USER MANUAL

Dynamics CRM Customer Portal for WordPress

Version: 3.0

WordPress Compatibility:

WordPress: From 4.0 to 5.2.2

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

This 'Dynamics CRM Customer Portal' plugin will help your customers to use several Dynamics CRM modules in their WP interface, which you can define from your admin front. The plugin integrates CRM modules to your WP customer interface.

It will simplify and reduce your task of communicating with your WP customers through any other means. Your customers would be able to update all the above modules on their own.

Benefits of Customer Portal

Being a proud user of Dynamics CRM, you can now manage your WordPress customers better by integrating Dynamics CRM and WordPress platforms and connecting your WP users with your Dynamics CRM system. The Dynamics CRM Customer Portal will provide you the following benefits:

- Interactive Dashboard with recent records and quick access icons
- Assign accessible roles for each module
- Sign-up directly from the portal, which will also create a contact record in Dynamics CRM
- Attach files as notes in case module
- Calendar view for all scheduled activities
- View all updated data reflected in your Dynamics CRM dashboard whenever your customers make any update from the portal.

Prerequisites

Following points must be followed before starting Installation.

- You should login as an Administrator in Dynamics CRM.
- Check that your Dynamics CRM instance is compatible for Customer Portal.
- You will require a Product License Key to activate the Plugin. To obtain the License Key just drop us a mail @ support@crmjetty.com along with your Domain Name.
- If you are installing Customer Portal, then make sure there should not be any other Customer Portal already installed on Dynamics CRM. If there is any then you should have to uninstall that plug-in first.
- If you are having same portal's older version than upgrade it.
- Check your WordPress portal has compatibility with Customer Portal.
- You should be able to login as an admin in your WordPress portal site.

Installation

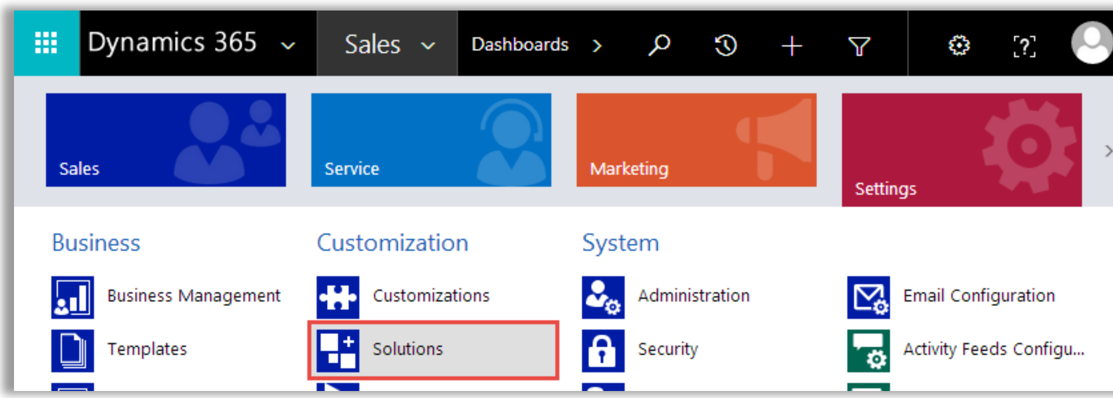
Dynamics CRM Plug-in Installation

To install 'Dynamics CRM Customer Portal' plugin, the following steps has to be followed:

- On purchasing the plugin, you will get a zip file named **DynamicsCRM-Customer-Portal-v3.0.zip**

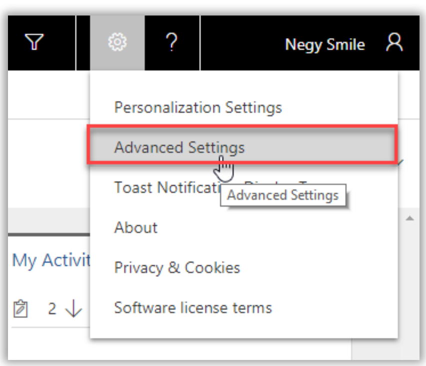
DynamicsCRM-Customer-Portal-v3.0.zip

- Login into your CRM Account and click on **settings ->solutions.**



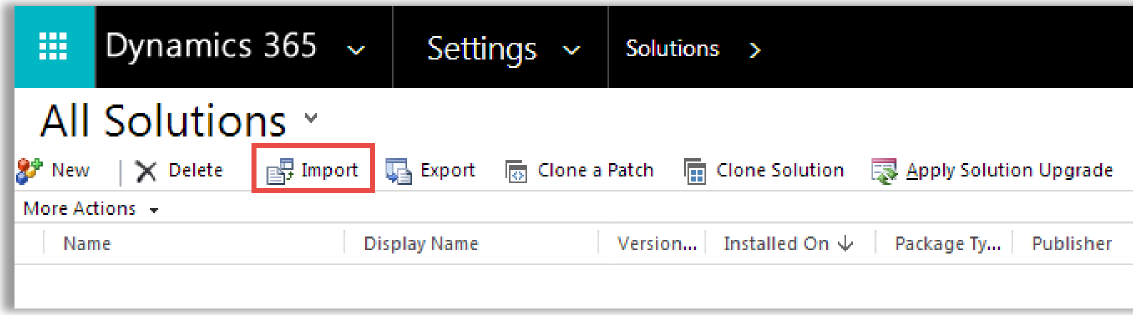
Or

- If you are in unified interface, click on Settings icon given on the right side of the title bar. Then click on Advance Settings.

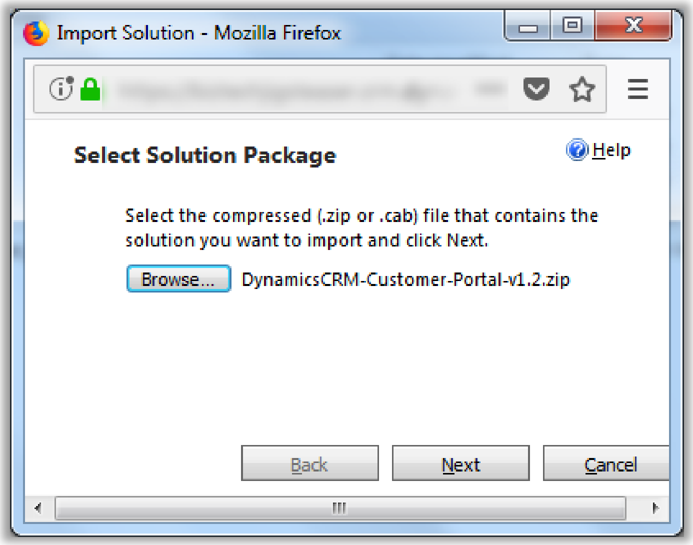


- Navigate to settings -> solution.

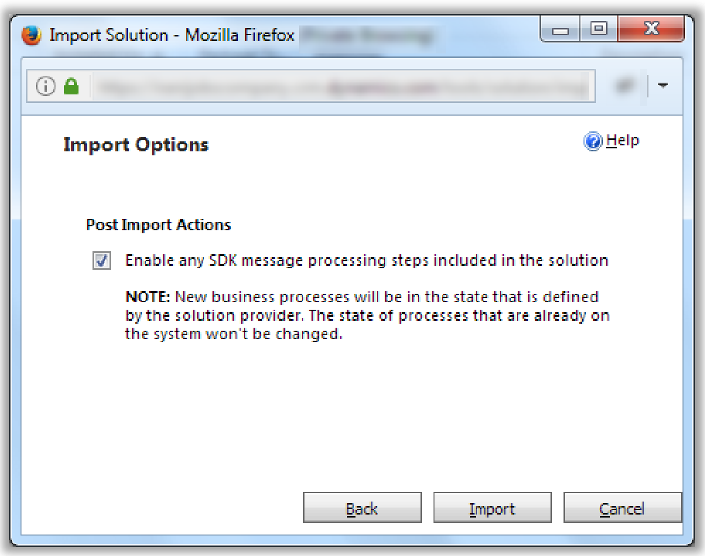
- Click on **'Import'** to upload and install the Solution.



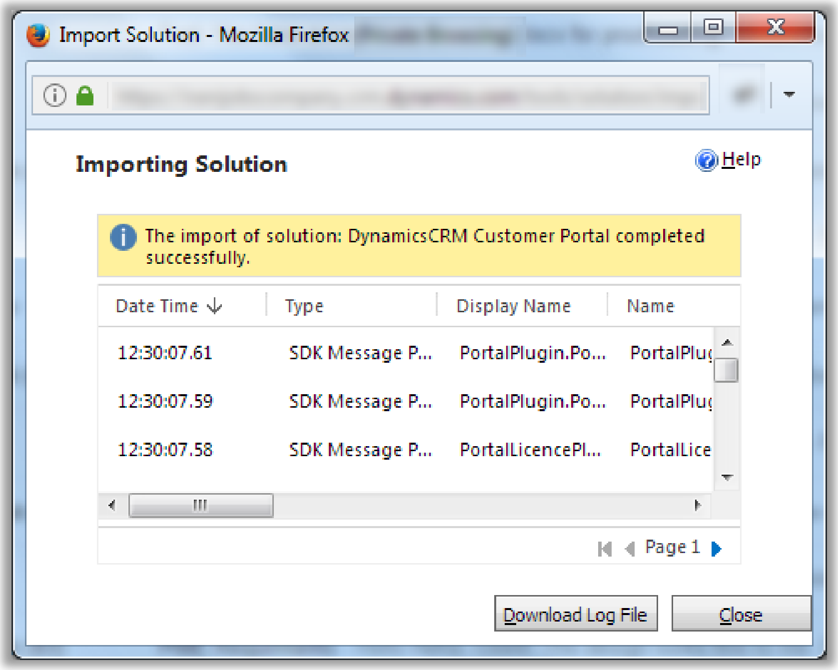
- Click on Browse button and choose the Package Zip File for Dynamics CRM Customer Portal from the Import Solution Window



- Click on **'Next'** for further processing.



- Check the box to enable any SDK message processing steps included in the solution and click on Import button to Import the Solution

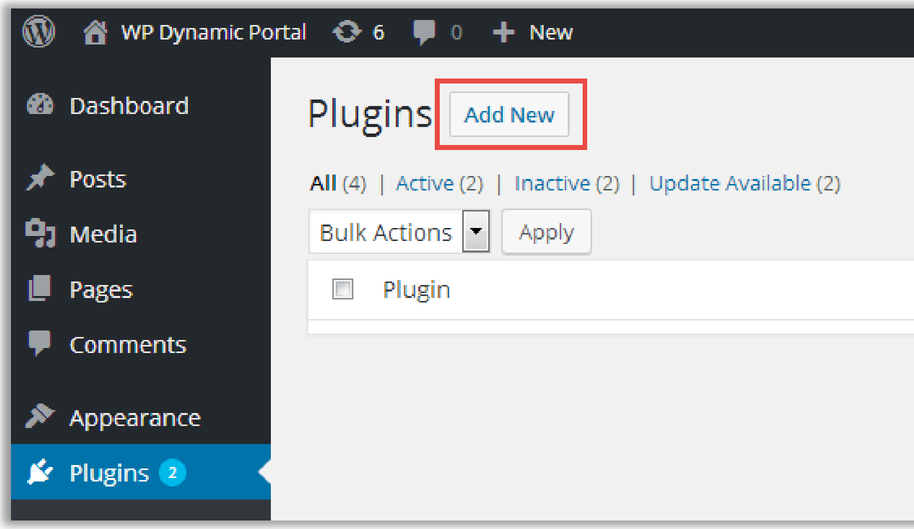


- Click on '**Close'** after successful completion message is displayed

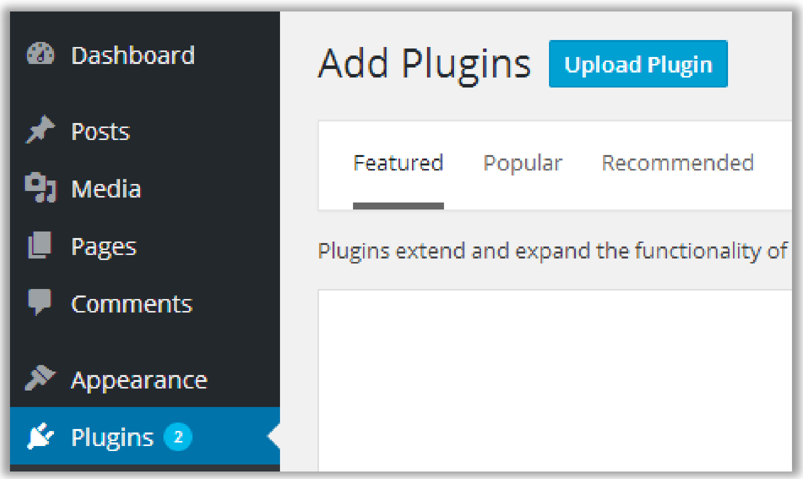
- Once you import the solution, it will be displayed in the solutions grid view

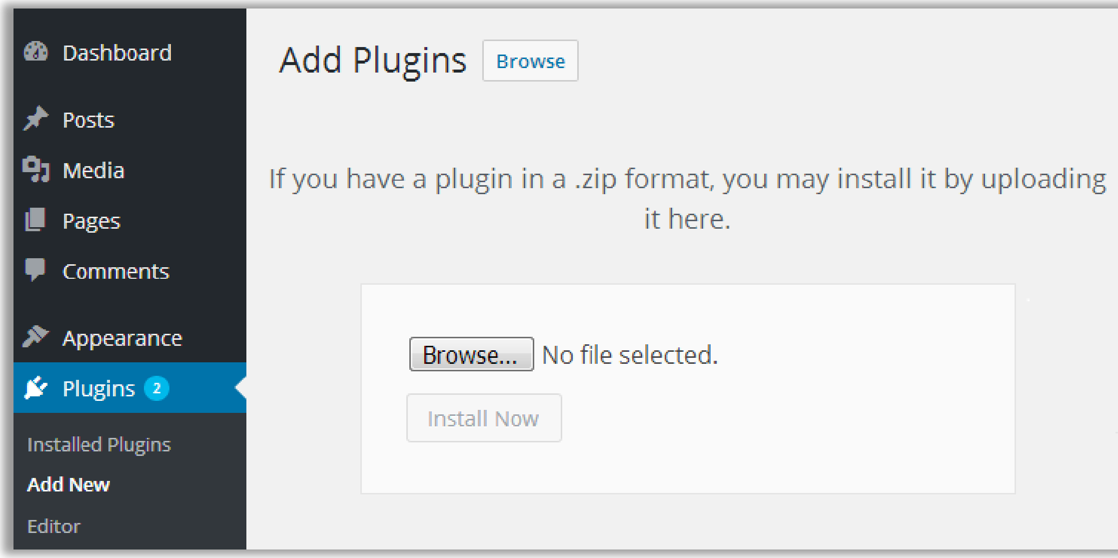
WordPress Manual Plug-in installation

- To start with the installation, Log-in as Administrator into WordPress. Hover over **'Plugins'** and click on **'Add New'** to install the package.

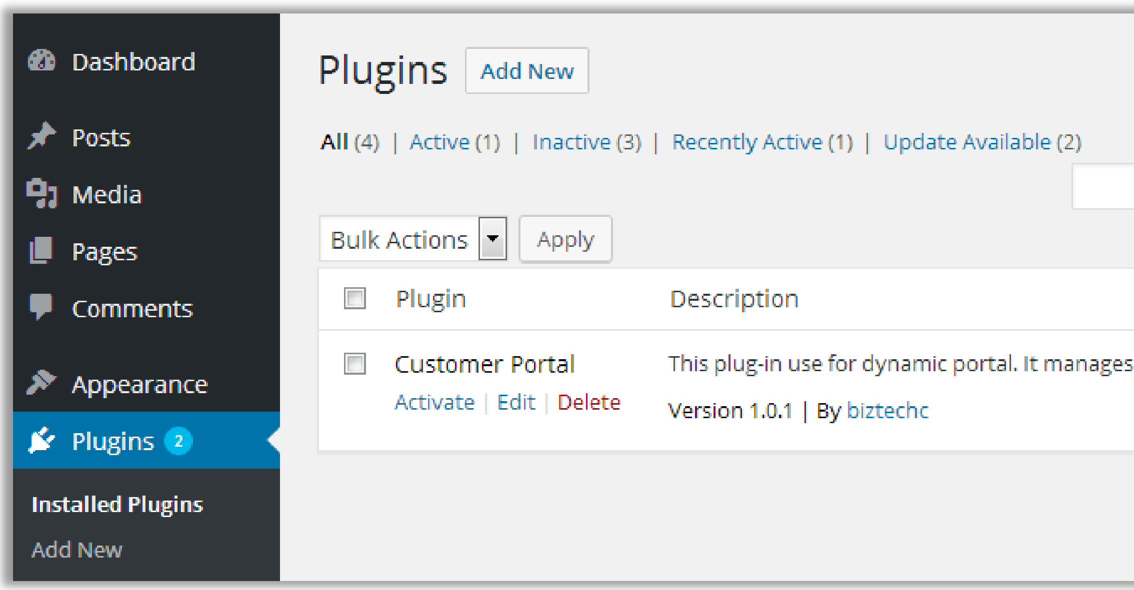


- To upload the plugin, click on **'Upload Plugin'** button.





