User's Guide

info@hand Customer Portal

1.0

Glenn Richmond

CRM Online Australia Pty Ltd
Perth
Australia
+61 (8) 9415 1366
Internet E-Mail: support@crmonline.com.au
Website: http://www.crmonline.com.au

Contents

Introduction

This document covers the installation and management of your info@hand customer portal developed. In order to install the info@hand customer portal, you must have the following prerequisites installed:

1) A valid installation of info@hand v6.0.x with at least one admin user

2) A LAMP installation that matches the requirements of running info@hand

- PHP 5.2
- Apache

1. Typographical Conventions

Before you start using this guide, it is important to understand the terms and typographical conventions used in the documentation.

For more information on specialized terms used in the documentation, see the Glossary at the end of this document.

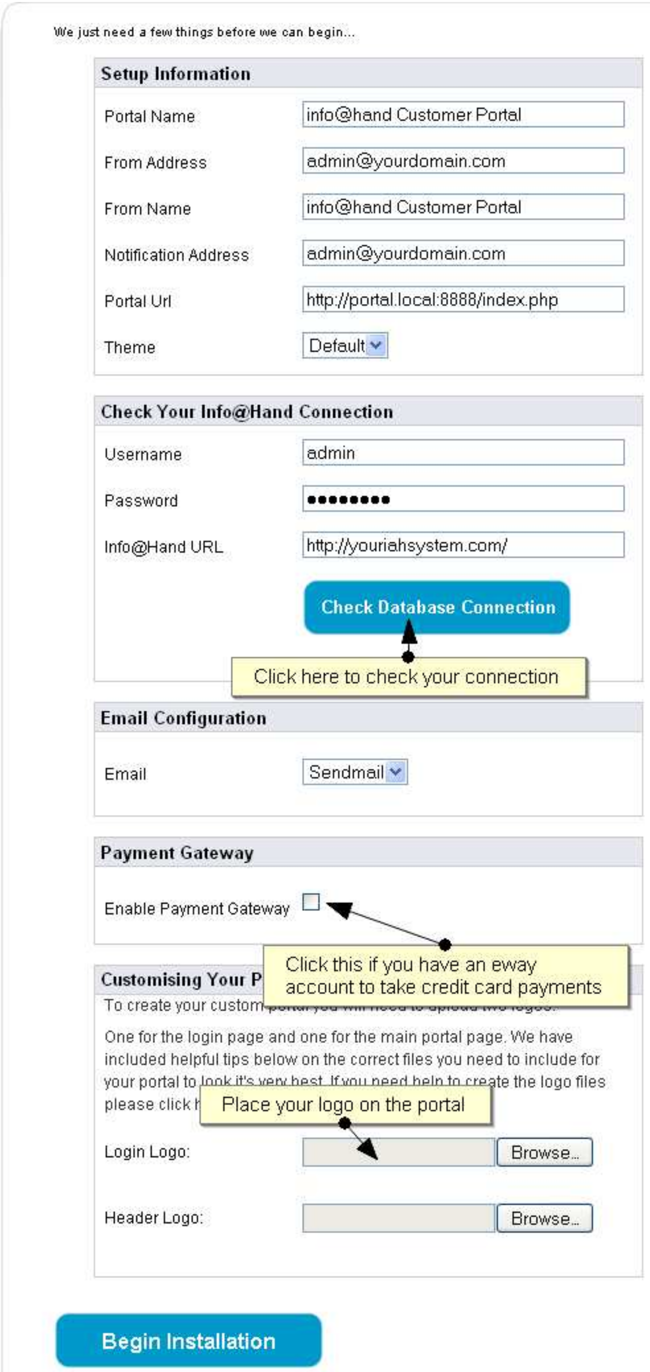
The following kinds of formatting in the text identify special information.

Formatting convention	Type of Information
Numerical Lists (1., 2. etc)	Step-by-step procedures. You can follow these instructions to complete a specific task.
Special Bold	Items you must select, such as menu options, command buttons, or items in a list.
Emphasis	Use to emphasize the importance of a point or for variable expressions such as parameters.

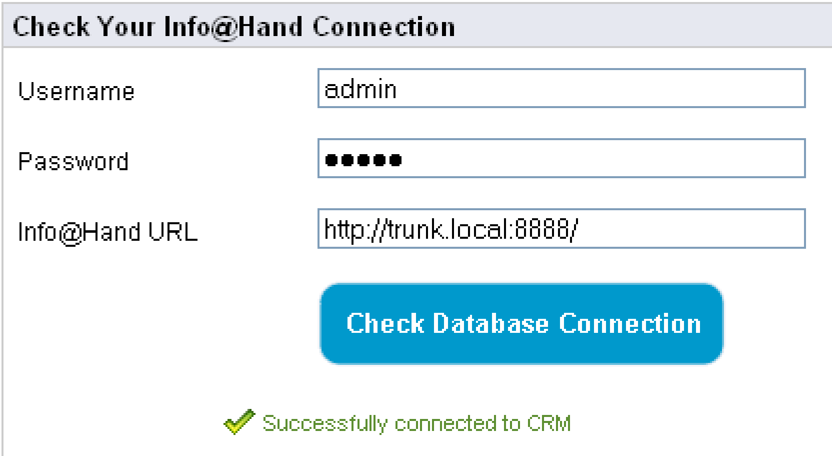
Installation

This section covers the installation of the customer portal. In order to initiate the installation, follow the following:

1) Extract your customer portal in a web-accessible location and go to the address of the installation (for example, http://portal.yourdomain/). This will bring up the screen shown below. Please ensure that your application directory is writable.

