
Sugar Sell 11.3 Portal User Guide

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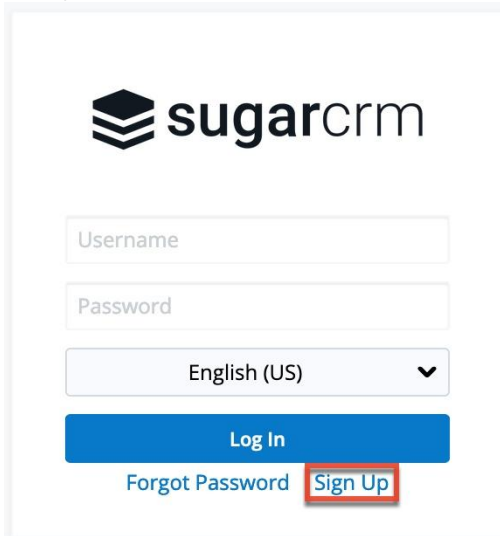
Sugar Sell 11.3 Portal User Guide

Overview

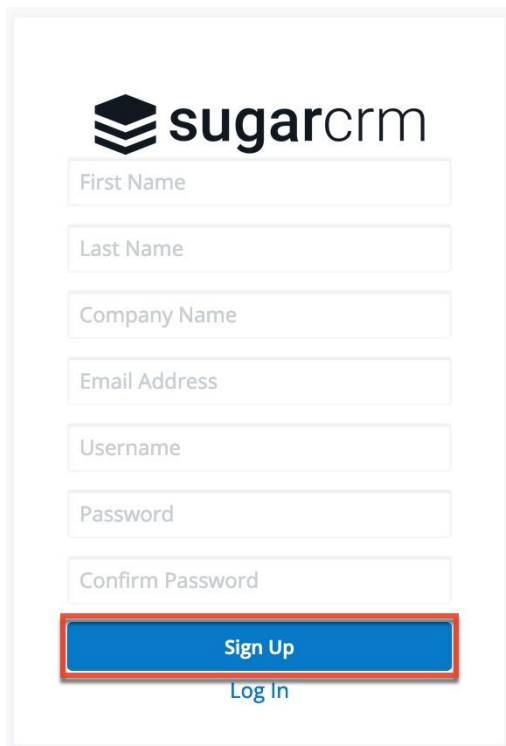
The customer support portal allows you, the end portal user, to access knowledge base articles published by your vendor. You can also view and update your contact information via the portal which allows you to keep your record up-to-date in the vendor's system. Please note that the module, options, and functionality available in the portal may vary depending on your vendor's configuration. This documentation covers the basics of utilizing the support portal as well as how to perform common tasks such as adding notes to records, searching for records, etc.

Signing up for the Support Portal

In order to access the support portal, you can either register using the "Sign Up" link on the portal login page, if available, or ask the vendor to create an account for you. Ask the vendor for the portal login page URL if you do not already have it.



Complete the registration form, including all required fields (e.g., Email Address, Username, Password), then click "Sign Up". Please note that the password you enter must conform with the password requirements configured by your vendor. Once your portal activation request gets submitted to your vendor, a representative in the organization will need to review and approve your request before you can access the portal. Once your portal account has been activated, you will receive an email from the vendor confirming that your account is ready to access.



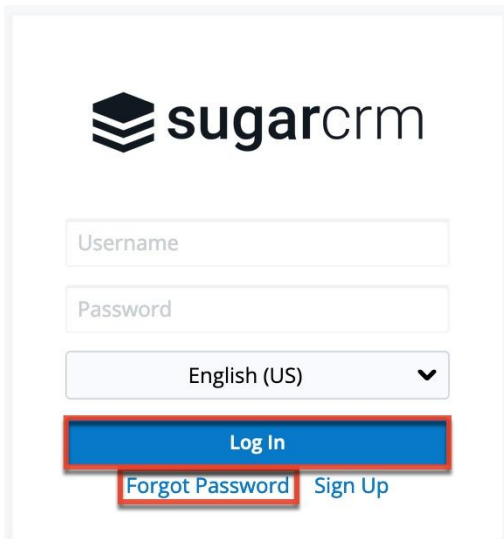
The image shows a registration form for SugarCRM. At the top left is the SugarCRM logo. Below it are seven input fields: First Name, Last Name, Company Name, Email Address, Username, Password, and Confirm Password. At the bottom of the form is a blue button labeled 'Sign Up' with a red border, and a 'Log In' link below it.

Accessing the Support Portal

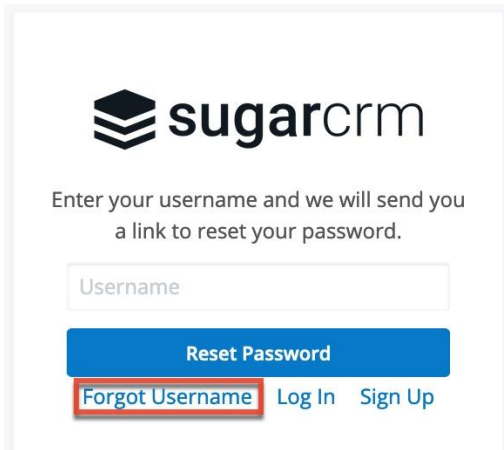
Once your portal account has been activated, you can navigate to the portal's login page using the portal URL previously provided by your vendor. If you do not have an active portal account, you will need to sign up for portal access by following the instructions in the [Signing up for the Support Portal](#) section. The following sections will cover the basics on how to log into the portal, reset your password, etc.

