
Sugar Sell 10.2 Portal User Guide

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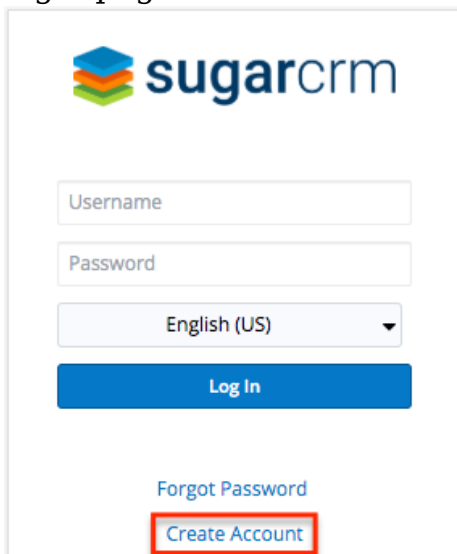
Sugar Sell 10.2 Portal User Guide

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.

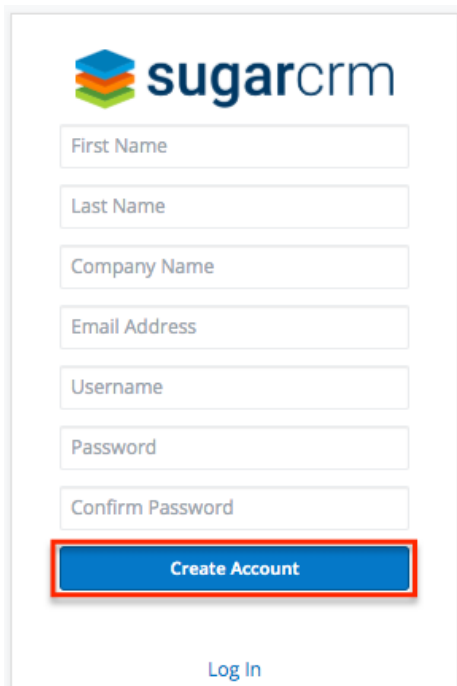
Signing up for the Support Portal

In order to access the support portal, you must first sign up for a portal account via the URL provided by your vendor and click "Create Account" on the portal's login page.



The image shows a screenshot of the SugarCRM login page. At the top left is the SugarCRM logo. Below it are two input fields for 'Username' and 'Password'. Underneath these is a dropdown menu currently set to 'English (US)'. A blue 'Log In' button is positioned below the dropdown. At the bottom of the form area, there are two links: 'Forgot Password' and 'Create Account'. The 'Create Account' link is highlighted with a red rectangular box.

Complete the registration form, including all required fields (e.g. Email Address, Username, Password), then click "Create Account". 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, which consists of a colorful cube icon followed by the text 'sugarcrm'. Below the logo are seven input fields: 'First Name', 'Last Name', 'Company Name', 'Email Address', 'Username', 'Password', and 'Confirm Password'. A blue button with the text 'Create Account' is positioned below the 'Confirm Password' field and is highlighted with a red border. At the bottom of the form is a blue link labeled 'Log In'.

Accessing the Support Portal

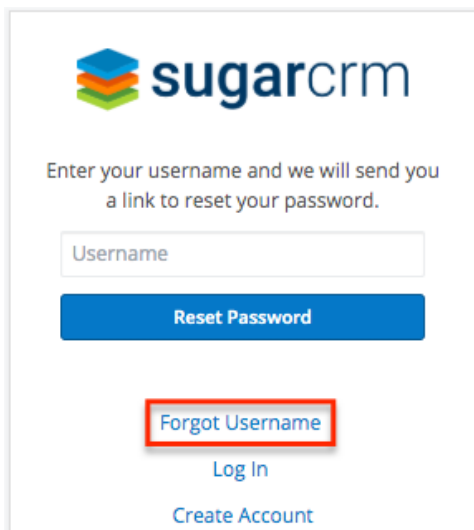
Once your portal account has been activated, you can navigate to the portal's login page using the portal URL previously provided by your vendor. If you do not have an active portal account, you will need to sign up for portal access by following the instructions in the [Signing up for the Support Portal](#) 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 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.

