Setup Customer Support Portal With Global Settings

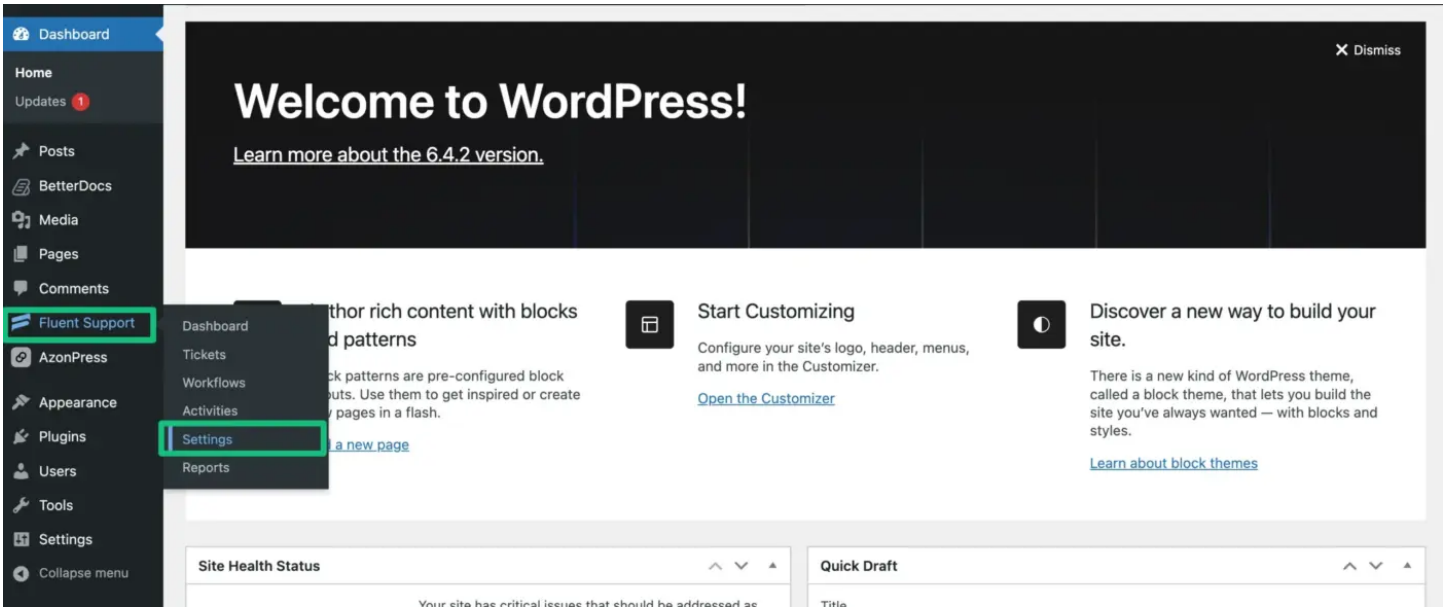
Business Management · https://fluentsupport.com/docs/customer-support-portal-setup/

The Customer Portal is intended for direct use by end-users where users can view & use the dashboard to submit tickets. This article will guide you to set up your **Customer Portal** with **Global Settings** in **Fluent Support**.

