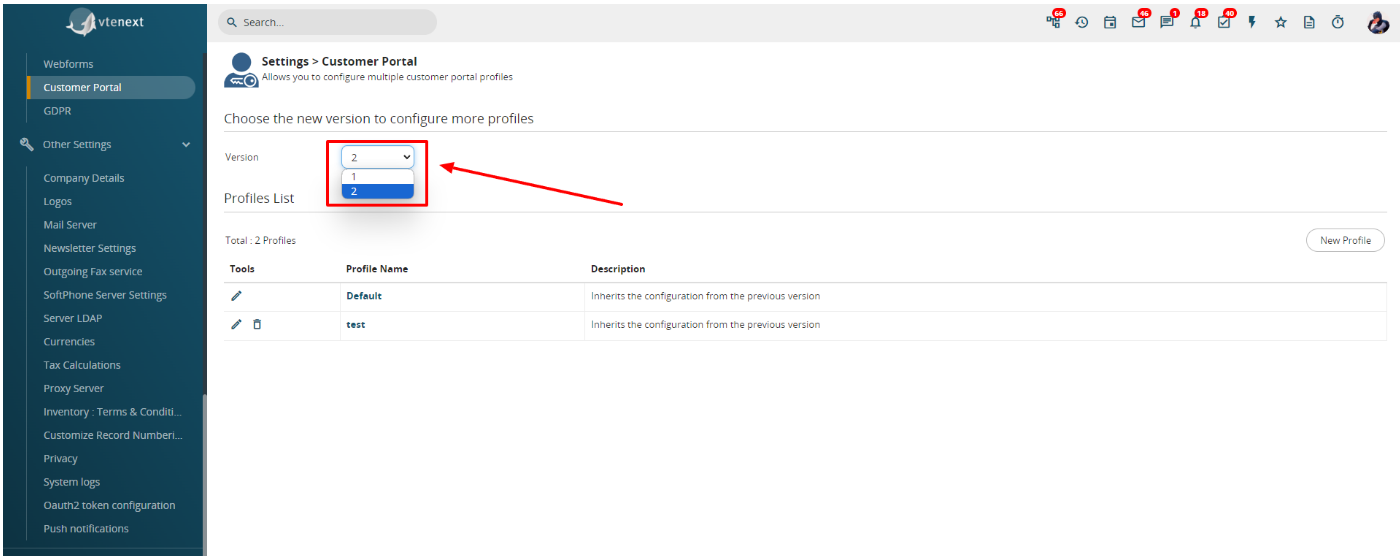
18.3 Customer Portal - Business Portal

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.



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;

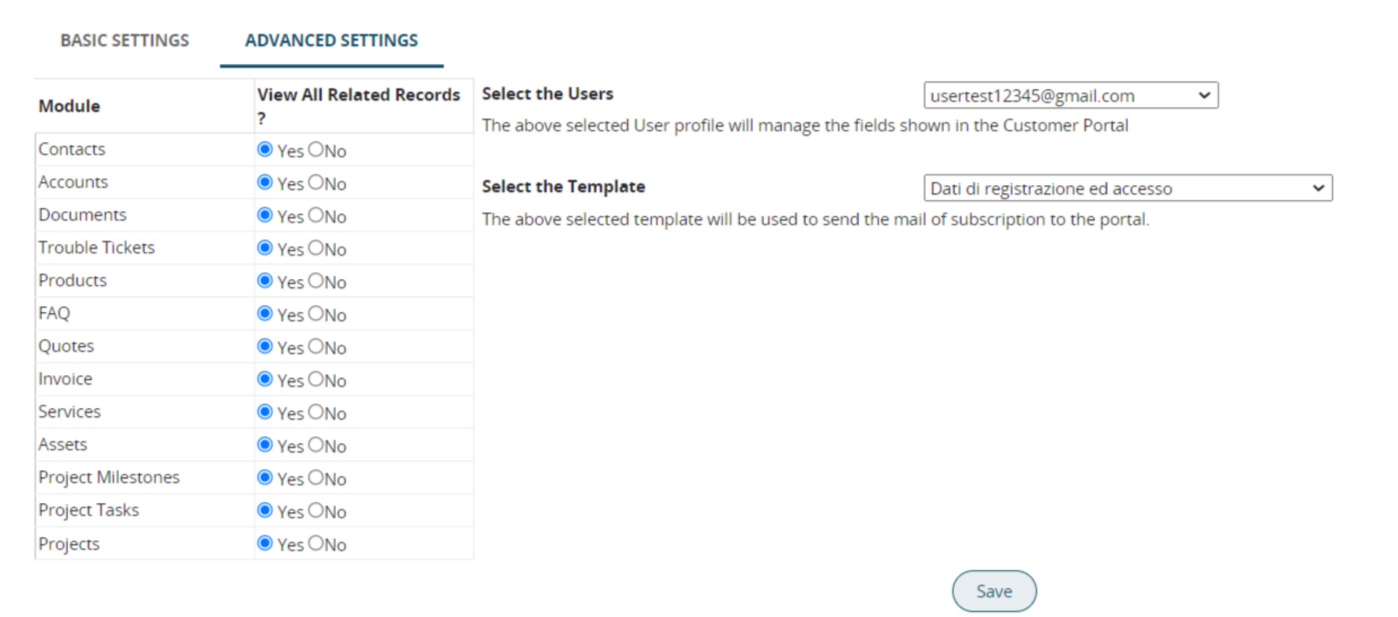
In Advanced Settings, you can further define:
the visibility of data through the option to View all records.