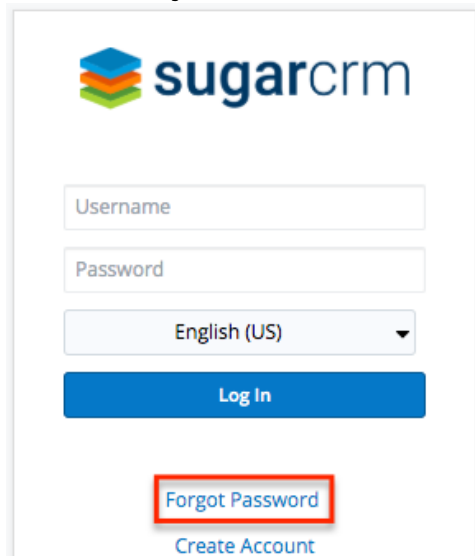


If you have forgotten your password, then you can reset it by clicking the [Forgot Password](#) link and entering your username in the next screen. For more information on resetting your password, please refer to the [Resetting Your Password](#) section below.

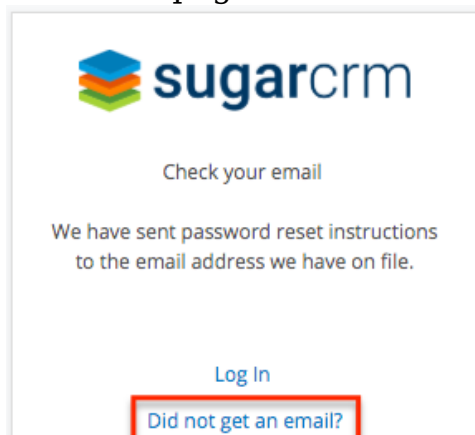
Resetting Your Password

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".

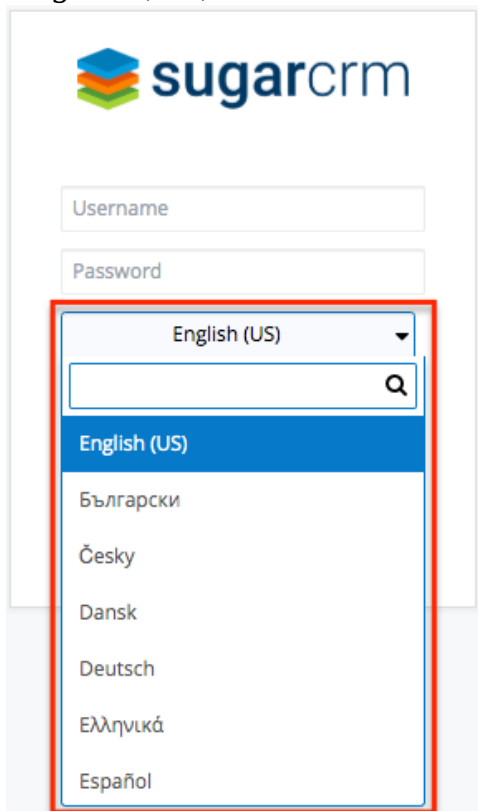


An email containing instructions to reset your password will be sent to the email address the vendor has on file for you. Simply click the link in the email which will open the reset password page where you will enter your new password and confirmed password. Please note that the new password must conform 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.



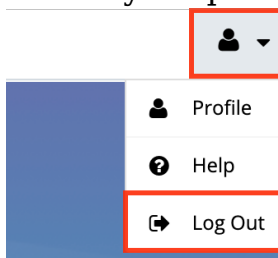
Setting Your Language

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.

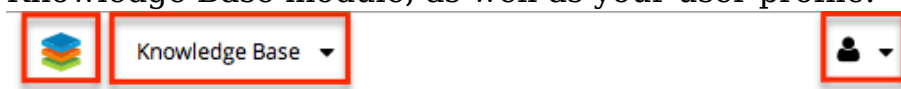


User Interface

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 company 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.

