

Customer-Centric CRM: Customer Portal

The Opportunity

Empower customers to get the help and information they need when they need it. Give customers control over their communication with your company using a customer portal.

A customer portal is a home behind a login where customers can view, open, and reply to their support tickets. Typically, customers can access the customer portal via the knowledge base, but you can also share a link to the portal directly with your customers.

How It Works

Connected to your shared Inbox, your Customer Portal keeps ticket conversations going between customers and reps, offers access to your Knowledge Base, and can be customized to fit your brand - no coding required.

Is Customer Portal right for me?

If you answered yes to any of the following, then Customer Portal might be the right fit for you.

Functional Benefits

- I need to ensure my customers know the status of their support tickets - without needing to reach out to ask.
- I need to respond to a conversation about a ticket on my customer's terms.
- I need to make it easy for my customers to access answers my support team has previously given them.
- I need to offer the ability for my customers to view helpful documents related to a support inquiry.

Emotional Benefits

- A customer portal relieves the stress of answering repeat questions about ticket status.
- A customer portal gives my customers peace of mind that my team is working to resolve their issue.

Subscription



- ▶ Service Hub Pro
- ▶ Service Hub Enterprise

Knowledge Base



- ▶ Check out this article for the complete step-by-step guide to [set up a customer portal](#).



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The Portal consists of three main pages:

1 - Ticket Listing page

This page lists all open and closed Tickets associated with the customer logged into the Customer Portal.

You can filter and search tickets listed here.

2 - Ticket Detail page

If you click any ticket on the Ticket Listing page, it will take you to view the corresponding Ticket Detail page.

This page shows the Conversation associated with the selected Ticket and allows customers to reply to the thread.

3 - Ticket Form page (Optional)

If a Ticket Form is enabled, a "File a Support Ticket" button will appear in the Customer Portal navigation menu.

Clicking it will take customers to a page with a form where they can create a Ticket describing their issue.

Key Features

| Feature | Description |
|----------------------|---|
| Authentication | <p>Access to Customer Portal requires that end-users login using one of the following methods:</p> <ul style="list-style-type: none">• HubSpot registration• SAML SSO• JWT SSO <p>Customer Portal authentication is powered by the Private Content tool already used in Service Hub's Knowledge Base, and pages/posts in the CMS.</p> |
| Self-Registration | <p>Allows Customer Portal visitors to create a login (if they don't already have an account created for Private Content/Knowledge Base).</p> |
| Custom Domain | <p>Customer Portal users can create or connect to a custom domain for their portal.</p> |
| Ticket Interaction | <p>Customers logged into the Customer Portal can view and reply to Open and Closed Tickets that are associated with their Contact record.</p> |
| Branding | <p>Customer Portal colors, logo, and favicon will be automatically be inherited from Account Branding Settings - but a user can also customize the colors and fonts of their portal.</p> |
| Optimized for mobile | <p>The default templates for Customer Portal will be mobile responsive.</p> |
| Language Settings | <p>The Customer Portal can be displayed in one language, which will be inherited from the domain. Text in the Customer Portal will be automatically translated based on selected language.</p> |