



URDHVA TECH

Urdhva Tech Customer Self Service Portal for SugarCRM



This project is in no way affiliated with SugarCRM.

Developed By: Urdhva Tech

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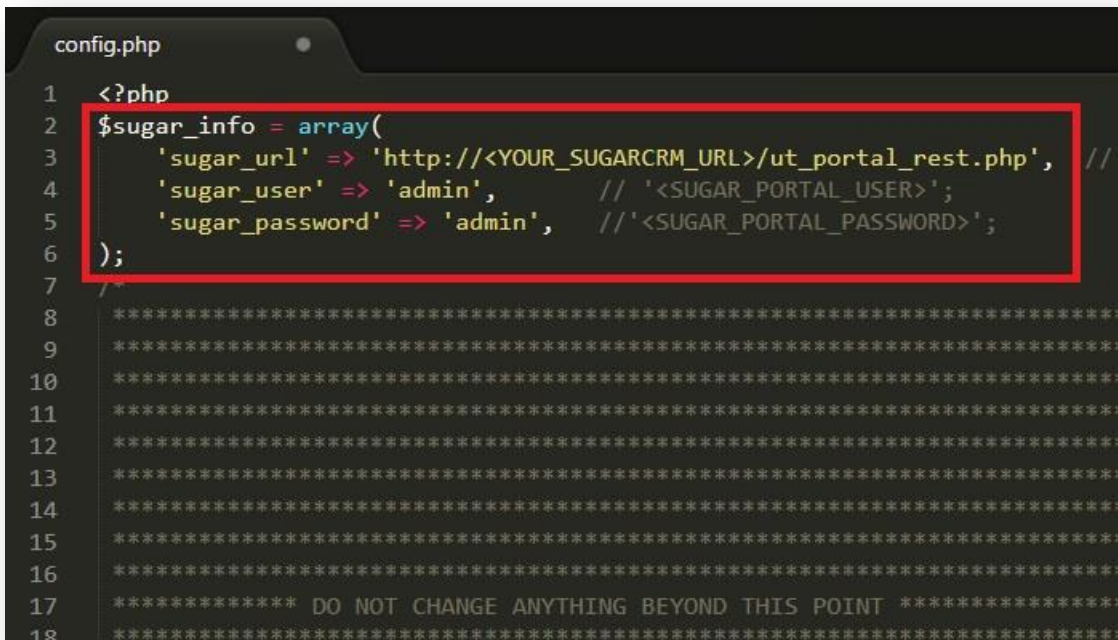
Website: urdhva-tech.com

Administrative guide to configure Customer Self Service Portal

Configuring Portal is a step through wizard and which makes it so easy to configure and manage it every time!

There is just 1 step from Portal, which is, to tell it the SugarCRM location which we will be using.

Locate file config.php on your portal unzipped folder.