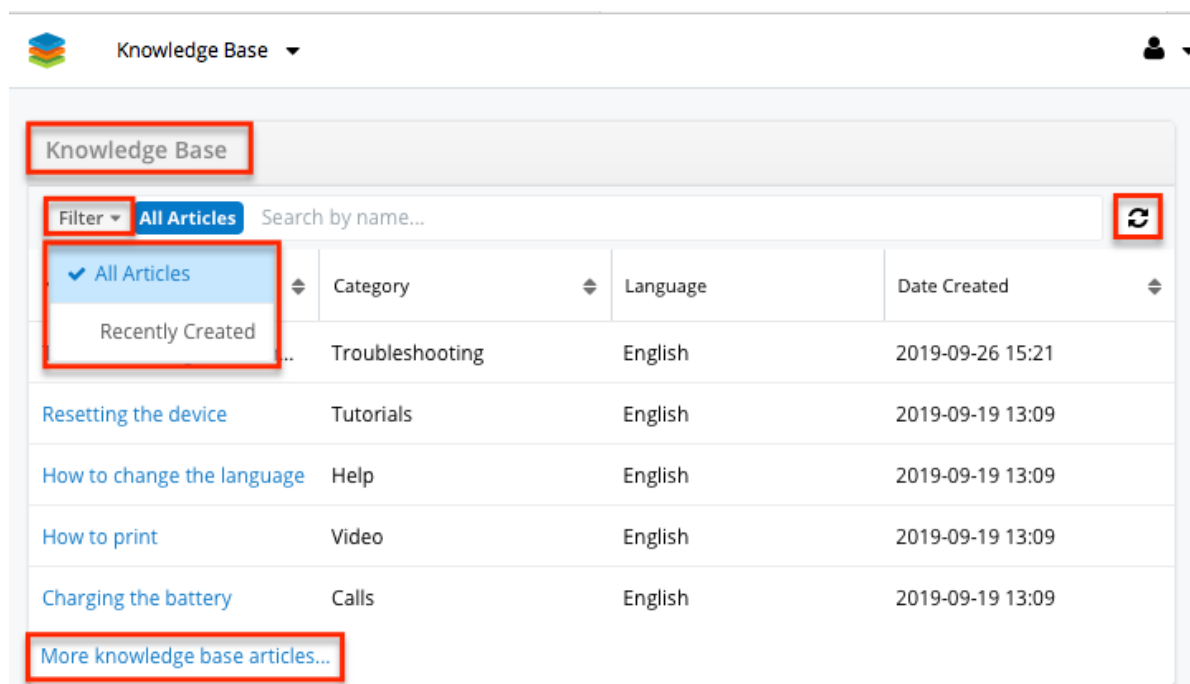
Home

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.



Module Tabs

The Knowledge Base module tab is located to the right of the company 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.

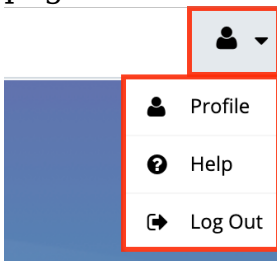


The following operations are available in the module tab's Actions menu:

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.

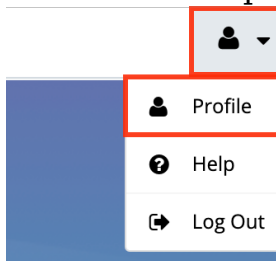
Field	Description
Alternate Address	Your secondary address (e.g. billing or shipping)
Assistant	The name of your assistant
Assistant Phone	The assistant's phone number
Birthdate	Your date of birth
Date Created	The date your contact information was entered into the system
Date Modified	The date your contact 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 which 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 with 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 address are icons for favorite, delete, info, and a minus sign. Below the email address is an 'Add email' button with a plus sign. A section for password change is highlighted with a red box, containing fields for 'Current Password', 'New Password', and 'Confirm Password'. Below this are fields for Office Phone, 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 (e.g. knowledge base) 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 utilize 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 view the list of your recently viewed records. You can 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 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 table with columns: Name, Category, Language, and Date Created. The first row is highlighted in blue and contains the text 'Troubleshooting users unable to view records', 'Troubleshooting', 'English', and '2019-09-26 15:21'. To the right of the table is a 'Preview' pane. The preview pane has a title bar with navigation arrows and a close button. Below the title bar, there is a 'KB' icon and the name of the article, 'Troubleshooting users unable to view records'. Below the name, there is a 'Body' section containing the text: 'Occasionally a user may report that they are unable to access their records in the system. This article covers some of the troubleshooting steps you can apply to try and identify the reason why some users are unable to view records.' Below the body, there is an 'Attachments' section and a 'Category' section with the value 'Troubleshooting'.

