USER MANUAL

Dynamics CRM Customer Portal for WordPress

Version: 4.1.0

WordPress Compatibility:

WordPress: From 4.0 to 5.5

Dynamics CRM Compatibility:

Dynamics365 on-premise (v9.0) and above
Dynamics 365 (v9.1) and above
(Available in Sales, Customer Service, Field Service, Project Service)

TABLE OF CONTENTS

Introduction

This 'Dynamics CRM Customer Portal' plugin will help your customers to use several Dynamics CRM modules in their WordPress 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.

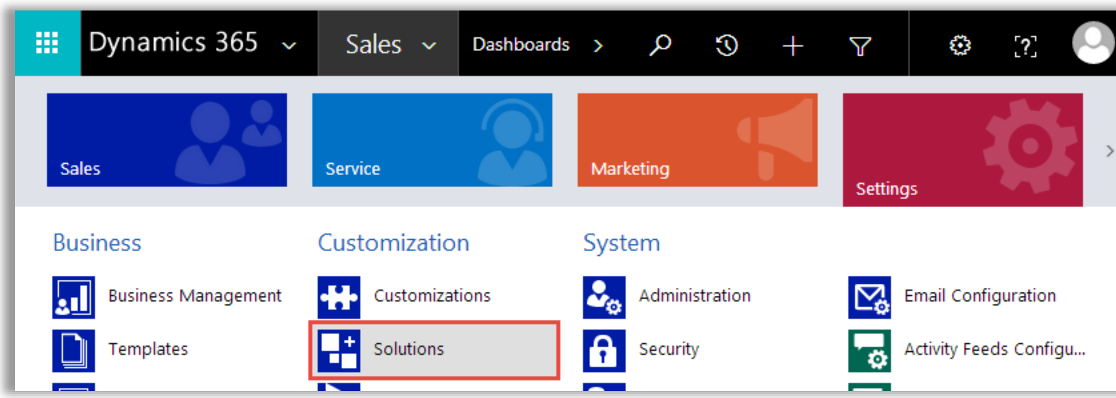
- You should login as an Administrator in Dynamics CRM.
- Check that your Dynamics CRM instance is compatible for Customer Portal.
- You will require a Product License Key to activate the Plugin. To obtain the License Key just drop us a mail at support@crmjetty.com along with your Domain Name.
- If you 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 then 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

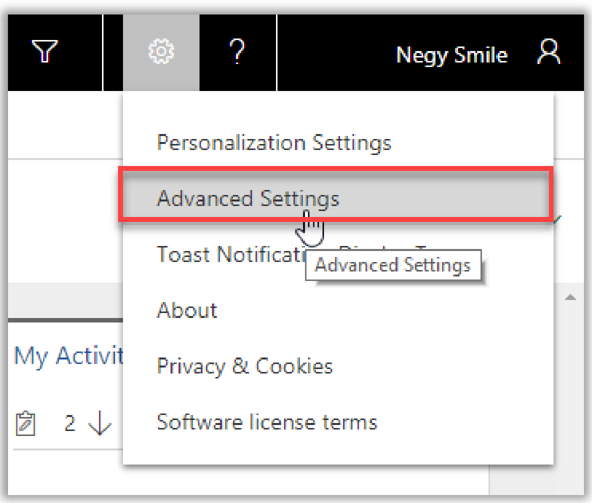
To install 'Dynamics CRM Customer Portal' plugin, the following steps has to be followed:

- On purchasing the plugin, you will get a zip file named DynamicsCRM-Customer-Portal-v3.0.zip
- Login into your CRM Account and click on **Settings → Solutions.**

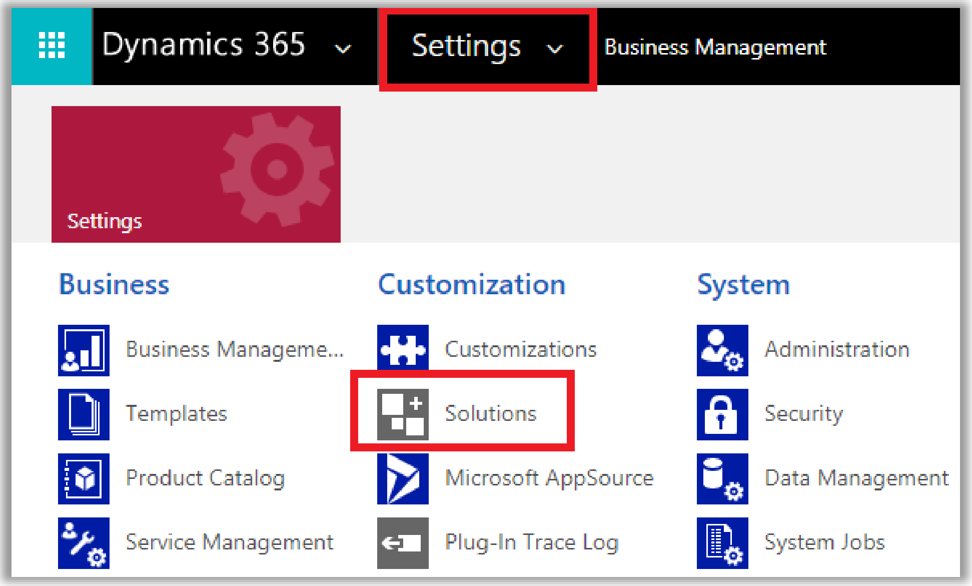


Or

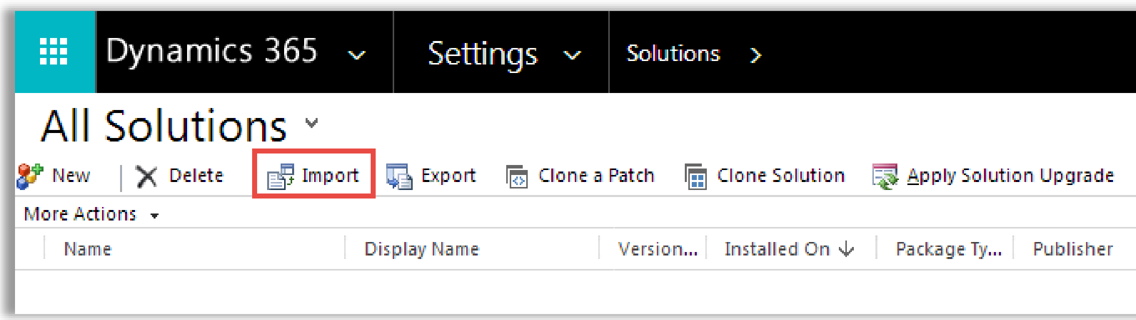
- If you are in unified interface, click on **Settings** icon given on the right side of the title bar. Then click on **Advance Settings**.



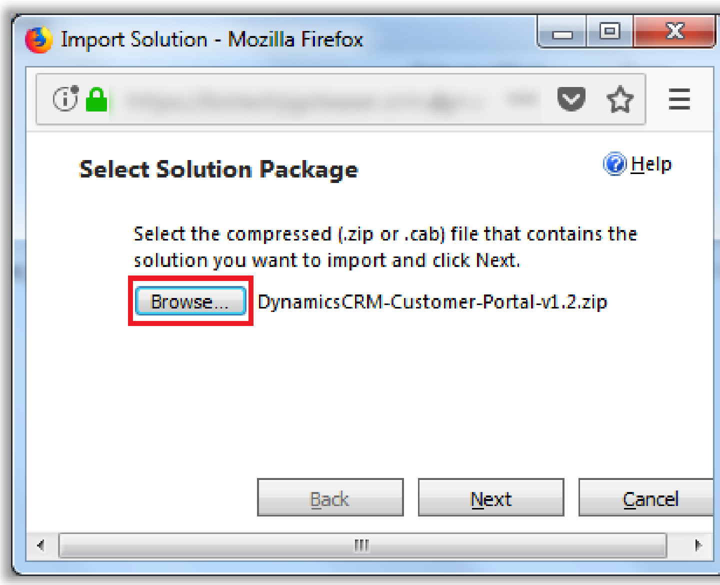
- Now, Navigate to **Settings → Solution**.

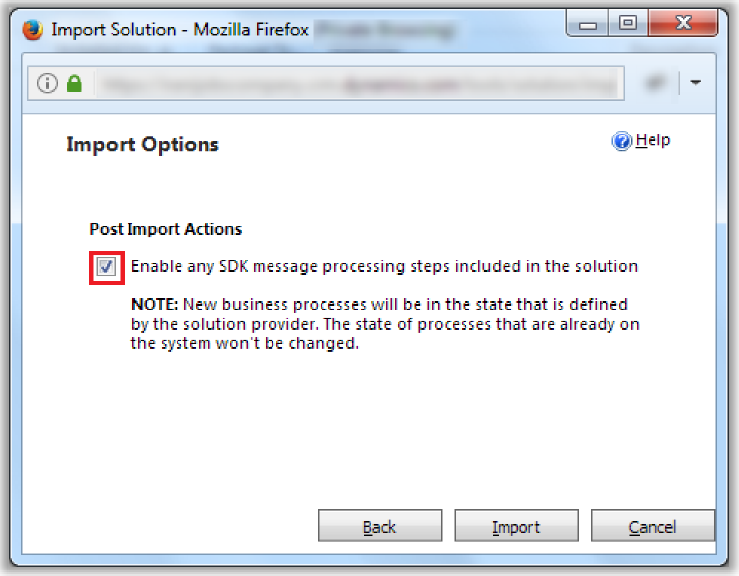


- Click on **'Import'** to upload and install the Solution.



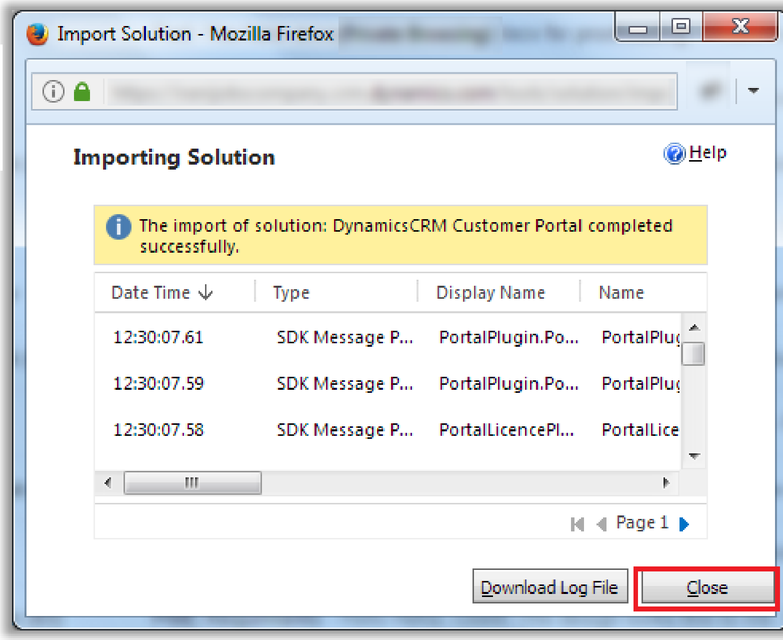
- Click on **Browse** button and choose the Package Zip File for Dynamics CRM Customer Portal from the Import Solution Window.
- Click on **Next** for further processing.

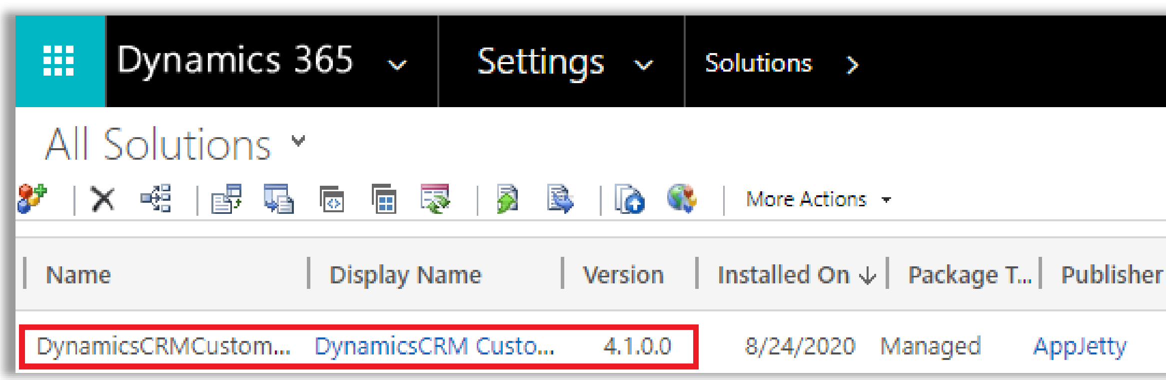




- Check the box to enable any SDK message processing steps included in the solution and click on Import button to import the Solution.

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

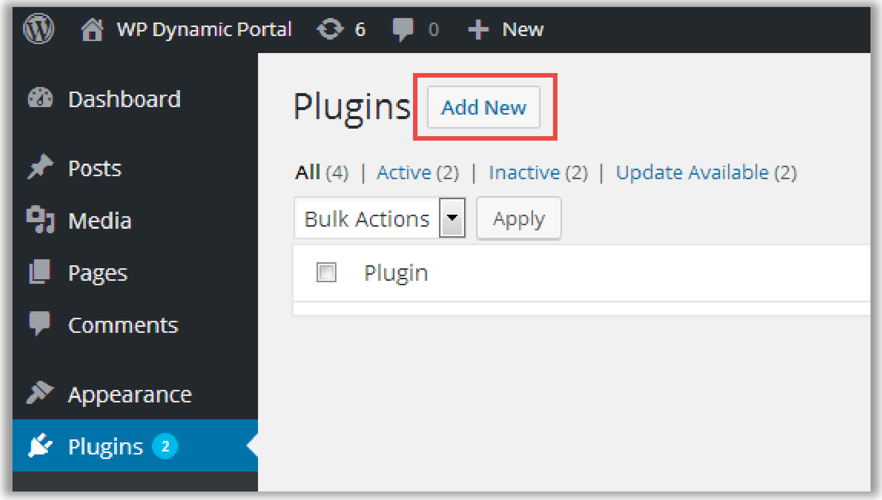




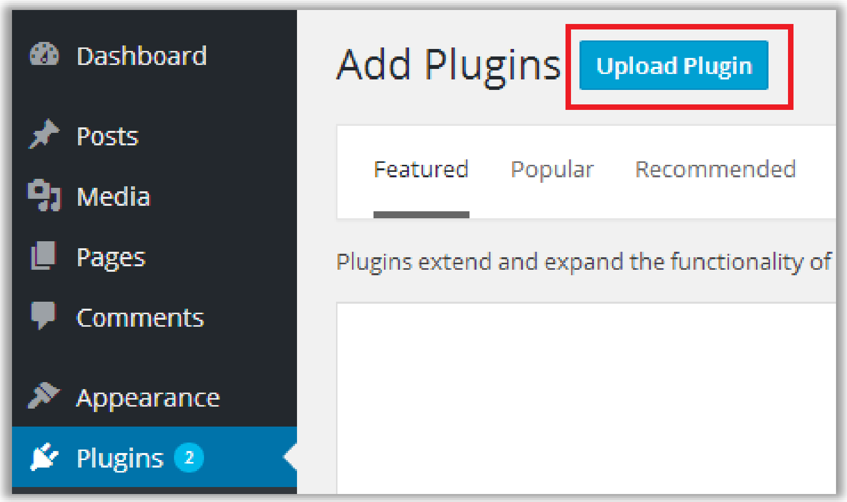
- Once you import the solution, it will be displayed in the solutions grid view.

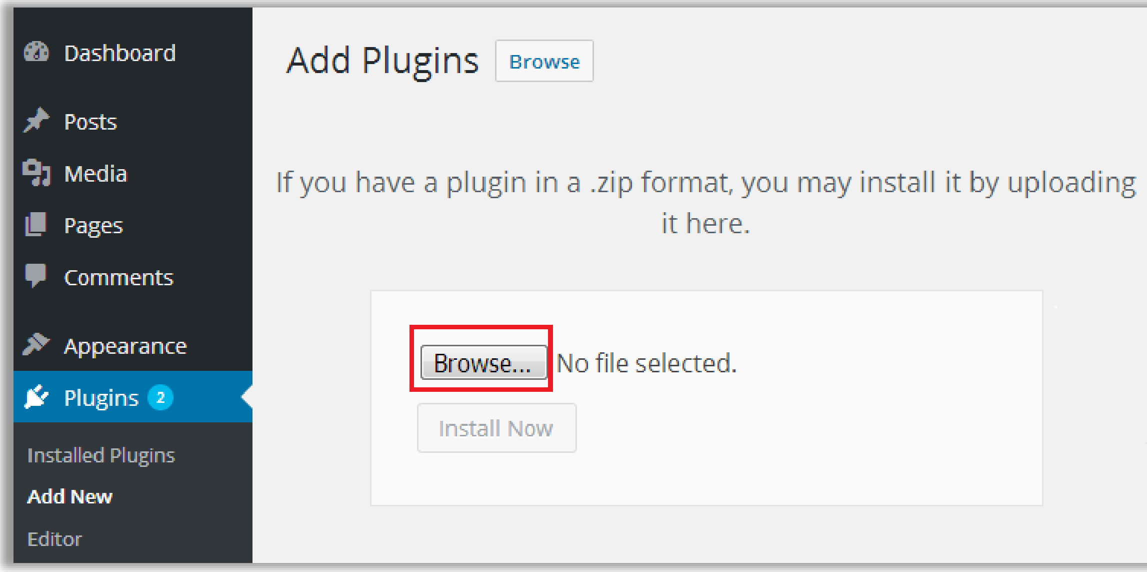
WordPress Manual Plug-in installation

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

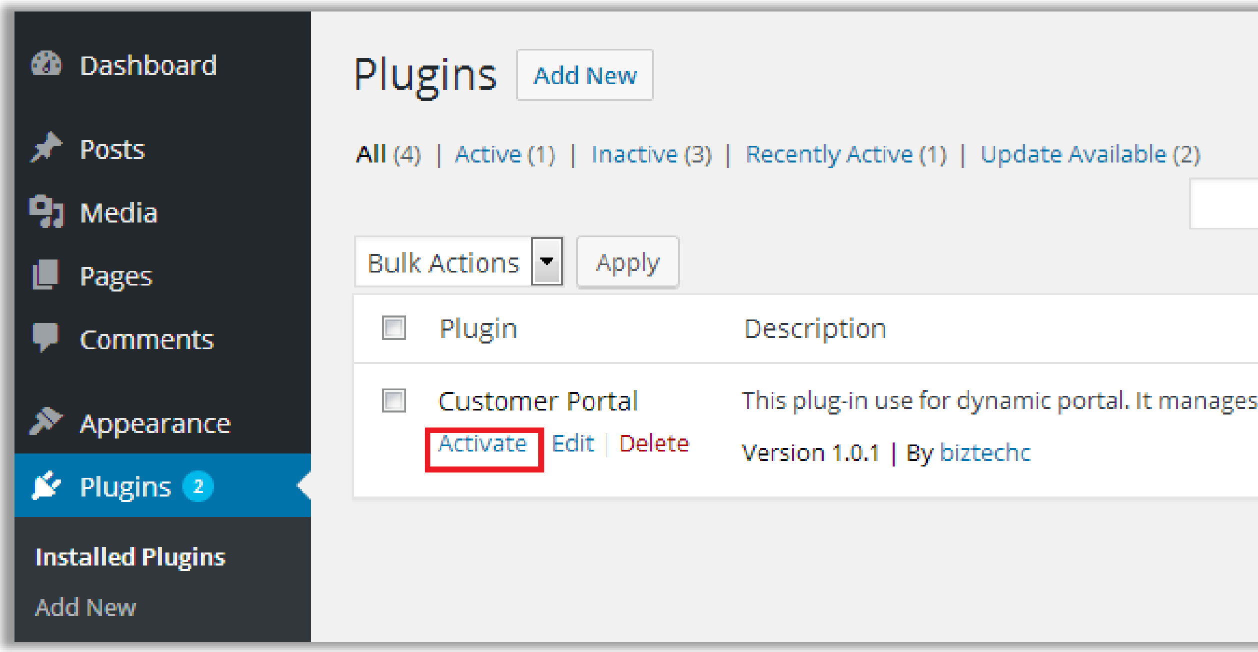


- To upload the plugin, click on **'Upload Plugin'** button.





- 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.

Dynamics CRM Plug-in Configuration

Get activation key

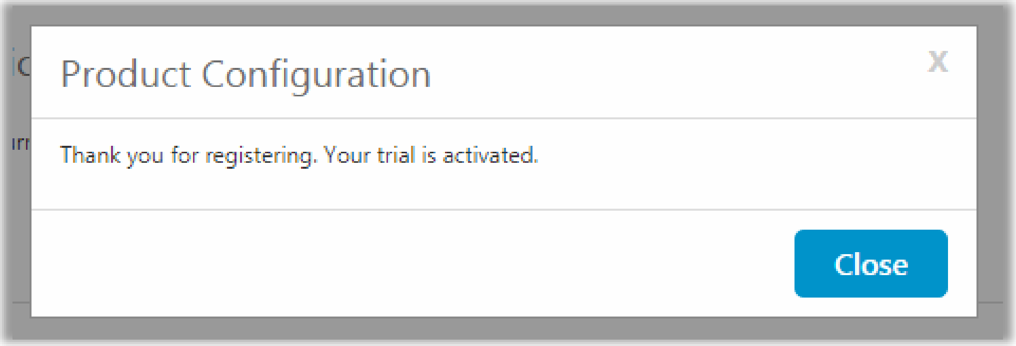
- Get the activation key from the Order Confirmation Mail. *OR*
- Login to your CRMJetty account then go to downloadable options and copy the activation key for the Dynamics CRM Customer Portal plug-in.

Note: Applicable only if purchased from CRMJetty.

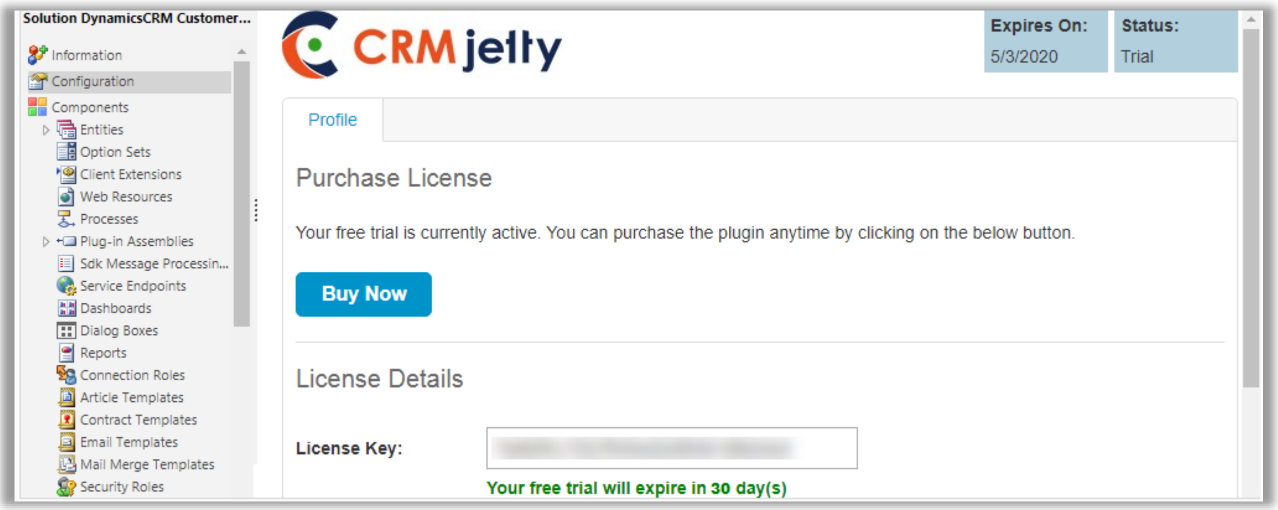
Activate your plug-in

- 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.



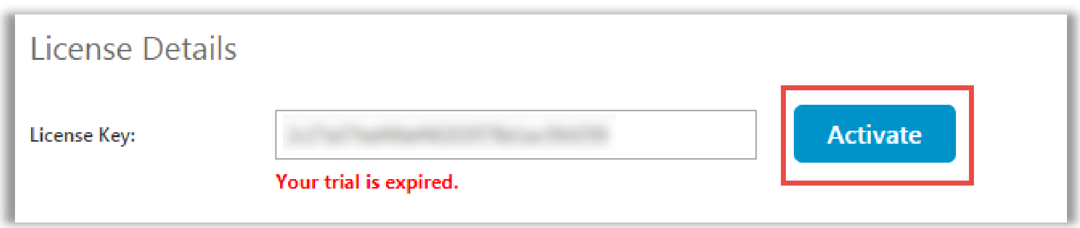
- Your trial will get activated and expiry date will be displayed on top.



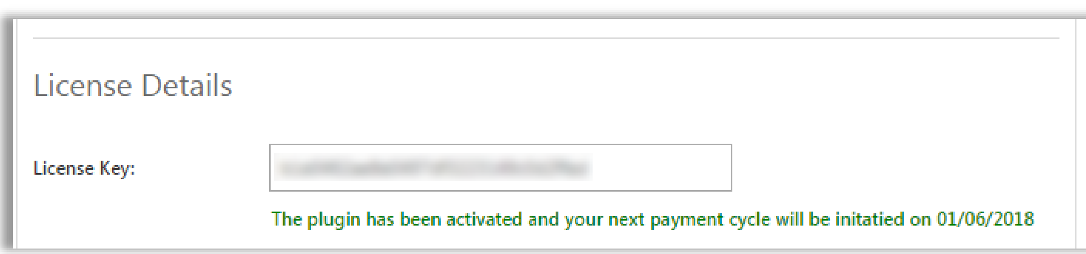
Purchase License Key

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

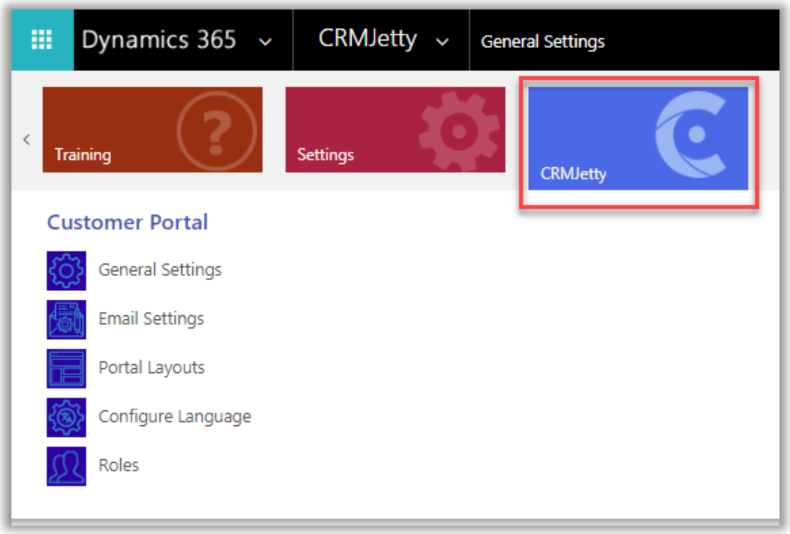
- You can purchase the licensed version any time. To purchase the license, click on **'Buy Now'** button.
- This will redirect you to our product page. Click on **'Add to Cart'** button and complete the purchase process.
- On successfully completing the purchase process, you will receive your license 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.

