

The Customer Spot

User Guide v1.8

For Use with *The Customer Spot* v1.1

Technology Advisors Inc.

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Table of Contents:

1. Introduction
2. Audience
3. Overview of *The Customer Spot*
4. Sugar CRM Integration
5. Guide for Customer Spot users

1. Introduction

The purpose of this guide is to describe the functionality and usage of *The Customer Spot*. *The Customer Spot* was designed as a support resource where companies and their customers can communicate, share knowledge and solve customer issues together. This guide will cover all of the components of *The Customer Spot* page as well as the relationship between *The Customer Spot* and Sugar CRM. This guide has been written for version 1.1 of *The Customer Spot*.

2. Audience

The guide is intended for Sugar CRM users and administrators as well as Customer Spot users. Section #4 will cover the integration and relationship between the portal and Sugar CRM and is intended for

Sugar users and administrators. Section #5 is intended for Customer Spot users. For the purpose of this guide, a Customer Spot user is someone who will be only using the portal and have no access to Sugar CRM.

3. Overview of The Customer Spot

The Customer Spot is divided in to a login / landing page and 5 main sections:

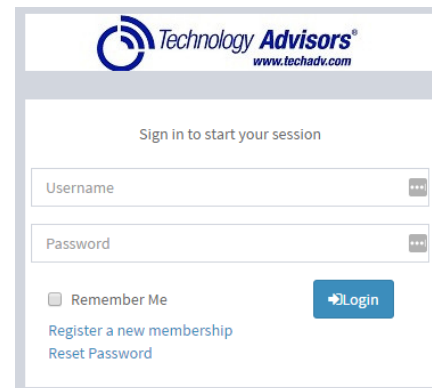
- i. Login Page
- ii. Home
- iii. Knowledge Base
- iv. FAQ
- v. Track Issues
- vi. Messages

We will look at each section individually:

i. Login Page

First time and returning users will be greeted by a login page upon visiting *The Customer Spot*. Here you will have the option of Logging in, registering for a new membership and resetting lost passwords. Access to the portal is controlled through Sugar CRM. Later sections with detail how new users are created and how to administer these users.

Once successfully logged in, you will be taken to the home page. In the top right, you will see your name with an option to click on yourself to either view your profile or sign out.



The screenshot shows the login interface for Technology Advisors. At the top, there is a logo with the text "Technology Advisors" and the website URL "www.techadv.com". Below the logo, the text "Sign in to start your session" is displayed. There are two input fields: "Username" and "Password", both with "..." icons on the right side. Below the password field, there is a checkbox labeled "Remember Me" and a blue "Login" button with a right-pointing arrow. At the bottom, there are two links: "Register a new membership" and "Reset Password".

ii. Home

The home screen is what you will see when you first log in to *The Customer Spot*. The information displayed on the home page corresponds with Messages marked as "Announcements" within Sugar

CRM. Section #4 will cover how administrators can enter information on this page. Below the announcements, the FAQ's are embedded on to the home page. Users can select how many records are displayed at once or browse by page.

iii. Knowledge Base

The Knowledge Base tab is used to store helpful Knowledge Base articles that are entered via Sugar CRM. Users have the option of viewing the articles in either Table or Tree view. Table view is selected by default and allows users to select how many records are displayed per page and also browse through available pages on the bottom right of the screen. If Tree View is selected, articles are arranged by category and expandable and collapsible sub-categories.

iv. FAQ

The FAQ section displays Frequently Asked Question articles which are populated through special Knowledge Base records within Sugar CRM. The FAQ page displays these articles in a table view and allows users to sort by Name, Total Views, Likes, Dislikes or Date Created. Users also have the option of searching for specific articles, changing how many records are displayed per page or navigating through the available pages.

v. Track Issues

The Track Issues page allows Customer Spot users to enter and track issues they may be experiencing. When an issue is entered it will automatically be assigned an Issue ID number and open a corresponding case within Sugar CRM. Issues will be sortable by Issue ID, Subject, Status, Priority, Created By, Date Created and Date Modified. Issues are grouped in to pages and Customer Spot users can select how many issues are displayed per page. Customer Spot users also have the option of searching for specific issues.

Once a specific issue is selected, Customer Spot users have the option of leaving Notes. When a note is entered by a portal user, a corresponding note is created within Sugar CRM.

vi. Messages

The Messages page displays messages that are entered using the Messages module within Sugar CRM. Messages are displayed in order of Date Created by default. Messages are grouped in to pages and are searchable by Customer Spot users. Users also have the option of displaying messages by Subject in alphabetical order and choosing how many records are displayed per page.

4. Sugar CRM Integration

In this section we will look at certain modules within Sugar CRM and see how they interact with *The Customer Spot*:

Sugar CRM Modules used by *The Customer Spot*:

- i. Leads
- ii. Contacts
- iii. Messages
- iv. Knowledge Base
- v. Cases
- vi. Notes
- vii. *The Customer Spot* Custom Modules
 - a. TCS Views
 - b. TCS Roles

i. Leads Module

The Customer Spot uses the leads module to process access requests and works with the Contacts Module to create new registrations.

When a portal user first navigates to *The Customer Spot*, they are greeted with a login screen and the option to register a new membership. Membership is actually controlled via the Contacts module, however, when a new user selects the “Register a new membership” option and submits their information, that data is entered as a lead within Sugar CRM. There is typically less than a 5-minute delay for a new registration to appear as a Lead within Sugar.

