

## USER MANUAL



# Dynamics CRM Customer Portal for WordPress

**Version: 3.1.0**

**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 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.

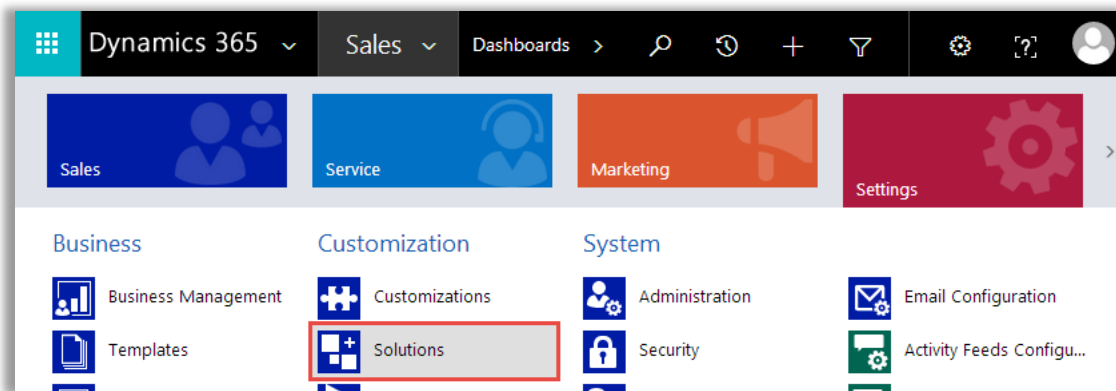
- You should login as an Administrator in Dynamics CRM.
- Check that your Dynamics CRM instance is compatible for Customer Portal.
- You will require a Product License Key to activate the Plugin. To obtain the License Key just drop us a mail at [support@crmjetty.com](mailto:support@crmjetty.com) along 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

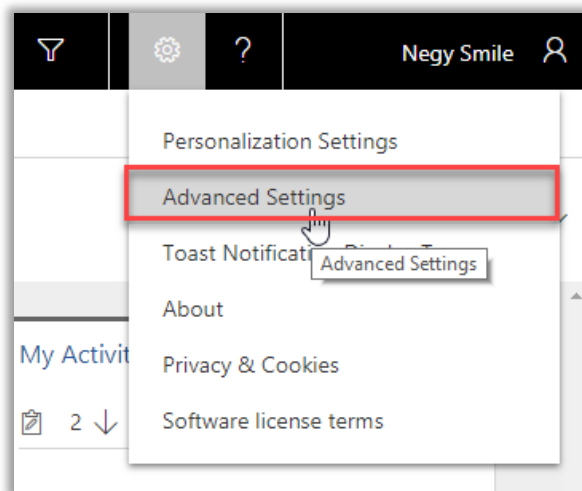
To install 'Dynamics CRM Customer Portal' plugin, the following steps has to be followed:

- 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**.

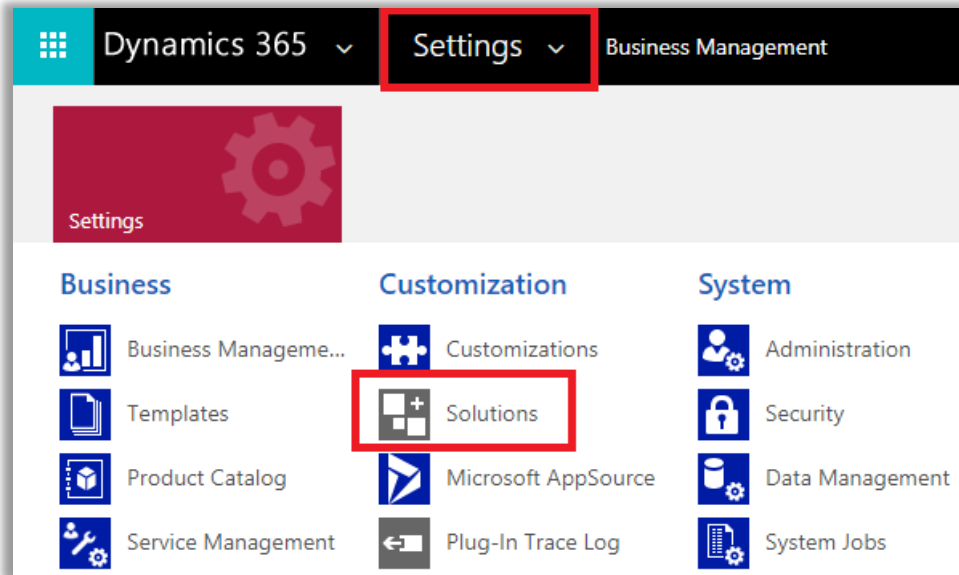


Or

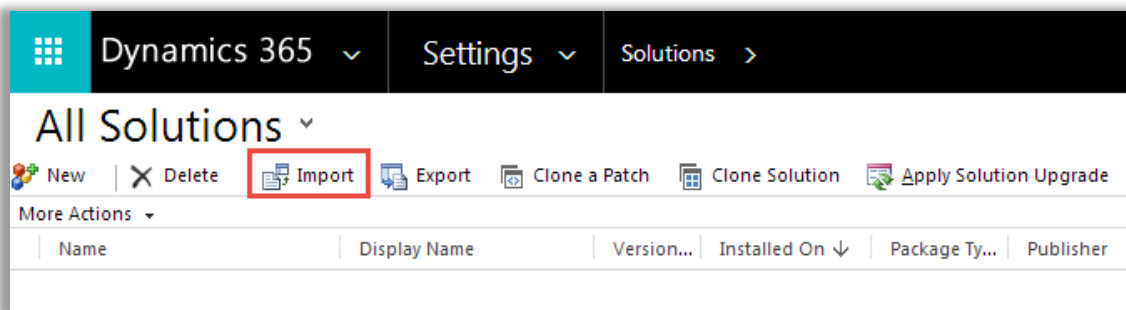
- If you are in unified interface, click on **Settings** icon given on the right side of the title bar. Then click on **Advance Settings**.



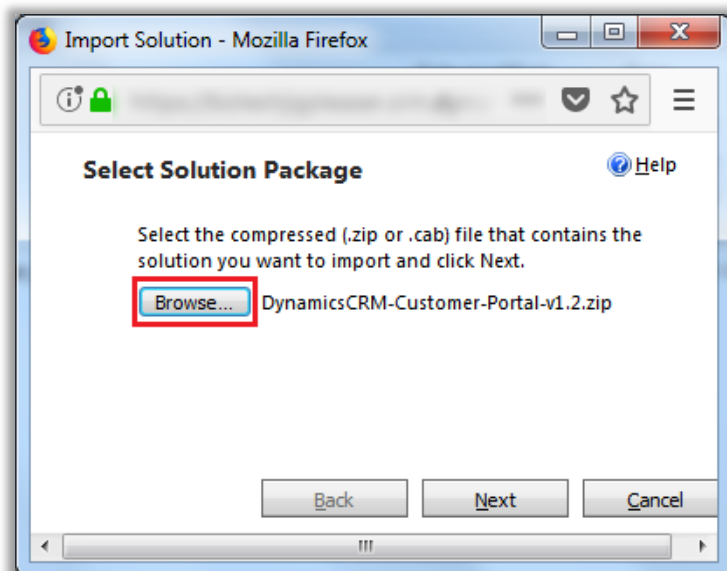
- Now, Navigate to **Settings** → **Solution**.

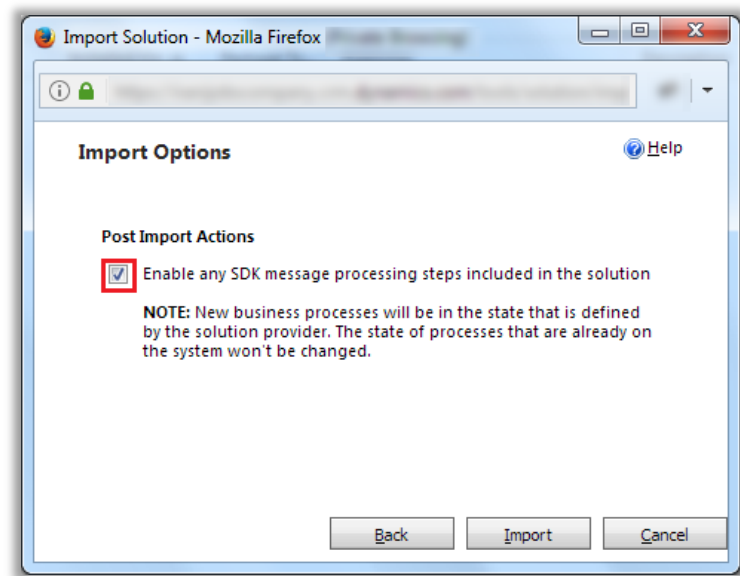


- Click on 'Import' to upload and install the Solution.



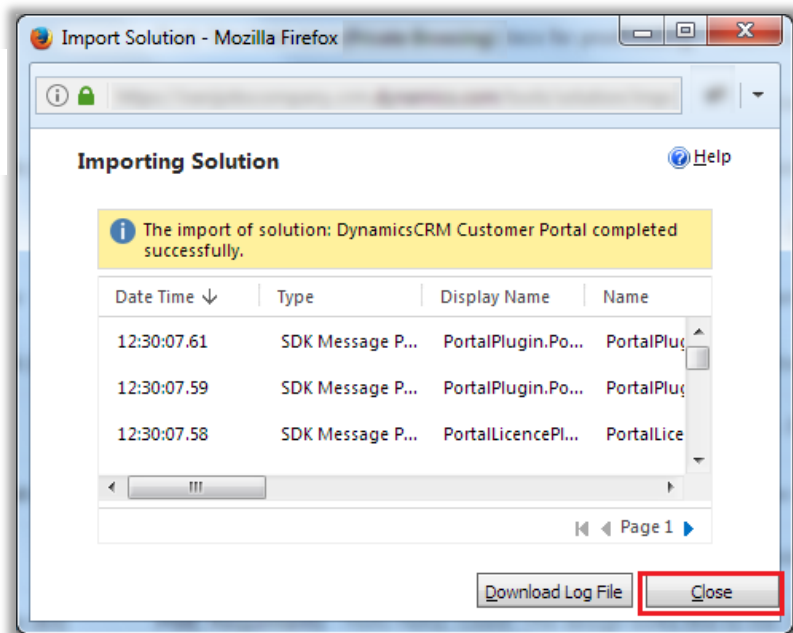
- Click on **Browse** button and choose the Package Zip File for Dynamics CRM Customer Portal from the Import Solution Window.
- Click on **Next** for further processing.





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

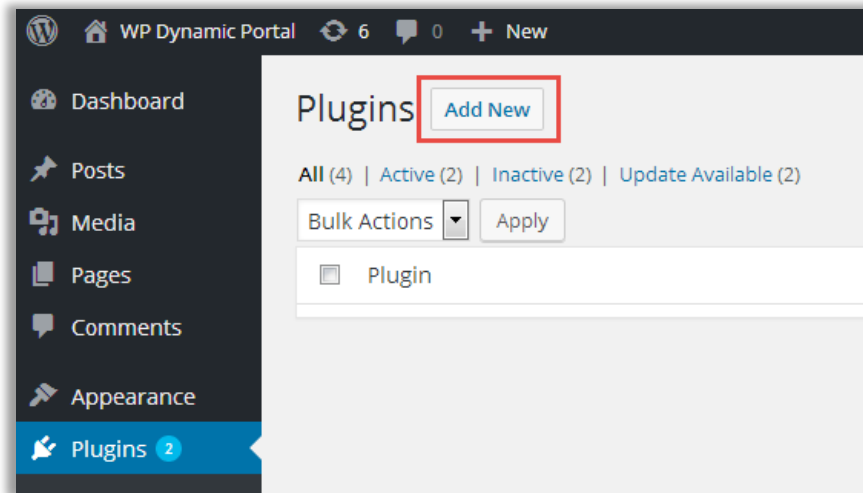
- Click on 'Close' after successful completion message is displayed.



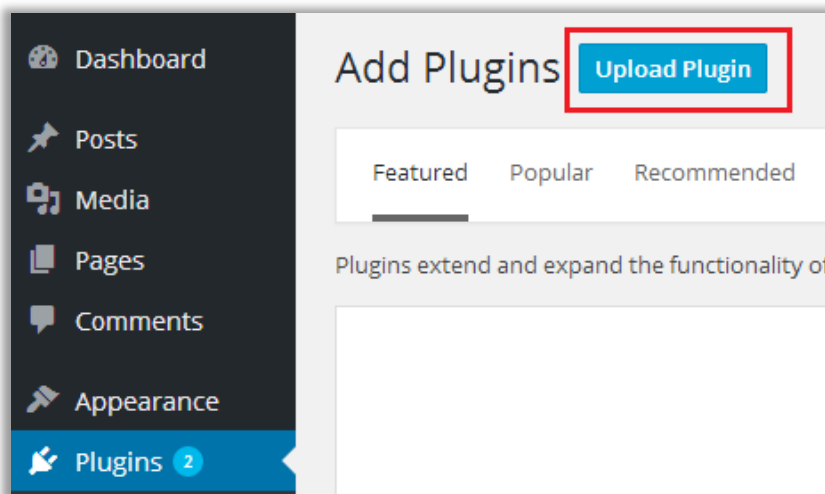
- Once you import the solution, it will be displayed in the solutions grid view.

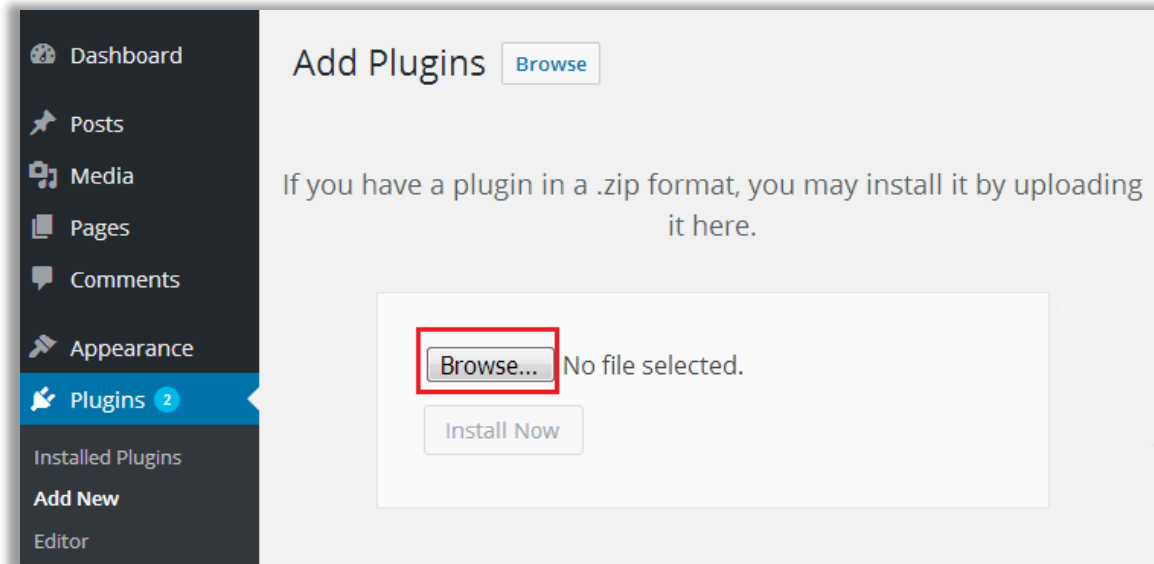
## WordPress Manual Plug-in installation

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

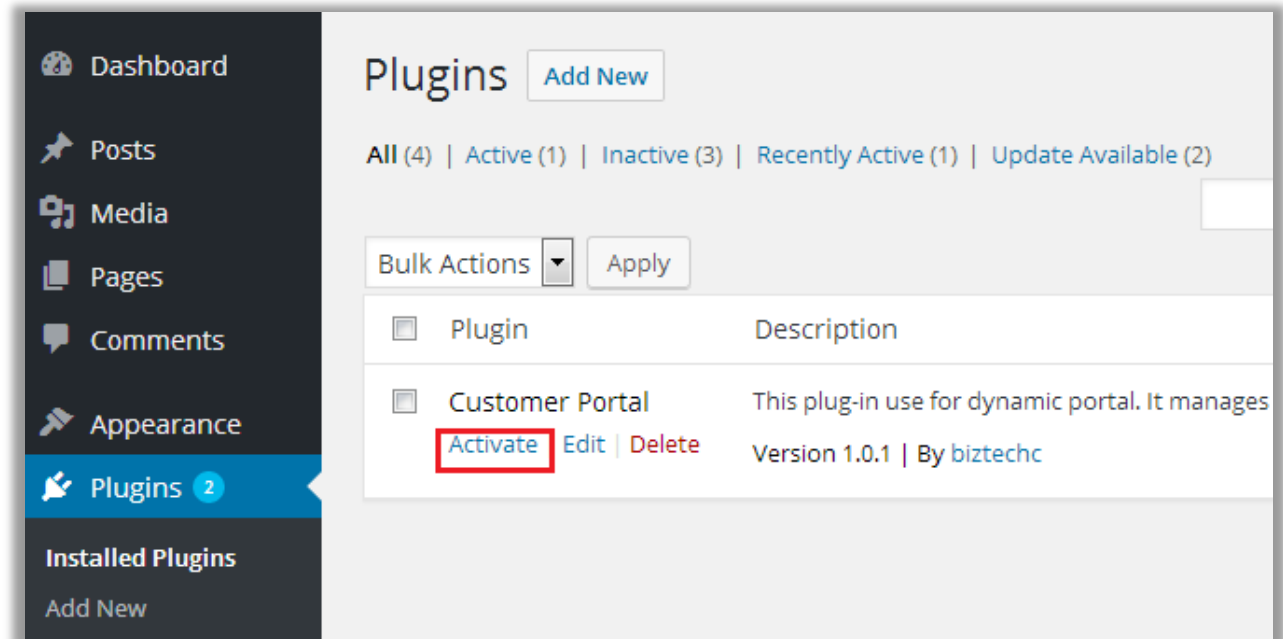


- To upload the plugin, click on **'Upload Plugin'** button.





- 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.

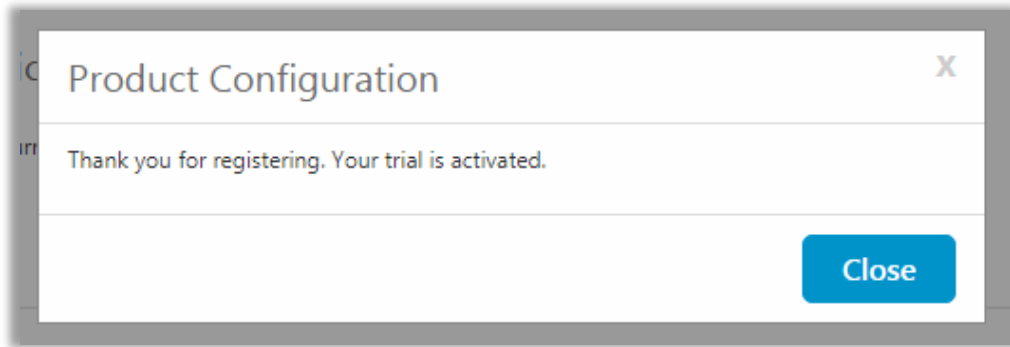
## Activate your plug-in

- 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.

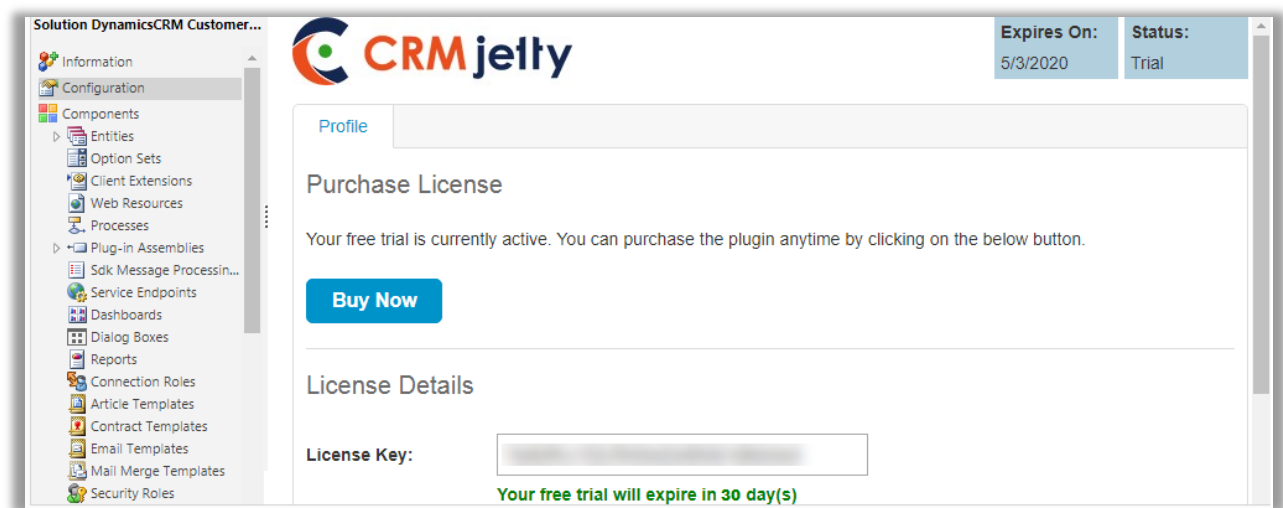
The screenshot shows a web application interface for activating a free trial. On the left is a sidebar menu with categories like Information, Configuration, Components, and Plug-in Assemblies. The main area has a header with the CRMjetty logo and status boxes for 'Expires On' and 'Status: Unregistered'. Below the header, the 'Profile' tab is active, showing a form titled 'Activate Your Free Trial'. The form contains input fields for 'First Name\*' (filled with 'Renley'), 'Last Name\*' (filled with 'Snow'), and 'Email\*'. A blue 'Activate' button is at the bottom right. A link to 'CRMJetty Support' is provided for queries.

- 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.

