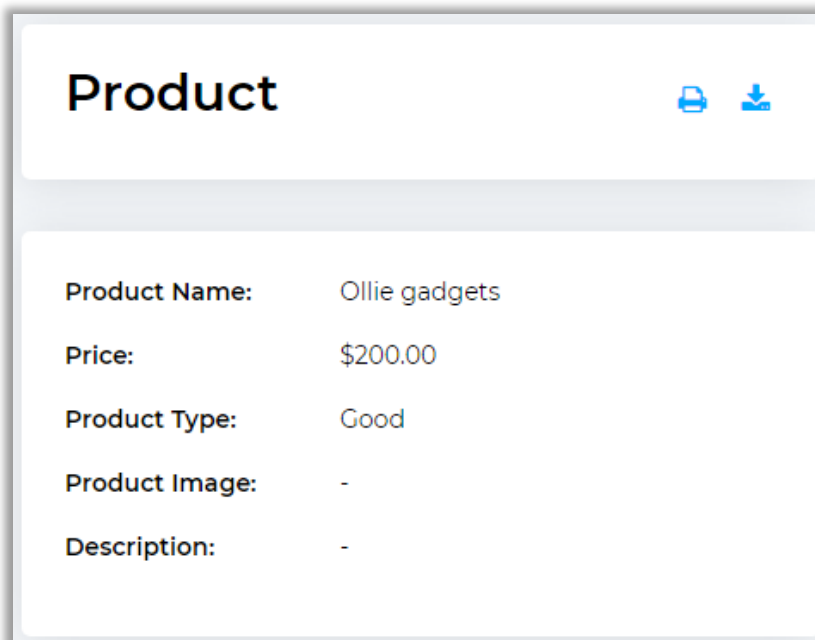


## Product Page

- View the list of products from product page.



- You can also navigate to detail view and find out the details of that specific product.



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

The screenshot shows the 'Product Catalog' form in SugarCRM. The form is for a product named 'Johnnie Gadget'. The 'Portal Visible' checkbox is checked and highlighted with a red box. The form includes various fields for product details, pricing, and support information.

Product Name	
Johnnie Gadget	
Vendor Part Number	
Weight	40.00
Cost	\$ (USD) 525.00
Date-Cost-Price	mm/dd/yyyy
Discount Price USD	\$923.67
List USD	\$933.00
Description	
Support Name	
Support Contact	
Teams	Global
Portal Visible	<input checked="" type="checkbox"/>

Additional fields and values visible in the form:

- Type: Select Product Type...
- Cost USD: \$525.00
- Unit Price: \$923.67
- List Price: \$ (USD) 933.00
- Default Pricing For...: Discount from List
- Percentage(%): 1
- Support Desc:
- Support Term: Select...
- Tags:

## Proposals

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

**Add Proposal**

Name: Product Purchase

Description: Inquiry for a better price

**Products** Search by Product Name

Product Name	Product Category	Price	Qty	Total
<input checked="" type="checkbox"/> Ollie gadgets	Multi	\$200.00	2	\$400.00
<input checked="" type="checkbox"/> Deploya	Multi	\$310.00	4	\$1240.00
<input checked="" type="checkbox"/> Berserka	Multi	\$300.00	9	\$2700.00

**Services** Product Purchase with AMC

Save Cancel

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

**Proposals** + Add

BULK ACTION 5

<input type="checkbox"/>	Name	Date Created	Proposal Status	Action
<input type="checkbox"/>	Product Purchase	09/16/2020 09:36	Pendi	...
<input type="checkbox"/>	Product exchange	09/14/2020 14:00	Converted	...

5

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

Proposals (6)				
Filter	Create	Search by name...		
	Name	Proposal Status	Assigned to	
☆	Product Inquiry	Converted		
☆	Product exchange	Converted	Administrator	
☆	Product Purchase	Pending	Administrator	
☆		Pending		Generate Quote
☆		Pending		Delete
☆		Pending		

**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.

Quotes						
Export	5					
<input type="checkbox"/>	Quote Subject	Quote Stage	Quote Number	Date Created	Grand Total	Action
<input type="checkbox"/>	Product exchange	Confirmed	6	09/16/2020 10:05	\$836.00	...
<input type="checkbox"/>	Product Purchase	Draft	5	09/16/2020 10:04	\$13,798.00	...
5						



## View Quotes, Invoices and Contracts





- Your customers can View or Download Quotes, Invoices and Contracts added by admin from SugarCRM side in Portal.

