

Podcast Script: Sugar Portal (Part 1)

Welcome to this 60 second Sugar snippet. Today Lori from Sugar's Technical Support team will present part 1 of her two part series on the Sugar Portal.

(Lori) Sugar Portal is available for the enterprise and professional editions and is a self-service portal that allows your users and contacts to view, cases, bugs and knowledgebase articles. The sugar Portal also enables your users and contacts to create and edit cases and bugs in Sugar.

Sugar Portal uses SOAP to communicate with Sugar. The communication between your browser and Sugar Portal is facilitated with an iFrame. Webmasters only need to place a small piece of JavaScript code where they want the iFrame to appear. An example javascript code will be displayed at the end of the install process. Be sure to copy that code before completing the install.

Before installing Sugar Portal, you will need to perform the following steps to ensure a successful install:

1. Enable Portal in Admin → system settings
2. License management needs portal users to be greater than zero
1. 3, a user needs to be created, set to active and set to Portal user.

If you are installing on the same web server as the Sugar server, use a non-default sessions directory for Portal.

Cases and bugs that are created from the Sugar Portal are stored in the Sugar database on the Sugar server and displays in Sugar. Users cannot delete a record from Sugar Portal, but they can do so when they log into Sugar directly.

Use Studio for Portal within the Sugar server to customize the fields available for use in Portal to define the DetailView, EditView, and ListView layouts. You can also upload a style sheet to match your website's branding.

Synchronize Portal within the server's Studio to push customizations to the Portal. This allows for multiple Portals installed against one server, and allows you to customize each portal in different ways.

You will also need to enable a portal login for your customers within the contact record. Be sure to Set a Portal Name and Password and check the Set Portal Active checkbox.

Contacts can modify some of their contact information through the My Account link in Sugar Portal. When a contact modifies information, the contact record is updated in the Sugar server as well as notifies the contact assigned to user that a change occurred.

New user registrations from the portal will submit a Lead to the Sugar server and the Lead will need to be converted to a Contact and be enabled for Portal use.

This concludes part 1 of the Sugar Portal. Please stay tuned next week for part 2 of Sugar portal. For more information, please refer to the Installation and Administration Guide.

(Susie) And that's your 60 second Sugar snippet. Goodbye!