USER MANUAL

PortalNest Dynamics CRM 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)

TABLE OF CONTENTS

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 will get a dedicated dashboard and 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 Customer Portal

Being a proud customer of DynamicsCRM you can now manage your customers better by using customer portal. The DynamicsCRM Customer Portal will provide 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.

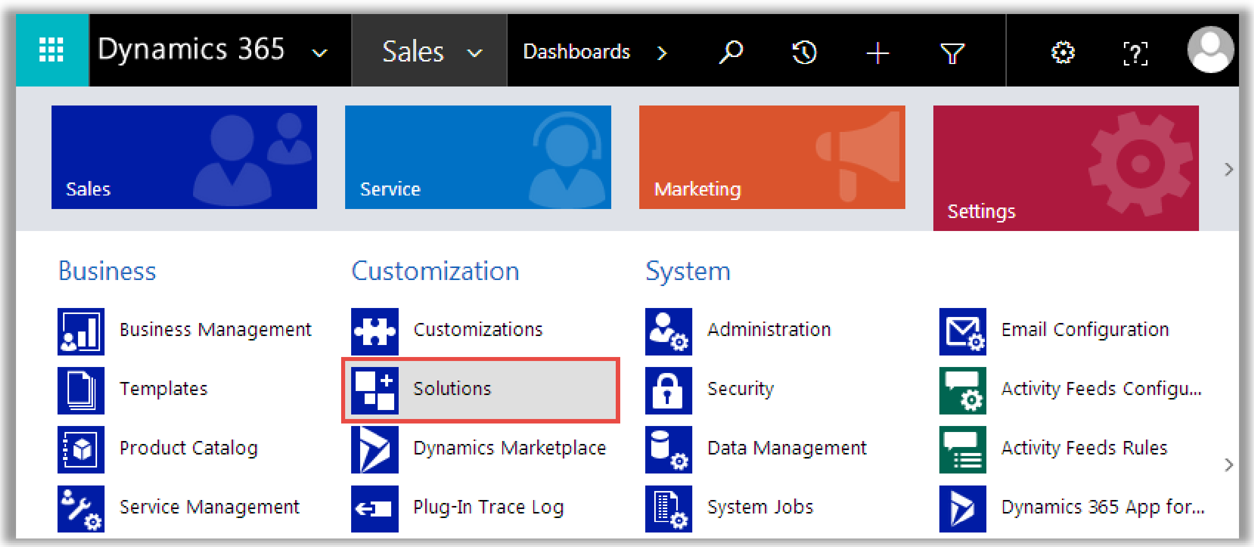
- You should login as an Administrator in DynamicsCRM.
- Check that your DynamicsCRM Instance is compatible for Customer Portal.
- If you are installing Customer Portal then make sure there should not be any older version of Customer Portal Plug-in already installed on DynamicsCRM. If there is any then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

Installation

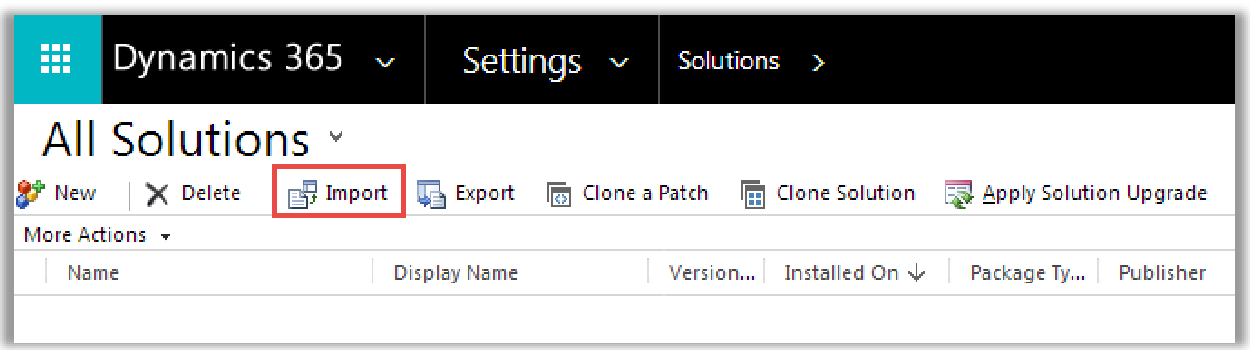
Dynamics CRM Plug-in Installation

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

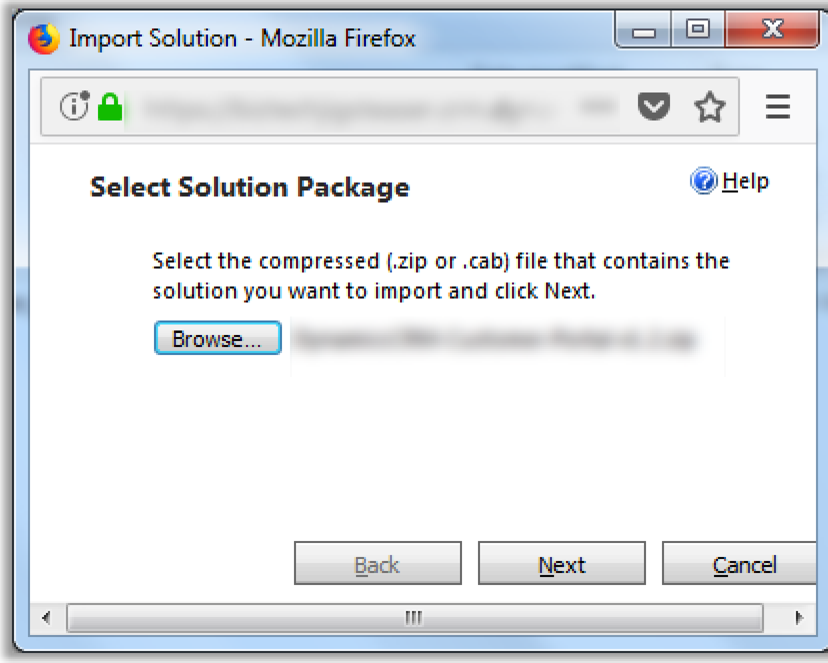
- Login into your CRM Account and click on **settings ->solutions**



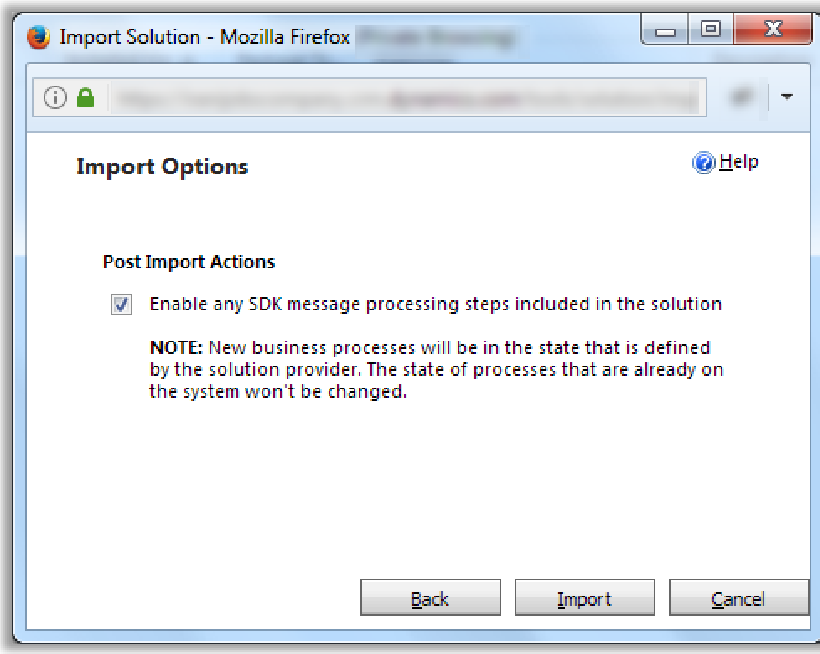
- Click on **'Import'** to upload and install the Solution.



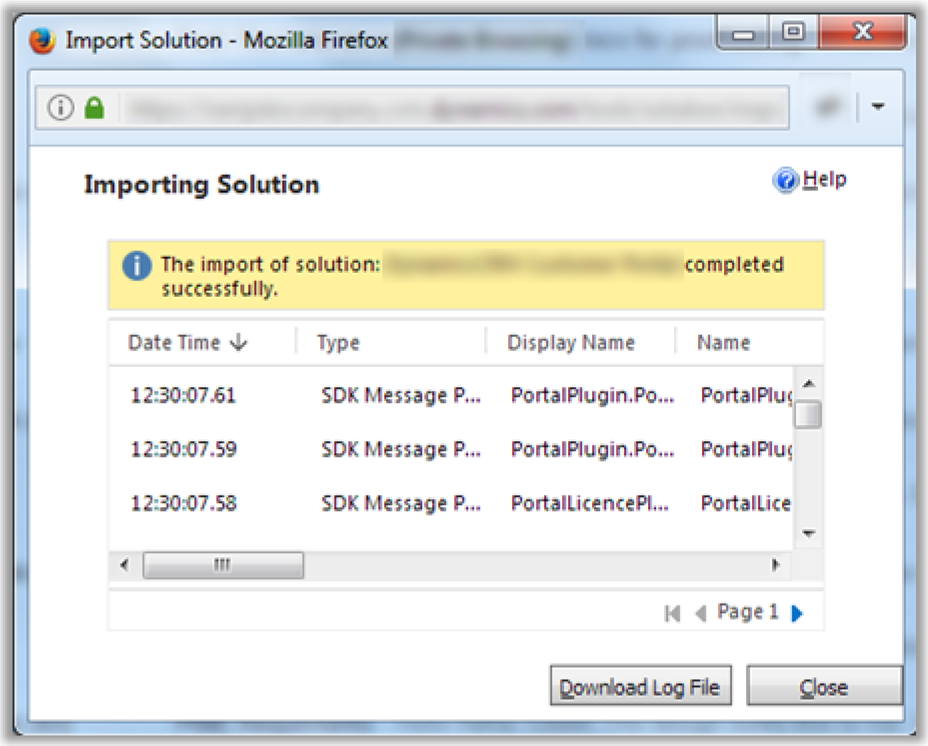
- Click on Browse button and choose the Package Zip File from the Import Solution Window.