Quotes						
<a href="#">Export</a>						5 ▾
<input type="checkbox"/> ▾	Quote Subject ▴ ▾	Quote Stage ▴ ▾	Quote Number ▴ ▾	Date Created ▴ ▾	Grand Total ▴ ▾	Action
<input type="checkbox"/>	Product exchange	Confirmed	6	09/16/2020 10:05	\$836.00	...
<input type="checkbox"/>	<b>Product Purchase</b>	Confirmed	5	09/16/2020 10:04	\$13,798.00	...
						5 ▾

- To download the PDF version of Quotes, Invoices or Contracts click on the download icon under 'Actions' column.

## Accept or Decline Quote from Portal



- By clicking on Quote, user can verify the details of Quote.
- A button to accept or decline the quote will appear in the detail view of a quote when it reaches "confirmed" stage.

Quote		<div>   <div>   </div> </div>					
Quote Subject:	Product Purchase						
Quote Number:	5						
Quote Stage:	Confirmed						
Valid Until:	09/16/2020						
Payment Terms:	-						
Shipping Account Name:	-						
Billing Account Name:	Demo Account						
Billing Address:	-						
Shipping Address:	-						
Grand Total:	\$13,798.00						
Description:	-						
		Quantity	Quoted Line Item	Cost	List	Unit Price	Total Discount
		- 9	Tamica Gadget	\$567.00	\$978.00	\$978.00	\$0.00%
		- 4	Lettie Gadget	\$365.00	\$831.00	\$831.00	\$0.00%
		- 2	Mitchell Gadget	\$451.00	\$836.00	\$836.00	\$0.00%
		- 1	Product Installation with AMC	\$0.00	\$0.00	\$0.00	\$0.00%
						Subtotal:	\$13,798.00
						Tax:	\$0.00
						Shipping:	\$0.00
						Total:	\$13,798.00
						Currency:	USD
						Subtotal:	\$13,798.00

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- If user 'Accept' the **Quote**, the status will be updated to **"Closed Accepted"**.

### Quote

Status: Closed Accepted

**Quote Subject:** Product Purchase

**Quote Number:** 5

**Quote Stage:** Confirmed

**Valid Until:** 09/16/2020

**Payment Terms:** -

**Shipping Account Name:** -

**Billing Account Name:** Demo Account

**Billing Address:** -

**Shipping Address:** -

**Grand Total:** \$13,798.00

**Description:** -

	Quantity	Quoted Line Item	Cost	List	Unit Price	Total Discount
-	9	Tamica Gadget	\$567.00	\$978.00	\$978.00	\$0.00%
-	4	Lettie Gadget	\$365.00	\$831.00	\$831.00	\$0.00%
-	2	Mitchell Gadget	\$451.00	\$836.00	\$836.00	\$0.00%
-	1	Product Installation with AMC	\$0.00	\$0.00	\$0.00	\$0.00%
					<b>Subtotal:</b>	<b>\$13,798.00</b>
					<b>Tax:</b>	<b>\$0.00</b>
					<b>Shipping:</b>	<b>\$0.00</b>
					<b>Total:</b>	<b>\$13,798.00</b>
					<b>Currency:</b>	<b>USD</b>
					<b>Subtotal:</b>	<b>\$13,798.00</b>

- After accepting the Quote, the 'Proposal Status' will also change to **Converted**.