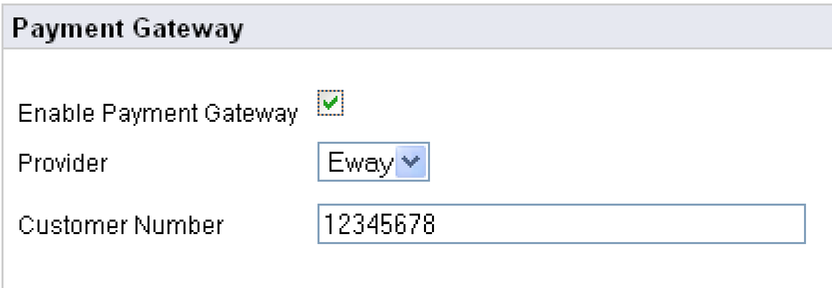


2) Once you're at this screen, the first thing to do is to check your connection to the CRM. To do this, enter the address of your CRM along with a username and password and click on "Check Database Connection". If successful, you'll see a screen as shown below.



3) Once you've got a valid connection to the CRM, you should customise the portal name and email configuration to suit your requirements. The settings here will depend on your server configuration.

4) If you would like your customers to be able to pay invoices via the customer portal, you should enable the payment gateway. This will then prompt you for your eway customer number as shown below. Eway will provide this number to you when you sign up for an account.



5) Once you have configured all of the settings, click on "Begin Installation" if all goes well, you should see a success message and be redirected to the portal login page.

Managing your Portal Users

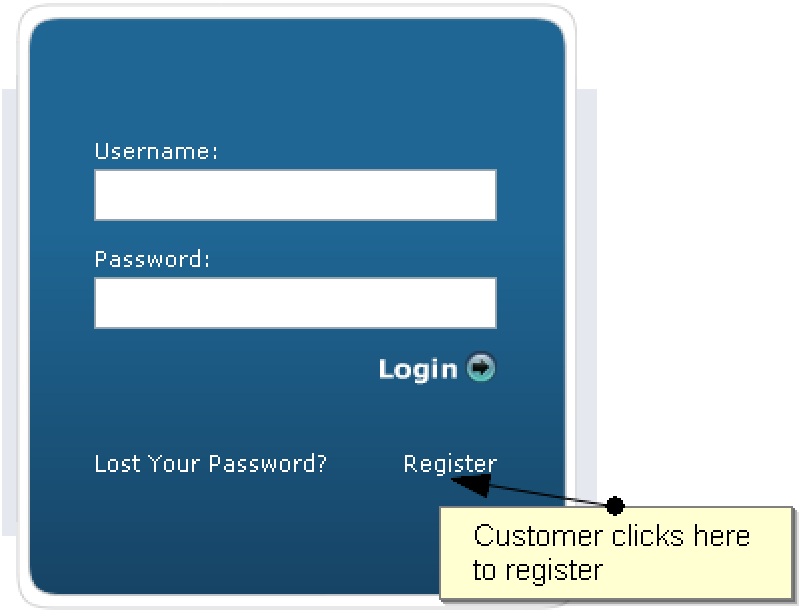
This section covers the various aspects of managing your customer portal user accounts.

In This Chapter

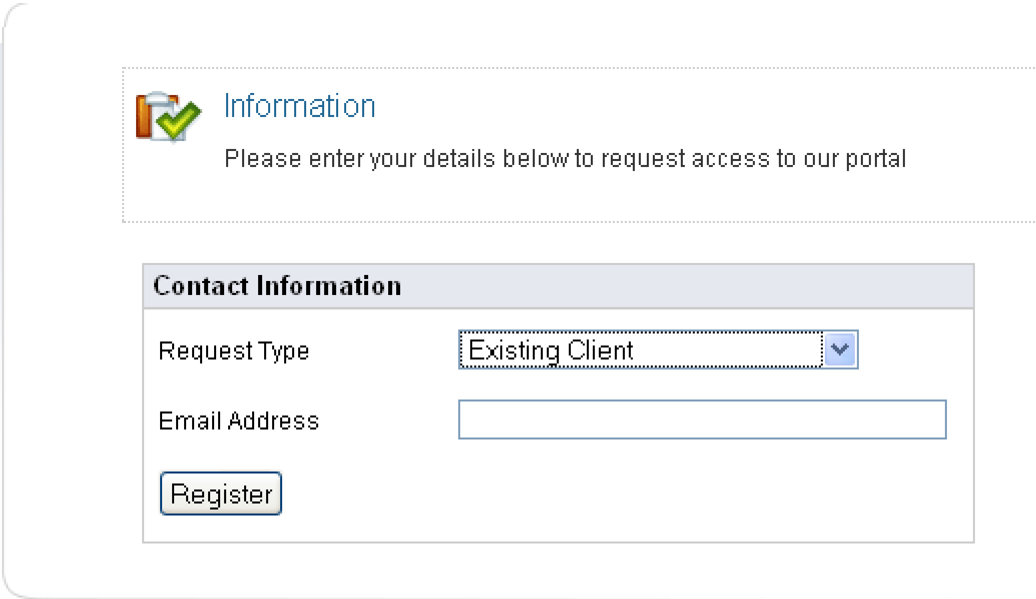
2. Registering Existing Customers

The process for registering new portal users is initiated by the end user from the login screen of the portal. The process is:

1) The user clicks on "Register" on the portal login page as shown below.