- 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

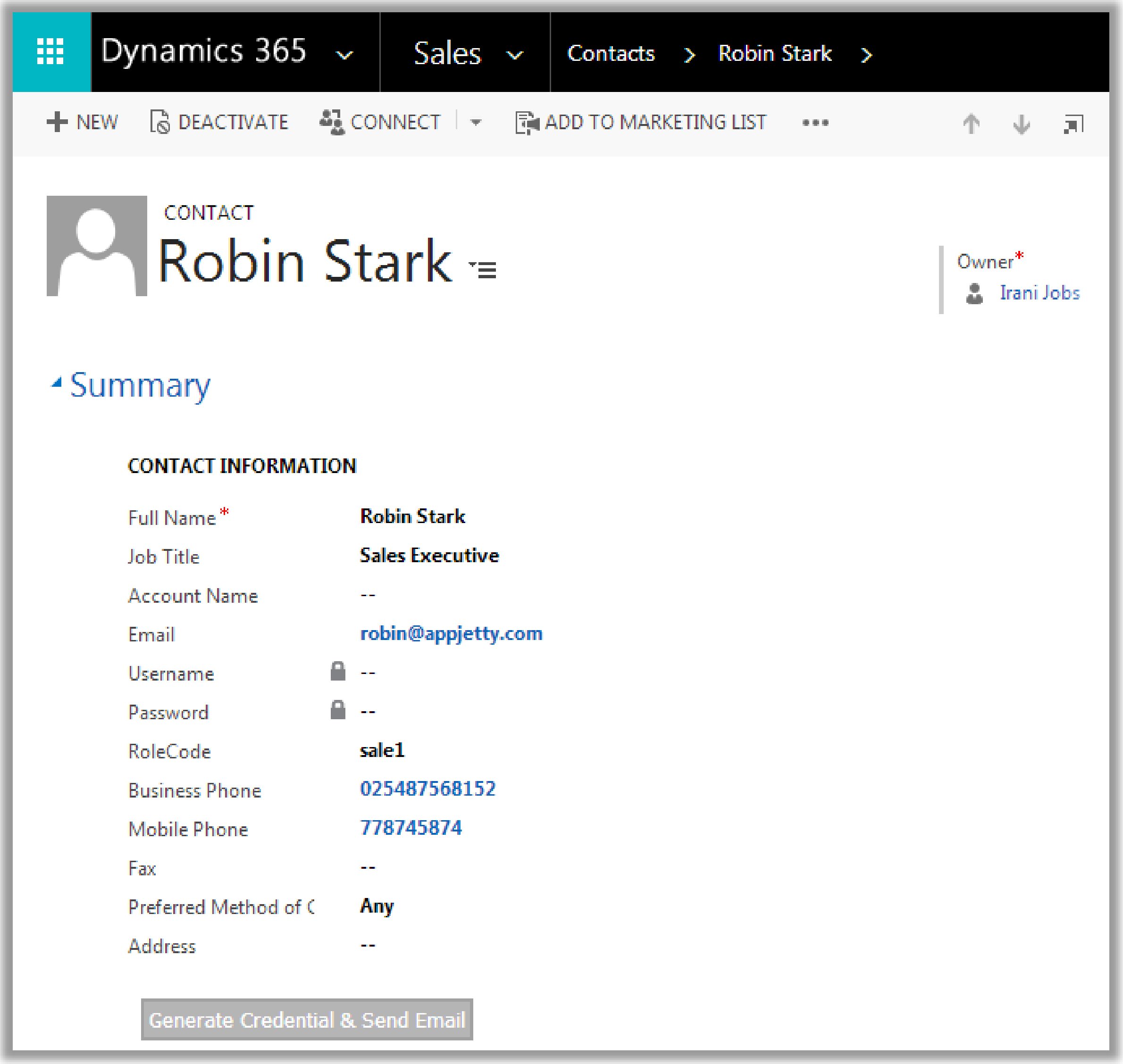
Note: PortalNest would be available within 2 days after the activation of trial request. We will prepare your instance manually and once it is done; our team will share instance URL via email.

Convert CRM contacts to Portal Users

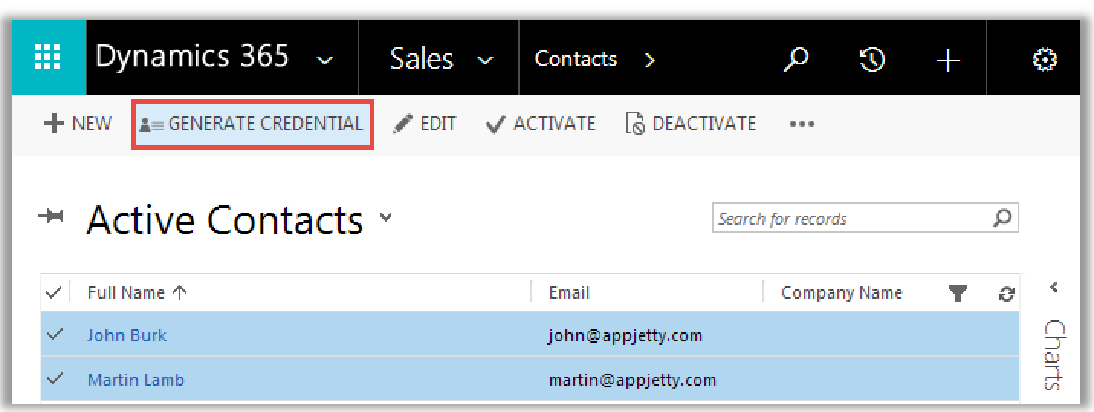
Note: For generating mass credentials it is must the configure your DynamicsCRM URL in PortalNest admin configuration. Once you have configured your CRM URL in PortalNest configuration navigate back to CRM for converting CRM contacts to Portal Users.

Generating Portal Credentials

- To generate portal credentials for a particular contact, navigate to **Sales -> Contacts**, 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 credentials for all the selected contacts and will be sent to their email address.

- This converted contact will be listed in customer tab in PortalNest Admin panel.

Note: Contact should contain email address.

Plug-in Configuration

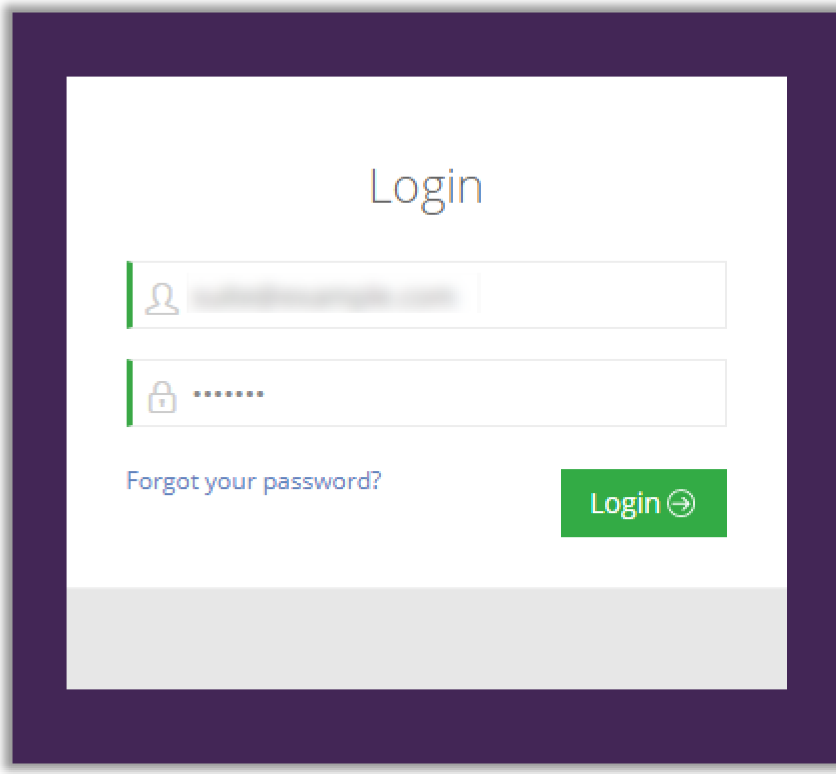
PortalNest Configuration Settings

Once portal is setup and configured with CRM you can use the provided domain. Using that domain and admin URL you can login to PortalNest for further configurations and customizing the portal.

Note: For using admin URL, enter domain provided to you with "/admin". For example, your domain is **xyz.portalnest.com**, then for admin you can use "**xyz.portalnest.com/admin**"

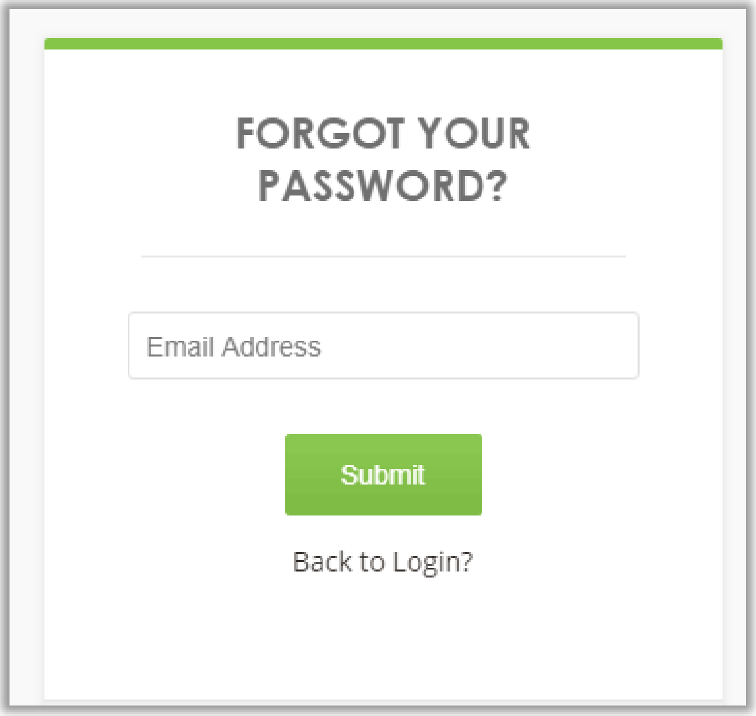
Login:

- Directly login to the admin side using your credentials.

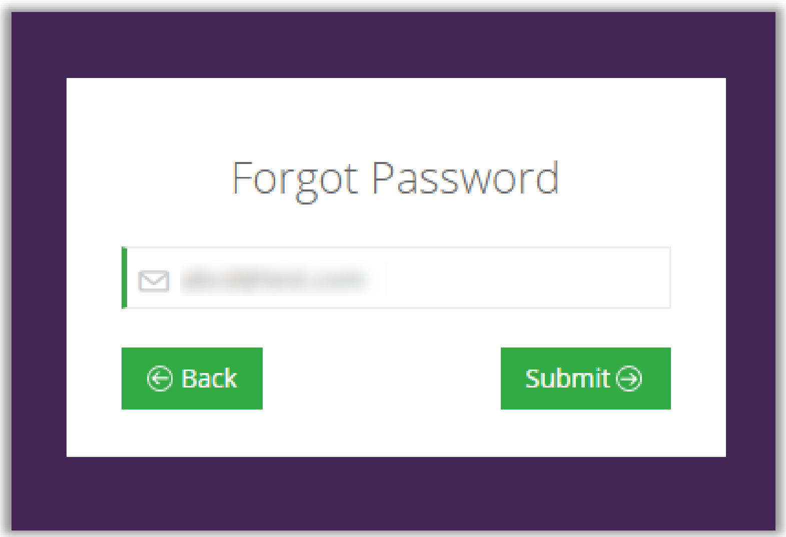


Forgot Password:

- Portal Admin can retrieve their login password using the ‘Forgot Password’ link. Click on ‘Forgot Password’ link and they will be redirected to CRMJetty’s forgot password, now enter the username and email address. Click on ‘Submit’ button to receive a password on the registered email address.

