



Signature Customer Portal Guide

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Introduction

Signature Customer Portal is a web-based application that is used with Signature Service Management. Customer Portal lets your customers view service information that is specific to their locations, online and in real-time. This service information comes from the same database that is used by your service department and includes the details of outstanding and historical service calls, and also equipment and maintenance contract information.

You can let your customers initiate a new service call by entering information through Customer Portal instead of calling your organization. This gives customers access to your service department seven days a week, 24 hours a day. Customer Portal also lets your customers view information about your organization, such as upcoming training programs, special promotions, support guidelines, and other topics your organization provides.

Installing Customer Portal

This section provides information to help you install the Customer Portal. We recommend that you run all installations in administrator mode and that you install the Customer Portal applications in the following order:

- [Install the Signature Portal Web Service \(page 3\)](#)
- [Install the Customer Portal Website Application \(page 3\)](#)
- [Install the SMS Integration Application \(page 3\)](#)
- [Install the Signature Portal Security application \(page 4\)](#)
- [Verify the Application Pool Settings \(page 4\)](#)

After you install the applications, complete the steps in [Verify the Application Pool Settings \(page 4\)](#).

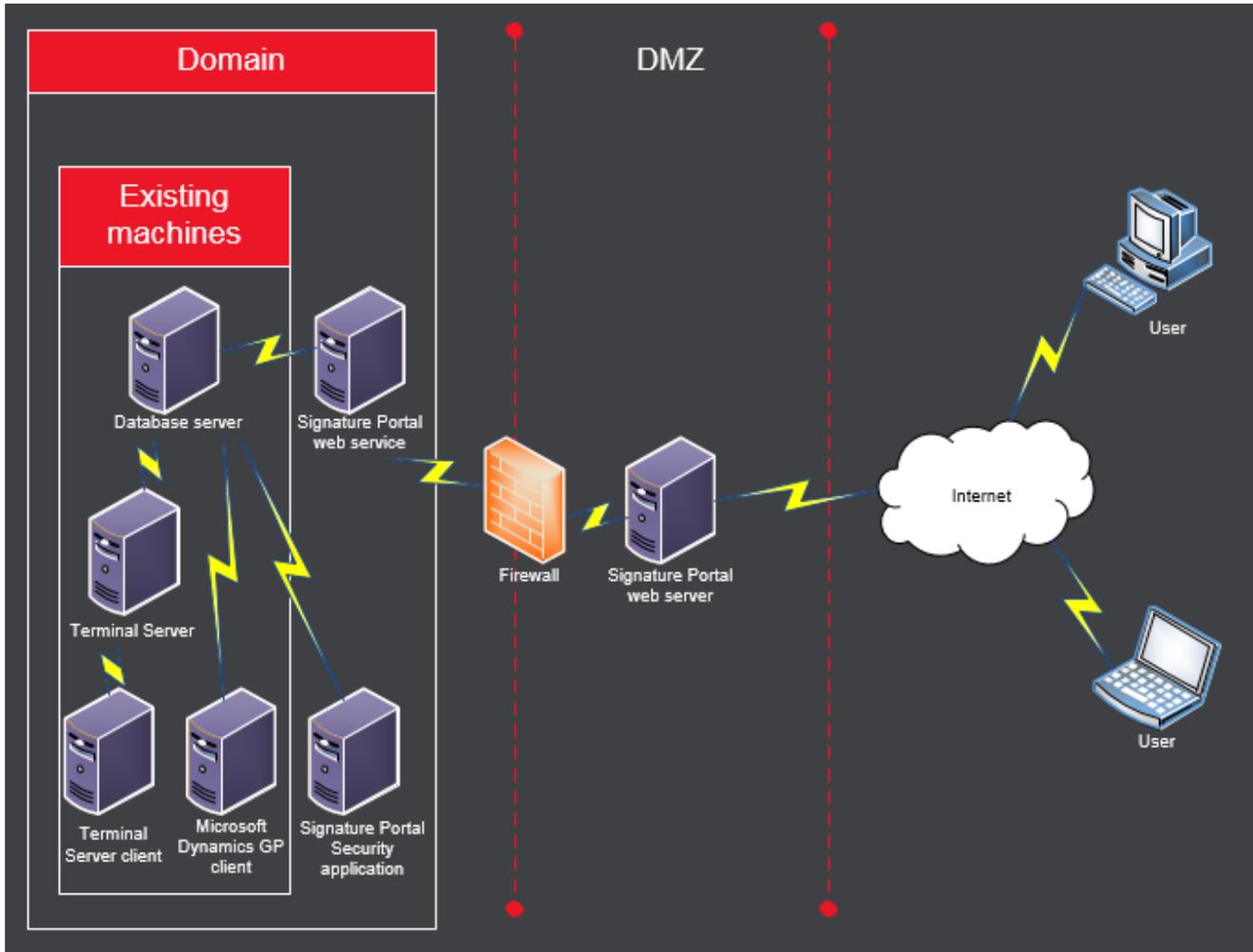
System Requirements

To find a complete list of system requirements across all the Signature modules, please refer to the Signature System Requirements document found on the Product Download page on Signature Resources at <https://www.wennsoft.com/wsportal/product-downloads>.

Computer Network Setup

We recommend that you install the Signature Portal Security application and Signature Portal web service on a machine that resides within the boundaries of your organization's firewall, preferably on your organization's domain.