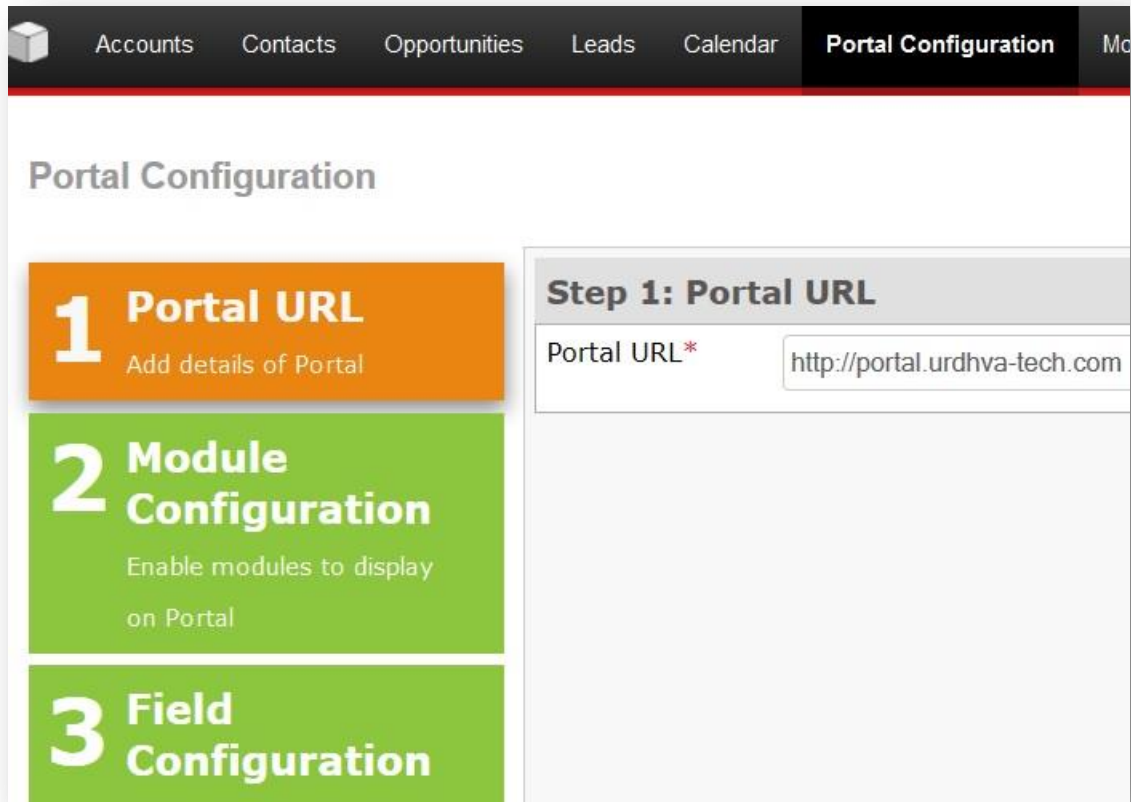
```
config.php
1  <?php
2  $sugar_info = array(
3      'sugar_url' => 'http://<YOUR_SUGARCRM_URL>/ut_portal_rest.php', //
4      'sugar_user' => 'admin', // '<SUGAR_PORTAL_USER>';
5      'sugar_password' => 'admin', // '<SUGAR_PORTAL_PASSWORD>';
6  );
7  /
8  *****
9  *****
10 *****
11 *****
12 *****
13 *****
14 *****
15 *****
16 *****
17 ***** DO NOT CHANGE ANYTHING BEYOND THIS POINT *****
18 *****
```

Change the sugar_url to match with site_url from config.php of your SugarCRM copy. And use sugar_user and sugar_password of an admin user.

Let's now configure Portal from within SugarCRM!

Login as Admin user > Go to Admin > Scroll down to Portal Configuration block and configure license key and up on successful validation Proceed to Wizard.

Step 1: Let SugarCRM know what your portal URL will be, i.e. where you will host your portal. For example, <http://portal.urdhva-tech.com>



The screenshot shows the SugarCRM interface with a navigation bar at the top containing 'Accounts', 'Contacts', 'Opportunities', 'Leads', 'Calendar', and 'Portal Configuration'. The 'Portal Configuration' section is active. On the left, there are three numbered steps: '1 Portal URL' (orange), '2 Module Configuration' (green), and '3 Field Configuration' (green). The main content area is titled 'Step 1: Portal URL' and contains a form with a label 'Portal URL*' and a text input field containing the URL 'http://portal.urdhva-tech.com'.

Step 2: Configure how many modules you want to grant access to, to your customers. For now, portal supports basic SugarCRM modules, like, Contacts (Just customer's own profile), Leads, Cases, Bugs, Newsletters (Customers manage subscription on their own). If you wish to give away access to any custom module, contact us [here](#)

The screenshot displays the 'Portal Configuration' interface. On the left, there are four vertical steps: 1. Portal URL (Add details of Portal), 2. Module Configuration (Enable modules to display on Portal), 3. Field Configuration (Enable fields to Display on Portal), and 4. Update/Repair Portal Layout (Update module/field layout configuration). The main area is titled 'Step 2: Portal Configuration' and shows a 'Saved!' confirmation with a green checkmark. Below this, there are two columns: 'Modules' and 'Modules to Display in'. The 'Modules' column contains 'Calls' and 'Meetings'. The 'Modules to Display in' column contains 'Cases', 'Bug Tracker', 'Leads', 'Notes', 'Newsletters', and 'Contacts'.

