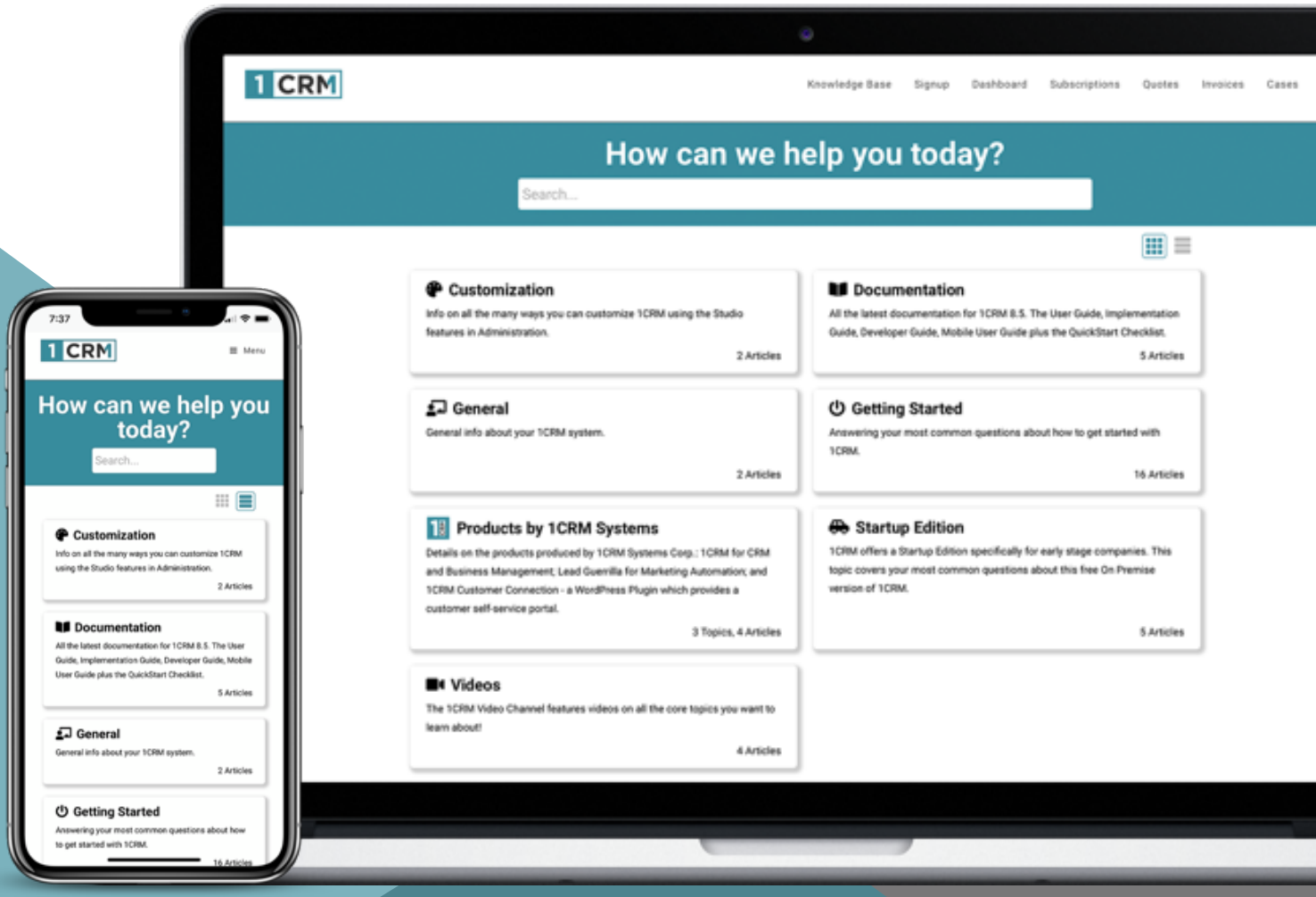
1CRM CUSTOMER CONNECTION

Customer Portal Plugin for WordPress



Background

A principal goal of any business should be to connect more closely with its customers. When you are in close contact with your clients, when it is easy for them to interact with you, and when this relationship consistently delivers for them over time - that's when you gain customer loyalty.

If you use a Content Management System (CMS) to create your website, and most organizations do, then you'll know that WordPress dominates that market. So when we set out to make a system that would let businesses connect with their clients easily, often, and intimately via their website, we needed to build it for the WordPress platform.

The *1CRM Customer Connection™* is a WordPress plugin that enables your clients to interact with your business at any time of day, all by themselves. Studies show this increases customer satisfaction, and reduces administrative costs - what's not to like?

You can implement this on your WordPress website by yourself using this Guide, or you can have us do it for you. Either way it allows your clients to connect with you in these ways:

- Login
- Get Help, by Searching a Knowledge Base
- Review and Create Service Cases and Software Bugs
- Review, Print and Approve Quotes
- Review Invoice and Payment History, Download Copy Invoices, Pay Invoices
- Interact on Projects - Upload & Download Documents, Check Progress
- Review and Update Their Contact Info
- Make GDPR Personal Information Requests
- Create and Manage Subscriptions

If you're excited to get these kinds of capabilities working for your organization, keep reading, or just drop us a line and we'll demonstrate what it can do for you!

Version 1.2, February, 2021. This document is subject to change without notice.

Disclaimer

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1.0 Welcome

The *1CRM Customer Connection* is a customer self-service portal for WordPress, which links to your 1CRM core CRM system. If you have a WordPress-based website, your WordPress administrator can install the Customer Connection WordPress plugin, configure how you want to present the portal features to your clients, and your website will gain a wide range of features that enable your clients to work with you more easily and efficiently.

What's a customer self-service portal? It's just a website, or a set of features within a larger website, that enables customers to privately and securely perform useful transactions from simple account updates to paying bills, approving quotes, searching for support information, booking appointments, managing support tickets, exchanging documents and more. It enhances customer relationships by providing complete 24×7 access to up-to-date information.

If you have a website built using WordPress, and if your business would benefit from the kinds of features mentioned above, then the *1CRM Customer Connection* is something you should have a look at. You can see a demo system running here.

1.1 Additional Documentation

The 1CRM Customer Relationship and Business Management (CRBM) system offers extensive documentation for the installation and use of its various components. Click on any link below to download that document, or click here to see all our 1CRM documentation:

- User Guide
- Mobile User Guide
- Implementation Guide
- Developer Guide

2.0 Plugin Installation & Administration

2.1 Installing the Plugin

2.1.1 Before You Start

If you are using wordpress.com to host your website, then you cannot install plugins.

We often get reports from wordpress.com users saying that they can't see the plugins menu in their WordPress dashboard. It is because wordpress.com has many limitations.

You cannot install plugins on wordpress.com unless you upgrade to their business plan. On the other hand, you can install any plugin you want on a self hosted WordPress website right out of the box.

2.1.2 Installing the WordPress Plugin

You begin by downloading the *1CRM Customer Connection* plugin here: Download Plugin

Note: The 1CRM Customer Connection is commercial software which must be licensed. While you can download and install the plugin freely, it will only function properly when connected with a 1CRM Professional or Enterprise Edition system version 8.6 or later, which must include a subscription to the Customer Connection portal. The 1CRM Customer Connection requires PHP 7.1 or later to function properly, and WordPress itself recommends a minimum of PHP 7.

Next, you need to login to your Wordpress site as an administrator and install the plugin. Within the WordPress admin area visit the *Plugins* page and click on the *Add New button*.

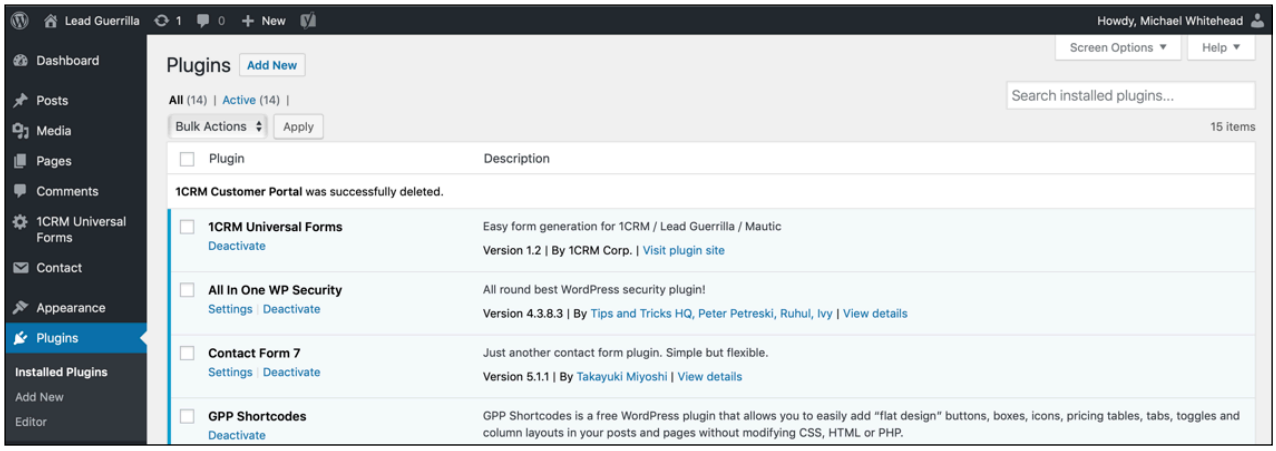


Figure 1: WordPress Administrator: Add New Plugin

After that, click on the *Upload Plugin* button at the top of the page.

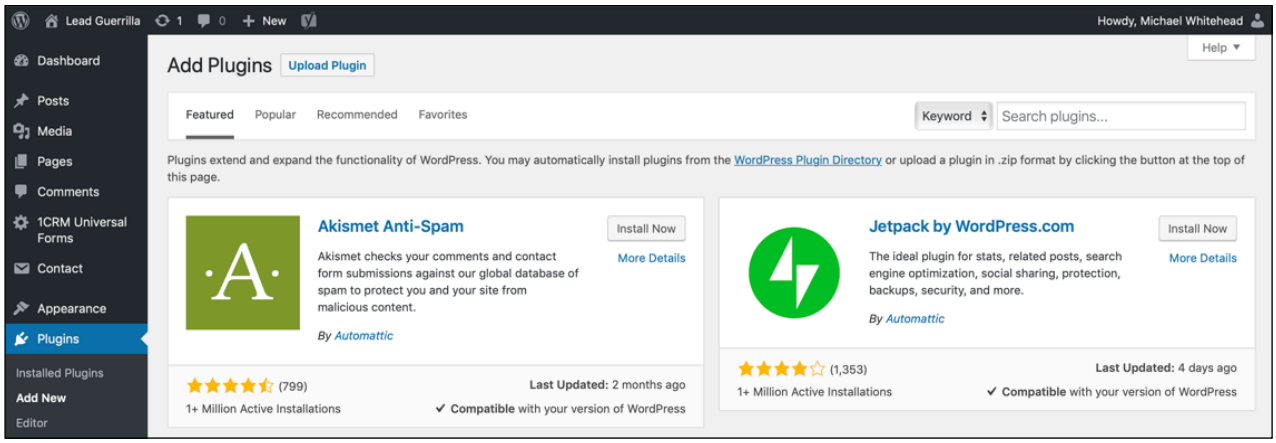


Figure 2: WordPress Administrator: Upload Plugin

This brings you to the plugin upload page. Click on the *Choose File* button and select the plugin file you downloaded earlier.

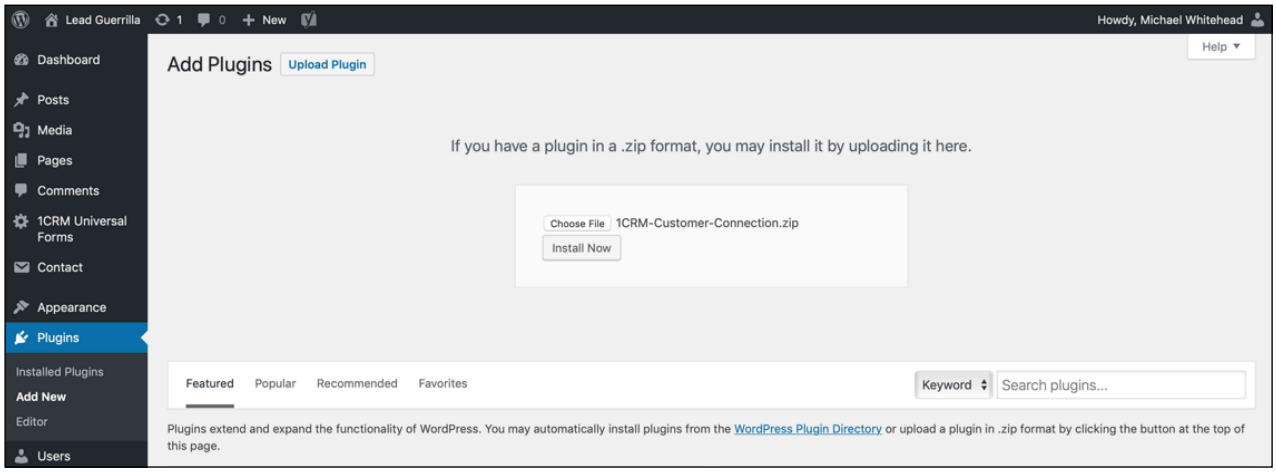


Figure 3: WordPress Administrator: Install Plugin

After you have selected the file, you need to click on the *Install Now* button.

WordPress will now upload the plugin file from your computer and install it for you. You will see a success message like this after the installation is finished.

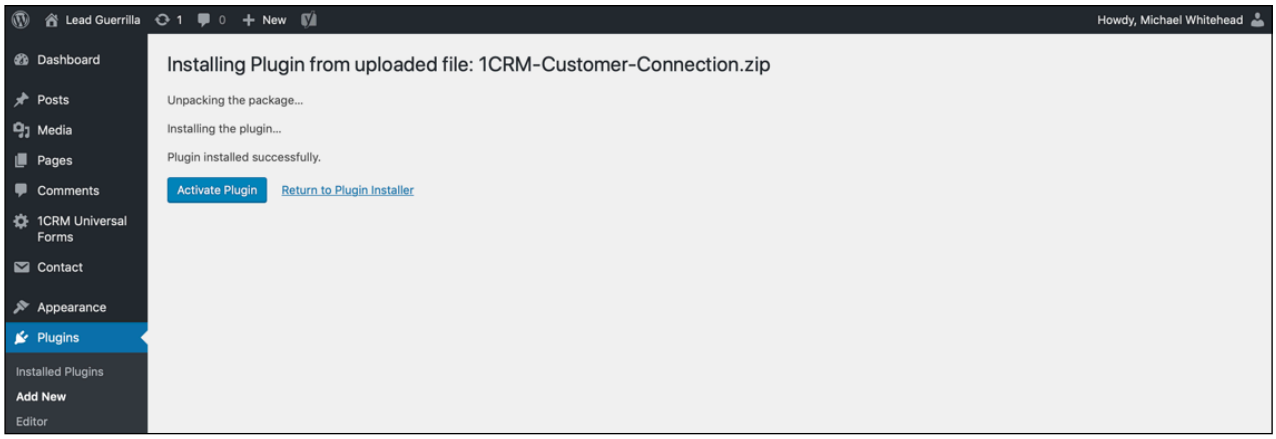
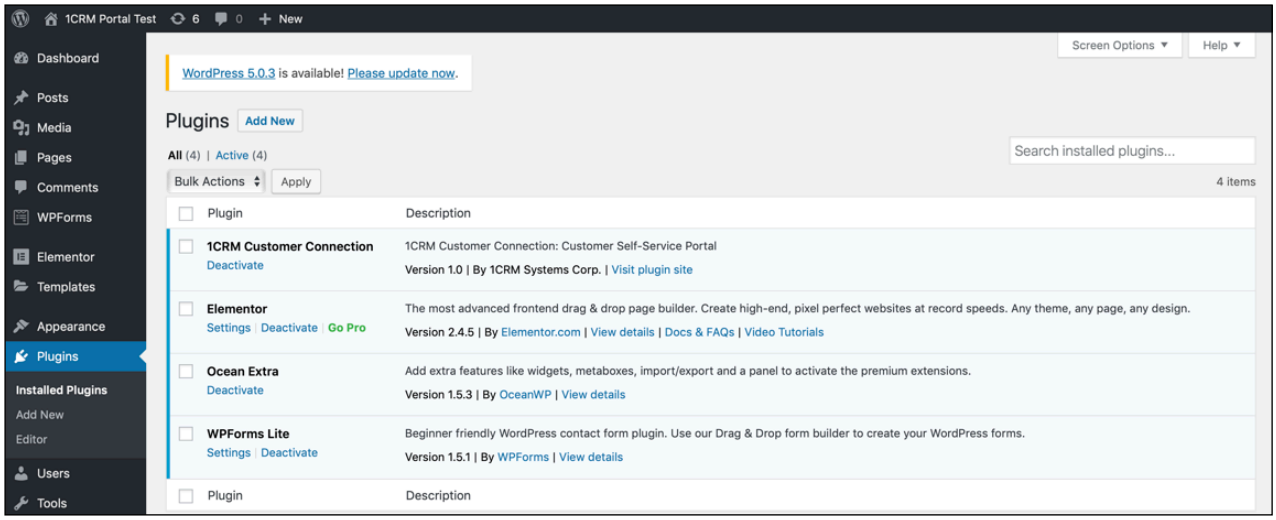


Figure 4: WordPress Administrator: Plugin Installed

Once installed, you need to click on the *Activate Plugin* button to start using the plugin.