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.

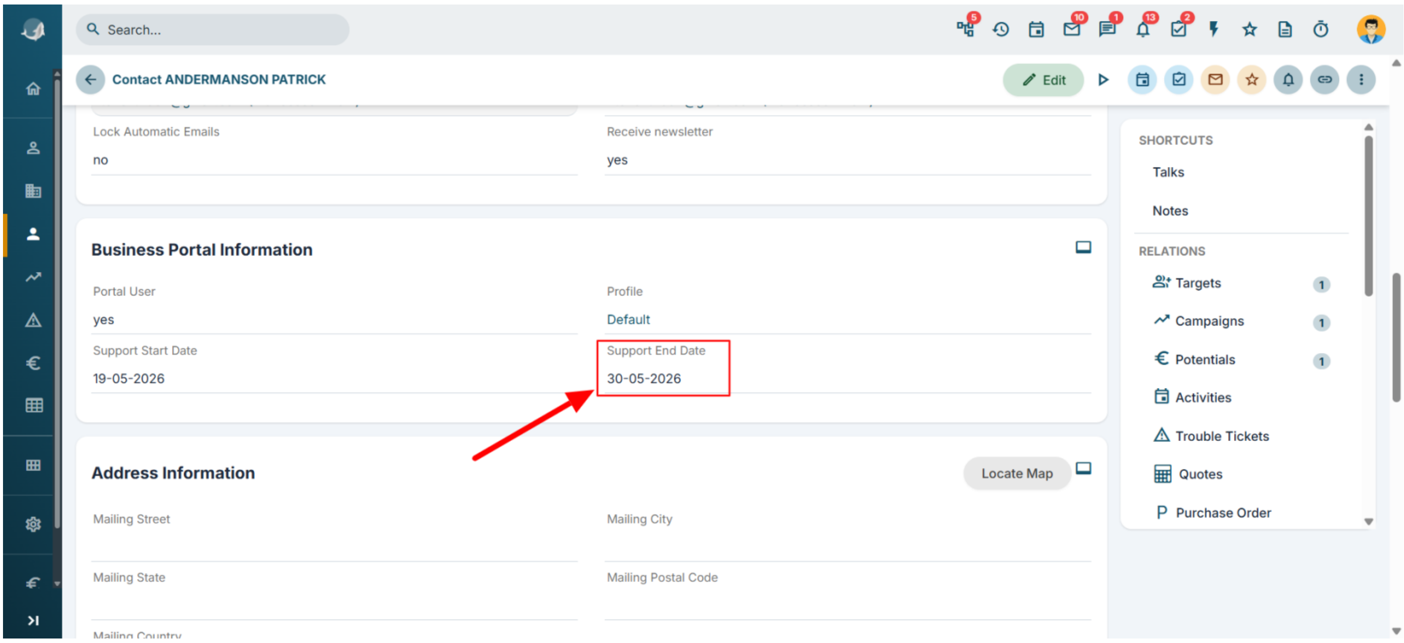
Through the Select user option **(a disabled user can also be chosen)**, it is possible to select a CRM user, also disabled, with a specific configuration of entries for the standard fields. The portal will display precisely those items in the available drop-down menus. When a Ticket is created by the 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.