Logging in

The portal login screen is where you will enter the username and password that you entered when registering for the portal account. Once you have entered in your login credentials, click the Log In button to access your portal account. Please note that you will need to have an [active portal account](#) before you can access the portal.



If you do not remember your username or are having difficulty logging into your account click the [Forgot Password](#) link, if displayed, then click "Forgot Username" (if the link is available) in the following screen, which will open up a Contact Info screen containing the vendor's contact information (e.g., phone, email) where you can reach out for further assistance.

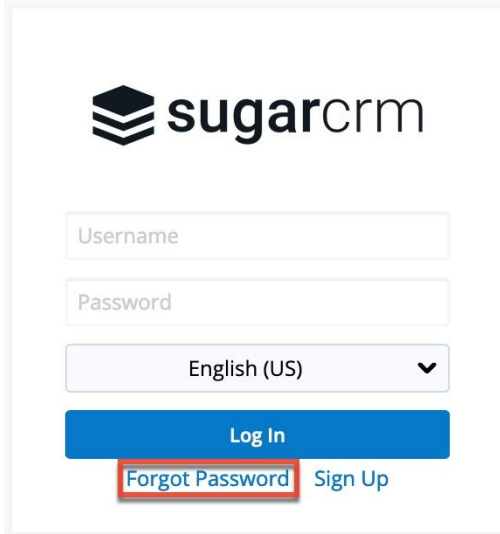


If you have forgotten your password, then you can reset it by clicking the [Forgot Password](#) link, if available, and entering your username in the next screen. For more information on resetting your password, please refer to the [Resetting Your Password](#) section below.

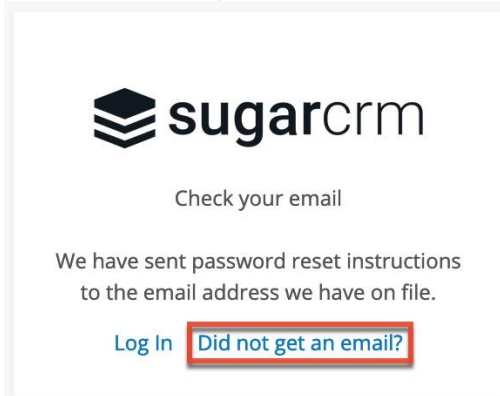
Resetting Your Password

There may be occasions where you forget your password for the portal and will need to reset it. You can request a password reset directly from the portal's login screen by clicking the [Forgot Password](#) link. If you do not see the [Forgot Password](#) link on the login screen, reach out to your vendor for further assistance. Once you

click the Forgot Password link, the Forgot Password screen will open where you can enter your username and click "Reset Password".



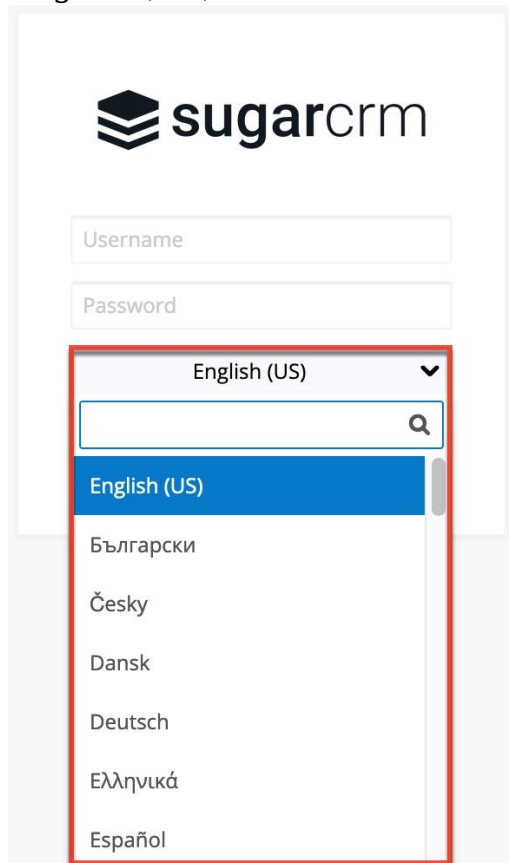
An email containing instructions to reset your password will be sent to the email address the vendor has on file for you. Simply click the link in the email which will open the reset password page where you will enter your new password and confirmed password. Please note that the new password must conform with the password requirements configured by your vendor. If you do not receive an email, you can click the "Did not get an email?" link on the email confirmation screen, which will open up a Contact Info screen containing the vendor's contact information (e.g., phone, email) where you can reach out for further assistance. Please note that you can also click the Forgot Username link on the Forgot Password page to access the same contact information.



Setting Your Language

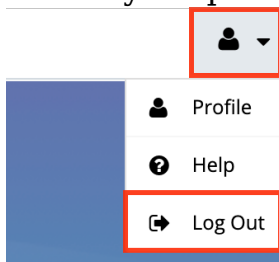
You have the option to choose the primary language you want to be displayed in your portal account by selecting the desired language from the language dropdown list on the portal login screen. Please note that the default language selected is

English (US).



Logging Out

When you are done using the portal and wish to log out of the system, simply click the user profile image on the upper right of the portal and select "Log Out". This will log you out completely from the portal and you must [log in](#) again in order to access your portal account.



