PeopleSoft 8 Customer Portal SP2 PeopleBook

PeopleSoft 8 Customer Portal SP2 PeopleBook

SKU MAWCr8SP2B 1200

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Printed in the United States of America.

Contents

About This PeopleBook

The book provides you with the information that you need to implement and use PeopleSoft Customer Portal. You can order the online version by requesting SKU PSB8SP2R0, or the hard-copy version by requesting SKU MAWCr8SP2B 1200.

This section describes information that you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft Portal Solutions product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume that you already know how to navigate around the PeopleSoft system, much of the information in this book is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information that you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. This book expands on the material covered in PeopleSoft training classes.

PeopleSoft Portals Application Fundamentals

PeopleSoft Portals Application Fundamentals covers important topics that apply to many or all PeopleSoft applications across the PeopleSoft Portal Solutions product line. Whether you are implementing only PeopleSoft Customer Portal, some combination of products within the product line (for example, PeopleSoft Supplier Portal, Employee Portal, Enterprise Portal, Campus Portal, and Government Portal), or the entire PeopleSoft Portal Solutions, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as understanding and administering pagelets.

In the *PeopleSoft Portals Application Fundamentals* PeopleBook, we discuss common information pertinent to all applications in the PeopleSoft Portal Solutions product line. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Portals Application Fundamentals* and to other PeopleBooks.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www.peoplesoft.com). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection web site: http://www.peoplesoft.com/

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM PeopleSoft 8 Portal Solutions SP2, SKU PSB8SP2R0.

Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

The CD includes the following PeopleBooks (presented in HTML format) that you can print in whole or in part:

- PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook
- PeopleSoft 8 Campus Portal SP2 PeopleBook
- PeopleSoft 8 Enterprise Portal SP2 PeopleBook
- PeopleSoft 8 Government Portal SP2 PeopleBook
- PeopleSoft 8 Customer Portal SP2 PeopleBook

- PeopleSoft 8 Employee Portal SP2 PeopleBook
- PeopleSoft 8 Supplier Portal SP2 PeopleBook
- PeopleSoft 8 Enterprise Integration SP2 PeopleBook
- PeopleTools 8.12 PeopleBook
- Using PeopleBooks
- Using PeopleSoft Applications PeopleBook

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet	From the main PeopleSoft internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order. PeopleSoft internet site: http://www.peoplesoft.com/.
Telephone	Contact Consolidated Publishing Incorporated (CPI) at 800 888 3559.
Email	Email CPI at **callcenter@conpub.com**.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`	Indicates a code example.
Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold).

Cross-references	The phrase "For more information" indicates where you can find additional documentation on the topic at hand. • Capitalized titles in *italics* indicate the title of another PeopleBook. For example: For more information about billing, see *PeopleSoft 8.00.01 Billing PeopleBook.* • Capitalized titles in *italics* followed by chapter title in quotes refer to a chapter in another PeopleBook. For example: For more information about establishing rate templates, see *PeopleSoft 8.00.01 Projects PeopleBook,* "Integrating With PeopleSoft Billing and PeopleSoft Contracts". • Capitalized titles in quotes refer to another chapter of this PeopleBook. For example: For more information about contract status security, see "Securing Your PeopleSoft Contracts System". • Capitalized titles refer to sections within this chapter of this PeopleBook. For example: For more information about Defining Contract Statuses, see Defining Your Own Contract Statuses.
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0,* not the letter *O.*
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.

We use a table to introduce the documentation of all pages. You'll find the following information in these tables.

Usage	The reason you would use the page.

Object Name	The system name for this page. You can find a page's object name by right-clicking on the page itself (the middle of the frame) and selecting **View Source.** The HTML code for that page appears. You'll find the page's object name in the string that begins with the word Page. For example, in the string, Page: JOB_DATA1, the page's object name is JOB_DATA1. You can also see the component name and the menu name. For example: Page:PO_LINE Component:PURCHASE_ORDER Menu:MANAGE_PURCHASE_ORDERS
Navigation	How to get to this page.
Prerequisites	Pages where you must enter data in order to have the appropriate information default to this page.
Access Requirements	The keys you must enter in order to access the page or component.

Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates For more information cross-references to related or additional information.

Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed, about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Customer Portal Product Documentation Manager
PeopleSoft, Inc.
4460 Hacienda Drive
Pleasanton, CA 94588

Or send comments by email to the authors of PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

Introducing PeopleSoft Customer Portal

Before the advent of PeopleSoft Customer Portal, our customers accessed corporate websites and interacted with customer service representatives to find information relevant to their relationship with a company.

Now, with PeopleSoft Customer Portal, finding information is simpler. Your customers have one central place for business transactions and real-time access to customer support. As a result, PeopleSoft Customer Portal is a place where you can manage the relationships with your customers by providing a personalized customer facing self-service solution.

Based on PeopleSoft Enterprise Portal tools and architecture, PeopleSoft Customer Portal enables:

- Single sign-on for all applications.
- Application integration.
- Common navigation.
- Role- and row-level security.
- The ability to register content.
- Personalization of content based on customer role, customer attributes, customer segmentation, or even purchasing history.
  - With our rules-based roles we provide the ability to perform one-to-one marketing by suggesting collateral products, providing advance notice of new product and service features, product catalogs, or targeted pricing and promotions.

Looking at PeopleSoft Customer Portal

PeopleSoft Customer Portal is a separate application that functions as a single point of entry to PeopleSoft products as well as to non-PeopleSoft applications.

Among its features, PeopleSoft Customer Portal includes an intuitive navigational hierarchy based on preconfigured PeopleSoft customer self-service transactions. There are also application data-dependent pagelets, which enable customers to view summarized information relevant to their relationship with your company. Moreover, the portal homepage can display external content pagelets such as industry news, stock quotes, and weather reports.

For more information about external content pagelets, see ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,*** **"Working With News Feeds From the Internet"**.

Single Sign On

Customer Portal uses a single sign-on so your customers can easily navigate to each of the applications without having to log in and log out of separate applications.

After PeopleSoft Customer Portal authenticates a user after logging in, PeopleSoft delivers a web browser cookie containing an authentication token. PeopleSoft security technology uses web browser cookies to store unique access tokens for all users after they are initially authenticated. When a user connects to a PeopleSoft application within PeopleSoft Customer Portal, the application server uses the token in the browser cookie to re-authenticate that user behind the scenes so that another sign-on is not required.

For more information about portal security, see Understanding PeopleSoft Security in the security documentation.

Once users are set up, they can change their user ID and password from the User Profile link on the Customer Portal homepage.

Preconfigured Taxonomy

Depending on the PeopleSoft applications that you have installed, you encounter a prepackaged, intuitive navigation hierarchy. The highest level of the hierarchy lists the products within Customer Portal. The products include the following:

- PeopleSoft eStore
- PeopleSoft eBill Payment
- PeopleSoft eService

Each product contains additional drill-down navigation. For PeopleSoft eStore and PeopleSoft eBill Payment, you can also navigate to key information without first going to the application homepage.

PeopleSoft Customer Portal also delivers the following portal objects:

- User Profile
- Contact Us
- Customer Selection

You must have either PeopleSoft eStore or eBill Payment installed in order to receive the portal objects listed above.

PeopleSoft Customer Portal Pagelets

Application data-dependent pagelets are used with PeopleSoft Customer Portal so that your customers can conveniently access information relevant to their role with your company. These pagelets display summarized information within a small rectangular area on the homepage. You can view the following pagelets in PeopleSoft Customer Portal:

- Recent Bills
- Recent Consolidated Bills
- Contact Directory
- Account Balance
- Shopping Cart
- Product Search
- Promotions
- Recent Orders
- Recent Quotes
- Company News
- Company Events

For more information about the application pagelets, see ***PeopleSoft 8.00.01 Customer Portal PeopleBook*, "Understanding the PeopleSoft Customer Portal Elements"**.