Once you do that, you can see the 1CRM Customer Connection on your list of installed plugins:



As well, you can see the 1CRM Customer Connection configuration menu options on the left side in the Admin menus:

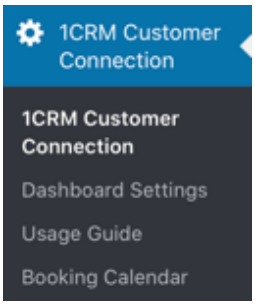


Figure 6: WordPress Administrator Menus for 1CRM Customer Connection

2.2 Plugin Configuration

2.2.1 Setting up the API Link with 1CRM

1. In 1CRM, enable the REST API (see 1CRM Implementation Guide Section 7.11.1). You may also choose whether or not to *Allow API calls via insecure connections* (http://). We recommend you don't.

2. In 1CRM, go to *API Clients* in Admin (see 1CRM Implementation Guide Section 7.11.2), and create a new API Client. Give it a name, and set *Enabled Grant Types* to *Client Credentials*. Make sure it is *Enabled*, and select a user. Requests from the 1CRM Customer Connection will be executed on behalf of the selected user. Save the record, then click the button provided to change the *API Secret* (see figure below). Take a note of the *API Secret* and the *Client ID*.

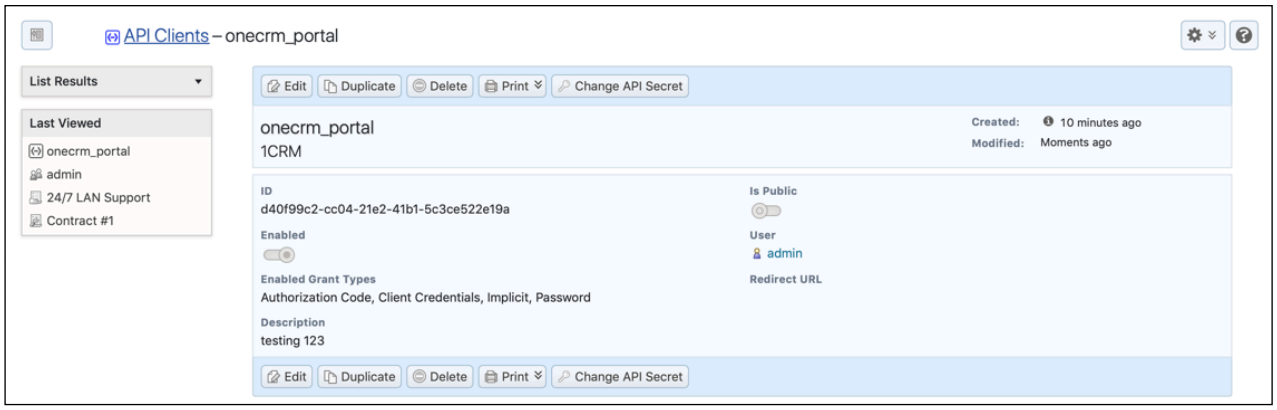


Figure 7: Creating an API Client in 1CRM

Now select the 1CRM Customer Connection in the WordPress Admin menu, and enter the URL of your 1CRM system (with **`/api.php`** appended, to address the 1CRM REST API), as well as the *API Client ID* and *API Secret* you noted in the previous step (not the example values you see in the Figure below!). Click on *Save Settings* when you're done.

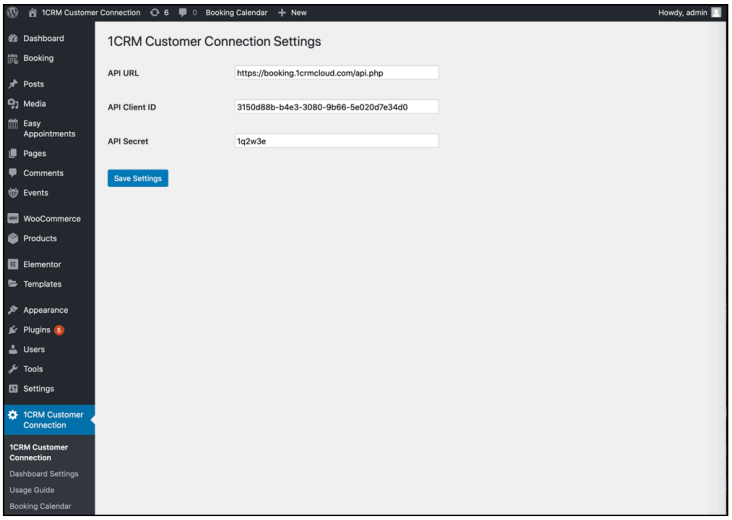


Figure 8: Configuring the API Link to 1CRM

2.3 Adding Customer Connection Features to Your Website

Once you have your *1CRM Customer Connection* plugin installed the next step is to add the portal features you want to the pages of your website. The plugin provides a number of *shortcodes* - special tags that you insert into your pages to display information, as well as a *widget*. The complete set of shortcodes and their descriptions are listed below, and you can also see them using the Usage Guide menu option in the plugin:

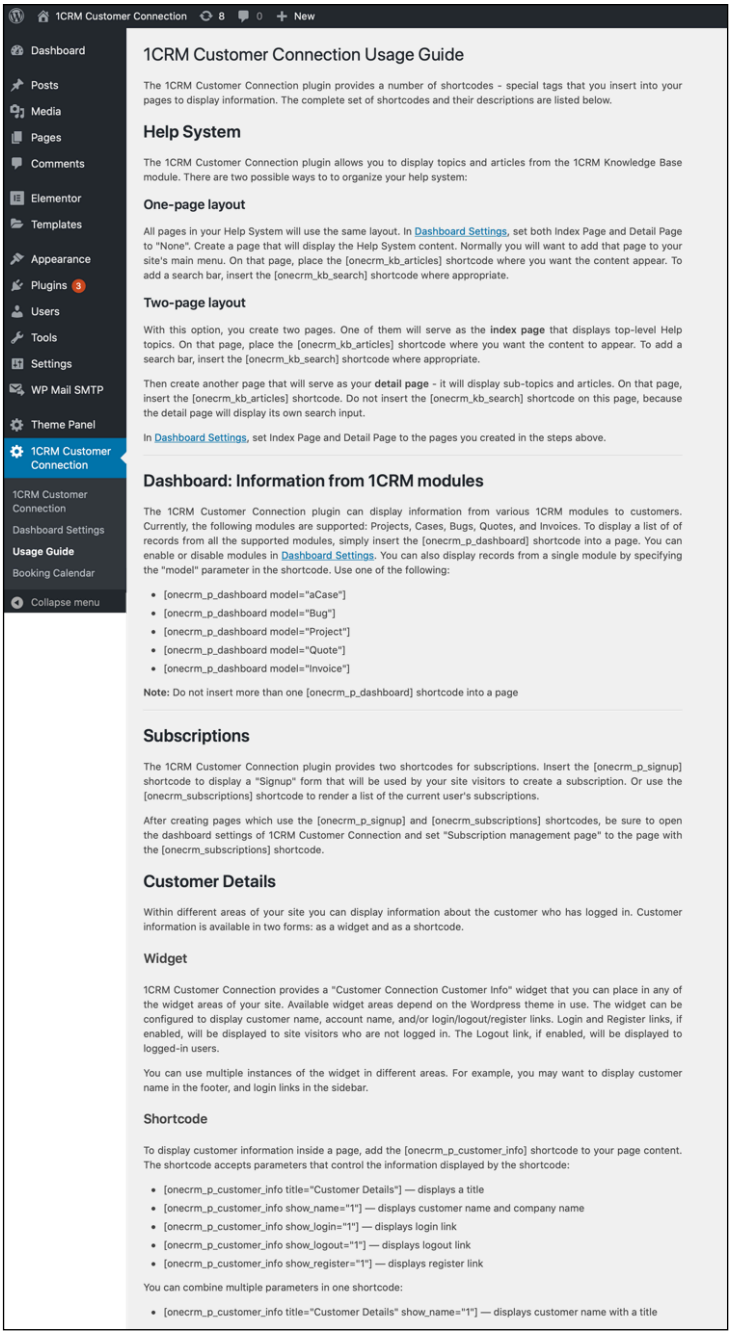


Figure 9: 1CRM Customer Connection - Usage Guide

2.3.1 Customer Help KnowledgeBase

The 1CRM Customer Connection plugin allows you to display topics and articles from the 1CRM Knowledge Base module. There are two possible ways to to organize your help system:

One-page layout

All pages in your Help System will use the same layout. In *Dashboard Settings*, set both *Index Page* and *Detail Page* to *None*. Create a page that will display the Help System content. Normally you will want to add that page to your site's main menu. On that page, place the `[onecrm_kb_articles]` shortcode where you want the content appear. To add a search bar, insert the `[onecrm_kb_search]` shortcode where appropriate.

Two-page layout

With this option, you create two pages. One of them will serve as the *index page* that displays top-level Help topics. On that page, place the `[onecrm_kb_articles]` shortcode where you want the content to appear. To add a search bar, insert the `[onecrm_kb_search]` shortcode where appropriate.

Then create another page that will serve as your *detail page* - it will display sub-topics and articles. On that page, insert the `[onecrm_kb_articles]` shortcode. Do not insert the `[onecrm_kb_search]` shortcode on this page, because the detail page will display its own search input.

In *Dashboard Settings*, set *Index Page* and *Detail Page* to the pages you created in the steps above.

Customize Help KnowledgeBase Appearance

You have a wealth of settings available with which to customize the appearance of Help KnowledgeBase articles within the portal. As you can see in Figure 11 below this includes options for custom CSS code, as well as a range of foreground and background colour settings, drop shadows, borders, etc ..

2.3.2 The Customer Connection Dashboard

The 1CRM Customer Connection plugin can display information from various 1CRM modules to customers. Currently, the following modules are supported: Projects, Cases, Bugs, Quotes and Invoices. (Opportunities, Leads and Accounts may be displayed for Partner use.) To display a list of of records from all the supported modules, simply insert the `[onecrm_p_dashboard]` shortcode into a page.

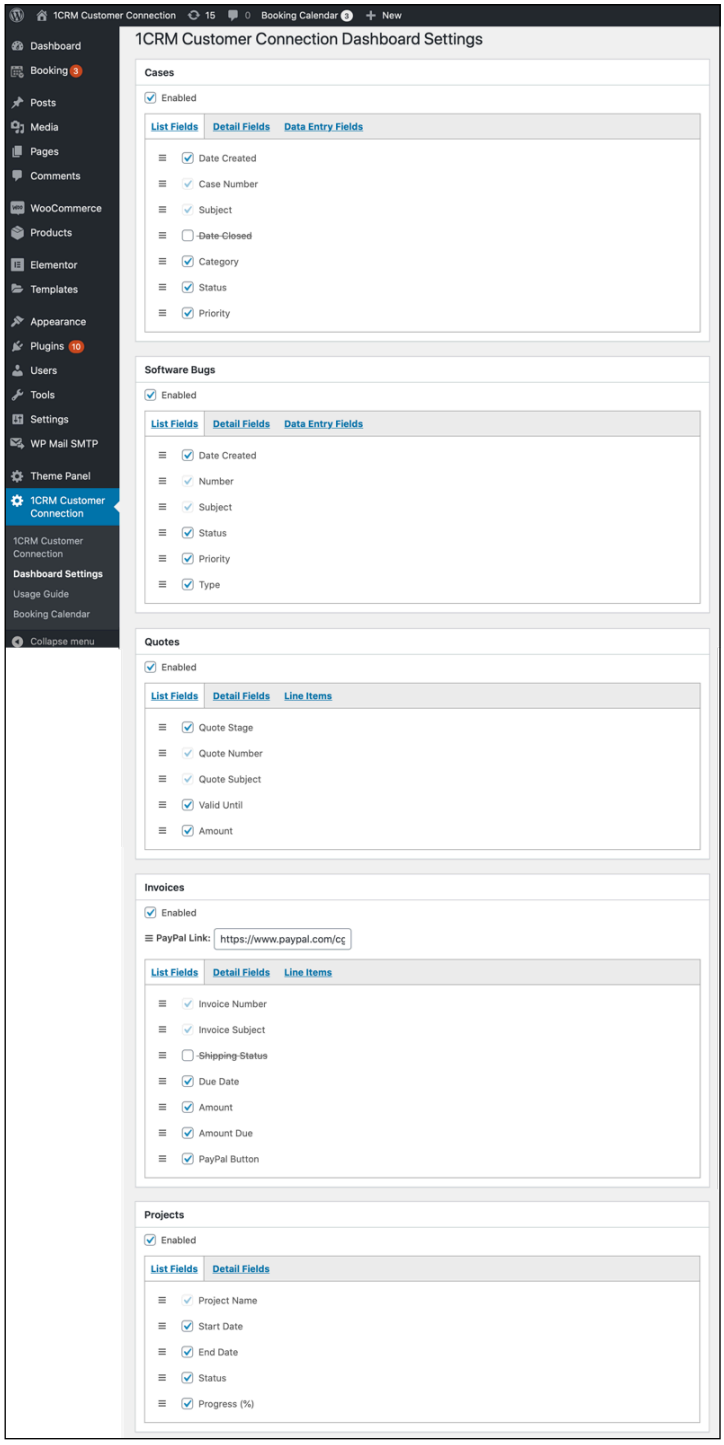


Figure 10: 1CRM Customer Connection Dashboard Settings (Top)

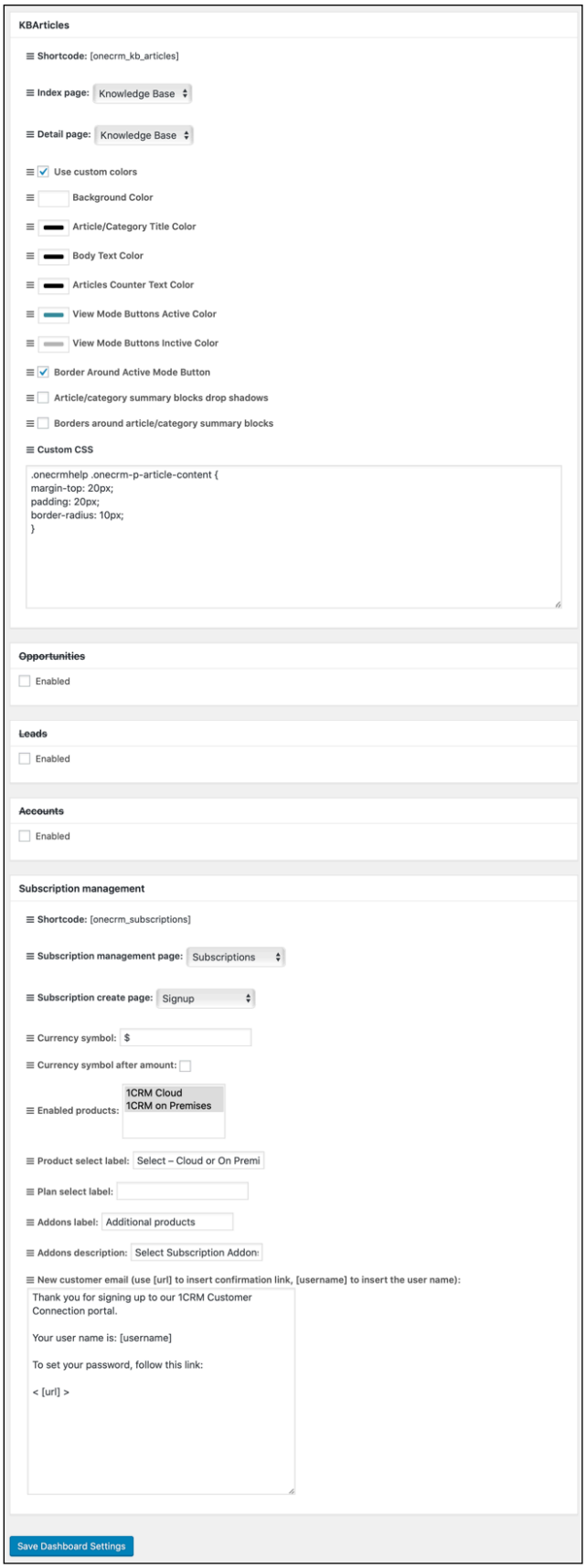


Figure 11: 1CRM Customer Connection Dashboard Settings (Bottom)

Using the *Dashboard Settings* you can enable or disable each of the modules supported in the Dashboard. You can also choose which fields to display on the module *list views* shown in the portal, and which to show in *detail views*, using the checkboxes provided. Use the hamburger icon ≡ on the left to drag fields up and down in the list, to change the order in which they will be presented.