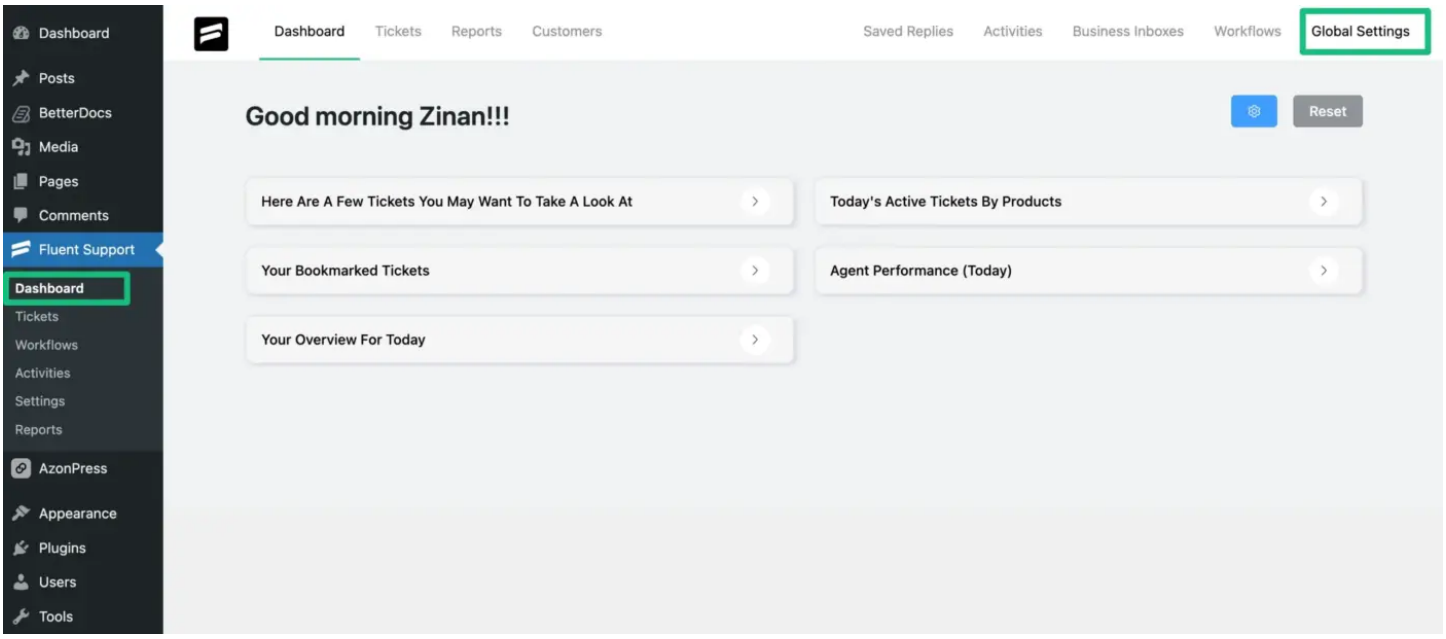
Global Settings

To learn where you can find the **Global Settings** to set up the portal, follow the steps with the screenshots below —

Either go to your **Fluent Support** and click on **Settings**.