Personalized Content

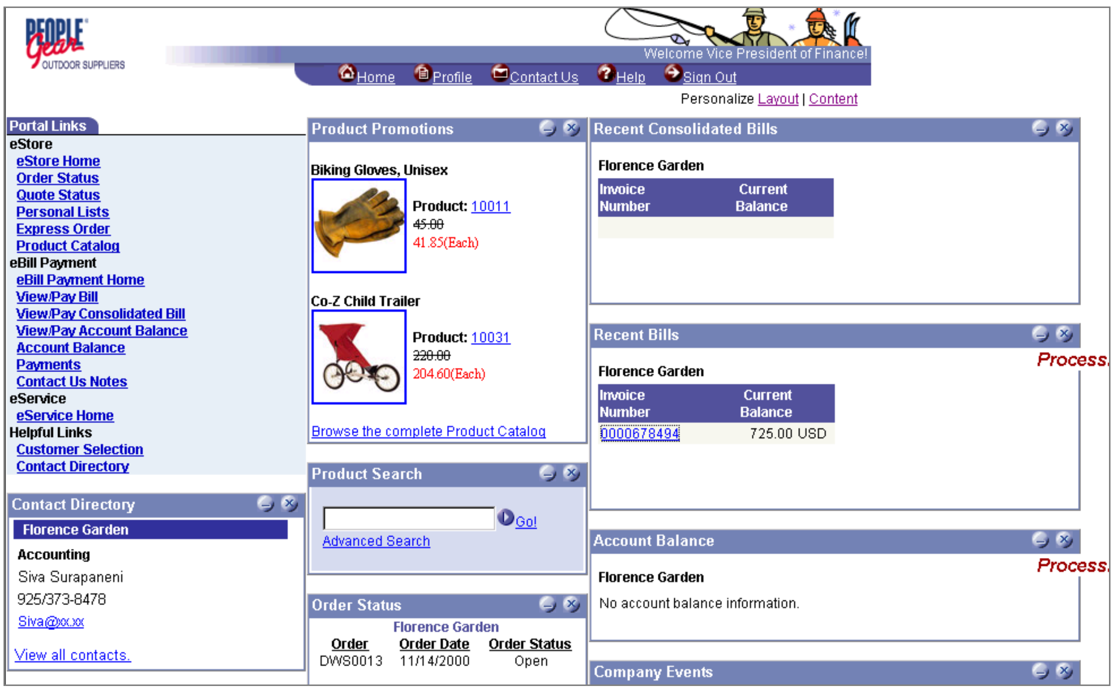
One of the key features of PeopleSoft Customer Portal is the ability to tie buying patterns with roles so you can target news, events, and email marketing to your customers. You first create the role, and then you assign attributes and run a query. The process creates a list of users who match your buying and customer criteria. They will see news and events that are specifically targeted to them. You can also set up email marketing campaigns to this group of users.

For more information about personalizing PeopleSoft Customer Portal, see ***PeopleSoft 8.00.01 Customer Portal PeopleBook*****, "Personalizing the PeopleSoft Customer Portal"**.

CHAPTER 2

Understanding PeopleSoft Customer Portal Elements

We provide a sample portal website, PeopleGear, with your PeopleSoft Customer Portal installation as an example of how the application can be used. You use this as a template for developing your own Customer Portal website. This chapter describes the elements provided with Customer Portal.



An example of the PeopleSoft Customer Portal homepage

Standard PeopleSoft Customer Portal Template Elements

This section defines the standard elements of Customer Portal.

Navigation Header

The navigation header at the top of every page contains links to the maintenance and communication components of PeopleSoft Customer Portal.