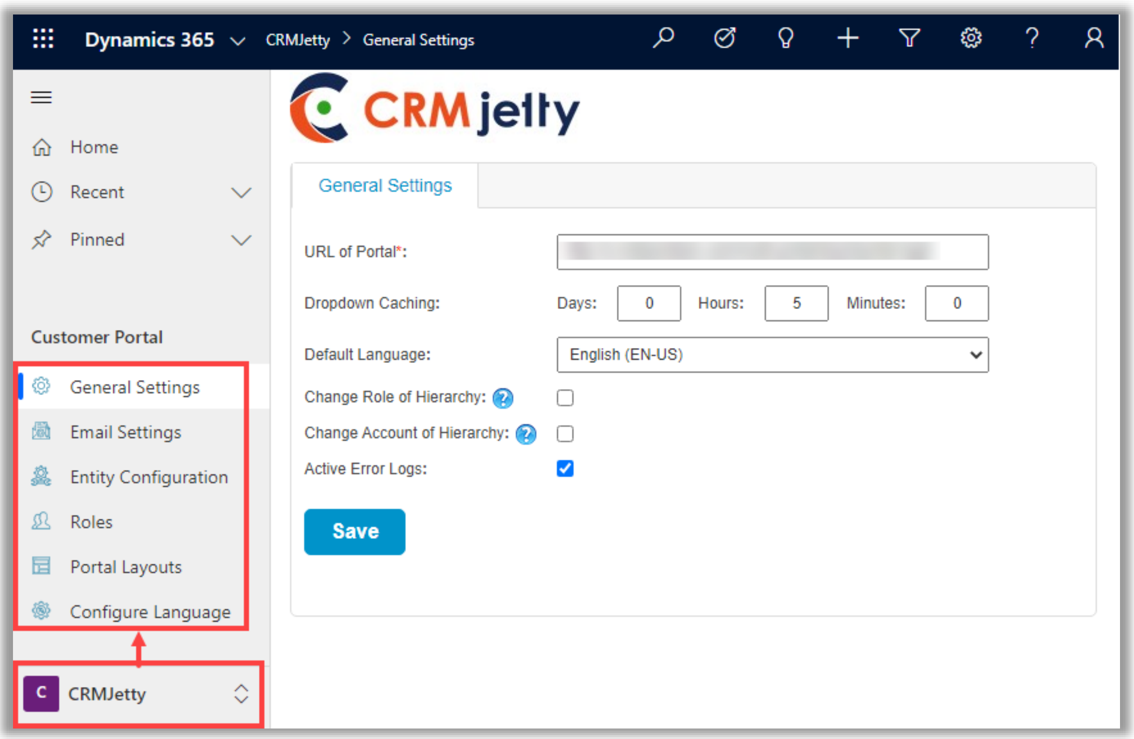


- Once the activation is successfully completed, navigate to the **CRMJetty** tile to access and setup various configuration for portal:
  > General Settings > Email Settings > Portal Layouts
  > Language Configuration > Roles



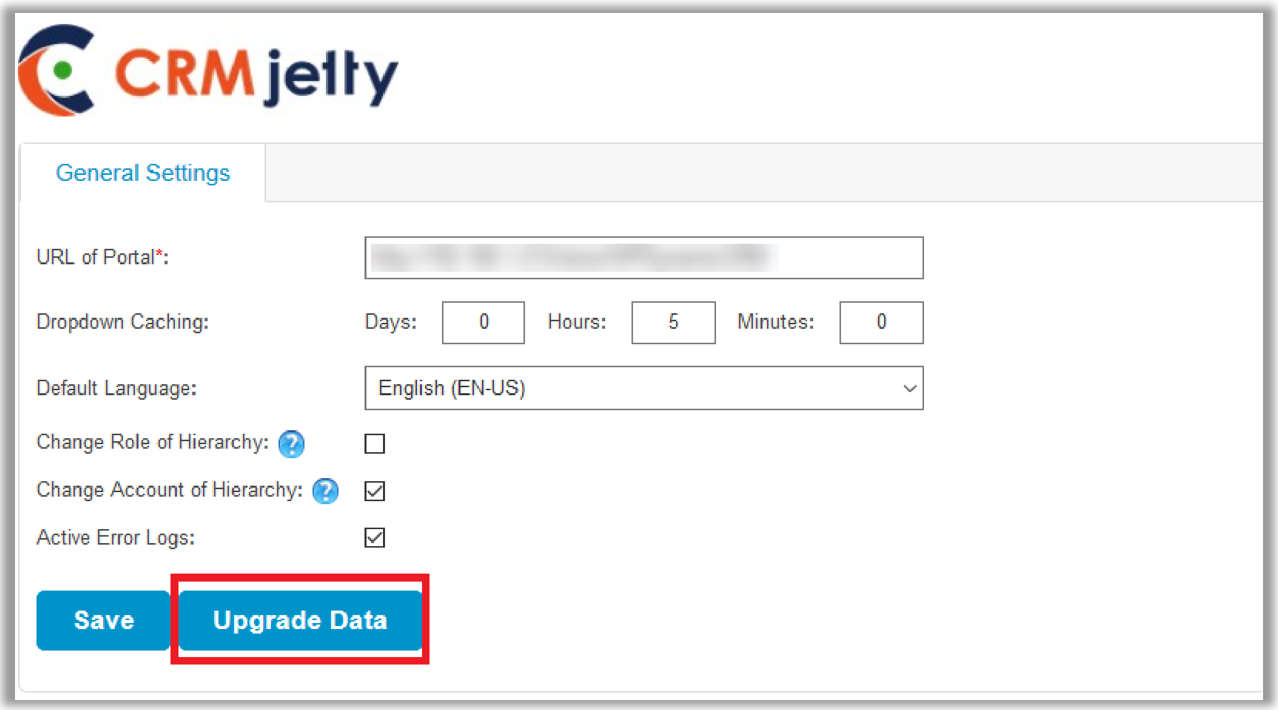
OR

- For the '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.

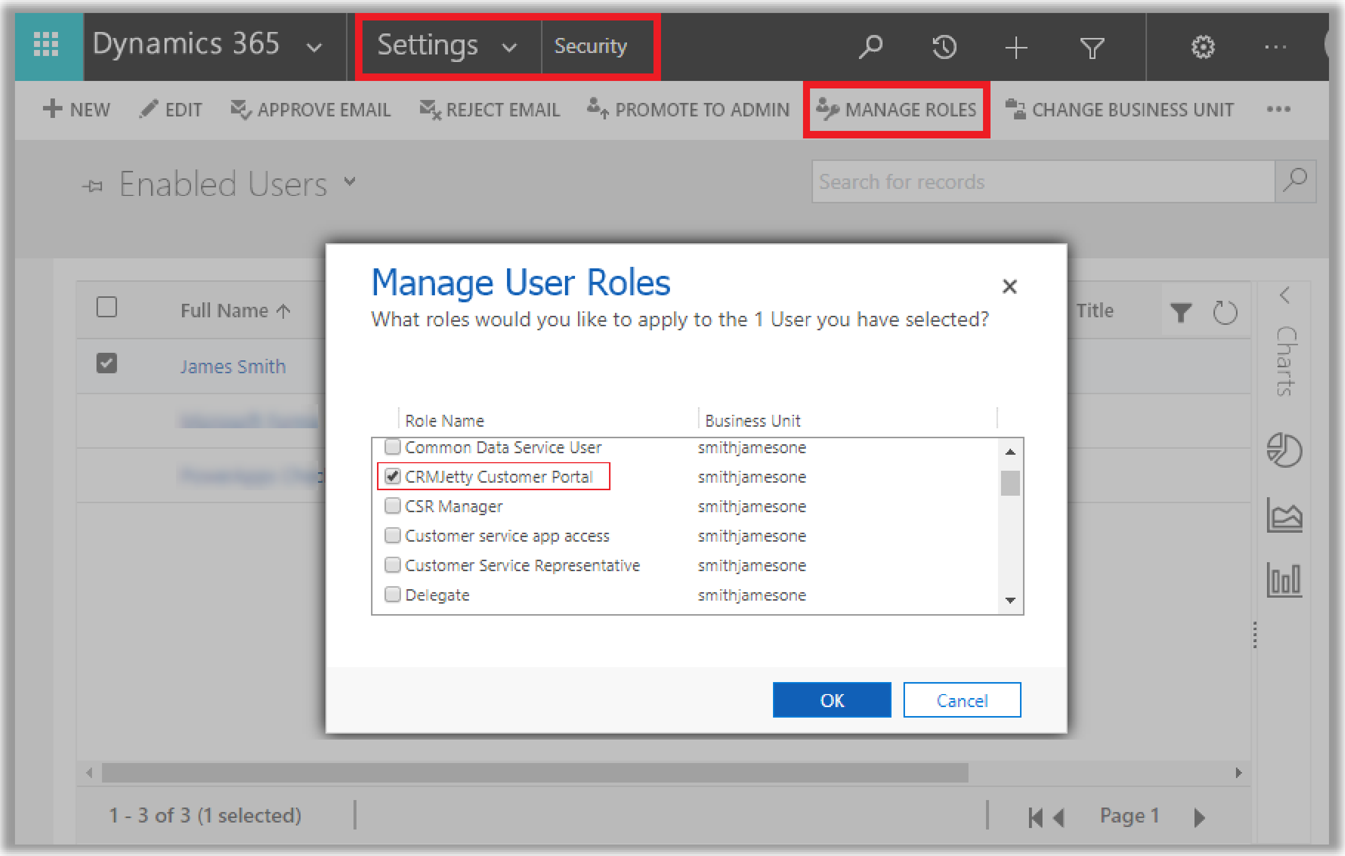


- You can find the **Upgrade Data** button from '**CRMJetty → General Configuration'** and click on it to upgrade the data.

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

Assign User Role

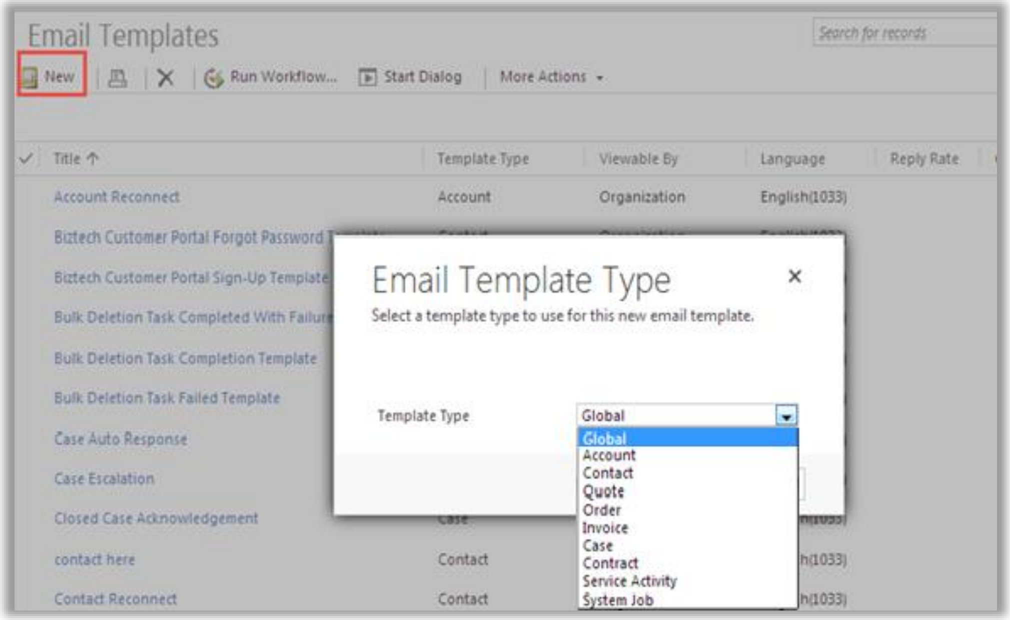
- To manage the user roles, navigate to **Settings → Security → Users.**
- Now select the users whose roles are to be managed and click on **'MANAGE ROLES'.** This will open a pop up to select roles.
- To access CRMJetty product entities assign **'CRMJetty Customer Portal'** role to selected users.



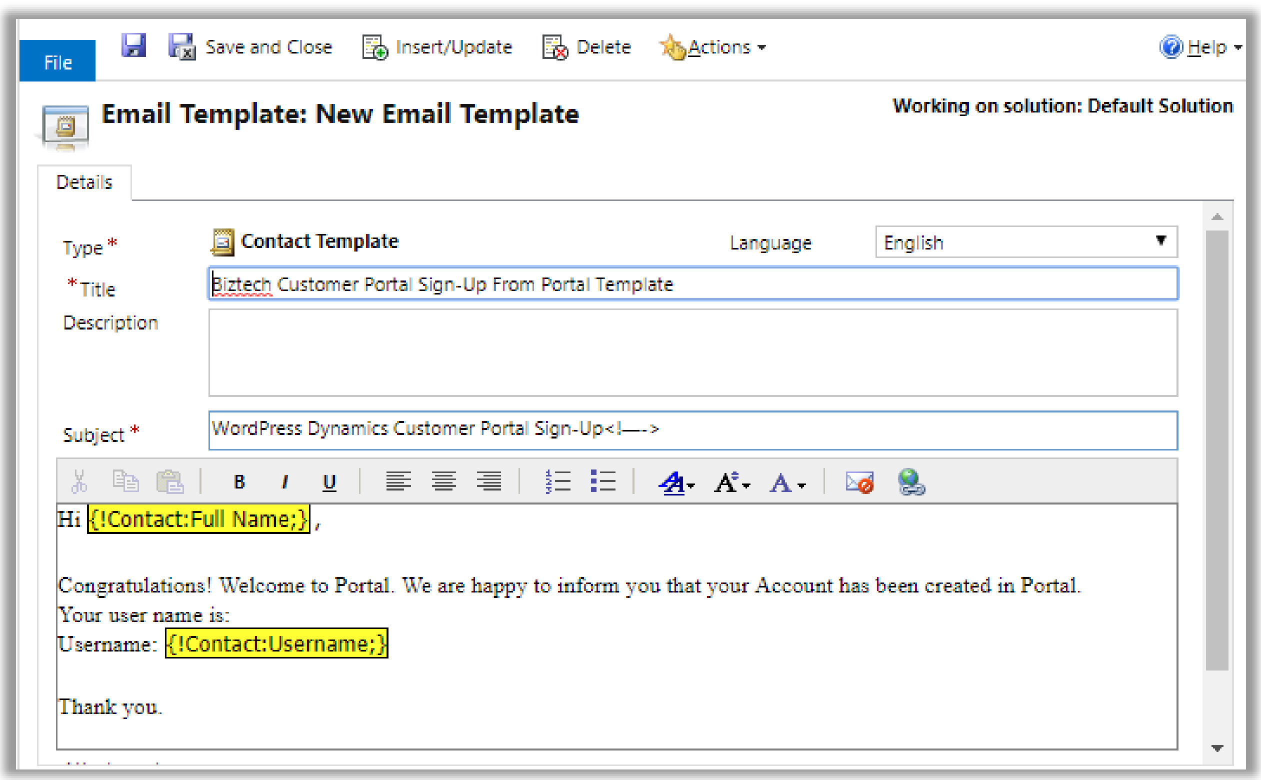
Note: 'System Administrator' will also be able to access CRMJetty Product Entities.

Setting Email Template

- Admin can create any **Email Template** like signup and forgot password template from CRM.
- Navigate to **Settings** → **Templates** → **Email Templates**.
- From **Email Templates,** user gets option to create **New** template and select **Template Type**.

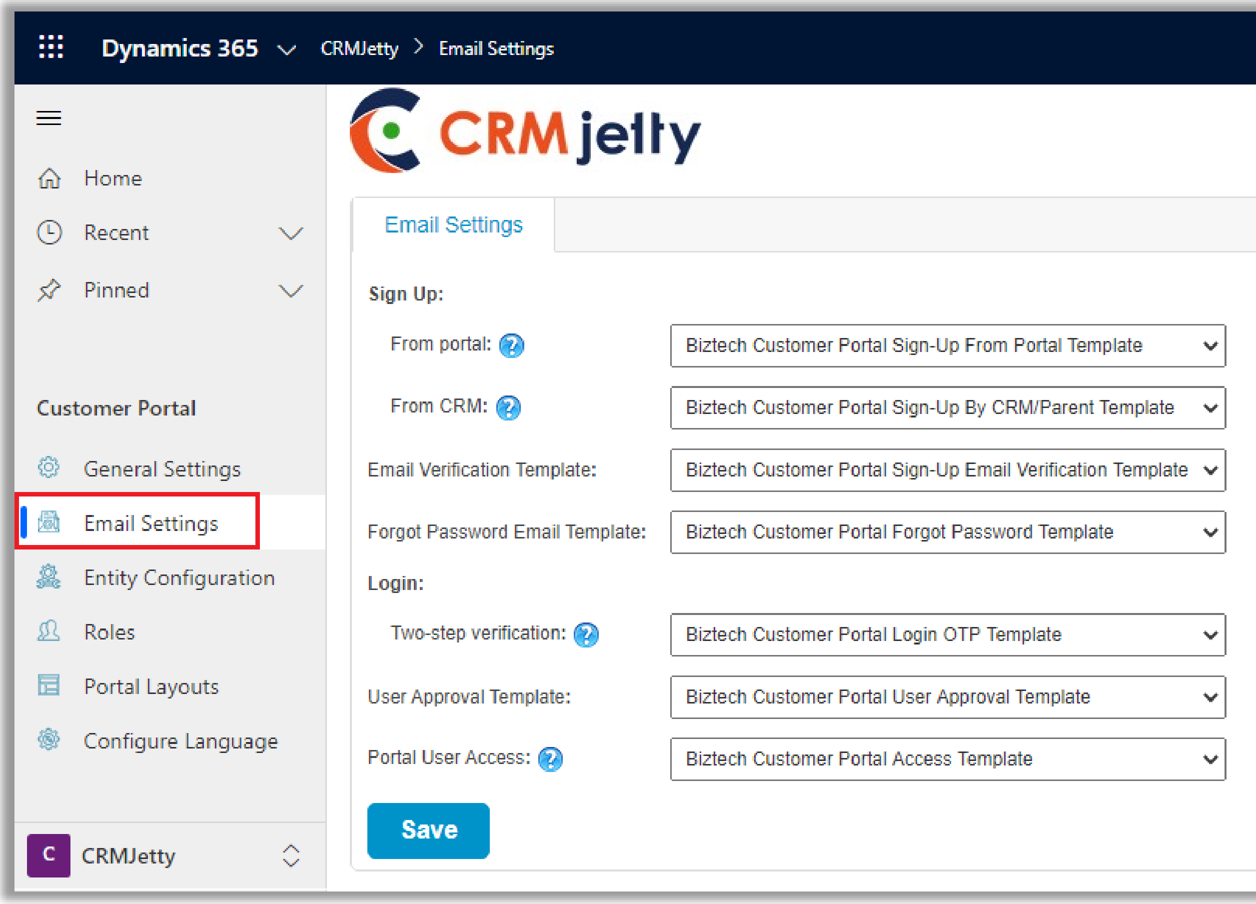


- Select an email template type and create an email template filling the necessary details as per the requirement.



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

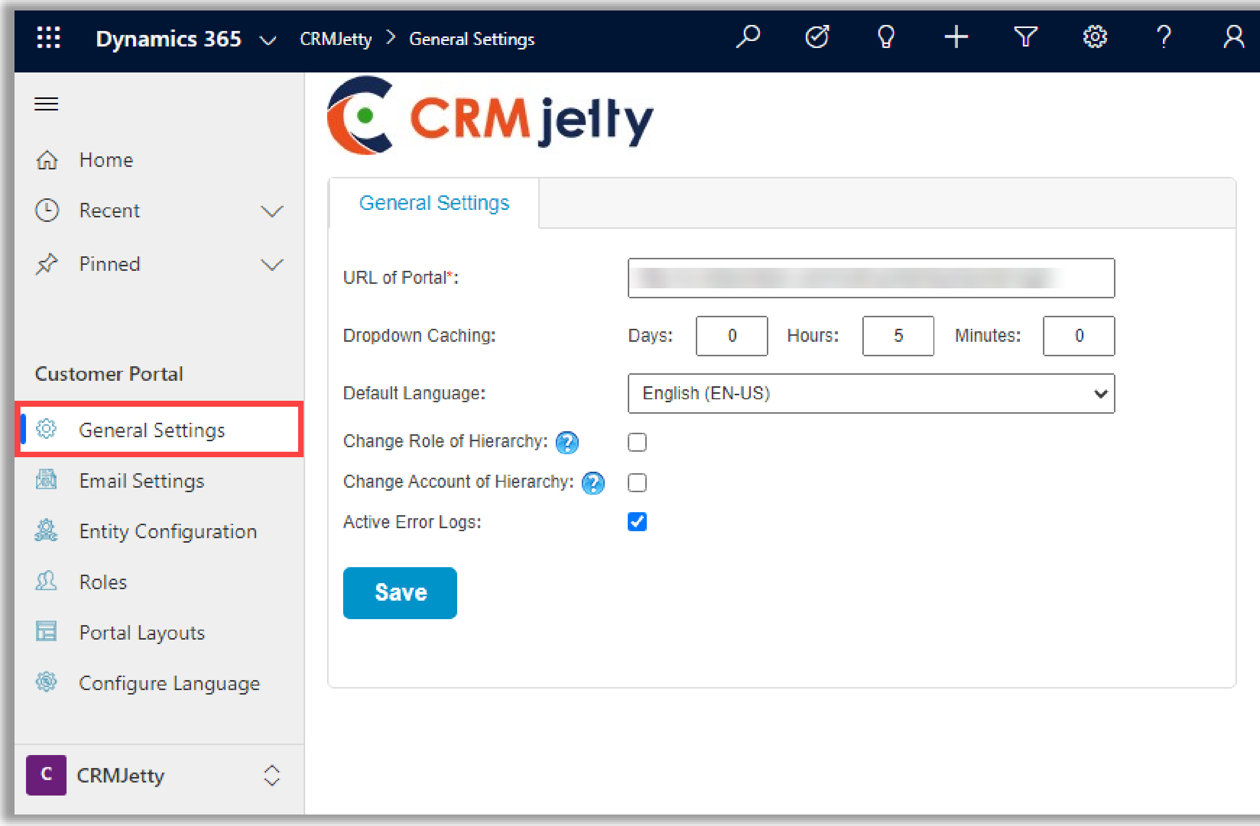
- For assigning the default email template, navigate to **CRMJetty → Email Settings**.



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

General Accessibility for Portal Users

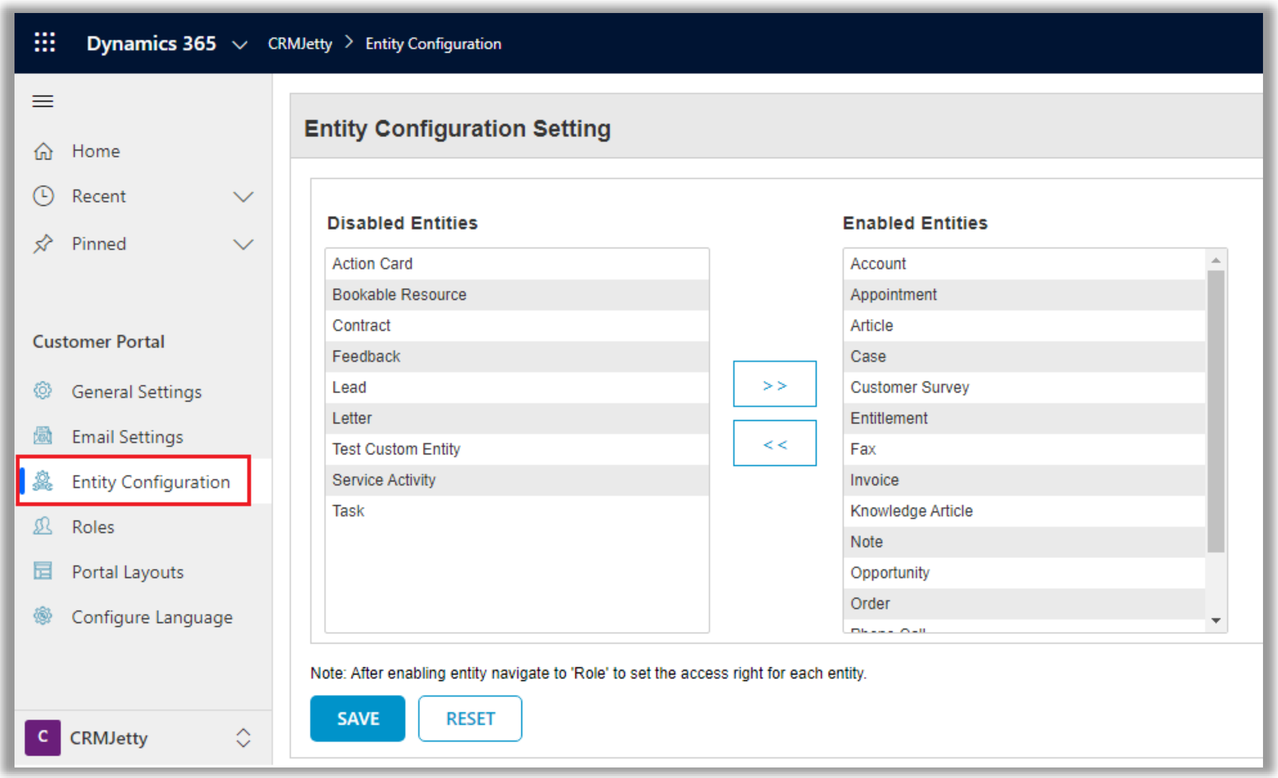
- You can configure the 'general accessibility' for Portal Users from **CRMJetty → General Settings**.
- Mention the URL of your WordPress Account (*i.e.* Portal URL) which will be sent along with the credentials' mail and click on **'Save'** button.
- Use **Dropdown Caching** to set up values of Look 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 it is 'unchecked', and account is updated then it will work as a separate entity from the hierarchy.

Entity Configuration- Custom Entities

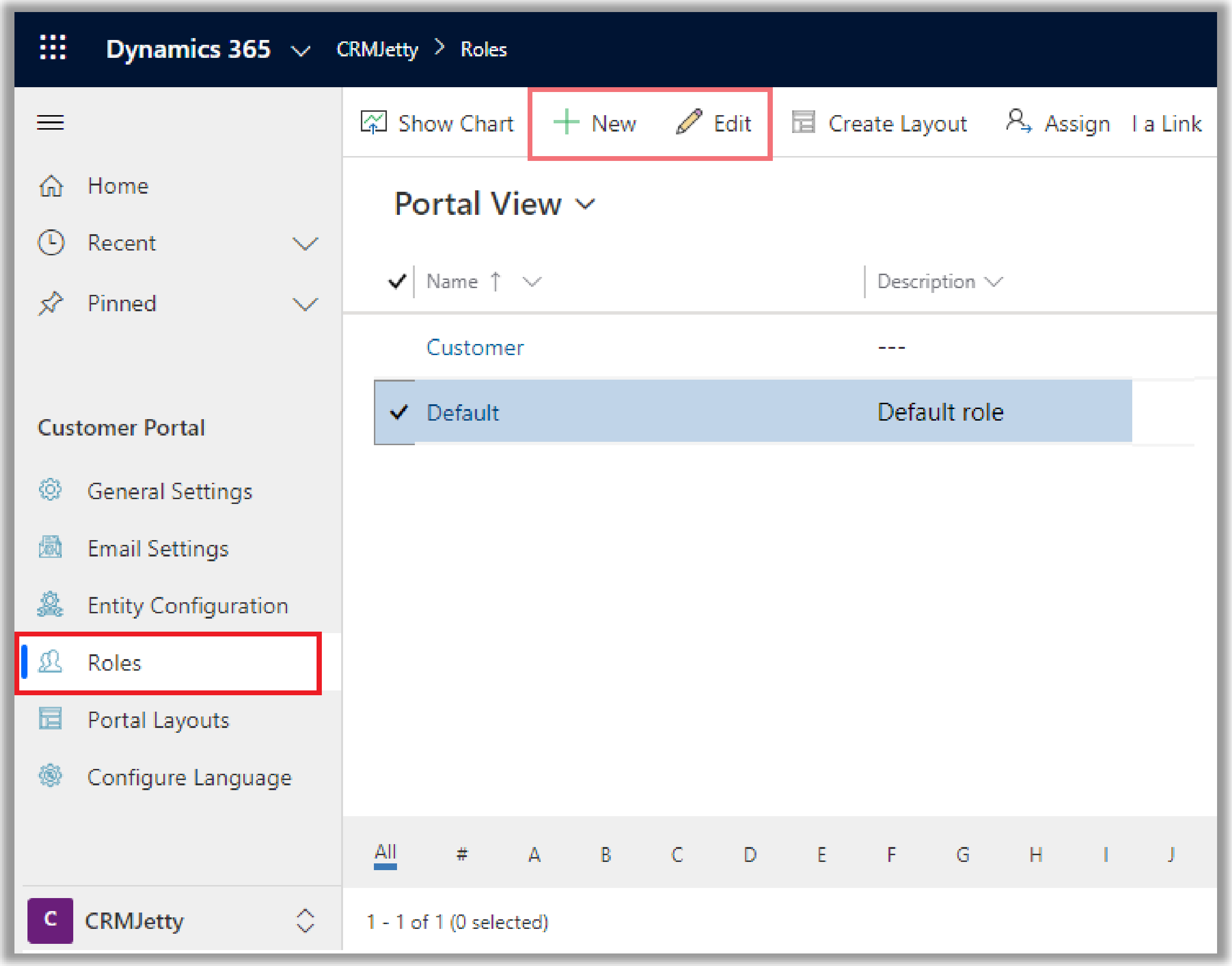
- You can configure the default Dynamics365 entities and the custom entities from **CRMJetty → Entity Configuration**. As per your requirement, you can enable/disable the entities for the customer portal.
- You will get the list of default and custom entities that are created in Dynamics365 on the left side, which are related to the Contact entity.
- To enable the entity, select the entity from the left side list of 'Disabled Entities' and click on the Right arrow **>>** the selected entity will be moved under the list of 'Enabled Entities'. Similarly, if you want to disable any entity, click on the Left arrow **<<** the selected entity it will be moved under the list of 'Disabled Entities'.



- After enabling the entities and saving the settings, you can edit the accessibility of all the default and custom entities by navigating to User Roles → Accessible Entities.
- Users can view all the enabled default and custom entities record listing and detail of records in customer portal as per the accessibility for the Portal users.

Module Accessibility for Portal Users

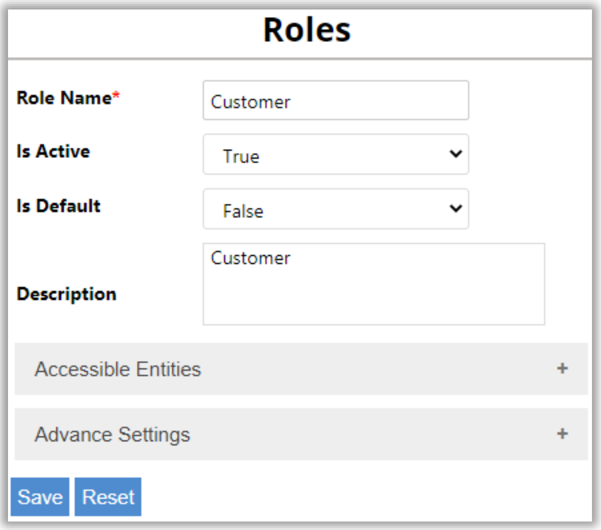
- For setting access rights, navigate to CRMJetty from menu and select 'Roles' option.
- You can create Roles and assign accessible modules to that role.



