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.

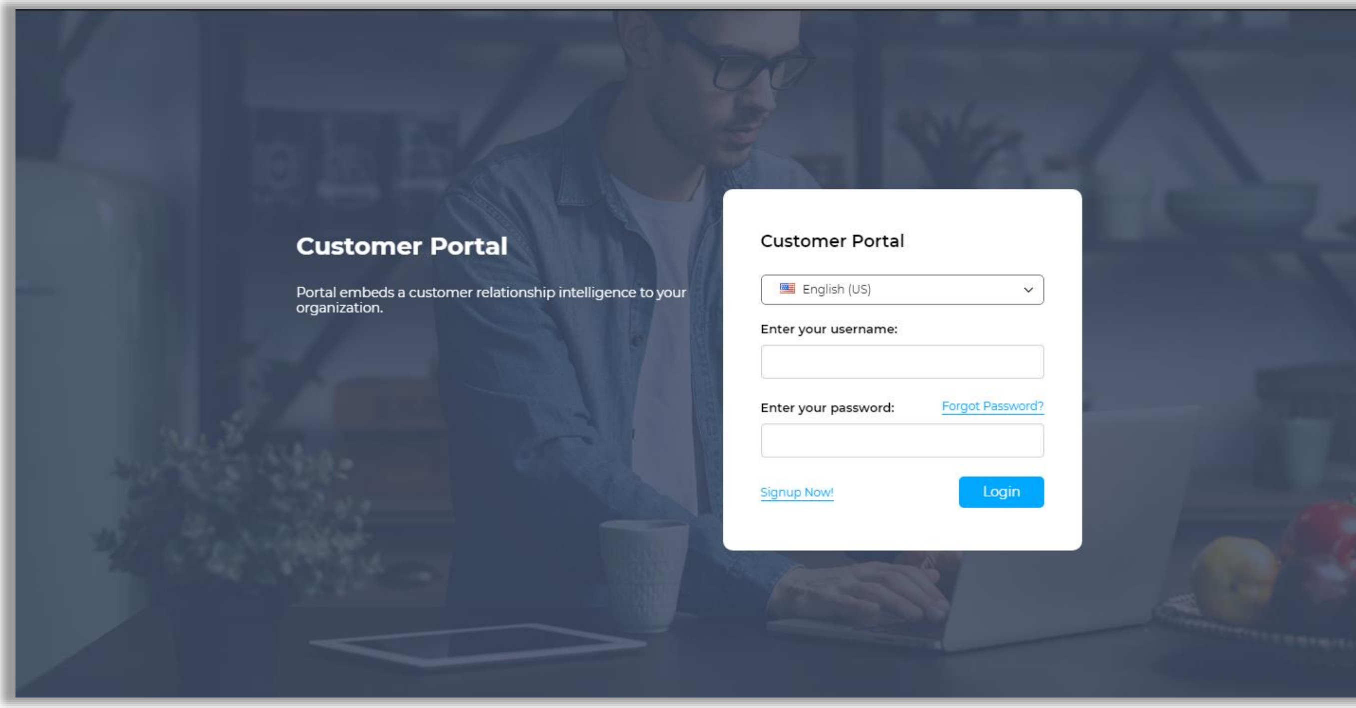
Manual

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

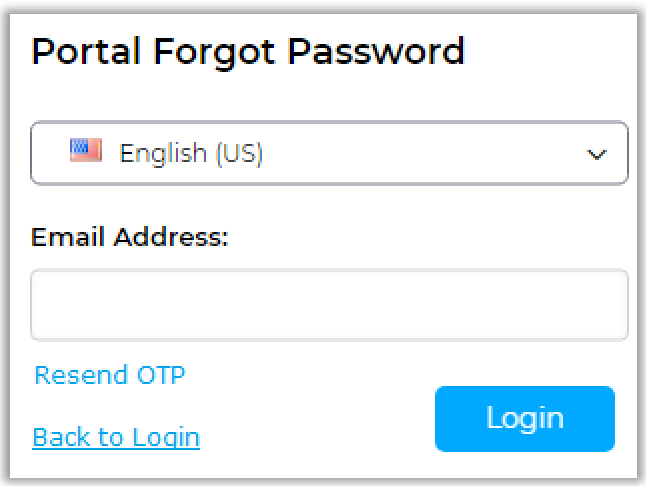
Customer Portal

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.



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

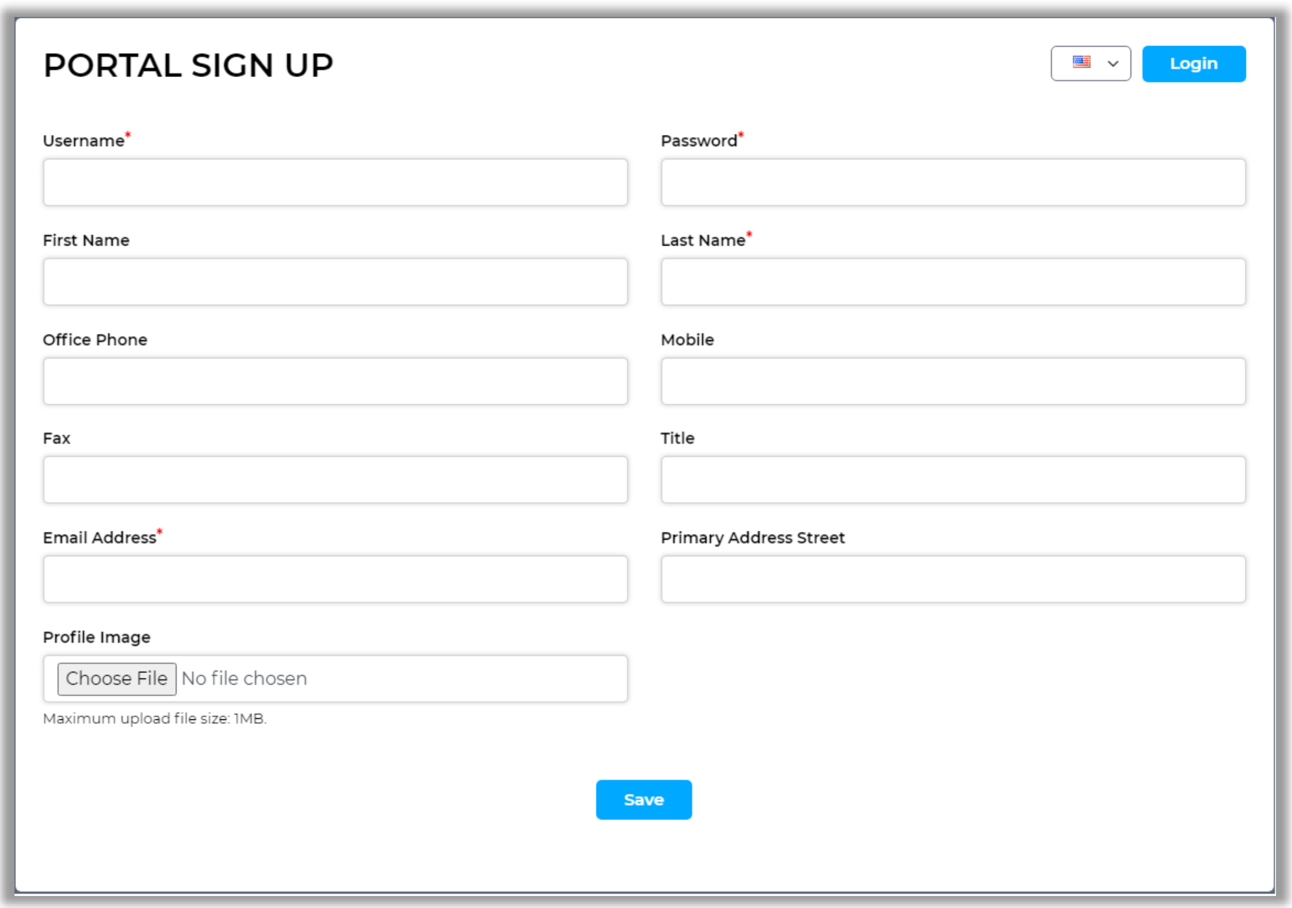
Sign Up

- 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.

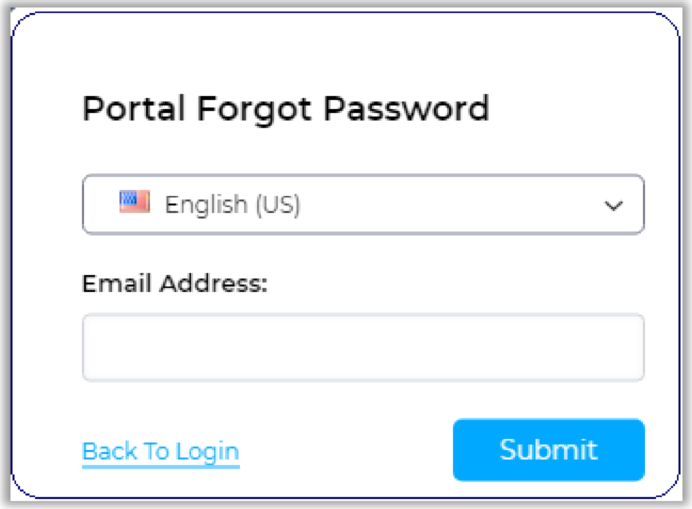
Note: Already existing customers on both sides (WordPress and Sugar) won't get the access for Customer Portal automatically on installation.



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

Forgot Password

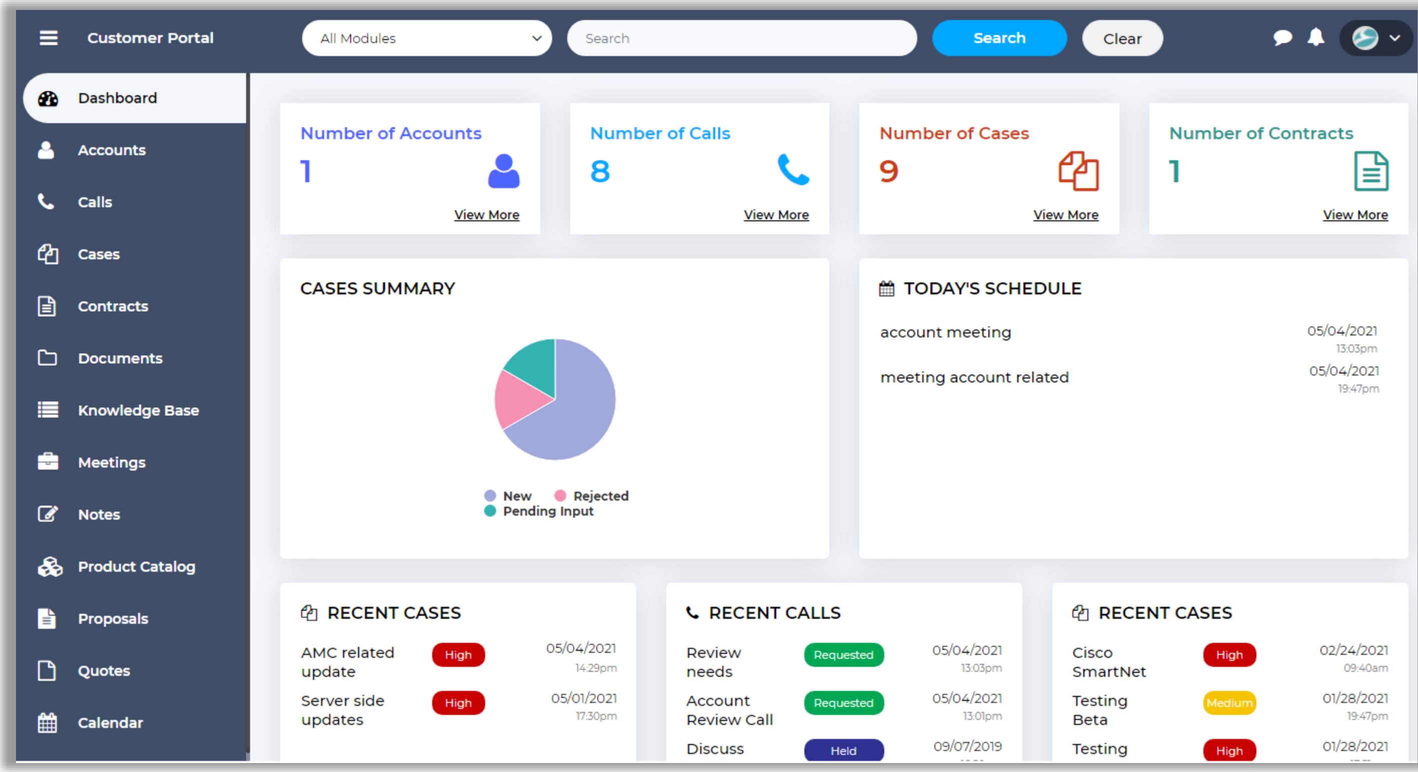
- You can retrieve your login password using the **'Forgot Password'** Option. Click on **'Forgot Password'** option and enter your username and email address. Click on **'Submit'** button and you will receive your password on your email.