Service Cases and Software Bugs also have a tab for Data Entry Fields - these fields will be available to the user when they choose Create New on the Dashboard, to create a new Case or Bug.

Invoices include controls to optionally show a PayPal button for each open invoice in the portal. Clients can click on the button to pay the invoice. See section 2.3.6 for more information.

2.3.3 Individual 1CRM Modules

You can display information from a single 1CRM module by specifying the "model" parameter in the dashboard shortcode. Use one of the following:

- `[onecrm_p_dashboard model="aCase"]`
- `[onecrm_p_dashboard model="Bug"]`
- `[onecrm_p_dashboard model="Project"]`
- `[onecrm_p_dashboard model="Quote"]`
- `[onecrm_p_dashboard model="Invoice"]`

Note: `Do not insert more than one [onecrm_p_dashboard] shortcode into a page.`

Subscriptions

The 1CRM Customer Connection plugin provides two shortcodes for subscriptions. Insert the `[onecrm_p_signup]` shortcode to display a *Sign up* form that will be used by your site visitors to create a subscription. Use the `[onecrm_subscriptions]` shortcode to render the list view for the current user's subscriptions

After creating the pages with `[onecrm_p_signup]` and `[onecrm_subscriptions]` shortcodes, make sure to open *Dashboard Settings* and set the *Subscription management page* value to the page with the `[onecrm_subscriptions]` shortcode.

2.3.4 Customer Login, Logout and Menu Options

Customer Details

Within different areas of your site you can display information about the customer who has logged in. Customer information is available in two forms: as a widget and as a shortcode.

Widget

1CRM Customer Connection provides a "Customer Connection Customer Info" widget that you can place in any of the widget areas of your site. Available widget areas depend on the Wordpress theme in use. The widget can be configured to display customer name, account name, and/or login/logout/register links. Login and Register links, if enabled, will be displayed to site visitors who are not logged in. The Logout link, if enabled, will be displayed to logged-in users.

You can use multiple instances of the widget in different areas. For example, you may want to display customer name in the footer, and login links in the sidebar. In the Figure below we see two instances of the widget side by side in the footer. The one on the left is configured to show login/ logout/register links, while the one on the right is configured to show the customer information.

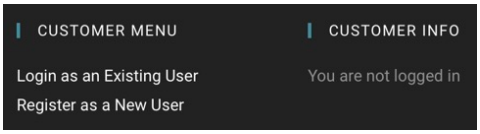


Figure 12: 1CRM Customer Connection - Customer Info Widget

In the next Figure we see the same two instances of the widget after the customer has logged in.

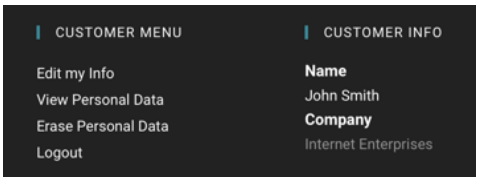


Figure 13: 1CRM Customer Connection - Customer Info Widget

Notice that the logged-in view shows an option to *Edit my Info*. This allows the portal user to edit the information you hold about them in your CRM. And the *View Personal Data* option allows the logged-in user to see and print to PDF their personal data, as defined under the European *General Data Protection Regulations* (GDPR). Similarly *Erase Personal Data* allows you to choose which items of your personal data you'd like erased from the CRM holding your data.

Note: Personal data may be required to continue ongoing services for clients, such as subscriptions, so they should use common sense in terms using the Erase personal Data option.

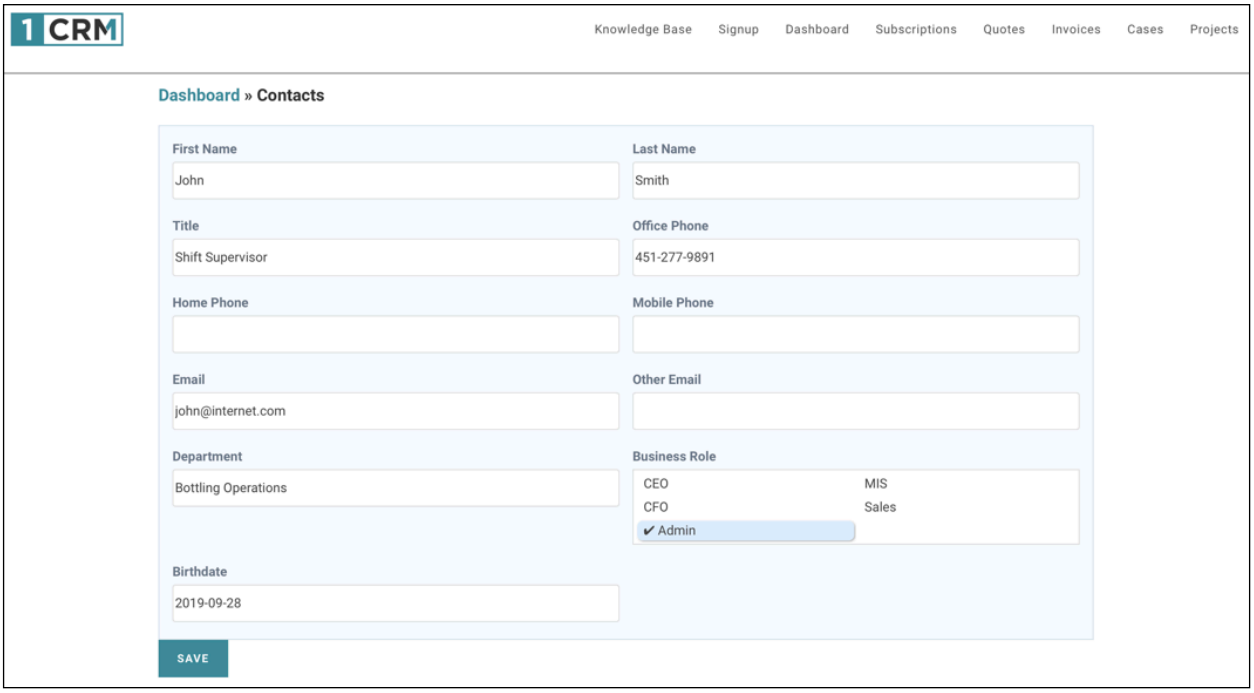


Figure 14: 1CRM Customer Connection - Edit my Info

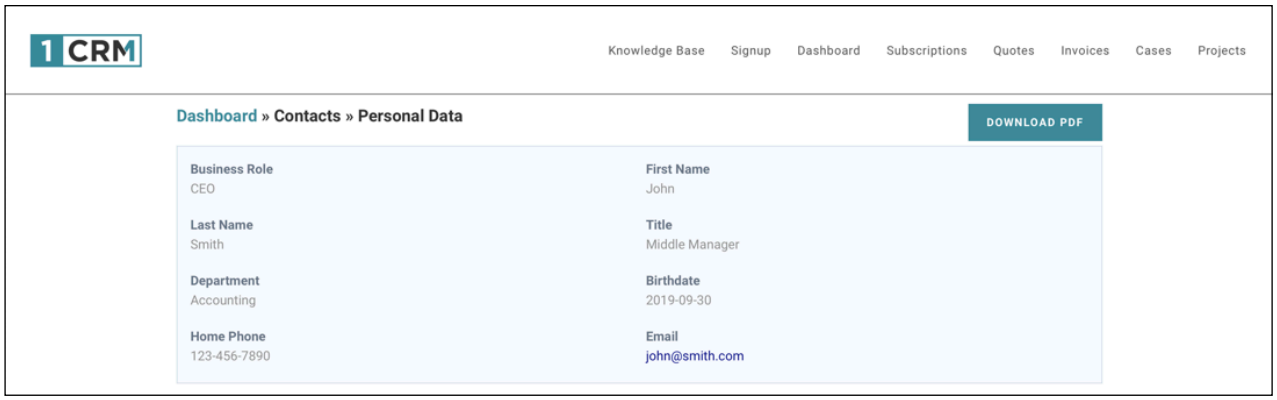


Figure 15: 1CRM Customer Connection - View Personal Data

Figure 16: 1CRM Customer Connection - Erase Personal Data

Shortcode

To display customer information inside a page, add the [onecrm_p_customer_info] shortcode to your page content. The shortcode accepts parameters that control the information displayed by the shortcode:

- `[onecrm_p_customer_info title="Customer Details"]` — displays a title
- `[onecrm_p_customer_info show_name="1"]` — displays customer name and company name
- `[onecrm_p_customer_info show_login="1"]` — displays login link
- `[onecrm_p_customer_info show_logout="1"]` — displays logout link
- `[onecrm_p_customer_info show_register="1"]` — displays register link

You can also combine multiple parameters in one shortcode:

- `[onecrm_p_customer_info title="Customer Details" show_name="1"]` — displays customer name with a title

2.3.5 Booking Calendar Plugin Integration

The 1CRM Customer Connection portal includes an integration with the WordPress plugin Booking Calendar. This plugin enables website visitors to book and pay for:

- Accommodations (bed & breakfast, cottages, hotel rooms, houses, apartments etc).
- Equipment rentals (cars, bikes, computers, tools, etc).
- Client scheduling (photographers, lawyers, beauty salons, spas, massage therapists).
- Meeting scheduling (coaching, phone advice).
- Event scheduling (conference, course, fitness centre, yoga class, gym).
- Patient scheduling (doctor, dentists, clinic, medical).
- Or any other service which offers reservations for specific day(s).

Note: This integration requires the Business Small or Medium paid edition of this plugin (or higher). This integration is compatible with Booking Calendar version 8.7.2 and WordPress version 5.3.2, or later. You will also need to have an active subscription to 1CRM Enterprise or Professional Edition, Release 8.6 or later.

Once you have installed and configured that plugin within WordPress (see video here), if you click on the Booking Calendar option of the Customer Connection menu you will see the screen below:

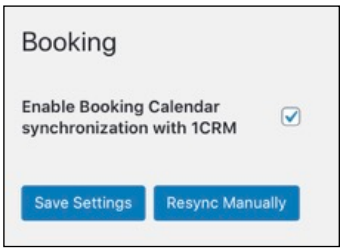


Figure 17: Booking Calendar Synchronization

After you have enabled the synchronization with the Booking Calendar plugin, appointments created in the plugin will be synchronized into 1CRM as Meetings with the checkbox *Booking Appointment* enabled (you can see an example in Figure 19, below, which has the entire new panel of Booking Appointment fields highlighted). In addition, any new Contact or Account information provided will also be synchronized into the CRM, as will any Invoices created. And all these items will be linked to each other for ease of understanding in the CRM.

This sync is one-way, Booking Calendar to 1CRM. Some other sync features include:

- If the client changes the booking time or date using your website, the Meeting in your CRM will be updated.
- If the client removes the booking using your website, the Meeting in your CRM will be deleted.
- If the client changes the Resource booked using your website, the *Booking Resource* field of the 1CRM Meeting will be updated.
- Bookings may be approved or deleted in WordPress, and the *Booking Status* in 1CRM updates appropriately.

- When using the *wpadmin* features for the Booking Calendar, if a Note is added to a Booking, that Note will be added as a Note in 1CRM, linked to the Meeting record.
- When editing the Contact for a Booking in WordPress, updating any info other than the email address causes the appropriate update in 1CRM. Changing the email address, or using a different Contact in WordPress causes a new Contact to be linked to the Meeting in 1CRM.

The WordPress scheduler is used to run the synchronization software within the portal which performs the various tasks described above which synchronize data to 1CRM. If you wish you can also use the *Resync Manually* button to perform a manual sync independent of the WordPress scheduler.

Within 1CRM, the Meetings list view screen has a filter on it for *Bookings Only*. Click this to show only Booked Appointments on the Meetings list view. You can also search in the text box for *Booking* to show these special meetings.

On the 1CRM Calendar, using the Day, Week or Month tabs, and the Activities mode, you have a checkbox for Bookings, which will enable you to see just the Meetings which are Booking Appointments on your calendar.

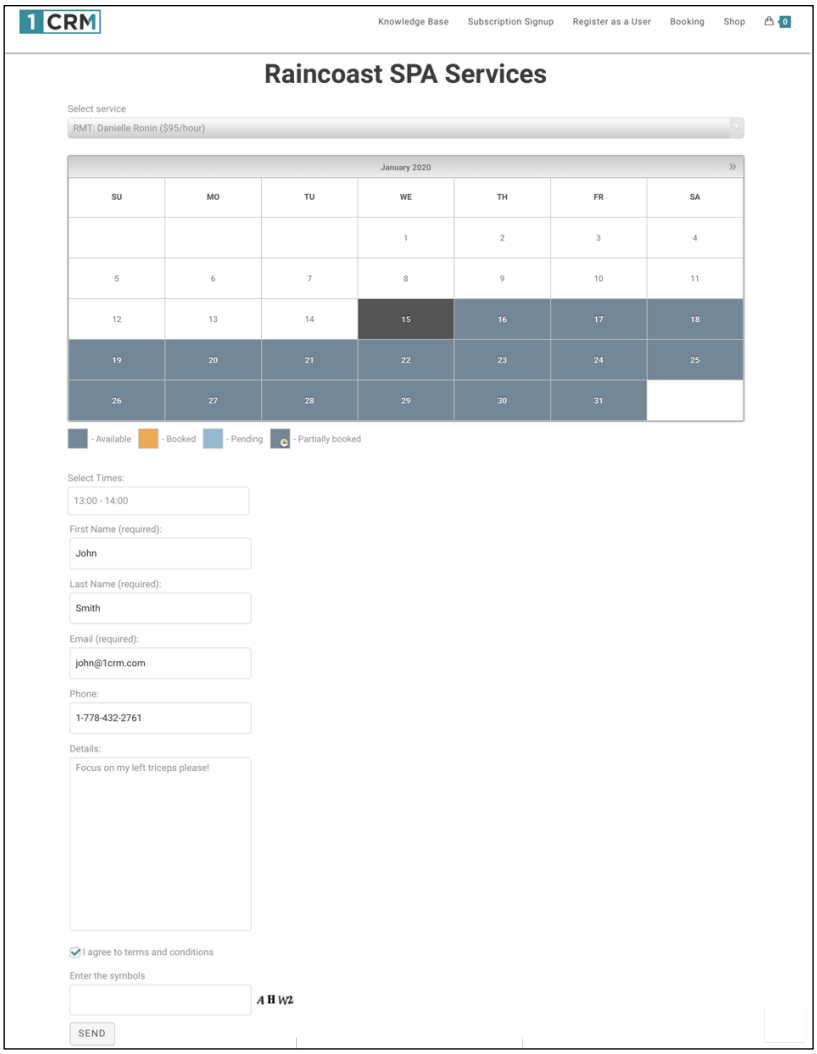


Figure 18: Booking Calendar Plugin for WordPress

We see below a sample Meeting record created in 1CRM via the Customer Connection portal's Booking Calendar integration. Notice the Booking Appointment toggle is enabled, to indicate that this Meeting is a Booking. This enables the display of several more data fields relevant only to Booking Appointments, such as *Booking Status* and *Payment Status*.