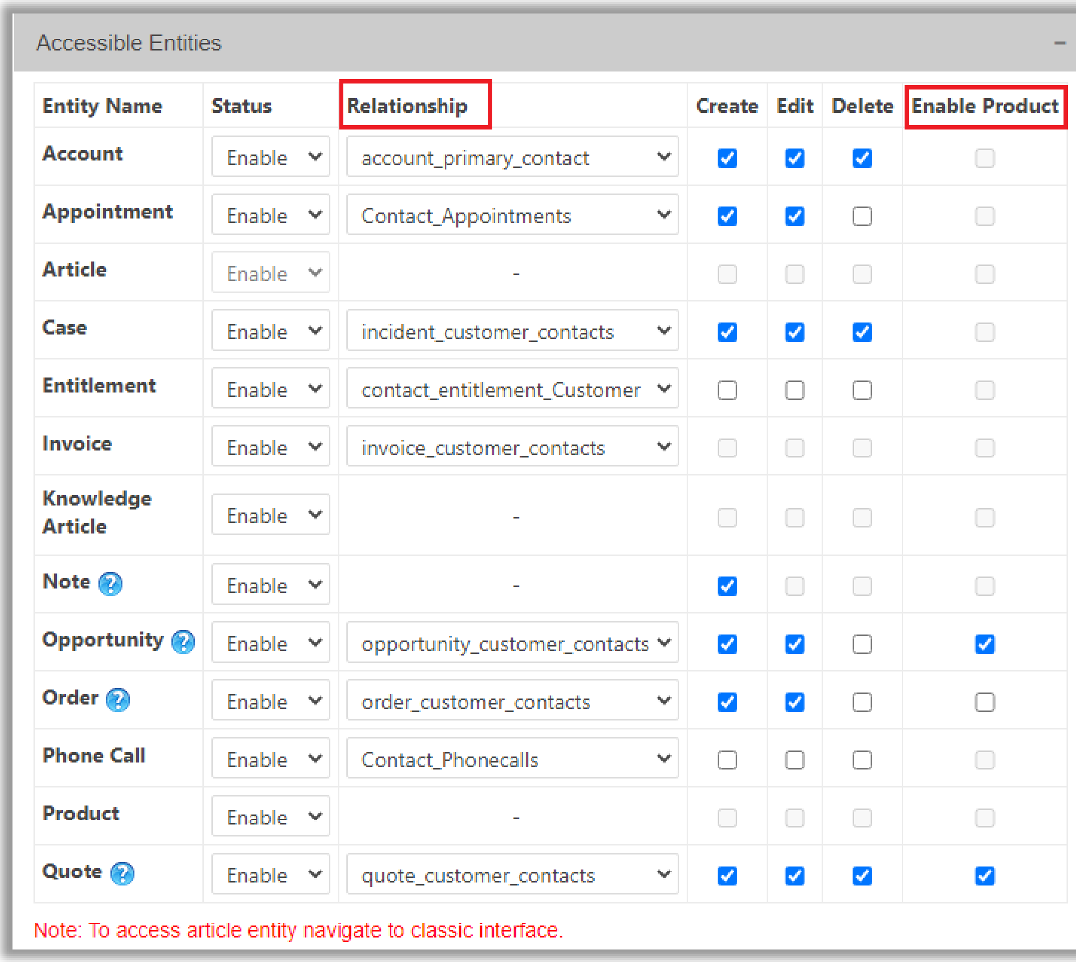
- To create a role, click on the **+ New** option or to edit the existing, select the role *or* click on the **Edit** option. The new window will open to edit and manage the Roles.

Note:

- By default, **'Default'** group will be assigned to a newly created contact record.
- If you have the new version of the Customer Portal (v4.0.0), you can edit the Default Role as well.



- Insert the Role details like Role Name, activate the Role by selecting 'Is Active' as True, select default and insert description if required. After inserting these details, click on **Save** button to create a Role.
- You can select the **Accessible Entities** for the Customer portal with User rights and in the **Advance Settings**, you can enable other required options.
- Under the **Accessible Entities**, default and custom entities that are enabled in the Entity Configuration will directly reflect in the role matrix.



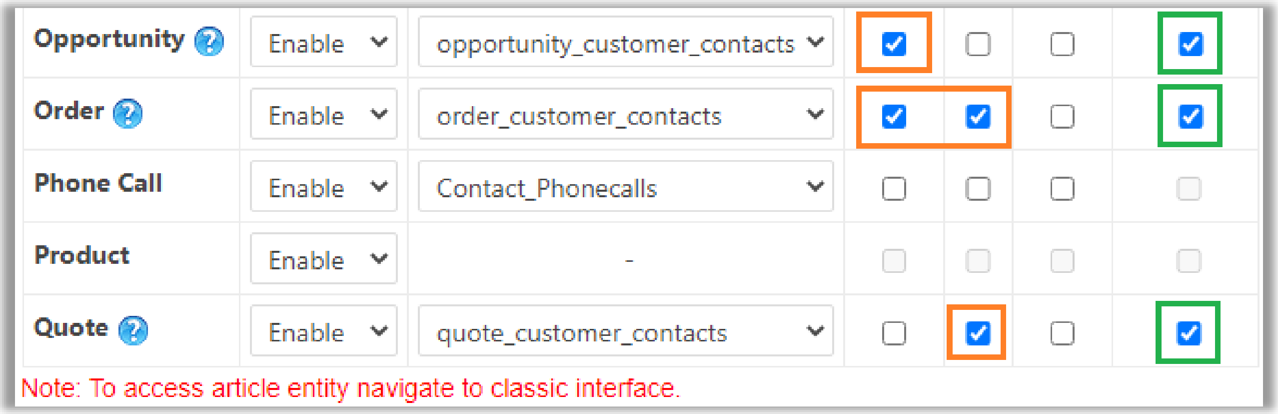
Accessible Entities

Entity Name	Status	Relationship	Create	Edit	Delete	Enable Product
Account	Enable	account_primary_contact	☑	☑	☑	☐
Appointment	Enable	Contact_Appointments	☑	☑	☐	☐
Article	Enable	-	☐	☐	☐	☐
Case	Enable	incident_customer_contacts	☑	☑	☑	☐
Entitlement	Enable	contact_entitlement_Customer	☐	☐	☐	☐
Invoice	Enable	invoice_customer_contacts	☐	☐	☐	☐
Knowledge Article	Enable	-	☐	☐	☐	☐
Note	Enable	-	☑	☐	☐	☐
Opportunity	Enable	opportunity_customer_contacts	☑	☑	☐	☑
Order	Enable	order_customer_contacts	☑	☑	☐	☐
Phone Call	Enable	Contact_Phonecalls	☐	☐	☐	☐
Product	Enable	-	☐	☐	☐	☐
Quote	Enable	quote_customer_contacts	☑	☑	☑	☑

Note: To access article entity navigate to classic interface.

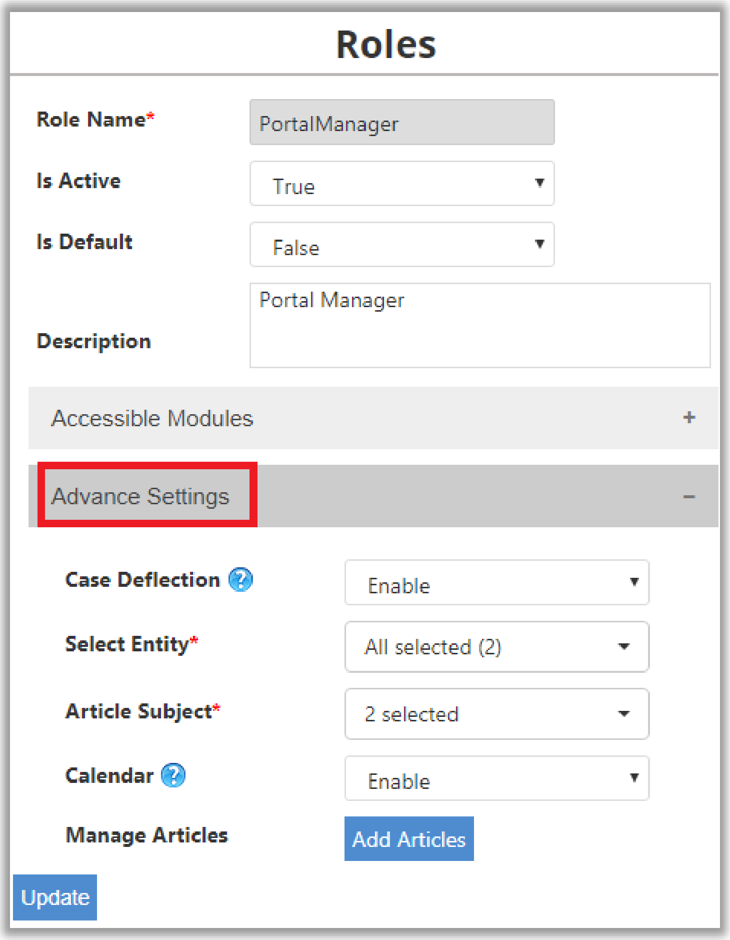
- From the Role matrix, enable the Entity modules by selecting the **Enable** option from 'Status' dropdown and assign the rights to **Create**/**Edit**/**Delete** as per requirement.
- **Relationship** selection is provided to select the relationship between **contact** and the **entity**.

- You can also enable the 'Product' for the entity from the User's Role Matrix.
- To enable the **Product selection**, you must have enabled the **Create** *or* **Edit** rights of that entity. Once you enabled the 'Create' or 'Edit' rights, you can enable the Product for that entity.



- By enabling the Product, the user will get the Product selection in the sub grid view of the selected Entity in the customer portal and portal users will be able to select the products and insert the Qty.

- You can also define **Advance Settings** 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.

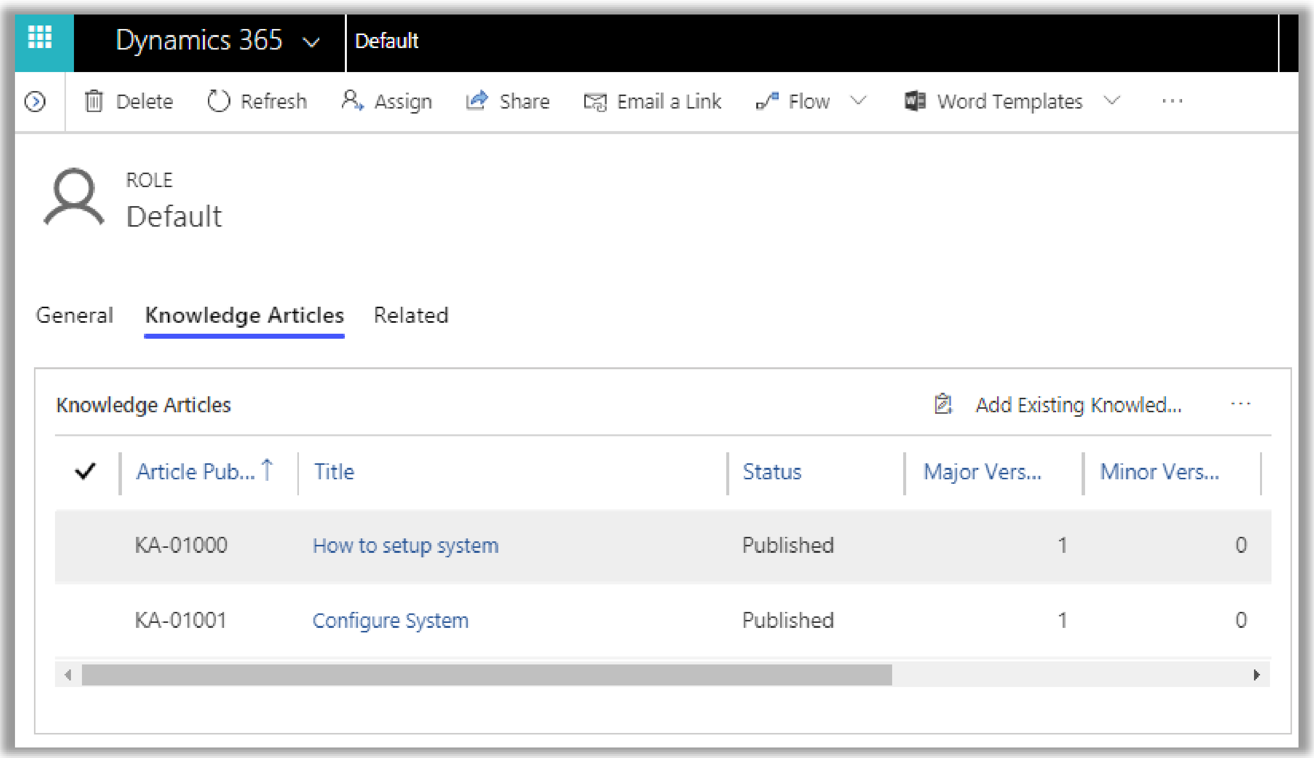


- It will search a solution for the enabled **Case Deflection subject** (which belongs to articles or Knowledge articles categories of CRM). So, on enabling "Case deflection" option, you will be setting entity and respective categories to be searched from, while the portal user looks for a solution.

Note:

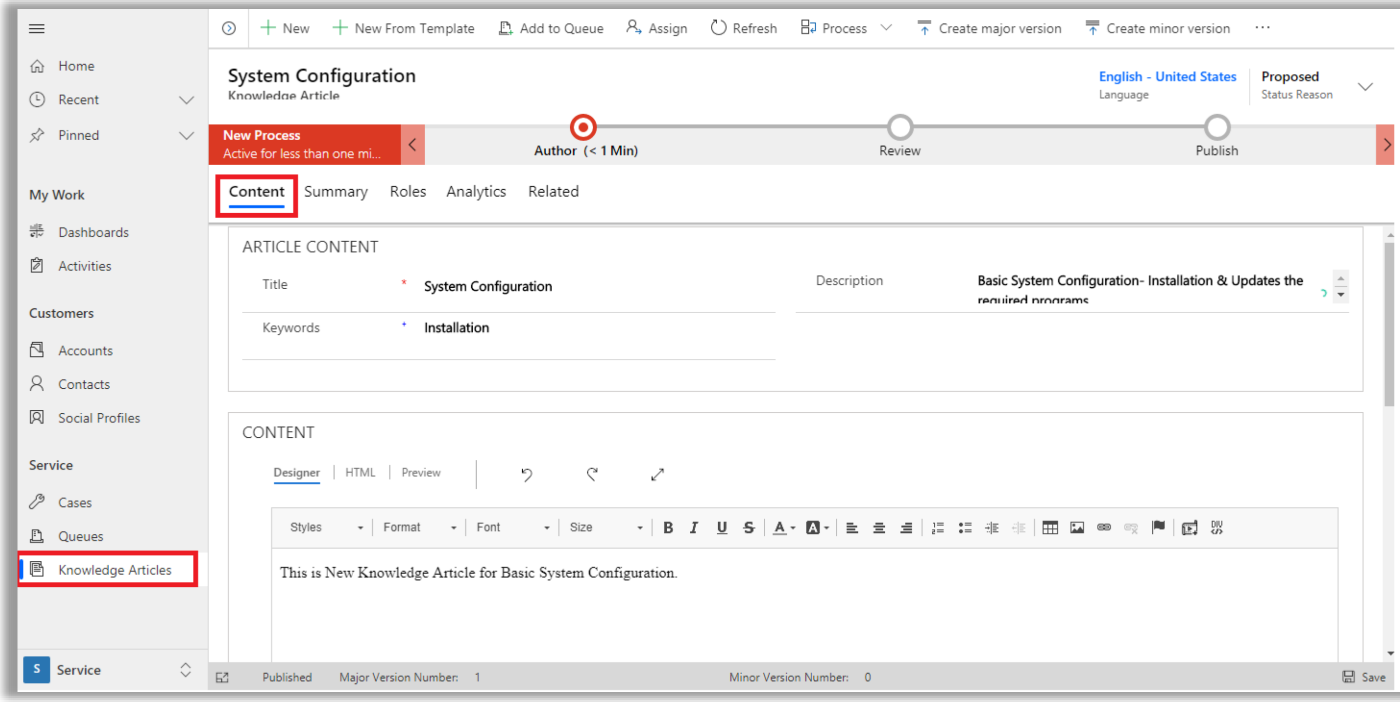
- Case Deflection will only work if **Articles** *or* **Knowledge Articles** module is enabled.
- If you are using "unified interface", only the **Knowledge Articles** can be accessed. While in "classic interface" both modules can be accessed.

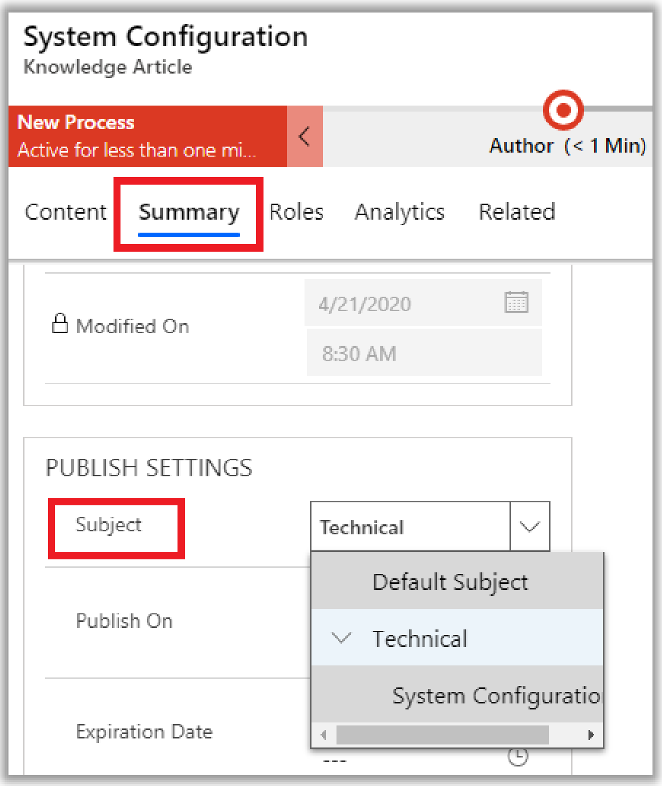
- For adding articles either for article entity or knowledge article entity navigate to role page and click on **'Add Article'** button.



OR

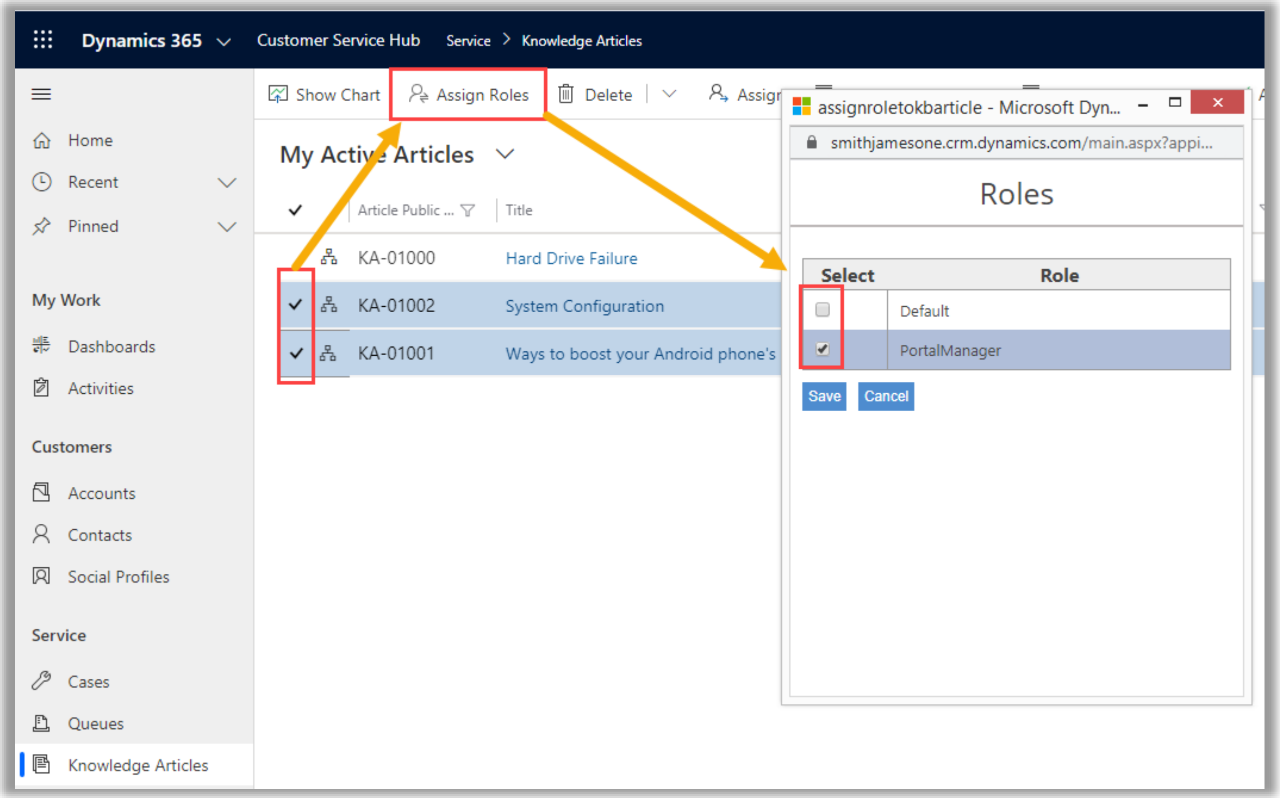
- For Unified Interface.





- To select the relevant subject for the **Knowledge Article**, navigate to **Summary → Subject**.
- From here, you can select the subject for the knowledge article.
- After inserting all the details, Save the article and publish the article.
- Once you published it, you need to assign the roles for this knowledge article.

- Select the article(s) which you want to publish under the selected Roles. For that, click on **Assign Roles** and select the Role(s).

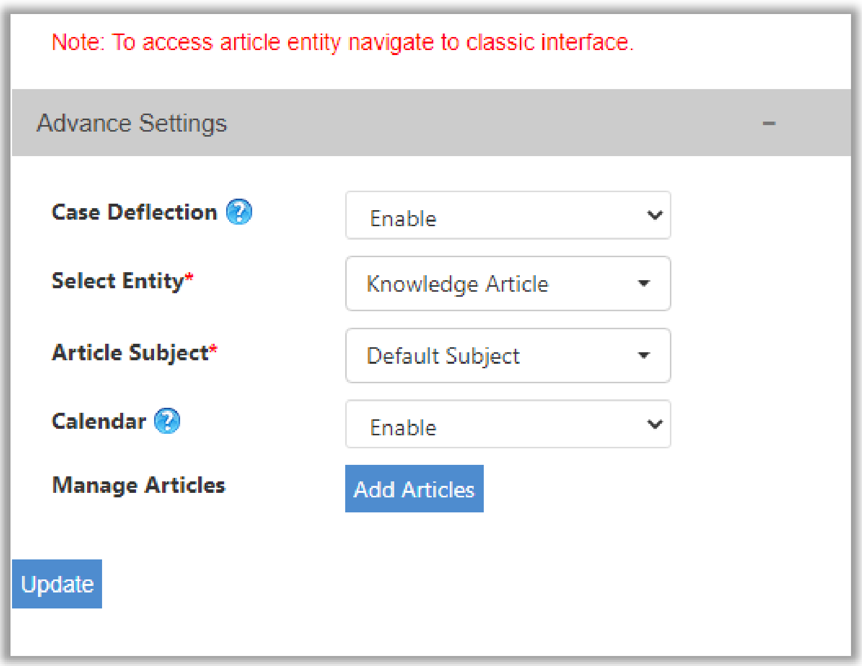


- Add existing article to this user group and it will get visible on portal side.

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

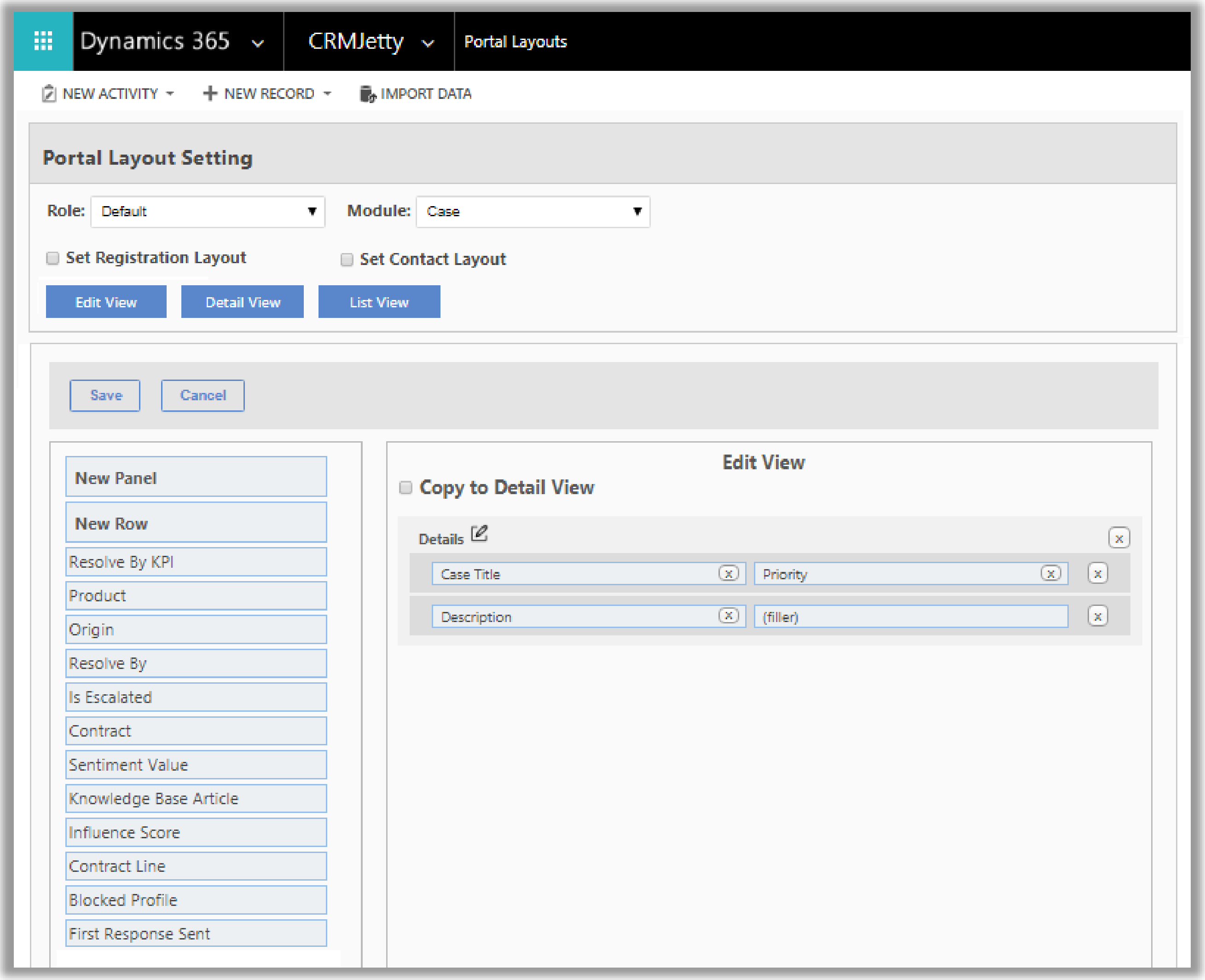
- You can also enable calendar for specific user groups.

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



Setting Portal Layout

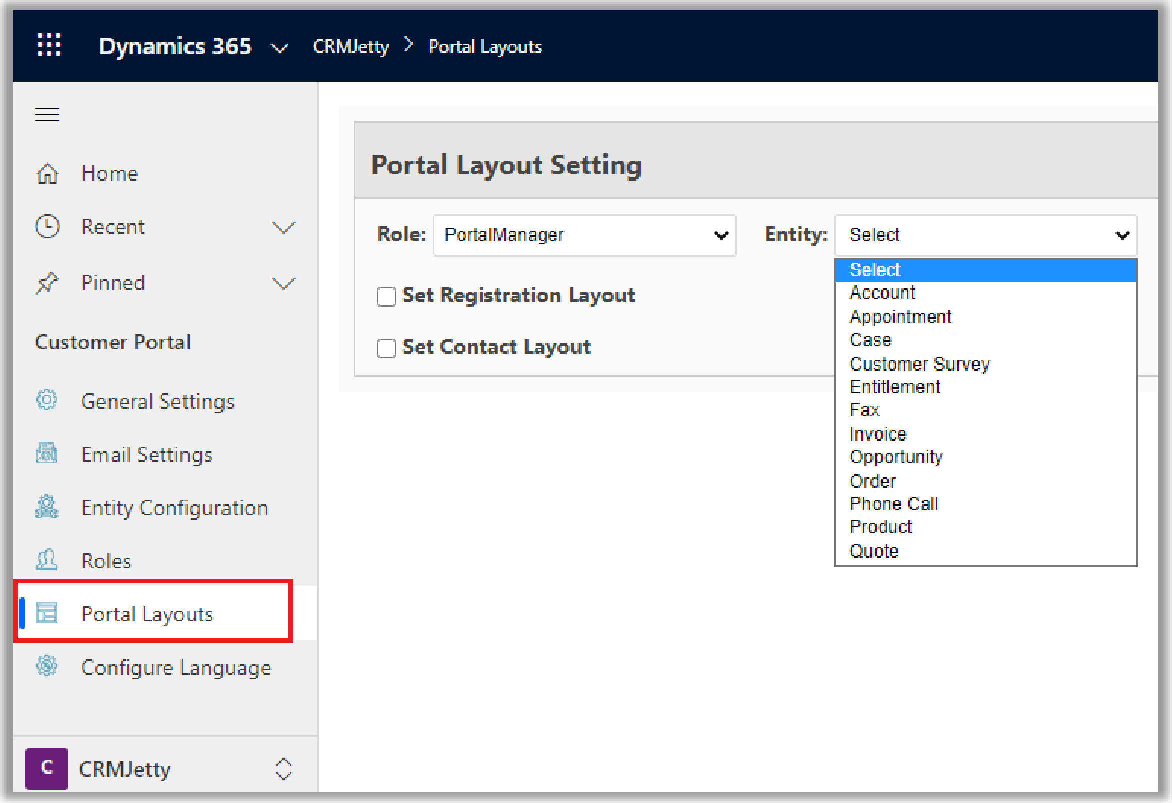
- Customer portal provides feature to manage Dynamics CRM Module's accessibility for their WordPress portal users. You can decide access of which module should be provided to which Customer by creating a role and assigning modules to that role.
- To avail "Dynamics CRM modules" into your **WordPress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

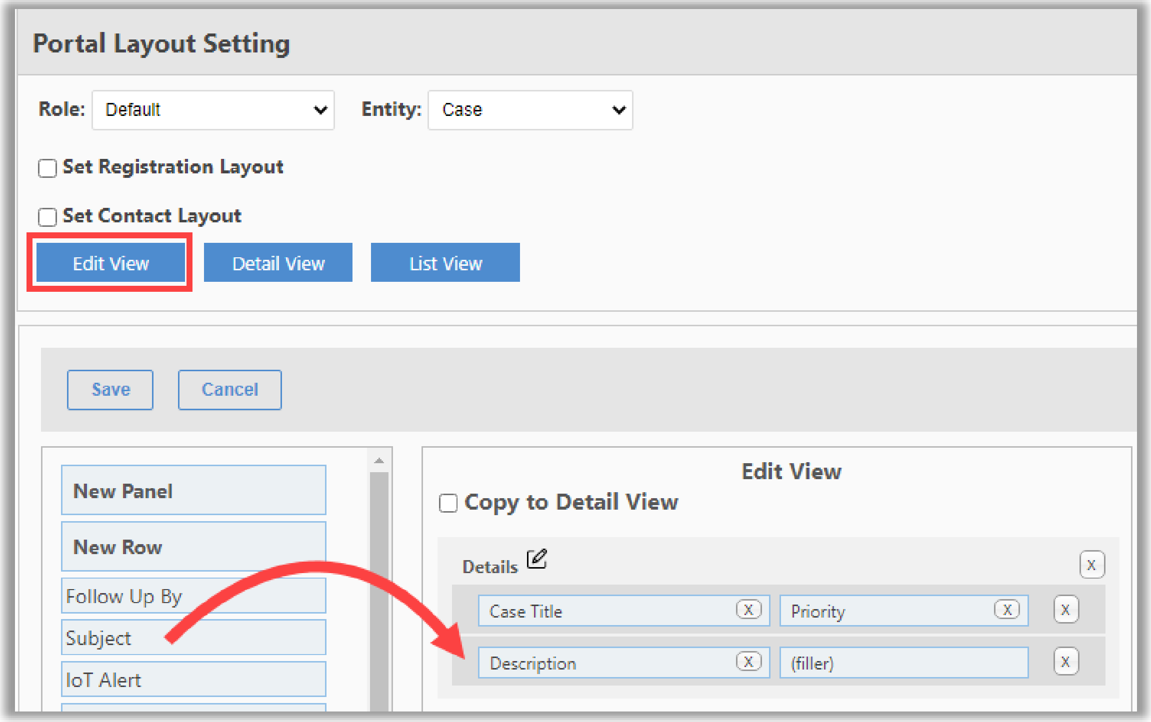
OR

- In Unified Interface, navigate to **CRMJetty → Portal Layouts**.
- After navigating to the **Portal Layout Setting**, select a Role from the **Select Roles** dropdown menu and select a desired Entity for layout setting from the Entity dropdown.