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

Portal Dashboard

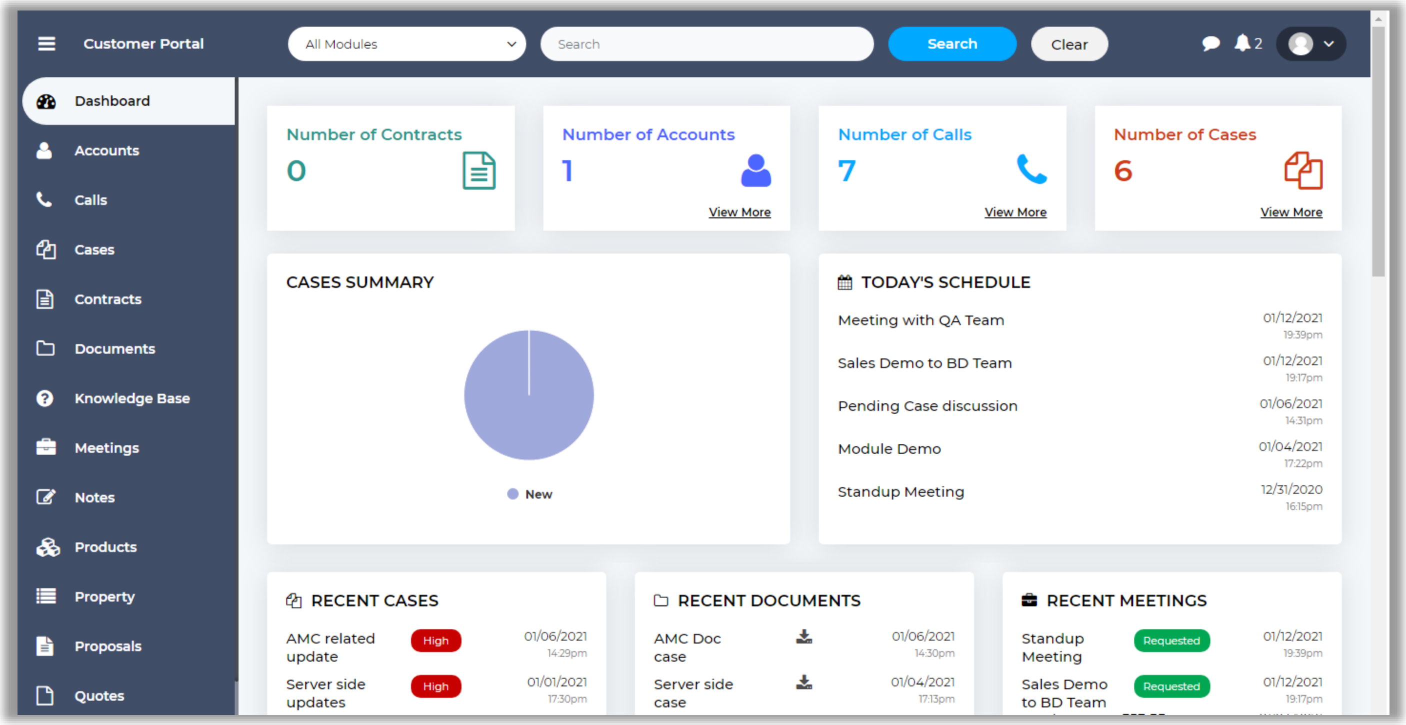
- Dashboard includes recent activities and today's schedule for viewing your whole day schedule.
- WordPress admin can set the accessibility to recently added records for portal users. Accordingly, those modules with their recent records will be displayed on the dashboard.
- Quickly access top modules 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.

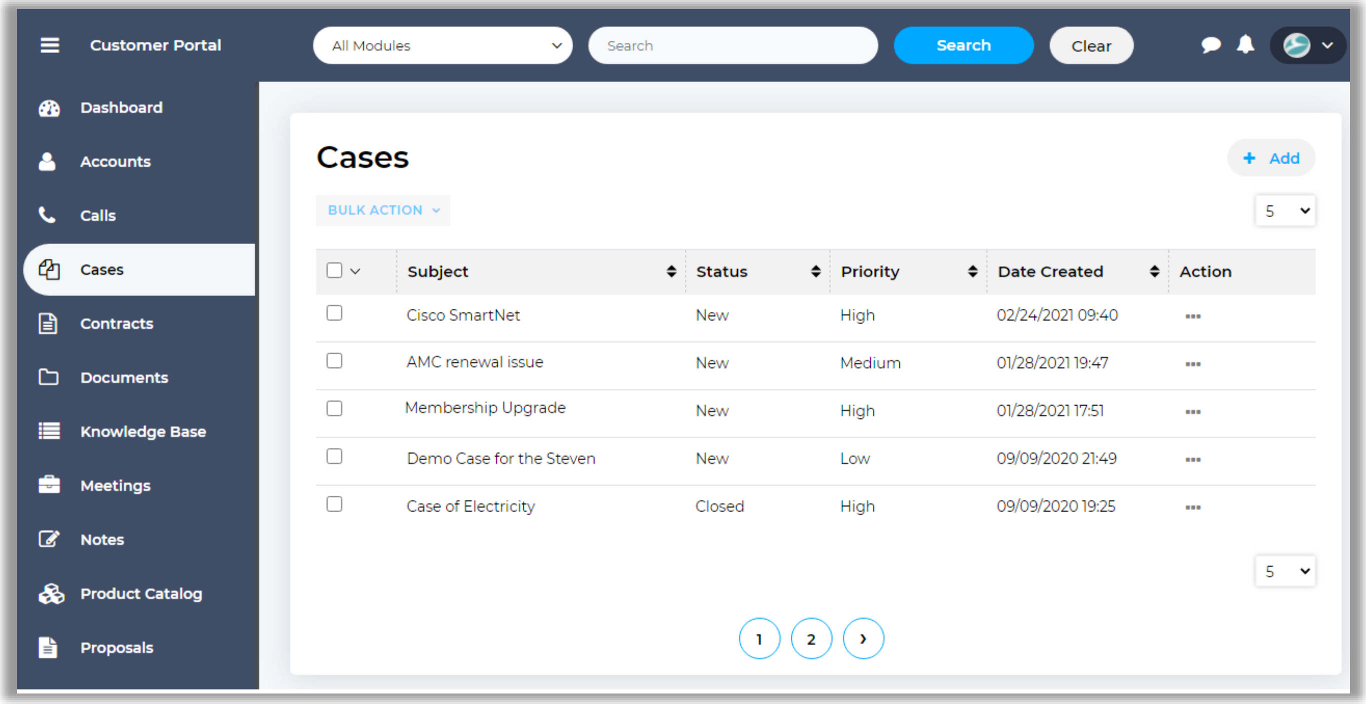
Note: For the Note, Meeting, and Call modules, the data will be loaded based on the relationship with the account and accounts related to all contacts data of the contact portal logged-in Contact.

- 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.

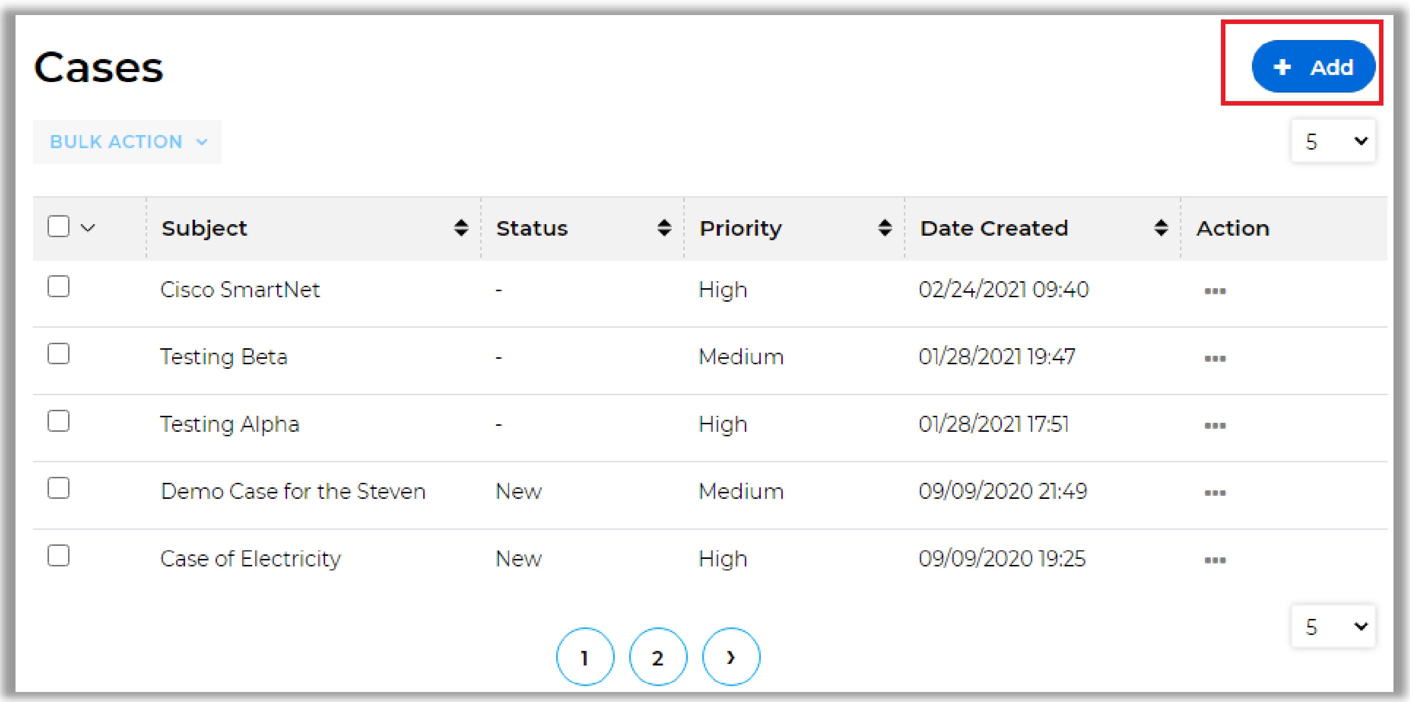


List View

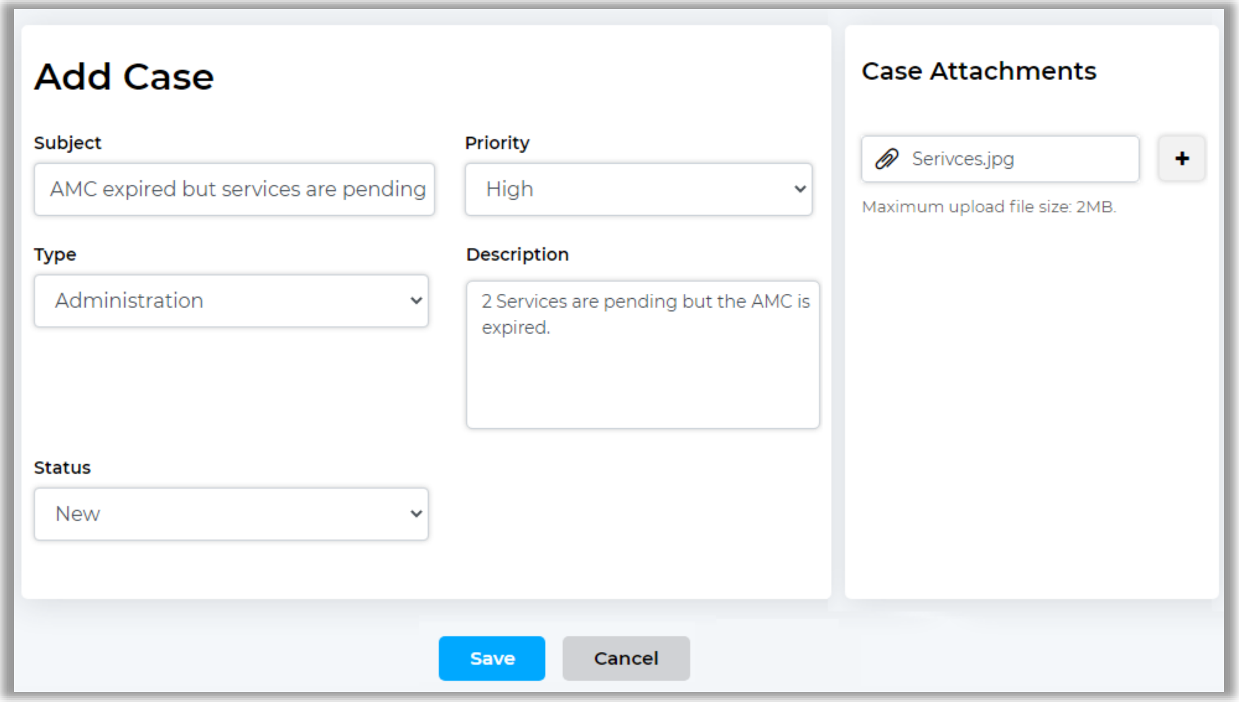
- Navigate to any module and you will be able to see the list of records of that module. You can search a record from the list view, delete it, export CSV or update it.
- You will get data of any module in the listing page as per the selection of the “Relationship Type”, either based on Contact or Account.