Also notice the Account name format - Lastname, Firstname. This is the default format for Account names created when the portal user provides no company name when creating their WordPress user. Finally note the *Related to* value - which links to the Invoice created for the Booking, and the Resources sub panel which shows the Resource booked for this appointment. (***Note:*** Resources created within the Booking Calendar plugin and then used for a Booking are created automatically within 1CRM if they do not already exist there.)

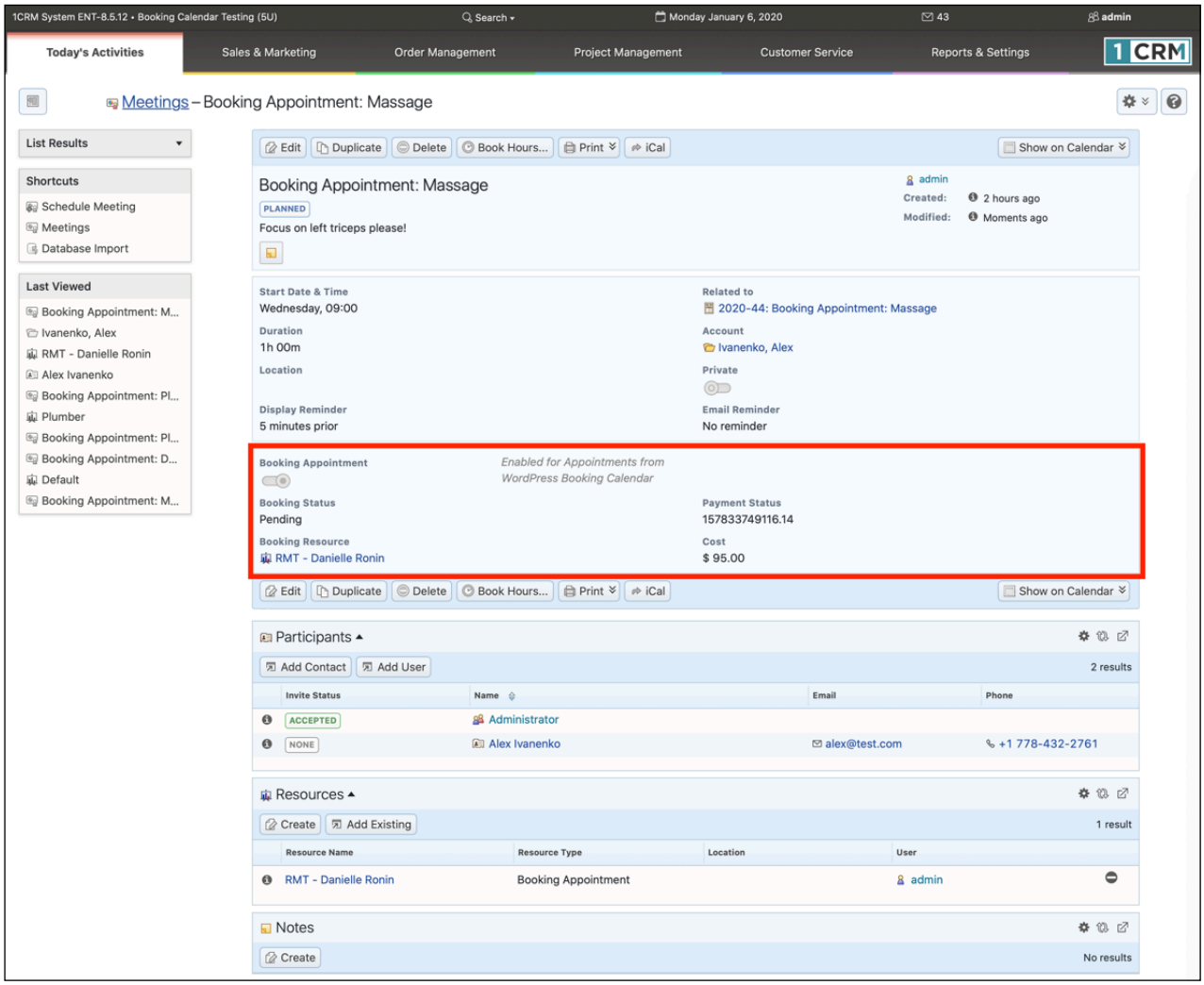


Figure 19: Meeting Created in 1CRM from Booking Calendar Integration

All meetings created in the CRM will be assigned to the 1CRM User you selected in section 2.2.1 above, when creating the new API client for your Customer Connection portal.

Depending on the nature of the Bookings you are accepting via the Booking Calendar plugin, your Resources might actually be people - such as Massage therapists, Spa Technicians, Plumbers, or

field service engineers. (Or they might be Airbnb properties, Meeting Rooms, or other resources that aren't people, in which case you can ignore this section!)

If your Resources are people, more specifically employees who login to your 1CRM system, then you will find it almost essential that new Meetings created via the Booking Calendar integration should be assigned to those specific 1CRM Users, so they can see all their appointments in their Calendar. In the Figure below you can see how your 1CRM Administrator can define Workflows to reassign new Booking-type Meetings to the appropriate Users. Each employee will need a Workflow like the one shown above.

Basically the Workflow says: When a new Meeting is Created, and if it is a Booking Appointment, and if the Booked Resource is Employee A, then change the *Assigned To* value for that Meeting to Employee A, so they know the Meeting is for them and can see it in their Calendar.

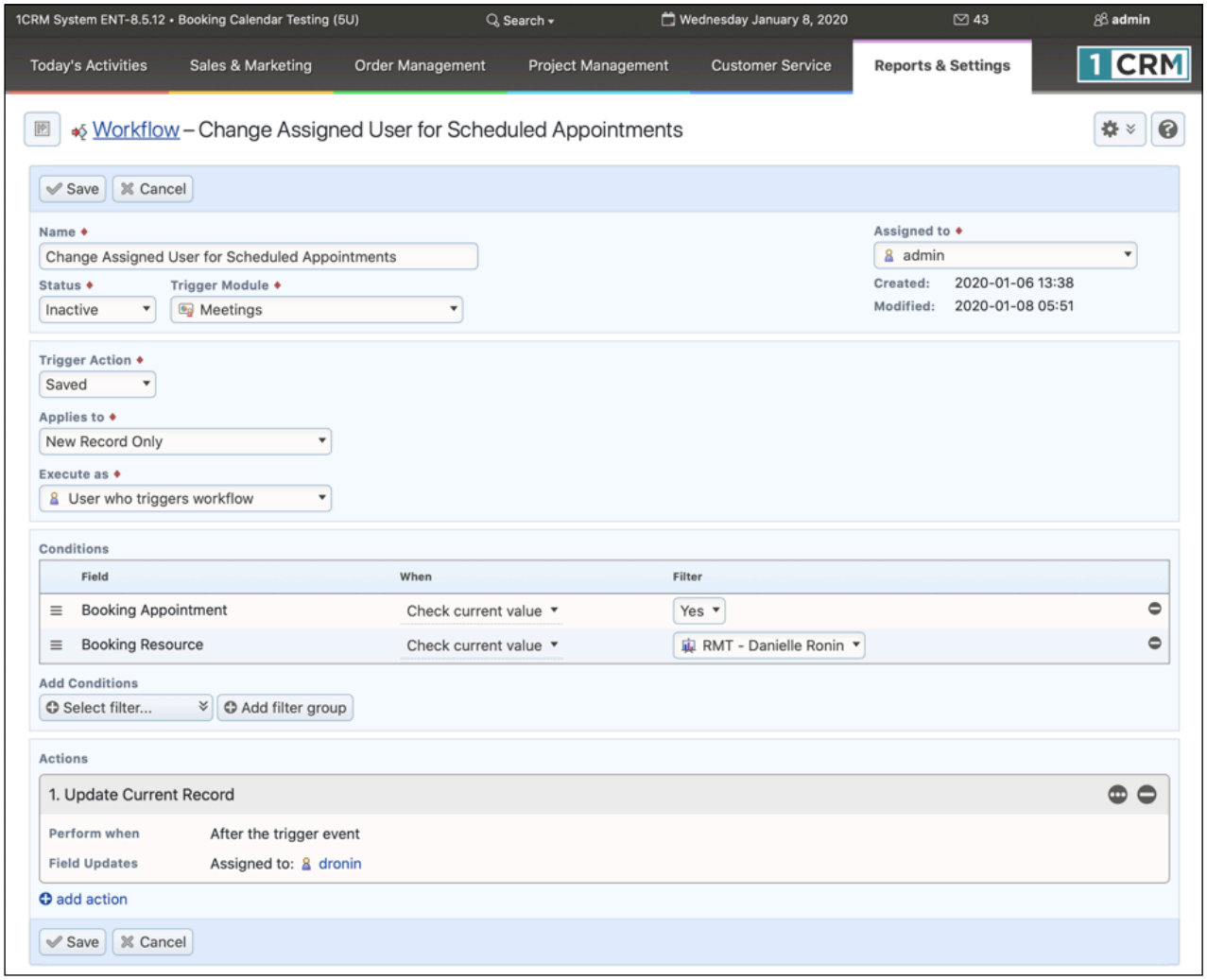


Figure 20: Reassigning Meetings via Workflow in 1CRM

2.3.6 Adding a PayPal Button to Pay Invoices

The 1CRM Customer Connection portal offers the ability to include PayPal payment buttons for open invoices. It is configured using these controls:

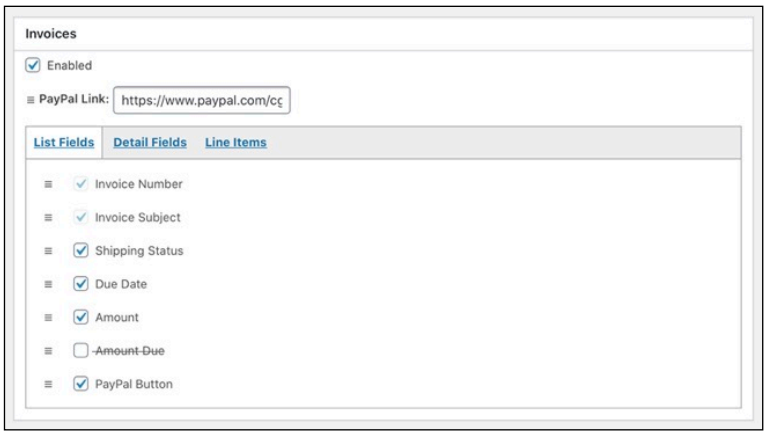


Figure 21: Adding a PayPal Button to Invoices

The PayPal link is the same link you can add inside 1CRM, to add PayPal buttons to an Invoice PDF to be sent to clients. To generate this link, in your PayPal account, create a simple website *Buy Now* Saved Button with no item or pricing information. Then click the Email tab and copy the link and paste it here in the PayPal link field, then Save. This link should be of the format: `https://www.paypal.com/cgi-bin/webscr?cmd=_s-xclick&hosted_button_id=BUTTON_ID_HERE` .

Once you have added the PayPal Link, then check the PayPal button field - you can check it for List Fields, Detail Fields or both. Here are examples of Invoices list view and detail view to show what the button looks like:

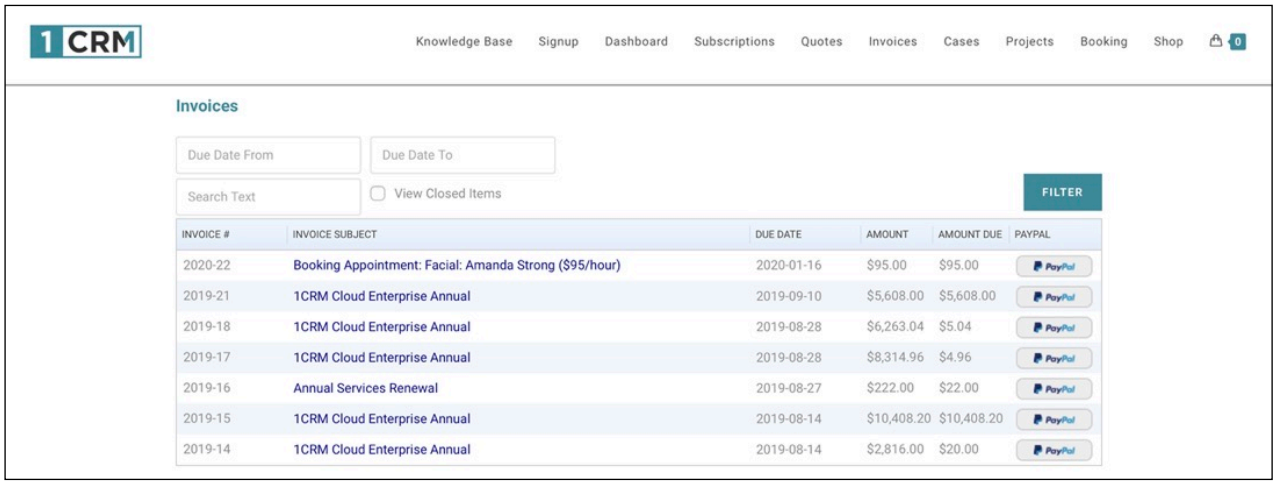


Figure 22: Invoice List View with PayPal Buttons

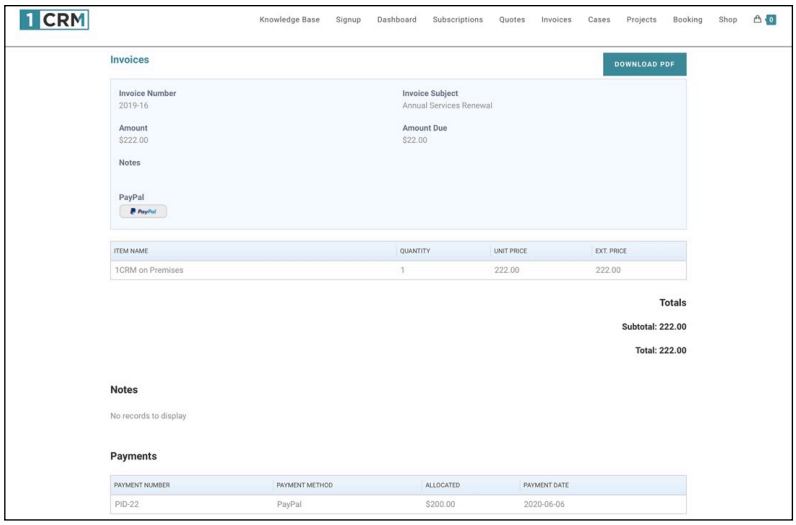


Figure 23: Invoice Detail View with PayPal Button

When your client clicks on the PayPal button, they will see a PayPal payment window like this:

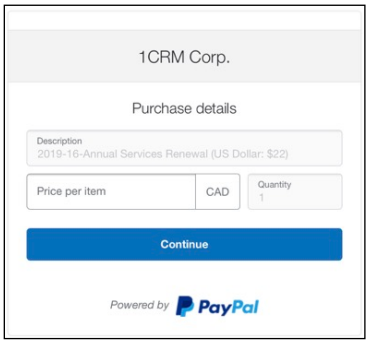


Figure 24: PayPal Payment Popup Window

The description of the item in this popup is set to include your invoice number and subject, as well as the amount due (and its currency). Your client simply enters the amount they wish to pay, and clicks on *Continue*. They will then continue to a screen such as the one below, and complete the payment. (Note the option to pay by Credit Card - no PayPal account required.)

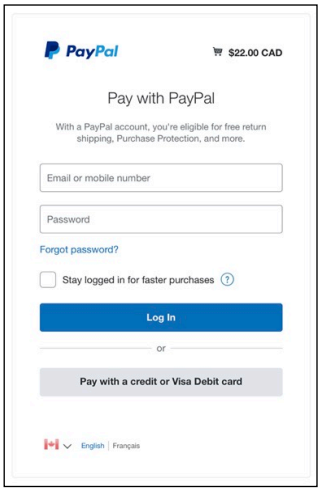


Figure 25: PayPal Payment Process

3.0 The User Experience

3.1 What the Casual Visitor Sees

A casual visitor is someone who is on your website but has not logged in. These visitors may see the Help KnowledgeBase information, but may not see the Dashboard or information from individual modules.