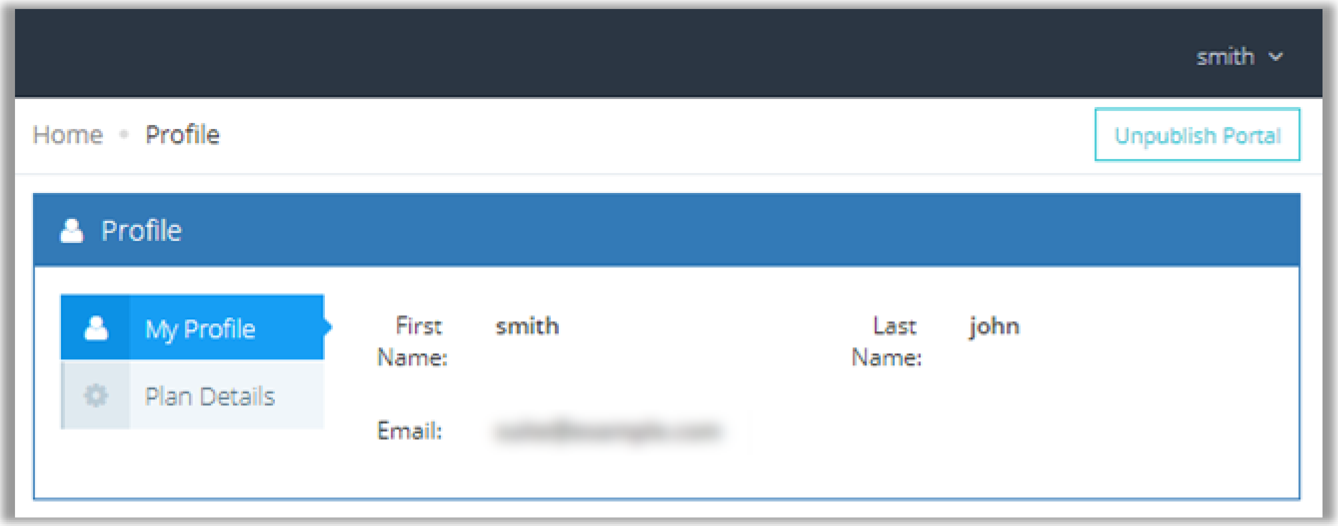


Note: Only master admins forgot password will be redirected to CRMJetty. For Sub-admin i.e., users will be redirected to PortalNest’s forgot password link.

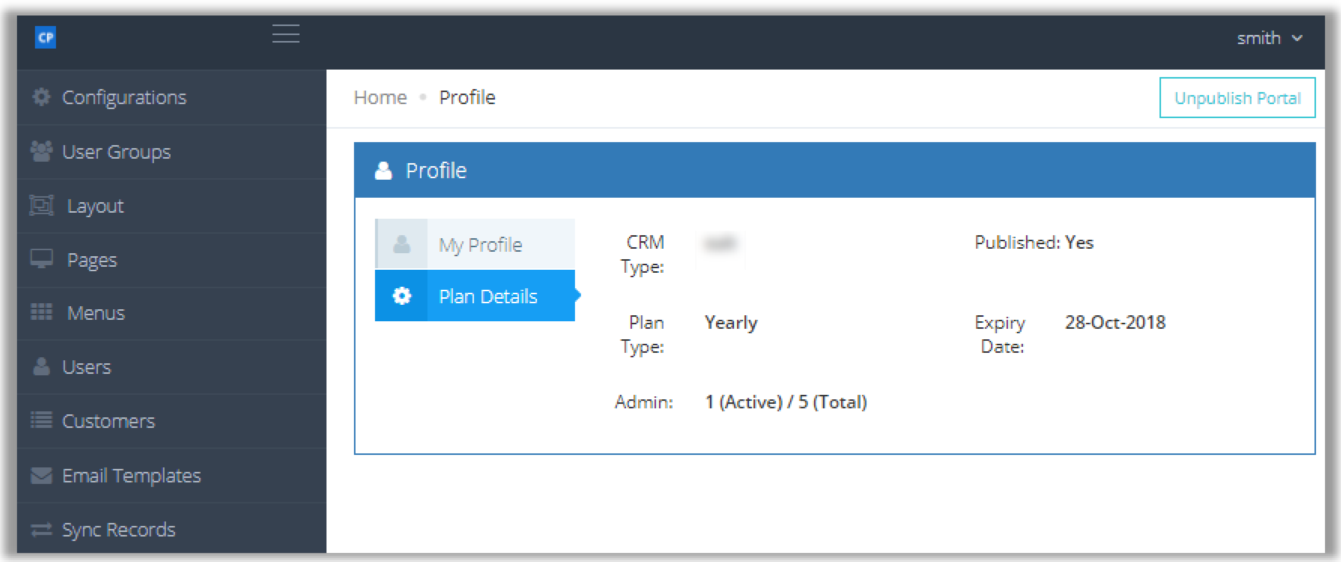


Profile:

- In Profile tab admin will find their personal profile. They can only view their own details



- Profile also contains plan details.



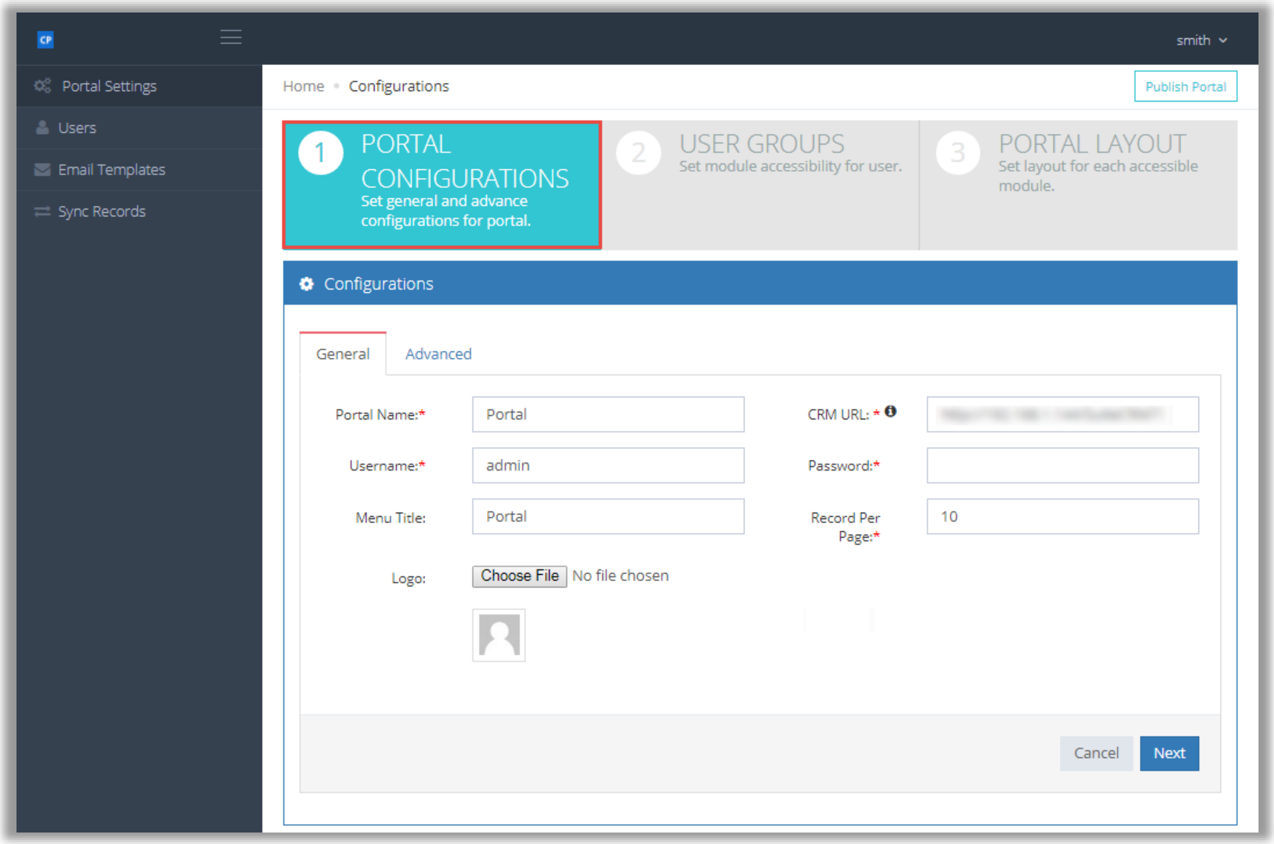
- Plan details tab contains plan details like type of CRM connection, plan type, expiry date, active sub admins.

Portal Settings:

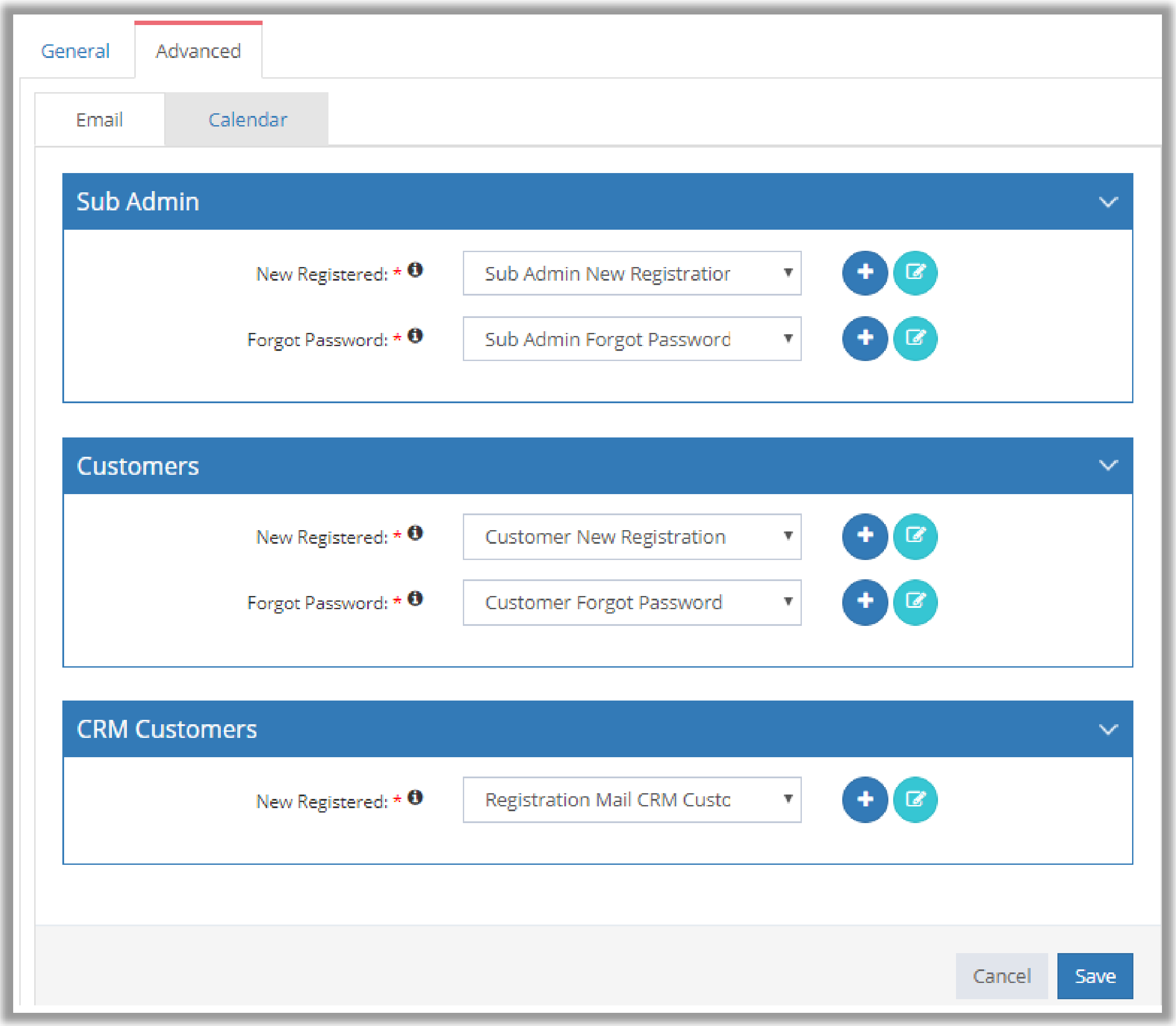
- Once you are logged-in, you need to go through three configuration steps i.e. portal configurations, user groups and portal layout and publish the portal once otherwise it will remain disable.

