USER MANUAL

SuiteCRM Customer Portal for WordPress

Version: 3.2.0

WordPress Compatibility

WordPress: 4.0 to 5.1.1

SuiteCRM Compatibility

SuiteCRM: 7.4. * to 7.11

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Introduction

This SuiteCRM Customer Portal plugin will help your customers to use several SuiteCRM modules in their WP interface, which you can define from CRM. The plugin integrates Accounts, Contacts, Calls, Meetings, Notes, Cases, Documents and Quotes module of SuiteCRM 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 a proud user of SuiteCRM, you can manage your WordPress customers better by integrating SuiteCRM and WordPress platforms and connecting your WP users with your SuiteCRM system. The SuiteCRM Customer Portal will provide you the following benefits:

- Single sign-in for WordPress user account and portal
- Interactive Dashboard with recent records
- 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 SuiteCRM
- Case commenting option
- Tawk.to - A Chat Plugin Integration. Capture chat conversations in SuiteCRM
- Calendar view for all scheduled activities.
- Accept or Decline Quotes from Portal
- Download Quotes from Portal in PDF format.
- Global search across all module.
- Get Latest updates through notifications.
- Download Quotes, Invoices and Contracts from Portal in PDF format.
- Access of knowledge Base without Login.
- Generate proposal from product catalogue and convert to quote.

Prerequisites

Follow the points given below before starting installation:

- You should login as an Administrator in SuiteCRM.
- Check that your SuiteCRM Instance is compatible for Customer Portal.
- You must have a valid License Key Provided by CRMJetty.
- If you are installing Customer Portal, make sure there isn't any older version of Customer Portal Plug-in already installed on SuiteCRM. If there is any, you should have to uninstall that plug-in first.
- Check your WordPress portal has compatibility with Customer Portal.
- You should be able to login as an admin in your WordPress portal site.

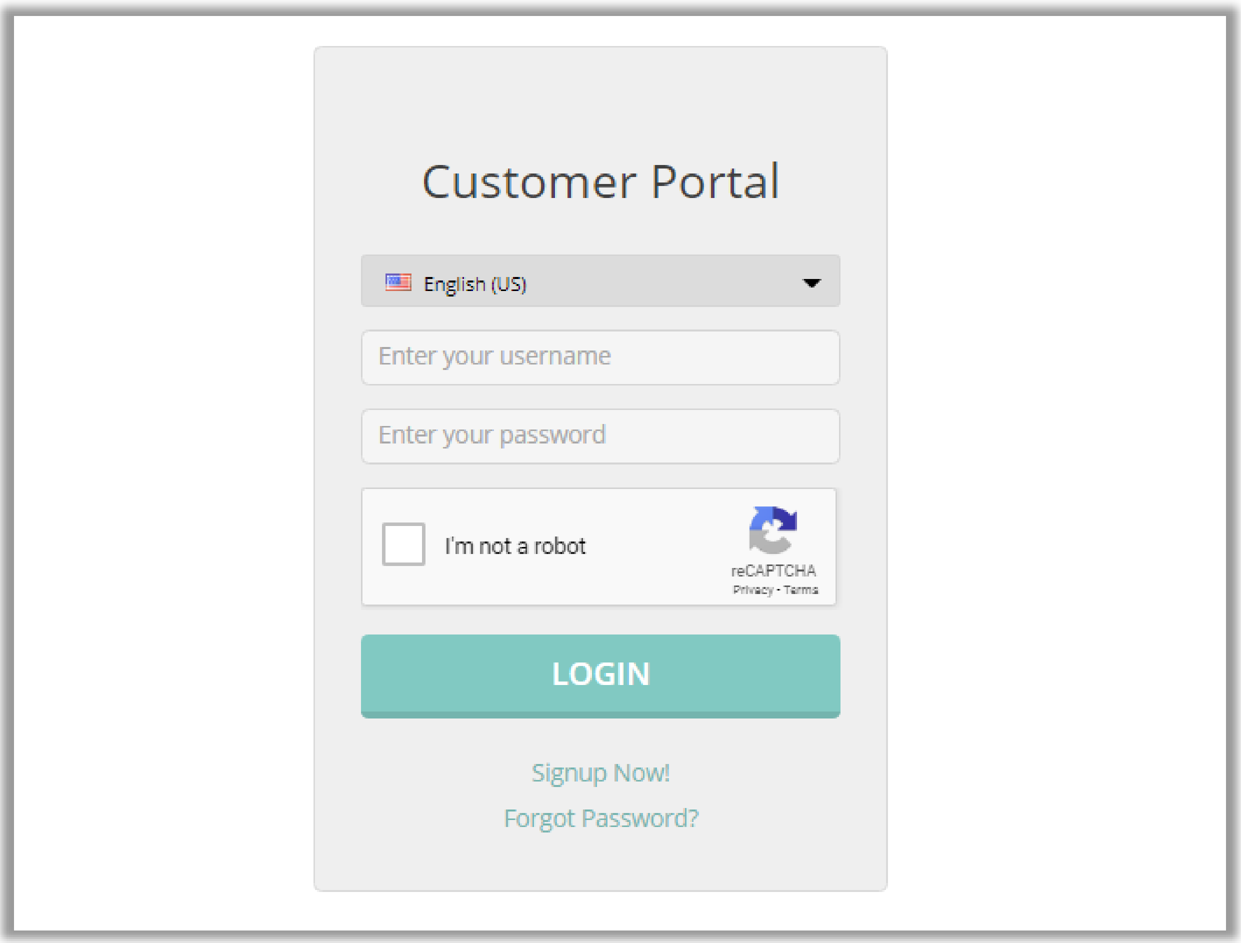
- Make sure that CRM Customer Portal Plugins related files have proper file permissions. As per the SuiteCRM Install and upgrade guideline, we advise you to give 755 recursive file permissions to custom and modules directory of your CRM instance.

Manual

After completing all configurations at SuiteCRM and WordPress portal for Customer Portal plugin, Customer can sign-up or login to Customer Portal and access SuiteCRM modules as the assigned Portal user group.

Login:

- Directly login to the portal using your portal credentials.



Sign Up:

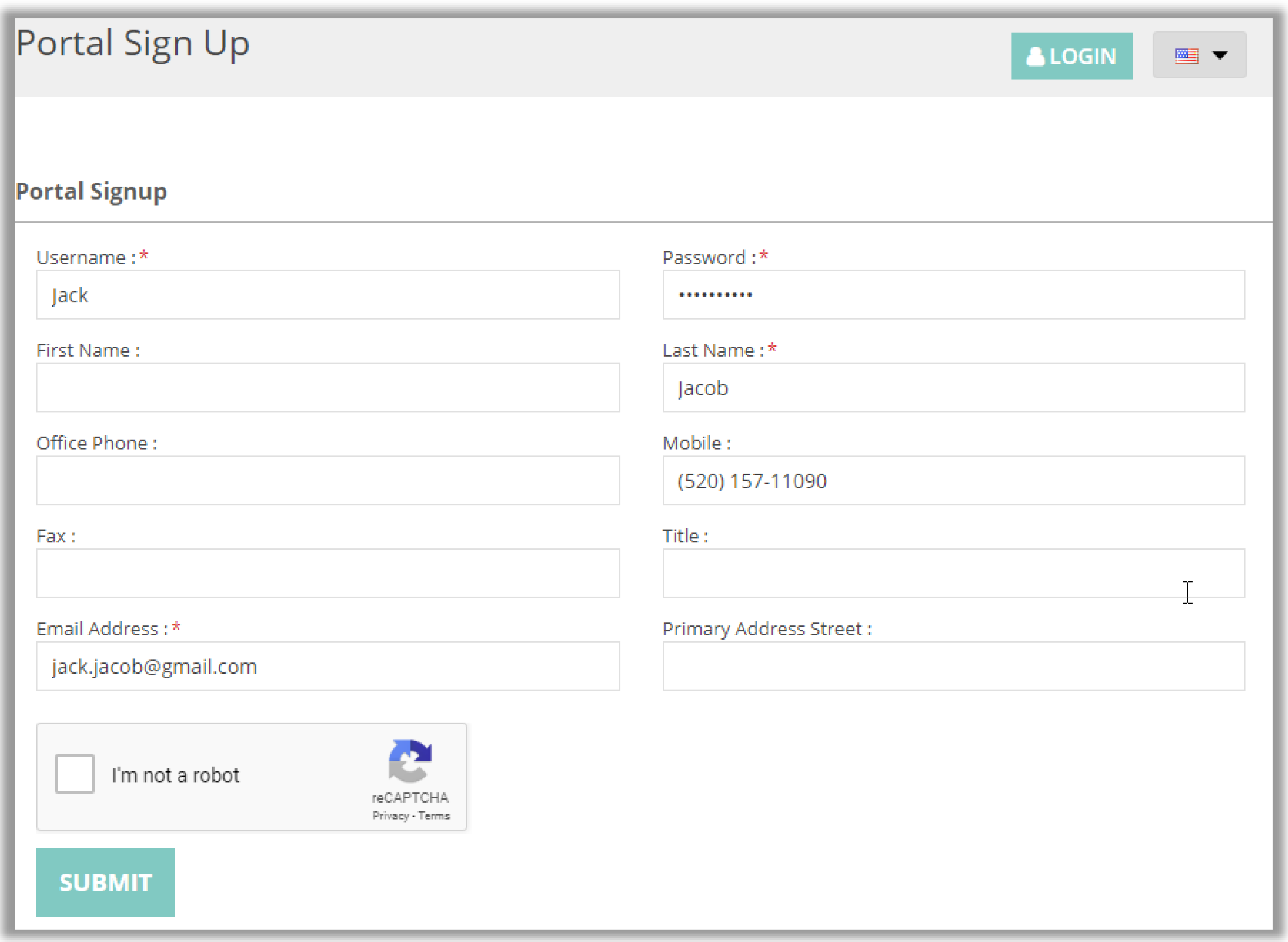
- Customer can sign-up to the WordPress Portal by clicking on **‘Sign Up Now!**’ link on the Login Page. On clicking this link will redirect customer to sign up page as below.

- A new user can directly sign-up from the Portal. The credentials will be verified to check whether any customer has been registered with same username and email address. If any such user does not exist in the system, then a user will be created in WordPress and SuiteCRM Contacts module.

- As soon as the portal user is created, a verification link will be sent to user on registered email address. If user have not verified the link, they will not be able to login from portal.

