



Customer Self-Service Portal (CSSP)

General Overview



The Portal: Defined

Your portal-enabled customers can...

- Maintain accurate contact information
- Interact directly with your support reps via the cases and bugs modules
- Subscribe to newsletters published through the CRM application
- Access Knowledge Base articles and FAQ's created by your KB Administrator

Benefits

- Reduce potential service lapses caused by inaccurate data
- Reduce amount of time lost addressing inaccurately relayed information
- Effectively deliver your message to prospects & customers with a single tool
- Time spent answering basic questions is freed to solve unique, more complex customer issues

Maintain clean bi-directional contact data

Home Cases Bug Tracker Newsletters Knowledge Base FAQ [My Account](#)

My Account

[Edit](#)

Title:	Senior Consultant	Salutation:	Ms.
First Name:	Ilene	Last Name:	Marvel
Primary Address Street:	9550 West Brady Blvd		
Primary Address City:	New York	Primary Address State:	NY
Primary Address Postal Code:	10282	Primary Address Country:	USA
Office Phone:	+1 (212) 432-7428		
Email:	Ilene_Marvel@bankofgeorgia.com		

© 2004



'My Account' Screen
(updatable by portal-enabled contact)



CRM Contact Record



Contacts: Ms. Ilene Marvel

[Edit](#) [Duplicate](#) [Delete](#) [Find Duplicates](#) [Manage Subscriptions](#) [View Change Log](#)

Name:	Ms. Ilene Marvel vCard	Office Phone:	+1 (212) 432-7428
Account Name:	Bank of Georgia	Mobile:	+1 (212) 870-6776
Lead Source:	Campaign - SMB target Webinar	Home:	+1 (212) 843-9219
Campaign:		Other Phone:	+1 (212) 716-1442
Title:	Senior Consultant	Fax:	+1 (212) 060-0116
Department:	Professional Services	Birthdate:	
Reports To:		Assistant:	Leeann Kegley
Sync to Outlook®:	<input type="checkbox"/>	Assistant Phone:	+1 (212) 536-1165
Do Not Call:	<input checked="" type="checkbox"/>	Date Modified:	06/01/2009 10:55am
Team:	USA East Region	Date Created:	02/12/2006 01:50pm
Assigned to:	kirsten	Other Address:	9550 West Brady Blvd New York NY 10282 USA
Primary Address:	9550 West Brady Blvd New York NY 10282 USA	Portal Active:	<input checked="" type="checkbox"/>
Portal Name:	Ilene.Marvel		
Description:			
Email:	Ilene_Marvel@bankofgeorgia.com (Primary)		

Sample CSSP/website integration

TPS

- About TPS
- Features
- News
- The Community
- Contact Us
- Customer Support

Main Menu

- » Home
- » Company Overview
- » TPS Products
- » More about TPS
- » FAQ
- » The News
- » Web Links
- » News Feeds

Key Concepts

- » Extensions
- » Content Layouts
- » Example Pages

Designed by:
 Joomla Templates
Website hosting

Customer Support

- Home
- Cases
- Bug Tracker
- Newsletters
- Knowledge Base
- FAQ

[My Account](#) | [Logout](#)

User Name:

Password:

[New user? Please register](#)

Sugar Portal is a framework which provides real-time view of cases, bugs & newsletters etc to customers. This is an external facing interface to Sugar that can be deployed within any website. 5.2.0c version of the application also provides customization capabilities using the core Sugar studio tool. Stay tuned for more customer self service features like FAQ, Knowledge base, Project Management and Forums in our future releases.

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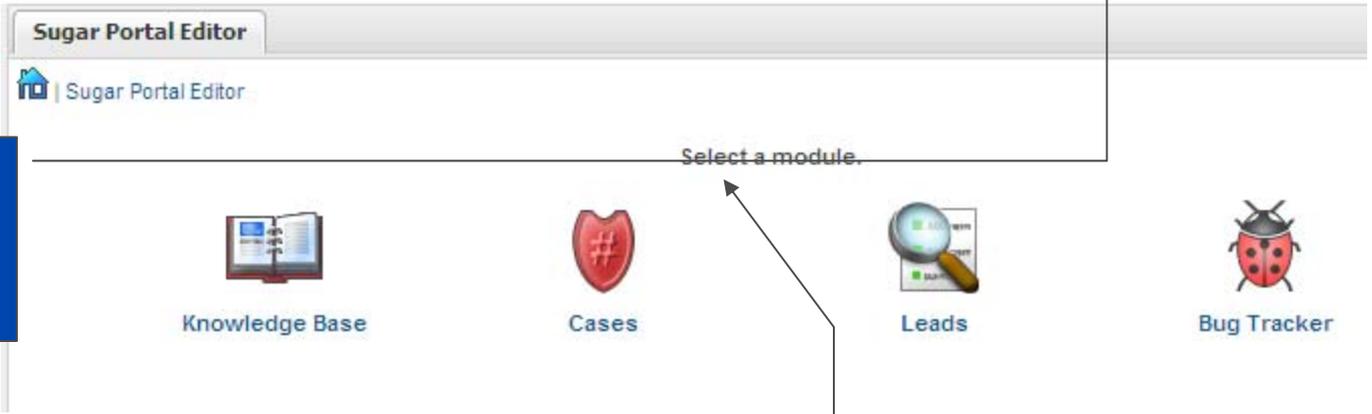


