



# EMPLOYEE PORTAL

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User Manual Version 1.0

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## Introduction

The BMS Customer Portal is designed to enhance communication for employees and streamline essential tasks. Through this portal, users can sign their terms and conditions letter, raise a case to address any concerns, add comments, upload files, and complete various other necessary actions. It serves as a one-stop solution for all employee-related activities, providing an efficient and user-friendly platform.

## Who should use this manual

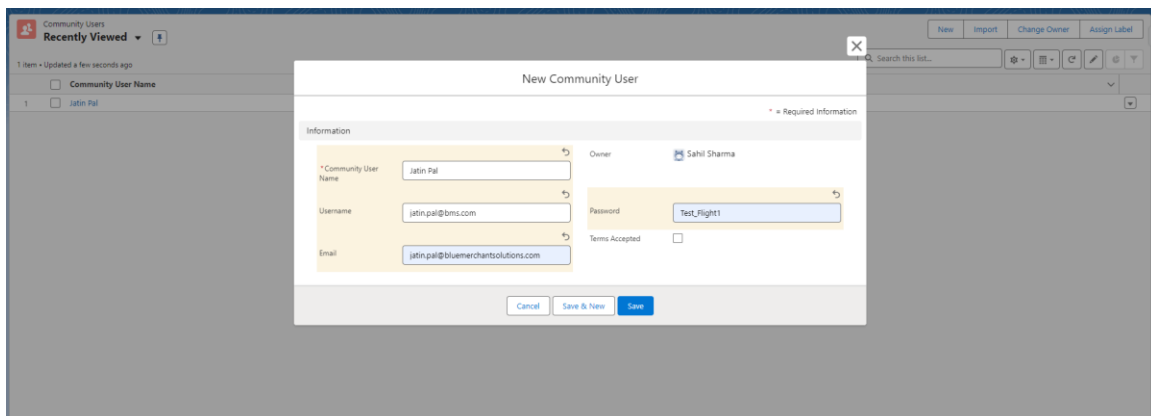
This manual is specific to all Salesforce users who installed the BMS Customer Portal application on Salesforce.

## Process Overview

After installing the BMS Customer Portal package from the AppExchange, you will have access to a fully configured digital experience site. To manage community users and their data, navigate to the BMS Customer Portal app via the App Launcher. Here, you can create community user records, which include essential fields like Username and Password for validating and managing user credentials. These credentials enable community users to log in and access the portal's features securely. You can also update or reset these credentials as needed to maintain secure access.

## Create New Community User

Go to object 'Community User' listview page and click on the new button to open the below modal:



The screenshot shows the 'New Community User' modal form in Salesforce. The form is titled 'New Community User' and includes a close button (X) in the top right corner. It features a search bar and a list of actions: 'New', 'Import', 'Change Owner', and 'Assign Label'. The form is divided into two columns. The left column contains the following fields: 'Community User Name' (with a dropdown arrow), 'Name' (text input with 'jatin.pal'), 'Username' (text input with 'jatin.pal@bms.com'), and 'Email' (text input with 'jatin.pal@bluemerchantsolutions.com'). The right column contains: 'Owner' (with a dropdown arrow and 'Sahil Sharma' selected), 'Password' (text input with 'Text\_Flight1'), and 'Terms Accepted' (checkbox). A legend indicates that fields with an asterisk (\*) are required information. At the bottom of the modal, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

From this modal, you can create a new record by adding the Name, Username, Password, and Email, then clicking Save. This will create a new community user in the system, allowing the user to log in through the community site.

## To Import Community User Record

Click on Import button on 'Community User' listview page to view this screen:

The screenshot shows the 'Choose data' step of the Salesforce Data Import Wizard. At the top, there are three progress indicators: 'Choose data' (active), 'Edit mapping', and 'Start import'. Below the progress bar, the title is 'Import your Data into Salesforce' with a sub-note: 'You can import up to 50,000 records at a time.' On the right, there is a 'Help for this page' link. The main content area is divided into three sections: 'What kind of data are you importing?' with tabs for 'Standard objects' and 'Custom objects', and a list containing 'Community Users'; 'What do you want to do?' with an empty box; and 'Where is your data located?' with an empty box. At the bottom right, there are 'Cancel', 'Previous', and 'Next' buttons.

