# Creatio Portal

# User guide

ACCELERATE

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# Portal

Creatio portal is a component that provides a way to open up various parts of your system to external users (e.g., customers, partners, contractors, stakeholders or even teams within your company).

The portal eases your administrative load by freeing up various communication channels (e.g., phone or email), and deflects incoming requests by empowering external users to resolve incidents, service requests and other types of inquiries on their own, easing the workload of your support service.

In Creatio, a portal is a custom branded workplace that provides secure and managed access for various types of "portal users." A single interface creates a "one-stop-shop" for both your employees and external users, provides familiar configuration tools (e.g., business processes, access permissions), and creates a subset of Creatio with refined and curated content and available functionality.

Through the portal, Creatio users can access selected sections. They can view, edit, or create records or add notes and attachments.

Creatio portal can help you to facilitate long-term relationships with partners, contractors, stakeholders, and customers, and is designed for various use cases and business scenarios.

## Portal features and use cases

Creatio portal is suitable for a variety of use cases, the most common being:

- Customer self-service, such as in technical support. Give a self-service option to your customers and focus the time and expertise of your support agents on important tasks. Empower your customers to submit support cases and track the resolution progress directly on the portal. Provide them access to your knowledge base articles and help them find answers quickly. Service multiple customers at once avoiding queues and loss in productivity.
- Communications with internal and external customers, for instance, an HR portal. Configure the ability to service external employees and contractors who do not actively use Creatio: create applications, submit them for approval and track their progress. An HR portal can act as a central hub for all the important company documents and policies that are in the public domain.
- Interaction with external users (clients, dealers, and partners) at all sales stages. Create partner programs, process leads and close opportunities along with your partners by using lead management and corporate sales processes. Keep track of the partner tiers, training sessions, and certified experts.

Three portal configurations facilitate the most common use cases - self-service portal, customer portal, and partner portal. You can use them at the same time.

> NOTE
> The list of sections available in the Creatio portal depends on its configuration.

Learn more about various portal configurations and their use cases in the following articles: "Self-service portal", "Customer portal", and "Partner portal".

## Portal licensing

Each portal user "consumes" a special "portal license" (as opposed to using regular Creatio licenses).

The following licenses are required for each user of different portal editions:

| | |
|---|---|
| For the customer portal | customer portal on-site/cloud |

| | |
|---|---|
| For the self-service portal | self-service portal on-site/cloud |
| For the partner portal | partner portal on-site/cloud |

NOTE

Learn more about licensing in the "Software licensing" and "License distribution" articles.

## Portal customization

- Managing portal sections. Read more >>>
- Managing portal users. Read more >>>
- Maintaining data integrity by managing access permissions to portal sections. Read more >>>
- Setting up the portal main page to reflect the nature of your brand. Read more >>>
- Setting up a partner program on the portal. Read more >>>

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# Self-service portal

The self-service portal is available in Service Creatio customer center, Service Creatio enterprise, and Financial Services Creatio customer journey.

The self-service portal can act as a primary means of supporting users or as an extension of your support service. On the self-service portal, users can find answers to their questions in the knowledge base, create and track the progress of their support cases or communicate with the support staff via the feed. Unlike support agents, self-service capabilities and information are available to your customers 24/7. The self-service portal configuration enables you to add the following sections to the portal:

- The [Portal Cases] section, where portal users can register support cases on their own, as well as track the case resolution progress and communicate with support employees.

  The [Portal Cases] section is a counterpart to the [Cases] section in the main Creatio application. You can choose which fields and details from the [Cases] section to display in the [Portal Cases] section via the Section Wizard.
- The [Portal Knowledge base] section, where portal users can receive reference information, search for answers to frequently asked questions, find rules and regulations, templates or advertising materials.

  NOTE

  You cannot add custom sections to the self-service portal. However, you can customize the base sections.

SEE ALSO

- Customer portal
- Partner portal

# Customer portal

The customer portal is available in all Creatio products.

The customer portal configuration is designed for process automation, e.g., providing services, confirming applications and service requests, etc. You can add custom sections to the customer portal to automate any internal process. All custom logic in these sections will be available to the portal users. Configure business processes and cases on the portal to automate mundane administrative tasks. Customer portal users can securely access all process-related functions, including:

- Initiate processes, e.g., create applications, requests, etc.
- Participate in processes, e.g., approve requests.

You can add up to three custom sections on the customer portal. Custom sections are configured via the Section Wizard and are added to the "Portal" workplace.

> NOTE
> Custom sections are created from scratch with no or minimal connection to base Creatio sections. Learn more about creating custom sections on the portal in a separate article.

The customer portal configuration in Financial Services Creatio, customer journey edition, enables you to add the [Applications] and [Contracts] sections to the portal. Additionally, you can add the [Documents] section if your Creatio product supports it.

> NOTE
> You can use the self-service and customer portal together to set up a support service channel and add up to 3 custom sections on top.

### SEE ALSO

- Self-service portal
- Partner portal

# Partner portal

The partner portal is available in Sales Creatio enterprise and Creatio CRM Bundle.

The partner portal is designed for companies that work with customers via partner networks. This portal is a joint communication platform for passing leads between partners and partner cross-sales.

The partner portal works with three primary types of entities: partners, partnerships and partner programs.

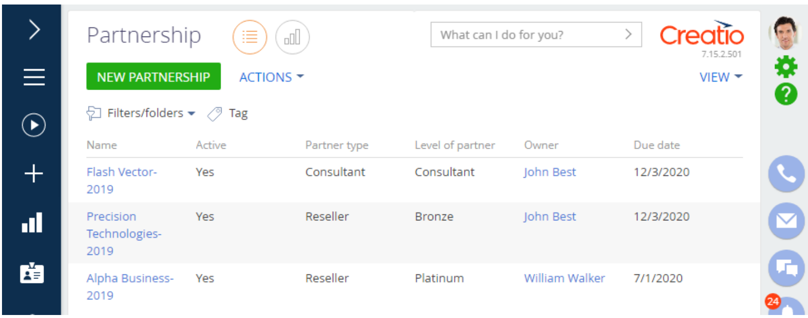
A partner in Creatio is an account of the "Partner" type that is bound to a portal organization and any portal user linked to such an organization. You can find all basic partner data (name, type, address, primary contact person, communication options and more) in the [Accounts] section of the main application. A partner can work with your customers on your behalf using the partner portal.

NOTE

To access the "Partner portal" configuration, the partner organization must be added to the "Partner portal users" functional role. You can read more about the types of portal users in the "Users and permissions on the portal" article.

A partnership is a representation of the current status of your and your partner's cooperation. You can find the data about your company's partners and related partnerships (their conditions and status) in the [Partnership] section of the main application. This section is best suited for use by your employees responsible for interaction with your partners. You can use it to set up the cooperation conditions and add as many partnerships as needed but no more than one per each partner (Fig. 1). The partner portal displays the conditions of an individual partnership as a partner program.

**Fig. 1** The [Partnership] section in the main application




NOTE

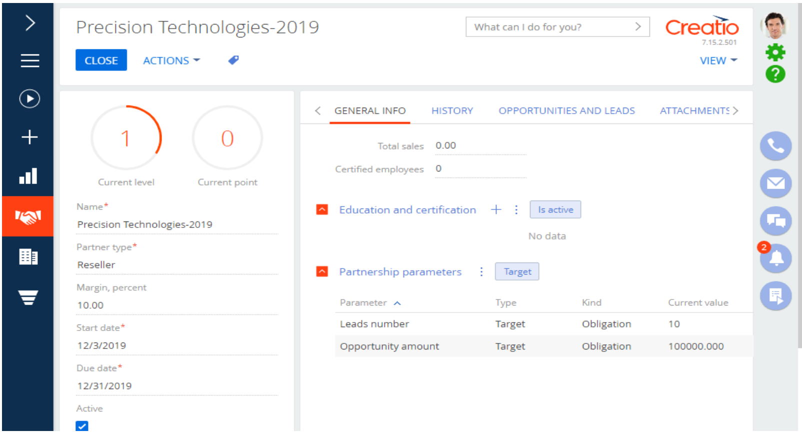
You can manage partner performance and set up the cooperation conditions in the main Creatio application.

A partner program is a representation of the current status and conditions of cooperation between your company and your partner organization. The partner programs are configured in the main application. Partner portal users can only access the profile of their own organization. The partner program access on the portal is read-only. The [Partner program] section is available for access by your partners and their employees. This section contains all information relevant to your partners and their work (Fig. 2):

- Current partner tier.
- Partner program conditions for the current tier:

- partner reward, such as a percentage of the profits of the partner (profit margin)
- performance indicators required for a level-up.
- Partner training sessions and certifications.
- Partner lead and opportunity analytics.

**Fig. 2** A partner program page on the portal.




## NOTE

You can only bind a single partner program to each partner.

When working on the partner portal, your partners can register new leads and opportunities in the corresponding portal sections. A partner program page displays lead and opportunity details by default. You can also find them on the partnership page in the main application. These data are used to keep track of how the partnership conditions are fulfilled and how higher partnership tiers are achieved. You can set up partner sales analytics in the dashboards on the portal main page. More information about setting up the portal main page is available in the "Set up the portal main page" article.

## Steps to take to start working with your partners on the portal

To start working with your partners, you need to take a few preparatory steps.

One-time steps:

- Develop partner program parameters.
- Populate the Creatio lookups with these parameters.

Steps for each new partner:

- Add a partnership with the required parameters to the [Partnership] section in the main Creatio application.
- Create a partner account on the portal (a partner organization), set up access permissions for the partner users and send them portal invitations.
- Send a portal invitation to your partner.

More information about preparing a partner portal for work is available in the “Working with partner programs” article. In this article, you can also find examples of setting up cooperation conditions with the partner.

## SEE ALSO

- Working with partner programs
- Customer portal

# Getting started with Creatio portal

Creatio portal is available for both on-site and cloud and cloud deployment options. Portal is ready for use out of the box. We recommend that you have a look at what the default portal functions have to offer. Then, you can dive into the more advanced portal functionality

1. Set up sections available on the portal. You can add up to 3 custom sections on the portal. Please note that you can only add custom sections if you use the "customer portal" configuration. You can find more details about different portal editions and their features in the "Portal" article. Section adding guide is available in the "Set up portal sections" article.
2. Customize the portal. Personalize the portal to reflect your brand:
    - Upload your logo. The logo is displayed on the main page and the login page.
    - Provide customer support contact options.
    - Add graphs and other analytics to the portal main page.

    Learn more in the "Portal customization" article.
3. Set up roles and access permissions. You can group multiple portal users into "portal organizations", and assign administrators for these organizations from among portal users. Additionally, you can set up access permissions the data available on the portal. Learn more about access permissions on the portal in the "Access permissions on the portal" article.
4. Set up user authentication methods. There are multiple ways you can add new portal users to Creatio: manually, by importing from Excel, by synchronizing with LDAP, via SSO (Single-Sign-On), via an invitation email, by setting up an independent authentication method. Learn more about adding portal users and the needed setup in the "Users and permissions on the portal" article.
5. Setting up partner programs You can create partner programs and display partner metrics using the "Partner portal" configuration. You can also process leads and opportunities in collaboration with your partners using out-of-the-box business processes. More information about the partner portal functionality and partner program setup is available in the "Working with partner programs" article.

## First login

Users can access the portal via an invitation email or by signing up independently (if you enable an independent authentication method). To access the portal, you need to have a portal user account. You can create a portal user account in several ways, see "Portal users" for details. If you need to create only one account, you can do it manually in the primary Creatio application.

To create a portal user in the Creatio application:

1. Click System Designer, -> [System users].
2. Click [Add] -> Portal user.
3. Select a contact, populate the login and password fields.
4. Save the changes.

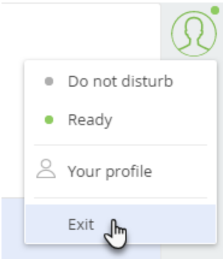
As a result, Creatio will create a new portal user, add them to the "All portal users" role and provide them with a portal license.

NOTE
The name of the portal license consists of the portal configuration and the main application deployment method, e.g., “Creatio self-service portal cloud” or “Creatio customer portal on-site”.

The main application and the portal have two different authorization pages. To log into the portal:

1. Log out of the main Creatio application (Fig. 1).

   **Fig. 1** Logging out of the main Creatio application

2. Add /login/SSPLogin.aspx to the application URL in your browser. Example of a link: mysite.creatio.com/login/SSPLogin.aspx. You will be redirected to the portal home page. Study the functionality and move on to the following setup steps.
3. Enter you login credentials and click [Login].

## SEE ALSO

- Users and permissions on the portal
- Portal customization
- Set up portal sections

# Users and permissions on the portal

Creatio enables you to manage portal users, group them, send email notifications and assign access permissions. In general, portal users are managed in the [System users] section where they are grouped in the "All portal users" organizational role.

You can manage portal users individually or use portal user groups, such as portal organizations.

A portal organization is a group of portal users who are connected to one account. Organizations enable you to manage your customers' employees. You can select portal administrators from users in your organization. Administrators can create and delete users, assign permissions and invite new users to the portal.

Creatio lets you configure which data and functions are available for portal users. You can assign portal user permissions in several ways:

- For the "All portal users" parent role. All portal users in this role will obtain the same access permissions.
- For each user separately.
- For a portal organization. Users will inherit the permissions of their organization.
- For user groups. You can create subordinate organizational roles in the "All portal users" role, and configure access permissions for them. To set up different access permissions within a single organization, add several functional roles and assign different access permissions.

Learn more about portal permissions in the "Access permissions on the portal" article.

Listed below are a few common business cases of portal setup.

## A portal for users without organizations

This is the simplest structure. Individual portal users are created in Creatio. Access permissions can be configured:

- For each user separately.
- For all users (by configuring permissions for a parent role).
- For user groups (if subordinate organizational roles are created).

Setup procedure:

1. Create users:
    - Add portal users. Read more >>>
    - Enable "Self-registration". Read more >>>
2. Sending email invitations. Read more >>>
3. Configure access permissions for portal users. Read more >>>

## A portal with organizations and the same access permissions for all users

In this structure, portal users are connected to an account, i.e., are grouped in an organization. You can configure access permissions for each organization individually. Users inherit the permissions form their organization, which means that you do not need to configure permissions for each user separately.

Setup steps:

1. Set up the organizational structure:
    - Create organizations and users in Creatio. Read more >>>
    - Assign portal administrators. Read more >>>

    - Create portal users on the portal (by the portal administrator). Read more >>>
2. Sending email invitations. Read more >>>
3. Configure access permissions for portal users.
    - Configure access permissions on the Creatio side. Read more >>>
    - Configure access permissions on the portal (by the portal administrator). Read more >>>

## A portal with organizations and the different access permissions for all users

You can create separate roles within a portal organization and configure their permissions. For example, create functional roles for the main and regional office managers and connect users in an organization with one of these functional roles. Users inherit the permissions from their functional role, which means that you do not need to configure permissions for each user separately.

Set up a portal with organizations, and different groups of permissions in a single organization:

1. Set up the organizational structure:
    - Create organizations and users in Creatio. Read more >>>
    - Assign portal administrators. Read more >>>
    - Create portal users on the portal (by the portal administrator). Read more >>>
2. Sending email invitations. Read more >>>
3. Configure access permissions for portal users.
    - Configure access permissions on the Creatio side. Read more >>>
    - Configure access permissions on the portal (by the portal administrator). Read more >>>

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# Portal users

Portal users are grouped in the "All portal users" organizational role.

You can create individual portal users or group them into an organization by connecting them to a specific account. Learn more in the "Add portal users" article.

> NOTE
> Users can register on the portal independently. For more information, please refer to the "User self-registration on the portal" article.

You can add users to the portal by sending them an invitation via email. Learn more about invitations in the "Sending a portal invitation" article.

If a portal user loses their password, it can be securely recovered. Learn more about password recovery in the "Password recovery setup" article.

> NOTE
> The portal enables you to create an organizational structure for various business cases. Learn more in the "Users and permissions on the portal" article.

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## Add portal users

You need to create a portal user account for each portal user. Each portal user account must be linked to a contact.

Company employees can manage your portal users through the primary application, while the portal administrators can do it through the portal. This article will cover managing portal users through the primary application.

> NOTE
> You can find instructions for the portal administrators in the "Portal administrators" article.

In the primary application, the portal users can be registered by system administrators or users who have permission to the "Manage portal users" (CanAdministratePortalUsers) system operation. The latter is a good option when company portal users are created by an employee who is not supposed to have access to other employee accounts.

You can add the following types of portal users:

- Individual portal users, without an organization. In this case, you would need to register each user. Read more >>>
- Portal organization users. You can add portal organization users "en mass". Read more >>>

> NOTE
> You can import portal users via LDAP integration or Excel import. For more information, see "LDAP integration and user authentication in Creatio" and "Import users from Excel" articles.

To restrict certain users from accessing the portal, deactivate them. For more information, see "Deactivate users".

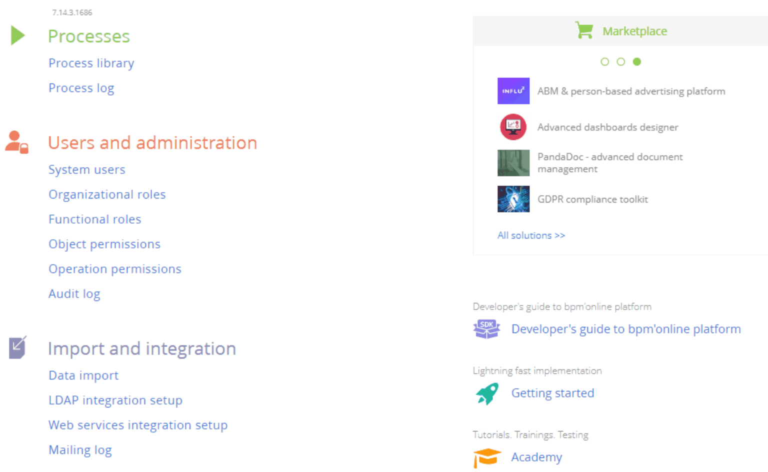
## Add individual portal users

You need administrator privileges to be able to add portal users. For more information, see "Add a system administrator user."

To add a portal user account:

1. Click -> [Organizational roles].
2. In the tree-like organizational structure to the left of the list, select the "All portal users" role. The area to the right of the roles tree will show the page of the selected role.
3. Go to [Users] tab —> [Users] detail —> + —> [Add new].
4. Populate the new user page (Fig. 2). For more on adding users, see "Add a regular user".

**Fig. 2** Creating a new user




### NOTE

If a contact record for the new portal user does not yet exist, you can add it during this step. Click in the [Contact] field, then click [New] in the lookup window that pops up. Populate the contact page that opens. After you save the contact page, you will return to the new user page, with the [Contact] field populated with the newly created contact

## Add users as part of a portal organization

To link portal users to an organization, add the organization record first.

All users in an organization automatically inherit any permissions assigned to that organization. This lets you set up access permissions only once – for an organization, and assign these permissions by including new users in the organization.

Depending on the user permissions, there are several ways you can create an organization and add users to it.