P.S. Notes module is found as subpanel under Cases and Bugs module. Customer can request a Call/Meeting for assistance.

Step 3: Hide the fields you don't want your customers to see. Here you can restrict the permission of editing and deleting a record too! You have 2 views to deal with, Edit/Detail and List view, by default; we use what you already have in those views in SugarCRM.

Step 3: Field Layout

Select Module: Cases Select a module to configure fields

Edit/Detail Fields

System ID
Work Log

Column 1

Number:
Status:
Subject:
Resolution:

Column 2

Priority:
Type
Description:

Step 3: Field Layout

Select Module: Cases Select a module to configure fields

List View Fields

Description:
Type
Resolution:
System ID
Work Log
Show in Portal

Column 1

Number:
Subject:
Priority:
Status:

Step 3: Field Layout

Select Module: Select a module to configure fields

Grant access

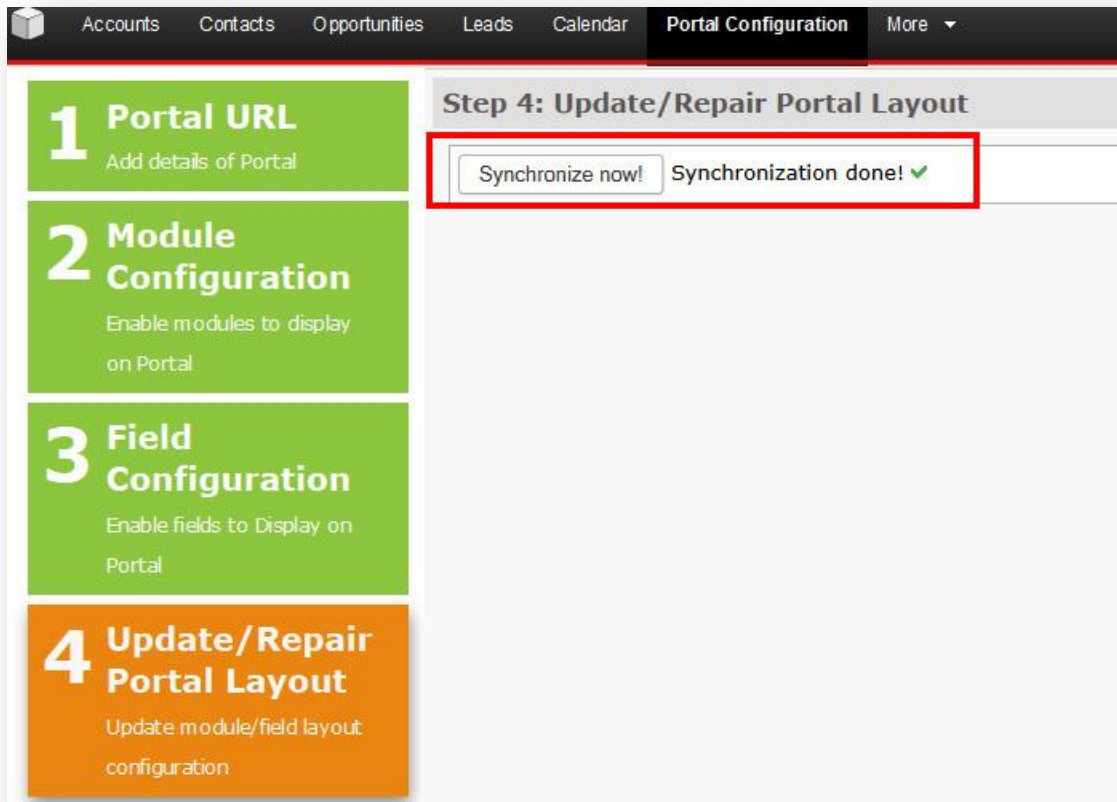
- Edit
- Delete

After all layout changes for a module, you must click on Save Layout button.

P.S. Supported field types, i.e., name, varchar, phone, bool, enum, multienum, text, date, datetime, datetimetype, int.

Note: If you want to allow your customers to reset their password on their own, make sure the field "Portal Password" is available in Edit View in portal.