Once the lead is received within Sugar, it must be converted to a contact before access can be granted. When viewing the lead within Sugar, you can use the drop-down menu and select convert to begin the process. Most of the information will be filled in for you and it will attempt to match an account record based on what the user entered in the portal. Confirm that everything is correct, then click the “Save and Convert” button to proceed:

A new contact record will be automatically created, depending on your choices when converting the lead, a new Account or Opportunity record may be created as well. By default, new records from converted leads will be assigned to the user which performed the conversion.

ii. Contacts

The Contacts Module is used to store all Customer Spot users and manage their access restrictions.

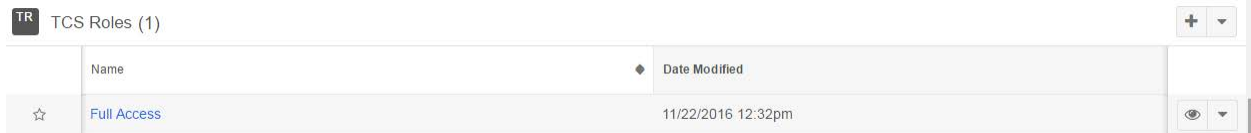
When a contact is created or lead is converted to a contact, the next step is to navigate to that contact record and mark for activation. Within the contact record view, by default, there is a panel labeled The Customer Spot. Under this panel, there are 3 options: a checkbox for The Customer Spot Active, a text field for The Customer Spot Name and a dropdown menu for The Customer Spot Access Type.

The Customer Spot Active check box should be used to activate new accounts. You will also need to enter a Customer Spot name that the user will use to login to *The Customer Spot*. The Customer Spot name MUST be set to match that users email address. Customer Spot access type can be used to restrict different types of users from viewing all material on *The Customer Spot*. By default, there are three generic access types: Type 1, Type 2 and Type 3. It is important to remember that these access types can be relabeled or customized according to your organization's needs. When creating material or articles for the portal, access types are used to determine which users will be able to view that material.

Once the Customer Spot active box is checked and a Customer Spot name is set, make sure and save the record near the top of the screen. The system will automatically send out an email to the contacts

provided email address letting them know their account is approved and providing a link for them to set a password. These automated emails are generally sent within 5 minutes.

After activating a contact for *The Customer Spot*, you will also need to assign the contact at least one TCS Role to set their access levels. In the TCS Roles subpanel, click the Link Existing Record option and select the appropriate TCS Role for the contact. Additional information about TCS Roles is available below in section vii.

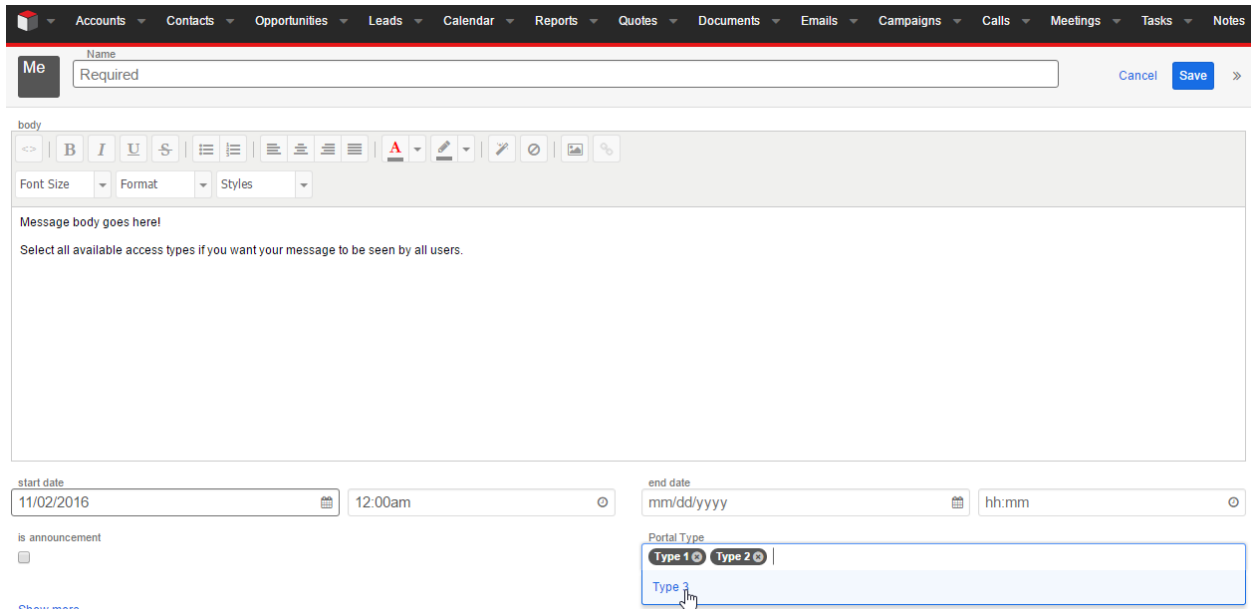


Name	Date Modified
Full Access	11/22/2016 12:32pm

iii. Messages

The Messages module is used to control the announcements on the home page of the portal as well as the messages on the Customer Spot’s messaging page.

