

USER MANUAL



PortalNest DynamicsCRM Customer Portal

Version: 1.0

Dynamics CRM Compatibility:

Dynamics CRM 2016 on-premise (v8.0) and above
Dynamics 365 (v9.0) and above
(Available in Sales, Customer Service, Field Service,
Project Service)

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Introduction

PortalNest – Customer Portal for DynamicsCRM is a self-service customer portal solution that is a non-CMS front end framework and DynamicsCRM as the backend system powering the portal and all its data. As your portal customers get a dedicated dashboard, they can get access to and update all relevant data of accounts, contacts, appointments, calls, cases, etc from your DynamicsCRM system. It will simplify and reduce your task of communicating with your customers through other means.

Benefits of PortalNest Customer Portal

Being a proud customer of DynamicsCRM, you can now manage your customers better by using customer portal. The DynamicsCRM Customer Portal provides you the following benefits:

- Interactive Dashboard with recent records
- Create portal user groups and assign accessible roles for each module
- Sign-up directly from the portal, which will also create a contact record in DynamicsCRM
- Case commenting option
- Calendar view for all scheduled activities.
- Download Quotes from Portal in PDF format.
- Global search across all module.
- Download Quotes, Invoices and Contracts from Portal in PDF format.
- Access of knowledge Base module.

Prerequisites

Following points must be followed before starting Installation.

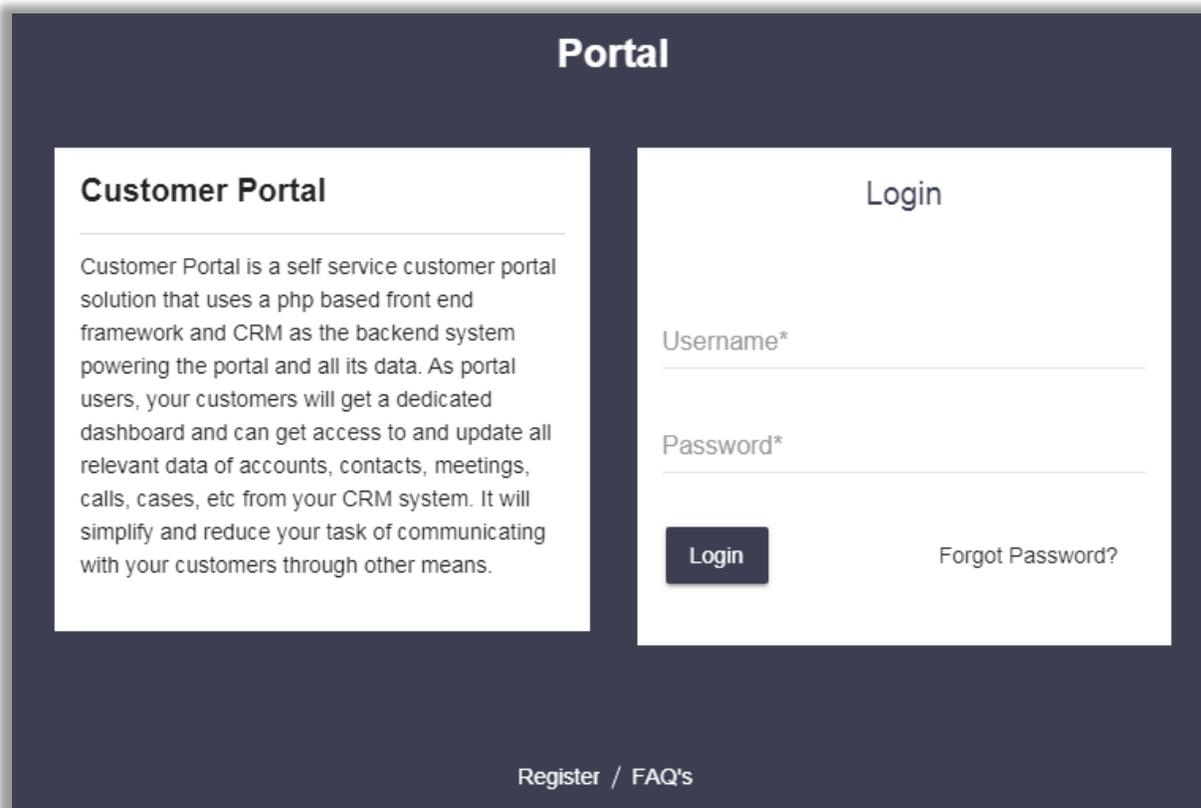
- You should login as an Administrator in DynamicsCRM.
- Check that your DynamicsCRM Instance is compatible for Customer Portal.
- If you are installing Customer Portal, make sure that there isn't any older version of Customer Portal Plug-in already installed on DynamicsCRM. If there is any then you should have to uninstall that plug-in first.