- Now, click on **'Browse'** button and Browse the zip file. After uploading package, click on the **'Install Now'** button to install the package.
- Navigate to Installed plugins. Here, you can see Dynamics CRM Customer Portal Plugin was successfully installed. But still it's Inactive.
- Click on **'Activate'** to activate the plugin.



Plug-in Configuration

Dynamics CRM Configuration Settings

Get activation key

- Get the activation key from the Order Confirmation Mail. OR
- Login to your CRMJetty account then go to downloadable options and copy the activation key for the Dynamics CRM Customer Portal plug-in.

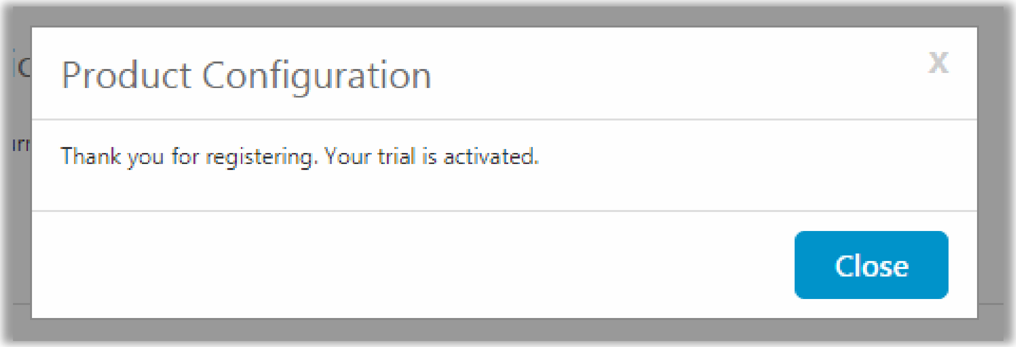
Note: Applicable only if purchased from CRMJetty.

Activate your plug-in

- Once you import the solution, it will be displayed in the solutions grid view.
- Double click on **'DynamicsCRM Customer Portal for WordPress'** solution to configure the plugin with your license key.
- This will open up a new window. Click on **'Configuration'** from the options provided on the left side.

- You can activate your one-month free trial.

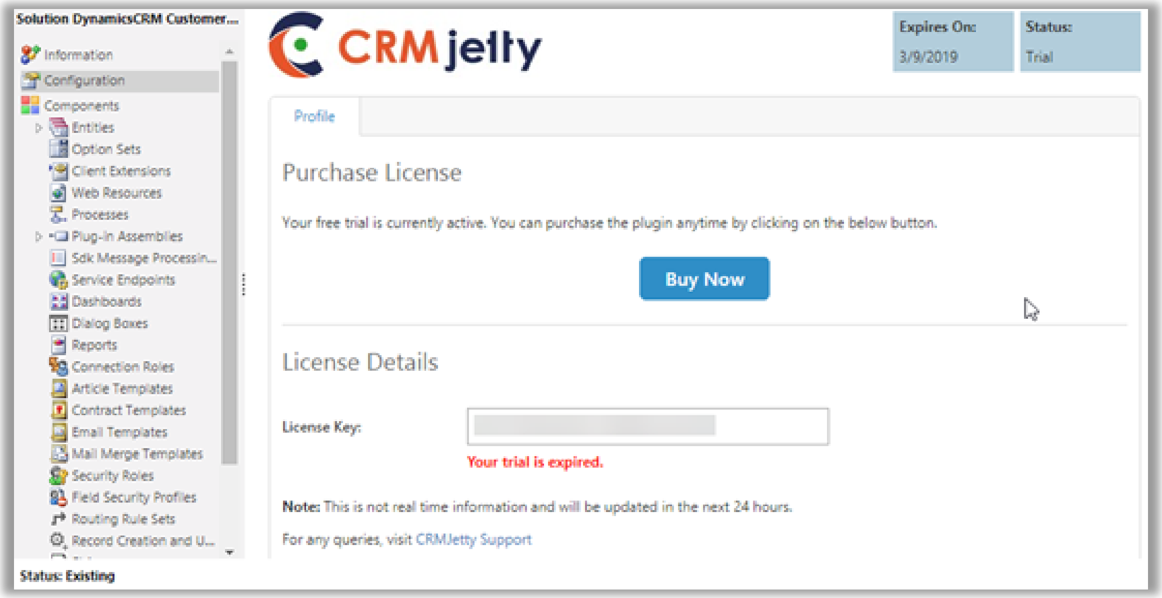
- To get a one-month free trial license key, fill out the details and click on **‘Activate’** button.



- Your trial will get activated and expiry date will be displayed on top.

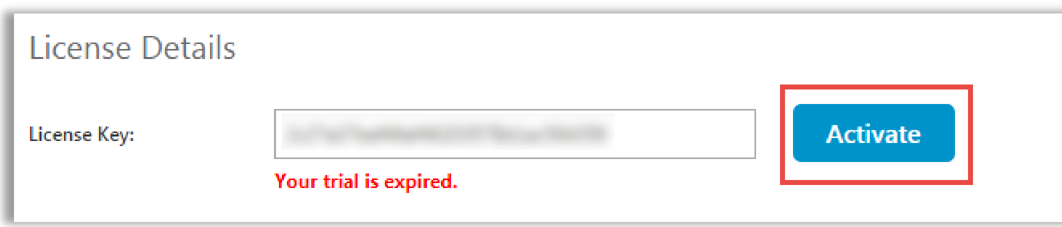
- You can purchase the licensed version any time. To purchase the license, click on **‘Buy Now’** button.

- On expiration of Trial a message will appear that the Trial is expired. Now to purchase the license click on **‘Buy Now’** button.



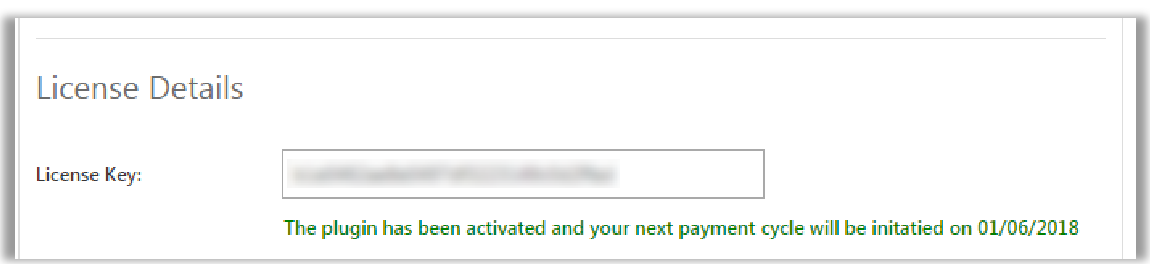
- This will redirect you to our product page. Click on **'Add to Cart'** button and complete the purchase process.

- On successfully completing the purchase process, you will receive your license key via email along with steps to complete the license configuration.

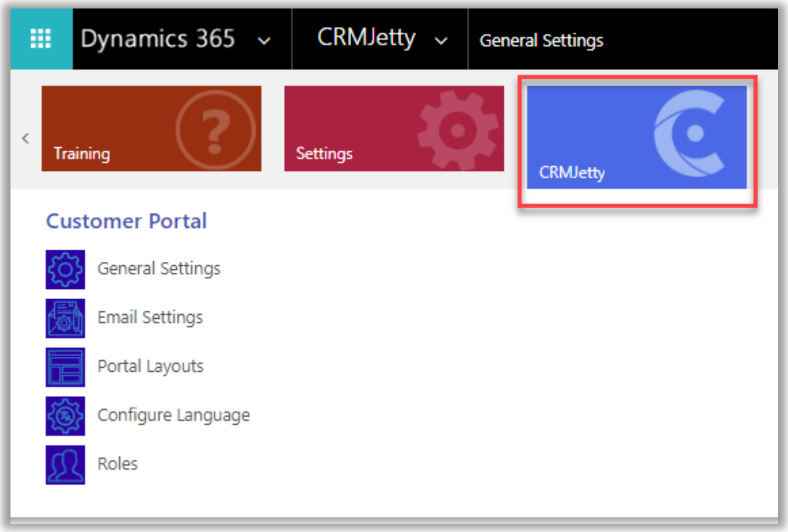


- Enter the New License key received on mail. This will enable the **'Activate'** button.

- Click on **'Activate'** button to activate your license.

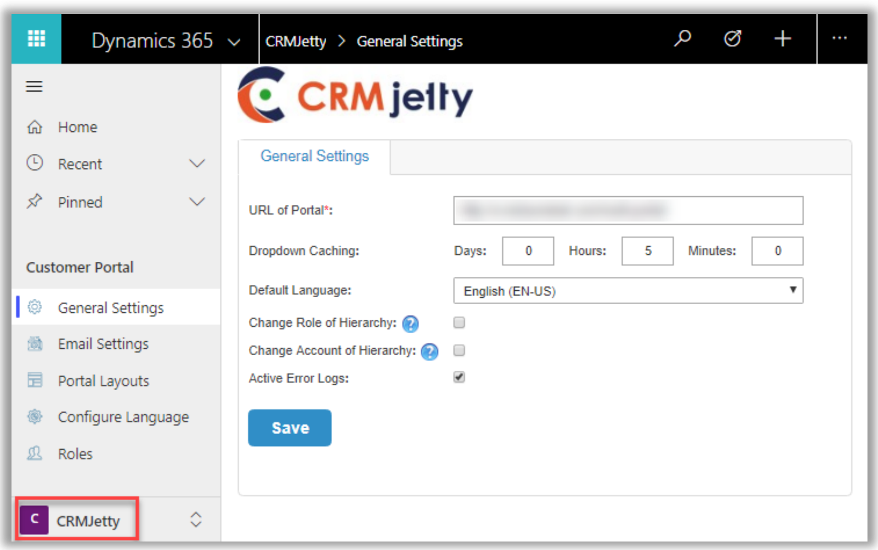


- Once the activation is successfully completed, navigate to the CRMJetty tile to access and setup various configuration for portal i.e. General Settings, Email Settings, Portal Layouts, Language Configuration and roles.



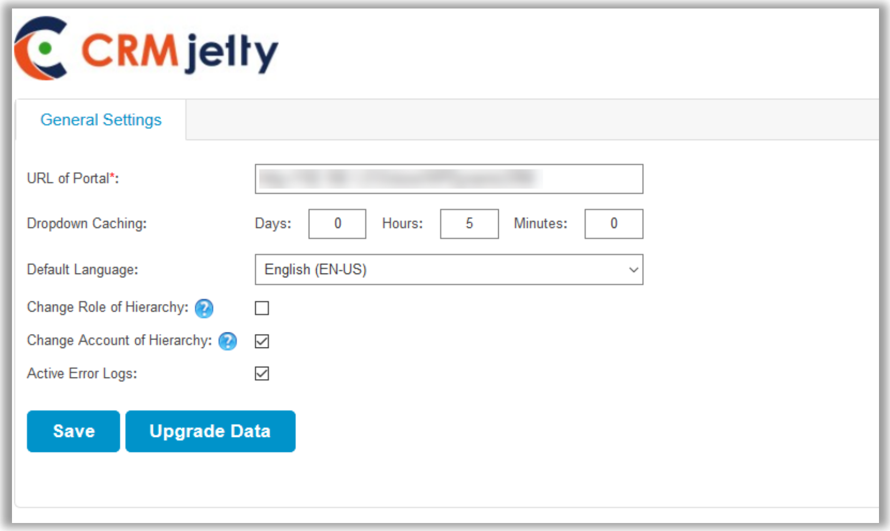
Or

- For unified interface, navigate to Dynamics 365 – Custom and from the bottom menu select CRMJetty.



Upgrade Data:

- To manage upgrades, we have upgrade specific flow wherein if you have any older version of Customer Portal then **'Upgrade Data'** button will get enabled.



- For upgrading data, navigate to '**CRMJetty -> General Configuration'** and click on **'Upgrade Data'** button.

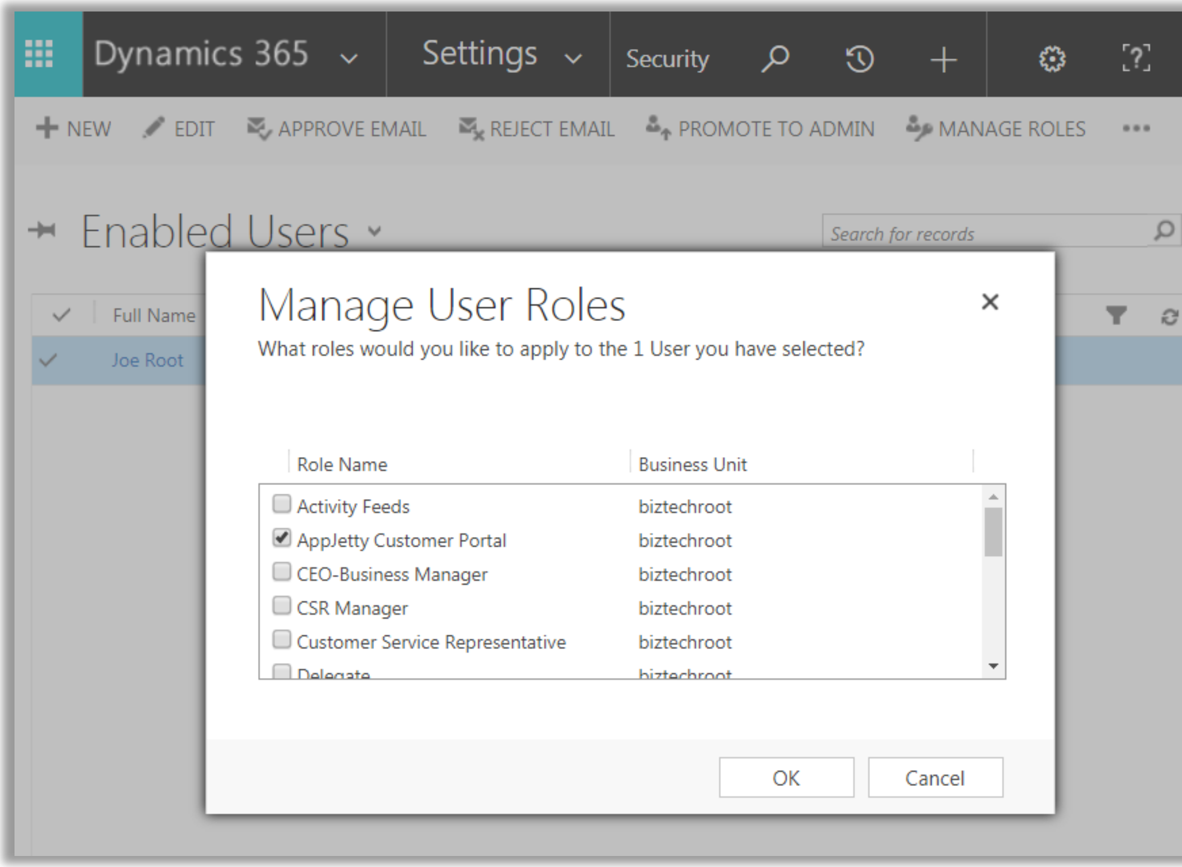
- By upgrading data, you can make your portal compatible with latest version of portal.

Assign User Role:

- To manage the user roles, navigate to **Settings -> Security -> Users.**

- Now select the users whose roles are to be managed and click on **'MANAGE ROLES'.** This will open up a pop up to select roles.

- To access CRMJetty product entities assign **'CRMJetty Customer Portal'** role to selected users.

