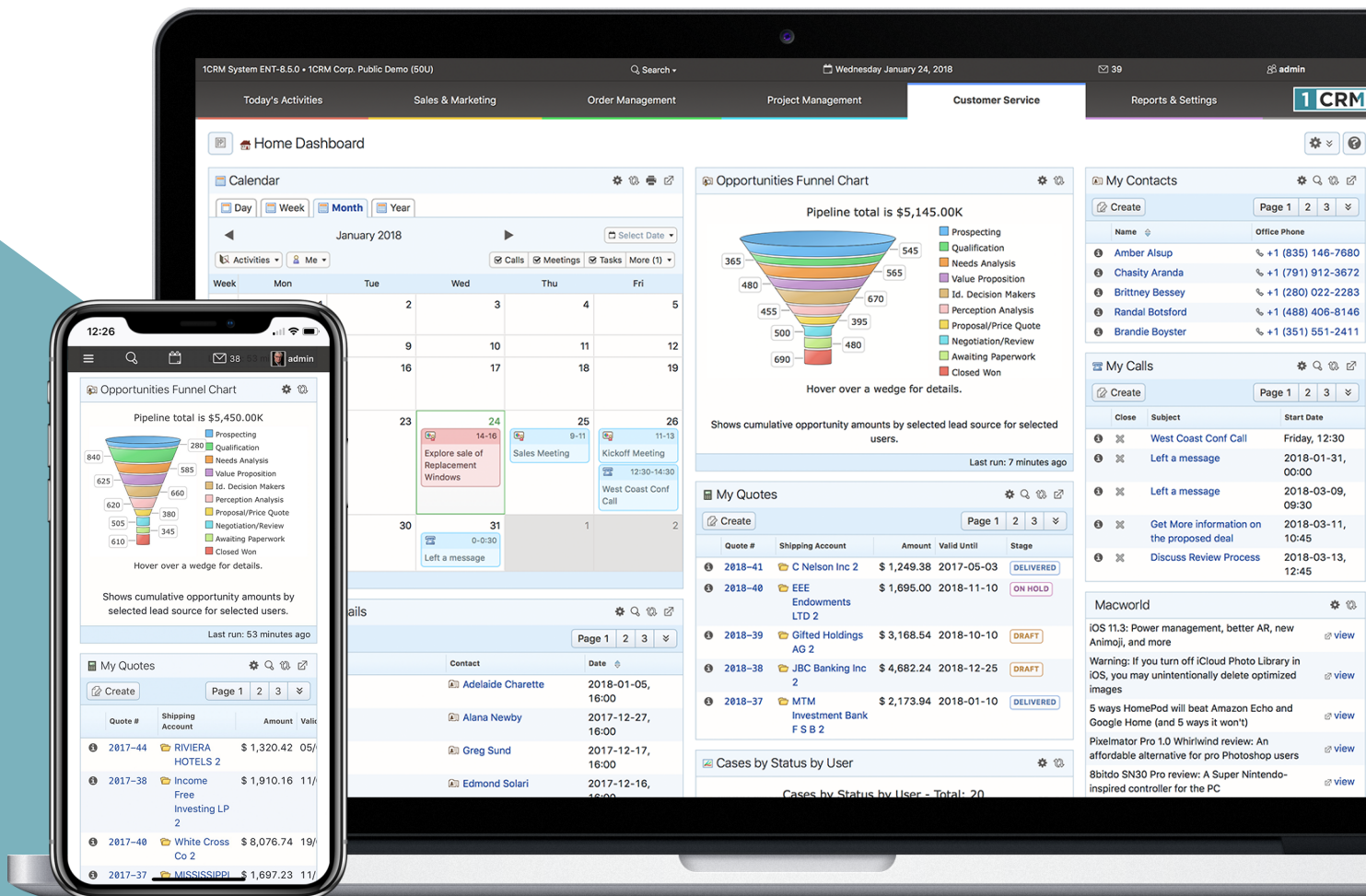# 1CRM SELF-SERVICE PORTAL GUIDE

A Comprehensive Guide to Implementing Administering & Using the 1CRM Portal

Version 4.2, March, 2018. This document is subject to change without notice.

Disclaimer

While every effort has been made to ensure the accuracy and completeness of information included in this document, no guarantee is given, or responsibility taken, by 1CRM Corp. for errors and omissions.

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1.0 Welcome

Thank you for using the 1CRM Self-Service Portal from 1CRM Corp. The 1CRM Customer Relationship and Business Management system is designed to energize your organization's efforts to efficiently organize and maintain information that is crucial to many aspects of your business – and the Self-Service Portal is a key part of the system's overall capability.

The 1CRM system is available in four Editions:

- Startup Edition: Free for use On Premise. Request a license key and download link, and you can install Startup Edition on your own server at no charge. It offers all the features of 1CRM Professional Edition, but is limited to 3 Users, 300 Accounts, 750 Leads, 750 Contacts, and 750 Targets. Although it only offers Community support, and no updates, the Startup Edition is a great way for an early stage business to get itself organized and productive while operating on a shoestring budget!

- Startup+ Edition: Similar to the Startup Edition, but for somewhat larger firms, with capacity limits of 10 users, 600 Accounts, 1,500 Contacts, 1,500 Leads and 1,500 Targets. Unlike the Startup Edition, this is a commercial product, available on the 1CRM Cloud or for On Premise software installation.

- Professional Edition: Formerly known as **info@hand**, 1CRM Professional is our mainstream small business CRM product offering, available on the 1CRM Cloud or for On Premise software installation.

- Enterprise Edition: Our premium product. It offers all the features of 1CRM Professional Edition, plus a number of additional features of particular interest to larger, more sophisticated businesses. Administrators can use the Module Designer and PDF Form Designer to create more advanced customizations. Price Books let you establish pricing for multiple client levels. The iOS client provides optimized system access from an iPhone. And Advanced Reporting offers more sophisticated reporting capabilities.

Unlike most CRM solutions, 1CRM offers comprehensive Order Management. It includes a Product Catalog, plus the ability to create Quotations, Sales Orders and Invoices using products from the Catalog. Incoming Payments may be received and allocated against invoices, and the system can produce PDF documents for Quotes, Sales Orders, Invoices, Receipts, and Statements. Purchase Orders may also be created, and Outgoing Payments recorded against them.

1CRM also offers extensive features for Project Management, Service Management, and general office administration (including Expense Reports, Timesheets, Vacation scheduling and tracking, and HR).

Most importantly, the system seamlessly blends all of these capabilities into an intuitive and friendly tabbed interface. The instructions in this guide will describe how to install and administer your new Self-Service Portal, and help you get familiar with the fundamentals of how your customers will use the system, and how it is linked to the business information within your 1CRM system.

1.1 About this Guide

This guide is current with the details of operation for the 1CRM Self-Service Portal & eStore 4.2 – a part of the 1CRM system versions 7.7.7 and later.

The information in this guide describes how to install and administer the 1CRM Self-Service Portal via a web browser. Readers are not required to have any programming or software development knowledge, but should be generally familiar with the administration of a server running macOS, Windows Server or Linux (depending on the operating system chosen to host 1CRM), and how to install new software on their server. The target audience is primarily system and network administrators.

1.2 Who Should Read this Guide?

This 1CRM *Self-Service Portal Guide* provides information for two groups of system administrators:

- *System & Network Administrators* of businesses that are running the 1CRM system, and are tasked with the installation and configuration of this Self-Service Portal software; and

- *System & Network Administrators* of businesses that are running the 1CRM system, and are tasked with managing the Self-Service Portal once it is installed – adding data to the portal to define new content, new FAQ categories and topics, and adding new users to the system as required.
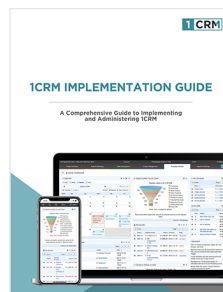
1.3 Additional Documentation

The 1CRM Customer Relationship and Business Management (CRBM) system offers extensive documentation for the installation and use of its various components. Click on any image to download that document:
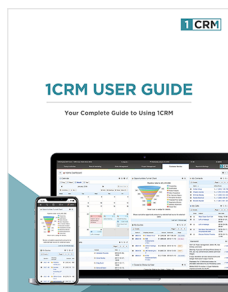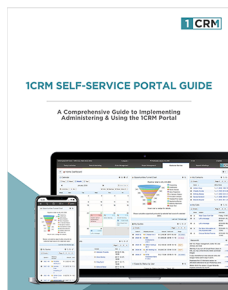

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2.0 Installing the Self-Service Portal

The 1CRM Self-Service Portal, like the main 1CRM system, is built using PHP/MySQL technology. See the 1CRM Implementation Guide for details of the appropriate revisions of system software (operating system, web server, MySQL database and PHP scripting language) to use for hosting this application.

The Self-Service Portal is built using the Joomla! Content Management System. The 1CRM Self-Service Portal is developed currently on Joomla! 3.4.3 – but that is subject to revision as later releases of Joomla! become generally available.

The 1CRM Self-Service Portal also requires the VirtueMart software to be installed - version 3.0.9 - http://virtuemart.net/), and some changes to it that integrate its operation with 1CRM.

2.1 Install Joomla! & VirtueMart

To begin the installation process for the 1CRM Self-Service Portal, first make sure you have already installed your 1CRM system, and that the system is running smoothly.

Next, take the Joomla! zip file for version 3.4.3 (see joomla.org), and unzip it. Rename the containing folder to **portal**. Then move this folder into the root directory of your 1CRM installation folder. Set the permissions on this folder and the file structure within it to the same values as the rest of the 1CRM installation.

Now at the MySQL console, make a new database, and call it **portal**. You will use this in the Joomla! installation process. (The syntax is: `CREATE DATABASE portal;`)

Now follow the Joomla! installation instructions found here. Your Joomla! installation URL will be your normal URL to access 1CRM, followed by **/portal**.

Next, download VirtueMart version 3.0.9 here, and unzip the downloaded archive.

Install the VirtueMart core component via the Extension manager (`com_virtuemart.3.0.9.zip`. `Next` install the VirtueMart AIO component via the Extension manager. It contains VirtueMart plugins and modules (`com_virtuemart.3.0.9_ext_aio.zip`). And finally install the PDF Print software `com_tcpdf_1.0.0.zip` the same way.

2.2 Install the 1CRM Portal Extensions

Download the 1CRM Self-Service Portal zip file (there is a link in your 1CRM Welcome email, or any release notice), and unzip it to see the various files you need for the portal installation.

Install via the Joomla installer, *in this exact order*:

- com_1crm_portal-4.2.zip

- plug_1crm_portal-4.2.zip
- plug_1crm_virtuemart.zip
- com_1crm_portalfaq-4.2.zip

Finally, the plugins *1CRM System Plugin* and *1CRM VirtueMart Plugin* must be enabled for the system to work. By default they are disabled after installation, so they must be enabled manually, using *Extensions - Plugin Manager* in the Joomla! administration menus.

2.3 Configure 1CRM to Use the Portal

Next – within the 1CRM system, go to the Admin area, and within System Settings, look for the section entitled *1CRM Self-Service Portal*. Enable the check-box entitled *Enable Self-Service Portal Integration*. This enables the main 1CRM system to communicate with the Self-Service Portal. Also enter the URL for the Self-Service Portal - this is used by automated customer notification emails to point them to updated information, such as updated service Cases.
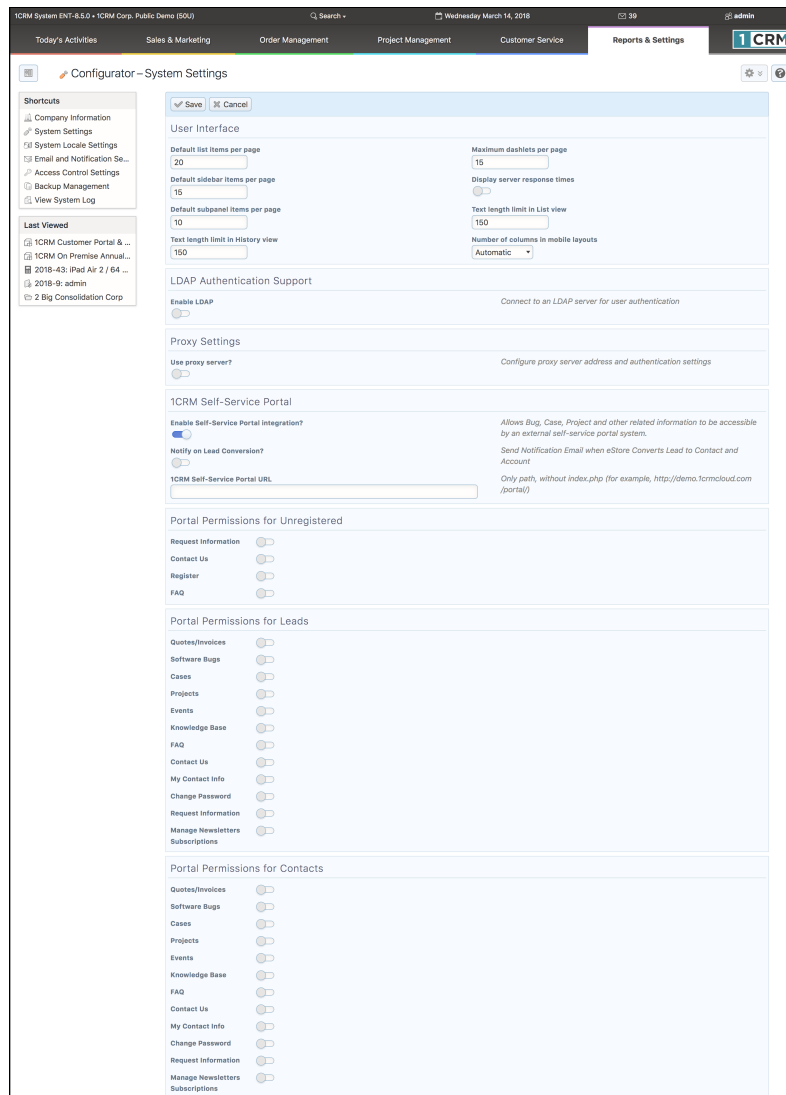
Figure 1: Configure 1CRM Settings for Portal Use

Then set the check-boxes to define the permissions for Unregistered Users, Leads and Contacts within the Self-Service Portal - if you have no preferences as yet, set them all. Portal users linked to Leads within 1CRM will see the menu options selected, and similarly for the Portal users linked to 1CRM Contacts, and Unregistered Users (i.e. users that are not logged in).