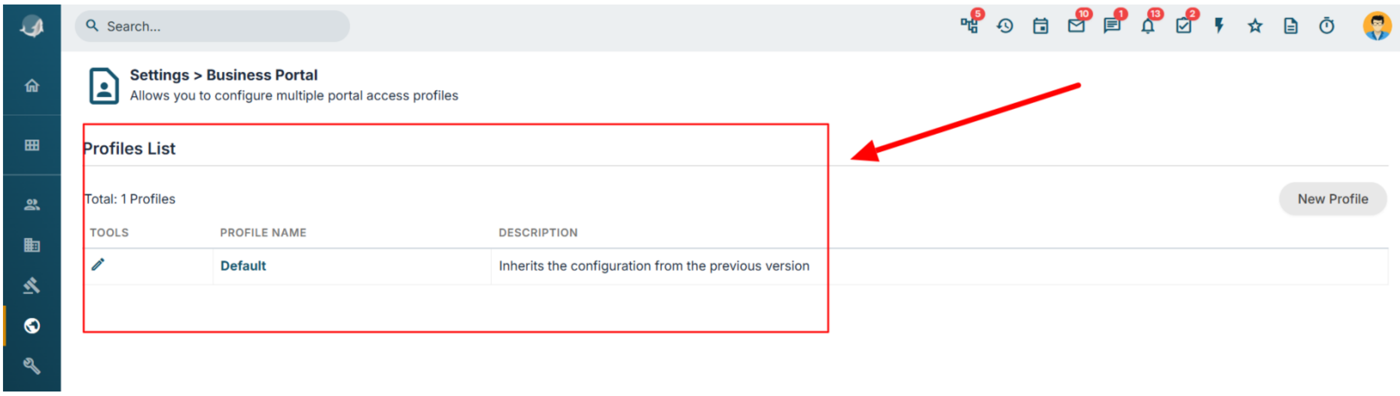
Through the Select the email template option you can decide which email template the system should use to communicate portal access information.

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.

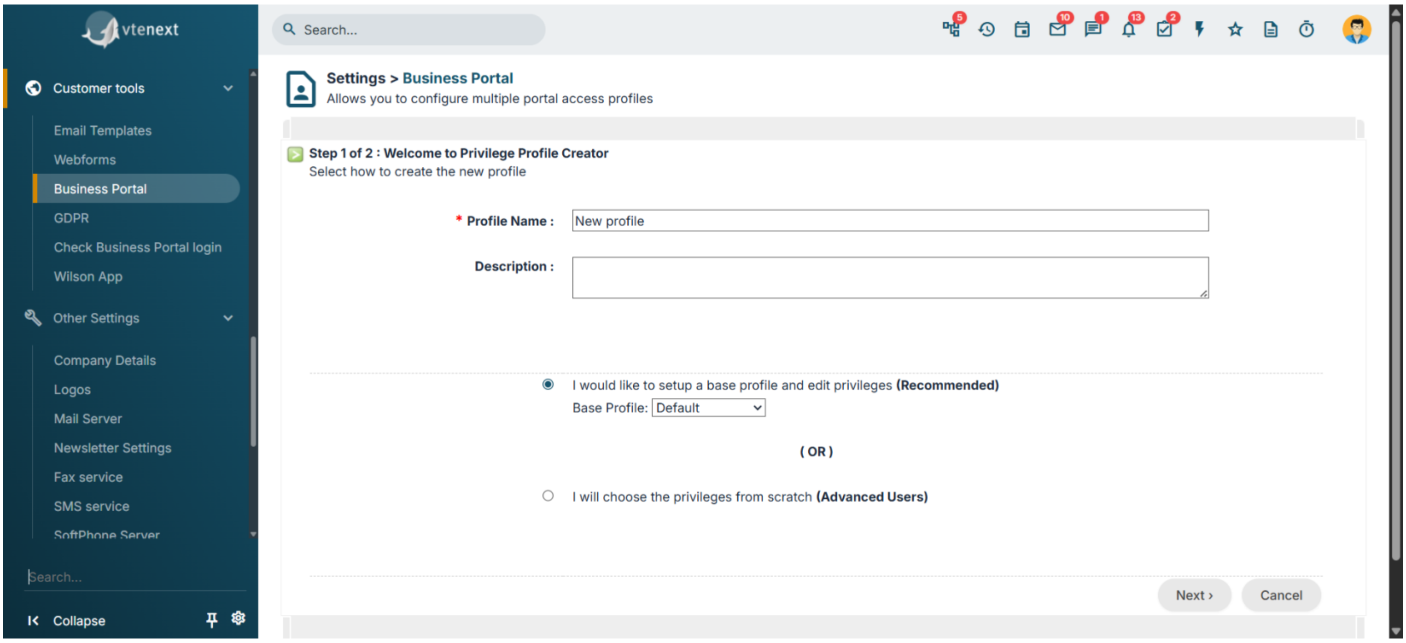


Now let's see how from the Customer Portal Settings, it's possible to create new Profiles **(this feature requires a fee)**. By selecting Version 2 of the Portal (where this option is applicable), the new profiles configuration or management page will appear.