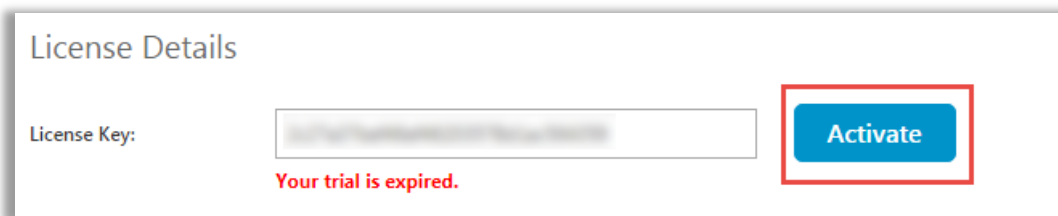


### Purchase License Key

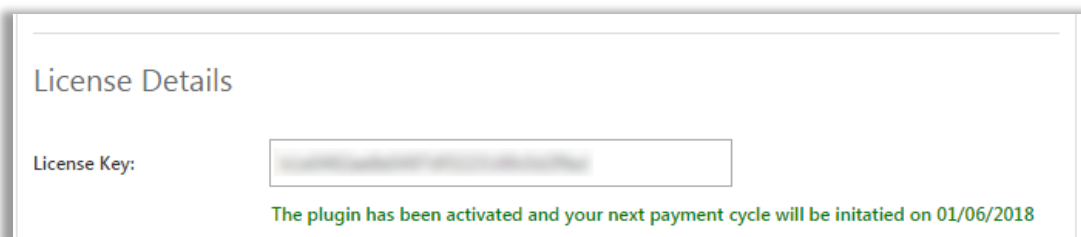
- On expiration of Trial a message will appear that the Trial is expired. Now to purchase the license click on 'Buy Now' button.



- 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.

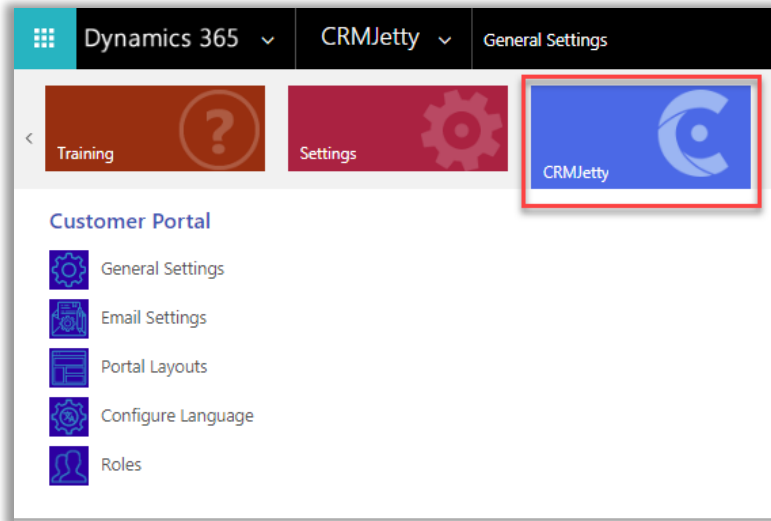


- Enter the New License key received on mail. This will enable the 'Activate' button.
- Click on 'Activate' button to activate your license.



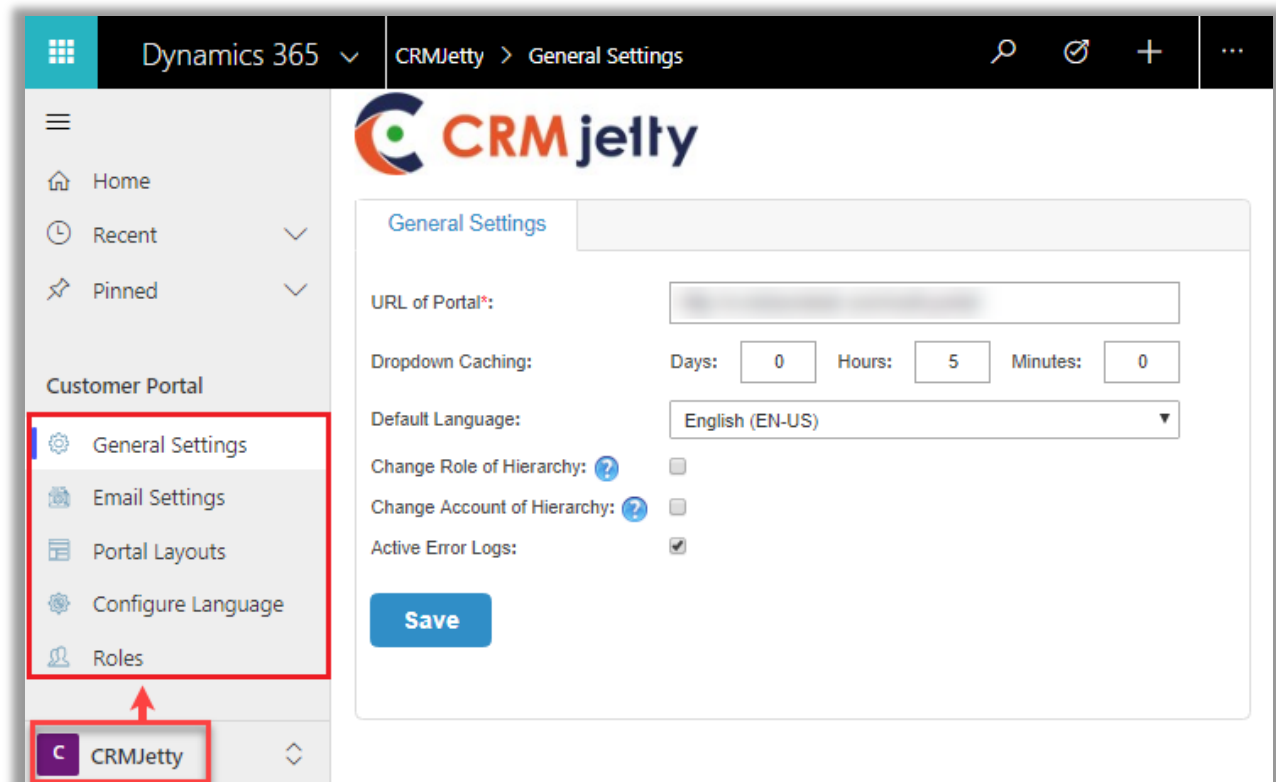
## USER MANUAL: Dynamics CRM Customer Portal for WordPress

- 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



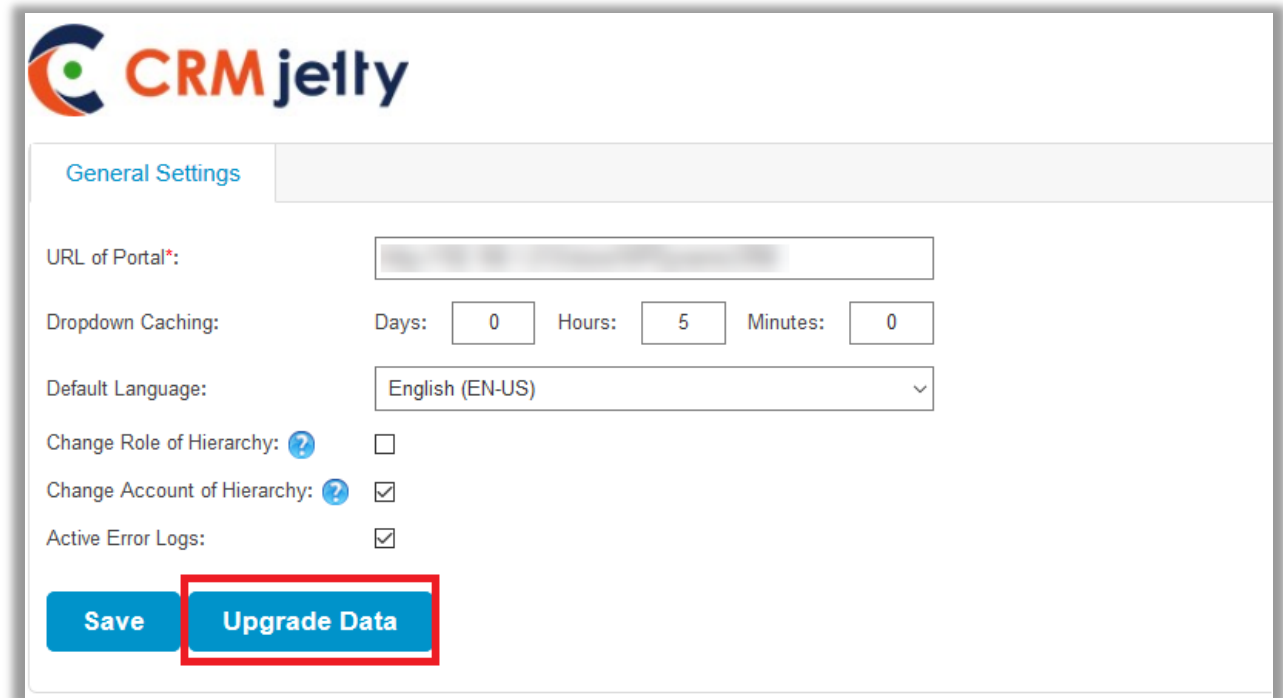
OR

- For 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.



The screenshot shows the CRMjetty General Settings interface. At the top is the CRMjetty logo. Below it is a tab labeled 'General Settings'. The settings include:

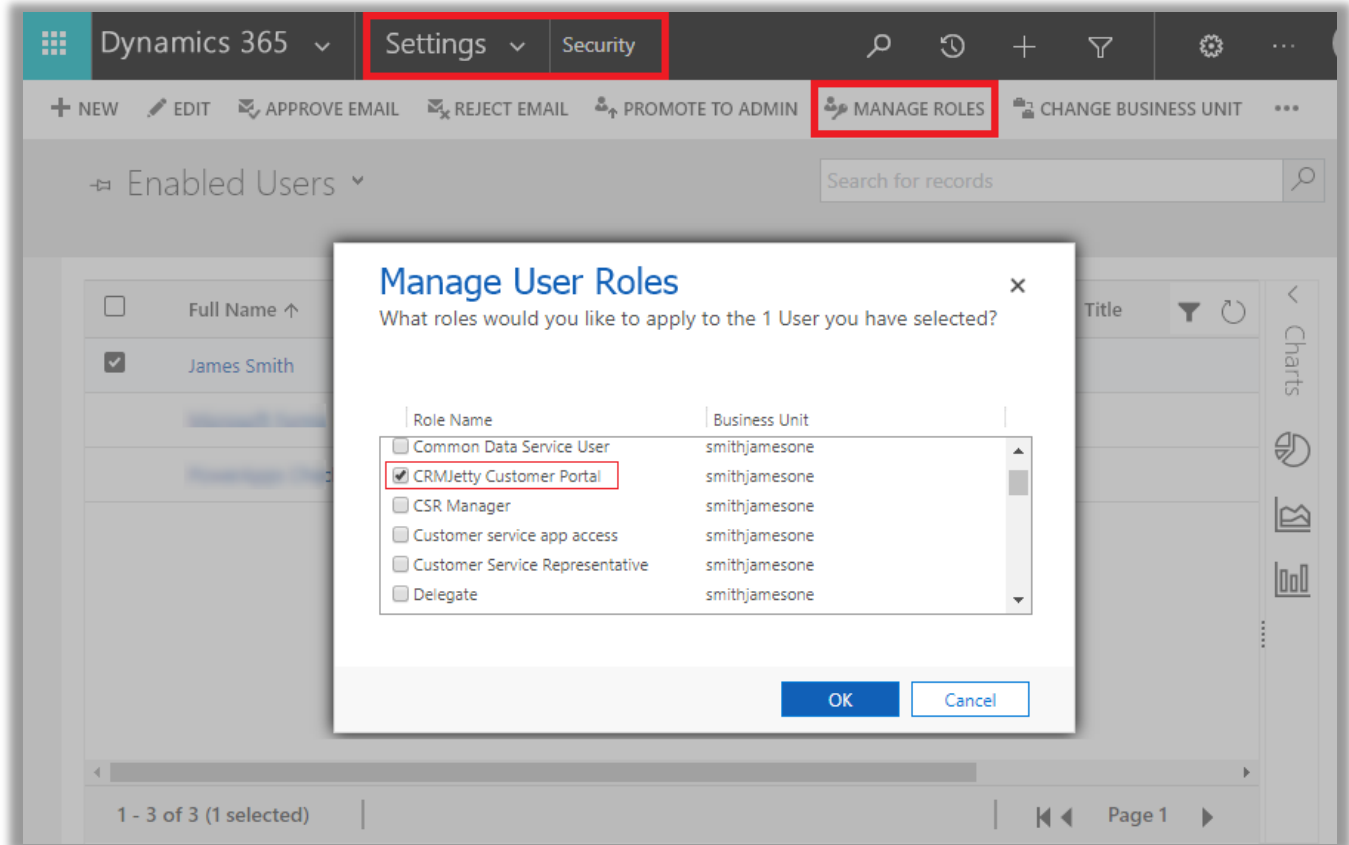
- URL of Portal\*: A text input field.
- Dropdown Caching: Days: 0, Hours: 5, Minutes: 0.
- Default Language: A dropdown menu showing 'English (EN-US)'.
- Change Role of Hierarchy: ? ☐
- Change Account of Hierarchy: ? ☒
- Active Error Logs: ☒

At the bottom are two buttons: 'Save' and 'Upgrade Data'. The 'Upgrade Data' button is highlighted with a red rectangular box.

- 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

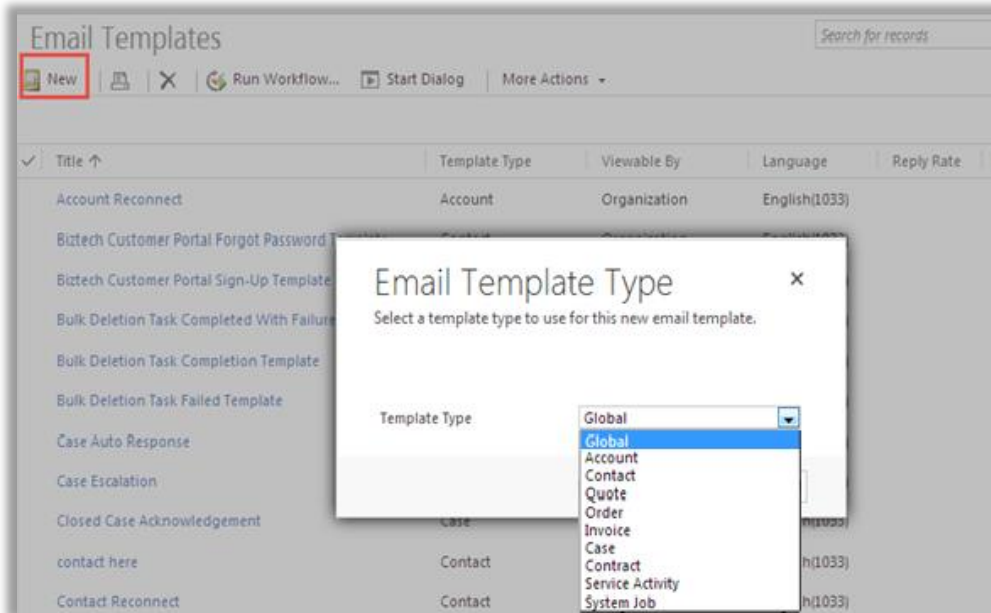
- To manage the user roles, navigate to **Settings** → **Security** → **Users**.
- Now select the users whose roles are to be managed and click on **'MANAGE ROLES'**. This will open a pop up to select roles.
- To access CRMJetty product entities assign **'CRMJetty Customer Portal'** role to selected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

**Email Template: New Email Template** Working on solution: Default Solution

**Details**

Type \* **Contact Template** Language **English**

\*Title **Biztech Customer Portal Sign-Up From Portal Template**

Description

Subject \* **WordPress Dynamics Customer Portal Sign-Up<!-->**

Hi **{!Contact:Full Name;}**,

Congratulations! Welcome to Portal. We are happy to inform you that your Account has been created in Portal.

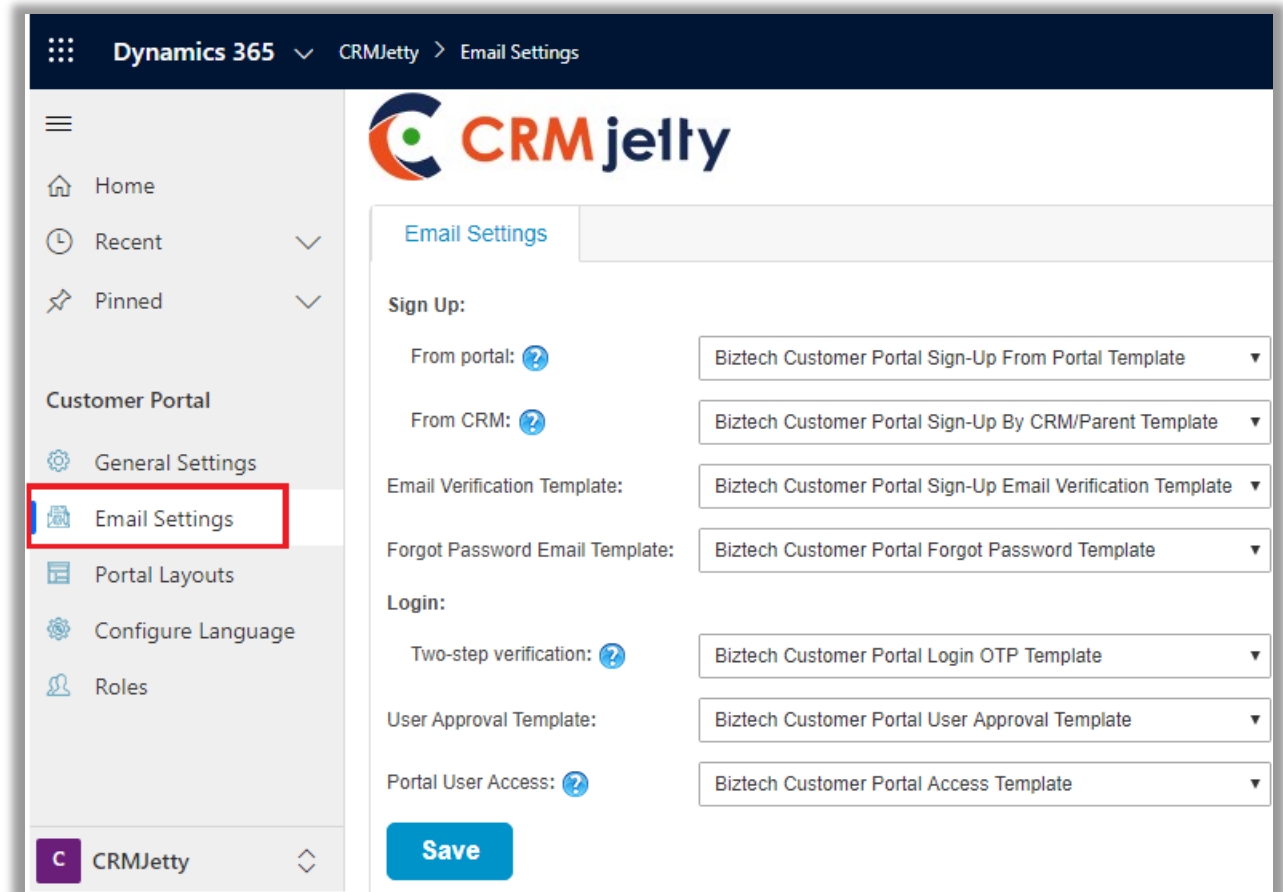
Your user name is:

Username: **{!Contact:Username;}**

Thank you.

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

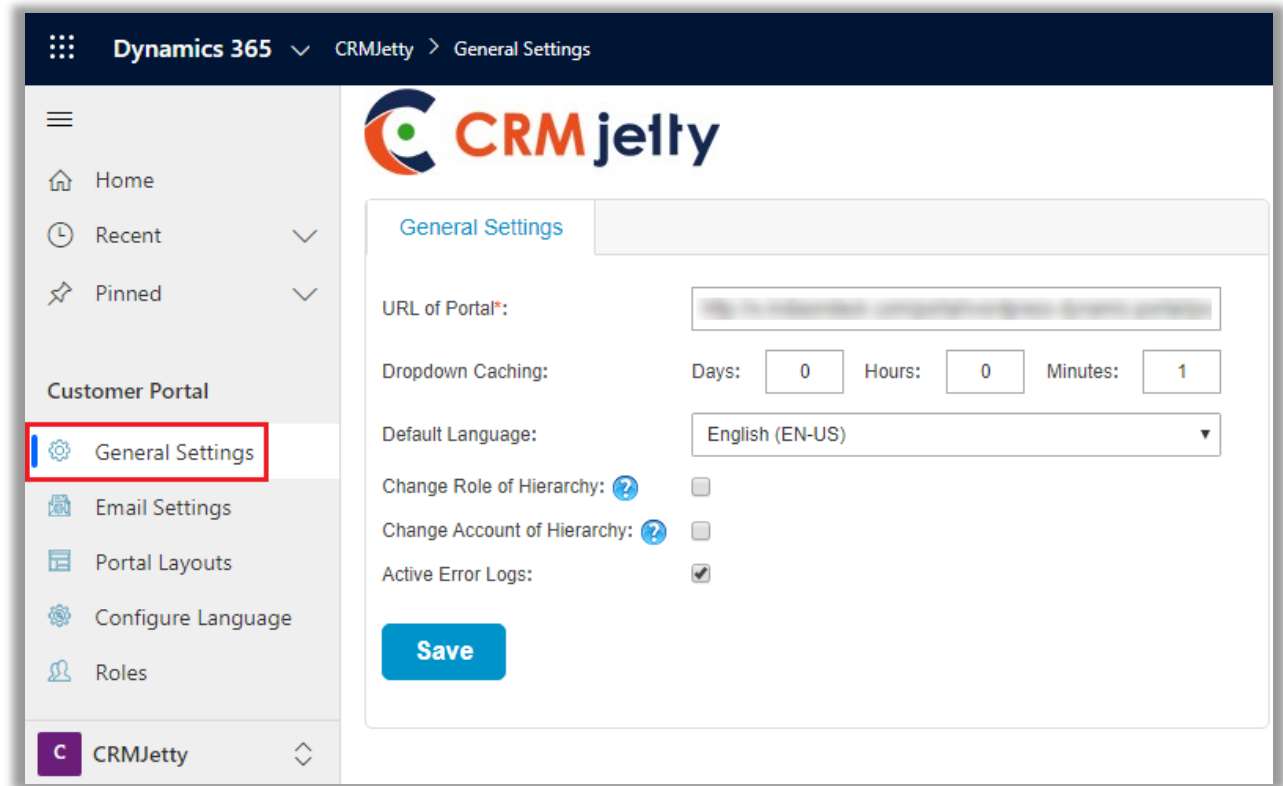
- For assigning the default email template, navigate to **CRMJetty → Email Settings**.