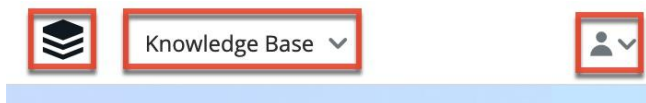
User Interface

Once you are logged into the portal, the portal provides you with a simple, streamlined, and intuitive user interface to access the information you need. Please

note that the [navigation bar](#) displays at the top of each page in the portal for easy access to various modules (e.g., Knowledge Base), access to common actions (e.g., create, view) in the module tabs, etc. Clicking the logo icon on the far left of the navigation bar will return you back to the portal's [Home page](#) dashboard.

Navigation Bar

All pages within the portal display a navigation bar spanning across the top of the screen. The navigation bar allows you to access the Home page dashboard, Knowledge Base module, as well as your user profile.



The navigation bar consists of the following options from left to right:

Navigation Item	Description
Home	Click the company logo icon on the far left of the navigation bar to access the Home page dashboard.
Module Tabs	The Knowledge Base module displays on the navigation bar. Click the module name to open its list view or click the triangle to the right of the module name to display the Actions and Recently Viewed menu.
User Menu	Click the user profile image to display the user menu, which allows access to your profile as well as the Log Out option.

Home

The portal's home page houses the dashboard which contains the Knowledge Base list view dashlet. The dashlet displays a list of knowledge base records belonging to the module and you can view basic details (e.g., name, category) of each record within the field columns of the dashlet or click the record's name to view more details via the record view. The list view dashlet loads an initial number of records and you can click the "More knowledge base articles..." link at the bottom of the dashlet to load the next set of records. Please note that the dashlet's height


increases slightly when loading the next set of matching results. You can manually refresh the dashlet by clicking the Refresh icon to the right of the search box.

Clicking the dashlet's title (Knowledge Base) will direct you to the module's list view. To perform a search in the dashlet, simply enter a search term in the search box and the relevant results will display in the list view below. You can also use the Filter option to narrow your search further using the available options as follows:

Filter Options	Description
All Articles	Returns all knowledge base records in the module.
Recently Created	Returns only articles that have been published within the last 7 days.

Knowledge Base ▾

Knowledge Base

Filter ▾ Build Filter Search by name... 

	Category	Language	Date Created
How to change the language	Help	English	2021-12-27 11:38
How to print	Help	English	2021-12-27 11:38
Charging the battery - revision...	Tutorials	English	2021-12-27 11:38
Verbinden mit dem Internet	Help	Deutsch	2021-12-27 11:38

[More knowledge base articles...](#)

Module Tabs

The Knowledge Base module tab is located to the right of the logo icon on the navigation bar at the top of any portal screen. To access the Knowledge Base module's list view, simply click the module's name (i.e., Knowledge Base). You can also click the triangle to the right of the module's name to display the Actions and Recently Viewed menu. The Actions menu allows you to perform important actions such as "View Articles" while the Recently Viewed menu displays the list of records you last viewed in the Knowledge Base module.

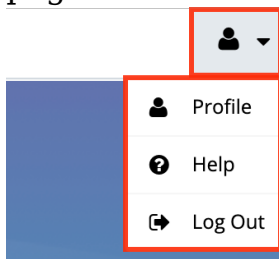


The following operations are available in the module tab's Actions menu:

Menu Item	Description
View Articles	Opens the list view layout to search and display knowledge base articles

User Menu

A profile image icon is displayed in the upper right corner of the portal where the user menu lets you access your profile, view the portal documentation, or log out. Please note that you can upload an image via your user profile to display as your main profile image in the portal. For more information on updating your user profile, please refer to the [User Profile](#) section below. Selecting the Log Out option will log you out of your current user session and direct you back to the main [login](#) page.



User Profile

The User Profile section of the portal displays basic information such as your name, email address, primary address, etc. that the vendor has on file in their system. If any of your contact information changes, please update your profile accordingly so that the vendor has up-to-date contact information. Please note that any changes made to your user profile will automatically be updated in the vendor's database as well.

User Fields

The User Profile contains a number of stock fields from the vendor's database as listed in the table below. Please note that depending on your vendor's configuration, the fields available to complete in the user profile may vary.

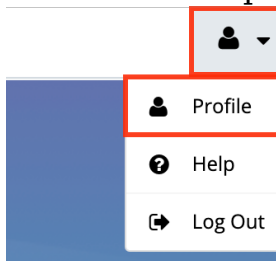
Field	Description
Alternate Address	Your secondary address (e.g., billing or shipping)
Assistant	The name of your assistant
Assistant Phone	The assistant's phone number
Birthdate	Your date of birth
Date Created	The date your contact information was entered into the system
Date Modified	The date your contact information was last modified
Department	The department where you work
Description	A description or other information about you
Do Not Call	Indication that you should not be called
Email Address	Your email address Note: Additional email addresses can be added using the Plus button below your current address.
Fax	Your fax number
First Name	Your first name
Home	Your residence telephone number
Language Preference	Your preferred language when accessing the portal
Last Name	Your last name
Mobile	Your mobile telephone number
Office Phone	Your office telephone number
Other Phone	Your non-primary telephone number
Portal Name	Your username for accessing the portal
Portal Password	Your password for accessing the portal
Primary Address	Your primary mailing address
Salutation	Standard greeting for you (e.g., Mr., Ms., Dr., etc.)
Title	Your job title

Editing User Profile

You can edit your user profile at any time by clicking the user profile image on the upper right of the portal then selecting "Profile". Once you are in the record view, you can edit individual fields without entering the full edit mode by clicking the field name (e.g., Email). Fields that are available for inline editing will display a pencil icon when hovering on the field name or value. If you wish to edit multiple fields at once via the record view, click the Edit button on the upper right of the page. Once the necessary fields have been updated, click "Save" to preserve the changes made.