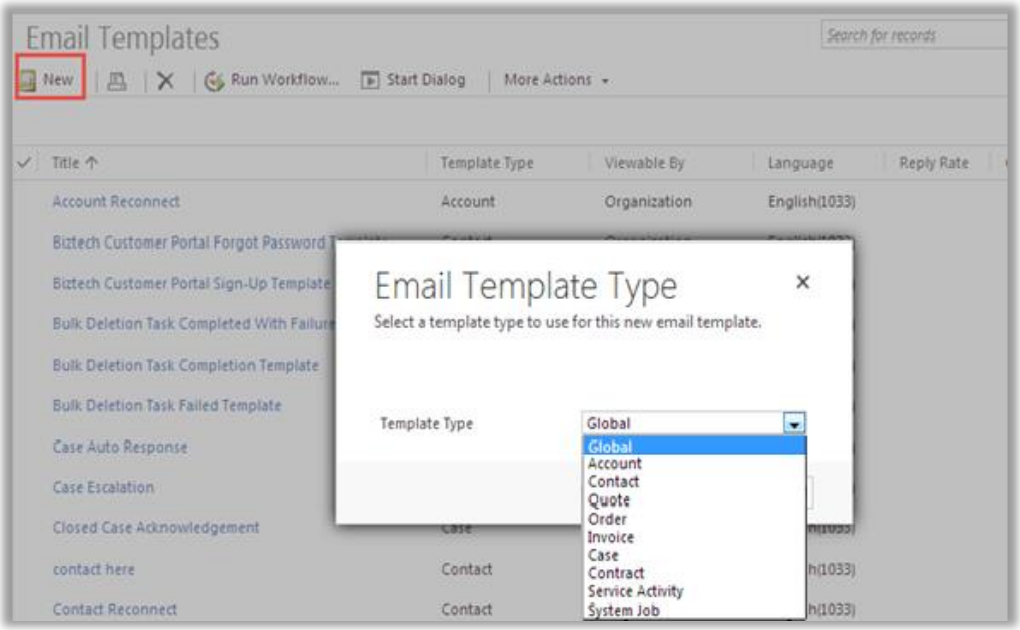


Note:

- **'System Administrator'** will also be able to access CRMJetty Product Entities.

Setting Email Template

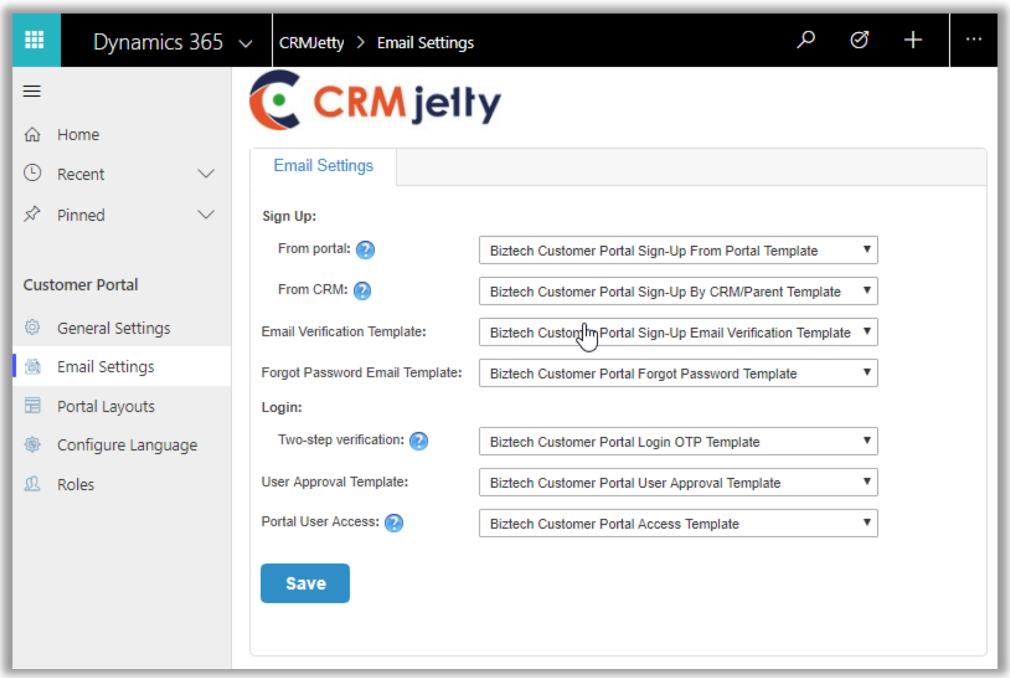
- Admin can create any email template like signup and forgot password template from CRM.
- From **"templates",** user gets option to create **"New"** template and also select template type.



- Select email template type as **"Contact"** and create an email template filling the necessary details as per your requirement.

Note: User can also assign default **"Email templates"** for various action performed.

- For assigning the default email template navigate to “**CRMJetty -> Email Settings**”.

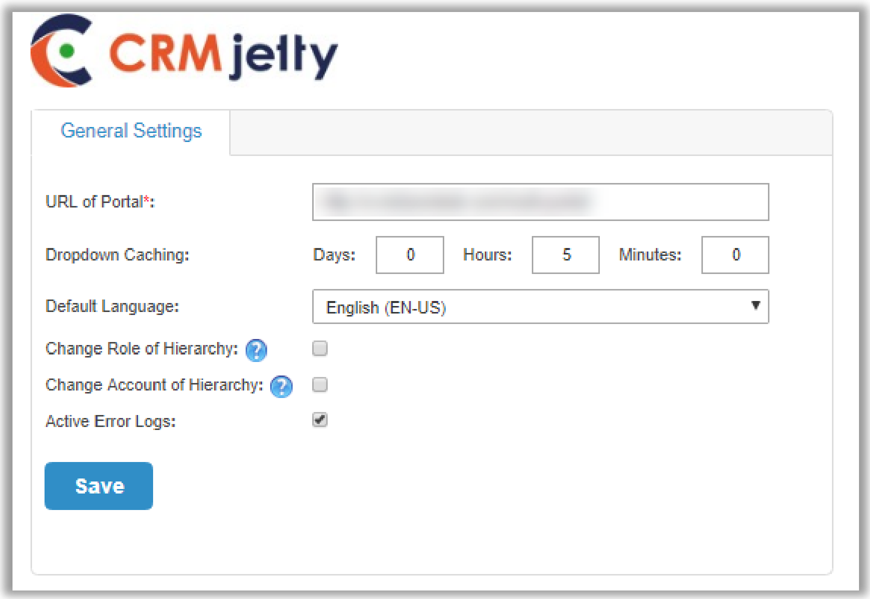


- Select appropriate email template and **“Save”** email settings.

Setting General Accessibility for Portal Users

- For general settings, navigate to CRMJetty from menu.

- Mention the URL of your WordPress Account (i.e. Portal URL) which will be sent along with the credentials' mail and click on **'Save'** button.



- Use Dropdown caching to set up values of Look up fields (Related to other modules). Values displayed in look up fields will remain old until it surpasses the time set here.

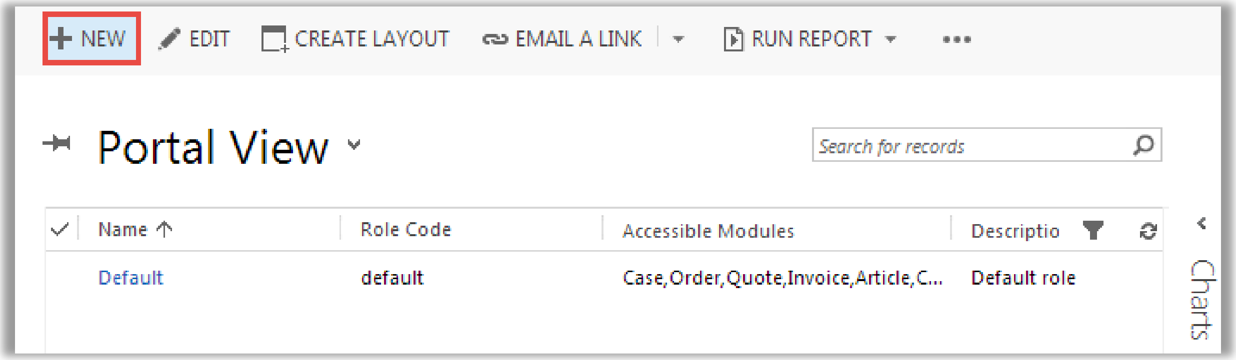
- By enabling the 'Change Role of Hierarchy' check box, you can change role of hierarchy i.e. If role of any contact is updated or removed, it will be applied to the whole child hierarchy.

- By enabling the 'Change Account of Hierarchy' check box, you can change account of hierarchy i.e. If account of any contact is updated or removed, it will be applied to the whole child hierarchy. If is it unticked, and account is updated then it will work as a separate entity from the hierarchy.

Setting Module Accessibility for Portal Users

- For setting access rights, navigate to CRMJetty from menu and select 'Roles' option.

- You can create Roles and assign accessible modules to that role. To create a role, click on **'Roles'** button. This will open up a page to add roles in a new window.

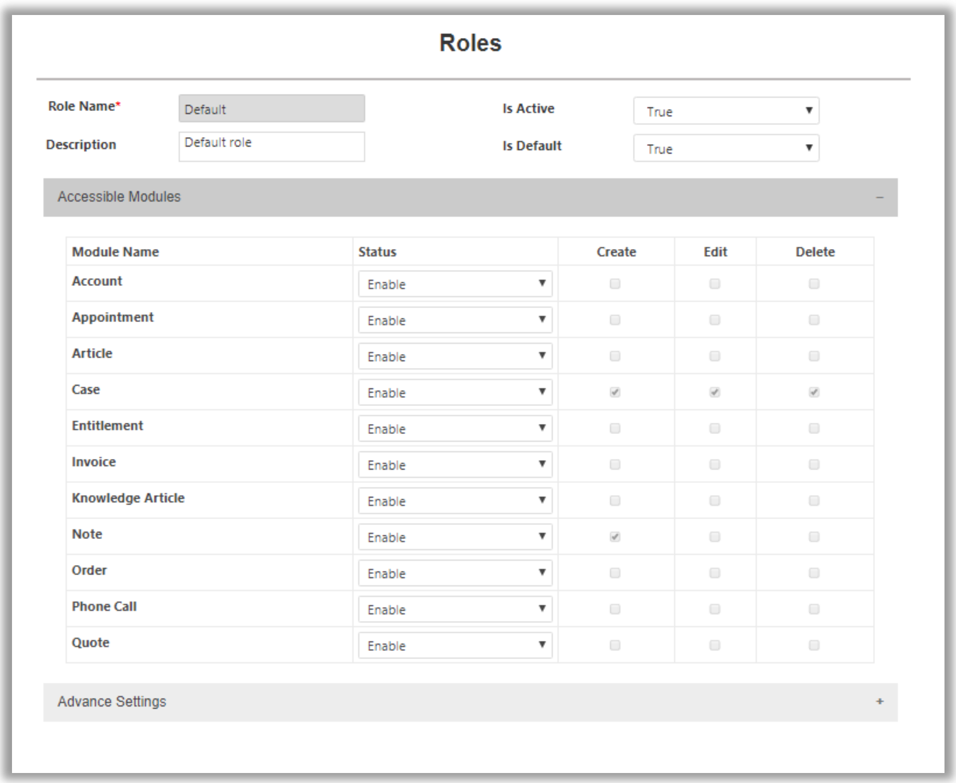


- There will be a Default Role already existing along with default layout; you can create a new role by clicking on the **'NEW'** button.

- Fill role details like Role name, Is Active, Description and Accessible Modules. Click **"Save"** to create the role.

- 'Role' is created, and modules are assigned to the role.

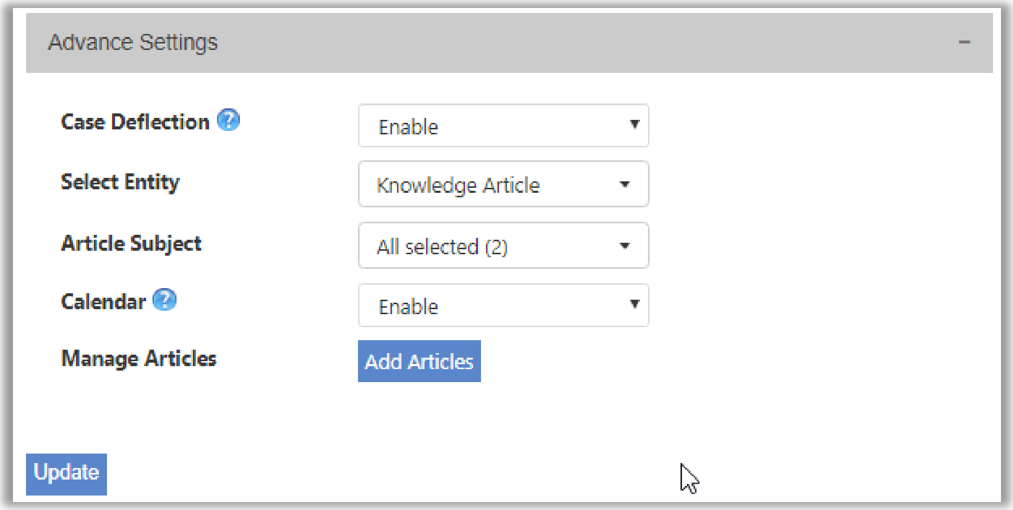
- To disable a module, select **'Disable'** option from the status dropdown. To provide dynamic access rights of **'Create', 'Edit'** or **'Delete'** check the boxes against the respective module.



Note: By default, **'Default'** group will be assigned to a newly created contact record.

Note: Access rights of default user group cannot be changed.

- You can also define advance configurations for different user groups for the features like case deflection and calendar accessibility.

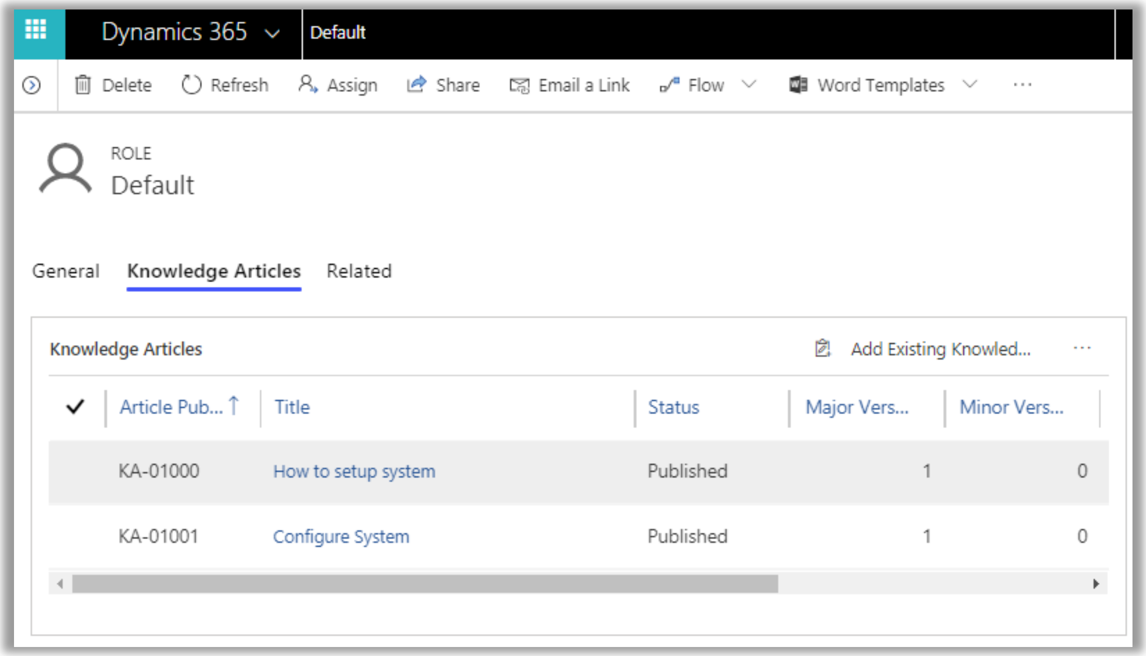


- While creating cases from portal, "Case deflection" feature helps your customers to find the probable solutions. If no relevant solutions are found, then customer can proceed ahead by adding a new case.

- It will search a solution for the enabled "Case Deflection subject" (which belongs to articles or Knowledge articles categories of CRM). So, on enabling "Case deflection" option, you will be setting entity and respective categories to be searched from; while the portal user looks for a solution.