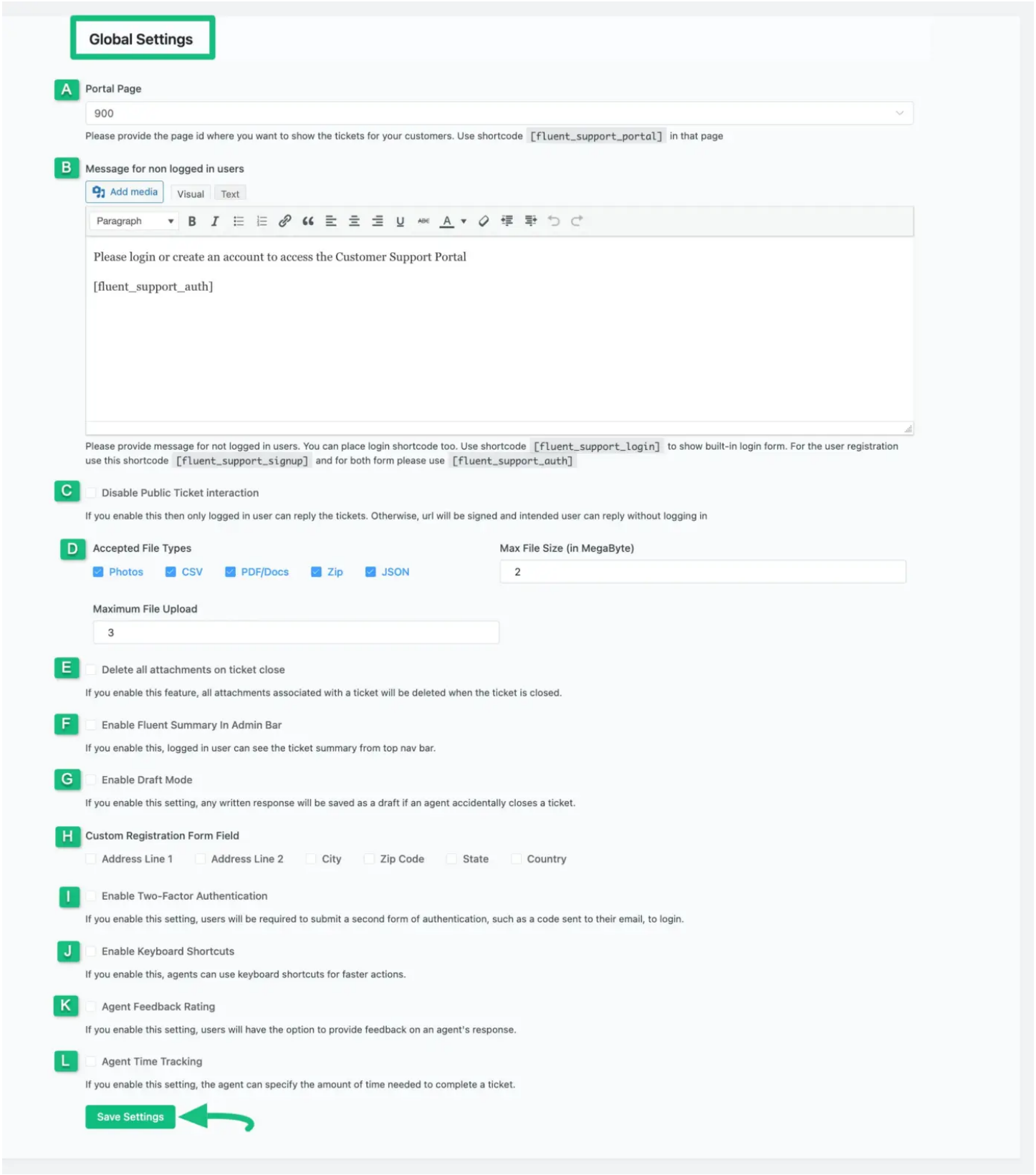


Or, you can go to your **Fluent Support Dashboard** & click on **Global Settings**.



This will take you to the **Global Settings** page, where you can set up the portal page for your customers.

Remember, always press **Save Settings** after finishing all the customization in your **Global Settings** to save it. Otherwise, changes will not appear in your Customer Portal.


Global Settings
A
Portal Page
900
Please provide the page id where you want to show the tickets for your customers. Use shortcode [fluent_support_portal] in that page
B
Message for non logged in users
Add media
Visual
Text
Paragraph
Please login or create an account to access the Customer Support Portal
[fluent_support_auth]
Please provide message for not logged in users. You can place login shortcode too. Use shortcode [fluent_support_login] to show built-in login form. For the user registration use this shortcode [fluent_support_signup] and for both form please use [fluent_support_auth]
C
Disable Public Ticket interaction
If you enable this then only logged in user can reply the tickets. Otherwise, url will be signed and intended user can reply without logging in
D
Accepted File Types
Photos
CSV
PDF/Docs
Zip
JSON
Max File Size (in MegaByte)
2
Maximum File Upload
3
E
Delete all attachments on ticket close
If you enable this feature, all attachments associated with a ticket will be deleted when the ticket is closed.
F
Enable Fluent Summary In Admin Bar
If you enable this, logged in user can see the ticket summary from top nav bar.
G
Enable Draft Mode
If you enable this setting, any written response will be saved as a draft if an agent accidentally closes a ticket.
H
Custom Registration Form Field
Address Line 1
Address Line 2
City
Zip Code
State
Country
I
Enable Two-Factor Authentication
If you enable this setting, users will be required to submit a second form of authentication, such as a code sent to their email, to login.
J
Enable Keyboard Shortcuts
If you enable this, agents can use keyboard shortcuts for faster actions.
K
Agent Feedback Rating
If you enable this setting, users will have the option to provide feedback on an agent's response.
L
Agent Time Tracking
If you enable this setting, the agent can specify the amount of time needed to complete a ticket.
Save Settings