- 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.

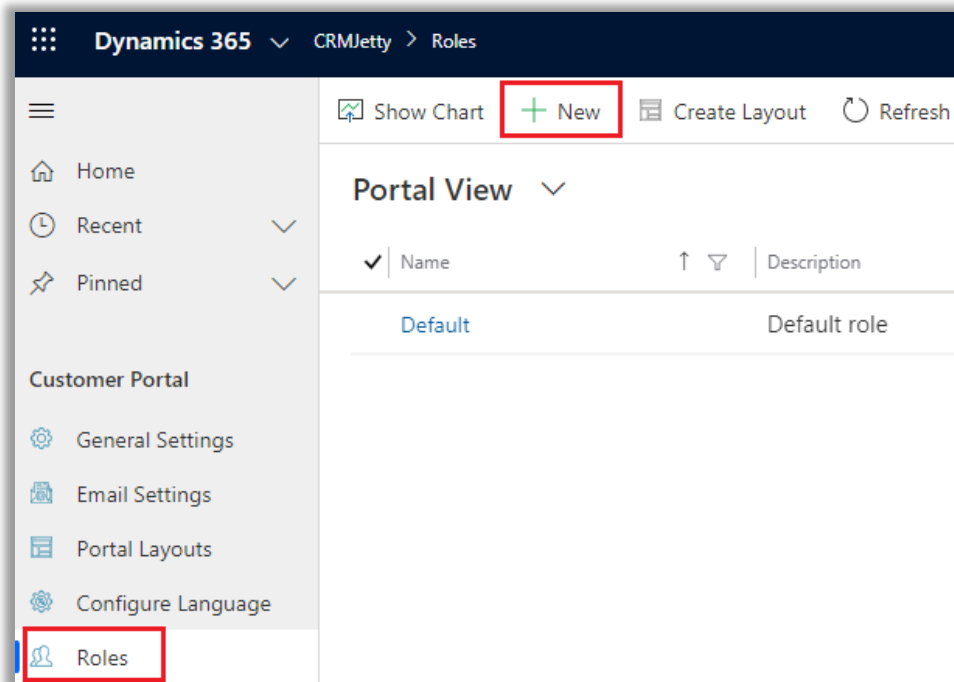


- By enabling the **Change Role of Hierarchy** check box, you can change role of hierarchy. *i.e.* If role of any contact is updated or removed, it will be applied to the whole child hierarchy.
- By enabling the **Change Account of Hierarchy** check box, you can change account of hierarchy. *i.e.* If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



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

### Roles

**Role Name\***

Customer

**Is Active**

True

**Is Default**

True

**Description**

Description

Accessible Modules

Module Name	Status	Create	Edit	Delete
Account	Enable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment	Enable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Article	Disable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case	Enable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Entitlement	Enable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Invoice	Enable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Knowledge Article	Enable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Note	Enable	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Order	Enable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone Call	Enable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product	Enable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quote ?	Enable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Note:**

- By default, '**Default**' group will be assigned to a newly created contact record.
- Access rights of default user group cannot be changed.

- 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.

**Roles**

**Role Name\*** PortalManager

**Is Active** True

**Is Default** False

**Description** Portal Manager

**Accessible Modules** +

**Advance Settings** -

**Case Deflection ?** Enable

**Select Entity\*** All selected (2)

**Article Subject\*** 2 selected

**Calendar ?** Enable

**Manage Articles** Add Articles

Update

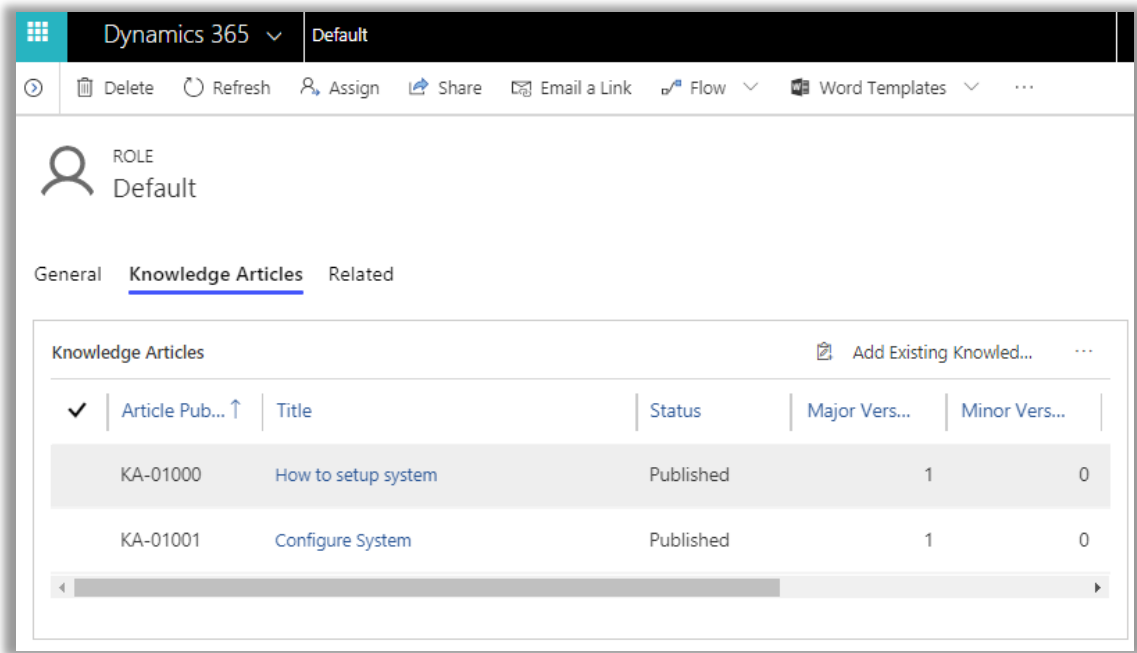
- It will search a solution for the enabled **Case Deflection subject** (which belongs to articles or Knowledge articles categories of CRM). So, on enabling "Case deflection" option, you will be setting entity and respective categories to be searched from; while the portal user looks for a solution.

**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.

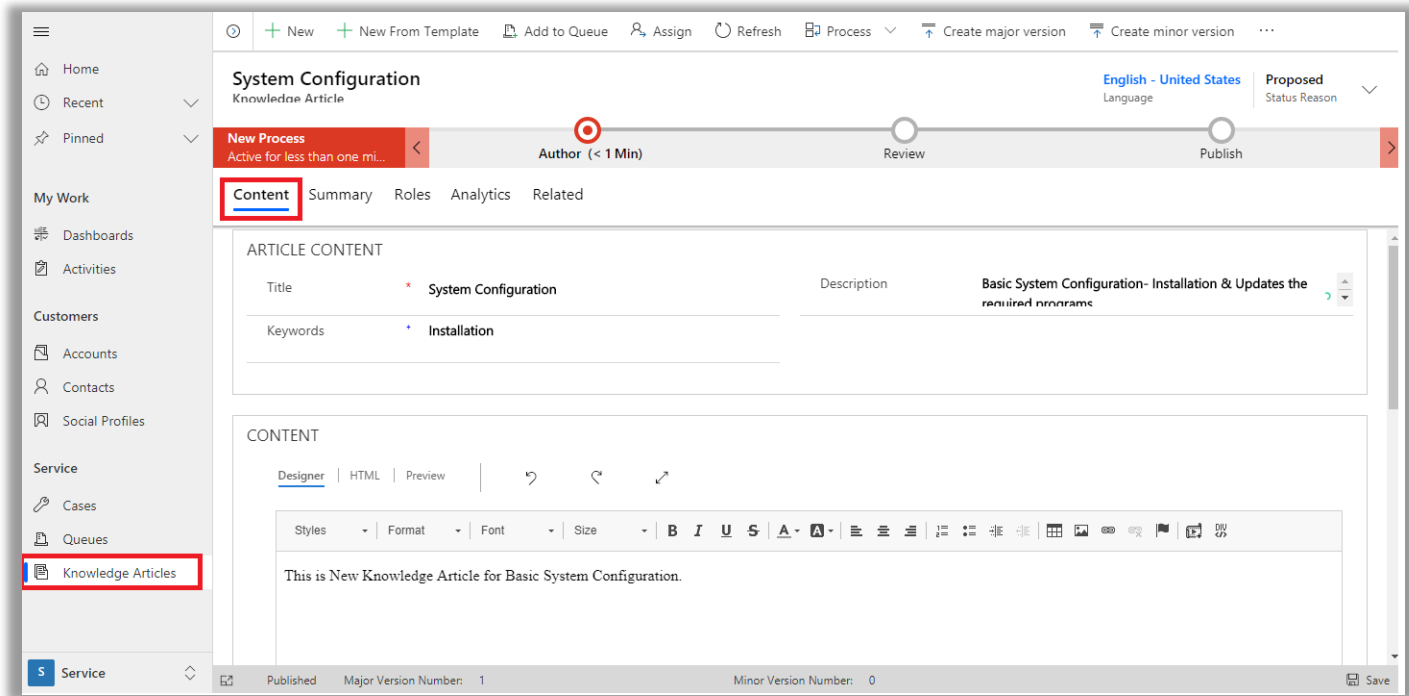
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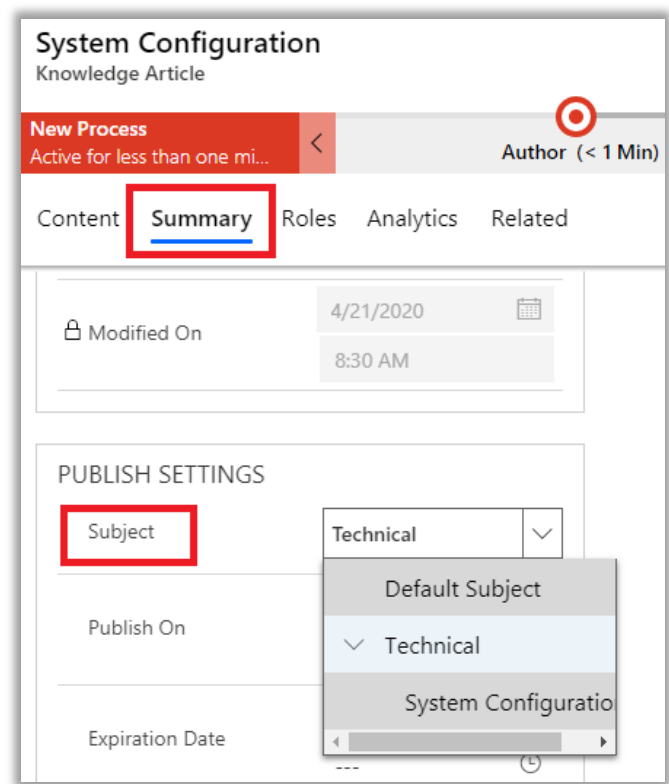
- For adding articles either for article entity or knowledge article entity navigate to role page and click on ‘Add Article’ button.



OR

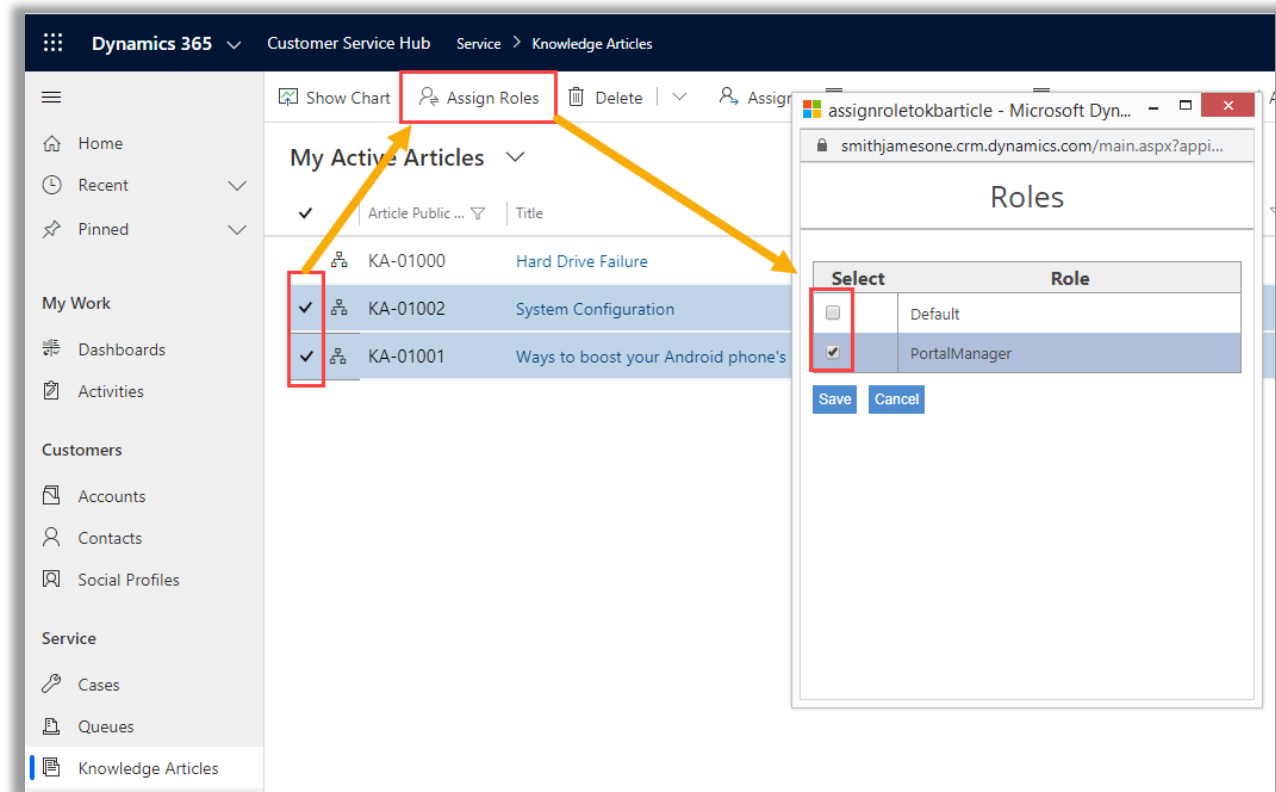
- For Unified Interface.





- 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.

Note: To access article entity navigate to classic interface.

Advance Settings

Case Deflection ?

Enable

Select Entity\*

Knowledge Article

Article Subject\*

Default Subject

Calendar ?

Enable

Manage Articles

Add Articles

Update

## 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.

**Portal Layout Setting**

Role: Default Module: Case

☐ Set Registration Layout ☐ Set Contact Layout

Edit View Detail View List View

Save Cancel

**New Panel**

**New Row**

Resolve By KPI

Product

Origin

Resolve By

Is Escalated

Contract

Sentiment Value

Knowledge Base Article

Influence Score

Contract Line

Blocked Profile

First Response Sent

**Edit View**

☐ Copy to Detail View

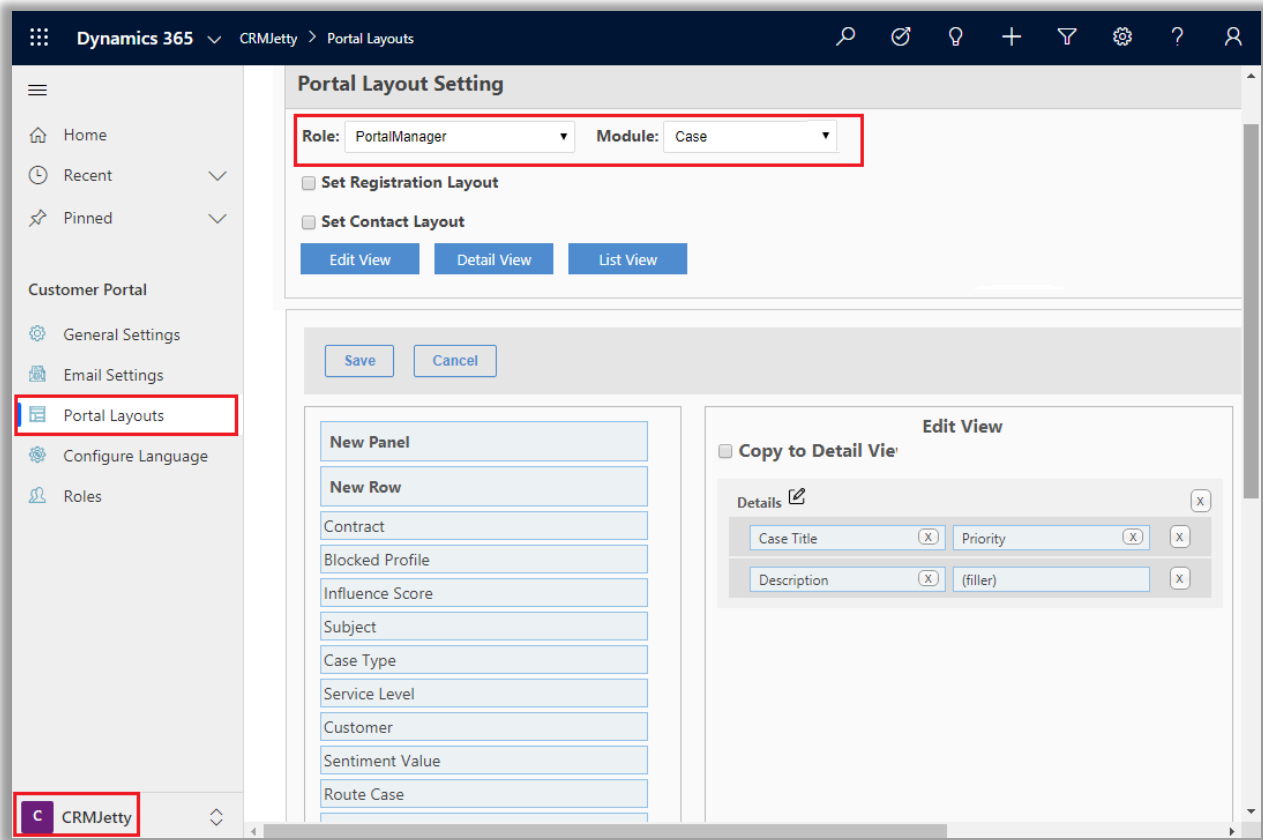
**Details**

Case Title	Priority	Description
		(filler)

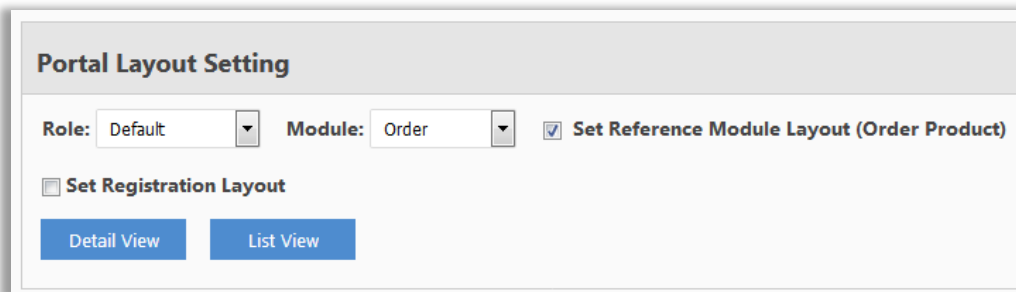
- To set Portal layouts click on '**Portal Layout**' button. This will open up Portal Layout Settings Page in a new window.

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 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'**.

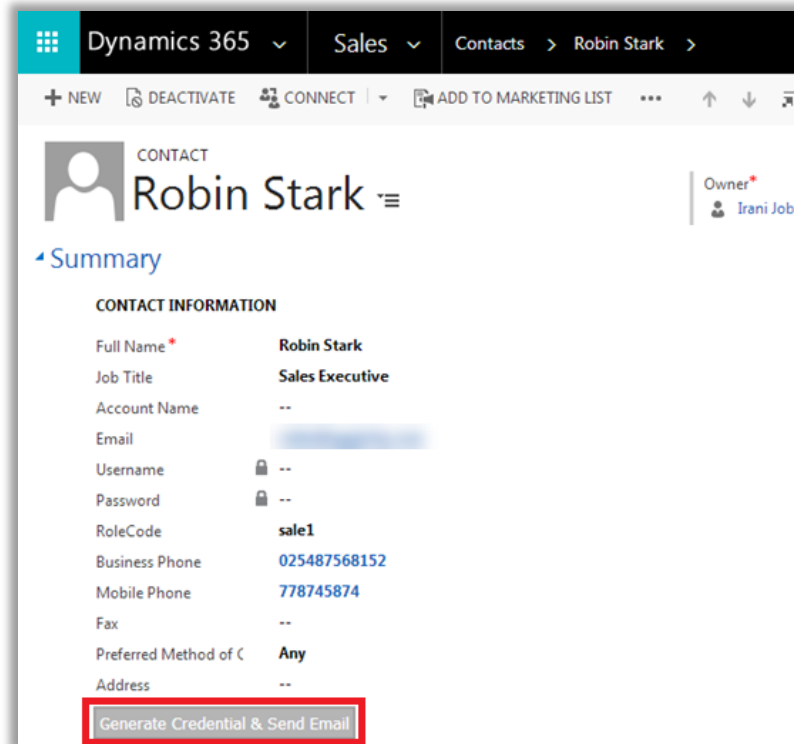


- You can also set Detail view layout for reference module. A check box will appear on selecting a module that has reference module associated to it. Check the box to set Detail view layout for reference modules.