Now you can click on the *1CRM Portal* link at the top right to see your new portal site, or carry on configuring your portal. The administration functions may be accessed at any time by using the portal URL with /administrator/ appended to it – so for our example the URL would be http://demo.1crmcloud/portal/administrator/.

2.4 Configure the eStore

At this point you should likely use the Joomla! administrator site to set your company information for the eStore. Select the VirtueMart component from the *Components* menu (see Figure 2).

Here you can set your company name and address information, as well as a logo to be used on PDFs produced by the eStore (there is a link within the shopping cart to produce PDFs). As well, you may set a minimum order value for free shipping, the currency to be used in your eStore, and a minimum purchase value. See here for full details, videos, etc..
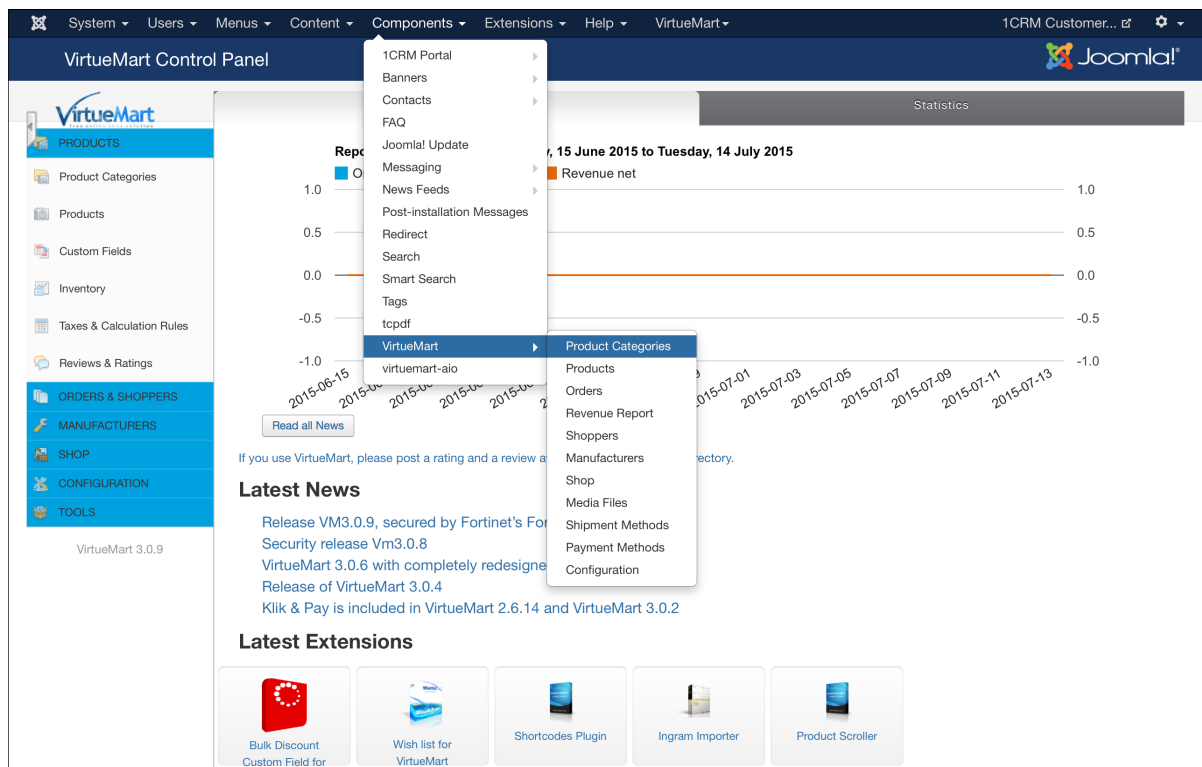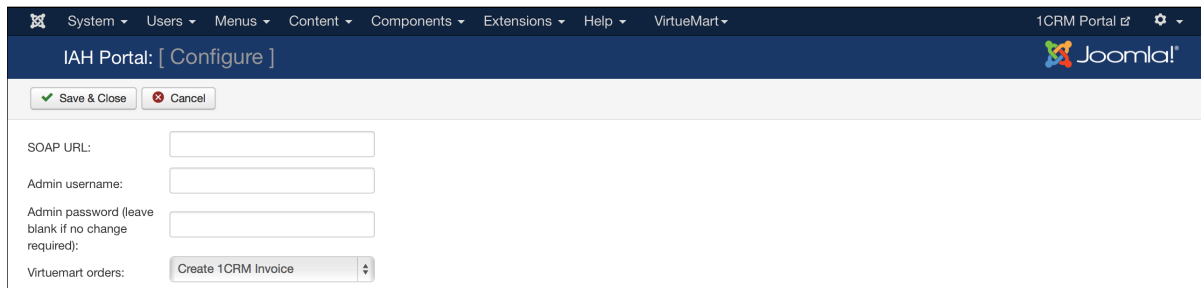
Figure 2: Configure the VirtueMart Store

2.5 Link the Portal to 1CRM

Before you can do anything useful with your Self-Service Portal, you must first link it to the 1CRM system via web services. 1CRM supports both SOAP and json web services, and Portal 4.2 uses the faster json services to link to the CRM.

From the *Components* tab choose the *1CRM Portal* menu option, and the *Configure* sub-menu option. When you select it, you will see this screen displayed:

Figure 3: Configuring Portal Connection to 1CRM

Here you must enter the URL for your 1CRM system, and the username and password for an admin user within 1CRM – then click on the *Save* icon. For the example URL we have been using in this guide, the SOAP URL would be http://demo.1crmcloud.com/soap.php. Don't forget the soap.php on the end - many people do!

Now you need to change an important Joomla! default setting. In Joomla! Admin, go to *System - Global Configuration - Users Manager*. Change *Allow User Registration* to Yes, and *Save*. This will allow visitors on your portal to create themselves as Portal users, which will save a great deal of administration.

2.6 Synchronize the Product Catalog

You should now perform the VirtueMart Catalog Synchronization function. Select it from the Administrator menu as *Components - 1CRM Portal - VirtueMart Sync*. From the screen (see Figure 4) click on the button *Synchronize Catalogue with* 1CRM. For this initial sync, be sure to choose the *Replace* option, not *Update All Products* or *Update New Products*. You should see messages from the synchronization process similar to those shown in Figure 5.
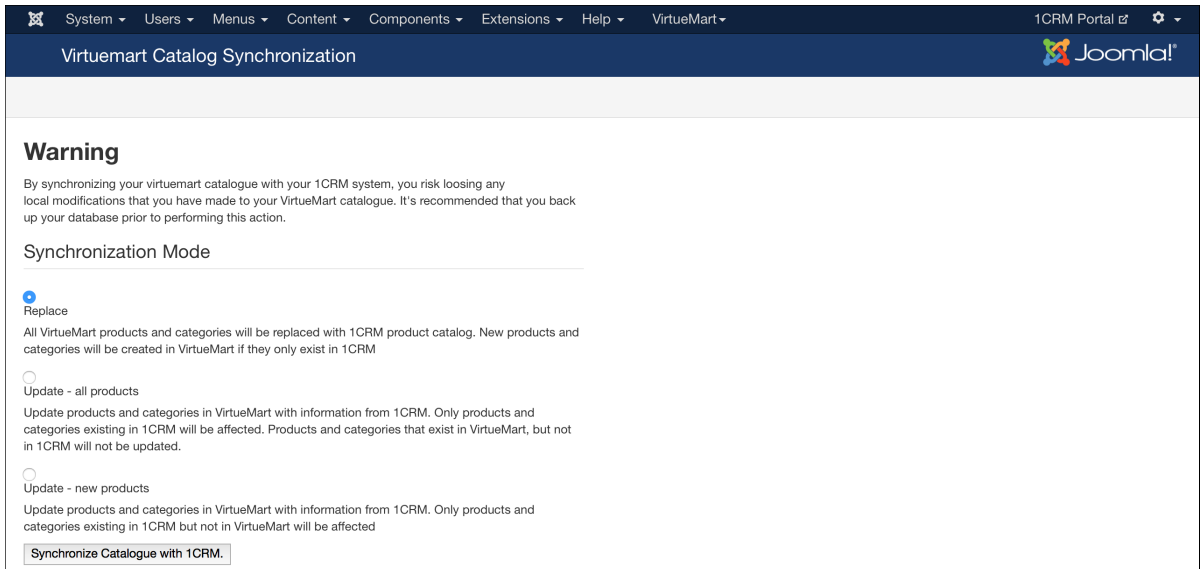
Figure 4: VirtueMart Catalog Sync
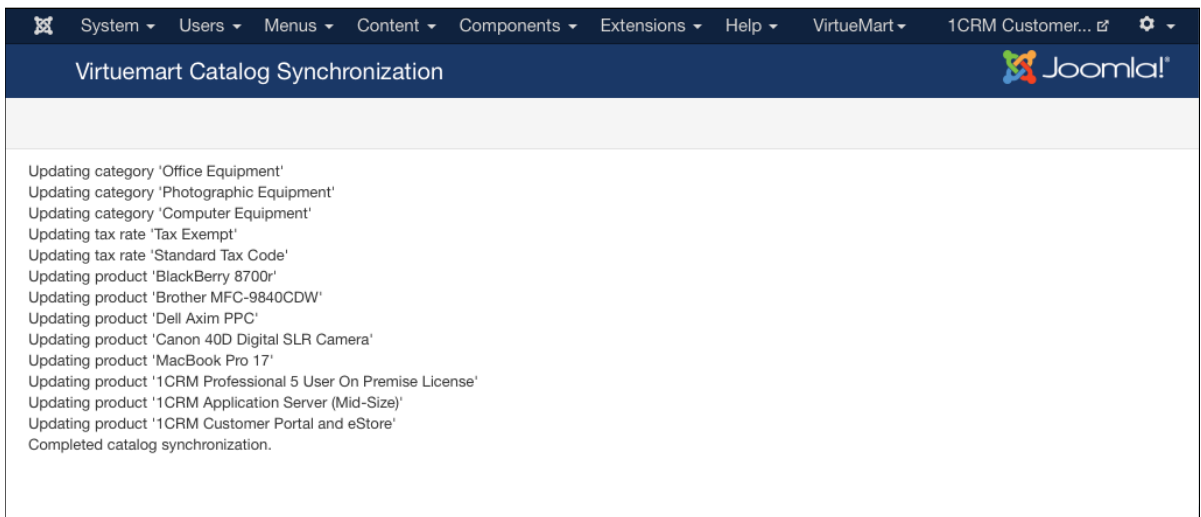
Figure 5: VirtueMart Catalog Sync Completed

2.7 Add the Portal Menu Items

You should add in the 1CRM Portal functions to your Portal menu as shown to visitors. In Joomla! administration, go to Menus - Main Menu. Add your new Menu Items as follows:

- For each new menu item, click on *New*, and then on *Select*.

- In the *Menu Item Type* popup, select *1CRM Portal*, and then the portal function desired.

- Now enter the *Menu Title*, and click on *Save*.

- Do this for each portal function you want to have available for users - typically add all these in this order: *Quotes, Bugs, Cases, Projects, Knowledge Base, My Contact Info, Change Password, Info Request, Leads, Accounts, Opportunities, Invoices* and *Newsletters*.

