

18.3 Customer Portal - Business 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 vtenext settings interface for the Customer Portal. The left sidebar lists various settings categories, with 'Customer Portal' selected. The main content area is titled 'Settings > Customer Portal' and includes a search bar and a notification icon. Below this, there's a section 'Choose the new version to configure more profiles'. A 'Version' dropdown menu is shown with options 1 and 2, where option 2 is selected. A red arrow points to this dropdown. Below the dropdown is a 'Profiles List' table with two rows: 'Default' and 'test'. The table has columns for 'Tools', 'Profile Name', and 'Description'. A 'New Profile' button is visible on the right.

Tools	Profile Name	Description
	Default	Inherits the configuration from the previous version
	test	Inherits the configuration from the previous version

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

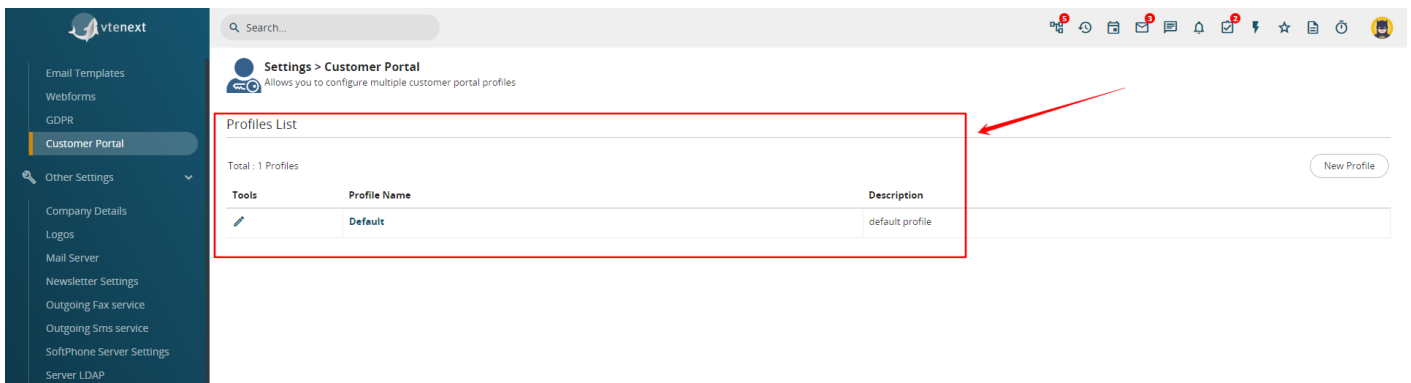
Invoice

Sms

Services

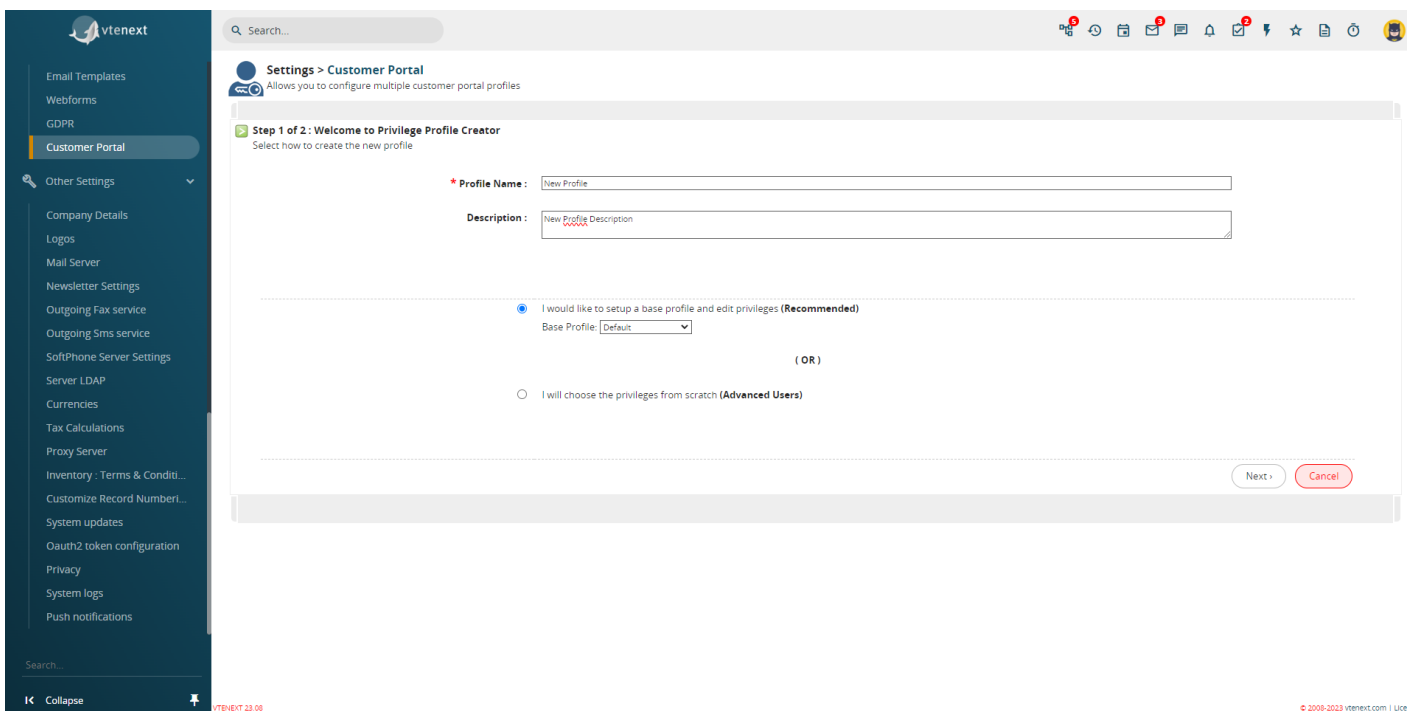
Project Plans

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.



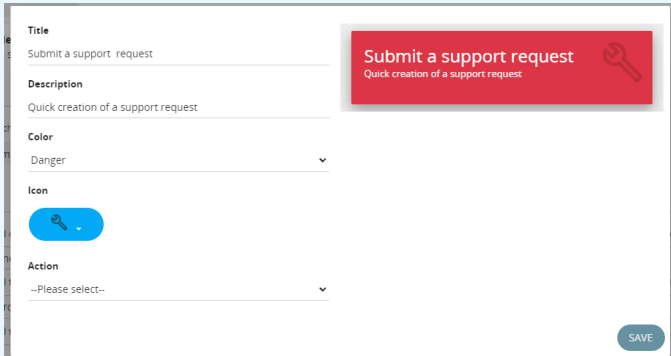
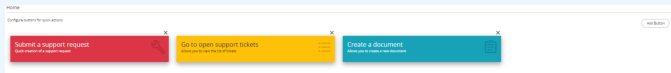
By default, only the profile named **DEFAULT** is available, allowing users to start with a basic configuration. Many modules are deactivated by default in this profile. To activate all the desired modules, it is necessary to upgrade to the Business Portal version (sold separately). Let's see how to create a 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.