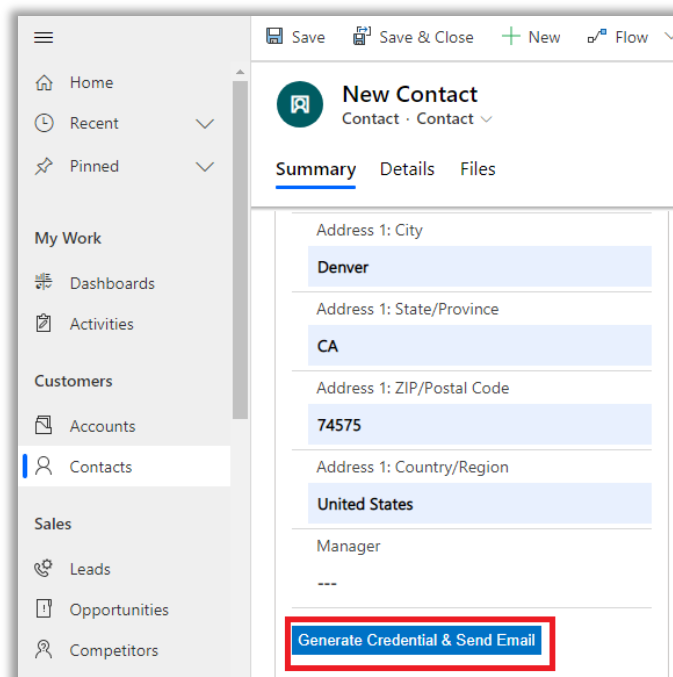


## Generating Portal Credentials

- 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.

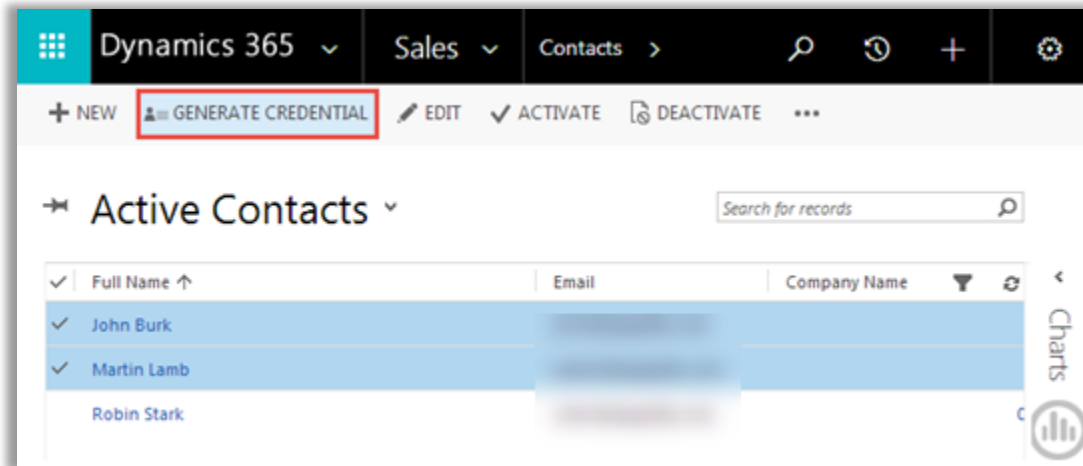


- For Unified View,



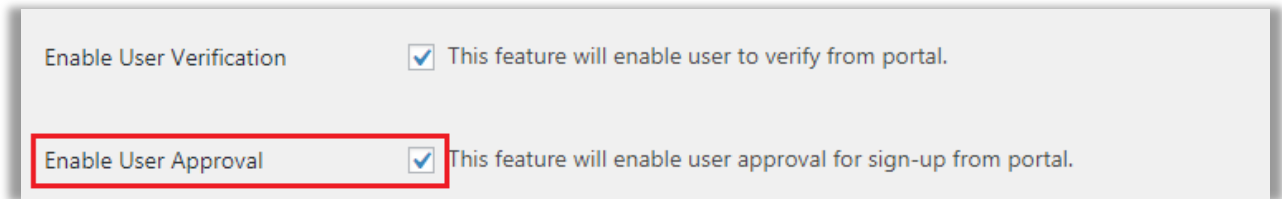
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- To **mass generate** portal credentials for CRM contacts, navigate to Contacts module and select the contact records for which you want to generate credentials.
- Now, click on '**GENERATE CREDENTIAL**' button. This will generate username for all 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.

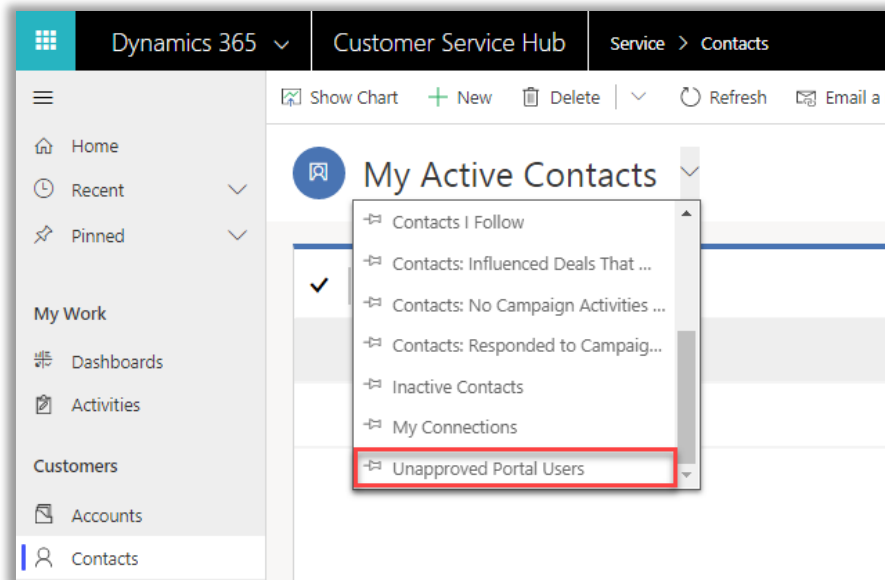


## Approval & Verification for Portal Users

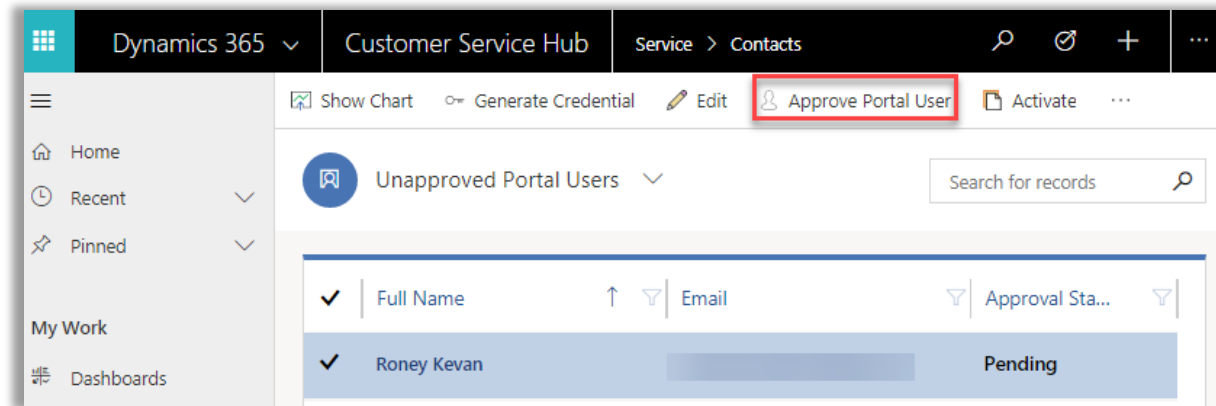
- If you want to provide access of portal to specific people approved by admin, then navigate to **WordPress Admin Panel** → **Customer Portal Settings** Page.
- Tick the checkbox to **Enable User Approval** flow.



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



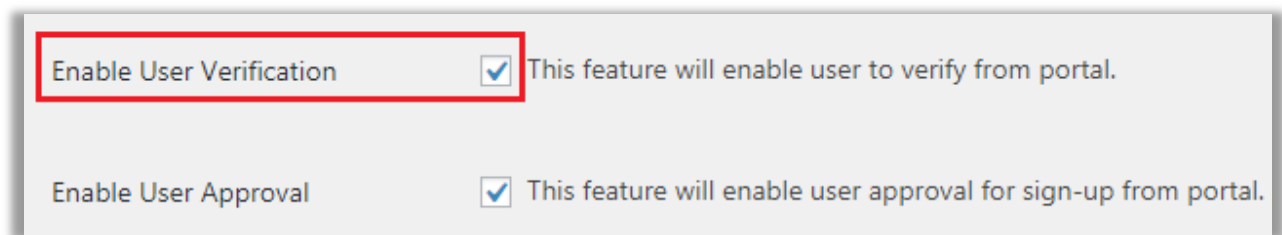
- Now you can filter contacts and get the list of pending contacts for approval by clicking on **Unapproved Portal Users**.
- To approve contacts, select such contacts from the filtered contacts list view and click on the 'Approve Portal User' button.



- 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.



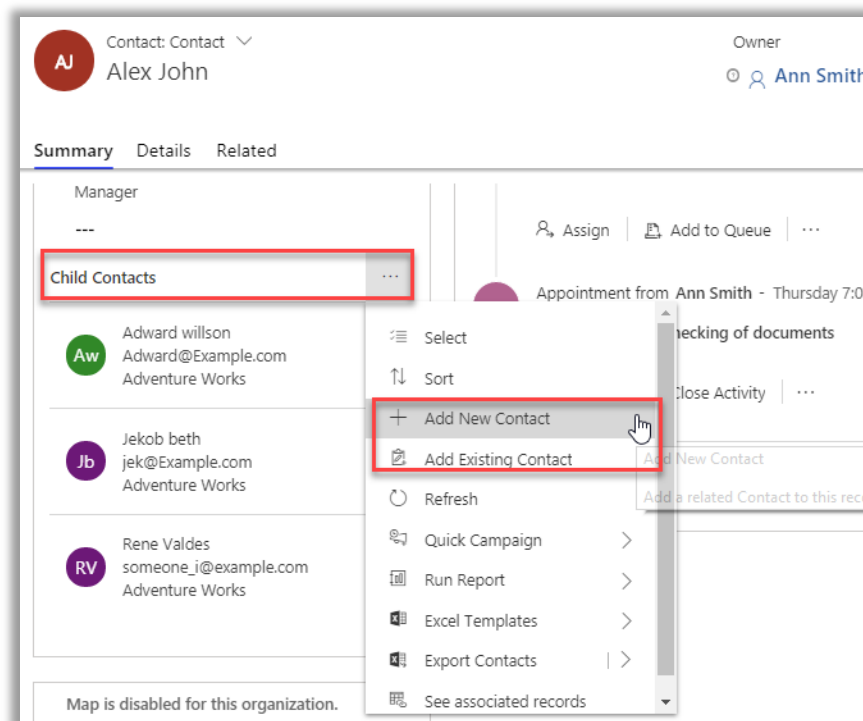
## Field Configuration

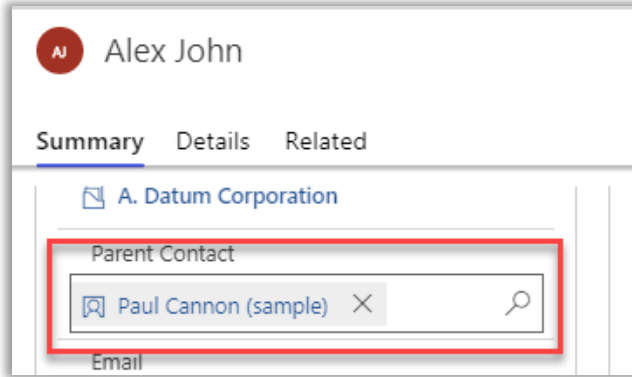
- For assigning any record to a particular portal user from CRM or to view the user in CRM to whom a record is assigned from portal, you need to configure some fields in CRM.
- Each module should have the below fields in its form. If no such field exists, then you need to add a field from **Form Editor**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

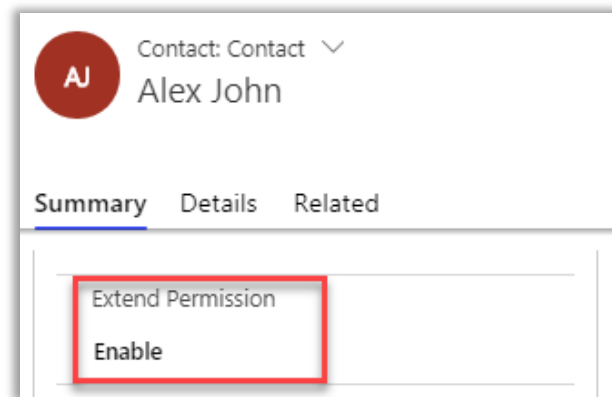
- For assigning child records to any parent record, navigate to detail view of contact entity.





- 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.



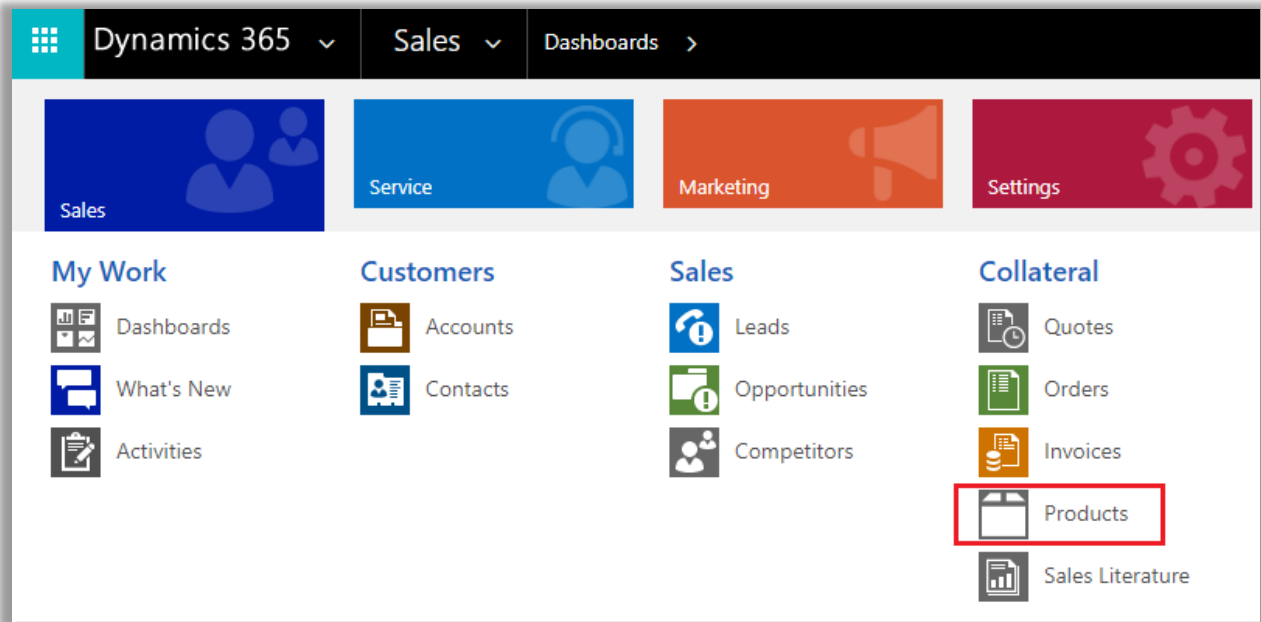
- This permission allows portal user to the create contact and generate credentials, enable/disable portal access for direct next level of child (i.e. one level of child) contacts.
- They can also view the details of entity records of the whole hierarchy.

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

## Product Modules

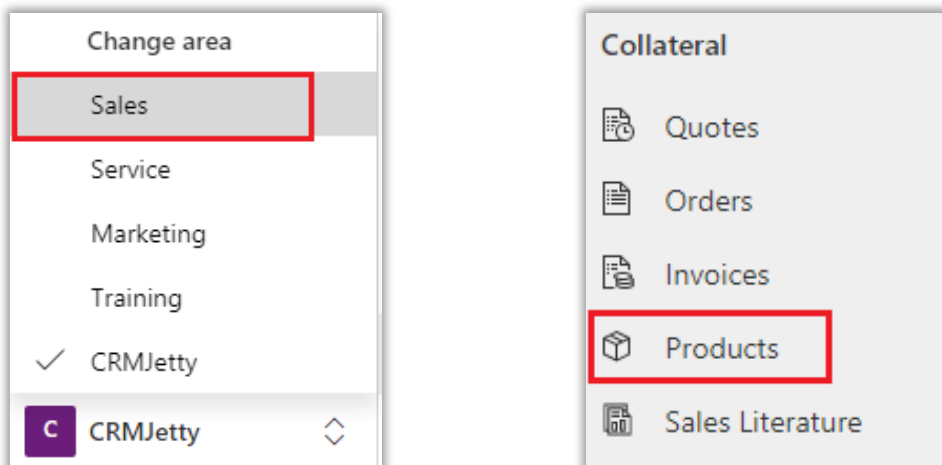
If you are using **Classical view**:

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



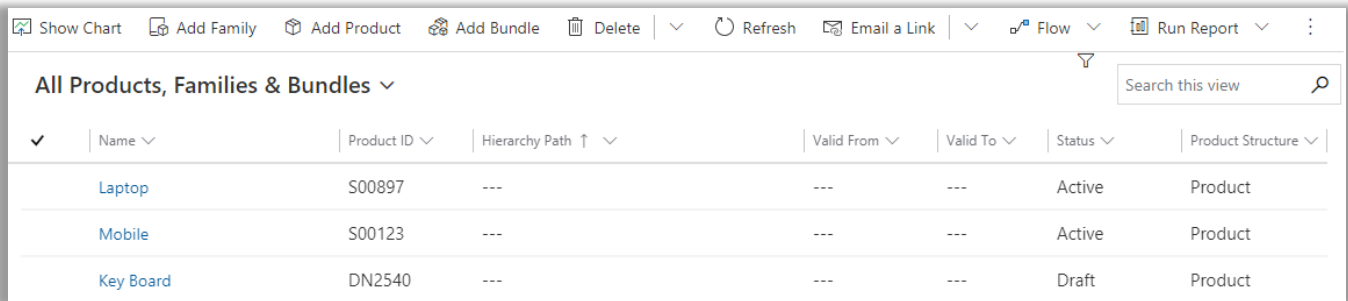
If you are using **Unified Interface**:

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



## USER MANUAL: Dynamics CRM Customer Portal for WordPress

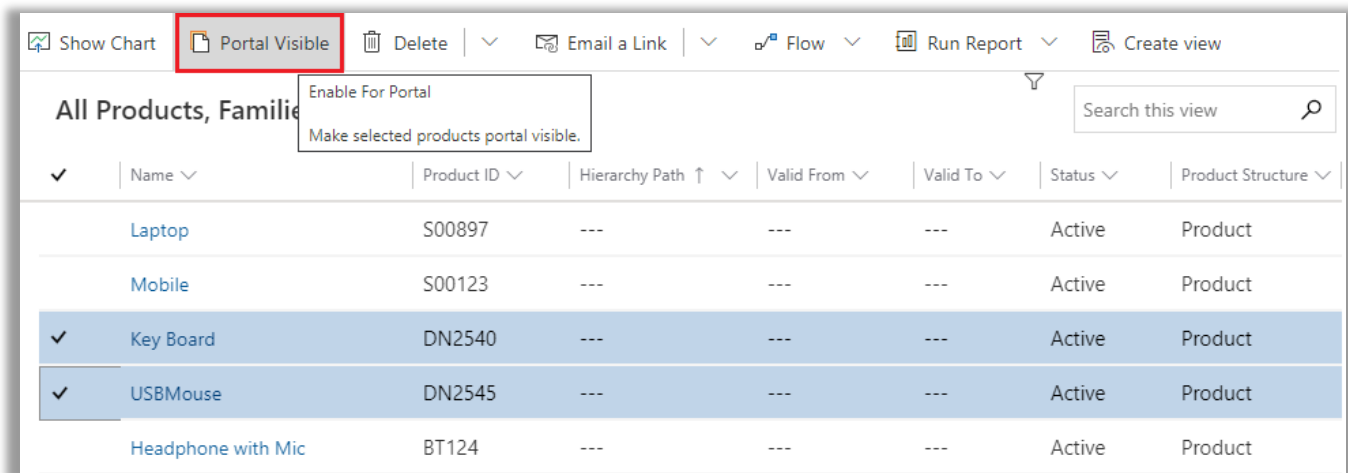
- After clicking on the Product, navigate to product's list page. Here you can see the details of the product with its status and Structure.



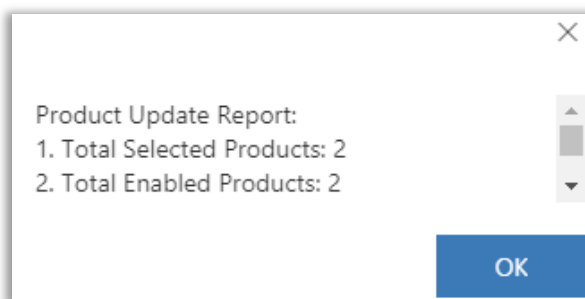
✓	Name	Product ID	Hierarchy Path	Valid From	Valid To	Status	Product Structure
	Laptop	S00897	---	---	---	Active	Product
	Mobile	S00123	---	---	---	Active	Product
	Key Board	DN2540	---	---	---	Draft	Product

### 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.



✓	Name	Product ID	Hierarchy Path	Valid From	Valid To	Status	Product Structure
	Laptop	S00897	---	---	---	Active	Product
	Mobile	S00123	---	---	---	Active	Product
✓	Key Board	DN2540	---	---	---	Active	Product
✓	USBMouse	DN2545	---	---	---	Active	Product
	Headphone with Mic	BT124	---	---	---	Active	Product



- 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.