Note: Case Deflection will only work if Articles or Knowledge Articles module is enabled and Category is selected.

- For adding articles either for article entity or knowledge article entity navigate to role page and click on **'Add Article'** button.



- Add existing article to this user group and it will get visible on portal side.

Note: For adding data from article entity, you need to switch to classic interface.

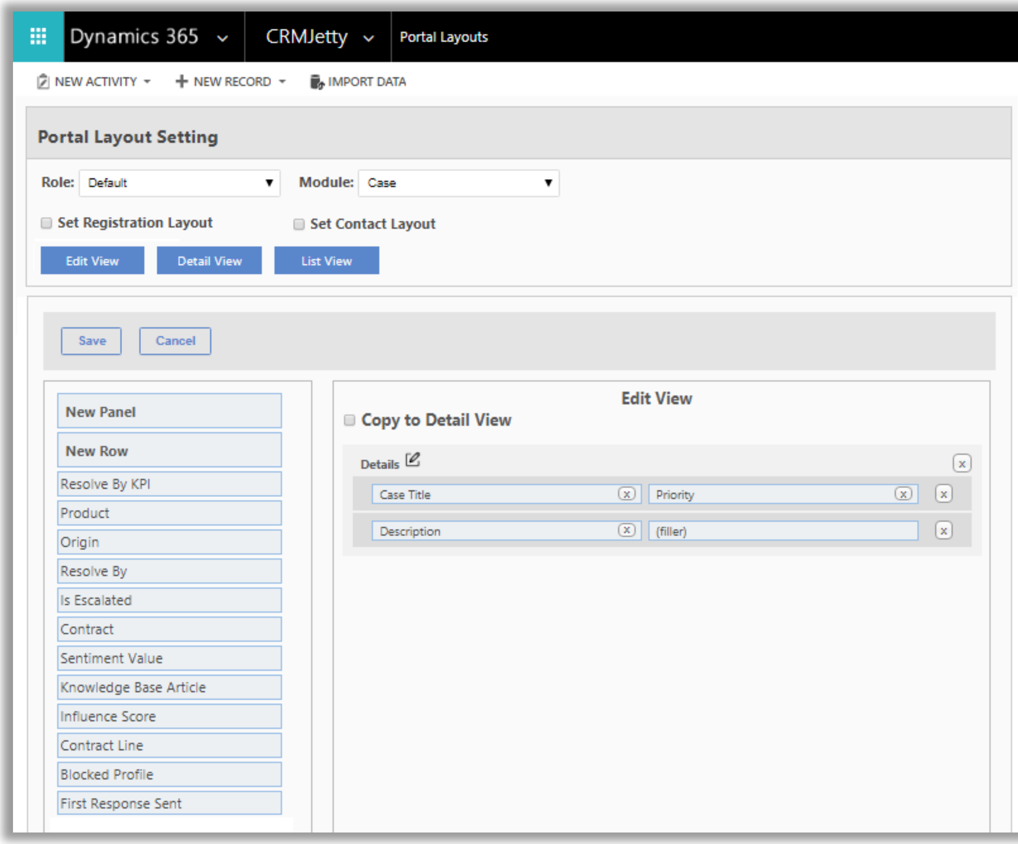
- You can also enable calendar for specific user groups.

Note: Calendar can only be enabled if Phone Calls or Appointments module is enabled.

Setting Portal Layout

- Customer portal provides feature to manage Dynamics CRM Module's accessibility for their WordPress portal users. You can decide access of which module should be provided to which Customer by creating a role and assigning modules to that role.

- To avail Dynamics CRM modules into your WordPress portal, it is mandatory to set Portal Layouts for each accessible module. Customer Portal plug-in provides facility to set Portal Layouts for Dynamics CRM modules.

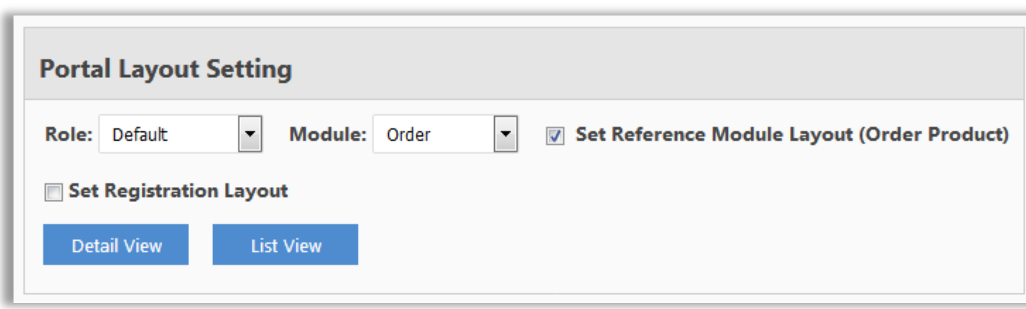


- To set Portal layouts click on **'Portal Layout'** button. This will open up Portal Layout Settings Page in a new window.

- Select a role from the Select Roles dropdown menu and select your desired Module for layout setting from the dropdown.

- Set layouts for Edit view, Detail view and List view. Drag and drop fields from left column to the right. After populating the layout, click on **'Save'** button to save the layout.

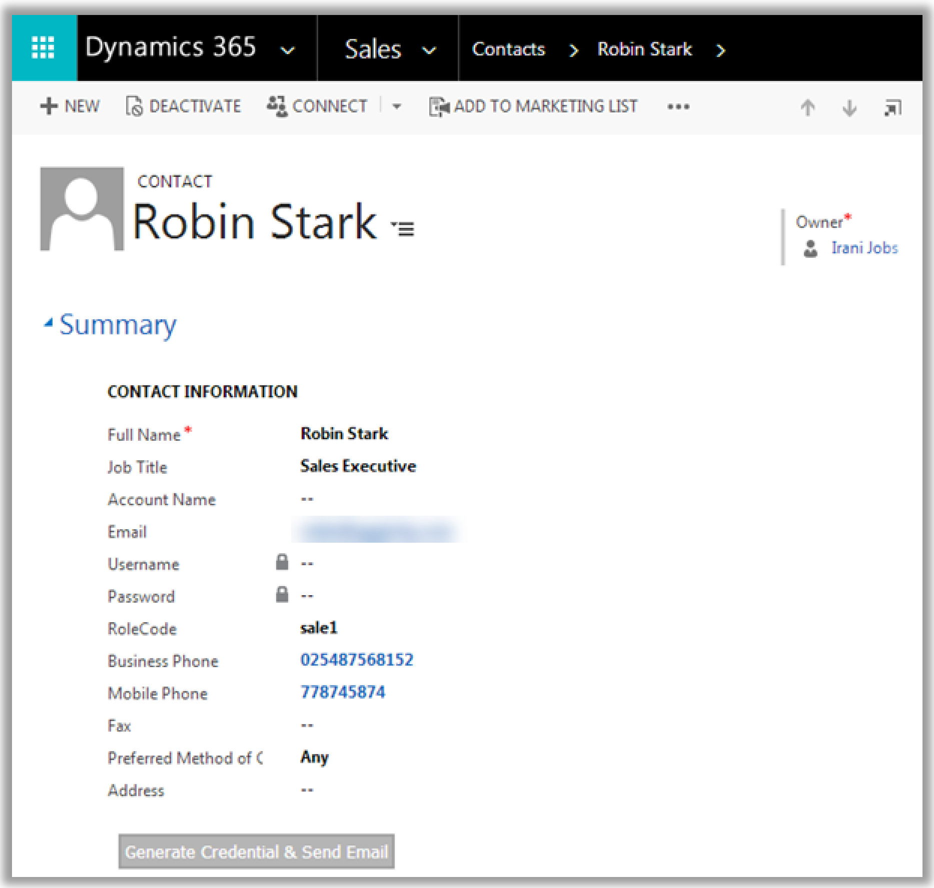
- You can also select **'Set Contact Layout'** which will allow you to design child layout (i.e. Sub contact layout) template for **'Edit view and Detail view'**.



- You can also set Detail view layout for reference module. A check box will appear on selecting a module that has reference module associated to it. Check the box to set Detail view layout for reference modules.

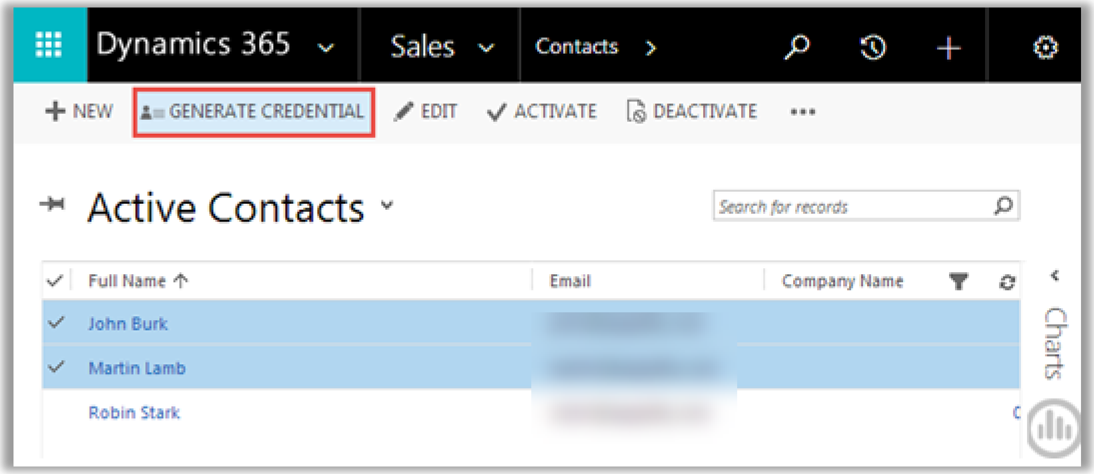
Generating Portal Credentials

- To generate portal credentials for a particular contact, enter into the detail view of that contact and click on **'Generate Credential & Send Email'.** Credentials will be generated for that particular contact and an email will be sent along with the credentials.



- To mass generate portal credentials for CRM contacts, navigate to Contacts module and select the contact records for which you want to generate credentials.

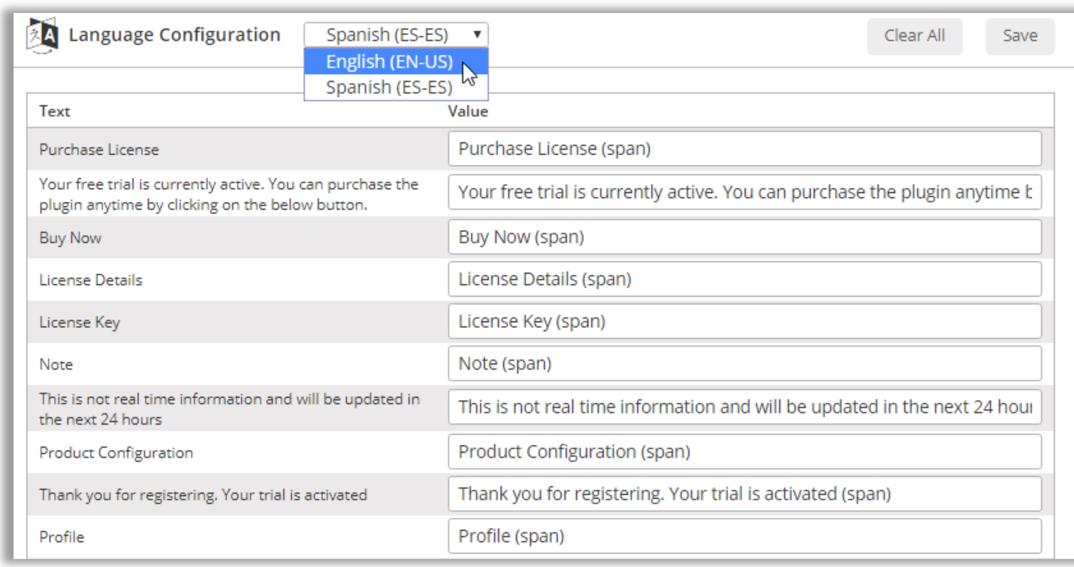
- Now, click on **'GENERATE CREDENTIAL'** button. This will generate username for all the selected contacts and an email will be sent to their email address with set password link. Once the user sets the password then can have access to interface.



Multi Language Support for Portal Users

- Customer portal provides multi-language support to collaboratively work online across organizational, geographical level and helps to overcome language barriers.

- Navigate to '**CRMJetty -> Configure Language'** page and click on configure language option.



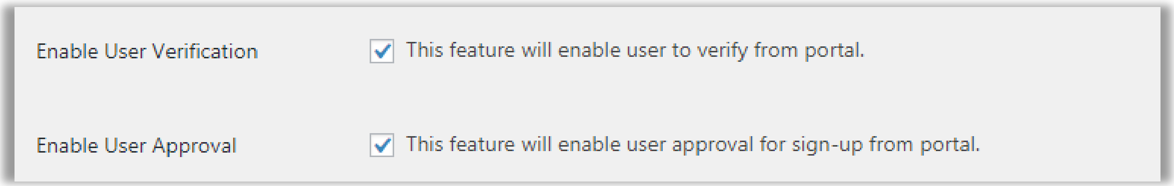
- Select language and add messages. It will be reflected on the portal when that language is changed by the portal user.

Note: Default language can be set from CRM view **"CRMJetty -> General Settings".**

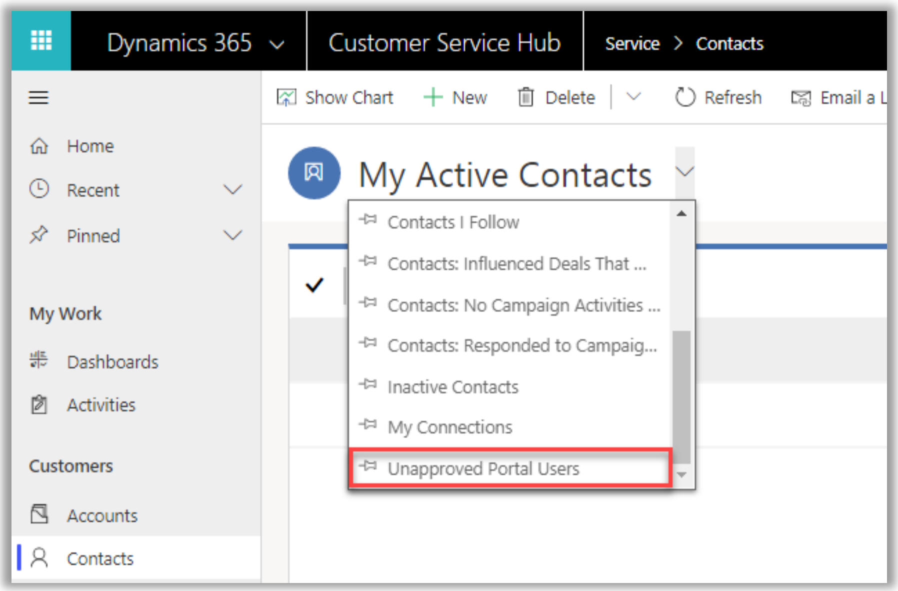
- You can add GDPR consent text from respective language page and the same will get reflected on portal side.

Approval and Verification for Portal Users

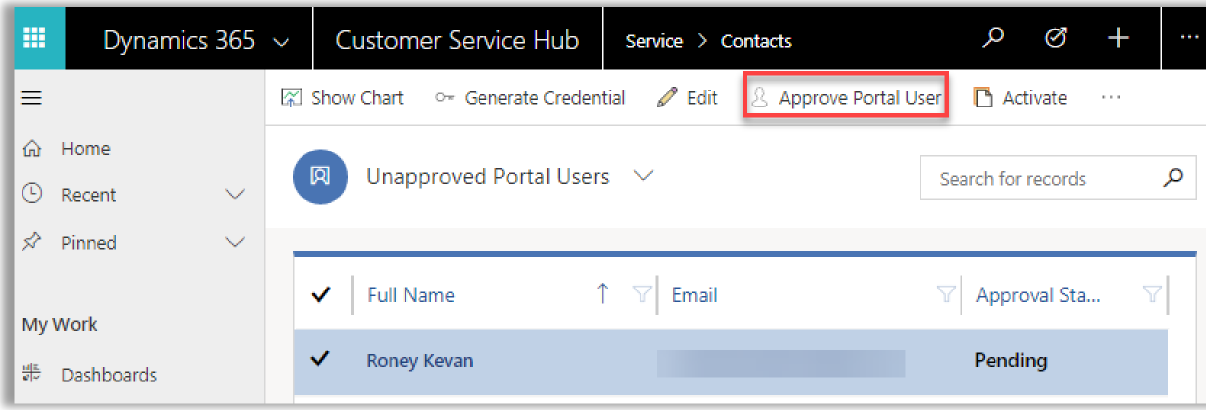
- If you want to provide access of portal to specific people approved by admin, then navigate to WordPress Admin Panel -> Customer Portal Settings Page.



