



vtiger Customer Portal 5.0 User Manual

Document History

Version 5.0.0

Date: August 3, 2006

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1. Introduction

vtiger Customer Portal is an add-on package for vtiger CRM, an Open Source Customer Relationship Management solution. You can host the vtiger Customer Portal package in your Web site and enable self-service to your customers.

Note: vtiger Customer Portal 5.0 package works only with vtiger CRM 5.0.

Working Principle

1. Customer' information (Contacts in vtiger CRM) is registered in vtiger CRM.
2. vtiger CRM – Support Administrator enables Portal access to the customer.
3. Customers access Portal service and first view the Knowledge Base. If solution is not available, then submits a trouble ticket.
4. Now, trouble ticket is transferred to the vtiger CRM system and displayed under **Trouble Tickets** module.
5. In vtiger CRM, Support Manager assigns tickets to the Support Agents.
6. Support Agent receives an automated E-mail with the status of the ticket.
7. Once Support Agent responds to the problem, solution is displayed under customer's Portal Home page. After reviewing the solution, customer can send further details if the problem is not solved.
8. This process continues till the ticket is permanently closed.

2. Installing vtiger Customer Portal

- System Requirements
- Installation Prerequisites
- Installation Procedure

2.1. System Requirements

- **Hardware:** x486 with 256 MB RAM or higher with a minimum of 100 MB disk space
- **Operating System:** Windows 2000/NT/XP
- **Web Server:** Apache version 2.0.40 and higher or Microsoft version IIS 5 and higher
- **PHP:** 4.2.x through 5.1.x.

2.2. Installation Prerequisites

- The vtiger CRM 5.0 must be used as CRM software by the Product/Service Provider
- PHP (version 4.2.x or 5.1.x.) is installed in Product/Service Provider's Web site before installing vtiger Customer Portal

2.3. Installation Procedure

1. Download [vtigercrm-customerportal-5.0.0.zip](#) file from the Sourceforge.net.

2. Extract the **vtigercrm-customerportal-5.0.0.zip** file to an appropriate location in your Web site. After extracting the file structure will be *<Web Site>/vtigerCRM/customerportal/<Portal related Files>*. You can also modify the directory structure as per your Web site file conventions.

3. Modify the **PortalConfig.php** file present under *vtigerCRM/customerportal/* as given below:

Server_Path: Specify the absolute path (URL) of the vtiger CRM server. For example, if your vtiger CRM server is running at `http://vtigercrm.com/demo` means you need to specify the `Server_Path` as given below:

```
$Server_Path = "http://en.vtiger.com/";
```

Authenticate_Path: Specify the absolute path (URL) of the vtiger Customer Portal directory in your Web site. For example, if you have extracted the vtiger Customer Portal related files in to your Web site at <http://vtiger.com/demo/portal> means you need to specify the value for Authenticate_Path parameter as given below:

```
$Authenticate_Path = "http://en.vtiger.com/portal";
```

\$upload_dir: Specify the folder patch where customers can attach files temporarily to your Website

```
$upload_dir = '/tmp';
```

Proxy Server Settings: Configure proxy server details if your server is running behind proxies:

```
$proxy_host = ''; //Host Name of the Proxy server
```

```
$proxy_port = ''; //Port Number of the Proxy server
```

```
$proxy_username = ''; //User Name to access proxy server
```

```
$proxy_password = ''; //Password of the user to access proxy server
```

Now save the **PortalConfig.php** file.

4. Modify the Look & Feel of the Portal pages as per your Web site requirements. By default, **customerportal.css** file is bundled with vtiger Customer Portal. You can customize the CSS file as per your Web site requirements. If you are planning to use a different CSS file, change the CSS file link in **index.php** , **cp_index.php**, and **UserTickets.php** files:

```
<link rel="stylesheet" type="text/css" href="css/style.css">
```

5. You may also change the complete layout of the Portal if you are having hands-on-experience with PHP, HTML, and CSS. You can also add terms and conditions, how to use customer portal, policy statement and other details as per your organization requirements. These details are beyond the scope of this manual.

