
Sugar Sell 11.3 Portal Deployment User Guide

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Overview

The Sugar Portal is a powerful tool that allows Sugar users to share published knowledge base articles with customers and interact with them via notes. Please note that administrators have the ability to configure the look and feel of the portal, the module layouts, etc. via Admin > Sugar Portal. For more information on the configuration options available, refer to the [Sugar Portal](#) documentation. The portal allows customers to log in and view published knowledge base articles, which can cover a variety of topics such as common troubleshooting tips, frequently asked questions, etc. Please note that in order to activate the portal for your instance, the Enable Portal option must be [enabled](#) by the administrator via Admin > Sugar Portal. Enabling the Sugar portal will create a Customer Self-Service Portal Role and enable a Portal API user in Admin > User Management which must be left enabled in order for portal users to authenticate.

Note: The information 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, refer to the [Team Management](#) and [Role Management](#) documentation.

Managing Portal Users

In order for customers to be able to access your instance's portal, they have to be registered users of the portal. When a potential portal user visits the portal login page and completes the registration form, their information is entered into Sugar as a new contact record. Once the contact record is validated and approved for portal access, you can enable the Portal Active checkbox to activate their portal account. In addition to the portal registration process, a Sugar user can also manually create portal users by populating some key portal fields (e.g., Portal Name, Password) in the contact's record view.

If a portal user has forgotten their password, they can use the Forgot Password link on the login page to reset their password, but note that this feature is only available if [outbound email](#) is configured in your Sugar instance. Contact an admin to confirm if this has been set up.

The following sections cover the basics of how portal users are created, how their portal account can be enabled, and how to edit their profile information.

Creating via Portal

If a customer would like access to the portal and an admin has [enabled the Sign Up link](#) on the login page, they can sign up for a portal account via the portal login page. They will need to complete the portal registration form by providing key information such as their name, email address, company name, etc. For more information on the portal sign-up process for customers, refer to the [Portal User Guide](#). Once the customer submits the portal activation request, a new [contact](#) record will be created in your instance and a Sugar user will need to review and approve their request before they can access the portal. The company name that the customer provides on the portal registration form will automatically populate the [Portal User Company Name](#) field in the contact's record and you will need to relate the appropriate account record to the contact via the Account Name field. In order to activate the contact's portal account, simply enable the Portal Active checkbox then notify the portal user that their account is ready to access.

Creating via Contacts Module

Sugar users can also manually create portal users by populating three specific fields (i.e., Portal Name, Password, Portal Active) in the Contacts module. Please note that the portal password must conform with your system's configured password requirements. For more information on configuring password requirements, refer to the [Password Management](#) documentation. In addition, the user's portal name must be unique to any other existing portal names in the instance. For more information on editing a Sugar record, refer to the [User Interface](#) documentation. In order to activate the user's portal account, enable the Portal Active checkbox.

The screenshot shows a contact record for Jane Smith in the Sugar CRM. At the top, there is a header with a green circle containing 'Co', the name 'Jane Smith', a star icon, and 'Cancel' and 'Save' buttons. Below the header, the record details are displayed in a grid-like format:

- Lead Source: (empty)
- Assigned to: Max Jensen
- Campaign: (empty)
- Language Preference: English (US)
- Portal User Company Name: (empty)
- Portal Name: (empty text box, highlighted with a red border)
- Portal Active: (checkbox, highlighted with a red border)
- Password: (empty text box)
- Date Modified: 2019-10-04 11:39 by Administrator
- New Password: (empty text box, highlighted with a red border)
- Confirm Password: (empty text box, highlighted with a red border)

Please note that you will only be able to view and edit contact records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, refer to the [Team Management](#) and [Role Management](#) documentation.

Editing Portal Users

Registered portal users have the ability to update their contact information as well as their portal password via the User Profile section of the portal. This allows portal users to keep their contact information up-to-date and any changes made to the user's profile in the portal will be reflected in their contact record in Sugar. Sugar users also have the ability to edit and manage the portal user's information via the corresponding contact's record view. For more information on editing records in Sugar, refer to the [User Interface](#) documentation. In addition to the contact's basic profile information, you can change the user's portal name, portal password, or deactivate their portal access by disabling the Portal Active checkbox. Please note that the contact's portal name and password information will be preserved in the system when their portal access is disabled and the portal user will be able to log in with the same credentials if their portal account is activated again at a later time. To change the portal password, simply click the Change password link below the Password field, then enter the new password and confirmed password into the "New Password" and "Confirm Password" fields. Please note that the new password must conform with your system's configured password requirements. For more information on configuring password requirements, refer to the [Password Management](#) documentation.

Portal Name	Portal Active
<input type="text" value="jsmith"/>	<input checked="" type="checkbox"/>
Password	Date Modified
<input type="password" value="....."/>	2019-10-02 08:47 by Administrator
Change password	

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, refer to the [Team Management](#) and [Role Management](#) documentation.

Managing Knowledge Base Articles

The Sugar Portal allows customers to review your company's published [Knowledge Base](#) articles, vote on the [usefulness](#) of the article, as well as provide any feedback or ask any questions related to the article via [notes](#). The Knowledge Base can be a

valuable resource to customers as it can help provide answers to some frequently asked questions, troubleshooting tips to some common issues, etc. Please note that knowledge base articles can be seen by all portal users, regardless of any account membership. In order for an article to be visible in the portal, the article must meet the following requirements:

- **External Article:** Field must be checked.
- **Expiration Date:** Expiration date must be in the future.
- **Status:** Status must be set to "Published".