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



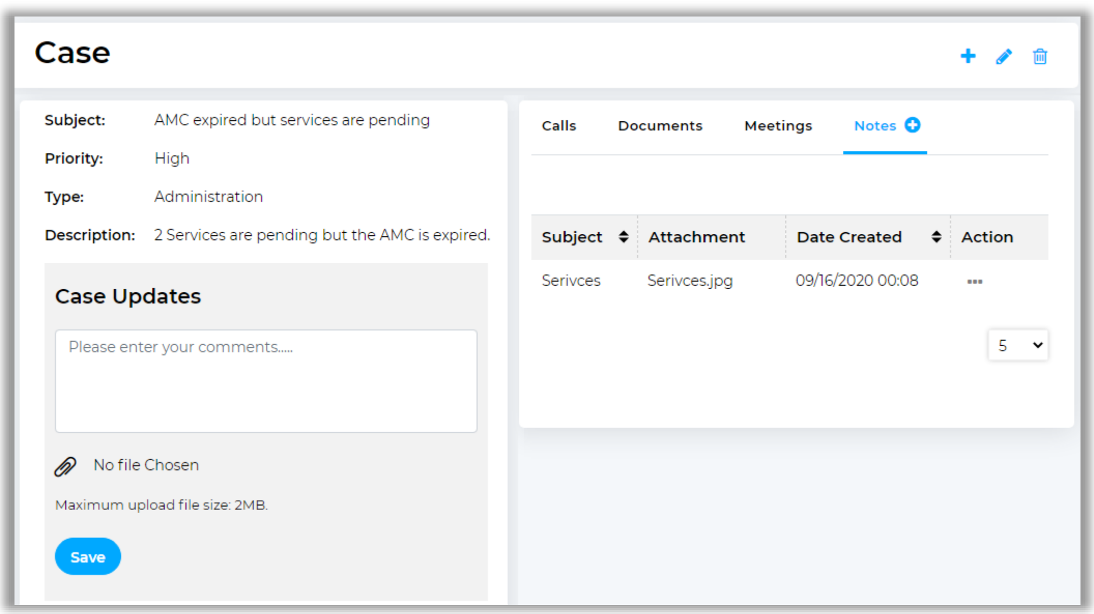
Add Record



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

Detail Page

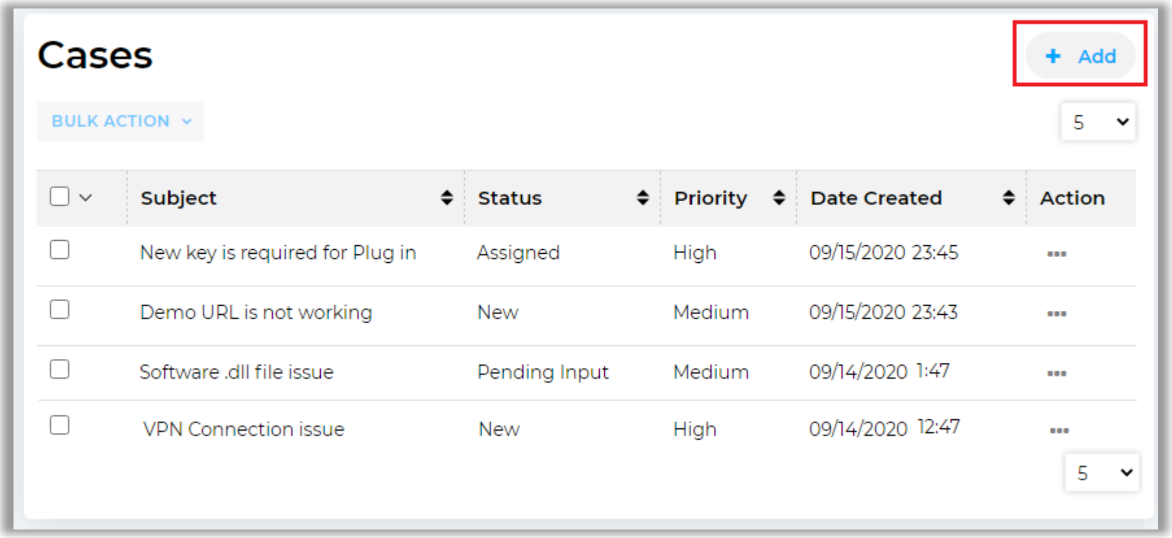
- Click on any **record** from the List View to view the details of a record. You can edit that record or delete it from the detail view.



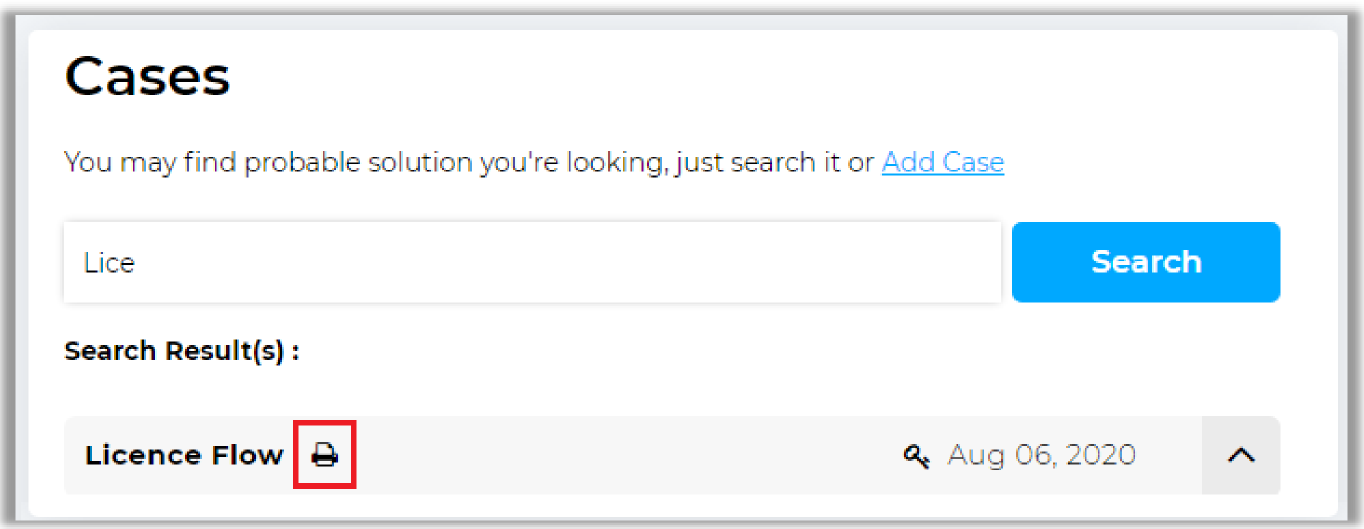
- Portal user can also print details from details view for specific modules like documents, Attachments, Notes, Quotes, Invoices and KB articles.

Case Deflection

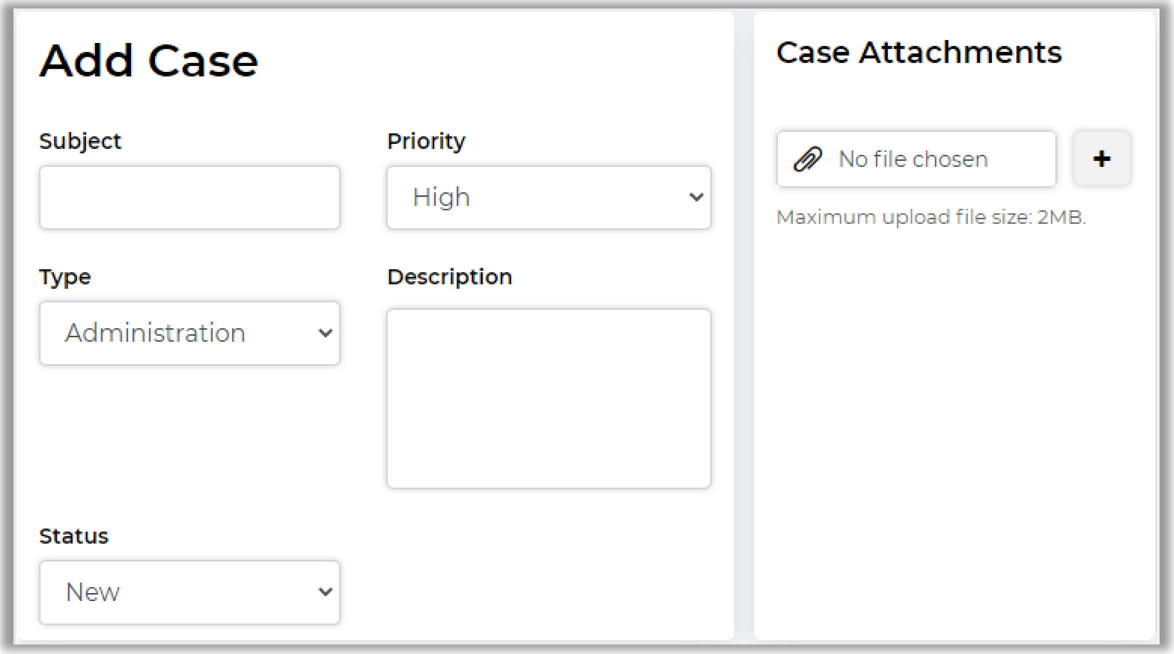
- When you have **enabled** the 'Case Deflection' option with the selection of Category, your customers can search for solution by inserting the keyword or a sentence related to their queries/issues by logging in the portal.
- Your customers will be able to see the list of cases by clicking on **Case**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



- 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.



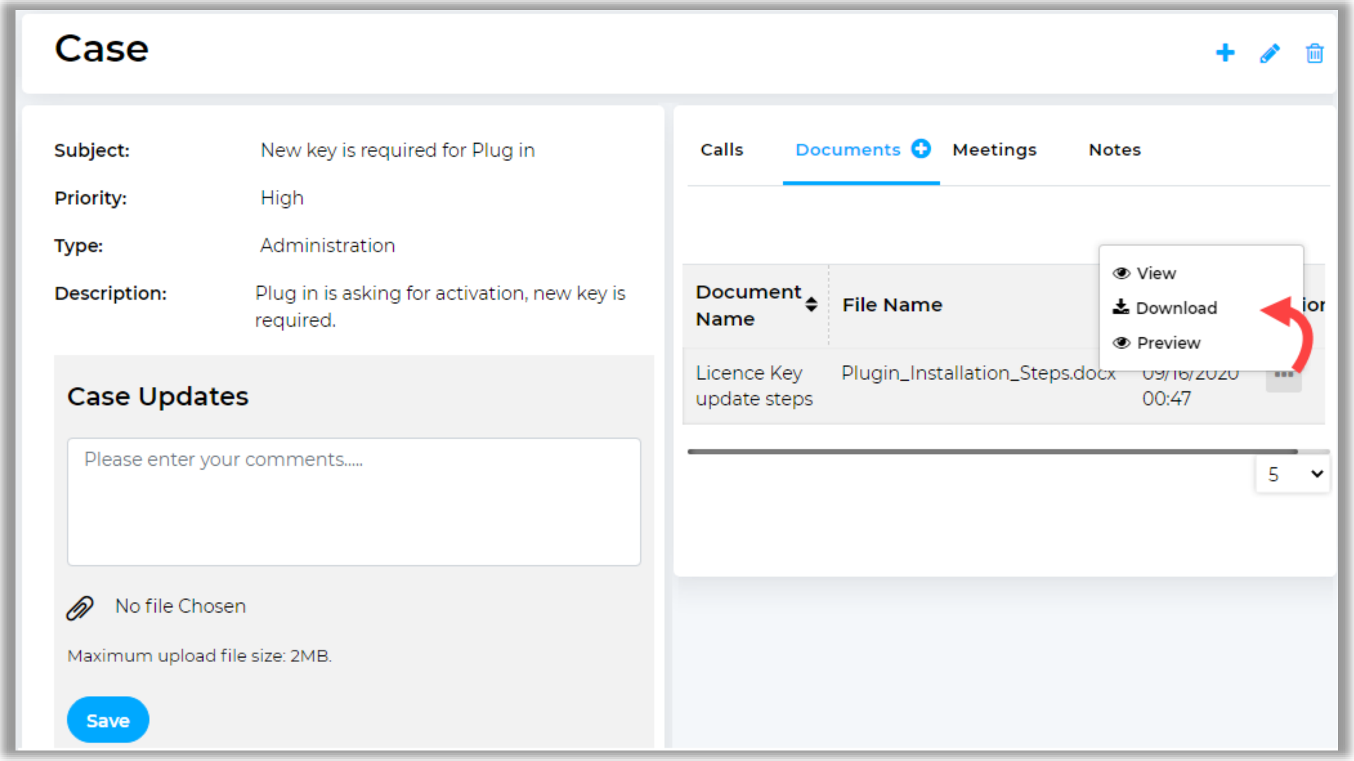
- If your customers could not find any probable solution or if they found a solution but it is not relevant to what they were looking for then they can **add** a new **Case**.



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.

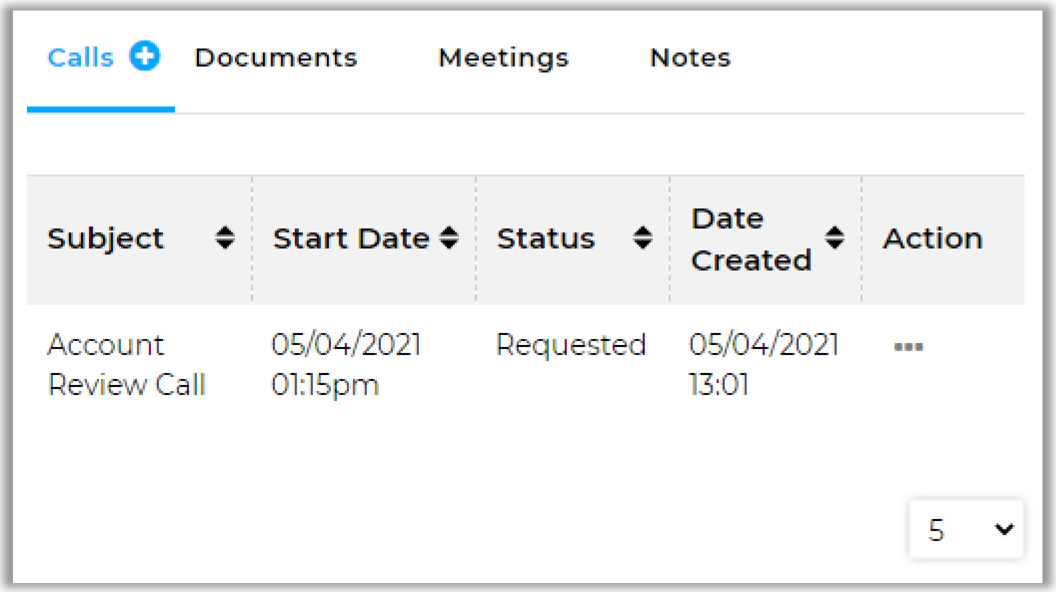
Attachment Preview

- 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.



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.

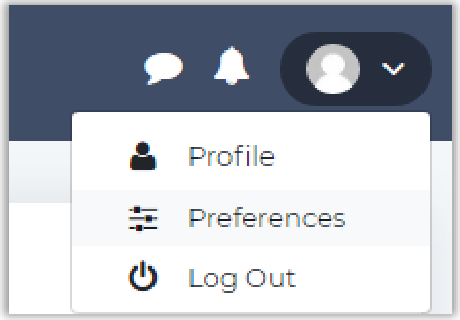


- Click on the **'View'** icon from the List View by clicking on the 'Action' **...** icon and navigate to details of a record. You will find sub-panel related to that record in detail view.
- You can also add record from sub-panel view or navigate to detail view of that listed record.