When creating a new message, you must first assign a name for the message. Next, you create the body of your message. HTML and embedded images are supported. The start date field lets you set when the message will appear. The default value for the start date field is the current day, so if you do not change the value the message or announcement will appear on the next sync (usually less than 5 minutes). You also have an option of setting an expiration date for your message by altering the end date field.



Name: Required

body

Message body goes here!
Select all available access types if you want your message to be seen by all users.

start date: 11/02/2016 12:00am

end date: mn/dd/yyyy hh:mm

is announcement:

Portal Type: Type 1, Type 2, Type 3

If you want your message to appear on the home page instead of the messaging section, simply select the “is announcement” checkbox. If you would like to place restrictions on who can see your message or announcement, you can select Customer Spot access types via the dropdown menu. Only users with matching access types will be able to view these messages. Therefore, if you want your message to be

viewable by all users, you must select all available access types. Once you are finished creating the Message or Announcement, simply click on the save button.

iv. Knowledge Base

The Knowledge Base module within Sugar is used to control the Knowledge Base and FAQ sections within *The Customer Spot*.

To create a new Knowledge Base article on *The Customer Spot*, first navigate to the Knowledge Base module within sugar and select the option to create a new article. You must then assign a name to your article. Below the name field, there is a large text box to enter the body of your new article. The body field supports HTML as well as embedded images. Below the body section, you also have the option of including attachments. These attachments will be available as downloads on corresponding article within *The Customer Spot*.

Under the next panel (labeled The Customer Spot by default) there are options to set the Customer Spot access type as well as an “is FAQ” checkbox. The access type drop down can be used to set restrictions on who can view your article based on matching access types set at a contact level (All access types must be selected if you want all users to see your article or FAQ). The “is FAQ” checkbox, simply lets the portal know that this article should be posted on the FAQ section in addition to Knowledge Base on *The Customer Spot*.

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails Campaigns Calls Meetings Tasks Notes

KB Name Required Status Draft Cancel Save >

Business Card

Body Templates

<> B I U

Font Size Format Styles

Knowledge Base Article goes here.

Attachments

Tags

The Customer Spot

Is FAQ The Customer Spot Access Type

Is this an FAQ article?

The final panel also contains some very important fields for *The Customer Spot*. First, you can use the Category drop down list to categorize your article. When Customer Spot users are viewing the Knowledge Base page, they will have the option of viewing all articles as a table or tree view. Tree view groups articles together by category, so it is important to properly categorize all articles. Next, there is a checkbox marked “External Article”. This box must be checked for your article or FAQ to appear on *The Customer Spot*. Lastly, you will need to select a Publish Date. If you would like your article to appear immediately, select today’s date and it will appear within 5 minutes of being published.

The last step before your article or FAQ appears on *The Customer Spot* is to set the status to “Published” and save the record. Towards the top of the screen and to the right of where you assigned the article a name, there is a dropdown field for Status. This MUST be set to published for your article or FAQ to appear on the portal. You also have to option of leaving it as a draft which will save your work within Sugar, but not publish to *The Customer Spot*. Depending on your company’s policy, Knowledge Base articles may need to be approved before publication. Once you have set the appropriate status, simply click the save button.

v. Cases

The Cases module is used to create and manage the cases that appear within the Track Issues section on *The Customer Spot*. It is important to note that cases can originate from Sugar OR can be created by Customer Spot users directly on *The Customer Spot*!

When viewing the cases module list view within Sugar, you will notice that each case is automatically assigned a case number. If a portal user enters an issue directly from *The Customer Spot*, it will be assigned a sequential case number and automatically appear within the Cases module within Sugar.

To create a new case from Sugar, select the “Create Case” option and start by assigning your case a subject. You will notice you are not allowed to select a case number, just like cases created directly on the portal, these are handed out automatically in sequence and cannot be assigned manually. Next, you are able to set the case priority and are required to associate the case with an account. Cases created directly from the portal are automatically assigned the account associated with that portal user (this setting is controlled from Contacts within Sugar).

The screenshot shows a SugarCRM case record form. At the top, there is a navigation bar with various modules: Accounts, Contacts, Opportunities, Leads, Calendar, Reports, Quotes, Documents, Emails, Campaigns, Calls, Meetings, Tasks, and Notes. Below the navigation bar, there is a subject field with the text "Required" and a "Save" button. The form itself is divided into several sections: "Number" (No data), "Priority" (High), "Account Name" (Required), "Show in Portal" (checked), "Type" (Administration), "Source" (Select...), "Status" (New), and "Assigned to" (Tim Casey). There is also a "Description" text area at the bottom.

If you want your new case to appear on the portal, it is required to mark the box labeled “Show in Portal”. Below that, there are dropdowns for Type, Source, Status and an area to enter a description of the case. The Assigned to box defaults to the current user when created from Sugar but can be changed to any other Sugar user. Once you are satisfied with your new case, go ahead and click the save button near the top and allow up to 5 minutes for it to appear on *The Customer Spot*.

If you have a resolution or need to change the status on a portal user created case, locate that case within the Cases module and make any necessary changes. Once you have finished, save the record the same way you would a new case and those changes are reflected on the portal as well.

Notes, Meetings, Tasks, Calls and Emails can all be linked to a Case record and displayed with *The Customer Spot*. To make sure these activity type records are displayed in the portal, simply check the “Portal Viewable” box when saving these records. If you need to send a note or communicate with the user who opened the case on the portal, this can be done using the Notes module within Sugar.

vi. Notes

The Notes module is used for communication between Sugar users and Customer Spot users regarding open cases. The Notes module is also used to store attachments that are used on Knowledge Base records.