Once all the records are created, you can find them under the 'Community Users' tab.

## Digital Experience Site Configuration

### Create a Public Site:

- Navigate to Setup in your Salesforce instance.
- In the Quick Find box, type Sites and click on Sites under the Digital Experiences section.
- Click New to create a new site.
- Configure the necessary details for your public site, such as the site name, URL, and contact details.
- Ensure you select the correct Active Site Home Page and Site Template for your specific requirements.

### Create New Pages:

- Once your site is created, navigate to the Site Pages section.
- Click New Page.
- You will see the pages that were installed from the package, including:
  - o Past Cases
  - o Raise Case
  - o Upload Files
  - o Home
- Create each of these pages by selecting them from the available templates or configurations.

### Finalize the Setup:

- After creating the pages, review their layouts and settings as needed.
- Ensure all following permissions and access levels are set for users visiting the public site and publish the community.
  - Employee Terms & Conditions – Assign this permission set to the guest user profile.

# Customer Portal User Journey

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This section outlines the steps for accessing and navigating the customer portal. The portal allows users to view and manage their cases, create new cases, interact with internal users, and fulfill specific actions related to their cases.

## 1. Receiving Credentials and Portal URL

Once the admin creates an account for the customer, the customer will receive an email with the portal URL, username, and password. These credentials will allow access to the portal.

## 2. Logging into the Portal

To access the portal, follow these steps:

1. Click on the portal URL provided by the admin.
2. Enter the username and password you received.
3. If the credentials are correct, you will be successfully logged in.

## BMS Employee Portal



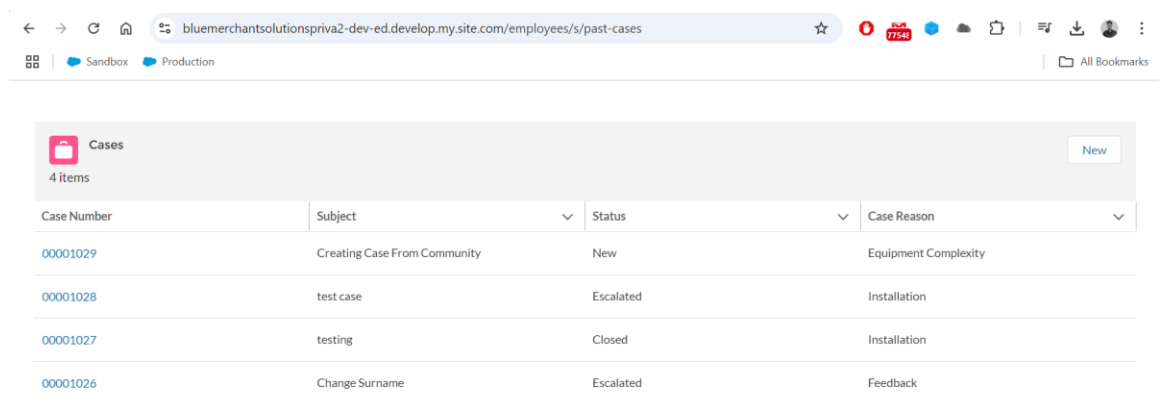
A login form for the BMS Employee Portal. It features two input fields: the top one is labeled '\* Username' and the bottom one is labeled '\* Password'. Below the password field is a blue 'Log In' button.