- Then do it once more for Menu Item Type *1CRM FAQ*, and add in *FAQ* as menu item *FAQs.*

- Repeat the process for Menu Item Type *Contacts*, and choose *List Contact Items in a Category*, adding it in as *Contact Us.*

- Finally do it once more for Menu Item Type *VirtueMart*, and add in the *Front Page* as *1CRM Store*, and you will end up with a screen resembling the one shown in Figure 6.
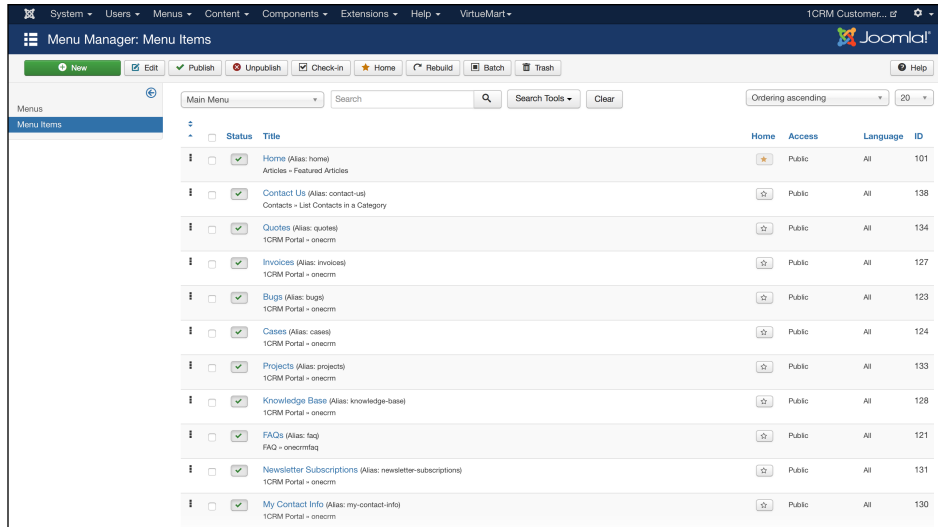
Figure 6: Portal Menu Definition

2.8 Enable Smart Search

To enable the smart search box at the top right of every portal page, perform the following steps:

- In the Joomla! Administration screen, go to *Extensions - Module Manager*, and click on *New*.

- Define an entry as shown below, and *Save*.
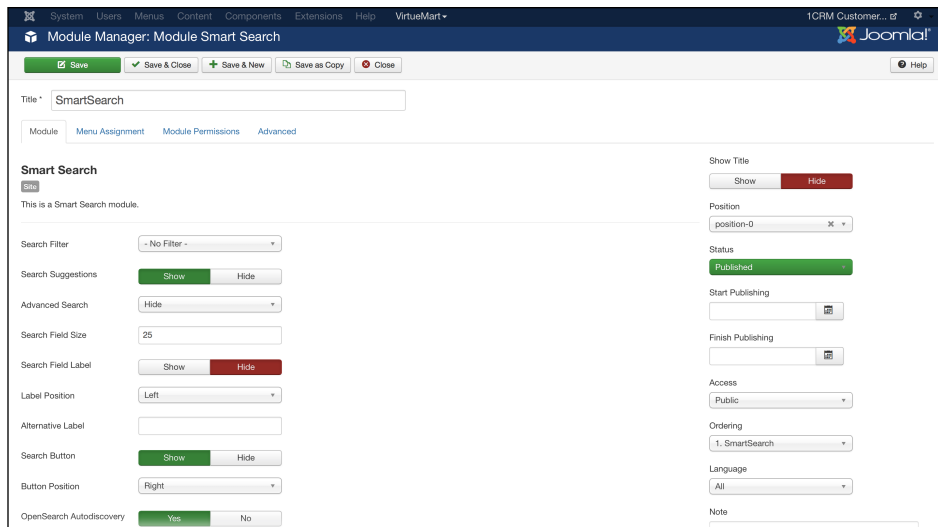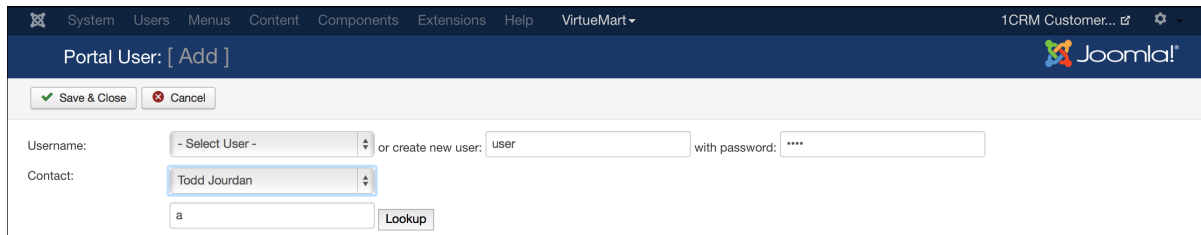
Figure 7: Adding Smart Search

- In the Joomla! Administration screen, go to *Extensions - Plugin Manager*, and enable the Smart Search plugins.

- In the Joomla! Administration screen, go to *Components - Smart Search*, and click on the *Index* button top left, in order to start Smart Search indexing.

2.9 Create a Sample Portal User

Now let's create a sample portal user account, in order to try out our new portal installation. In Joomla! administration, go to *Components - 1CRM Portal - Portal Users Management*. Click on New, and you will see a screen like Figure 8.

Figure 8: Adding a Portal User

Enter a user name and password - we will enter *user* for both here. Then to the left of the *Lookup* button, enter some text (a minimum of one character is required, and it only matches on *Last Name*) and click on *Lookup*, to find one or more matching Contacts in your 1CRM system, to whom this portal user will be linked. Above we see *Todd Jourdan* is the first member shown of the list of matches. Choose the Contact desired, then click on *Save & Close*. (If you look in the 1CRM system now, in *Admin - User Management*, you will see a new *Portal Only* user has been created.)

Your new user in the Self-Service Portal will therefore be able to access all Cases, Software Bugs, Invoices, Quotes and Project Information that relate to Todd Jourdan, or to the Account with which his Contact is associated. And that is the only data the new portal user will be able to access within those 1CRM modules. The new portal user will also be able to access and update their own Contact Information within 1CRM, access Knowledge Base information, register for Marketing Events, and access the eStore within the portal.

You have now completed installing the 1CRM Self-Service Portal and eStore. If you click on the *1CRM Customer Self-Service Portal* link top right on the Joomla! Administration screen, you should now see something like Figure 9 below. Notice *FAQs*, *Info Request* and *1CRM Store* showing in the menu even though the visitor has not logged in yet. And also notice below the *Login* button, *Create an Account*, which is available because of what you did in the last paragraph of section 2.5.
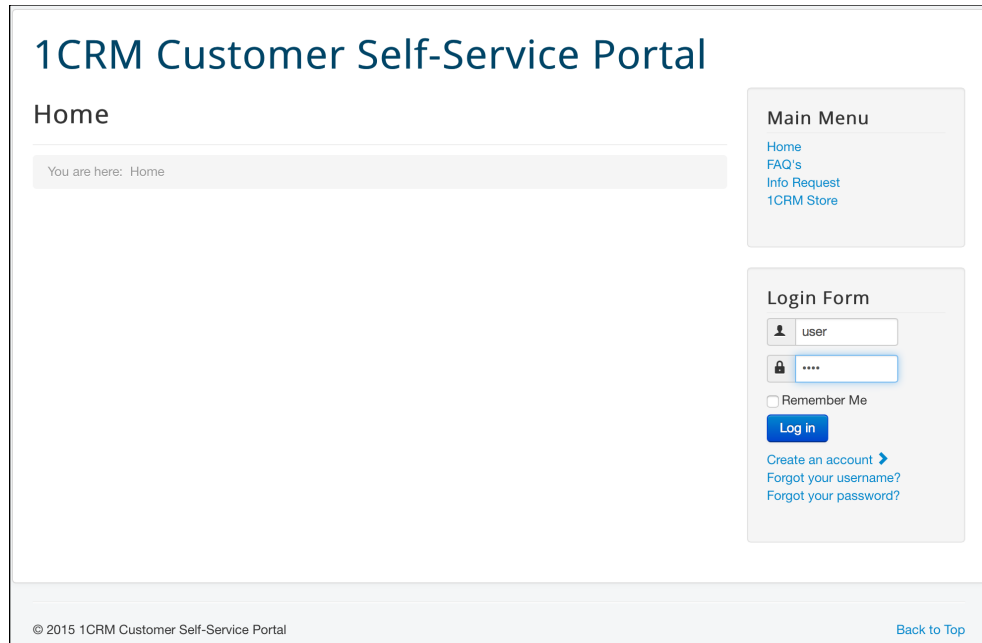
Figure 9: Portal User Login

2.10 Login as a User

Now login to the customer portal, with the user information just created above. Notice how the menu displayed now changes (see Figure 10 below), as you are an authenticated user now, and can see information related to your customer account from within the linked 1CRM system!
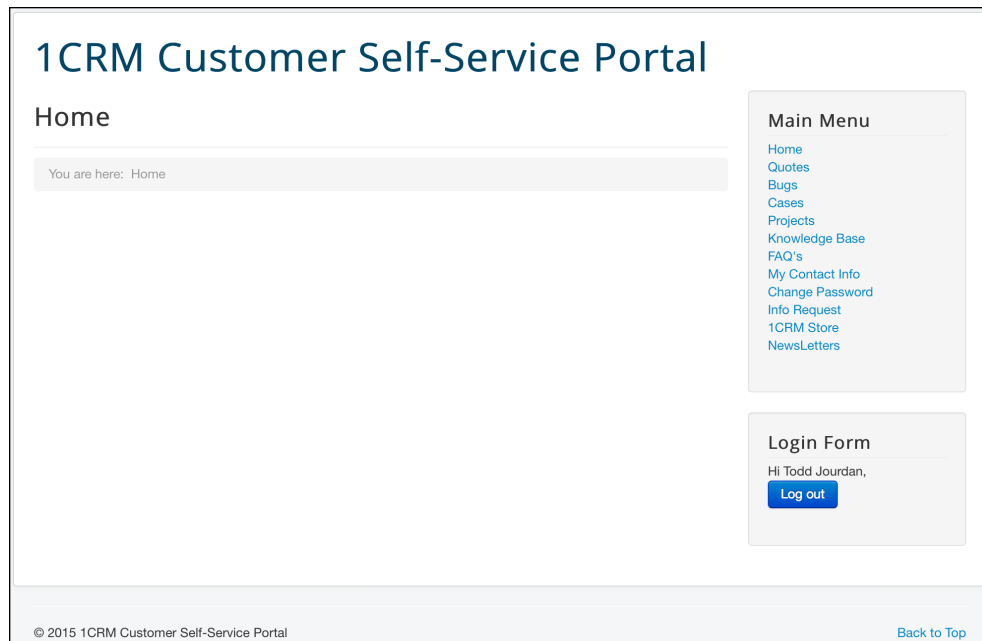
Figure 10: Portal Menu after Login

3.0 Administering the Self-Service Portal

First – login to the administrator site (using the portal url with */administrator/* added at the end) using the username and password shown on the last screen of the installation process. This user has Super User rights – as you can see on the screen below.
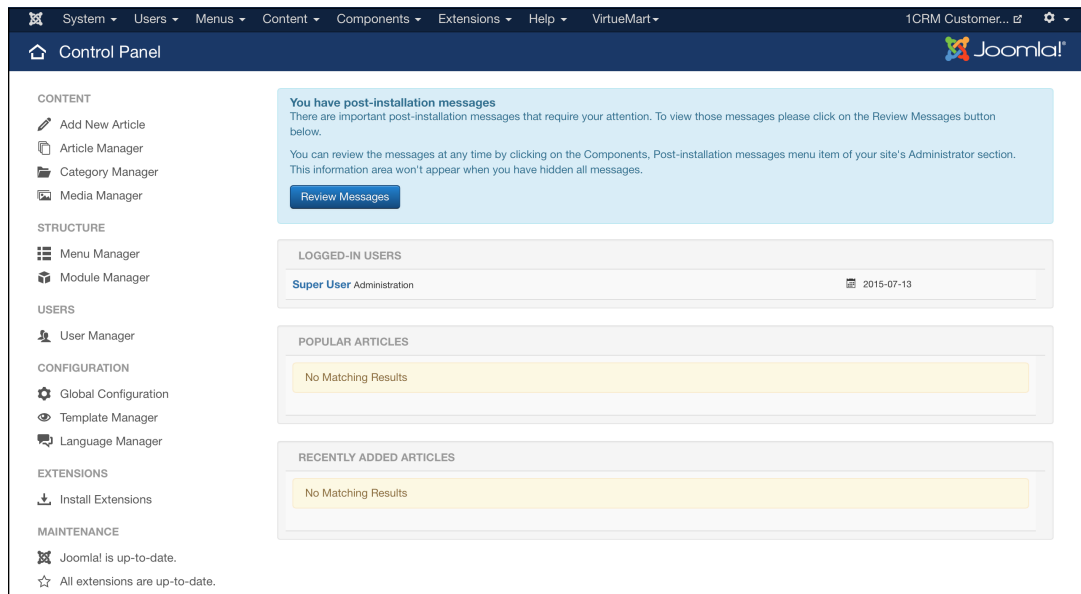
Figure 11: Joomla! Administrator Home Page

Note: This guide is not meant to act as a definitive reference to the administration of a Joomla! site. To administer features of a Joomla! site not specific to the customizations added to create the 1CRM Self-Service Portal, please see https://docs.joomla.org/Joomla_3_FAQ.