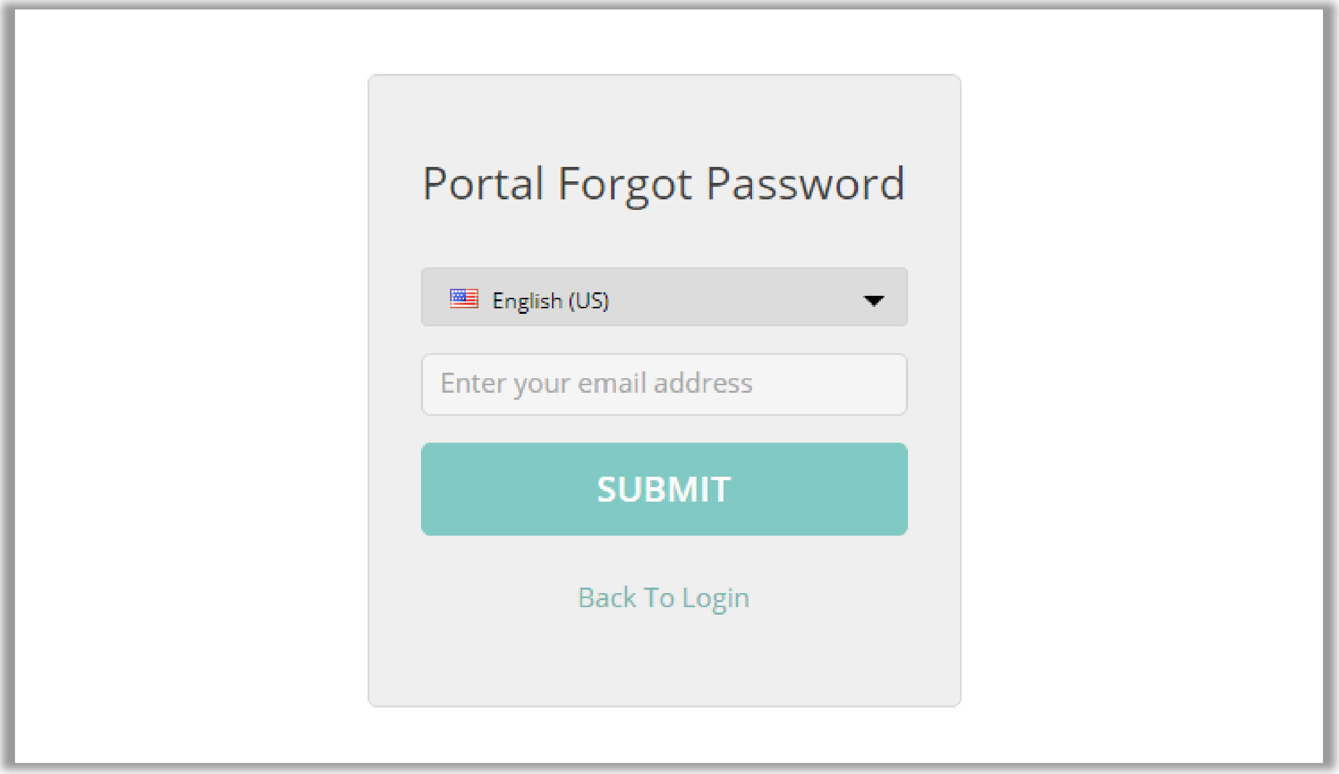
- Once signed-up from the Portal and have done email verification, User can directly login to the Portal and can also access his WordPress Account without having to login again.

- **Note:** Already existing customers on both sides (WordPress and Suite) won’t get the access for Customer Portal automatically on installation.



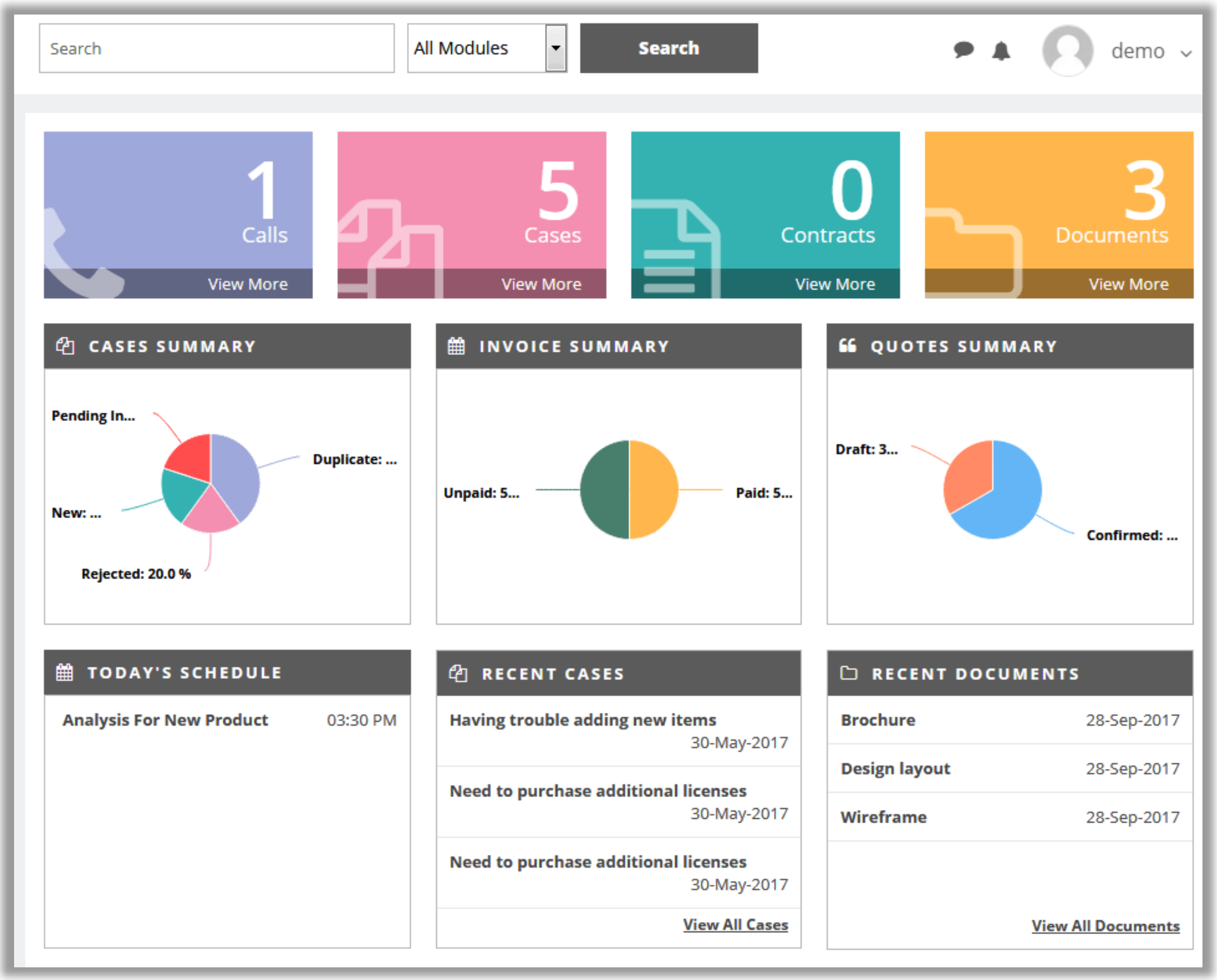
Forgot Password:

- Portal user can retrieve their 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.



Portal Dashboard:

- Quickly access top modules by clicking "**View More**". 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.



- It will also display charts for cases and quotes module to view their status.

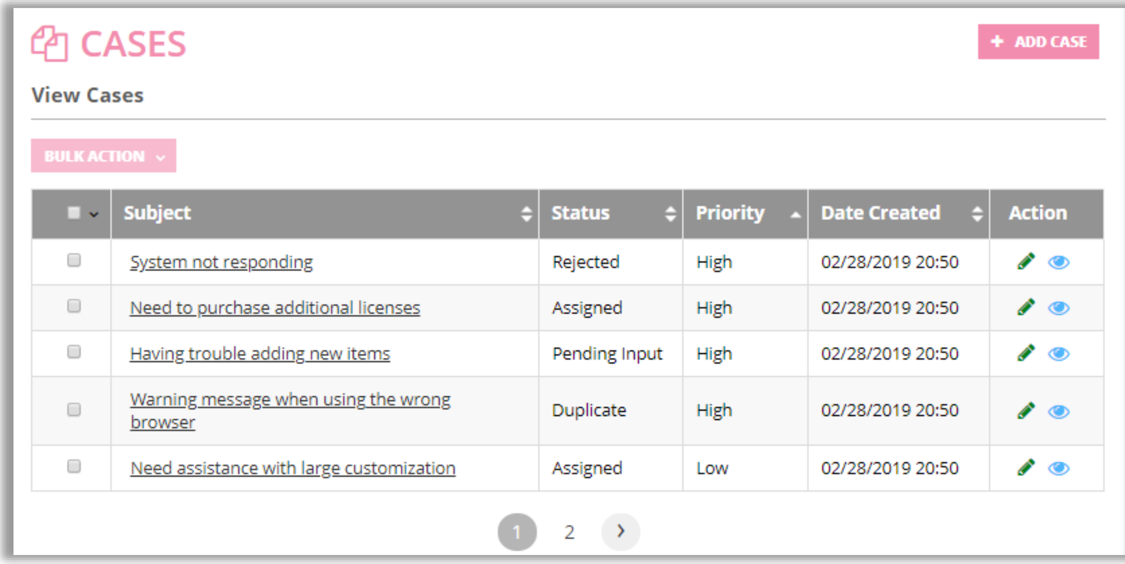
- You can also search globally from the portal or can select module from drop down to search from any specific module.

- Dashboard includes recent activities and today's schedule for viewing your whole day schedule.

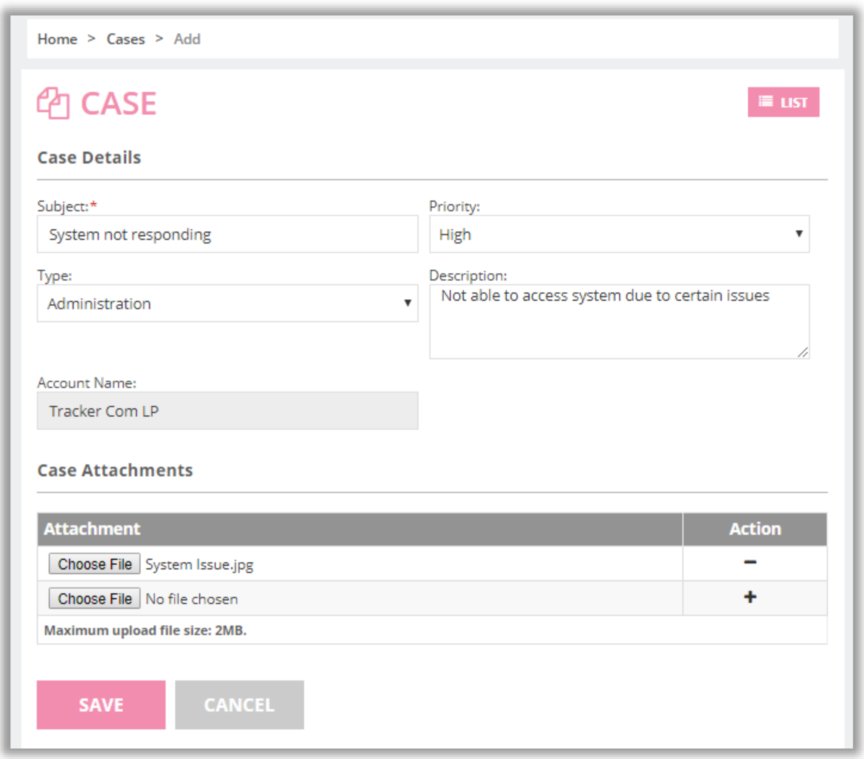
List View:

- 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 as a csv or update it.

