

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).



Email

Password

Keep me logged in

[Forgot Password?](#)

US English ▼

[LOG IN](#)

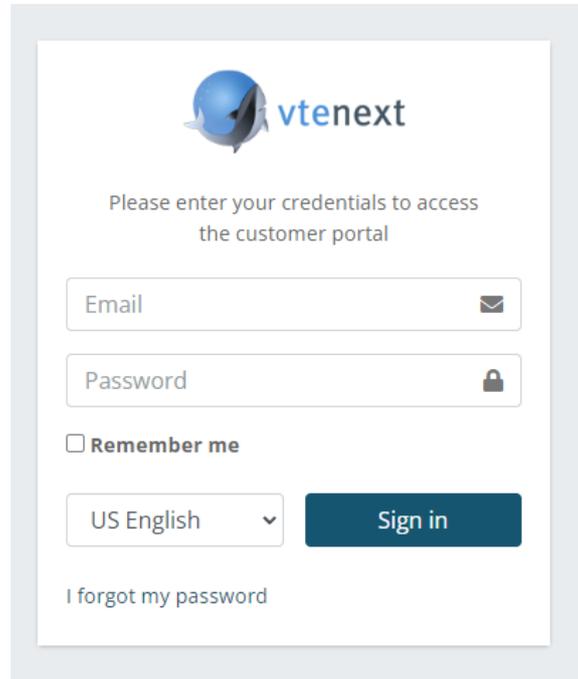
The screenshot shows the 'My Requests' page in the vtenext customer portal. On the left is a vertical navigation menu with icons and labels for: New request, My Requests, Knowledge Base, Invoice, Quotes, Products, Services, Documents, Contacts, Account, Assets, Project Milestone, Project Task, Project Plan, and My Information. The main content area is titled 'My Requests' and includes a 'Show All' dropdown and a 'Status' dropdown. Below these are two buttons: 'SEARCH' and 'NEW REQUEST'. The page displays a list of five helpdesk tickets:

- HelpDesk**
Smart Working: ottimizza le tue attività di vendita grazie ai processi
TT30, In Progress
- 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

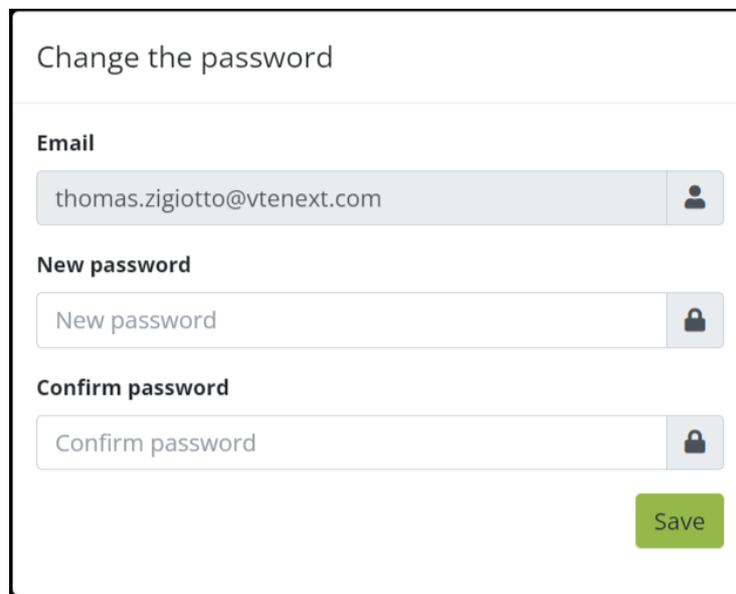
Based on the configurations made in Chapter 18.3 and 18.3.1, the Customer Portal can appear differently for each user who uses it. This is determined by the profile assigned to that specific user:

ATTENTION: the v2 portal is responsive.