This diagram illustrates a recommended setup.



Install the Signature Portal Web Service

As illustrated in [Computer Network Setup \(page 2\)](#), the way your system is set up plays a large role in the level of security that is provided when you use Signature portals. Signature portals use the built-in security features of Integrated Windows Authentication.

The Signature Portal web service requires the PortalUser user account to enable access to the SQL server. This user must have system administration rights in order to set up security and perform other tasks.

1. Double-click **PortalWebService-16-0-01-05.exe**.
2. On the Welcome to the Signature Portal Web Service Setup Wizard page, select *Next*.
3. On the End-User License Agreement page, review and accept the terms of the license agreement.
4. Select *Next*.
5. On the Data Source Configuration page,
6. Enter the server name, the company database, and the password for the sa user.
7. Select *Next*.
8. On the Web Service Configuration page,
9. Enter a password for the PortalUser user.
10. Select *Next*.
11. On the Select Installation Folder page, accept the default installation location or select *Browse* to select the folder where the Signature Portal web service will be installed.
12. Select *Next*.
13. On the Ready to Install page, select *Install*.
14. When the installation is finished, select *Finish*.

Install the Customer Portal Website Application

1. Double-click **PortalWebSiteCustomer-16-0-1-01.exe**.
2. On the Welcome to the Signature Portal Web Site - Customer Setup Wizard page, select *Next*.
3. On the End-User License Agreement page, review and accept the terms of the license agreement.
4. Select *Next*.
5. On the Data Source Configuration page, enter the server name, the company database, and the password for the sa user.
6. Select *Next*.
7. On the Web Service Configuration page, enter the address of the Signature Portal web service.
8. Select *Next*.
9. On the Select Installation Folder page, accept the default installation location, or select *Browse* to select the folder where the Customer Portal website application will be installed.
10. Select *Next*.
11. On the Ready to Install page, select *Install*.
12. When the installation is finished, select *Finish*.

Install the SMS Integration Application

1. Double-click **PortalSMSIntegration-18-2-1.exe**.
2. On the Welcome to the Portal SMS Integration Setup Wizard page, select *Next*.
3. On the End-User License Agreement page, review and accept the terms of the license agreement.
4. Select *Next*.
5. On the Select Installation Folder page, accept the default installation location or select *Browse* to select the folder where the SMS Integration will be installed. This should be the Microsoft Dynamics GP installation folder.

6. Select *Next*.
7. On the Ready to Install page, select *Install*.
8. When the installation is finished, select *Finish*.

Install the Signature Portal Security application

1. Double-click **PortalSecuritySetup-16-0-01-08.exe**.
2. On the Welcome to the Signature Portal Security Setup Wizard page, select *Next*.
3. On the End-User License Agreement page, review and accept the terms of the license agreement.
4. Select *Next*.
5. On the Data Source Configuration page,
 6. Enter the server name and the company database.
 7. Mark **Create Objects** and enter the password for the sa user.
8. Select *Next*.
9. On the Select Installation Folder page, accept the default installation location, or select *Browse* to select the folder where the Signature Portal Security application will be installed.
10. Select *Next*.
11. On the Ready to Install page, select *Install*.
12. When the installation is finished, select *Finish*.

Verify the Application Pool Settings

Depending on the version of .NET Framework that you use, you might encounter configuration errors when you try to open Customer Portal. To avoid this error, you need to verify that the application pool will use ASP.NET v4.0.

1. Select *Start > Administrative Tools > Internet Information Services (IIS) Manager*.
2. On the Internet Information Services (IIS) Manager console, in the left pane, expand your server name, and then expand the *Sites* node.
3. Find and right-click the *CustomerPortal* site. Select *Manage Application > Advanced Settings*.
4. On the Advanced Settings window, select the **Application Pool** lookup icon.
5. On the Selected Application Pool window, in the Application pool field, select **ASP.NET v4.0**.
6. Select *OK*.
7. In the Advanced Settings window, select *OK*.

Setting up Security for Portal Users

The Signature Portal Security application lets you define security access for the information that's displayed on portal pages. Setting up this security is a multistep process that involves both Signature Portal Security and various setup windows in Service Management.

Signature Portal Security Overview

This section contains general information and tips about Signature Portal Security.

- The objects (and meta) need to be created only once per company, but they can be run additional times without destroying any data.
- Installation of SQL objects is transactional; if the install fails, all objects are removed.
- ODBC isn't used. When you're prompted for server names, enter the actual server name, not an ODBC name.

- Signature Portal Security uses Integrated Windows Authentication. You can change this in the **PortalSecurity.exe.config** file.
- Signature Portal Security can support multiple companies. You can select different companies or add companies as needed.
- Signature Portal Security contains all the SQL objects. You can add new companies without installation media.
- When you set up security for the portals, grant permissions before you load a visual template.
- Visual templates rely on data permissions and won't load correctly if the data permissions aren't set.
- The assignment of the SQL user needs to be set to none for all companies before a user can be deleted.
- Signature Portal Security application errors are sent to Windows Event Viewer (WennSoft).

Before You Set up Security

Before you set up security for portal pages, consider the number of groups that you'll need and the data that you'll want the members of each group to have access to. For example, supervising contacts or users might need to be able to view more pages and information than other contacts or users. You can even name your groups to reflect roles.

Contacts are assigned to security groups in Service Management, along with the sign-in name and password for accessing the Customer Portal pages. As you determine your groups, we recommend that you open the Customer Portal website application to see which data and display options are available.