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



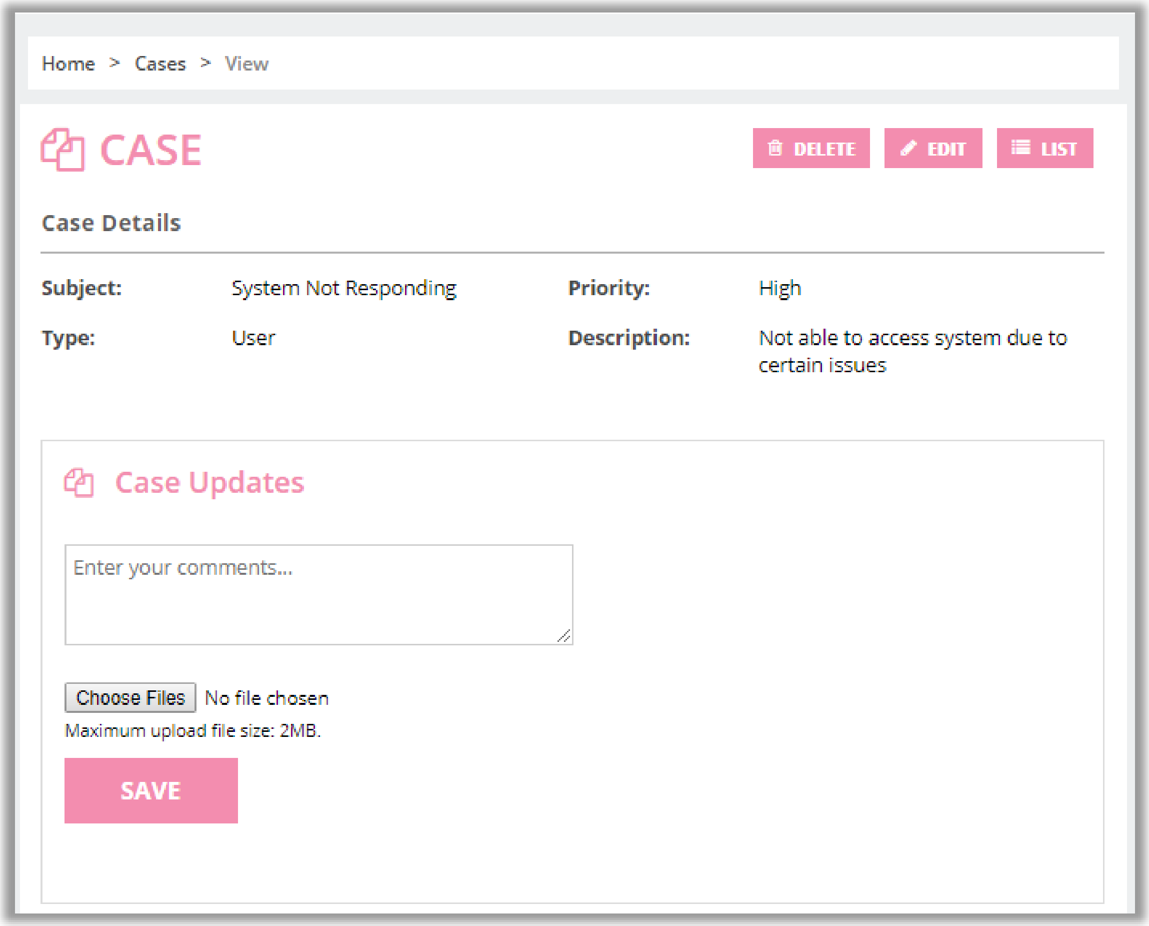
Add Record:



- 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:

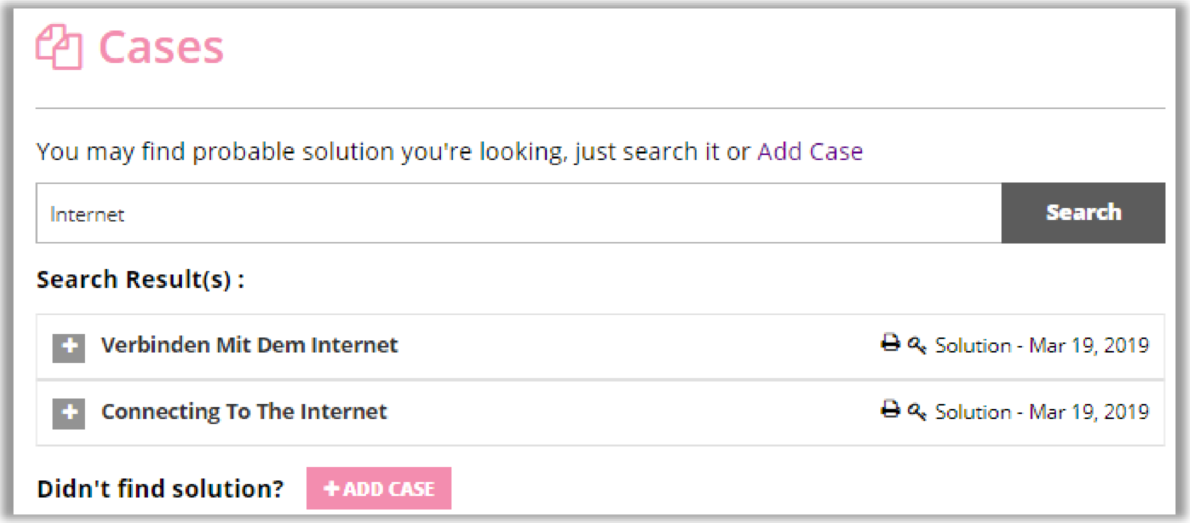
- Click on the **'View'** button from the List View and view the details of a record. You can edit that record or delete it from the detail view.



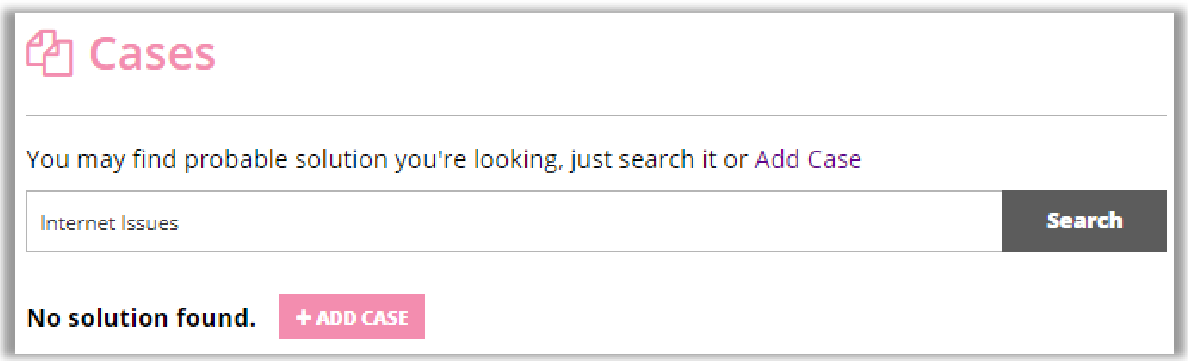
- Portal user can also print details from details view for specific modules like Documents, Attachments, Notes, Quotes, Invoices and KB articles.

Case Deflection:

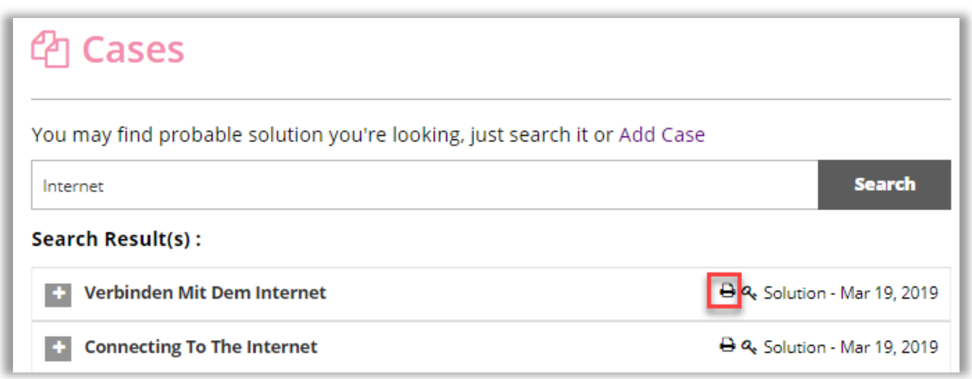
- This feature in portal will help portal user to get probable solution before generating any case.
- When portal user faces any queries or issues, they will be able navigate to add case option.



- 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 user's queries or issues or they didn't find what they were looking for, then they can add case by clicking on "Add Case" button.

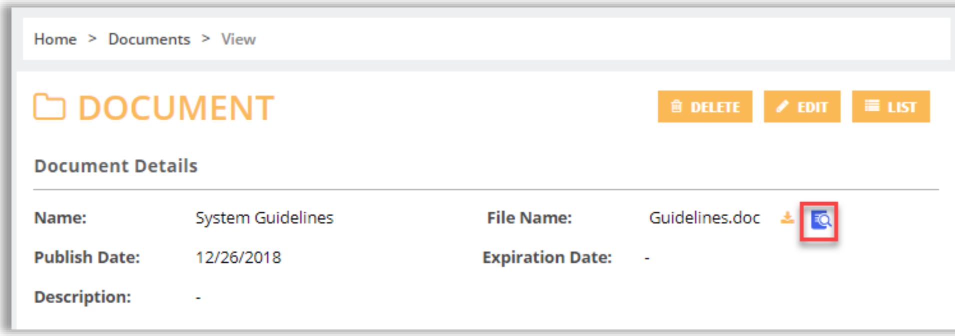


- You can also print those solutions by clicking on print icon.

