

Customer Portal Enhancements

Earlier customer portal had only two tabs – Tickets and Faq.

Now Faq is renamed to **Knowledge base**. Contact, Account, Products, Invoice, Quotes and Document tabs are added newly.

In each tab, the customer now have the drop down which has two values – All/Mine (except for Knowledge Base, Account and Contact). Selecting All will show the records that belong to the logged in Contact, contact's account and the contacts that belong to same account.

Contact tab, by default shows up the details of the Logged in Contact. When the other contact id's are passed through the url or contact name is clicked from Products or other modules, that Contact's details will be shown up (Only if the logged in Contact is authorized to view the requested Contact's detail – i.e., only if they belong to same Account)

Account tab will show the logged in Contact's account information.

Tickets/Quotes/Invoice/Documents tab will show all the records that belong to logged in Contact, Contact's Account and the Contacts of the same account. Choosing the option 'Mine' will show only the records that are associated with the logged in Contact.

Products tab will show all those product that are associated with a Contact either directly or through Quotes or Invoice.

Configuration Settings:-

A new file called **PortalConfig.php** is added to root directory of Vtiger CRM. This let's the **CRM administrator** to configure what modules/records have to be shown through the customerportal and what should not be.

Following is the snippet of the file contents of PortalConfig.php :-

```
$configModules = array(
    'Tickets'=> array('allow' => true, 'viewall' => true),
    'Faq'=> array('allow' => true, 'viewall' => true),
    'Contacts'=> array('allow' => true, 'viewall' => true),
    'Accounts'=> array('allow' => true, 'viewall' => true),
    'Products'=> array('allow' => true, 'viewall' => true),
    'Invoice'=> array('allow' => true, 'viewall' => true),
    'Quotes'=> array('allow' => true, 'viewall' => true),
    'Documents'=> array('allow' => true, 'viewall' => true)
);
```

The parameter '**allow**' lets the CRM administrator to enable/disable a particular module for the customerportal. (Modules are pre-defined. New modules cannot be added to this). Setting 'allow' to true, will give access to that module in the customerportal. Setting it to false, will not show up the tab for that module in Customer portal. **By default, 'allow' is set to true for all the above mentioned modules.**

Eg:

```
'Products'=> array('allow' => false, 'viewall' => true),
```

→ This will remove the tab 'Products' from customerportal.

The parameter '**viewall**' lets the CRM administrator to decide whether to show only the logged in Contact's data or to show all the data that belong to logged in Contact's Account (includes the

data that belongs to the other contacts who are under same Account). Setting this parameter to true, will open up the provision to show all the records that belong to the Contact, Contact's Account and the Contacts who are under same account. Setting it to false, will show only those records that belong to the logged in Contact. **By default, 'viewall' is set to true for all the above mentioned modules.**

Eg:

```
'Invoice'=> array('allow' => true, 'viewall' => false),
```

→ This will enable the logged in Contacts to view only those invoice that are related to them. Invoice related to their Account or other Contacts of their Account will not be accessible.

Following screenshots will demonstrate the new features added:-

My Tickets	Knowledge Base	Contact	Account	Products	Quotes	Invoice	Documents
Account Information							
Account Information							
Account Name demovtiger				Phone (670) 200-4778			
Website www.demovtiger.com				Fax			
Ticker Symbol				Member Of			
Email							
Address Information							
Billing Address 123 Anywhere Street				Shipping Address 123 Anywhere Street			
Billing Po Box				Shipping Po Box			
Billing City San Francisco				Shipping City San Francisco			
Billing State CA				Shipping State CA			
Billing Code 56952				Shipping Code 56952			
Billing Country USA				Shipping Country USA			
Description Information							
Description							
Assigned Information							
First Name				Last Name Administrator			
Email wetest@xyz.com				Office Phone			

Contact:

My Tickets	Knowledge Base	Contact	Account	Products	Quotes	Invoice	Documents
Contact Information							
Contact Information							
First Name	Dorothy	Office Phone	(848) 333-1736				
Last Name	Taylor	Mobile	(421) 571-7215				
Account Name	demovtiger	Lead Source	Word of mouth				
Title	VP Operations	Fax					
Email	dorothy_taylor@company.com						
Address Information							
Mailing Street	123 Anywhere Street			Other Street	123 Anywhere Street		
Mailing Po Box				Other Po Box			
Mailing City	San Francisco			Other City	San Francisco		
Mailing State	CA			Other State	CA		
Mailing Zip	56952			Other Zip	56952		
Mailing Country	USA			Other Country	USA		
Description Information							
Description							
Assigned Information							
First Name				Last Name	Administrator		
Email	test@myweb.com			Office Phone			