Now your Customer Portal is ready for customers to post their Trouble tickets.

3. Working with Customer Portal

Customer Portal comprises of two parts. In vtiger CRM side where vtiger CRM administrator creates **Portal Users** and customer support persons update the status of the trouble tickets. Where as in Customer Portal side the customer log in to the Portal, submit trouble tickets, and view the solutions provided by the vendor.

3.1 vtiger CRM Side

In vtiger CRM user interface, you can perform the following operations

- Manage portal users
- Track to trouble tickets
- Manage frequently asked questions

To create Customer Portal users

1. Log in to vtiger CRM.
2. In the **Support → Contacts** module, either create a new contact or edit the existing contact.
3. In the Contact: <Contact Name> page, go to the *Customer Portal Information* section, and select the **Portal User** check box. Also, select the Support Start and End dates from Support Start Date and Support End Date respectively.
4. Click the **Save** button. An E-mail message will be sent to customer intimating the user login details.

Note: Before creating portal user, ensure that your vtiger CRM system administrator has configured Outgoing E-mail server properly, otherwise E-mail message will not be sent to the Customer.

To resolve the trouble tickets

1. Log in to vtiger CRM.
2. Click the **Support → Trouble Tickets** tab.
3. In *HelpDesk Home* page, under List View, select the trouble ticket assigned to you.
4. In *Trouble Ticket* page, update the ticket details, such as solution for the ticket, status, priority, and other details. After updating the ticket click the **Save** button. The updated ticket details are immediately reflected in Customer Portal.

To manage FAQ

1. Log in to vtiger CRM.
2. Click the **Support** → **FAQ** tab.
3. In *FAQ Home* page, click the Create FAQ button.
4. In *FAQ Ticket* page, create a new article. Once the article is reviewed, change the status to Publish so that it is displayed under Portal Home page.

3.2 Customer Portal Side

After creating a portal user in vtiger CRM, user login details will be sent to your customer's E-mail ID. Your customers can perform the following operations in your corporate Customer Portal:

- Log in to Customer Portal
- Submit trouble tickets
- View the Trouble Tickets status
- View FAQ
- Change Password

To log in to Customer Portal

1. Access your vendor's Customer Portal URL through Web Browser.
2. In *Portal Log in* page, enter the valid login details (user name and password) provided by your vendor.
3. Click the **Login** button. After successfully logging in, *Customer Portal Home* page is displayed.

To log out from Customer Portal

In Customer Portal Home page, click the [Log out](#) link.

To submit trouble tickets

1. In Customer Portal Home page click the [Submit New Ticket](#) link
2. In the *Create New Ticket* page specify the following details:
 - a. **Title:** Specify the title of the trouble ticket
 - b. **Description:** Describe the problem in detail.
 - c. **Priority:** Select the priority of the trouble ticket (Low, Medium, High, and Critical)
 - d. **Category:** Select the category of the trouble ticket (Big Problem, Small Problem, and Other Problem)
Note: Currently vtiger Customer Portal supports very limited fields.
3. Click the **Submit** button. Your ticket will be displayed in Home page under Open Tickets section.

To view trouble ticket status

1. In *Customer Portal Home* page Open and Closed tickets status are displayed under the *My Open Tickets* and *Closed Tickets* sections respectively.

2. In *My Open Tickets* section, click the ticket to view the ticket details.
3. You can also provide additional details for resolving the problem (If required) in the Comments field and click the **Submit** button.

To change the Password

1. In *Customer Portal Home* page, click the My Profile hyperlink.
2. In the *My Profile* page section, change the password and click the **Submit** button. You can use the new password next time when you login again.

5. Customer Support

Please post your valuable comments, feature requests, and issues in **vtiger CRM Discussions** (<http://www.vtiger.com/discussions/>) so that we can provide technical support for you.

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