- Tick the checkbox to enable user approval flow.
- Now whenever a portal user registers from portal, they will be added to Contacts module in CRM with pending status.



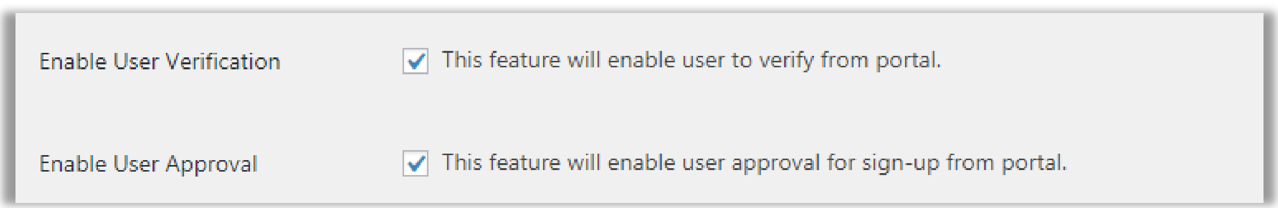
- Now you can filter contacts and get the list of pending contacts for approval by clicking on 'Unapproved Portal Users'.
- To approve contacts, select such contacts from the filtered contacts list view and click on the 'Approve Portal User' button.



- After approving, it will also send an email to portal users notifying that their access is approved and can access the portal.

- Instead of mass contacts approval, you can also navigate to the detail view of any contacts and approve them by changing the approval status from portal user information tab.

Note: Once the contact is approved, you cannot change the approval status of that contact.



- If verification flow is enabled, portal users need to verify their account then only they can proceed further for login.

Field Configuration

- For assigning any record to a particular portal user from CRM or to view the user in CRM to whom a record is assigned from portal, you need to configure some fields in CRM.

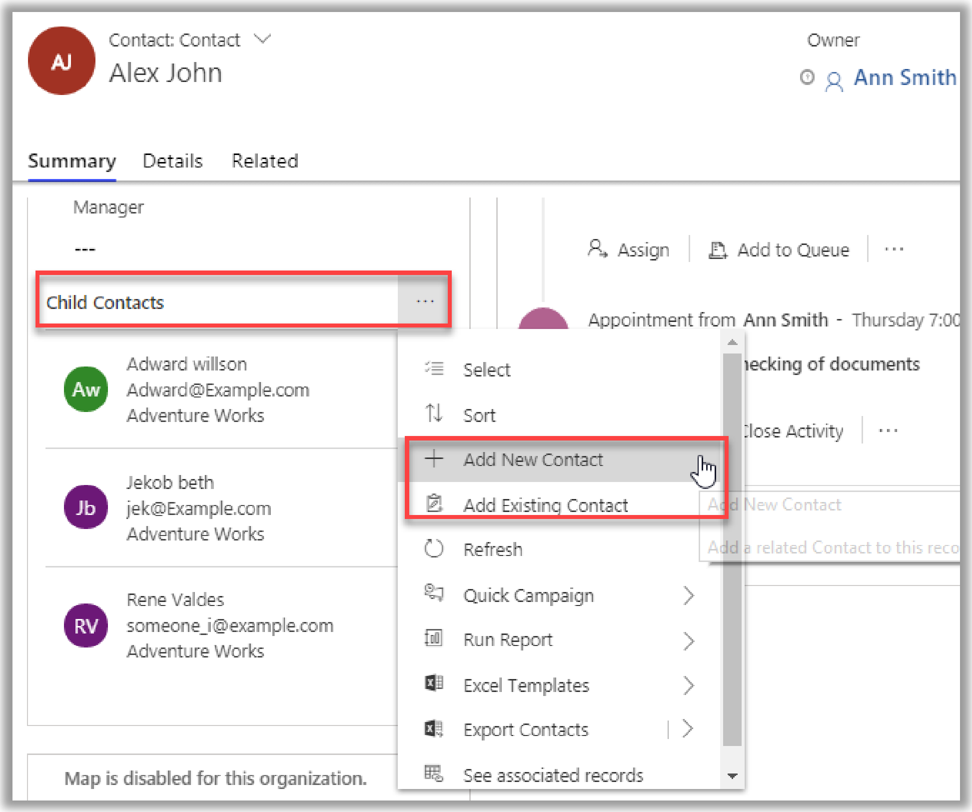
- Each module should have the below fields in its form. If no such field exists, then you need to add a field from Form Editor of that module.

- The table below displays module-wise field name which needs to be configured.

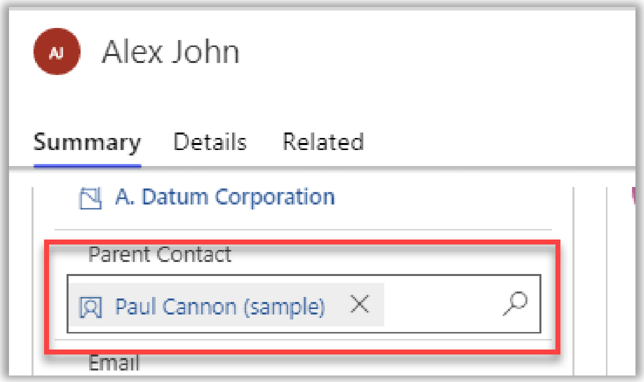
SR NO.	Module	Field's Display Name	Field's Name
1	Case	Customer	customerid
2	Order	Customer	customerid
3	Quote	Potential Customer	customerid
4	Invoice	Customer	customerid
5	Entitlement	Customer	customerid
6	Account	Primary Contact	primarycontactid
7	PhoneCall	Regarding	regardingobjectid
8	Appointment	Regarding	regardingobjectid

Settings Parent-Child Contact Hierarchy

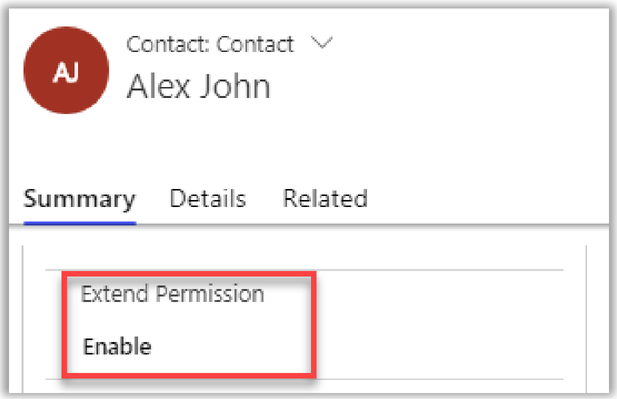
- For assigning child records to any parent record, navigate to detail view of contact entity.



- From child contact grid, you can add existing contact to list of add a new one.



- You can also set parent of any particular contact from details view by adding contact to **'parent contact'** field from lookup.



- Once the contact is added in hierarchy you can also set 'Extended Permission' for that contact which gives the contact rights to create hierarchical contacts from portal interface.

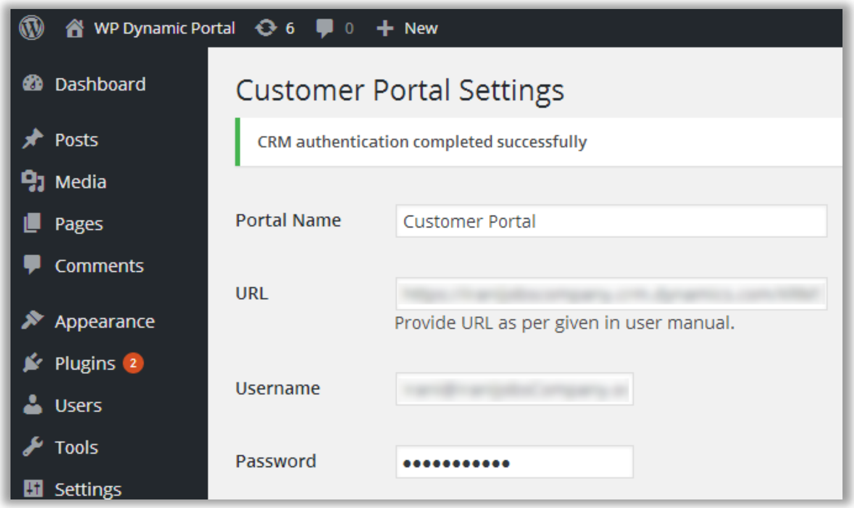
- This permission allows portal user to the create contact and generate credentials, enable/disable portal access for direct next level of child (i.e. one level of child) contacts.

- They can also view the details of entity records of the whole hierarchy.

Note: Contact should compulsorily link to at least one account to set hierarchy settings.

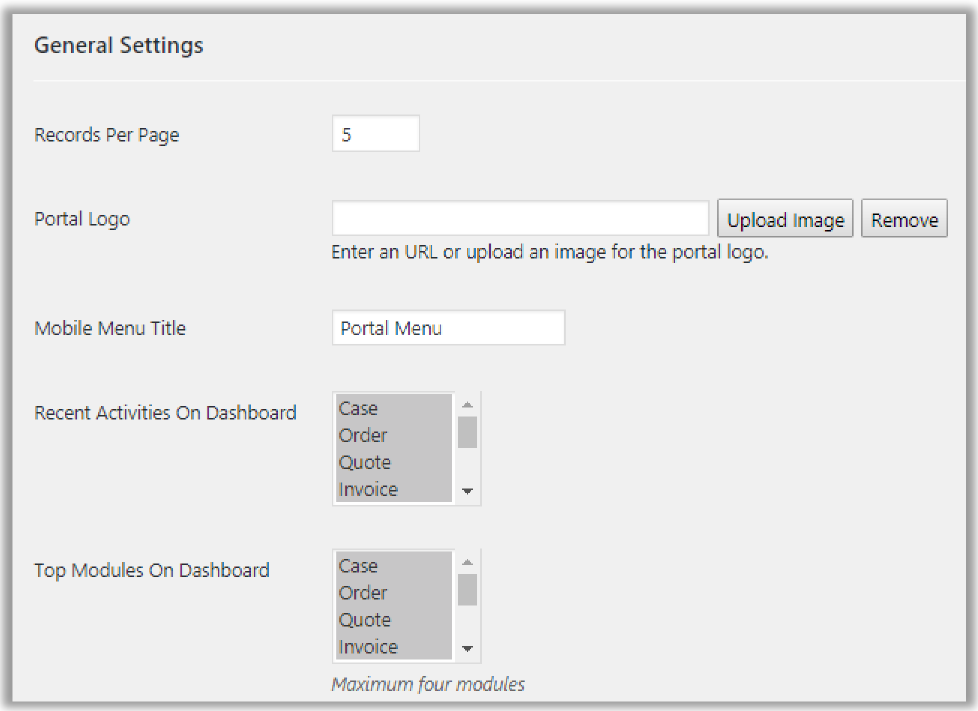
WordPress Configuration Settings

- To configure the Portal, go to WordPress admin side and click on **'Customer Portal'**.

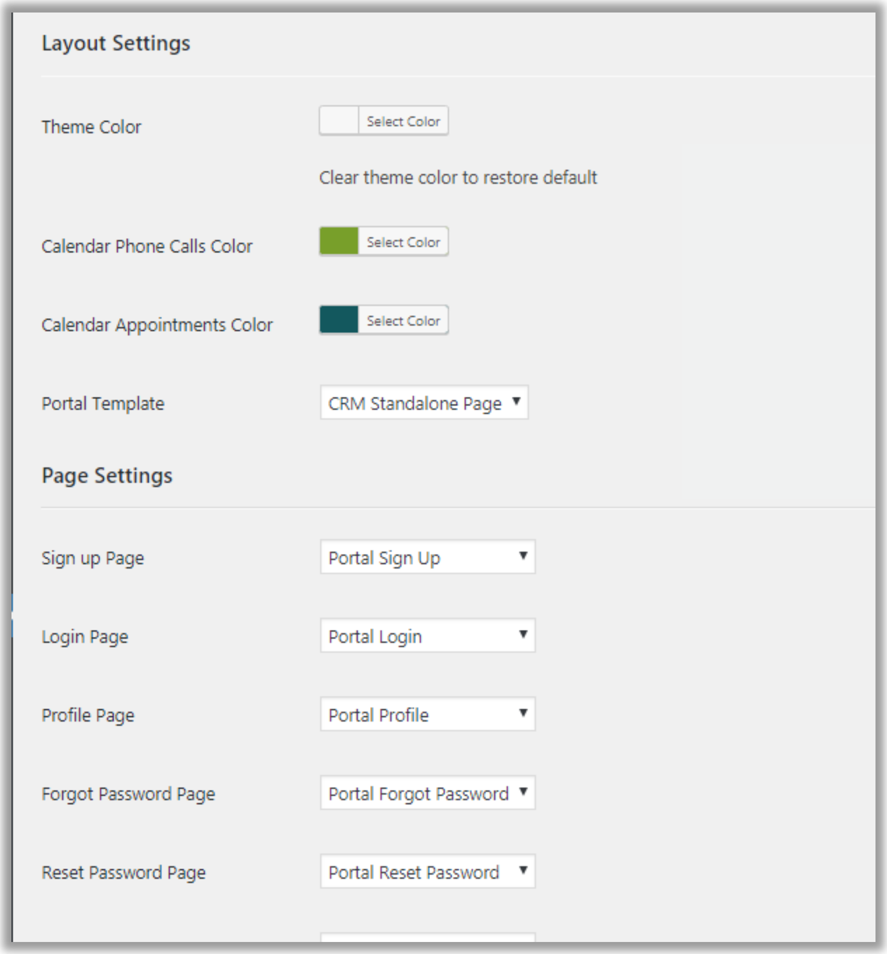


- Enter your Dynamics CRM instance URL.

- Enter your Dynamics CRM Admin credentials (Username and Password).



- From general settings, you can also specify the records per page you wish to display on a page or Upload a logo image for your portal. You can set recent activities for modules you wish to display on Dashboard.

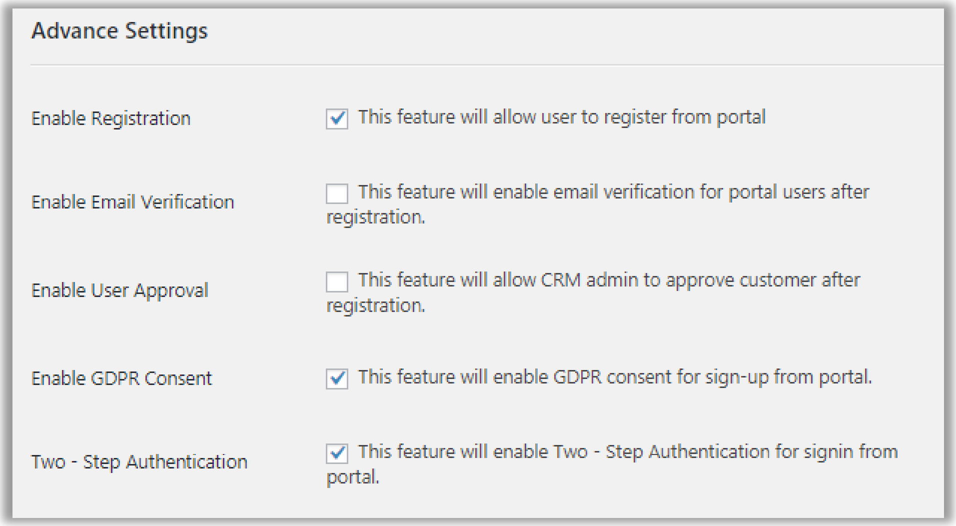


- You can also set various other configuration for layout and portal pages.

- If you want to make change or add existing portal pages to your pre-designed pages, you can use the below mentioned short codes: -

  - Portal Dashboard GUI: - **[bcp-dashboard-gui]**
  - Portal Forgot Password: - **[bcp-forgot-password]**
  - Portal Login: - **[bcp-login]**
  - Portal Manage Page: - **[bcp-manage-page]**
  - Portal Profile: - **[bcp-profile]**
  - Portal Reset Password: - **[bcp-reset-password]**
  - Portal Sign Up: - **[bcp-sign-up]**

Note: Choose 'Full Width Page' template for existing theme header and footer.



