



# E-COMMUNICATIONS PORTAL USER GUIDE

## CONTENTS

Contents .....	2
About this Document .....	3
Non-Disclosure.....	3
Copyright .....	3
Document Control .....	3
Contact.....	3
Introduction .....	4
Sign Up .....	4
Sign In .....	5
Temporary Access .....	7
Managing Subscriptions .....	8
Update Details .....	10

## ABOUT THIS DOCUMENT

This document has been prepared as a User Guide the Communication Portal.

## NON-DISCLOSURE

All information contained in this document is to be treated as confidential information provided for the purpose of using Green 4 Solutions modules.

## COPYRIGHT

© Green 4 Solutions Ltd

While every effort has been made to ensure the accuracy of the information contained in this publication, the information is supplied without representation or warranty of any kind, is subject to change without notice and does not represent a commitment on the part of Green 4 Solutions Limited. Green 4 Solutions Limited therefore, assumes no responsibility and shall have no liability, consequential or otherwise, of any kind arising from this material or any part thereof, or any supplementary materials subsequently issued by Green 4 Solutions Limited. Green 4 Solutions Limited has made every effort to ensure the accuracy of this material.

## DOCUMENT CONTROL

Version	Date	Change	Initials
<b>V1.0</b>	19/10/2015	This is a new document	JW

## CONTACT

Any correspondence should be addressed to:

Product Development

Green 4 Solutions Limited

16-17 Midland Court

Central Park

Lutterworth

Leicestershire

LE17 4PN

UK

Phone: +44 (0) 845 508 8149

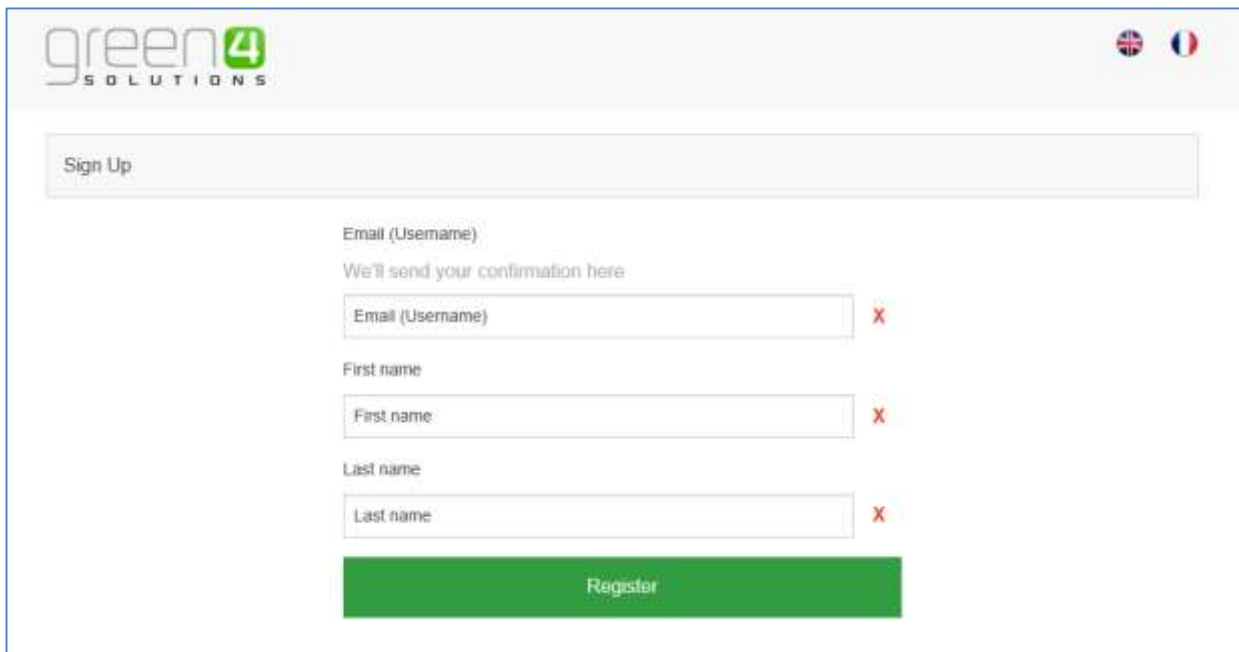
Email: [support@green4solutions.com](mailto:support@green4solutions.com)

Web: [www.green4solutions.com](http://www.green4solutions.com)

## INTRODUCTION

The Communications Portal can be used by clients who only have access to the ECommunications module within CRM. It allows for individuals to Sign Up to email campaigns, manage their own subscriptions to certain types of emails such as Newsletters, Promotions and Special Offers as well as enabling users to update their own details to control the emails that they are receiving.