## Proposals

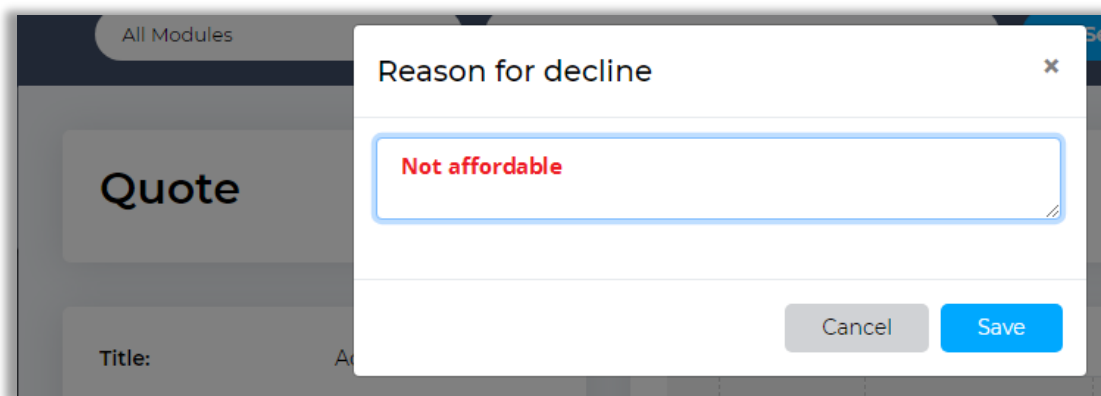
+ Add

BULK ACTION ▾5 ▾

<input type="checkbox"/> ▾	Name	Date Created	Proposal Status	Action
<input type="checkbox"/>	Product Purchase	09/16/2020 09:36	Converted	...
<input type="checkbox"/>	Product exchange	09/14/2020 14:00	Converted	...

5 ▾

- Similarly, you can also see the **Status** in your SugarCRM portal as Closed Accepted and Converted.
- But if the customer **declines** the 'Quote', they must add a **Reason for Decline**.



- The status in 'Quote' will be updated as **Closed Lost**.

## Quote

Status: Closed Lost

**Title:** Product Inquiry (in bulk)

**Payment Terms:** Nett 15

**Quote Number:** 9

**Quote Stage:** Closed Lost

**Valid Until:** 10/16/2020

**Invoice Status:** Not Invoiced

	Quantity	Product/Service	List
1	4	Ollie gadgets	\$190.00
2	8	Berserka	\$280.00
3	6	Deploya	\$300.00
4	-	Product	\$0.00

- Similarly, you can also see the **Status** in you 'SugarCRM portal' as **Closed Lost**.

**Note:** The customer can see the 'Rejection History' field because admin has selected during Portal Layout setup.

- Later, you can **edit** the "Quotation" on the basis of rejection reason and resend the same to User.
- 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.

## Custom Modules

- If you have added any Custom Module and enabled as well from the CRM side for the customer portal, your customer will get the custom module and add/edit/check the records as per the accessibility rights.

The screenshot shows the 'Edit Sales Demo' form within the SugarCRM Customer Portal. The interface features a dark blue sidebar on the left with a menu of modules: Cases, Contracts, Documents, Invoices, Knowledge Base, Meetings, Notes, Products, Proposals, Quotes, Sales Demo (highlighted), and Calendar. The top navigation bar includes a search bar, a 'Search' button, and a 'Clear' button. The main content area displays the 'Edit Sales Demo' form with the following fields:

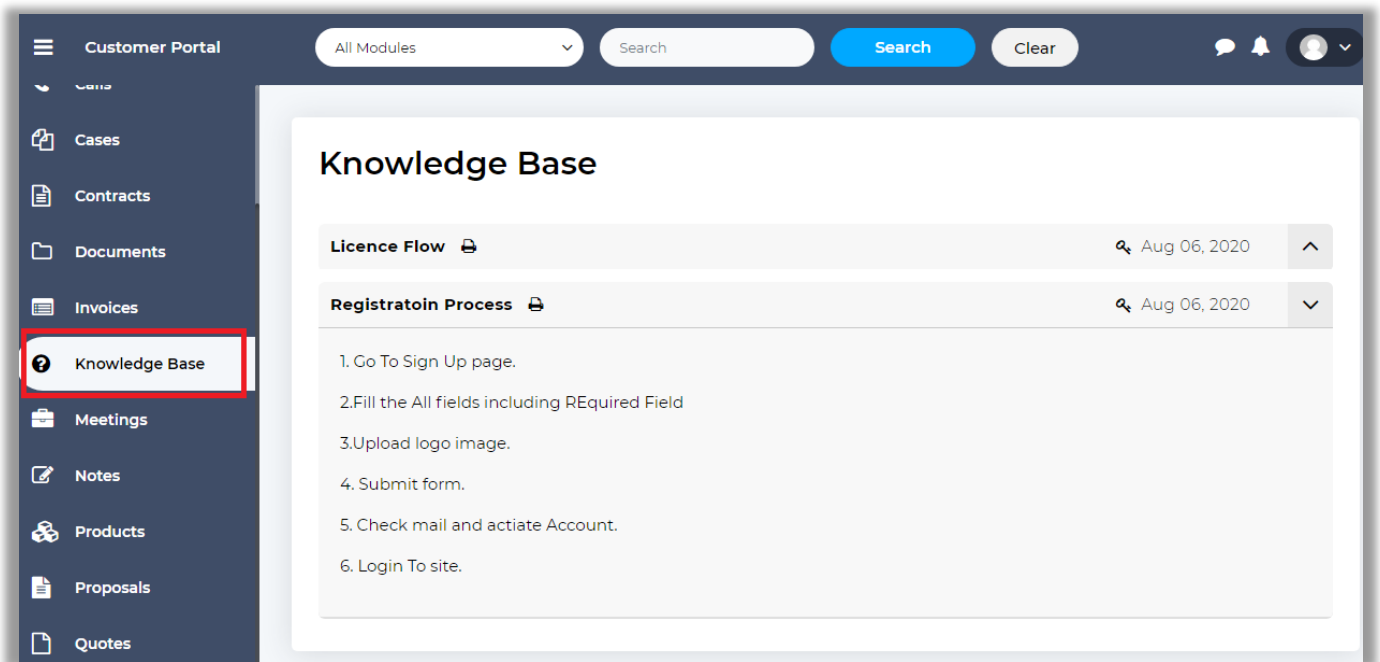
- Name:** CRM Jetty Customer Portal Demo
- Description:** CRM Jetty Customer Portal Demo
- DateTime:** 09/18/2020 09:03
- Custom Image:** Choose File | No file chosen. Below this, it states 'Maximum upload file size: 1MB.'
- Country:** US
- State:** A dropdown menu with options: --None--, NewYork (highlighted), and Dallas.

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

- As per your portal layout settings for list view / detail view, you will get the layout with the details. You will also get the Dynamic Dropdown option if you added that fields.