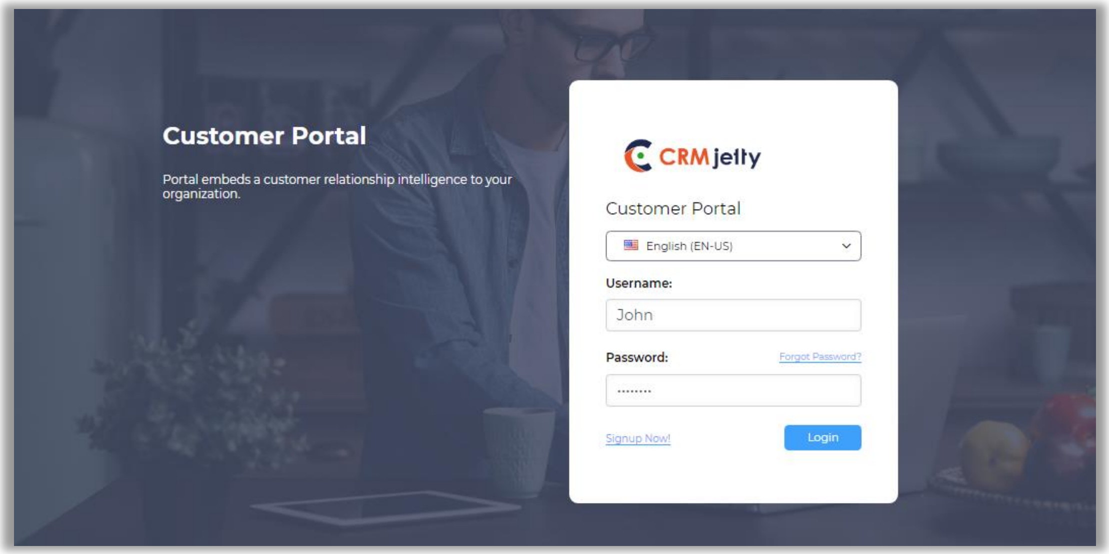
- You will get 'Advance Settings Option' from where you can get various option to enable registration, email verification, user approval, Two-Step Authentication and GDPR consent.

Front Side Instructions

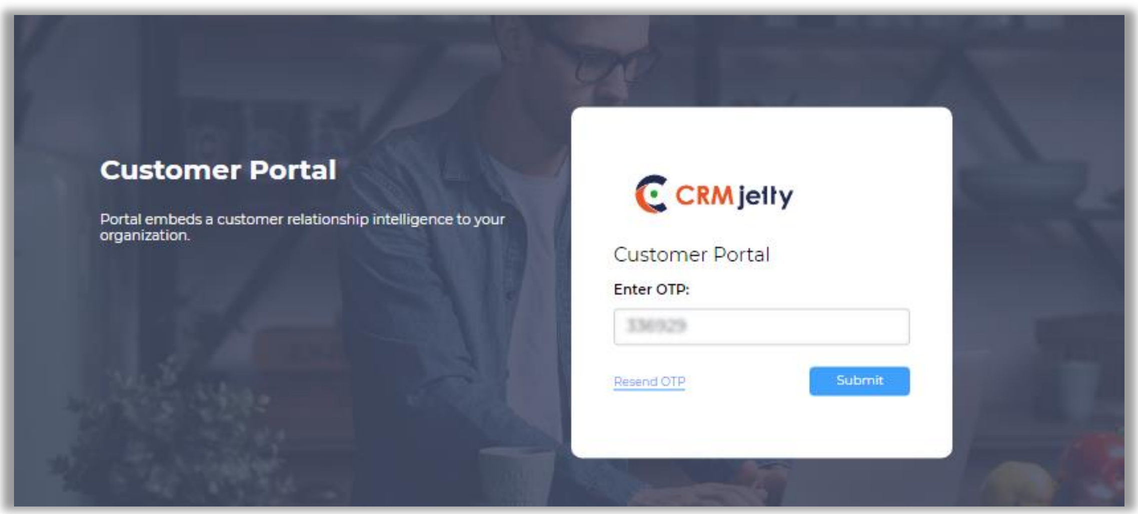
After completing all configurations at Dynamics CRM and WordPress portal for WordPress Portal plug-in, Customer can sign-up or login to WordPress Portal and access Dynamics CRM modules.

Login:

- Directly login to the portal using your portal credentials.



- If two-step authentication is enabled, then portal users will receive an OTP in email. Enter valid OTP and it will allow portal users to access interface.



Note: OTP is valid for 30 minutes. If not used, then portal user needs to resend OTP and get new OTP.

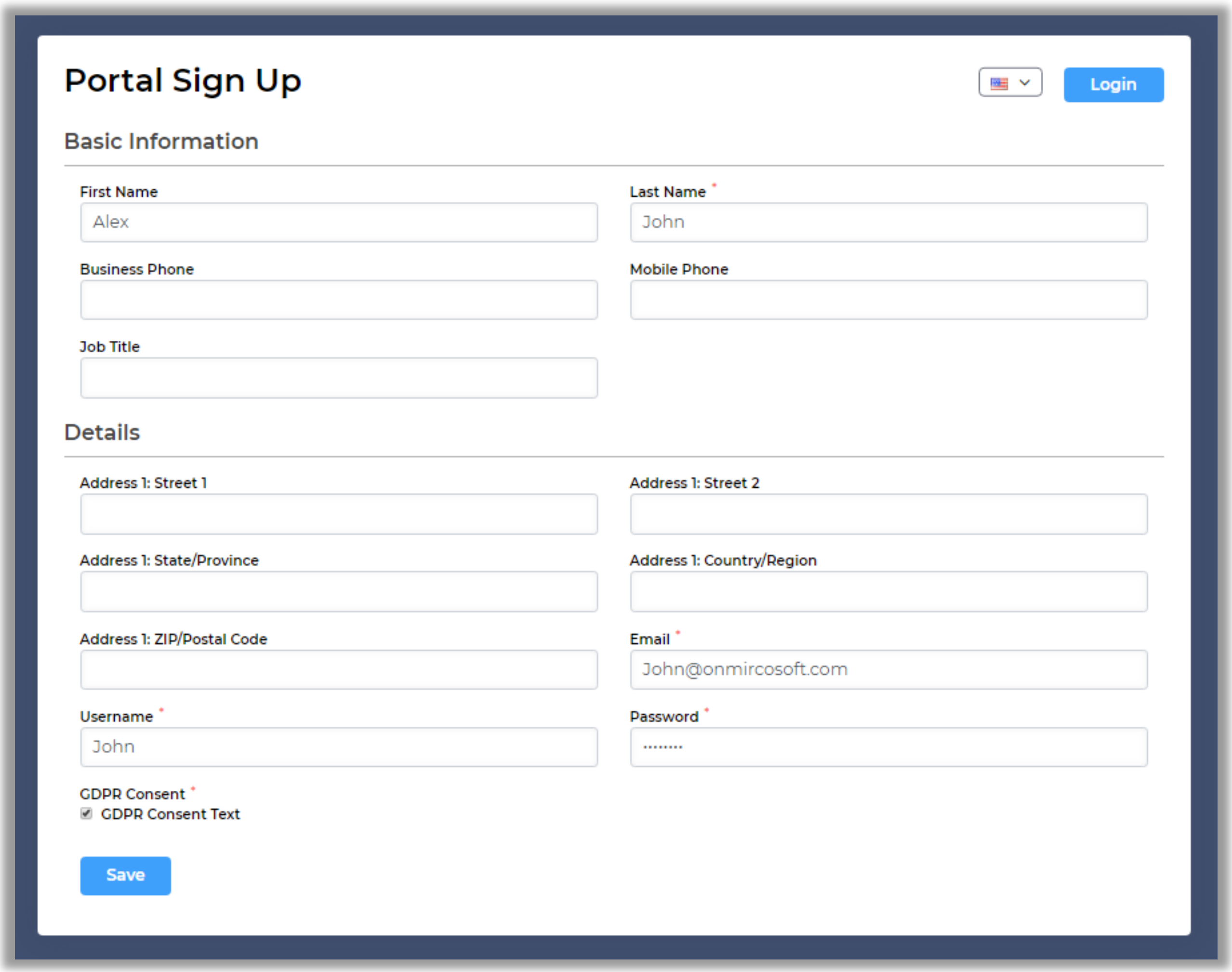
Sign Up:

- Customer can sign-up to the WordPress Portal by clicking on **'Sign Up Now!'** link on the login page. On click this link will redirect customer to sign up page.

- A new user 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 user does not exist in the system, then a user will be created in Dynamics CRM Contacts module.

- Once signed-up from the portal, User can directly login to the portal and can also access his WordPress account without having to login again.

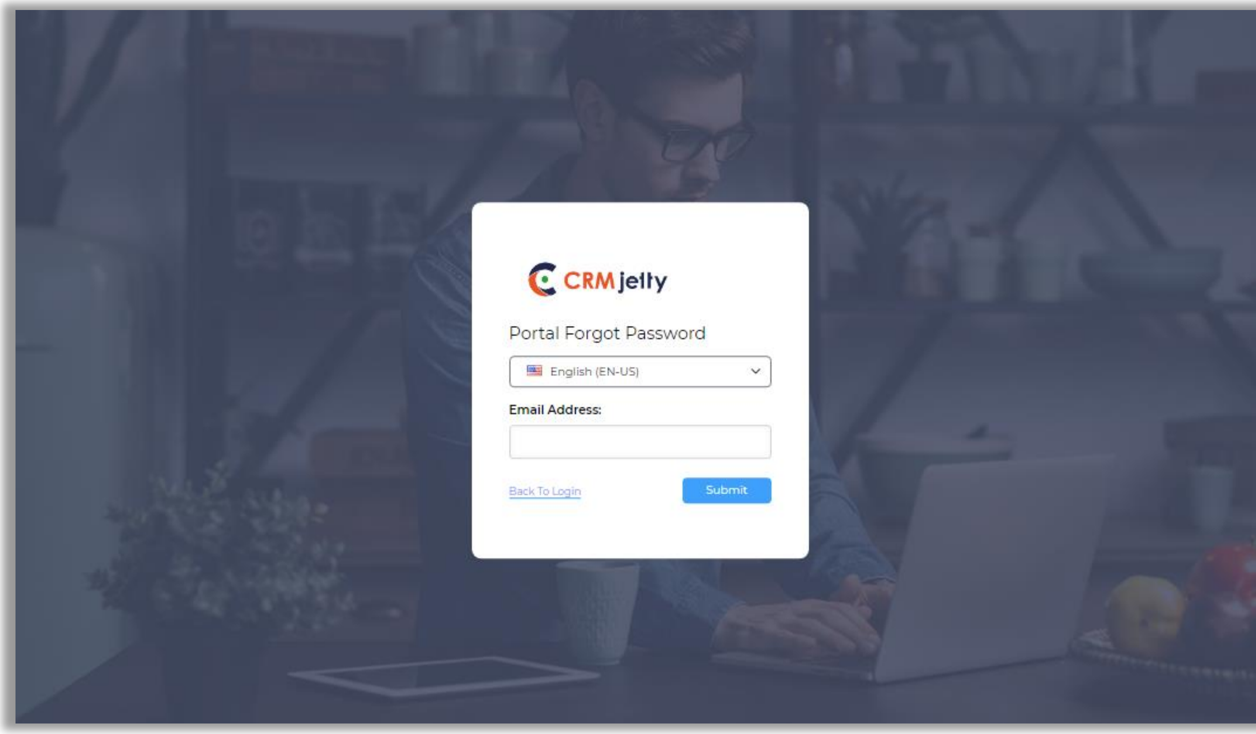
- **Note:** Already existing customers on both sides (WordPress and Dynamics CRM) won't get the access for Customer Portal automatically on installation.



- On Sign up, it will check if any customer is registered with same username and email address? If no such user exists in the system, then it will create a record in the Dynamics CRM's Contacts module. After successful registration user will be redirected to the login page. Now user can login to portal with their Username and Password.

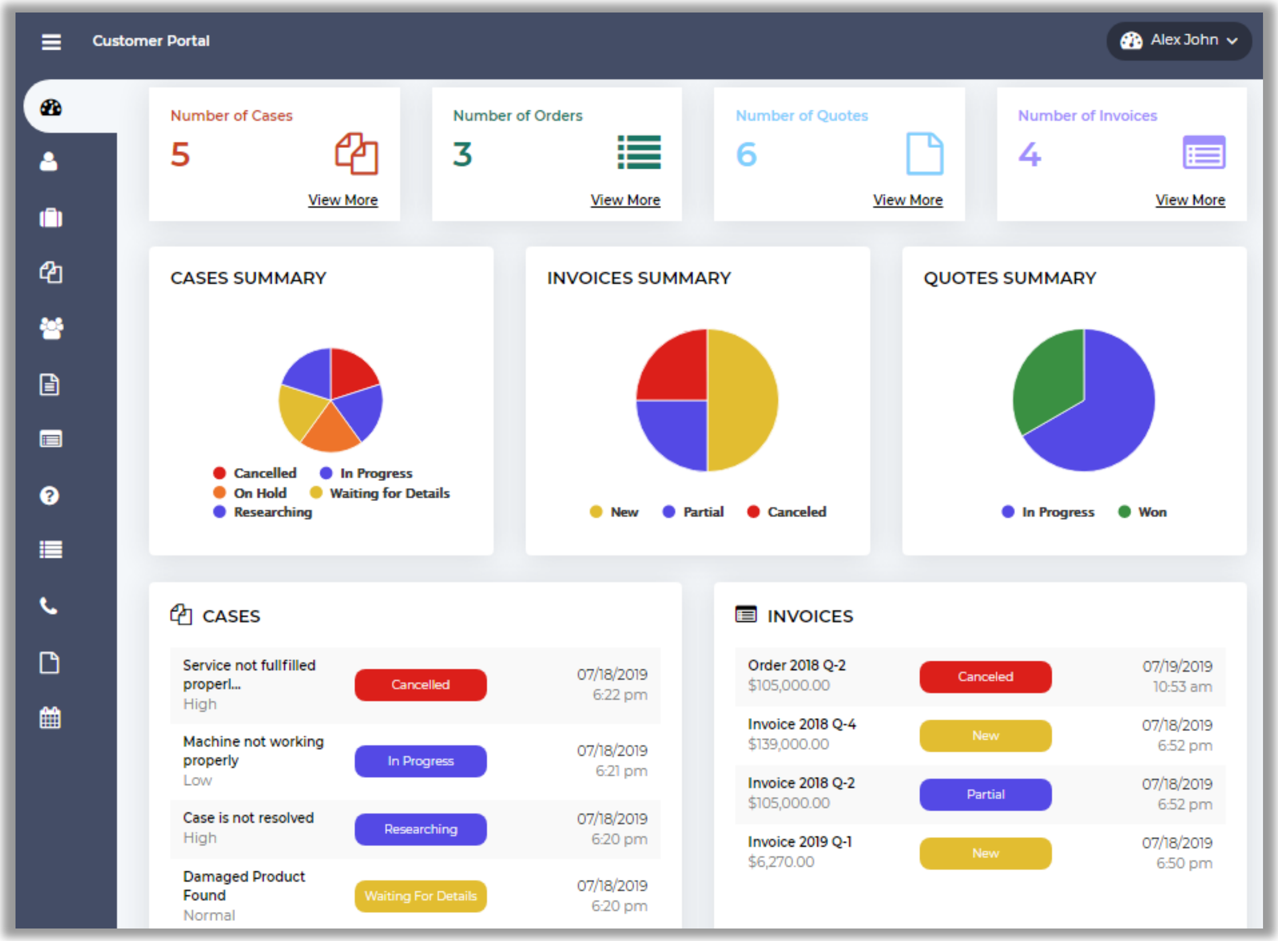
Forgot Password:

- Portal user 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 reset password link on your email.