## SIGN UP

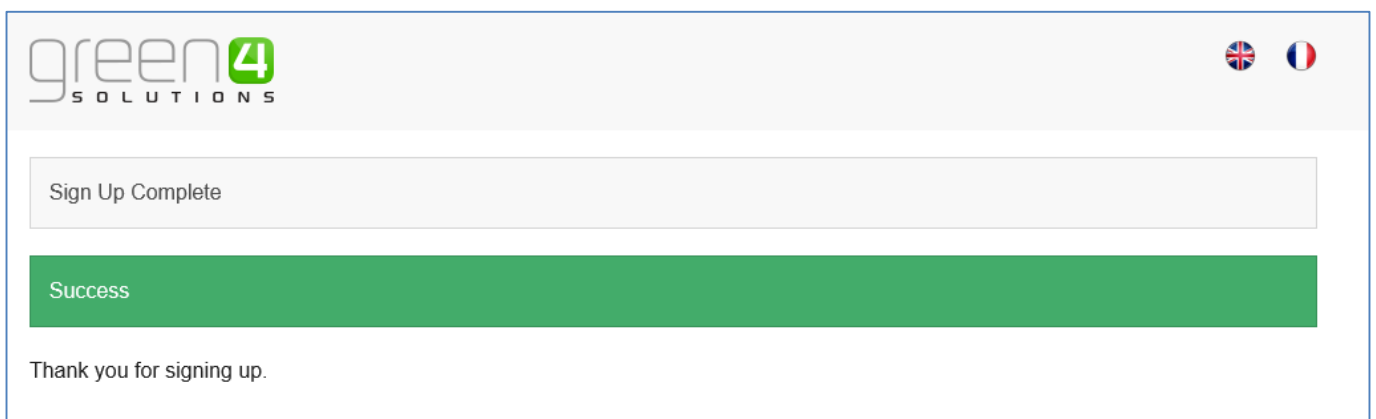


Upon opening the Portal the user will be greeted with the Sign Up page, this is where the Contact is created. The user should enter the following details:

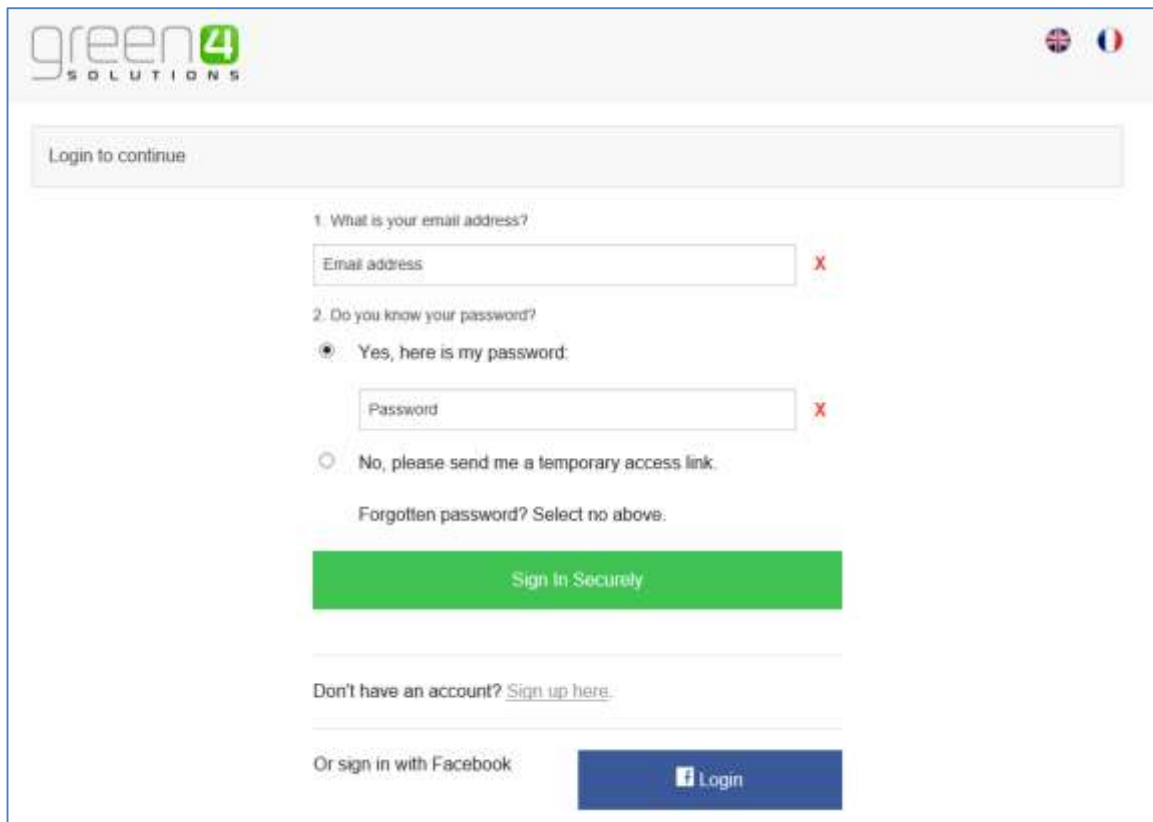
- **Email (Username)**
- **First Name**
- **Last Name**