3.1 Understanding Portal Users

The 1CRM Self-Service Portal links each portal user (or at least, each one that is to have access to data in 1CRM) to a Contact or a Lead within 1CRM. In this way each Self-Service Portal user can be given unique permissions to the 1CRM data. As this link is established, a *Portal Only* user is created within 1CRM for each Self-Service Portal user with 1CRM data access, as the conduit through which 1CRM provides data to the Self-Service Portal.

Note: These *Portal Only* users do not count as licensed users within 1CRM, and they are normally filtered out of the user lists displayed within 1CRM unless explicitly selected.

While existing Joomla! administration functions may be used to create a Joomla! user, the Self-Service Portal has an added administration function that lets you create a new Joomla! user, and associate it to a 1CRM Contact, all in one step. It is **critical** that you use this latter *Portal User*

Management function to create new Portal users, not the standard Joomla! function, as described in section 2.9 above.

3.2 Adding Content Items

To edit content items, such as the content displayed on the front page of the Self-Service Portal, from the Joomla! administration screen select the *Content* menu and then the *Article Manager* menu option, and then *Add New Article*. This will display a screen similar to that shown here:
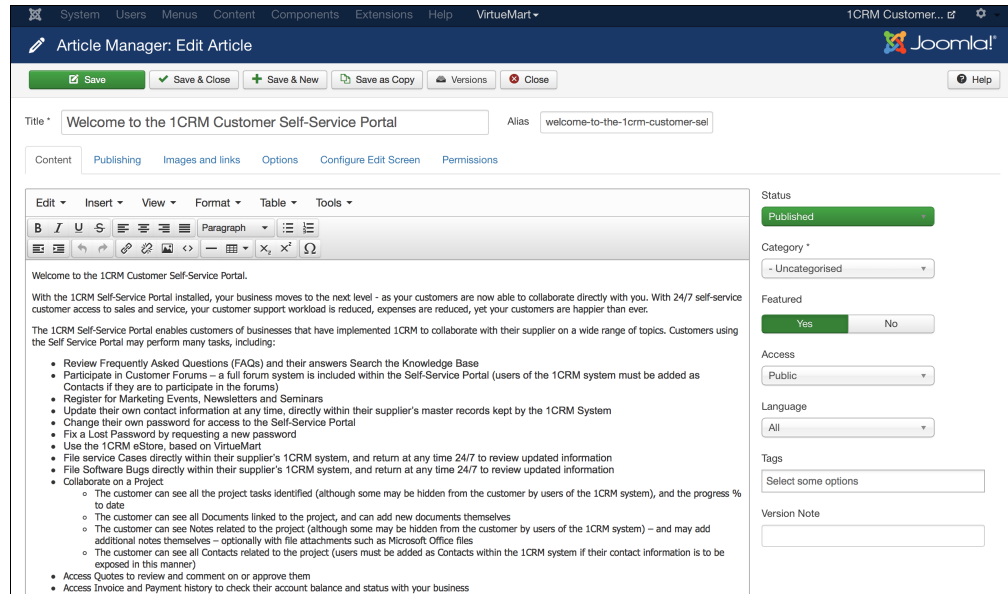
Figure 12: Adding an Article to Content

As an example of adding content, you could enter the text shown above. Be sure to mark it as a *Featured* article, and then click on the *Save* icon. If you now visit the portal as a user, you should see that article on the front page, as shown below:
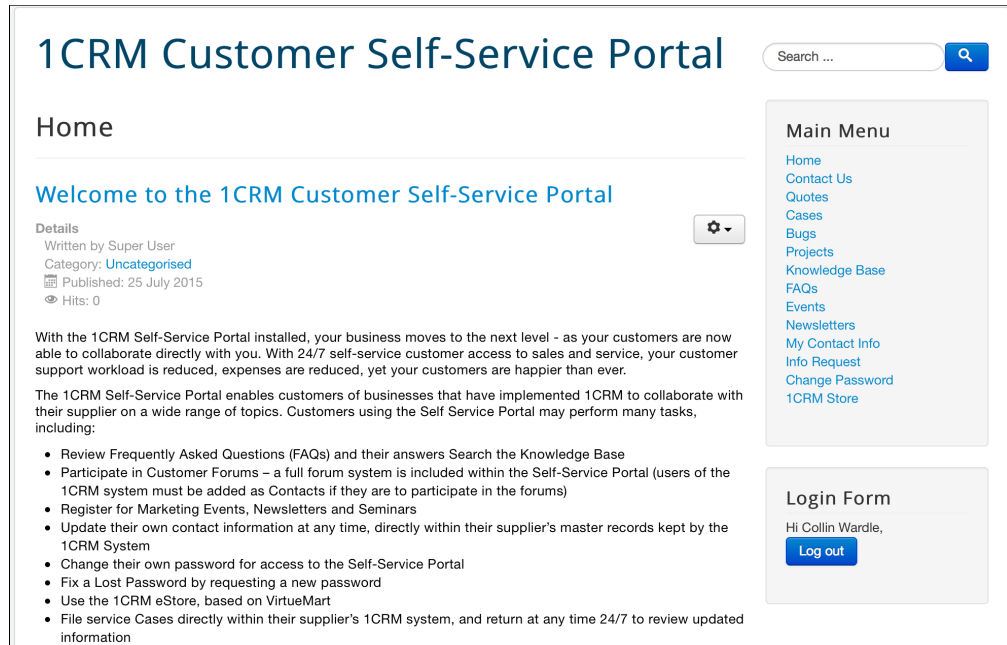
Figure 13: Portal Home Screen with Content

3.3 Setting Company Contact Info

From the Joomla! administration screen, select *Components - Contacts - Contacts*. Click on *New*, and you will see a screen much like this:

Figure 14: Create a Contact

Enter appropriate portal contact information in a format similar to that shown above, and click on *Save*. You may also edit the categories for contacts (notice this contact is at Head Office – you may wish to add another location) – by using the *Components - Contacts - Categories* menu option. Once you are done, company contacts will be displayed via the *Contact Us* menu item as shown below.
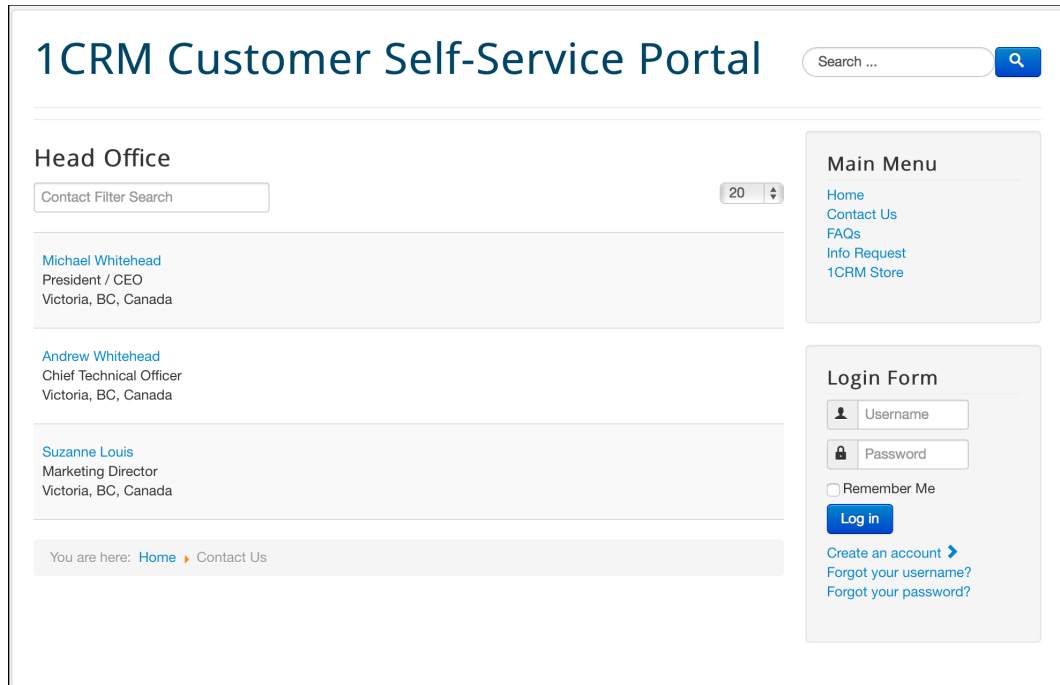
Figure 15: The *Contact Us* Screen

3.4 Managing Requests for Information

The Self-Service Portal option to Request Information produces this screen for the user if they select the option **when they are not logged in**:

Figure 16: Request Info

When the user fills in the appropriate information and clicks on the *Submit* button, they see a screen confirming that a message has been sent to the email address entered for the portal administrator.

For the request above, an email would be sent with the Subject *Information request*, and the body would be:

```
Name : Michael Whitehead
Email address : michael@1crm.com
Organization : 1CRM Corp.
Title : President/CEO
Phone : 604-616-0590
Fax : 613-692-7818

Please tell me all about your 1CRM product!
```

As well, a Lead is automatically entered in your 1CRM system, with a Lead Status of *New*, and a Lead Source of *Customer Portal*.

Figure 17: Lead Capture

3.5 Adding FAQ Info

FAQs (Frequently Asked Questions) in the Self-Service Portal are content items that are organized by Category, within the FAQs section. Use the Category Manager to add the categories you wish for your FAQs. From the Joomla! administration screen select *Content - Category Manager*. You will see a screen much like this:
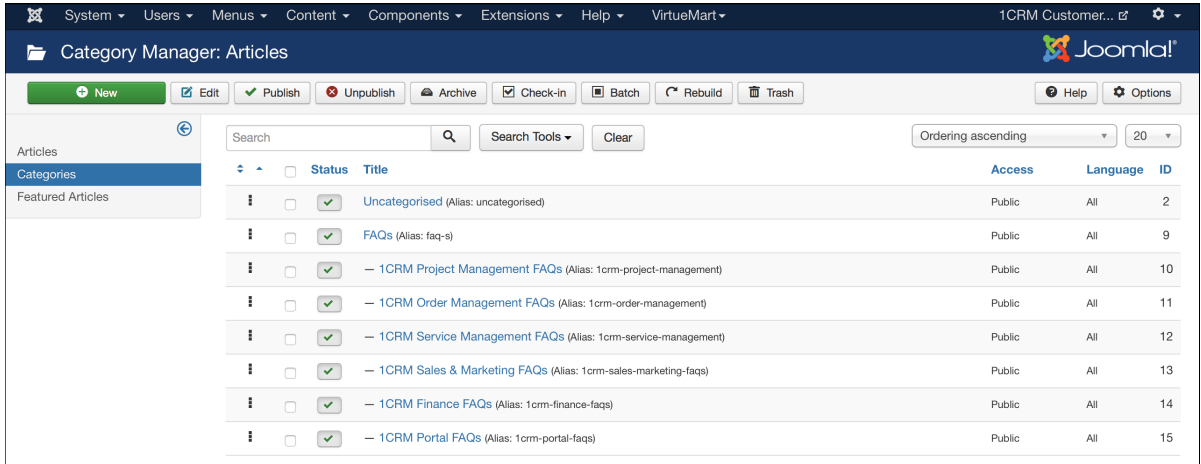
Figure 18: Category Manager

In the screen above we have added a general FAQs category, and then a series of specific FAQ categories within the general category (achieved by setting the general category as the parent of the specific categories as you add them).