Home — The Home link transfers all users to the PeopleSoft Customer Portal homepage.

Profile — The Profile link transfers users to the **User Profile Page**.

Note. The Profile link is available if you have either PeopleSoft eStore or eBill Payment installed.

Contact Us — The Contact Us link transfers all users to the **Contact Us Page**, where they can send email messages to your internal contacts.

Note. The Profile link is available if you have either PeopleSoft eStore or eBill Payment installed.

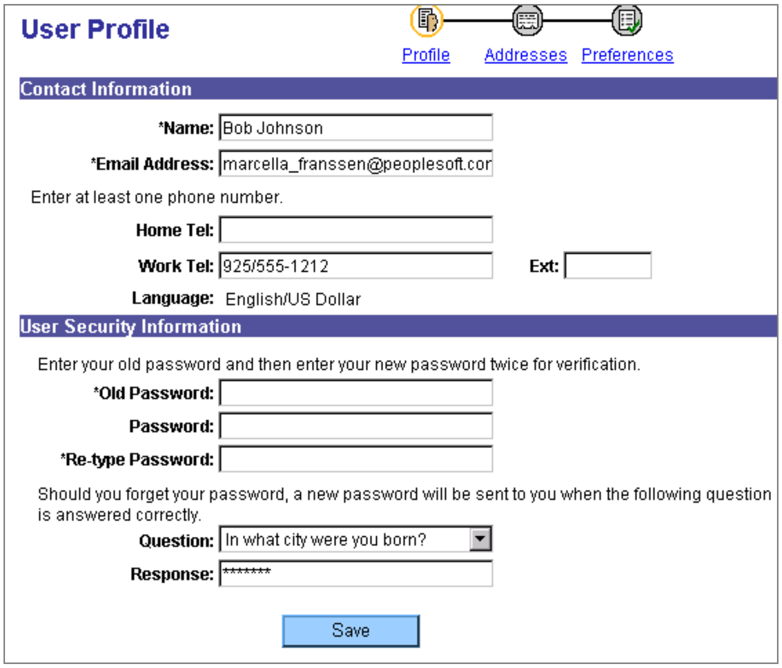
Help — The Help link opens Customer Portal Help in a separate browser window.

For more information about configuring help pages, see **Setting Up End-User Help for Customer Portal**.

Sign Out — The Sign Out link ends the user's session.

User Profile Page

Usage	Customers can use the User Profile page to maintain user profile information such as security and address information.
Object Name	WC_PROFILE
Prerequisites	You must have either PeopleSoft eStore or eBill Payment installed.



User Profile page

Contact Information

The customer **Name** entered here appears on all printed materials (invoices, shipping labels, and so on), as well as in the personalized greeting message that is displayed on each web page.

The **Email Address** field is required for verification of identity when maintaining user profile information, and for communication purposes.

At least one telephone number is required for credit card processing; CyberSource requires the **Home Tel** (home telephone) or **Work Tel/Ext** (work telephone/extension) numbers for credit card processing. A minimum of 6 and a maximum of 16 numbers or alphabetic characters (uppercase or lowercase) are allowed.

The customer's preferred **Language** appears.

User Security Information

The **User ID** and its corresponding **Password** serve as the main identifiers to access the PeopleSoft system. Passwords and user IDs are case-sensitive.

For more information about system security, see Understanding PeopleSoft Security in the security documentation.

Sometimes your customers may forget their passwords and be unable to sign into your website. Customers can have new passwords generated and sent to them by email automatically. To prove their identify, customers must answer one personal **Question** (birthplace, mother's maiden name, and so on). Customers who forget their passwords and either have not set up password questions or cannot remember the correct **Response** can send you a message using the **Contact Us Page** of your website.

Click the **Save** button to validate the changes.

User Profile - Addresses Page

Usage	The User Profile - Addresses page displays the existing address nicknames and addresses defined for the customer.
Object Name	WC_ADDRESS_BOOK
Navigation	Click the Addresses link on the User Profile page.
Prerequisites	You must have either PeopleSoft eStore or eBill Payment installed.