Upon completing these details the green **Register** button at the bottom of the page should be selected.

If the Sign Up is a success, a new page will load thanking the user for signing up. If a user cannot register, the reason why will be shown in red, for example due to the email address being used already.



## SIGN IN



The screenshot shows the 'Sign In' page for Green4 Solutions. At the top left is the 'green4 SOLUTIONS' logo, and at the top right are flags for the United Kingdom and France. Below the logo is a grey box with the text 'Login to continue'. The main form area contains two steps:

1. What is your email address?  
 An input field labeled 'Email address' is shown with a red 'X' icon to its right, indicating a validation error.
2. Do you know your password?  
 There are two radio button options:
  - ☒ Yes, here is my password:  
 Below this is a 'Password' input field, also marked with a red 'X' icon.
  - ☐ No, please send me a temporary access link.

Below the second step, there is a link: 'Forgotten password? Select no above.' A large green button labeled 'Sign In Securely' is positioned below the form. At the bottom of the page, there is a link 'Don't have an account? Sign up here.' and a section for social login: 'Or sign in with Facebook' next to a blue 'Login' button with the Facebook logo.

The sign in page will allow users to Log into the Portal. This can be done by entering their Email Address and Password. The green **Sign In Securely** button can then be used to log the user into the Portal.

If the User does not have a password or has forgotten their Password the flag entitled **No, please send me a temporary access link** can be selected. A First Name and Last Name field will drop down, the appropriate names should be entered before the green **Request Temporary Access** button is selected.

green4 SOLUTIONS

Login to continue

1. What is your email address?

Email address X

2. Do you know your password?

☐ Yes, here is my password:

Password

☒ No, please send me a temporary access link.

First name:

First name X

Last name:

Last name X


Request Temporary Access

If no account has been created previously the **Don't have an account? Sign up here** link can be selected to access the [Sign Up](#) screen.

It is also possible to Sign in with Facebook to access the Portal. Choose the blue Facebook Login button to do this.

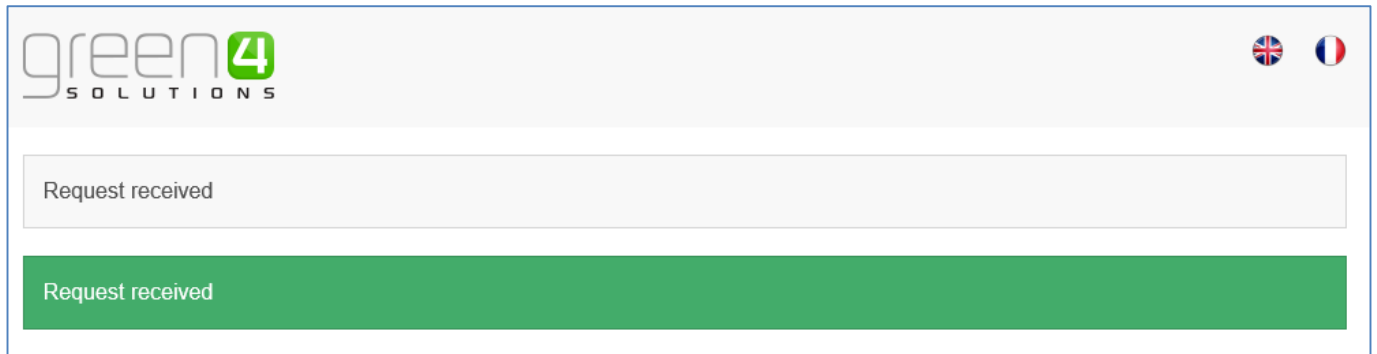
Don't have an account? [Sign up here.](#)