Now on the Joomla! administration screen select *Components - FAQ*, and click on the *Options* button top right. Set the *FAQ section* to the general *FAQs* category created above. This will produce an FAQ page for users resembling the Figure below. Now just add new content to the various FAQ categories to build up content for your FAQs.
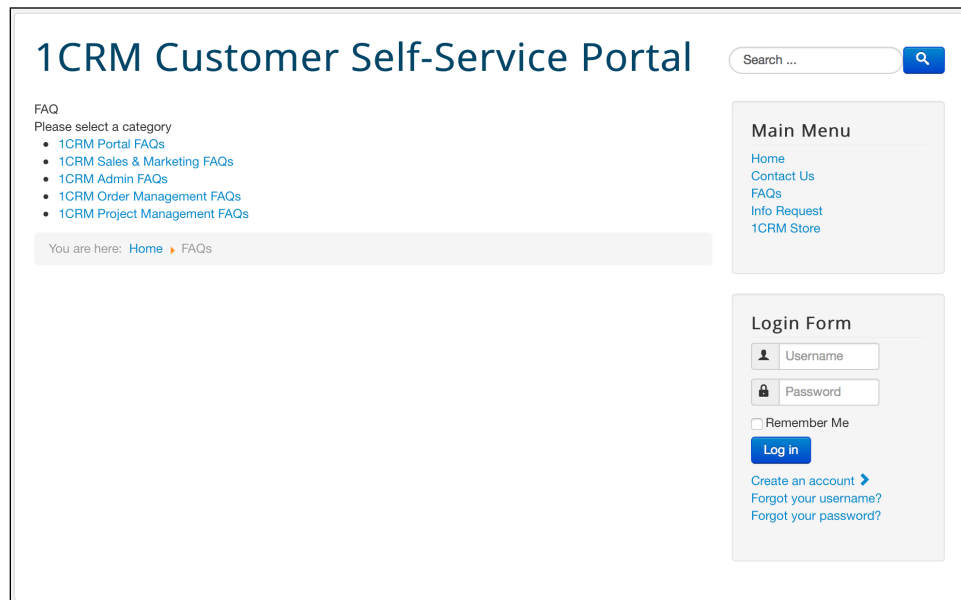
Figure 19: Viewing the FAQ Page as a User

4.0 Using the Self-Service Portal

4.1 Accessing the Self-Service Portal

To access the 1CRM Self-Service Portal, a visitor types the portal URL into your web browser's address bar. You should see a screen similar to the one shown in Figure 20.
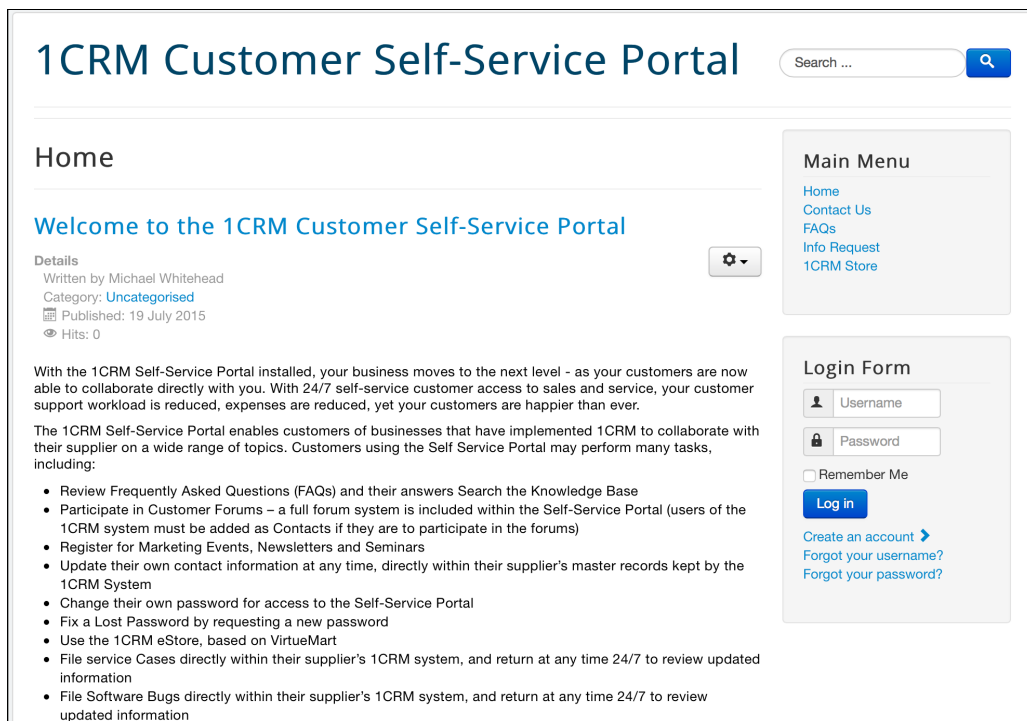
Figure 20: The 1CRM Self-Service Portal Screen (Not Logged In)

This is the 1CRM Self-Service Portal user interface, as seen when you are not logged in. If you do not see a similar screen, verify that you have entered the URL correctly. If you did not make a typing mistake, contact your system administrator to verify that you have the correct URL.

There are several things you can do on this site even if you do not have login information for the site:

- Look up contact information for the business – using the *Contact Us* menu option.
- Request Information, such as information about products and services offered, or pricing.
- Register a login to the Self-Service Portal. This will produce a Lead within the associated 1CRM system, and the new login will be created with **Basic** access privileges.
- Access the eStore.

To register as a user of the Self-Service Portal, click on the *Create an account* link, and complete the screen as shown here:

Figure 21: Registering as a User for the 1CRM Self-Service Portal

Once you click on the *Register* button, you will soon receive an email at the email address provided, which will contain a confirmation link. Simply click on that link to confirm your email address, and enable your **Basic** user access to the 1CRM Self-Service Portal.

4.1.1 To log in to the System...

To perform additional functions in the Self-Service Portal, you must log in to the system by providing a valid user name and password. The figure below shows a user entering their login information on the Login Form:

1. Type your user name in the Username box.
2. Type your password in the Password box. (**Note:** System passwords are case-sensitive.)
3. Click the *Log in* button.
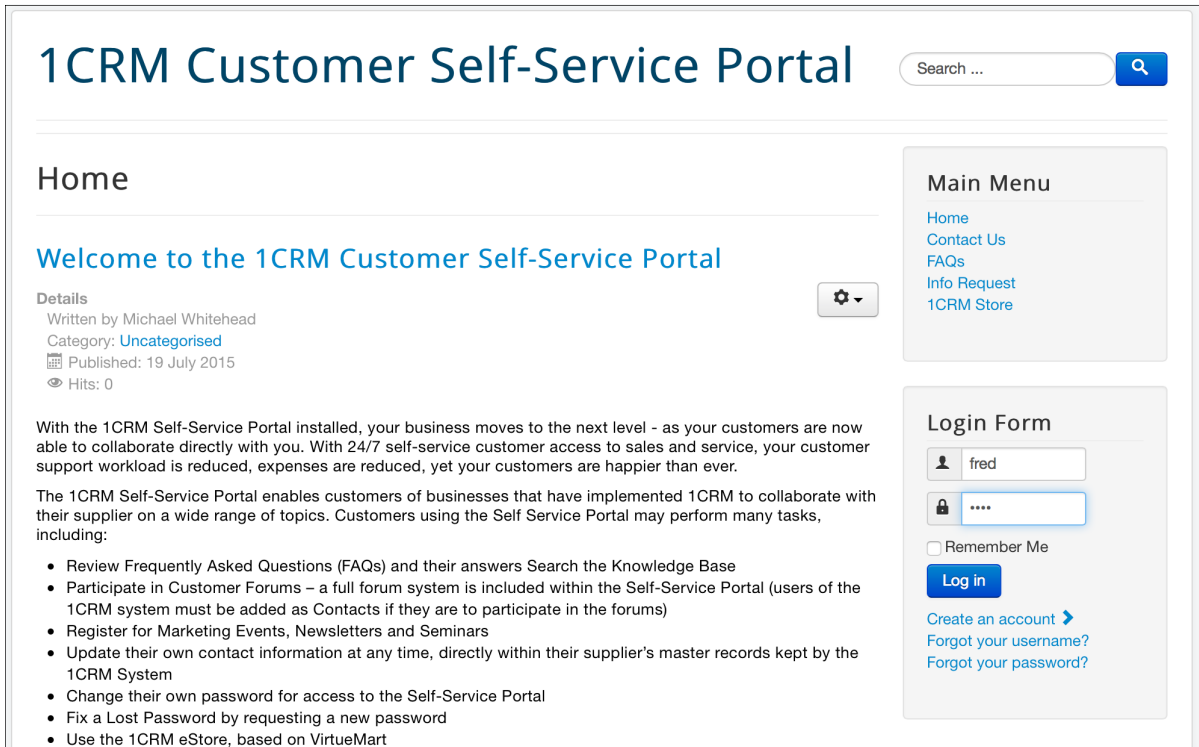
Figure 22: Logging In To The 1CRM Self-Service Portal

4.1.2 If you cannot log in...

• Verify that your username and password were entered correctly, including any capital letters.

• Contact your system administrator to verify that you have the correct username and password combination.

• Your account may have been disabled. Contact your system administrator.

4.1.3 Security Timeout

For security reasons, the system will automatically log you out of the system if you do not perform any tasks for a period of time. By default, the system will not log you out until 30 minutes have elapsed without any activity. (This feature can be turned off, or the time period changed, via configuration parameters set by your Administrator.)

When you are ready to resume working with the system, click any button on the screen. The system will automatically load the log in page for you. You can also close all web browser windows and re-load the log in page manually.

4.2 The Self-Service Portal User Interface

Once the login information has been fully entered, and the user clicks on the *Log in* button, the full Self-Service Portal menu will become available, as shown in the figure below:
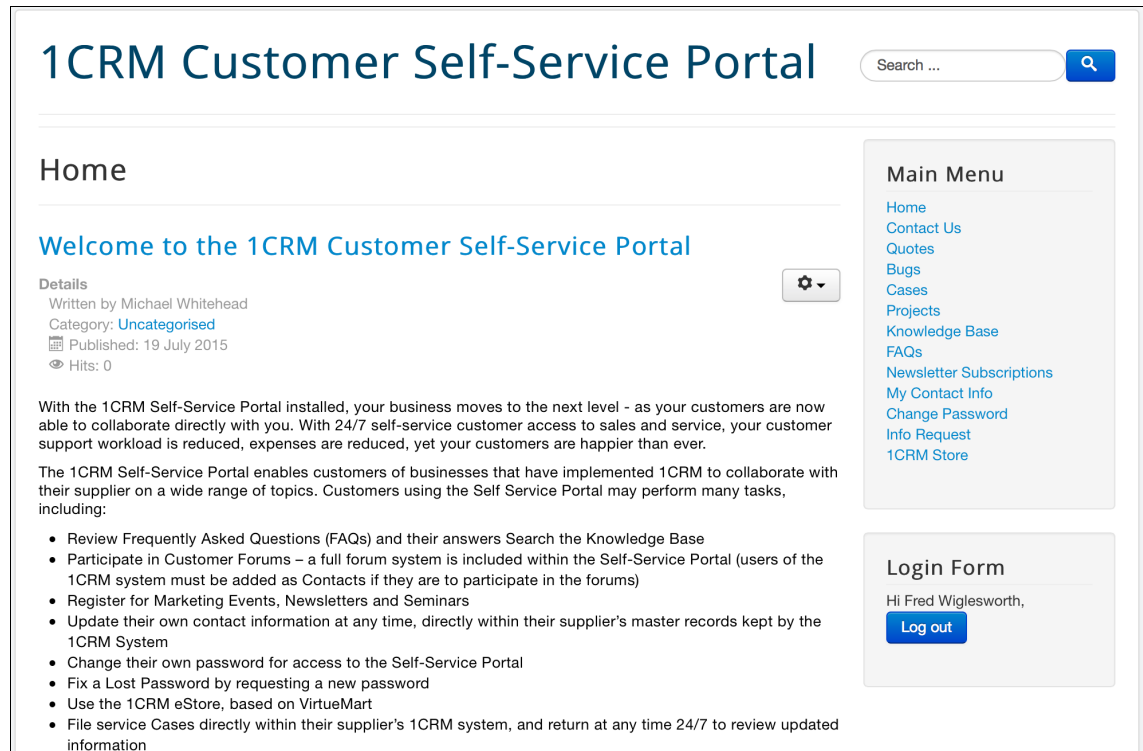
Figure 23: 1CRM Self-Service Portal – Full Menu (Logged In)

Once you are logged in, you can perform many more functions within the Self-Service Portal. Just click on the various choices on the menu system on the left of the screen to choose amongst the many options.

Note: If several of the menu options above are missing (actually, if some are missing, you will probably only have the Menu options *Home*, *Contact Us*, *Info Request*, *FAQs*, *Knowledge Base*, *Events*, *My Contact Info* and *Change Password*) then you are logged in as a **Basic** user. The menu above (which also includes *Cases*, *Software Bugs*, *Projects*, and *Quotes*) will be displayed if you are logged in as a **Full** user.

What is the difference between the two?

- A **Basic** user is created when a visitor to the Self-Service Portal creates a login for themselves. Within the associated 1CRM system, they are entered as a Lead.

- If they already exist as a Contact in the 1CRM system (matched by name and email address) they gain **Full** access.

- If they are converted at a later time to a Contact (and associated Account) within 1CRM, they automatically gain **Full** access to the Self-Service Portal.

- As well, if they purchase anything within the eStore, they will also automatically be converted to a Contact (and associated Account) within 1CRM, and therefore gain **Full** access within the Self-Service Portal.

