

Service Portal Fundamentals Training

COURSE CONTENT

GET IN TOUCH



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About Multisoft

Train yourself with the best and develop valuable in-demand skills with Multisoft Systems. A leading certification training provider, Multisoft collaborates with top technologies to bring world-class one-on-one and certification trainings. With the goal to empower professionals and business across the globe, we offer more than 1500 training courses, which are delivered by Multisoft's global subject matter experts. We offer tailored corporate training; project Based Training, comprehensive learning solution with lifetime e-learning access, after training support and globally recognized training certificates.

About Course

The Service Portal Fundamentals Training offered by Multisoft Systems is designed to equip IT professionals with the expertise needed to build, customize, and manage service portals effectively. This comprehensive course covers the essential aspects of service portal configuration, including user interface design, widget creation, and workflow integration.

Module 1: Service Portal Review

- ✓ Define Service Portal
- ✓ Discuss reasons for building a Service Portal
- ✓ Review Service Portal administration and development duties
- ✓ Explore the Branding Editor
- ✓ Examine where to get Service Portal help

Module 2: Create a Service Portal

- ✓ Learn how to create a new Theme, a new Portal, and a new Page.
- ✓ Review the Service Portal framework
- ✓ Create a new Theme
- ✓ Create a new Service Portal
- ✓ Create a new Page
- ✓ Review the Bootstrap framework
- ✓ Explore baseline Page

Module 3: Widgets

- ✓ Learn how to use Widgets on a Page to provide your content. This module also includes a low-code overview on how to create a new Widget.
- ✓ Define Widgets and explore the baseline elements
- ✓ Learn how to use Widgets
- ✓ Clone existing Widgets
- ✓ Develop new Widgets
- ✓ Widget debugging

Module 4: Header Menus

- ✓ Learn how to create a new Menu and how to include it in a Service Portal.
- ✓ Define a Header Menu
- ✓ Explore Menu Items

- ✓ Discuss nested Menu Items
- ✓ Review testing Menu functionality

Module 5: Search Sources

- ✓ Learn about the sources for Portal searches.
- ✓ Define Contextual Search
- ✓ Define Search Sources
- ✓ Learn how to set Portal Search Sources
- ✓ Learn about Pagination and Search Facets
- ✓ Review creating new Search Sources
- ✓ Explore external Search Sources

Module 6: Service Portal Extras

- ✓ Learn about Announcements, the Service Portal Log Entries table, the Usage Overview dashboard, using User Criteria records to control user access within a portal, and Guided Tours.
- ✓ Learn about the Announcements Widget
- ✓ Explore Page Route Maps
- ✓ Review Service Portal transaction logging and reporting
- ✓ Discuss use of User Criteria records to control user access in a portal
- ✓ Explore Guided Tours for Service Portals

Module 7: Redirecting in Service Portal

- ✓ Learn a variety of options you can configure to redirect users to a Service Portal and to specific pages.
- ✓ Review available features that enable redirecting within a Service Portal
- ✓ Page Route Maps
- ✓ Login, redirect, and SSO