Step 4: Whatever you have configured in previous steps, let's push to Portal! Click and wait until done!



Note: If you have any problem in synchronizing, first check config.php of Portal package, it must match with SugarCRM site_url. Secondly check the Portal URL you provided in wizard step 1.

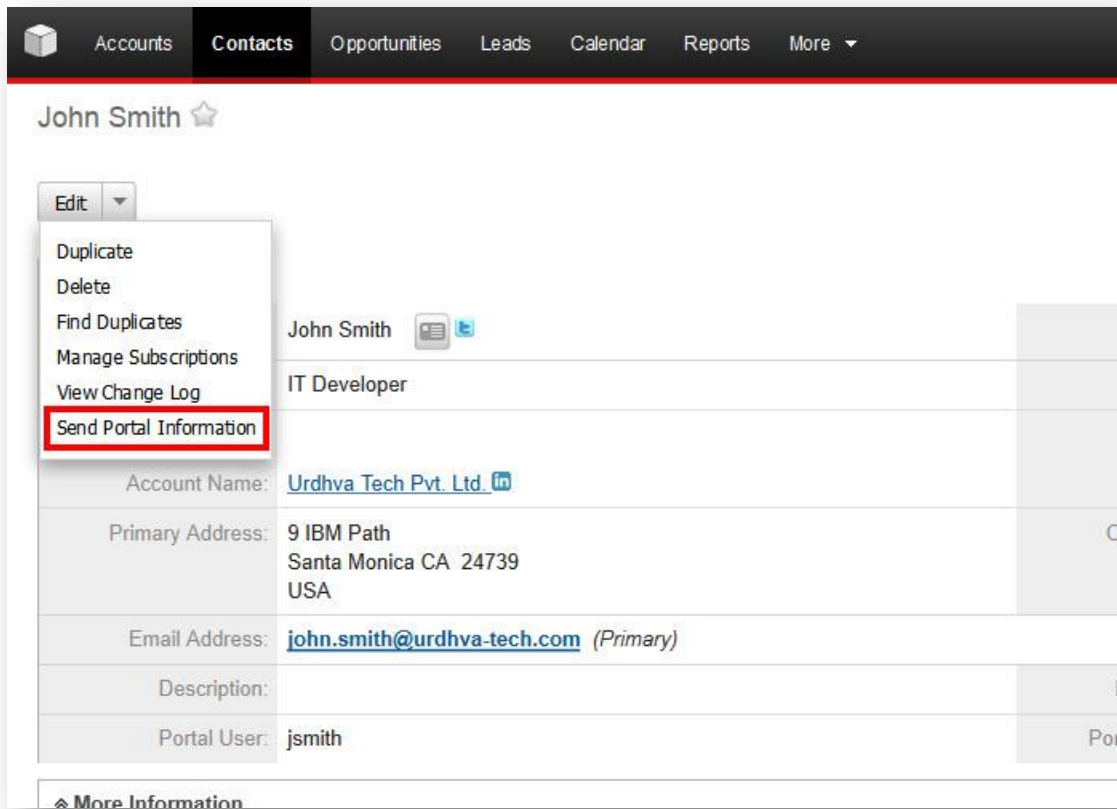
Portal setup is almost done! The views at least!

Let us now give access to customer!

Go to a contact; find new fields, Portal Enable, Portal User and Portal Password. Have Portal enabled check, give a portal name and system will check for its existence, and let you know if it's available, and give password.