- Users with system administrator permissions can create organizations from the page of organizational roles. Read more >>>
- Users with permissions to the “Manage portal users” (CanAdministratePortalUsers) system operation can create organizations from the account pages. Read more >>>

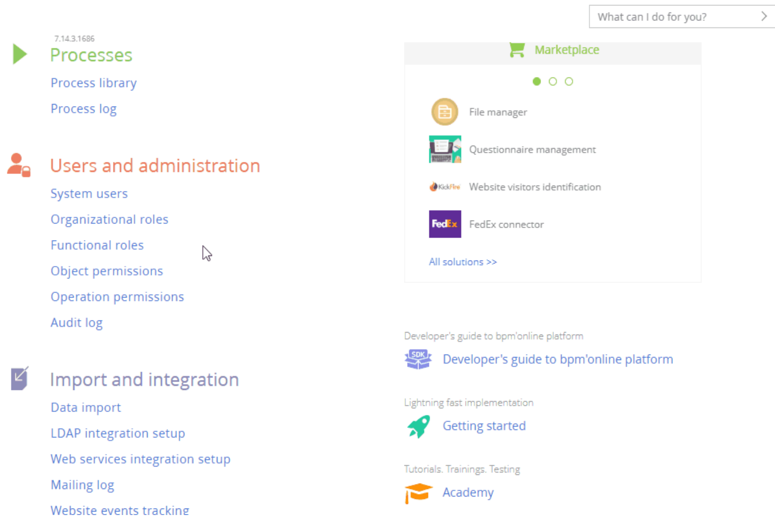
## Add users to a portal organization from the organizational role page

Adding organizations in this manner is available only for system administrators. For more information, see “Add a system administrator user.”

1. Click —> [Organizational roles] —> “All portal users”.
2. Go to the [Organizations] detail —> + —> select an account for the new organization in the [Account] field (Fig. 3). Use search string in the account lookup window to find the needed account by its name.

   If necessary, modify the organization’s name in the [Name] field.

   **Fig. 3** Adding a portal organization from the organizational role page




   NOTE

   If an account record for the new portal organization does not yet exist, you can add it during this step (when populating the [Account] field on the organization page).

3. Save the page. Go to the [Organizations] detail and click the needed organization. The organization page opens.
4. On the [Portal users] detail:
   - Click + and select [Add existing contacts] to add an existing contact. Select the contacts in the pop-up window (Fig. 4).

- Click + and select [Add new contacts] to add a new contact. Enter the email addresses of the new users, use spaces or commas to delimit the addresses. Creatio automatically validates any entered email address. Click [Create portal users].

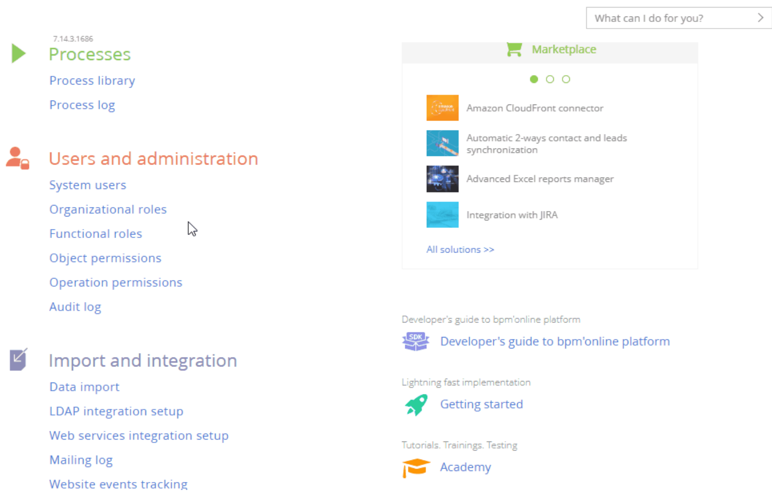
  Creatio will locate the contacts with matching email addresses or create a new contact for each address that does not match any existing contacts. For any new contacts, the [Full name] field will contain email address text, minus the "@" character and email domain name.

5. Creatio will prompt you to send email invitations to the new portal users. You can choose to send the invitations later by closing the prompt.

## NOTE

Learn more about setting up the invitation in the "Sending a portal invitation" article.

**Fig. 4** Adding users to a portal organization from the organizational role page




As a result, the users will be added to the organization and automatically inherit any permissions assigned to that organization. Learn more about access permissions in the "Access permissions on the portal" article.

To manage the portal users' parameters (login, password, roles, and licenses), double click the corresponding string on the [Portal users] detail.

Managing the portal users' parameters requires permission to the [Manage portal users] (CanAdministratePortalUsers) system operation.

Learn more about using system operations in the "System operation permissions" article.

## Add users to a portal organization from the account page

Users with permission to the "Manage portal users" (CanAdministratePortalUsers) system operation can add a portal organization from the corresponding account page. Learn more about using system operations in the "System operation permissions" article.

Use this option if you do not have permission to access the [System users] section.

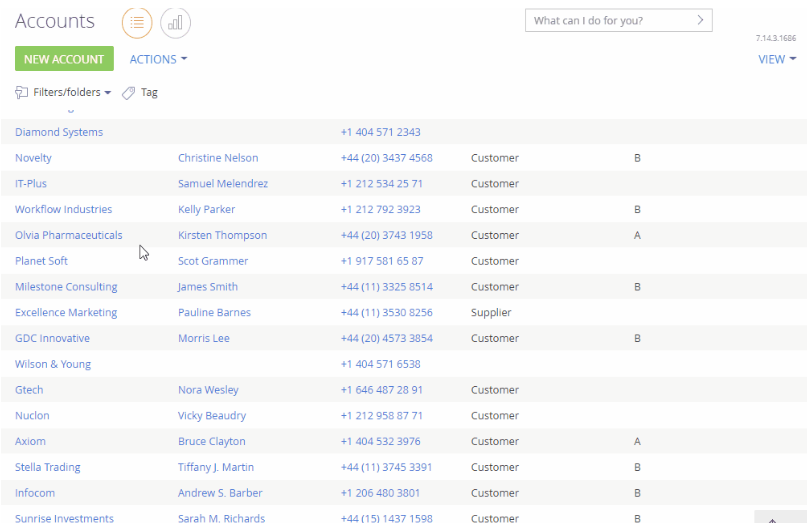
1. Open the account page —> click the [Contacts and structure] tab —> go to the [Portal users] detail.
2. Click [Create organization]. The button is available only of the account is not already linked to a portal organization.

   NOTE

   If you try to add portal users by clicking + before you create a portal organization, you will be prompted to create a portal organization.

3. Select “All portal users” in the [Parent role] field (Fig. 5).

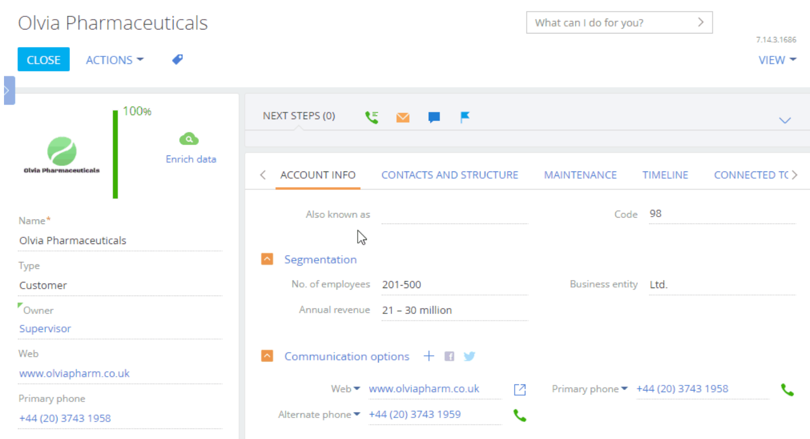
   **Fig. 5** Adding a portal organization from the account page




4. Save the changes. As a result, a new organization will be added and become available on the page of the “All portal users” role.

   - If the contact record already exists, go to the [Portal users] detail —> + —> [Add existing contacts] to add a new contact. Select the contacts in the pop-up window (Fig. 6).

**Fig. 6** Adding users to a portal organization from the [Portal users] detail




- If the contact record does not exist, go to the [Portal users] detail —> + —> [Add new contacts]. Enter portal user email addresses and click [Add users].

5. Creatio will prompt you to send email invitations to the new portal users. You can choose to send the invitations later by closing the prompt.

   NOTE
   You can also add portal users to an organization from the [Contacts] detail. Select several contacts in the detail's list, click ⋮ and select [Add portal users].

As a result, the users will be added to the organization and automatically inherit any permissions assigned to that organization. Learn more about access permissions in the "Access permissions on the portal" article.

To manage the portal users' parameters (login, password, roles, and licenses), double click the corresponding string on the [Portal users] detail.

NOTE
Portal administrators can also add new portal users within their organization. More information is available in a separate article.

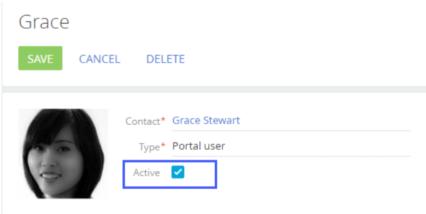
## Deactivate users

To restrict a portal user from accessing the portal, deactivate the corresponding portal user account.

### Deactivate a portal user from the user page

1. Click —> [System users]. Open the user page.
2. Clear the [Active] checkbox an save the changes (Fig. 7).

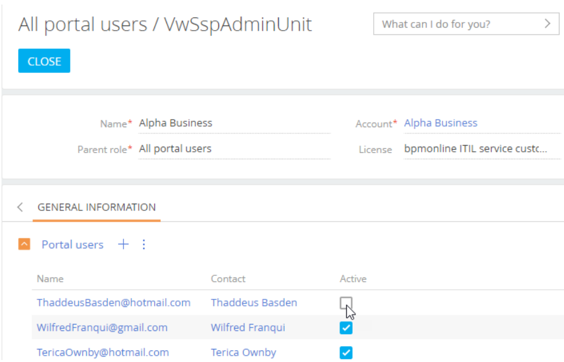
**Fig. 7** Add individual portal users




Deactivate a portal user from the organization page

1. Click —> [Organizational roles] —> “All portal users”.
2. Go to the [Organizations] detail and click the needed organization. Locate the user to deactivate.
3. Clear the [Active] checkbox an save the changes (Fig. 8).

**Fig. 8** Deactivating a portal user in an organization




As a result, the user will be suspended and will not be able to access the portal. You can reactivate a user at any time.

## SEE ALSO

- Sending a portal invitation
- Password recovery setup

# Sending a portal invitation

To enable a new user to log in to the portal, you will need to send them an email invitation. The invitations are sent to the email specified on the contact page of the portal user. You can customize the invitation by modifying the corresponding email template.

You can send invitations in the following cases:

- When creating portal users.

- At any moment after the portal users have been created.

  NOTE

  Portal users who are administrators of portal organizations can also send invitations. More information is available in the "Portal administrators" article.

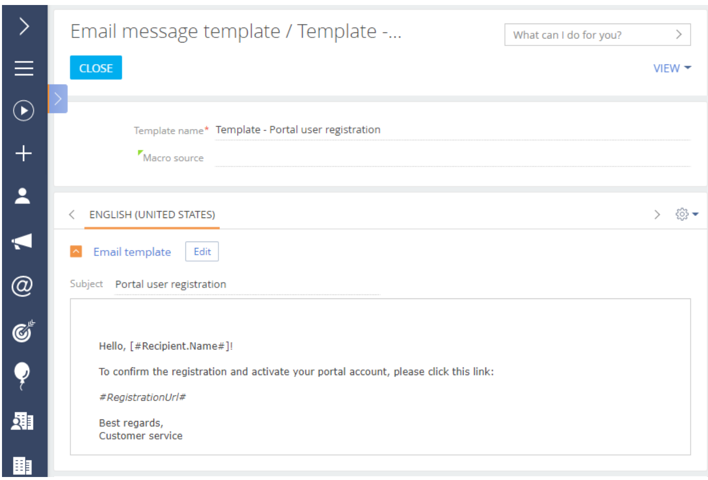
  ATTENTION

  Sending invitations requires mailbox integration. Learn more in the "Working with emails" article.

## Set up portal invitations

1. Set up a mailbox for sending portal user invitations and password recovery emails. Specify the mailbox address in the "SSP registration mail box" ("SSPRegistrationMailbox") system setting. More information is available in the "User self-registration on the portal" article.
2. If necessary, set up preferred languages for the portal user contacts and localized templates. By default, the users will receive notifications in English. If the [Culture] field on the user page contains language other than English, and notification templates are available in that language, the user will receive localized notifications. Read more in the "User profile article.
3. Customize the email text. To do this, edit the invitation email template: open  —> [Lookups] —> [Email templates] —> [Open content] —> "Template - Portal user registration" (Fig. 9). Edit this template to customize the email text and layout, add localized versions.

**Fig. 9** Email template for notification about portal user registration




## Send portal invitations

The following options are available for sending invitations:

- Send the invitation right after adding a new portal user by clicking [Send invitation]. Learn more in the "Add portal users" article.

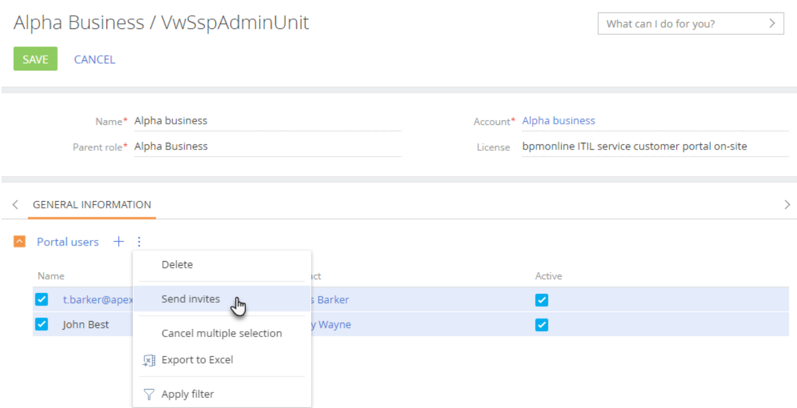
- Send an invitation to specific users at any time. To do this:
    - Select the needed users in the list of the [Portal users] detail.
    - Click ⋮ —> [Send invites] (Fig. 10).

A portal administrator can send an invitation in a similar way. More information is available in the "Portal administrators" article.

## NOTE

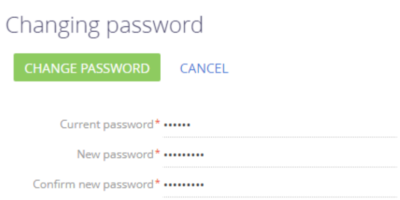
If a user clicks the portal link in the invitation email and does not specify any password, the password will be generated automatically. The link in the invitation email works only once. A portal administrator should send another portal invite to any users who do not specify their password on the first login.

**Fig. 10** Sending portal invites




After clicking the link in the portal invitation email, the user is redirected to the page where they need to create their password (Fig. 11).

**Fig. 11** Creating a password on the first login




## NOTE

You can add a password recovery link on the portal login page. Learn more in the "Password recovery setup" article.

## SEE ALSO

- Add portal users

- User self-registration on the portal
- Password recovery setup

## User self-registration on the portal

Enabling the self-registration for portal users helps save time and automates several functions of the portal administrator. The setup procedure consists of several required and optional steps.

Required:

- Make sure that there is a Creatio portal system user with the least permissions. Read more >>>
- Set up portal user licensing at self-registration. Read more >>>
- Set up sending notifications about portal user registration and password recovery. Read more >>>

Optional:

Edit the registration and password recovery email templates. Read more >>>

### Portal system user

A separate Creatio user account (one with minimal access permissions) is required for the correct self-registration of portal users, password recovery and receiving case feedback. By default, it is the SysPortalConnection user. Please make sure that you do not delete this user, and do not modify this user's access permissions and licensing. Otherwise, user self-registration on the portal might be unavailable.

If you face any issues when performing self-registration, check the settings of the system user.

1. Click -> [System users], locate a portal system user record.
2. Open the system user page SysPortalConnection -> find a portal license in the [Licenses] tab.
3. Make sure the system user is connected to an existing contact (the [Contact] field).

NOTE

The name of the portal license consists of the portal configuration and the main application deployment method, e.g., "Creatio self-service portal cloud" or "Creatio customer portal on-site".

To change the portal user account:

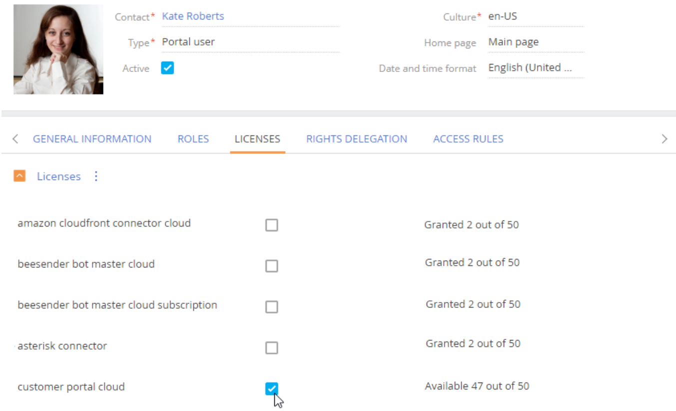
1. Add a user in the [Users and roles management] section. Click -> [System users] -> [New] ->[Portal user]. Please do not specify the "Supervisor" or an employee user who works in the main Creatio application.
2. Assign a portal license on the [Licenses] tab.
3. Configure minimal access permissions for the new user in the [Object permissions] section. See the "Object permissions" article for more information.
4. Specify the new user in the application settings:
   - On-site:: specify the user in the web.config file. Read more in the "Set up automatic user licensing of portal users during registration" article.
   - Cloud: contact Creatio support and provide the system user credentials.

## Set up automatic user licensing of portal users during registration

For the portal users to automatically obtain a portal license during registration:

1. Click System Designer, -> [System users].
2. Open the portal system user page. By default, the portal system user is SysPortalConnection.
3. On the [Licenses] tab, select a checkbox next to the portal license (Fig. 12).

**Fig. 12** Assigning a portal license to the system user




4. In the license manager, verify that there are unassigned portal licenses to provide for the self-registered portal users. Licenses will be assigned automatically. Learn more about licensing in the "License distribution" article.

   NOTE

   The name of the portal license consists of the portal configuration and the main application deployment method, e.g., "Creatio self-service portal cloud" or "Creatio customer portal on-site".

## Additional on-site settings

For applications deployed on-site, in addition to the steps above, you need to edit the Web.config file located in the root directory of the Creatio application.

1. In the SspUserRegistrationLicPackage parameter, specify the product name, where the licenses should be applied. For example:

   [illegible]

2. Make sure that the UserManagementSauName and UserManagementSauPassword parameters contain the system user login and password. New portal users will receive the permissions of the user specified in the configuration file.

## Set up notifications for portal users

To send invitations or confirmation emails to portal users, configure a mailbox for portal notifications. To do this, you need to synchronize a mailbox with Creatio.

> NOTE
> Learn more about mailbox synchronization in the "Configuring email accounts in Creatio".

To set up notifications for portal users

1. Click —> [System settings].
2. Open the "SSP registration mail box" (code "SSPRegistrationMailbox") system setting.
3. In the [Default value] field, specify a mailbox that will be used to send notifications to the portal users.