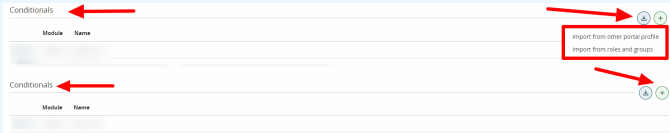
On this page, you can configure several functions, which we'll summarize in the following table:

Owner	You can select the CRM user to whom all records created from the portal will be directly assigned;
Notifications	<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">• Template used for the portal registration email;• Template used for the successful password change email;• Template used for the password recovery email;• Template used to notify the customer about the creation of a ticket;• Template used to notify the customer about the ticket response;
Home	<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">• Button Title• Button Description• Button color• Icon representing the button's function• Action that allows choosing to link a module or trigger the creation of a record in a specific module <div><p><i>Button Creation Screen</i></p><p><i>Button List Viewing Screen</i></p><p>The order of the buttons can be changed through drag-and-drop.</p></div>

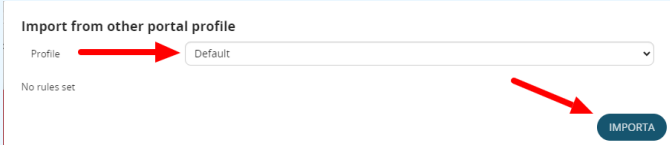
Conditionals

It is possible to set up conditional fields for the Customer Portal, so that they work exactly like in the vte interface. When they are activated, the conditions will function properly on the portal as well. There are three ways to configure them:

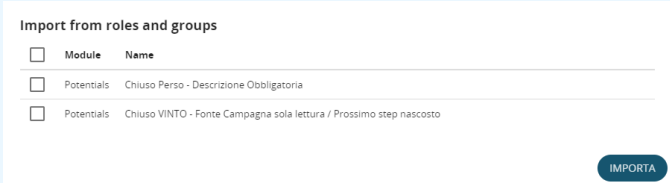
- **Import from another portal profile**
- **Import from roles and groups**
- **Create a new rule directly on the portal (Add button)**



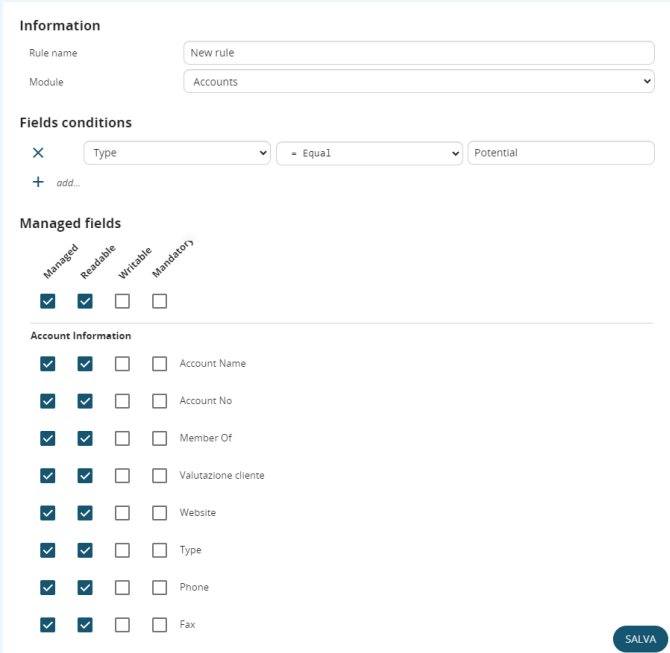
By clicking on **Import from another portal profile**, a popup will open, allowing you to select other existing profiles. Once you've selected the desired profile, you can click **Import** at the bottom right of the window to complete the process.



By clicking on **Import from roles and groups**, a popup will open, allowing you to select predefined rules for the CRM directly in the Conditional Fields section. For more details on this topic, refer to *Chapter 17.4 Conditional Fields*.



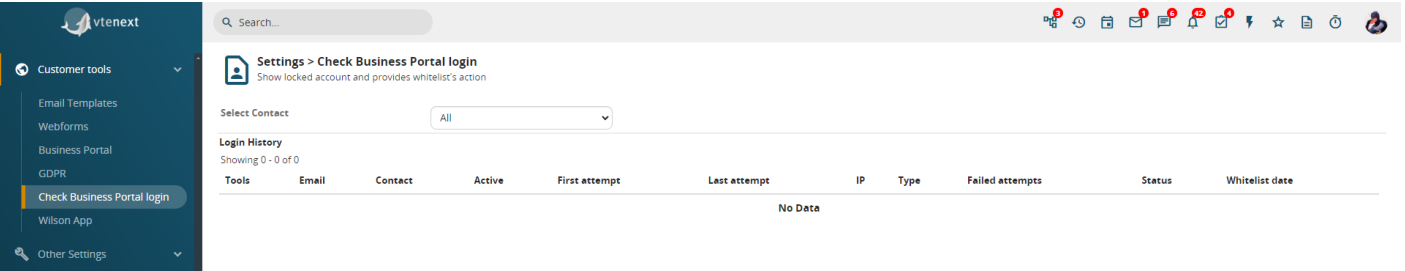
By clicking on **Add**, you can create a new rule for the portal's conditional fields, exclusive to the portal itself (it will not reflect in the CRM). The configuration follows the standard process explained in Chapter 17.4. In the example shown in the image below, you can see a rule where the company's profile becomes entirely read-only when the Status field takes the value Blocked.



Global Privileges	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.
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Unlocking a portal user

Just like CRM users, a portal user gets locked after five failed login attempts for security reasons. It is possible to unlock them through the settings in vtenext, by navigating to the **Check Business Portal login** section. On this page, you can view all blocked users and add them back to the whitelist, exactly as you would with a standard user.



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