## 3. Viewing Past Cases

After logging in, you will be redirected to the 'Past Cases' page where you can:

1. View all historical data of your past and existing cases.

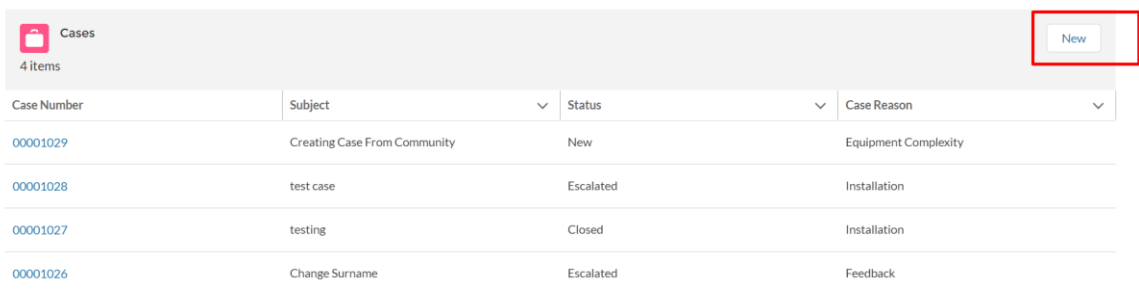
2. If there are open cases, you can view and interact with them.



| Case Number | Subject                      | Status    | Case Reason          |
|-------------|------------------------------|-----------|----------------------|
| 00001029    | Creating Case From Community | New       | Equipment Complexity |
| 00001028    | test case                    | Escalated | Installation         |
| 00001027    | testing                      | Closed    | Installation         |
| 00001026    | Change Surname               | Escalated | Feedback             |

## 4. Creating a New Case

You can create a new case directly from the portal by clicking the 'New' button.



| Case Number | Subject                      | Status    | Case Reason          |
|-------------|------------------------------|-----------|----------------------|
| 00001029    | Creating Case From Community | New       | Equipment Complexity |
| 00001028    | test case                    | Escalated | Installation         |
| 00001027    | testing                      | Closed    | Installation         |
| 00001026    | Change Surname               | Escalated | Feedback             |