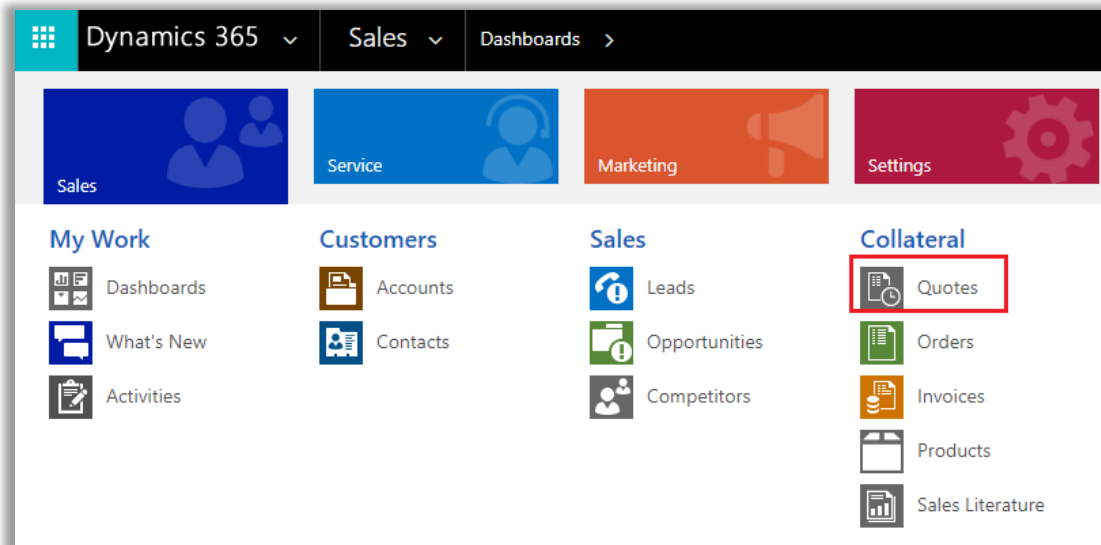
• **Note:** Family typed products are not supported in the Portal.



## Quote Module

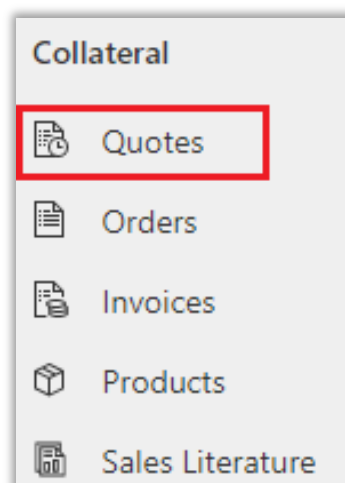
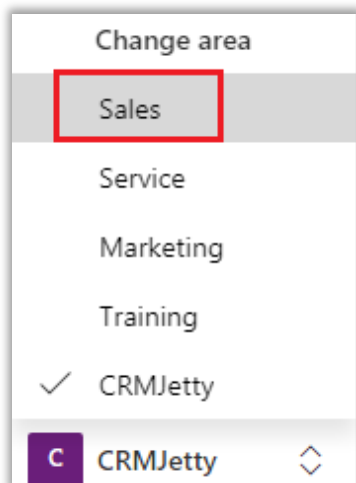
If you are using **Classical view**:

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



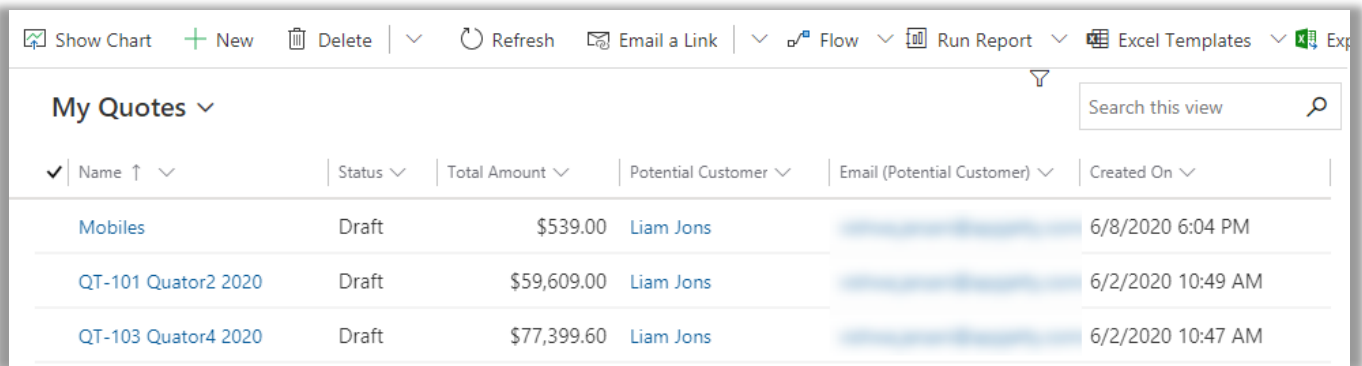
If you are using **Unified Interface**:

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



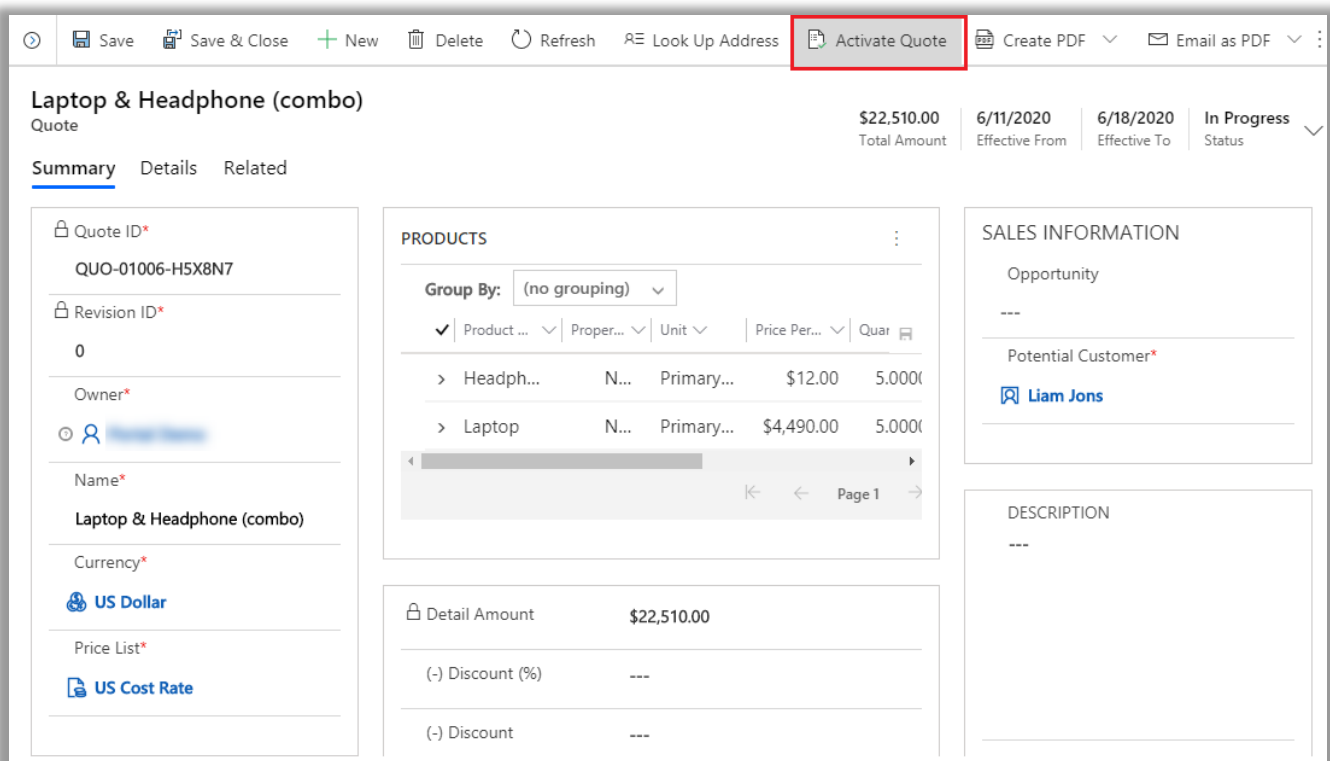
## USER MANUAL: Dynamics CRM Customer Portal for WordPress

- 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.



My Quotes ▾						
Search this view 🔍						
✓	Name ↑ ▾	Status ▾	Total Amount ▾	Potential Customer ▾	Email (Potential Customer) ▾	Created On ▾
	Mobiles	Draft	\$539.00	Liam Jons		6/8/2020 6:04 PM
	QT-101 Quator2 2020	Draft	\$59,609.00	Liam Jons		6/2/2020 10:49 AM
	QT-103 Quator4 2020	Draft	\$77,399.60	Liam Jons		6/2/2020 10:47 AM

- 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.



**Laptop & Headphone (combo)**  
Quote

**\$22,510.00** Total Amount    **6/11/2020** Effective From    **6/18/2020** Effective To    **In Progress** Status

Summary   Details   Related

Quote ID\*  
QUO-01006-H5X8N7

Revision ID\*  
0

Owner\*  
Liam Jons

Name\*  
Laptop & Headphone (combo)

Currency\*  
US Dollar

Price List\*  
US Cost Rate

**PRODUCTS**

Group By: (no grouping) ▾

✓	Product ... ▾	Proper... ▾	Unit ▾	Price Per... ▾	Quar ▾
>	Headph...	N...	Primary...	\$12.00	5.0000
>	Laptop	N...	Primary...	\$4,490.00	5.0000

Detail Amount: \$22,510.00

(-) Discount (%): ---

(-) Discount: ---

**SALES INFORMATION**

Opportunity  
---

Potential Customer\*  
Liam Jons

**DESCRIPTION**

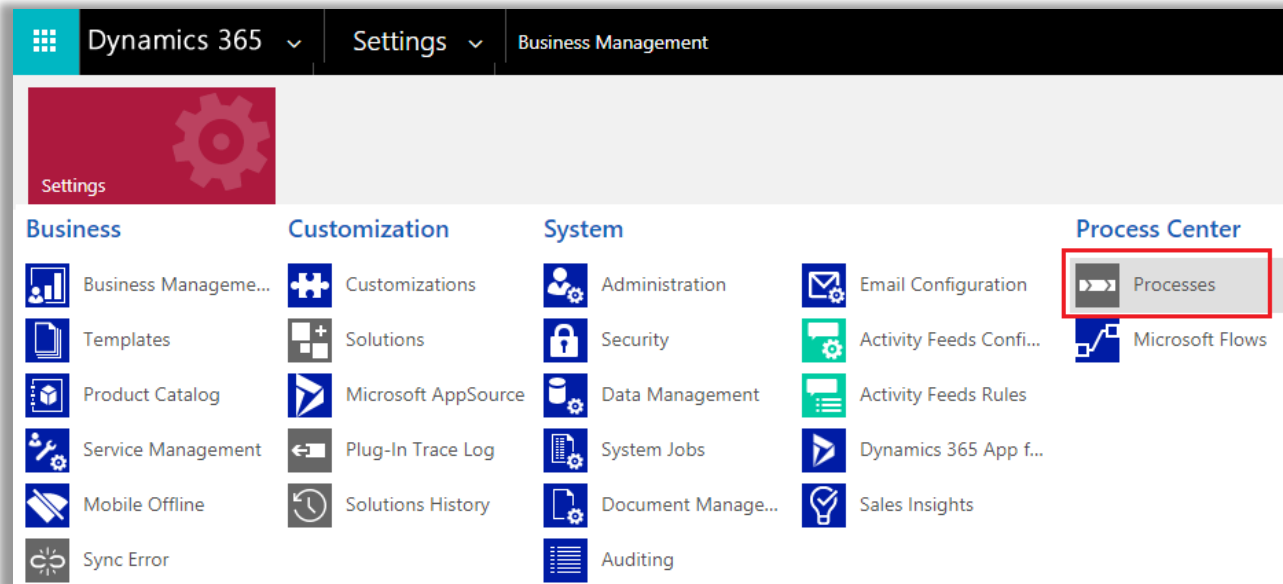
---

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

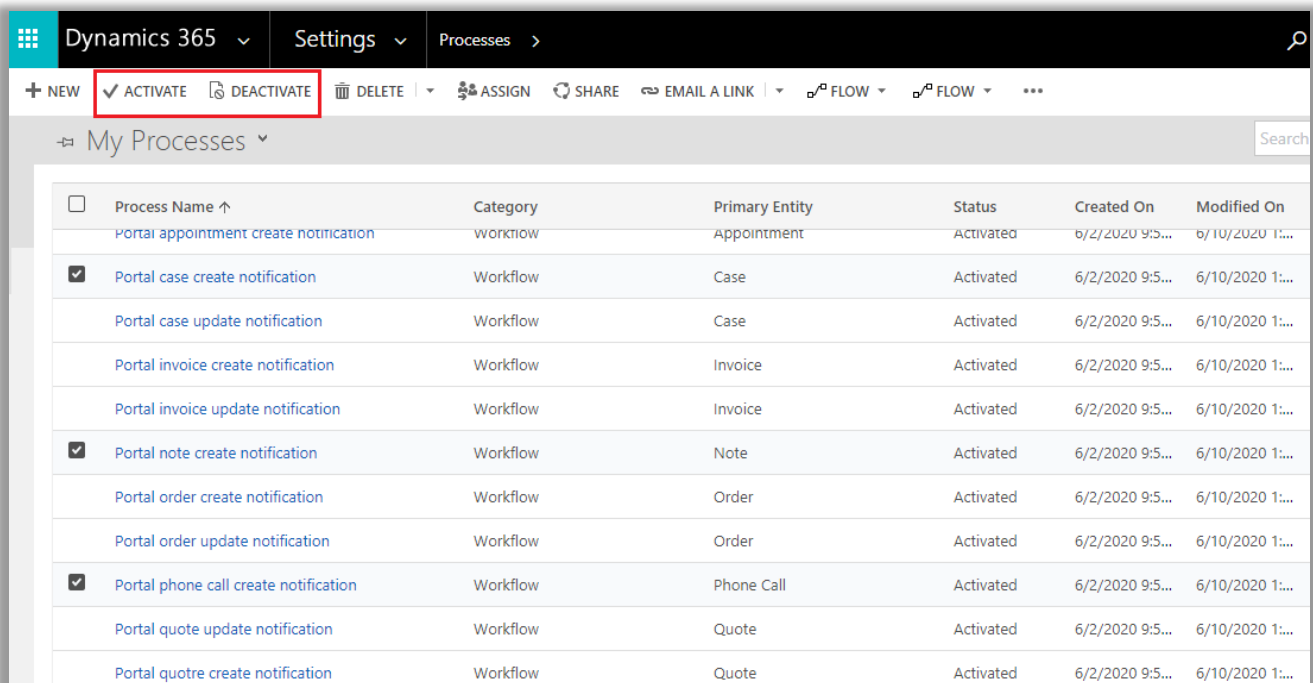
## Email Notifications

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**.

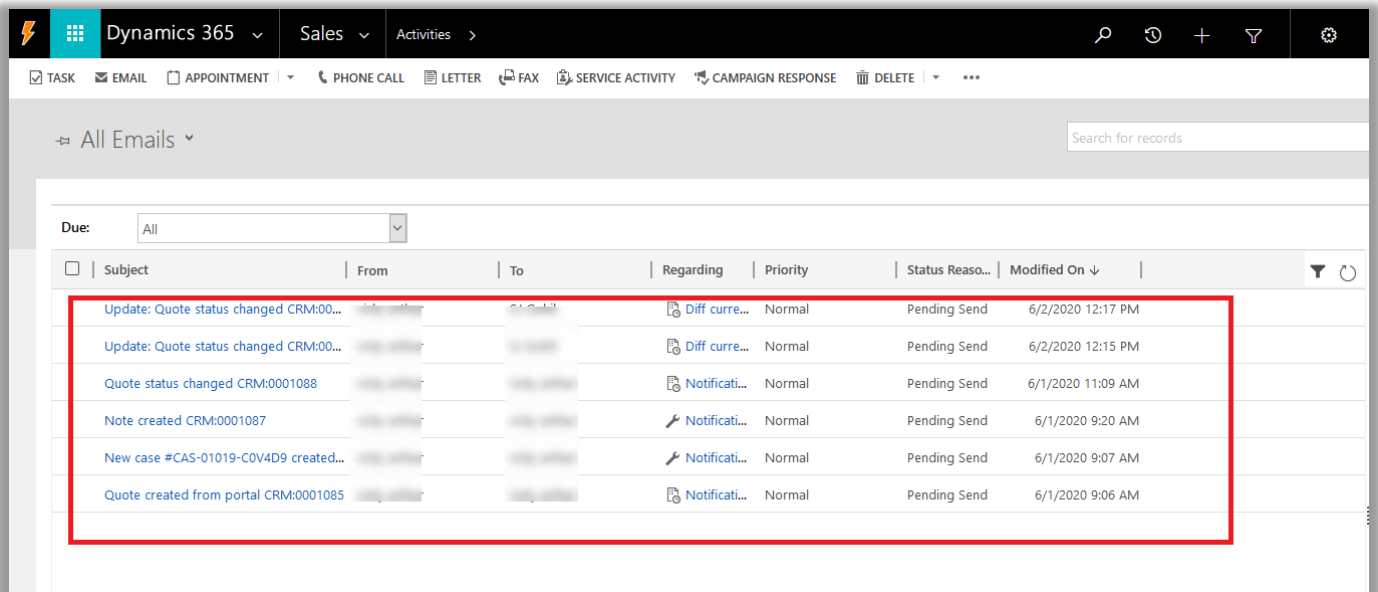


- By clicking on the “Processes”, you will be navigated to My Processes page. Select the Processes for which you want to get the email notifications.



## USER MANUAL: Dynamics CRM Customer Portal for WordPress

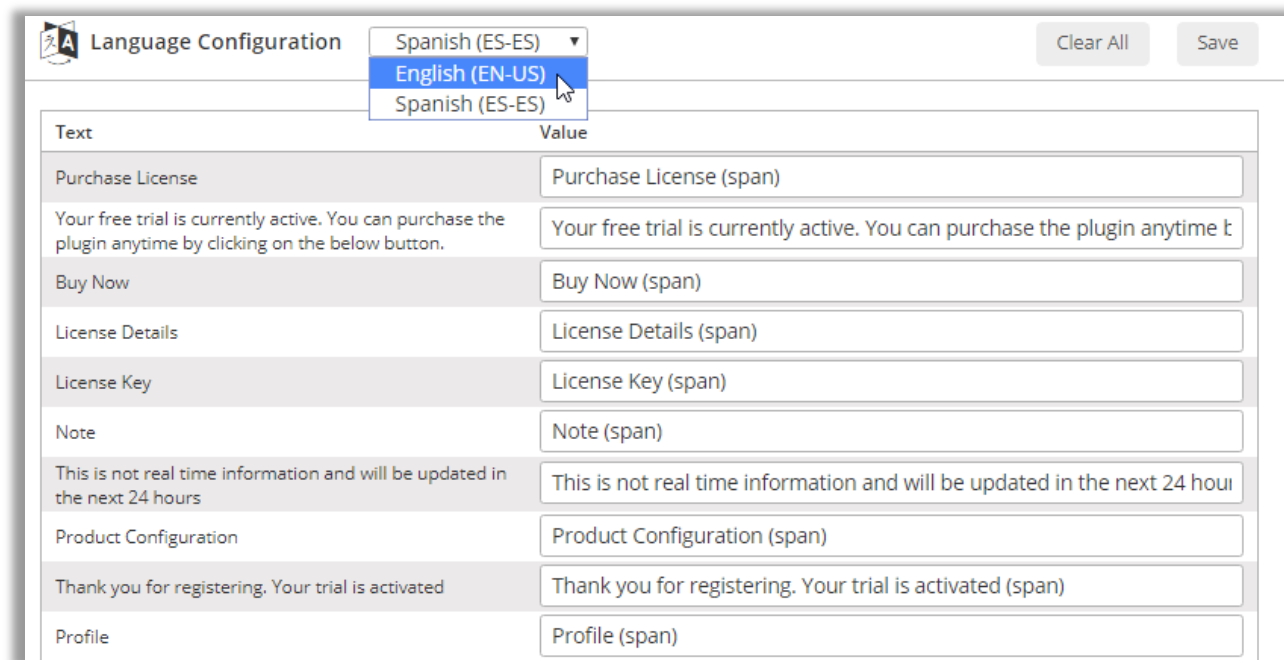
- You can enable notifications for below actions; for the Porta User:
  - New case creation
  - Case status change
  - Note creation
  - Order creation
  - Order status change
  - Quote creates
  - Quote status changed
  - Invoice creates
  - Invoice status changed
  - Phone call created
  - Appointment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



Text	Value
Purchase License	Purchase License (span)
Your free trial is currently active. You can purchase the plugin anytime by clicking on the below button.	Your free trial is currently active. You can purchase the plugin anytime by clicking on the below button.
Buy Now	Buy Now (span)
License Details	License Details (span)
License Key	License Key (span)
Note	Note (span)
This is not real time information and will be updated in the next 24 hours	This is not real time information and will be updated in the next 24 hours
Product Configuration	Product Configuration (span)
Thank you for registering. Your trial is activated	Thank you for registering. Your trial is activated (span)
Profile	Profile (span)

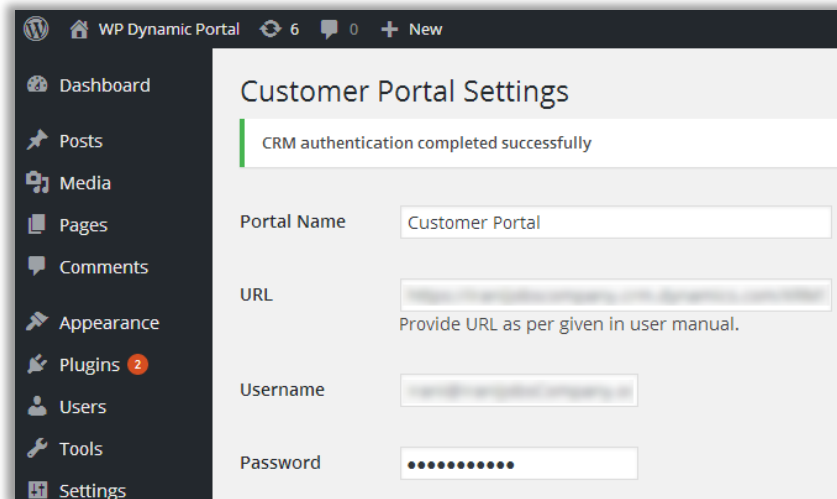
- Select language and add messages. It will be reflected on the portal when that language is changed by the portal user.