- You will be navigated to **"Portal Settings"** page where you need to do general configuration to setup and publish the portal.

- **Portal Configuration:** Set general and advance configurations for portal.

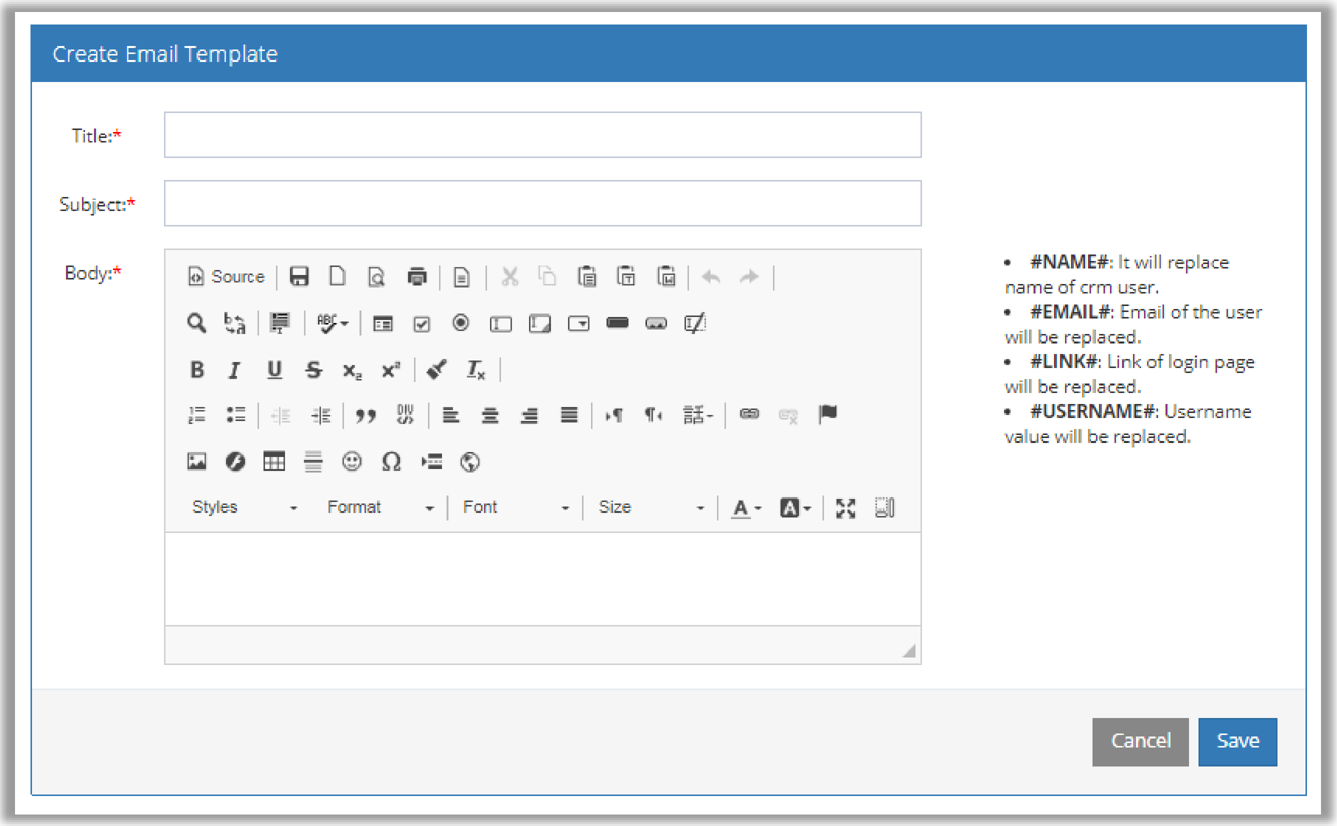


  - For general settings enter appropriate portal name which you would like to display in portal.
  - Enter you CRM instance URL
  - CRM admin credentials (Username and Password).
  - Enter appropriate menu title, record you want to display per page and logo.
  - If you are done with general settings, click on "Next" button for advance settings

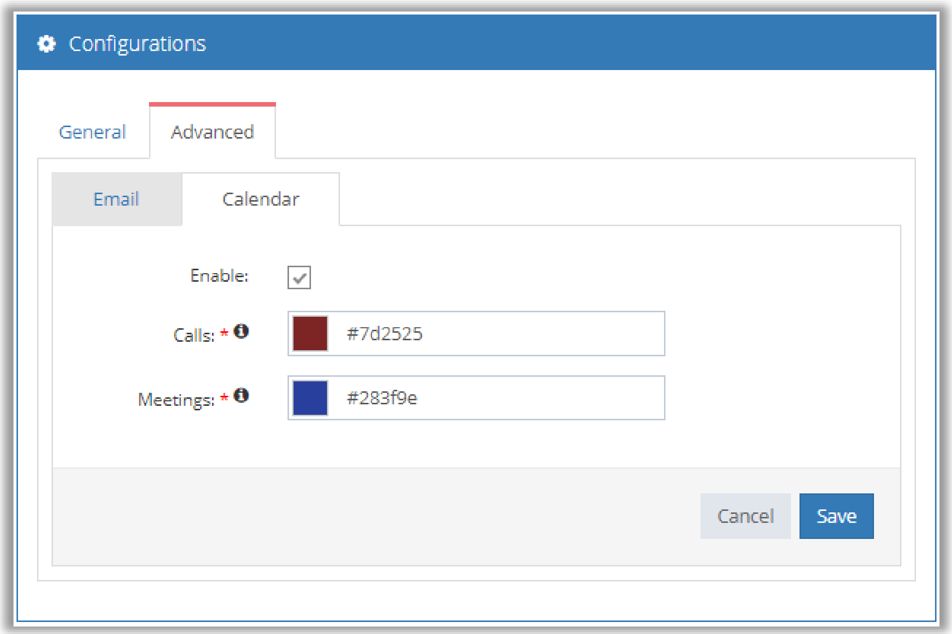


- In advance settings -> navigate to email settings, setup the email templates for sub admin, customers (sent when registered from portal) and CRM customer (sent when mass generated credentials for customers) depending upon the requirement.

- You can also add new email template or edit the existing email template.



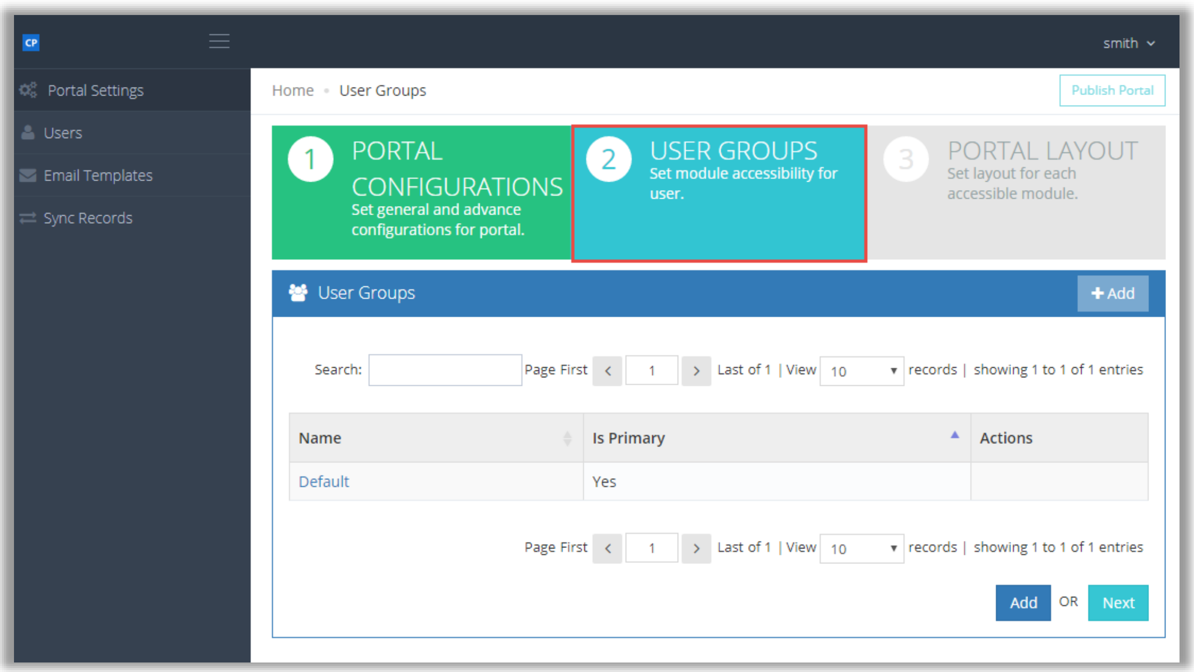
- Add appropriate title, subject and body for email template.
- You can also customize styles, font etc based on your requirement as well as there are predefined keywords which will replace the actual content.



- Navigate to email tab, check the box if you want to enable calendar in portal.
- Also choose the calendar color for calls and meetings.
- Once you are done with the general and advance settings in portal configurations tab save them and navigate to general settings tab, click on next for navigating to **"User Group"** page.

User Group Settings:

- Customer portal provides feature to manage CRM Module's accessibility for their portal users. You can decide access of which module should be provided to which customer by User Group module.