⮕ 4.2.1 Review FAQs

Using this menu option, the user may review frequently asked questions, and their answers. The user interface is a simple organization of categories, and topics within them. Initially, the screen looks similar to the figure below, depending on what sub-categories you may have created within FAQs.
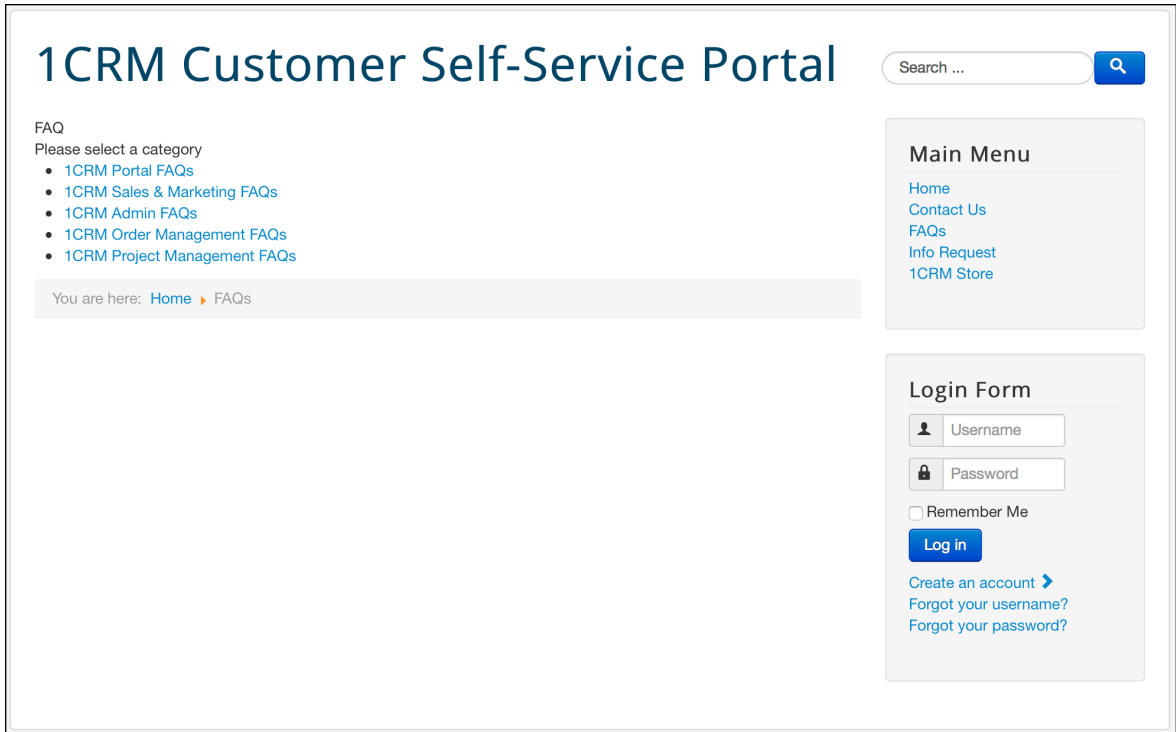
Figure 24: 1CRM Self-Service Portal – Review FAQs

⇨ **4.2.2 Search the Knowledge Base**

Using this menu option, the user may search the Knowledge Base for articles. Articles are organized by search terms called Tags. Each article is 'tagged' with one or more of these search terms. A search begins by selecting an initial Tag to start the search. The user interface is a simple list of Tags - just click on one to begin your search.

Once a Knowledge Base search is in progress, the screen resembles the figure shown below:

1CRM Customer Self-Service Portal

Knowledge Base Articles

Title ▲

CRMSync Authentication Issue
Need to Purchase Additional Licenses
Warning message when using the wrong browser

Display # 20 ⬍

You are here: **Home** ▸ Knowledge Base

Search Criteria

Clear

⊞ 1CRM ❌

Refine Search
Alphabetically :: By Popularity

CRMSync ⊞⊟

Main Menu

Home
Quotes
Bugs
Cases
Projects
Knowledge Base
FAQs
Newsletter Subscriptions
My Contact Info
Change Password
Info Request
1CRM Store

Login Form

Hi Fred Wiglesworth,

Log out

Figure 25: 1CRM Self-Service Portal – Knowledge Base

Articles that match the current search criteria are listed in the middle of the screen, with pagination controls to use if there are multiple pages of matching articles.

The Tags listed in the search criteria area have ⊞ or ⊟ icons before them, and ❌ icons after them. The ⊞ and ⊟ icons show if the Tag is being included or excluded in the search - i.e. if a ⊟ icon is shown, then only articles that *do not* have that Tag are shown in the list of matching articles. The ❌ icon after the Tag is used to remove that Tag from the set of search criteria.

When a search is in progress, use the Refine Search area to change the search criteria. Click on the ⊞ or ⊟ icons after a Tag to include or exclude that Tag from the search results.

4.2.3 File and Review Service Cases

File service Cases directly within the supplier's 1CRM system, and return at any time 24/7 to review updated information from their support staff. Note the links top right to create a new Case, or filter the Cases list view, and client ability to make notes, and/or add attachments.
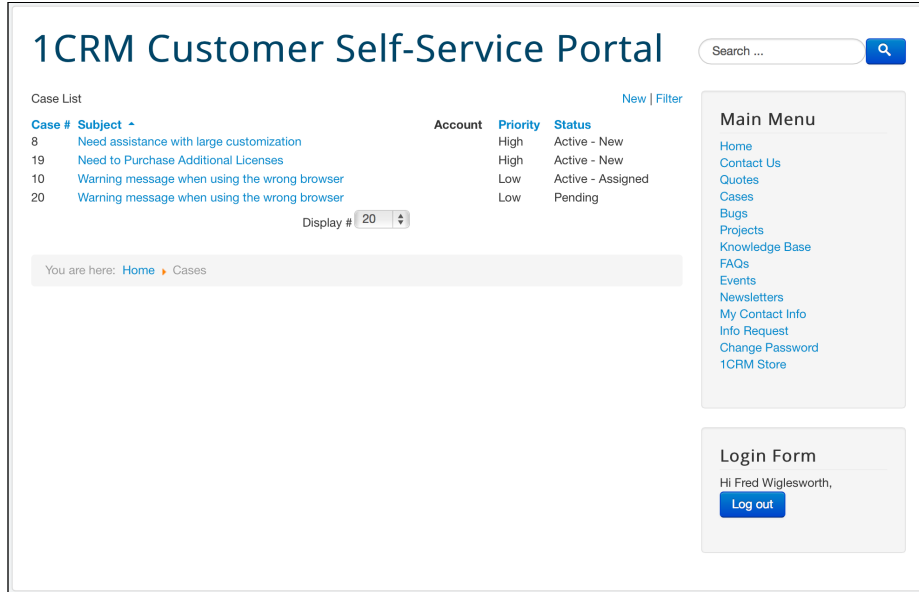
Figure 26: 1CRM Self-Service Portal – Cases List View
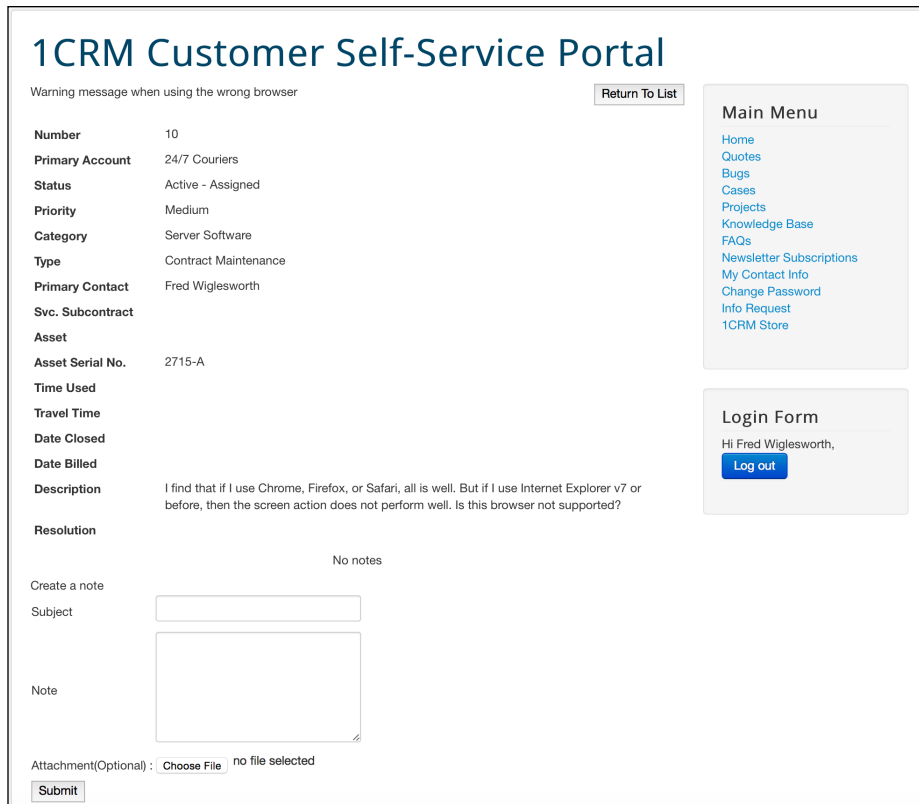
Figure 27: 1CRM Self-Service Portal – Cases Detail View

4.2.4 File and Review Software Bugs

File Software Bugs directly within the supplier's 1CRM system, and return at any time 24/7 to review updated information from their support staff. Note the links top right to create a new Bug, or filter the Bugs list view, and client ability to make notes, and/or add attachments.
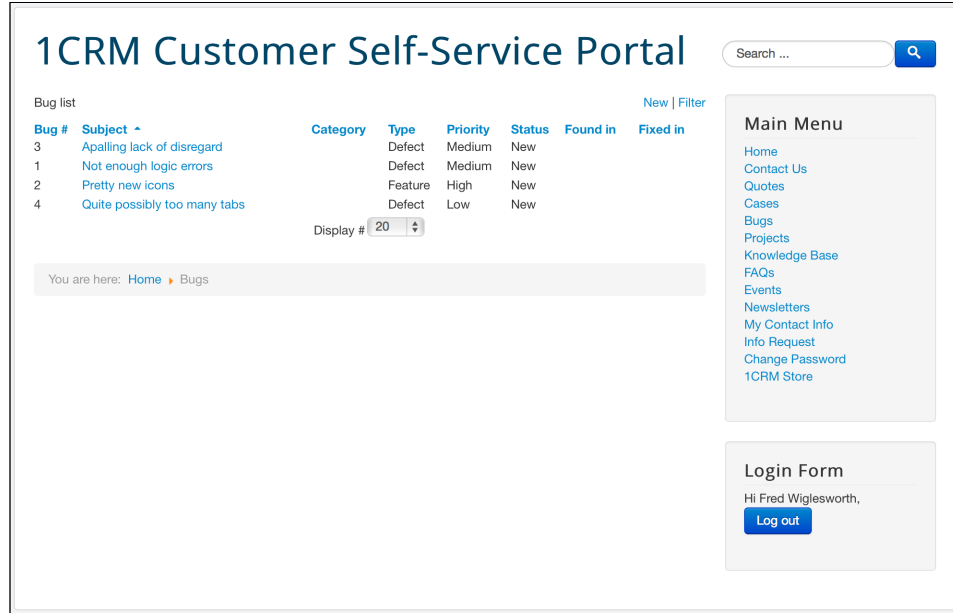
Figure 28: 1CRM Self-Service Portal – Software Bugs List View
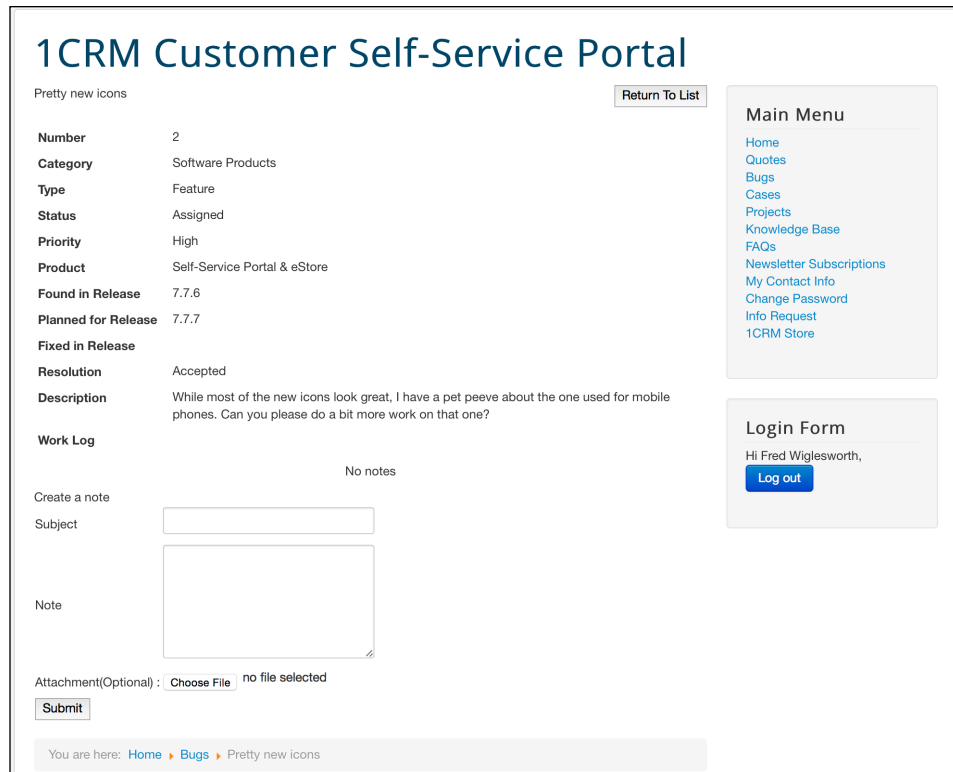
Figure 29: 1CRM Self-Service Portal – Software Bugs Detail View

4.2.5 Collaborate on a Project

Customers may collaborate on projects with their suppliers using this option within the Self-Service Portal:

- The customer can see all the project tasks identified (although some may be hidden from the customer by users of the 1CRM system), and the progress % to date.