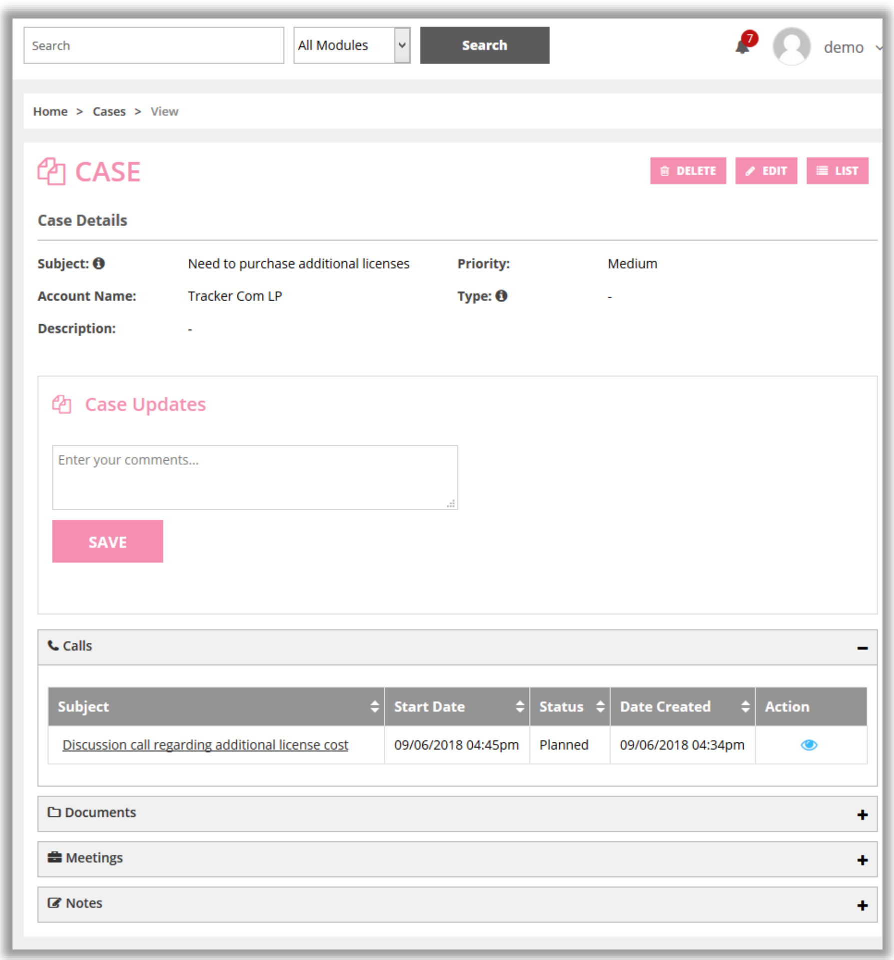
Attachment Preview:

- 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:



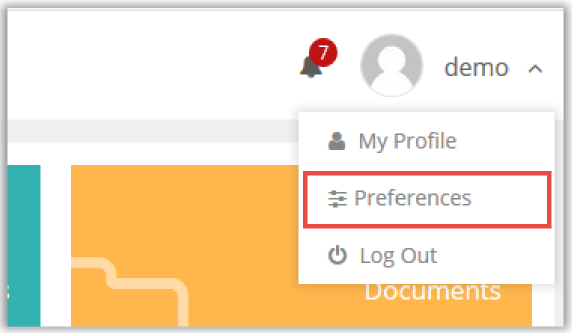
- Click on the **'View'** button from the List View and navigate to details of a record. You will find sub-panel related to that record in detail view.

- You can also add record from sub-panel view or navigate to detail view of that listed record.

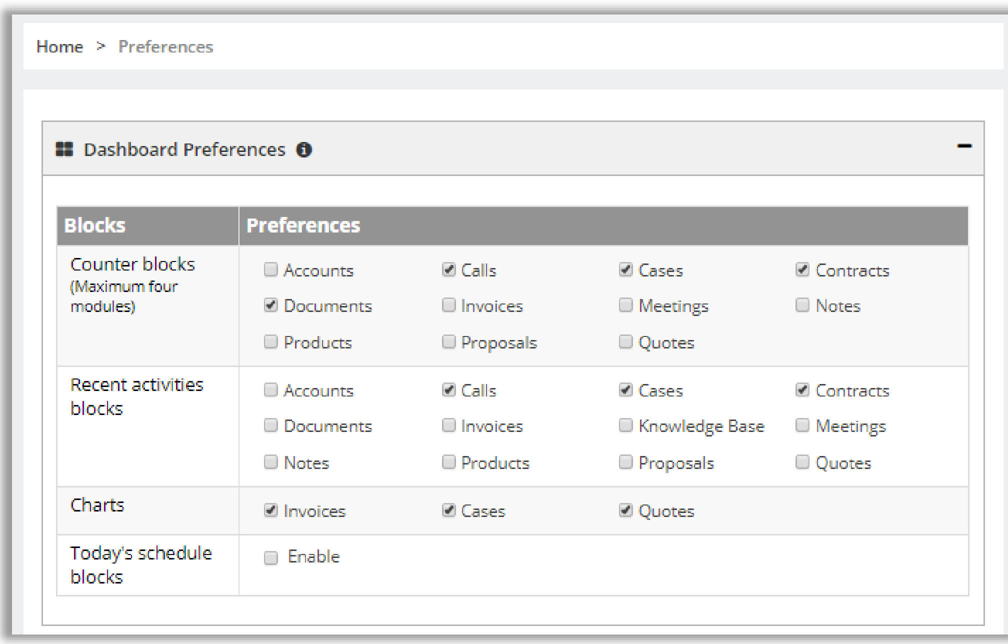
Note: Only those calls and meeting will be visible in sub panel which are made portal visible from CRM.

Dashboard Preferences:

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



- To set preferences, Click on **"preferences"** option from the profile drop-down menu.



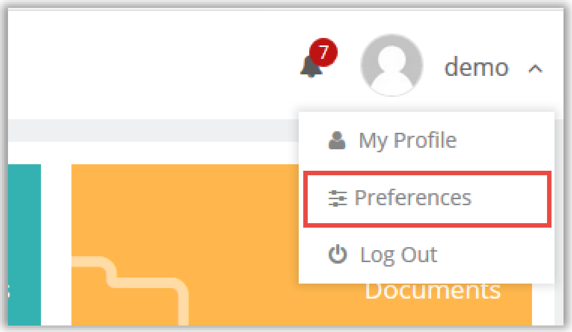
- You can enable/disable preferences for dashboard as per your requirement.

- Once you set the preferences, click on "Save" button to save dashboard preference.

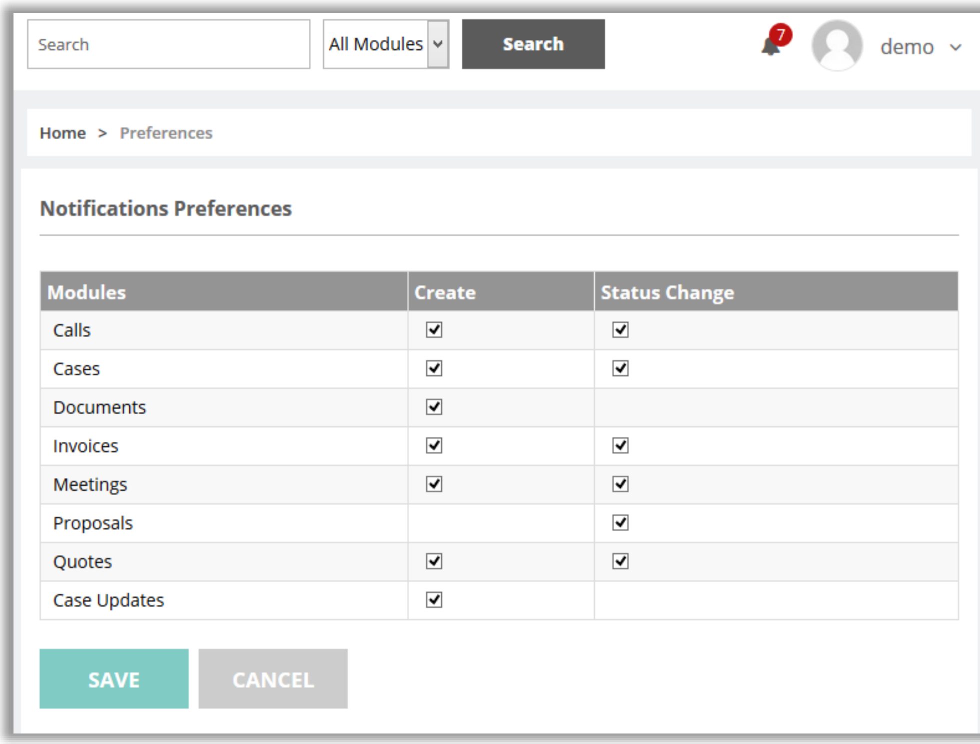
Note: By default, preference set by admin will be visible.

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.



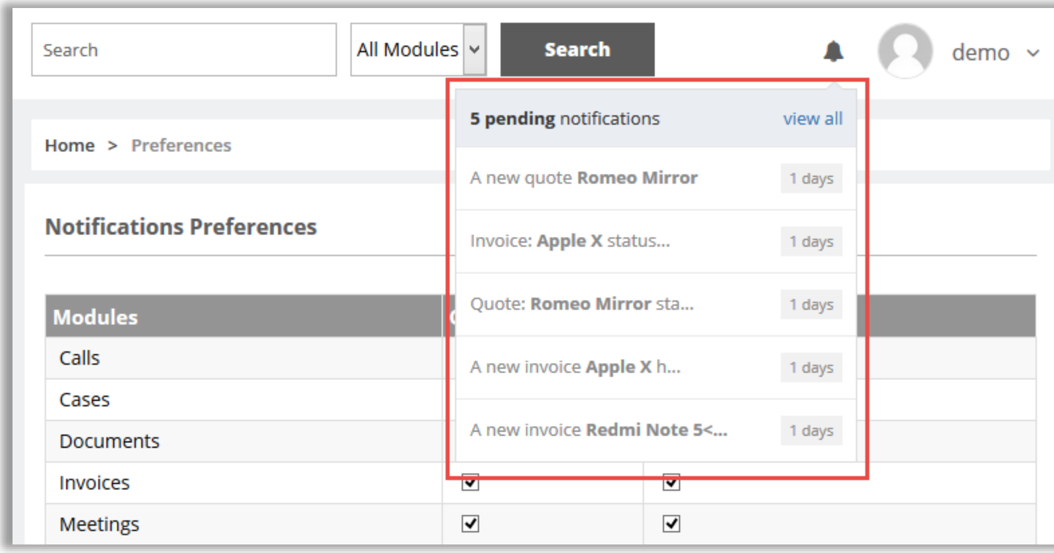
- You can enable/disable preferences for creation of any record and on status change of record.

- Once you set the preferences click on "Save" button to save notification preference.