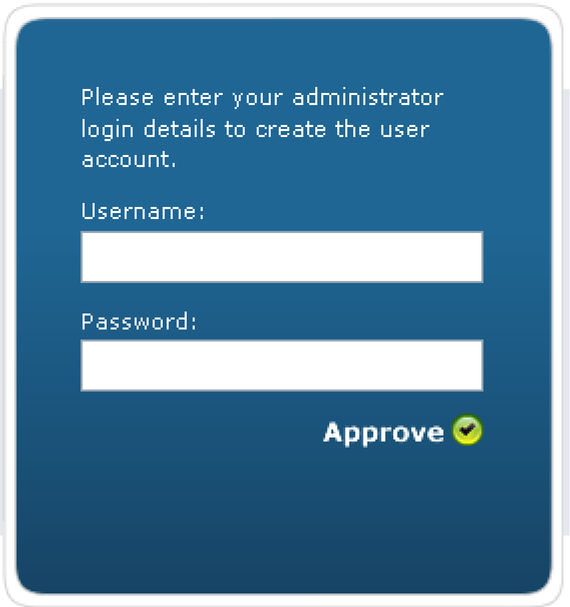
2) This brings the customer to a screen that gives them the option of creating an account as an existing customer or registering their details to create a new account. The screen is shown below.



3) Once the user enters their email address, the system searches for an existing contact and if successful, it does the following:

- An email is sent to the notification address for confirmation of the user account creation
- The customer is displayed a message that indicates success

4) At this point, a CRM Administrator must click on the link within the email and approve the account creation as shown below. Note that the username and password must be for an active admin user within the CRM.



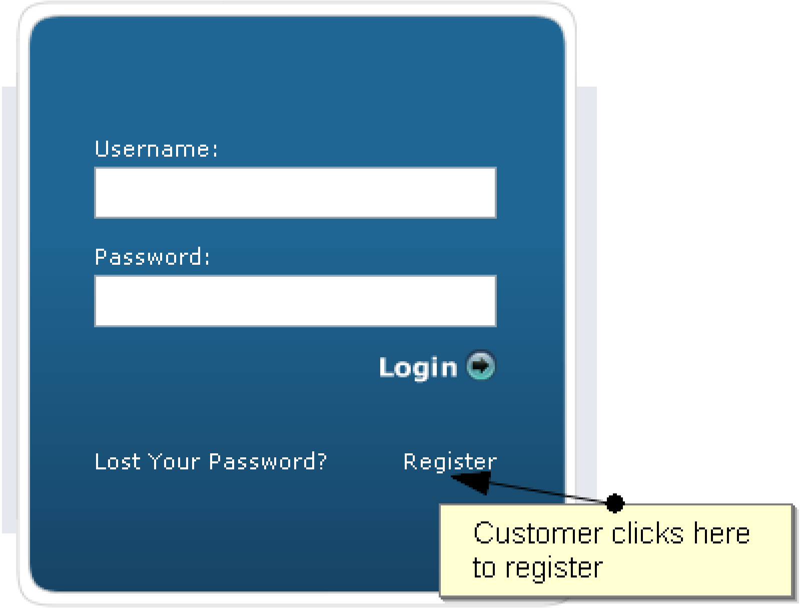
5) Once the admin user clicks on the approve button with a valid username and password, the following occurs:

- A portal user is created within the CRM
- The portal username is added to the contact record
- The customer is sent a welcome email with their login details

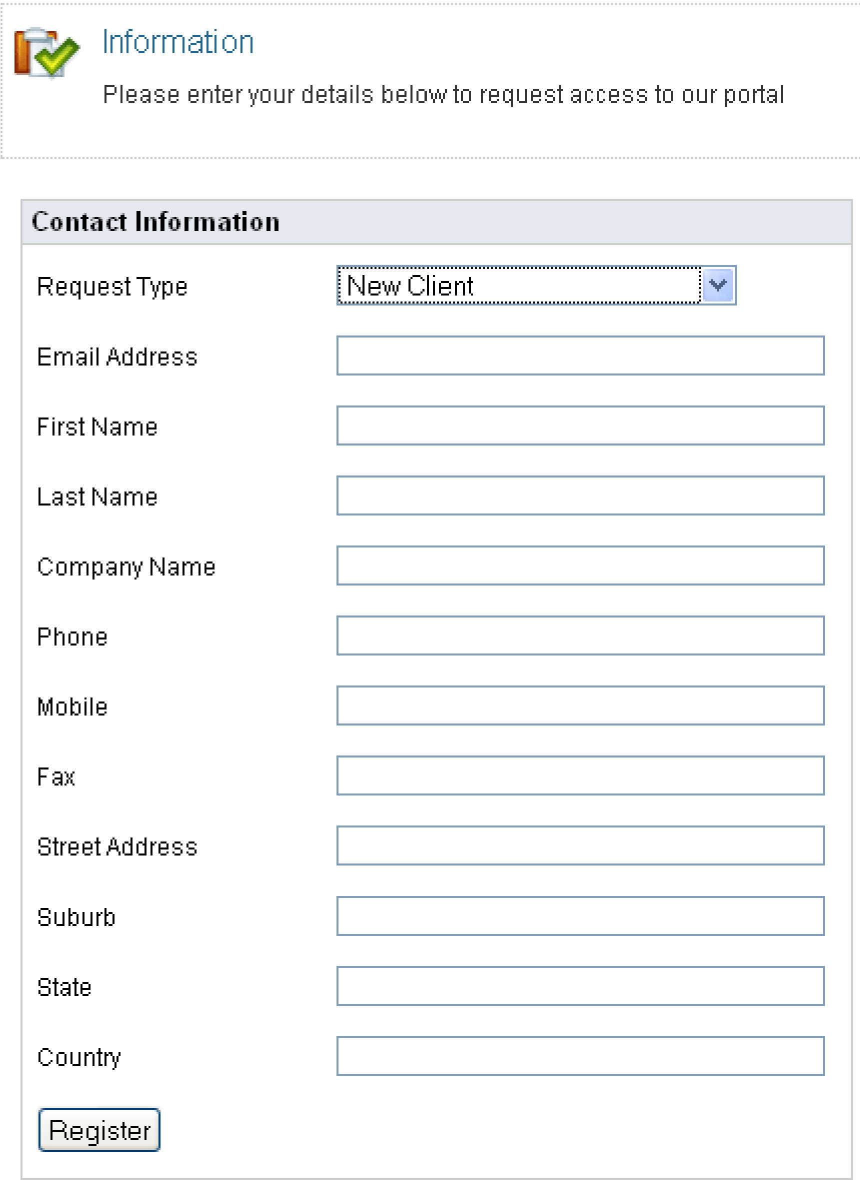
3. Registering New Customers

The process for registering new customers that don't already existing within the CRM starts in the same way as registering existing contacts:

1) The user clicks on "Register" on the portal login page as shown below.