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

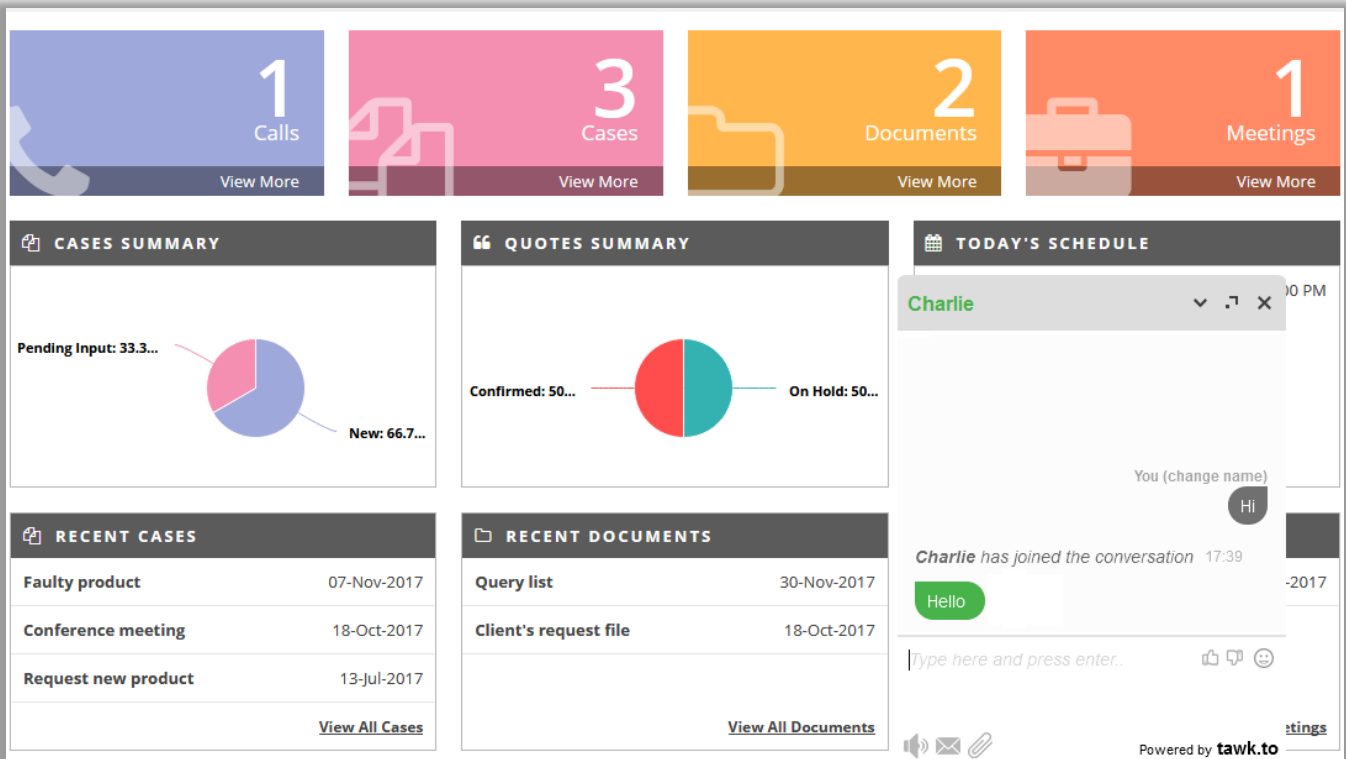
## Profile

- Customers can see their profiles and update the details. Customer can change the profile picture by clicking on the **Change Image** caption and change the password as well.

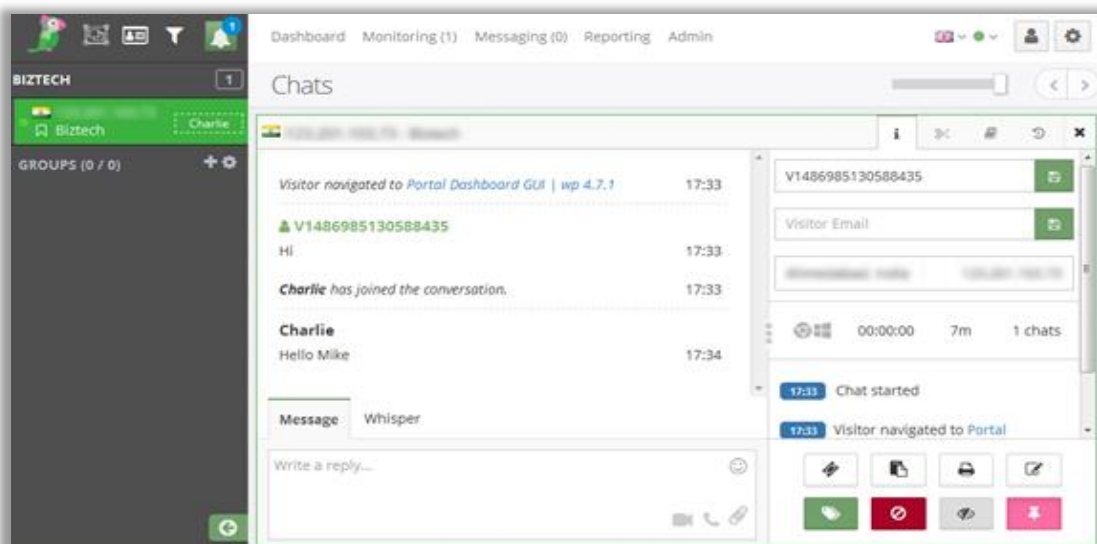
The screenshot displays the user profile management interface. At the top, a dark navigation bar contains a dropdown menu for 'All Modules', a search bar, and a user profile icon. The main content area is split into two panels. The left panel, titled 'Profile', features a user profile card with a 'Change image' button highlighted by a red box. Below the card are input fields for various user details: Username, First Name (Jack), Last Name (Samuals), Office Phone, Mobile, Fax, Job Title, Birthdate, testtime, Test Parent (set to --None--), test child (set to --None--), and Email Address. The right panel, titled 'Change Password', includes input fields for Old Password, New Password, and Confirm Password, with an 'Update' button at the bottom.

## 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](mailto:support@crmjetty.com) Or you can login to your account @ [www.crmjetty.com](http://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](mailto:sales@crmjetty.com)