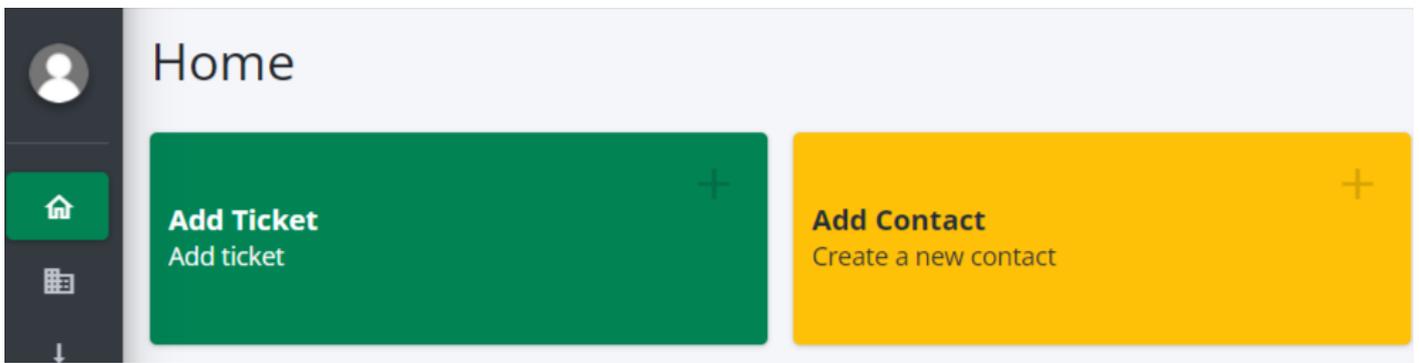
The screenshot shows the login page for the vtenext Customer Portal. At the top, there is a logo consisting of a blue globe with a white arrow pointing right, followed by the text "vtenext". Below the logo, the text reads "Please enter your credentials to access the customer portal". There are two input fields: "Email" with an envelope icon and "Password" with a lock icon. Below these fields is a checkbox labeled "Remember me". There is a dropdown menu showing "US English" and a dark blue "Sign in" button. At the bottom, there is a link that says "I forgot my password".

This image represents the Login page for the Customer Portal.



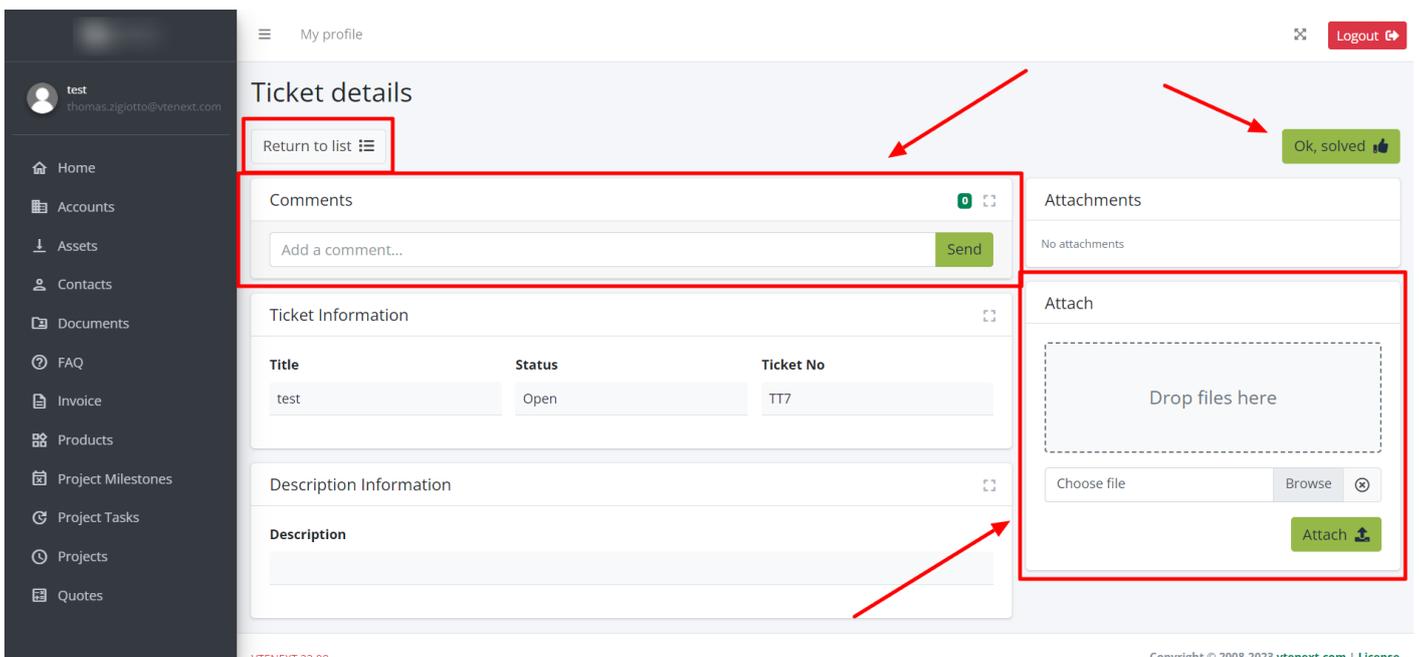
The screenshot shows a form titled "Change the password". It has three input fields: "Email" with the value "thomas.zigiotto@vtenext.com" and a user icon, "New password" with a lock icon, and "Confirm password" with a lock icon. A green "Save" button is located at the bottom right of the form.