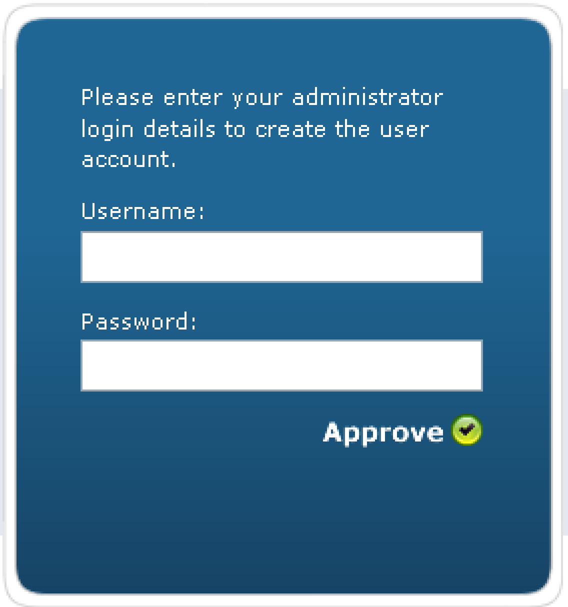
2) This brings the customer to a screen that gives them the option of creating an account as an existing customer or registering their details to create a new account. At this point, the customer selects "New Client" from the dropdown list and the system will display the full registration details as shown below.



3) Once the user enters their details, the system creates a new lead and does the following:

- An email is sent to the notification address for confirmation of the user account creation
- The customer is displayed a message that indicates success

4) At this point, a CRM Administrator must click on the link within the email and approve the account creation as shown below. Note that the username and password must be for an active admin user within the CRM.



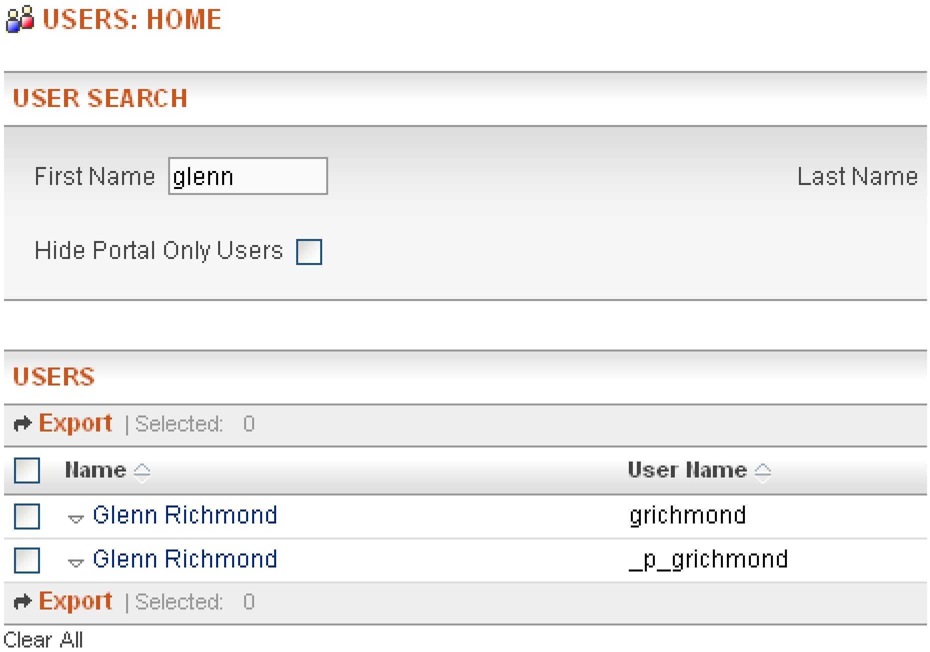
5) Once the admin user clicks on the approve button with a valid username and password, the following occurs:

- The lead is converted to a contact and account (if the company name is entered)
- A portal user is created within the CRM
- The portal username is added to the contact record
- The customer is sent a welcome email with their login details

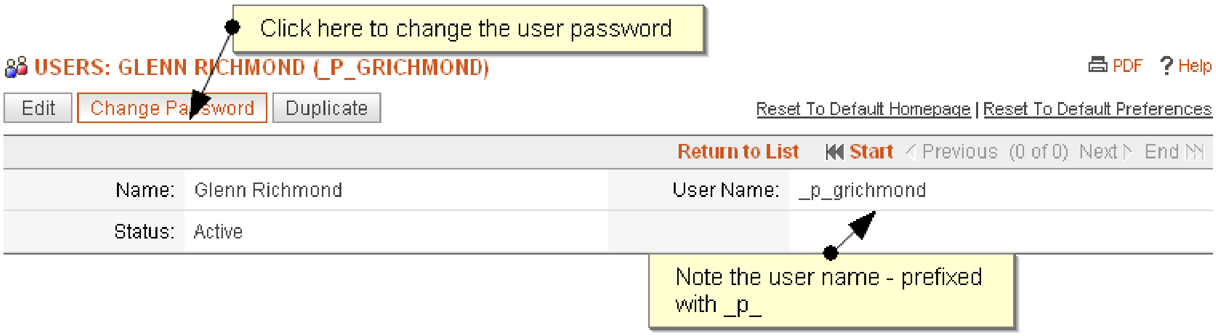
4. Debugging User Accounts

If a customer ever has issues accessing your customer portal using their login details, there are two areas to check.