Setup Customer Support Portal

You will find the following **Settings Options** in **Global Settings** to set up your **Fluent Support Customer Portal**. These are:

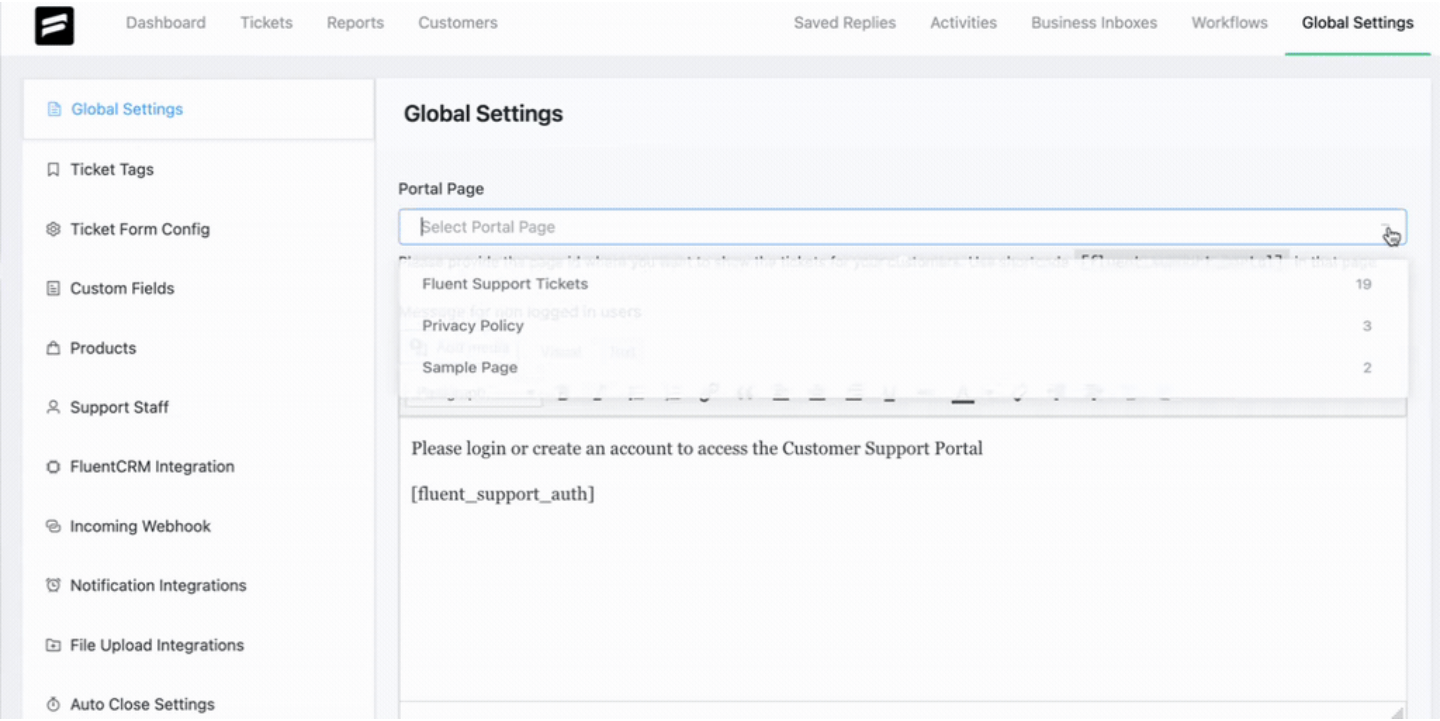
A. Portal Page
B. Message for non-logged-in users
C. Disable Public Ticket Interaction
D. Accepted File Types
E. Delete all attachments on ticket close
F. Enable Fluent Summary in Admin Bar
G. Enable Draft Mode
H. Customer Registration Form Field
I. Enable Two-Factor Authentication
J. Enable Keyboard Shortcuts
K. Agent Feedback Rating
L. Agent Time Tracking