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.

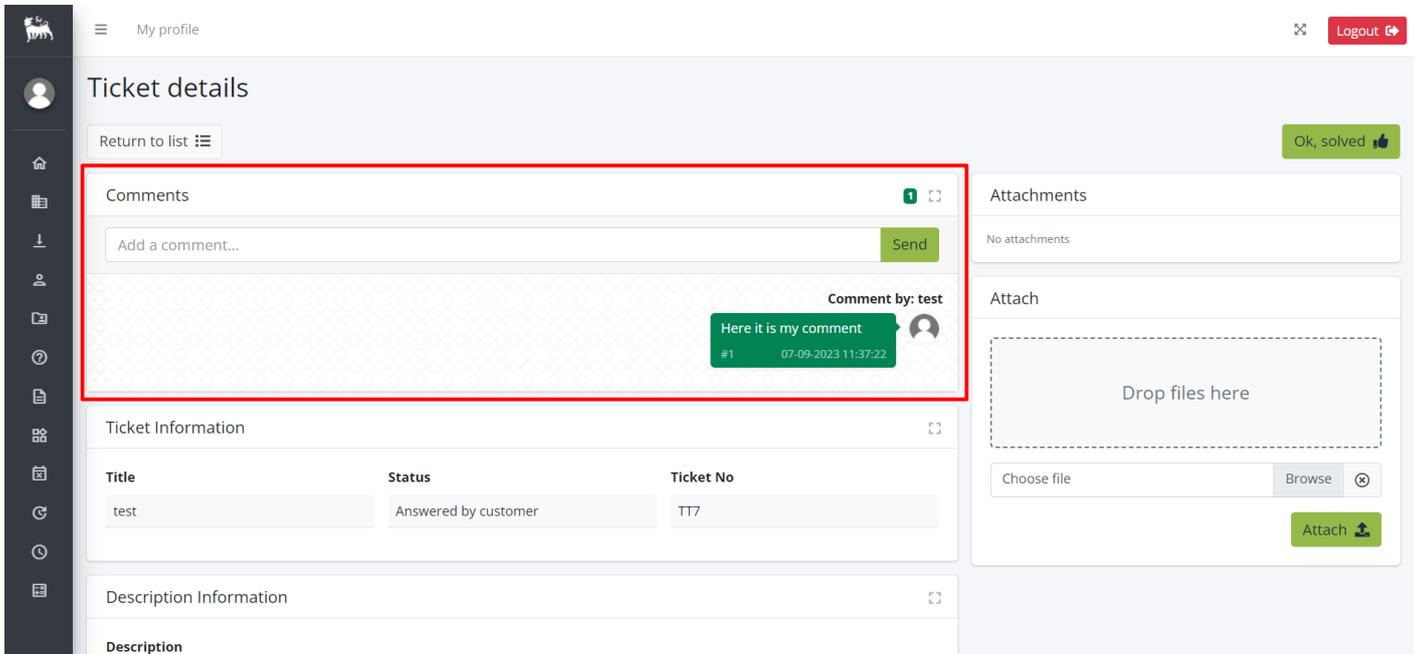


Here's how the portal interface looks once you've logged in:

- 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

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