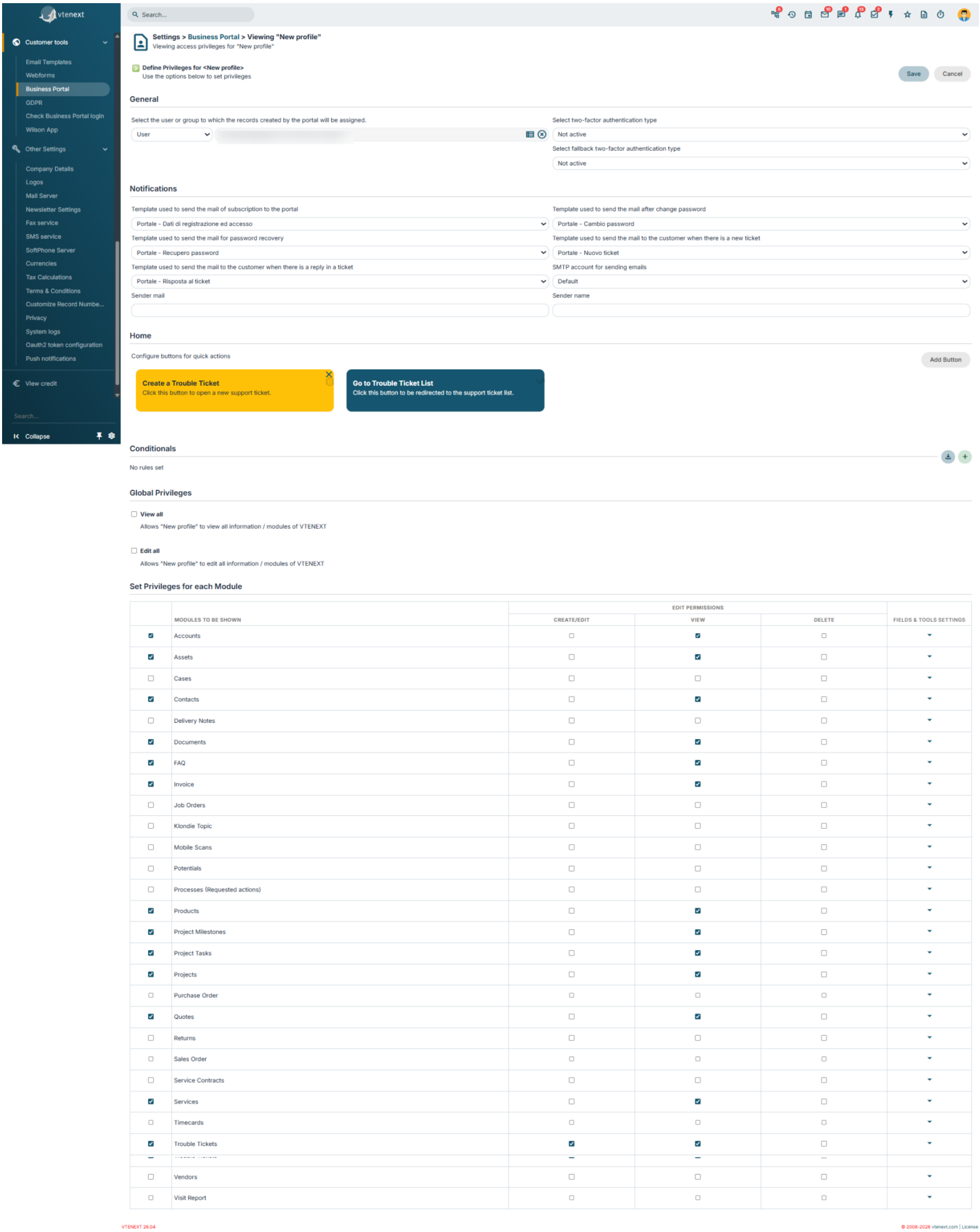
By default, only the profile named **DEFAULT** is available, allowing users to start with a basic configuration. Many modules are deactivated by default in this profile. To activate all the desired modules, it is necessary to upgrade to the Business Portal version (sold separately). Let's see how to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

Click this button to be redirected to the support ticket list.