Much like cases, notes can be created from within Sugar or created directly on *The Customer Spot* by Customer Spot users. Notes created from the portal are automatically associated to the correct case and will automatically appear within the Notes module. Any attachments that are included with Knowledge Base records within Sugar will also have a matching note record automatically created.

The best way to create a note related to an existing case is actually through the Cases module. Navigate to the Cases module, find and select the appropriate case and scroll down until you see the Notes section within the related modules subpanels. Click the plus button on the right to start the new note.

	Subject	Last Modified	Date Created	Assigned User
☆	Sample Note Related To Existing Case	11/02/2016 02:48pm	11/02/2016 02:48pm	Tim Casey

You will be required to label any new note with a subject. Next, you will notice that the note is automatically associated with the case through the “Related To” field. If for some reason this section is blank, you will need to associate your note with the proper case record. For the note to appear on *The Customer Spot*, the note must be related to the corresponding case record. From there you can use the description text field to type the details of your note. Attachments are supported on notes and can also be used on notes entered directly from the portal. Lastly, make sure and check the box labeled “Display in Portal?” for the note to appear on *The Customer Spot*. When your note is complete, click the save button up top.

Subject
Required

Contact
Select Contact...

Related To
Case

Description

Teams
Global

Attachment
Choose File No file chosen

Assigned to
Tim Casey

Tags

Date Created
No data

Date Modified
No data

Display in Portal?

Please note that it is also possible to create notes directly from the Notes module within Sugar. Notes created in this manner need to manually be related to the appropriate case record to appear on *The Customer Spot*.

vii. *The Customer Spot* Custom Modules

The Customer Spot uses two custom modules within SugarCRM to control role and access levels within *The Customer Spot*: TCS Views and TCS Roles.

Both of these custom modules are included in *The Customer Spot* installation package and can be further customized to fit your individual needs.

a. TCS Views

The TCS Views module contains the different account access roles that can be applied to a Customer Spot user's account. By default, there are 13 different views available. Messages, Issues, FAQ and Knowledge Base all have corresponding List, Edit and View records. There is also a unique Admin TCS View:

TCS Views (13) Create »

Filter	Create	Search by name...					
Name	Assigned to	Date Modified	Date Created				
Admin		12/22/2016 11:14am	12/22/2016 11:14am				
Messages List		12/22/2016 11:14am	12/22/2016 11:14am				
Messages Edit		12/22/2016 11:14am	12/22/2016 11:14am				
Messages View		12/22/2016 11:14am	12/22/2016 11:14am				
Issues List		12/22/2016 11:14am	12/22/2016 11:14am				
Issues Edit		12/22/2016 11:14am	12/22/2016 11:14am				
Issues View		12/22/2016 11:14am	12/22/2016 11:14am				
FAQ List		12/22/2016 11:14am	12/22/2016 11:14am				
FAQ Edit		12/22/2016 11:14am	12/22/2016 11:14am				
FAQ View		12/22/2016 11:14am	12/22/2016 11:14am				
Knowledge Base List		12/22/2016 11:14am	12/22/2016 11:14am				
Knowledge Base Edit		12/22/2016 11:14am	12/22/2016 11:14am				
Knowledge Base View		12/22/2016 11:14am	12/22/2016 11:14am				

Sugar users should NOT create new TCS View records. It is highly recommended to use Sugar role-based security to restrict or hide the TCS Views module. *The Customer Spot* applies account restrictions by linking portal user Contact Records with TCS Roles within Sugar. The TCS Roles are built using the TCS View records. Here is a summary of what each TCS View provides:

Each section of *The Customer Spot* has a corresponding List, Edit and View record within Sugar CRM. The "List" view allows Customer Spot users to view the different pages on the portal. For example, if a user is assigned a role comprised of "Issues List" and "Messages List", that user will be able to view the list of cases and messages on *The Customer Spot* portal. In this example, the Knowledge Base and FAQ sections would not be visible to that user unless they were re-assigned the proper views.

The list view only allows the user to see the list of records within *The Customer Spot*. To actually view the details of a record, a user needs the proper "View" TCS view within their role. For example, if a user's role contains "Issues List" but NOT "Issues View", that user would be able to see a list of cases, but not able to open any specific cases and view the contents.

If a user needs to be able to edit or create new records on *The Customer Spot*, they need the proper "Edit" view assigned to their role. For example, "Issues Edit" is required to create new cases from the portal or add notes to any existing cases. Keep in mind, "Issues List" would also be required to create new cases, otherwise a user would have no way to access the Track Issues section within *The Customer Spot*.