Products:

My Tickets	Knowledge Base	Contact	Account	Products	Quotes	Invoice	Documents
Products							Show Mine ▾
							Mine
							All
Products	Product Id	Product Name	Product Code	Qty/Unit	Unit Price	Related To	
	58	abcd1234	1324356	1.00	256.00	Asha	
Quotes Related Products							
No Quotes Related Products available in this status							
Invoices Related Products							
No Invoices Related Products available in this status							

My Tickets	Knowledge Base	Contact	Account	Products	Quotes	Invoice	Documents
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Products Show

Products					
Product Id	Product Name	Product Code	Qty/Unit	Unit Price	Related To
58	abcd1234	1324356	1.00	256.00	Asha

Quotes Related Products					
Product Id	Product Name	Product Code	Qty/Unit	Unit Price	Related To
55	Vtiger 25 Users Pack	023	1.00	2999.00	Taylor Dorothy
52	Vtiger Single User Pack	001	1.00	149.00	Taylor Dorothy

Invoices Related Products					
Product Id	Product Name	Product Code	Qty/Unit	Unit Price	Related To
52	Vtiger Single User Pack	001	1.00	149.00	demovtiger
55	Vtiger 25 Users Pack	023	1.00	2999.00	demovtiger

My Tickets	Knowledge Base	Contact	Account	Products	Quotes	Invoice	Documents
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Products

Products	
Product Name	abcd1234
Product Active	yes
Product Category	Hardware
Sales End Date	
Support Expiry Date	
Vendor Name	Margaret
Vendor PartNo	
Product Sheet	

Part Number	1324356
Manufacturer	
Sales Start Date	2006-09-28
Support Start Date	2006-08-20
Website	
Mfr PartNo	
Serial No	
GL Account	

Description Information

Description

Tickets:

My Tickets Knowledge Base Contact Account Products Quotes Invoice Documents

Show All

My Open Tickets

Ticket Id	Title	Status	Category	Related To	Modified Time	Created Time
111	Upload Attachment problem	Open	Big Problem	Asha	2008-10-19 17:42:46	2008-10-19 17:38:09
128	new ticket	Open	Big Problem	Asha	2008-10-20 11:02:59	2008-10-20 11:02:59

Closed Tickets

Ticket Id	Title	Status	Category	Related To	Modified Time	Created Time
126	test1	Closed	Big Problem	Asha	2008-10-20 10:46:57	2008-10-20 07:01:44

My Tickets Knowledge Base Contact Account Products Quotes Invoice Documents

Show All

My Open Tickets

Ticket Id	Title	Status	Category	Related To	Modified Time	Created Time
111	Upload Attachment problem	Open	Big Problem	Asha	2008-10-19 17:42:46	2008-10-19 17:38:09
112	Individual Customization -M and RSS	In Progress	Small Problem	demovtiger	2008-10-19 17:43:18	2008-10-19 17:38:09
114	Import Error CSV Leads	Open	Small Problem	Taylor Dorothy	2008-10-19 17:44:23	2008-10-19 17:38:09
128	new ticket	Open	Big Problem	Asha	2008-10-20 11:02:59	2008-10-20 11:02:59

Closed Tickets

Ticket Id	Title	Status	Category	Related To	Modified Time	Created Time
126	test1	Closed	Big Problem	Asha	2008-10-20 10:46:57	2008-10-20 07:01:44

Quotes:

My Tickets	Knowledge Base	Contact	Account	Products	Quotes	Invoice	Documents
Quotes							Show <input type="button" value="All"/> <input type="button" value="Mine"/> <input type="button" value="All"/>
Quotes							
Quote Id	Subject	Quote No	Quote Stage	Valid Till	Total	Related To	
74	Prod_Quote	QUOTE1	Accepted	2007-09-21	160.000	Jones Barbara	
75	Cont_Quote	QUOTE2	Accepted	2007-10-29	270.000	Asha	
76	SO_Quote	QUOTE3	Accepted	2007-12-11	160.000	Taylor Dorothy	

My Tickets	Knowledge Base	Contact	Account	Products	Quotes	Invoice	Documents
Quotes							Show <input type="button" value="Mine"/> <input type="button" value="Mine"/> <input type="button" value="All"/>
Quotes							
Quote Id	Subject	Quote No	Quote Stage	Valid Till	Total	Related To	
75	Cont_Quote	QUOTE2	Accepted	2007-10-29	270.000	Asha	

My Tickets	Knowledge Base	Contact	Account	Products	Quotes	Invoice	Documents
Quotes							
Quotes							
Subject Cont_Quote		Quote No QUOTE2		Valid Till 2007-10-29		Potential Name 15	
Carrier UPS		Shipping		Tax Type individual		Quote Stage Accepted	
Discount Amount 10.000						Contact Name Asha	
						Sub Total 220.000	
						Total 270.000	
						Discount Percent 0.000	
						Account Name EDFG Group Limited	