Or sign in with Facebook




 Login

## TEMPORARY ACCESS

If a Temporary Access Link is requested the user will be directed to the Request Received page of the portal as is shown below, this will fire a new communication which will allow the user to set a new password.



The Temporary Access Link that a user receives will require them to enter a new Password before confirming it. After completing these the green Create Password button can be selected, this will save the password and load the portals [Details](#) screen.

Subscription Activated

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam at porttitor sem. Aliquam erat volutpat. Donec placerat nisl magna, et faucibus arcu condimentum sed.

Password

Password must contain at least 8 characters.

X

Confirm password

X

Create password

## MANAGING SUBSCRIPTIONS

Subscriptions are managed via the use of Marketing Lists within CRM, contacts who are part of Marketing List that have the flag **Is Subscription** set to **Yes**, will be automatically subscribed to the email campaign, this flag is highlighted below in a Marketing List form.

Microsoft Dynamics CRM
MARKETING
Marketing Lists
Newsletters

NEW
DEACTIVATE
DELETE
MANAGE MEMBERS
ASSIGN
SHARE
EMAIL A LINK

MARKETING LIST

# Newsletters

## Summary

### Information

Name	Newsletters
List Type	Static
Purpose	--
Targeted At	Contact
Source	--
Currency	Pound Sterling
Modified On	18/06/2015 15:46
Cost	--
Last Used On	--
Locked	No
Owner	System Administrator
Description	--

### Members




Full Name	Business Phone
Adam Smith	
Joe walker	

Is Subscription

Yes

Within the Communication Portal it is possible for users to manage these subscriptions. Managing subscriptions does not require the user to log into the Portal so they can easily unsubscribe from any communication campaigns that they do not wish to be part off.



Manage subscriptions

### Manage subscriptions

☒ Newsletters
 ☐ Promotions
 ☐ Events
 ☐ Special Offers

Update


Or [Unsubscribe completely](#)



To manage the subscriptions, either place a tick in the box next to the name of the Subscription to subscribe or untick the box next to the subscription to unsubscribe.

Upon making any changes to the subscriptions the green **Update** button should be selected.

Alternatively, to unsubscribe from all subscriptions, select the **Unsubscribe Completely** button at the bottom of the Manage Subscriptions page. If this option is selected, it is still possible to re-subscribe in the Manage Subscriptions area of the portal by placing a tick in the relevant subscription boxes before clicking Update.

## UPDATE DETAILS



[Manage subscriptions](#)
[Your details](#)
[Logout](#)

Your details

**Manage details text** - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam at porttitor sem. Aliquam erat volutpat. Donec placerat nisl magna, et faucibus arcu condimentum sed.

Customer Reference	DB68	E-mail	joe.walker@green4solutions.c	Address 1: ZIP/Postal Code	la11sh	Lookup
Salutation	Mr	Mobile Phone	078141783323	Address 1: Street 1	51 Regent Street	
First Name	Joe	Home Phone	0118288478	Address 1: Street 2		
Last Name *	walker			Address 1: Street 3		
Birthday	17/02/2015			Address 1: City	Lancaster	
				Address 1: County	Lancashire	
				Address 1: Country/Region	England	

