

18.3.1 Enabling the customer portal for a user

Only contacts present in vtenext can be enabled for the Customer Portal. Within the individual contact record, it's necessary to check the checkbox in the PORTAL USER section and input a start support date and an end date.

Upon enabling the checkbox, the system autonomously sends a message to the email address provided in the contact's email field, containing the credentials to access the Customer Portal. The specified dates determine the actual access period.

The screenshot displays the vtenext interface for a contact record titled "Contact Davis Jennifer". The interface includes a top navigation bar with a search field and various utility icons. A left sidebar contains navigation icons for home, contacts, messages, calendar, and settings. The main content area is divided into several sections: a header section with "admin (Administrator)" and a "Modified Time" of "31-07-2023 16:49:41"; a "Customer Portal Information" section, which is highlighted with a red rectangular box; and an "Address Information" section. The "Customer Portal Information" section contains fields for "Portal User" (set to "no"), "Support Start Date", "Support End Date", "Profile" (set to "Default"), and a checkbox. The "Address Information" section includes fields for "Mailing Street" (999 Baker Way), "Mailing PO Box", "Mailing City" (San Mateo), "Mailing State" (CA), and "Mailing Postal Code" (99999). A right sidebar contains "SHORTCUTS" and "RELATIONS" sections. The "RELATIONS" section lists various modules with icons and counts, such as "Sales Order" (2), "Potential", "Activities", "Trouble Tickets", "Quotes", "Purchase Order", "Products", "Documents", "Campaigns", "Invoice", and "Sms".

| Customer Portal Information | |
|-----------------------------|--------------------|
| Portal User | Support Start Date |
| no | |
| Support End Date | Profile |
| | Default |

| Address Information | |
|---------------------|-------------------|
| Mailing Street | Other Street |
| 999 Baker Way | |
| Mailing PO Box | Other PO Box |
| | |
| Mailing City | Other City |
| San Mateo | |
| Mailing State | Other State |
| CA | |
| Mailing Postal Code | Other Postal Code |
| 99999 | |

Additionally, it will be necessary to choose the Profile that the specific Portal User will have for their usage and viewing. The Profile determines how each portal user sees their data and how they can interact with the available modules.

The screenshot displays the Salesforce Customer Portal for a contact named Jennifer Davis. The interface includes a top navigation bar with a search field and various utility icons. The main content area is divided into three sections: Customer Information, Customer Portal Information, and Address Information. In the Customer Portal Information section, the 'Support Start Date' field has a dropdown menu open, showing 'Profile' and 'Default' options. A red box highlights this dropdown, and a red arrow points to it. The right sidebar contains 'SHORTCUTS' (Talks, Notes) and 'RELATIONS' (Sales Order, Potentials, Activities, Trouble Tickets, Quotes, Purchase Order, Products, Documents, Campaigns, Invoice, Sms) sections. The bottom right corner features an up arrow icon.

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