## Set up email templates

You can customize the templates for email notifications that the portal users receive after registration or when recovering their passwords. Use the [Email templates] lookup to customize existing email templates or create new templates. By default, Creatio uses the following templates for email notifications:

- "SSP invite template (US)" - an invitation to the portal.
- "Template - Portal user registration" - portal user registration confirmation.
- "Link for password recovery" - password recovery link.

> NOTE
> Learn more about email templates in the "Configuring email templates" article.

To determine which template will be sent to a user, Creatio uses the following system settings:

- "SSP invite template" (PortalInvitationEmailTemplate);
- "Confirmation email template for portal user registration" (PortalRegistrationEmailTemplate);
- "Password reset email template for portal user" (PortalRecoveryPasswordEmailTemplate).

To locate these system settings, click -> System Designer -> [System settings].

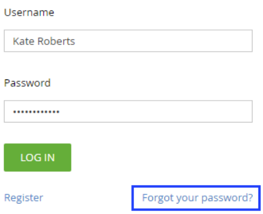
### SEE ALSO

- Add portal users
- Access permissions on the portal

## Password recovery setup

If a user is unable to log in to the portal, they can request the administrator to send another invite or use the password recovery function (Fig. 13).

**Fig. 13** Password recovery




After clicking [Forgot password] on the login page, the user will receive an email with a password recovery link.

To customize the password recovery email template:

1. Click —> [Lookups] —> [Email templates] —> "Link for password recovery".
2. Edit the template.

   The "Link for password recovery" template must contain the #RecoveryLinkUrl# macro, which will be replaced with the corresponding link in an email that the portal user will see.

   NOTE

   The email template for password recovery notifications is determined by the following system setting: "Password reset email template for portal user". Make sure that an existing valid template with the #RecoveryLinkUrl# macro is specified in this system setting.

## SEE ALSO

- Sending a portal invitation
- User self-registration on the portal



ACCELERATE

# Access permissions on the portal

Since portal functionality lets external users access Creatio data, managing access permissions for portal users becomes paramount. You can choose which of your business data is available on the portal, and make sure that any sensitive and confidential information is safe out of external users' reach.

Access permissions on the portal are designed according to the "least access" principle. This means that the portal users are generally prohibited to perform any action that they do not have explicit permission to.

## Default portal user permissions

By default, all portal users have the following access permissions:

- Permission to read articles in the [Portal Knowledge base] section. When regular Creatio users add new knowledgebase articles, the portal users are automatically granted permission to read these articles.
- Permission to view the portal main page.
- Permission to change the password on the user profile page.
- Permission to access the folder area in the portal sections,
- Permission to post, edit and delete comments in the feed. Users can also "like" other users' comments.
- For the Creatio service products, the users of the self-service portal also have permission to create records in the [Portal Cases] section. The users can only see their own records.

Just like with regular users, you can manage two types of access permissions: object permissions and system operation permissions.

- Object permissions let you manage access to sections, details, and lookups, as well as their separate records and columns. Read more >>>
- System operation permissions let you manage portal user access to specific functions, such as Excel export. Read more >>>

## Managing access permissions for portal users

In general, managing access permissions for the portal users is the same as managing access of regular users, with the same array of administrative tools and mechanics. Read more in the "User profile article.

The specifics are as follows:

- Portal users make a separate type of Creatio user accounts that belong to the "All portal users" organizational role.
- In addition to the regular object permissions, the data available for portal users is limited by the [List of objects available for portal users] lookup. Only the objects included in the lookup are accessible via the portal UI.

Note that the list of sections available for portal users also depends on the portal configuration. For example, the [Portal cases] section is not available in the "Customer portal" configuration. See the "Portal" article for more information on the portal configurations.

Whenever a portal user attempts to access specific data, Creatio checks permissions in the following order:

1. Availability on the portal.

Is the object that contains the requested data included in the "List of objects available for portal users" lookup? If it's not - the user will not be able to access the data, regardless of other permissions.

2. Object operation access.

   Does the user have permission to create/read/update/delete data in the object? If not, the user will not be able to perform it (e.g. read or edit data), regardless of other permissions.

3. Record access.

   Does the user have permission to access the object record that contains the needed data? If certain records are restricted, the user will not be able to access them (e.g. read or edit particular support cases, knowledge base articles, etc.), regardless of other permissions.

4. Column access.

   Does the user have permission to access the column that contains the needed data? If certain columns are restricted, the user will not be able to access the data stored in these columns (e.g. read or edit case assignee, knowledge base author, etc.), regardless of other permissions.

Each step represents a separate object permission level that you can set up.

ATTENTION

The "All portal users" role has a set of default permissions that enable the users to work with the base portal sections. If you add new sections and other functions on the portal, be sure to update the portal user access permissions.

NOTE

If you do not add a section of the main application to the workplace of a portal user, they will not be able to open the section or its record page by clicking a direct link.

## Object permission levels

Object operation permissions enable you to grant access to create/read/update/delete operations for all data in an object. For example, you can enable creating new articles in the [Knowledge base] section for the portal users by configuring the corresponding operation permissions for the "Knowledge base" object. See "Managing object operation permissions" for detailed instructions.

Record permissions enable configuring portal user access to separate records: separate support cases, knowledgebase articles, requests, etc. For example, portal users should be able to see their own cases, as well as cases created by their colleagues within the same organization.

Note that unless you grant record permissions specifically, portal users will be able to access only the records that they created. You can set access to records in several ways:

- Set up default permissions that apply to each new record, based on its author.
- Share the record with the portal users through "Actions" on a record page.
- Use business processes to allocate permissions.

Column permissions manage access to specific fields of a record (e.g., the "Satisfaction level" field in a case record). Configuring column permissions will determine:

- whether a corresponding field will be visible on the record page;
- whether the record will be available for displaying in the section grid.

See "Managing column permissions" for detailed instructions.

You can grant these permissions to each portal user separately (which would not be very efficient) or to a portal user role, such as the "All portal users" role.

## Organizational structure and portal organizations

Similar to regular Creatio users, you can group portal users by assigning them various organizational and functional roles. If you assign permissions to a role, they will apply to all users of that role.

By default, all portal users in Creatio belong to a single "All portal users" role. The access permissions that you assign to this role will apply to all portal users.

You can group and segment your portal users by adding subordinate roles to the "All portal users" role. These roles will automatically obtain all access permissions from their parent role. You can also grant additional permissions to each of the subordinate roles. For example, portal users from different locations may have different access permissions.

Portal organizations are special types of portal user roles. They are used for managing employees of your customers. You can link such portal organizations to existing accounts in Creatio. Learn more about setting up access permissions for portal organizations in the "Users and permissions on the portal" article.

### CONTENTS



### SEE ALSO

- Managing organizational roles
- Managing functional roles
- Users and permissions
- Object permissions
- Portal configurations
- Managing object operation permissions
- Managing record permissions
- Managing column permissions
- Portal users

# Managing portal user roles

Use the organizational structure roles to manage portal user permissions and quickly grant access to objects, records or columns to multiple users as per your business needs.

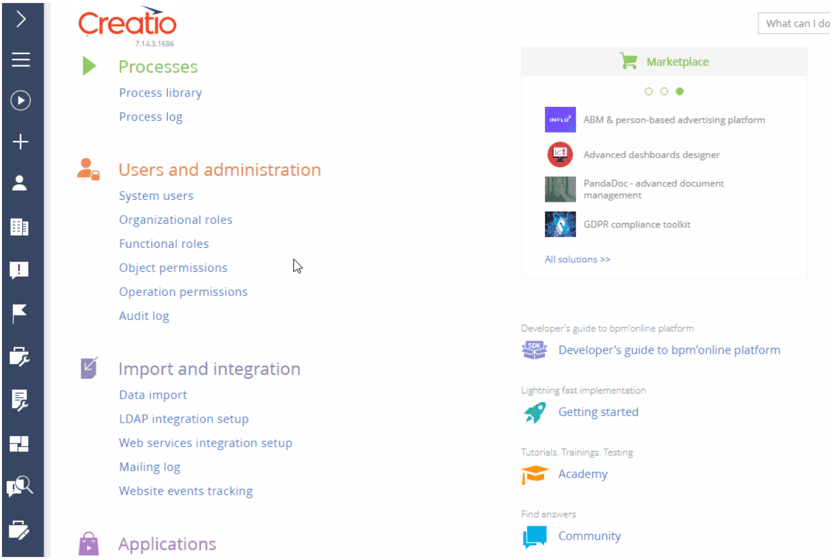
## Add portal user roles

You can add organizational roles for portal users in the same way as for regular users. Learn more about how to add roles to the organizational structure for Creatio users in the "Managing organizational roles" article.

> **NOTE**
> Only system administrator users can access organizational and functional role sections in Creatio. To enable a regular user to create and configure portal organizations as well as manage portal users, make sure you grant them permissions for the "Manage portal users" (CanAdministratePortalUsers) system operation. Read more >>>

For example, you can create a "London" organizational role to manage permissions separately for London-based portal users (Fig. 14). Note that portal user roles must be subordinate to the "All portal users" parent role.

**Fig. 14** Adding a portal user role



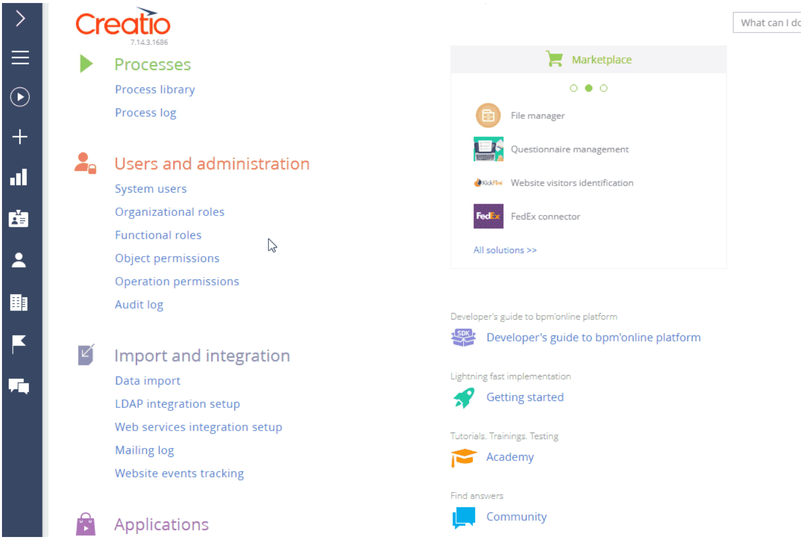

As a result, the users of the "London" organizational role will inherit the permissions configured for the "All portal users" role. You will be able to assign additional permissions, which will be specific to all portal users with the "London" role.

## Assign a role for a portal user

You can assign portal users to organizational roles similarly to assigning regular users corresponding roles. Learn more about how to add roles to the organizational structure for Creatio users in the "Assign a user role" article.

For example, you can assign portal users to the "Toronto" organizational role (Fig. 15). Note that you can only assign portal users to the roles that are subordinate to the "All portal users" role.

**Fig. 15** Assigning organizational roles for portal users




As a result, the user of the "Toronto" organizational role will inherit the permissions configured for the "Toronto" role, as well as any permissions configured for its parent "All portal users" role.

SEE ALSO

- Add portal users
- Managing organizational roles
- Managing functional roles
- Assign a user role
- Managing access permissions for portal users

## Setting up access permissions for portal users

Although you can grant permissions to specific portal users, the most efficient way would be to assign permissions to portal user roles.

- Assign common permissions to the "All portal users" role.
- Add subordinate organizational roles to the "All portal users" role to differentiate permissions between different groups of portal users.
- Link roles to customer accounts – to manage employees of your customers.

Grant permissions to the portal section data by assigning object permissions. See the "Object permissions" article for more information. You can manage portal user access on three levels:

- Object operation permissions – ability to view, add, edit and delete data in an object.
- Record permissions – ability to view, edit, and delete specific records in objects.
- Column permissions – ability to view, edit and delete data in specific columns.

ATTENTION

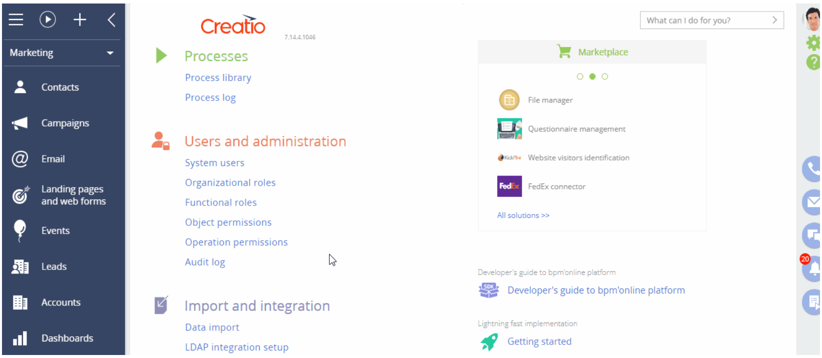
Before you start setting up access permissions for portal users, make sure that the corresponding objects are listed in the "List of objects available for portal users" lookup. If they are not – none of the object data will be available for the portal users.

## Set up object operation permissions on the portal

You can manage general access permissions to a section, detail or lookup on the portal by setting up object operation permissions for the portal user roles. Setting up permissions for portal users is similar to that of regular users. Read more in the "Managing column permissions" article.

For example, you can set different permissions for working with the [Knowledge base article] section for portal users from Boston and Toronto (Fig. 16).

**Fig. 16** Managing object operation permissions on the portal




As a result, portal users of the "Boston" role will be able to create new articles in the [Knowledge base] section, view and edit existing articles, but will not be able to delete them. Portal users with the "Toronto" role will only be able to view the knowledge base articles, without permission to modify or delete them.

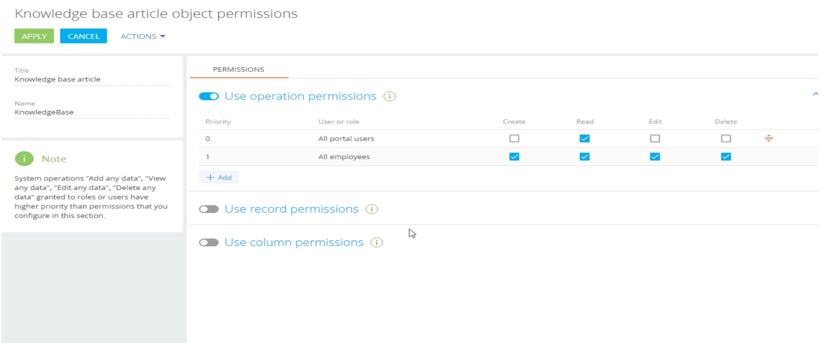
## Set up record permissions on the portal

You can manage portal use access to specific records in the portal sections, details, and lookups. If you enable record permissions in an object, all object records will become unavailable for portal users, unless specific permissions exist for each specific record.

Creatio can automatically grant permissions to each record in an object, based on the record author. Setting up permissions for portal users is similar to that of regular users. Read more in the "Managing column permissions" article.

For example, you assign permissions to knowledgebase articles created by portal users in Boston (Fig. 17).

**Fig. 17** Managing record permissions on the portal




As a result, the users in Toronto will be able to see the knowledge base articles created by portal users from Boston.

ATTENTION

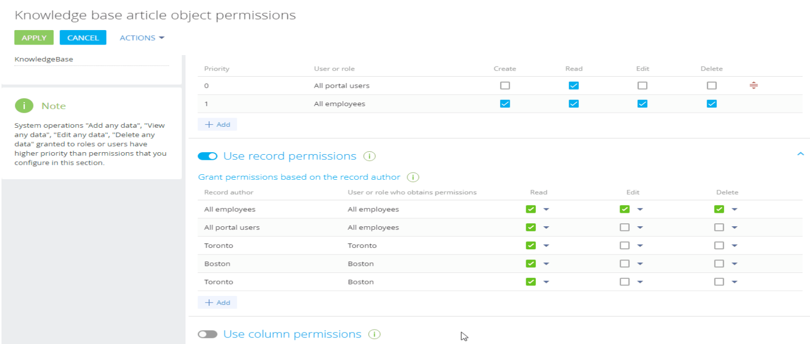
Before you set up record permissions in an object, make sure that portal users have access to corresponding object operations.

## Set up column permissions on the portal

You can manage portal user access to specific columns in sections, details, and lookups by setting up column permissions for the needed portal user or role. Setting up permissions for portal users is similar to that of regular users. Read more in the "Managing column permissions" article.

For example, you can hide the [Modified on] column to deny portal users and roles permission to view the date when knowledgebase articles were last updated (Fig. 18).

**Fig. 18** Managing column permissions on the portal




As a result, the users of "Toronto" will not be able to see the "Modified on" column on the knowledgebase article pages.

ATTENTION

Before you set up column permissions in an object, make sure that portal users have access to corresponding object operations and records.

## SEE ALSO

- Managing object operation permissions
- Managing record permissions
- Managing column permissions

# Portal administrators

You can grant portal administrator privileges to portal users in an organization.

These portal administrators will have several additional permissions within their organization:

- Managing the organization profile. The organization profile page offers the organization information (name and phone number), as well as the list of portal users.

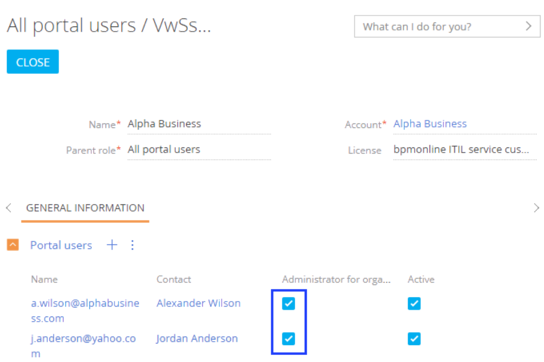
  NOTE
  System administrators can manage the content of the organization profile page. Learn more in the "Set up the profile page" article.

- Adding users. Read more >>>
- Sending invites. Read more >>>
- Set up permissions. Read more >>>
- Viewing and editing service information. Read more >>>

To promote a portal user to the portal administrator:

1. Click —> [Organizational roles] —> "All portal users" in the primary application.
2. Go to the [Organizations] detail and click the needed organization. The portal organization page opens.
3. Select the [Administrator for organization on the portal] checkbox for the users who must be made administrators (Fig. 19).

**Fig. 19** Promoting portal users to portal administrators




Portal administrators can promote other users as well.

NOTE
If you do not appoint a portal administrator for an organization, regular system administrators will need to add, invite and deactivate portal users of that organization. For more information, see "Add a system administrator user".

## Add portal users

Portal administrators can invite new users to the portal. Potential users receive an email invitation with a one-time link that they can use to access the portal for the first time and set up their password.