User Profile - Addresses page

Customers can create additional address records for their account by clicking the **Add a new address** link and moving to the **User Profile - Addresses Page**.

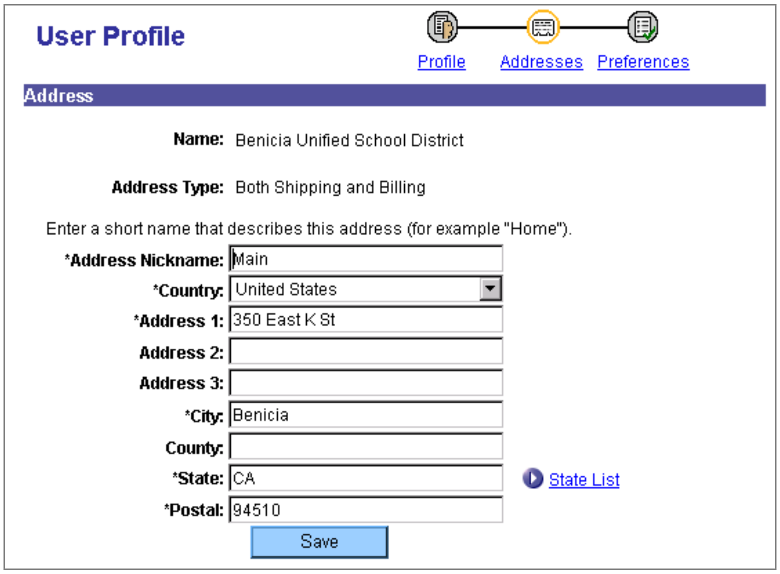
All of the selected customer's addresses are displayed for inquiry purposes. These addresses include the sequenced addresses for the selected bill to or sold to customer and (if the customer selected is a sold to customer) any associated addresses for the sold to customer.

The customer's address nickname is displayed as a hyperlink value when the Maintain Addresses check box is selected on the Contact User Profile Page. Clicking this link takes customers to the User Profile - Address page in update mode, where they can edit the existing information. If the Maintain Addresses check box is *not* selected on the contact customer table, the address nickname is for display only and can't be updated.

User Profile - Address Page

Usage	Users can use the User Profile - Address Page to change their primary address or add a new address.
Object Name	WS_ADDRESS

Navigation	Click the Profile link on the Customer Portal homepage.
Prerequisites	You must have either PeopleSoft eStore or eBill Payment installed.



User Profile - Address Page in update mode

The customer can enter a **Name** and select an **Address Type** when adding new address information. When updating an existing address record, these fields are for display only.

Customers can identify their addresses by assigning them an **Address Nickname,** which appears on the **User Profile - Addresses Page** as a hyperlink value. Address nicknames also default to the Ship To Address field on the Delivery Options Page and the Bill To Address field on the Billing Options Page when the customer is checking out in PeopleSoft eStore.