Note: Only those 'Calls' and 'Meetings' will be visible in sub panel which are made portal visible from SugarCRM.

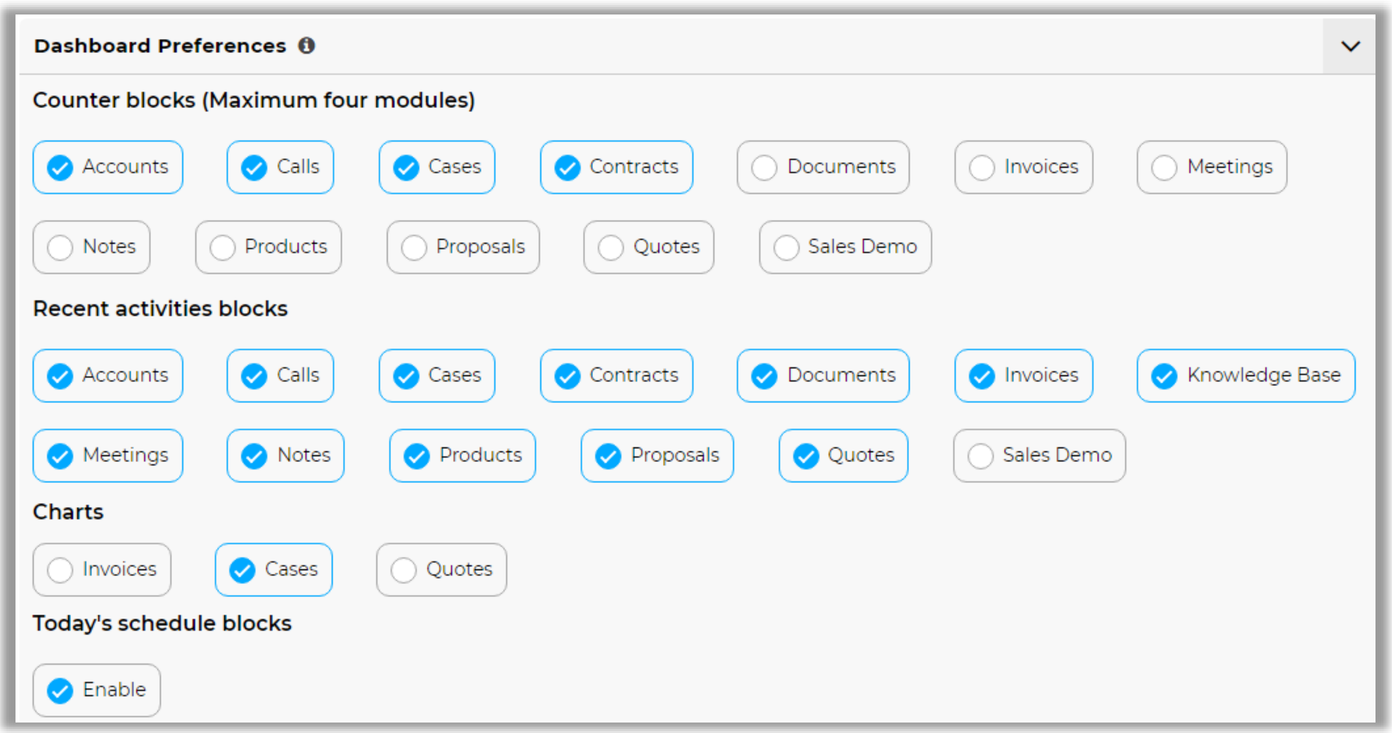
Preferences

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.

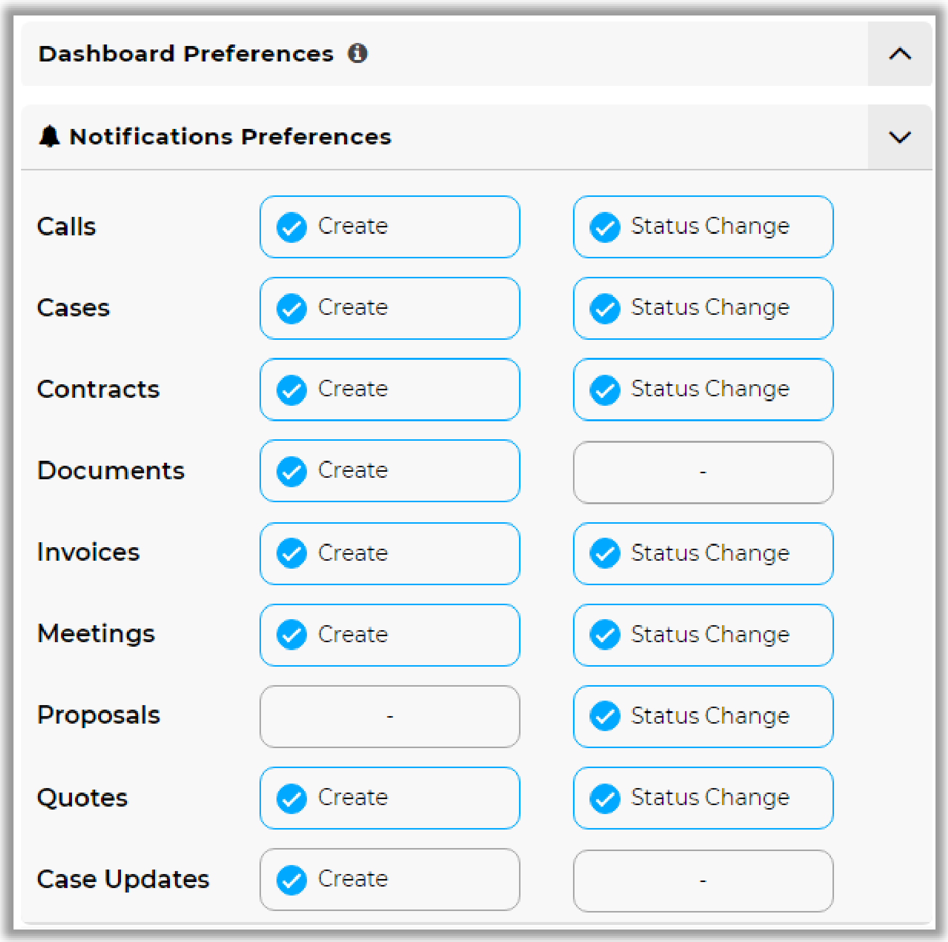


- They can enable/disable preferences for dashboard as per requirement.

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

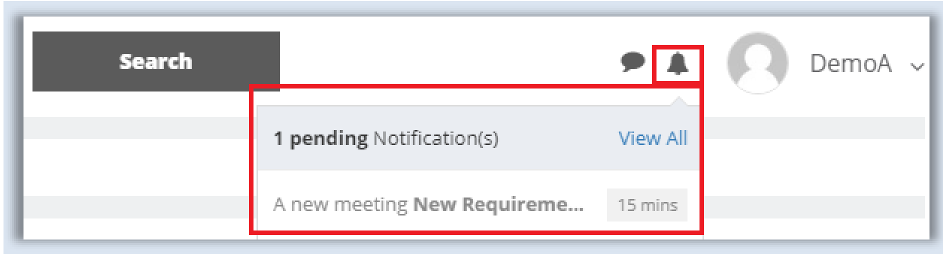
Notification Preferences

- 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.

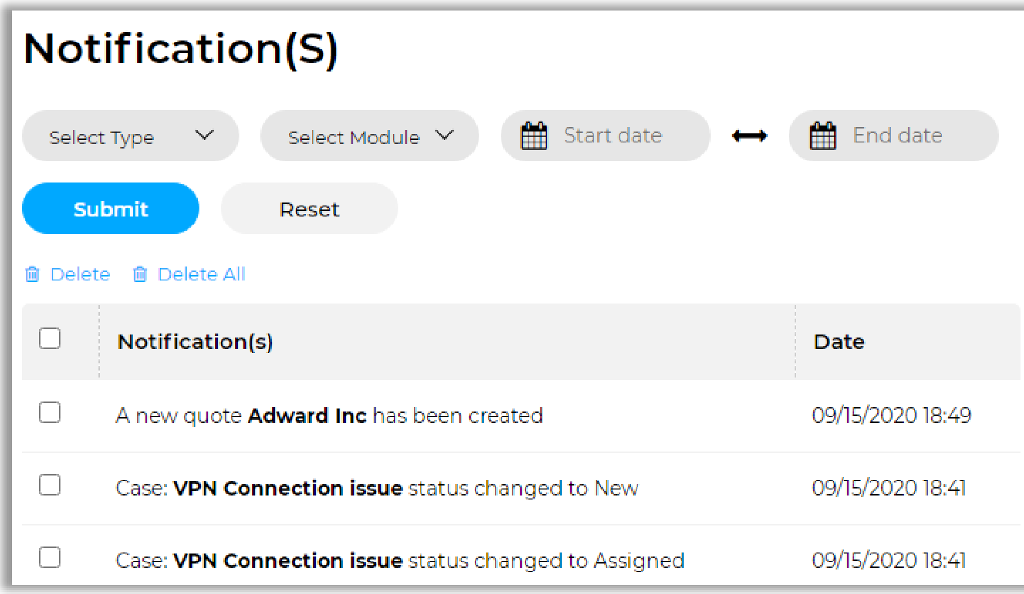


- **Create**: If you perform any actions, the customers will get the notification if they are in that User Group. *E.g.* if new meeting is created by you, the customer will get notification related to the meeting.
- **Status Change**: If Status is changed by you, they will get notification.

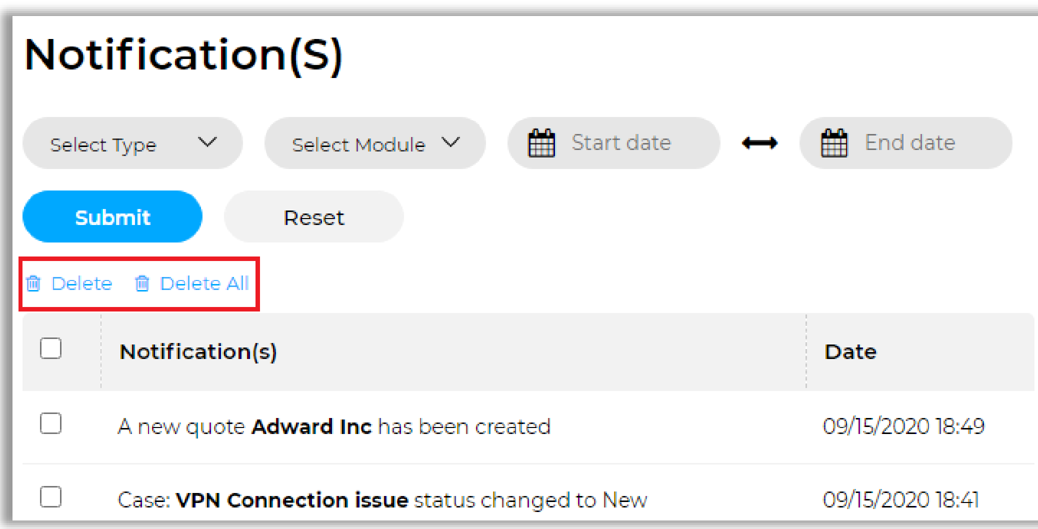
Notification



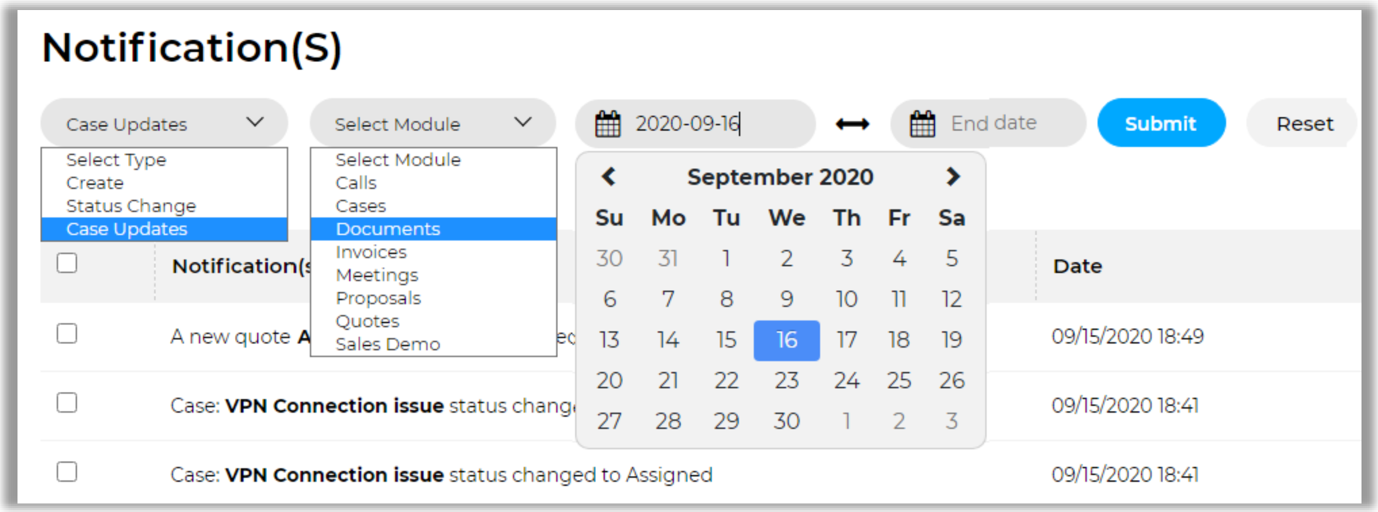
- By clicking on the **Notification** 'icon', the customers will get the notification with the highlighted details as shown above image.
- By clicking on the **View All** option, the customers can see all the notification in detail.