- The customer can see all Documents linked to the project, and can add new documents themselves.

- The customer can see Notes related to the project (although some may be hidden from the customer by users of the 1CRM system) – and may add additional notes themselves, optionally with binary file attachments such as Microsoft Office files.

- The customer can see all Contacts related to the project (users must be added as Contacts within the 1CRM system if their contact information is to be exposed in this manner).

The figure below shows the project list view. The user selects a project from the list, and clicks on it. The details of the project selected are then shown in the detail view, as shown in the next figure. Multiple tabs are displayed, and the user clicks on the relevant tab to see the Notes, Tasks, Documents and Contacts that are related to the project.

Figure 30: 1CRM Self-Service Portal – Projects List View

1CRM Customer Self-Service Portal

Contract with XY&Z Funding Inc 2

Return To List

Start Date	2015-03-28
End Date	2015-08-14
Status	Active - In Progress
Progress (%)	22
Description	This is a brief feasibility study.

Notes | Project Tasks | **Documents** | Contacts

Confidentiality and Invention Agreement, created **2015-07-11 12:41** (revision)

Non-Disclosure and Non-Compete Agreement, created **2015-07-11 12:41** (revision)

Partnership Agreement, created **2015-07-11 12:41** (revision)

Upload Document

Name

Description:

Attachment [Choose File] no file selected

Submit

Main Menu

Home
Quotes
Bugs
Cases
Projects
Knowledge Base
FAQs
Newsletter Subscriptions
My Contact Info
Change Password
Info Request
1CRM Store

Login Form

Hi Fred Wiglesworth,

Log out

Figure 31: 1CRM Self-Service Portal – Project Detail View

4.2.6 Review and Comment on Quotes

Using this option, customers may review their Quotes at any time. (**Note:** The Quote must have the portal user as the Shipping or Billing contact in order for them to see the Quote.) The system also provides the ability to attach a note to a Quote to provide feedback. Simply enter the note, optionally browse for and link an attachment, and click on the Submit button.
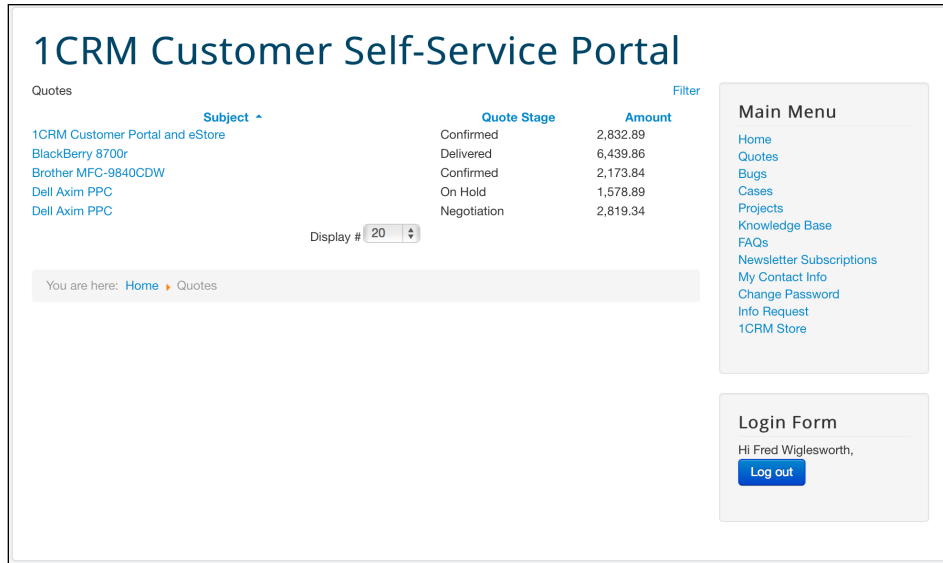
Figure 32: 1CRM Self-Service Portal – Quote List View
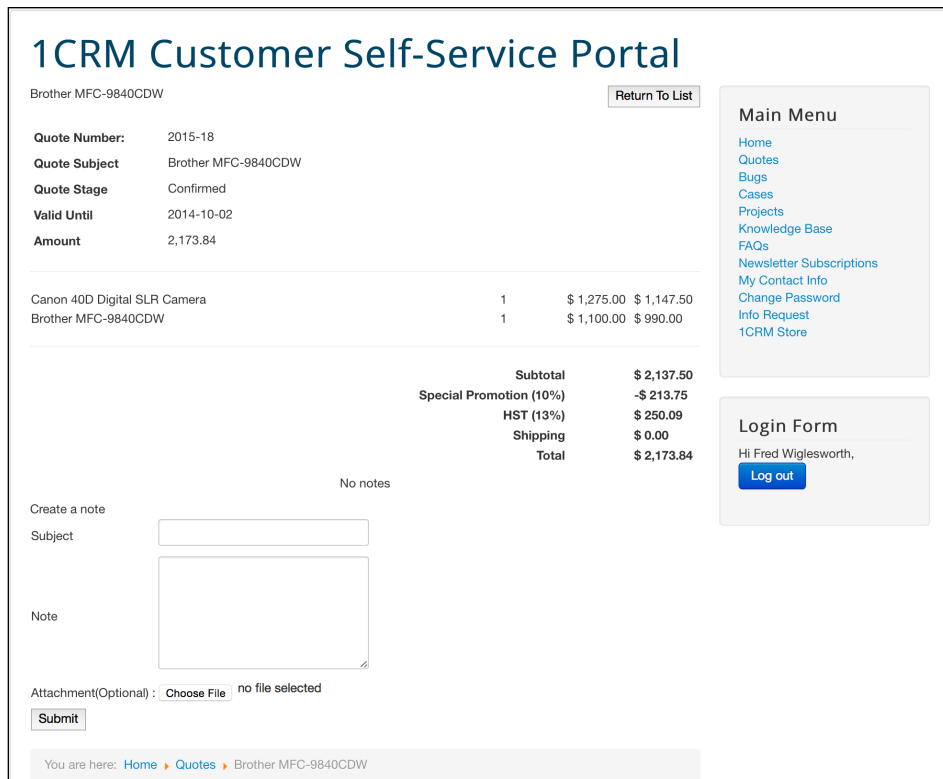
Figure 33: 1CRM Self-Service Portal – Quote Detail View

➡ **4.2.7 Register for Events**

Using this option, customers (both *Basic* and *Full* users of the Self-Service Portal) may register for a Marketing Event at any time, directly within their supplier's 1CRM system. Just select the Event you are interested in, from a screen resembling that shown in the figure below.

Having selected an Event, on the next screen (see Figure 35) simply click on the *Register for this Event* button, or on the *Return to List* button to exit.

Inside 1CRM, Events will show all registered Leads and Contacts, and reminder emails may be scheduled to go out to all attendees.

Also note that while they are called Events, in actual fact these items may also include all types of marketing items or activities - such as newsletters that clients wish to register to receive, product brochures, etc...

Figure 34: 1CRM Self-Service Portal – List of Events

Figure 35: 1CRM Self-Service Portal – Register for an Event

4.2.8 Manage Subscriptions to Newsletters

Using the *Newsletters* option, customers may subscribe to your various newsletters. Simply check the boxes as shown in the figure below, and click on the *Save* button.

Figure 36: 1CRM Self-Service Portal – Newsletter Subscriptions

4.2.9 Request Information

Using this option, customers may request information at any time. Simply fill in the form as shown in the figure below, and click on the *Submit* button. There are two different forms depending on if the user is logged in or not (and therefore on whether the Portal already has their contact information or not). When any user requests information, an email is sent to the Portal's admin email address (see Figure 16) with their message in the email body and the subject *Information Request*. If the user making the request is not logged in, and their email address is not found in the Leads in the CRM, a new Lead is created.

Figure 37: 1CRM Self-Service Portal – Request Information (Not Logged In)

Figure 38: 1CRM Self-Service Portal – Request Information (Logged In)

➡ 4.2.10 Update Your Own Contact Info

Using this option, customers may update their own contact information at any time, directly within their supplier's master records as kept by the 1CRM system. Just enter the corrected information, and click on the diskette icon (top right) to save the new information.

Figure 39: 1CRM Self-Service Portal – My Contact Info

4.2.11 Change Your Password

Using this option, customers may change their password at any time. Just enter the new password, confirm, and click on the diskette icon (top right) to save the new password.

Figure 40: 1CRM Self-Service Portal – Change Password

4.2.12 Lost Password

Using this option, customers may request that a new password be emailed to them, if they have lost their current password. Just enter the username and email address, and click on the *Send Password* button to have the email sent immediately.

Figure 41: 1CRM Self-Service Portal – Lost Password

➲ 4.2.13 Search for Information

You can search for information in the Self-Service Portal at any time –

- Click on the Search box at top right
- Fill in text and press Enter, to indicate data you are looking for (see figure below for an example of Search results)

Figure 42: 1CRM Self-Service Portal – Searching for Information

➡ 4.2.14 Shop at the eStore

If the VirtueMart-based eStore is in use in your portal then there are a lot of new features that become available to the user. At the top of the screen you can browse products in the online store by Category (in this case, categories such as Computer Equipment, Photographic Equipment, etc..). You can also click on Top Ten or Latest Products to a cross section of products in all categories. Each product is presented together with an image as defined in the 1CRM system.
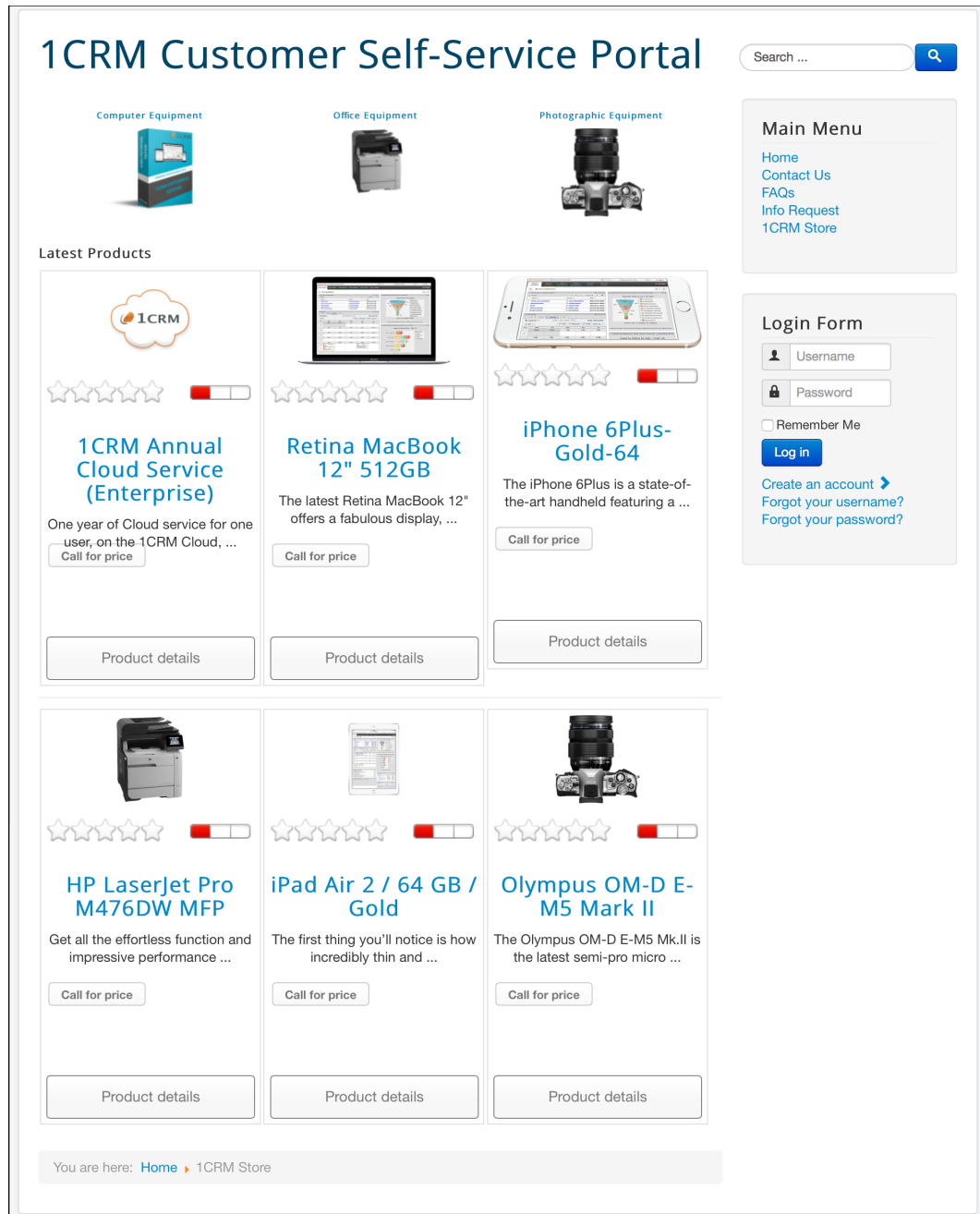
Figure 43: eStore Shopping in the Self-Service Portal