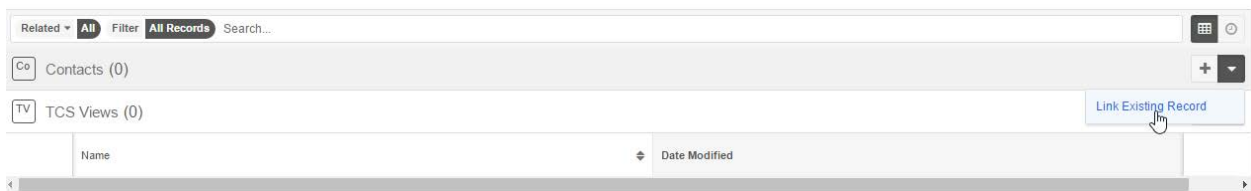
Lastly, there is a unique TCS View titled "Admin". This is a special view that can be used to designate admin users within *The Customer Spot*. Admin functionality is covered below in Section #5.

b. TCS Roles

TCS Roles are used in conjunction with TCS views to match the proper permissions to Customer Spot user records within Sugar CRM. The TCS Roles module does not include any pre-configured roles, instead administrators will need to setup the proper roles according to their own business needs.

TCS Role records used TCS Views to control access. TCS Views are linked to TCS Roles via their relationship within Sugar CRM. These TCS Roles are then linked to Contact records to match desired access levels with specific users.

TCS Roles can be assigned to users from either the TCS Role or Contact record. When viewing a TCS Role record, simply use the “Link Existing Record” functionality in the related Contact Subpanel to add users to that role. If viewing a Contact record, you can use the “Link Existing Record” functionality on the TCS Role subpanel:



It is important to remember that if a user is assigned multiple roles, the least restrictive permissions will prevail. When viewing a TCS Role record, the TCS view records that are linked to that role are displayed in the TCS Views Subpanel. Views can be linked or unlinked to TCS Roles from this subpanel to alter the functionality of this role. It is highly recommended that access to the TCS Roles module is restricted for most Sugar users. This can be accomplished using Sugar CRM’s built in role-based security functionality:

TCS Roles	Not Set	Not Set	None	None
TCS Views	Not Set	Not Set	None	None

To create new roles, simply create a new TCS Role record and link the proper TCS view records using the TCS Views subpanel. Remember that “List” views control access to the different sections within *The Customer Spot*, “View” records allow users to access specific articles or records on *The Customer Spot*, and “Edit” views allow users to create new records via *The Customer Spot*. The Admin view is a unique view that grants access to *The Customer Spot’s* Admin functionality.

Search and Add TCS Views (13) Cancel Add >>

Selected: (5)

Issues List Issues View Knowledge... Knowledge... Knowledge... Reset

Filter Create Search by name...

<input type="checkbox"/>	Name	Teams	Assigned to	Date Modified	
<input type="checkbox"/>	Admin	Global		12/22/2016 11:14am	
<input type="checkbox"/>	Messages List	Global		12/22/2016 11:14am	
<input type="checkbox"/>	Messages Edit	Global		12/22/2016 11:14am	
<input type="checkbox"/>	Messages View	Global		12/22/2016 11:14am	
<input checked="" type="checkbox"/>	Issues List	Global		12/22/2016 11:14am	
<input type="checkbox"/>	Issues Edit	Global		12/22/2016 11:14am	
<input checked="" type="checkbox"/>	Issues View	Global		12/22/2016 11:14am	
<input type="checkbox"/>	FAQ List	Global		12/22/2016 11:14am	
<input type="checkbox"/>	FAQ Edit	Global		12/22/2016 11:14am	
<input type="checkbox"/>	FAQ View	Global		12/22/2016 11:14am	
<input checked="" type="checkbox"/>	Knowledge Base List	Global		12/22/2016 11:14am	
<input checked="" type="checkbox"/>	Knowledge Base Edit	Global		12/22/2016 11:14am	
<input checked="" type="checkbox"/>	Knowledge Base View	Global		12/22/2016 11:14am	

Customer Spot users can be re-assigned and have their roles switched at any time. It typically takes less than 5 minutes for these changes to take effect.

5. Guide for Customer Spot users

This section will cover how to get started using *The Customer Spot*, how to navigate through the different pages and how to use each section. This information will be presented from the perspective on someone who has no access to Sugar and will be using *The Customer Spot* as a customer:

- i. Getting started with *The Customer Spot*
- ii. Navigation and how to use each section:
 - a. Home
 - b. Knowledge Base
 - c. FAQ
 - d. Track Issues
 - e. Messages
 - f. Admin

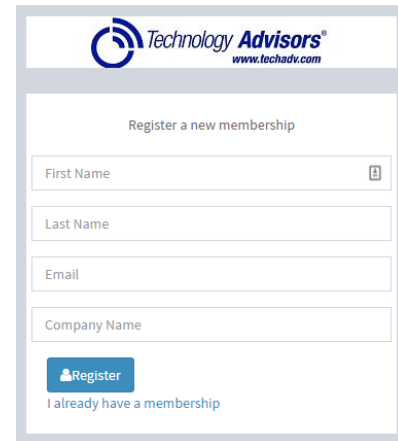
i. Getting Started with The Customer Spot

The first time you visit *The Customer Spot*, you will be greeted by a login screen. New users will be required to register for an account before proceeding by selecting the option to “Register a new membership”.

When registering for a new membership, you are required to enter a first name, last name, email address and your company name. Make sure a valid email address is used, as this will be required to set your password. Once everything is filled out, submit the application by clicking the “Register” button.

New accounts will need to be manually approved by an administrator. Because this is a manual process, there is no set timetable for how long account activation will take. Once your account is approved, you will automatically be emailed a link that will allow you to set a password.

Once your password is set, return to the original login screen and use your email address and new password as your credentials. There is an option to remember this information, as well as a Reset Password system if your password is ever misplaced.