**NOTE**

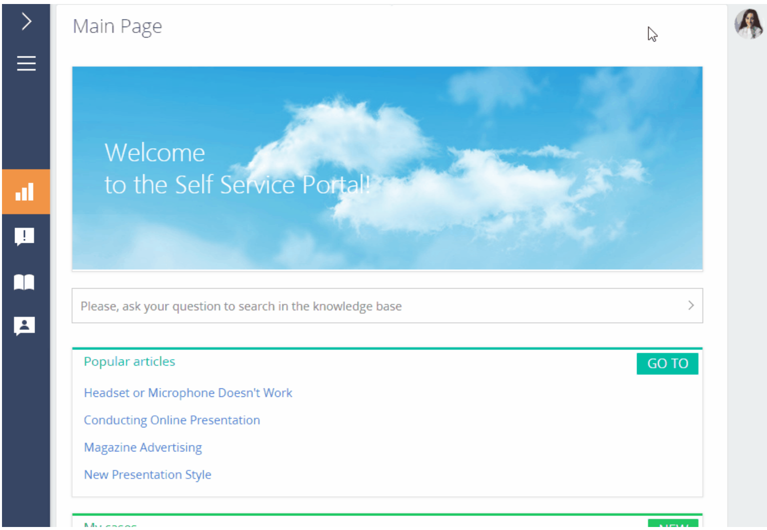
You need to set up email integration, as well as specify a valid mailbox in the "SSP registration mailbox" (SSPRegistrationMailbox) system setting. Learn more in the "Working with emails" and "User self-registration on the portal" articles.

To add new portal users:

1. Click your profile picture in the top right —> [Organization profile].
2. Go to the [Portal users] detail —> click + —> enter the email addresses of the users to invite. Creatio automatically validates any entered email address. Click [Create portal users] (Fig. 20).

   If Creatio matches the entered email addresses to any existing contacts, it will add portal users linked to those contacts. If no matching contacts are found, they will be created automatically, based on the email addresses. For any new contacts, the [Full name] field will contain email address text, minus the "@" character and email domain name.

   **Fig. 20** Adding portal users by a portal administrator

3. Creatio will prompt you to send email invitations to the new portal users. You can choose to send the invitations later by closing the prompt.

As a result, new portal users will be added on the portal. To log in to the portal for the first time, the users will need to click the link in the invitation emails. Once on the portal, each user will be able to set a password.

## Send invites to portal users

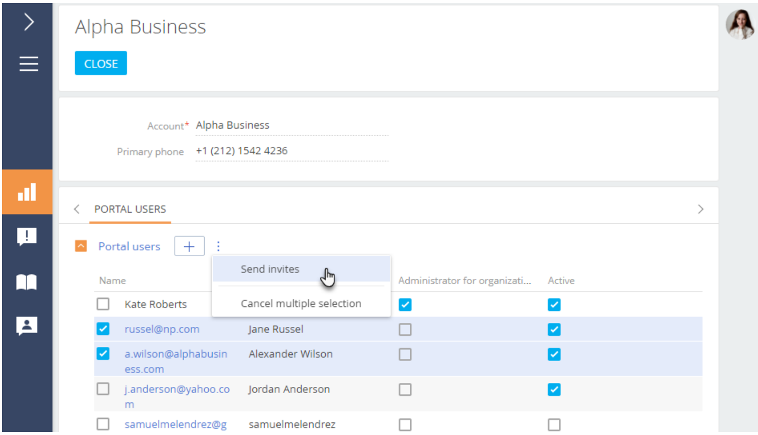
Administrators can send invites to portal users of their organization.

> **NOTE**
> More information is available in the "Sending a portal invitation" article.

If a new portal user forgets to set their password after the first login, the administrator will need to re-send the invite. To do this:

1. Select the needed users in the list of the [Portal users] detail.
2. Click ⋮ —> [Send invites] (Fig. 21).

**Fig. 21** Sending a portal invitation



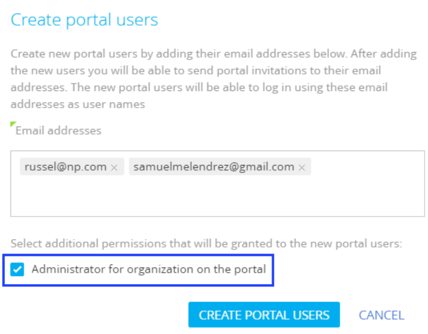

## Set up permissions

Portal administrators can grant permissions to other portal users within the same organization. Users can be assigned any of the organizational roles that are subordinate to the corresponding portal organization. To do this:

1. Click your profile picture in the top right —> [Organization profile].
2. Go to the [Portal users] detail —> click + —> enter the email addresses of the users to invite.
3. In the user registration window, select the roles to assign to the invited users (Fig. 22). Click [Create portal users].

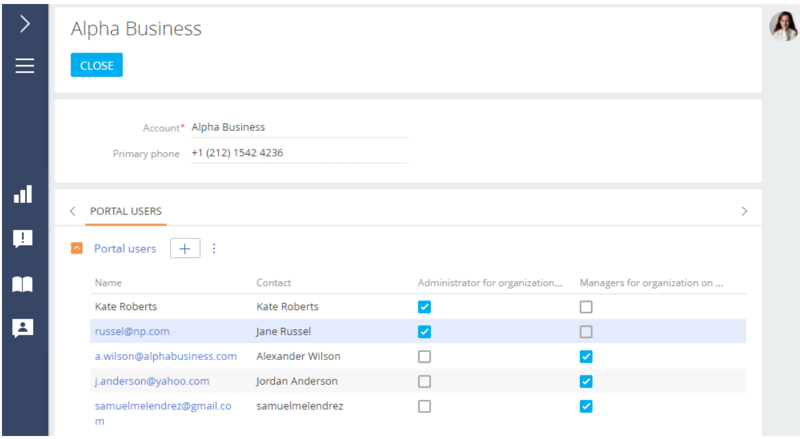
   In this example, the users will obtain all permissions of the portal administrator, as well as permissions assigned to the "Portal managers" role.

**Fig. 22** Assigning permissions to the new portal users




Portal administrators can assign roles to existing users. The list of available roles is shown on the [Portal users] detail (Fig. 23).

**Fig. 23** Portal user roles

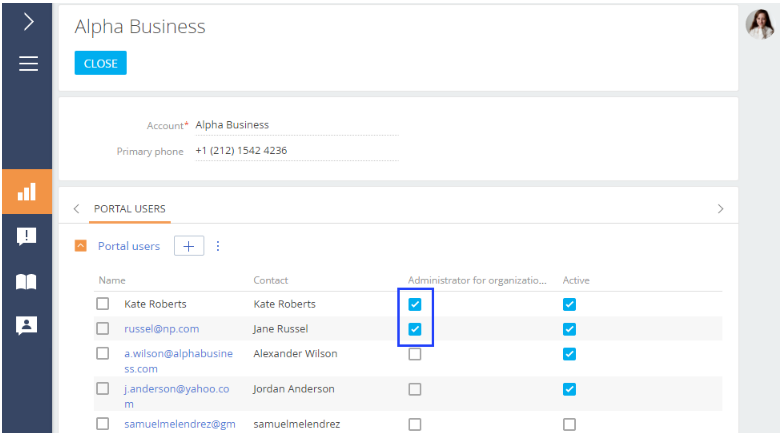



## Promote a user to a portal administrator

You can grant portal administrator privileges to any user within a portal organization. To do this:

1. Click your profile picture in the top right —> [Organization profile].
2. Go to the [Portal users] detail, select [Administrator for organization on the portal] checkbox (Fig. 24).

**Fig. 24** Assigning portal administrator privileges



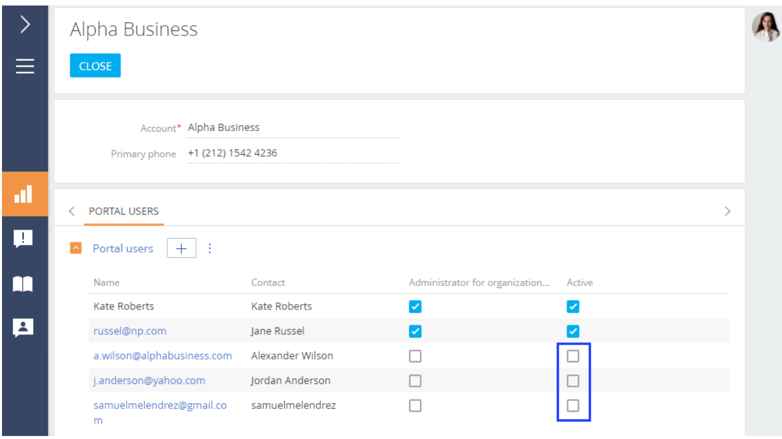

## Deactivate users

To restrict a portal user from accessing the portal, deactivate the corresponding portal user account.

To deactivate a portal user.

1. Click your profile picture in the top right —> [Organization profile].
2. Go to the [Portal users] detail —> clear the [Active] checkbox next to the users who must be deactivated (Fig. 25).

**Fig. 25** Deactivating portal users

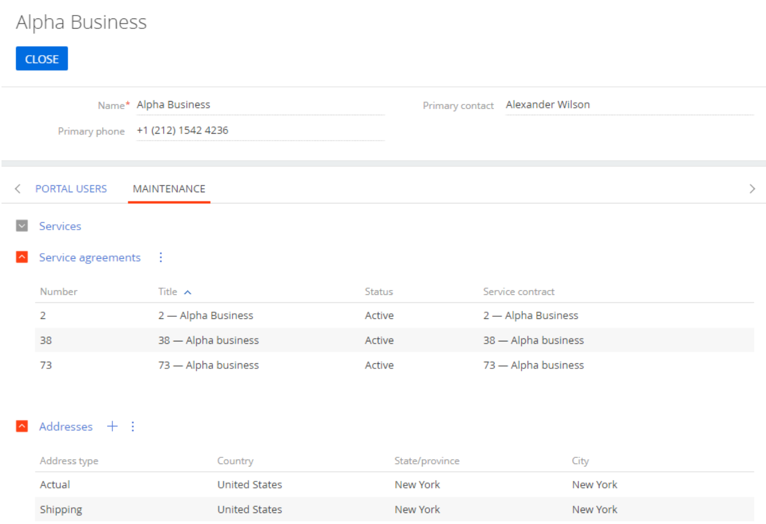



As a result, the user will be suspended and will not be able to access the portal. You can reactivate a user at any time.

## Viewing and editing service information.

The portal in the Service Creatio, enterprise edition enables administrators to view all service agreements that belong to their company. Click the profile picture in the top right —> [Organization profile] —> [Maintenance] (Fig. 26).

**Fig. 26** Company's service agreements




Portal administrators can add, modify and delete their company's addresses (actual, legal and shipping). All changes must be saved.

### SEE ALSO

- Portal users

# Portal customization

Personalize the portal to reflect your brand:

- Set up the portal login page. Read more >>>
- Set up the portal main page. Change the banner, add charts and custom widgets. Read more >>>

## CONTENTS



## SEE ALSO

- Users and permissions on the portal
- Set up portal sections

# Set up the portal login page

The login page allows portal users to authenticate on the portal by entering their login credentials or by authenticating via an alternative method. The main application and the portal have separate login pages. These pages share several settings.

For example, the login page URL for an application “https://mysite.creatio.com” will be as follows:

- Creatio application: https://mysite.creatio.com/Login/NuiLogin.aspx
- Portal: https://mysite.creatio.com/login/SSPLogin.aspx.

By default, https://mysite.creatio.com is the main application login page. However, you can change it to be the portal login page. Read more >>>

We recommend adding the following assets to the portal login page:

- Corporate logo – you can add different logo images for the main application and portal login pages. Read more >>>
- Support phone numbers and links to any additional resources, which are displayed both on the main application and portal login pages. Read more >>>

CONTENTS



## Change the default login page

If you use the portal to actively communicate with customers, you can set the portal login page as the default one. This is most useful if self-registration is the primary method of user authentication on your portal.

### Cloud settings

If you use a cloud-based version of Creatio, contact our support and have our team configure Single Sign-On on your site via a remote connection.

### On-site settings

If you use an on-site version of Creatio, perform the following settings in the Creatio configuration files:

1. Modify the Web.config file located in the Creatio root folder.
2. Change the value from NuiLogin.aspx to SSPLogin.aspx. For example:

   [illegible]

3. Save the changes.

## Set up the logo

You can replace the default image on the login page with your logo. To do this:

1. Click —> [System settings].
2. Open the "SSP Logo" system setting.
3. Delete the old logo by clicking the [Clear value] button.
4. Click [Select file] and choose the logo. Recommended image size: 37x274 pixels. If you upload a larger image, it will be scaled down to match the required dimensions. The recommended image format is PNG. Other standard image formats supported by your browser are also available.
5. Save the changes.

NOTE

The logo on the login page is a cached item, so the user needs to clear the browser cache and refresh the page to see the changes.

## Set up contact options and links

You can display contact options on the login page, e.g., sales department or customer support contacts, as well as any additional resources. These data will be displayed both on the main application and on the portal login pages.

### Add contact options

To add contact options to the login page:

1. Click -> [Edit].
2. Open the [Communication Options for Login Page] lookup.
3. In the opened window, click the [New] button.
4. Specify the name of the contact option, e.g., "Support" and add a phone number.
5. Click [OK].
6. If you need to add multiple contact options, repeat steps 3-5 for each contact option.

### Add links

To links to the login page:

1. Click -> [Edit].
2. Open the [Useful links for login page] lookup.
3. In the opened window, click [New].
4. Specify the name of the link, e.g., "Official website" and add a URL.
5. Click [OK].
6. If you need to add multiple links, repeat steps 3-5 for each link.

If user self-registration is not required, you can remove the "Register" button on the portal login page:

- For applications deployed on-site, change the ShowPortalSelfRegistrationLink parameter in the Web.config file to:

- For applications deployed in the cloud, please contact Creatio support.

## SEE ALSO

- Set up the portal main page
- Logo customization

# Set up the portal main page

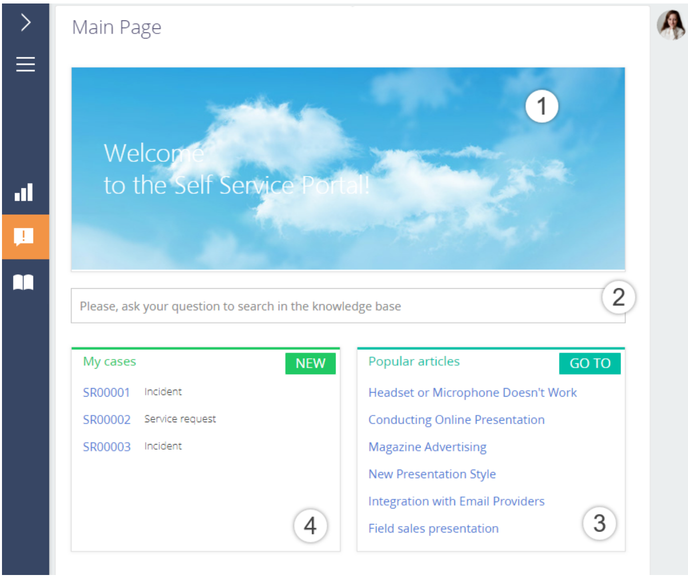
The portal main page provides quick access to the most up-to-date information and common actions on the portal. You can configure the main page, e.g., add the list of currently open cases and configure widgets, e.g., the knowledge base article search.

NOTE
All portal users have default permissions to read the main page data.

Default portal main page contains the following elements (Fig. 27):

- Banner (1)
- Knowledge base search string (2)
- A list of popular knowledge base articles (3)
- A list of cases submitted by the portal user (4)

**Fig. 27** Self-service portal main page



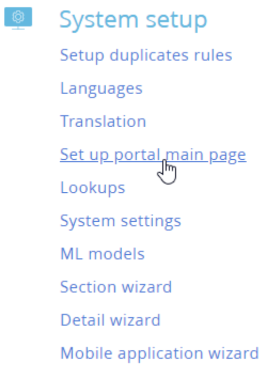

The main page is displayed right after the first authorization by default. You can choose to display a portal section as a start page, e.g., the knowledge base. This is done via the "Portal start page" system setting.

NOTE
If you change the portal start page, the changes will only affect new portal users. To apply changes to existing portal users, change the value of the [Home page] field on the user page manually.

The setup of the portal main page is performed by a system administrator in the Creatio application.

To locate the system setting: click -> System Designer -> [Portal main page setup] (Fig. 28).

**Fig. 28** Locating the portal main page setup area

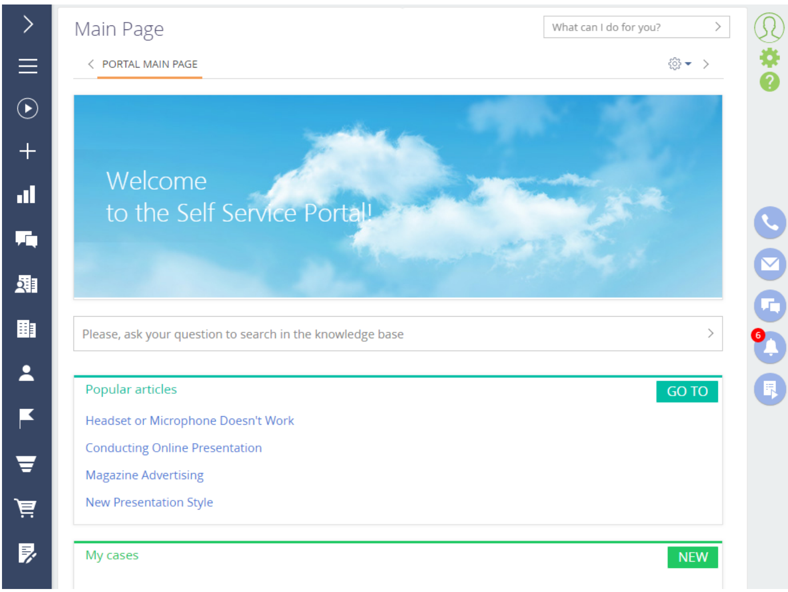



## NOTE

You can set up the portal main page only if you have permission to perform the "Access to portal main page setup module" (CanManagePortalMainPage) system operation. To set up system operation permissions, use the [Operation permissions] section.

As a result, the portal main page setup area will open (Fig. 29).

**Fig. 29** Portal main page setup




Here you can set up:

- The banner. Read more >>>

- Custom lists. Read more >>>
- Graphs and other analytics. Read more >>>

## Access permissions to portal main page elements

When configuring the portal main page, remember to set up the portal user access permissions. In Creatio, the portal user access rights are limited and comply with the "least access" principle, which means that users are prohibited to perform any action that they do not have explicit permission to. If the main page contains the information that the user does not have the permission to read, this information will not be displayed for such users. For example, if the main page contains a chart based on the [Contacts] section data, the users without permission to read the "Contact" object data will not be able to view this chart.

Therefore, when you configure the portal main page:

- First, consider the default permissions the portal user is granted. For example, you can set up the list of knowledgebase articles liked by the current portal user, so the list will be displayed on the portal main page.
- If you want to supplement the portal main page with dashboards containing the data that portal users have no permission to read, set up the corresponding permissions in the [Object permissions] section. Learn more in the "Access permissions on the portal" article.

## Set up portal main page banner

You can display your image on the portal main page. It can be a banner that conveys the style and spirit of your company. The banner is configured as a separate web page. To display your banner, create a separate web page on your website similar to the default banner on the portal.

To do this:

1. Click -> System Designer -> [Set up portal main page].
2. Click -> [Edit].
3. Double-click the "Website with image" block.
4. Specify the title, the page URL and styles (optional).
5. Save the changes.