To learn how to set up a Customer Support Portal with these settings, follow the steps with screenshots below —

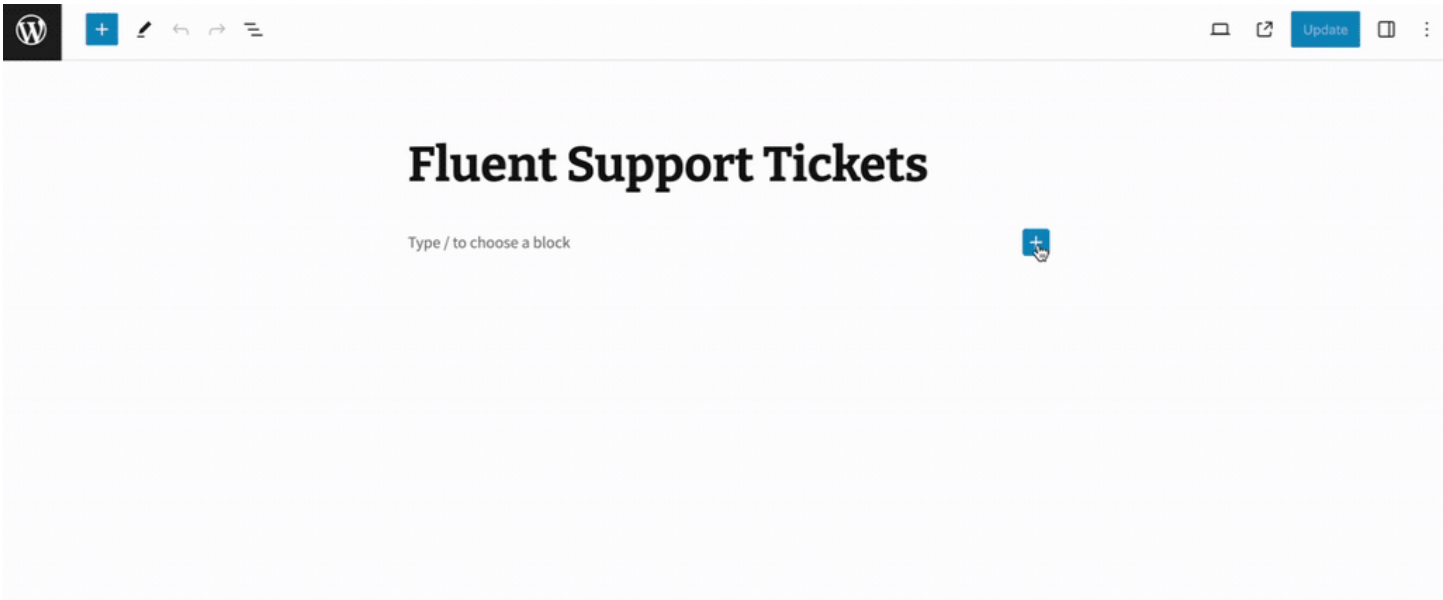
A. Portal Page

In the '**Portal Page'** option, you can select the **Page** where you want to show the **Support Portal** for your customers to submit their tickets. You can **select** your desired **page** in **two different ways** and these are shown in the **GIFs** below —

- Select the desired page directly from the **Dropdown** option. Or, copy the **Shortcode** given just below the **Portal Page**.



- And, paste it manually on your **Desired page**.