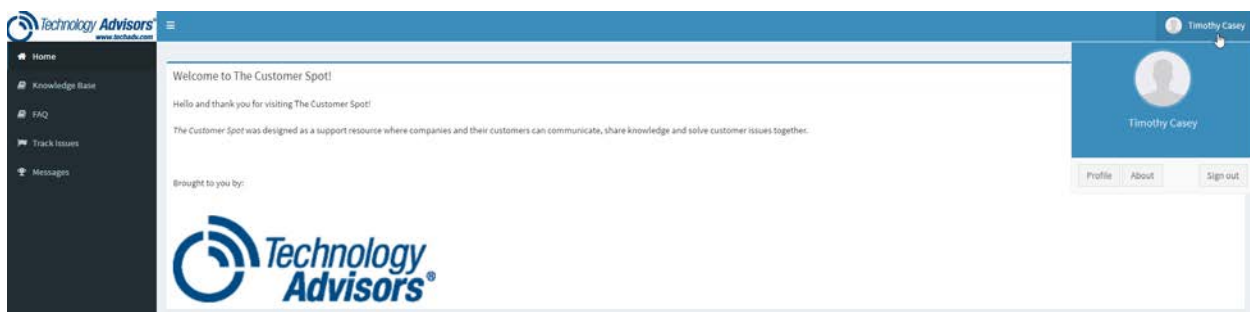


The screenshot shows a registration form titled "Register a new membership" for Technology Advisors. The form includes input fields for "First Name", "Last Name", "Email", and "Company Name". Below the fields is a blue "Register" button and a link that says "I already have a membership". The Technology Advisors logo and website URL (www.techadv.com) are visible at the top of the form.

ii. Navigation and how to use each section

Once logged in to the portal, you will arrive at the “Home” screen. You will notice there are 5 sections on the left side of the screen. These can be clicked on to navigate to the different pages within the portal.

You will also notice your name in the top right corner of the screen. By clicking your name, you are presented with the option to view your profile, view the about page, or sign out of the portal. Your profile contains your contact information and can be updated directly from the Customer Spot portal. If you would like to update anything or change your password, you may do so from this screen. The About button will display version information as well as sales and support contact information. Lastly, if you select the sign out option, you will be logged off and returned to the main sign in screen.



Now we will take a look at each section and how they can be used:

a. Home

As stated above, when you first login you are placed at the home screen. If you ever want to return to this section, simply click the “Home” button on the navigation bar on the left.

The home section is used to display announcements from the portal administrators. Keep an eye on this section as important general information should be presented here first. If you scroll down, you will see some of the FAQ’s embedded on the page below the announcements. FAQ’s will be covered in their own section below.

b. Knowledge Base

The Knowledge Base section holds helpful Knowledge Base articles that are written by the portals administrators. At the top of the screen, there are two options to sort these articles: Table View or Tree View.

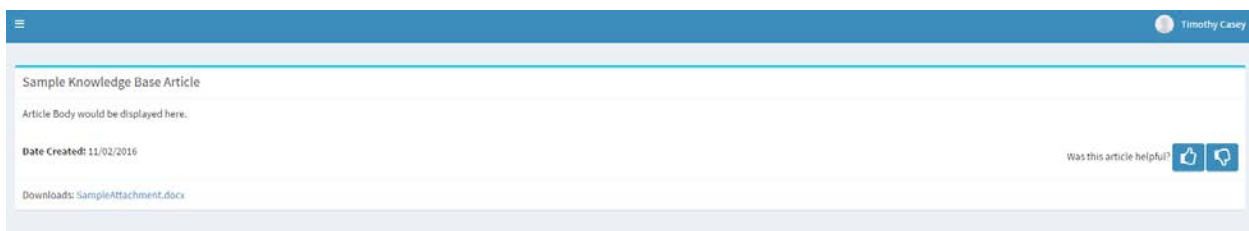
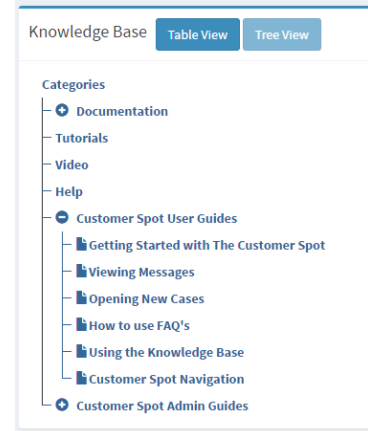
Table View is the default option. Table view arranges all of the knowledge base articles in to a large table that is sortable by Name, Total Views, Number of Likes, Number of Dislikes and Date Created. Most users will want to use the search field near the top-right of the table to locate specific articles. The displayed articles will be filtered dynamically as you type in your search terms. Users also have the option of choosing how many records are displayed per page and can navigate through the different pages at the bottom right corner of the table.

Name	Views	Likes	Dislikes	Date Created	IF
Adding Notes and Attachments	0	0	0	11/02/2016	
Administering Cases	0	0	0	11/02/2016	
Posting KB Articles	0	0	0	11/02/2016	
Adding New Messages and Announcements	0	0	0	11/02/2016	
Integration with Contacts Module	0	0	0	11/02/2016	
How to add new Customer Spot Users	0	0	0	11/02/2016	
Viewing Messages	0	0	0	11/02/2016	
Opening New Cases	0	0	0	11/02/2016	
How to use FAQ's	0	0	0	11/02/2016	
Using the Knowledge Base	0	0	0	11/02/2016	

If Tree View is selected, the same articles are now displayed arranged in to categories as opposed to a sortable table. The categories are expandable and collapsible by clicking the plus and minus buttons.