Invoice:

My Tickets Knowledge Base Contact Account Products Quotes **Invoice** Documents

Invoices Show All Mine All

Invoice Id	Invoice No	Subject	Salerorder	Invoice Status	Total	Related To
89	INV1	vtiger_invoice201	SO_vt100usrpk	Created	4050.000	demovtiger
93	INV5	vendtl_inv214	SO_vendtl	Paid	8050.000	Asha

My Tickets Knowledge Base Contact Account Products Quotes **Invoice** Documents

Invoices Show Mine Mine All

Invoice Id	Invoice No	Subject	Salerorder	Invoice Status	Total	Related To
93	INV5	vendtl_inv214	SO_vendtl	Paid	8050.000	Asha

My Tickets Knowledge Base Contact Account Products Quotes **Invoice** Documents

Invoices Show Mine

Invoices	
Subject vendtl_inv214	Invoice Date 2008-10-21
Due Date 2008-10-21	Total 8050.000
Status Paid	Created Time 2008-10-19 17:38:08

Download & License Information

Documents:

My Tickets Knowledge Base Contact Account Products Quotes Invoice Documents

Documents Show All

Title	FileName	Created Time	Modified Time	Related To
test		2008-10-20 10:05:17	2008-10-20 10:05:17	demovtiger
aaa	developer.jpg	2008-10-20 19:40:14	2008-10-20 19:40:17	demovtiger
test	issue.JPG	2008-10-21 07:45:35	2008-10-21 07:45:42	Asha

My Tickets Knowledge Base Contact Account Products Quotes Invoice Documents

Documents Show Mine

Title	FileName	Created Time	Modified Time	Related To
test	issue.JPG	2008-10-21 07:45:35	2008-10-21 07:45:42	Asha

My Tickets Knowledge Base Contact Account Products Quotes Invoice Documents

Documents Show Mine

Documents	
File Type image/jpeg	File Size 75294
Download Type I	Created Time 2008-10-21 07:45:35
File issue.JPG	Note This is test Document
Modified Time 2008-10-21 07:45:42	Version
Active 1	Download Count 0

Knowledge Base :

Tickets	Knowledge Base	Contact	Account	Products	Invoice	Quotes	Documents
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in All

Knowledge Base

Category

- [General](#) (6)

Products

- [Vtiger Single User Pack](#) (0)
- [Vtiger 5 Users Pack](#) (0)
- [Vtiger 10 Users Pack](#) (1)
- [Vtiger 25 Users Pack](#) (0)
- [Vtiger 50 Users Pack](#) (0)
- [Double Panel See-thru Clipboard](#) (0)
- [abcd1234](#) (0)
- [Cd-R, CD Recordable](#) (0)
- [Sharp - Plain Paper Fax](#) (0)
- [Brother Ink Jet Cartridge](#) (0)
- [faq product](#) (3)

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- this is the second question?**
yes
- where is this coming from ?**
i believe from vtiger crm 510
- where is this coming from ?**
i believe from vtiger crm 510
- How to migrate data from previous versions to the latest version?**
the answer is null
- new file**
adding into more info
- A program is trying to access e-mail addresses you have stored in Outlook. Do you want to allow this? If this is unexpected, it may be a virus and you should choose No when trying to add Email to vitger CRM**
Published

Detail view of Knowledge base:

Knowledge Base

- Category
 - General (7)
- Products
 - Vtiger Single User Pack (0)
 - Vtiger 5 Users Pack (0)
 - Vtiger 10 Users Pack (1)
 - Vtiger 25 Users Pack (0)
 - Vtiger 50 Users Pack (0)
 - Double Panel See-thru Clipboard (0)
 - abcd1234 (0)
 - Cd-R CD Recordable (0)
 - Sharp - Plain Paper Fax (0)
 - Brother Ink Jet Cartridge (0)
 - faq_product (3)

Knowledge Base Title		FAQ Detail
Error message - please close all instances of word before using the vtiger word plugin. Do I need to close all Word and Outlook instances first before I can reopen Word and sign in?		
ANSWER : dont know		
Comments		
1	find answer?	Added on : 2008-10-22 14:07:43
Documents Related		
Title	FileName	Created Time
from acct demovtiger	vtlib_project_generinfunctions.txt	2008-10-23 06:40:19
faq from faq	query.txt	2008-10-23 07:38:46
from vtiger	g.pdf	2008-10-23 09:32:31

Name of document

attached file name