## Set up custom widgets on the portal main page

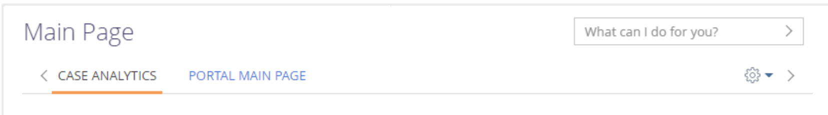
To make it more convenient for the users, the portal main page displays lists of their records in the main portal sections. For the customer portal the list includes the popular knowledge base articles, while the self-service portal displays the knowledge base articles and customer cases. These lists are configured by developer means via the "Widget" dashboard tile. Additionally, you can add custom lists with your own sorting, e.g., a list of user requests. However, such lists will not have the [Go to] button. These lists are configured similarly to the "List" dashboard tile in the main Creatio application. Learn more in the "List" dashboard tile" article.

> NOTE
> Similar to the base dashboard tiles, you can add the custom widget dashboard tile to the main page using the developer means. Learn more about adding a custom widget in the development guide.

## Set up several tabs of the portal main page

You can add several tabs on the main page to display additional data, e.g., case stats (Fig. 30).

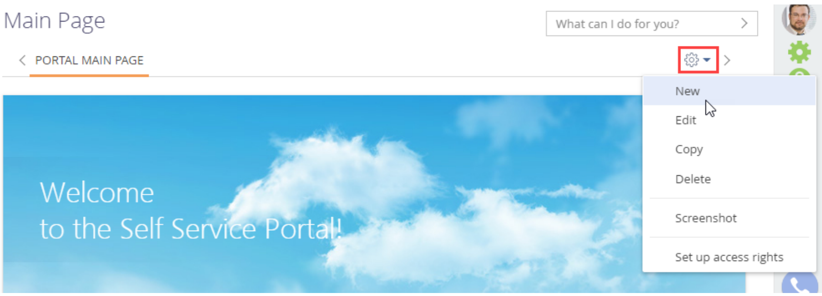
**Fig. 30** Tabs on the portal main page




To add a new tab on the portal main page.

1. Click -> System Designer -> [Set up portal main page].
2. Click -> [New] (Fig. 31).

**Fig. 31** Adding a new tab on the page




3. The process of setting up portal tab contents is similar to that of dashboard tabs. A detailed guide on setting up dashboard tabs is available in the "Dashboard tabs" article.

NOTE

All portal users have default permissions to read the new tab data. If necessary, you can change the access permissions in the [Object permissions] section.

As a result, additional tabs will display on the portal main page. You can navigate the tabs by clicking their titles.

NOTE

The tabs are displayed in alphabetical order. After authorization, the first tab in the list will be opened by default. When setting up the tabs you need to take their titles into account.

Note that the tab area is not displayed on the portal page if there is only one tab in it.

SEE ALSO

- Portal users
- Set up portal sections

# Set up the profile page

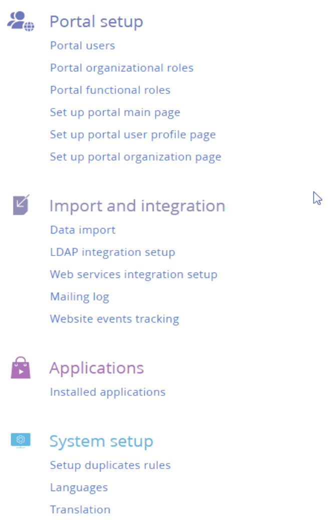
Starting from Creatio version 7. 15. 0, you can customize the portal user profile and organization profile pages using the Section Wizard. Users can add existing fields and details or add new ones. The number of fields and details to display is not limited.

This functionality is only available to users who have access to the [Access to "Access rights" workspace] system operation.

## User profile setup

1. Click —> [Set up portal user profile page].
2. Add new or delete existing fields and details in the Section Wizard (Fig. 32).

**Fig. 32** Setting up the portal user profile page

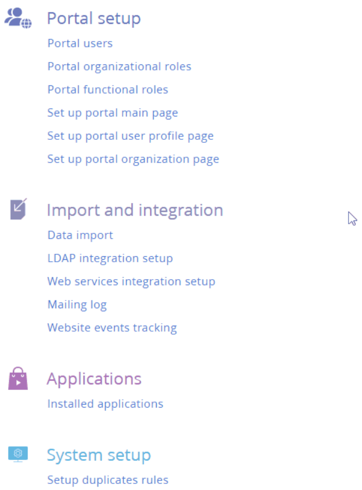



3. Save the changes.

## Organization profile setup

1. Click —> [Set up portal organization page].
2. Add new or delete existing fields and details in the Section Wizard (Fig. 33).

**Fig. 33** Set up the portal organization page




3. Save the changes.

   NOTE

   Learn more about setting up pages in the Section Wizard in the "How to configure section pages" article.

## SEE ALSO

- Set up the portal login page
- Set up the portal main page

# Set up portal sections

You can customize portal sections by configuring them in the Section Wizard in the main Creatio application. Section management capabilities are different depending on the portal configuration:

- If you use the self-service portal, you can modify the existing portal sections but cannot add new sections.
- If you use the customer portal or the partner portal, you can add up to 3 custom sections. You can set up the custom sections in the Section Wizard.

You can use additional objects for configuring section details, lookup fields, etc. The number of available objects depends on the portal configuration and is governed by the license conditions. On the self-service portal, you can add up to 25 objects to a page, and on the customer portal - up to 125. If the number of objects used on the section's record page exceeds these limits, the portal will switch to "read-only" mode.

NOTE

More information about the sections in different portal configurations is available in the "Self-service portal", "Customer portal" and "Partner portal" articles.

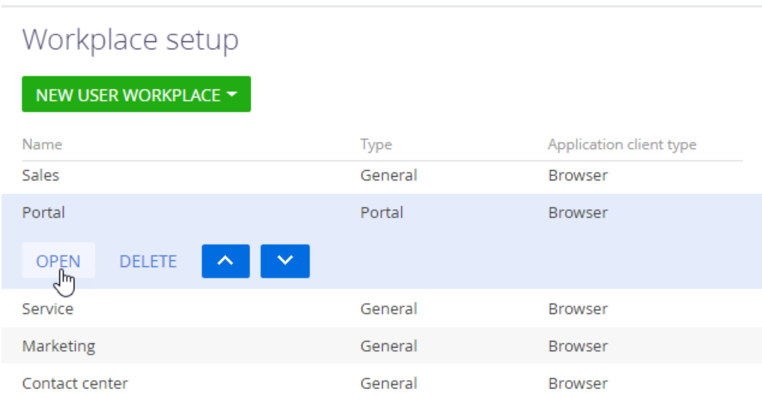
## Set up the portal workplace

To set up the sections of a portal workplace:

a portal workplace:

1. Click —> [Set up view] —> [Workplace setup].
2. Select the needed workplace with a "Portal" type from the list –> [Open] (Fig. 34).

**Fig. 34** Opening a portal workplace




As a result, the workplace setup page opens. From here, you can add an existing section to the portal, create, and add a new custom section, or edit an existing portal section.

Let's configure the a portal workplace, namely:

- Add an existing section to a portal workplace
- Edit an existing portal section

- Add a new section

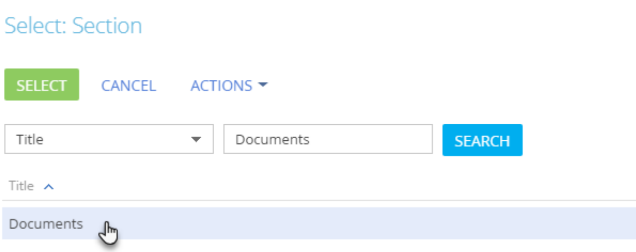
## Add an existing section to a portal workplace

The ability to display existing sections (and the number of sections) on the portal depends on the licensed portal configuration.

To add an existing section to the portal:

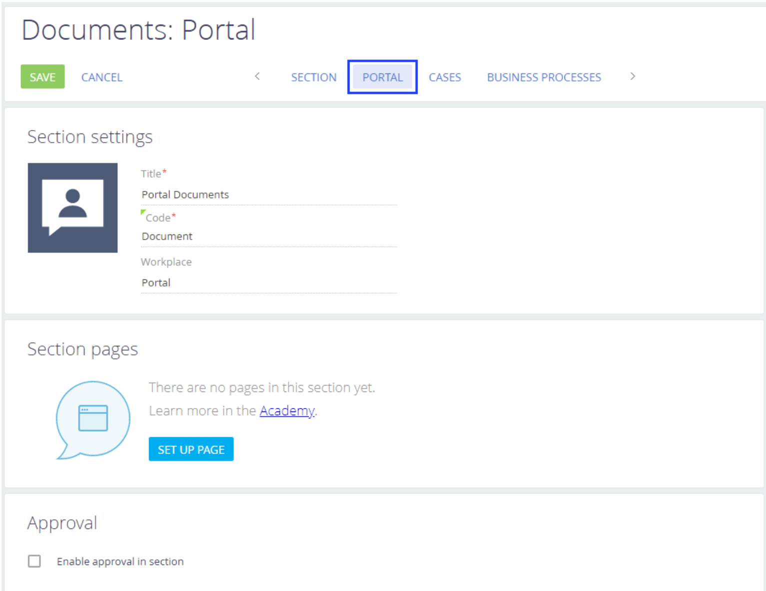
1. Click —> [Set up view] —> [Workplace setup].
2. Select the needed workplace with a "Portal" type from the list –> [Open].
3. On the [Sections] detail, click -> select the section -> [Select] (Fig. 35).

**Fig. 35** Selecting a section to add to the portal




Section Wizard will open, and you will be able to set up the properties of the portal version of the section on the [Portal] tab (Fig. 36).

**Fig. 36** Section Wizard page for adding a section to the portal




4. The [Title] field is populated automatically with the name of the section that is visible to portal users. You can specify a different title to display on the portal, if necessary.
5. The [Code] field is populated automatically and cannot be edited. The [Code] field contains the section code (unique name of the section object) for developers to use.
6. You can change the standard section icon, which will be displayed in the side panel on the portal.

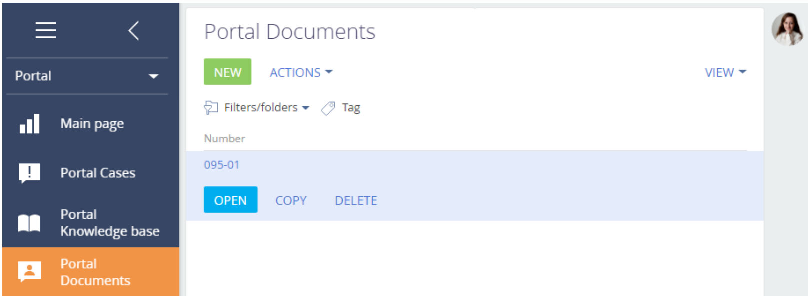
   To change the section icon, hover the cursor over the current icon and click  We recommend using a white icon on a transparent background. Image format: PNG or SVG, size: 38x38 px.
7. Set up the portal section fields and pages. To do this, click [Set up page]. The setup is similar to the section page setup in the primary application and is covered in the "Configure section pages" article.

   NOTE

   Access permissions to fields and details added to the portal page are granted to users automatically when editing portal sections in the Section Wizard. To enable a user to access a new portal section, make sure that the necessary object is managed by records and the portal user has sufficient object permissions. Learn more about access permissions on the portal in the "Access permissions on the portal" article.
8. Select the [Enable approval in section] checkbox to enable approval functions in the section. For more on configuring approvals, see the "How to set up approvals" article.
9. Save the changes in the window and the Section Wizard.

As a result, the selected section of the main application will be added to the portal workplace that you specify (Fig. 37).

**Fig. 37** The [Documents] section on the portal




## Add a new section

Adding new custom sections to the portal is only available in the customer and partner portal configurations.

NOTE

More information about the types of sections in different portal configurations is available in the "Self-service portal", "Customer portal" and "Partner portal" articles.

To add a custom section to the portal:

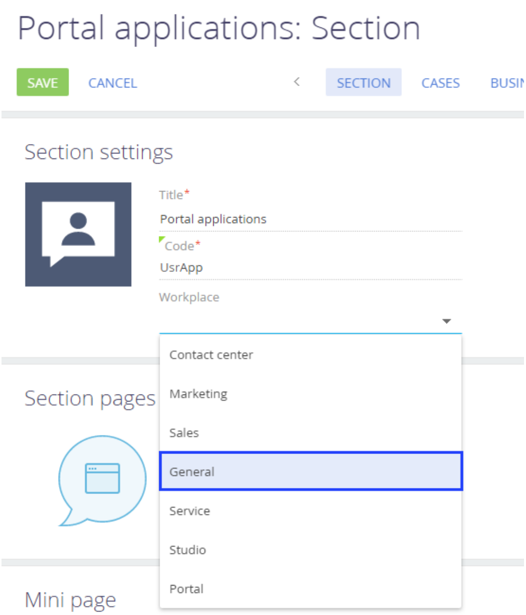
1. Create a new section in the main application using the Section Wizard. Learn more about adding and configuring a new section in the "How to create a section" article.

   In the main properties of the section, specify any workplace of the main application, e.g., "General" in the [Workplace] field (Fig. 38).

   NOTE

   Please do not specify the "Portal" workplace, since a new section is created in the main application and only then added to the "Portal" workplace.

**Fig. 38** Main properties of a new section




2. Click —> [Set up view] —> [Workplace setup].
3. Select the needed workplace with a "Portal" type from the list –> [Open].
4. Add the new section to the "Portal" workplace. The process is described in the "Add an existing section to a portal workplace" article.
5. Save the changes in the Section Wizard.

NOTE

Access permissions to fields and details added to the portal page are granted to users automatically when editing portal sections in the Section Wizard. To enable a user to access a new portal section, make sure that the necessary object is managed by records and the portal user has sufficient object permissions. Learn more about access permissions on the portal in the "Access permissions on the portal" article.

As a result, a new custom section (created in the main b application) will be added to the portal.

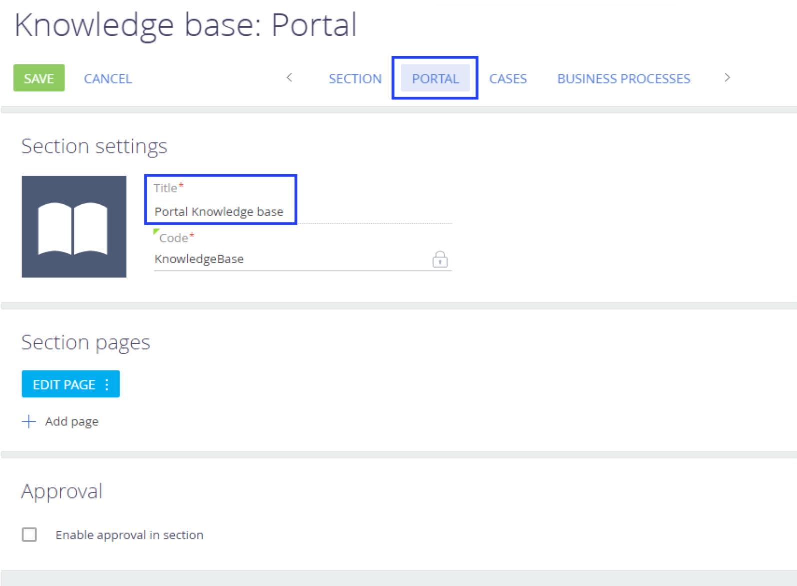
## Edit an existing portal section

While working with a portal section, you may need to change the set of fields or details on the record page. To do this, you will need to edit the "portal version" of the section page. For example, to add two new fields to the section page:

1. Click —> [Set up view] —> [Workplace setup].
2. Select the workplace with a "Portal" type from the list –> [Open].
3. Click the name of the section, e.g., [Portal knowledge base] -> [Section wizard].

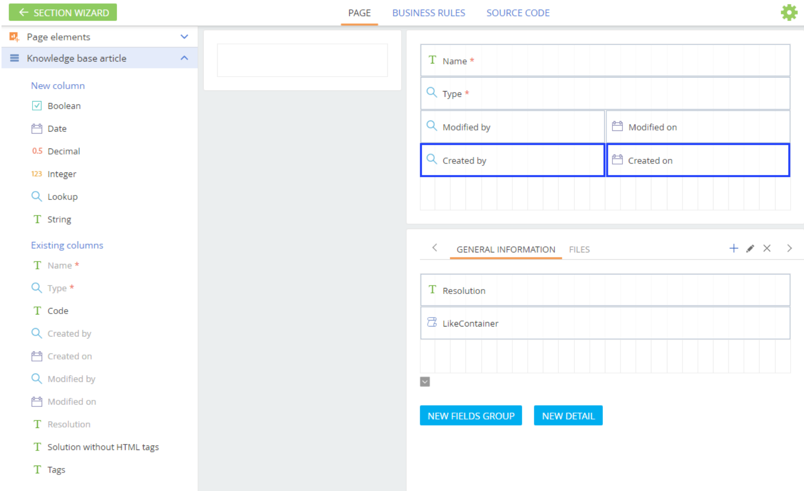
The [Portal] tab of the Section Wizard will open, and you will be able to set up the properties of the portal version of the selected section.

**Fig. 39** The [Portal Knowledge base] section in the Section Wizard




4. Click [Edit page]. The Page Designer opens.
5. Edit the page, e.g., add new fields (Fig. 40). For more on setting up the section page fields, see the "How to set up page fields" article.

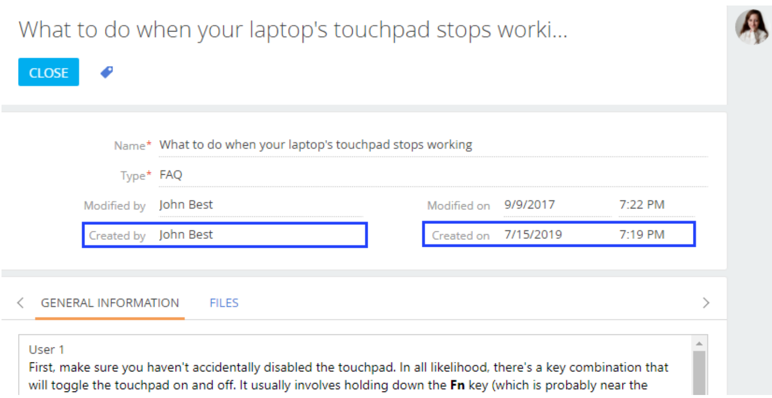
**Fig. 40** Adding the [Created by] and [Created on] fields to the [Portal knowledge base] record page.




6. Save the changes in the window and in the Section Wizard.

As a result, the new fields will be added to the record page on the portal (Fig. 41).

**Fig. 41** New fields on the [Portal knowledge base] section record page




## SEE ALSO

-
- Portal customization

# Working with partner programs

A partner program in Creatio is a representation of the current status and conditions for cooperation between your company and your partner organization. Your partner's employees can populate all partnership data in the [Partner program] section.

> **NOTE**
> The "Partner portal" configuration is available in Sales Creatio enterprise and CRM Creatio.
> Before you proceed to set up the partner program, we encourage you to start with the "Partner portal" article to learn about the general functionality and the basic terminology ("partner," "partnership," and "partner program").

Before you begin working with your partners on the portal, you need to configure it to meet the specifics of your affiliate program. Use the main Creatio application to set up cooperation conditions and manage partner analytics. Creatio comes with a set of tools for configuring partner programs, such as special lookups with pre-set partnership parameters. You will need to examine these pre-set parameters and modify them to suit your specifics. You can also come up with your own partnership parameters and add them to Creatio.