Portal Dashboard:

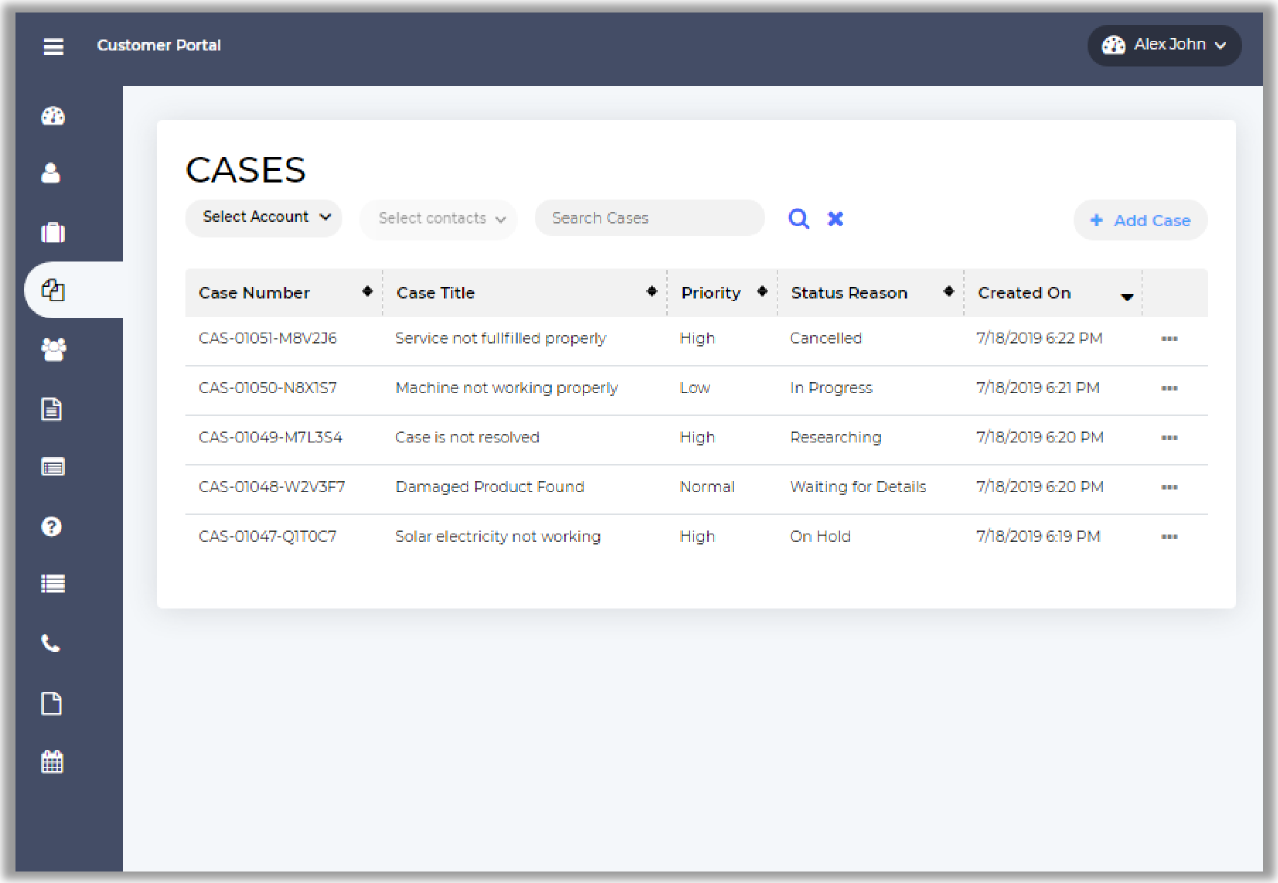
- Quickly access any module using the module icons. WordPress admin can set the accessibility to recently added records for portal users. Accordingly, those modules with their recent records will be displayed on the dashboard.



- Dashboard also includes recent activities on dashboard as well as top modules.

List View:

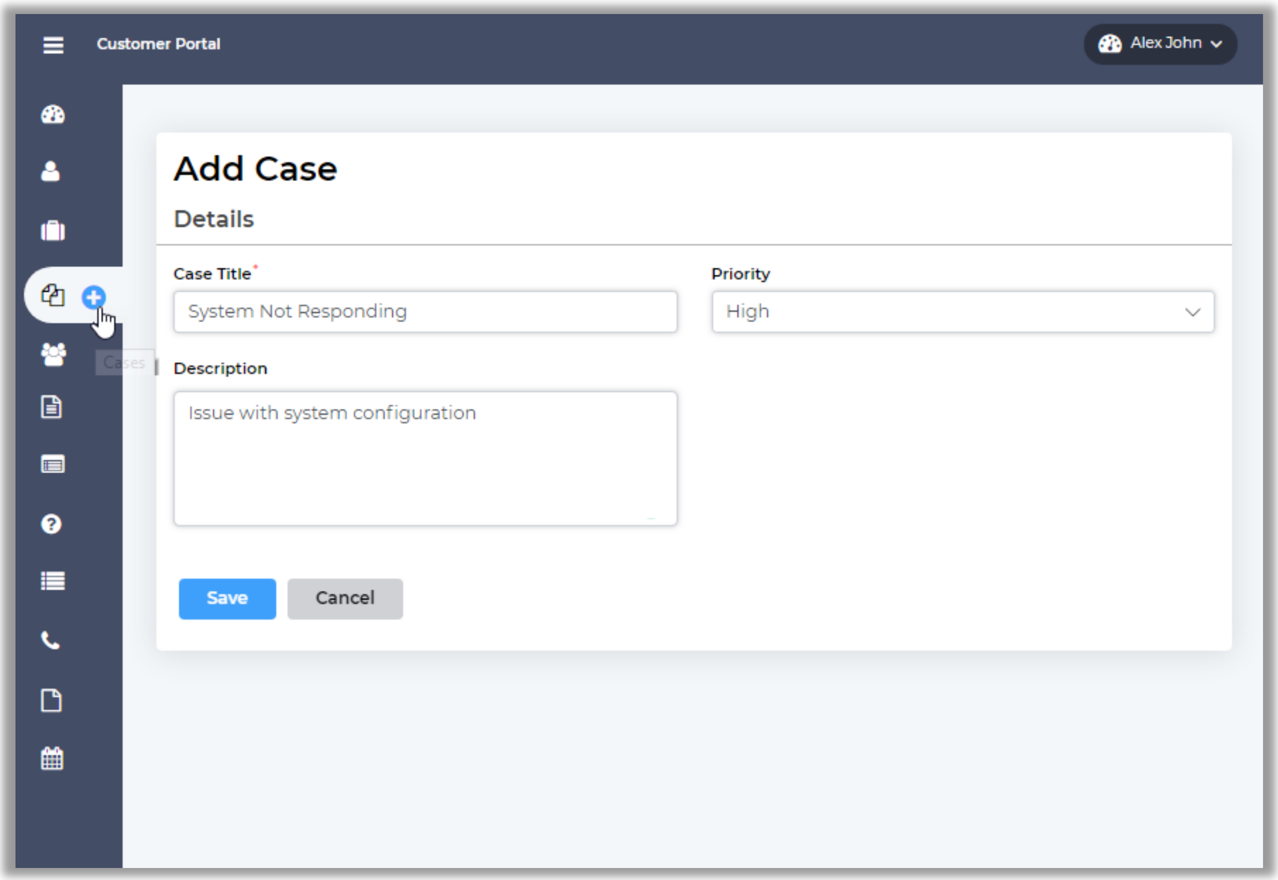
- Navigate to any module and you will be able to see the list of records of that module. You can search a record from the list view, delete it or update it.
- You can also add a new record to that module. To add a new record, click on the **'Add'** button.



- You can also filter the existing contacts based on account and contact selection. It will allow to filter and get details of specific contacts.

Add Record:

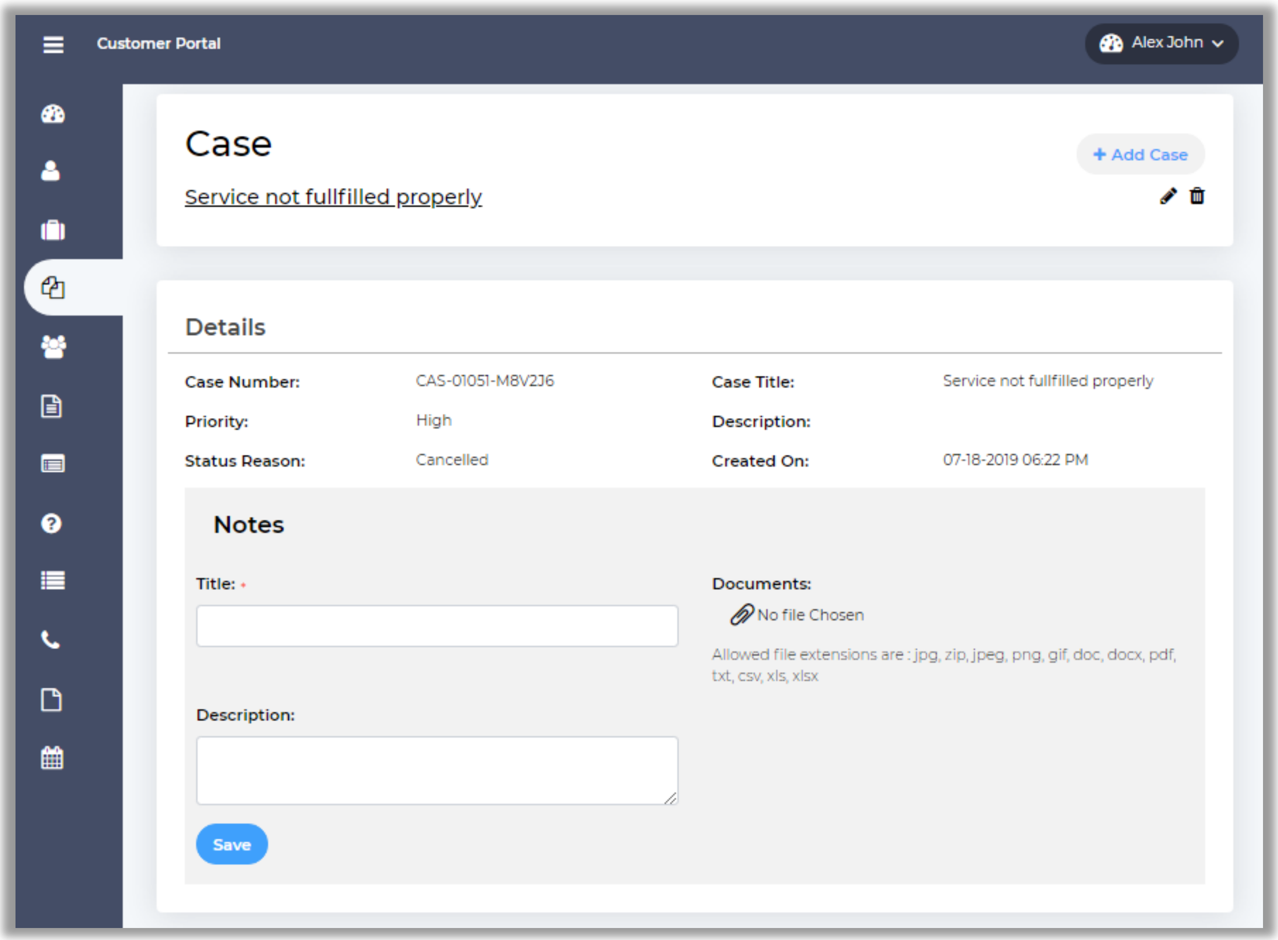
- Add a new record in a module from the portal and it will get reflected in the Dynamics CRM.



- Portal Users can also use '**Quick Add**' button to add record in any module.

Detail Page:

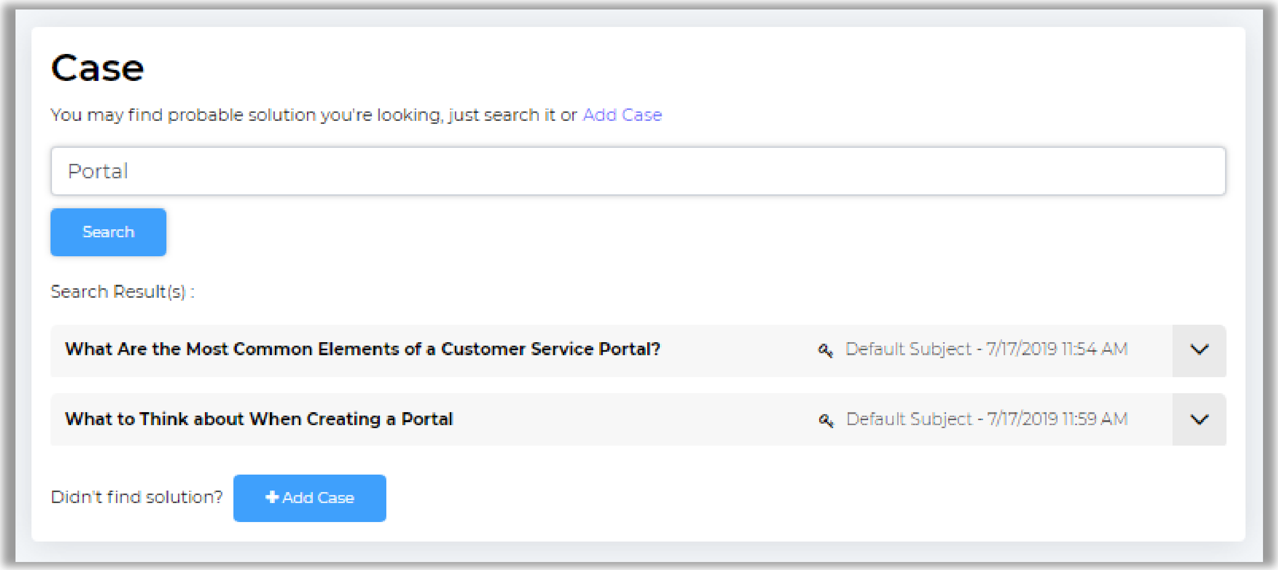
- Click on the **'View'** button from the List View and view the details of a record. You can edit that record from the detail view.



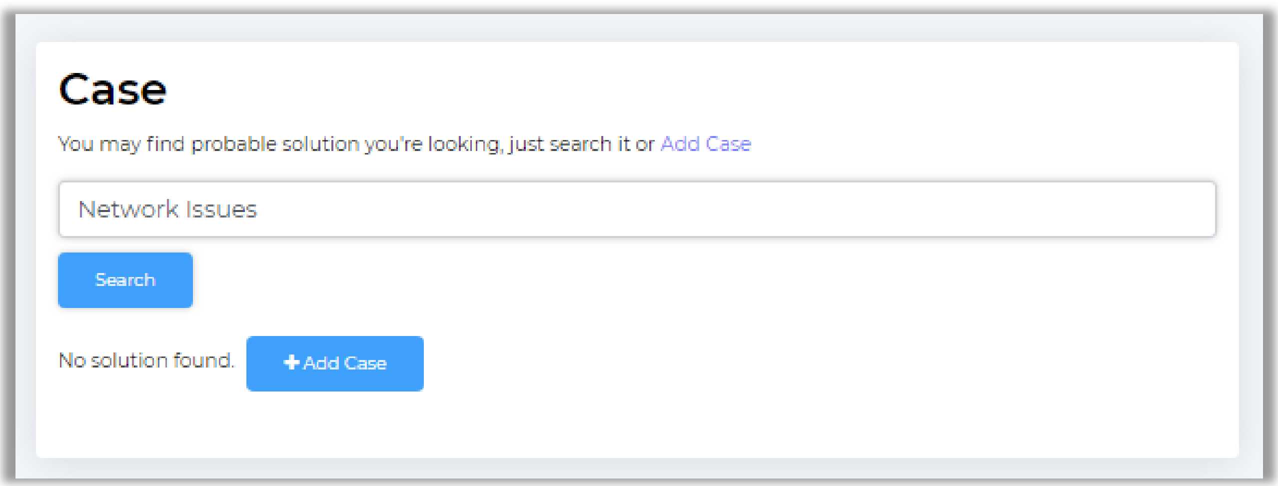
Case Deflection:

- This feature in portal will help portal user to get probable solution before generating any case.

- When portal user faces any queries or issues, they will be able navigate to add case option.