3.2 Customer Login & Profile Update

Once a visitor has logged in and been recognized as a client, the Customer Connection portal will display information to them for which they are authorized. This includes:

- Cases: Cases for which the user's CRM Contact is the Primary Contact on the Case.
- Bugs: Bugs for which the user's CRM Contact is the Primary Contact on the Software Bug.
- Projects: Projects for the Account which is the primary Account for the user's CRM Contact
- Quotes: Quotes for the Account which is the primary Account for the user's CRM Contact
- Invoices: Invoices for the Account which is the primary Account for the user's CRM Contact
- Subscriptions: Subscriptions for the Account which is the primary Account for the user's CRM Contact

A new visitor will need to register by creating a Portal user. This Portal user (actually, a WordPress user) will be linked to their Contact record in the 1CRM system linked to the Portal.

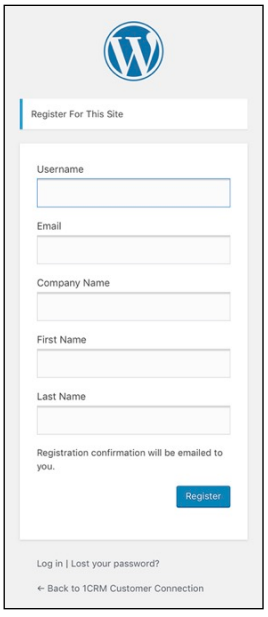


Figure 26: 1CRM Customer Connection - User Registration

Once completed, the registration form above will create a WordPress user. It will also create a new Contact and Account in the linked CRM. If the email address provided matches that of an existing CRM Contact, then no new Contact and Account is created, and the WordPress user is simply linked to the existing Contact/Account in the CRM.

A visitor who has already registered simply needs to login. The login process requires the visitor to click on the link *Login as an Existing User*:

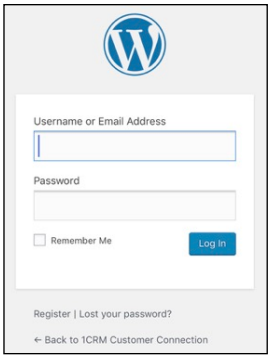


Figure 27: 1CRM Customer Connection - Login as an Existing User

Once registered and logged in a Portal user can update their own personal information inside the 1CRM system, or perform GDPR functions to request to see or erase their personal information in the linked CRM. These functions will appear on the Customer Menu offered by the Customer Info widget in an updated portal release coming soon:

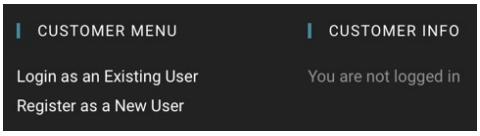


Figure 28: 1CRM Customer Connection - Updating Contact Information

3.3 Customer Help KnowledgeBase

If you have the 1CRM Customer Connection installed on a WordPress site the Help KnowledgeBase capability within it will look something like the Figure below:

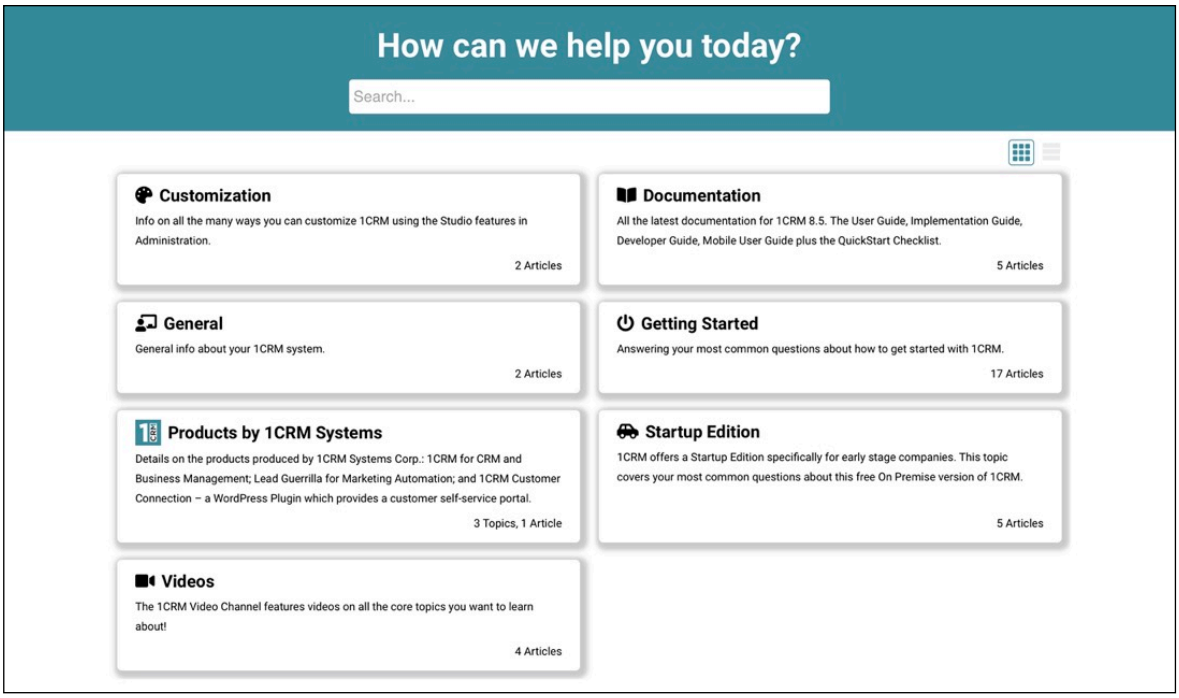


Figure 29: 1CRM Customer Connection - Help System

Note: If there are Documents or Notes linked to Help Articles they will be accessible by customers in the portal if the Article is displayed there.

Portal visitors can navigate the Help system by clicking on Topics or Articles. A breadcrumb trail is displayed at the top left, as seen below. A control at the top right is available to select grid or list view format.

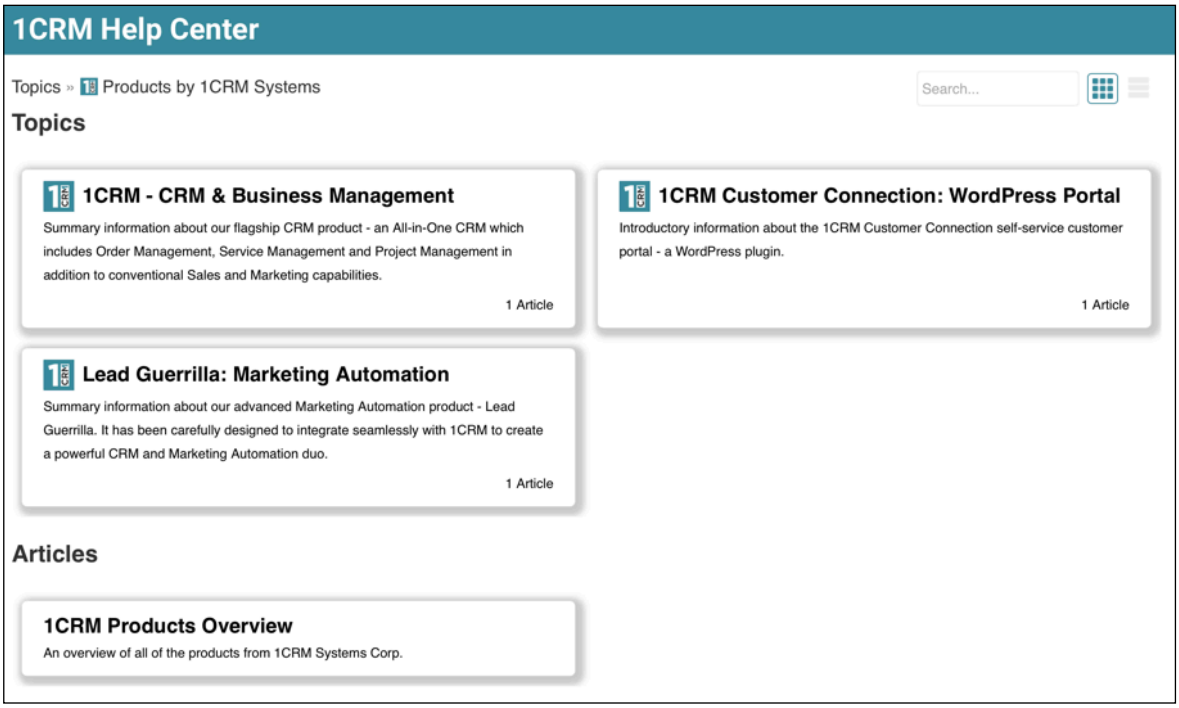


Figure 30: 1CRM Customer Connection - Navigating the Help System

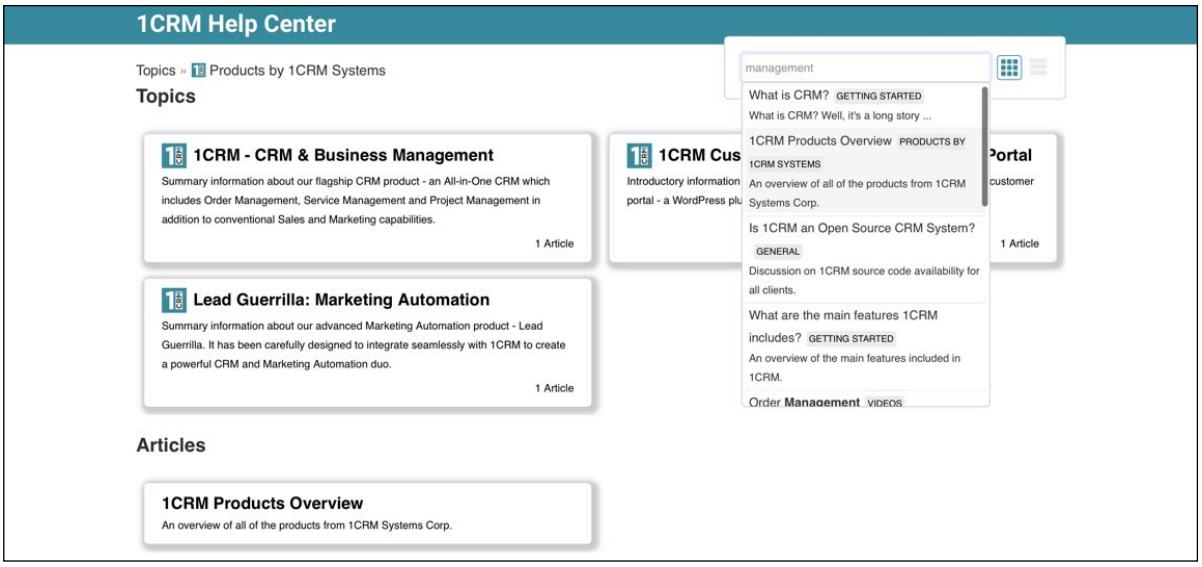


Figure 31: 1CRM Customer Connection - Searching the Help System

As shown above, users can also click in the Search box and get dynamic feedback on matches as they enter their search text. The results are shown in a scrollable list, with each entry showing the Article subject, the Topic it falls under, and the first portion of the Article Summary text. Simply click on any result in the list to read that Article.

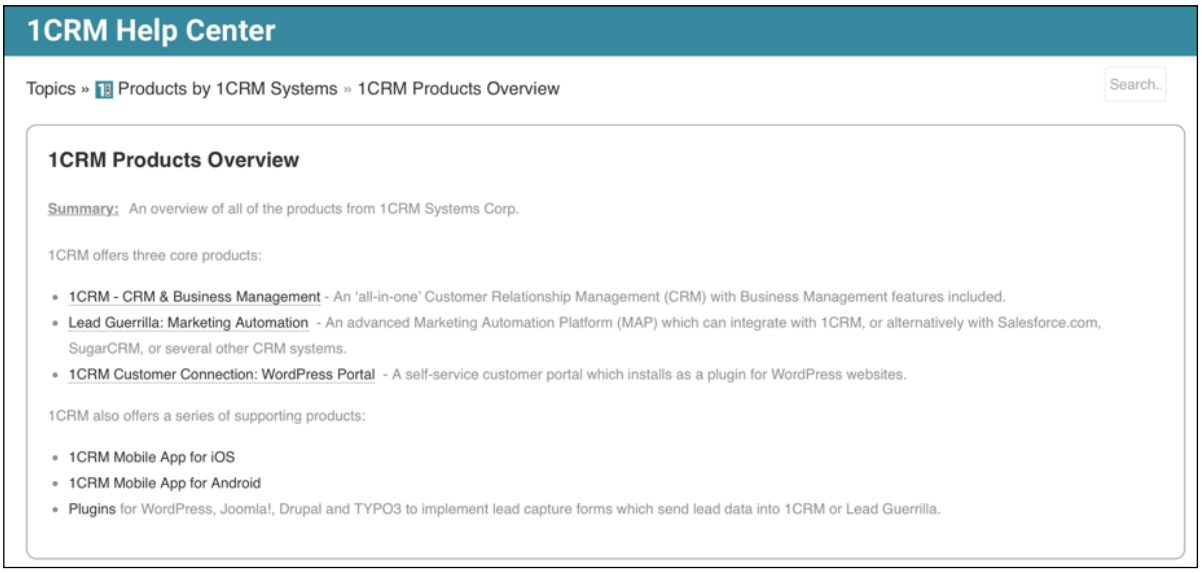


Figure 32: 1CRM Customer Connection - Reading an Article in the Help System

3.4 The Customer Connection Dashboard

The Dashboard will be displayed as several lists of information from the modules selected in Dashboard Settings (see Section 2.3.2), similar to the Figure below.