Manual

After completing all configurations at Portal admin and CRM for PortalNest plug-in, Customer can sign-up or login to Customer Portal and access CRM modules as the assigned Portal user group.

Login:

- Directly login to the portal using your portal credentials.



Sign Up:

- A new customer can directly sign-up from the Portal. The credentials will be verified to check whether any customer has been registered with same username and email address. If any such customer does not exist in the system, a customer is created in portal as well as in CRM Contacts module.

Portal

Customer Portal

Customer Portal is a self service customer portal solution that uses a php based front end framework and CRM as the backend system powering the portal and all its data. As portal users, your customers will get a dedicated dashboard and can get access to and update all relevant data of accounts, contacts, meetings, calls, cases, etc from your CRM system. It will simplify and reduce your task of communicating with your customers through other means.

Registration

Username * Password *

Last Name * First Name

Office Phone Mobile

Fax Title

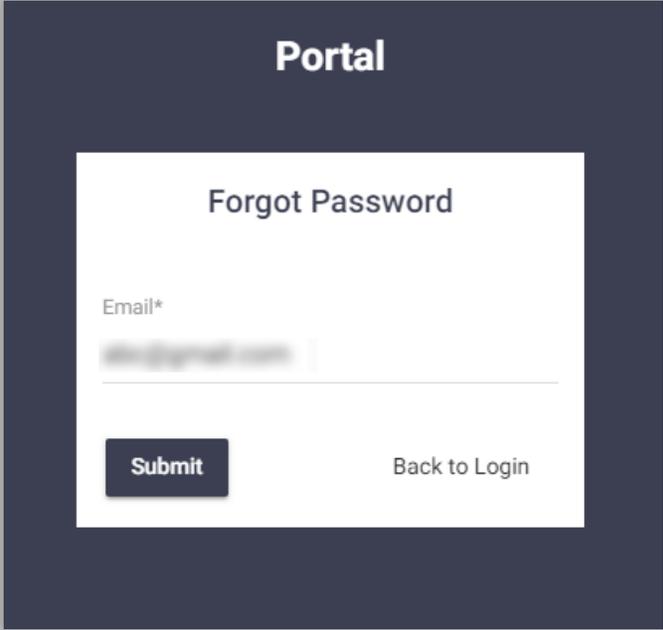
Email Address * Primary Address Street

Registration Back to login

- After successful registration, customer will be redirected to the login page. Now customer can login to portal with their Username and Password.