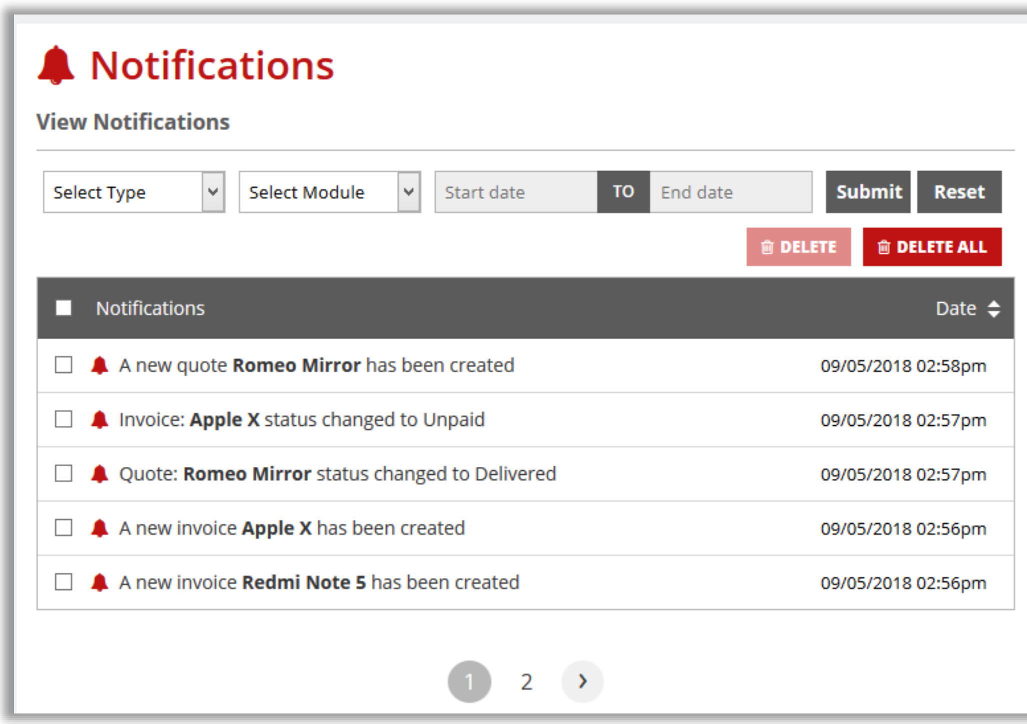
Note: By default, all the preferences will be set as enabled.

Notifications:

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

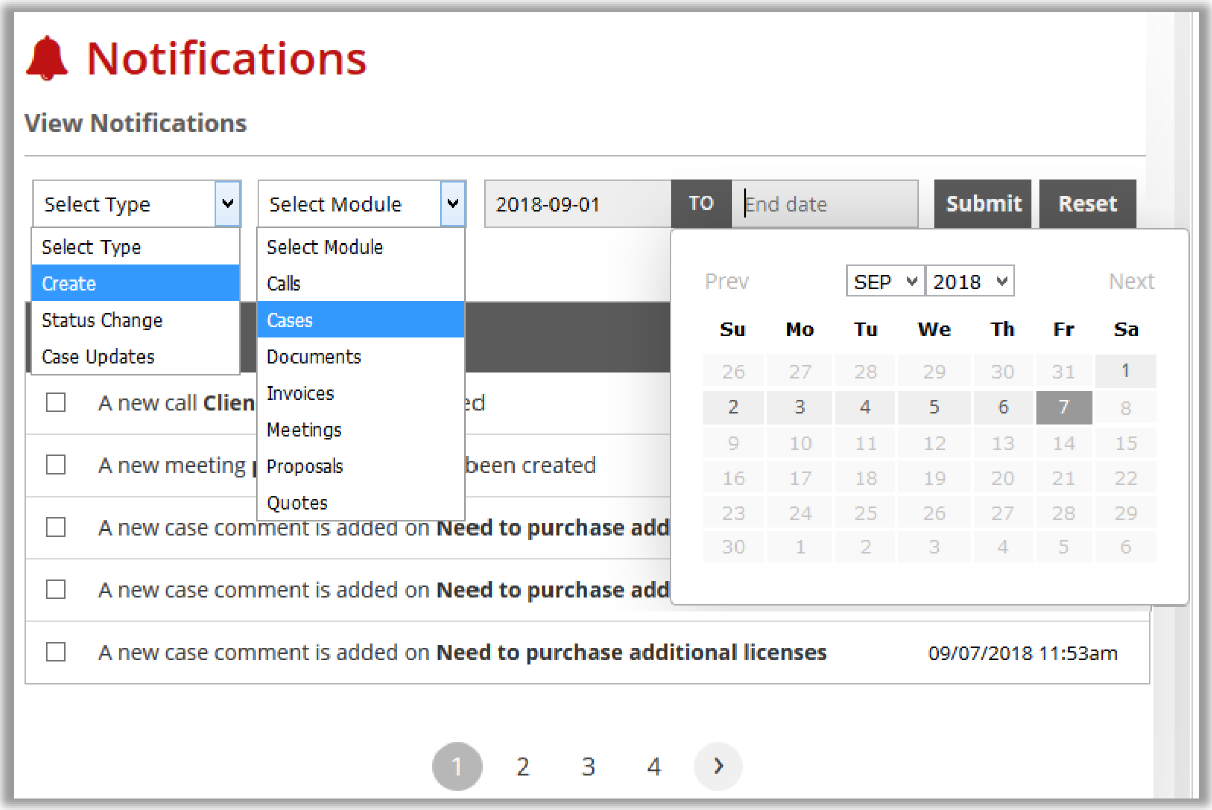


- For viewing the updates, you need to click on notification icon. It will list the latest five notifications.



- 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.

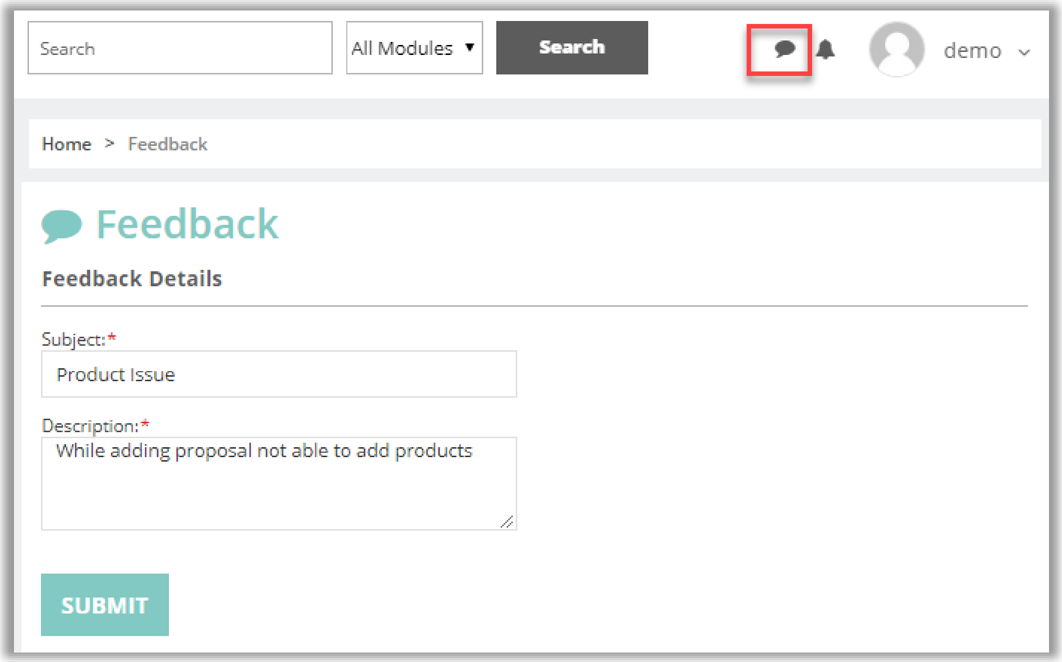
- You can also delete the unwanted notification from the list. Select notifications and click on **"Delete"** button or click on **"Delete All"** button if you want to clear the notification list.



- 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.

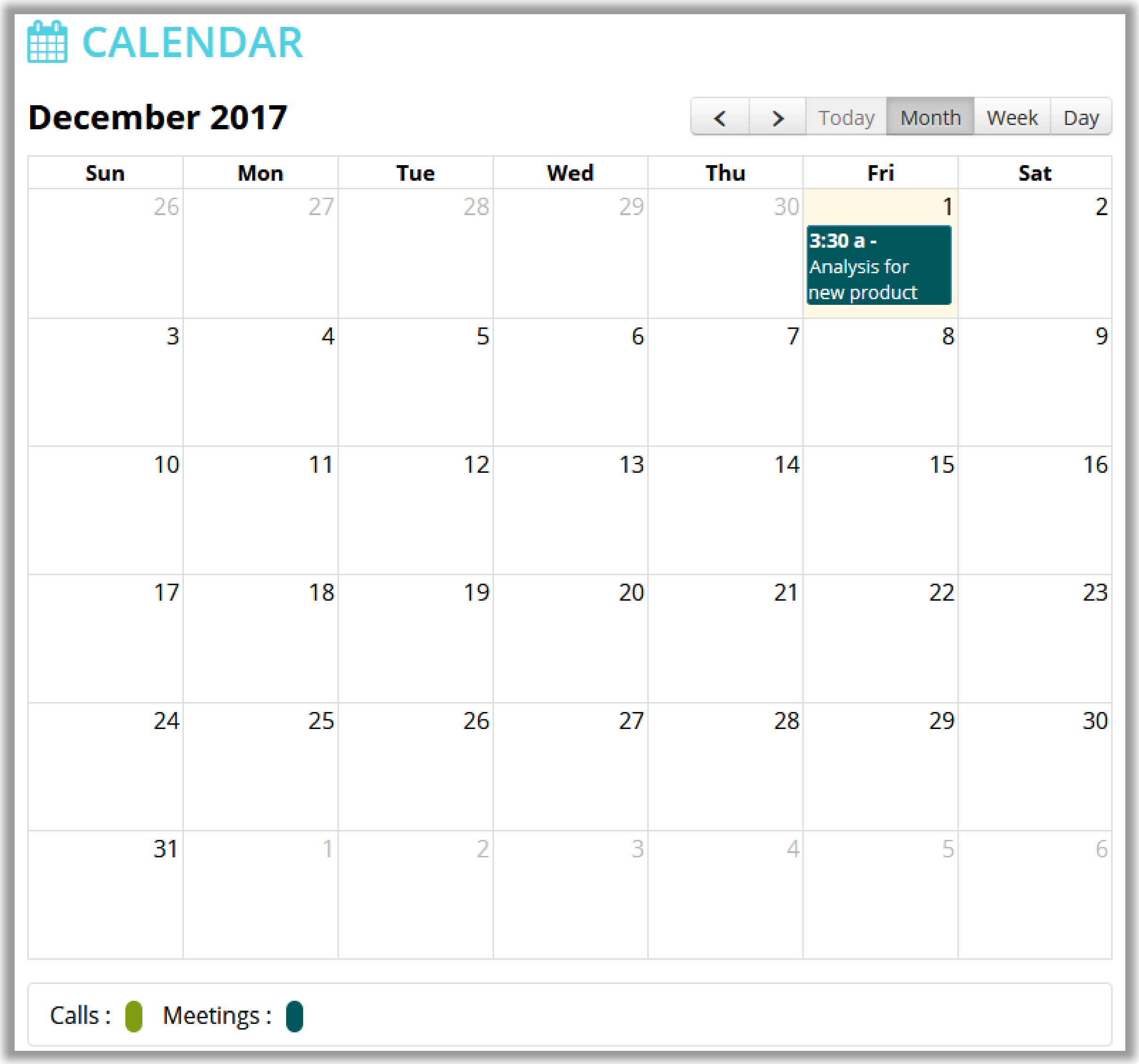


- The user will have to add a subject and description for feedback and then click on submit button to save. It will get related to this particular contact in CRM. So, in contacts you will get sub-panel of feedback where there will be a list of feedbacks added by that portal user.

