

18.3.2 Customer Portal Interface

INTERFACE VERSION 1

Once they have entered their login details, your customer can first enter a new request for assistance and then access the entities that you have related to his contact card (only enabled modules) from the menu items on the left. Support requests by default provide for an email to be sent to the contact's email address, with the summary and ID of the ticket. Any subsequent comments will always be notified by email. Once you have dealt with the contact request, you can close the ticket (if satisfied with the result).

The image displays two screenshots of the vtenext Customer Portal Interface. The top screenshot shows the login screen with fields for Email and Password, a 'Keep me logged in' checkbox, a 'Forgot Password?' link, a language dropdown set to 'US English', and a 'LOG IN' button. The bottom screenshot shows the 'My Requests' page, which features a sidebar menu on the left with options like 'New request', 'My Requests', 'Knowledge Base', 'Invoice', 'Quotes', 'Products', 'Services', 'Documents', 'Contacts', 'Account', 'Assets', 'Project Milestone', 'Project Task', 'Project Plan', and 'My Information'. The main content area lists five requests with details such as 'Smart Working: ottimizza le tue attività di vendita grazie ai processi', 'Webinar Gratuito Domani! | Dal Remote Working allo Smart Working', and 'Speciale settore Ho.Re.Ca nel post Emergenza - Webinar Gratuito 28/04 ore 17.00 a cura di Ominext'.

Login Screen:

Email

Password

☐ Keep me logged in

[Forgot Password?](#)

US English

LOG IN

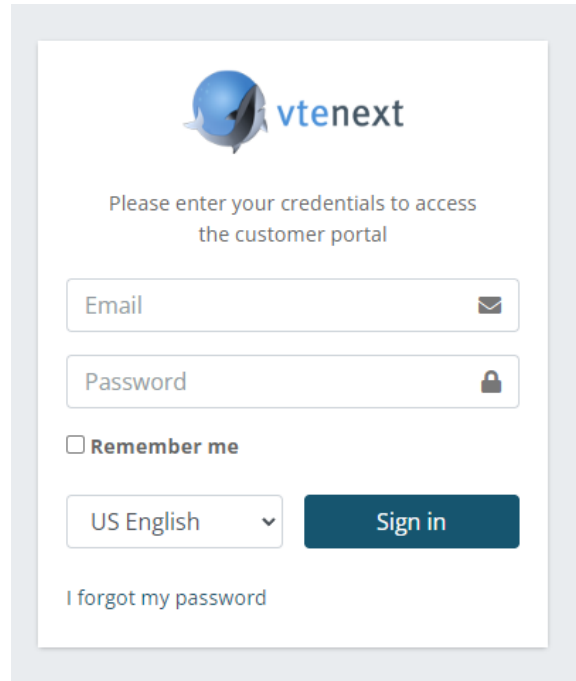
My Requests:

Show	All	Status	
HelpDesk	Smart Working: ottimizza le tue attività di vendita grazie ai processi	TT30, In Progress	SEARCH NEW REQUEST
HelpDesk	Webinar Gratuito Domani! Dal Remote Working allo Smart Working	TT31, Answered by customer	
HelpDesk	Speciale settore Ho.Re.Ca nel post Emergenza - Webinar Gratuito 28/04 ore 17.00 a cura di Ominext	TT32, Open	
HelpDesk	Nuova data: 30.04 Webinar: Dal Remote Working allo Smart Working	TT34, Open	
HelpDesk	Webinar gratuito Domani! Dal Remote Working allo Smart Working	TT38, Open	
HelpDesk	Speciale Customer Service: come gestire l'assistenza clienti in Smart Working	TT39, Open	