Use the following steps to edit your user profile:

1. Click the user profile image and select "Profile".



2. Click "Edit" to make changes to your profile information.
3. Enter appropriate values for the [fields](#) you wish to update.
Note: To update your portal password, enter your current password, new password, and your new password again in the Confirm Password field. The new password must conform to the password requirements configured by your vendor.
4. Click "Save" to preserve your profile information.

The image shows a user profile edit form. At the top, there are fields for Salutation (a dropdown menu), First Name (Jill), and Last Name (Demo). To the right are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box. Below these are fields for Title (Supervisor) and Email Address (jill.demouser@grr). To the right of the email field are icons for favorite, delete, info, and a minus sign. Below the email field is an 'Add email' button with a plus icon. The 'Password' section is highlighted with a red box and contains three fields: 'Current Password', 'New Password', and 'Confirm Password'. Below the password fields are fields for Primary Address Street, Primary Address City, Primary Address State (PA), Primary Address Postal Code, Primary Address Country (USA), and Language Preference (English (US)).

If you have updated your password, the new password will take effect the next time you log into the portal.

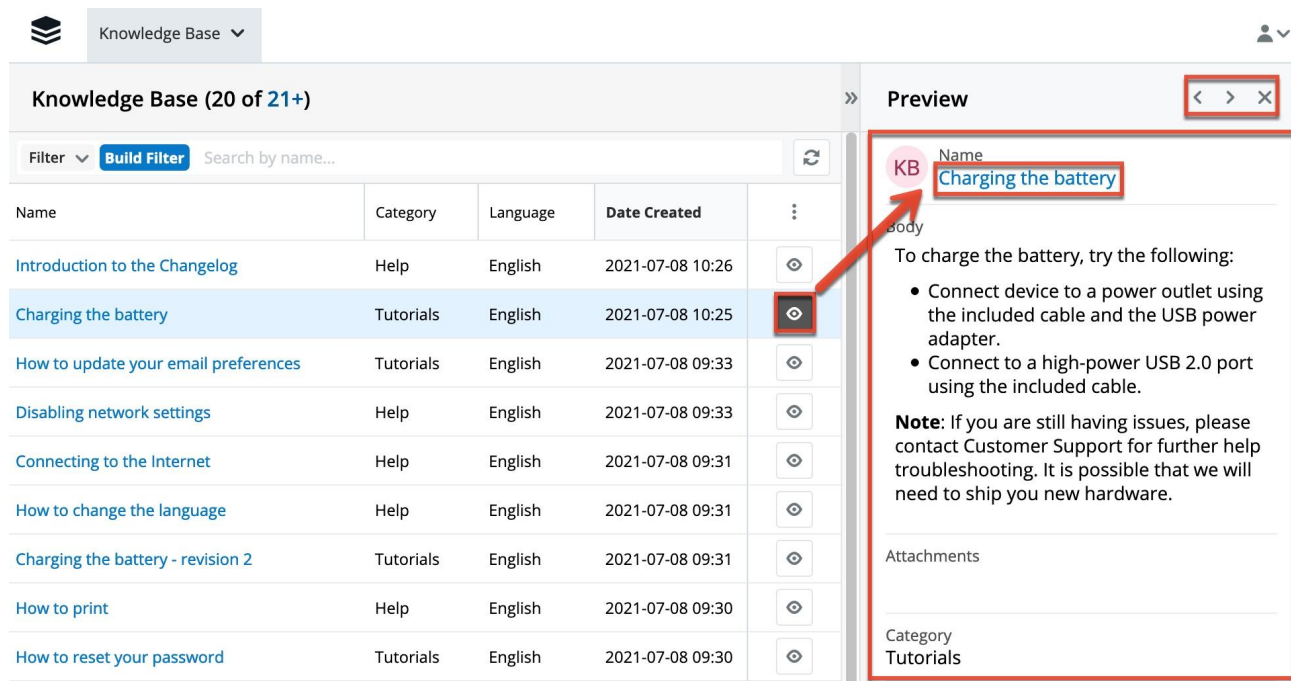
Viewing Records in the Portal

Records can be viewed from a variety of locations in the portal including via the module's list view, record view, dashlets, preview, etc. The most common method of viewing the record is via the module's list view which displays all of the module's records that meet the current search criteria. To access the list view, simply click the desired module tab (e.g., Knowledge Base) in the portal.

While the list view only shows key fields, you can click the record's subject or name to open the record view to access additional details including all relevant fields. Please note that the record view can be reached by clicking a record's subject or name link from anywhere in the portal. As you use the portal, it will keep track of the three records you most recently viewed in the particular module. Simply click the triangle in the module's tab to display the Recently Viewed menu and click the record's subject/name within the list to open it in record view.

Clicking the Preview button (eye icon) to the far right of each record's row in the module's list view allows you to easily view a record's details in the right-hand side pane without leaving the list view. You can also click the record's subject or name to open it in record view. To view all of the fields on the module's record view, click the "Show more..." link below the record's fields. The left and right arrow

buttons at the top of the right-hand side pane allow you to preview the next or previous record of the current list. To close a preview, simply click the "X" to the right of the arrows.



The screenshot shows the Knowledge Base interface. On the left, there is a list of records with columns for Name, Category, Language, and Date Created. The record 'Charging the battery' is highlighted. On the right, a preview pane is open, showing the title 'Charging the battery' and the body text. The preview pane has navigation arrows and a close button (X) at the top right. A red box highlights the preview pane, and a red arrow points to the 'Charging the battery' record in the list.