- Portal user can also add multiple feedbacks from portal as and when require.

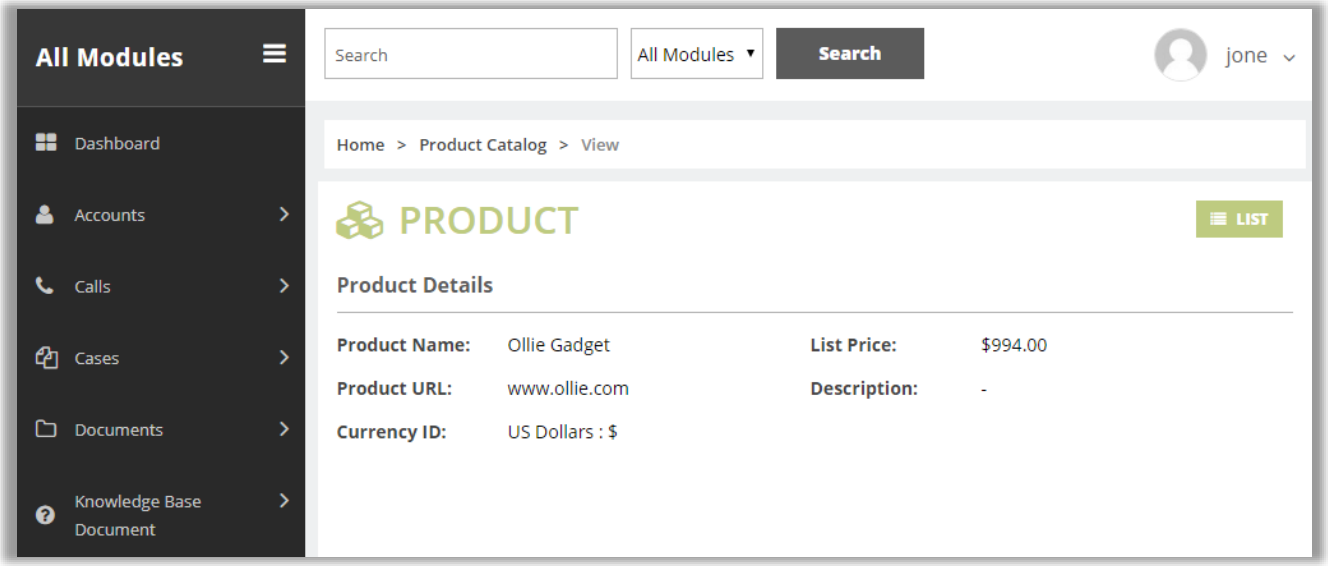
Calendar Page:

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

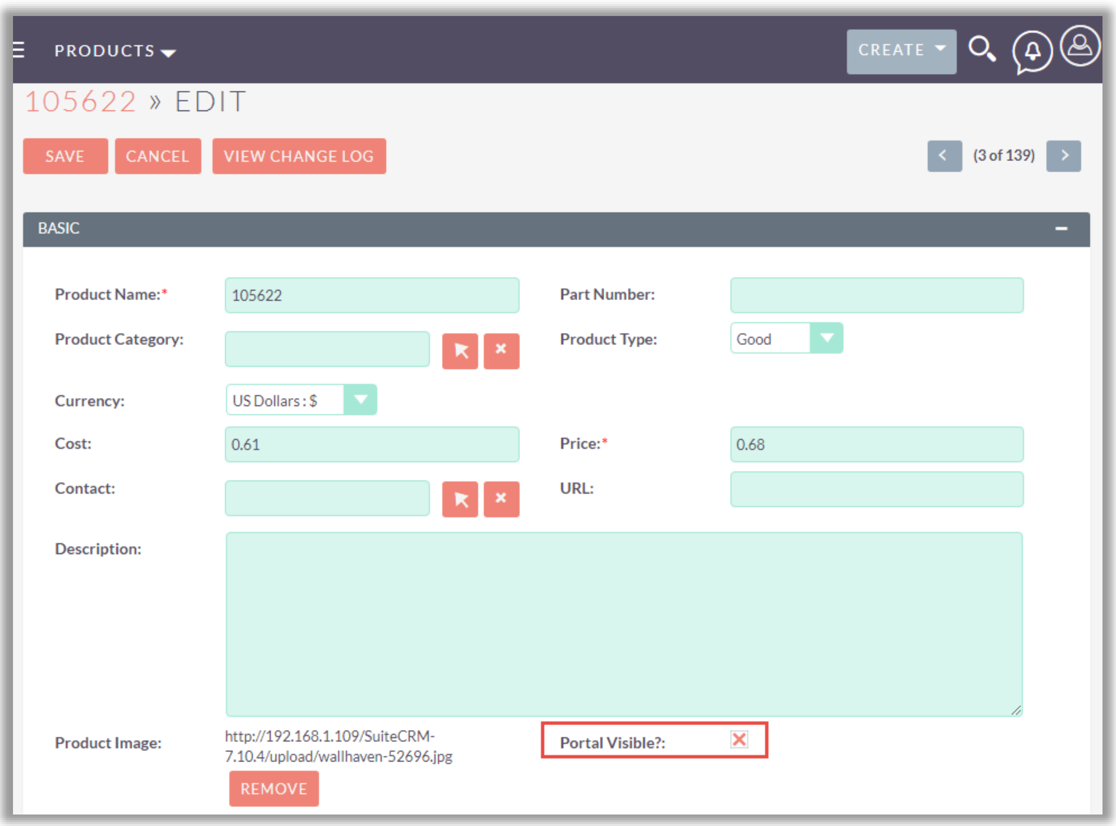


Product Page:

- 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.

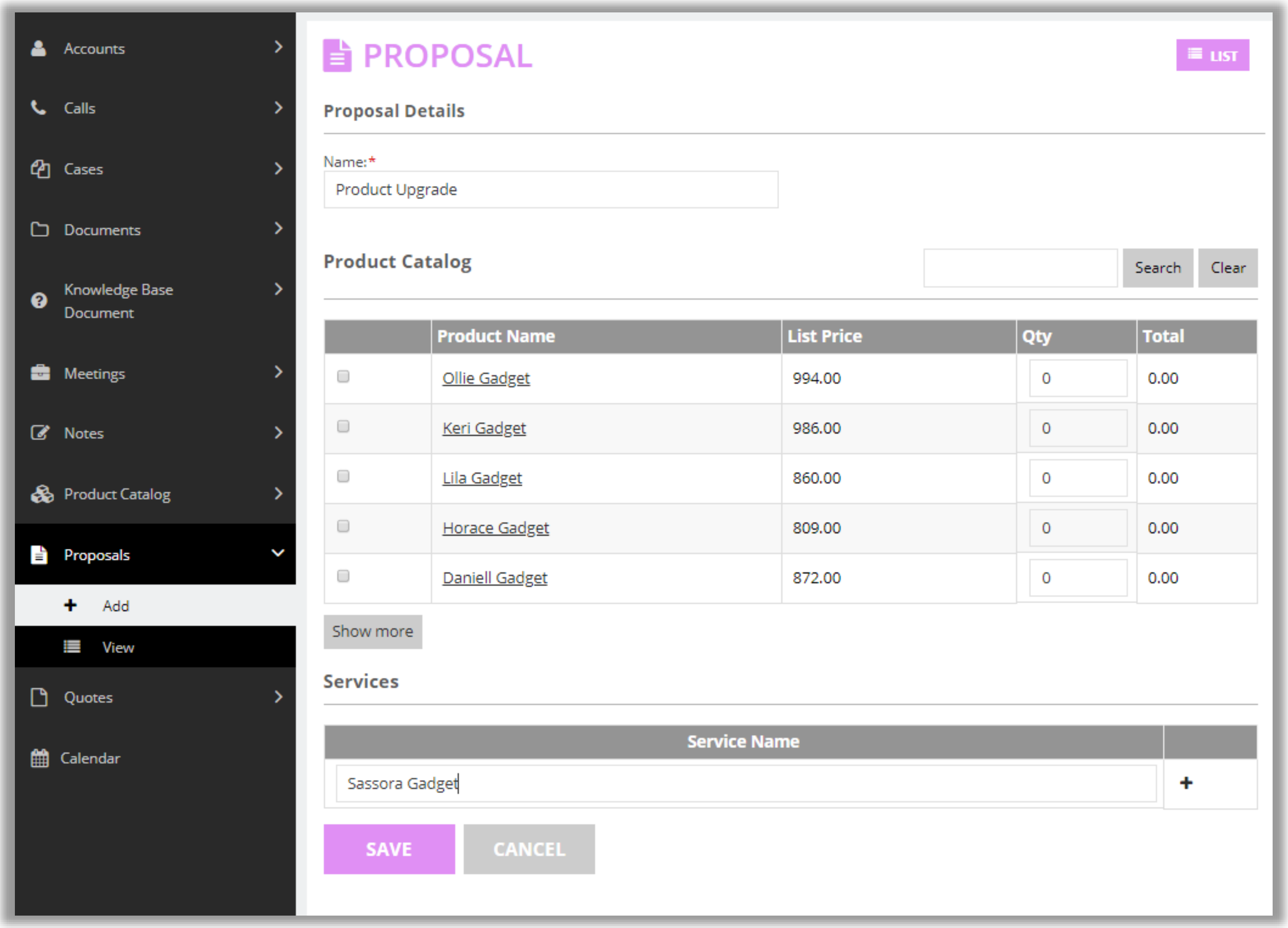


Note: Only those products will be visible in portal which are set as "portal visible" by admin from the detail view of portal.