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



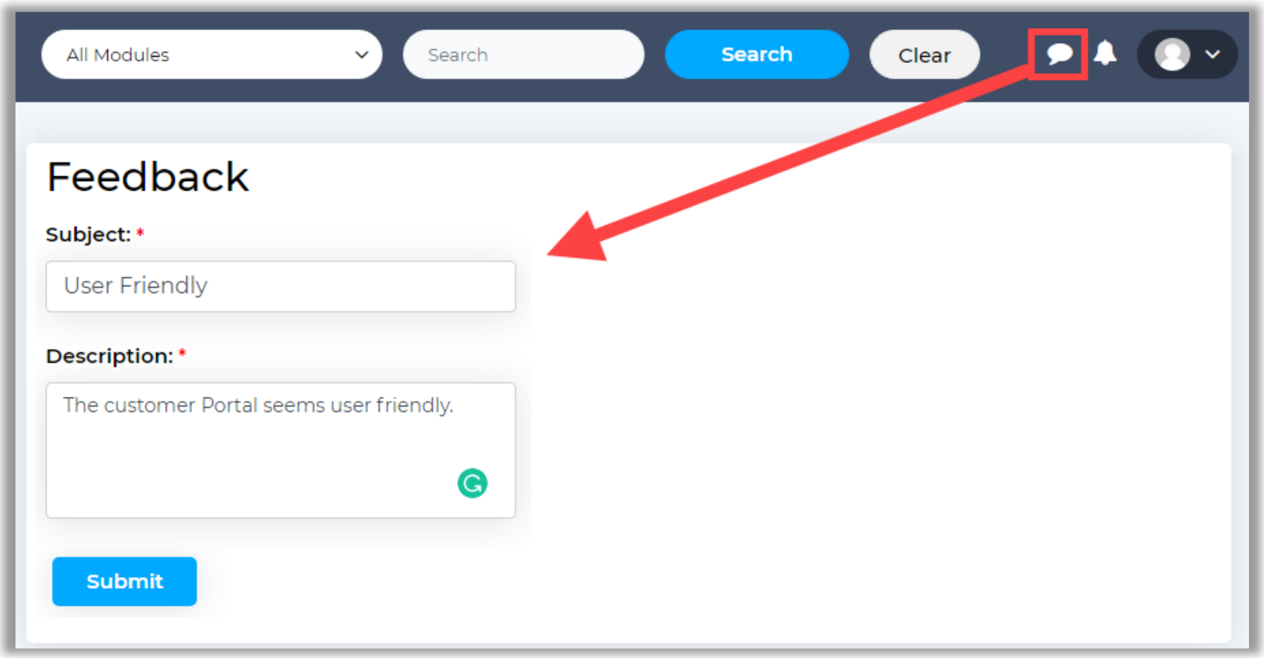
- You can also delete the unwanted notification from the list. Select notifications and click on **"Delete"** button or click on **"Delete All"** button if you want to clear the notification list.



- 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.

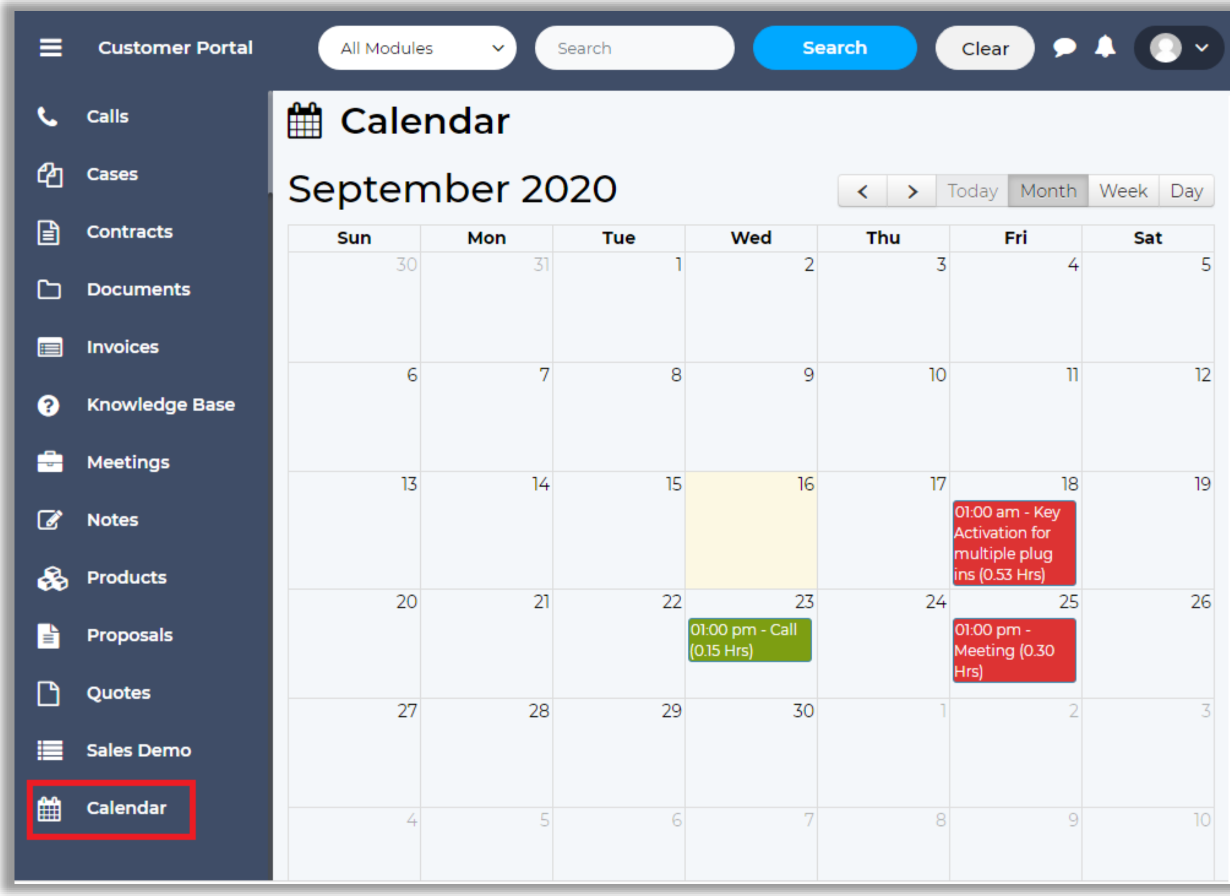


- Add subject and description for feedback and save. It will get related to this particular contact in CRM. So, in contacts you will get sub-panel of feedback where there will be a list of feedbacks added by that portal user.

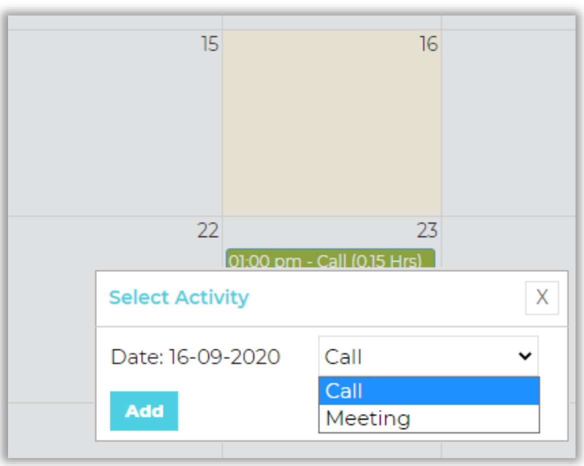
- Portal user can also add multiple feedback from portal as an when require.

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.

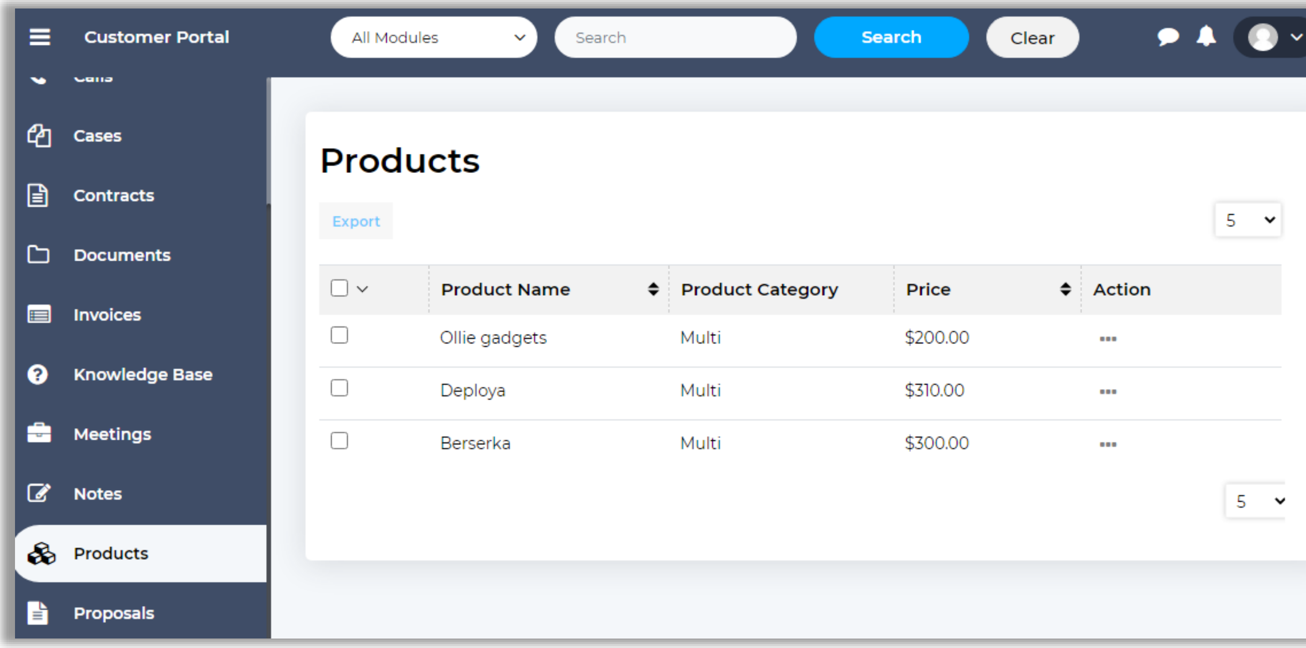


- Click on any date and schedule activity as per your requirement.

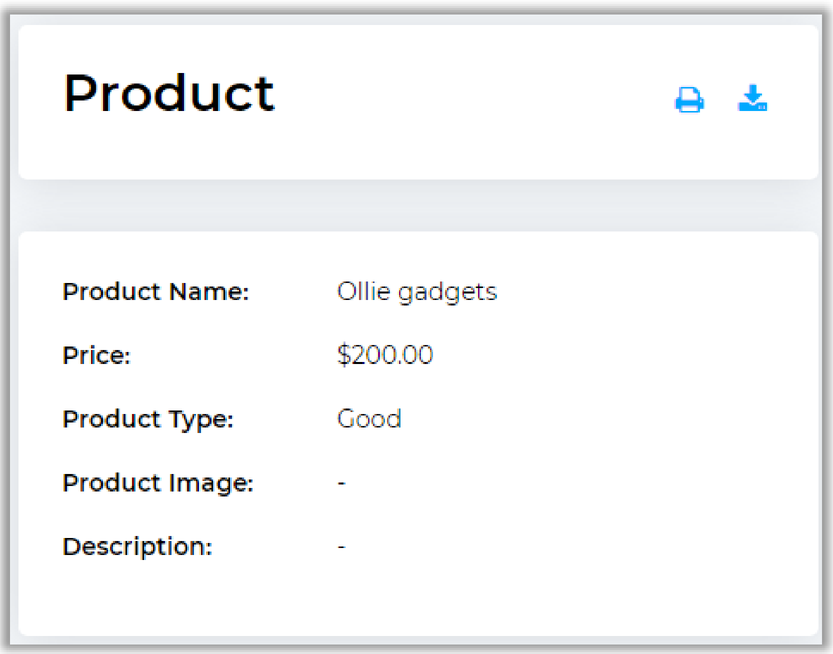


Product Page

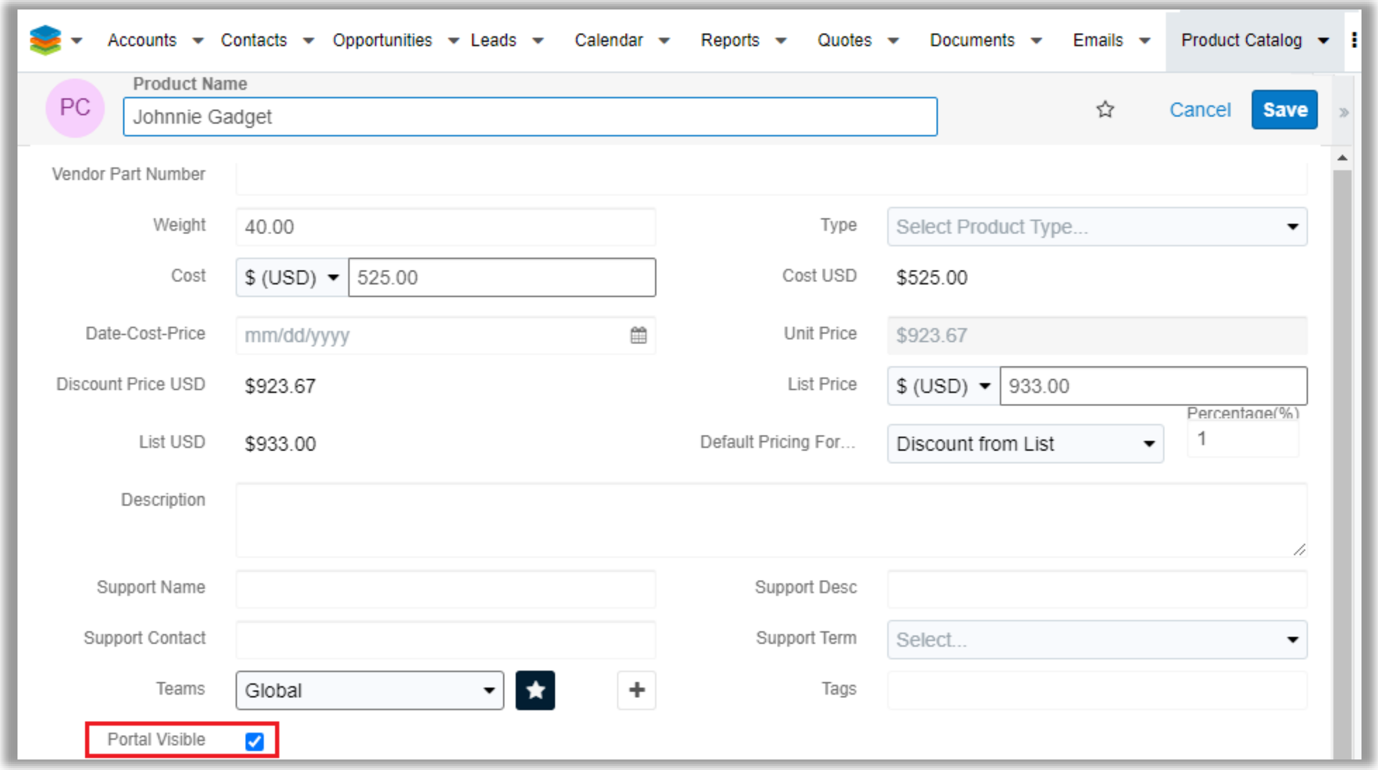
- View the list of products from product page.