**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.

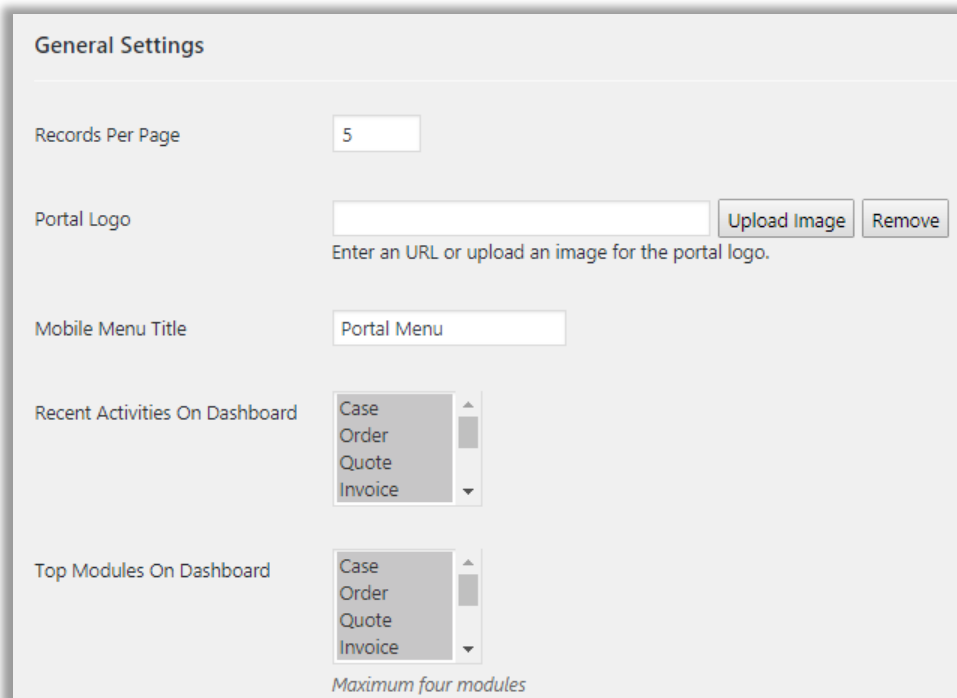
## WordPress Configuration Settings

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



The screenshot shows the WordPress admin interface with the 'Customer Portal Settings' page. The left sidebar contains navigation links: Dashboard, Posts, Media, Pages, Comments, Appearance, Plugins (2), Users, Tools, and Settings. The main content area is titled 'Customer Portal Settings' and displays a success message: 'CRM authentication completed successfully'. Below this, there are four input fields: 'Portal Name' (containing 'Customer Portal'), 'URL' (with a placeholder URL and a note 'Provide URL as per given in user manual.'), 'Username' (with a placeholder username), and 'Password' (masked with dots).

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



The screenshot shows the 'General Settings' page for the Customer Portal. It includes several configuration options: 'Records Per Page' (set to 5), 'Portal Logo' (with an 'Upload Image' button and a 'Remove' button, and a note 'Enter an URL or upload an image for the portal logo.'), 'Mobile Menu Title' (set to 'Portal Menu'), 'Recent Activities On Dashboard' (a list with 'Case', 'Order', 'Quote', and 'Invoice'), and 'Top Modules On Dashboard' (a list with 'Case', 'Order', 'Quote', and 'Invoice'). A note at the bottom states 'Maximum four modules'.

- 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.

The screenshot shows a settings interface with two main sections: 'Layout Settings' and 'Page Settings'. Under 'Layout Settings', there are three color selection options: 'Theme Color' (with a 'Select Color' button and a note to 'Clear theme color to restore default'), 'Calendar Phone Calls Color' (with a green color swatch and 'Select Color' button), and 'Calendar Appointments Color' (with a dark blue color swatch and 'Select Color' button'). Below these is a 'Portal Template' dropdown menu currently set to 'CRM Standalone Page'. The 'Page Settings' section contains five dropdown menus: 'Sign up Page' (Portal Sign Up), 'Login Page' (Portal Login), 'Profile Page' (Portal Profile), 'Forgot Password Page' (Portal Forgot Password), and 'Reset Password Page' (Portal Reset Password).

- 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.

**Advance Settings**

Enable Registration	<input checked="" type="checkbox"/> This feature will allow user to register from portal
Enable Email Verification	<input type="checkbox"/> This feature will enable email verification for portal users after registration.
Enable User Approval	<input type="checkbox"/> This feature will allow CRM admin to approve customer after registration.
Enable GDPR Consent	<input checked="" type="checkbox"/> This feature will enable GDPR consent for sign-up from portal.
Two - Step Authentication	<input checked="" type="checkbox"/> This feature will enable Two - Step Authentication for signin from portal.

- 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.

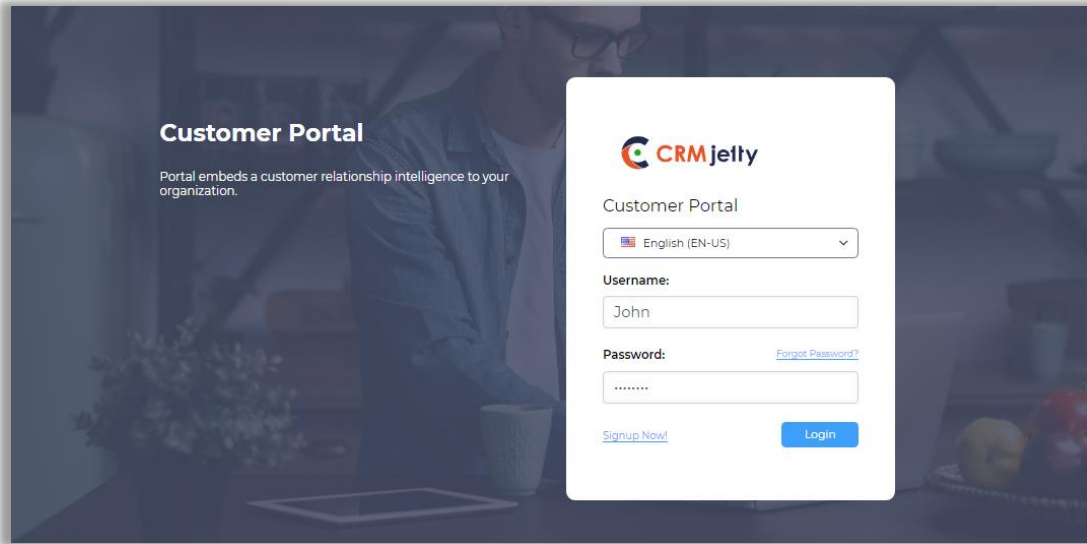


## Customer Portal (Front Side)

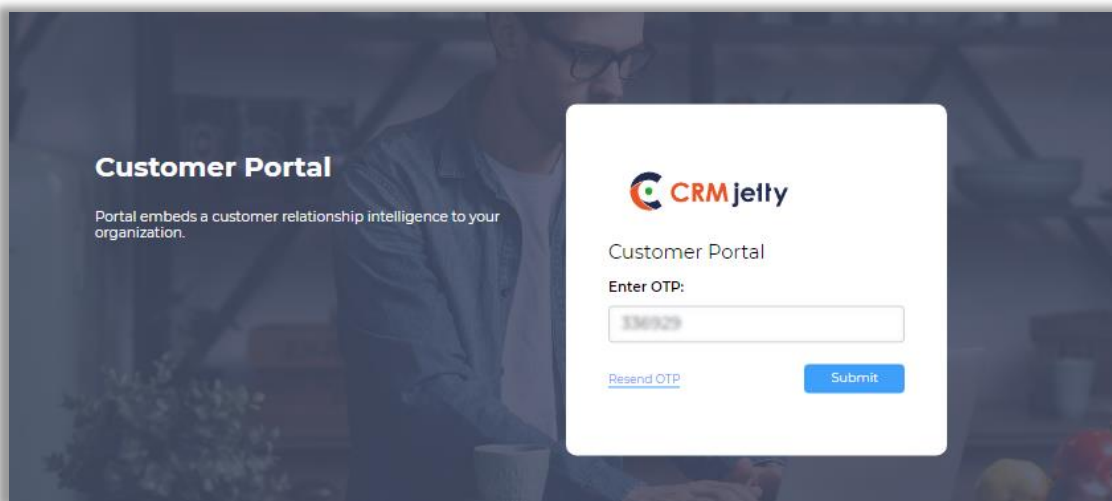
After completing all configurations at Dynamics CRM and WordPress portal for WordPress Portal plug-in, Customer can sign-up or login to WordPress Portal and access Dynamics CRM modules.

### 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.

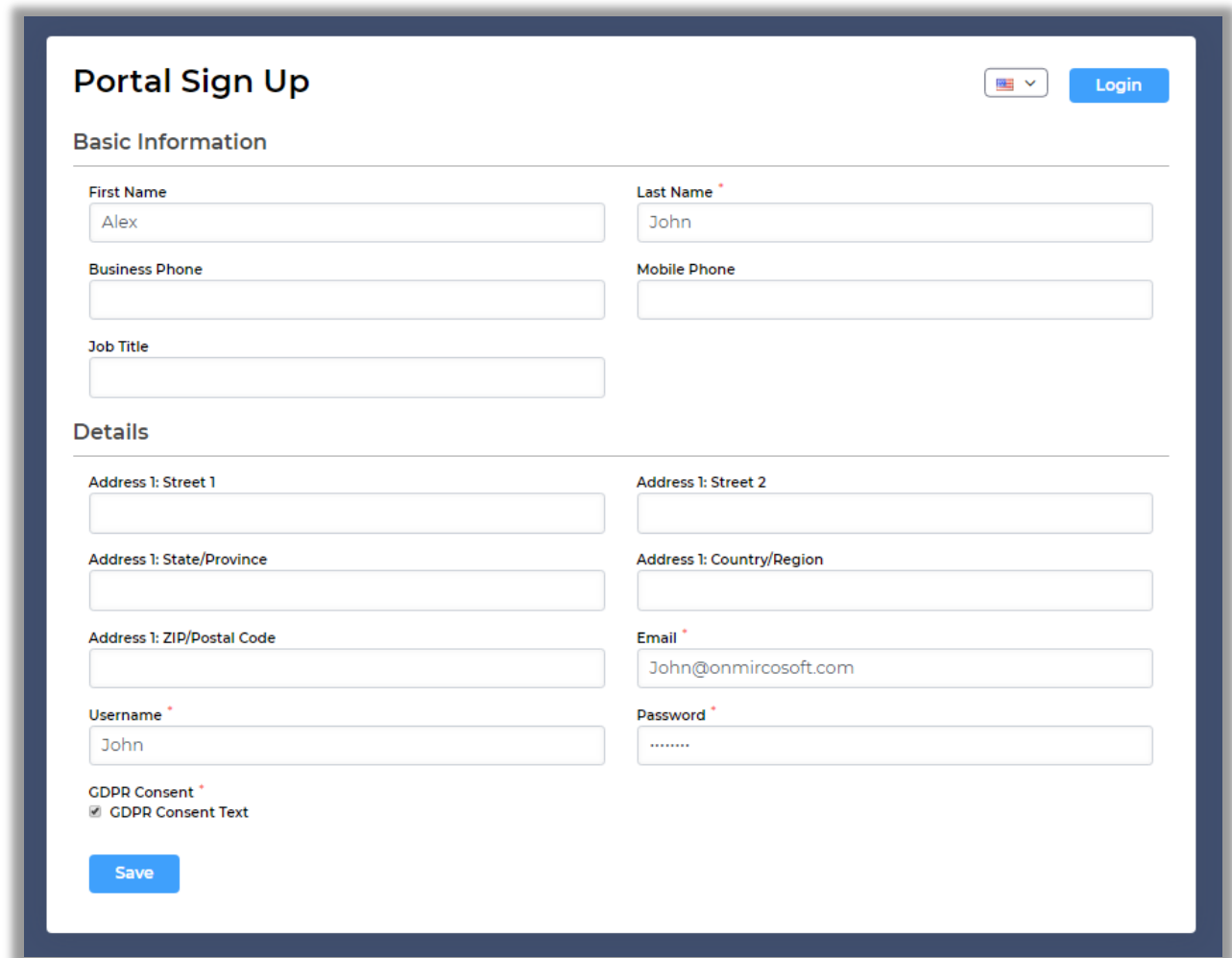


**Note:** OTP is valid for 30 minutes. If not used, then portal user needs to resend OTP and get new OTP.

### 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.



The screenshot shows a 'Portal Sign Up' form with a dark blue header and a white body. In the top right corner, there is a language dropdown menu showing the US flag and a blue 'Login' button. The form is divided into two main sections: 'Basic Information' and 'Details'. The 'Basic Information' section contains fields for 'First Name' (with 'Alex' entered), 'Last Name' (with 'John' entered), 'Business Phone', 'Mobile Phone', and 'Job Title'. The 'Details' section contains fields for 'Address 1: Street 1', 'Address 1: Street 2', 'Address 1: State/Province', 'Address 1: Country/Region', 'Address 1: ZIP/Postal Code', 'Email' (with 'John@onmicrosoft.com' entered), 'Username' (with 'John' entered), and 'Password'. At the bottom left of the 'Details' section, there is a 'GDPR Consent' checkbox labeled 'GDPR Consent Text' which is checked. A blue 'Save' button is located at the bottom left of the form.

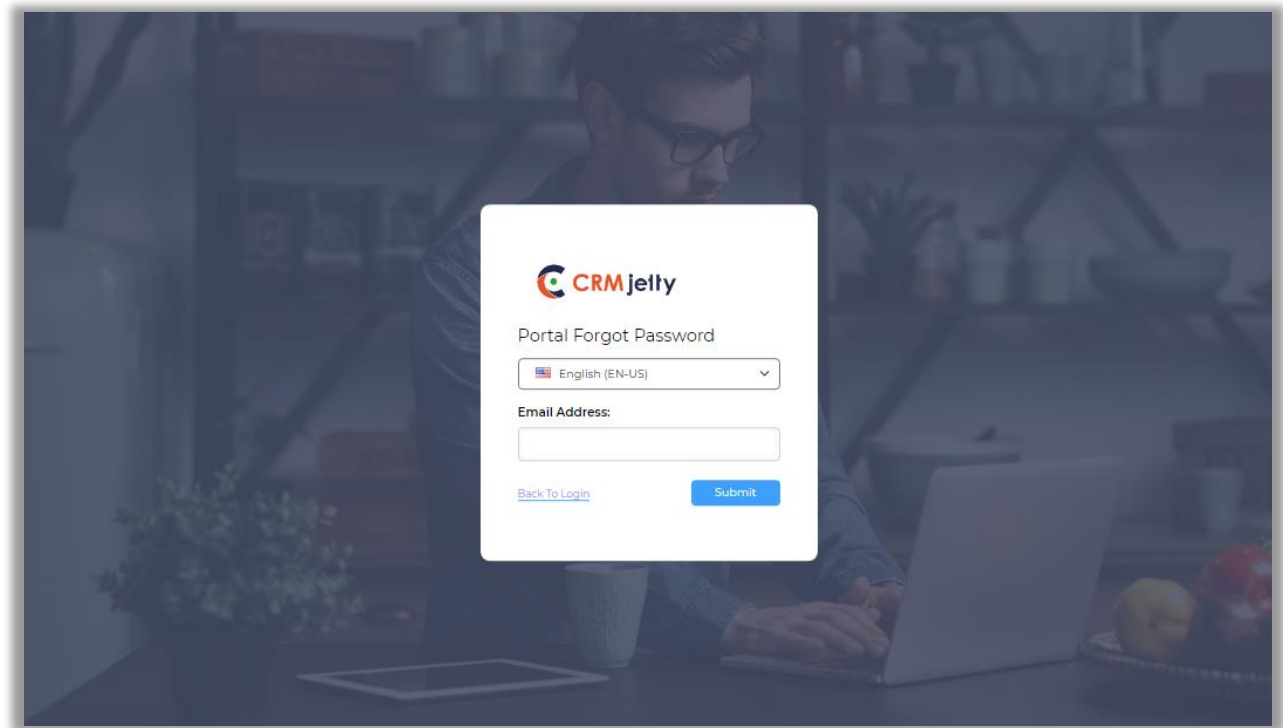
## USER MANUAL: Dynamics CRM Customer Portal for WordPress

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- 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.

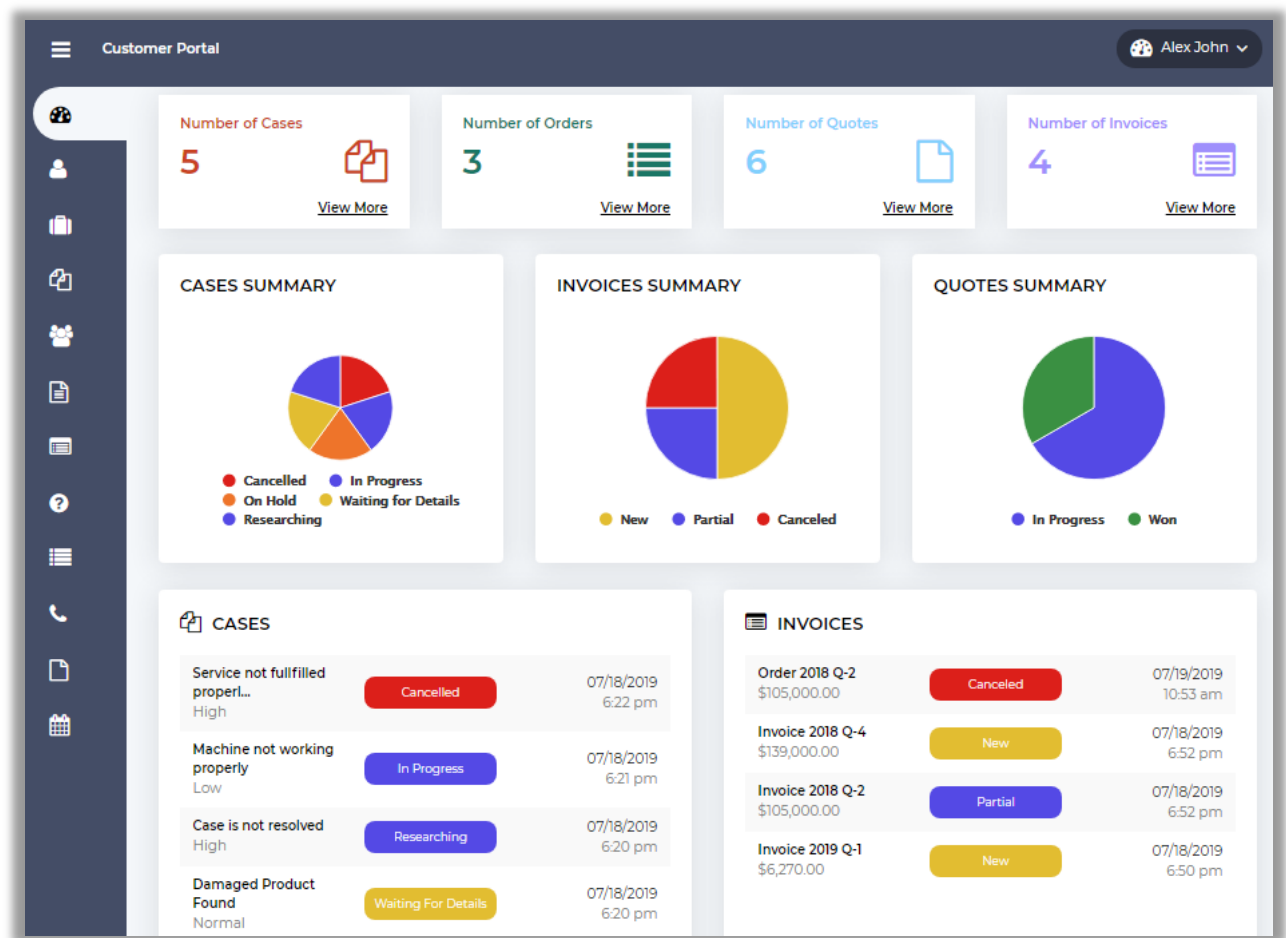
### Forgot Password

- 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

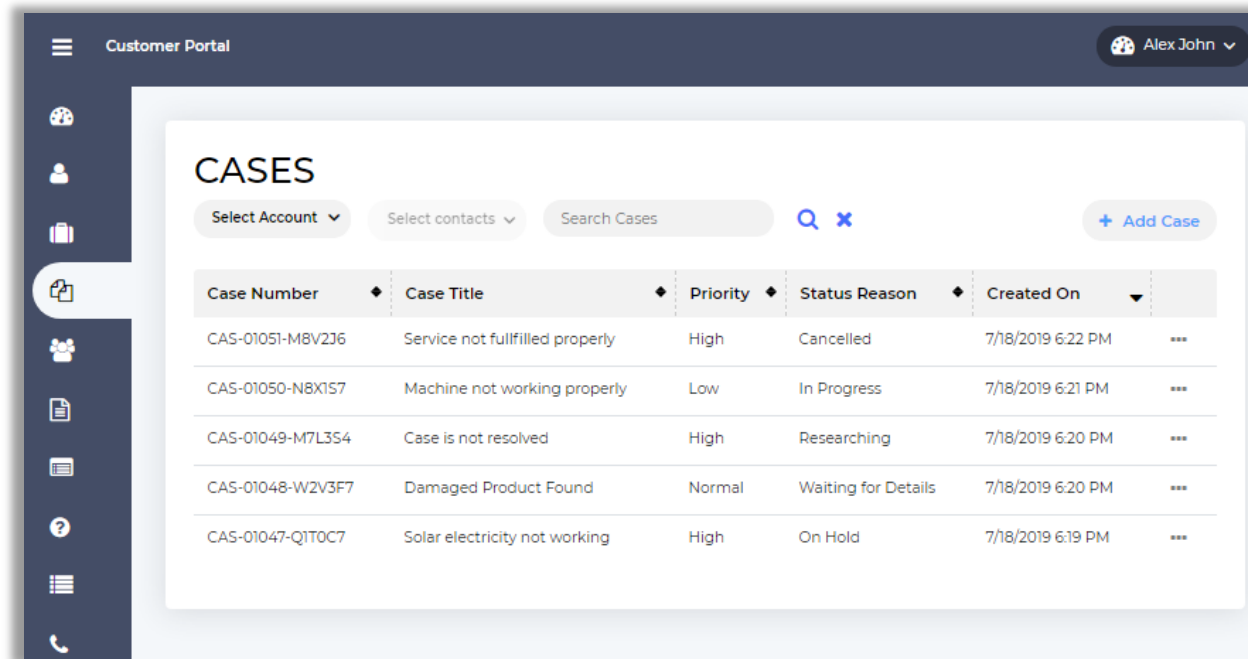
- Quickly access any module using the module icons. WordPress admin can set the accessibility to recently added records for portal users. Accordingly, those modules with their recent records will be displayed on the dashboard.