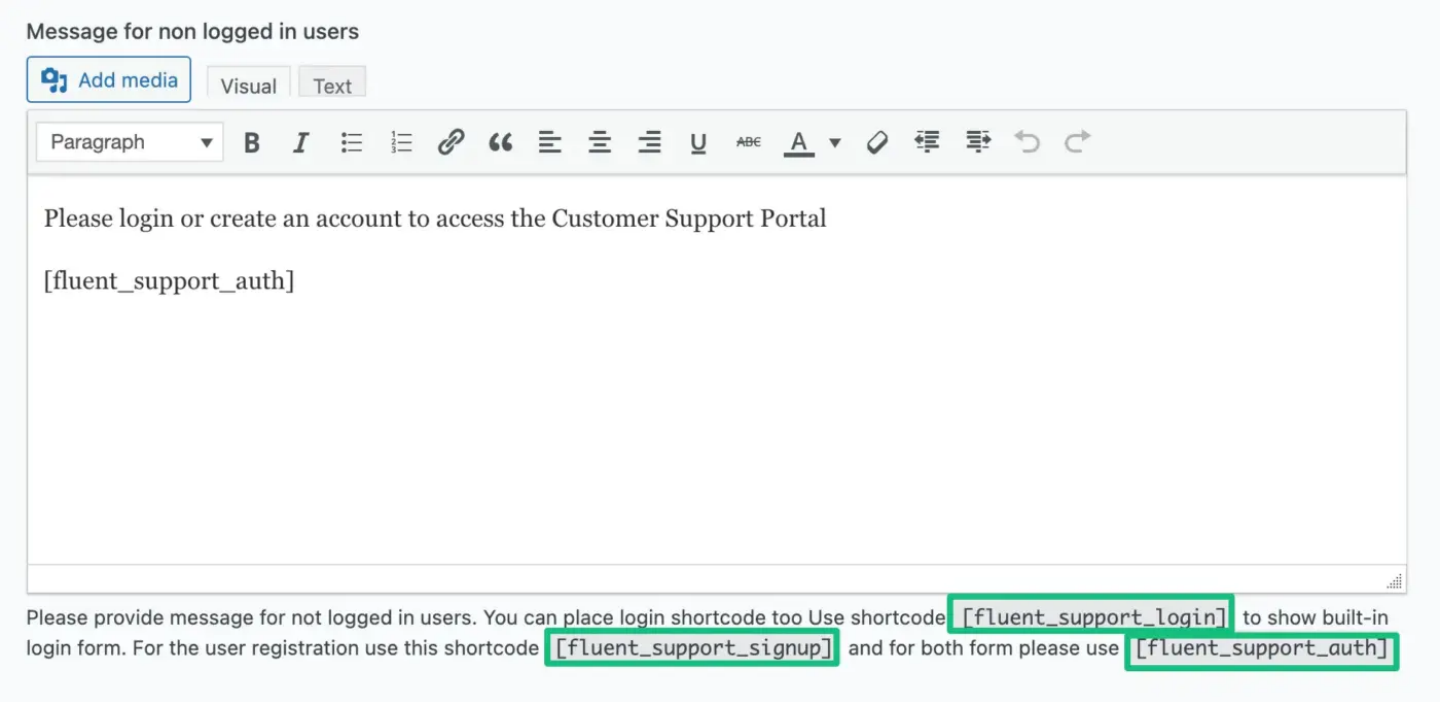


B. Message for non-logged-in users

In this option, you can customize certain texts for the users who have not logged in.

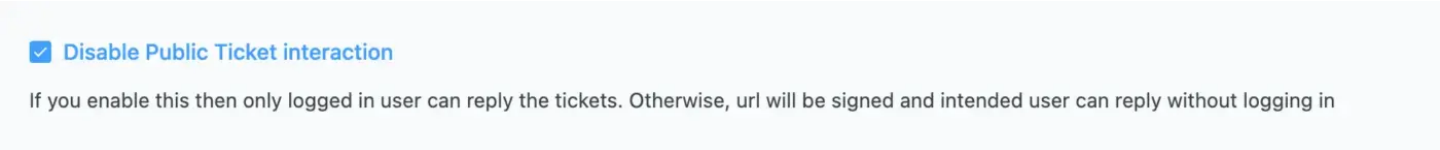
- You will see a default message **(Please login or create an account to access the Customer Support Portal)** has been added which you can edit anytime according to your need.
- Also, you can use different **Shortcodes** provided below to show different **Forms**.