KB Resetting the device ☆ Published < > Edit ▾

until the dialog box displays. Select the Reset option.

Attachments

Tags

Language	Revision
English	1
Category	Active Revision
Tutorials	<input checked="" type="checkbox"/>
View Count	Teams
5	Global (Primary)
Assigned to	External Article
Will Westin	<input checked="" type="checkbox"/>
Date Modified	Approved By
2019-10-01 14:21	
Publish Date	Related Case
2019-10-01	
Expiration Date	
2019-12-31	

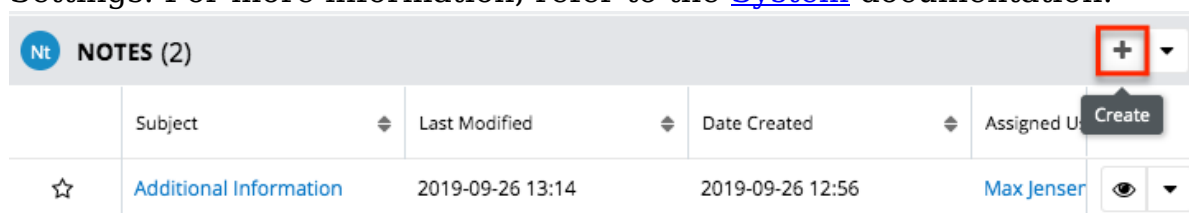
Portal users will be able to view the body of the article which will be presented with all the HTML styling that is shown in the article's record view in Sugar, view any attachments (if applicable), and, if the admin has [enabled notes on the Knowledge Base module](#), create new notes to add any comments or questions related to the article. When a portal user adds a note to the article, it will appear in the Notes subpanel of the Knowledge Base record view in Sugar. For more information on viewing records via related record subpanels, refer to the [User Interface](#) documentation. Please note that Sugar users can also add a note to knowledge base articles if desired and it will be viewable to all portal users via the [knowledge base article](#). For more information on adding notes to articles in Sugar,

refer to the [Adding Notes and Attachments to Knowledge Base Articles](#) section below.

Please note that you will only be able to see knowledge base records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, refer to the [Team Management](#) and [Role Management](#) documentation.

Adding Notes and Attachments to Knowledge Base Articles

If an admin has [enabled notes on the Knowledge Base module](#), portal users have the option to provide any comments or ask questions regarding an article by creating a [note](#) in the knowledge base record. Please note that using notes will capture all communications between the portal user and your company for the particular article and will be viewable by all portal users via the portal. Any notes added to the article by portal users will appear in the Notes subpanel in Sugar's Knowledge Base record. Sugar users can add notes to the article by clicking the Plus button on the upper right of the Notes subpanel in the knowledge base's record view. For more information on creating records via subpanels, refer to the [User Interface](#) documentation. Please keep in mind that notes attached to articles will automatically be visible in the [portal](#) as the Display in Portal checkbox is enabled by default in the note's record view. However, administrators can have this field disabled by default via Admin > Studio if desired. Once created, the note record will appear in the Notes panel of the knowledge base's record view in the portal and the portal user can click the note's subject to view the record details (e.g., description) and download any attachments, if applicable. Please note that there is a 30-second timeout limit for all uploads. Administrators in Sugar can control the maximum file size that is allowed to be uploaded via Admin > System Settings. For more information, refer to the [System](#) documentation.



	Subject	Last Modified	Date Created	Assigned User
☆	Additional Information	2019-09-26 13:14	2019-09-26 12:56	Max Jenser

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, refer to the [Team Management](#) and [Role Management](#) documentation.

Managing Sugar Portal Chat

In Sugar Serve and Sell, if an admin has [configured Sugar Portal Chat](#) in Sugar

and Amazon Web Services (AWS), you can enable a chat window in the portal and customize its appearance to match your organization's branding. Portal users can use this chat window to start chatting, either with a chatbot that you have configured in AWS or directly with your agents in [SugarLive](#).

If an admin has set up the sample chatbot included with Sugar Serve using Amazon Lex, your customers can perform actions within the chat such as check the status of a case or create a new case by speaking to the chatbot as if speaking to an agent. Otherwise, Amazon Connect will route their chat requests to your agents to chat directly with them. When an agent [accepts the chat](#) in SugarLive, the portal user's contact record is automatically opened in the Contact tab and [linked to](#) the message record.

If a portal user communicates with the sample chatbot to create a case, certain fields are set on the case. For example, the Source field is set to "Chatbot", the primary contact is set to the portal user who submitted the case, and the description is set to the text they provided in the chat.

If a portal user has used the chatbot to either check the status of a case or create a new case before asking to speak with an agent, that case record is opened in SugarLive. When an agent [accepts the chat](#), the case is automatically opened in the Case tab and [linked to](#) the message record. If the customer had been working with multiple cases in the chat, the most recent case is used.

To start using Sugar Portal Chat, an admin must complete the configuration described in the [Amazon Web Services](#) page of the Administration Guide, including having a fully configured Amazon Connect instance. Amazon Lex can be set up to use a chatbot at additional cost if desired, and details on this extra configuration are also available in the [Amazon Web Services](#) documentation. See the [Portal User Guide](#) for details on how portal users can interact with the chat window to communicate with a chatbot or a customer service agent.

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