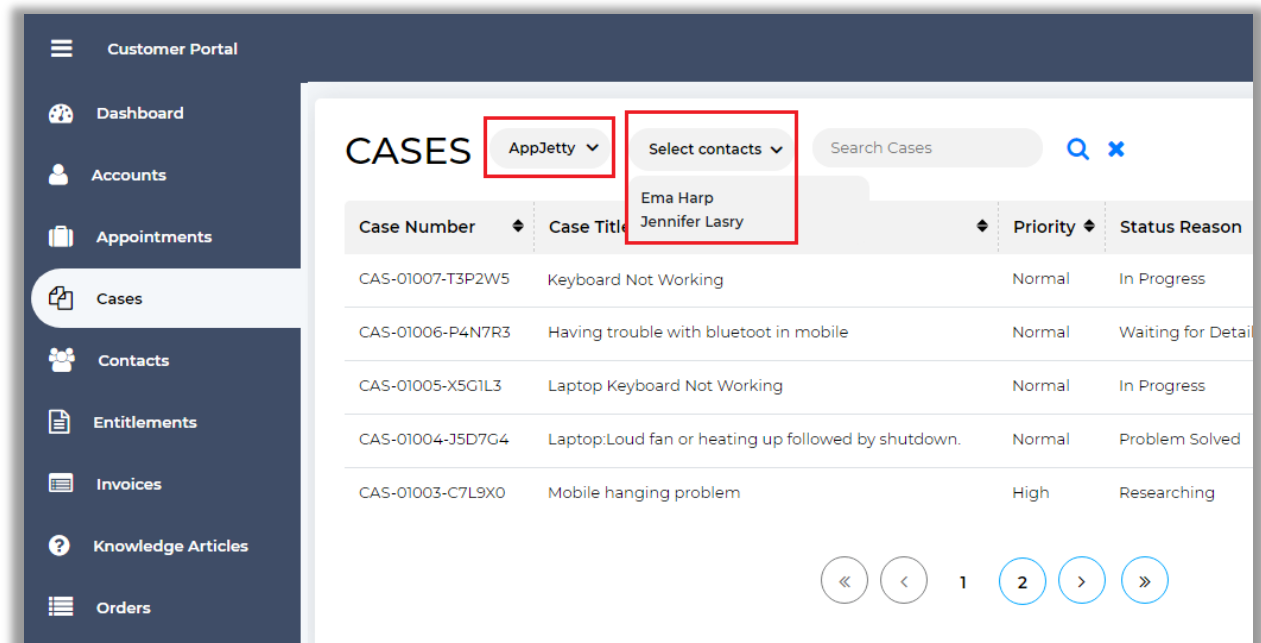
- Dashboard also includes recent activities on dashboard as well as top modules.

## 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.

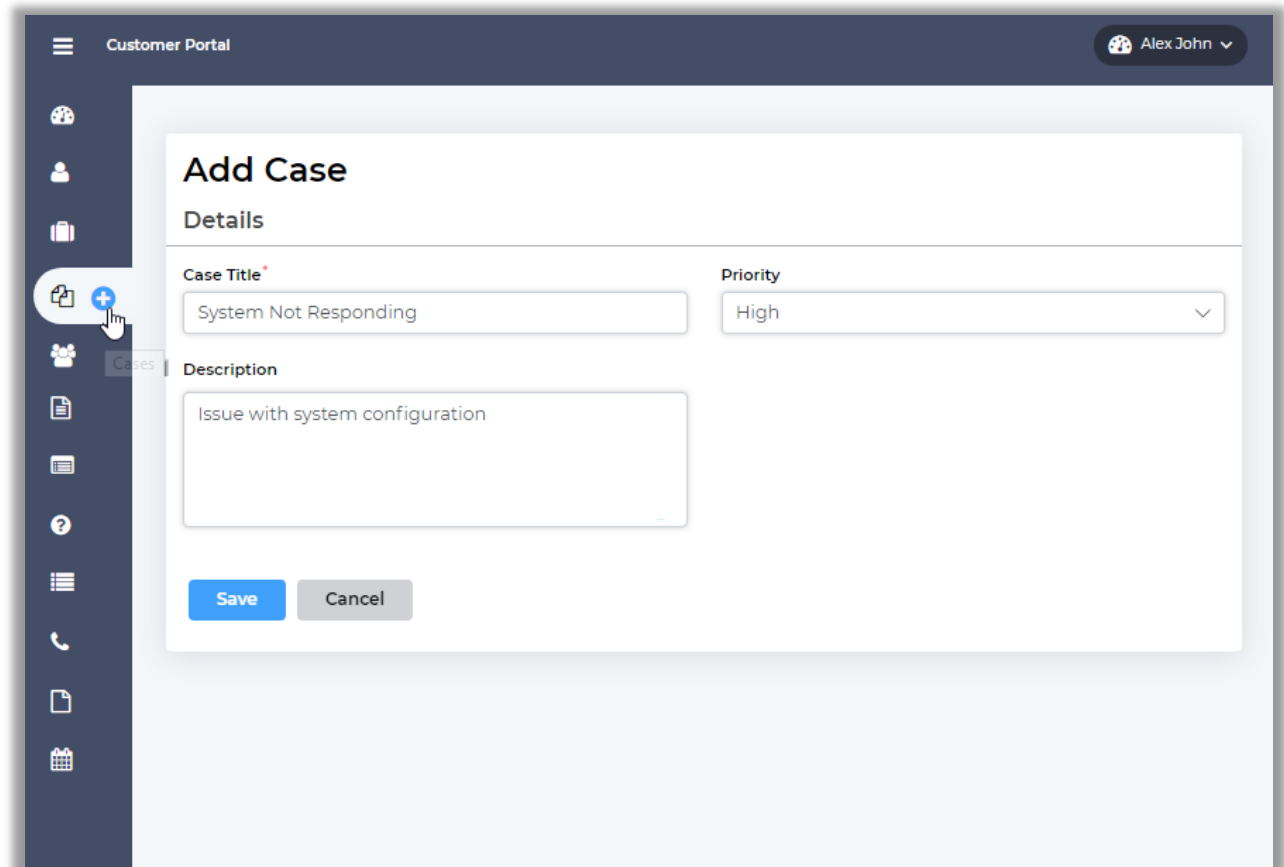


- You can also filter the existing cases based on **Account** and **Contact** selection which are configured in Dynamics CRM.



### 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 particular record's module will.



The screenshot shows the 'Customer Portal' interface. On the left is a dark sidebar with various icons. A hand cursor is clicking on a blue '+' icon next to the 'Cases' module icon. The main content area displays the 'Add Case' form. The form has a title 'Add Case' and a section 'Details'. It contains three input fields: 'Case Title' with the text 'System Not Responding', 'Priority' with a dropdown menu showing 'High', and 'Description' with the text 'Issue with system configuration'. At the bottom of the form are two buttons: 'Save' (blue) and 'Cancel' (grey). The top right of the portal shows the user's name 'Alex John'.

- 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.

The screenshot shows the 'Customer Portal' interface. At the top, there's a header with a menu icon, the text 'Customer Portal', and a user profile 'Alex John'. A sidebar on the left contains various icons for navigation. The main content area is titled 'Case' and shows the case title 'Service not fulfilled properly'. Below this, there's a 'Details' section with a table of case information. To the right of the details is a '+ Add Case' button. Below the details is a 'Notes' section with a 'Title' field, a 'Description' field, and a 'Documents' section with a 'No file Chosen' message and a list of allowed file extensions. A 'Save' button is at the bottom of the notes section.

Details			
Case Number:	CAS-01051-M8V2J6	Case Title:	Service not fulfilled properly
Priority:	High	Description:	
Status Reason:	Cancelled	Created On:	07-18-2019 06:22 PM

**Notes**

Title: +

Description:

Documents:

No file Chosen

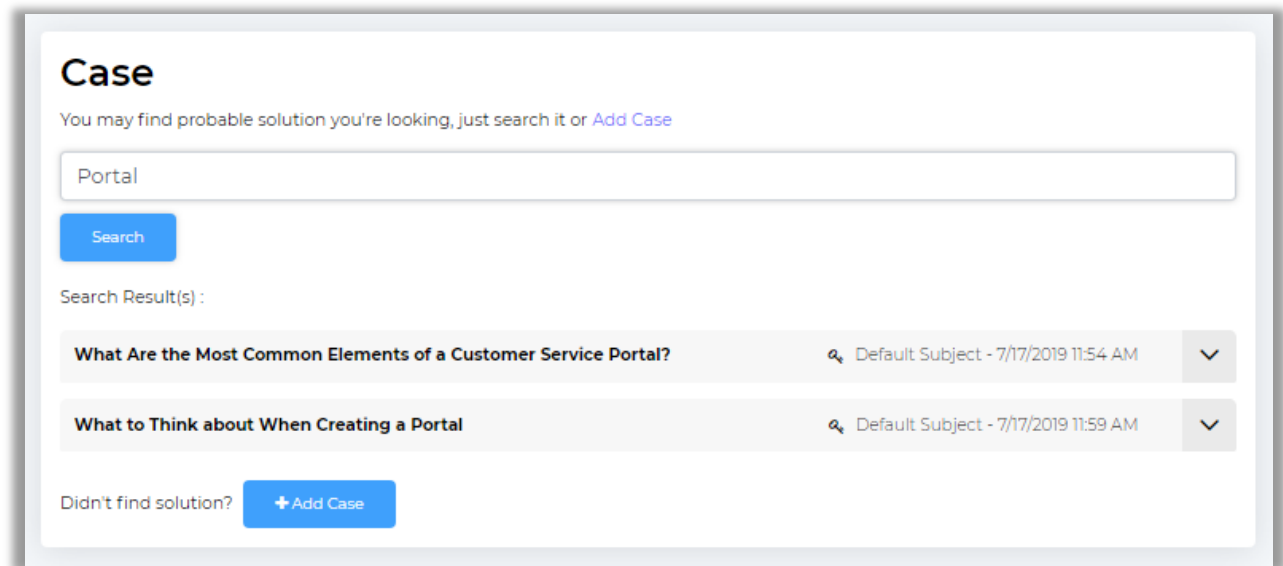
Allowed file extensions are : .jpg, .zip, .jpeg, .png, .gif, .doc, .docx, .pdf, .txt, .csv, .xls, .xlsx

Save

- 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.

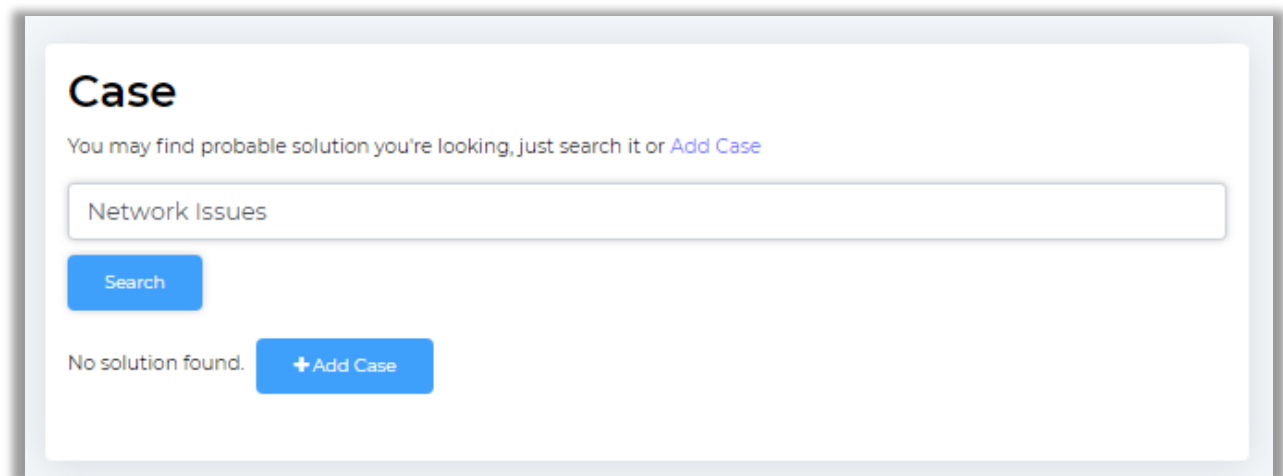
## Case Deflection

- 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.



The screenshot shows the 'Case' page of the Dynamics CRM Customer Portal. At the top, the heading 'Case' is followed by the text 'You may find probable solution you're looking, just search it or [Add Case](#)'. Below this is a search input field containing the text 'Portal'. A blue 'Search' button is positioned to the right of the input field. Underneath the search bar, the text 'Search Result(s) :' is displayed. Two search results are listed in a table-like format. The first result has the title 'What Are the Most Common Elements of a Customer Service Portal?' and the details 'Default Subject - 7/17/2019 11:54 AM' with a downward arrow icon. The second result has the title 'What to Think about When Creating a Portal' and the details 'Default Subject - 7/17/2019 11:59 AM' with a downward arrow icon. At the bottom left, the text 'Didn't find solution?' is followed by a blue button labeled '+ Add Case'.

- 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.



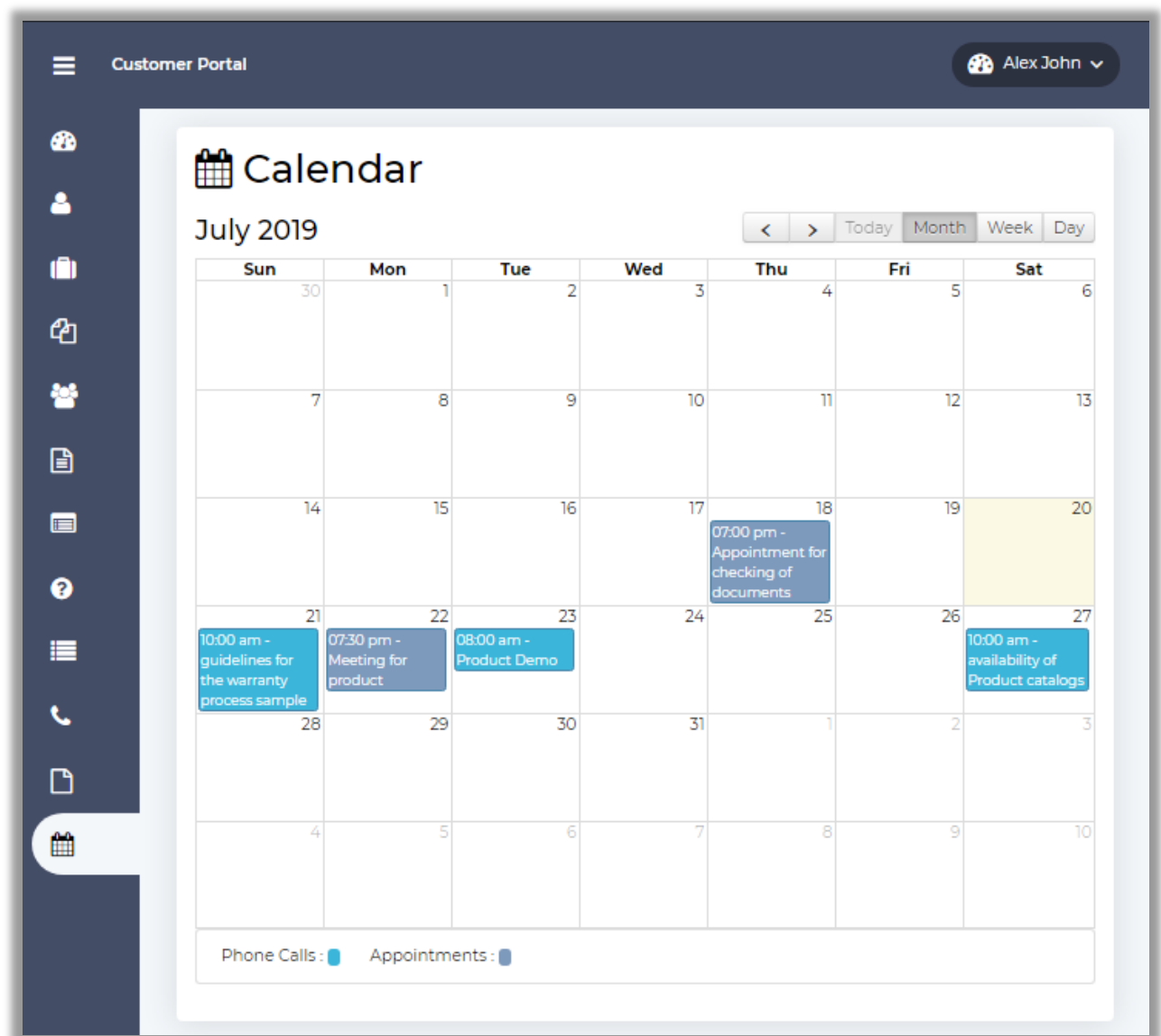
The screenshot shows the 'Case' page of the Dynamics CRM Customer Portal. At the top, the heading 'Case' is followed by the text 'You may find probable solution you're looking, just search it or [Add Case](#)'. Below this is a search input field containing the text 'Network Issues'. A blue 'Search' button is positioned to the right of the input field. Below the search bar, the text 'No solution found.' is displayed, followed by a blue button labeled '+ Add Case'.

- 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.