Click on the *Add to Cart* button to purchase any item. When you do so, you will see this screen:
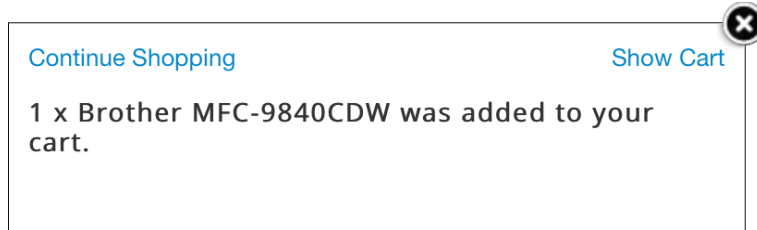
Figure 44: eStore Shopping Cart

If you decide to checkout, click on the *Show Cart* link, and you'll see a screen similar to the one in the Figure below. Simply complete the registration information, and then continue along the steps indicated to select shipping and payment methods, and then complete your order.
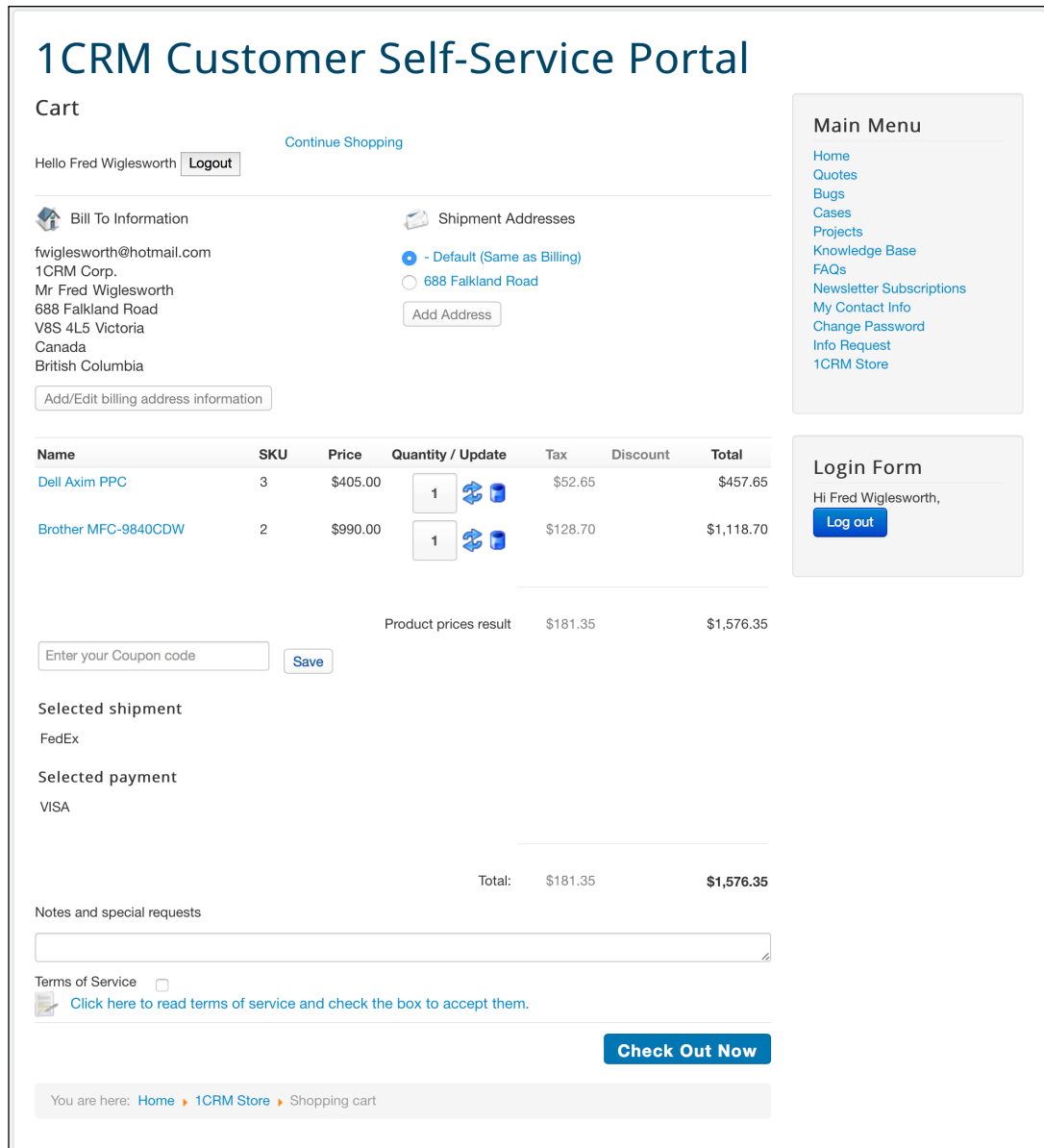
Figure 45: eStore Checkout

4.3 Partner Access to the Portal

When Partners use the Self-Service Portal, it is possible for them to see not only the normal customer data shown there, but also special partner data. The additional partner functions allow partners to view the Leads, Accounts, Opportunities and Invoices associated to them within the 1CRM system, and also to enter new leads (see Figure 47).

Note: In order for a portal user to be recognized as someone permitted to view partner-specific data within the Self-Service Portal, they must have their contact added to the *Portal Authorized Contacts* sub-panel on the detail view for their partner record within 1CRM, as seen in the Figure below. Any Contacts within 1CRM that are associated with the Account that is linked to the Partner record will only get normal portal access, unless they are specifically added to the *Portal Authorized Contacts* sub-panel on the Partner record. This allows some employees of the partner company to get the enhanced partner access to the Self-Service portal while others do not.

Figure 46: The Partners Module Detail View and Portal Authorized Contacts

1CRM Customer Self-Service Portal

Search ... 🔍

Return To List

Salutation	Mr.
First Name	J. Rennie
Last Name	Whitehead
Email	drrennie@sympatico.ca
Account Name	P.A. Lapp & Associates
Title	Partner
Department	Policy Consulting
Status	New
Lead Source	Self Generated
Lead Source Description	Canvassed the building
Primary Address Street	1368 Chattaway Avenue
Primary Address City	Ottawa
Primary Address State	Ontario
Primary Address Postalcode	K1H 7S3
Primary Address Country	Canada
Alt Address Street	
Alt Address City	
Alt Address State	
Alt Address Postalcode	
Alt Address Country	
Home Phone	(613) 731-6536
Office Phone	
Mobile	
Fax Number	
Other Phone	
Description	

Save

Main Menu

Home
Contact Us
Quotes
Cases
Bugs
Projects
Knowledge Base
FAQs
Events
Newsletters
My Contact Info
Info Request
Change Password
1CRM Store
Leads
Accounts
Opportunities
Invoices

Login Form

Hi Fred Wiglesworth,

Log out

You are here: **Home** ▸ Leads

Figure 47: Partner Portal Access - Adding a New Lead

→ 4.3.1 Review and Comment On Invoices

Using this option, customers with partner access may review their related Invoices and Payments at any time. The system also provides the ability to attach a note to an Invoice to provide feedback. Simply enter the Note, optionally browse for and link an attachment, and click on the *Submit* button.
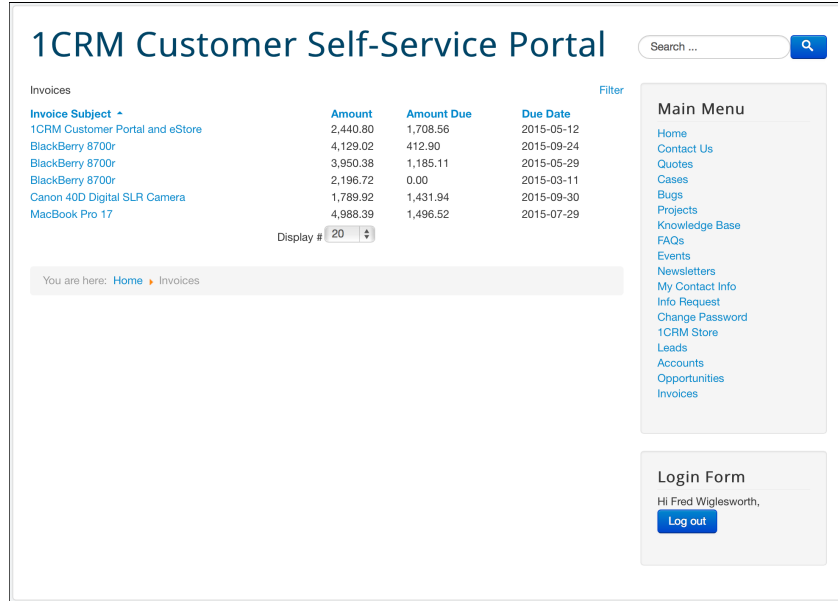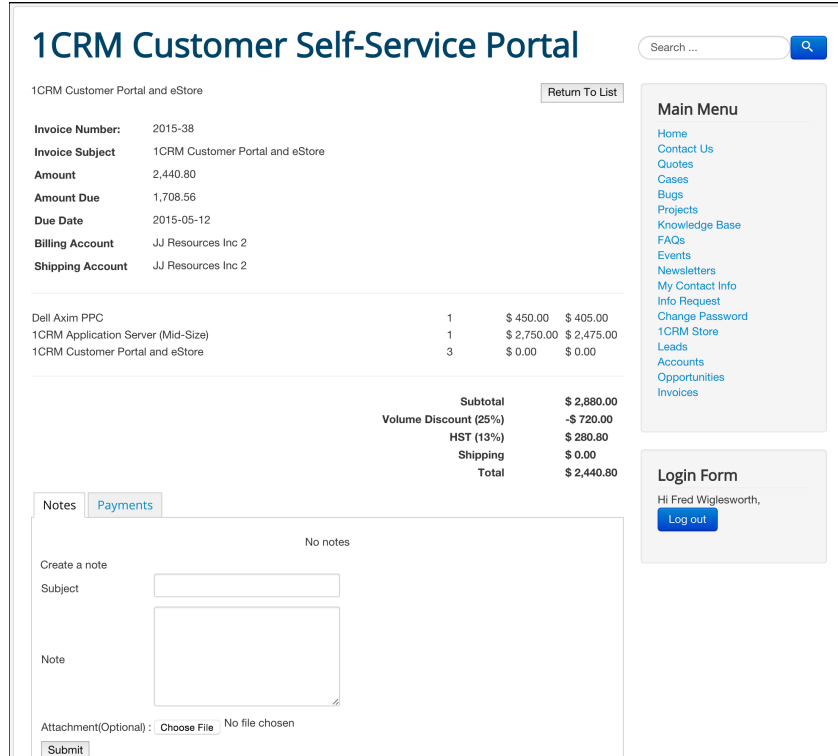
Figure 48: 1CRM Self-Service Portal – Invoices List View

Figure 49: 1CRM Self-Service Portal – Invoices Detail View

4.4 Logging Out of the System

When you are finished working with the system, you should always log out of the system rather than just closing your web browser.

When a user logs out, the system performs several 'clean-up' procedures, and then automatically returns the web browser window to a logged out status, with the smaller set of menu options.

To log out…

1. Click the *Logout* button in the Login form.

2. If desired, you may now close the browser.

1CRM SELF-SERVICE PORTAL GUIDE

A Comprehensive Guide to Implementing Administering & Using the 1CRM Portal