Forgot Password:

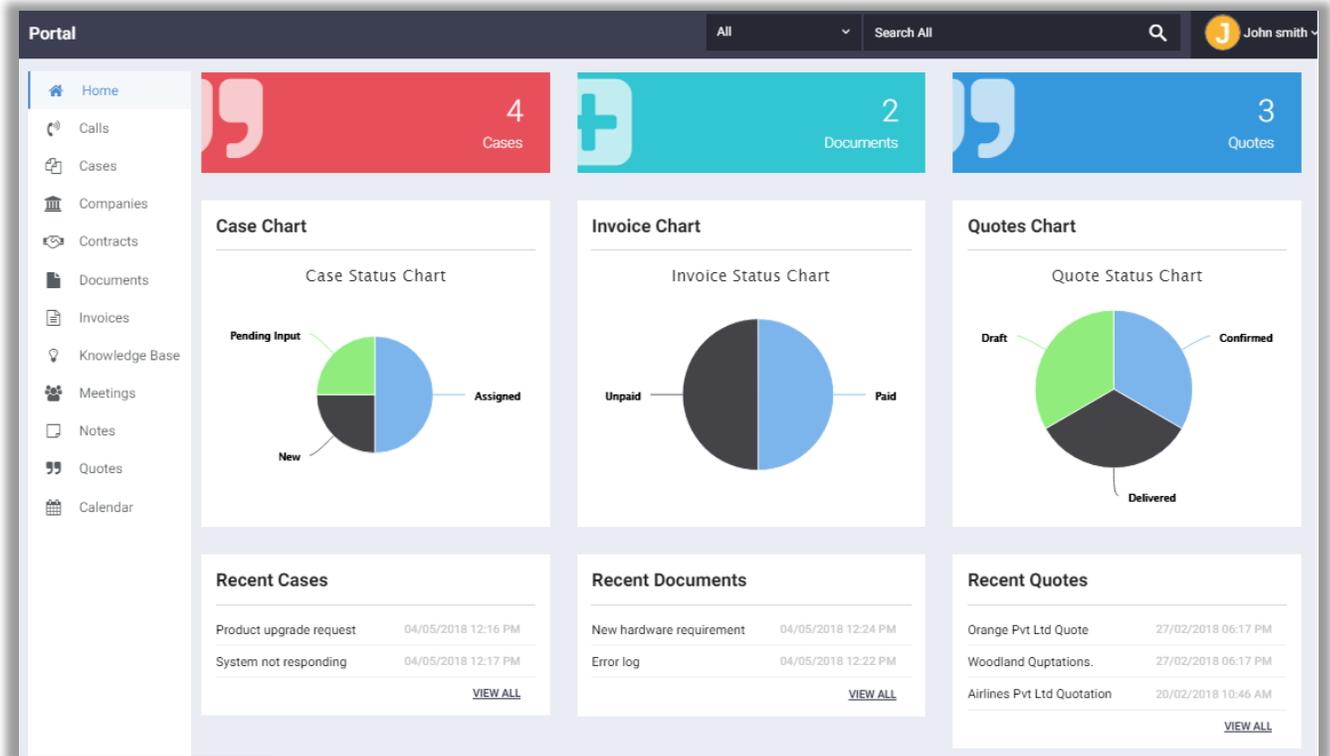
- Portal customer can retrieve their login password using the '**Forgot Password**' Option. Click on '**Forgot Password**' option and enter your username and email address. Click on '**Submit**' button and you will receive your password on your email.



The screenshot shows a dark blue header with the word "Portal" in white. Below the header is a white rectangular form titled "Forgot Password". Inside the form, there is a label "Email*" followed by a text input field containing the email address "m.d@gmail.com". At the bottom of the form, there are two buttons: a dark blue "Submit" button and a "Back to Login" link.

Portal Dashboard:

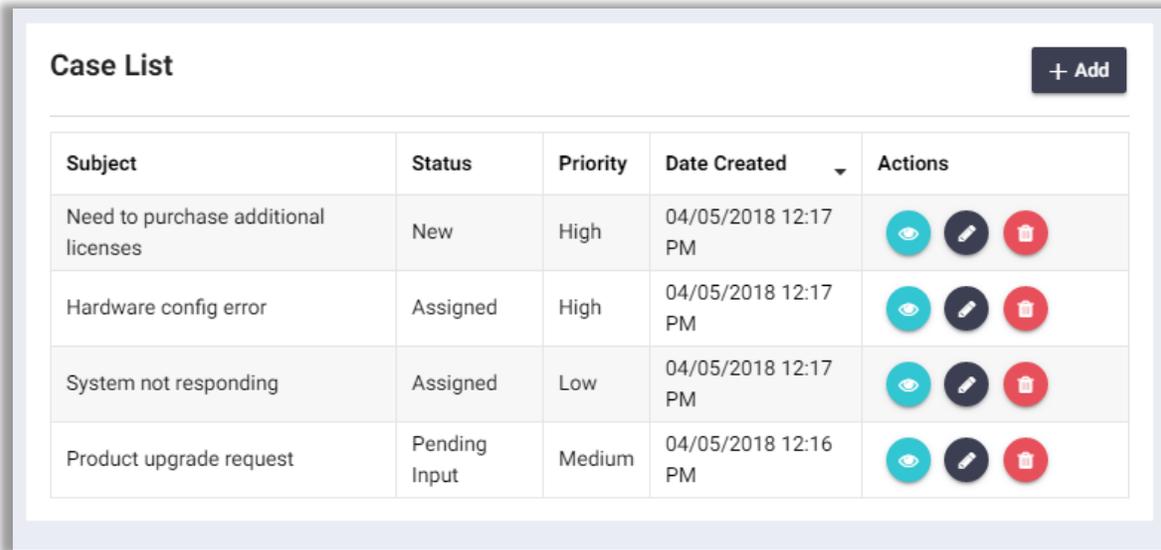
- Quickly track top modules counter. Portal Admin can set the accessibility to recently added records for portal customers. Accordingly, those modules with their recent records will be displayed on the dashboard.



- It will also display charts for cases, invoices and quotes module to view their status.
- You can also search globally from the portal or can select module from drop down to search from any specific module.
- Dashboard includes recent activities and today's schedule for viewing your whole day schedule.

List View:

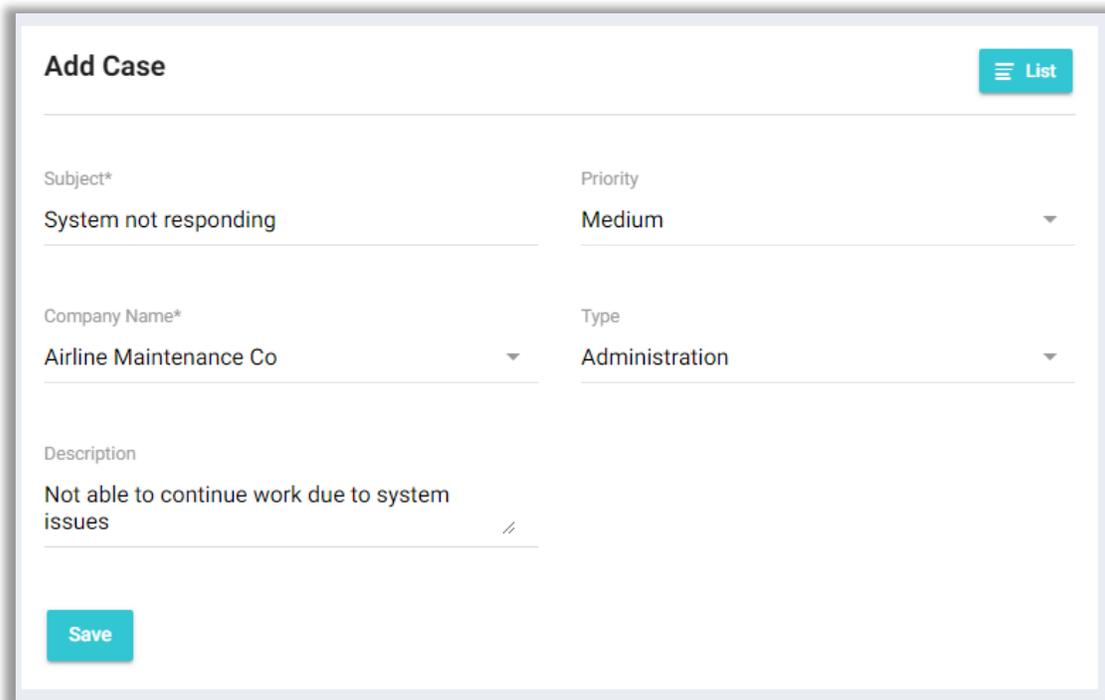
- Navigate to any module and you will be able to see the list of records of that module. You can search a record from the list view, delete it or update it.
- You can also add a new record to that module. To add a new record, click on the 'Add' button.