To know the details of these below-mentioned **Shortcodes,** check this **Documentation.**



C. Disable Public Ticket Interaction

Enabling '**Disable Public Ticket Interaction'** allows only logged-in users to reply to tickets. If you uncheck the option, users can reply to tickets without logging in using a signed URL.



D. Accepted File Types

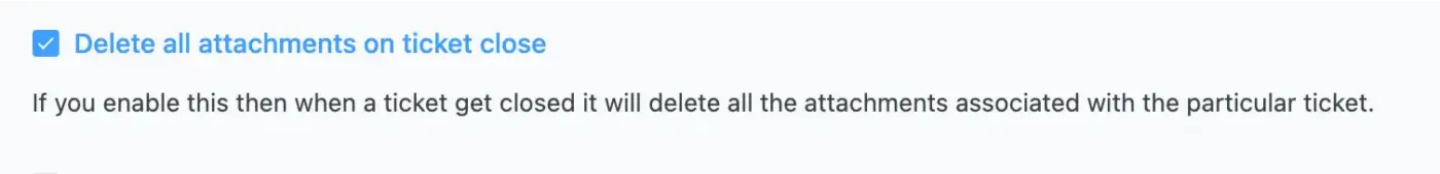
Fluent Support accepts photos, CSV, PDF/Docs, Zip, and JSON files. You can also set the maximum file size and number of files to upload.

To learn the details about file **Attachment Regulations**, read this **Documentation**.



E. Delete all attachments on ticket close

If you enable the '**Delete all attachments on ticket close'** option, it will automatically delete all attachments associated with a particular ticket when it is closed.



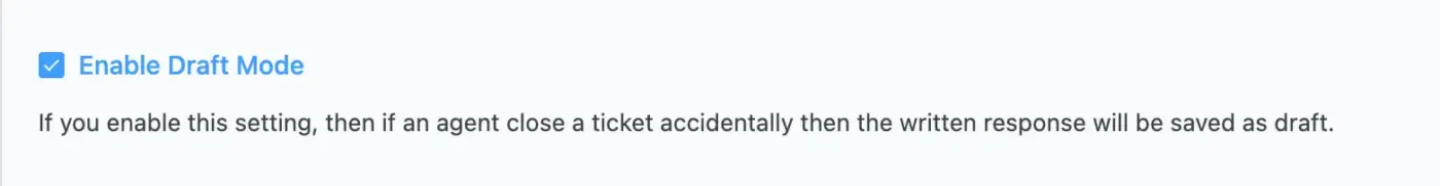
F. Enable Fluent Summary in Admin Bar

Enable the **'Fluent Summary in Admin Bar'** option allows users to see a ticket summary from the top nav bar.



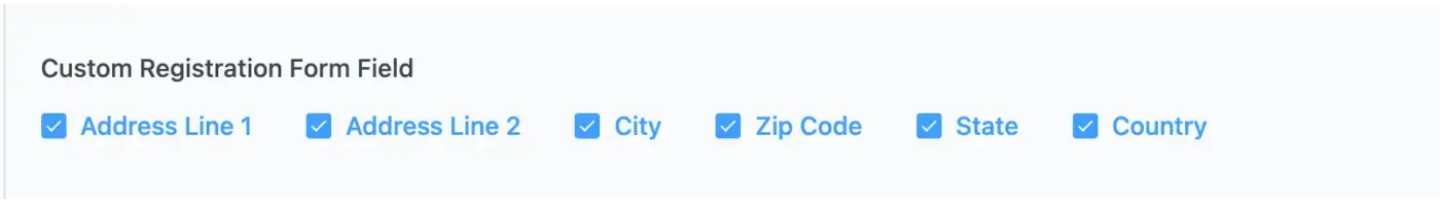
G. Enable Draft Mode

The **‘Enable Draft Mode’** allows agents to save responses automatically as drafts to avoid accidental ticket closures or reply to the ticket later.