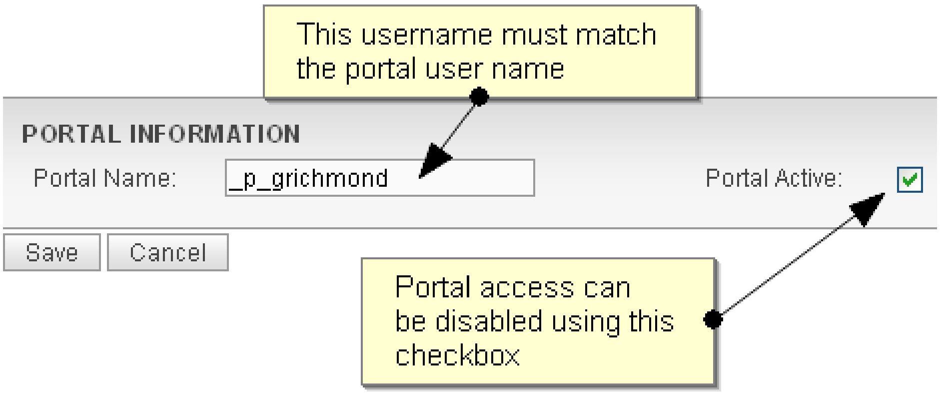
1) All portal users are listed under Admin->User Management as shown below. Note that portal users all have a user name that is prefixed with "_p_". This enables us to easily identify portal users based on the user name.



2) When you click on the user, it will display the screen below. Note that you can change the portal user password from this screen. The user name must remain consistent.



3) The portal user is linked to the customer contact record. You can view the portal information related to a contact by navigating to a contact edit view and viewing the "Portal Information" section of the record. Note that this is only editable if you are an administrator.



4) If the information shown above looks correct, the final item to check is to verify the connectivity between the portal and the CRM.

Viewing, Editing and Creating Records

The customer portal allows the customer to view records related to their account and create bugs, cases and quote requests.

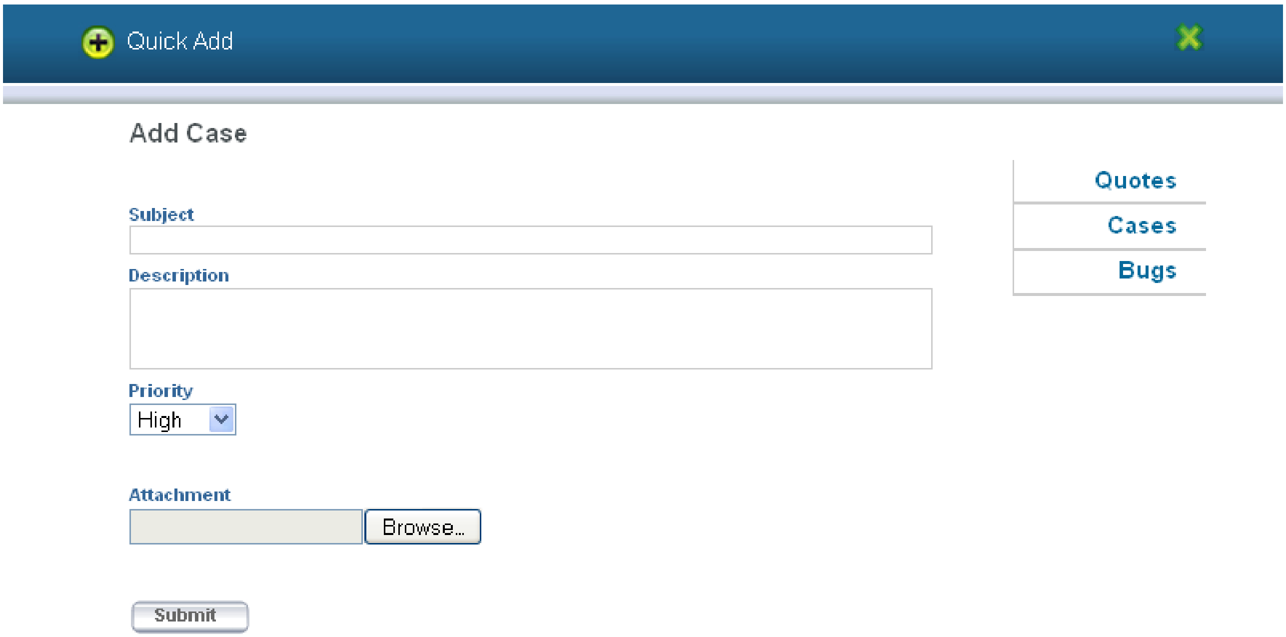
In This Chapter

5. Adding a New Record

Customers are able to create bug reports, cases and quote requests. In order to create a new record, the customer must following the steps below.

1) The customer must click on the "Quick Add" button as shown below.

2) This will display the add case screen shown below. The user has the ability to create a bug, case or quote request. The user can enter the case subject, description and priority. They can also add multiple attachments to the case. All files are attached to the case within the CRM as notes. In the case of a bug report, the customer has similar options.