Subject	Status	Priority	Date Created	Actions
Need to purchase additional licenses	New	High	04/05/2018 12:17 PM	  
Hardware config error	Assigned	High	04/05/2018 12:17 PM	  
System not responding	Assigned	Low	04/05/2018 12:17 PM	  
Product upgrade request	Pending Input	Medium	04/05/2018 12:16 PM	  

Add Record:

- Add a new record in a module from the portal and it will get reflected in the CRM.



Add Case List

Subject* Priority

Company Name* Type

Description

Save

Detail Page:

- Click on the 'View' button from the List View and view the details of a record. You can edit that record or delete it from the detail view.

View Case

[Edit](#) [Delete](#)

Subject : Need to purchase additional licenses **Company Name :** Airline Maintenance Co

Type : - **Description :** Need to purchase additional licenses

Comments

 **Administrator** 11/05/2018 02:02 PM

Do you require quote

Add Comments *

[Add Comment](#)

Note

 Yes, We do require quote

Add Your Note

Subject * Attachment

Proposal [Add Attachment](#) 

Note Description

Want to provide you our actual requirement and ideas

[Add Note](#)

Calendar Page:

- View Calls and Appointments from the calendar for a particular date. It is an easy way to checkout daily, weekly or monthly schedules.

Calendar

<
>
TODAY
May 2018
MONTH
WEEK
DAY
LIST

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3 11:45 AM Contr	4 8:30 AM Follow 10:45 AM Get m 8:30 PM Query r	5 3 AM New prod 5 AM Requireme
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Calls : ● Meetings : ●

View Quotes, Invoices and Contracts:

- Download Quotes, Invoices and Contracts added by admin from CRM side in Portal.

Quotes List					
Title	Company	Quote Stage	Grand Total	Date Created↓	Actions
Orange Pvt Ltd Quote	Airline Maintenance Co	Delivered	0.00	27/02/2018 06:17 PM	 

- To download the PDF version of Quotes, Invoices or Contracts click on the download icon under 'Actions' column.
- You can also view details of that particular modules.

View Quotes [Download Attachment](#)

Title : Airlines Pvt Ltd Quotation	Payment Terms : Nett 15
Quote Number : 3	Quote Stage : Confirmed
Valid Until : 20/03/2018	Invoice Status : Invoiced
Approval Status : Approved	Approval Issues : -
Billing Street : -	Shipping Street : -
Currency id : US Dollars : \$	Shipping : 0.00
Discount : -0.77	Shipping Tax : 0%
Tax : 0.00	Subtotal : 61.73
Total : 62.50	Grand Total : 61.73