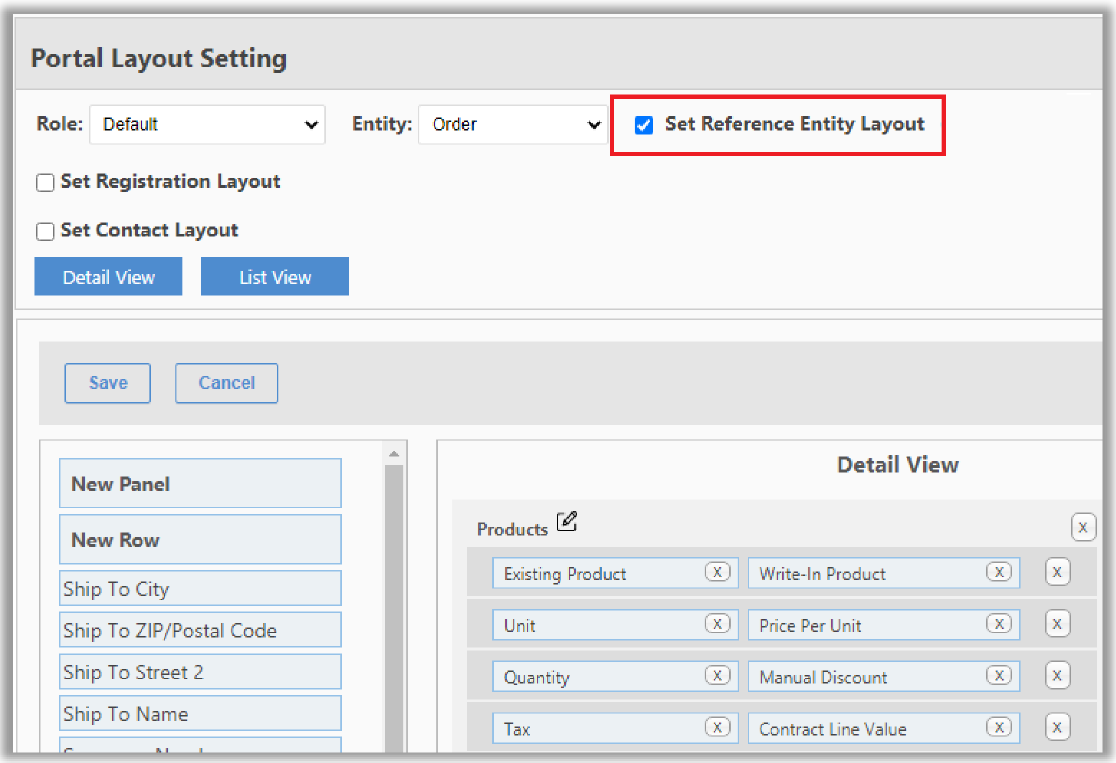


- You will get the default and custom entities that are enabled from the 'Entity Configuration' and the enable that in the individual 'Roles'.
- You can also select **'Set Contact Layout'**, which will allow you to design child layout (i.e. Sub contact layout) template for **'Edit view and Detail view'**.

- 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 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.

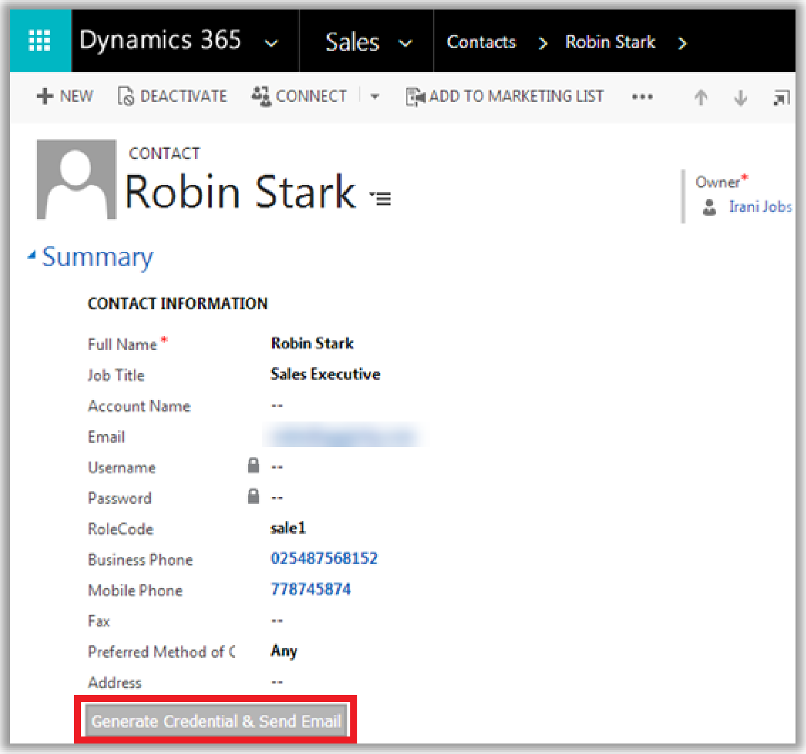


- If you have added the custom entities, you must settings the Portal Layout by selecting that custom entity as per the user’s role selection.

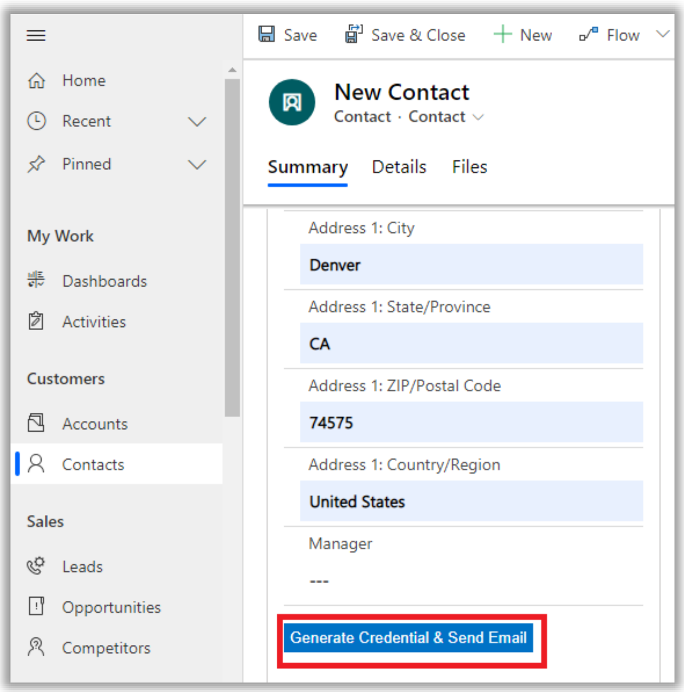
Note: Here all the fields are supported and will be fetched in the Customer portal.

Generating Portal Credentials

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

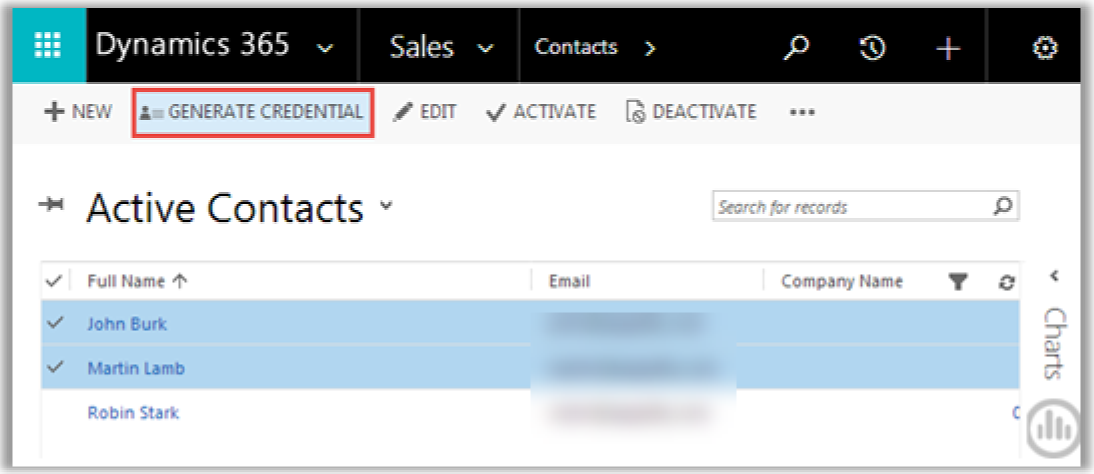


- For Unified View,



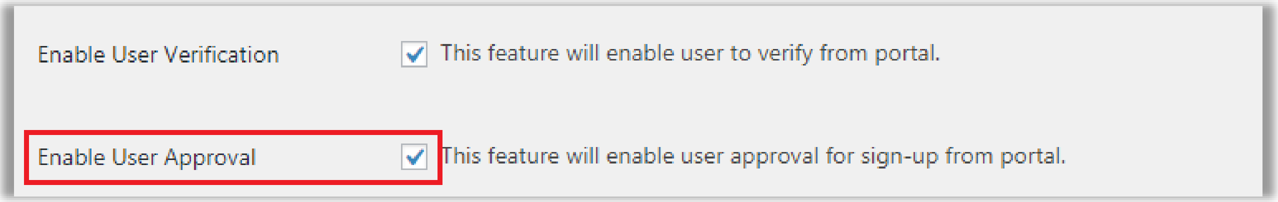
- To **mass generate** portal credentials for CRM contacts, navigate to Contacts module and select the contact records for which you want to generate credentials.

- 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.

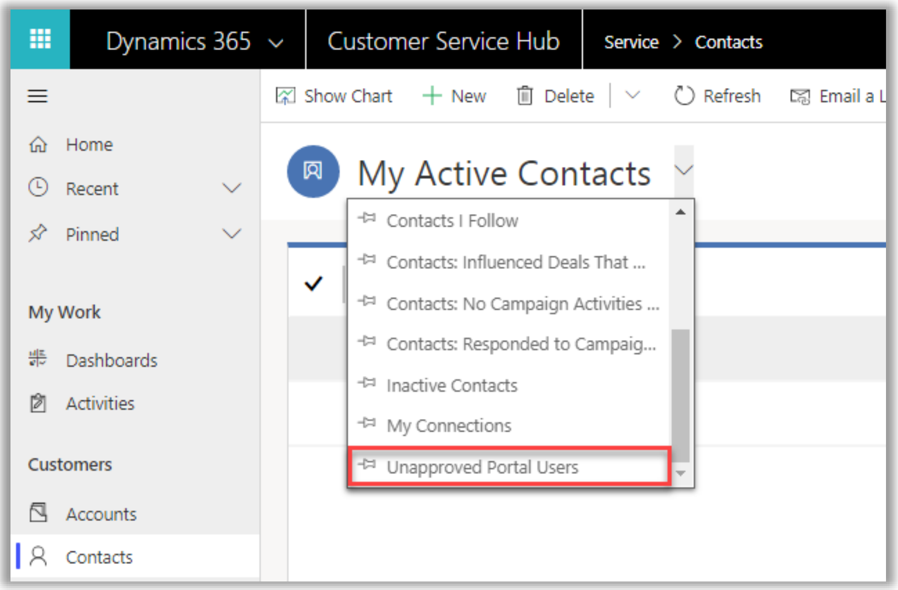


Approval & Verification for Portal Users

- 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.

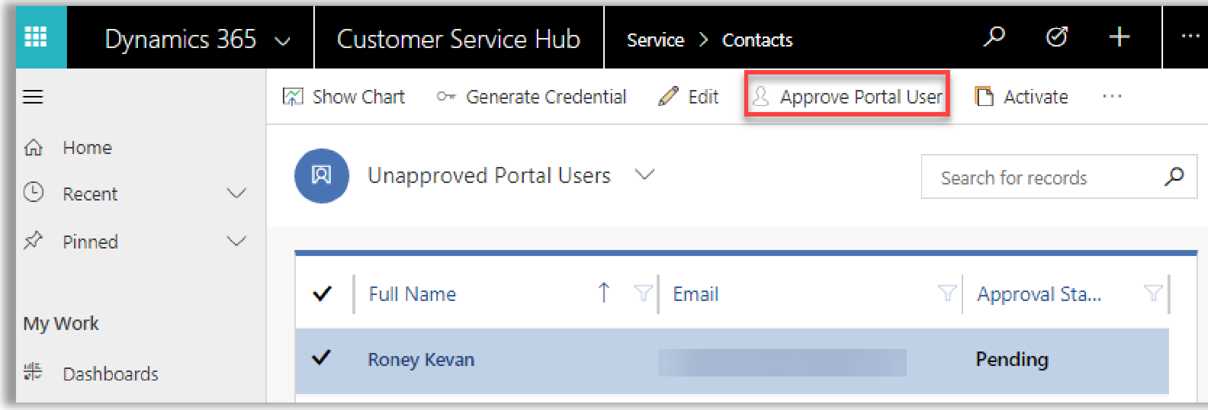


- Now whenever a portal user registers from portal, they will be added to **Contacts** module in CRM with **pending** status.



- Now you can filter contacts and get the list of pending contacts for approval by clicking on **Unapproved Portal Users**.

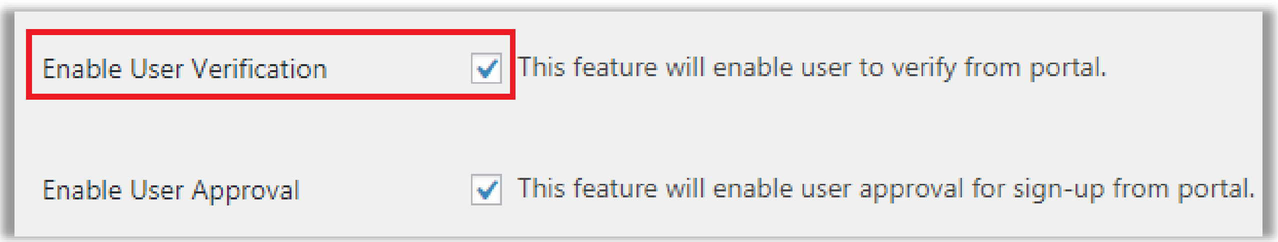
- To approve contacts, select such contacts from the filtered contacts list view and click on the 'Approve Portal User' button.



- 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.



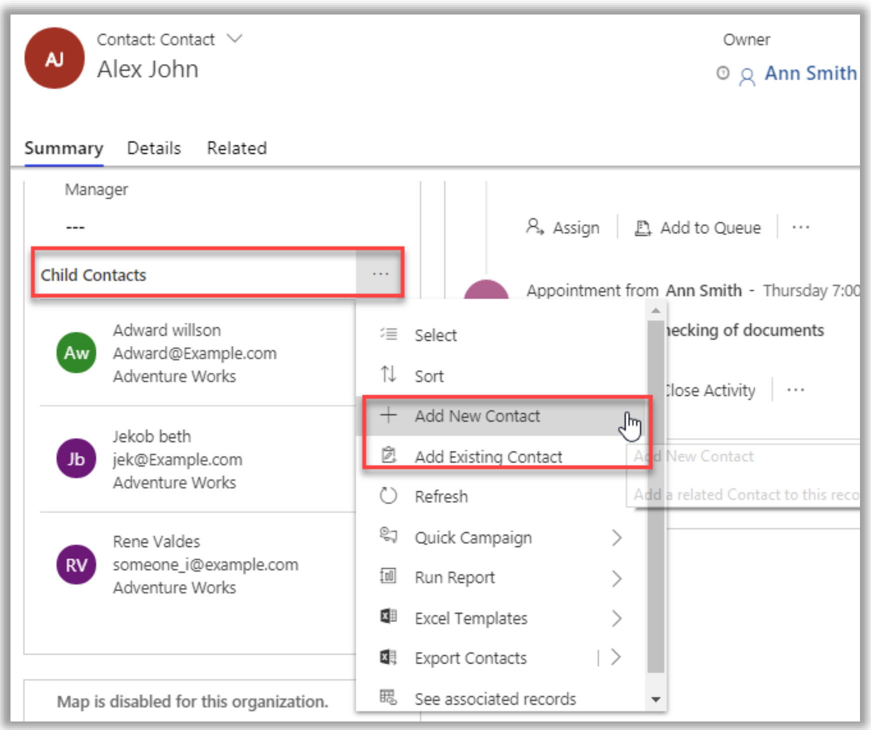
Field Configuration

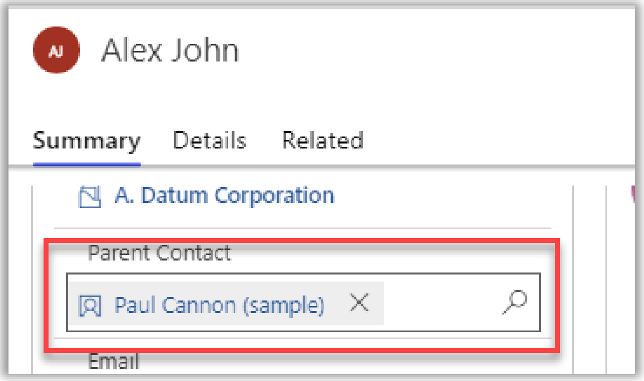
- For assigning any record to a particular portal user from CRM or to view the user in CRM to whom a record is assigned from portal, you need to configure some fields in CRM.
- Each module should have the below fields in its form. If no such field exists, then you need to add a field from **Form Editor** 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

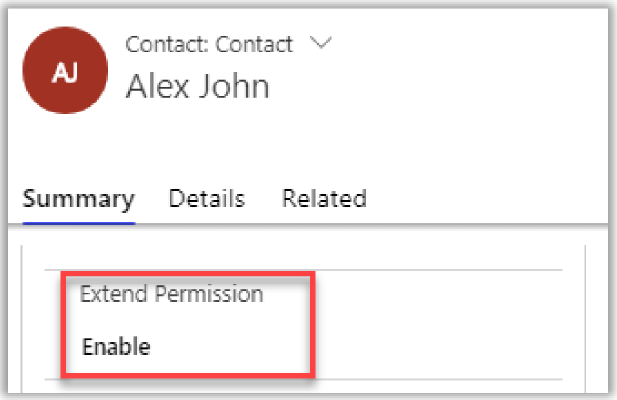
- For assigning child records to any parent record, navigate to detail view of contact entity.





- 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.



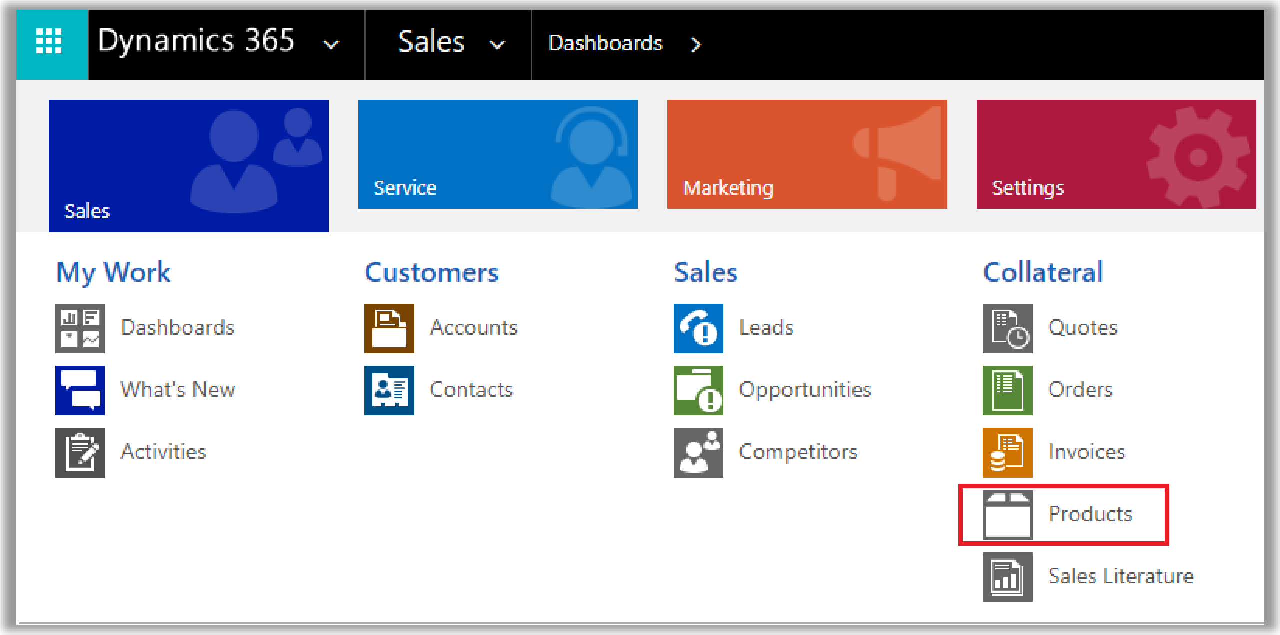
- This permission allows portal user to the create contact and generate credentials, enable/disable portal access for direct next level of child (i.e. one level of child) contacts.
- They can also view the details of entity records of the whole hierarchy.

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

Products Module

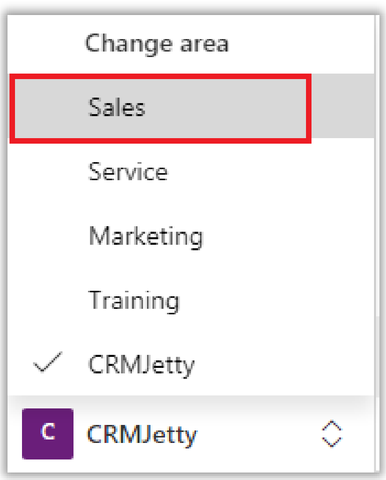
If you are using **Classical view**:

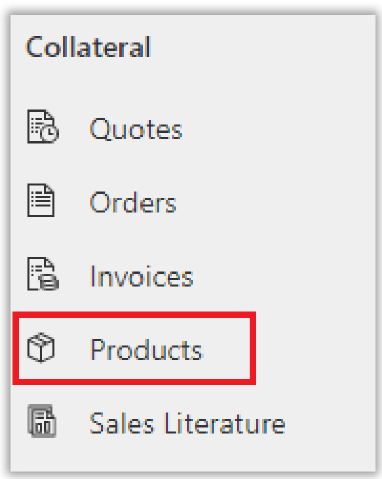
- Navigate to the **Sales** from the header menu and click on the **Products** module.



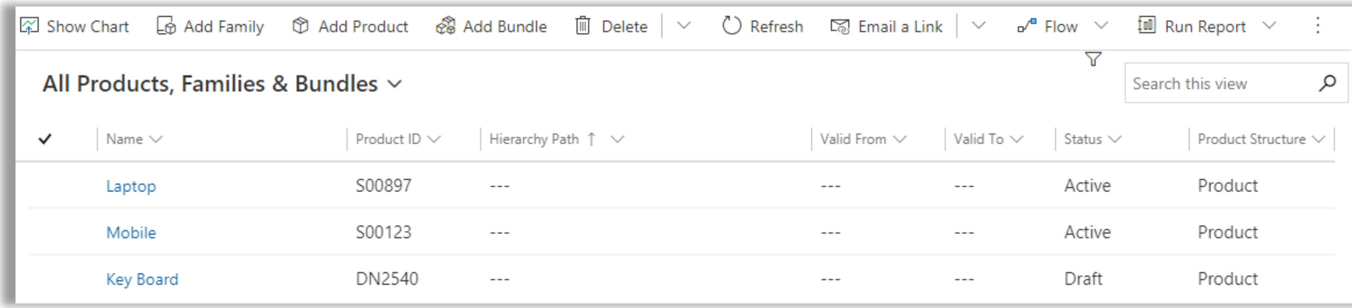
If you are using **Unified Interface**:

- Navigate to the **Sales** from the navigation pane (below-left corner) and click on the **Products** module.



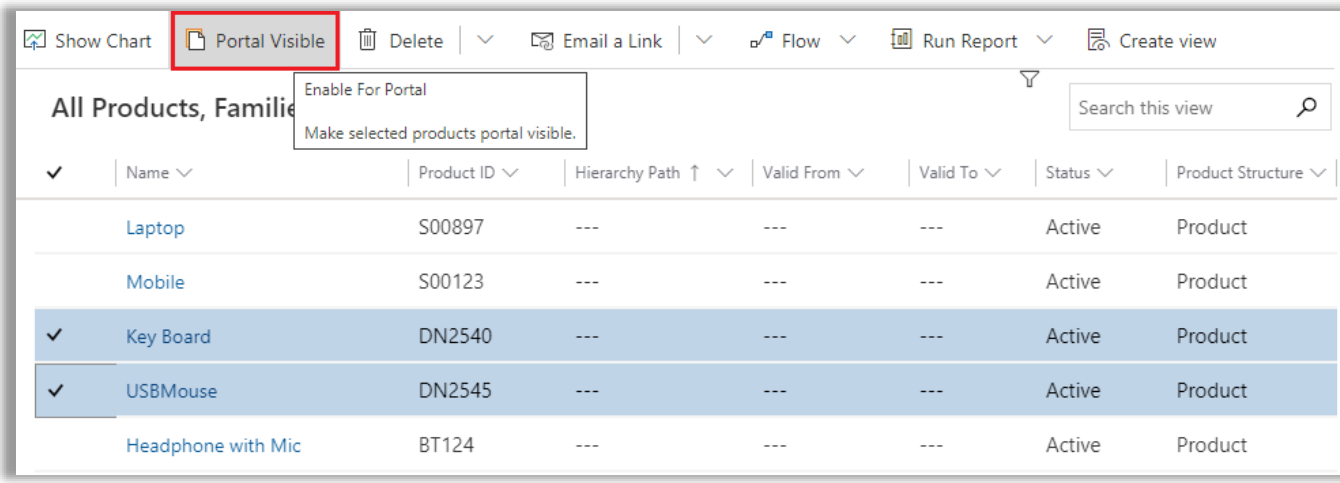


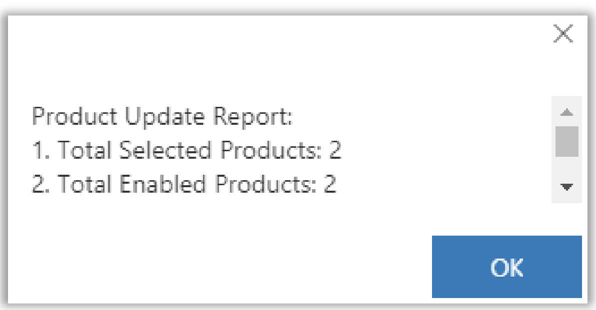
- After clicking on the Product, navigate to product's list page. Here you can see the details of the product with its status and Structure.



Portal Visible

- You can enable the product for the Portal by clicking on 'Portal Visible'. Once the Product is activated, it will visible in the Customer Portal.





- As you click on the 'Portal Visible 'option, you will get the Report how many products are enabled for customer portal.