3) When a case is created, the following occurs;
   - The customer is shown a thank you message
   - A notification is sent to the customer thanking them for submitting the case. The notification address is copied in this email as a notification that a new case has been created
   - The case is created in the CRM and any attachments are attached to the case as notes

4) When a bug report is created, the following occurs;
   - The customer is shown a thank you message
   - A notification is sent to the customer thanking them for submitting the bug report. The notification address is copied in this email as a notification that a new bug report has been created
   - The bug report is created in the CRM and any attachments are attached to the case as notes

5) When the quote request is submitted, the following occurs;
   - The customer is shown a thank you message
   - A notification is sent to the customer thanking them for submitting the quote request. The notification address is copied in this email as a notification that a new quote request has been created

- A note is created against the contact record in the CRM as a record that the quote request has been received

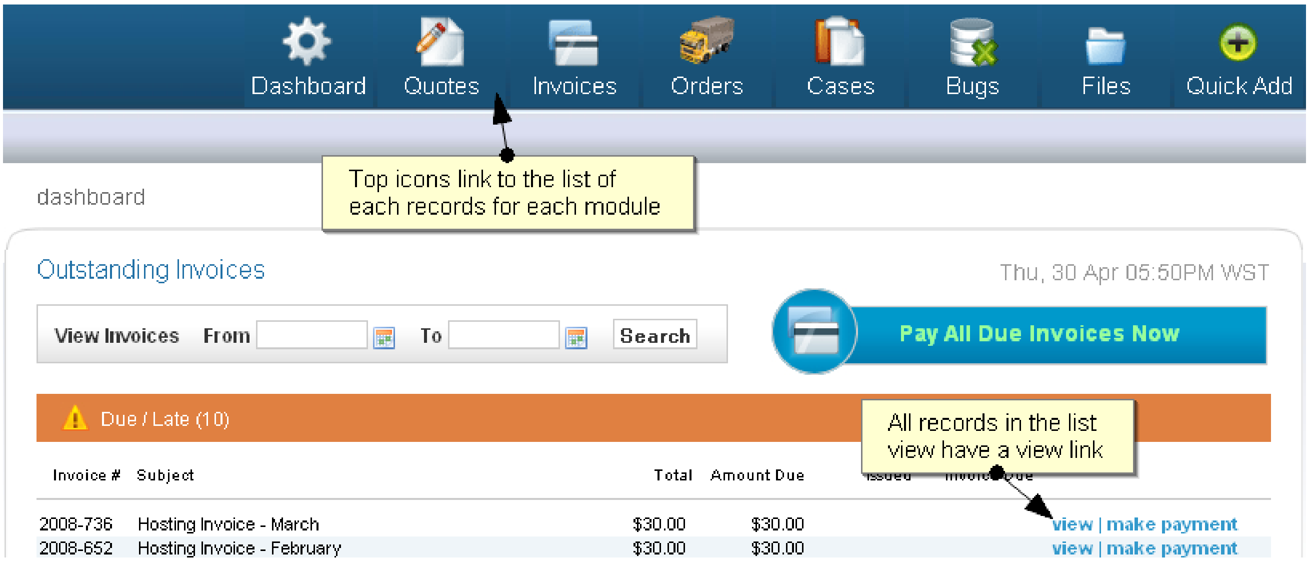
6. Viewing / Editing Existing Records

The customer portal allows the customer to view the following record types:

Portal Module	**CRM Module**
Bugs	Software Bugs
Cases	Cases
Quotes	Quotes
Invoices	Invoices
Shipping	Shipping
Orders	Sales Orders
Files	Documents

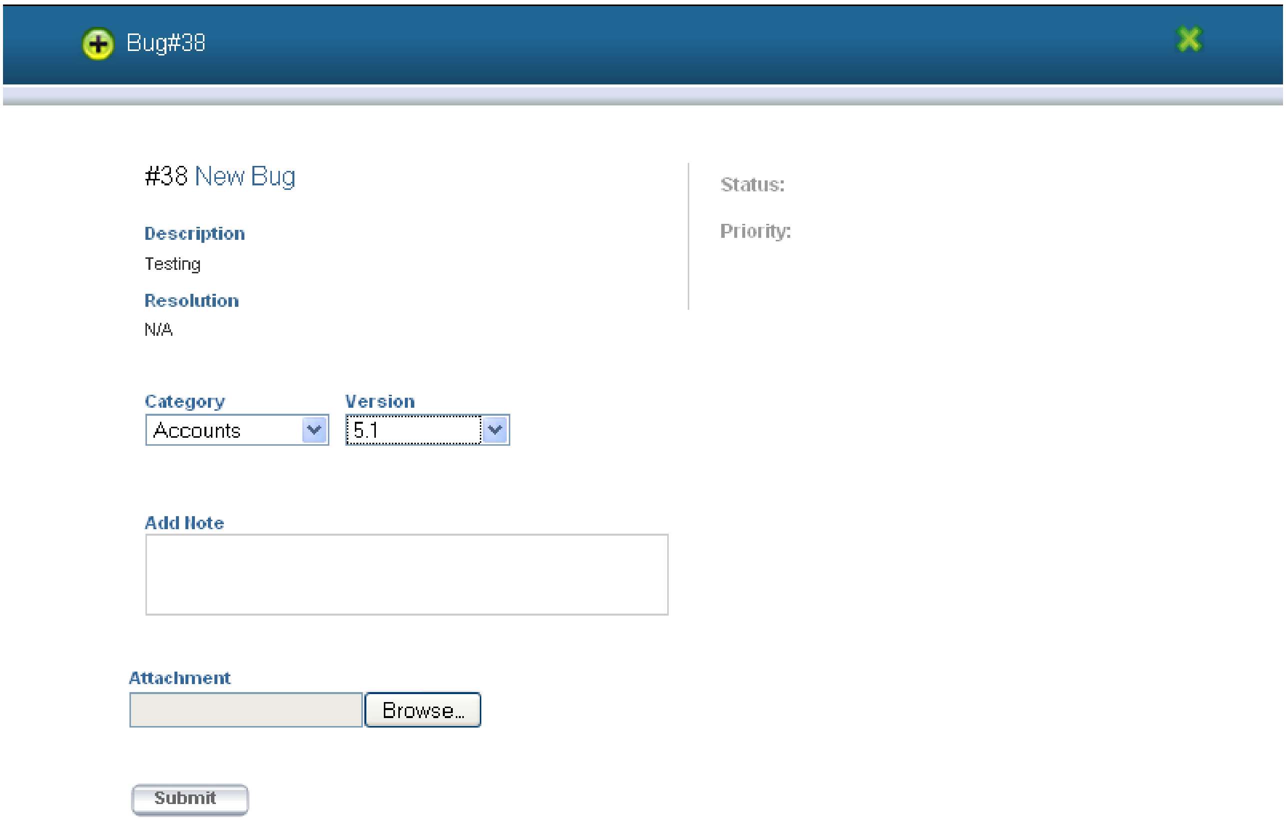
As a general rule, if a customer wants to view a particular record within the customer portal, they can access a list of these records by clicking on the top icon as shown below. The records that are displayed are a combination of the records that their individual contact is related to along with the account/s that they belong to.

