

## Podcast Script: Sugar Portal (Part 2)

(Susie)

Welcome to this 60 Second Sugar Snippet. Today, Lori from Sugar's Technical Support team will present the conclusion of her two part series on the Sugar Portal.

(Lori)

Last week in sugar portal part 1, we discussed installing the Sugar Portal, customizing the portal within studio, and setting up contacts to access the portal. We will begin today's session discussing cases and bugs. Customers can use Sugar Portal to submit new Cases and Bugs to your Sugar server. Notes can be appended to the Cases and Bugs to supply additional information or ongoing communication and can include file attachments such as screenshots or log files. When adding a note to a case from the Sugar server, you can choose whether or not the note will be made visible to customers through Sugar Portal for two-way communication. Customers can use Sugar Portal to search through existing Cases and Bugs and can only see and access Cases and Bugs that they are associated to. By default, Cases and Bugs are assigned in Sugar to the assigned user for the Contact. You can use Workflow or custom logic hooks to change the default assignments.

Through the Portal, a customer can manage their subscriptions to your Newsletter campaigns. The subscriptions display in the Contact section of the Newsletter's Target List. This only applies to campaigns of type Newsletter.

Knowledgebase Articles are available in the Knowledge Base tab of Sugar Portal. In order for the knowledgebase article within the Sugar server to display in the portal, you must check the external article checkbox, set the status to Published and set the expiration date to some time in the future.

If the FAQ tag is on the article, then the article will also appear in the FAQ section of Sugar Portal. Keep in mind that an FAQ item will always appear in the Knowledge Base section; but a knowledgebase article will not necessarily appear in the FAQ section

Whenever a knowledgebase article is opened in Sugar Portal, the Frequency value within the Sugar server is incremented. Clicking on an FAQ title within Sugar Portal will not update the Frequency value

Whenever a knowledgebase article is opened by an internal user within the Sugar server, the Frequency value is also updated. Sugar Portal will display the Top Ten most viewed articles and the Top Ten most recently modified articles.

This concludes part two of Sugar Portal. For more information, please refer to the Installation and Administration Guide.

(Susie)

And that's your 60 Second Sugar Snippet. Goodbye!