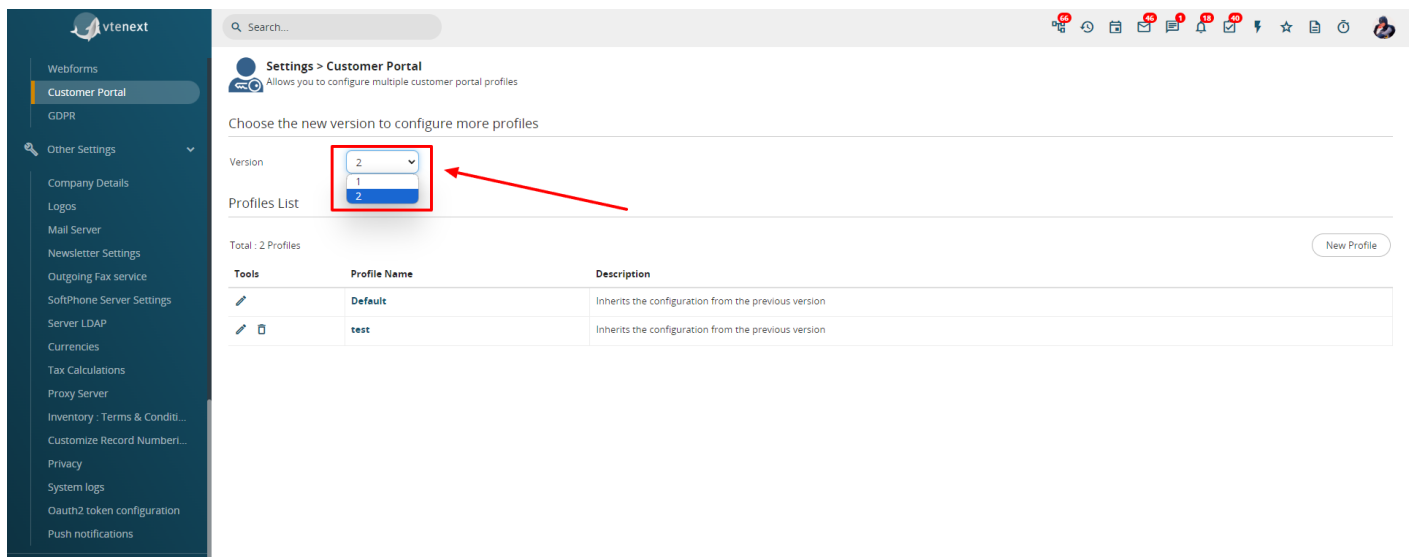


# 18.3 Customer Portal

It's possible to configure the functions of your customer portal through the 'Customer Portal' section within the settings.

In updated versions of vtenext (i.e., when transitioning from an old release to the current one), you will be able to choose via a dropdown menu which version of the portal to make available for your customers.



The screenshot shows the 'Settings > Customer Portal' configuration page in vtenext. The left sidebar contains a menu with options like Webforms, Customer Portal, GDPR, and Other Settings. The main content area has a search bar and a title 'Settings > Customer Portal' with a subtitle 'Allows you to configure multiple customer portal profiles'. Below this, there's a section 'Choose the new version to configure more profiles' with a 'Version' dropdown menu. The dropdown menu is highlighted with a red box, and a red arrow points to it. The dropdown menu shows two options: '1' and '2'. Below the dropdown is a 'Profiles List' table with two columns: 'Tools' and 'Profile Name'. The table has two rows: 'Default' and 'test'. The 'Default' row has a 'Tools' icon of a pencil and a 'Description' of 'Inherits the configuration from the previous version'. The 'test' row has a 'Tools' icon of a pencil and a 'Description' of 'Inherits the configuration from the previous version'. There is also a 'New Profile' button in the top right corner of the table area.

However, for new installations there won't be a choice, and you can only use the new Portal (Version 2).

## CUSTOMER PORTAL VERSION 1

In Basic Settings, you can:

1. choose which items (modules) should be active on the portal side;
2. define the order of the items;

**In Advanced Settings, you can further define:**

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

## 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 the email template option you can decide which email template the system should use to communicate portal access information.