### BMS Create Case - Employee Terms & Conditions

\* Subject

Case Reason

--None--

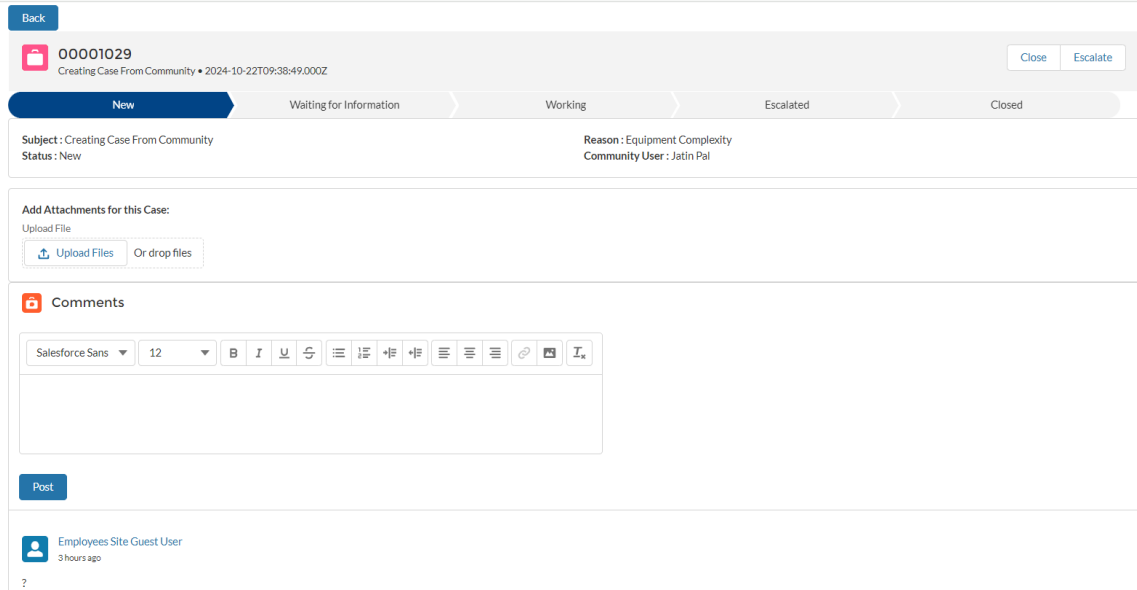
Description

Next

## 5. Interacting with Open Cases

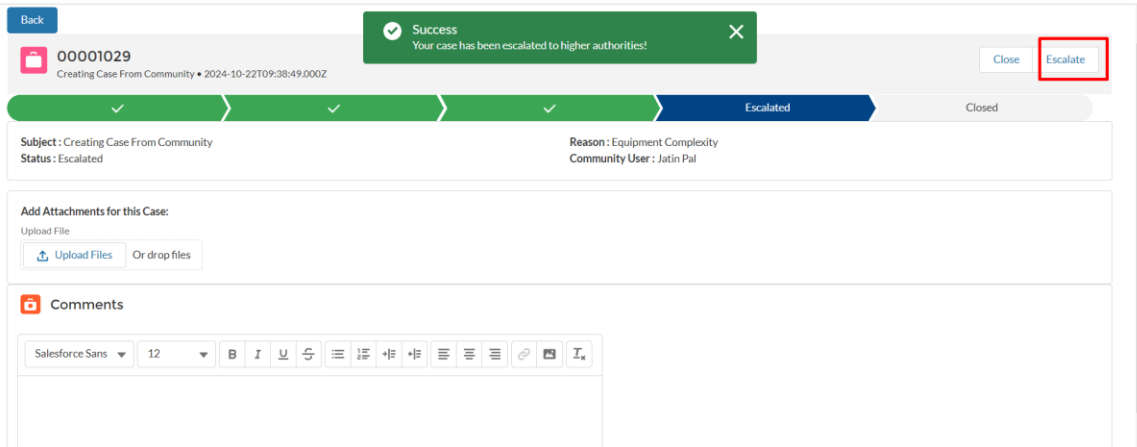
For any open cases, you can:

1. Add comments on the case to interact with internal users.
2. Escalate the case if necessary.



The screenshot shows a case detail page for case ID 00001029. The case is in the 'New' status, indicated by a blue arrow in the progress bar. The subject is 'Creating Case From Community' and the status is 'New'. The reason is 'Equipment Complexity' and the community user is 'Jatin Pal'. There is an 'Add Attachments for this Case' section with an 'Upload File' button and a text area for 'Add Attachments for this Case:'. Below that is a 'Comments' section with a rich text editor and a 'Post' button. The user 'Employees Site Guest User' is listed as the author of the case, with a timestamp of '3 hours ago'.

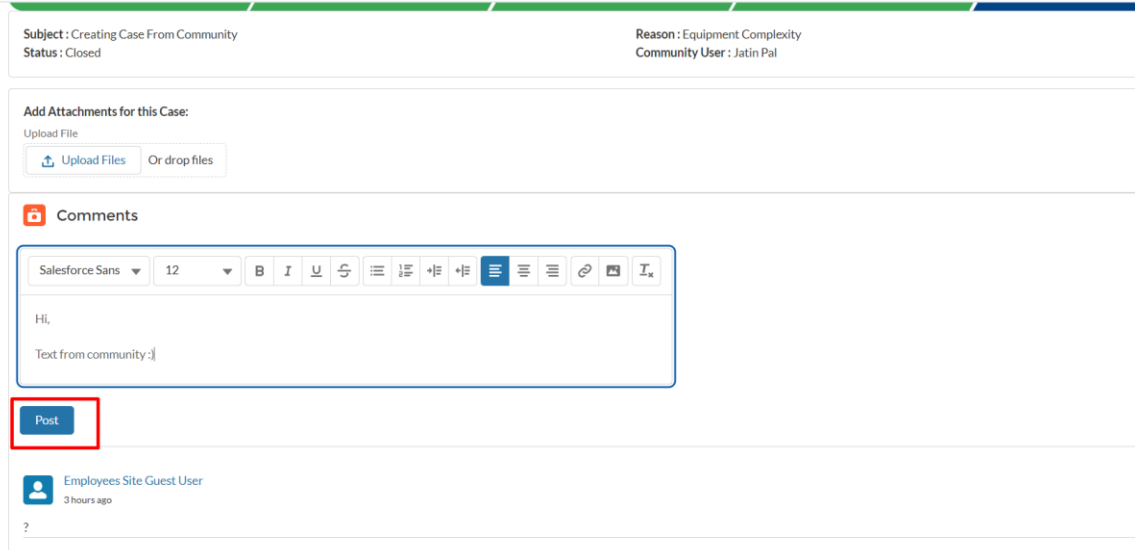
(Record Detail Page)