In addition, as you set up security and access parameters, you can preview the resulting pages in the Signature Portal Security application.

- [Data Settings \(page 5\)](#)
- [Visual Display Settings \(page 5\)](#)
- [Permission Types \(page 5\)](#)

Data Settings

Areas in Service Management are represented by data objects. For example, there is a CallTask object for service call tasks, a CallAppointment object for service appointments, and so on. In Signature Portal Security, you assign access to these data objects by security group, contact, or both.

 Some data objects that are displayed in Signature Portal Security aren't currently supported.

Visual Display Settings

Portal pages and panes represent what is displayed on the portal website pages. In Signature Portal Security, you assign access to these pages and their panes by security group. Each combination of web page and pane contains a list of properties that you can set permissions for.

Permission Types

For each data object, you can set one of these permissions:

- **Create** (create new object)
- **Read** (view object)
- **Update** (change object values)

Some permissions affect others. For example, if the **Read** permission isn't set, the **Update** permission can't be set.

For each web page or pane property, you can set permissions to display (or not display), and you can indicate whether that property value is required.

⚠ Although it's displayed in Signature Portal Security, the **Delete** permission type isn't supported with this version of Signature portals. Users can't delete records from the website.

Open the Signature Portal Security Application

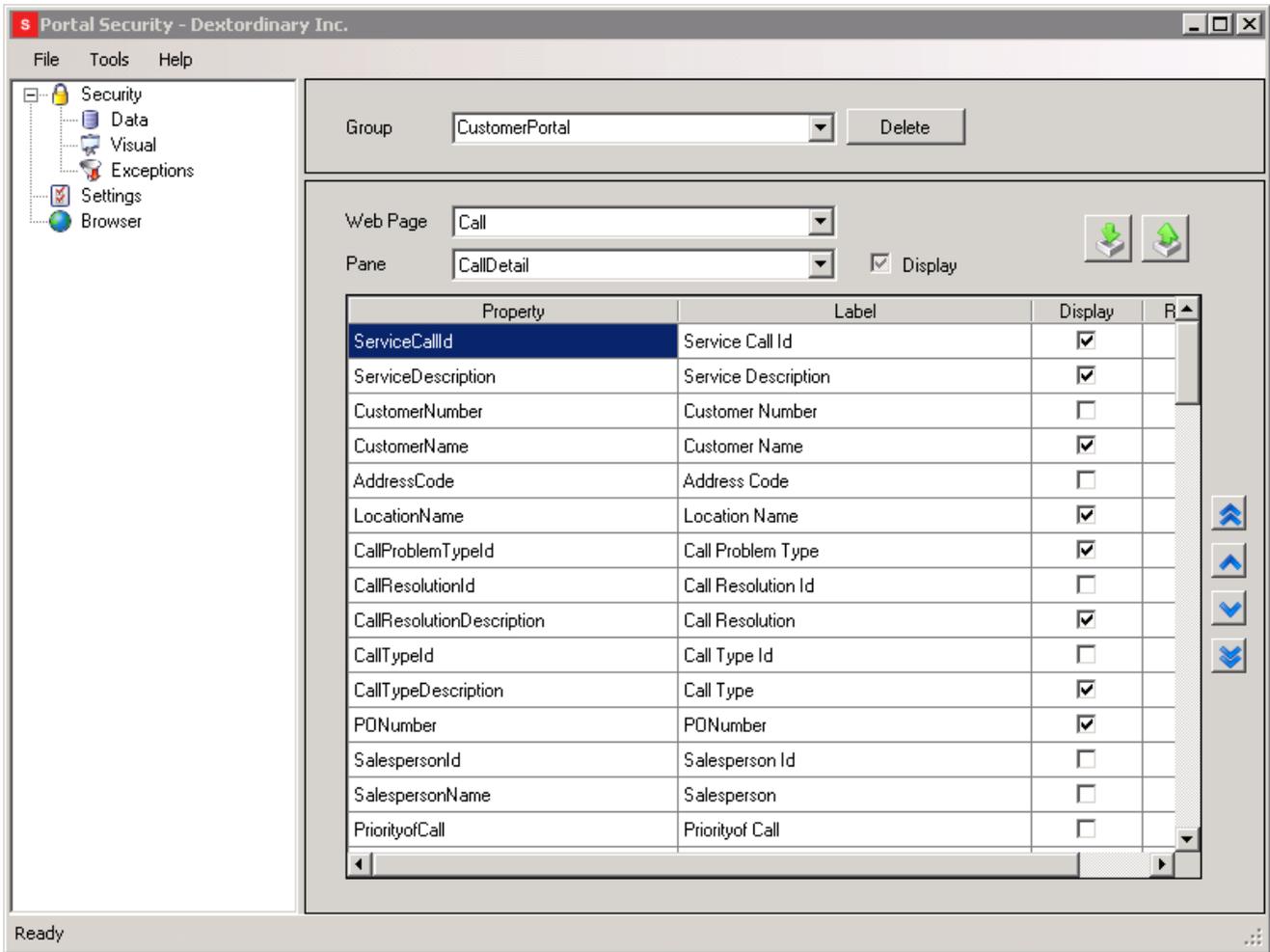
1. Select *Start > All Programs > Signature > Portal Security > Signature PortalSecurity*.
2. On the Portal Security window, select the product. Only the products that you've purchased or registered appear in the list.