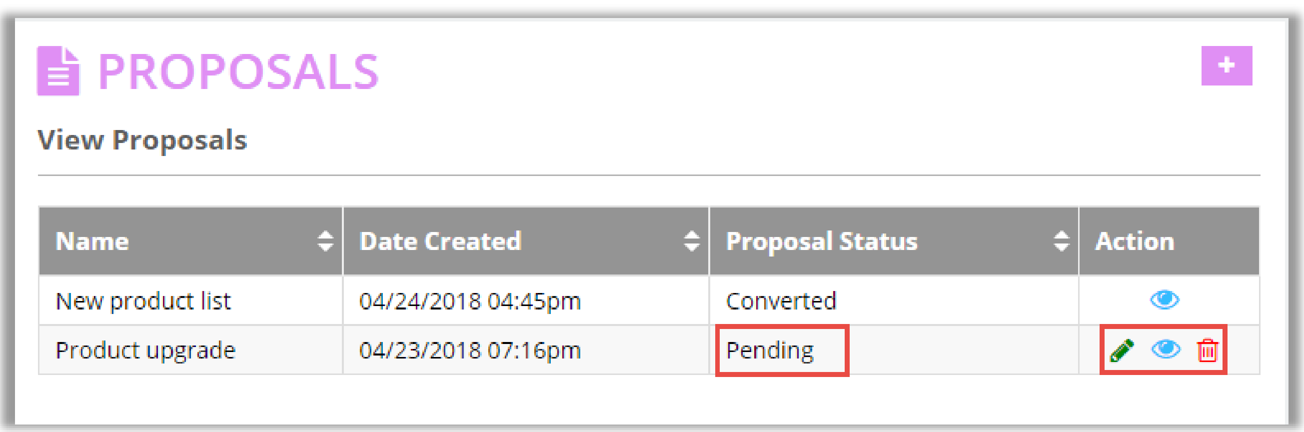


Proposals:

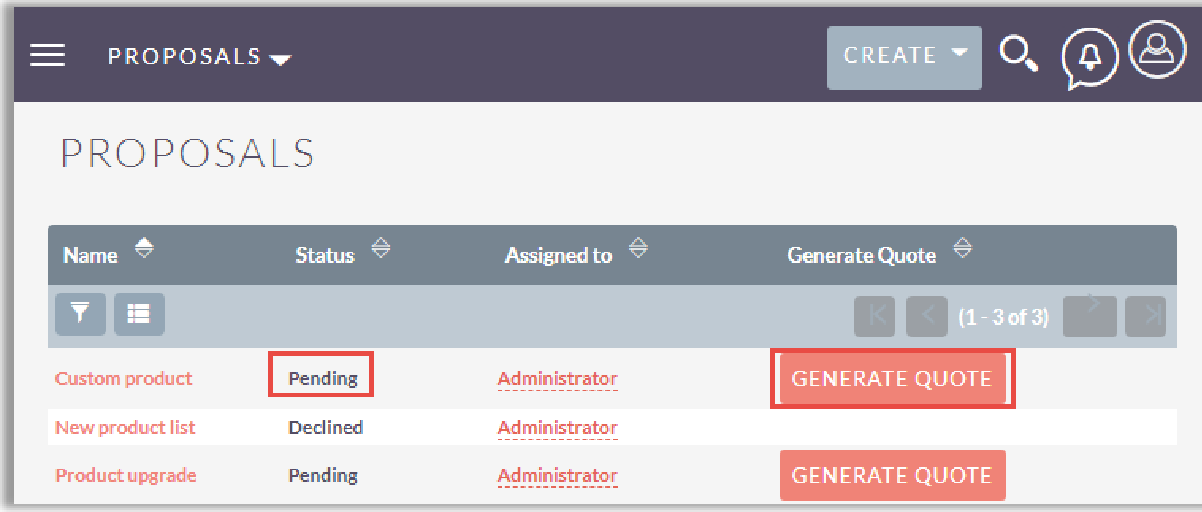
- You can create proposal with the required products and services.



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

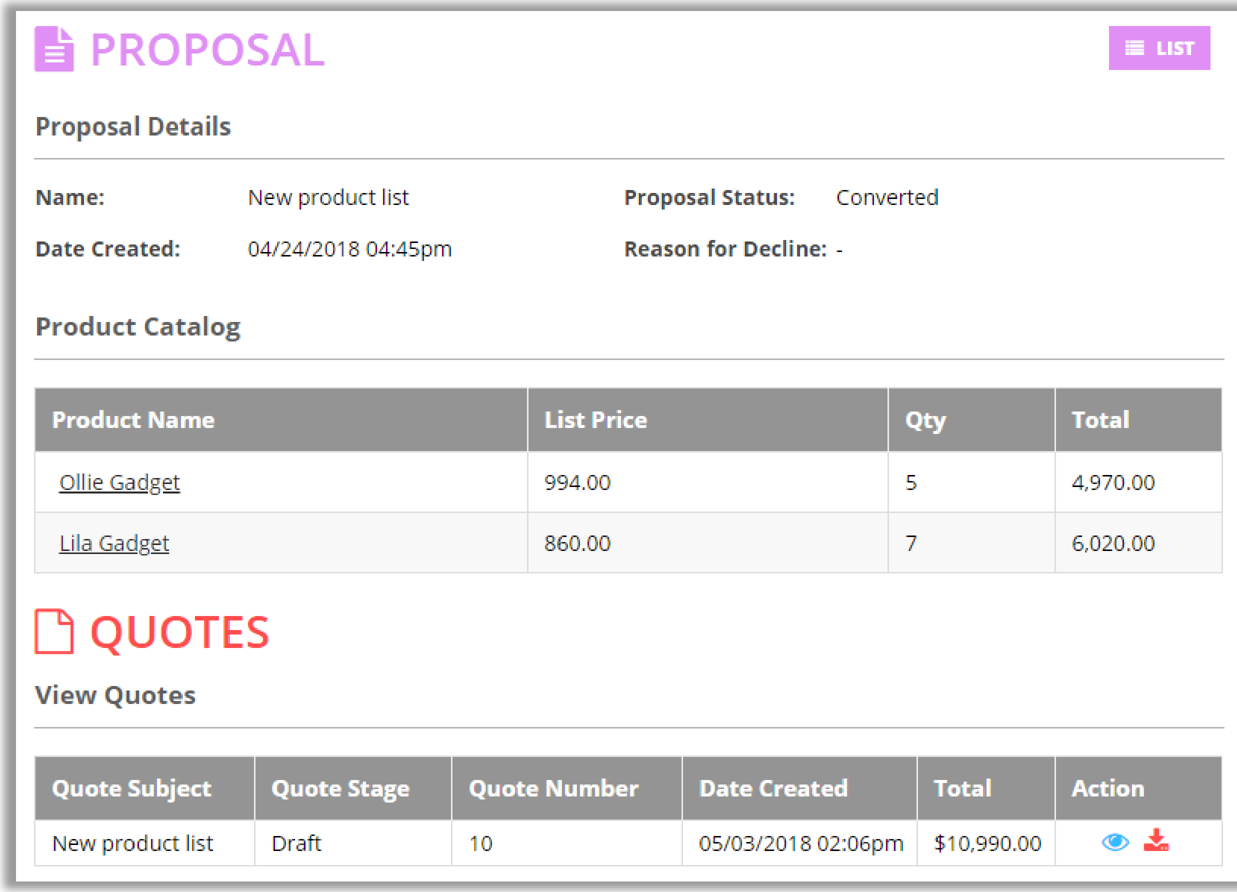


- Admin can convert the proposal to quote by **"Convert to Quotes"** option.



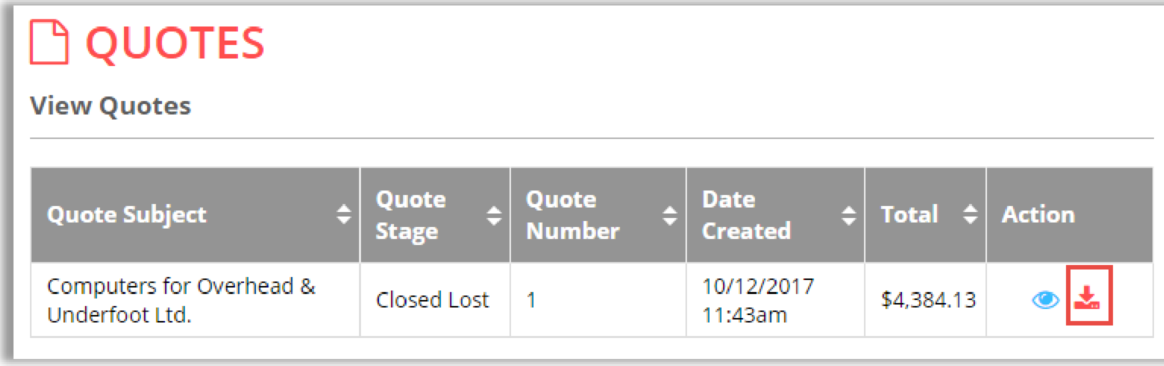
Note: Proposal cannot be cannot be changed once the proposal is converted or declined by admin.

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



View Quotes, Invoices and Contracts:

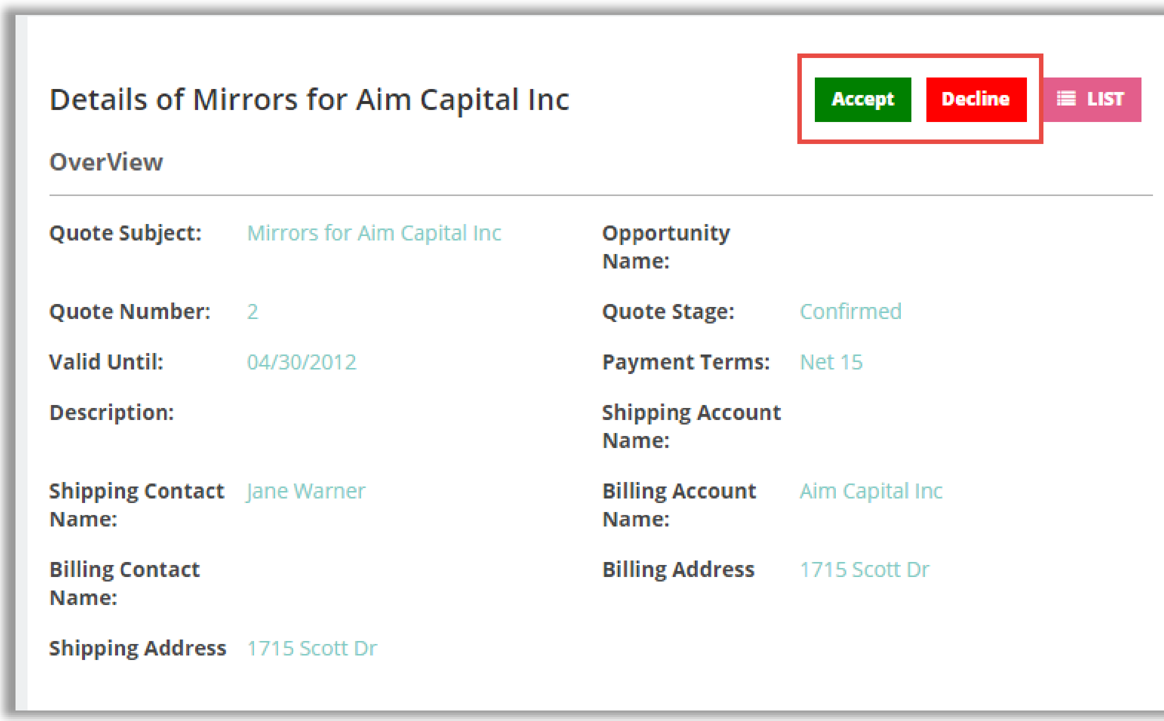
- View or Download Quotes, Invoices and Contracts added by admin from SuiteCRM side in Portal.