Change password

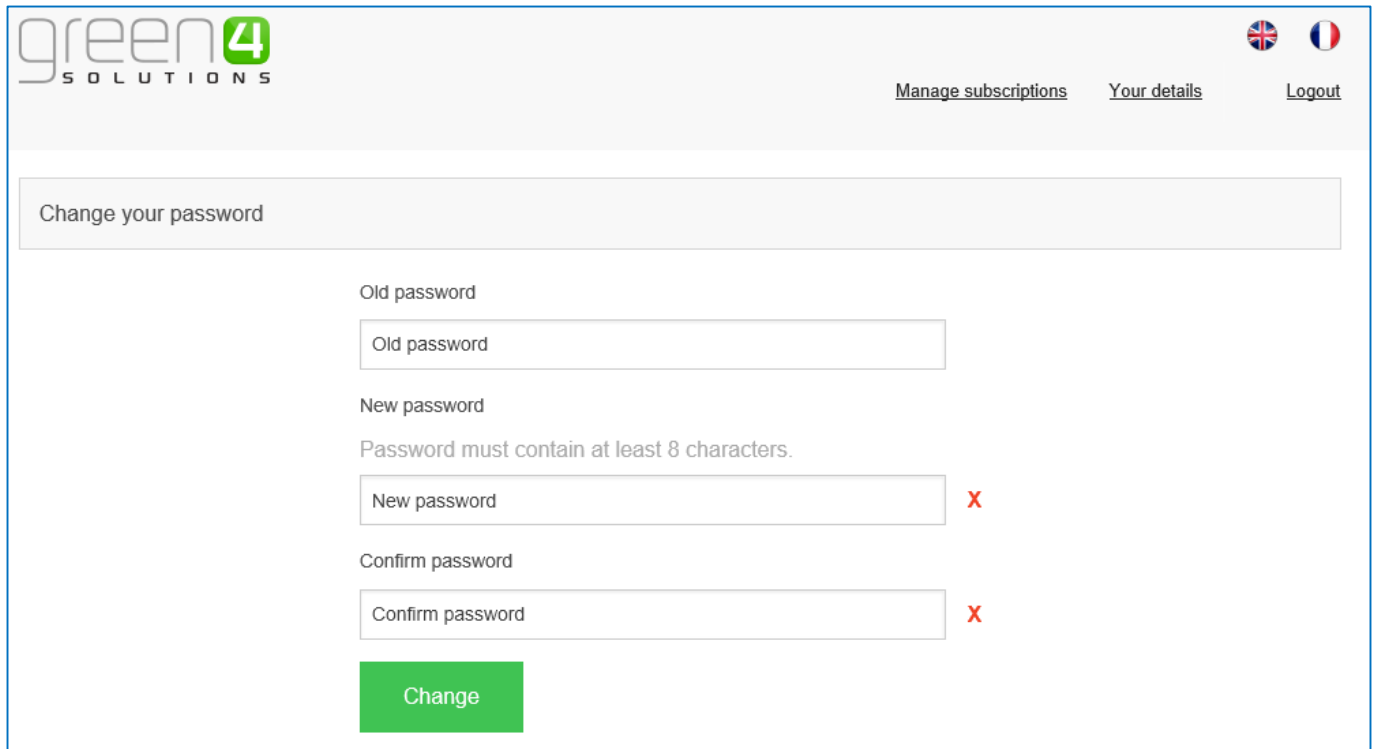
Update

For security purposes, before it is possible to update any details the user must [Sign In](#) to the portal. Upon signing in the users details will be displayed. Here it is possible for the following details to be updated, these will also update in the Contact form that is found within CRM.

- **Customer Reference** (This field cannot be updated)
- **Salutation**
- **First Name**
- **Last Name\***
- **Birthday**
- **E-mail**
- **Mobile Phone**
- **Home Phone**
- **Address 1: ZIP/Postal Code**
- **Address 1: Street 1**
- **Address 1: Street 2**
- **Address 1: Street 3**
- **Address 1: City**
- **Address 1: County**
- **Address 1: Country/Region**

If any details are updated or changed, the green Update button must be selected.

It is also possible for the user to change their password within the Your details screen. This can be done by selecting **Change Password**, which will open a new page where the users' old password and new password can be entered before being confirmed by selecting the green **Change** button.



green4go  
SOLUTIONS

[Manage subscriptions](#) [Your details](#) [Logout](#)

Change your password

Old password

Old password

New password

Password must contain at least 8 characters.

New password X

Confirm password

Confirm password X

Change

**Note.** It is possible to translate the Portal by selecting the relevant flag in the top right hand corner of each page.



**\*END OF DOCUMENT\***