The Customer Spot v1.1 Release Notes

1. New Features

- Set up different views for different types of The Customer Spot (TCS) users
  - Allows you to set up different types of portal users with different access levels to the various functions
  - Allows multiple TCS users to be granted TCS administrator access
  - Sets the stage for us to add functionality for other types of portal users in future releases
  - Please note that this change will impact how you activate TCS users moving forward. In addition to setting the contact to an active TCS user, you will need to apply a TCS Role in order from them be able to do anything when they log in.
  - See the documentation on TCS Views and TCS Roles for more information.
- Ability to view full case history in TCS portal
  - When viewing a case in TCS, users can now see Calls, Meetings, Tasks, and Emails in addition to Notes
  - In Sugar, Calls, Meetings, and Tasks have a "Portal Viewable" flag to set whether TCS users can see each record in the portal and allow for internal-only activities
- TCS Admin users will need to accept our License agreement on their first/next login. TCS Admin users will not be allowed to log in without accepting the agreement.
- Addition of an About page, so you can check what version of the product you are using
- Error notifications are now sent to TAI team via email so that we can identify and resolve issues more quickly

2. Enhancements

- Search box for searching case subjects was moved next to search by status and now also searches case descriptions.
- KB & FAQ search now searches the body of articles, not just the title.
- When a case is created in the portal, the case record in Sugar is related to the Contact who created the case so that you can see which portal user created it.
- When a TCS user creates a case, they now have the ability to immediately add an attachment, instead of having to do it as a second step.
- The TCS user profile screen now includes a password reset tool.

3. Fixes

- We fixed some problems with the Reset password link. So you can now reset your password without any issues!
- FAQs without an expiration date were not showing up in the portal as expected. Now they will.

- Downloading attachments in the portal had some intermittent issues due to a file naming convention. We've updated the naming convention, so you can now download attachments without any issues.
- We no longer try to send an activation email for a portal user without an email address. We wait until an email address is added before trying to activate the account.
- If a user with admin rights had a session time out, clicking the admin link generated an error message instead of redirecting to the login page. You will now be redirected to the login page instead.
- An images directory is now created automatically when a new portal is deployed so that you won't get an error the first time you try to add your logos.

4. Known Issues

- Email attachments are not included in case history.
- Embedded images in emails are not included in case history.
- Sugar Admin should not update records in the TCS Views module. We are currently setting these records as read-only via a Sugar role, which does not impact system administrators.