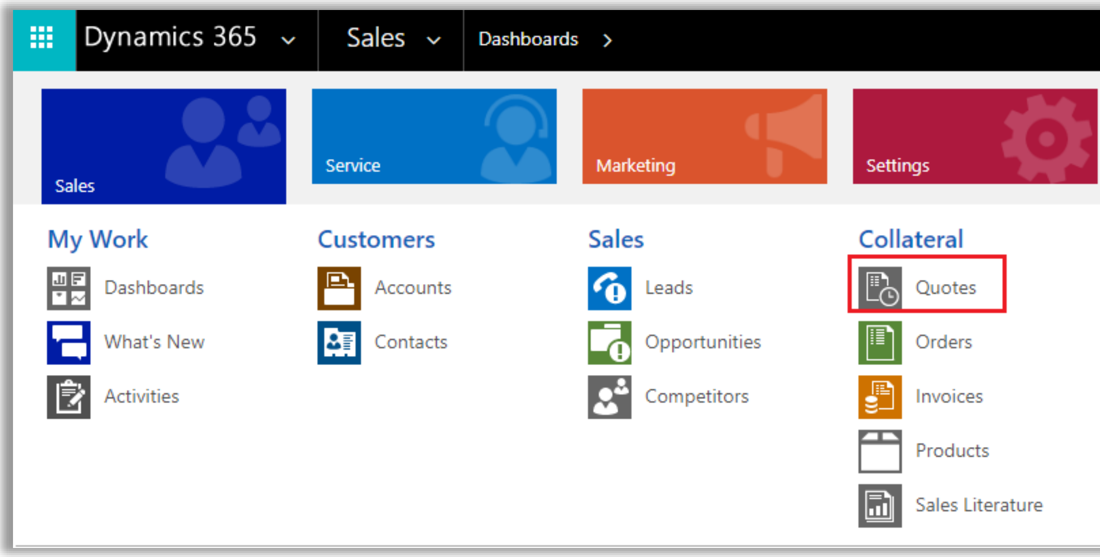
- Similarly, for the **Bundle** Product, you can enable the Portal Visible from the CRM side.

Note: Family typed products are not supported in the Portal.

Quote Module

If you are using **Classical view**:

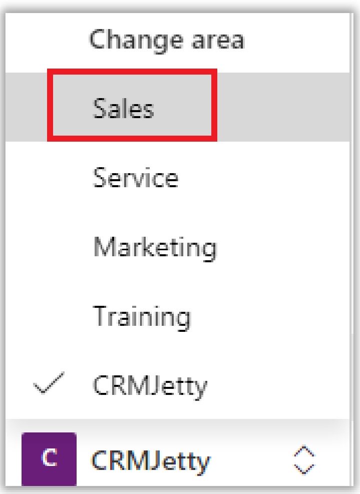
- Navigate to the **Sales** from the header menu and click on the **Quotes** module.

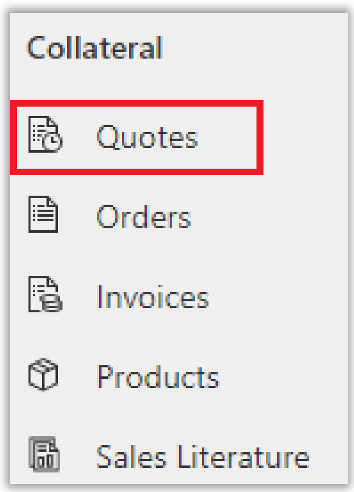


OR

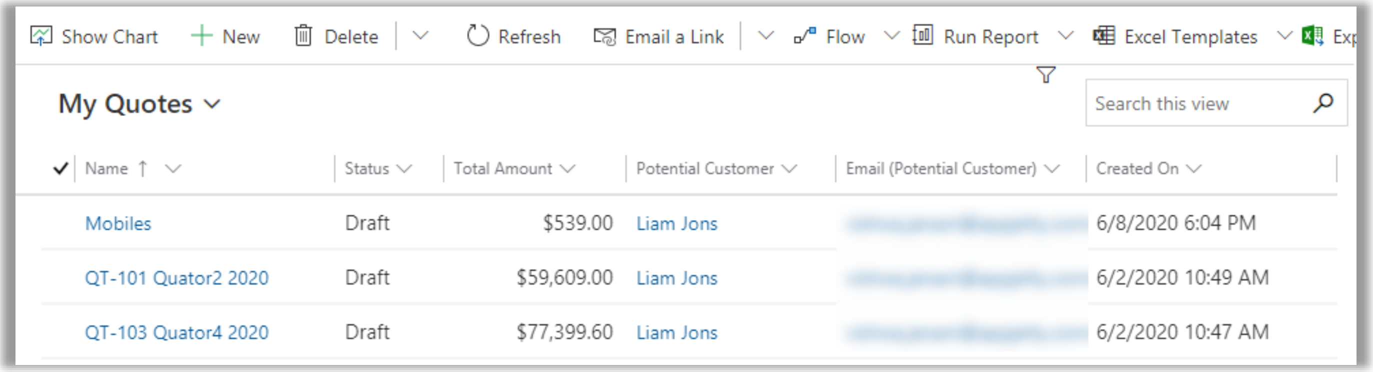
If you are using **Unified Interface**:

- Navigate to the **Sales** from the navigation pane (below-left corner) and click on the **Products** module.

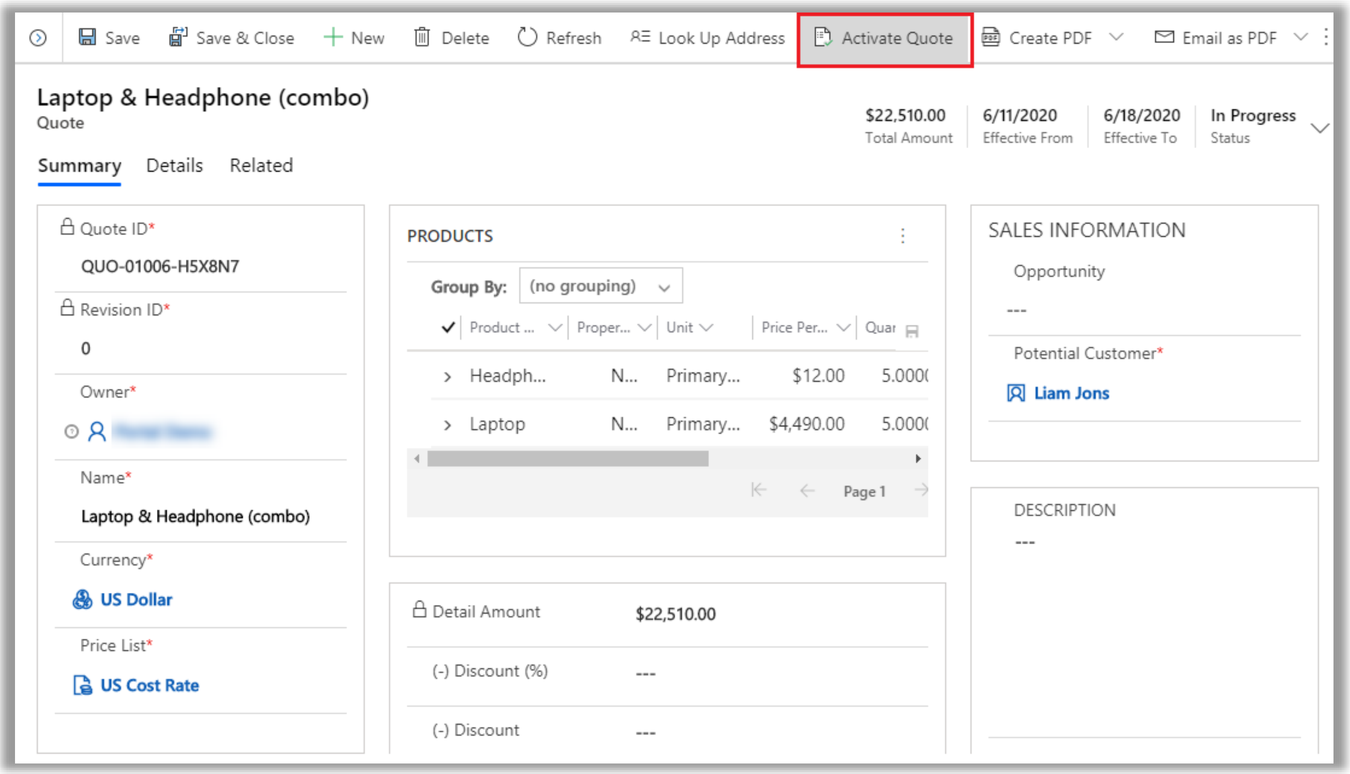




- After clicking on the **Quotes**, navigate to the page of Quotes. Here you can view the list of Quotes which are added by you and added by the users from the Customer portal.



- The Quotes are still in the "Draft" status. Once you click on the **Activate Quote** option, the Status will change to **Active** and the user will also get the status as **Active** in the Customer portal for that particular quote. The portal user will also be notified of the same.

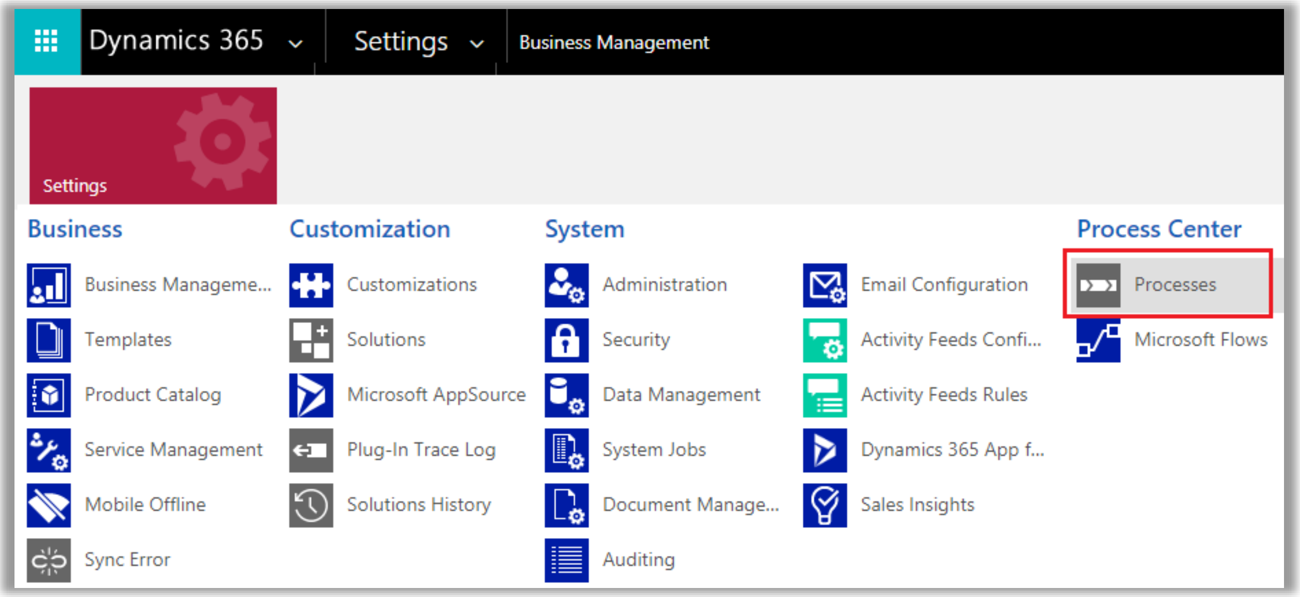


- Once the **Quote** is activated, the user cannot edit it from the Customer portal.

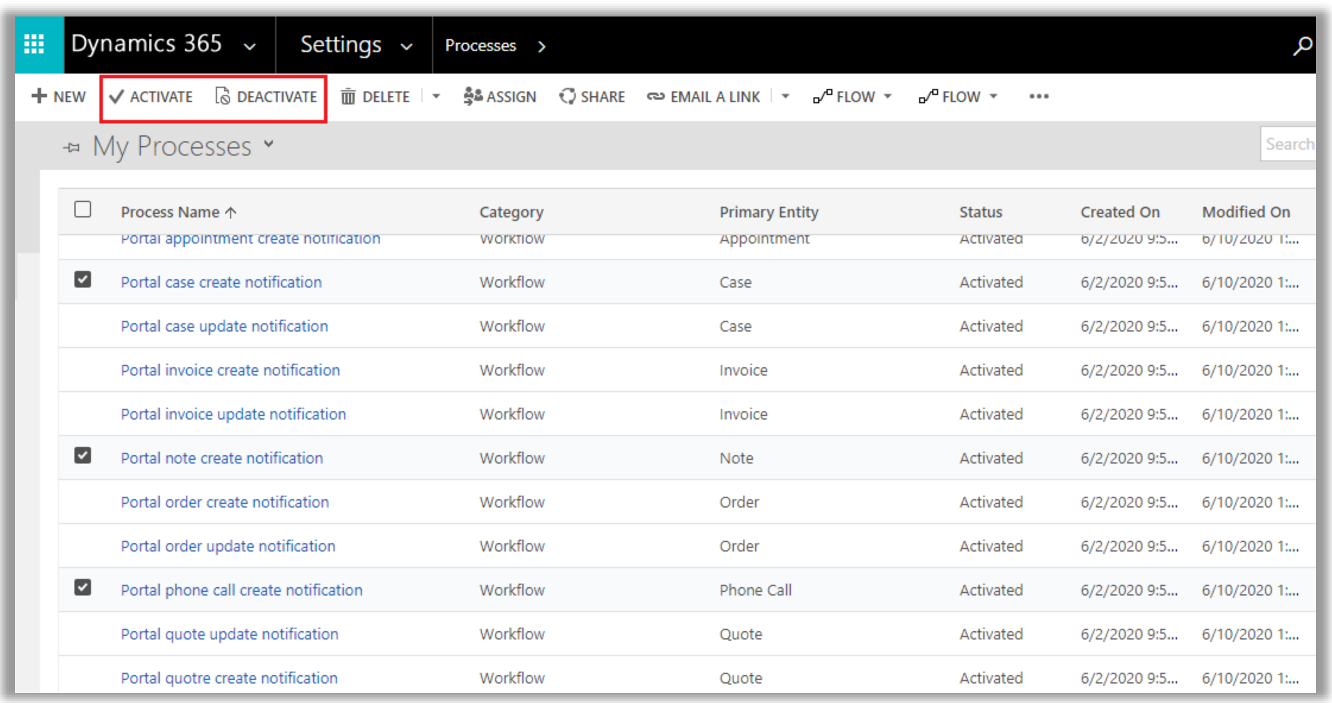
Email Notifications

Enable/Disable Email notifications:

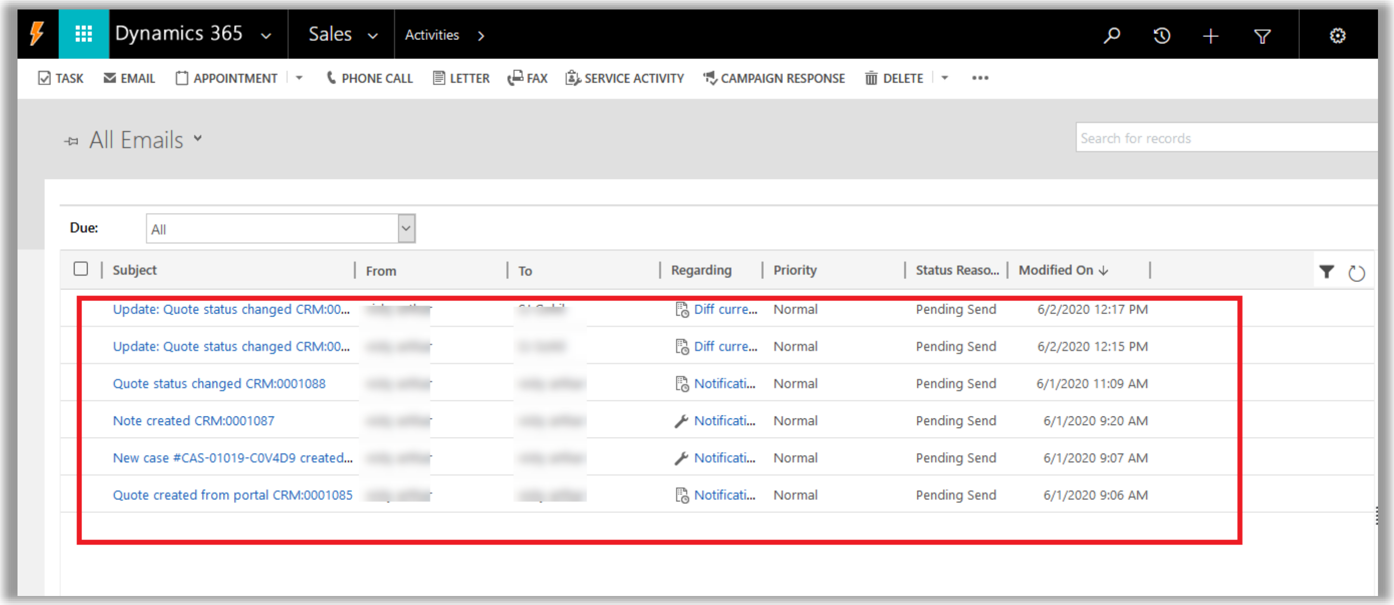
- To get the Email Notification for certain actions performed from the CRM as well as Customer Portal side, you must enable the Email Notification from the CRM. For that, navigate to **Settings → Process Center → Processes**.



- By clicking on the “Processes”, you will be navigated to My Processes page. Select the Processes for which you want to get the email notifications.



- You can enable notifications for below actions, for the Porta User:
  - New case creation
  - Case status change
  - Note creation
  - Order creation
  - Order status change
  - Quote creates
  - Quote status changed
  - Invoice creates
  - Invoice status changed
  - Phone call created
  - Appointment created

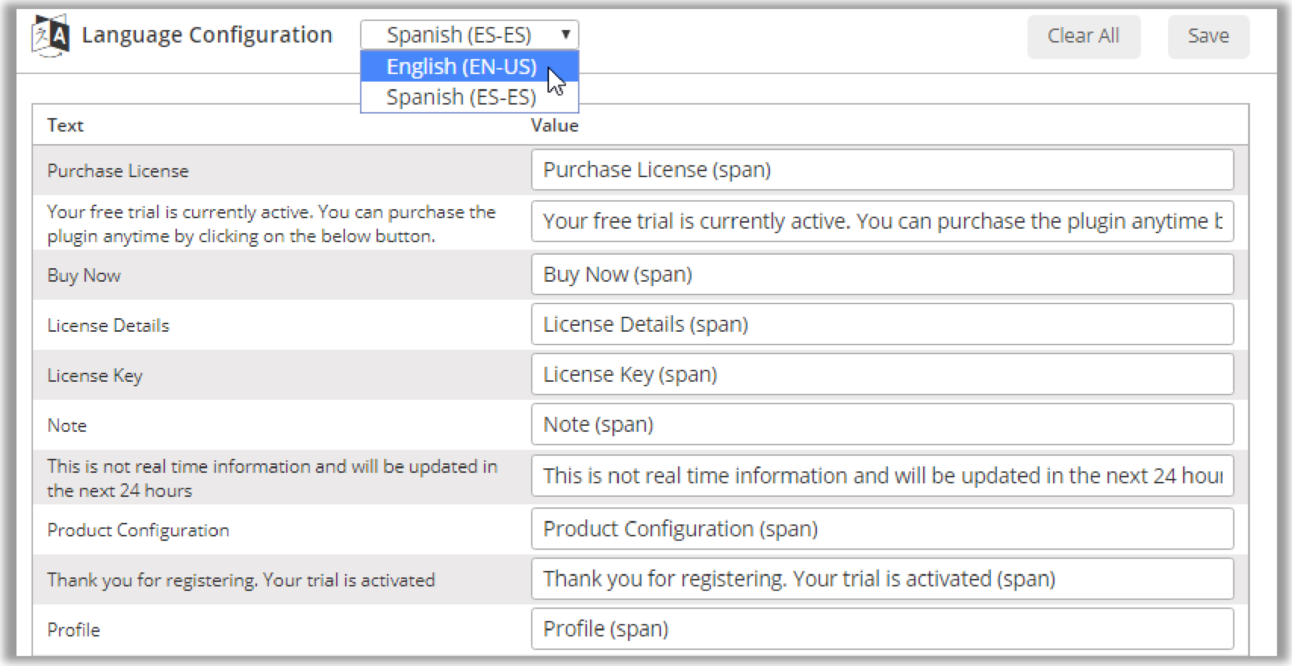


- If action is performed from CRM by you, then the email notification will be sent to the portal user. Similarly, if any action is performed by the Portal user, you will get the notification regarding that.

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.



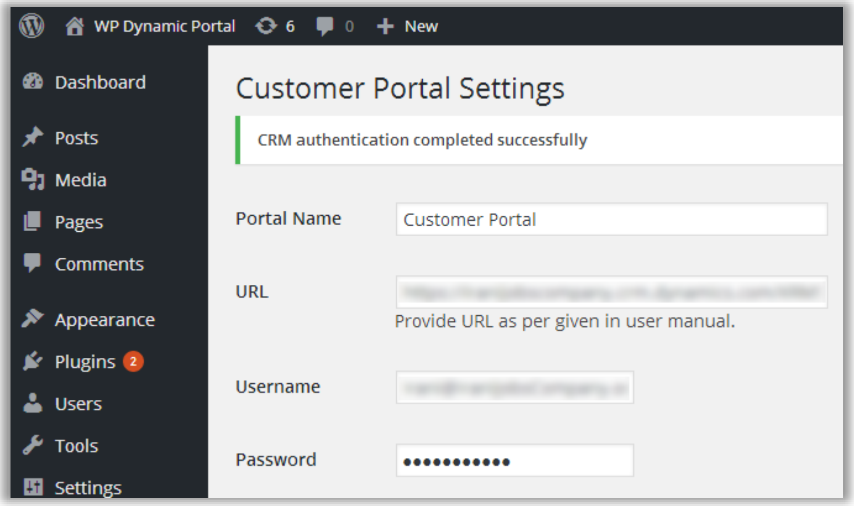
- Select language and add messages. It will be reflected on the portal when that language is changed by the portal user.

Note: Default language can be set from CRM view **CRMJetty → General Settings.**

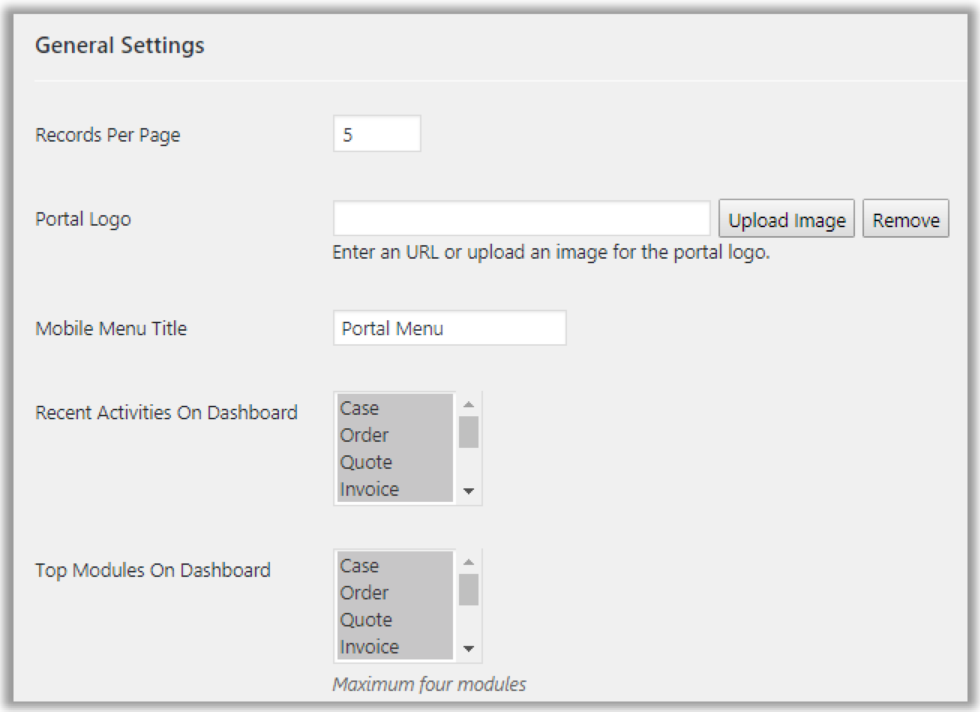
- You can add GDPR consent text from respective language page and the same will get reflected on portal side.

WordPress Configuration Settings

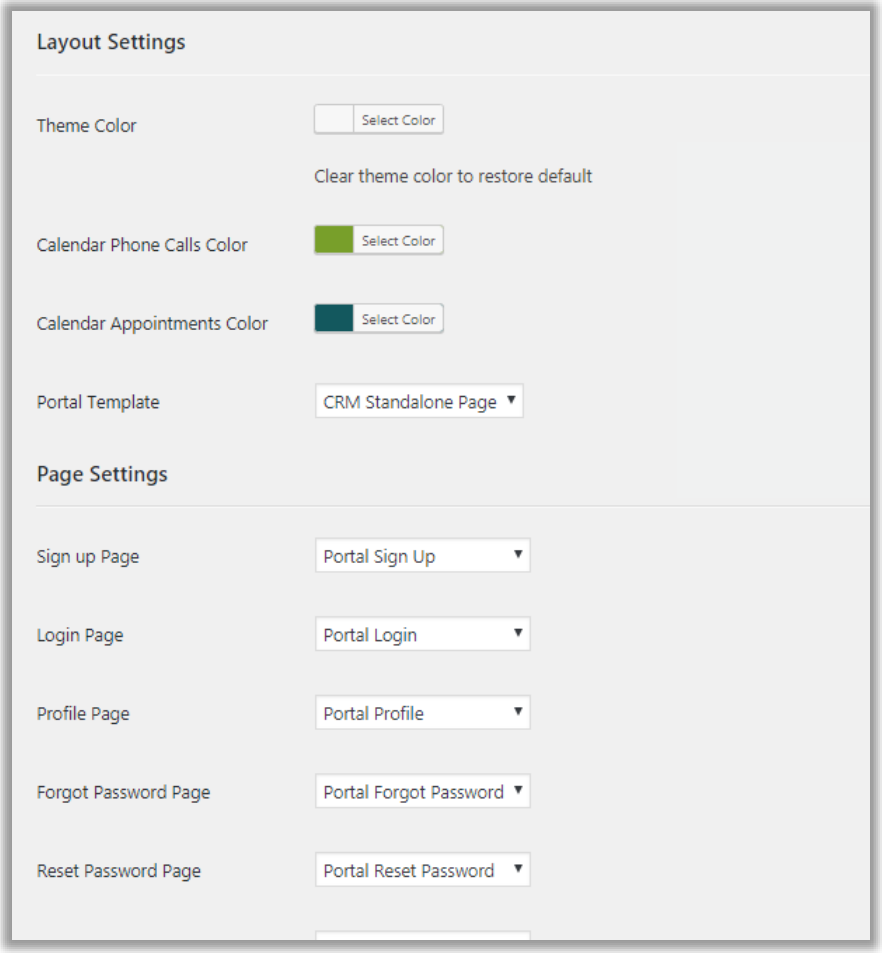
- To configure the Portal, go to WordPress admin side and click on **'Customer Portal'**.



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



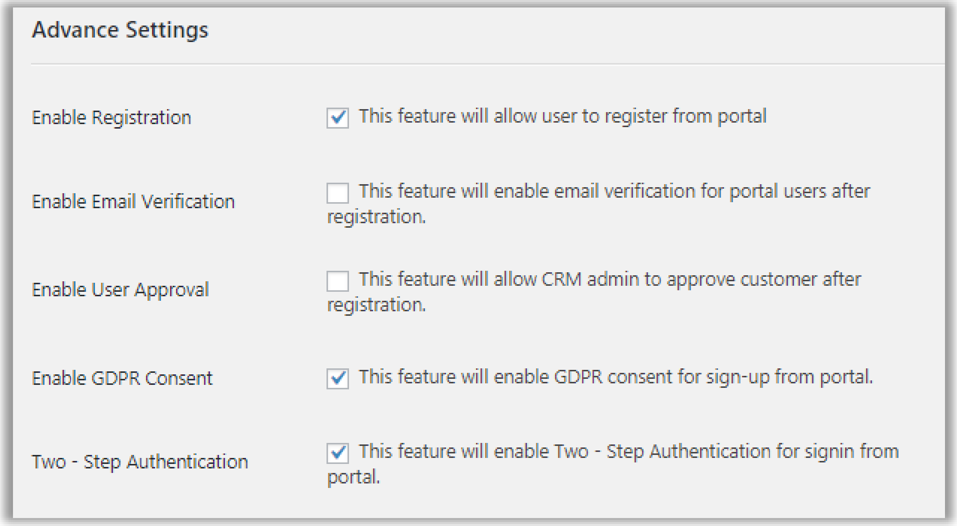
- From general settings, you can also specify the records per page you wish to display on a page or Upload a logo image for your portal. You can set recent activities for modules you wish to display on Dashboard.



- 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.