The same list of articles will appear in both Table and Tree view, so choose whichever you are most comfortable with. Once you find an article you are interested in, simply click the name of that article to navigate to its page.

Each article will contain a subject, body and date created field. Some articles may also contain attachments. If the article does contain attachments, they will show up as downloadable links at the bottom of the page. Lastly, there are thumbs up and thumbs down icons to indicate whether or not you found this article helpful. Each user is allowed one vote per article, and can change their vote at any time. As mentioned earlier, the number of likes and dislikes can be used to sort articles in Table View.



To leave a record and return to the list of Knowledge Base articles, simply use your browsers back button or click on Knowledge Base icon on the left-side of the screen.

c. FAQ

The FAQ sections contains Frequently Asked Question articles written by the portals administration team. The functionality of the FAQ page is identical to the Knowledge Base page when Knowledge Base is arranged in to Table View. FAQ's are not able to be arranged in to Tree View.

All of the FAQ's are presented in a large table that can be sorted by Name, Total Views, Number of Likes, Number of Dislikes, and Date Created. Once again, there is a search field near the top-right of the table that can be used to search for specific FAQ's. The search feature looks at FAQ title and body and will dynamically filter results as you type in your search terms. Users also have the option of choosing how many records are displayed per page and can navigate through the different pages at the bottom right corner of the table.

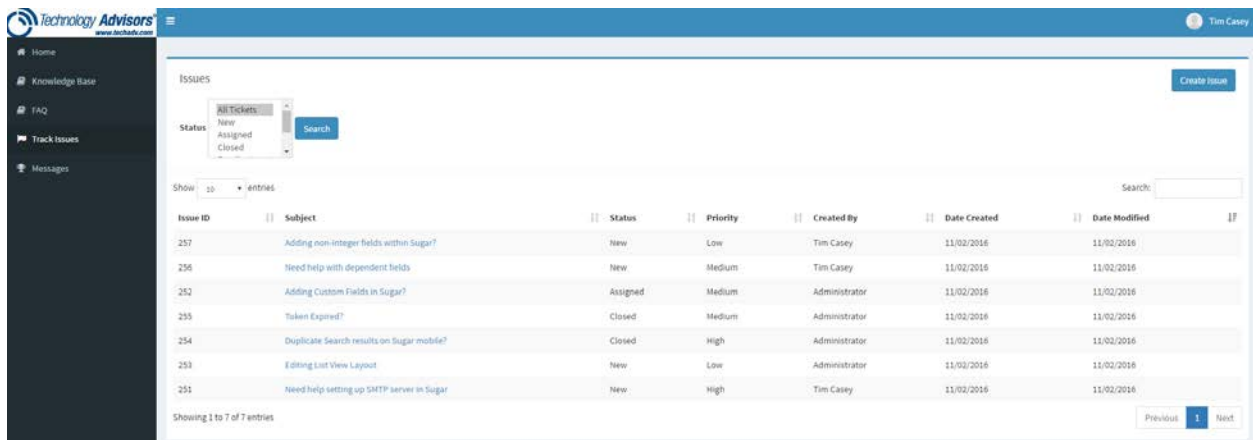


Each FAQ record will contain a subject, body and date created field. Attachments are also optional for all FAQ's. If the record does contain an attachment, those will show up in the download section at the bottom of the page. Lastly, there are thumbs up and thumbs down icons to indicate whether or not you found this article helpful. Each user is allowed one vote per article, and can change their vote at any time. Likes and dislikes can be used to sort FAQ's when looking at the FAQ table view.

d. Track Issues

Track Issues will be where most Customer Spot users spend the majority of their time. Track Issues allows users to create and track issues as well as correspond with the teams working on your issues.

After first navigating to the Track Issues page, you will be greeted by a table view very similar to the past couple of sections. The issues table may be sorted in ascending or descending order by Issue ID, Subject, Status, Priority, Created By, Date Created and Date Modified. Users have the option of choosing how many records are displayed per page or also navigating through the different pages on the bottom right side. Using the search field near the top, users can search for specific articles by Subject OR Issue ID. Filtering by status is also supported.



Issue ID	Subject	Status	Priority	Created By	Date Created	Date Modified
257	Adding non-integer fields within Sugar?	New	Low	Tim Casey	11/02/2016	11/02/2016
256	Need help with dependent fields	New	Medium	Tim Casey	11/02/2016	11/02/2016
252	Adding Custom Fields in Sugar?	Assigned	Medium	Administrator	11/02/2016	11/02/2016
255	Token Expired?	Closed	Medium	Administrator	11/02/2016	11/02/2016
254	Duplicate Search results on Sugar mobile?	Closed	High	Administrator	11/02/2016	11/02/2016
253	Editing List View Layout	New	Low	Administrator	11/02/2016	11/02/2016
251	Need help setting up SMTP server on Sugar	New	High	Tim Casey	11/02/2016	11/02/2016

If you would like to create a new issue, start by clicking the “Create Issue” button above the search bar. This will take you to a new screen which allows you to enter a subject, description and set a priority level. There are also buttons to save your new issue, clear the form or cancel and return to the previous screen.