Navigate Signature Portal Security

Signature Portal Security uses a tree view design, which lets you select items in the left navigation pane and view them in the right display pane. When you select an item in the tree view, the right pane displays the selected content. For example, it might display the content for *Data > objects* or *Visual > web pages/panes*.

The fields in the display pane are empty until you create a security group and set up permissions for the properties of an object.

The following illustration contains a group that has already been created and its associated properties for a sample data object.



These items are available in the tree view (the left navigation pane).

Item	Used to
Security > Data	Set permissions for access to data objects for each security group.
Security > Visual	Determine which properties to display on the portal pages for each security group.
Security > Exceptions	For specific users, set exceptions to the permissions that are assigned to the security group.
Settings	Capture customer page sign-in attempts that were successful or unsuccessful.
Browser	View portal pages directly from within Signature Portal Security. The pages open in the display area.

Set up Users and Permissions

You must create security groups and assign permissions to those groups for access to Signature Portal pages.

You must complete the procedures in this order:

- [Create Security Groups \(page 8\)](#)
- [Set up a New User or Contact and Grant Access to Locations \(page 8\)](#)
- [Add Users to Security Groups \(page 10\)](#)
- [Assign Permissions to Data Objects \(page 10\)](#)
- [Allow Users to Recover Lost Passwords \(page 11\)](#)

Create Security Groups

You can set up as many security groups as you want. Before you start, you might want to make a note of which data objects will belong to which groups, and how you want to assign permissions to those groups.

1. In Signature Portal Security, in the tree view, select *Security > Data*.
2. Enter a name for the group and press the TAB key on your keyboard.
3. When you're prompted to create the group, select *Yes*.
4. Repeat steps 2 and 3 to add more groups, as necessary.

Set up a New User or Contact and Grant Access to Locations

To sign in to Customer Portal, a user must be set up as a contact in Service Management. The user must then be granted access to a location in Service Management in order to have access to that location in Customer Portal.

You can set up contacts as local or agency contacts:

- Local contacts – Users who need access to only one customer or location.
- Agency contacts – Users who need access to multiple customers or locations. If you don't set up these users as agency contacts, you'll need to set up multiple local contacts for the same user – one for each customer or location.

The order in which you perform the first two tasks in this section depends on whether you're adding an agency or local contact:

- **To set up an agency contact**, complete Set up the User as a Contact, followed by Grant a User Access to a Location below.
- **To set up a local contact**, complete only Grant a User Access to a Location below. Local contacts are set up when you assign a user access to a location.

Set up the User as a Contact

1. Select *Cards > Service Management > Contact Management*.
2. In the Service Contact Management window, you can search to see if the contact already exists.
3. To create a new contact, select the *New Contact* button on the toolbar to open the Contact Setup window. Any information that you entered in the previous window will default into the Contact Setup window.
4. Select the **Contact Type**:
 - **Agency**
Agency contacts can be assigned to any number of contracts or locations, for example, within a fire or police department.

- **Local**
Local contacts are specific to one location. If you are using Signature Customer Portal, this is where you set up your customers to use the portal. You can create a local contact from this window; however, keep in mind that you cannot attach a local contact to a location or maintenance contract from the Contact Setup window. We recommend that you create local contacts at the location and contract record levels.
5. Enter the following information:
 - **Contact Name**
Enter the contact name.
 - **Primary Telephone**
Enter the contact's primary telephone number.
 - **Phone Type**
Select the phone type. See *Labeling contact setup user-defined fields* in the Signature User Guide.
 - **Contact Organization**
Enter the contact organization.
 - **Address, City, State, ZIP Code**
Enter the address information.
 - **Default Role Type**
Select the role type from the lookup window.
 - **Email Address/PIN Number/Customer Portal Report Folder**
This provides login information and application data if this contact is a Customer Portal user.
 - **USER-DEFINED**
Enter any user-defined information.
 - **Quick Note**
Use the Quick Note window to enter notes and other information. Unlike attached notes created with the notepad button, a quick note is always visible in the Contact Setup window.
 6. Select *Save*.

Grant a User Access to a Location

When you assign a contact to a location, the date must fall within the effective and expiration dates of the group that the contact is assigned to. For more information on Contact Management, see *Using Contact Management* in the Service Management User Guide.

1. In Microsoft Dynamics GP, select *Cards > Service Management > Service Manager*.
2. On the Service Manager window, select the customer ID and location address ID to grant access to.
3. Select the **Location Address ID** zoom link.
4. On the Location window, select the *Contacts* button in the top navigation.
5. On the Location Contacts window, select *Attach Agency or Add Local*.
 - **If you're attaching an agency contact**, On the Agency Contacts window, select the contact and select *Select*. The agent contact is granted access to the location.
 - **If you're adding a local contact**, on the Location Contact Setup – Local window, continue on with step 6.
6. Enter the user's telephone number and select *Redisplay*.
 - **If you're assigning a contact that is already set up**, you'll receive a message stating that the phone number has been used. Select **Current** to select that contact.
 - **If you're assigning a new contact**, select the New Contact button in the top navigation. the Contact Phone Setup window opens, where you can add details for the phone number. When you select *Save*, the contact is assigned to the customer.
7. When you return to the Location Contact Setup - Local window, complete the contact record.
8. Select *Save*.