The screenshot shows the same case detail page for case ID 00001029, but now the case is in the 'Escalated' status, indicated by a blue arrow in the progress bar. A green success message is displayed at the top: 'Success Your case has been escalated to higher authorities!'. The 'Escalate' button in the top right corner is highlighted with a red box. The subject is 'Creating Case From Community' and the status is 'Escalated'. The reason is 'Equipment Complexity' and the community user is 'Jatin Pal'. There is an 'Add Attachments for this Case' section with an 'Upload File' button and a text area for 'Add Attachments for this Case:'. Below that is a 'Comments' section with a rich text editor.

(Escalate Case Functionality)

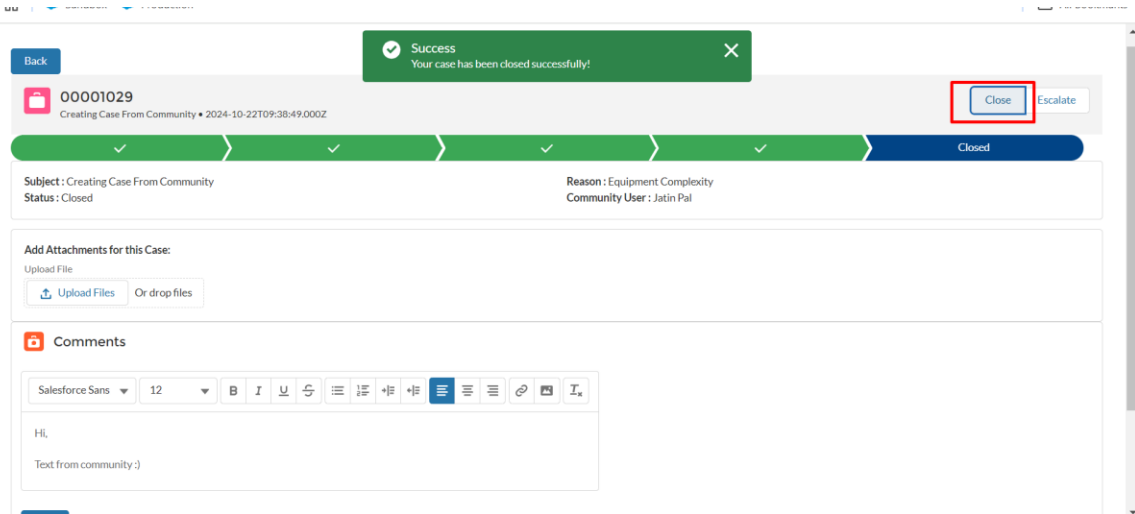




(Posting Comments)