> **NOTE**
> More information on setting up the partnership parameters is available in the "Partner program lookups" section of this article.

## Steps to take to prepare the partner portal for work

1. Outline your partner program.

   We recommend that you capture your partner program parameters on paper or in a spreadsheet. Specify the types of partners you work with. For example, a "reseller", "consultant", etc. Set forth the partner tiers and requirements to achieve a new tier. For instance, "Bronze," "Silver," and "Platinum" tiers for a "Reseller" partner. You can define the cooperation conditions (parameters) for each tier individually. Such parameters can include the number or amount of opportunities, the number of leads, interest debit payable to the marketing funds, etc.

2. Transfer the parameters of the partner program to the main Creatio application.

   Make sure to populate the [Type of partner], [Level of partner], [Level partnership parameters], and [Category of partnership parameter] lookups with your custom parameters, if you have any.

3. Set up personal price lists to take into consideration special conditions for working with partners.

4. Add a new partnership in the [Partnership] section in the main application.

   Adding an active partnership in the main application means that you have reached an agreement with the partner and they officially begin participating in your partner program. The newly created partnership will be available to the partner as a partner program.

5. Create a portal organization for an account of the "Partner" type. Bind partner portal users to the organization and set up corresponding permissions.

6. Send a portal invitation email to the employees of the partner. You can learn more in the "Sending a portal invitation" article.

This article also covers:

- Partner program lookups



ACCELERATE

- Special conditions of partner cooperation
- Working with partner funds
- Example of setting up a partner program
- Partner operation with sections on the portal

## PARTNER PROGRAM LOOKUPS

You can find and set up the partnership parameters in the [Type of partner], [Level of partner], [Level partnership parameters], and [Category of partnership parameter] lookups.

### ATTENTION

When you edit the content of lookups, do not delete base content.

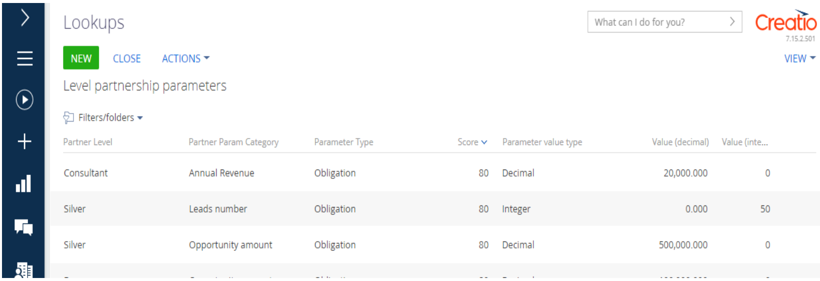
- [Type of partner] is the type of your company and your partner company's cooperation. The [Type of partner] lookup contains the following default types: "Reseller," "Consultant," "Reference," and "Integrator." If you work with partners of other types, you must add these types to the corresponding lookup.
- [Level of partner] is the tier for each type of partner, as well as the target number of points needed to reach that tier. The partners get their points for reaching the performance indicators specified in the [Category of partnership parameter] lookup. When a partner collects the target number of points, they get to the next tier, and their collected points reset. For example, a "Reseller" partner has three tiers: bronze, silver, and platinum.
- [Category of partnership parameter] is a lookup with a list of parameters to evaluate the performance of a partner. This can be the number of leads, the sum of opportunities, the number of certified experts, the marketing budget, and so on.
- [Level partnership parameters] is a lookup that is used to make the rules and conditions of a partnership for each individual tier of the partner program. It uses the values of all lookups specified above.

  In Fig. 42 , you can see an example of partnership conditions for a "Bronze" reseller. In this example:

  - The "Leads number" and "Opportunity amount" parameters are required for a partner to reach the Bronze level. Parameter type – "Obligation."
  - The "Margin" parameter type is the reward of the partner. As soon as the partner reaches the Bronze level, they will have a 10% discount. Parameter type – "Benefit."
  - The "Price list" parameter determines special prices for partners of a specific level. Parameter type – "Benefit."
  - The "Marketing funds" parameter determines the percentage of the opportunity sum that will be paid to the partner marketing funds when a partner closes the opportunity with the "Closed won" status. Parameter type – "Benefit".

  For example, by closing opportunities with the total sum of 100,000 and registering 10 leads, the partner will get 80 points for fulfilling the criteria of each of the parameters. As a result, they will get the Bronze level and a 10% discount. 1% of each successful opportunity will be credited to the marketing funds.

**Fig. 42** Partnership parameters for a Bronze-tier reseller.




After you populate the lookups with the partnership parameters, proceed to the next setup steps.

## SPECIAL CONDITIONS OF PARTNER COOPERATION

When working with partner orders, you can use either the general or personal price lists for different partner categories.

### NOTE

Learn more about price list types and setup in the "Creatio price lists" article.

When working with a partner order, the price is determined as follows:

- Creatio checks whether any personal price list is specified for the partner account and uses the price from that price list. A personal price list is specified on the page of the partner account.
- If the partner has no no personal price or such price list does not contain prices for the ordered products, the order will use the price from the price list specified on the [Partnership parameters] detail of the active partnership. You can specify this price list in the [Level partnership parameters] lookup when finalizing the partnership conditions. More information on setting up the partnership parameters is available in the "Partner program lookups" block of this article.
- If none of the above price lists are provided, then the price from the "Base price list" system setting is used.
- If the base price list is not set, the order will use the price specified on the product page.

We recommend setting up personal price lists if you need to take into consideration special conditions of cooperation with your partner.

### NOTE

You can set up the personal price lists for partners in the main Creatio application.

The setup procedure:

1. Create a price list with a special product price. To do this, use the [Price lists] lookup and the [Prices] detail on a product page.
2. Add a [Price list] field on the partner account page. To add a new field (column), use the Section Wizard tool in the [Accounts] section.
3. Specify the personal price list on the pages of the corresponding partners.

**NOTE**

You can learn more about setting up personal price lists in the "Creatio price lists" article.

As a result, each time a product with a special price is added to the order of the selected partner account, such price will be taken from the personal price list specified on the partner account page.

## WORKING WITH PARTNER FUNDS

Creatio can credit a specific percentage of interest to the funds of partners. Use this logic to automate working with the marketing funds. Creatio can automatically credit a percentage from the amount of an opportunity that the partner successfully closed – to special "marketing funds." The partner can use the marketing fund to initiate promotions and other marketing activities. Creatio will then deduct the activity budget from the partner's marketing funds.

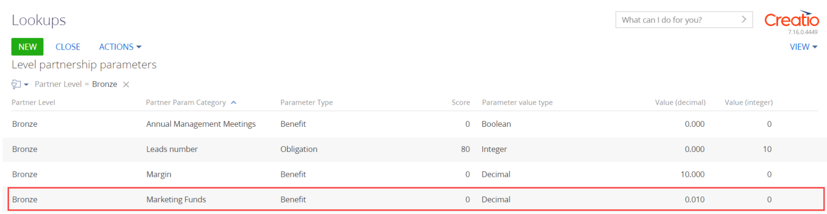
You can also add custom partnership funds and manually credit or debit them.

### Setting up partnership funds

In the Creatio main application, perform the following actions:

1. Open the System Designer, e.g., by clicking .
2. Go to the [System setup] block –> click [Lookups].
3. Open the [Level partnership parameters] lookup.
4. Set parameters of fund credits as per the partner levels (Fig. 43).

**Fig. 43** Parameters of crediting the marketing funds for a "Bronze" level partner

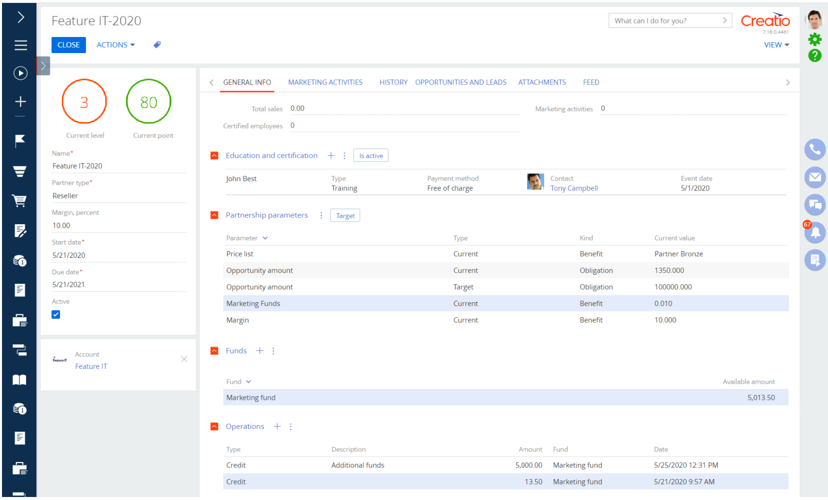



5. Add a partnership. You can learn more about adding partnerships in the "Create a new partnership in the [Partnership] section" article. Note that the [Active] checkbox on the partnership page must be selected to be able to work with funds.

As a result, the specified parameters for crediting the marketing funds will automatically display on the partner page in the main application (Fig. 44), as well as on the [Partnership parameters] detail on the portal. A [Marketing fund] record will be added on the [Funds] detail. When an opportunity is closed with the "Closed won" result, the marketing funds will be credited with the percentage of the amount from the opportunity budget. This percentage depends on the partner level.

You can add another fund manually by clicking + on the [Funds] detail.

**Fig. 44** Partner program page in the main application



You can view the remaining sum of the funds on the partnership page under [General info] –> [Funds]. Partners can access this information by opening the partnership page on the portal.

## Credit and debit operations with funds

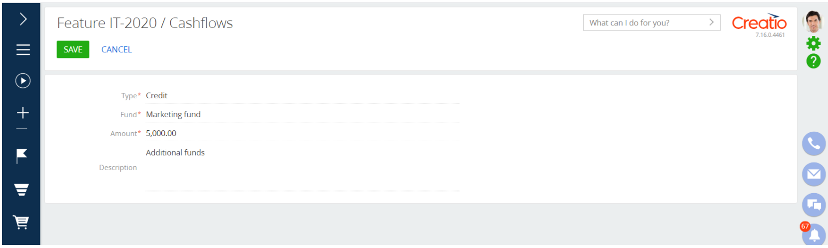
The funds are credited automatically when a partner opportunity is closed with the "Closed won" status. The amount of funds is recalculated based on the opportunity sum, opportunity stage, or the partner. When an opportunity is deleted, the corresponding sum is debited from the amount of the marketing funds. These actions display on the partner page –> [General info] –> [Operations] of the partnership page in the main application, as well as on the portal.

You can also credit or debit funds manually. Manual operations are available for marketing funds as well as for other types of funds.

To charge or write-off funds:

1. Open the partnership page in the main application.
2. Go to the [General info] tab –> [Operations] detail –> click +.
3. Populate the fields on the opened page:
   a. [Type] – select the type of operation: credit or debit.
   b. [Fund] – specify the name of the fund.
   c. [Amount] – specify the sum for crediting or debiting.
   d. [Description] – add comments to the operation. This field is optional.
4. Click [Save] (Fig. 45).

**Fig. 45** Example of a credit operation to the fund



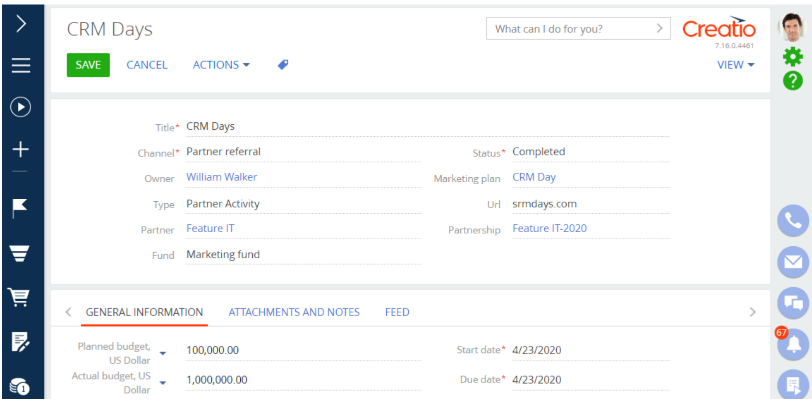

The changes will display in the main application, as well as on the portal. The partners only have permission to view the [Operations] and [Funds] details.

## Budgeting partner marketing activities from the funds

When a partner adds a new marketing activity in the [Marketing activities] section on the portal, the partnership page of the main application displays a record with the “Partner activity” type on the [Marketing activities] tab. The partner will be specified as the portal organization account.

If you open the record, you can specify the portal user as the activity owner and set the marketing activity budget (Fig. 46).

**Fig. 46** Partner program page in the main application




If you specify a marketing fund in the [Fund] field of the record, the corresponding sum will be automatically debited from the specified fund once you save the record. If you edit or delete a record, Creatio will update the transaction and recalculate the funds. The recalculated funds display on the [Operations] detail of the partner program.

You can also create partner activities in the main application. The funds will be debited similarly.

## EXAMPLE OF SETTING UP A PARTNER PROGRAM

Let’s walk through the steps of preparing a partner portal and creating a partner program to start working with the partner.

## CASE

Set up a partner program. Under its conditions, you grant a discount to a reseller partner. The discount sum depends on the number of registered leads and the sum of closed opportunities. Additionally, the partner program provides your partners with the ability to achieve a new tier: from the Bronze tier to the Platinum tier. Your partners can also have extra discounts. The amount of such discounts grows as your partner reaches new tiers.

## Compartmentalize your and your partner's cooperation parameters

If you are already working with your partner under certain conditions, you can streamline your cooperation parameters and capture them on paper or a spreadsheet. For instance, the parameters of a reseller partnership can be represented as in Fig. 47:

**Fig. 47** Table with partnerships parameters

| | | Reseller | | |
|---|---|---|---|---|
| Category of parameter | Type of parameter | Bronze | Silver | Platinum |
| Leads number | Obligation | 10 | 20 | 30 |
| Opportunity amount | Obligation | 100000 | 500000 | 1000000 |
| Discount | Benefit | 10% | 15% | 20% |

Based on this, you will need to populate the lookups as follows:

- [Type of partner] – "Reseller."
- [Level of partner] – "Bronze," "Silver," "Platinum."
- [Category of partnership parameter] – number of leads, opportunity amount, partner discount, percentage of credits to the marketing fund.
- [Type of partnership parameter] – "Obligation," "Benefit."

## Add the partnership parameters to the appropriate Creatio lookups

The partnership parameters in Fig. 47 are available in Creatio out of the box. You only need to add the partnership parameters required for the cooperation with your partner if they are not yet available in the lookups.

## Create a new partnership in the [Partnership] section

In the main Creatio application:

1. Open the [Partnership] section. This section is available in Sales Creatio enterprise and CRM Creatio. You may need to add the [Partnership] section to at least one workplace before it becomes available in the left menu.
2. Click the [New partnership] button.
3. Populate the fields in the mini page that pops up. Refer to the partnership parameters table when populating the fields.
   a. Select your company's partner in the [Account] lookup.
   b. Specify the type of your partner in the [Type] field.

c. Specify the time frame of the partner program using the [Start date] and [Due date] fields. The period is 1 year by default.

d. Leave the [Active] check box selected if you want the portal page to display the partnership as a partner program. At the same time, you can uncheck this checkbox when needed and make the partner program unavailable to your partner (e.g., when creating different programs for different periods).

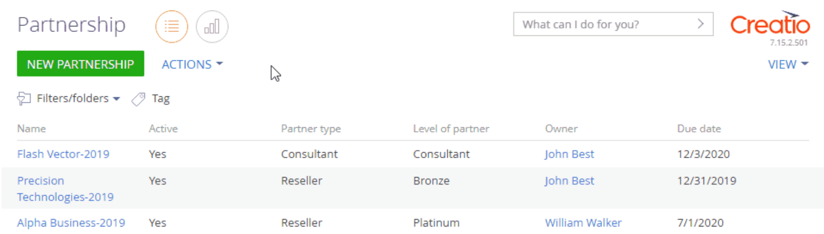
4. Save the changes (Fig. 48).

As a result, the specified partner parameters in the lookups, including the partner funds, will automatically display in the main application, as well as in the partner program on the portal.

NOTE

Only users with the “Partner portal users” role may have access to the partner program.

**Fig. 48** Adding a new partnerships and partner program




## Prepare the partner organization for working on the portal

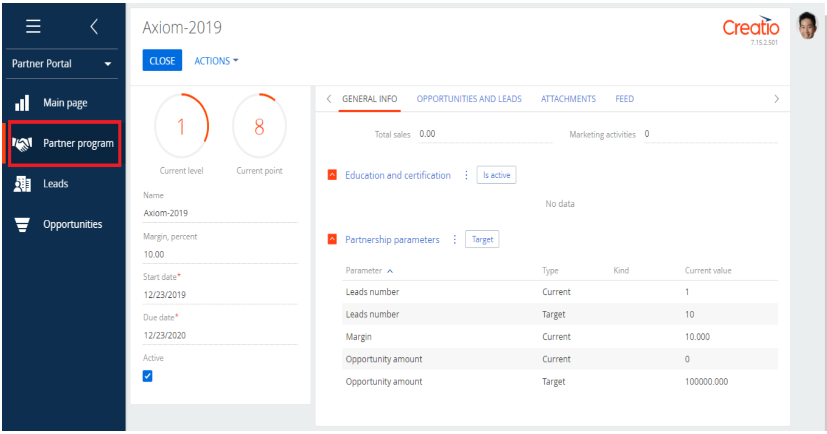
1. Create a partner portal organization and bind it to portal users. This process is covered in the “Add portal users” article. Please note that you need to choose the “Partners” role in the [Parent role] field on the profile organization page when creating a partner portal organization.

2. Configure access permissions for the portal users of the partner organization. To access the partner portal functionality and work in the partner program, a portal user must be assigned the “Partner portal users” functional role. More information on the portal user roles is available in the “Managing portal user roles” article.

3. Send portal invitation emails to partner portal users to enable them to log in to the partner portal and participate in the partner program. The procedure for sending portal invitation is available in the “Sending a portal invitation” article.

As a result, users with the "Partner portal users" functional role will be able to access the [Partner program] section (Fig. 49), which stores all conditions and the current status of each partnership.

**Fig. 49** The [Partner program] section




## PARTNER OPERATION WITH SECTIONS ON THE PORTAL

After receiving the invitation and logging in to the partner portal, the employees of the partner can work with the [Leads], [Opportunities] and [Orders] sections. Their functionality is similar to the functionality of the corresponding sections in the main Creatio application.

In the [Leads] section, the employees of the partner can register new leads and nurture them using lead management processes. More information about lead management is available in the "[Leads] section" article. In the [Opportunities] section, the employees of the partner can use corporate sales processes. More information about sales management is available in the "[Opportunities] section" article. In the [Orders] section, the employees of the partner work with orders. More information about working with orders is available in the "[Orders] section" article.

All changes on the partner portal are carried over to the main application. This works both ways. To calculate the performance of partners, the partner program uses lead and opportunity details by default. You can also find them on the partnership page in the main application. With the portal, your partners will have access to special marketing funds that will automatically increase as the partners close opportunities. These funds can be used to organize partner marketing activities.

Partners can also create their own activities. To do this, they can use the [Marketing ativities] section. The [Status] field of the newly created marketing activity record is automatically set to "In progress." You can approve partner marketing activities and set their budget in the main application.