Mass Assign User Access

If a user is set up as an agency contact, and that contact needs access to multiple customer locations, contracts, or both, you can mass-assign access to a range of customer locations and contracts at one time.

To mass assign to locations

1. Select *Cards > Service Management > Contact Management*.
2. In the Service Contact Management window, search to find the existing contact.
3. Double-click the contact name in the results list or right-click and select *View Contact* to open the Contact Setup window.
4. In the Contact Setup window, select *Mass Assign*.
5. In the Mass Assign Contacts window, select *Locations* from the **Assign to** drop-down.
6. Use the **Customer** and **Location** filters as needed to narrow the display results and then select *Redisplay*.
7. The scrolling window displays the customer locations/contracts. If a location/contract already is marked, the contact is already assigned to that location/contract.
8. Use the *Mark All/Unmark All* buttons in the menu bar or individually mark/unmark the Assigned checkboxes.
9. Select *Process* to assign the contact to the marked locations or contracts or to unassign the contact if you've removed the checkmark.

Add Users to Security Groups

Before users can access information on Customer Portal pages, you must assign them to groups in Contact Management.

1. In Microsoft Dynamics GP, select *Cards > Service Management > Contact Management*.
2. On the Contact Setup window, in the **Telephone** field, select a contact.
3. Select the *Group* button.
4. On the Contact Group window, select the group to assign the contact to.
5. Select the effective and expiration dates.
6. Select *Add*. The group is added to the bottom of the window.
7. Select *OK*.
8. Repeat these steps for each contact to assign to a group.

Assign Permissions to Data Objects

For each portal data object, you can determine whether the members of a security group can view, create, and update information that is associated with that object.

You can assign permissions for the group as a whole (for example, all members of a group can view all properties for a data object) or you can assign permissions for individual properties of that object (for example, the **Customer Number** property of the **Customer** object).

1. In Signature Portal Security, in the tree view, select *Security > Data*.
2. Select the group to assign permissions for.
3. Select a data object. The properties that are associated with the object are displayed in the right pane.
4. For each object property, mark the appropriate checkboxes to set permissions.

You can also use the checkboxes next to the data object field to assign a permission level to all properties for the selected object.

These rules apply:

- To mark a property or object with **Update** permissions, that property or object must also have **Read** permissions.
- The **Create** permission applies only at the object level, not to individual properties for an object.

Allow Users to Recover Lost Passwords

To let users recover lost passwords in Customer Portal, follow these steps.

1. Make sure that Database Mail is set up on the portal server.
2. In Signature Portal Security, set the default profile to *Yes*.
3. In Microsoft SQL Server Management Studio, in the Object Explorer pane, select *Management > SQL Server Logs*.
4. Right-click *Database Mail* and select *Configure Database Mail*.
5. On the Welcome to Database Mail Configuration Wizard page, select *Next*.
6. On the Select Configuration Task page, select *Manage Database Mail accounts and profiles*.
7. Select *Next* and follow the instructions in the wizard.
8. Make sure that database mail is working by choosing *Send Test E-Mail*.
9. In the Object Explorer pane, select *Databases > System Databases > mdsb > Security > Users*.
10. Double-click *Guest*, and then mark **DatabaseMailUserRole** in both frames.
11. Select *OK* and close Microsoft SQL Server Management Studio.
12. Stop and restart the portal server.
13. In Microsoft SQL Server Management Studio, select *Databases > System Databases > mdsb > Security > Roles > Database Roles*.
14. Double-click *DatabaseMailUserRole*.
15. Make sure that **Guest** is listed under **Role members**.

Setting up Display Preferences

After you set up users and permissions, you need to determine what to display on the pages for a selected contact group.

You can start from scratch and select the data that you want to display, or you can load a predefined visual template as a starting point. You can change a template and save those changes as a new template. You can also copy an existing template, change it, and rename it.

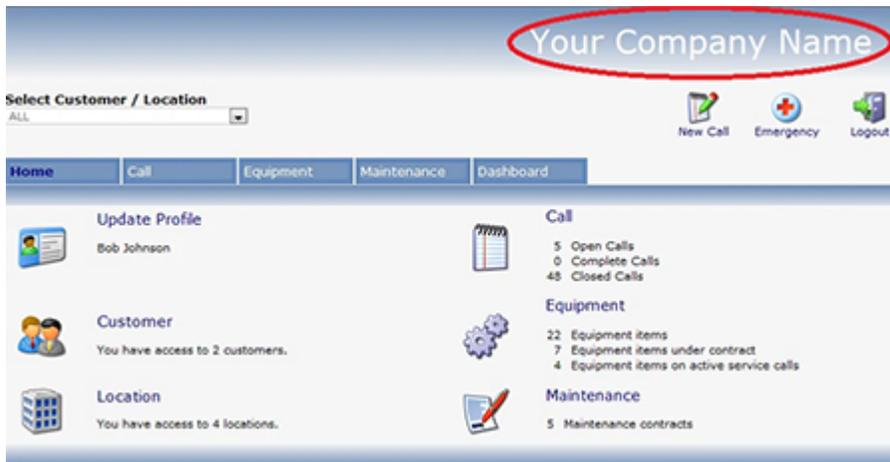
The predefined visual template, called **DefaultCustomerTemplate.xml**, contains basic information about service calls.

 If you have already set up information to display, loading a template overrides those initial settings.

Change the Organization Display Name

By default, **ACME Service** appears as the organization name in the upper-right corner of Customer Portal pages. You can change this header to display your organization's name or any other heading.