The dashlets on the home page also allows 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 utilizing 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.

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.

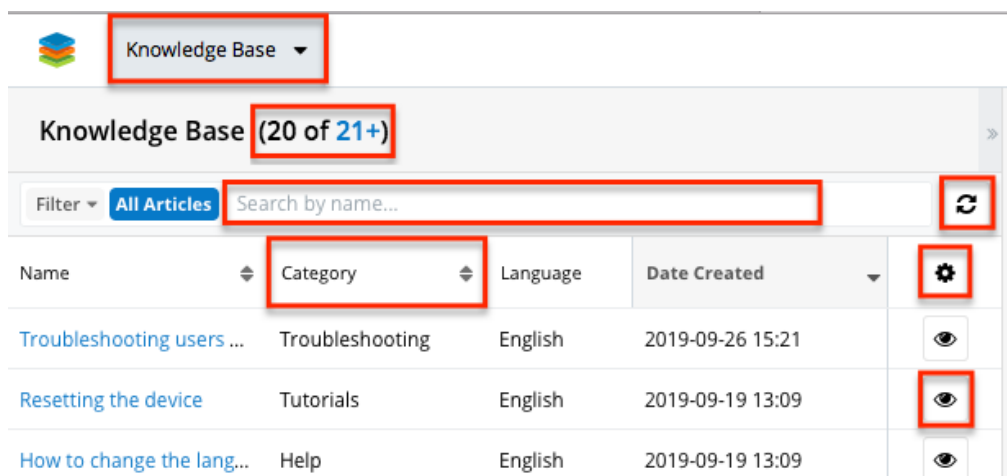
Module List View

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:

- **Record Count** : The list view displays the total count of records on the upper left of the screen next to the module name (e.g. Knowledge Base). The count will capture the total number of records displayed on the current set of list view results. If there are additional records in the list view results set, a hyperlinked number (e.g. "21+") will display to the right of the initial count. Simply click the hyperlinked number in the parentheses to view the total count of all records in the list view result set.
- **Create Record** : Click the Create button on the upper right of the module's list view to create new record's in the module.
- **List View Search** : To search for a specific record within a module or for a list of module records by name, use the search bar located above the module's list view. 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.
- **Refresh Search Results** : Click the Refresh button to the right of the search box to load the most current list of matching records without reloading the browser or losing any filter or search criteria you may have set.
- **More Records** : The list view loads an initial number of records meeting the current search criteria with the option to show additional results upon request. By default, the portal displays 20 records per list view results set, but the vendor can change the number of records to display in the list view.

To load the next set of list view results, simply click the More "Module Name" link (e.g. More knowledge base articles...) at the bottom of the list view.

- **Column Sorting** : Sort all of the current search results by a field column in either ascending or descending order by clicking the column header noting that the fields which allow sorting will have a pair of arrows. Please note that the list view may be sorted by only one column at a time.
- **Column Resizing** : Adjust the size of the columns by placing your cursor on the column divider, and when the left-and-right arrow appears, click and drag the column to the desired size.
- **Column Selection** : Personalize the list view by specifying which fields you want to be displayed in the list view. Click the Gear icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column in your list view.
- **Preview**: Click the Preview button (eye icon) to the far right of each record's row in the module's list view to view a record's details via the right-hand side pane.



Module Record View

The module's record view displays thorough information regarding the record including all relevant fields (e.g. subject, name, status). Please note that 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 button will expand the record view to the full-screen width. Please note that the preview pane to the

right of the record view will be hidden when the record view is expanded. To reduce the record view's width and reveal the preview pane, simply click the double arrow icon again.