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

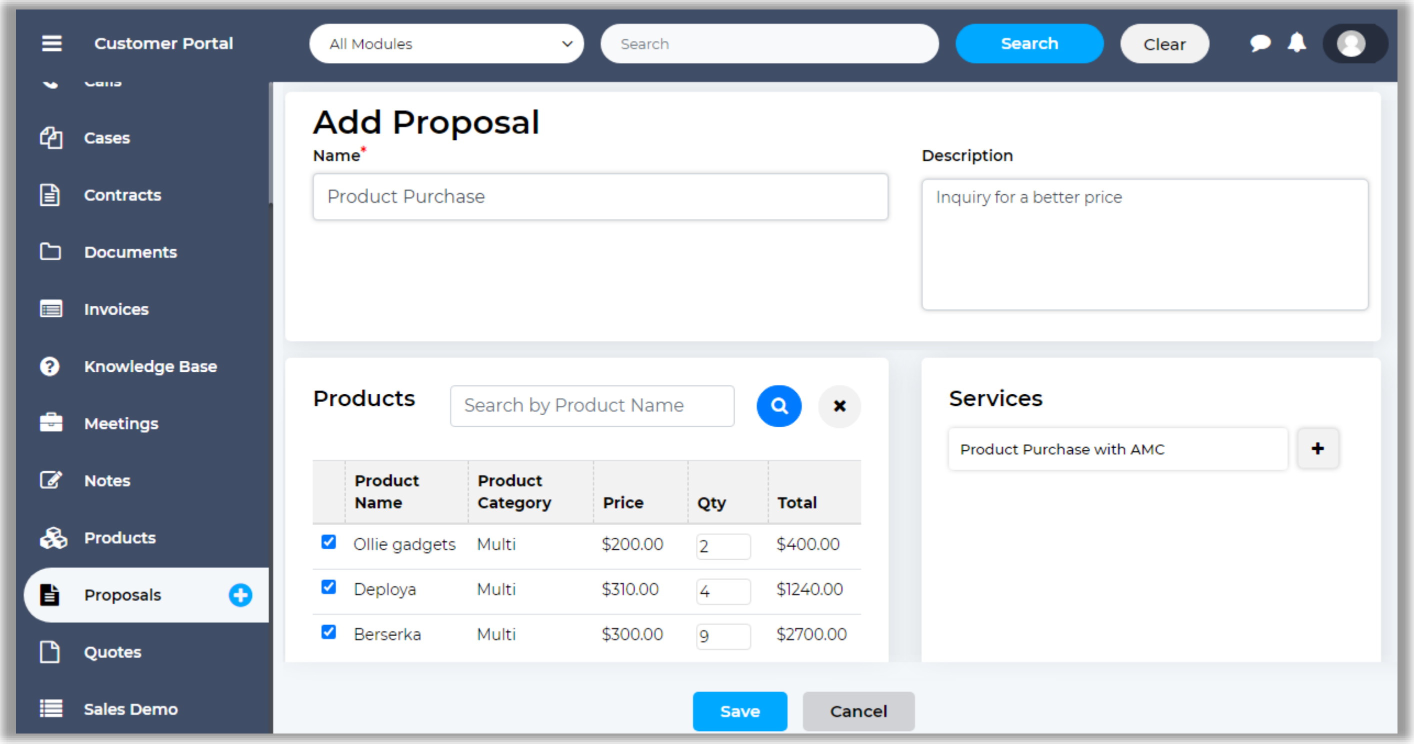


Note: Only those products will be visible in portal which are set as "portal visible" by admin from the detail view of portal.

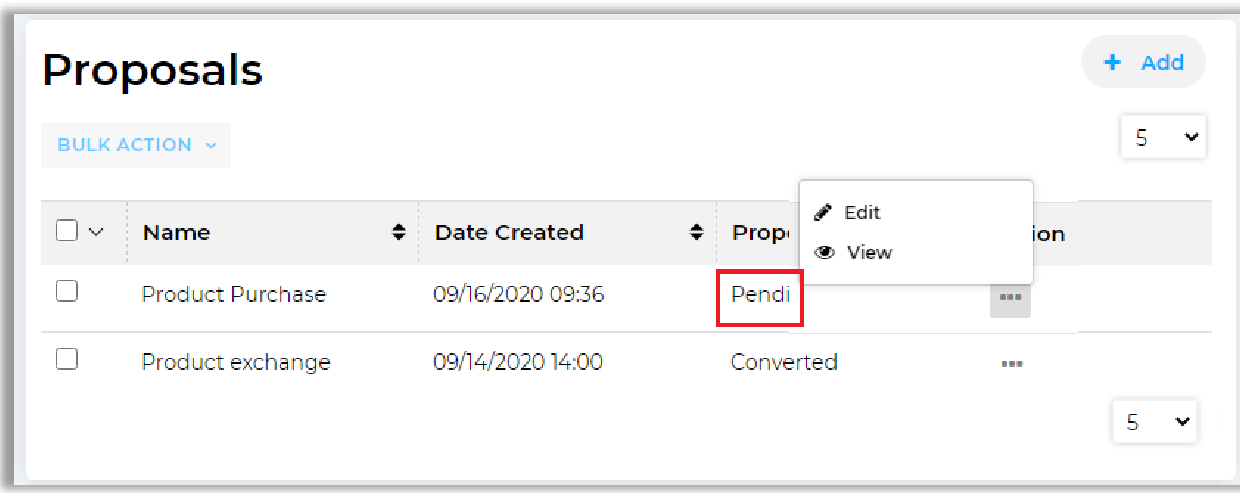


Proposals

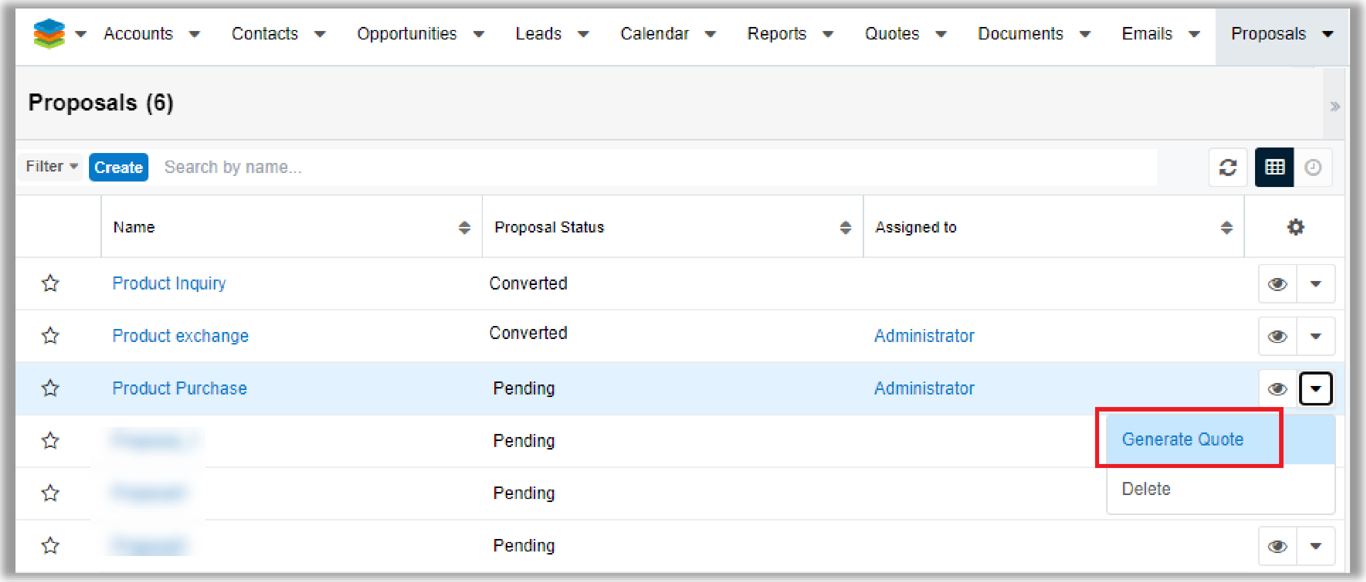
- You can create proposal with the required products and services.



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

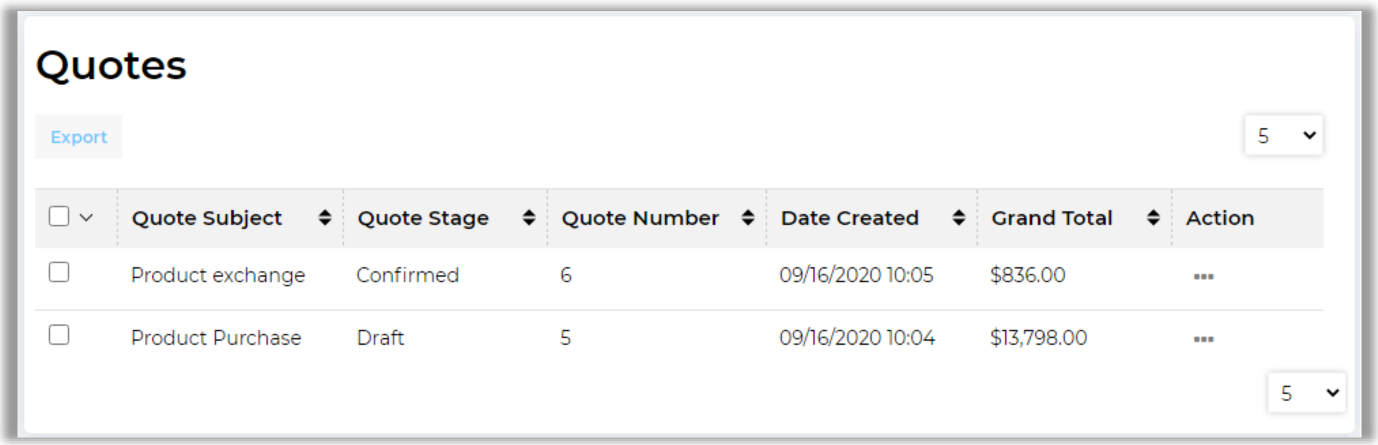


- Admin can convert the proposal to quote by **"Convert to Quotes"** option.



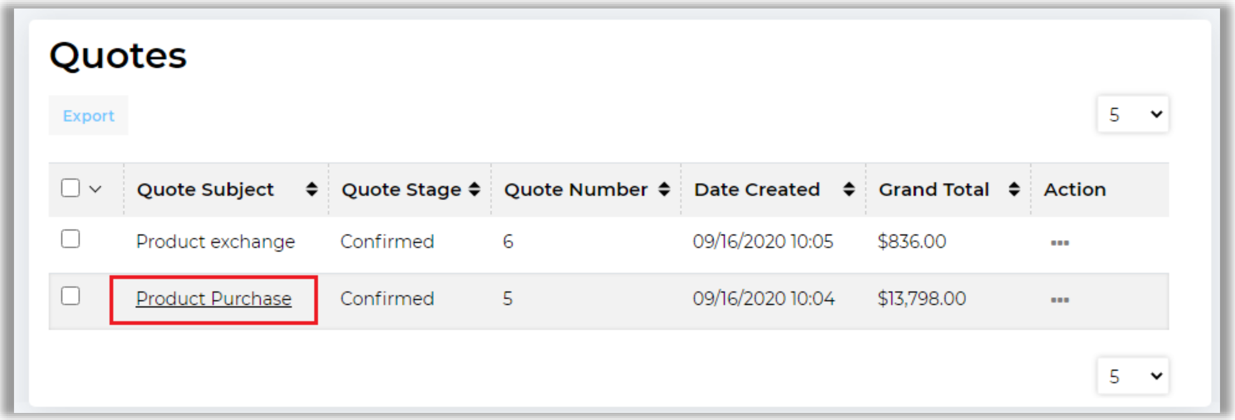
Note: Proposal cannot be changed once the proposal is converted or declined by admin.

