Sugar Enterprise 8.1 Portal Deployment User Guide

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Overview

The Sugar Portal is a powerful tool that allows Sugar users to interact with customers and share information related to multiple modules (Bugs, Cases, Knowledge Base). 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. This will 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, please refer to the Team Management and Role Management 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. In the contact's record view, you can set up the username and password that the contact will use to log into the portal. In addition, the Portal Active checkbox option must be enabled in order to enable access to the portal. Portal users can be created either through a process initiated by the customer from the portal, or by a Sugar user via the Contacts 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 username or password. During the registration process, the customer will need to provide their first and last name, email address, as well as the name of the company to which they belong. When the customer submits this form, a lead will be created in your Sugar instance. The lead must then be qualified and converted to a contact. After the lead is converted, edit the contact to assign a username, password, and mark the Portal Active checkbox. Once this process is complete, the portal user will be able to log into their portal account.

Creating Via Contacts Module

Sugar users can create portal users by populating three specific fields (Portal Name, Password, Portal Active) in the Contacts module. Please note that the Portal Active checkbox option must be enabled in order to enable the user's access to the portal. In addition, the user's portal name must be unique to any other existing portal names in the instance. For more information on editing or creating a contact, please refer to the Contacts documentation.

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, please refer to the Team Management and Role Management documentation in the Administration guide.

Editing Portal Users

The contact's portal account details (Portal Name, Password, Portal Active) can be edited via the Contacts record view. For more information on editing contacts, please refer to the Editing Records section of the User Interface documentation. You can change the user's portal name, update their password, or disable access to the portal by updating the specific field(s) in the record view. 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 open text box.

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 Team Management and Role Management documentation in the Administration guide.
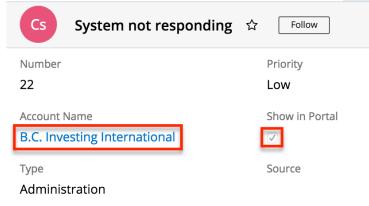
In addition, registered portal users are able to update their contact information via their user profile in the portal. This allows customers to keep their contact information up-to-date and make any changes as necessary. If the user's portal password needs to be updated, it can be done via the user profile as well.

Note: Any changes made to the user profile will be reflected in Sugar as well.

Managing Cases

The Sugar Portal allows customers to create and track their open cases, as well as communicate with the assigned support representative. [Contacts](#) are able to view [cases](#) that are associated to their [account](#), meaning that both the contact and case need to be associated to the same account in order for the case to appear in the contact's portal.

Note: The Show in Portal checkbox option must be enabled in the case's record view in order for the case to be visible in the portal.

Portal users will be able to review details such as the status of the case, as well as any updates made on the case. In addition, portal users will be able to view [notes](#) that the assigned support representative has added to the case. For more information on adding notes to cases, please refer to the [Adding Notes and Attachments to Cases](#) section of this documentation. Portal users can also add notes to the case via the portal, which will appear in the Notes subpanel of the Cases record view. For more information on related record subpanels, please refer to the [Related Record Subpanels](#) section of the User Interface documentation. 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 case's record view, Sugar users have the ability to add notes to the case by clicking the Plus button on the upper right of the Notes subpanel. Please keep in mind that the Display in Portal checkbox option in the note's record view must be enabled in order for the note to appear in the [portal](#). The portal user will be able to view the note's Subject, Description, etc., as well as 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. Please refer to the [System](#) documentation in the

Administration Guide for more information.

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 [Team Management](#) and [Role Management](#) documentation in the Administration guide.
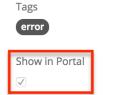
Managing Bugs

The Sugar Portal allows customers to submit bugs to your company, track the status of bugs to receive details on current progress, and communicate with the assigned representative regarding the bug. Please note that [bugs](#) can be seen by all portal users, regardless of any account membership.

Note: The Show in Portal checkbox option must be enabled in the bug's record view in order for the bug to be visible in the portal.
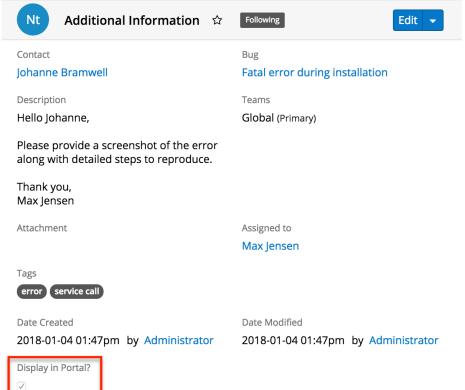
Portal users will be able to review details such as the status of the bug, as well as track any updates regarding the fix. In addition, portal users will be able to view [notes](#) that the assigned support representative has added to the bug. For more information on adding notes to bugs, please refer to the [Adding Notes and Attachments to Bugs](#) section of this documentation. Portal users can also add notes to the bug via the portal, which will appear in the Notes subpanel of the Bugs record view. For more information on related record subpanels, please refer to the [Related Record Subpanels](#) section of the User Interface documentation. 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's record view, Sugar users have the ability to add notes to the bug by clicking the Plus button on the upper right of the Notes subpanel.

Note: The Display in Portal checkbox option must be enabled in the note's record view in order for the note to appear in the [portal](#).

The portal user will be able to view the note's Subject, Description, etc., as well as 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. Please refer to the System documentation in the Administration Guide for more information.

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 Team Management and Role Management documentation in the Administration guide.

Managing Knowledge Base

The Sugar Portal allows customers to review your company's published Knowledge Base articles. In order for an article to be visible through the Sugar Portal, the article must meet the following requirements:

- **External Article** : Field must be checked
- **Status** : Status must be set to "Published"

For example, portal users will be able to reference these articles when trying to troubleshoot some common issues. The Body of the article will be presented with all the HTML styling that is shown in the article's record view. For more information on viewing an article's record view, please refer to the Viewing via Record View section of the User Interface documentation.

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