For the subject field, briefly describe your issue. Try to be descriptive and use keywords to provide a high level description of what the issue is about. The description field allows you to describe your issue in detail. You are limited to 500 characters for the description. Next, you can prioritize your issue as either Low, Medium or High. This allows the support team to prioritize the most important issues first. Finally, you can choose to attach a file to provide additional information about the issue you are having. Once everything is filled in, you can enter the issue by selecting the save button.



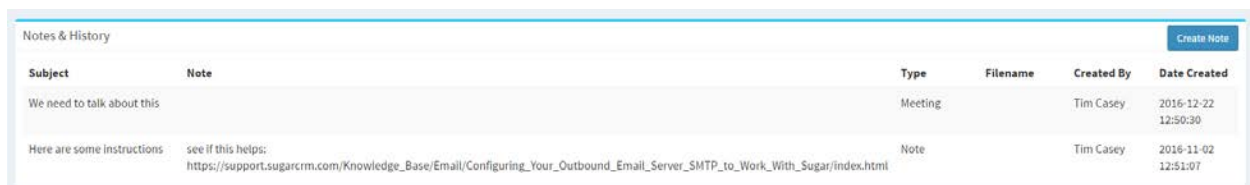
Once you save a new issue, you will be taken back to the main Track Issues page where you will see your new issue as the first entry in the table. If your issue does not have an Issue ID, this is normal, it will automatically be assigned an ID and updated once it syncs with the external database.

When an issue is selected from the table, you are presented with additional details regarding the issue as well as the option to leave a note. Notes entered from the support team can be viewed here as well. The additional details regarding new issues such as Type, Assigned To and Modified By are controlled by the administrators and cannot be edited by Customer Spot users.



The note functionality can be used to provide additional details surrounding the issue, communicate with the support team working the issue and also can be used to provide additional attachments. To create a new note, simply click the "Create Note" button. Here you can give your note a subject, provide a description and also include an attachment from your local PC. Once you have finished and clicked the save button, you will see your note appear in the Notes & History section of the page.

The Notes & History section will contain all related Notes, Calls, Meetings, Tasks and Emails. Updates will be displayed in chronological order with the most recent activities appearing at the top of the table. Communications from the support team are shown here as well, if attachments are provided by the support team, they will appear as downloads.

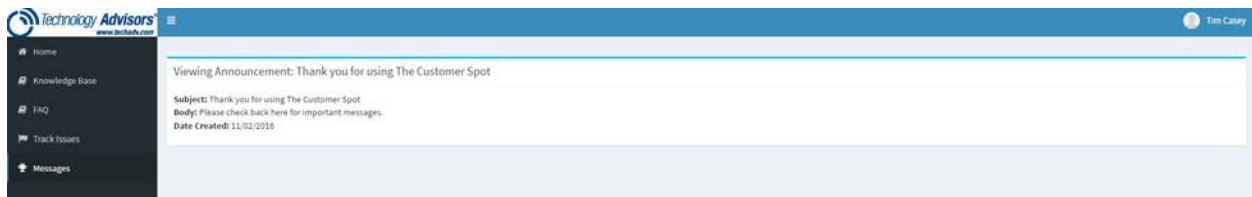


e. Messages

The Messages page is used to display messages entered by the portals administrators. It is recommended to occasionally review the messages page to check for new information.

Messages are presented in the standard table view with options to sort by Subject or Date Created. Users have the option of choosing how many messages are displayed per page and navigating through individual pages on the bottom right of the screen. The search field can be utilized to search for specific messages by subject.

Clicking on a message allows you to read the body of the message. The subject and date created are also displayed on this page.

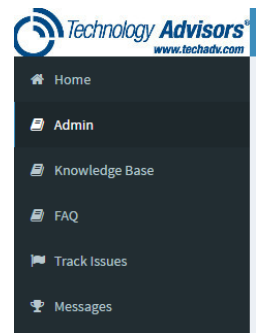


f. Admin

The Admin section is used for logo and skin customization. The Admin section will only be displayed for users who have been assigned “Admin” permissions via Sugar CRM.

There are a number of skins that can be selected from a dropdown list that will change the color scheme of *The Customer Spot* portal. If a new skin is selected, the new skin will be displayed for all users.

Admin users also have the option of uploading custom logo's or images that will be displayed on the Login page, Registration page or the top-left section of *The Customer Spot's* main banner. These images must be .jpg or .png format and should be scaled to the proper size before uploading. If an uploaded image has not been correctly scaled, it will be scaled during the upload process, however, this may negatively affect the resolution of the image.



Admin Settings

Skin:

Top Left Logo Expanded: No file chosen

.jpg and .png are the only acceptable formats. Images will be scaled to 230x50 px. For best results edit image before uploading to match these dimensions.



Top Left Logo Compressed: No file chosen

.jpg and .png are the only acceptable formats. Images will be scaled to 50x50 px. For best results edit image before uploading to match these dimensions.



Login Logo: No file chosen

.jpg and .png are the only acceptable formats. Images will be scaled to 360x50 px. For best results edit image before uploading to match these dimensions.



Registration Logo: No file chosen

.jpg and .png are the only acceptable formats. Images will be scaled to 360x50 px. For best results edit image before uploading to match these dimensions.