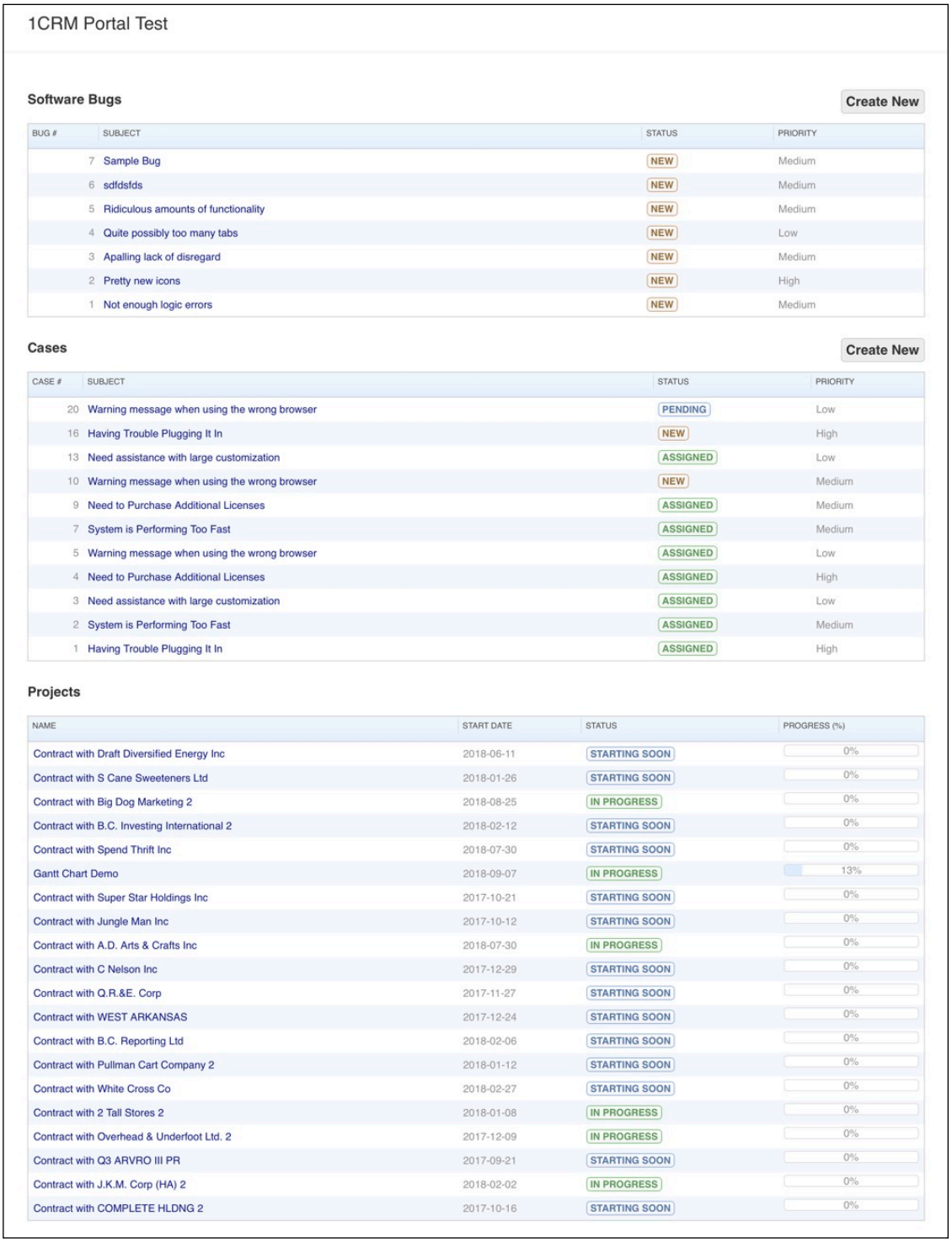


Figure 33: 1CRM Customer Connection - Dashboard

Users can click on a section title such as Cases, Bugs or Projects to see a list of just those items, or they can click on any item from any of the lists shown to see more detailed information:

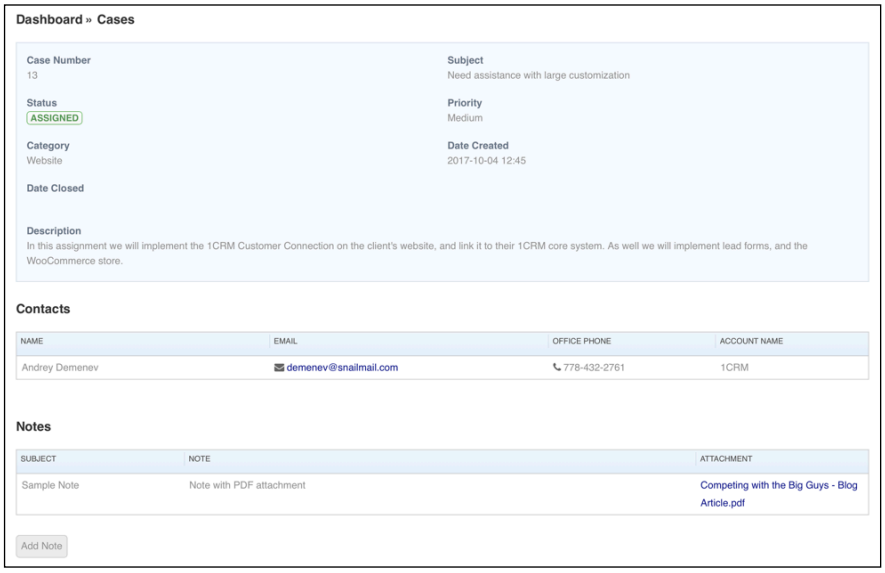


Figure 34: 1CRM Customer Connection - Viewing a Case

The Add a Note button may be used to add a Note to a Case, Bug or Project. These Notes may include an uploaded file. Users may download file attachments from any Note linked to a Case, Bug or Project.

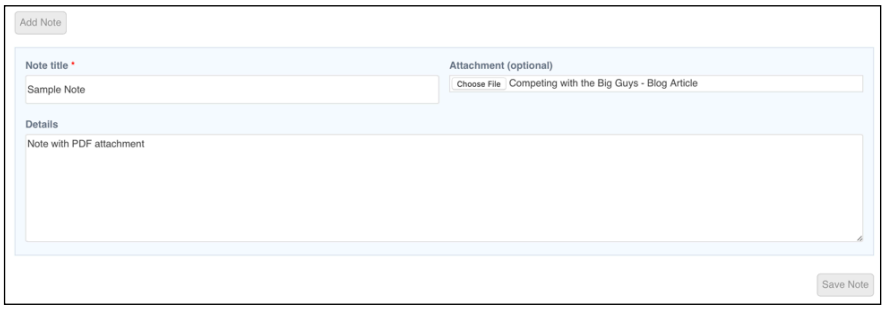


Figure 35: 1CRM Customer Connection - Adding a Note

Users may also use the *Create New* buttons provided on the Dashboard to add new Software Bugs or Service Cases.

3.5 Customer Support Cases

Portal users may view a list of service Cases, select a Case to see more detailed information, add a Note to a Case, or create a new Case. Example screens are shown above.

In Figure 34 above notice the breadcrumb trail at the top left. In `Dashboard » Cases` you can click on `Dashboard` to go all the way back to the full Dashboard view, or simply click on `Cases` to return to the Cases list view from the Cases detail view.

3.6 Project Tracking & Interaction

Portal users may view a list of Projects, select a Project to see more detailed information or add a Note to a Project.

Example screens are shown below. You can see an example of pagination in a list view.

Figure 36: 1CRM Customer Connection - Projects List

The Project detail view will show any Contacts, Project Tasks or Notes related to the Project, and allows the visitor to download files attached to Notes.

Visitors may use the *Add Note* button to add a note to the Project, and optionally may upload a file attachment with that note.

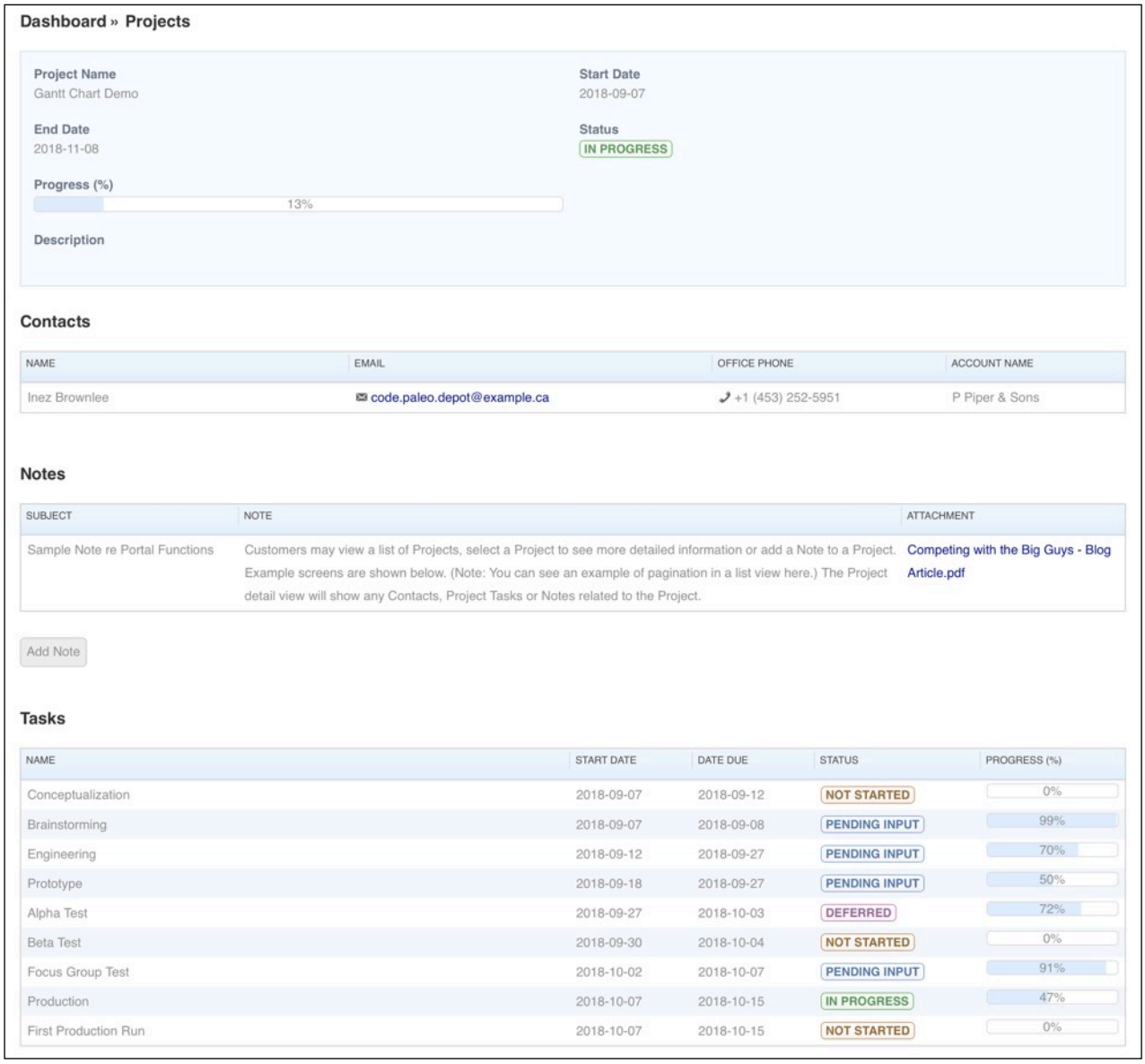


Figure 37: 1CRM Customer Connection - Project Detailed Info

In the Figure above notice the breadcrumb trail at the top left. In `Dashboard » Projects` you can click on `Dashboard` to go all the way back to the full Dashboard view, or simply click on `Projects` to return to the Projects list view from the Project detail view.

3.7 Software Bug Reports

Portal users may view a list of Bugs, or select a specific Bug to see more detailed information.

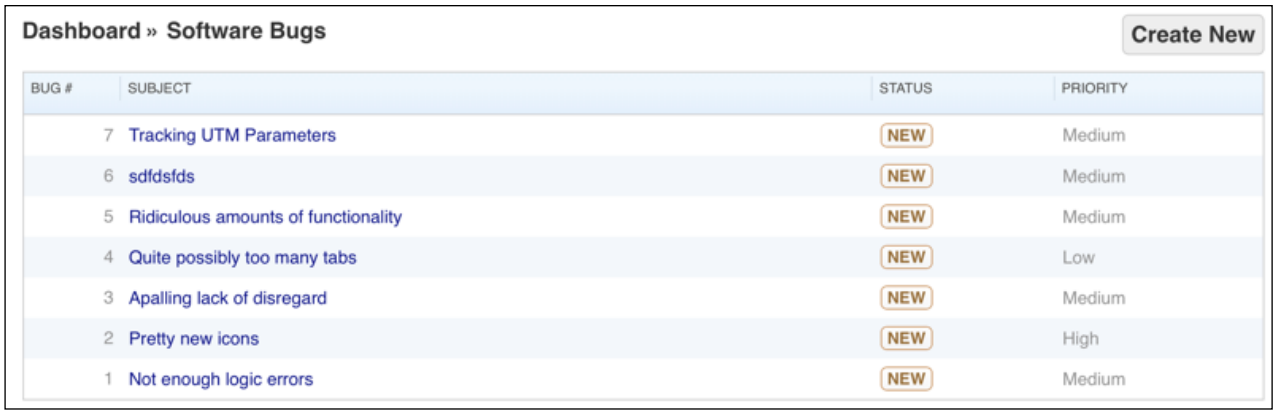


Figure 38: 1CRM Customer Connection - Bug List View

The Bug detail view will show any Notes related to the Bug, and allows the visitor to download files attached to Notes.

Visitors may use the *Add Note* button to add a note to the Bug, and optionally may upload a file attachment with that note.

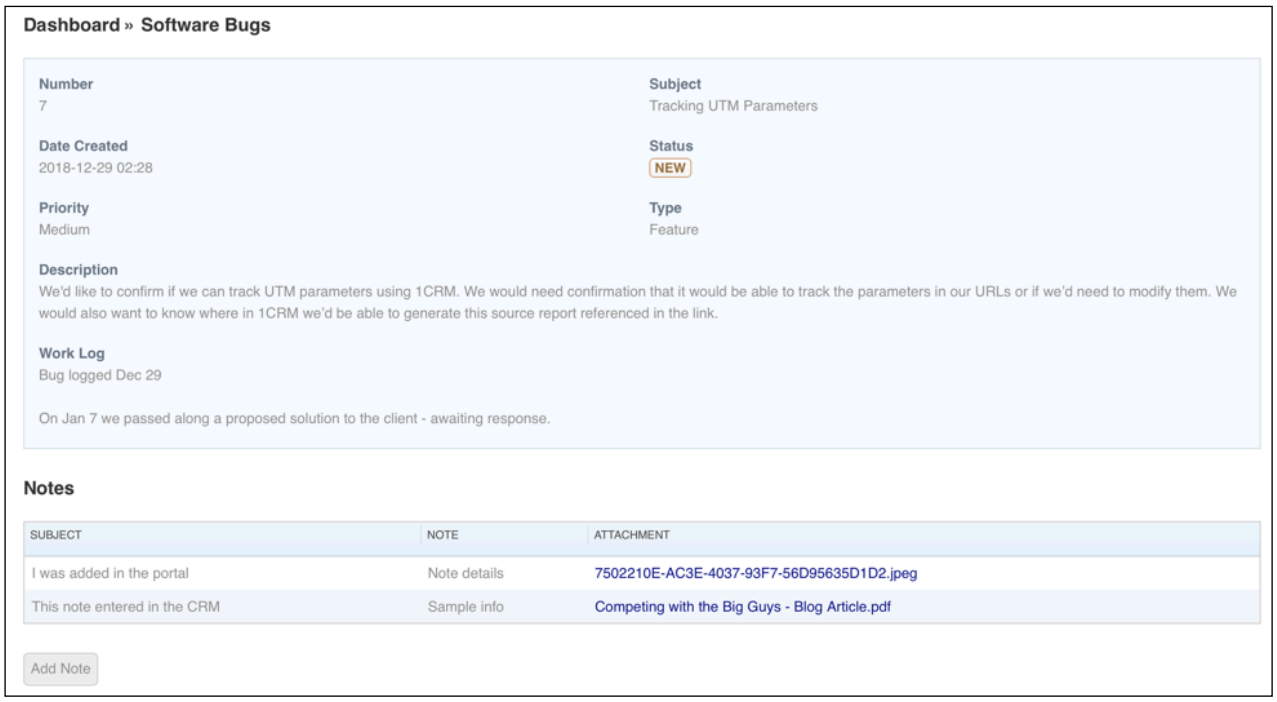


Figure 39: 1CRM Customer Connection - Bug Detailed Info

3.8 Subscription Management

Portal users may view a list of Subscriptions, Create a new Subscription, or select a specific Subscription to see more detailed information, by clicking on the *Edit* link to the right of it.

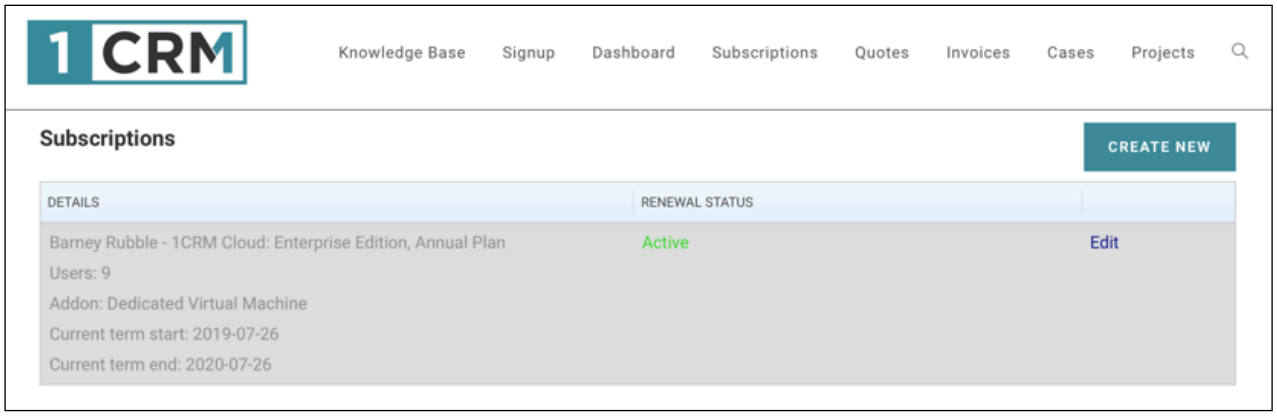


Figure 40: 1CRM Customer Connection - Subscription List View

The Subscription edit view allows the customer to make changes to their subscription.