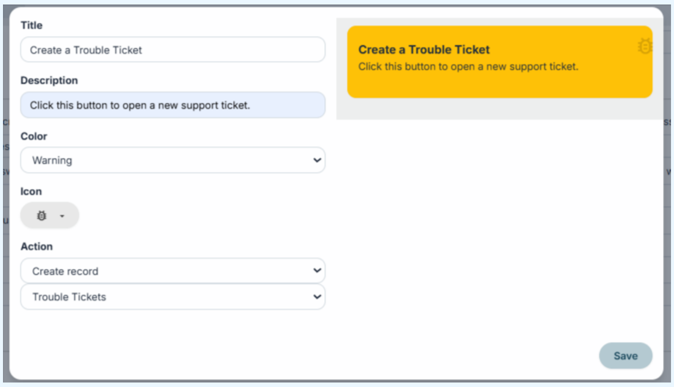
On this page, you can configure several functions, which we'll summarize in the following table:

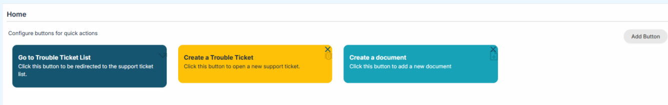
Owner	You can select the CRM user to whom all records created from the portal will be directly assigned;

Notifications	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: • 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; • SMTP account for sending credentials (Default/Global)*****; • Sender mail; • Sender name **Default/Global*** **Default:** If the user has a configured account in the Messages module, the system will use the server associated with it. If no account is configured, the system will use the server specified under Settings -> Mail Server. **Global:** The system will exclusively use the server configured under Settings -> Mail Server.

<table>
<tr>
<td>Home</td>
<td>
It allows configuring buttons for quick actions on the portal home page.
By clicking on ADD BUTTON on the right, you can enable a window from which to set:

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



Button Creation Screen


Button List Viewing Screen

The order of the buttons can be changed through drag-and-drop.
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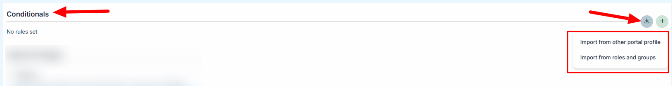
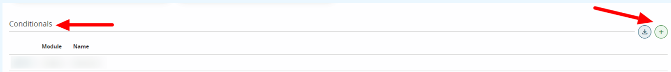
</table>

Conditionals

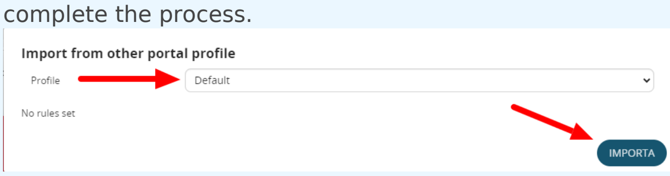
It is possible to set up conditional fields for the Customer Portal, so that they work exactly like in the vte interface. When they are activated, the conditions will function properly on the portal as well. There are three ways to configure them:

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

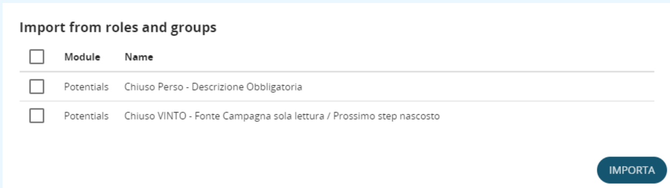




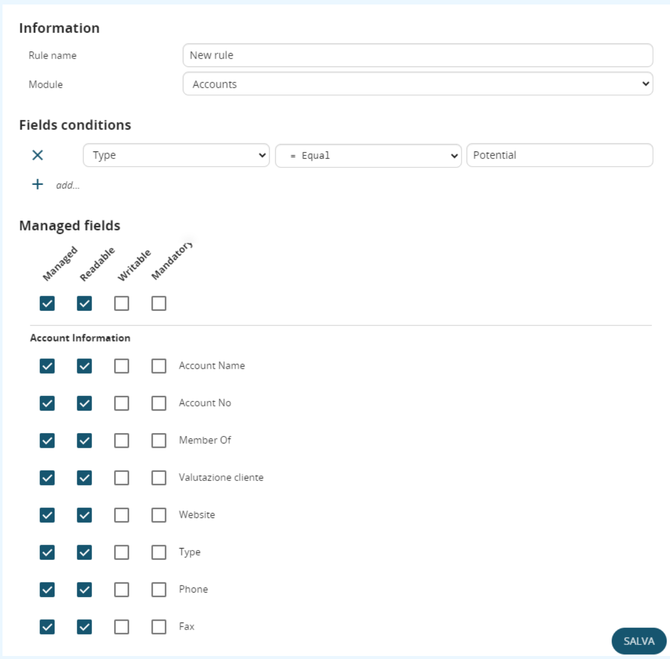
By clicking on **Import from another portal profile**, a popup will open, allowing you to select other existing profiles. Once you've selected the desired profile, you can click **Import** at the bottom right of the window to complete the process.



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*.



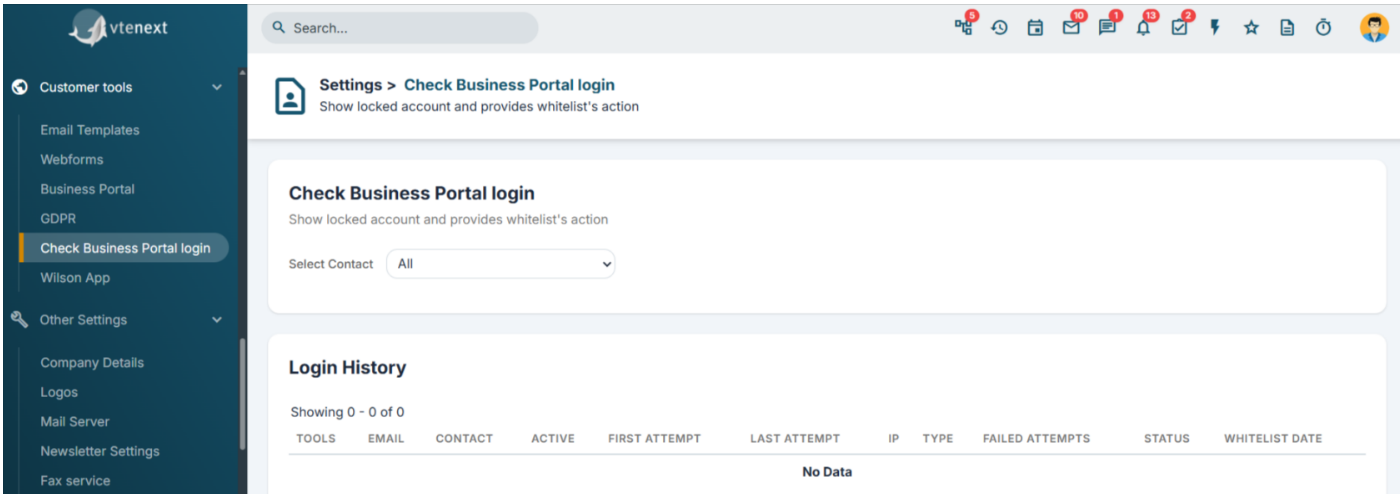
By clicking on **Add**, you can create a new rule for the portal's conditional fields, exclusive to the portal itself (it will not reflect in the CRM). The configuration follows the standard process explained in Chapter 17.4. In the example shown in the image below, you can see a rule where the company's 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. **WARNING:** One particularity to note is that it is not possible to CREATE company records from the Business Portal. Therefore, even if the profile allows enabling the CREATE/EDIT flag, this function is actually disabled. **FIELDS NOT DISPLAYED IN LIST:** a field that is set as not visible to the portal user through profile configuration cannot be added to the list fields. In fact, even if it can be selected during the configuration of the portal list view (for example, for Customer Support Tickets), when saving, that field is automatically removed (due to the profile configuration).
Note on Custom Modules Created via Interface	When creating a **custom module**, in order for it to be added to the list of those supported by the Business Portal—and thus appear in the **portal profile management**—it must have at least one relationship linking it to either the Contacts module or the Companies module. This requirement has been added because permissions in the Business Portal are based on this type of relationship; if such a relationship is not present, the module will not be visible in the portal profile permissions.

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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