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

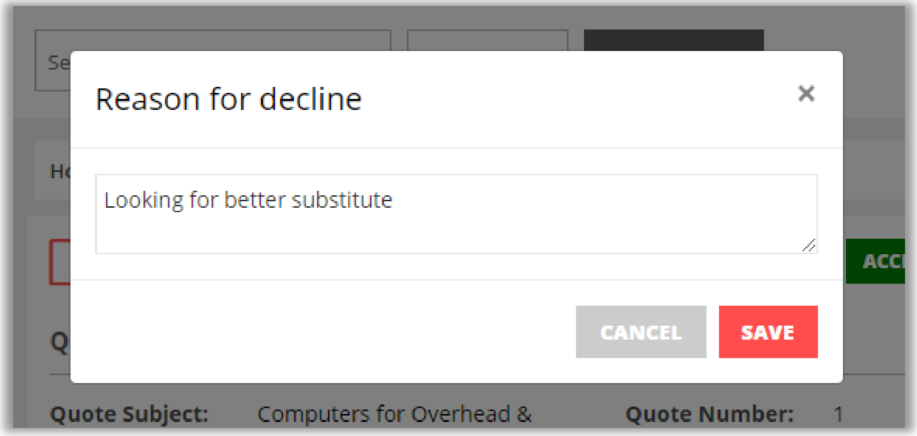
Accept or Decline Quote from Portal:

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

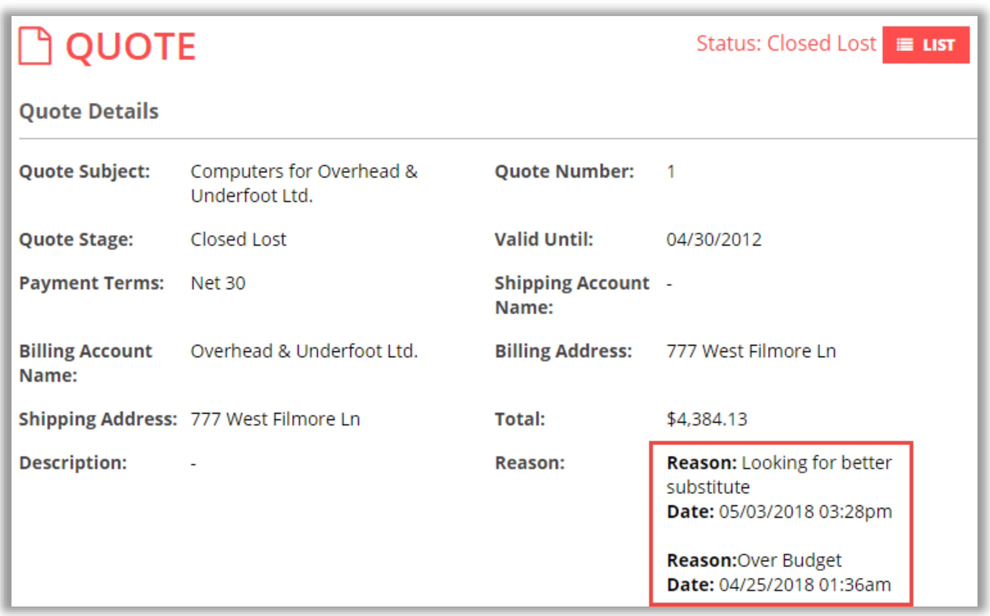


- On clicking **"Accept"** button the quote stage changes to **"Closed Accepted"**

- 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.

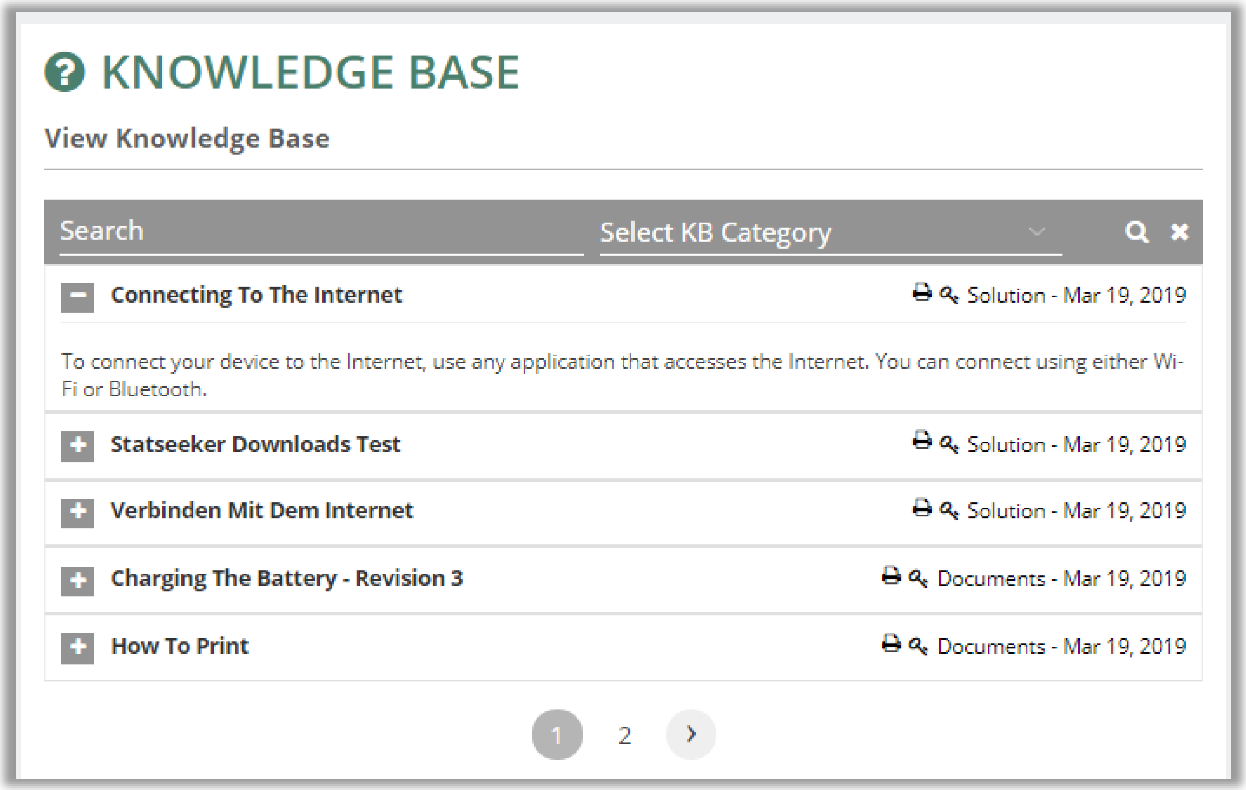


- Admin can edit the quotation on the basis of rejection reason and resend the same to user.

Note: This cannot be changed again from the portal.

Knowledge Base:

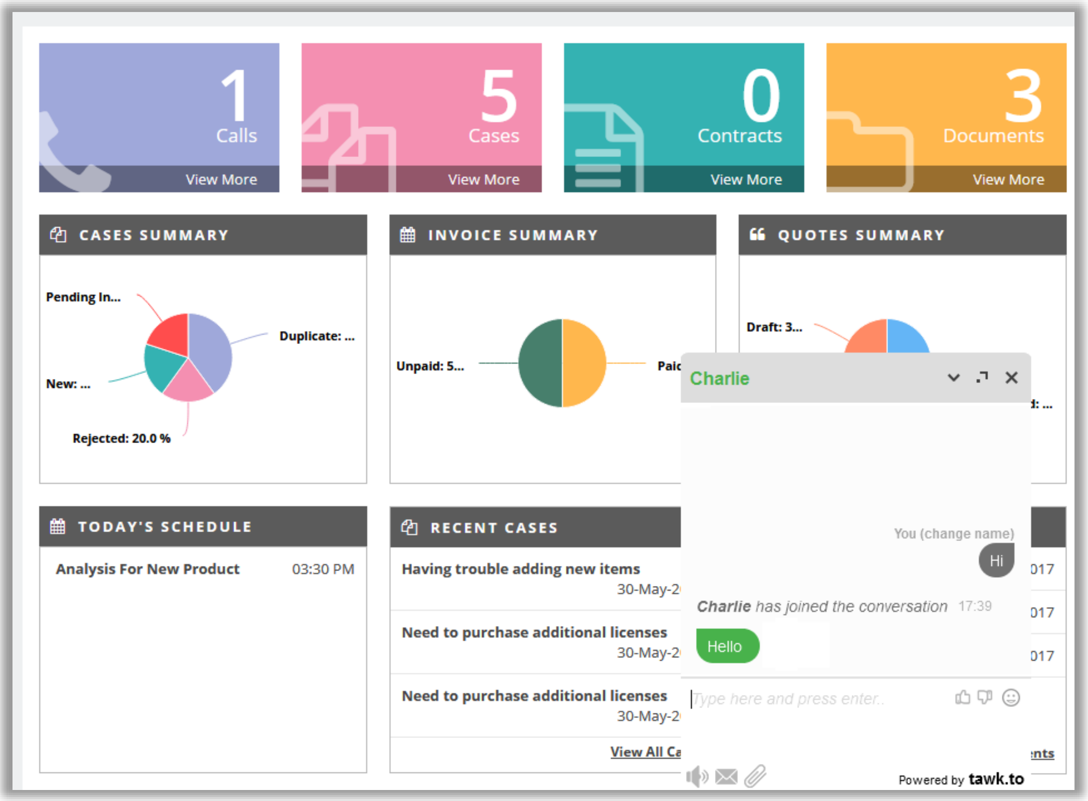
- Access the Knowledge Base module of SuiteCRM from portal to view question and answers based on category.



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

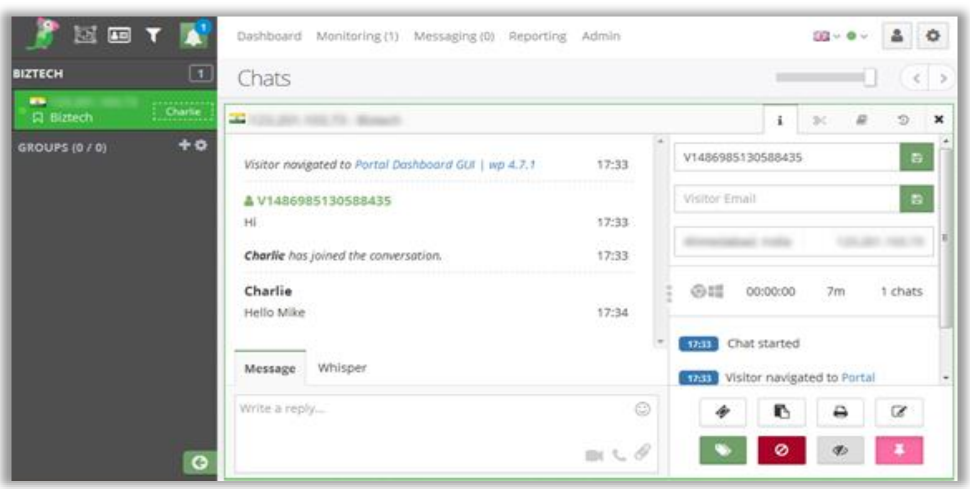
Chatting:

- 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/suitecrm-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