Name	Category	Language	Date Created
Introduction to the Changelog	Help	English	2021-07-08 10:26
Charging the battery	Tutorials	English	2021-07-08 10:25
How to update your email preferences	Tutorials	English	2021-07-08 09:33
Disabling network settings	Help	English	2021-07-08 09:33
Connecting to the Internet	Help	English	2021-07-08 09:31
How to change the language	Help	English	2021-07-08 09:31
Charging the battery - revision 2	Tutorials	English	2021-07-08 09:31
How to print	Help	English	2021-07-08 09:30
How to reset your password	Tutorials	English	2021-07-08 09:30

Preview

Name
Charging the battery

Body

To charge the battery, try the following:

- Connect device to a power outlet using the included cable and the USB power adapter.
- Connect to a high-power USB 2.0 port using the included cable.

Note: If you are still having issues, please contact Customer Support for further help troubleshooting. It is possible that we will need to ship you new hardware.

Attachments

Category
Tutorials

The dashlets on the home page also allow you to get a quick view of various records in the module and you can view basic details of each record within the field columns of the dashlet or click the record's subject/name to view more details via the record view. For more information on using the dashlets, please refer to the [Home](#) section.

Searching for Records in the Portal

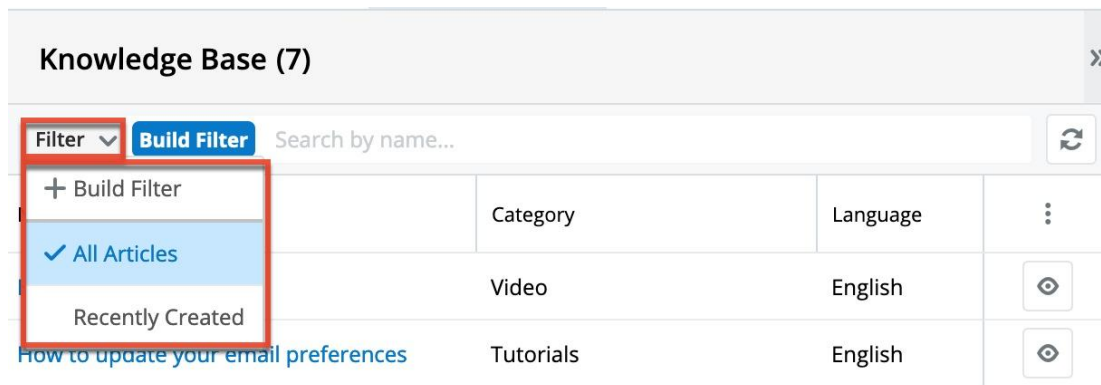
The Knowledge Base module includes a list view search to help you easily locate articles by name. Simply enter a keyword in the search box and the search results will begin appearing in the list view below once you enter at least one character. Please note that the portal automatically appends the wildcard character (%) to the end of your search phrase which will only return records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g., %error).

In addition to the list view search, you can search for articles via the Knowledge Base list view dashlet on the [home page](#) by entering a search term in the search box. The relevant results matching your search will display in the list view below. You can also use the available Filter options to narrow your search further.

List View Search

List view search enables users to easily search by the record's name within an individual module and pull up matching records in the list view. The search also provides a Filter option allowing you to narrow your search further using the available options. The following default filters may be available in each module:

- **Build Filter:** Create a new custom filter that you can use to filter your search
 - **Note:** You can also click "Build Filter" to the right of the Filter option.
- **All "Module Name":** Returns all records you have access to in the module
- **Open "Module Name":** Returns all records in the module with a status that is not closed
- **Recently Created:** Returns only records that were created in the module within the last 7 days
- **Recently Resolved:** Returns only records that were closed within the last 7 days



When you choose a filter, the portal will return records that match both the selected filter and any search query provided in the open Search box in the filtered list view results. For example, if you select "Recently Created" in the Filter options and enter a query in the Search box, Sugar will only return records that have names that match the search term and were created in the last 7 days. Once the search is complete, the relevant results will populate in the [list view](#) below the search bar.

Knowledge Base (2) >>			
Filter ▾ Recently Created ✕ %tr ✕ ↻			
Name	Category	Language	⋮
Understanding Tracker Files	Video	English	🔍
Introduction to the Changelog	Help	English	🔍

Note: The yellow highlighting in this image has been added for effect and will not appear in the application.

When you perform a search using a filter from the filter list, the filter will continue to apply if you navigate away from and then return to the module's list view. Any text query entered in the open Search box, however, will not be preserved.

To see all records to which you have access, simply select the All "Module Name" (e.g., All Articles) option in the filter and remove any text from the search bar:

Knowledge Base (7) >>			
Filter ▾ Build Filter Search by name... ✕ ↻			
+ Build Filter			
Name	Category	Language	⋮
✓ All Articles	Video	English	🔍
Recently Created			
How to update your email preferences	Tutorials	English	🔍

To clear an applied filter, click the "x" on the selected filter option in the Search box; to clear a text query from the search, click the "x" on the right end of the search box:

Filter ▾ Recently Created ✕ %tr ✕ ↻			
-------------------------------------	--	--	--

To update the filtered list view with the most recent results, click on the Refresh icon to the right of the search box:

Filter ▾ Recently Created ✕ %tr ✕ ↻			
-------------------------------------	--	--	--