When a partner adds a new marketing activity, the partnership page of the main application displays a record with the "Partner activity" type on the [Marketing activities] tab. The partner will be specified as the portal organization account.

### SEE ALSO

- Partner portal

# Working with portal

On the portal, users can find answers to frequently asked questions, use reference information and other materials that are published in the Portal Knowledge base, as well as register cases to the support on their own or receive prompt answers to their questions from company employees in the feed. Portal users can participate in other (custom) processes, e.g., agreeing requests, providing services, etc.

### NOTE

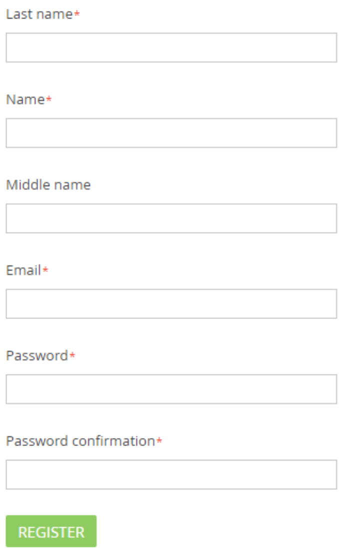
Learn more about Creatio portal editions and their features in the "Portal" article.
The examples provided in this article may be specific to certain portal editions (self-service portal or customer portal).

This guide covers all built-in features available to portal users.

1. Portal registration and login – the article covers the sequence of actions for registering a portal user. The article also contains guides on how to log in to the portal and change/recover a portal user password.
2. Working with the portal knowledge base – description of the reference information resource available for portal users. The article also describes different ways of searching for information in the Portal Knowledge base.
3. Working with the portal Cases – description of the primary communication channel between portal users and the support service. The article covers all case-related operations, including case registration, cancellation, customer feedback, etc.
4. Working with the portal list – the article covers how to set up column layout in the portal section lists. You can also find instructions on setting up groups for filtering records in the list.

## CONTENTS

**Fig. 2** Registration form




4. An email with an activation link will be sent to the email address you entered. Follow the link to confirm the registration.

   After confirming the registration, you can log in using your registration data. Your email address serves as your username.

## How to access the portal

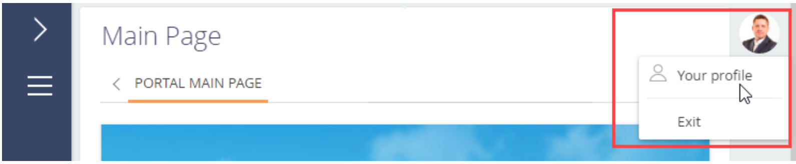
To access the portal, you need to log in.

1. Switch to the portal authorization page. Enter the portal access URL that you received from your system administrator into the web browser address bar. Learn more about the portal access URL in the “How the portal users can register on their own” block of this document.
2. On the authorization page:
   - If you are already registered, enter your username and password on the login page and click [Login]. After you log in, you will be redirected to the portal main page.
   - If you are not registered on the portal and you do not have a username and a password, you need to register on the portal through the self-registration procedure or contact the Creatio administrator.

## How to manage personal data

On the portal, you can access and edit your profile data. To do this, click your profile picture in the top right —> [Profile] (Fig. 3).

**Fig. 3** Opening the user profile settings




Users who are part of your organization can also access the [Service] tab, which contains information on service agreements and available services.

NOTE

Portal administrators can also access the organization's profile. System administrators can customize the appearance of a portal user's profile and the organization's profile. Learn more in the "Set up the profile page" article.

## How to manage passwords

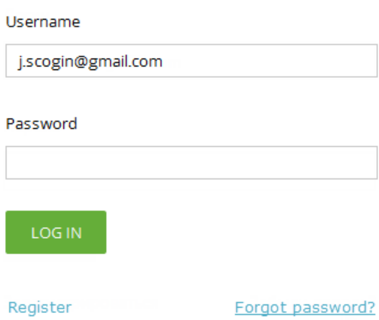
You can change or recover your password.

### How to recover your portal password

If you forgot your password to access the portal:

1. Go to the login page and enter your email address that was specified during the registration in the [Login] field, then click the [Forgot your password?] link. (Fig. 4).

**Fig. 4** Password recovery



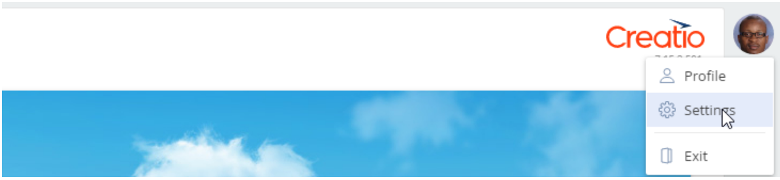

2. An email with a recovery link will be sent to the specified email address. After clicking this link, a special page for entering a new password will open.

### Change password

To change the current password:

1. Log in to the portal —> [Settings] (Fig. 5).

**Fig. 5** Opening the user profile settings

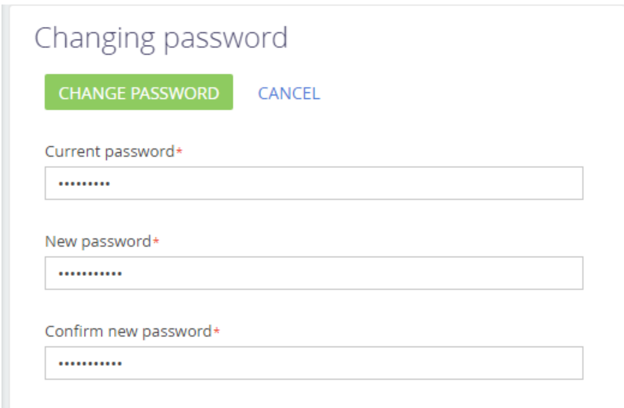



NOTE

You can also change the user password by selecting the [User profile] menu option in the portal main menu.

2. Click the [Change password] button. Enter the current password, then enter the new password and confirm it (Fig. 6).

**Fig. 6** Password recovery




3. After clicking the [Change password] button your password will be changed.

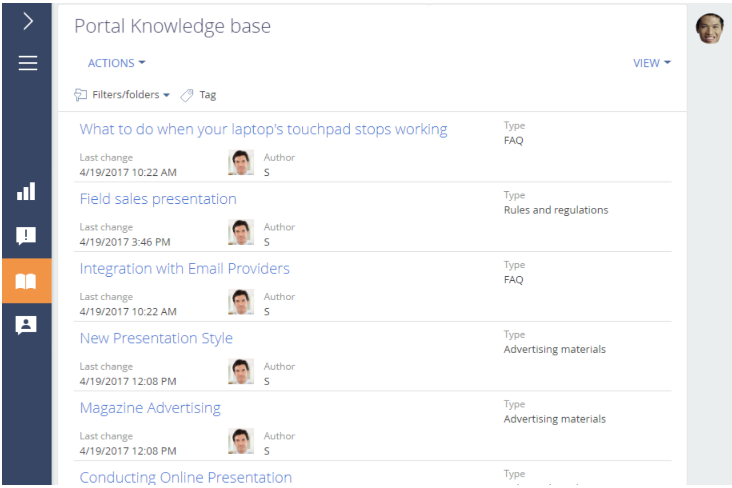
SEE ALSO

- Working with the portal knowledge base
- Working with the portal Cases

# Working with the portal knowledge base

The knowledge base is a storage of reference information. For example, here you can store the answers to frequently asked questions, rules and regulations, document templates and advertising materials. Here you can find the information you need and leave your comments to the published materials (Fig. 7).

**Fig. 7** The [Portal Knowledge base] section




## KNOWLEDGE BASE ARTICLE PAGE

The knowledge base article page consists of a number of fields containing article general data, as well as [General information] and [Files] tabs.

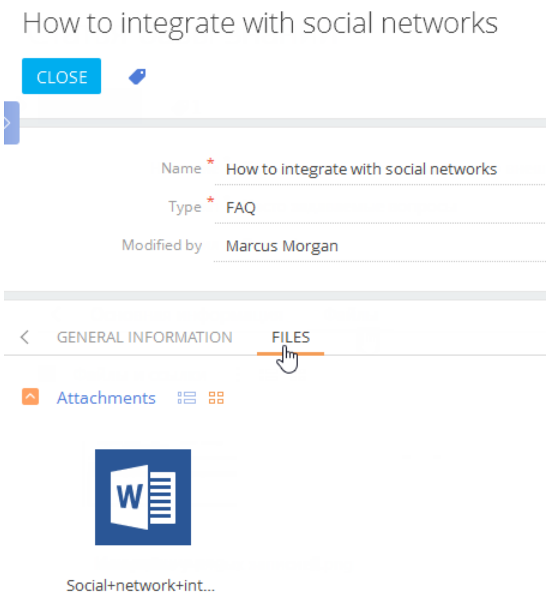
| Field | Description |
|---|---|
| Account name | Knowledge base article title. |
| Type | Knowledge base article type, for example, “Rules and regulations” or “FAQ”. |
| Modified by | User who last edited the article. |
| Modified on | Date and time of the last edition of the knowledge base article. |

The [General information] tab contains the article text area and comment area.

Portal users can leave comments to the knowledge base articles. To do this, type the text in the box at the bottom of the page and click [Publish].

Use the [Files] tab to access attachments and links related to the knowledge base article. For example, from this detail you can download documents or take advantage of the useful links connected to the article (Fig. 8).

**Fig. 8** The [Files] tab of the [Knowledge base] section




## HOW TO FIND AN ARTICLE IN THE KNOWLEDGE BASE

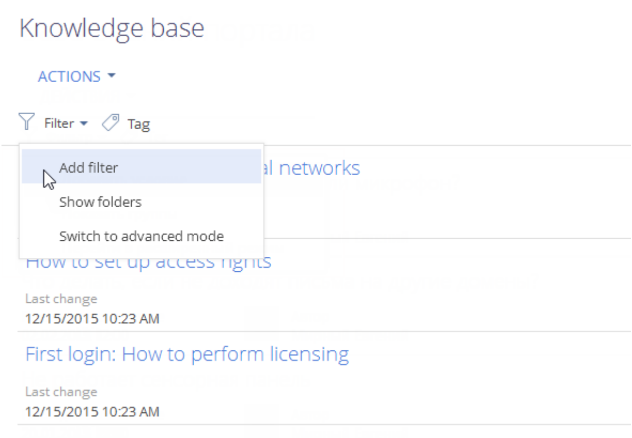
Search functions in the portal knowledge base include:

- Knowledge base search widget on the portal main page.
- Configure the filters in the [Portal Knowledge base] section. The setup procedure is described below.
- Knowledge base article tags. Assign a tag or a set of tags to any knowledge base article and filter section records by tags. You can find an example of tagging records in the "How to tag records on the portal" article.

### Setting up filters in the [Portal Knowledge base] section

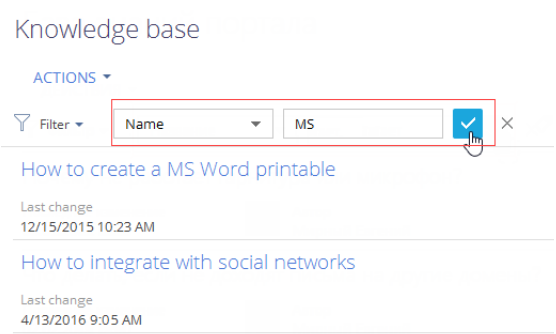
1. Open the [Portal Knowledge base] section.
2. From the [Filter] menu, select the [Add filter] option (Fig. 9).

**Fig. 9** Accessing filters in the [Portal Knowledge base] section




3. To search articles by title, select the [Name] field, enter the title of the article or a part of it and click (Fig. 10).

**Fig. 10** Searching for an article by its title in the [Portal Knowledge base] section



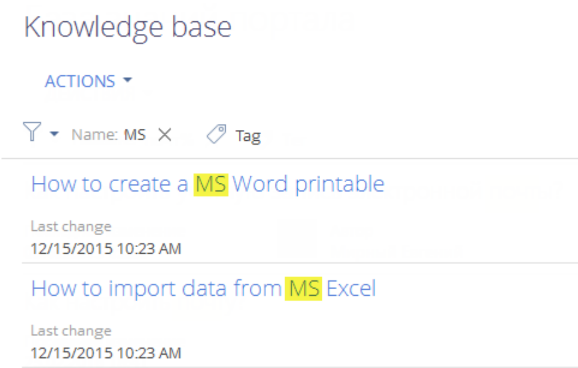

After you click , the knowledge base will display only the articles that match the filter (Fig. 11).

4. To disable a previously configured filter, click × .



ACCELERATE

**Fig. 11** Searching for an article in the [Portal Knowledge base] section by a part of its title




## NOTE

You can set up filter by any field in the [Portal knowledge base] section. For example, add a filter by the [Date] field to view all articles created during certain period.

## SEE ALSO

- Working with the portal Cases
- Working with the portal list

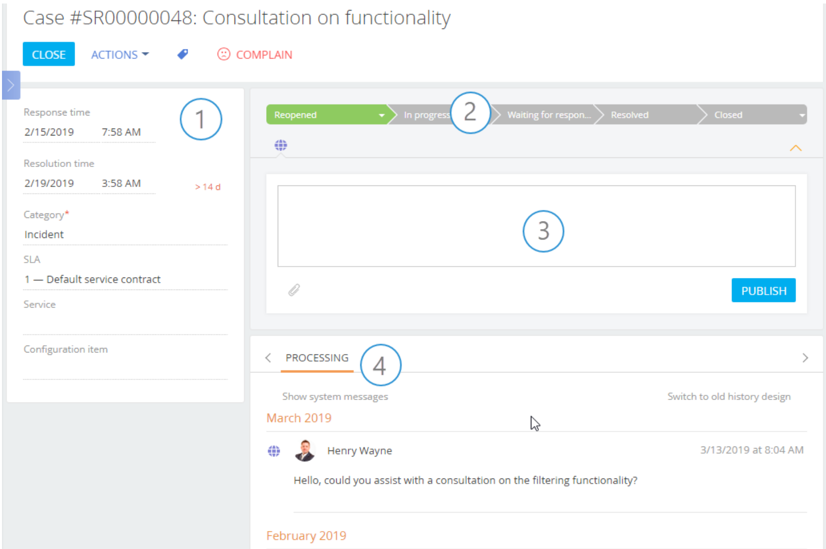
# Working with the portal Cases

The [Portal Cases] section is available in the self-service portal by default. Here, you can submit support tickets (i.e., "cases"), track their resolution progress and communicate with support staff.

## CASE PAGE ON THE PORTAL

Portal case pages consist of case profile (1), workflow bar (2), message panel (3) and the [Processing] tab (4) (Fig. 12).

**Fig. 12** Case page on the portal




The case page contains a [Complain] button for passing your service-related comments and notes to the support, even for closed cases. Click this button to open a new window for publishing comments and notes.

The case number and its subject are displayed at the top left of the page. The number is generated automatically, based on the specified template. Case subject is also generated automatically, based on the selected service and case category.

On the left side of the page, you can find a case profile (1) with general information about the case.

At the top right of the page, there is a workflow bar (2) that shows current stage of the case processing.

Enter detailed case information in the message panel (3) below the workflow bar to converse with the staff regarding the case resolution. You can attach files to your messages.

## Case profile

General case information.

| | |
|---|---|
| Response time | Case response deadline, representing the time limit between the case registration and the moment the case processing starts. The deadline is calculated automatically and depends on the selected service. This is a non-editable field. An indicator of the remaining/overdue time is displayed to the right of the field. |
| Resolution time | A deadline for resolving the case. The deadline is calculated automatically and depends on the selected service. This is a non-editable field. An indicator of the remaining/overdue time is displayed to the right of the field. |
| Category | A case can have one of the following categories: service request, incident or consultation (this category is available only in Financial Services Creatio, customer journey edition). Once the record is saved, the field becomes non-editable. The field is populated automatically, when a service is specified. |
| Service agreement | The field is available only for Service Creatio, enterprise edition. The service agreement that stipulates the conditions of case resolution. Once the record is saved, this field becomes non-editable. When a new case is created, the proper service agreement is selected automatically. |
| Service | The service, which facilitates the case resolution. For Service Creatio, enterprise edition, only services provided under the user's service agreements are available. |
| Configuration item | The field is available only for Service Creatio, enterprise edition. The primary configuration item, which is related to the case (e.g., the component in which an issue occurred). In this field, you can enter one of the configuration items connected to the case contact, their department or case account. |

## Service agreement selection

The field is available only for Service Creatio, enterprise edition.

Case service agreement is determined by selecting the agreement with the highest priority. The service agreement priorities are as follows:

1. Contact service agreement (portal user is specified as the service object of the agreement).
2. Department service agreement (portal user's department is specified as the service object of the agreement).
3. Account service agreement (portal user's account is specified as the service object of the agreement).

If only one service agreement with the highest priority is found, it will be automatically specified in the [Service contract] field. If several agreements with the same priority have been found, the [Service agreement] field will not be populated, and you will need to select one of the available service agreements manually. If there are no records that match the conditions, the field will be populated with the default service agreement.

### The [Processing] tab

Feedback

This field block displays information about case rating and reason for closing.

| | |
|---|---|
| Satisfaction level | Service level grade given by the user after the case is resolved. |
| Feedback notes | Additional comments. |

The [Feedback] field block becomes available after a case is assigned the “Resolved”, “Closed” or “Canceled” status. The case author will receive an email notification, prompting them to grade the customer service level and leave feedback.

History

The detail contains the communication history of the case. The history includes:

- Emails sent and received in the process of resolving the service request or incident.
- Messages posted by employees and portal users on the customer portal. Messages that contain attachments are marked with the icon. The first attachment is shown as a link in the lower left corner of the message. Click the [Read more] link to view other attachments.

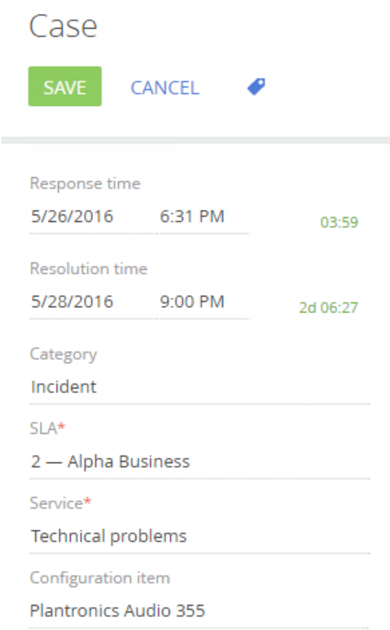
## HOW TO SUBMIT A CASE FROM THE PORTAL

There are two ways to submit a case – you can either go to the [Portal Cases] section and click the [New case] button (Fig. 13) or click [New] on the portal main page, in the "My cases" block.

**Fig. 13** Adding a new case

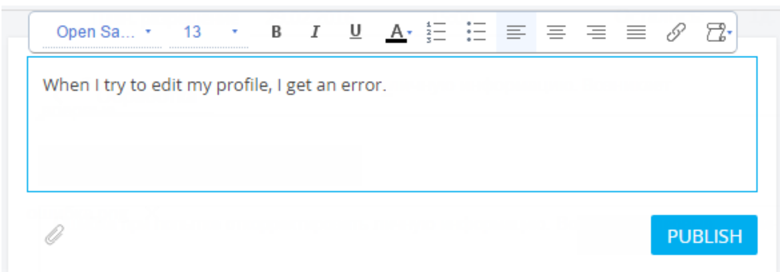

A new case page will open, where you can enter the case information in the corresponding fields (Fig. 14).