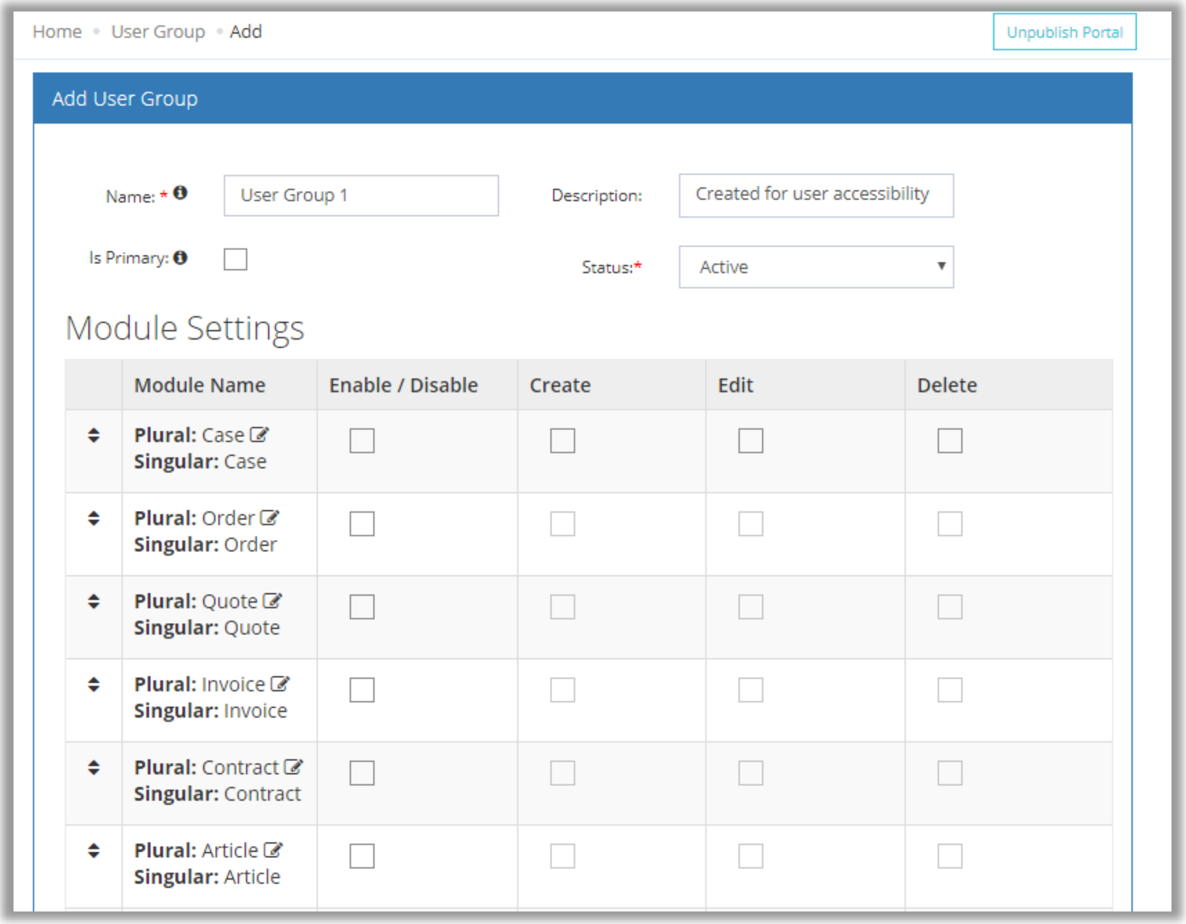


Note: By default, 'Default' group will be assigned to a newly created contact record.

- Navigate to **'User Groups'** tab and you will be redirected to the User Group Module's List View. Here, you can see **'Default'** User Group already exist in the list. User cannot delete this **'Default'** group record.
- Admin can create different "**User Group**" to provide access to certain defined modules by clicking on "Add" button. Admin can also set dynamic access rights for each accessible module.
- To provide dynamic access rights to portal users, create a User Group and save it. You will get a list of Portal enabled modules.

- To enable a module, check the box option. To provide dynamic access rights of **'Create'**, **'Edit'** and **'Delete'** check the boxes against each enabled module.

Note: There will be only one Primary Group at a time. Primary group is used when new user is created in front.



- To set the order of module click "Module name", Now Drag and Drop modules for reordering. The same order will be reflected in the portal.

- Click on edit option beside specific module name to set plural and singular module names or want to rename the module according to the requirement.

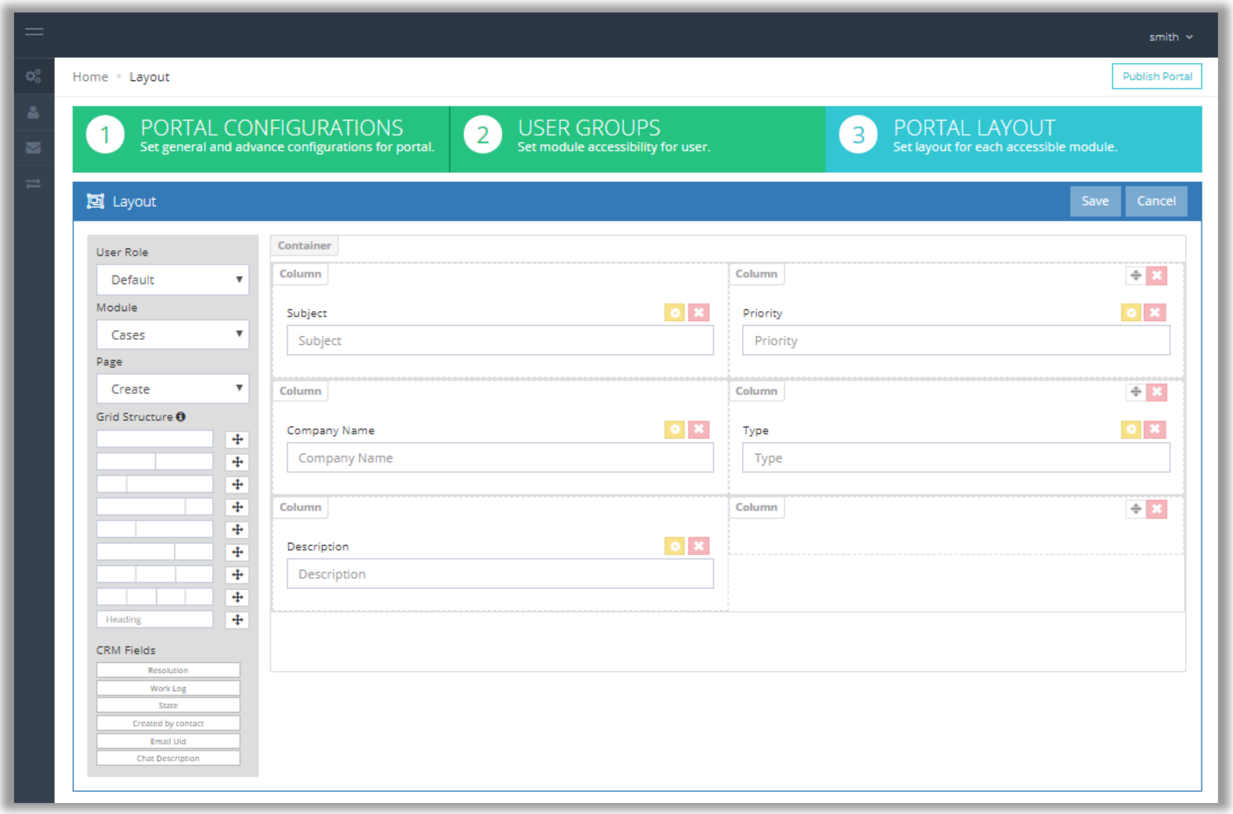
- Once the user group settings are done, click on "Next" button to set portal layout.

Portal Layout:

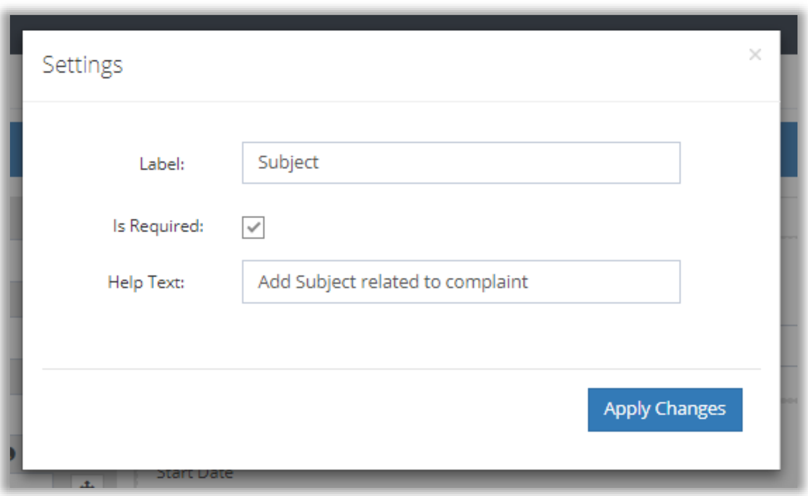
- To avail CRM modules into your customer portal, it is mandatory to set Portal Layouts for each accessible module. Customer Portal plug-in provides facility to set Portal Layouts for all accessible modules of CRM.

- From portal layout tab select your desired User group, 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.

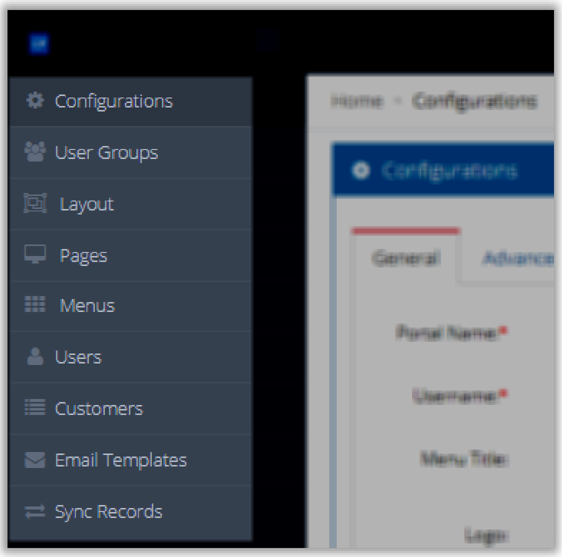


- You will also have option to set field label, it is a compulsory field or not and any help text related to that field.



- After completing all three configuration steps i.e. portal configuration, user groups and portal layout, click on publish button to enable the portal.

- Once the portal is published, the configuration steps will be removed and general menu will appear for admin settings.



- With admin settings there will be "Unpublish Portal" button which you disable the portal for front users.

Note: Before publishing portal only portal settings, users, email templates and sync records menu tabs are enabled.

Admin Configurations

- Now from menu tab admin will get variant option for setting and configurations.

Configurations:

- Configurations includes general settings and advance settings which are set in **"Portal Settings"** tab.

- You can edit the existing general and advance settings from this configurations tab.