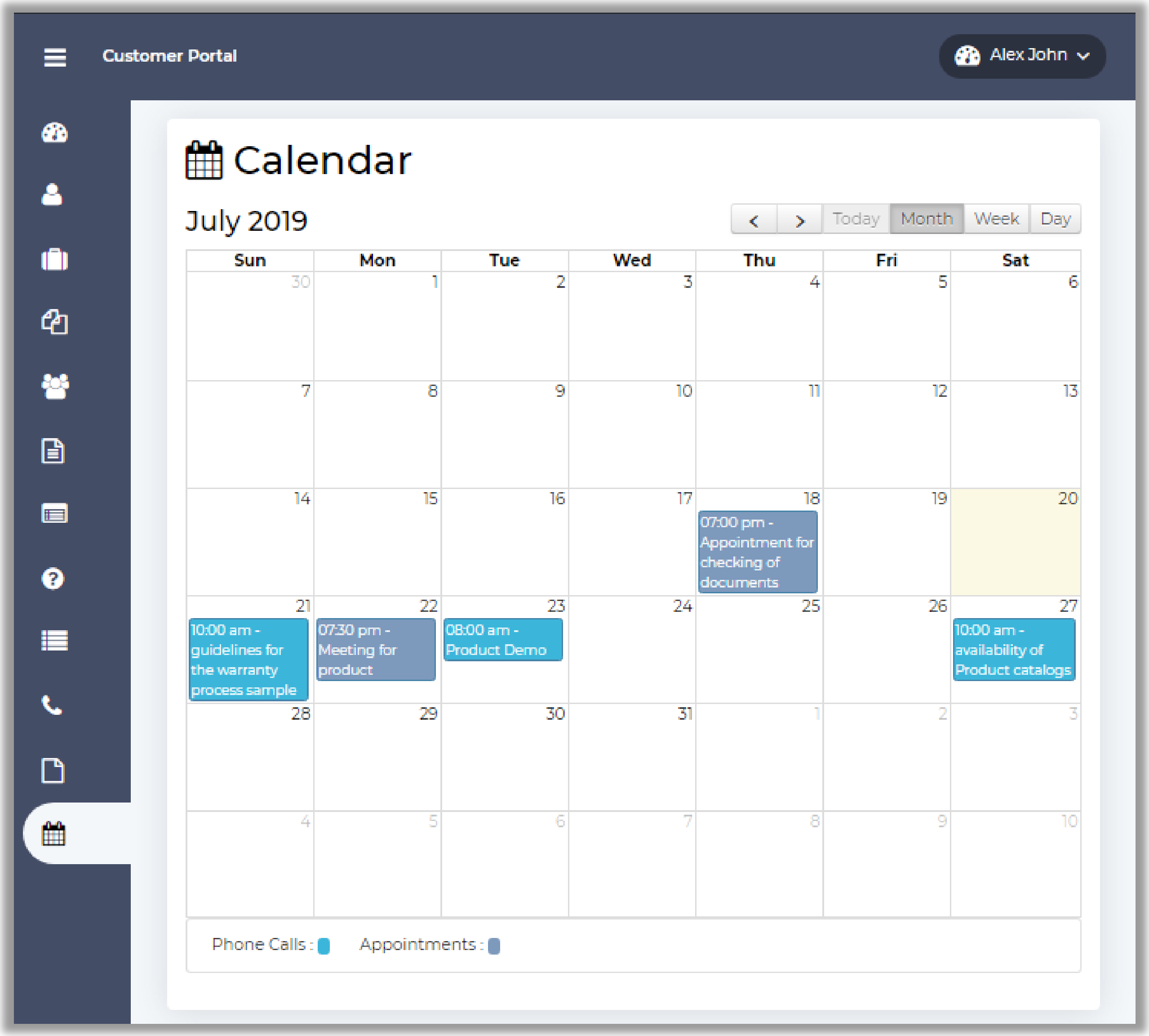
- Portal users can add queries or issues in search solution box. If there is any appropriate solution related to that case, then solution will get listed.



- If no solution is found related to portal user's queries or issues or they didn't find what they were looking for, then they can add case by clicking on "Add Case" button.

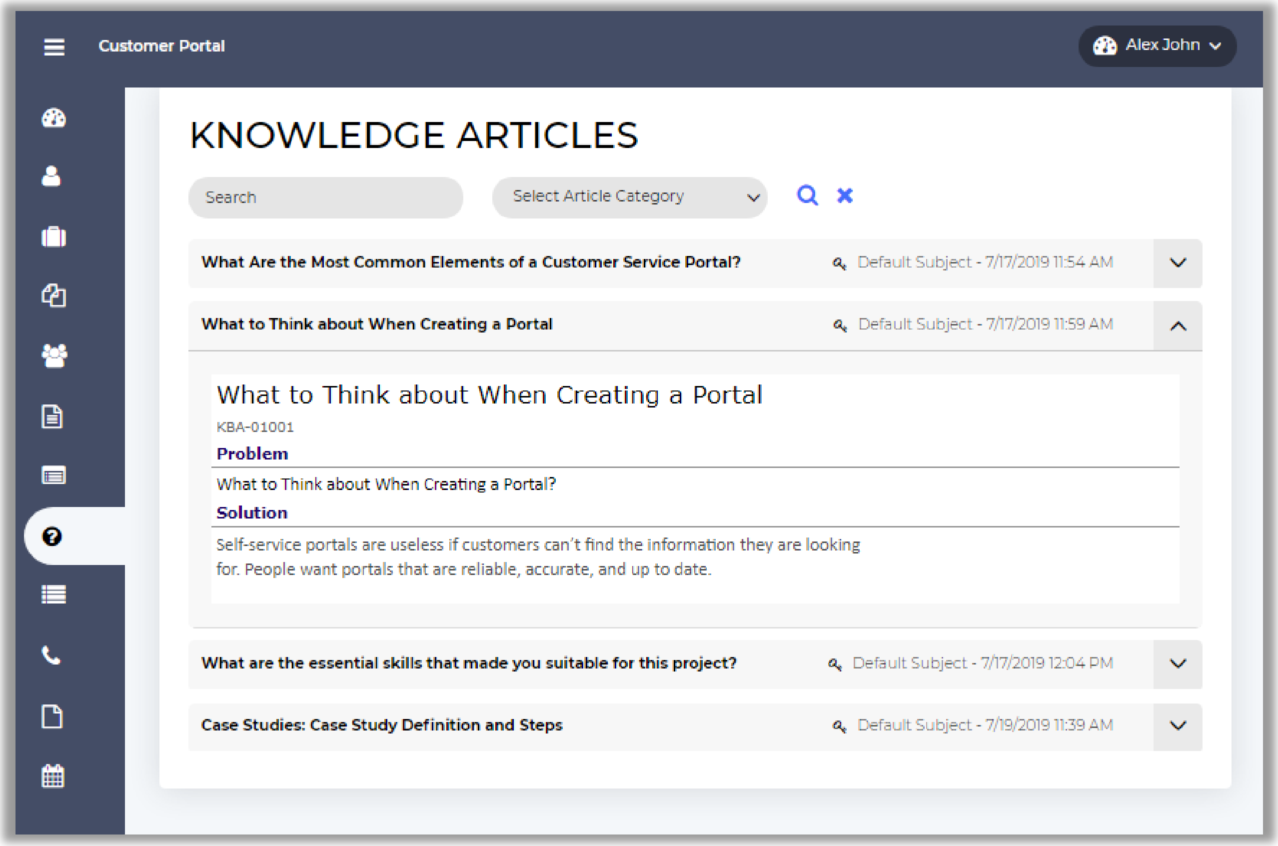
Calendar Page:

- You can view Phone Calls and Appointments on calendar for particular date with time.



Knowledge Base:

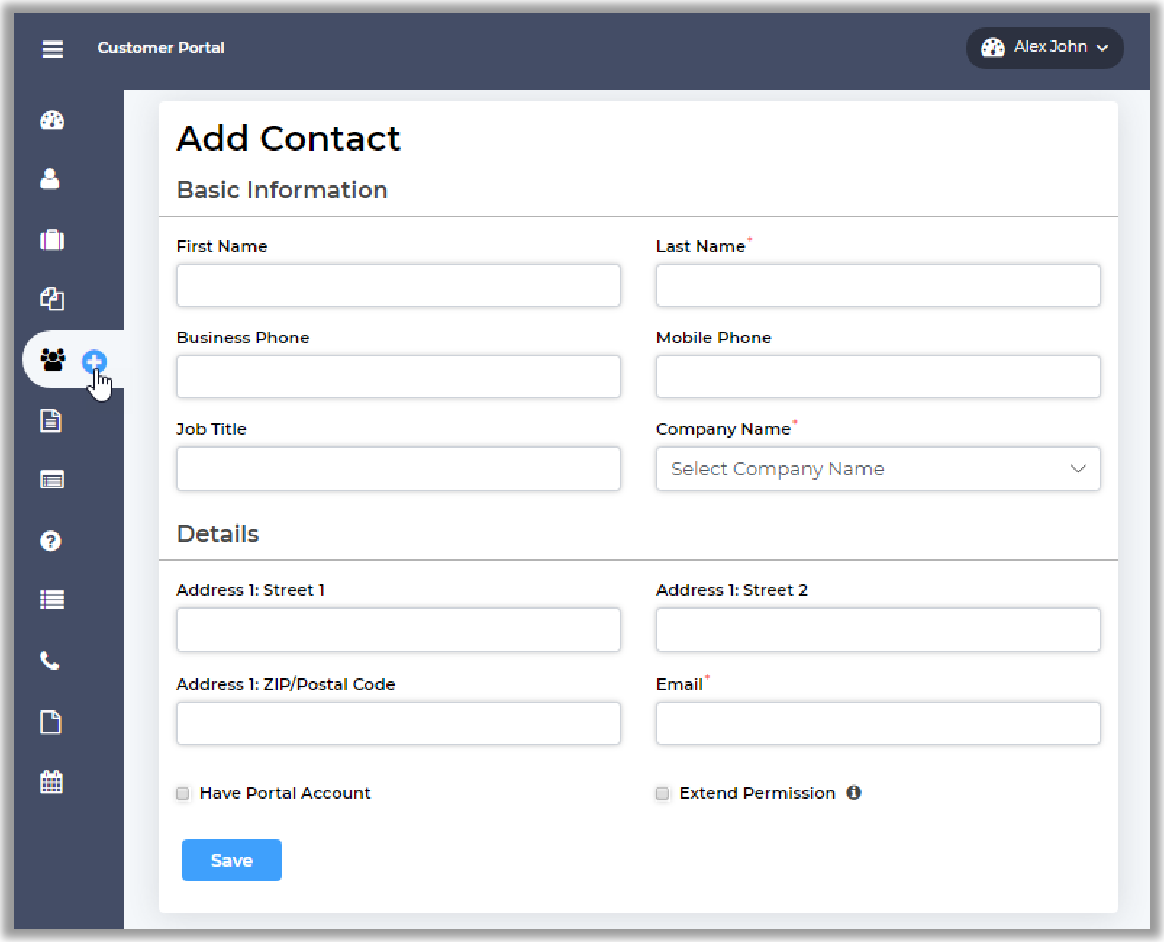
- Access the Knowledge Base module of Dynamics CRM from portal to view question and answers based on category.



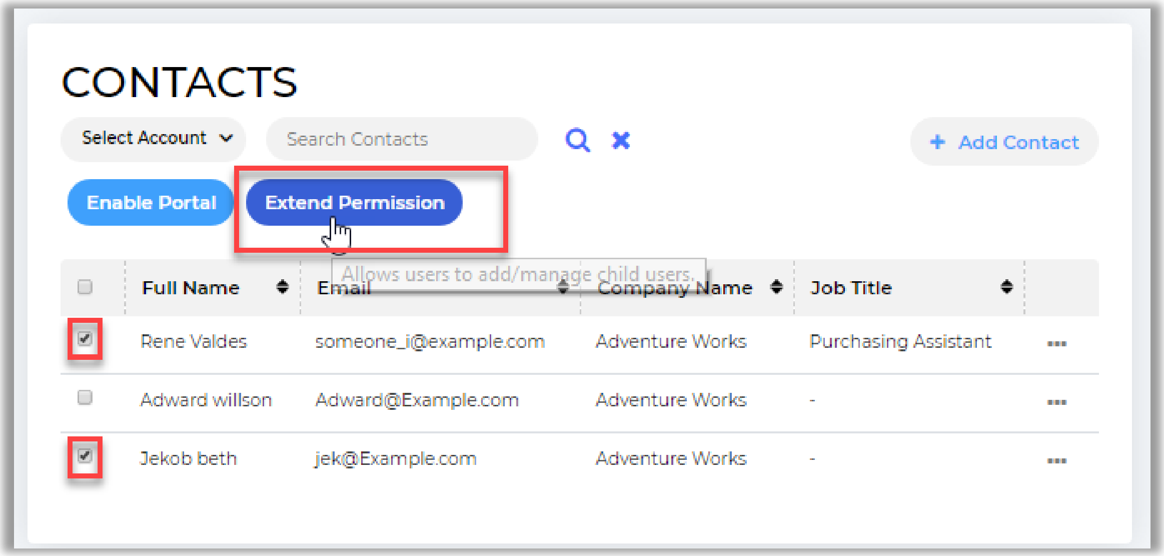
Contact Management:

- Portal Users can manage contacts as per the access rights provided to them i.e. They can add new contact, provide access to interface from portal itself by generating credentials.

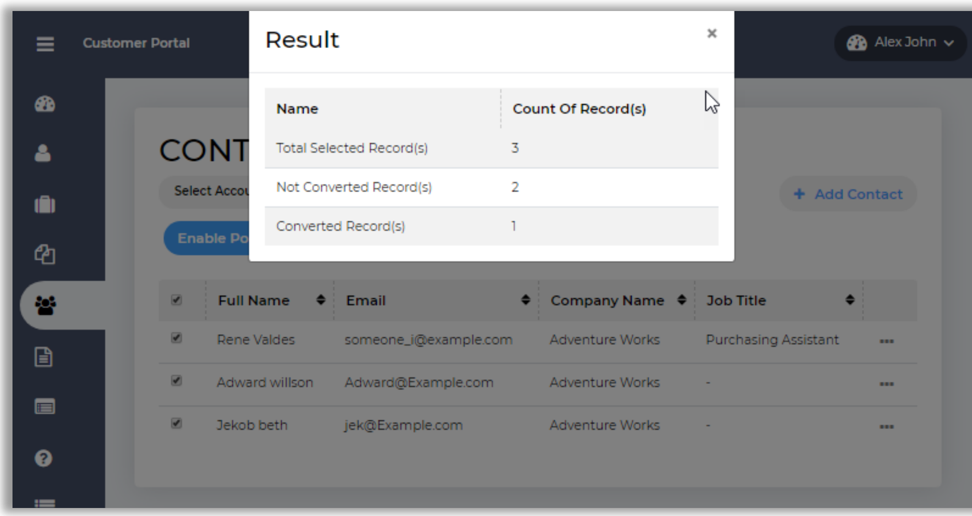
- For adding contact, navigate to contact tab and click on 'Add Contact' to add new contact.



- You can also mass select contacts and provide access to them for portal or provide extend permission so that further they can create contact from portal itself to manage hierarchy.



- Navigate to contact's list view and select the contacts to provide access of portal by generating credentials for them or give then extended permission.

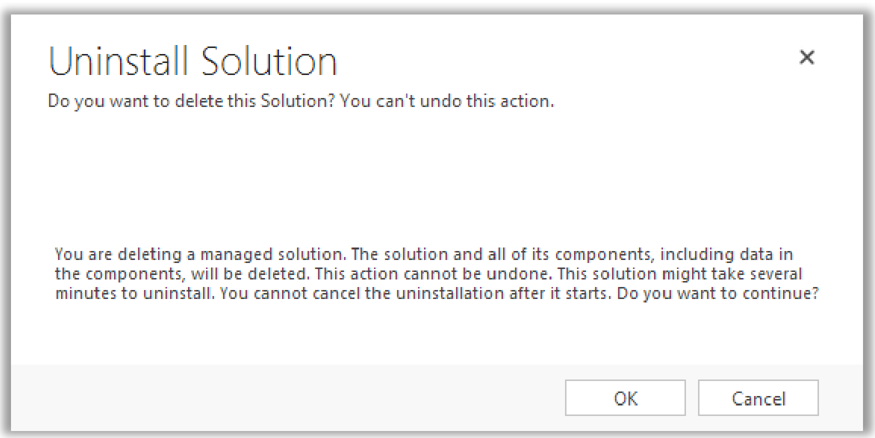


- It will provide the summary to converted and not converted contacts.

Un-installation Steps

- Navigate to **Settings -> Templates -> Email Templates** and "Delete Email Template.
- If you have created any template and used Username or Password field, then "Delete" that template also.
- Now to uninstall the Solution, navigate to **Settings - > Solutions**
- Check on the Plugin Name and click on **'Delete'**

- Click on OK to Delete and uninstall the solution from CRM.



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Customization:
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