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



View Quotes, Invoices and Contracts

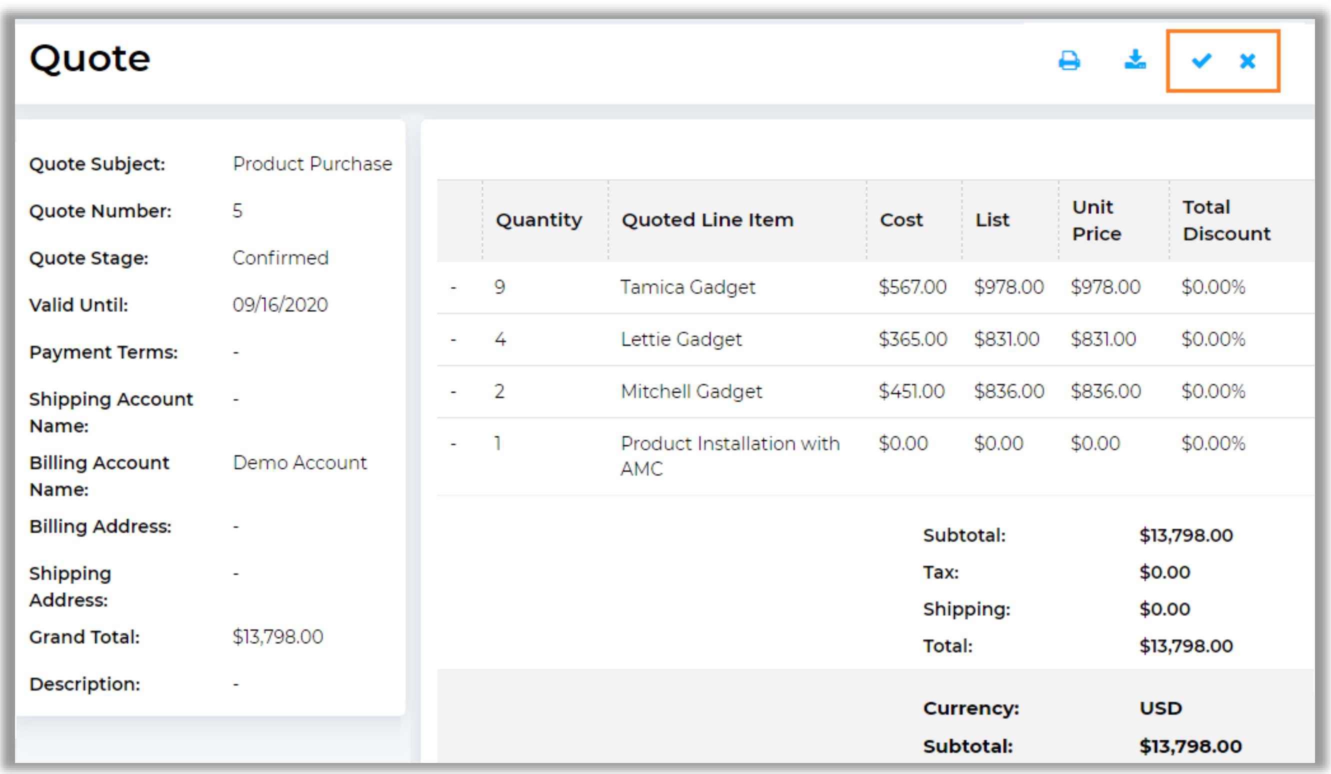
- Your customers can View or Download Quotes, Invoices and Contracts added by admin from SugarCRM side in Portal.



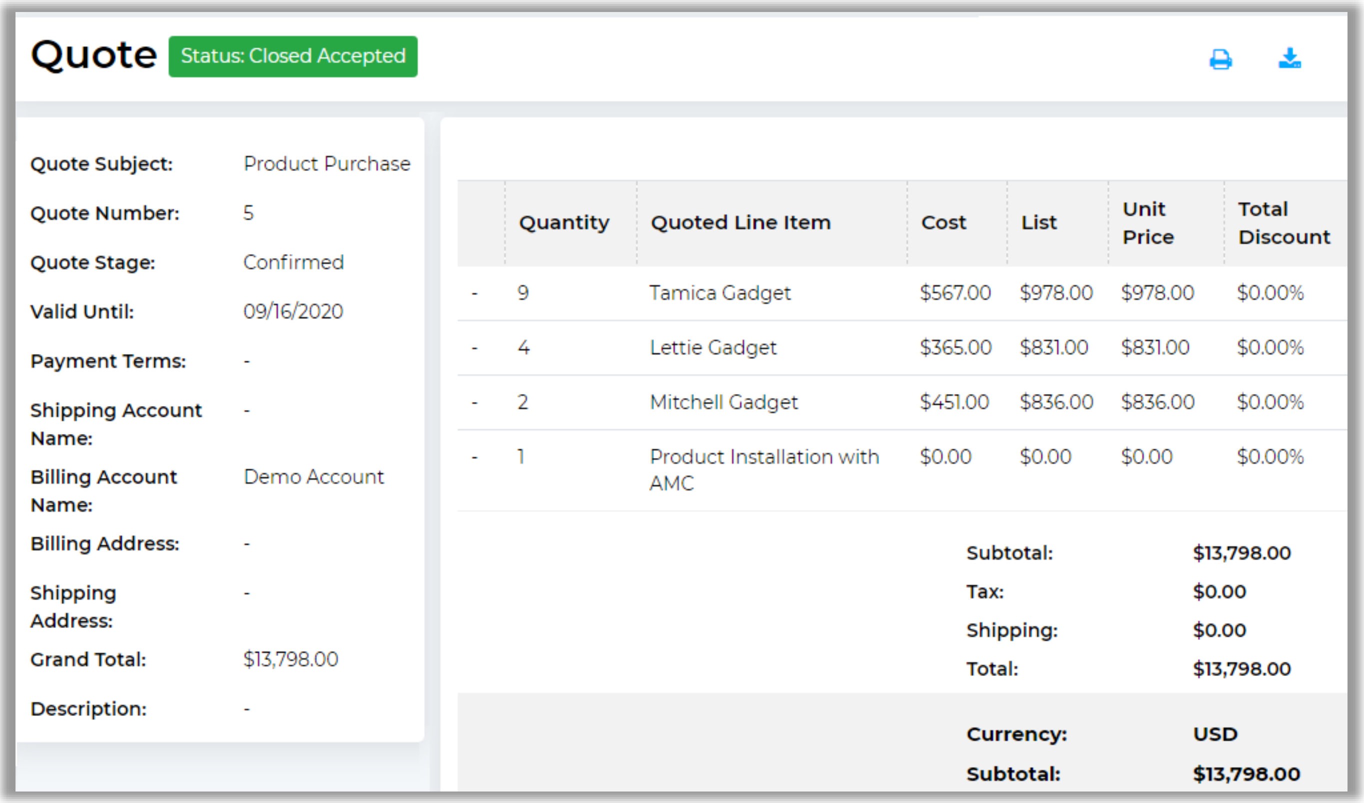
- To download the PDF version of Quotes, Invoices or Contracts click on the download icon under **'Actions'** column.

Accept or Decline Quote from Portal

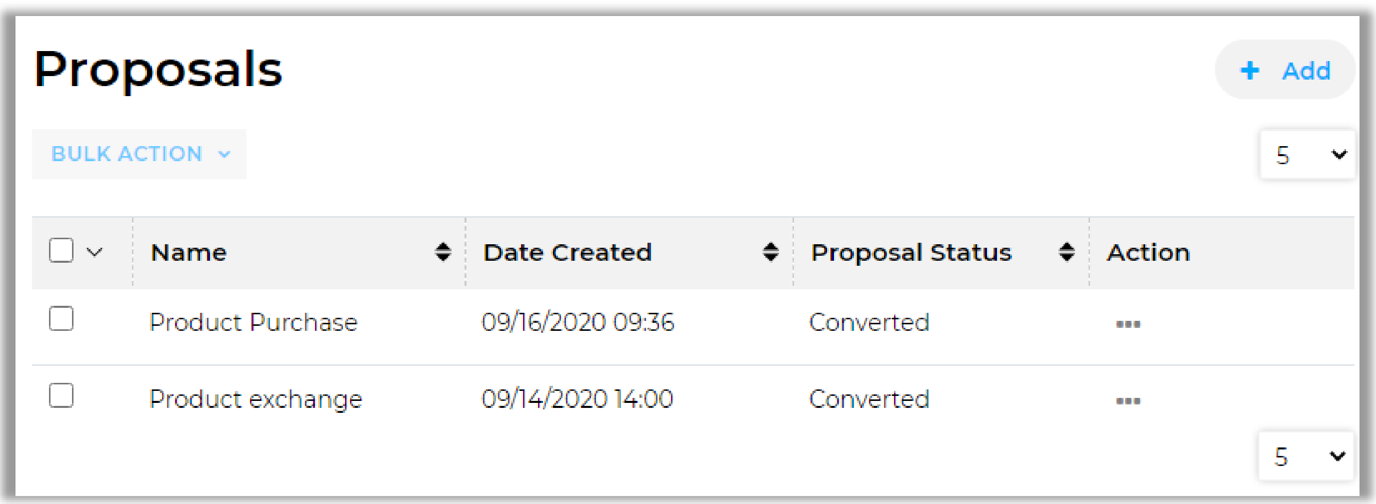
- By clicking on Quote, user can verify the details of Quote.
- A button to accept or decline the quote will appear in the detail view of a quote when it reaches **"confirmed"** stage.



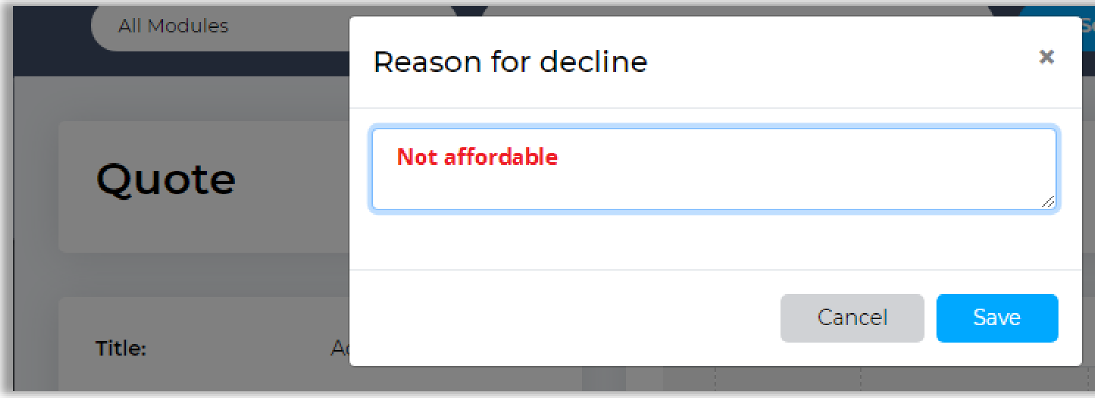
- If user ‘Accept’ the **Quote**, the status will be updated to **"Closed Accepted"**.



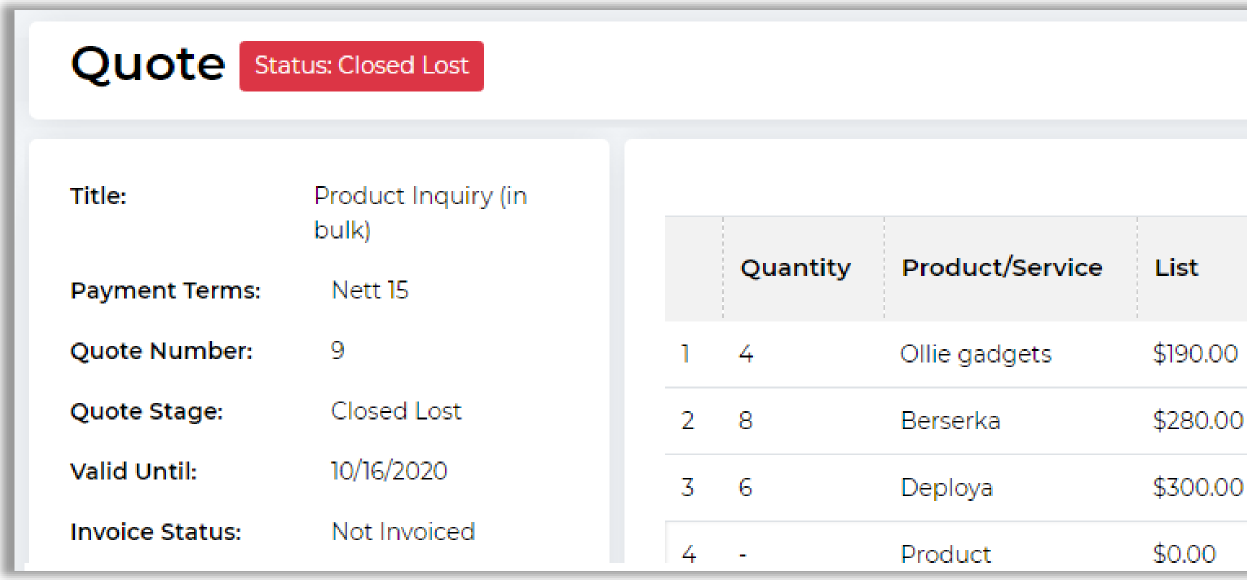
- After accepting the Quote, the ‘Proposal Status’ will also change to **Converted**.



- 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**.



- 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.