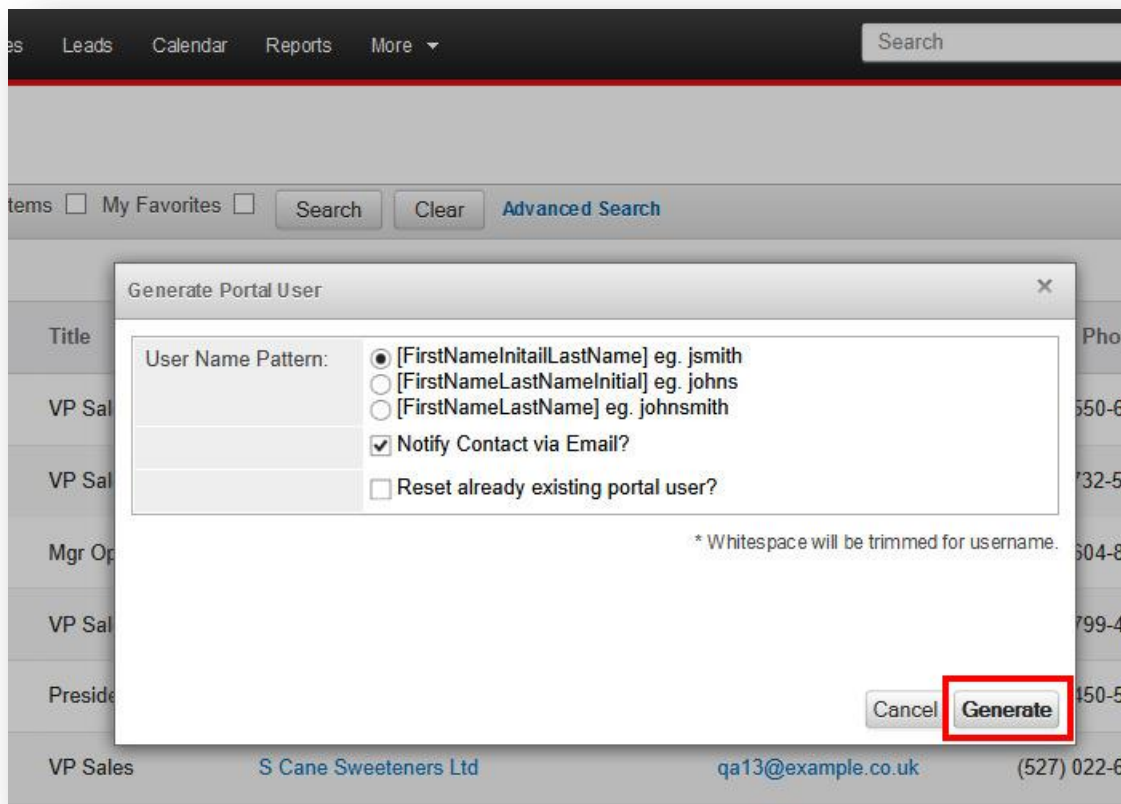
The image shows a screenshot of a CRM application interface. At the top, there is a navigation bar with tabs for Accounts, Contacts, Opportunities, Leads, Calendar, Reports, and More. A search bar is located on the right side of the navigation bar. Below the navigation bar, there are three buttons: Save, Cancel, and View Change Log. The main content area is divided into sections. The first section is titled "Overview" and contains several input fields: First Name (John), Last Name (Smith), Title (IT Developer), Department, Account Name (Max Holdings Ltd), and Description. To the right of these fields are fields for Picture, Office Phone, Mobile, and Fax. Below the Overview section, there are three fields highlighted with red boxes: Portal Enable (checked), Portal User (jsmith) with a green checkmark and the text "This Username Is Available", and Portal Password. Below these fields is a section titled "More Information".

Send them the credentials right from Detail View. Click on “Send Portal Details” button and system sends an email to customer with predefined email template.



This method is tedious, isn't it? Hah, we have a functionality to ease things for you!

Mass assignment of Portal Users: Go to Contact's list view, select contacts, or customers as we see it, to whom you want to give access for portal, select "Generate Portal User".



This will ask you few things like,

- ✓ Username pattern, for example for contact having first name = John and last name = Smith
 1. First name initial last name, that makes jsmith
 2. First name last name initial, that makes johns
 3. First name last name, that makes johnsmith
- ✓ Checkbox for confirmation on sending notification to customer on successful creation of portal information. (Impressive, yeah!)
- ✓ Checkbox to reset username and password for customers who already have a username.

Pretty cool, isn't it?

Note: If you choose to use initials, there must exist a corresponding name, else system will not create username for that customer.

We have installed 2 email templates, one for Portal Forgot Password facility and one for sending out Portal access information to customer. You may change those templates from Emails > Email Templates.

If you have suggestions on making it simpler than what it is, feel free to write to us!