## CUSTOMER PORTAL VERSION 2 (some functions are paid)

The new version of the Customer Portal provides an entirely new experience for the accessing customer. It allows configuring interface views through the creation of dedicated Profiles, directly assigning them to individual Contacts from the CUSTOMER PORTAL INFORMATION section.

Search...

Contact Benedetti Manuel

Edit

no	no
Vendor Name	Receive newsletter
	yes
Assigned To	Time created
admin (Administrator)	23-08-2023 16:54:30
Modified Time	Creator
23-08-2023 16:57:53	admin (Administrator)

Customer Portal Information

Portal User

yes

Support Start Date

23-08-2023

Support End Date

23-08-2024

Profile

Default

Address Information

Mailing Street

Other Street

Mailing PO Box

Other PO Box

Mailing City

Other City

Mailing State

Other State

Mailing Postal Code

Other Postal Code

SHORTCUTS

Talks

Notes

RELATIONS

Potentials

Activities

Trouble Tickets

Quotes

Purchase Order

Sales Order

Products

Documents

Campaigns

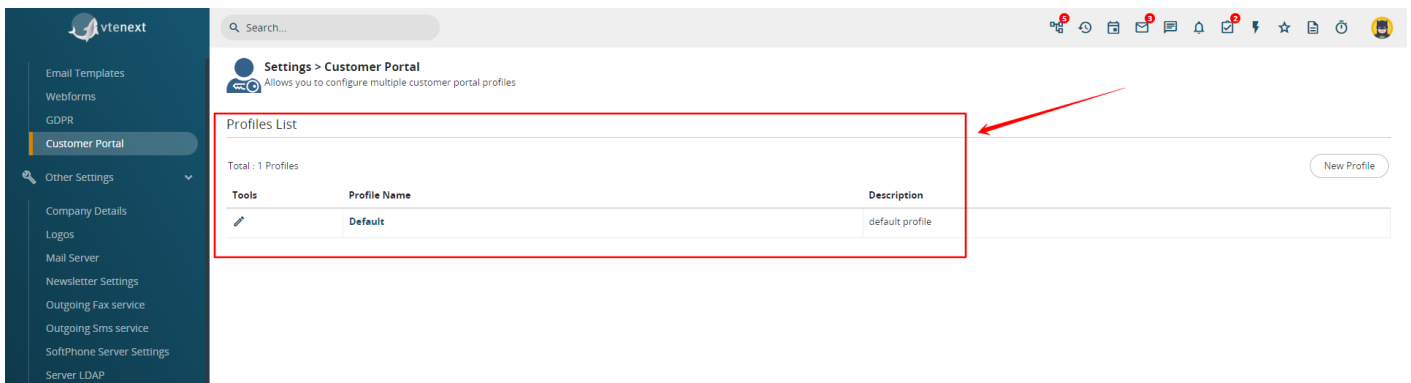
Invoice

Sms

Services

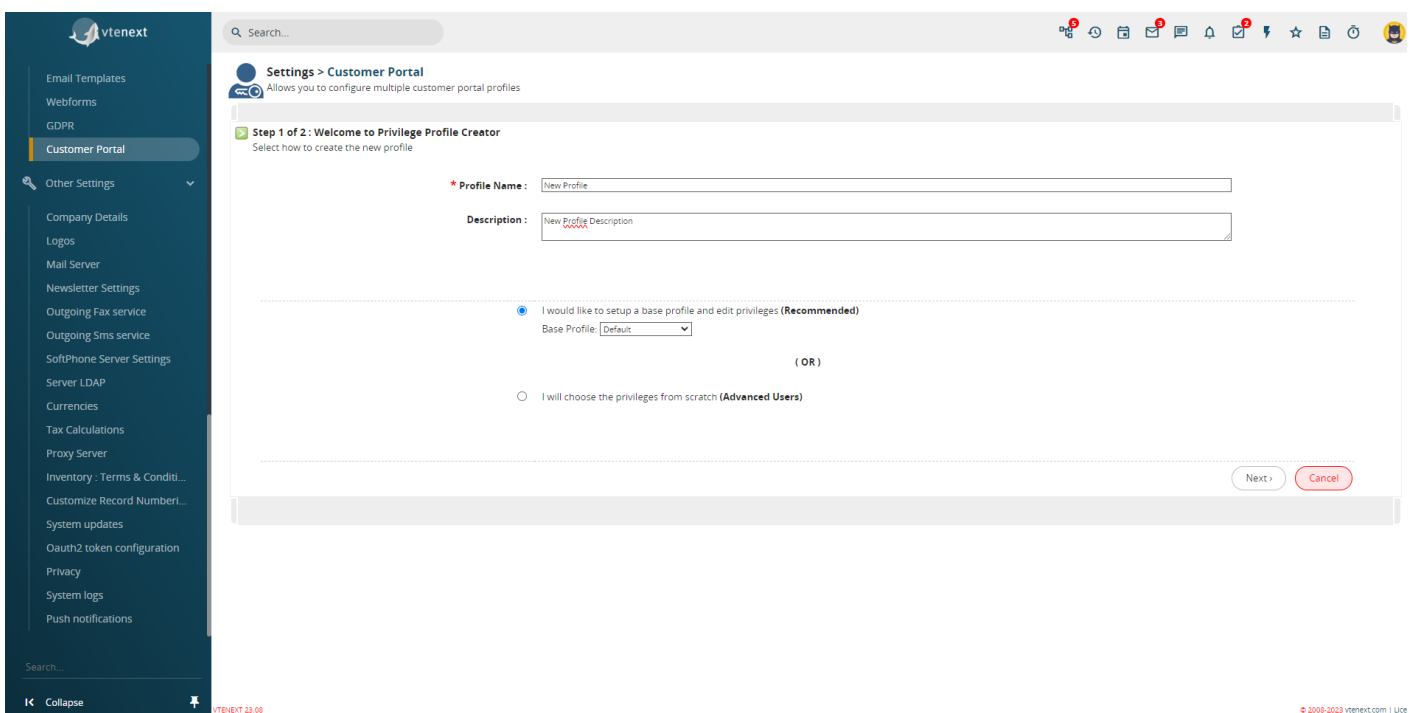
Project Plans

Now let's see how from the Customer Portal Settings, it's possible to create new Profiles (**this feature requires a fee**). By selecting Version 2 of the Portal (where this option is applicable), the new profiles configuration or management page will appear.



As standard, we have only the profile named DEFAULT, which allows starting with a basic configuration. But let's see how to create a new custom profile.

By clicking on **NEW PROFILE** on the right side, you will access the creation page as shown in the following image:



The page resembles the one for creating standard user profiles, so you should essentially follow the same process – choose a name, a description, and select which profile to start from for the new configuration. Finally, click on NEXT at the bottom right.

vtenext

Home

Modules

User permissions

Business Process Manager

Klondike AI

Customer tools

Other Settings

Users

Roles

Profiles

Groups

Sharing Access

Fields Access

Advanced Sharing Access

Audit Trails

User Login History

Check User Login

Process manager

Mail Converter

External data import

Synchronizations

Wizard creator

Module creator

Module settings

Picklist editor

Internationalized picklist

Linked picklist

Encrypted fields

Top menu settings

Listview colors

REST Webservices

Status fields permissions

Condition based fields

Klondike AI configuration

Email Templates

Webforms

GDPR

Customer Portal

Company Details

Logos

Mail Server

Newsletter Settings

Outgoing Fax service

Outgoing Sms service

SoftPhone Server Settings

Server LDAP

Currencies

Tax Calculations

Proxy Server

Inventory - Terms & Conditio...

Customize Record Numbering

System updates

Oauth2 token configuration

Privacy

System logs

Push notifications

Search...

K Collapse

Search...

Settings > Customer Portal > Viewing "New Profile"

Viewing access privileges for "New Profile"

Define Privileges for <New Profile>

Use the options below to set privileges

Save

Cancel

Owner

Select the user or group to which the records created by the portal will be assigned.