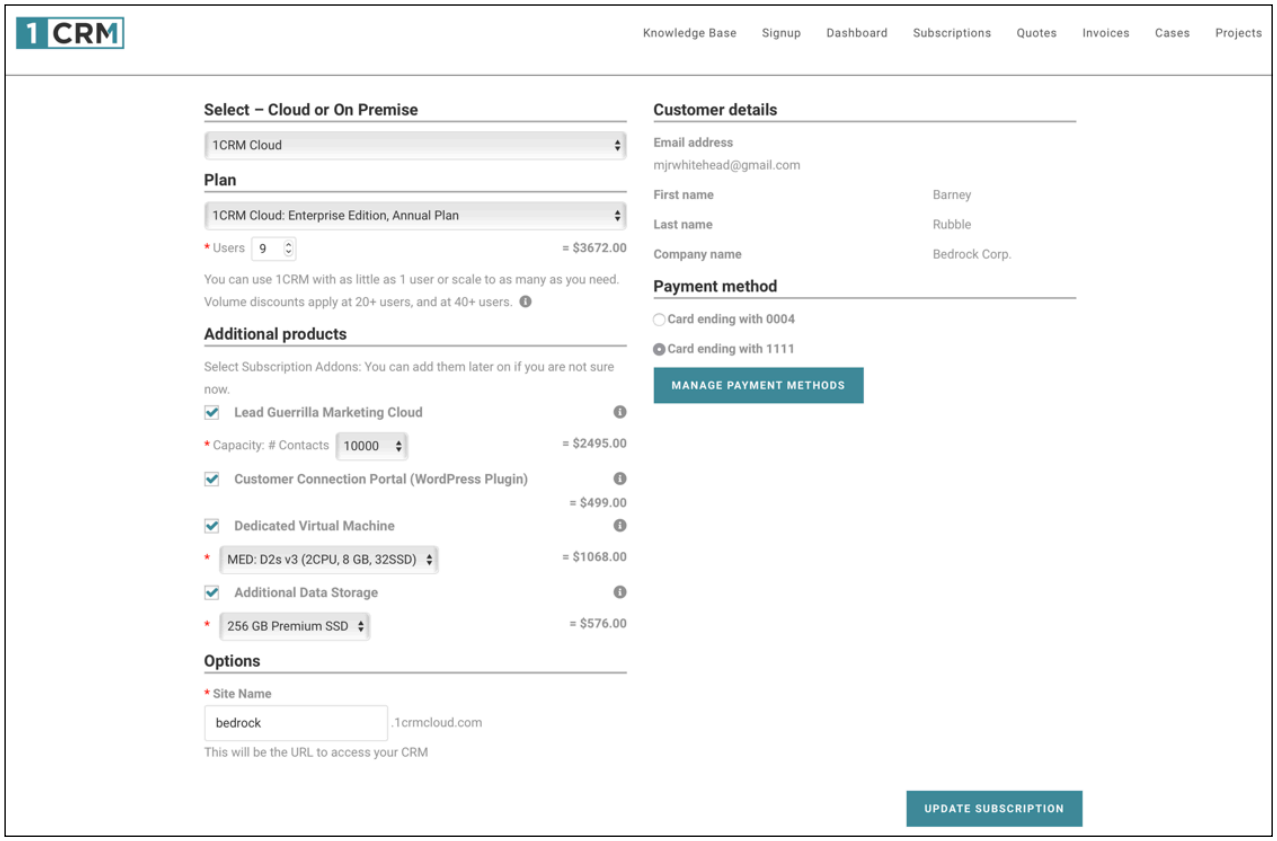


Figure 41: 1CRM Customer Connection - Subscription Detailed Info

If a portal visitor who is not logged in chooses the Signup menu option to sign up for a new subscription, the workflow goes like this (the 1crm.com Signup form is used as an example):

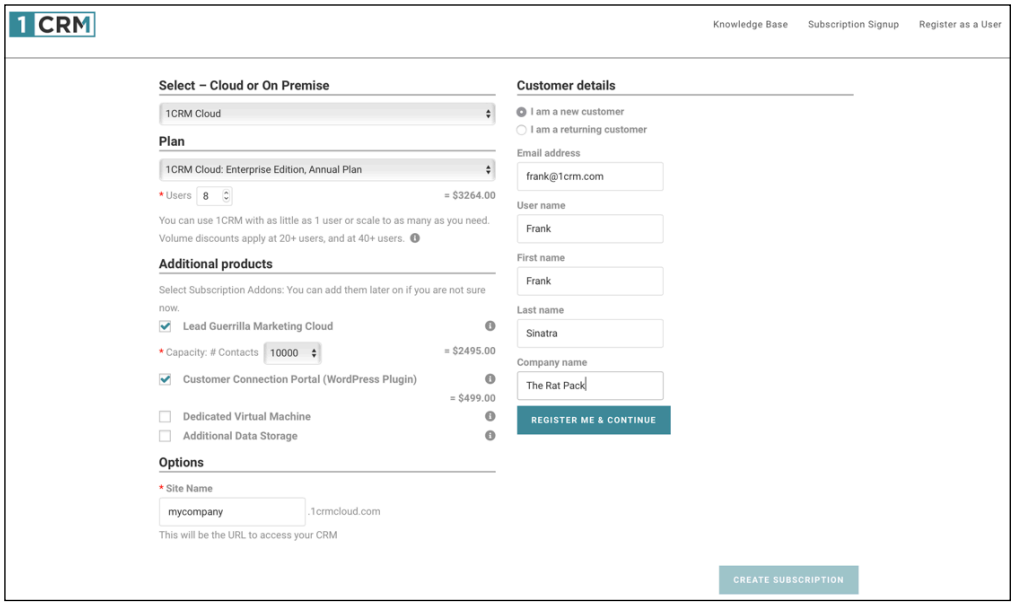


Figure 42: 1CRM Customer Connection - Subscription by Unregistered Visitor, Part 1

The client chooses the details of their subscription - the Product, Plan and Addons - and specifies any Options (such as site name in our case). Then the client selects *I am a New Customer*, and provides their email address, user name, first and last name, and company name - and clicks on *Register Me and Continue*. (Duplicates of user names or email addresses are rejected.)

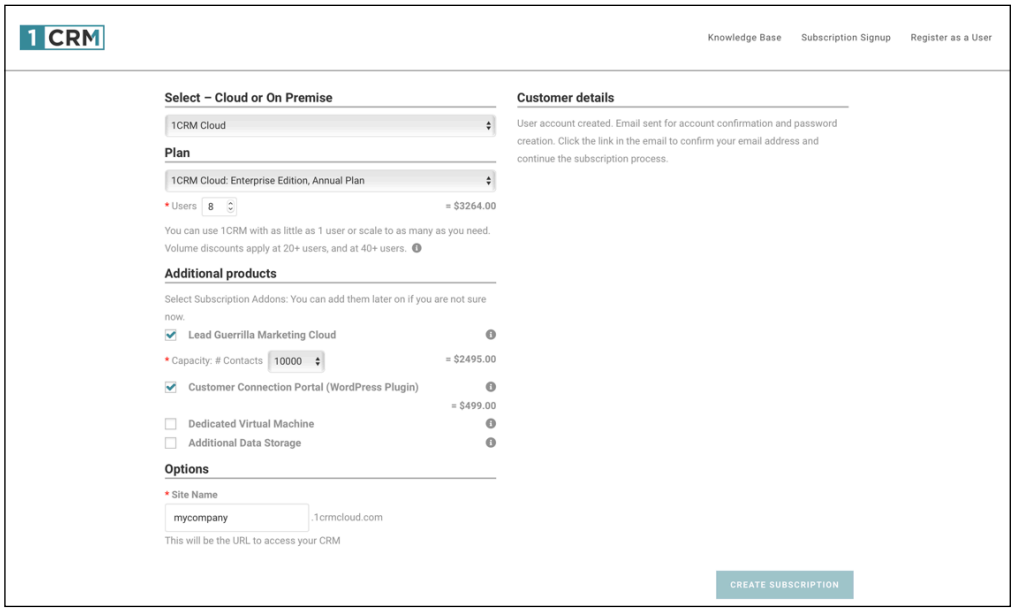


Figure 43: 1CRM Customer Connection - Subscription by Unregistered Visitor, Part 2

They are then added as a WordPress user, and as a Contact and Account in the linked CRM. An email is sent to them immediately, which they should open right away, and then click on the link in it to be directed to a screen where they set their password as shown in the Figure below:

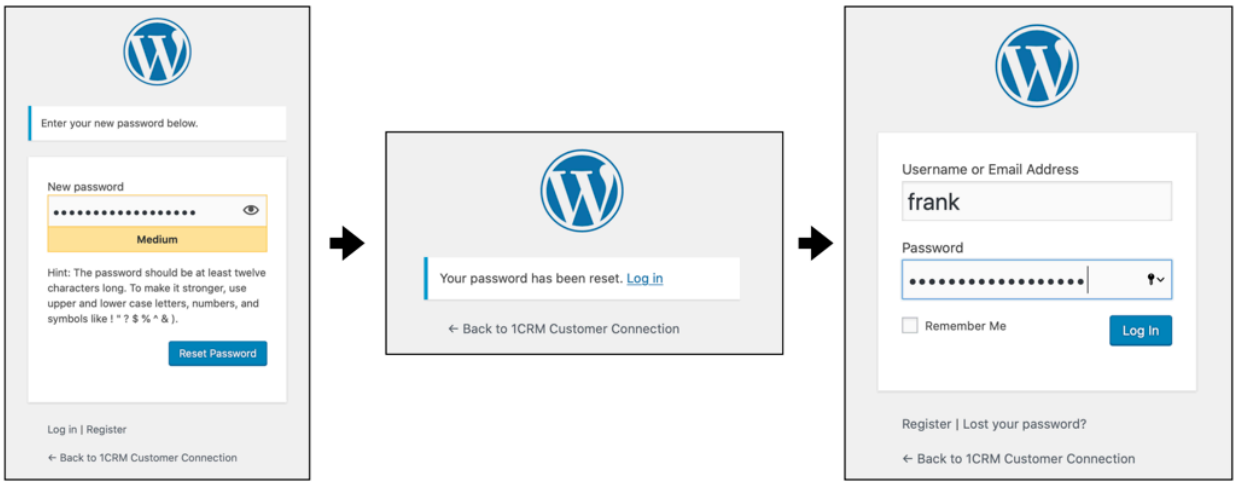


Figure 44: 1CRM Customer Connection - Subscription by Unregistered Visitor, Part 3

As seen above, the user enters their new password, then clicks on *Reset Password*. Then they see the dialog box telling them that their password has been reset, with a link they click to *Login*. Then they see the Login form, fill that in, and then they are returned to the Signup form with their subscription selections and their customer details displayed as shown below, and they proceed to establish a Payment method.

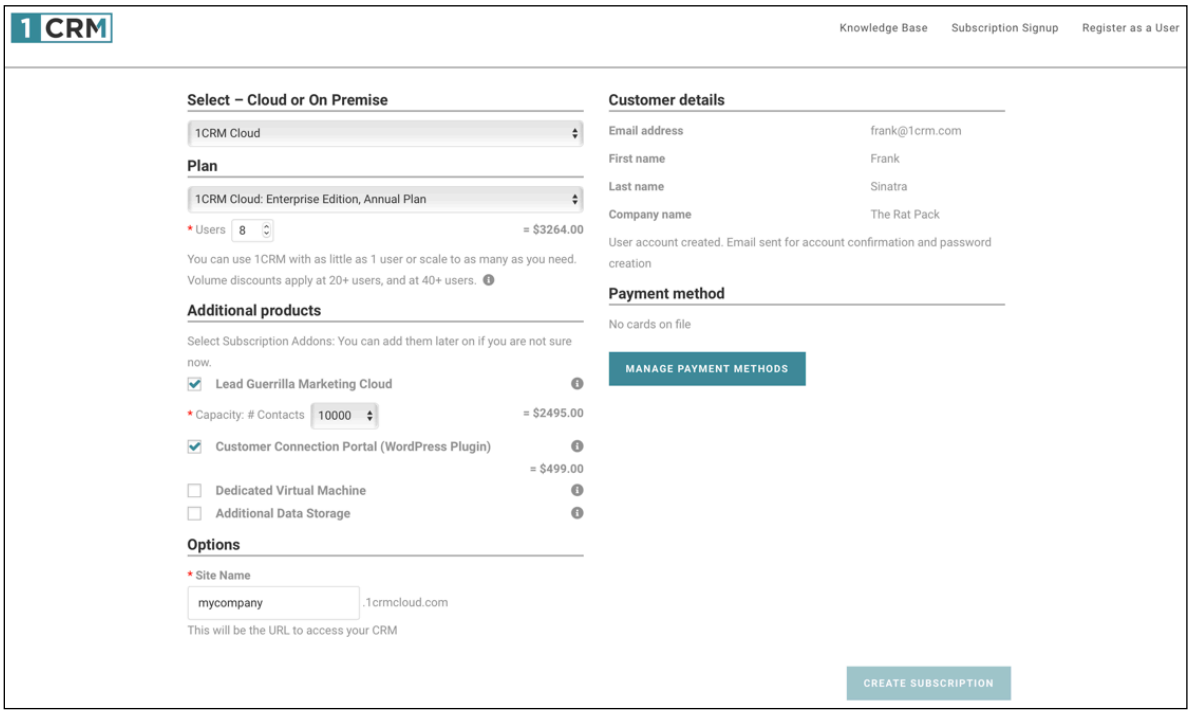


Figure 45: 1CRM Customer Connection - Subscription by Unregistered Visitor, Part 4

When the client clicks on Manage Payment Method, a popup box is displayed on top of the subscription page, as seen below. The client enters their card information, then clicks on *Add*. When the client has added one or more Payment methods, they can click on *Done* —> to return to the main Subscription form, where they select the active Payment method radio button, and then click on *Create Subscription*.