**Fig. 14** Populating case fields



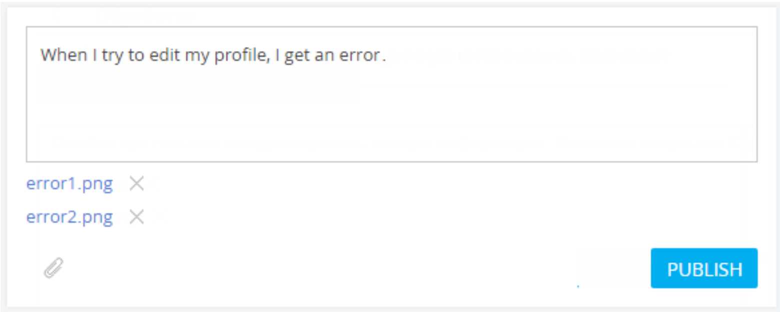

1. The [Service agreement] field (available only for Service Creatio, enterprise edition) will be populated automatically in accordance with the service agreement. If you have multiple service contracts, you can manually select the necessary service contract.
2. In the [Service] field, select the service that your request is related to. The service you choose determines the case category as well as response and resolution deadlines (Fig. 14).
3. Enter all necessary details in the message panel (Fig. 15).

**Fig. 15** Message panel



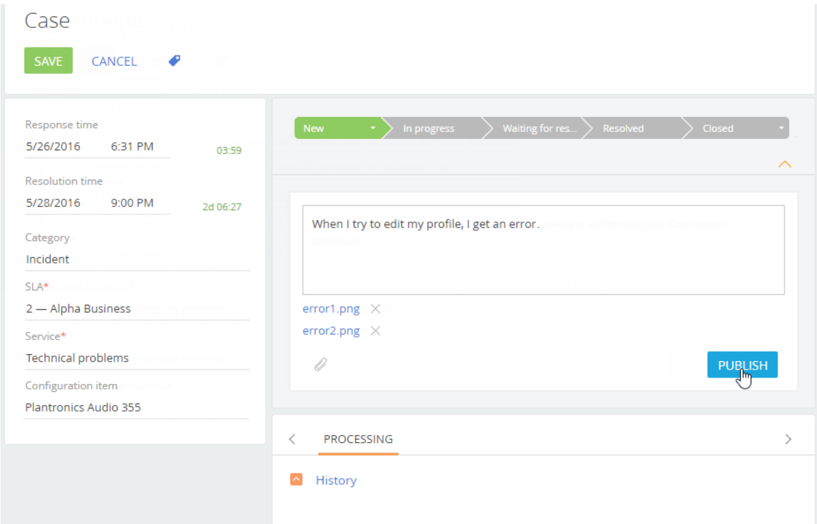
4. You can attach a file to illustrate, clarify or supplement the information on your case. To do this, click under the message entry form and select the file. You can attach several files to a case. The attached files are displayed as hyperlinks (Fig. 16).

**Fig. 16** A file attached to a case




5. When ready, click [Submit] (Fig. 17).

**Fig. 17** Submitting a case




As a result, the case is saved and a unique number is assigned to it automatically.

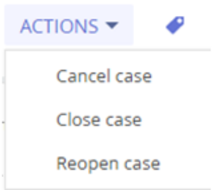
## HOW TO MANAGE CASES ON THE PORTAL

You can manage the case status from the case page on the portal. The following case management actions are available in the [Actions] menu for portal users (Fig. 18):

- Cancel case

- Close case
- Reopen case.

**Fig. 18** Case actions that you can perform on the portal




## Canceling a case on the portal

If a case was created by mistake, or if the response for this case is no longer required, you can cancel the case. To do this, select the [Cancel case] option from the [Actions] menu.

The support team member will see the following case changes in the primary application:

- The case status changes to "Canceled";
- The "Canceled by user" value is set in the [Reason for closing] field;
- The [First resolution time], [Actual resolution time] and [Closed on] fields are populated with the date and time when the case was canceled on the portal.

## Closing the case on the portal

Portal users can close their cases if the solution has been provided but a support engineer has not yet closed the case. To close a case on the portal, select the [Close case] option from the [Actions] menu.

The support team member will see the following case changes in the primary application:

- The case status changes to "Closed";
- The "Closed by user" value is set in the [Reason for closing] field;
- The [Closed on] field is populated with the date and time when the case was closed on the portal.

## Reopening the case on the portal

You can reopen cases that have the "Resolved" and "Waiting for response" status if the provided solution did not resolve the case issue.

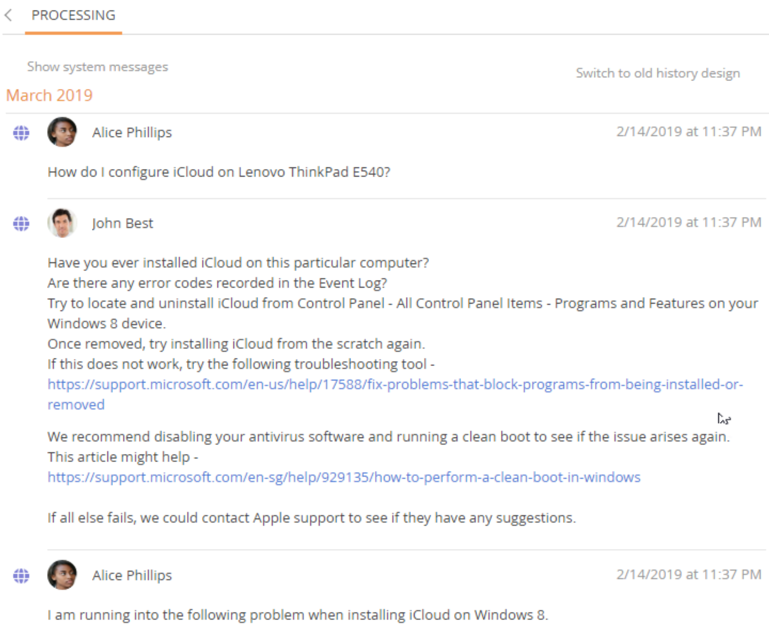
To do this, select the [Reopen case] option from the [Actions] menu.

The support team member will see that the case status has changed to "Re-opened".

# HOW TO COMMUNICATE WITH SUPPORT STAFF VIA PORTAL MESSAGES

While a case is being processed, you can communicate with the support team members using the chat functions available on the case page. You will be notified by email when you receive a message concerning your case. The history of case processing is displayed in the [Processing] tab of the case page (Fig. 19).

**Fig. 19** Communication history on the case page

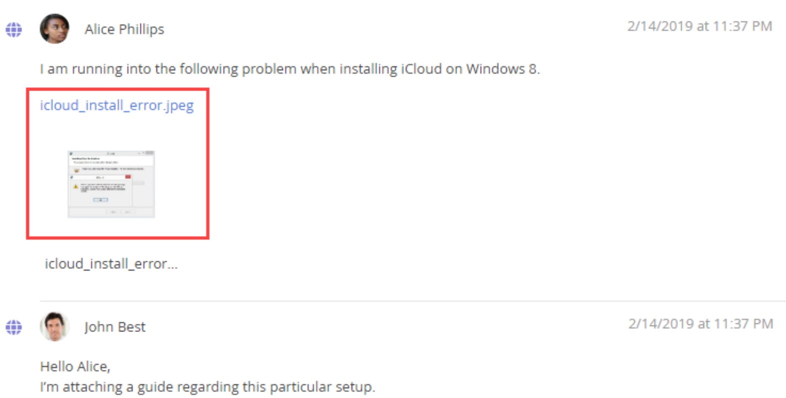



This tab is used as a communication channel between the users and the support team members involved in the case resolution. By default, you can add comments to the posts that are not assigned with the "Closed" status.

To post a message, populate the corresponding fields and click the [Send] button.

Attach a file to the message if necessary. Files sent during the conversation are displayed as links, and clicking the links initiates opening the files (Fig. 20). To download an attachment, click its title.

**Fig. 20** An attached file in the case processing history



# HOW TO LEAVE CASE FEEDBACK ON THE PORTAL

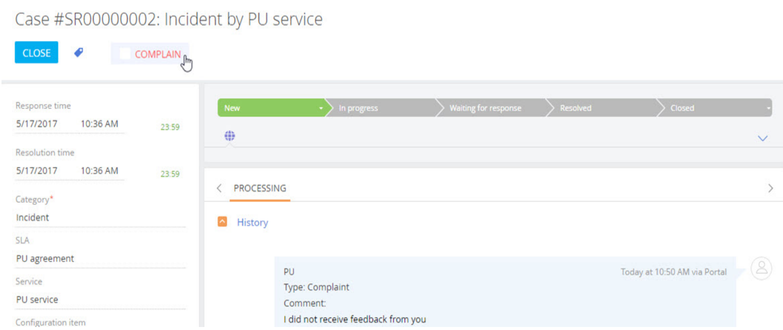
You can evaluate the quality of service provided for your case at any stage of its life cycle.

Case processing results can be used to evaluate the service satisfaction. For this, populate the [Feedback] detail fields of the case page. The [Feedback] field block becomes available after a case is assigned the "Resolved", "Closed" or "Canceled" status. Case author will receive an email notification to fill out the feedback fields.

If during the processing of your case, you receive comments or notes, you can easily pass them on to the support team. To do this:

1. Open the case page on the self-service portal.
2. Click the [Complain] button in the top left corner of the case page (Fig. 21).

**Fig. 21** The [Complain] button on a case page




3. In the opened window, enter your feedback.
4. Click [Complain].

A comment with the "Complaint" type will be displayed in the communication history on the case page. This will draw the attention of the support team to the case and improve the quality of service.

Unlike usual comments, you can leave complaints on resolved and canceled cases.

## SEE ALSO

- Working with the portal knowledge base
- Working with the portal list
- Portal registration and login

# Working with the portal list

The data on the portal are represented in the list view. A list contains records, each one having a group of fields. You can choose which information will be displayed in each section list.

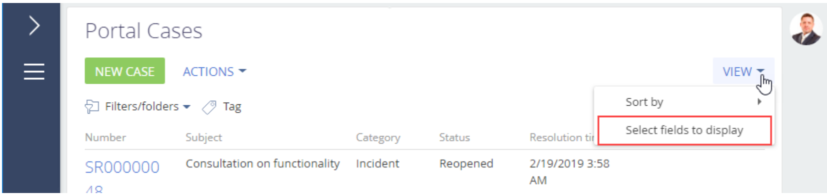
NOTE

More information about Creatio section lists is available in a Record lists article.

## HOW TO SET UP DISPLAYING OF INFORMATION IN THE PORTAL SECTIONS

You can choose which information is displayed in each section list. To set up lists, use the [View] menu (Fig. 22).

**Fig. 22** List setup menu of the [Portal cases] section




CASE

Add case response time information to the list of the [Portal Cases] section.

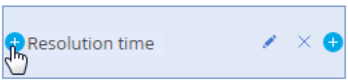
1. Go to the [Portal Cases] section.

NOTE

The [Portal Cases] section is available in the self-service portal by default.

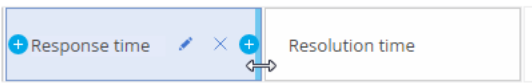
2. In the [View] menu, select the [Select fields to display] command.
3. Select the column, whose information you want to display and click ⊕ (Fig. 23).

**Fig. 23** Adding the [Resolution time] column to the list




4. A column selection window opens. Choose the “Response time” in the drop-down list and click the [Select] button.
5. Adjust column width if needed. To do this, drag its border with your mouse.

**Fig. 24** Changing a column width

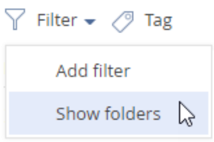



6. Save the new settings.

## HOW TO GROUP RECORDS ON THE PORTAL

Use folders to segment records on the portal. Select [Filter] > [Show folders] to view folders in the current section Fig. 25).

**Fig. 25** Opening the folder tree




### NOTE

More information about Creatio folders is available in the Folders article.

You can create a custom folder structure, as well as set up rules for populating the folder contents. Deleting a folder will not result in deleting the records contained in it.

Section folders have a tree-like structure. A folder position in the structure does not affect its properties: if a record is included in one of the subordinate folders, it does not necessarily mean it is included in the parent folder.

To create a root folder, select the [All] folder and click the [New folder] button.

To create a subordinate folder, select a parent folder and click the [New folder] button.

### CASE

View all unresolved service requests in the [Portal cases] section.

1. Go the [Portal Cases] section.

### NOTE

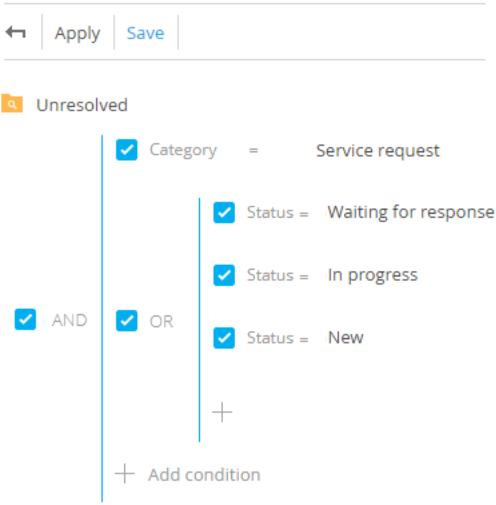
The [Portal Cases] section is available in the self-service portal by default.

2. In the [Filter] menu, select the [Show folders] option.
3. Click the [Add folder] button.
4. Enter the folder name and click [OK] in the opened window.
5. Set the following filter conditions: “Case category = Service request”:
    a. Click <Add condition>.
    b. In the opened window, select the “Case category” column.
    c. In the filter setup area, click <?>. In the opened window, select the needed value for the selected column, in this case “Service request”.
6. Add another condition: “Status=New; In progress; Waiting for response”.
7. Alternatively, you can add three separate conditions and group them using “OR” logical operator to group cases in one of the mentioned statuses:
    a. Holding down the CTRL key, select the filter conditions to group.
    b. From the [Actions] menu, select the [Group] option. As a result, the selected conditions will be combined in a separate group with the corresponding operator.

c. Set "OR" as the logical operator for the newly created group by clicking the operator name.

8. Click the [Save] button (Fig. 26).

**Fig. 26** Saving a folder filter




## NOTE

Use the advanced filter mode to set up filters. More information about Creatio advanced filter mode is available in the Advanced filter article.

# HOW TO FILTER RECORDS ON THE PORTAL

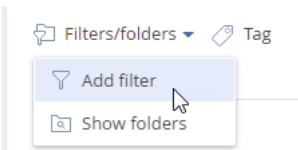
Use filters to search records in section lists.

## NOTE

More detailed information on filters is available in the Filters article.

To set up filtering conditions for the list records, use the [Add filter] command in the [Filters/folders] menu (Fig. 27).

**Fig. 27** Adding filter




## CASE

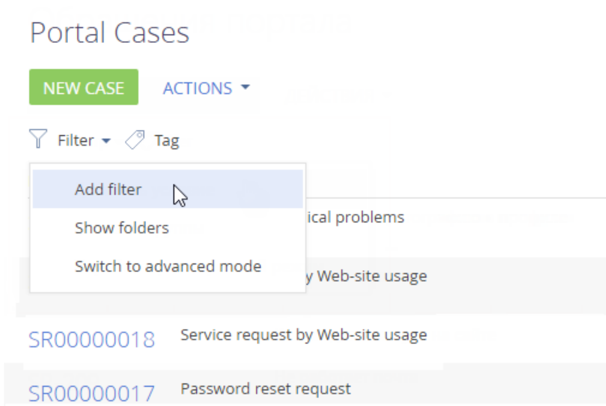
In the [Portal cases] section, find the case by its number.

1. Go the [Portal Cases] section.

   NOTE
   The [Portal Cases] section is available in the self-service portal by default.

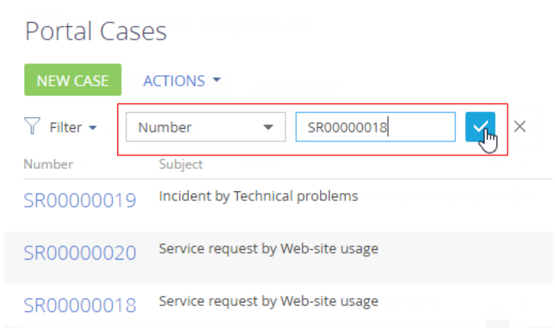
2. In the [Filters/folders] menu, select the [Add filter] option (Fig. 28).

   **Fig. 28** A standard filter in the [Portal Cases] section



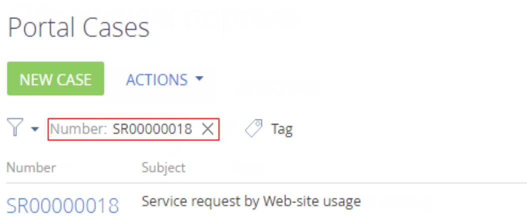

3. To search a case by its number, select the [Number] field from the list, enter the case number and click ✓ (Fig. 29).

   **Fig. 29** Search for a case by number




Then, the page will display only the records that match the configured filter (Fig. 30). To disable a previously configured filter, click the × button.

**Fig. 30** A standard filter applied to the [Portal Cases] section




## HOW TO TAG RECORDS ON THE PORTAL

To quickly search for information by keywords, you can assign a tag or a set of tags to any record on the portal.

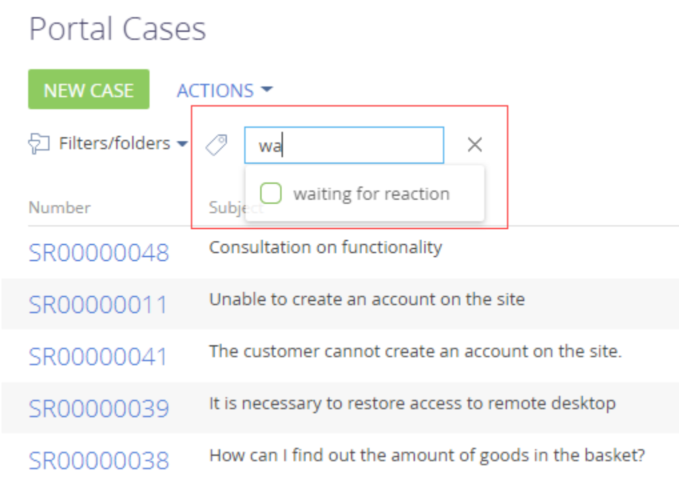
For example, in the [Portal Cases] section, you can tag cases waiting for reaction and filter them by the assigned tag.

### NOTE

The [Portal Cases] section is available in the self-service portal by default.

Records are tagged manually. To create a tag and then tag a case, go to the record page and click . To filter records in the section by tags, use the filtering area (Fig. 31).

**Fig. 31** Tag filter in the [Portal Cases] section




### NOTE

For more details on how to use filters, please see the Tags article.

## SEE ALSO

- Portal registration and login
- Working with the portal knowledge base
- Working with the portal Cases