1. In the location where Customer Portal is installed, such as *C:/Program Files/Signature/Portal Web Site - Customer*, find the **PortalResource.xml** file in the **Configs** folder.
2. Open **PortalResource.xml** with a text editor, such as Notepad or Wordpad.
3. Find this text: `<add key="BannerLogo" value="ACME Service"/>`.
4. Change *ACME Service* to the text that you want to display. For example, to display the result below, the edited text would read: `<add key="BannerLogo" value="Your Company Name"/>`.



5. Save and close the file. The new text is displayed in the header of the Customer Portal pages.

Load a Predefined Visual Template

1. In Signature Portal Security, in the tree view, select *Security > Visual*.
2. Select a group.
3. Select the **Load Visual Template**  icon. A message is displayed, telling you that if you load a template, you'll lose any visual settings that were already chosen for this group.
4. Select *Yes* to proceed.
5. On the Select Visual Template window, open the **Templates** folder.
6. Select a template or make a copy of a template and rename it so you can change it.
7. Select *Open*. It might take a few minutes for the template to load.
8. When processing is complete, you'll receive a message that the template was loaded successfully.
9. Select *OK*.

Manually Select Visual Settings

If you aren't using a visual template, or if you already loaded a template and you want to make more changes to the visual settings, use these instructions to set up the pages and panes that are displayed for a group.

When you select visual settings, note that some web pages and panes are dependent on others. For example, to display service call details (the Call page), you must also display the list of service calls (the CallList page).

1. In Signature Portal Security, in the tree view, select *Security > Visual*.
2. Select a web page and a pane. Each web page contains at least one corresponding pane. The properties that are associated with the selected web page and pane are displayed.
3. For each property, set these display options:
 - **To display a data property for members of the selected group**, mark **Display**. To display all properties for this web page and pane, mark **Display** next to the **Pane** field.
 - **To require that a user manipulate data in some way**, mark **Required** for the property. It's useful to set a property as required if the corresponding field in Service Management is also required. Optional fields or properties shouldn't be marked as required. If a property is required, the group must also have **Update** permissions for the corresponding data object property (*Security > Data*).
4. To view the changes immediately, select *Browser* in the tree view to open the portal site.

Save Changes to a Template

If you customized a basic template or you want to save your visual settings, follow these steps to create a template.

1. In Signature Portal Security, in the tree view, select *Security > Visual*.
2. Select a group to display the visual settings for that group.
3. Select the **Save Visual Template**  icon.
4. Browse to the folder where the template will be saved. We recommend that you save the template to the *Templates* subfolder.
5. Enter a name for the template.
6. Select *Save*.

Set up Reports

Customer Portal users can create a custom portal page for viewing Service Management reports. For each company that uses Customer Portal, each user has a local folder where images of reports can be stored, and a link appears on the Reports page for each file in this folder.

You can save reports in any format your browser recognizes, such as .pdf, .jpg, or .xlxs.

Follow these steps to enable the use of report images in Customer Portal.

1. In Microsoft Dynamics GP, select *Cards > Service Management Series > Contact Management*.
2. On the Contact Setup window, in the **Telephone** field, select a contact.
3. In the **Customer Portal Report Folder** field, enter the root directory of IIS as the location where reports will be stored on this user's machine. This is the virtual directory where the user's Customer Portal application is installed.

The path that you specify can't be a physical path to this location; it must be a relative path. For example, If the user's virtual directory is *C:/inetpub/wwwroot* and the user-created a folder for storing report images in *C:/inetpub/wwwroot/Reports/Company Name/Employee Name*, you would enter */Reports/Company Name/Employee Name* as the relative path for the Customer Portal report folder.

The folder names at this level can include spaces.

 These instructions ensure that this setup works with multiple companies. Also, don't use the */Reports* path if you have Microsoft SQL Server Reporting Services installed to the default SQL instance using this default path.

4. Select *Save*.

The Reports page in Customer Portal links to the specified folder for the user. Any report that is placed in that folder is accessible from Customer Portal.

 If you use SQL reports in Service Management, the user can create a subscription in Report Manager for each report that is displayed in Customer Portal. Report images are automatically rendered based on a schedule, and those images are delivered to a designated folder. A subscription ensures that report information is always up to date. See the SSRS documentation for more information.

Setting up Optional Preferences

Additional setup procedures enhance the security and use of Signature Portal pages.

Create an Exception List

You can exclude certain contacts from viewing, creating, and updating specific data objects. For example, you might want contact A to access equipment information, but not customer information. You can create an exception to override the group permissions that are set up for that contact.

This exception list applies to all security groups that are created by using Signature Portal Security.

1. In Signature Portal Security, in the tree view, select *Security > Exceptions*.
2. Select the contact, customer, and location to create an exception.
3. Select a data object that this exception applies to.
4. Mark or unmark the appropriate checkboxes to keep or remove a particular permission level for the selected data object for this contact. Leave all checkboxes unmarked if you don't want the contact to have any access to the data object.
5. Create additional exceptions, as needed.

Create a Link to the Signature Portal Site

You can view the results of your security and visual settings immediately by creating a link to the Signature Portal site from within Signature Portal Security.

1. In Signature Portal Security, select *Tools > Portal URL*.
2. On the Portal URL window, enter the URL of the portal site and select *OK*.
3. To test the link, in the tree structure, select *Browser* and sign in. The site opens in Signature Portal Security.