The screenshot shows a Knowledge Base interface. At the top left, there is a 'Knowledge Base' dropdown menu. The main header displays 'KB Troubleshooting users unable to view records' with navigation arrows. To the right, a 'Preview' pane is visible, containing details for a note: 'Subject: Additional Use Cases', 'Description: Please provide the different use cases that this article would be applicable for. Thank you~', 'Attachment', and 'Date Created: 2019-10-01 12:45'. Below the description is a 'Show more...' link. A red arrow points from the 'Additional Use Cases' note in the 'Notes' section to the 'Show more...' link in the preview pane. The 'Notes' section includes an 'Add a Note' button and two existing notes: 'Additional Info' (3 minutes ago) and 'Additional Use Cases' (15 minutes ago). The 'Additional Use Cases' note has a red box around its subject and a red box around its eye icon.

You can also view any notes you related or the vendor has posted to the record, which will appear beneath the record's fields. Clicking the note's subject or Preview icon will display relevant details of the note in the preview pane to the right of the record view. In addition, if there are any files attached to the note, you can download it by clicking the file name in the Attachment field. On the upper right of the preview pane, there is a Left and Right arrow button that allows you to scroll through the notes attached to the record. To close the preview, click the "X" on the upper right of the preview pane. To add a new note, simply click the Add a Note button to the far right of the Notes header. For more information on adding notes to records, please refer to the [section](#) below.

Adding Notes to Records

Notes in the portal can be used as a method of communication between you and the vendor regarding the knowledge base article. This helps ensure that all communications related to the record are preserved and can be easily viewed via

the module. 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 in the Notes panel of the module's record view and your vendor will be able to view the note(s) attached to the record as well. Please note that notes attached to knowledge base articles will be visible by all portal users with access to the vendor's portal and not just to portal users in your organization.

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:

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 Choose File button if you wish to attach a file 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

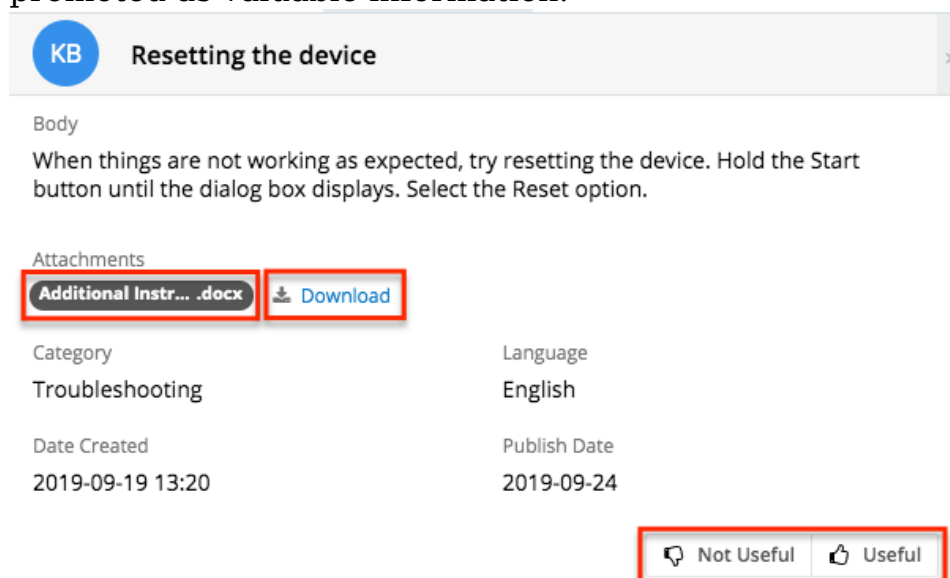
The Knowledge Base module allows portal users to review any articles published by the vendor and can cover a variety of topics such as common troubleshooting tips, frequently asked questions, etc. You can also [add notes](#) to the knowledge base article if you have any comments or questions that you 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.



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.

Knowledge Base ▾ 👤 ▾

Knowledge Base Categories & Published Articles

- Documentation
- Tutorials
- Help
 - Resetting the device
 - How to change the language
- Troubleshooting
 - Troubleshooting missing records in the system
 - Troubleshooting users unable to log in to the system
 - Troubleshooting users unable to view imported records
 - Troubleshooting broken buttons

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	👁

Last Modified: 2020-09-24 20:25:49