Group(s) Details

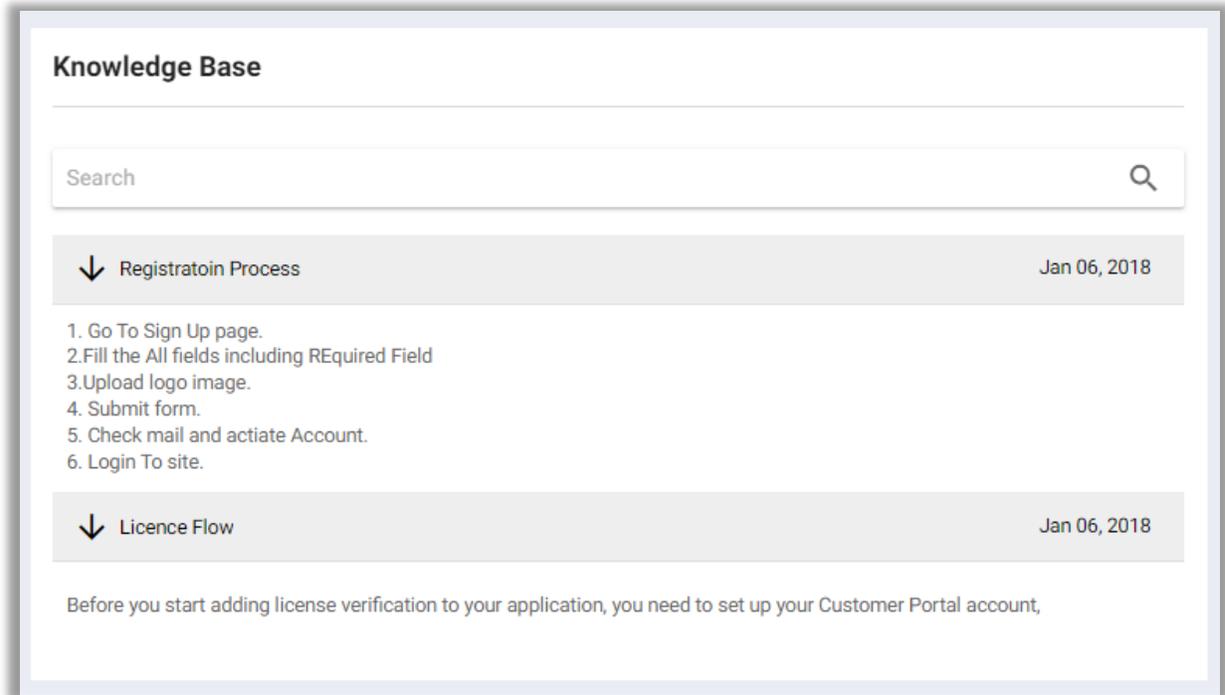
Group Name : item 1								
No	Quantity	Product/Service	List	Discount	Sale Price	Tax	Tax Amount	Total
1	1.25	p1	\$50.00	1.23%	\$49.39	0.00%	\$0.00	\$61.73

Total :	\$62.50
Discount :	\$-0.77
Subtotal :	\$61.73
Tax :	\$0.00
Grand Total :	\$61.73

Note: This cannot be changed again from the portal.

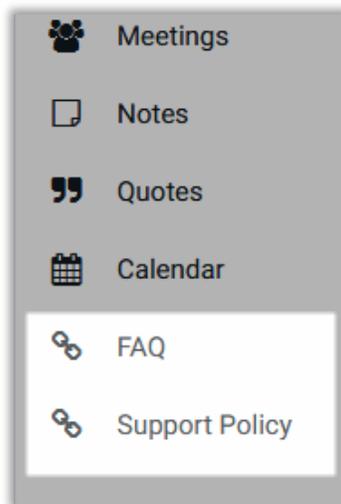
Knowledge Base:

- Access the Knowledge Base module of CRM from portal to view question and answers based on category.



Module Menu:

- If there are any external link of manage page link set from admin, they will be listed in module menu after listing of CRM modules.



Contact Us

We simplify your business, offer unique business solution in digital web and IT landscapes.



Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: <https://www.crmjetty.com/dynamicscrm-portalnest-customer-portal.htm> and click on the Live Chat button for instant support.



Tickets

- Raise tickets for your specific question!
- Send an email to support@crmjetty.com or you can login to your account @ www.crmjetty.com and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

Customization:

If you would like to customize or discuss about additional feature for PortalNest DynamicsCRM Customer Portal, please write to sales@crmjetty.com