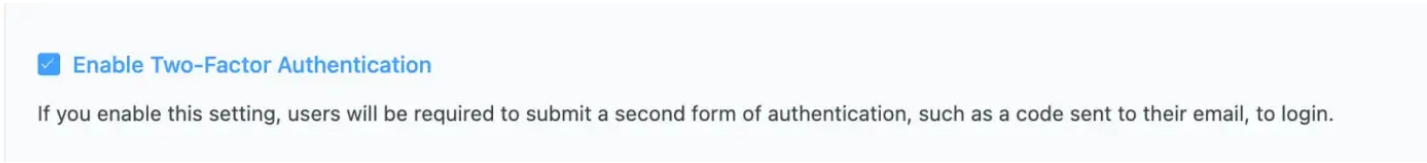
H. Customer Registration Form Field

The ‘**Customer Registration Form Field’** allows agents to get the information in the customer registration form using the below-mentioned fields.



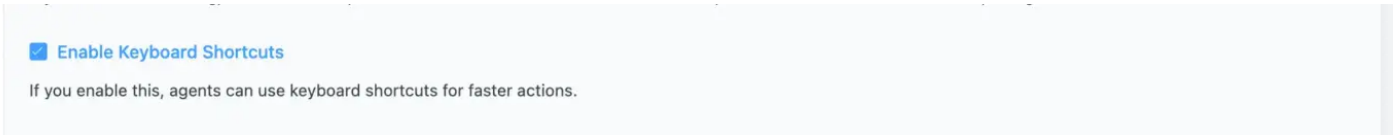
I. Enable Two-Factor Authentication

If you **enable** the **'Enable Two-Factor Authentication'** option, this will require customers to enter a verification code sent to their email whenever they try to log in to the customer portal.



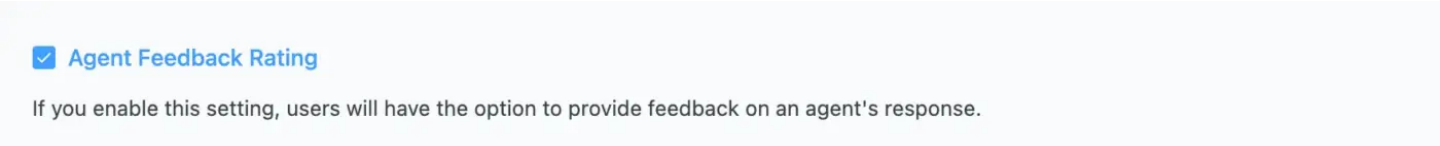
J. Enable Keyboard Shortcuts

Enabling the ‘**Enable Keyboard Shortcuts’** option allows agents to use keyboard shortcuts for faster actions.



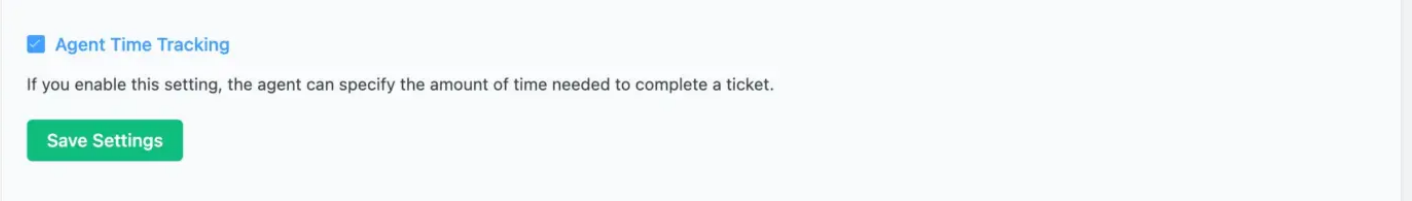
K. Agent Feedback Rating

Enabling the '**Agent Feedback Rating'** option allows users to provide feedback on agent responses.



L. Agent Time Tracking

Enabling the '**Agent Time Rating'** option allows agents to set the amount of time a user needs to complete a ticket.



Always press **Save Settings** after finishing all the customization in your **Global Settings** to save it. Otherwise, changes will not appear in your Customer Portal.

If you have any further questions, concerns, or suggestions, please do not hesitate to contact our **@support team**. Thank you.