

18.3 Customer Portal

You can configure the functions of your customer portal through the Customer Portal entry.

In Basic Settings you can:

1. choose which entries (modules) must be active on the portal side
2. define the sorting of entries

In the Advanced Settings you can define:

the visibility of the data through the View all records option.

BASIC SETTINGS	ADVANCED SETTINGS	
Module	Sequence	Visible
Trouble Tickets	↓	✓
FAQ	↑ ↓	✓
Invoice	↑ ↓	✓
Quotes	↑ ↓	✓
Products	↑ ↓	✓
Services	↑ ↓	✓
Documents	↑ ↓	✓
Contacts	↑ ↓	✓
Accounts	↑ ↓	✓
Assets	↑ ↓	✓
Project Milestones	↑ ↓	✓
Project Tasks	↑ ↓	✓
Projects	↑	✓

- **Yes:** the customer displays both the data related to their contact details (tickets, documents, etc.) and the data related to the company registry to which they are linked

- **No:** the customer displays only the data related to their contact details and not those related to the company to which they are linked.

Through the Select user option (**a disabled user can also be chosen**), it is possible to select a CRM user, also disabled, with a specific configuration of entries for the standard fields. The portal will display precisely those items in the available drop-down menus. When a Ticket is created by the Client Portal, it is assigned to this user. It is possible, however, to assign the Ticket to another CRM user. The assignee will receive an immediate email notification. This function is very useful for the management of active Tickets.

BASIC SETTINGS

ADVANCED SETTINGS

Module	View All Related Records ?
Contacts	<input checked="" type="radio"/> Yes <input type="radio"/> No
Accounts	<input checked="" type="radio"/> Yes <input type="radio"/> No
Documents	<input checked="" type="radio"/> Yes <input type="radio"/> No
Trouble Tickets	<input checked="" type="radio"/> Yes <input type="radio"/> No
Products	<input checked="" type="radio"/> Yes <input type="radio"/> No
FAQ	<input checked="" type="radio"/> Yes <input type="radio"/> No
Quotes	<input checked="" type="radio"/> Yes <input type="radio"/> No
Invoice	<input checked="" type="radio"/> Yes <input type="radio"/> No
Services	<input checked="" type="radio"/> Yes <input type="radio"/> No
Assets	<input checked="" type="radio"/> Yes <input type="radio"/> No
Project Milestones	<input checked="" type="radio"/> Yes <input type="radio"/> No
Project Tasks	<input checked="" type="radio"/> Yes <input type="radio"/> No
Projects	<input checked="" type="radio"/> Yes <input type="radio"/> No

Select the Users

usertest12345@gmail.com

The above selected User profile will manage the fields shown in the Customer Portal

Select the Template

Dati di registrazione ed accesso

The above selected template will be used to send the mail of subscription to the portal.

Save

Through the Select email template option, you can decide which email template the system should use to communicate the access data to the portal.

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