
Sugar Enterprise 6.7 Portal Deployment User Guide

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Overview

The Sugar Portal is a powerful tool to allow Sugar users to interact with customers and share information related to multiple modules. The portal allows customers to log in and review information directly from your Sugar instance and perform actions such as submitting cases and bugs, communicating with your employees regarding the cases and bugs, as well as reviewing knowledge base articles. Please note that in order to enable the portal for your instance, the Configure Portal option must be [enabled](#) via Admin > Sugar Portal.

Note: The information allowed and viewable in the portal can be updated and restricted by Sugar users as allowed by team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Teams](#) and [Roles](#) documentation in the Administration guide.

Managing Portal Users

For a customer to be able to access your instance's portal, the customer must first be recorded as a contact in Sugar. The portal login functionality relies on the Contacts module to manage who has access to the portal, as well as the person's login name and password. Access to the portal is granted by clicking the "Portal Active" checkbox on the user's record. Portal users can be created either through a process initiated by the customer from the portal, or by a Sugar user through the module.

Creating Via Portal

When a customer accesses the portal, he or she has the opportunity to sign up for the portal if they do not have a user name or password. The registration process allows the individual the opportunity to provide a first and last name, contact information, and the company where they work. When the customer submits this form, a [lead](#) will be created in your Sugar instance. The lead must be then qualified and [converted to a contact](#). After the lead is converted to a contact, [edit the contact](#) to assign a Portal Name, Portal Password, and check the Portal Active checkbox. After this process is complete, the portal user will be able to log in.

Creating Via Contacts Module

Sugar users can create portal users by populating specific fields in the Contacts

module. The three [fields](#) in the contacts module that need to be populated to grant portal access are Portal Name, Portal Password, and Portal Active. Portal Active is a checkbox that needs to be checked to let the portal user log in, and the Portal Name must be unique to any other portal names in the instance. To [edit](#) or [create](#) a contact, please review the Contacts documentation.

Please note that you will only be able to see and edit contact records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Teams](#) and [Roles](#) documentation in the Administration guide.

Editing Portal Users

Details about a portal user can be edited through the [Contacts edit view](#) on the "Portal Information" panel. The panel contains the Portal Name, Portal Password, and Portal Active fields. These fields can be updated to disallow access to the user, change the user name, or update the user's password.

The screenshot shows a form titled "Portal Information" with a small upward-pointing arrow icon to its left. The form contains four fields: "Portal Name:" with a text input field containing "jkelly"; "Portal Password:" with a password input field showing a series of dots; "Confirm Portal Password:" with another password input field showing a series of dots; and "Portal Active:" with a checked checkbox.

Please note that you will only be able to edit contact records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Teams](#) and [Roles](#) documentation in the Administration guide.

In addition, registered portal users are able to update their contact information through the portal in their user profile. Any updates to the user profile made by the portal user will be reflected in Sugar. This way, customers can be responsible to keep their contact information up to date and update any changes as need be. The portal users can also update passwords as needed.

Managing Cases

The Sugar Portal allows customers to create and track their open cases and communicate with the assigned support representative. [Contacts](#) are able to view that are associated to their [account](#), meaning that both the contact and case need to be associated to the same account for the case to show on the contact's portal. In addition, the Show in Portal checkbox must be checked on the case record.

Overview			
Case Number:	57	Priority:	Medium
Status:	Closed	Account Name:	SugarCRM
Type:	Administration		
Subject:	Warning message when using the wrong browser		
Description:	Users need to be migrated to new browser.		
Resolution:	Chrome installed on user's machines.		
Show in Portal:	<input checked="" type="checkbox"/>		

Portal users will be able to review the details of their cases, such as the status and any updates. In addition, portal users will be able to view notes that the assigned support representative has added to the case. For more information on notes added to cases, please see [Adding Notes And Attachments To Cases](#). In Addition, portal users have the option to add notes to the case, which will appear in the [history subpanel of the case](#). Using notes, the support representative can engage in a collaborative conversation with the portal user regarding the progress of the case and any troubleshooting needs.

Adding Notes And Attachments To Cases

In the Cases module's History subpanel, Sugar users have the ability to add notes to the case. Notes include a "Display in Portal" field. When this is checked, the note will appear in the case's note section when the portal user reviews the case. The portal user will be able to see the Subject, Note, Date Created, Created By, and the note's file attachment, if applicable. The attachment can be downloaded to the portal user's computer. Please note that an administrator via the [System](#) section of the Admin menu can control the maximum size of the attachment.

In addition, please note that you will only be able to add notes as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Teams](#) and [Roles](#) documentation in the Administration guide.

Managing Bugs

The Sugar Portal allows customers to submit bugs to your company, track any bugs to receive details on the progress that your company has made on fixing the bug, and communicate with the assigned engineer of the bug. All [bugs](#) can be seen by users, regardless of any account membership. The only requirement for the bug to show in the portal is that the Show in Portal checkbox be checked on the bug record.

Number:	12	Priority:	Medium
Subject:	Syntax error appears when running old reports	Status:	Closed
Type:	Defect	Source:	Forum
Category:	Dashboard	Resolution:	Accepted
Found in Release:	1.0	Fixed in Release:	1.1
Description:	See main dashboard for syntax error with regards to the report section		
Work Log:	Corrupted reports removed		
Show in Portal:	<input checked="" type="checkbox"/>		

Portal users will be able to review the details of bugs, such as the status and any updates. In addition, portal users will be able to view notes that the assigned engineer has added to the bug. For more information on bugs added to cases, please see [Adding Notes And Attachments To Bugs](#). In Addition, portal users have the option to add notes to the bug which will appear in the [history subpanel of the bug](#). Using notes, the engineer can engage in a collaborative conversation with all portal users regarding the progress of the bug and any fix information.

Adding Notes And Attachments To Bugs

In the Bug Tracker's [History subpanel](#), Sugar users have the ability to add notes to the bug. Notes include a Display in Portal field. When this is checked, the note will appear in the bug's note section when the portal user reviews the case. The portal user will be able to see the Subject, Note, Date Created, Created By, and the note's file attachment, if applicable. The attachment can be downloaded to the portal user's computer. Please note that an administrator via the [System](#) section of the Admin menu can control the maximum size of the attachment.

In addition, please note that you will only be able to add notes as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Teams](#) and [Roles](#) documentation in the Administration guide.

Managing Knowledge Base

The Sugar Portal allows customers to review your company's Knowledge Base. Portal users, based on three requirements, can see [Knowledge Base](#) articles. The requirements for the article to show in the portal are:

1. External Article : This checkbox is checked
2. Status : This dropdown field is set to "Published"

3. Expiration Date : This value is set to the current day or in the future

Title:	Connecting to the Internet	⌵ Hide Details
Author:	Will Westin	
External Article? :	<input checked="" type="checkbox"/>	Status: Published
Team:	Global	Approver: Administrator
Publish Date:	05/09/2013	Revision: 1
Expiration Date:	12/31/2015	
Date Created	04/02/2013 10:47am	
Body:	To connect your device to the Internet, use any application that accesses the Internet. Wi-Fi or Bluetooth.	

Portal users will be able to review these articles for assistance in working through common issues. They will see the Body of the article presented with all HTML styling that is shown in the article's [detail view](#).

Last Modified: 09/26/2015 06:25pm