For example, to make a quote available for a contact to view within the portal, simply create a quote against the contact's account, or set that contact as the billing contact for the quote.



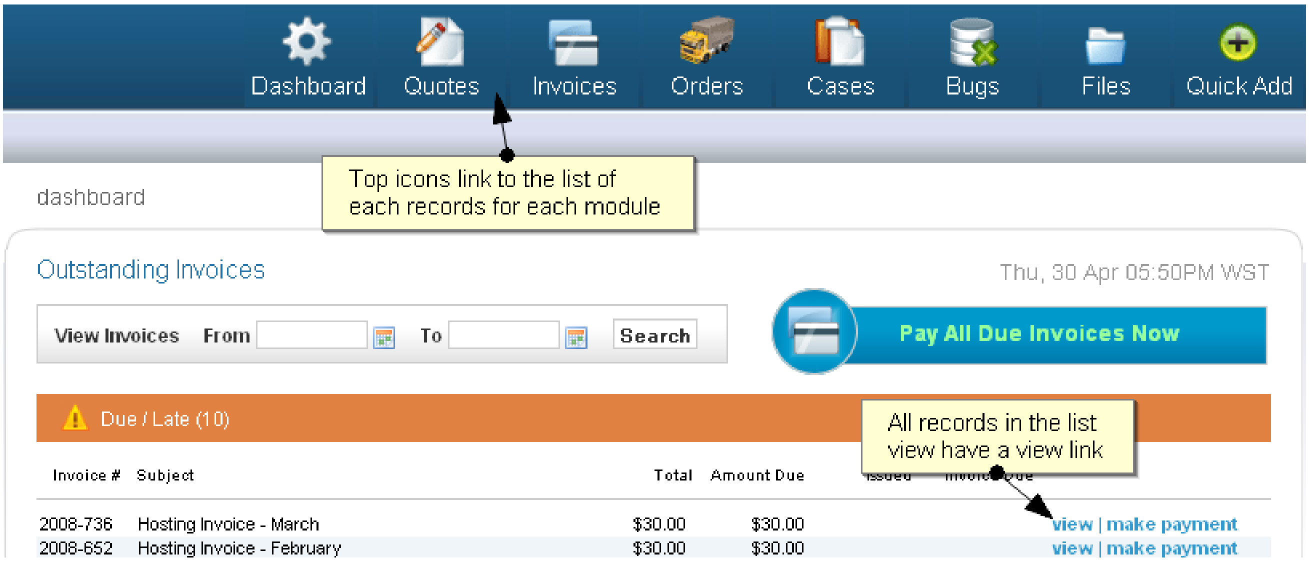
Note that all lists have a "view" option. Clicking on this will display a popup that contains more detailed information about the record.

If the record that is being viewed is a case or software bug, the customer is shown a screen that allows adding of notes and attachments to the record as shown below. The case subject and description can't be edited directly once created to ensure a valid audit trail.



Financial History & Payment of Invoices

The customer portal allows the customer to view all invoices and payments for their account as well as pay outstanding invoices. In order to view the financial history, the customer should click on the "Invoices" link on the top panel as shown below.



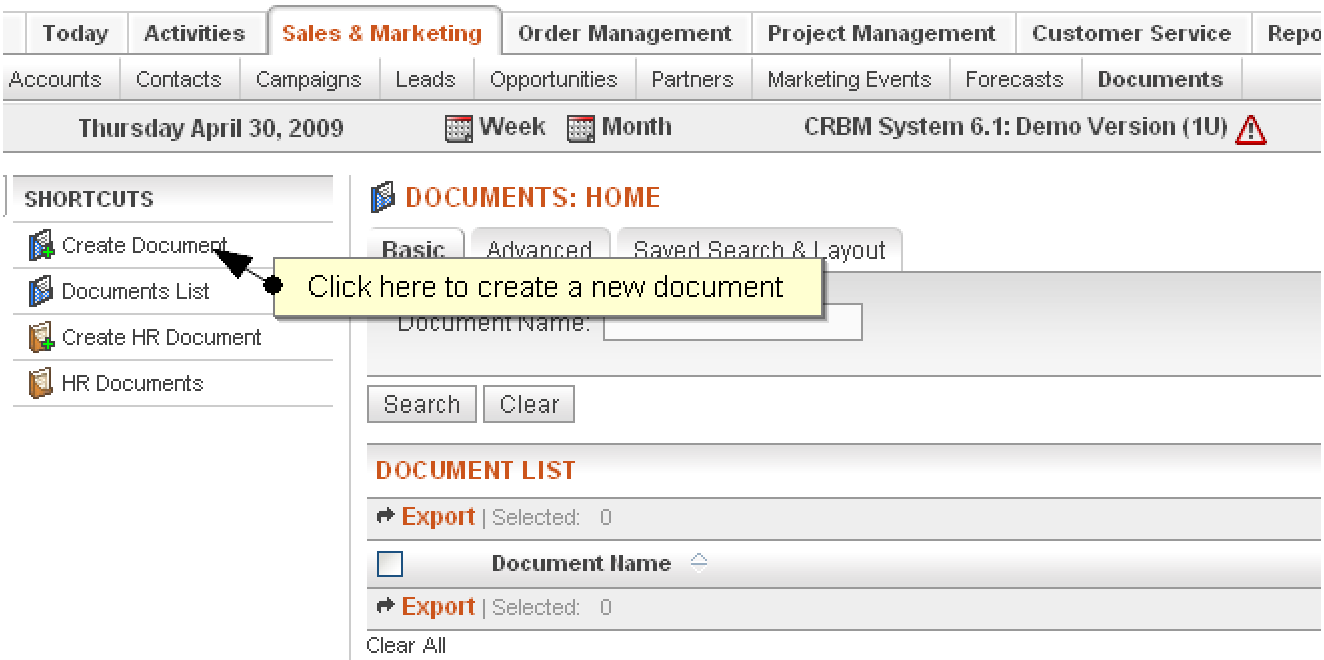
Once in the invoice listing, the system displays all outstanding invoices with the option of paying those invoices (only if the payment gateway is enabled).