User Group:

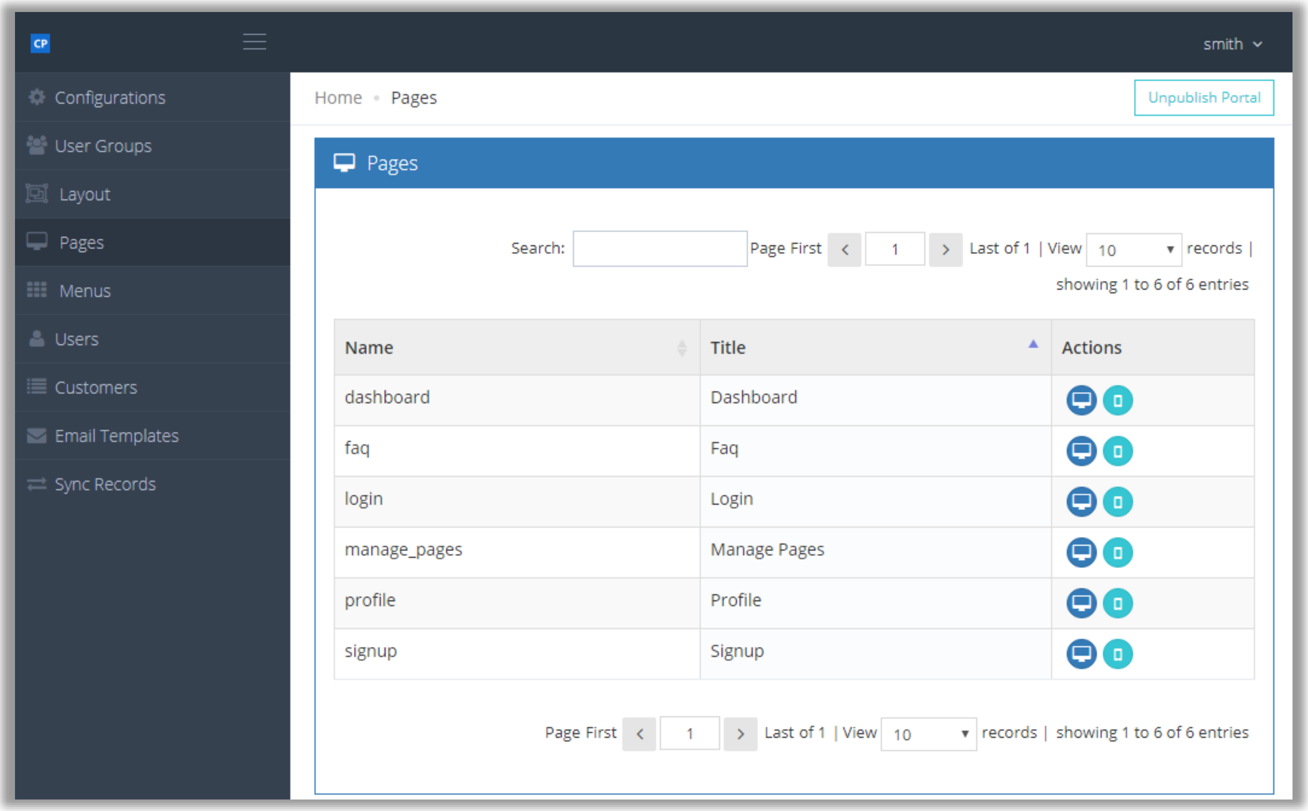
- If admin want to change the primary user group or add new user group the set module accessibility with dynamics access right. Navigate to user group tab and perform required actions.

Layout:

- Portal layout allow you to set module's form wise layouts i.e. for edit, detail and create view.

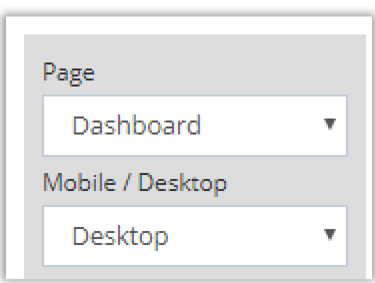
Pages:

- Navigate to pages tab to set page layouts. There is list of default pages i.e. Dashboard, FAQ's, Login, Manage Pages, Profile and signup.



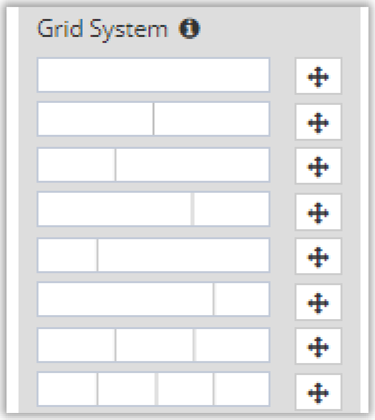
- For this default pages you can set desktop layout as well as mobile layout. You will also have option to copy to desktop layout to mobile layout.

- For designing the page layout navigate to detail view and select page and view (i.e. mobile or desktop).



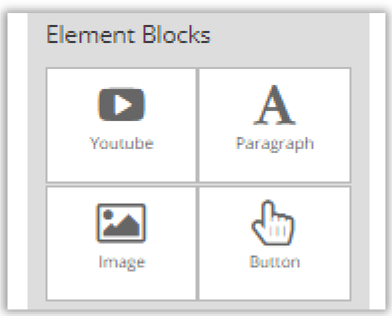
- Now drag the grid from the grid system to divide that row into columns. There are different options which provides you size variant to divide rows.

Note: Maximum you can divide row into four columns.



- Once you get the desired page divisions you can add required blocks to that division. Here, blocks are divided into two different types. They are as below:

  - **Element Blocks:**



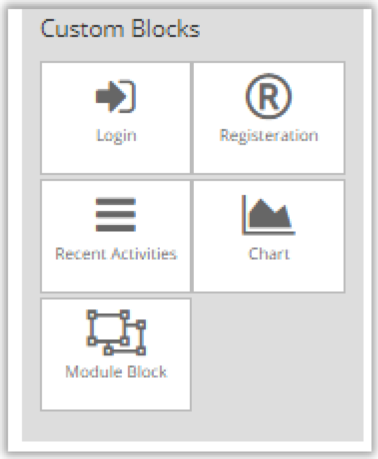
    - There are 4 different types of element blocks. They are as mentioned below: -

      - **YouTube:** Set video in the block, specific video text and embedded URL.
      - **Paragraph:** Used to set heading and formatted text value. For setting FAQ's and Descriptive text this block is used.
      - **Image Block:** It allows you to add image for that specific section. To set image

- Choose Image
- Click on uploads button and wait for updated URL.
- Set other required details and click on apply changes.

▪ **Button Block:** It allows you to set button on page. Add desired button label and navigation URL.

- **Custom Blocks:**



○ There are 5 different types of custom blocks. They are as mentioned below: -

▪ **Login:** It set the login functionality for front users. It will display the fields for login form. Login settings will allow to add heading, Login button label, enable disable Register button and can set Register button label.

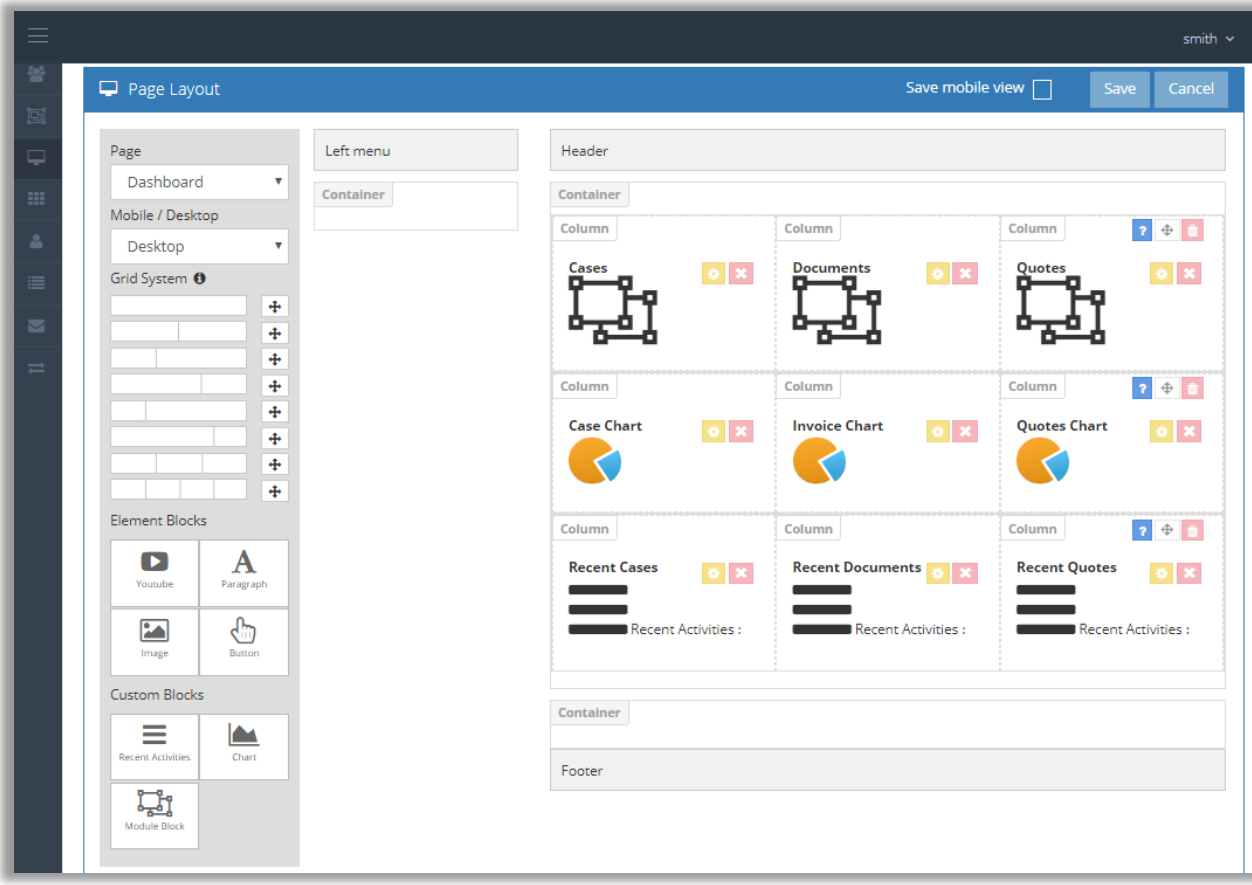
▪ **Registration Block:** It set the Registration functionality for front users. It will display the fields for registration form. In front side registration form will set as per CRM fields for contact module. Settings block will allow to set heading, register button label and enable/ disable cancel button.

▪ **Recent Activities Block:** It will set the top 5 records of selected module in front. Setting block allow to select heading and Module for which want to display recent records.

▪ **Chart Block:** It allow to set charts for Cases, Quotes or Invoice module for all status from settings block.