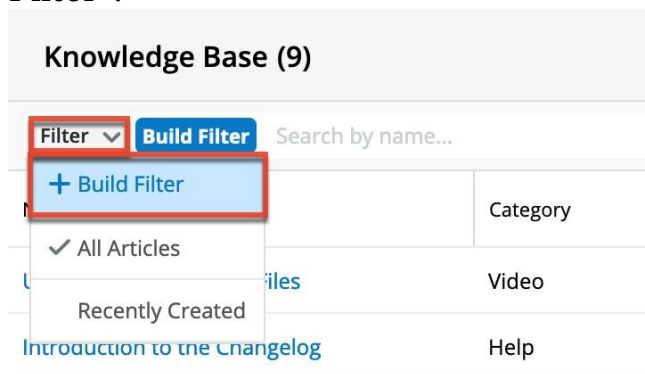
Creating a Filter

Users can also create new filters via the Build Filter option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the module's list view. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists and set select operators along with their value(s). A filter's criteria need to be true for a record in order for it to appear in the list view search result.

When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter.

The following steps cover creating a new Name filter in the Knowledge Base module as an example:

1. Click the Filter option on the Knowledge Base search bar then select "Build Filter".



- You can also click "Build Filter" to the right of the Filter option.
2. Select the Name field to add to your filter as well as the condition and matching criteria.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
 - To remove fields from the new filter, click the Minus button to the right of the filter.
 - To clear any filter values, simply click the "x" to the right of the value or click the "x" in the blue Build Filter button in the search bar to clear them all at once.

Name	Category	Language	
How to create a report	Video	English	

The list view will automatically display results matching your filters as you create and modify the criteria. To view the most recent matching records for an existing filter, click on the Refresh button to the right of the search box.

Understanding List View Search Behavior

When searching for knowledge base articles, the portal automatically appends the wildcard character (%) to the end of your search phrase. This means that the system will retrieve all records that start with the exact keyword or phrase entered in the search box. If you would like to broaden your search results, you can use the wildcard character (%) at the beginning of your search text as well which will pull up any record containing the word regardless of how it starts or ends. So, for example, a search for "troubleshooting" will return any articles that begin with the word "troubleshooting" such as "Troubleshooting users unable to access records"; whereas, a search for "%troubleshooting" will return any knowledge base record that contains the term "troubleshooting" in its name such as "Basic troubleshooting tips for record access issues". Please note that only the article's name can be used to search for articles in the portal. Search will not return results based on the body of the knowledge base article or any other fields in the record.

When combining multiple criteria, such as a search and a filter or two filters, the list view uses the "and" operator. This means that if you are searching against multiple fields in your filter option, the portal will place an "and" in between each search field returning only records matching all (as opposed to any) of your search criteria. For example, if you select "Recently Created" in the Filter options and enter a record name, the portal will only return records with a matching name that were created in the last 7 days.

Module List View

A module's list view displays all records meeting the current search criteria. You can view the basic details of each record within the field columns of the list view or click the record's subject or name to open the [record view](#). To access a module's list view, simply click the module tab (e.g., Knowledge Base) in the navigation bar

at the top of the screen. The module's list view provides the following information and capabilities:

Name	Category	Language	Date Created	
How to update your email preferences	Tutorials	English	2021-07-08 09:33	
Disabling network settings	Help	English	2021-07-08 09:33	
Connecting to the Internet	Help	English	2021-07-08 09:31	
How to change the language	Help	English	2021-07-08 09:31	
Charging the battery - revision 2	Tutorials	English	2021-07-08 09:31	

Module Record View

The module's record view displays thorough information regarding the record including all relevant fields (e.g., subject, name, status). The record view can be accessed by clicking a record's subject or name link from anywhere in the portal including from the module's list view. On the upper right of the record view, there are two buttons that allow you to page through each record in the module's list view's current search results. Clicking the Left arrow button displays the previous record of the current search results while clicking the Right arrow button displays the next record of the current search results. In addition, clicking the double arrow icon to the right of the Left and Right arrow buttons will expand the record view to the full-screen width and hide the preview pane. To reduce the record view's width and reveal the preview pane, simply click the double arrow icon again.

KB

Charging the battery

<
>
»

Knowledge Base Categories & Published Articles

- Documentation
- Tutorials**
 - Charging the battery

Body To charge the battery, try the following:

- Connect device to a power outlet using the included cable and the USB power adapter.
- Connect to a high-power USB 2.0 port using the included cable.

Attachme...

Category	Tutorials	Language	English
Date Creat...	2021-08-30 12:01	Publish Da...	2021-09-29

👎 Not Useful
👍 Useful

+ Add a Note

Wednesday
2021-09-29
16:14

Additional Devices

Please provide the different devices this article applies to. Thank you!

Wednesday
2021-09-29
16:10

Attention Required

This article requires some attention due to recent changes in the product.

If notes are available for the module, you can also view any notes you or the vendor has posted to the record, which will appear beneath the record's fields. If there are any files attached to the note, you can download them by clicking the file name or clicking the Download All button. If there is only a single image attached, the image is displayed directly within the note and the full-sized version can still be opened by clicking it. Refer to the [Adding Notes to Records](#) section below for details on how to create a note.