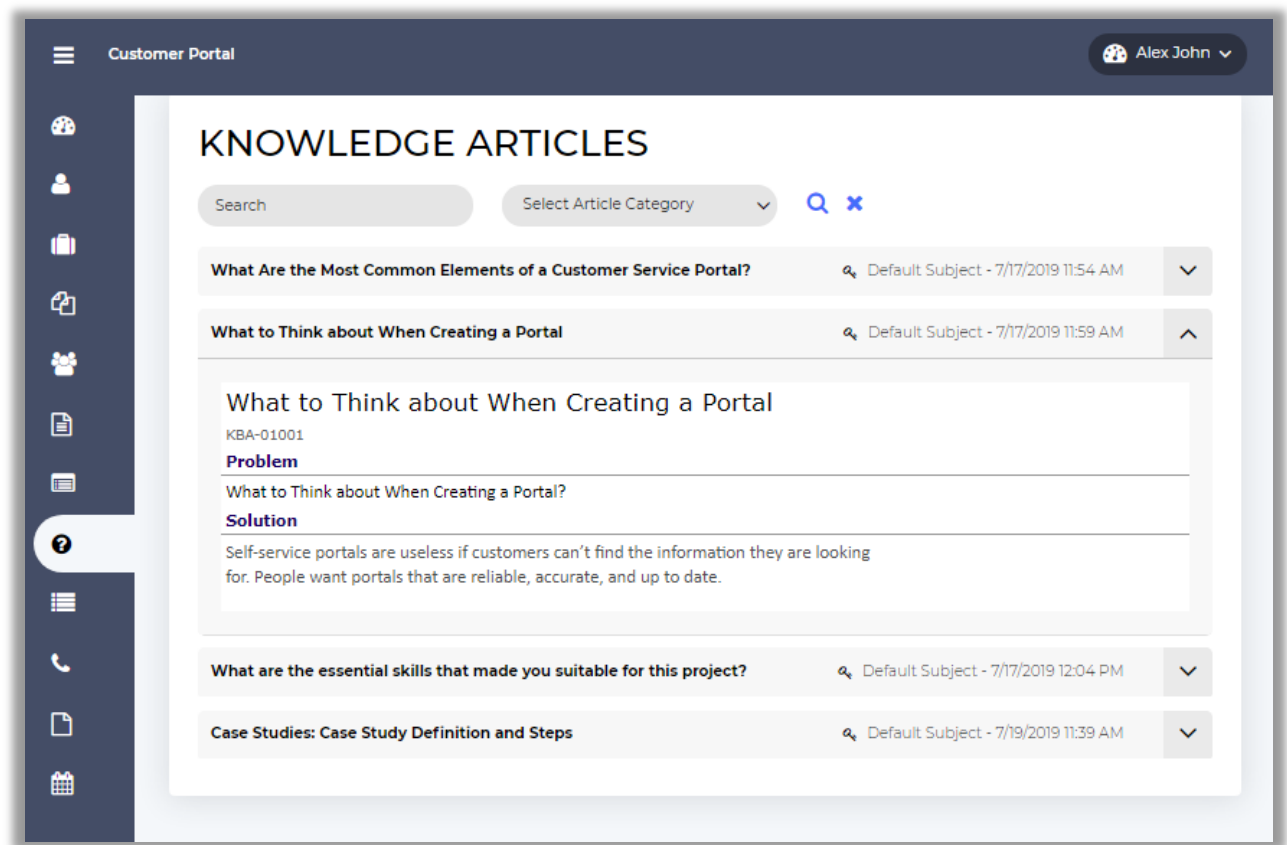
Calendar Page

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



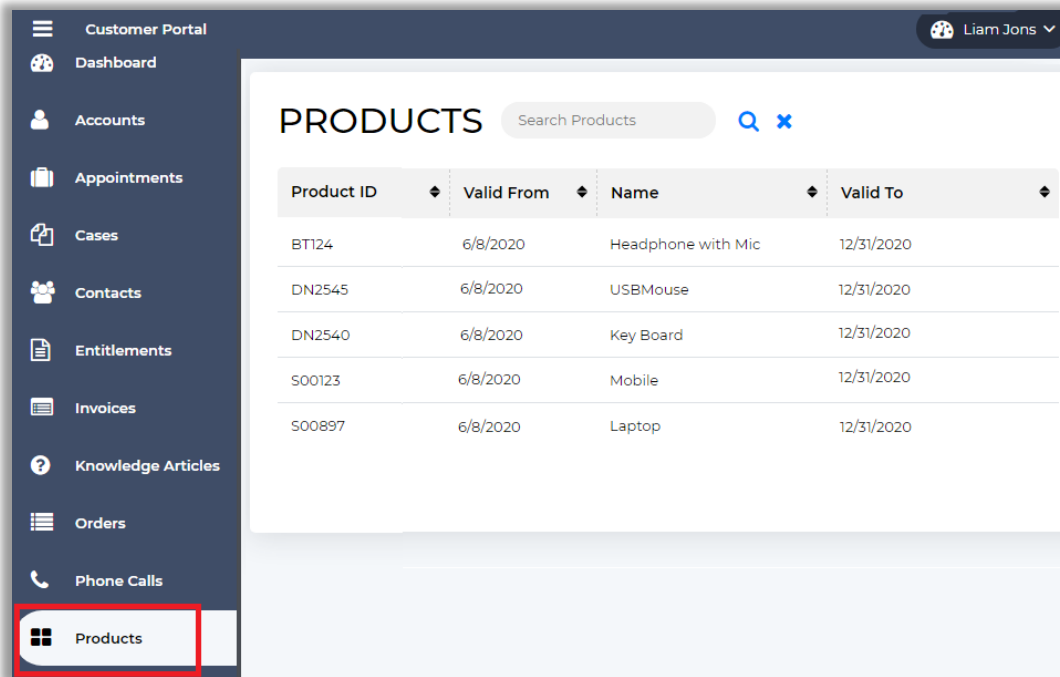
Knowledge Base

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

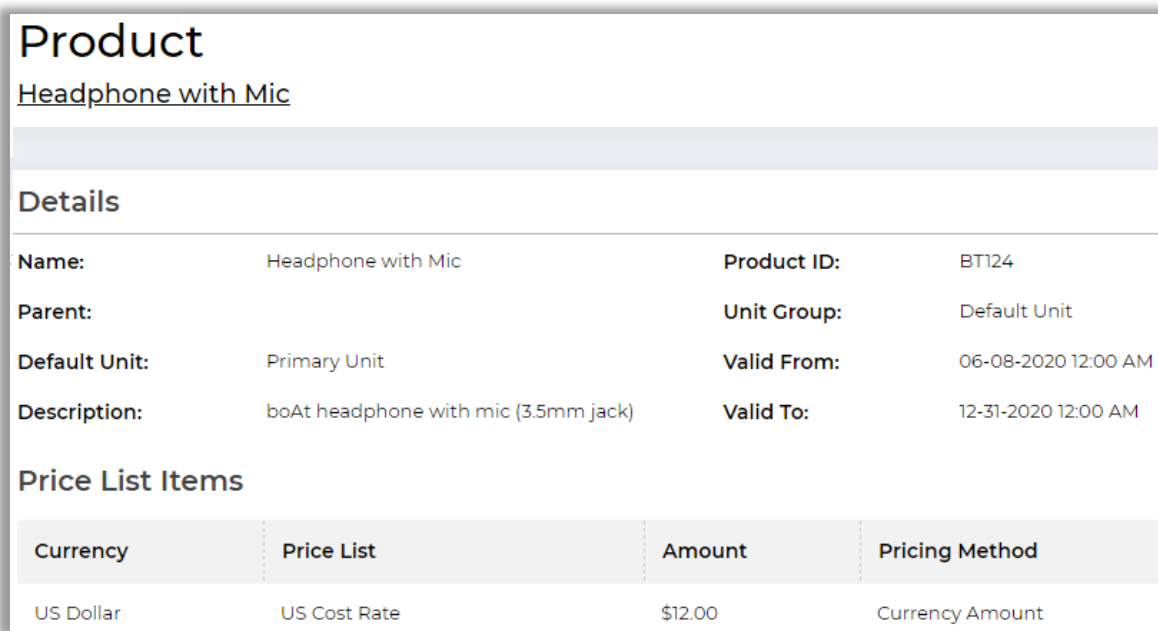


## Products

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



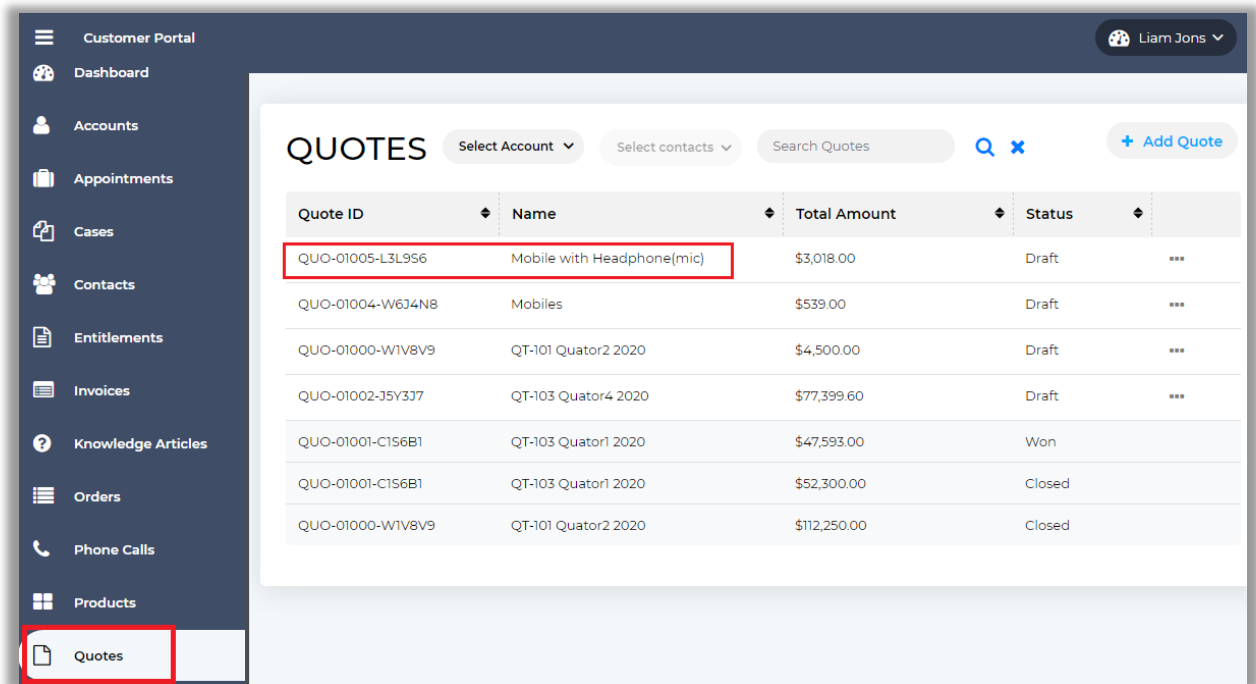
- By clicking on any product, your customers will get the details of the product which are inserted from the CRM side.



- 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 Accessible Modules from the CRM, the user can add the Quote from the customer portal. The user can edit & delete the Quotes as well 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 screenshot displays the 'Customer Portal' interface. On the left is a dark sidebar with a menu containing: Dashboard, Accounts, Appointments, Cases, Contacts, Entitlements, Invoices, Knowledge Articles, Orders, Phone Calls, Products, and Quotes. The 'Quotes' menu item is highlighted with a red box. The main content area is titled 'QUOTES' and includes filters for 'Select Account' and 'Select contacts', a search bar, and an '+ Add Quote' button. Below these is a table with the following data:

Quote ID	Name	Total Amount	Status	
QUO-01005-L3L9S6	Mobile with Headphone(mic)	\$3,018.00	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	
QUO-01001-C1S6B1	QT-103 Quator1 2020	\$52,300.00	Closed	
QUO-01000-W1V8V9	QT-101 Quator2 2020	\$112,250.00	Closed	

- 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 their requirement. Details like Discount, Tax, Shipping Information, etc.

### Quote

+ Add Quote

Laptop & Headphone (combo)

Details

Quote ID:

QUO-01006-H5X8N7

Name:

Laptop & Headphone (combo)

Currency:

US Dollar

Status:

Draft

Status Reason:

In Progress

Shipping Information

Shipping Method:

Payment Terms:

Freight Amount:

No.	Product	Unit	Price Per Unit	Quantity	Manual Discount	Tax	Extended Amount
1	Laptop	Primary Unit	\$4,490.00	5	-	-	\$22,450.00
2	Headphone with Mic	Primary Unit	\$12.00	5	-	-	\$60.00
Subtotal:							\$22,510.00
Discount:							\$0.00
Tax:							\$0.00
Grand Total:							\$22,510.00

- Suppose the user wants to add a Quote. To add a Quote, they need to click on the + **Add Quote** option from 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.

## Add Quote

**Quote Title \***

Laptop & Headphone (combo)

**Currency \*** US Dollar ▼ **Price List \*** US Cost Rate ▼

**Select Product Line Items \***

<input type="checkbox"/>	Product	Unit Price	Qty	Total
<input checked="" type="checkbox"/>	Laptop	\$4,490.00	5	\$4,490.00
<input type="checkbox"/>	Mobile	\$597.00	1	\$597.00
<input checked="" type="checkbox"/>	Headphone with Mic	\$12.00	5	\$12.00

**Save** **Cancel**

- 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.

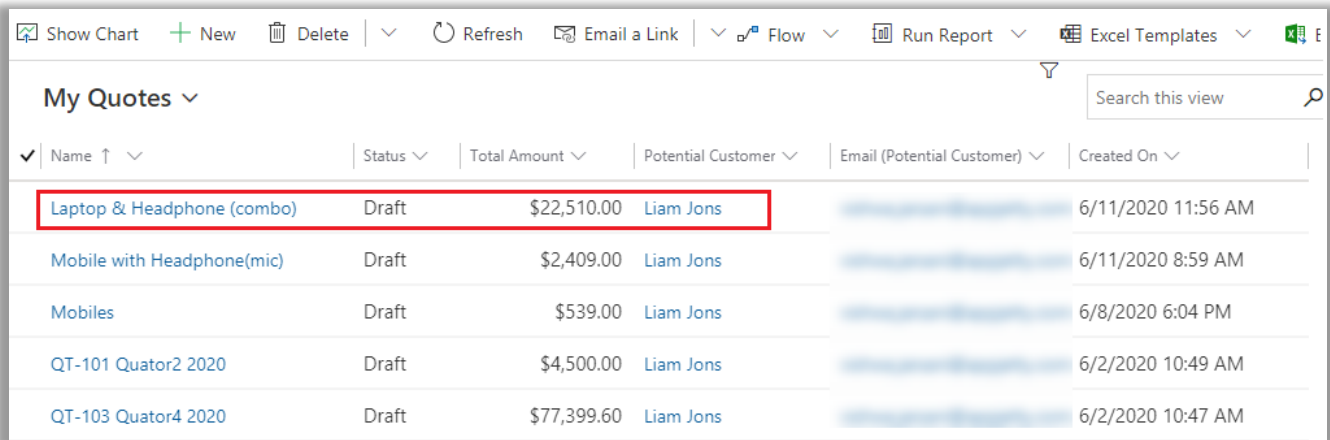
## QUOTES

Select Account ▼ Select contacts ▼ Search Quotes Q × + Add Quote

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	

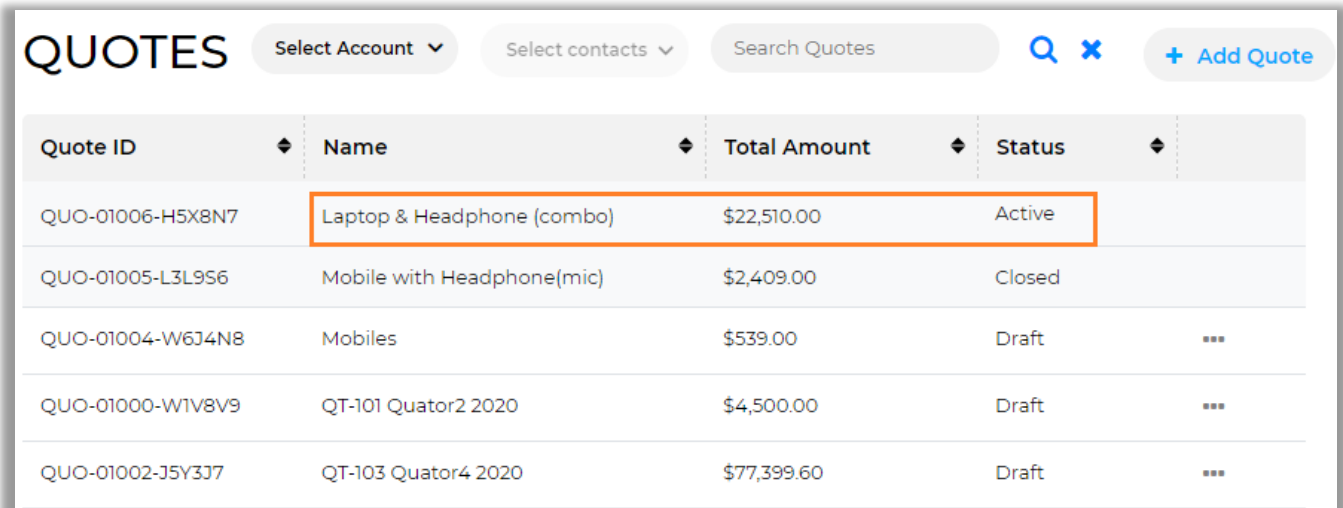
## USER MANUAL: Dynamics CRM Customer Portal for WordPress

- 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

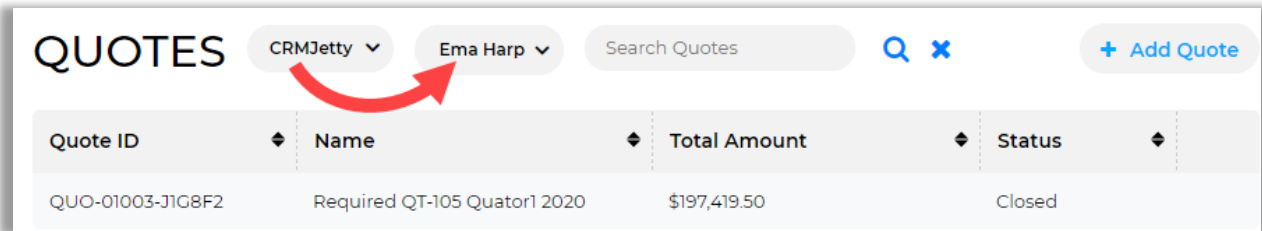
- By clicking on it, you can check the users quote details like Products, their Quantity, and other related details like Amount and provide the discount etc. and change the **Quote status** as per your requirement.
- Once you **activate** the **Quote** from the CRM, the User will not able to edit the Quote.



Quote ID	Name	Total Amount	Status
QUO-01006-H5X8N7	Laptop & Headphone (combo)	\$22,510.00	Active
QUO-01005-L3L9S6	Mobile with Headphone(mic)	\$2,409.00	Closed
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

### 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 particular user (user).



The screenshot shows the 'QUOTES' section of the Dynamics CRM Customer Portal. At the top, there is a header with the word 'QUOTES' in large letters. To its right are two dropdown menus: 'CRMJetty' and 'Ema Harp'. A red curved arrow points from the 'CRMJetty' dropdown to the 'Ema Harp' dropdown, indicating a selection process. Further right is a 'Search Quotes' input field with a magnifying glass icon and a close 'X' icon. To the far right is a button labeled '+ Add Quote'. Below the header is a table with four columns: 'Quote ID', 'Name', 'Total Amount', and 'Status'. Each column has a small diamond icon for sorting. The table contains one row of data.

Quote ID	Name	Total Amount	Status
QUO-01003-J1G8F2	Required QT-105 Quator1 2020	\$197,419.50	Closed

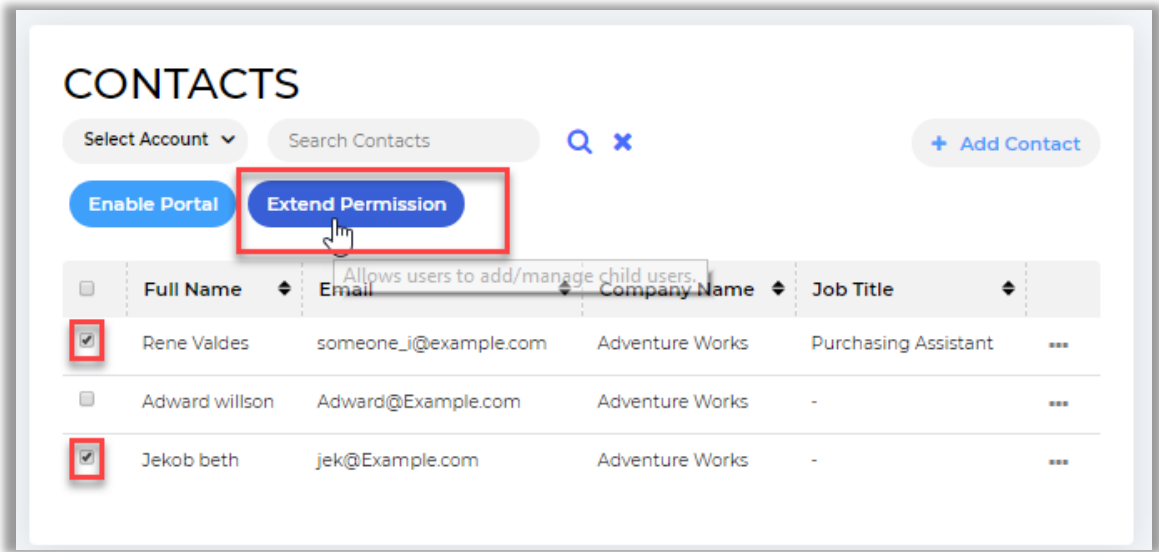


## Contact Management

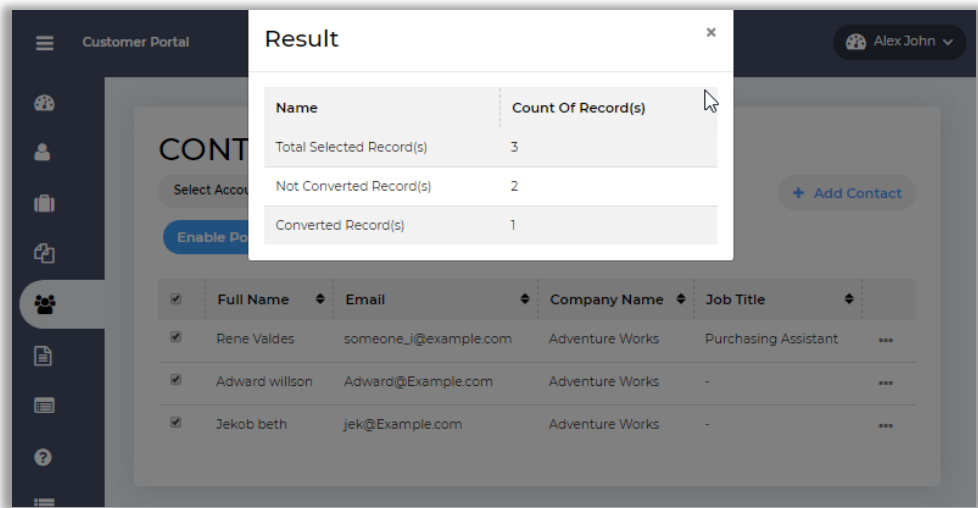
- Portal Users can manage contacts as per the access rights provided to them. *i.e.* They can add new contact, provide access to interface from portal itself by generating credentials.
- For adding contact, navigate to contact tab and click on 'Add Contact' to add new contact.

The screenshot displays the 'Add Contact' form within the Dynamics CRM Customer Portal. The form is structured into two main sections: 'Basic Information' and 'Details'. The 'Basic Information' section contains fields for 'First Name', 'Last Name', 'Business Phone', 'Mobile Phone', 'Job Title', and 'Company Name' (a dropdown menu). The 'Details' section includes fields for 'Address 1: Street 1', 'Address 1: Street 2', 'Address 1: ZIP/Postal Code', and 'Email'. There are also checkboxes for 'Have Portal Account' and 'Extend Permission' with an information icon. A blue 'Save' button is located at the bottom left of the form. The left sidebar shows various icons, with the 'Add Contact' icon (a person with a plus sign) highlighted. The top right of the portal shows the user 'Alex John'.

- 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.



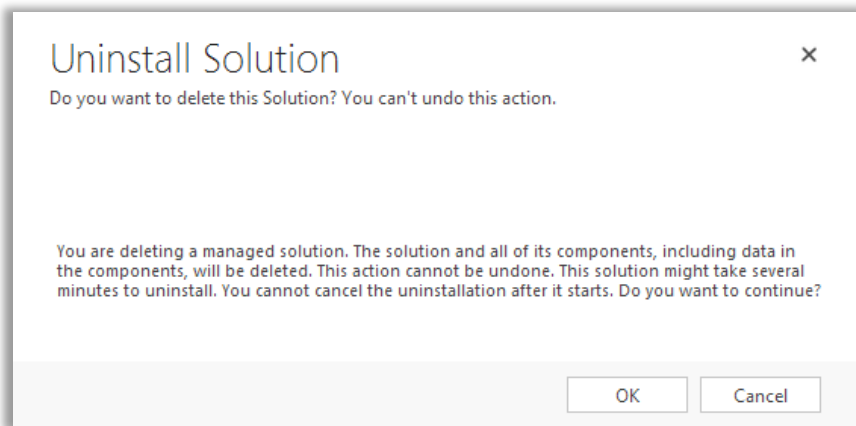
- It will provide the summary to converted and not converted contacts.

## 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.



## 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](mailto:support@crmjetty.com) Or you can login to your account @ [www.crmjetty.com](http://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](mailto:sales@crmjetty.com)