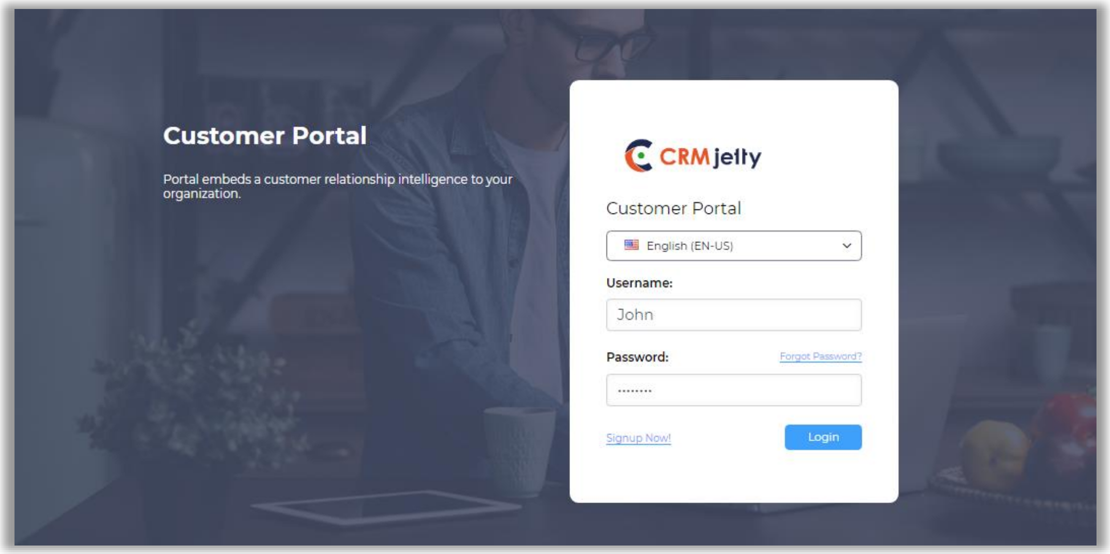
- You will get 'Advance Settings Option' from where you can get various option to enable registration, email verification, user approval, Two-Step Authentication and GDPR consent.

Customer Portal (Front Side)

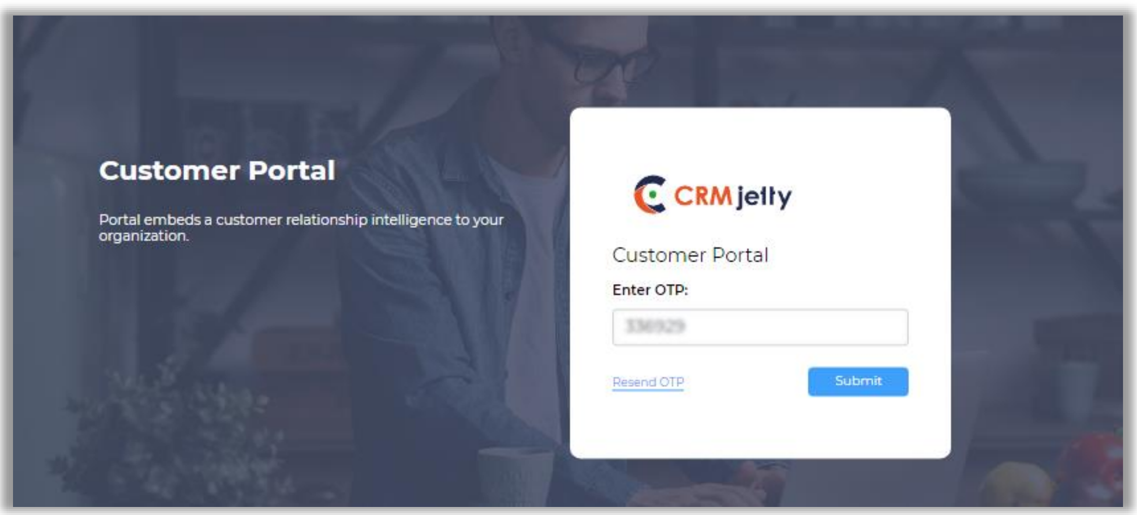
After completing all configurations at Dynamics CRM and WordPress portal for WordPress Portal plug-in, Customer can sign-up or login to WordPress Portal and access Dynamics CRM modules.

Login, Sign Up & Forgot Password

- 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.

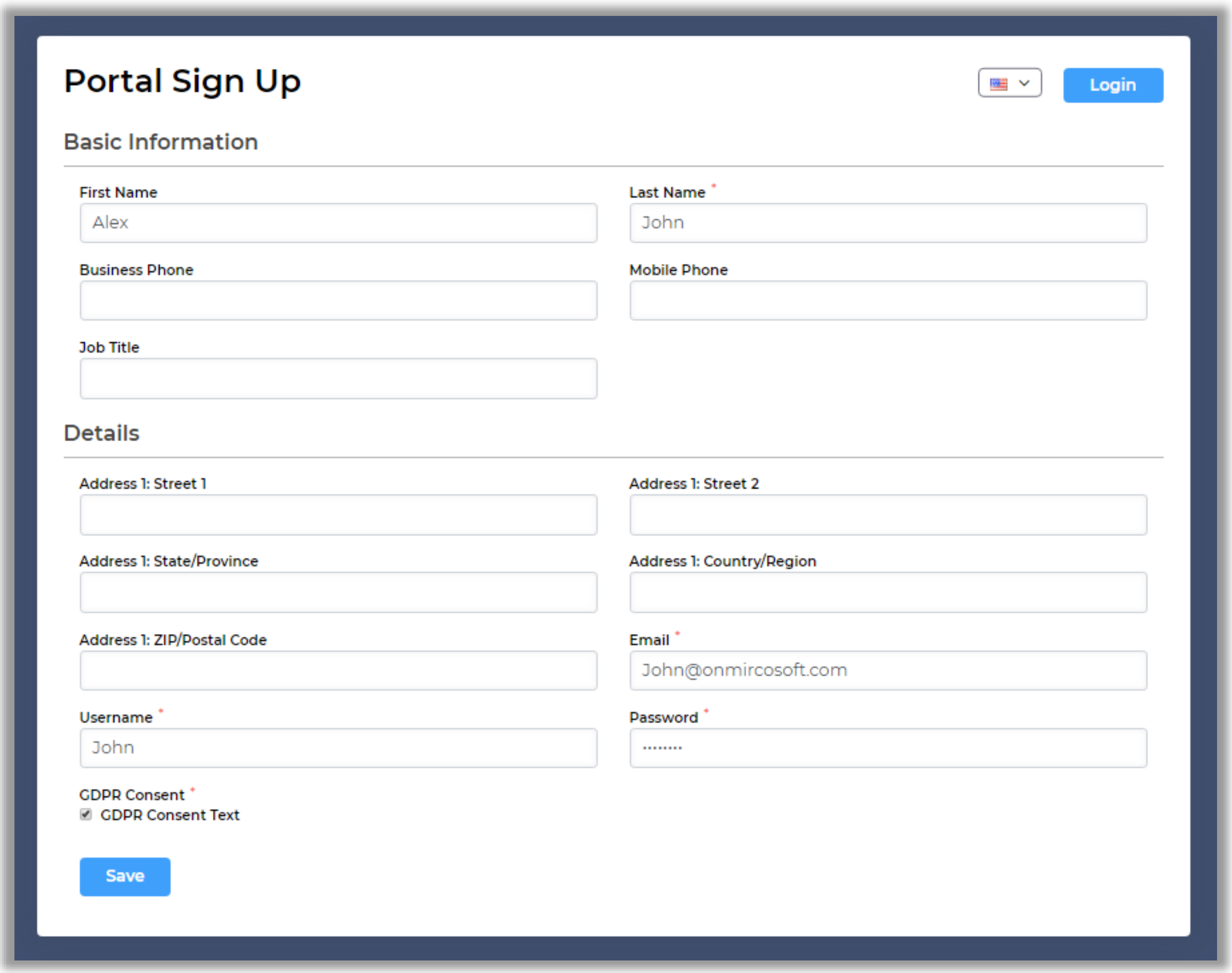
Sign Up:

- New 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.

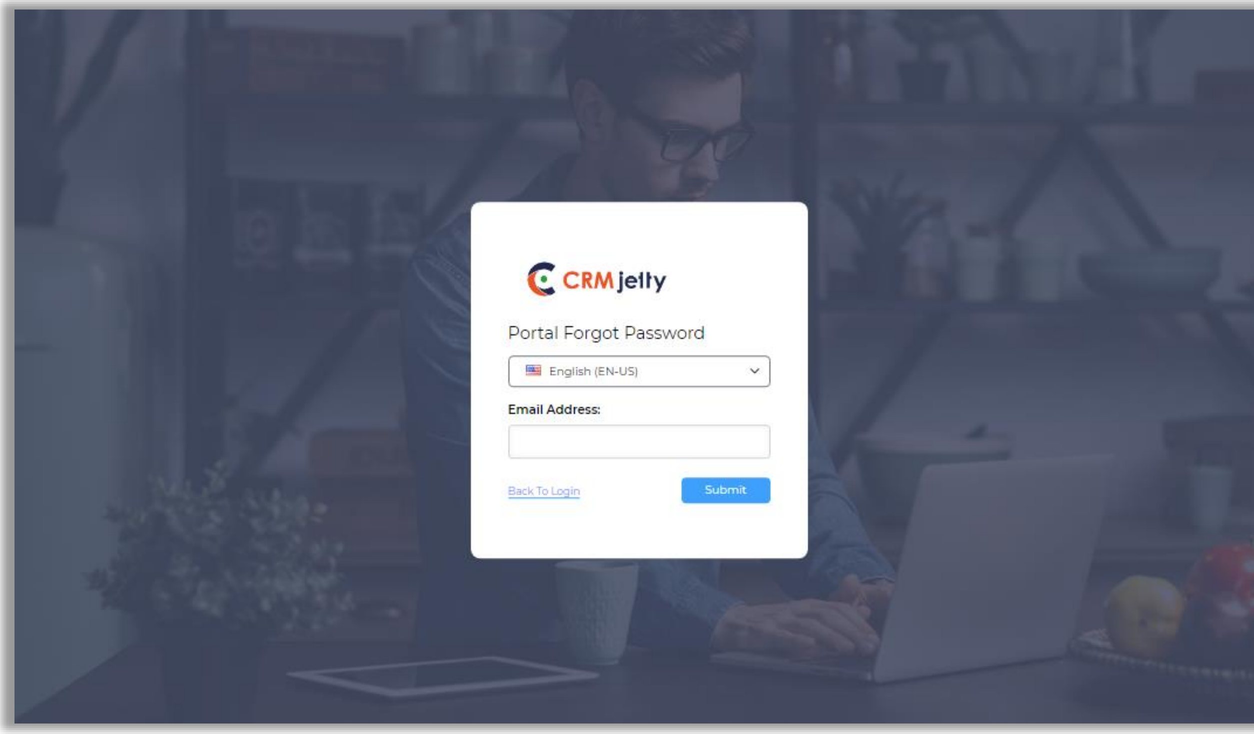
> **Note:** Already existing customers on both sides (WordPress and Dynamics CRM) won't get the access for Customer Portal automatically on installation.



- 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.

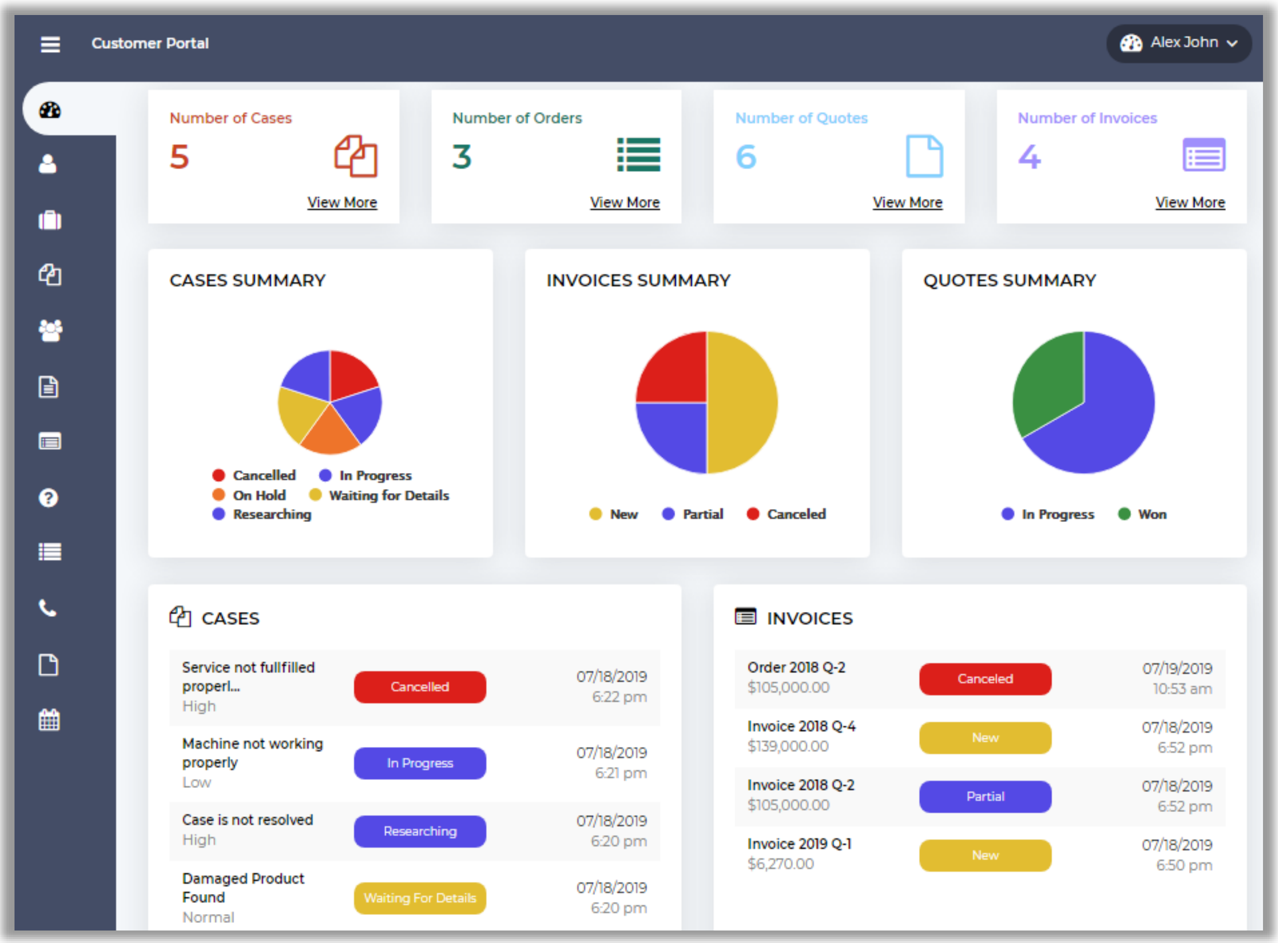
Forgot Password

- 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

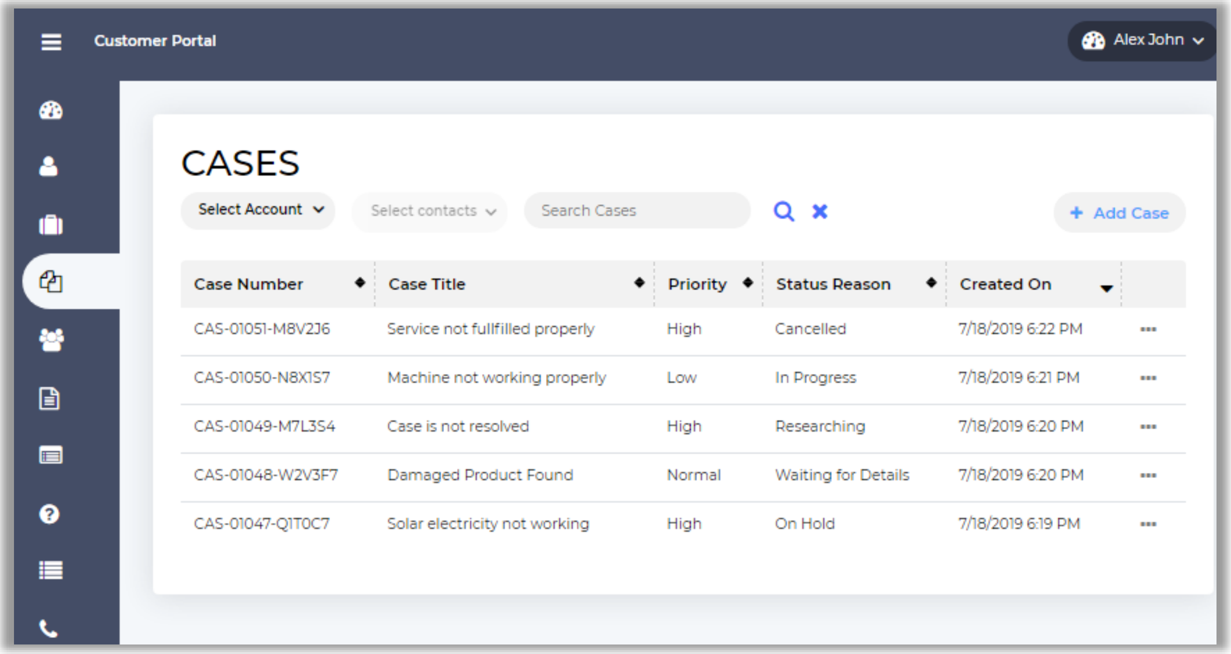
- The user can quickly access any module using the module icons. WordPress admin can set the accessibility to recently added records for portal users. Accordingly, those modules with their recent records will be displayed on the dashboard.



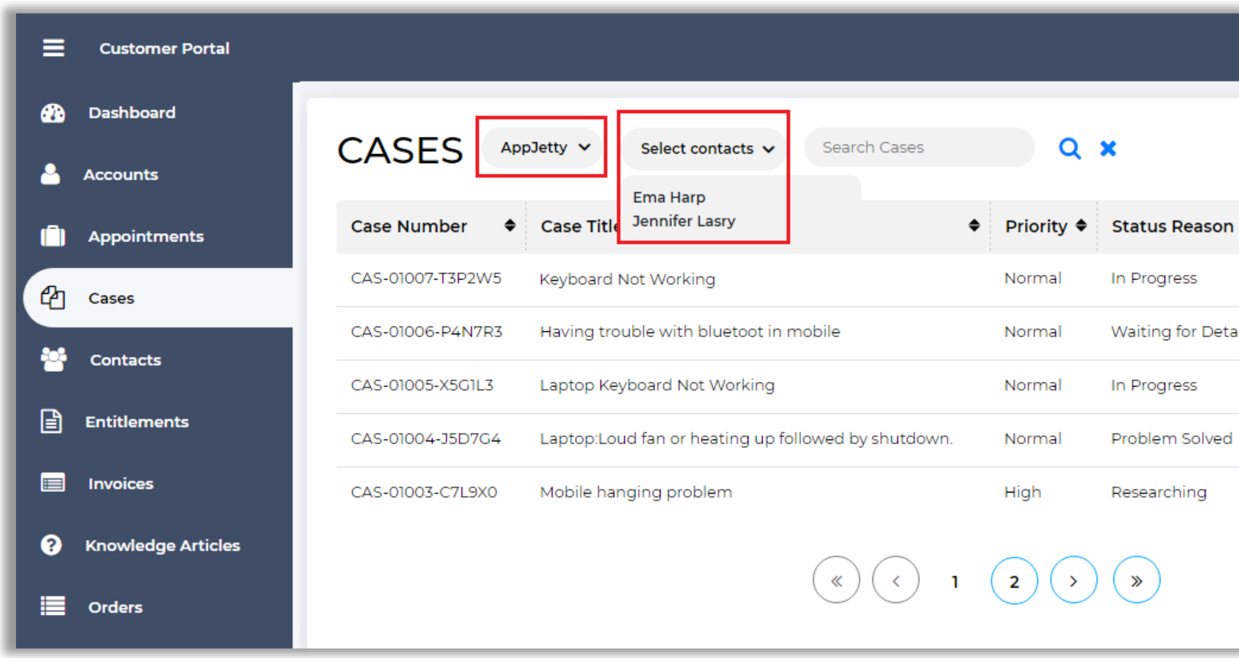
- Dashboard also includes recent activities on dashboard as well as top modules.

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.
- Here all the records will be listed as per the configuration in the Portal Layout.

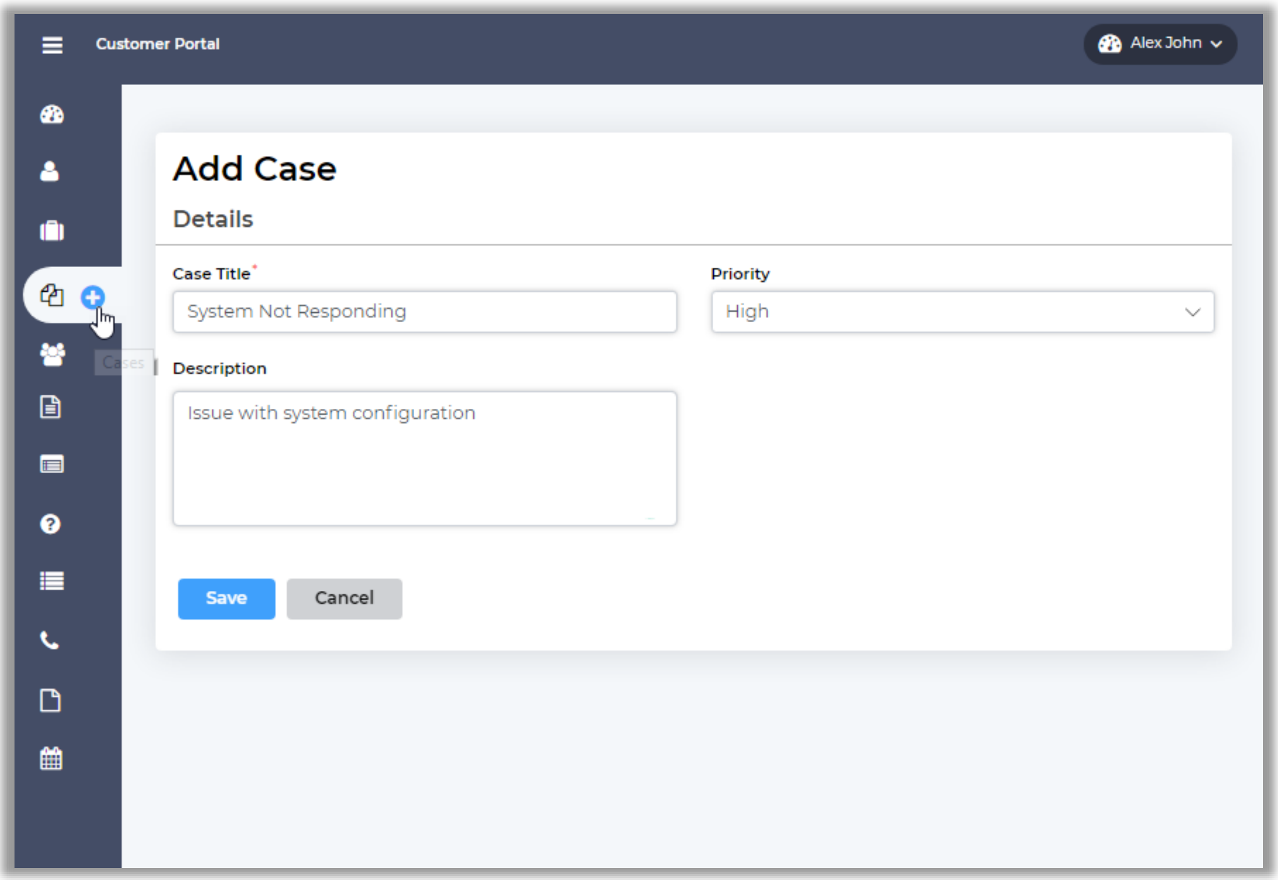


- You can also filter the existing cases based on **Account** and **Contact** selection which are configured in Dynamics CRM.



Add Case (Record)

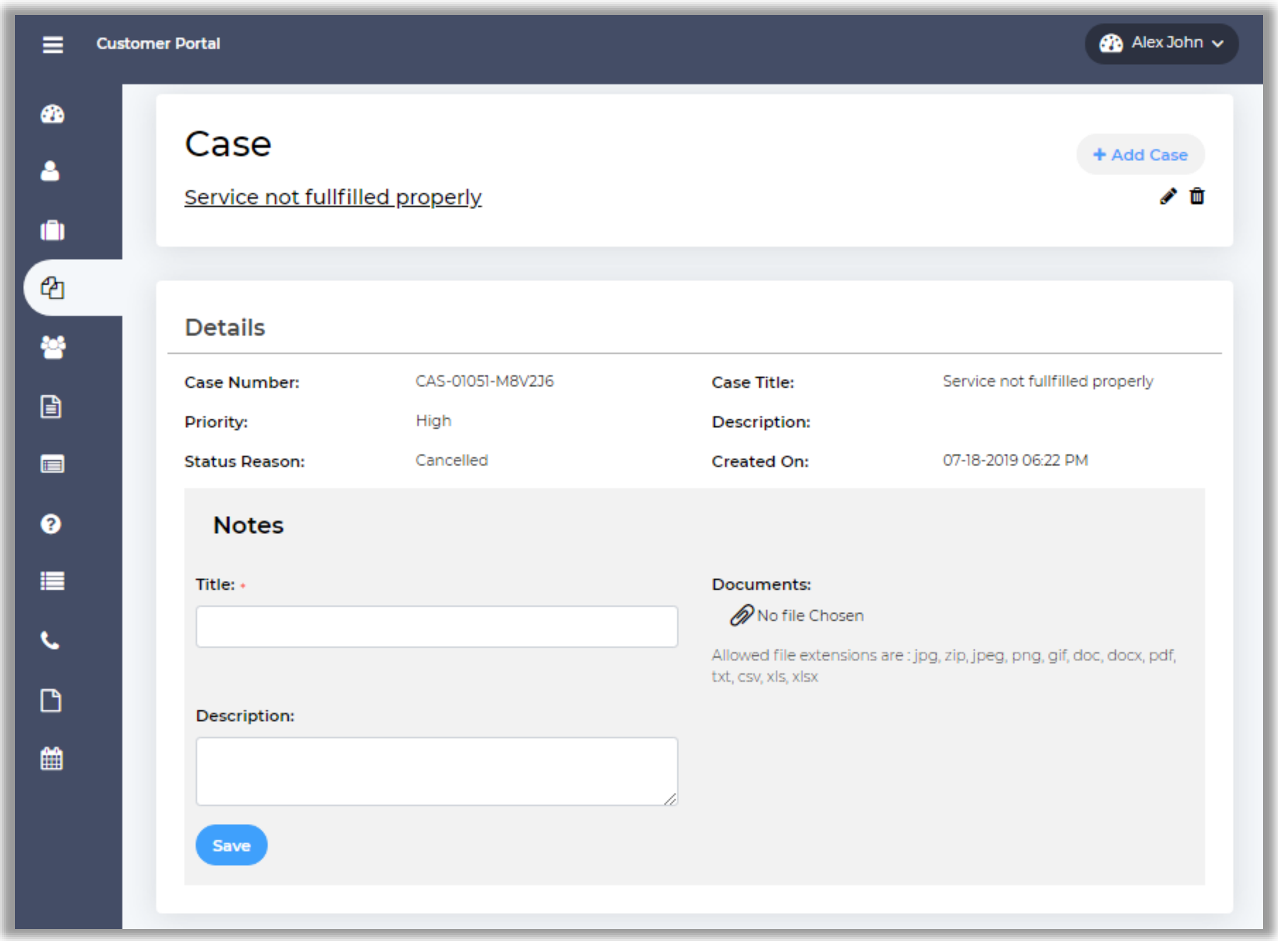
- Add a new record in a module from the portal and it will get reflected in the Dynamics CRM.
- Portal Users can also use **'Quick Add'** + button to add record in any module. As you click it the specific record's module will.



- By clicking on **+** 'Quick Add button of Case module, you will be redirected to the Add Case page.
- Here your customers can add the Case and after saving the same, it will get reflect in the Dynamics CRM.
- Admin can check the added records from the Portals.

Detail Page:

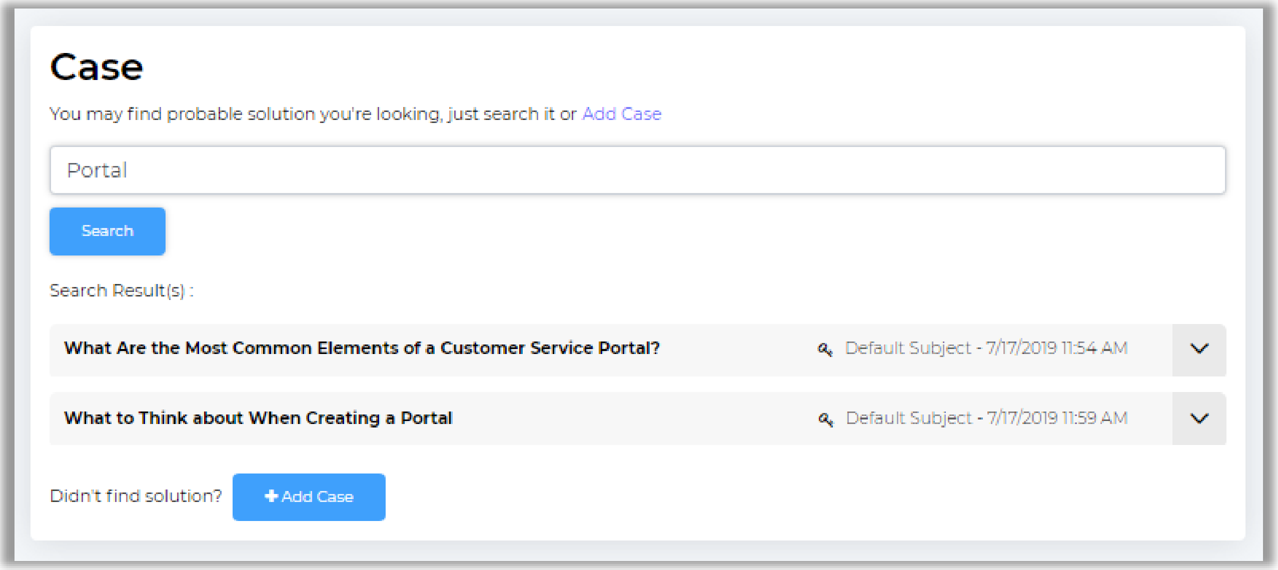
- Click on the **'View'** button from the List View and view the details of a record. You can edit that record from the detail view.
- Here the details of the record will be displayed as per the configuration in the Portal Layout.