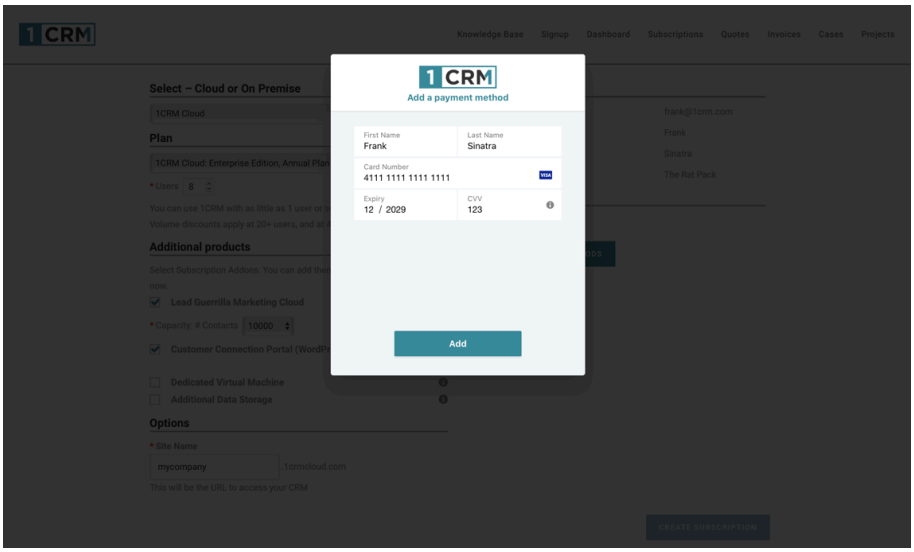


Figure 46: 1CRM Customer Connection - Subscription by Unregistered Visitor, Part 5

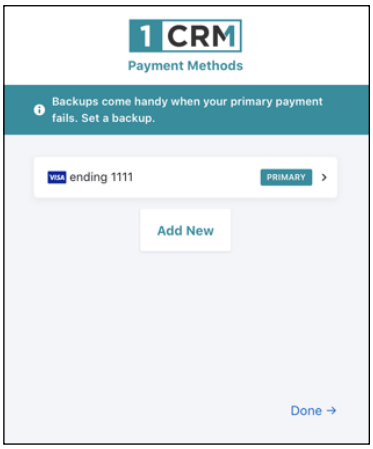


Figure 47: 1CRM Customer Connection - Subscription by Unregistered Visitor, Part 6

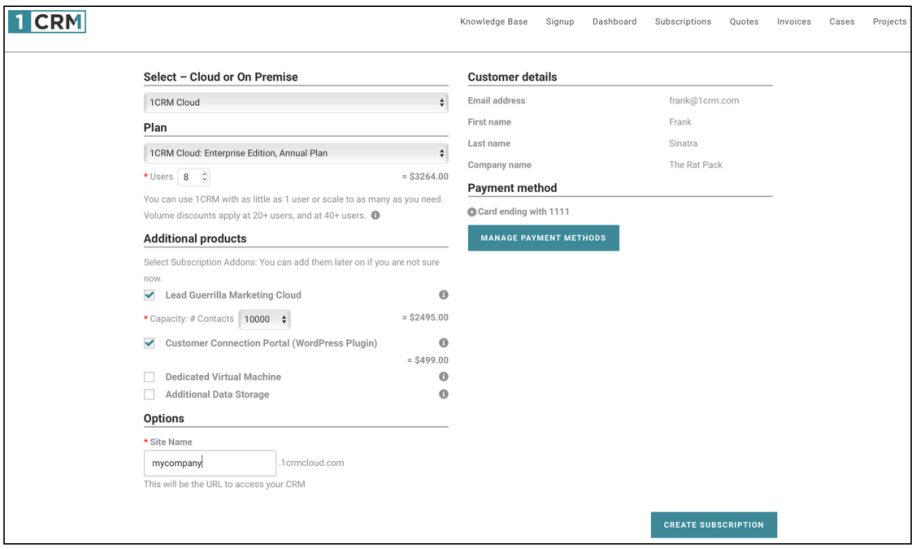


Figure 48: 1CRM Customer Connection - Subscription by Unregistered Visitor, Part 7

3.9 Quotes & Approvals

Portal users may view a list of Quotes, or select a specific Quote to see more detailed information.

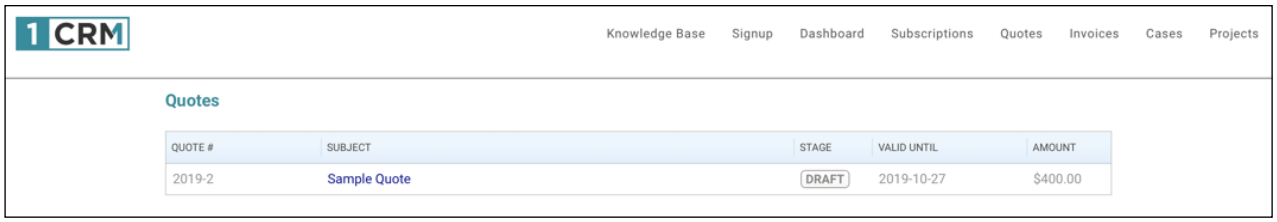


Figure 49: 1CRM Customer Connection - Quote List View

The Quote detail view allows the Portal user to download the PDF version of the Quote, using the *Download PDF* button. It also shows any related Notes with *Display in Portal* checked in the CRM.

Visitors will also be able to use the *Add Note* button to add a note to the Quote, and optionally may upload a file attachment with that note. For example, clients may download the Quote PDF, sign off on it, and upload it as an attachment to a Note.

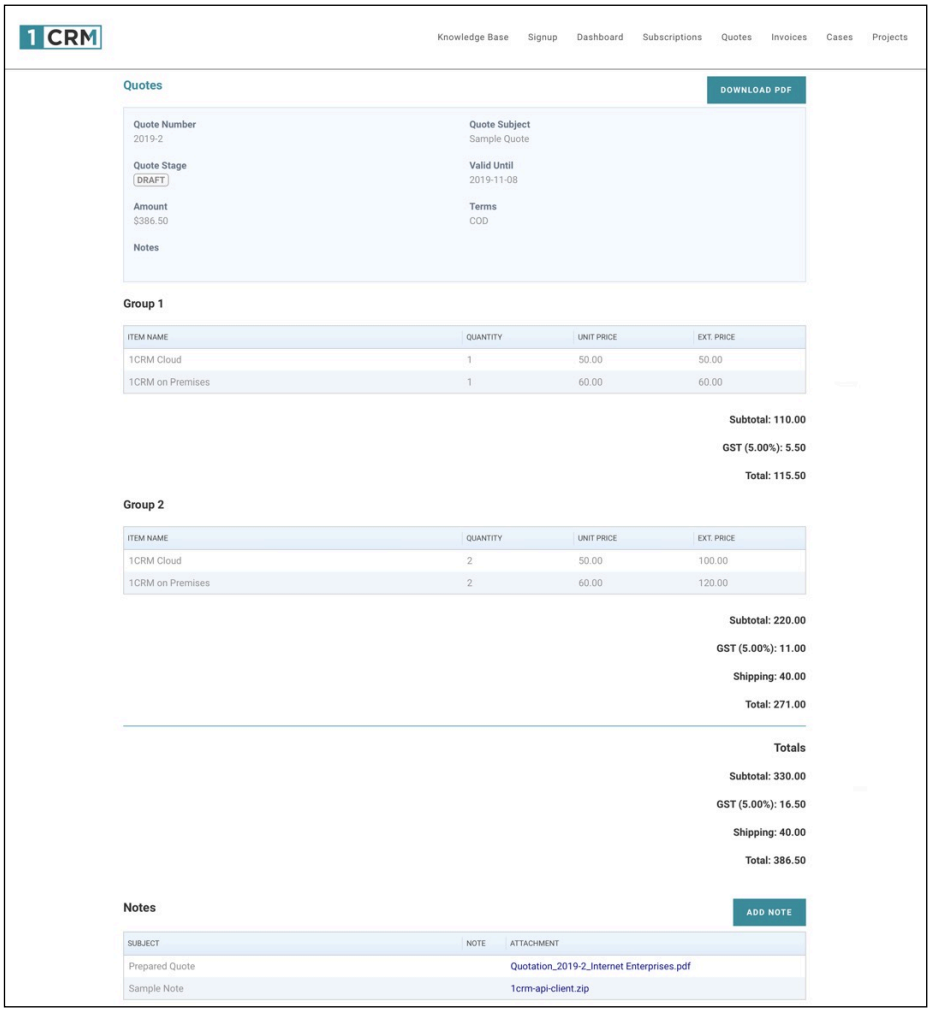


Figure 50: 1CRM Customer Connection - Quote Detailed Info

3.10 Invoices & Payments

Portal users may view a list of Invoices, or select a specific Invoice to see more detailed information.

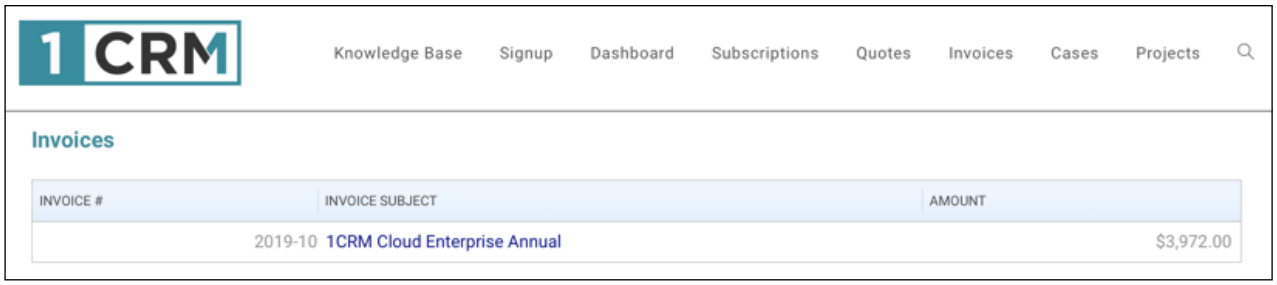


Figure 51: 1CRM Customer Connection - Invoice List View

The Invoice detail view allows the Portal user to download the PDF version of the Invoice using the *Download PDF* button. It also shows any related Payments and Notes.

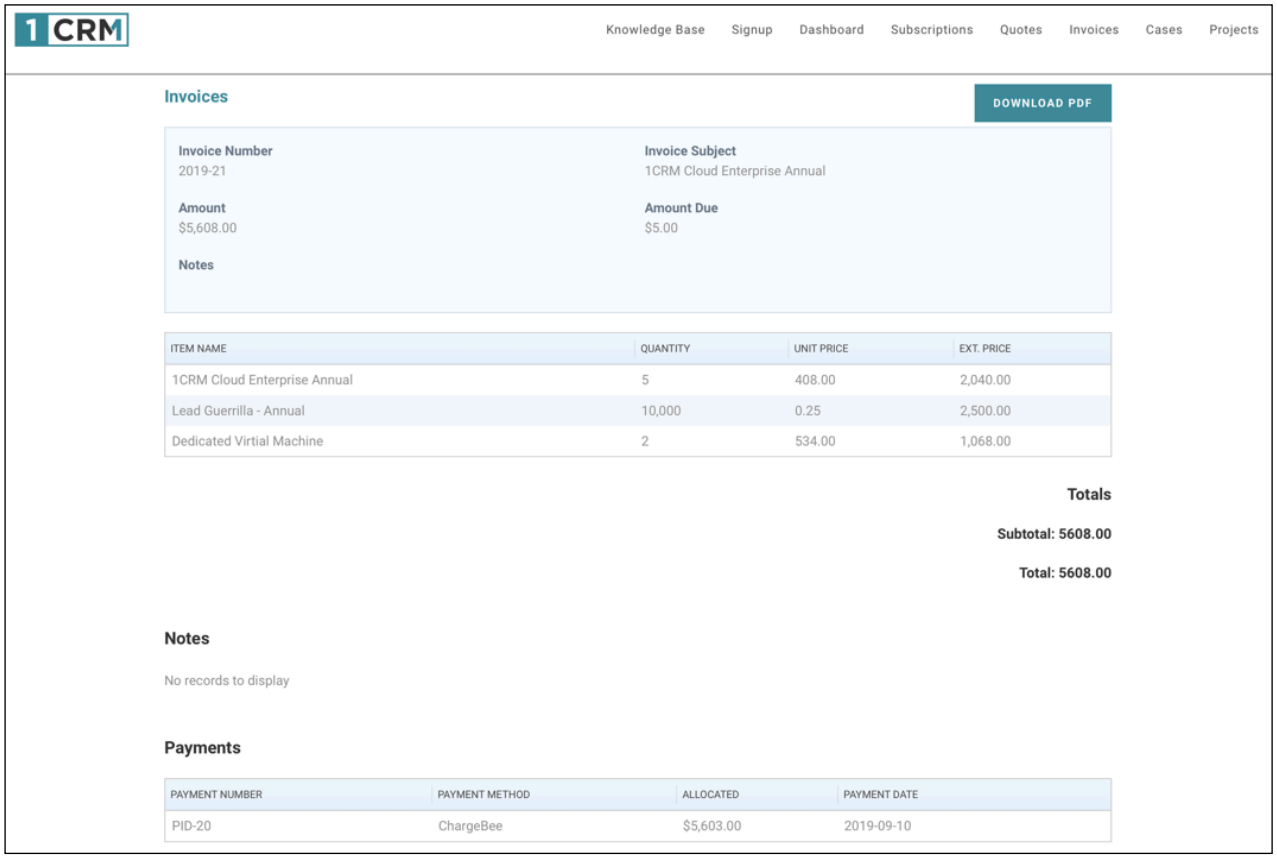


Figure 52: 1CRM Customer Connection - Invoice Detailed Info

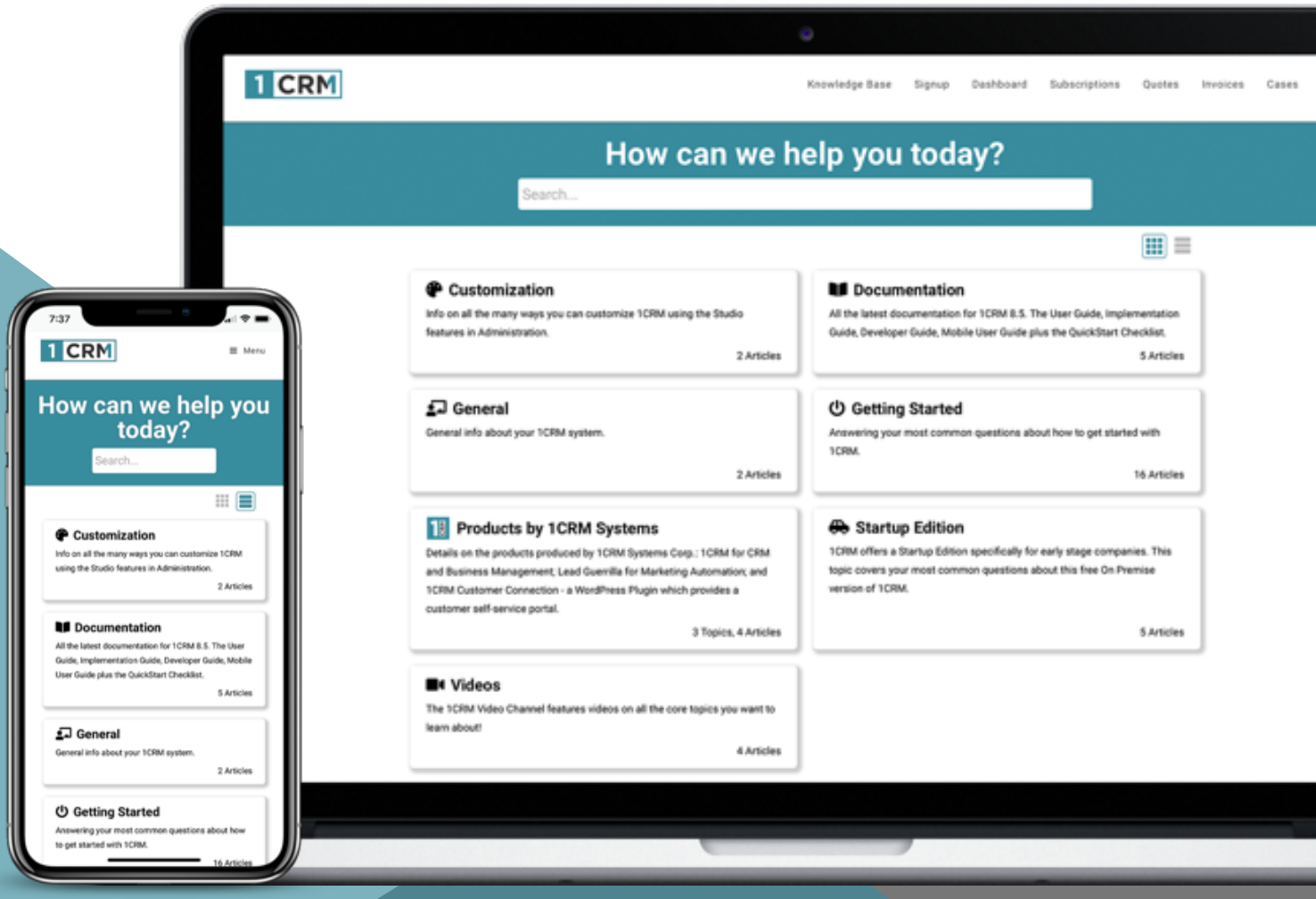
3.11 Partner Portal Access

The 1CRM Customer Connection provides additional capabilities to users who are also associated with Partners within the CRM. Let's recap:

- Each 1CRM Customer Connection user is a WordPress user
- That WordPress user is linked to a Contact in the 1CRM core system
- In 1CRM, each Partner is associated with an Account
- Each Partner has a list of *Authorized Contacts*

If one of a Partner's Authorized Contacts logs in as a WordPress user, they will be able to view those *Accounts*, *Opportunities* and *Leads* which are shown in the CRM as linked to that Partner record.

Accounts, Opportunities and Leads displayed are limited to those Accounts for which the contact is an authorized contact.

1CRM CUSTOMER CONNECTION

Customer Portal Plugin for WordPress