Change the Microsoft Dynamics GP Company

If you have multiple companies, you might want to create groups and web pages for each company. You first must select the company so the system knows which company the settings apply to. This company was selected during installation.

1. In Signature Portal Security, select *Tools > Change Company*.
2. On the Change Company window, select the company.
3. Select *OK*.

Add a Microsoft Dynamics GP Company

If a Microsoft Dynamics GP company was added after Signature Portal Security was installed, you can add that company to Signature Portal Security. This provides the data that is needed to work with a new instance of the portal.

1. In Signature Portal Security, select *Tools > Add Company*.
2. On the Add Company window, enter the name of the company exactly as it appears in Microsoft Dynamics GP.
3. Select *OK*. Only companies that weren't already set up appear as available companies to add.

Keep a Log of Sign-in Attempts for the Website

You can set up the system to track sign-in attempts to Signature Portal websites. These sign-in attempts create a file in the event log, which you can view by using Event Viewer in Windows Control Panel.

1. In Signature Portal Security, in the tree view, select *Settings*.
2. Mark **Audit Login Attempts**.

Set a Call History Limit

You can set the number of days to display service calls for in the CallList grid on Customer Portal pages.

1. In Signature Portal Security, in the tree view, select *Settings*.
2. Set the **Customer Portal - Call History Limit (Days)** setting by using the arrows.
For example, if you select **30** days, only service calls within the last 30 days are displayed on portal pages.

Getting Started with Customer Portal

Use this information to learn how to sign in to Customer Portal and to familiarize yourself with the navigation on Customer Portal pages.

Sign into Customer Portal

After you sign in, you can access the pages and objects that you have permissions for in Customer Portal. If the system is idle for 20 minutes, your session expires and you'll need to sign in again. For help with sign-in issues, see [Troubleshooting \(page 19\)](#).

1. Use the URL for Customer Portal to access the login page.
2. Enter your user name and password. This is the email address and PIN number that were entered when you were set up as a contact in Service Management.
3. In the **Start In** field, select the first page that you want to see when you sign in.
4. Select *Login*.

Navigation

Tabs

You navigate through the pages of Customer Portal by using the tabs at the top of the page.



Action icons

Use these icons to perform specific actions.

Icon	Description
	<p>New Call Create service calls. This icon is displayed only if you can create service calls.</p>
	<p>Emergency Open a page for emergency contact procedures and phone numbers. Customer Portal is used for general company-customer communication, but the contact information that's provided on this page allows for emergency contact at any time.</p>
	<p>Login/Logout Sign in to or out of the system. When you first access Customer Portal, you'll see the Login icon on the home page. You can use this icon to sign in. The Logout icon then is displayed, which you can use to sign out of the system and return to the home page.</p>

Browser buttons

The buttons that are available in your browser vary, depending on which browser you use. The *Back*, *Forward*, and *Print* buttons are helpful when you move through Customer Portal pages.

Using Customer Portal Pages

After signing in to Customer Portal, any user can view the information on the home page. Depending on the user permissions that are set up for you, you can access the main portal pages directly from the home page. The tabs and **Logout** icon are available from any page after you navigate away from the home page. In addition, your organization name, logo, and location address appear at the top of the pages.

You can sort the list data on all main pages – except the home page – by column in ascending or descending order. To sort the data, select a column heading.

Optimize the Page Column Display

To view portal columns at their optimal width, we recommend that you set your browser resolution to 1024 x 768.

Use the Home Page

The home page contains company-specific information.

You can define up to eight areas on this page, and you can customize the graphics and text for your organization.

The graphics are 40 x 40 pixel .gif files.

For more information about the home page, see [Navigation \(page 15\)](#).

Use the Service Call Pages

The Call page lists the service calls for the customer location. You can display maintenance contract calls in addition to service calls by marking **Include Maintenance**. You can also filter the information on this page by using the **Show** list to view all calls, open calls, or historical calls. The fields on the Call pages are a subset of the fields on the Service Management Series Dispatch Board.

- [View Call Details \(page 17\)](#)
- [Attach a Document to a Service Call \(page 17\)](#)
- [Create a Service Call \(page 17\)](#)

View Call Details

1. On the Calls page, select the lookup icon for a service call ID.
2. On the Call Details page, view detailed information, such as appointments and tasks, for the selected service call.
3. To view detailed information about the appointments or tasks for the service call, select *Call > Appointment* or *Task*.
4. On the Appointments or Tasks page, use the other options in the Call menu to view additional information. Depending on the permissions that are set up for you, you can view service call, appointment, task, and cost details for the selected service call. You also can view any timestamps, attachments, and notes that are associated with the service call.

Attach a Document to a Service Call

1. On the Calls page, select the lookup icon for a service call ID.
2. On the Call Details page, select *Call > Attachment*.
3. On the Attachment page, select *Browse* to locate and select an attachment.
4. Optional: Enter a description for the attachment.
5. Select *Add*. The attachment appears in the list of attachments for the selected service call.

Create a Service Call

You can use the **New Call** icon to create a service call that can be viewed by the service company's dispatcher. This icon is available only if you're set up to create service calls.

1. Select the **New Call** icon.
2. On the New Call page, select the information to create the service call for.
3. Select *Submit*.
4. A message informs you when the call is created successfully, and the new service call ID is displayed. A service appointment is created for the default technician for the location. If no default technician is assigned to the location, the technician is listed as **Unassigned**.
5. You can select the lookup icon for the service call ID or use the Call menu to open the Call Details page, which displays details about the service call. For more information, see [View call details \(page 0\)](#).