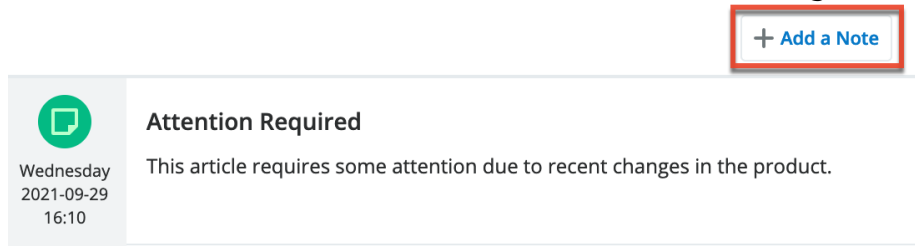
Adding Notes to Records

Notes in the portal can be used as a method of communication between you and the vendor regarding a knowledge base article if the vendor has enabled notes. This helps ensure that all communications related to the record are preserved and can be easily viewed via the module. If the vendor has enabled this option, you can add related notes to the record to provide any comments, additional information, or ask any questions you may have to the vendor. Once the note is added, it will appear at the bottom of the module's record view and your vendor will be able to view the note(s) related to the record as well. Please note that notes related to knowledge base articles will be visible by all portal users with access to the vendor's portal.

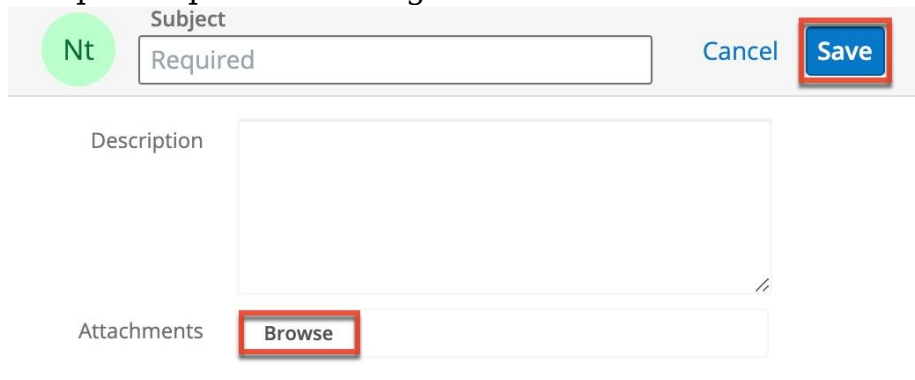
Note: There is a 30-second timeout limit for all uploads.

The following steps cover adding a note to a knowledge base article as an example, assuming the vendor has enabled notes for the Knowledge Base module:

1. Navigate to a knowledge base article's record view.
2. Click the "Add a Note" button below the knowledge base article's fields.



3. Enter appropriate details for the fields (e.g., Description) in the record view form and click the Browse button if you wish to attach any files to the note. All required fields will indicate "Required" in the field and must be completed prior to saving.



4. Once the necessary information is entered, click "Save" to preserve your note.

Note: Note records cannot be edited once saved.

Knowledge Base

The Knowledge Base module allows portal users to review any articles published by the vendor and can cover a variety of topics such as common troubleshooting tips, frequently asked questions, etc. If your vendor has enabled it, you can also [add notes](#) to the knowledge base article if you have any comments or questions that you wish to communicate to your vendor. The Knowledge Base is a useful resource containing helpful articles that may provide answers to your questions or help in troubleshooting an issue you are facing. To access the list of published articles, simply click the Knowledge Base module tab in the navigation bar to open the list view.

Once the list view opens, you can easily search by the article's name to pull up matching records or use the Filter option to narrow your search further using the

available options as follows:

Filter Options	Description
All Articles	Returns all knowledge base records in the module
Recently Created	Returns only articles that have been published within the last 7 days

You can click the article's name in the list view to open its record view and access additional details. If the article you are viewing contains any attachments, you can click the file pill (e.g., Additional Instructions.docx) in the Attachments field or click the Download link to the right of the field to download the attachment as a .zip file to your local machine. Please note that if the article has more than one attachment, the Download All link will display instead allowing users to download all attachments as a .zip file at once. While viewing the article, you also have the option to rate the article's usefulness by clicking the "Not Useful" or "Useful" buttons. Your rating will be captured in the vendor's system, which will help them determine which articles should be improved or updated, and which should be promoted as valuable information.

The screenshot shows a Knowledge Base article titled "Resetting the device". The article body contains instructions: "When things are not working as expected, try resetting the device. Hold the Start button until the dialog box displays. Select the Reset option." Below the body, there is an Attachments section with a file pill labeled "Additional Instr... .docx" and a "Download" button. The article also has a Category of "Troubleshooting", Language of "English", Date Created of "2019-09-19 13:20", and Publish Date of "2019-09-24". At the bottom right, there are "Not Useful" and "Useful" rating buttons.

Knowledge Base Fields

The Knowledge Base module contains a number of stock fields from the vendor's Knowledge Base. Please note that the fields that appear in the knowledge base's record view may vary depending on your vendor's configuration.

Field	Description
Attachments	Any files attached to the article

Body	The content of the article
Category	The category or topic specific to the article
Date Created	The date the article was created
Date Modified	The date the article was last modified
Description	A description or other information about the article
Name	The name of the article
Expiration Date	The date on which the article information will expire and no longer be available in the portal
Revision	The article's current revision number
Language	The language used in the article
Publish Date	The date the article was published
Status	The current status of the article

Knowledge Base Categories & Published Articles Dashlet

The Knowledge Base Categories & Published Articles dashlet displays in the Knowledge Base list view and record view and allows you to easily navigate the hierarchical structure of categories to locate published knowledge base articles. The folder icons represent categories while document icons represent articles. You can click the folder icon to expand and display the child categories and published articles. Clicking the article's name in the dashlet will open the article in record view. When viewing the dashlet in the Knowledge Base record view, the relative category will be expanded to display the current article you are viewing.