In order to pay outstanding invoices, the custom clicks on "Pay All Due Invoices Now" and transitions to the payment screen below. From here, the customer enters their credit card details and submits a payment. If successful, the system logs the payments within the CRM, marks the related invoices as paid and sends a confirmation email to the customer.

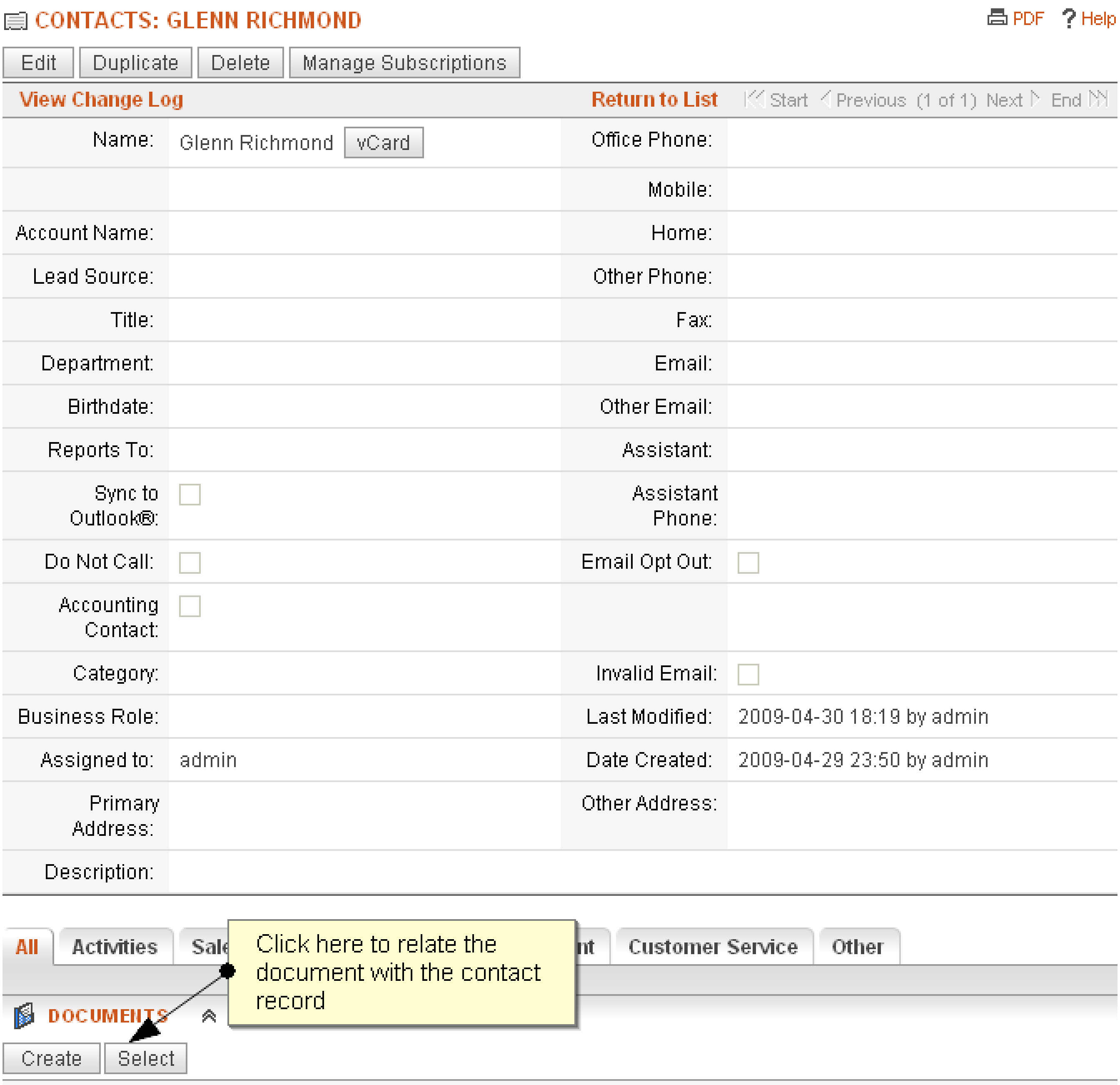
Sharing Files with Customer

In order to share files with customers, this is achieved by:

1) Creating a document with the CRM under the Documents module as shown below.



2) Once the document has been created, associate it with either the customer's contact or account record to have it appear in the portal. If you relate it to the contact record, only that contact will be able to see the document whereas if you relate it to the account, all contacts under that account will be able to see the document.



Index