Use the Equipment Pages

The Equipment page lists the equipment for a customer location. The fields on these pages are a subset of the fields in the Equipment window in Service Management.

View Equipment Details

1. On the Equipment page, select the lookup icon for an equipment ID.
2. On the Equipment Detail page, view detailed information, such as the equipment type, serial number, and warranty information.
3. To view additional information for the equipment record, use the options in the **Equipment** menu to select a page.
4. Depending on the permissions that are set up for you, you can view equipment details and any meter readings, call history, attachments, and notes that are associated with the equipment record.

Attach a Document to an Equipment Record

1. On the Equipment page, select the lookup icon for an equipment ID.
2. On the Equipment Detail page, select *Equipment > Attachment*.
3. On the Attachment page, select *Browse* to locate and select an attachment.
4. Optional: Enter a description for the attachment.
5. Select *Add*. The attachment appears in the list of attachments for the selected equipment record.

Use the Maintenance Pages

The Maintenance page displays all maintenance contracts at a location, and a description of each contract and its start and end dates. The fields on the Maintenance pages are a subset of the fields in the Maintenance Contract window in Service Management.

View Maintenance Contract Details

1. On the Maintenance page, select the lookup icon for a contract ID.
2. On the Maintenance Detail page, view detailed information for the selected maintenance contract.
3. You also can use the other options in the Maintenance menu to view additional information. Depending on the permissions that are set up for you, you can view contract details and call history for the selected maintenance contract. You can also view any attachments and notes that are associated with the contract.

Attach a Document to a Maintenance Contract

1. On the Maintenance page, select the lookup icon for a contract ID.
2. On the Maintenance Detail page, select *Maintenance > Attachment*.
3. On the Attachment page, select *Browse* to locate and select an attachment.
4. Optional: Enter a description for the attachment.
5. Select *Add*. The attachment appears in the list of attachments for the selected maintenance contract.

Use the Reports Page

The reports page displays a list of reports that you can view by using the Customer Portal.

Select a link to view a report.

The reports that are listed on this page come from the Customer Portal Reports folder that is set up in Contact Management. This should be the IIS root directory on your machine, where the Customer Portal application is installed. Contact your host company to help identify the folder that was set up for you. You can also open the Reports page when the folder is empty to see the location.

Any images that you put in the specified folder are listed on this page. You can save reports in any format that your browser recognizes, such as .pdf, .jpg, or .xlxs.

To remove a report from the Customer Portal, remove the file from this folder.

 To make sure that the information on these reports is always up to date, if you use SQL reports in Service Management, you can create a subscription in Report Manager for the reports that you want to view through Customer Portal. A report image is automatically generated in the format of your choice, and the output is sent to a designated location, based on a schedule. For more information, see the SSRS documentation.

Use the Dashboard Page

The Dashboard page, which is accessible from the Dashboard tab, displays service key performance indicators (KPIs) and metrics for quick reference. You can click on the KPI summary to display the details.

The following metrics are available on the dashboard.

- **Calls By Location**
This KPI displays the number of calls for each location.
- **Equipment Call Volume**
This KPI displays the number of calls for each equipment ID.
- **Contracts Due**
This KPI displays the number of calls for each contract.

Troubleshooting

This section includes troubleshooting information to help you solve common issues.

Recover a Lost Password

1. At the bottom of the login page, select *I've lost my password*.
2. On the next page, enter your sign-in email address and select *Submit*.
3. A new, temporary password will be sent to the email address that's provided.
4. Use this temporary password to sign in to the Customer Portal.
5. From there, you can set up a new password. For more information, see [Change a Password \(page 20\)](#).

Change a Password

1. Sign in to the Customer Portal using your email address and current password.
2. On the home page, select *Update Profile*.
3. Enter your current password as the PIN number.
4. Enter your new password as the new PIN number and confirm it in the next field.
5. Select *Update*.
6. Your password will be changed, and you can sign in by using the new password.

Contact Information

Support

Phone: 262-317-3800

Email: support@wennsoft.com¹

Hours: Normal support hours are 7:00 a.m. to 6:00 p.m. Central Time. After-hours and weekend support is available for an additional charge. Please contact WennSoft Support for additional information.

WennSoft will be closed in observance of the following holidays: New Year's Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Veteran's Day, Thanksgiving Day, the day after Thanksgiving, Christmas Day, and the day after Christmas.

Support Plans

We're committed to providing the service you need to solve your problems and help your team maximize productivity.

We offer several Signature Enhancement and Support Plans to meet your needs and Extended Support Plans for retired product versions available at <https://www.wennsoft.com/wportal>².

Sales

Phone: 262-317-3700

Fax: 262-317-3701

WennSoft Headquarters

Address:

WennSoft

1970 S. Calhoun Rd.

New Berlin, WI 53151-1187

Phone: 262-821-4100 or 866-539-2228

Email: info@wennsoft.com³

Website: www.wennsoft.com⁴

Office hours: Monday through Friday from 8 a.m. to 5 p.m. Central Time.

¹ <mailto:support@wennsoft.com>

² <https://www.wennsoft.com/wportal/>

³ <mailto:info@wennsoft.com>

⁴ <http://www.wennsoft.com>
