Sugar Ultimate 6.5 Portal User Guide

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Overview

Use Sugar Portal to view, edit, and create records in Sugar Ultimate 6.5.0.

Using Sugar Portal

You can use Sugar Portal to access records in the following Sugar modules:

- Cases: View, create, and edit
- Bug Tracker: View, create, and edit
- Newsletters: Subscribe and unsubscribe
- Knowledge Base: Read articles created in Sugar

Enabling users (for admins only)

Follow the steps listed below to enable Sugar Portal for users:

1. Synchronize Sugar Portal with Sugar as described in To Update Sugar Portal in the Sugar Ultimate Administration Guide.
2. Enable the appropriate Contacts as Portal users in Sugar.
   Contacts can also register themselves with Sugar Portal. Send the login credentials to registered Contacts after you receive their registration information.
   Tasks performed by Contacts after receiving their login credentials are listed below:
   a. Log into Sugar Portal with the username and password that they received.
   b. Enter personal information on the User Settings page to create their Account with Sugar Portal.

Registering with Sugar Portal

1. On the Sugar Portal login page, click the New user? Please register link. This displays the registration page.
2. Enter your name, address, phone number, and other information.
   If you do not want to receive phone calls from the organization, select the Do

Not Call box.
If you do not want to receive emails from the organization, select the Email
Opt Out box.
3. Click Save to forward your registration information to Sugar Portal.

Entering Account information

1. Log into Sugar Portal with your Sugar Portal username and password.
2. On the Sugar Portal Home page, click the My Account link.
3. On the My Account page, enter your name, address, and phone number.
4. Click Save.

Managing Cases

You can view, create, and edit Cases in Sugar Portal. Any Case that you create or
edit is saved on the Sugar server. Log into Sugar to delete a Case.

Creating a Case

1. Log into Sugar Portal and click the Cases tab.
   The Cases page displays a Search sub-panel and a list of existing cases below.
   You can use the Search sub-panel to search for a case using criteria such as
   the case number and status.
2. Click the Create New link at the top of the page or click the Create icon on
   any page within the Cases module.
   This displays the Cases form.
3. Enter information for the following fields:
   Priority. Select the appropriate priority to reflect the urgency of the case.
   Subject. Enter the subject of the case.
   Description. Describe the issue.
4. Click Save.
   The Case is assigned to the user assigned to the Contact.
   When you save a case, the system displays its Detail View. You can attach a
   note or a file from this page as described in [Attaching a Note or a file](#).

Viewing and editing an existing Case

1. On the Cases page, select the Subject of the Case you want to view.
2. To edit the Case, click Edit and make the necessary changes.
   This displays the Case Detail View page.

3. Click Save.

Attaching a Note or file

1. On the Case Detail View page, click Attach Note.
   This displays the fields to add a Note.
2. Enter information for the following fields:
   Subject. Enter the subject of the note.
   Description. Enter the text of the note.
3. To attach a file, click Browse, navigate to the file location, and select it.
   The note is listed on the Detail View page of the Case.
4. To edit the note, click on noteâ s subject on the detail page and then click Edit

Managing Bugs

You can view, create, and edit Bugs in Sugar Portal. Any bug that you create or edit is saved on the Sugar server. Log into Sugar to delete the Bug record.

Creating a Bug

1. Log into Sugar Portal and select the Bug Tracker tab.
   The Bug Tracker Home page displays the Search sub-panel and existing bugs. You can use the Search sub-panel to search for a bug using criteria such as the bug number and status.
2. Click the Create New link.
   This displays the Bug Tracker form.
3. Enter information for the following fields:
   Priority. Select the priority from the drop-down list.
   Status. Select the bugâ s status from the drop-down list.
   Source. Select the source that reported the bug from the drop-down list.
   Category. Select the module to which the bug is related from the drop-down list.
   Subject. Enter the subject of the bug.
   Description. Describe the problem.
   Work Log. This is the field where the user who is assigned to the bug enters a description of the action taken to fix the bug.
4. Click Save.
   This assigns the bug to the user who is assigned to the Contact.
   When you save a bug, the system displays its Detail View. You can attach a note or a file from this page as described in Attaching a Note or a file.

Viewing or editing an existing Bug

1. On the Bug Tracker page, select the bug that you want to view.
   This displays the Bug's Detail View page.
2. To edit the bug, click Edit and make the necessary changes.
3. Click Save.

Managing Newsletter Subscriptions

Newsletters that are created in Sugar display in Sugar Portal. You can subscribe to and unsubscribe from newsletters through Sugar Portal. Any newsletters that you subscribe to will be emailed to you.

Follow the steps listed below to manage newsletter subscriptions:

1. On the Sugar Portal Home page, select the Newsletters tab.
   This displays a list of your current newsletter subscriptions and available newsletters.
2. To subscribe to a newsletter, select the box next to it and click Save. To select all the listed newsletters, click Check All.
3. To unsubscribe from a newsletter, deselect the box next to it and click Save. To deselect all selected newsletter, click Uncheck All.

Viewing Knowledge Base Articles

You can view Knowledge Base articles that are created in Sugar. An article can be on any subject such as case resolutions or FAQs (Frequently Asked Questions).

The articles are grouped into two categories in Sugar Portal: Most Viewed Articles

If the article you want is not listed on the page, you can perform a full text search or a title search to find it. In a full text search, you can use any word that appears in the text of the article.

Viewing Articles and FAQs

FAQs are articles created in Sugar in response to frequent questions that an organization receives from its customers. The FAQs are listed on a separate tab but you can search for an FAQ on the Knowledge Base tab.

The screenshot below displays individual FAQs in various FAQ categories. The Sugar administrator creates the FAQ categories.

Follow the steps listed below to view an article or an FAQ:

1. Click the article in the List View page.
   Attachments such as files and images, if any, are listed at the bottom of the article. To view or download an attachment to your local machine, click its name, select the appropriate option, and click OK.
2. To search for an article by its title, enter its name in the Document Name field and click Search.
   To search for an article by one or more words that appear in its contents, enter the keywords in the Keywords field and click Search. Use spaces to separate keywords.
   When you specify a keyword, the system performs a full text search of the articleâ s contents for the keyword. You can use keywords to include or exclude articles in the search results.
   Use the following search guidelines:
   - Keywords and phrases are searchable and case-insensitive.
   - Phrases must be enclosed in double quotes. For example, â the whole nine yardsâ .
   - To specify multiple keywords, you can use spaces. Using spaces is similar to using the OR operator. For example, if you search for brown blue, the search results will return articles that contain brown or blue.
   - Using the plus (+) sign will return articles that have both the words. For example, brown +blue will return only articles that contain both the words.
   - To ensure that a word is included in the search, use the plus (+) sign before the word. For example, to find articles on the impact of global warming on polar bears, you can search for â global warmingâ +bears or â global warmingâ +â polar bearsâ .
   - To exclude keywords or phrases, use the minus (-) sign. For example, brown blue -yellow. When you specify a word in the Excluding these words field in Advanced Search, you do not need to use the minus sign.
   - Use wildcard characters % or * to specify a partial word. For example, to find words that begin with super, you can search for super% or super*.

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