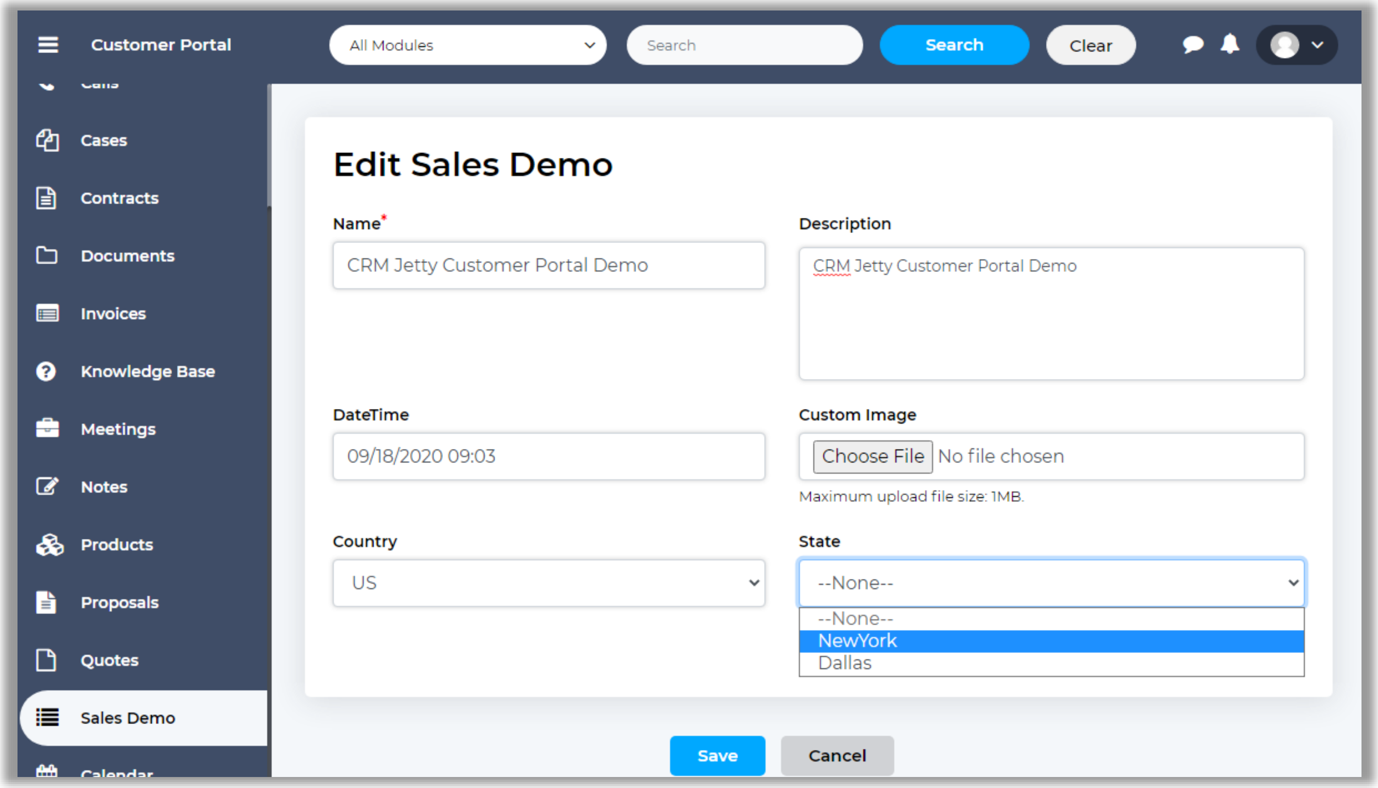
- Later, you can **edit** the "Quotation" on the basis of rejection reason and resend the same to User.

- 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

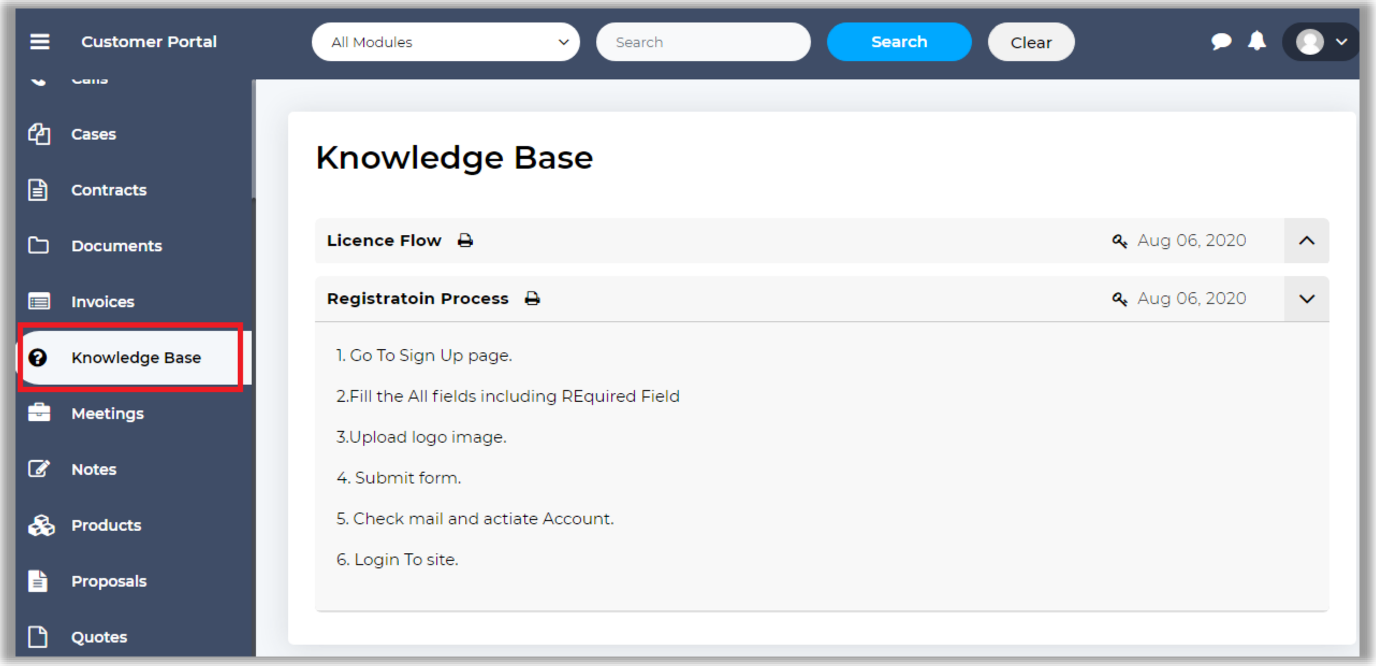
- If you have added any Custom Module and enabled as well from the CRM side for the customer portal, your customer will get the custom module and add/edit/check the records as per the accessibility rights.



- 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.

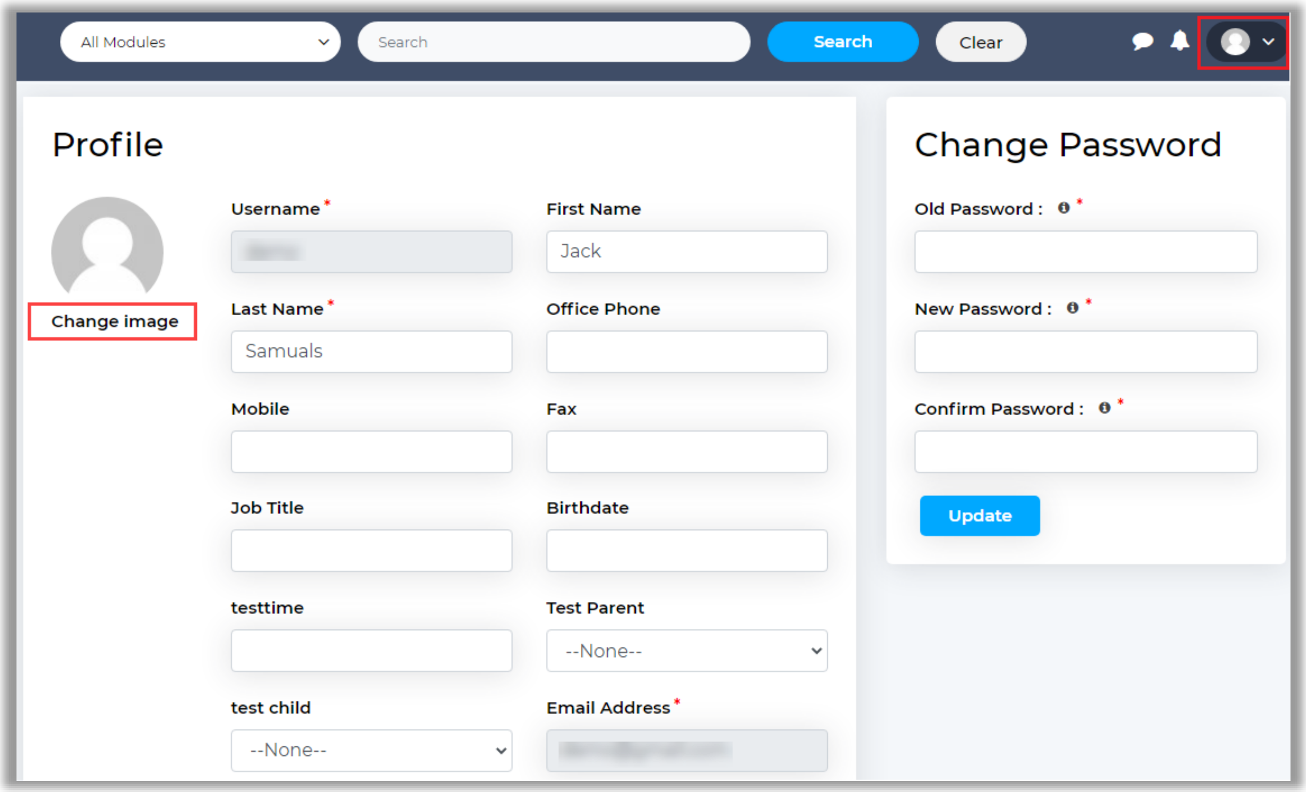


Note:

- 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.

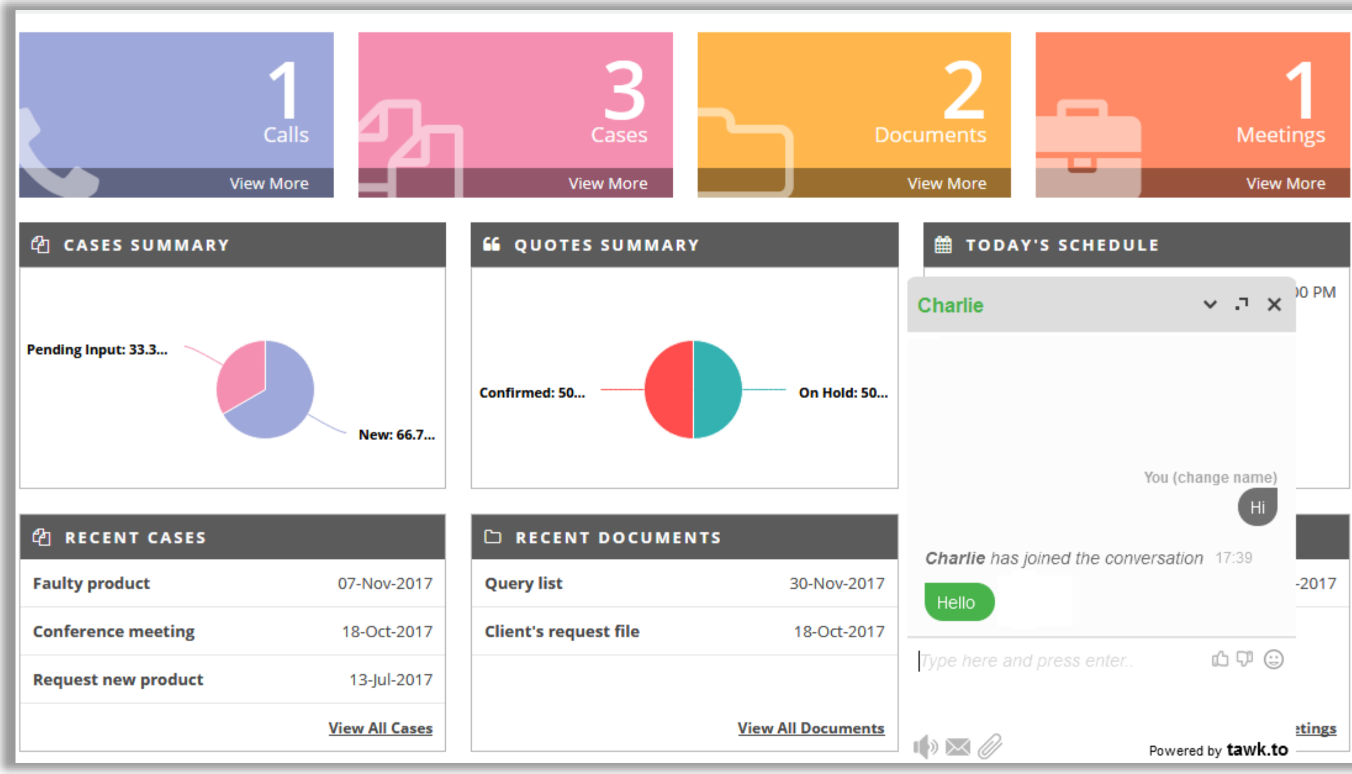
Profile

- 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.

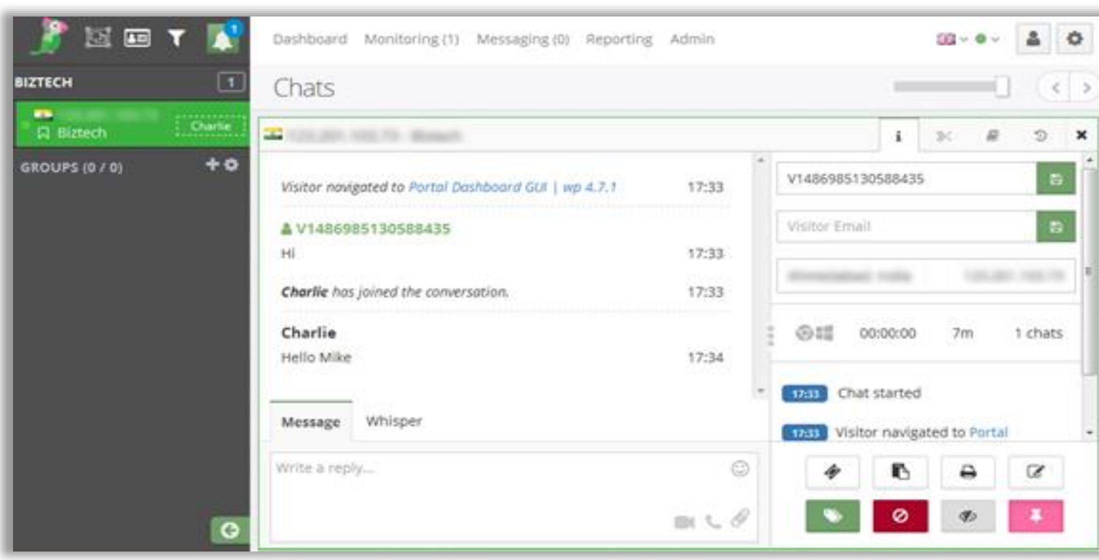


Chatting

- 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