Useradmin (Administrator)

Notifications

Template used to send the mail of subscription to the portal

Portale - Dati di registrazione ed accesso

Template used to send the mail after change password

Portale - Cambio password

Template used to send the mail for password recovery

Portale - Recupero password

Template used to send the mail to the customer when there is a new ticket

Portale - Nuovo ticket

Template used to send the mail to the customer when there is a reply in a ticket

Portale - Risposta al ticket

Home

Configure buttons for quick actions

Add Button

Global Privileges

View all

Allows "New Profile" to view all information / modules of VTENEXT

Edit all

Allows "New Profile" to edit all information / modules of VTENEXT

Set Privileges for each Module

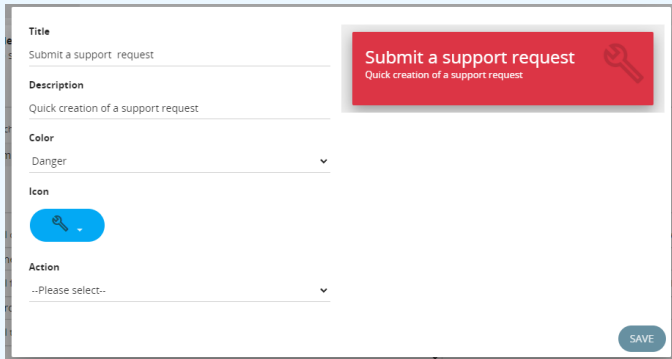
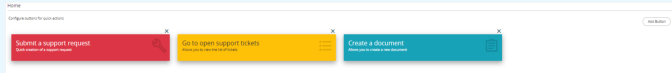
	modules to be shown	Edit Permissions			Fields & Tools Settings
		Create/Edit	View	Delete	
<input checked="" type="checkbox"/>	Accounts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Assets	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Contacts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
<input type="checkbox"/>	Delivery Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Documents	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	FAQ	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Invoice	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
<input type="checkbox"/>	Job Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input type="checkbox"/>	Potentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input type="checkbox"/>	Processes (Requested actions)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Products	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Project Milestones	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Project Tasks	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Projects	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
<input type="checkbox"/>	Purchase Order	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Quotes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
<input type="checkbox"/>	Sales Order	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input type="checkbox"/>	Service Contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Services	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
<input type="checkbox"/>	Timecards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input checked="" type="checkbox"/>	Trouble Tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
<input type="checkbox"/>	Vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼
<input type="checkbox"/>	Visit Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	▼

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On this page, you can configure several functions, which we'll summarize in the following table:

Assignee	You can select the CRM user to whom all records created from the portal will be directly assigned;
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<p><b>Notifications</b></p>	<p>It offers the possibility to select email templates, which can be customized through creation or modification using the dedicated EMAIL TEMPLATE section in SETTINGS, for exchanging information with the portal user. The options are:</p> <ul style="list-style-type: none"> <li>• Template used for the portal registration email;</li> <li>• Template used for the successful password change email;</li> <li>• Template used for the password recovery email;</li> <li>• Template used to notify the customer about the creation of a ticket;</li> <li>• Template used to notify the customer about the ticket response;</li> </ul>
<p><b>Home</b></p>	<p>It allows configuring buttons for quick actions on the portal home page.</p> <p>By clicking on ADD BUTTON on the right, you can enable a window from which to set:</p> <ul style="list-style-type: none"> <li>• Button Title</li> <li>• Button Description</li> <li>• Button color</li> <li>• Icon representing the button's function</li> <li>• Action that allows choosing to link a module or trigger the creation of a record in a specific module</li> </ul> <div data-bbox="810 1128 1485 1485">  </div> <p><i>Button Creation Screen</i></p> <div data-bbox="810 1518 1485 1590">  </div> <p><i>Button List Viewing Screen</i></p> <p><b>The order of the buttons can be changed through drag-and-drop.</b></p>
<p><b>Global Privileges</b></p>	<p>It offers the possibility to configure all privileges for each individual user profile, determining what they can or cannot do or see through the customer portal. You can apply these settings to all modules of vtenext.</p>

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