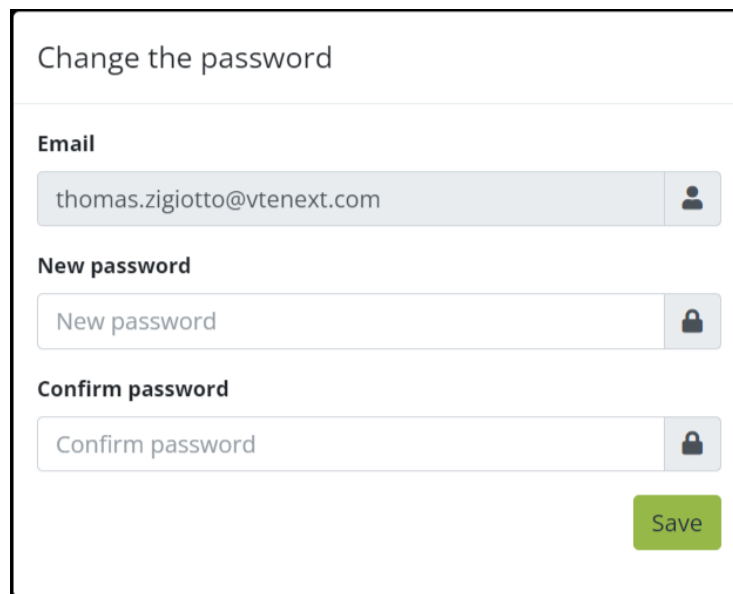
INTERFACE VERSION 2

Based on the configurations made in Chapter 18.3 and 18.3.1, the Customer Portal can appear differently for each user who uses it. This is determined by the profile assigned to that specific user:

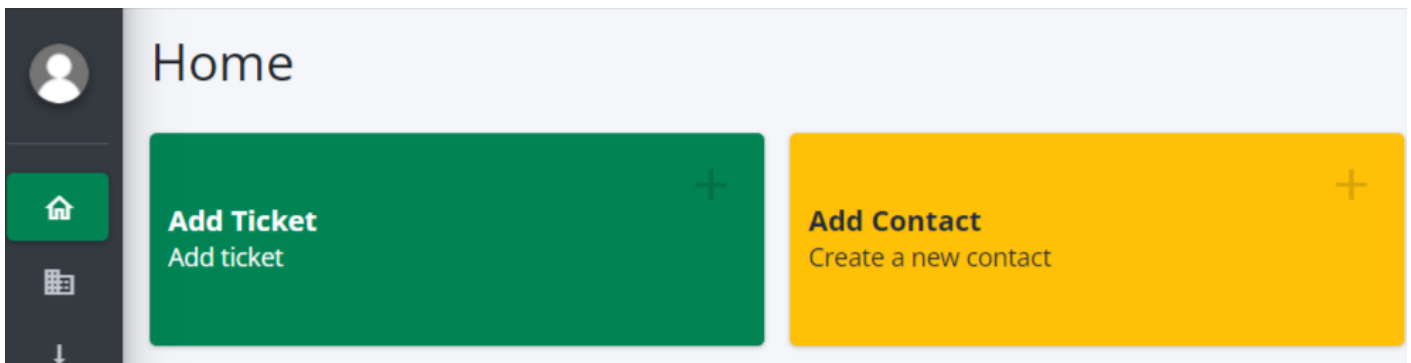
ATTENTION: the v2 portal is responsive.

The image shows a login form for the vtenext Customer Portal. At the top is the vtenext logo, which consists of a blue sphere with a white arrow pointing upwards and to the right, followed by the text "vtenext" in a blue sans-serif font. Below the logo is the text "Please enter your credentials to access the customer portal". The form contains two input fields: "Email" with an envelope icon on the right, and "Password" with a padlock icon on the right. Below these fields is a checkbox labeled "Remember me". Underneath the checkbox is a language selector dropdown menu currently set to "US English" with a downward arrow. To the right of the dropdown is a dark blue "Sign in" button. At the bottom left of the form is a link that says "I forgot my password".

This image represents the Login page for the Customer Portal.