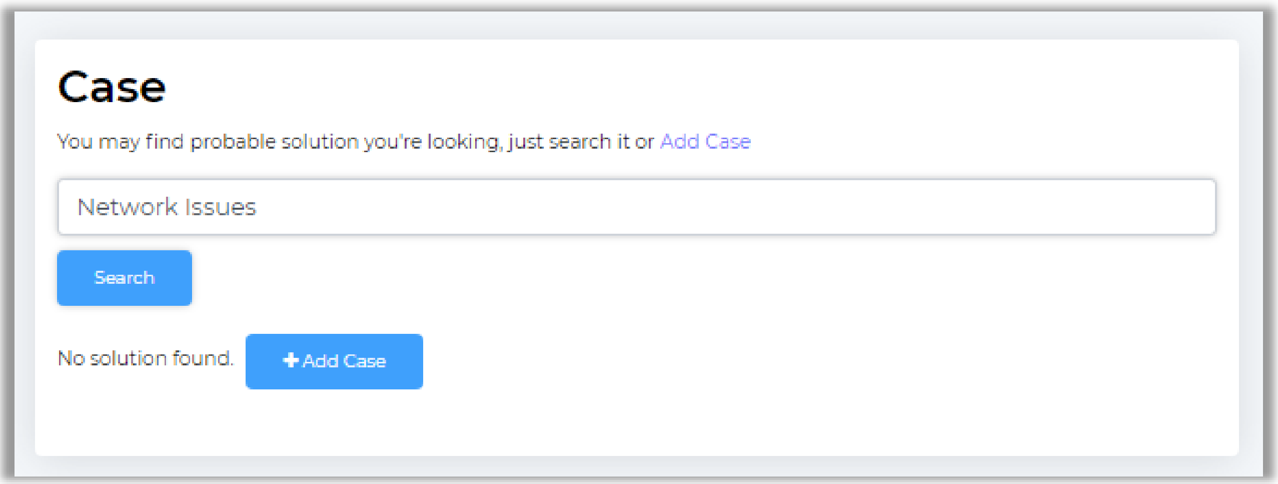
- Here your customers can add Notes along with the files and the description. As you click on Save button, the notes will be saved, and Admin can check and reply with the relevant comment & solution.

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.



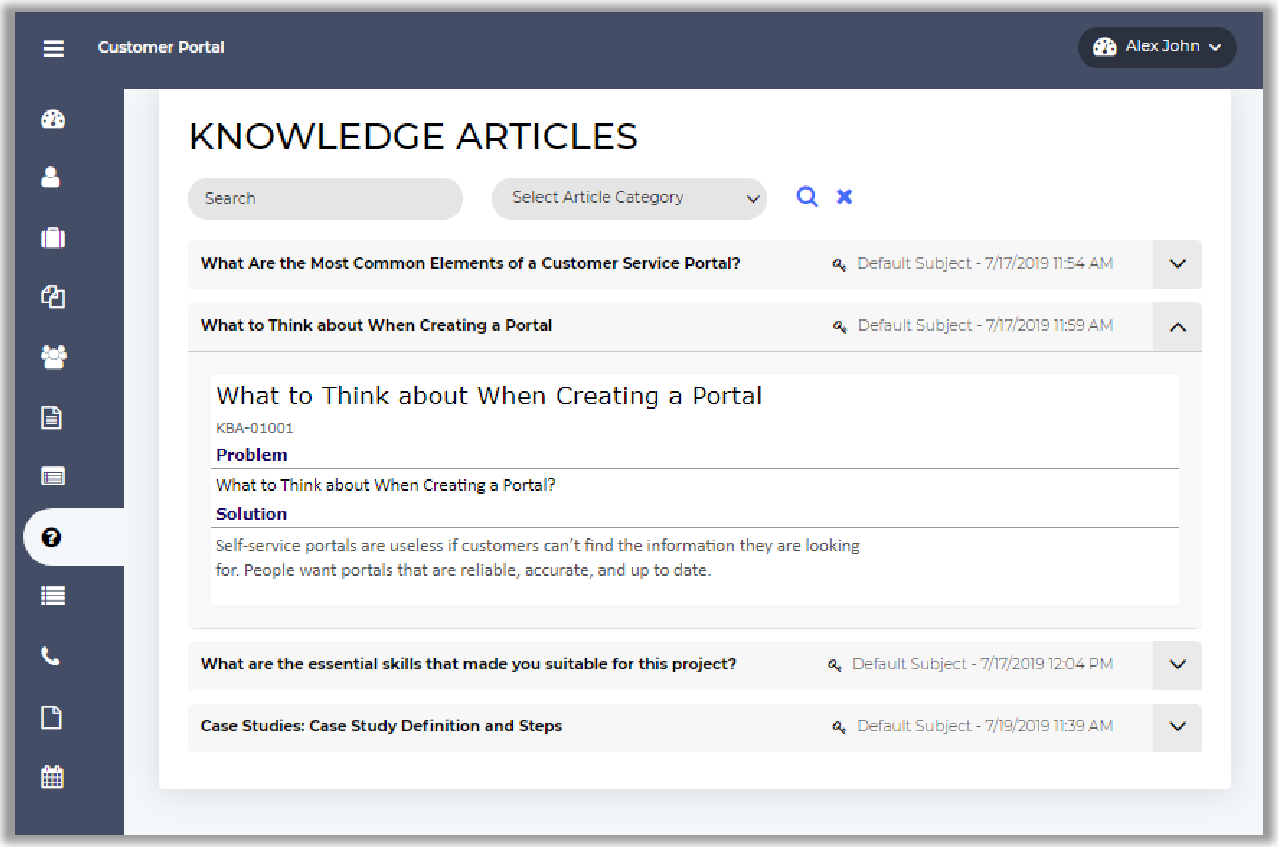
- Portal users can add queries or issues in search solution box. If there is any appropriate solution related to that case, then solution will get listed.



- 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.

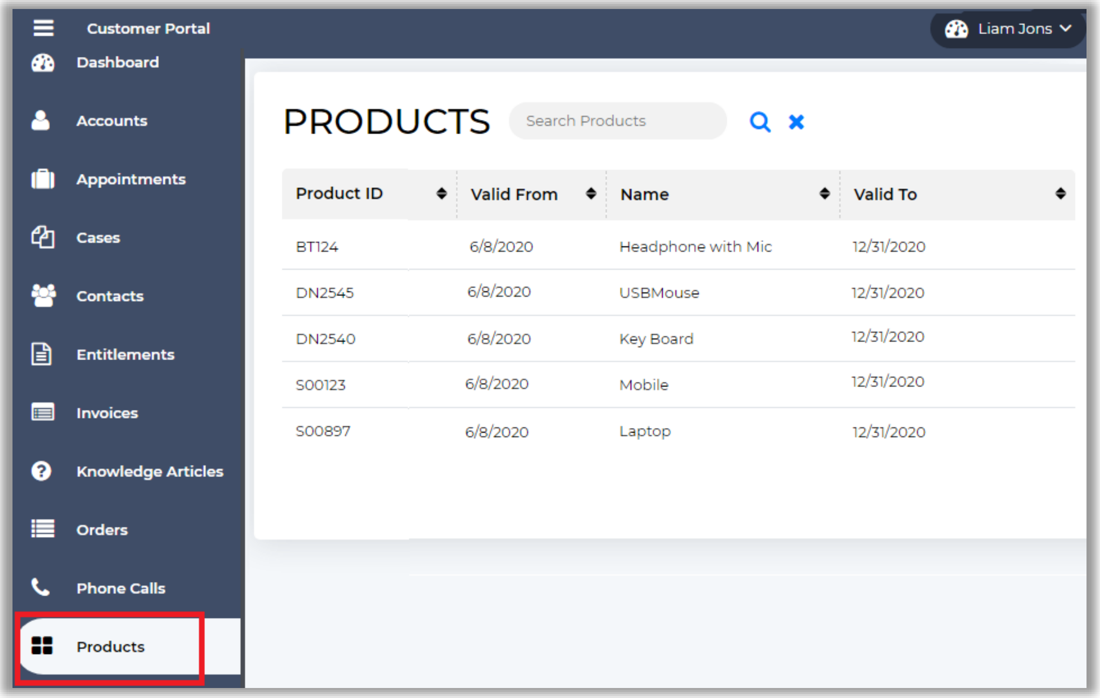
Knowledge Base

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

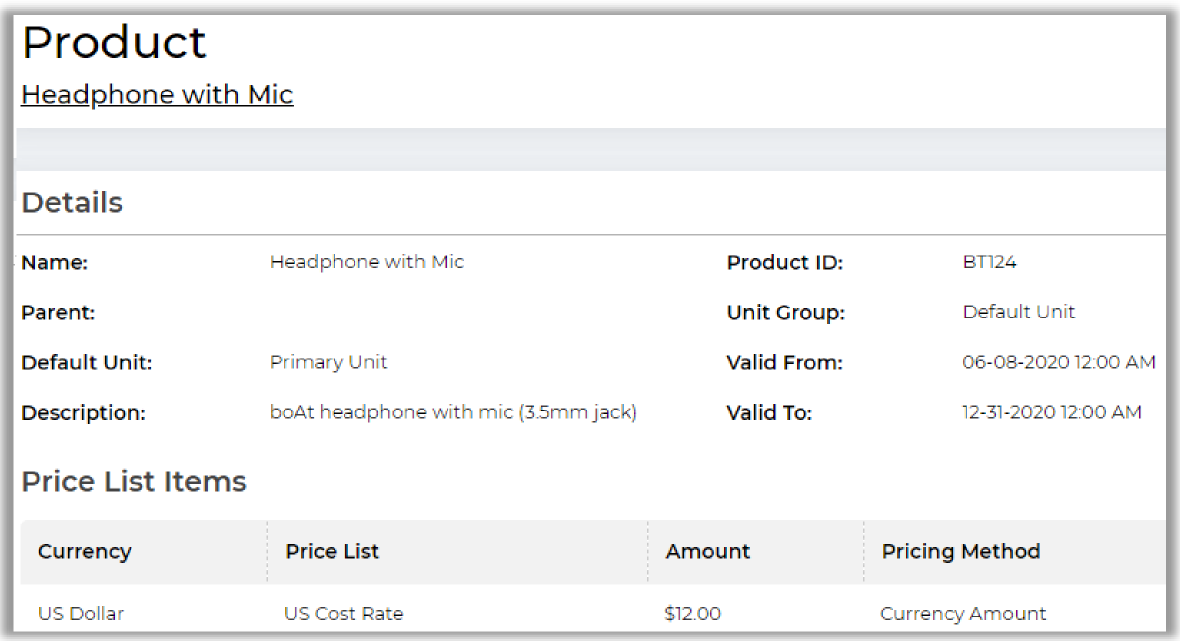


Products

- After enabling the 'Product' module, setting up the 'Portal Layouts' and enabling the product for Portal Visible form CRM side, the users will get the **list of the products** in the Customer Portal in the **Products**.



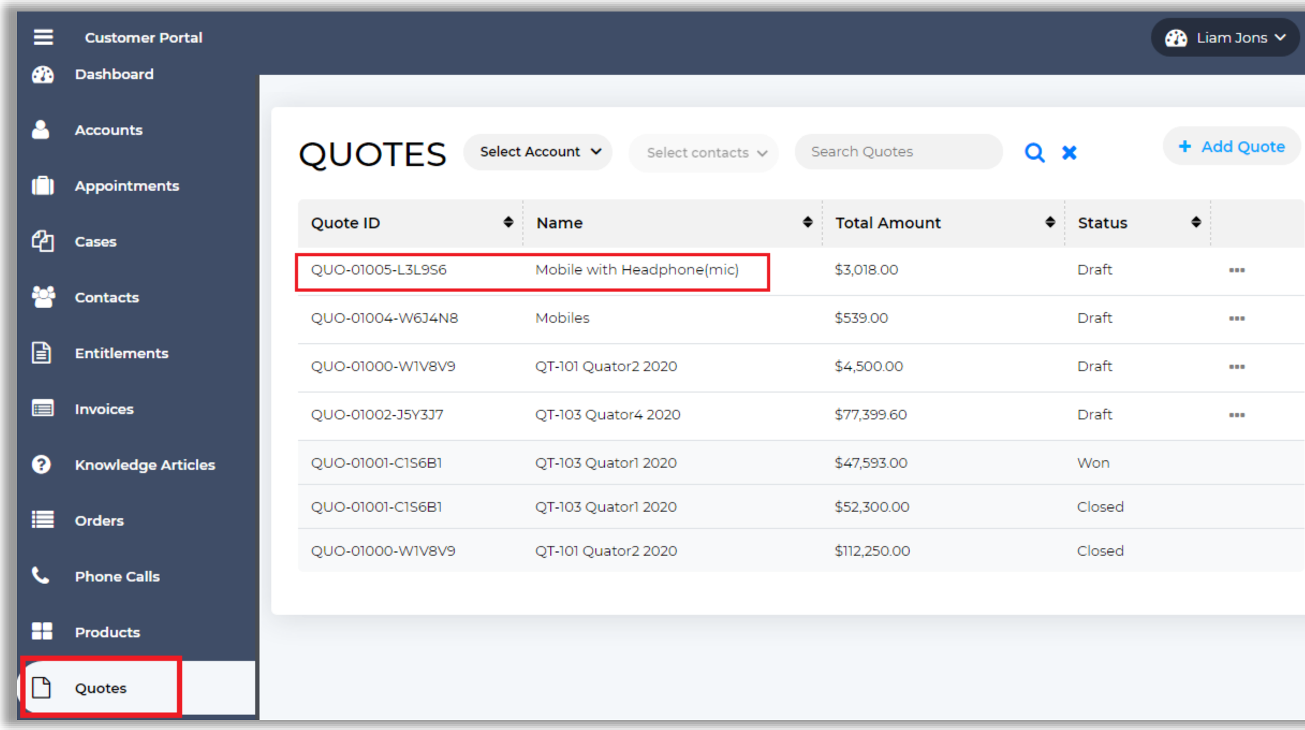
- By clicking on any product, your customers will get the details of the product which are inserted from the CRM side.



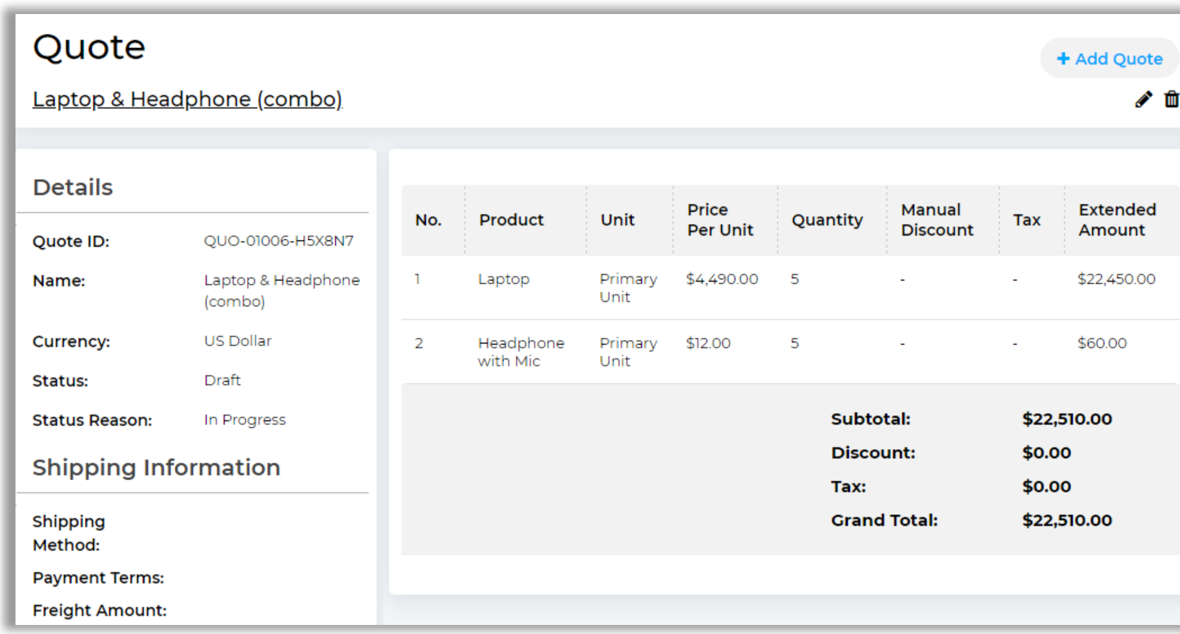
- Similarly, the users will get the bundle product in list if you have added the Bundle Products from the CRM.

Quotes

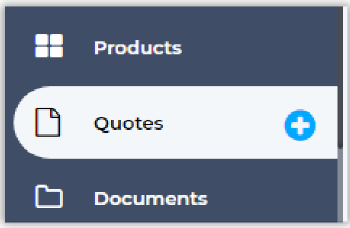
- If you have enabled the rights to add a Quote from the CRM, the user can add the Quote in the portal. User can Edit/Delete the Quotes if you have also enabled Edit/Delete rights from the CRM.
- By clicking on the Quotes menu, your customer will get the list of the Quotes with the current status and other details in the List View which are set up from the Portal Layout setting from the CRM.

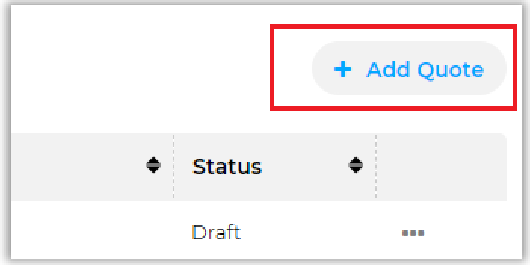


- The Quote, which is added by your customer, will be displayed as **Draft**. The user can check the details by clicking on it and edit as per the need. Details like Discount, Tax, Shipping Information, etc.



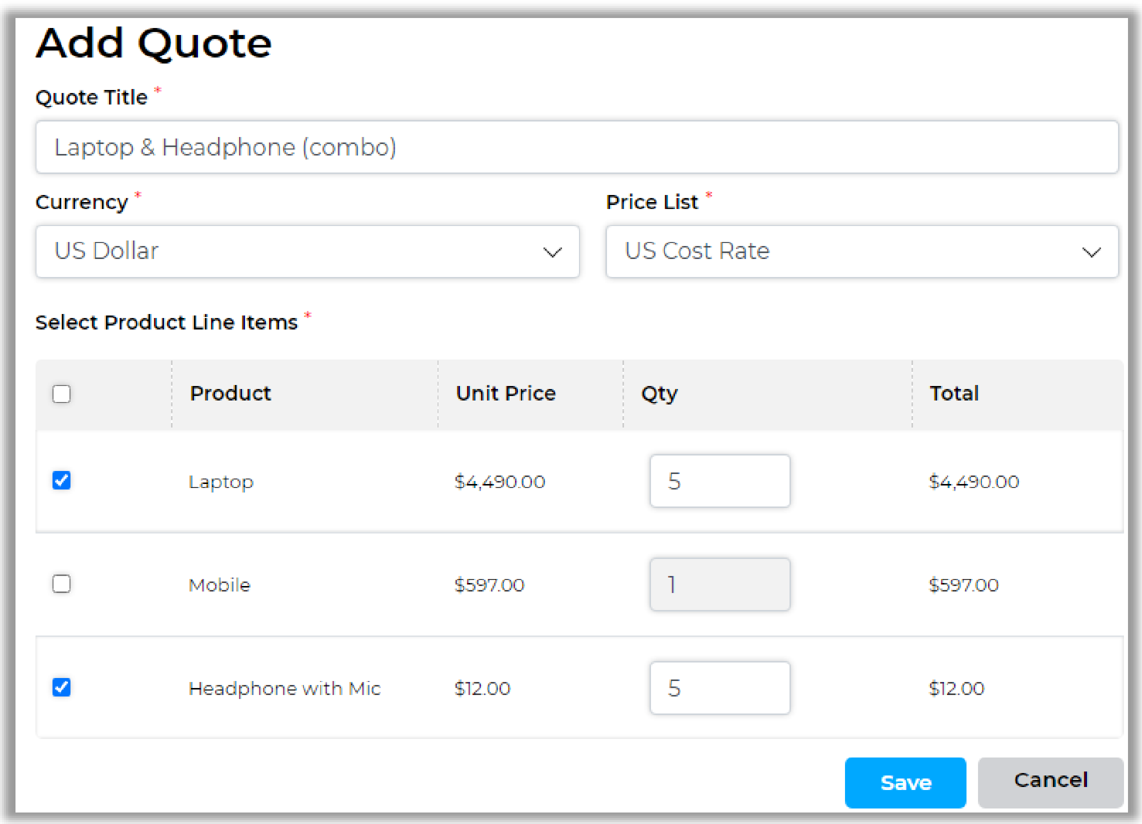
- Suppose the user wants to add a Quote. To add a Quote, they need to click on the **+ Add Quote** option form the Quote list page or direct add a Quote shortcut icon **+** is provided on besides Quote option in the menu.





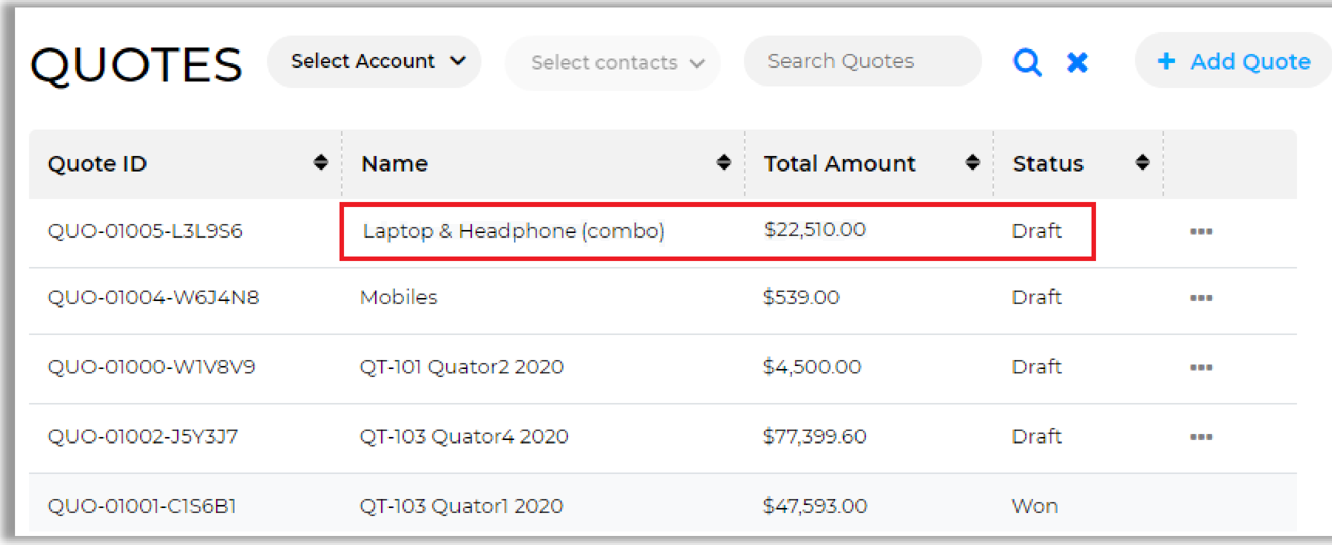
Add Quote:

- **Quote Title**: Add a relevant Quote Title which relates to your order.
- **Currency**: Select the Currency. The drop-down list of the currencies will appear as per the configuration from the CRM.
- **Price List**: Select Price List. As you have selected the Price List under the product details from the CRM, the user will get the drop-down of the Price List.
- **Select Product**: Based on the Price List, the list of the Products will appear. The Product selection sub grid available only when you have enabled the Product from the CRM User's Role matrix.



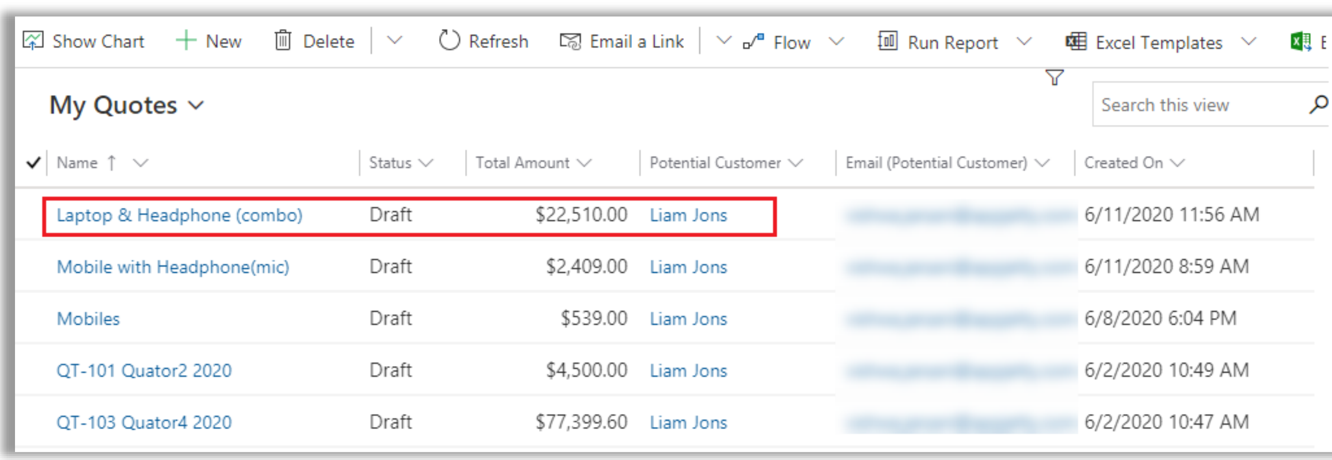
- Now, the user can select the products and then add the required Qty. After selecting the Products & inserting the Qty, click on **Save** button to add a Quote.

- Once the Quote is saved, it will appear in the list of the Quotes in the **Portal** and in the **CRM** with the **Draft** status.



Quote ID	Name	Total Amount	Status
QUO-01005-L3L9S6	Laptop & Headphone (combo)	$22,510.00	Draft
QUO-01004-W6J4N8	Mobiles	$539.00	Draft
QUO-01000-W1V8V9	QT-101 Quator2 2020	$4,500.00	Draft
QUO-01002-J5Y3J7	QT-103 Quator4 2020	$77,399.60	Draft
QUO-01001-C1S6B1	QT-103 Quator1 2020	$47,593.00	Won

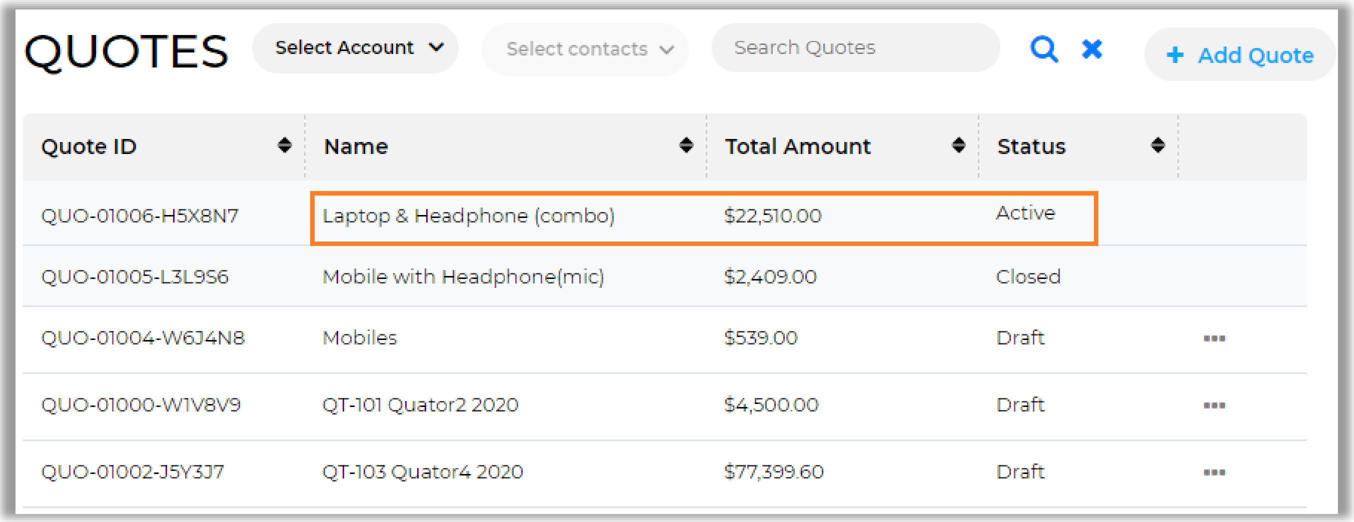
- Once the Quote is added from the Customer Portal by the user, you can check in the **Quotes** module in the CRM.



Name	Status	Total Amount	Potential Customer	Email (Potential Customer)	Created On
Laptop & Headphone (combo)	Draft	$22,510.00	Liam Jons		6/11/2020 11:56 AM
Mobile with Headphone(mic)	Draft	$2,409.00	Liam Jons		6/11/2020 8:59 AM
Mobiles	Draft	$539.00	Liam Jons		6/8/2020 6:04 PM
QT-101 Quator2 2020	Draft	$4,500.00	Liam Jons		6/2/2020 10:49 AM
QT-103 Quator4 2020	Draft	$77,399.60	Liam Jons		6/2/2020 10:47 AM

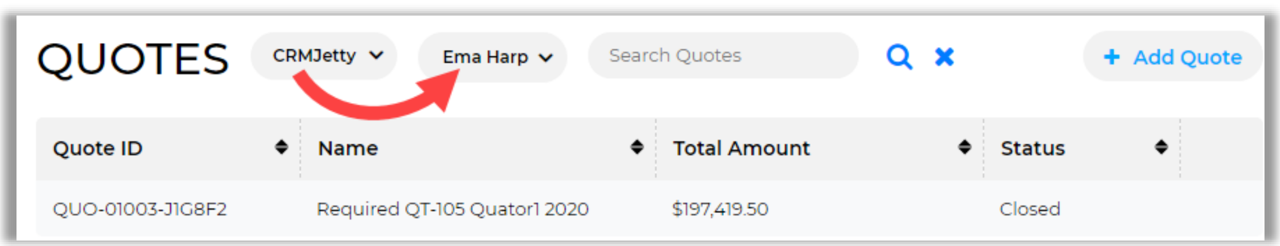
- By clicking on it, you can check the users quote details like Products, their Quantity, and other related details like Amount and provide the discount etc. and change the **Quote status** as per your requirement.