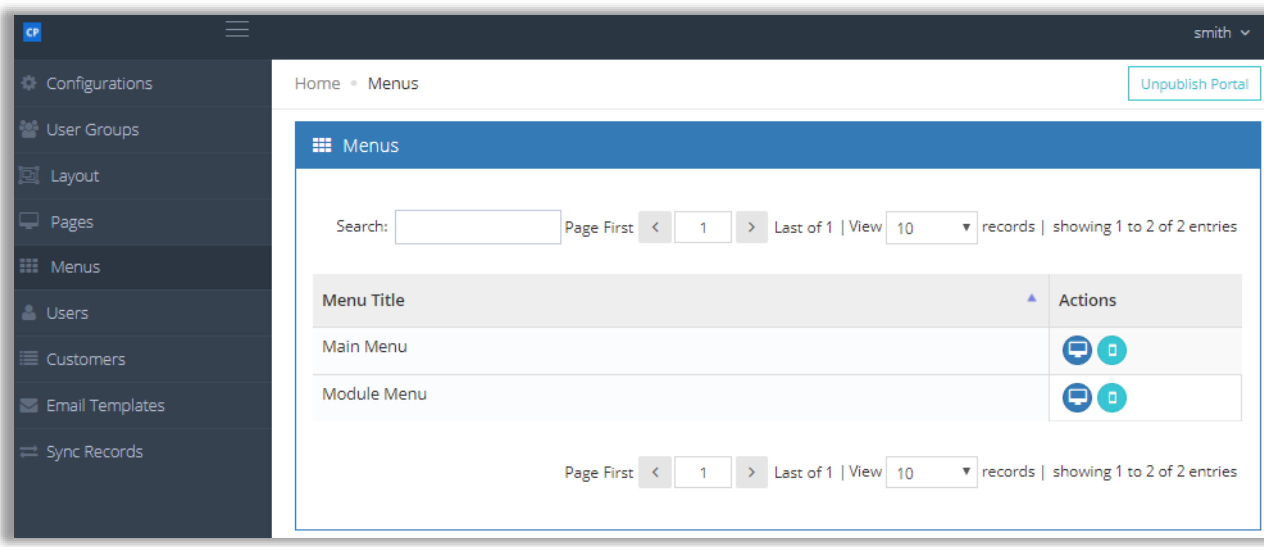
▪ **Module Block:** This is the counter block used to set counter for modules. Setting block allow to select module for which you want to get the counters of records. Also, can set color schema and icon for block.

- Now after all this setting you will have actual idea how page layout will appear in front.

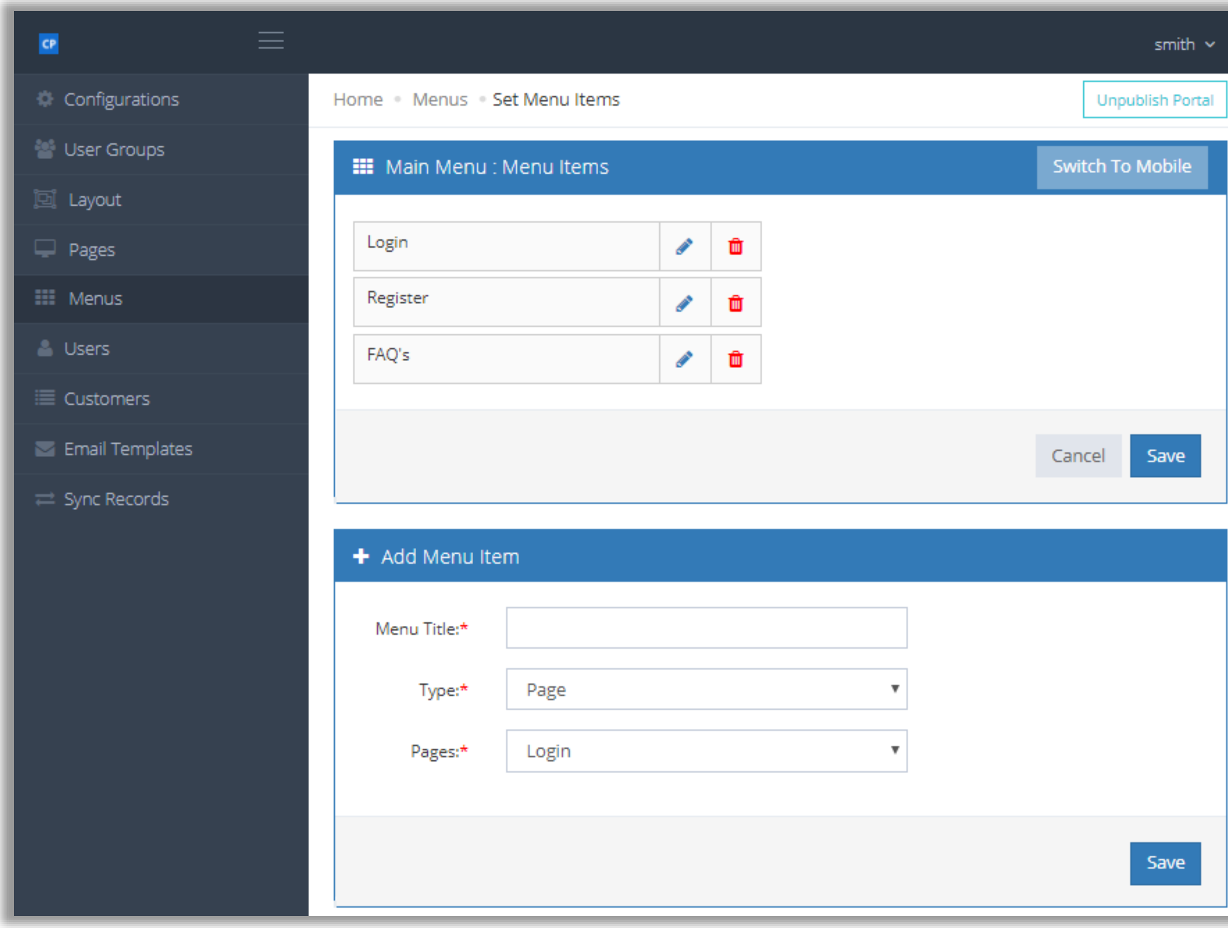


Menus:

- Menu tab contain two types of menus. They are main menu and module menu. You can set menu for both desktop as well as mobile view.



- **Main Menu:** This will set menus before login pages for front side. By default, Login, Registration and FAQ's menu is set.



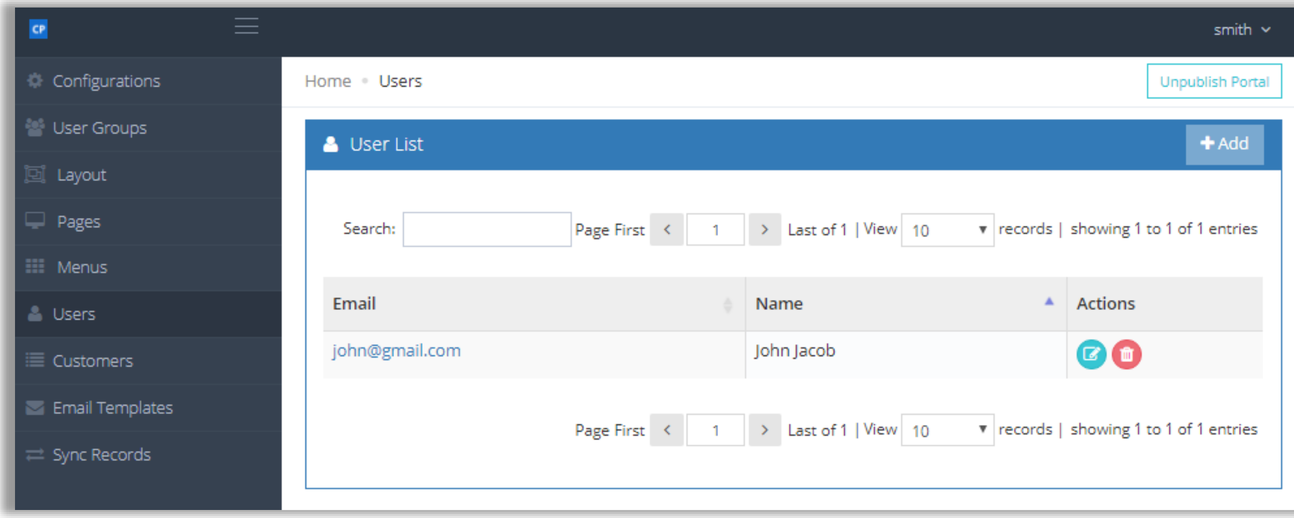
- **Module Menu:** This will set menus for after login in left menus with CRM module listing.

- You can also add menu item and edit the existing one. Select/Add any predefined page or external link for that menu.

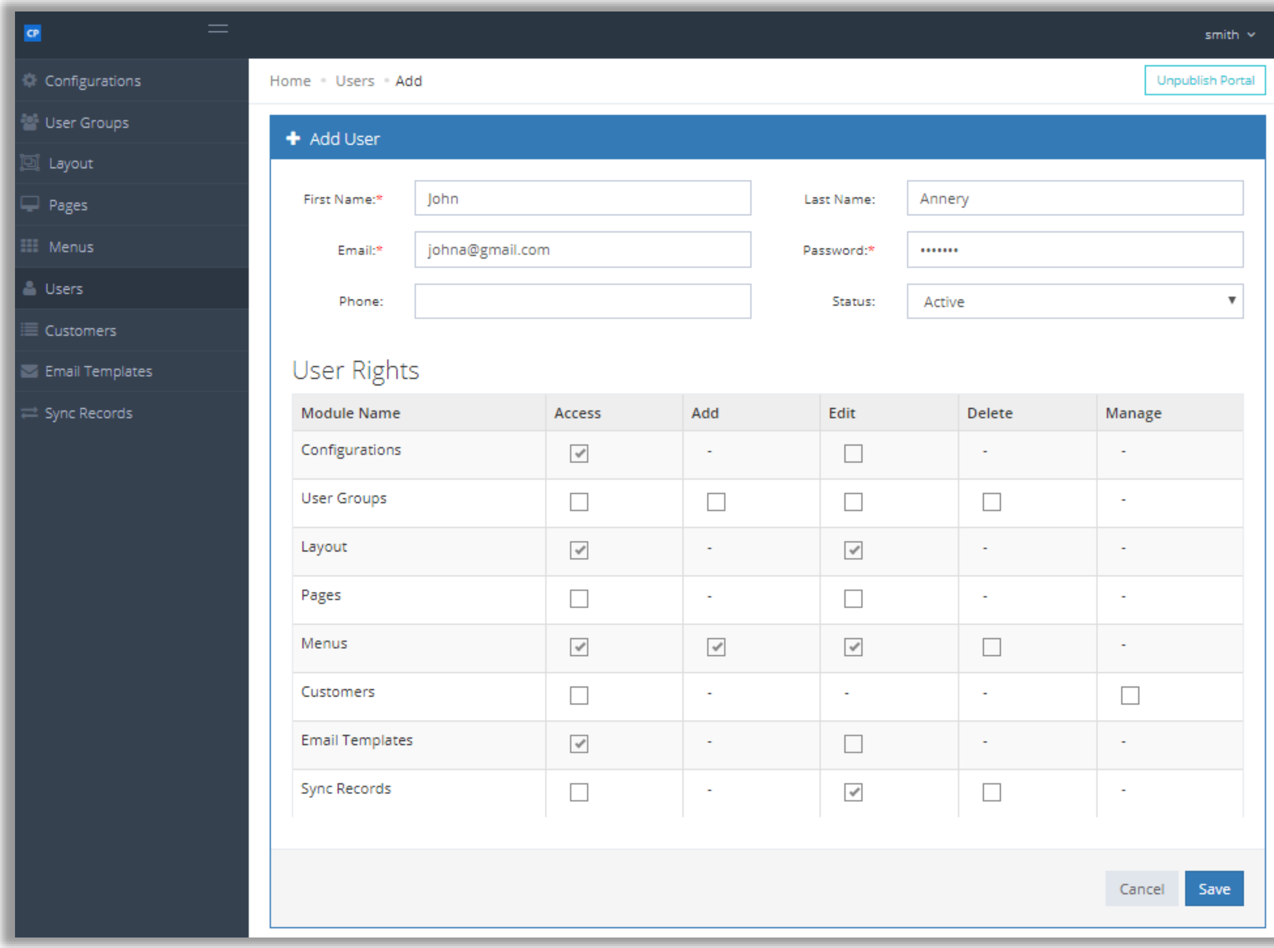
Note: Page list will be different for main and module menu.