## 6. Marking Case as Closed

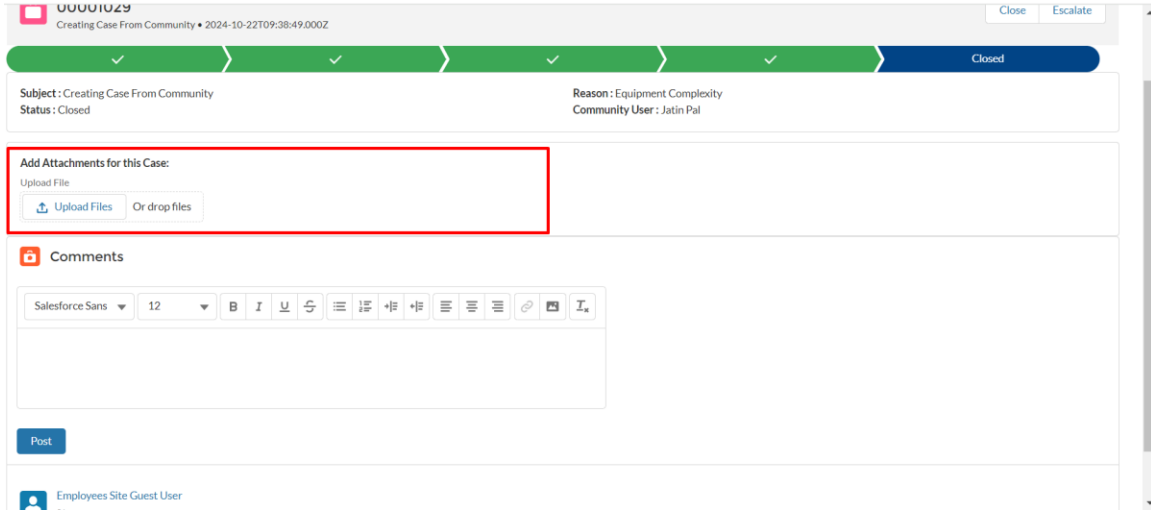
Once the case is successfully resolved, you can mark it as closed directly from the portal.



(Case Closed)

## 7. Adding Attachments

You can add relevant attachments to your cases, such as documents or images.

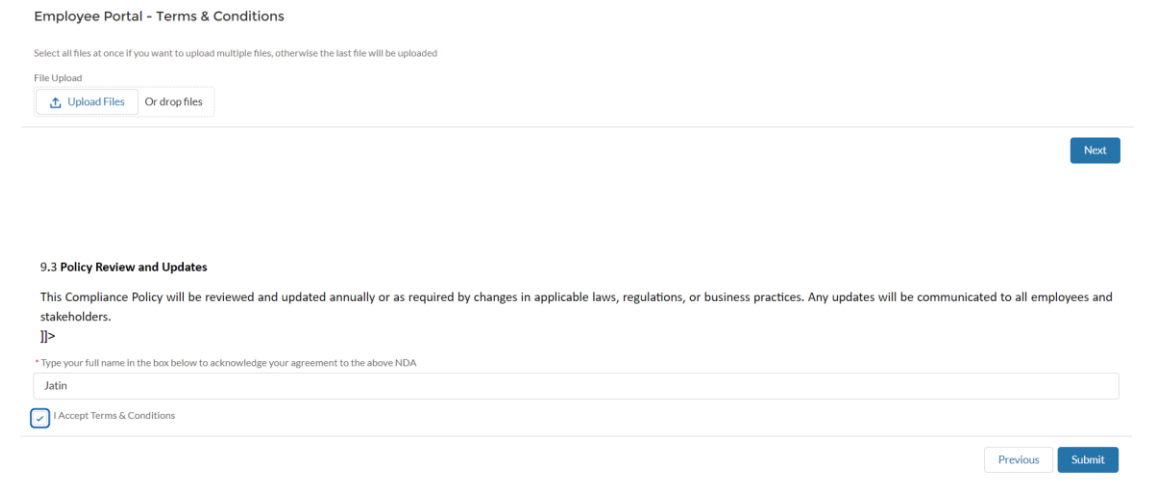


(Upload Attachments)

## 8. Terms and Conditions Acceptance

During the onboarding process, you will be presented with a Terms and Conditions page where you can:

1. Review the terms and conditions.
2. Sign the terms by clicking the 'Submit' button.
3. Upon submission, a confirmation email will be sent to you and the organization's team.



## Help and Support

Blue Merchant Solutions

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