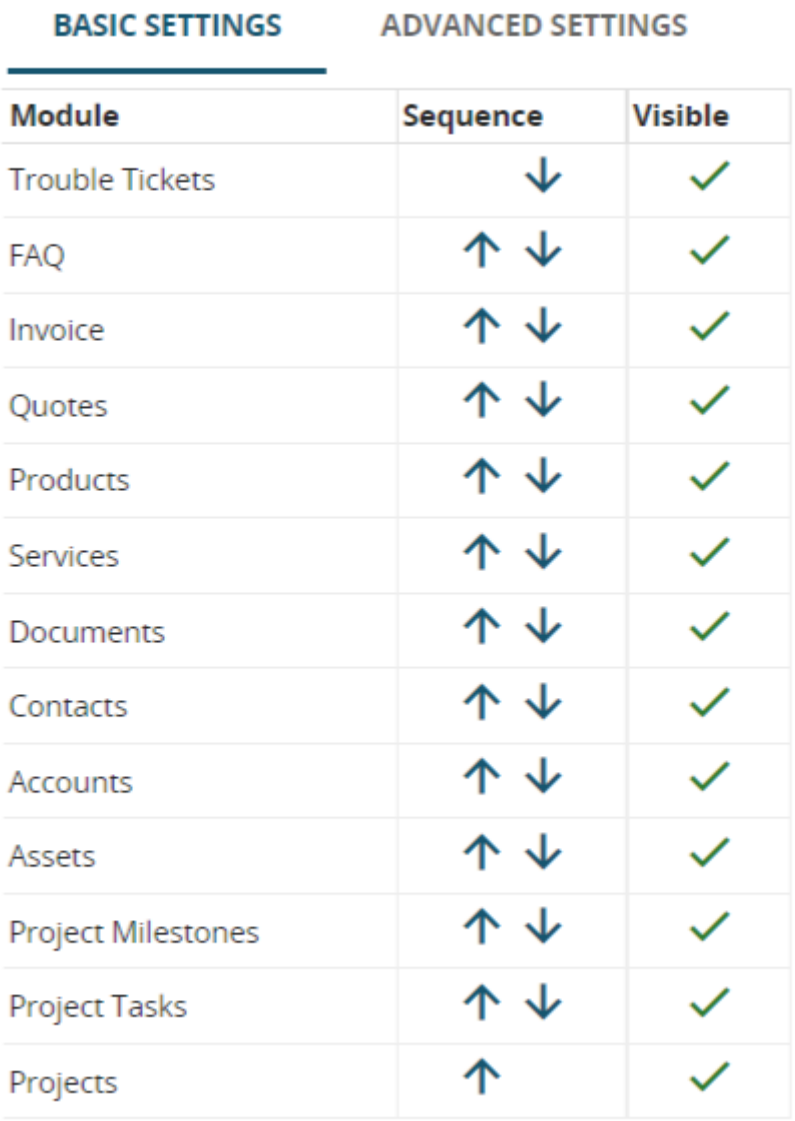
18.3 Customer Portal

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

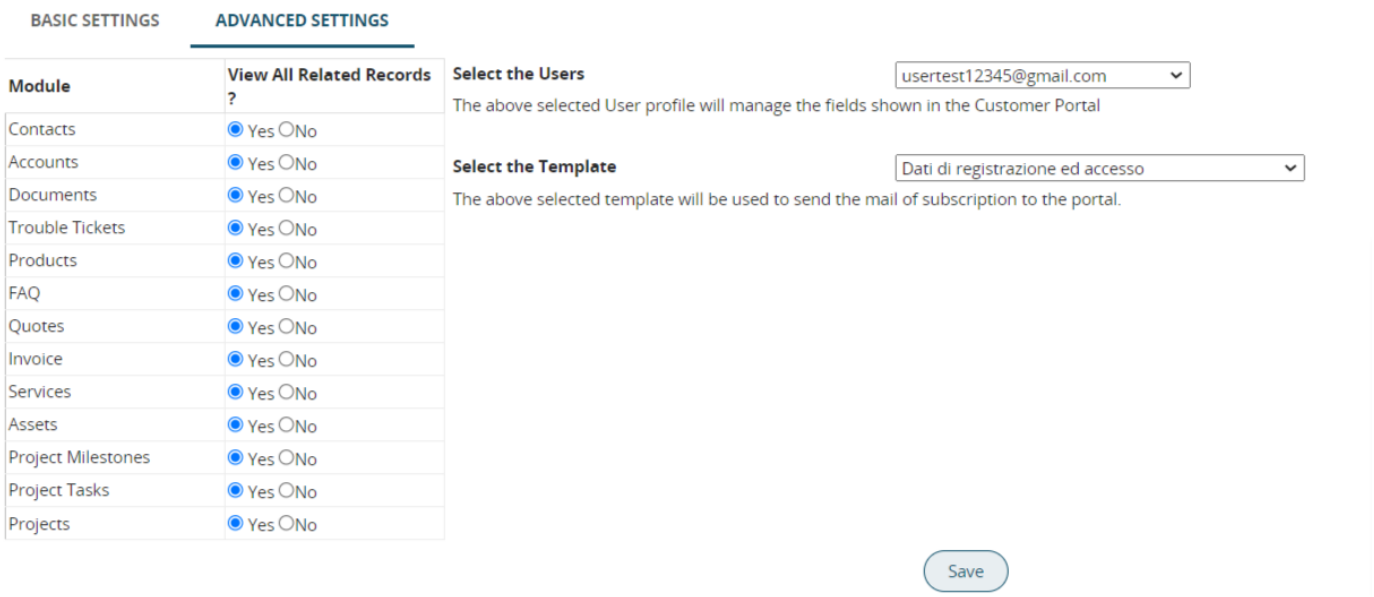
In the Advanced Settings you can define:
the visibility of the data through the View all records option.



- **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.



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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