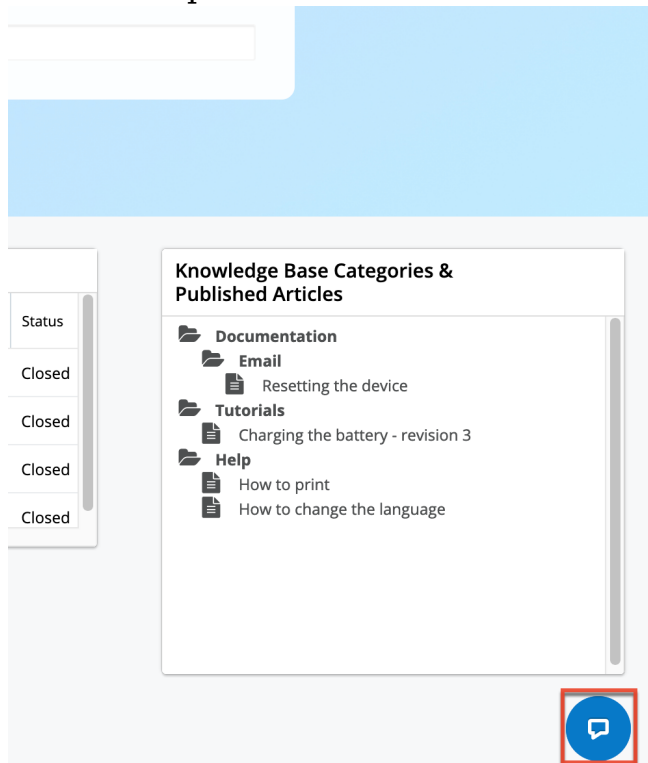
The screenshot shows the Knowledge Base Categories & Published Articles dashlet. On the left, there is a table with columns for Category, Language, and Date Created. The table contains three rows of data:

Category	Language	Date Created
Troubleshooting	English	2019-10-01 11:53
Troubleshooting	English	2019-09-24 14:28
Troubleshooting	English	2019-09-24 14:26

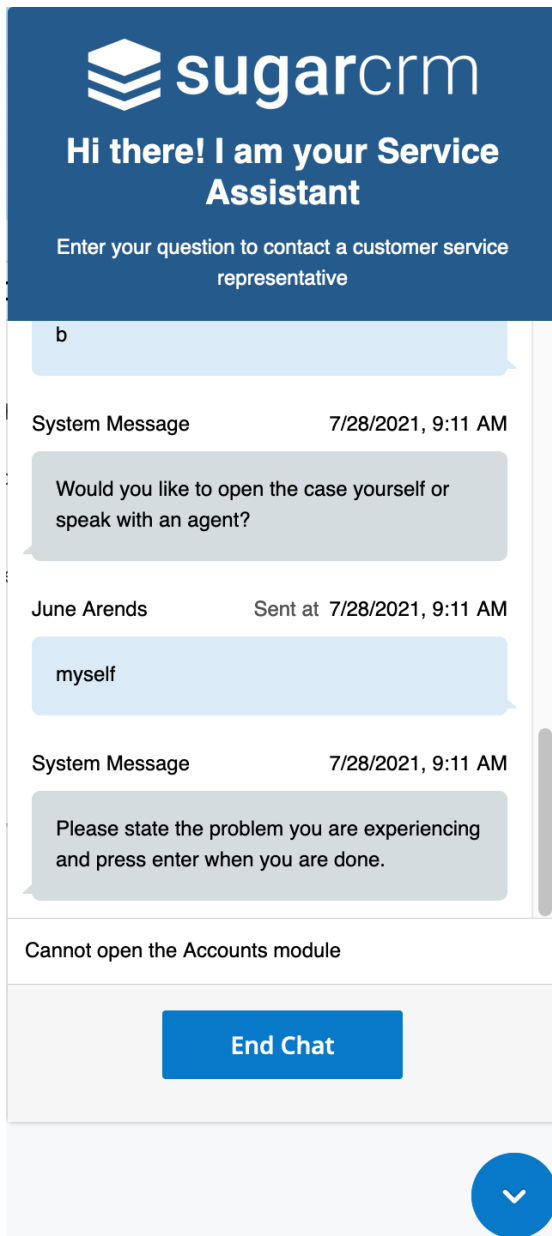
On the right, there is a hierarchical tree view of categories and articles. The categories are: Documentation, Tutorials, Help, and Troubleshooting. The 'Resetting the device' article is highlighted in the tree view.

Sugar Portal Chat

If your vendor offers communication via chat in the portal, you will see a chat bubble button in the bottom right corner of the portal. Click the chat bubble to start a chat session. This could either connect you directly to a customer service agent or sales representative or connect you to a chatbot that allows you to perform certain actions or make certain requests, depending on how your vendor has it set up.



When you start a chat, that chat window opens and you can read incoming messages from the system or an agent and type in the text box to respond. Press Enter or Return on your keyboard to send a message that you have typed.



If you are using a chatbot to perform an action, any access restrictions that apply to records in the portal also apply in the portal chat. For example, if you use a chatbot to check the status of a case, you can only do so for cases that were filed by your company and to which you have access.

The chat window stays open as you navigate through most screens of the portal, but you can minimize it using the down arrow button and open it again at any time to resume your conversation. When you are done chatting, click the End Chat button to close the chat session. Note that refreshing your browser while in a chat will end the session, whether it is minimized or maximized at the time.

Note that Sugar Portal Chat is only supported for use with certain web browsers. For more information, refer to the [Supported Platforms](#) page.

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