Users:

- Users are sub admins which are created for managing admin panel same as Main Admin. Sub admin will be provided Access of required configurations with add, edit, delete or manage rights.

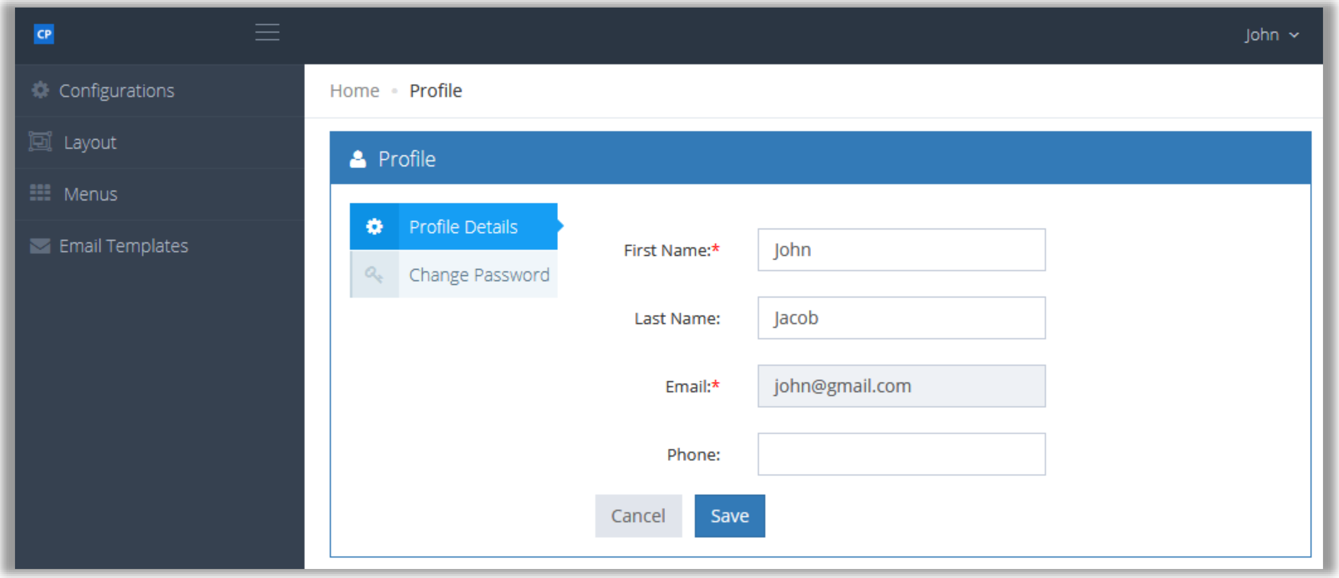


- You can add user by clicking on **"Add"** button.

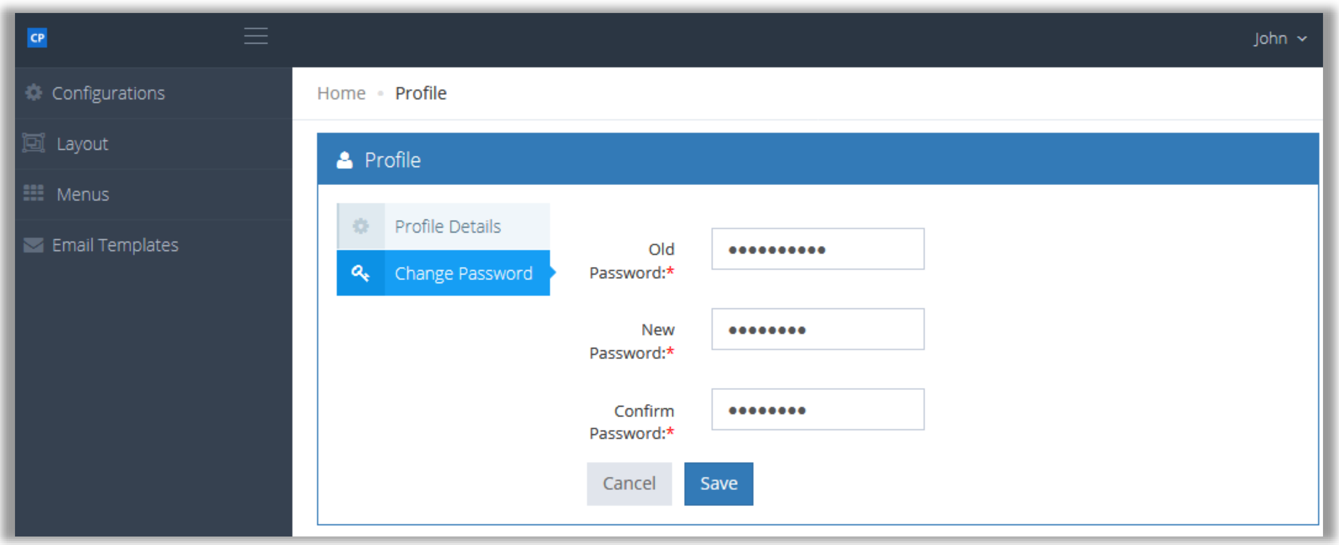


- Add user details and provide access rights to them. Once you are done with the details click on **"Save"** to add user.

- If the user is added, he/she can login using their credentials and perform admin side configurations assigned to them.



- Once they login they will have option to view/edit their profile details.

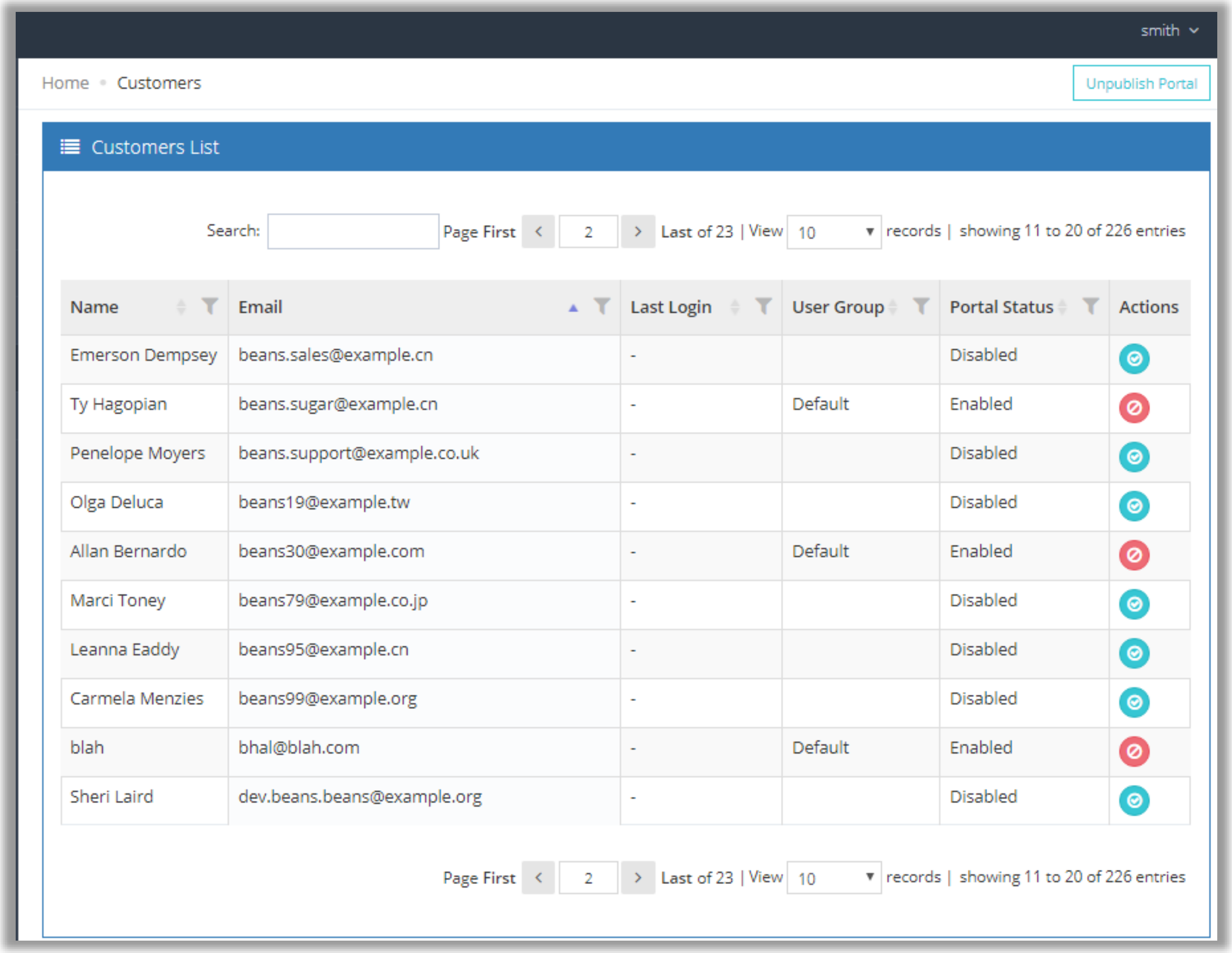


- They can also update their existing password to new password.

Customers:

- Customers are basically CRM contacts. List of customers will be fetched from CRM. If any portal user register from portal it will get reflected in customers tab as well as CRM contacts.

- Portal Admin can enable/disable customers for using portal front



Email Templates:

- Once you have set email template before publishing the portal and if you want to modify them i.e. add new or edit the existing one you can perform those actions from email templates tab.

Sync Records:

- Sync records manage the entries which fail to reflect in CRM when added from Portal Front side.

- There might be some situations like connection lost or CRM response issue, at that time entries will get added in sync records tab.

- If admin wants they can select and sync those entries which failed to get reflected in CRM, so that they get added in 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-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