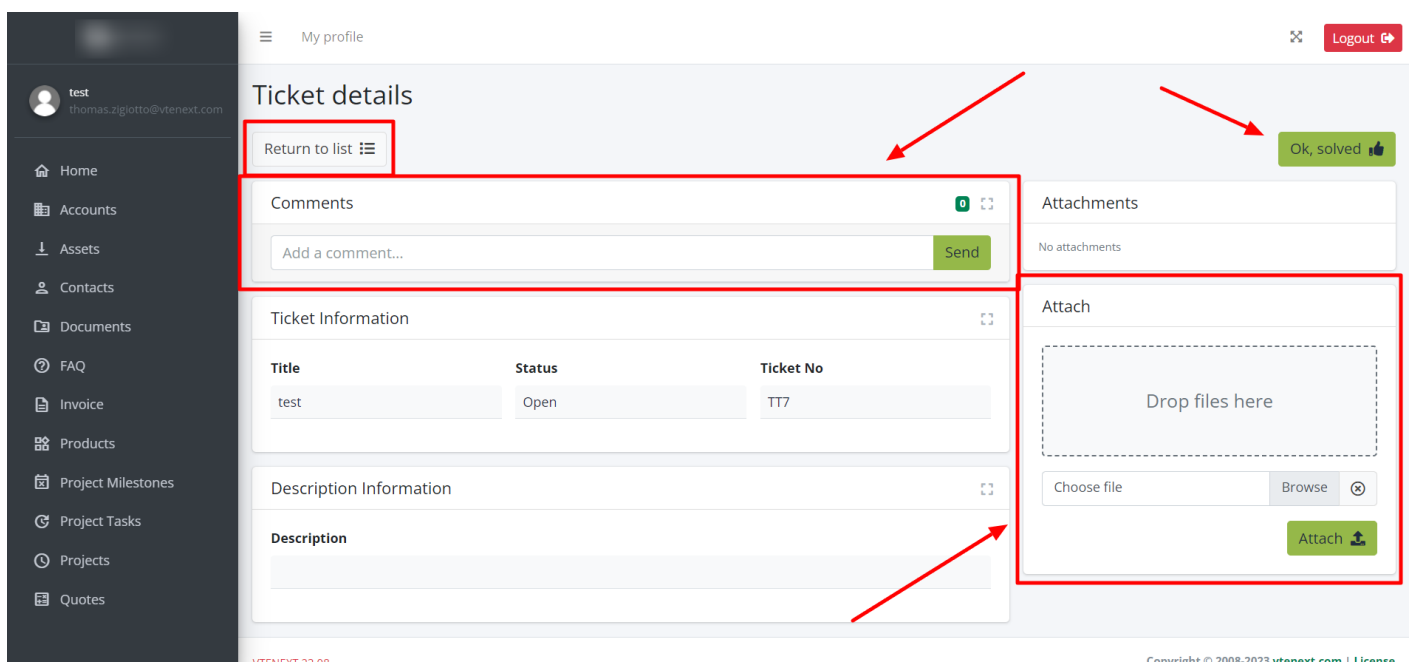
The image shows a "Change the password" form. The title "Change the password" is at the top. Below it is an "Email" field containing the text "thomas.zigiotto@vtenext.com" and a user icon on the right. Below the email field is a "New password" field with a padlock icon on the right. Below that is a "Confirm password" field, also with a padlock icon on the right. At the bottom right of the form is a green "Save" button.

Upon the first access, the Customer Portal prompts you to change the password, so you can immediately set a different one from the system-generated default password.



Here's how the portal interface looks once you've logged in:

- On the left, you will find all the modules that the user's profile allows them to access. For each module, the portal user can search among their records, create new records, and consult existing records;
- In the center, there are all the buttons that have been configured in the settings. These buttons facilitate a more user-friendly experience of the Portal;
- On the right, in addition to the LOGOUT button that allows quick logout from the platform, there is also a small button that activates full-screen mode;



Here's the interface for viewing an existing ticket. Notice the 'RETURN TO LIST' button on the left, which allows you to go back to the list view of all the customer's reports. The comments section has been placed at the top for easy access, while the area for uploading new Documents is located on the right, with the option to drag and drop them. Using the 'OK RESOLVED' button, the portal user can autonomously close the ticket. This type of display is repeated for other modules as well, with different field types

Here's how the Comments section looks. In the center, you have the back-and-forth communication between the Portal User and Customer Support. In the top-right corner, the small blue background number (3) represents the number of Comments

In this screen, you can see the list of all the tickets in the Portal. With this view, you can search based on any of the displayed fields, matching multiple columns together, or perform a general search using the box in the top-right corner. This display pattern is repeated for other modules, with field types changing accordingly

Revision #1

Created 2 September 2024 07:59:12 by Admin

Updated 2 September 2024 07:59:13 by Admin