- Once you **activate** the **Quote** from the CRM, the User will not be able to edit the Quote.



User wise Quotes list

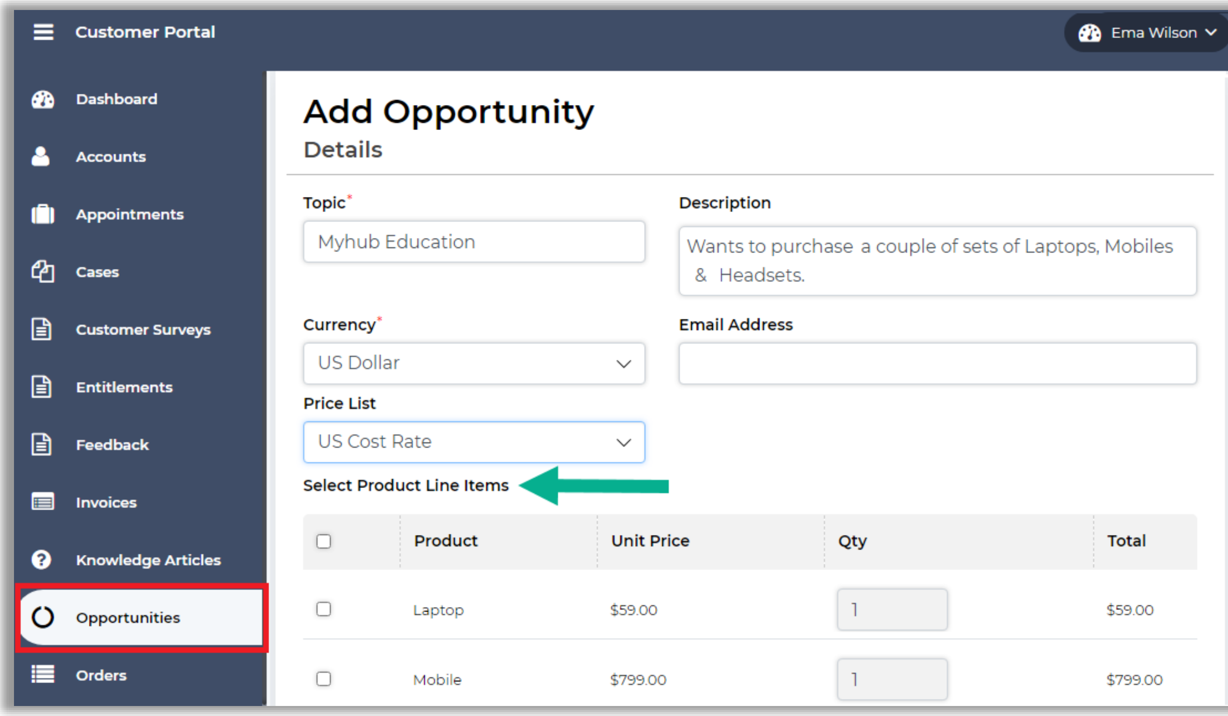
- After clicking on the **Select Account** drop-down, select Account.
- Based on the selection of account, the Contact list will appear. By selecting the Contact, you will get the Quotes list from that specific user (user).

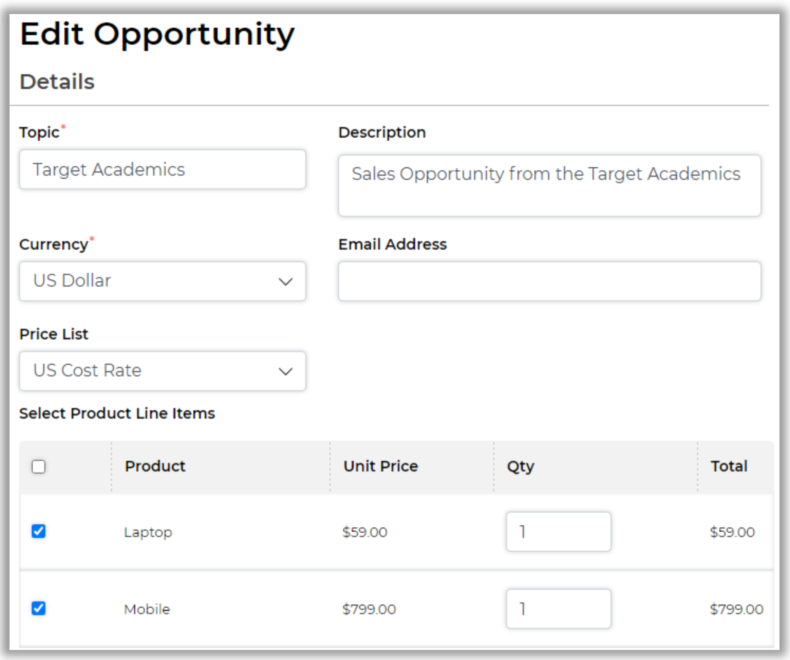


> **Note:** Product selection is compulsory for the Quotes and Orders entities when add/edit both the entities.

Opportunity

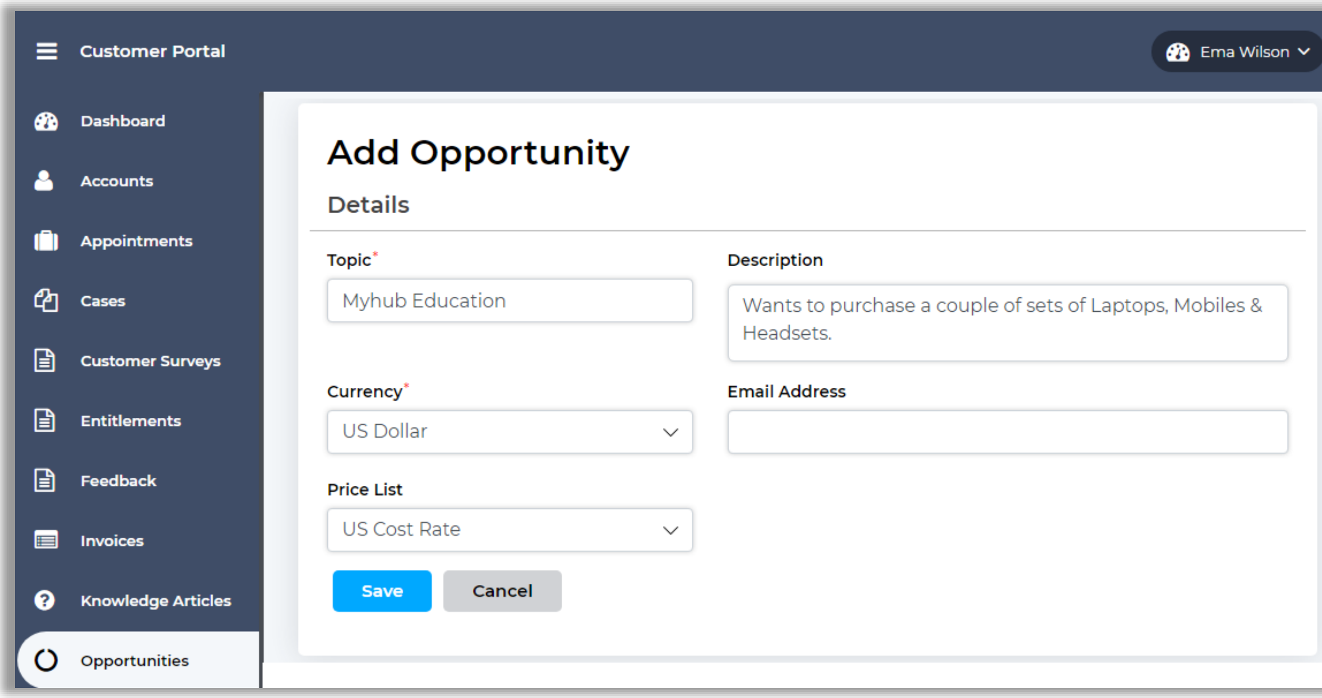
- If any entity (i.e. Order, Opportunity) is enabled from the User's Role matrix and the 'Product' selection is also enabled, then the user will get the product selection sub gird under the entity in the Portal.
- The product list will be fetched based on the selection of price list and currency.





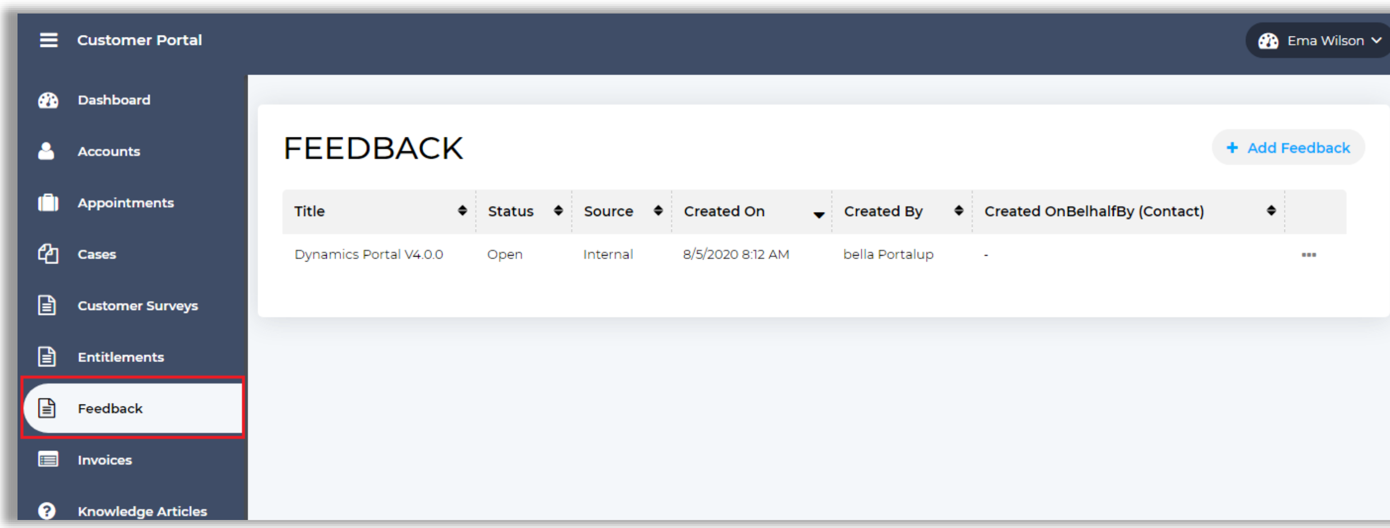
- Similarly, if you have provided the edit rights in the Roles from CRM, the user can edit the opportunity & also edit the Product Qty.

- If you have **not enabled** the product selection option from the CRM, the user will not get the product listing.



Custom Entity

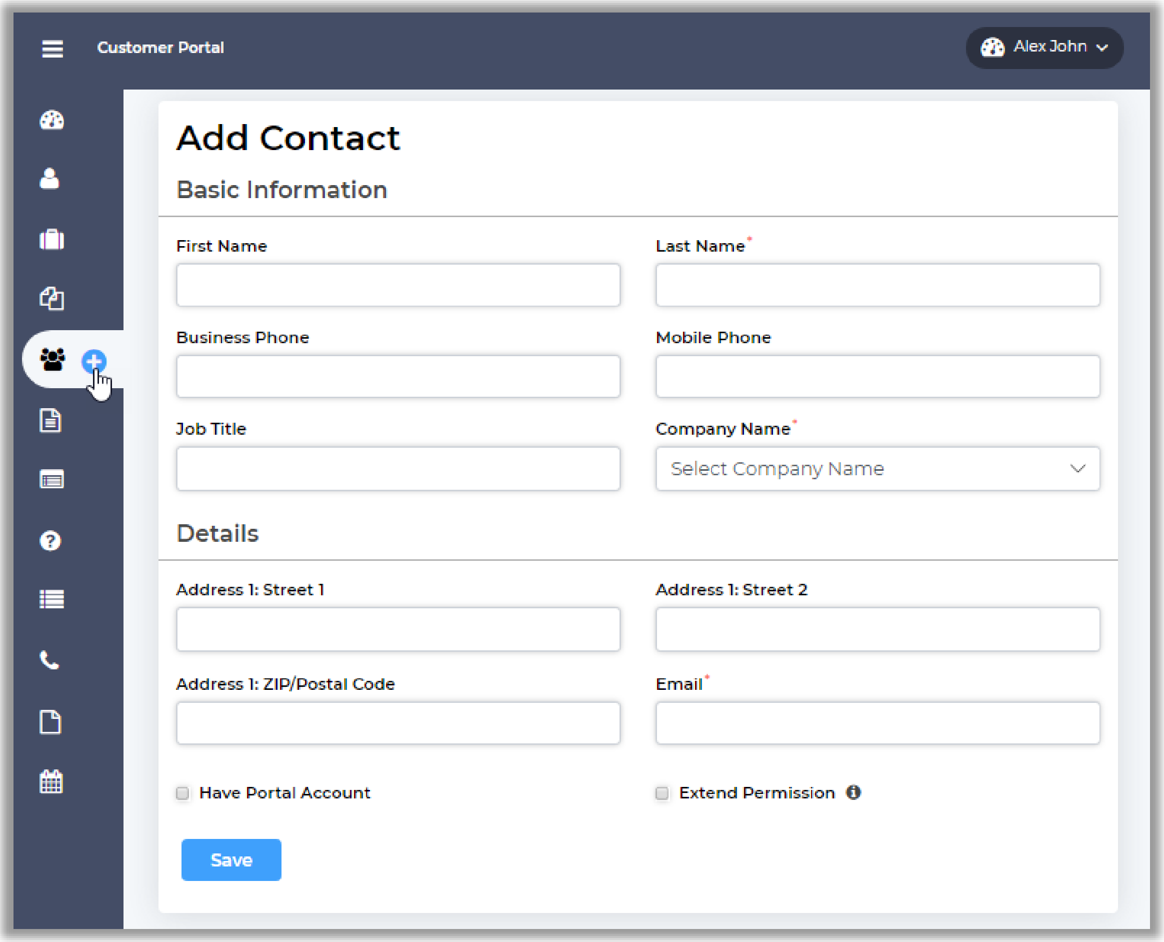
- If you have added any custom entity in CRM with accessible rights and settings Portal Layouts for that Entity, the user will get that entity (module) in the customer portal.



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.

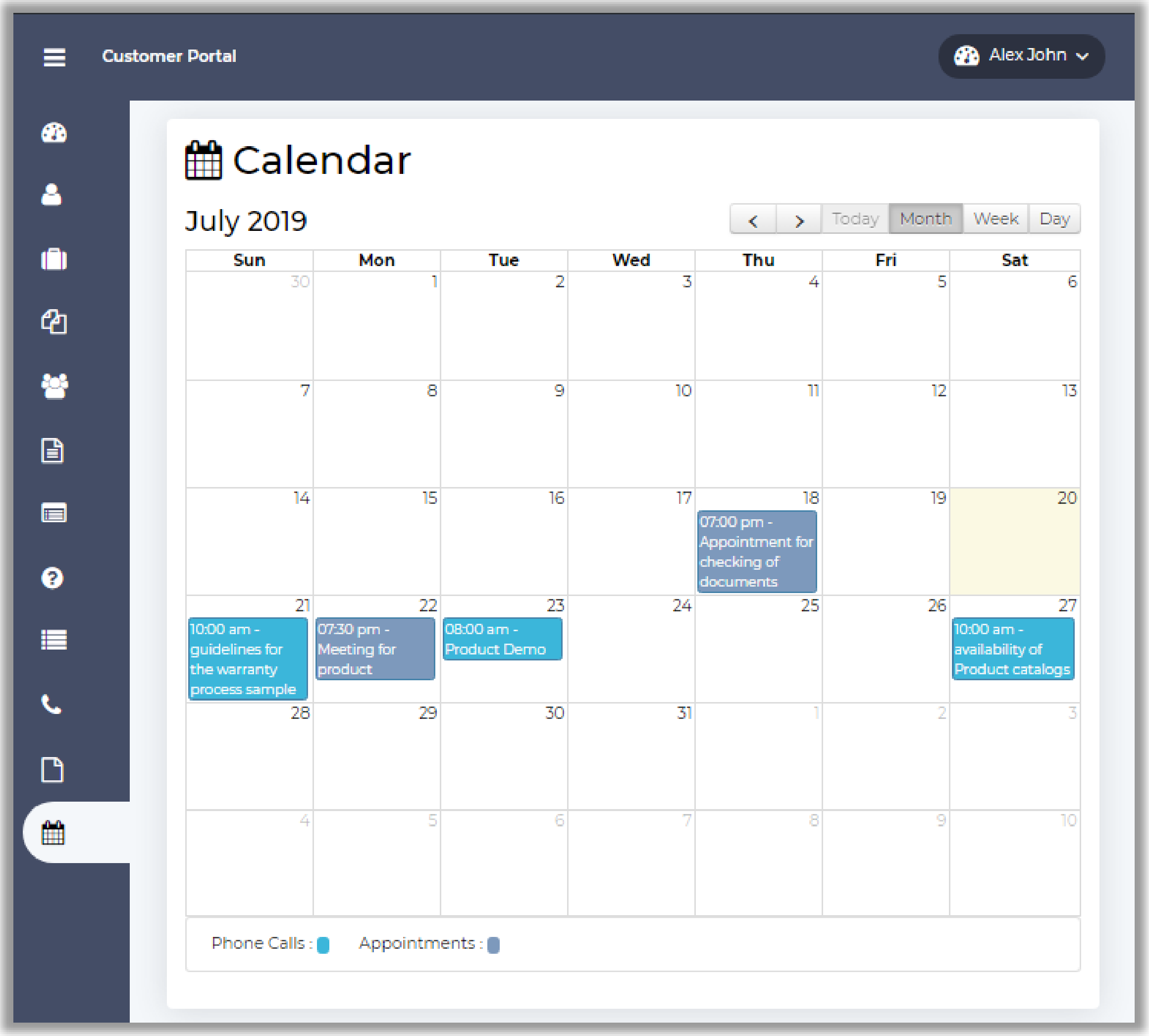
- For adding contact, navigate to contact tab and click on 'Add Contact' to add new contact.

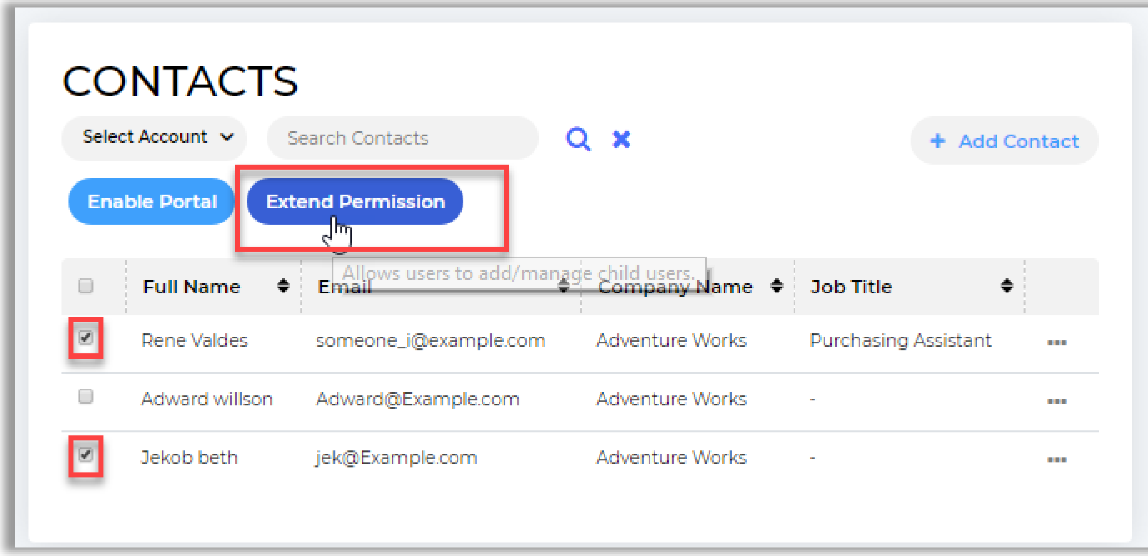


- You can also mass select contacts and provide access to them for portal or provide extend permission so that further they can create contact from portal itself to manage hierarchy.

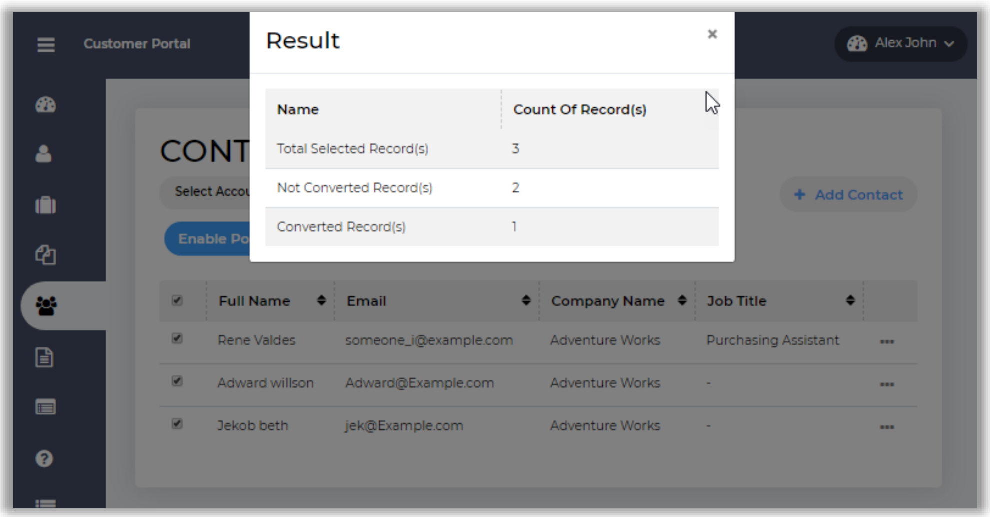
Calendar Page

- You can view **Phone Calls** and **Appointments** on calendar for a specific date with time.



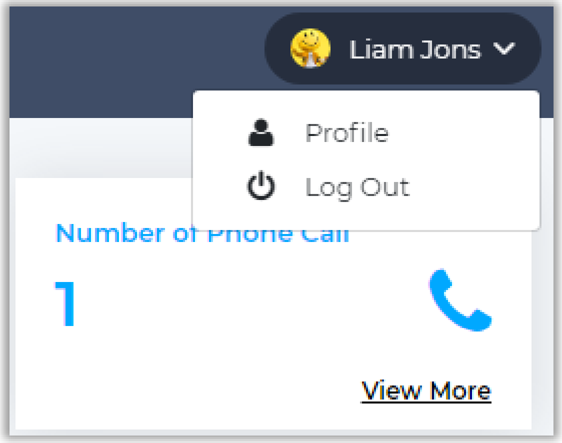


- Navigate to contact's list view and select the contacts to provide access of portal by generating credentials for them or give then extended permission.



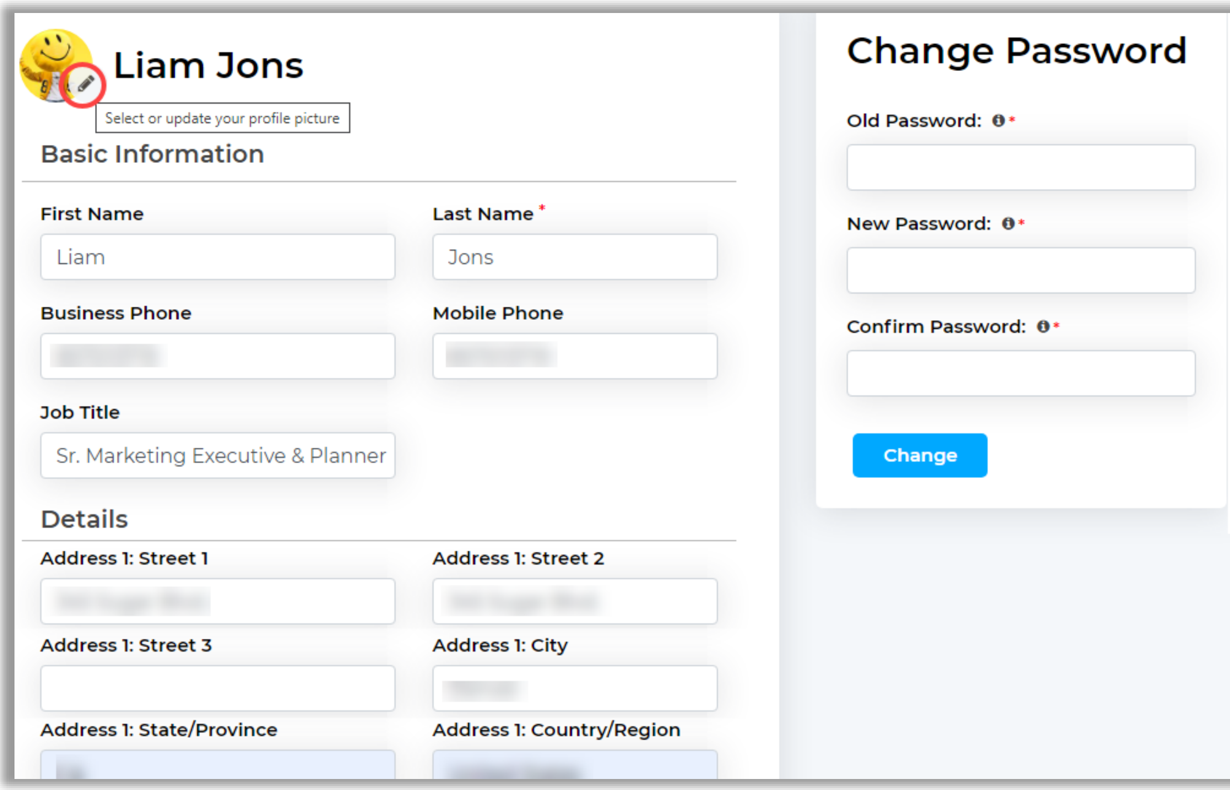
- It will provide the summary to converted and not converted contacts.

Profile



- The use can also update the profile and the **profile picture** as well.
- To change the Profile picture, navigate to **Profile**.

- By clicking on the **Profile** option, the user's profile details will appear.
- To change the current Profile Picture, hover the mouse cursor on the profile picture and click on the **edit** icon. By clicking on that, you can choose the picture from the local drive.

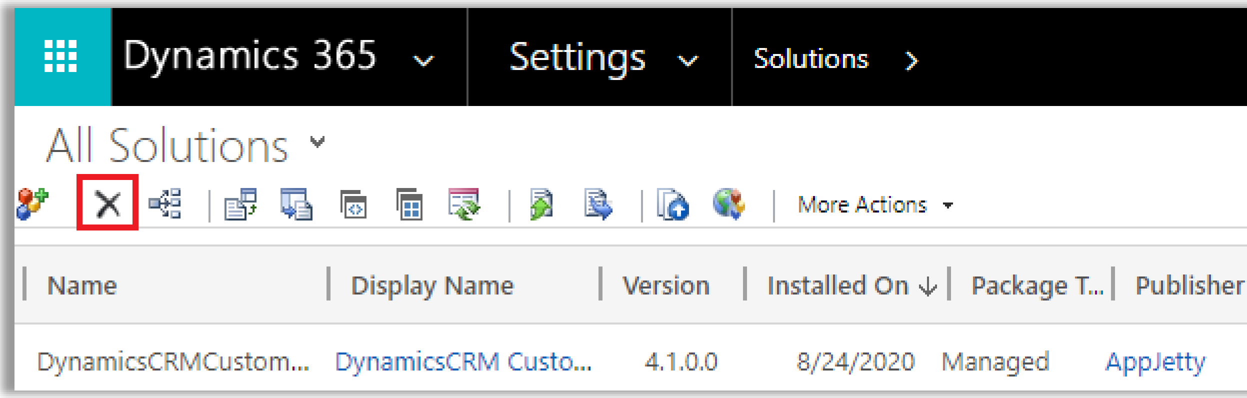


- Once the user selects the picture, it will be saved automatically and if there is any change in the profile details like basic information, address details, then user can make those and then click on the **Save** button.

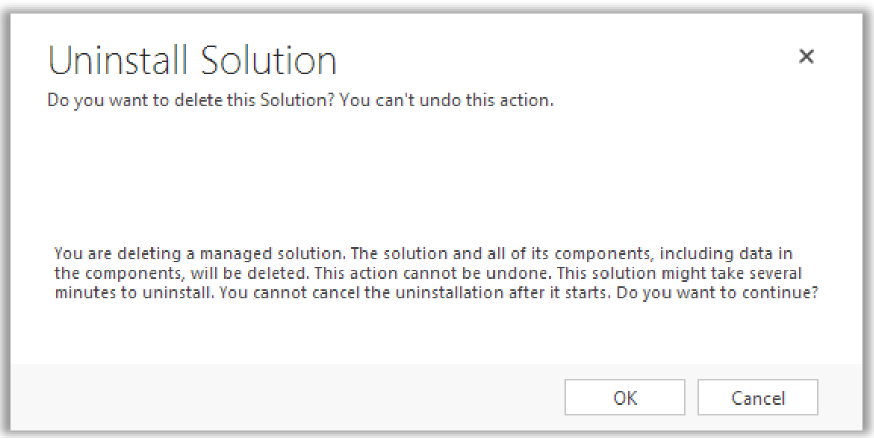
- All the changes will also reflect in the CRM side.

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' X** icon.



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



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-wordpress-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 **Dynamics CRM Customer Portal**, please write to sales@crmjetty.com