vtiger Customer Portal 4.2
User Manual

(Version 2.0)

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1. Introduction

The **vtiger Customer Portal** is an add-on package for vtiger CRM, an Open Source Customer Relationship Management project hosted in Sourceforge. You can host the vtiger Customer Portal package in your Web site and enable self-service to your customers for managing better customer relations.

Note: The vtiger Customer Portal 4.2 package works only with vtiger CRM 4.2.

Working Principle

1. Customer names are registered in vtiger CRM (Account/Contacts based on the product purchased can be one of the criteria)

2. Login information is provided to the customers to submit trouble tickets from your corporate Web site

3. After logging in, customers first view the Knowledge Base. If solution for the problem is not available, they can submit trouble ticket.

4. The trouble ticket is transferred to the vtiger CRM server through Web services and displayed under the **Trouble Tickets** section of the **HelpDesk** module.

5. In vtiger CRM, Customer Support person or Administrator of a particular group pickup the trouble tickets submitted by customers.

6. Once the ticket is assigned to Customer Support person, an automated E-mail will be sent to the customer about status of the ticket. Later Customer Support person resolves the trouble ticket.

7. The solution is displayed under customer's Customer Portal Home page. After reviewing the solution, customer can send further details if the problem is not solved and the process continues until the trouble ticket is closed.

2. Installing vtiger Customer Portal

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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/2003

- **Web Server:** Apache version 2.0.40 and higher or Microsoft version IIS 5 and higher

- **PHP:** 4.2.X through 4.3.X.

2.2. Installation Prerequisites

- The vtiger CRM 4.2 must be used as CRM software by the Product/Service Provider

- PHP (version 4.2.x or 4.3.x.) is installed in Product/Service Provider's Web site before installing vtiger Customer Portal

2.3. Installation Procedure

1. Download the **vtiger_Customer_Portal_4_2.zip** file from the
http://prdownloads.sourceforge.net/vtigercrm/vtiger_Customer_Portal_4_2.zip?download

2.Extract the **vtiger_Customer_Portal_4_2.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://vtigercrm.com/demo/";

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://vtiger.com/demo/portal";

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="customerportal.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 vtiger 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. In Customer Portal side the customer log in to the Customer Portal, submit the 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

- Create portal users

- Resolve the trouble tickets

- Create FAQ

To create Customer Portal users

1. Log in to vtiger CRM.

2. In the **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 **HelpDesk** tab.

3. In *HelpDesk Home* page, click the **Tickets** tab. 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.

3.2 Customer Portal Side

Immediately after creating 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 the Customer Portal

1. Access your vendor's Customer Portal URL through Web Browser.

2. In Login page, enter 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 the Customer Portal

In Customer Portal Home page, click the Logout 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 the 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.