CSSP embedded cleanly as iFrame directly into your website

Customize and update CSSP from within SugarCRM



Apply pre-defined styles for a consistent customer experience



You define which fields are relevant to your customers' experience using the layout editor

Your customers connected to your service organizations

Customer Support

In addition to cases you can tab through to other self service tools

Home

Cases

Bug Tracker

Newsletters

Knowledge Base

FAQ

[My Account](#)

[Create New](#) | [List](#)

Cases

Create new support tickets

Number:

Subject:

Status:

New
Assigned
Closed
Pending Input
Rejected

Priority:

High
Medium
Low

Search

Start Previous (1 - 2 of

Number	Subject	Account Name	Priority	Status
174066	I think some equipment is broken	Bank of Georgia	High	Closed
548219	I think some equipment is broken	Bank of Georgia	High	Assigned

Start Previous (1 - 2 of

Review existing cases from list view

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Internal Knowledge Base module

Shortcuts

Create Article

Mail Merge

Articles

Knowledge Base Admin

KNOWLEDGE BASE

Search

Browse

Advanced

Syntax Help

Search within: All

Search

Clear

Top Ten Most Viewed Articles

Title	Frequency	Approver Name	Auth
Sugar 4.5.1 FAQ and KB module - Capabilities	47	admin	adm
Is there a way to automatically install and configure my Linksys products?	38	admin	adm
How do I recover my router if something goes wrong?	36	admin	adm
How do I Setup pages to upgrade firmware?	34	admin	adm
Issue - Resolution	33	admin	adm
How do I change the default IP address on a WRT54G Wireless-G Broadband Router?	30	admin	adm
How do I change the default IP address on a WRT54G Wireless-G Broadband Router?	24	admin	adm
How do I change the default IP address on a WRT54G Wireless-G Broadband Router?	18	admin	adm
How do I change the default IP address on a WRT54G Wireless-G Broadband Router?	14	admin	adm
How do I change the default IP address on a WRT54G Wireless-G Broadband Router?	6	admin	adm

KNOWLEDGE BASE ADMIN

--Admin Actions--

Select an action

--Admin Actions--

Create New Tag

Delete Tag

Rename Tag

Move Selected Articles

Apply Tags To Articles

Delete Selected Articles

Security(1)

Product Catalog(0)

CS3 Routers(1)

Linksys Routers(1)

Netgear Routers(1)

Wireless Routers(0)

Theme Sugar

Knowledge Base articles via CSSP

Home Cases Bug Tracker Newsletters **Knowledge Base** FAQ

Knowledge Articles: Home

Document Name:

Keywords:

Most Viewed Articles

Start Previous

Document Name	Publish Date	Created by
How do I upgrade the firmware on a WRT54G Wireless-G Broadband Router?	2008-01-04	Administrator
# How do I setup a static IP address that will work with my router?	2008-01-04	Administrator
I am getting an error saying.	2008-01-04	Administrator
Sugar 4.5.1 FAQ and KB module - Capabilities	2008-01-04	Administrator
The Sweet Stuff is Sugar Exchange	2008-01-04	Administrator
What is Management Mode? How do I recover my router if something goes wrong and I cannot access the Setup pages to upgrade firmware?	2008-01-04	Administrator

Increase awareness via newsletter subscription

Home Cases Bug Tracker **Newsletters** Knowledge Base FAQ

Check the box to subscribe to the corresponding newsletter.

Save Check All Uncheck All

<input checked="" type="checkbox"/>	Monthly Newsletter
<input type="checkbox"/>	Quarterly Newsletter
<input type="checkbox"/>	Annual Newsletter

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Active Campaigns of type 'Newsletter' exposed in CSSP for general consumption

Simple access management via contacts module

Description Information

Description:

Portal Information

Portal Name: Portal Active: *

Portal Password:

Confirm Portal Password:

Theme

Server response time: 0.19 seconds.
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Advanced CSSP features

Cases: Issue with service

Edit Duplicate Delete Find Duplicates **Create Article** View Change Log

Case Number:	504667
Priority:	Low
Status:	Closed
Type:	
Subject:	Issue with service
Description:	User is currently experiencing erratic behavior. Please call custo
Resolution:	The item had to be sent back in for repair

- Quickly create KB articles directly from commonly occurring support tickets

Updated: Case 7613 - Lost Password! - Message (Plain Text)

File Edit View Insert Format Tools Actions Help Adobe PDF

Reply Reply to All Forward Print Forward Archive to Sugar

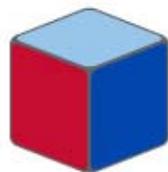
Extra line breaks in this message were removed.

From: Drew Currie [drew@sugarcrm.com]
To: 'Drew Currie'
Cc:
Subject: Updated: Case 7613 - Lost Password!

Case 7613 has been updated by daniel (* denotes an updated field).

Subject: Lost Password!
monitored or recorded
Created By: drew
(* Assigned To: daniel
Priority: P3 - General Issue
(* Status: Assigned
(* Work Log: 2009.5.4 Daniel - Good call. This is a very easy thing to accomplish, your password has been reset.
Open the case via portal to see your new password.

- Pre-define when your customers service reps are notified via email.



SUGARCRM[®]

THE CLOUD IS OPEN