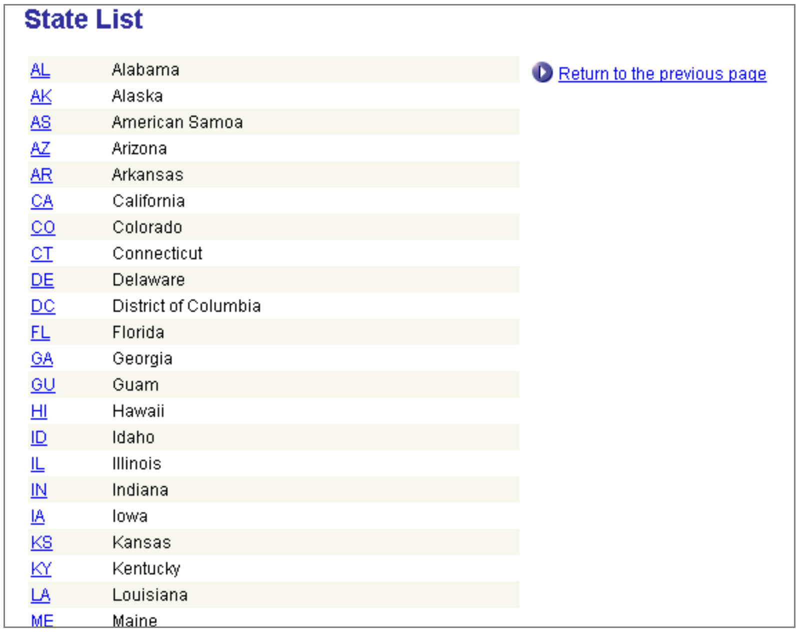
Some of the address fields are conditional, controlled by the **Country** selection. This determines which fields are required and controls the format for the **State** field and **State List** link. For example, when the customer selects ***Great Britain,*** the **State** field disappears and **State List** becomes **County List.** You control these conditions using the Country – Address Format Page in the General Options menu. The following fields are required if they are available for the format of the selected **Country: Nickname,** at least one of the address lines, **Country, State, City,** and **Postal** code.

The **Postal** code field format is validated when the selected country is ***USA, Belgium, France, Japan, Canada, Great Britain, the Netherlands, Italy,*** or ***Switzerland.*** In addition, if Vertex or Taxware is installed, the system verifies that the specific address—in other words, the combination of address fields—actually exists.

State List Page

Usage	Customers can use the State List page to select the appropriate state (or province, county, and so forth) for the address record they are creating.
Object Name	WS_STATES

Navigation	Click the State List link on the User Profile - Address page.
Prerequisites	You must have either PeopleSoft eStore or eBill Payment installed.



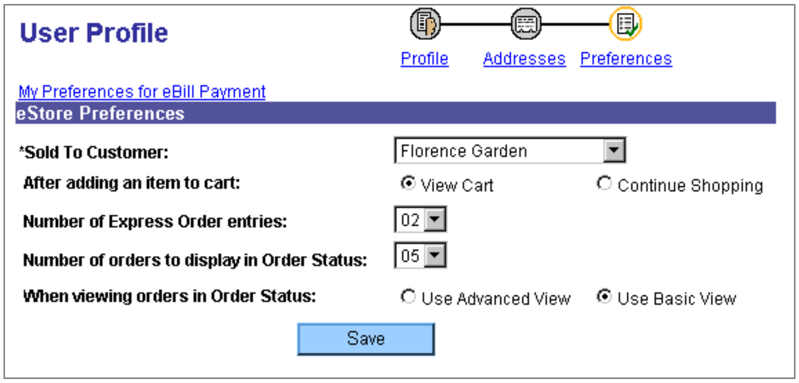
State List page

The Country selection made on the **User Profile - Addresses Page** determines the name and content of this page. For example, a selection of *Great Britain* changes the State List label to *County List* and displays a list of county abbreviations.

When selected, the abbreviations populate the appropriate field (State, Province, and so on) on the User Profile - Address Page with that particular value.

User Profile - eStore Preferences Page

Usage	The User Profile - eStore Preferences page enables users to define page appearance and system behavior settings for PeopleSoft eStore.
Object Name	WC_PREFERENCE
Prerequisites	You must have PeopleSoft eStore or eBill Payment installed to use User Profile Preferences.
Navigation	Click Preferences on the User Profile page.



User Profile - eStore Preferences page

If your installation includes PeopleSoft eStore, the eStore Preferences page appears first. If PeopleSoft eBill Payment is also installed, **My Preferences for eBill Payment** displays as a hyperlink so that the user can set up preferences for eBill Payment. If only eBill Payment is installed, the eBill Payment Preferences page appears upon clicking the Preferences icon.

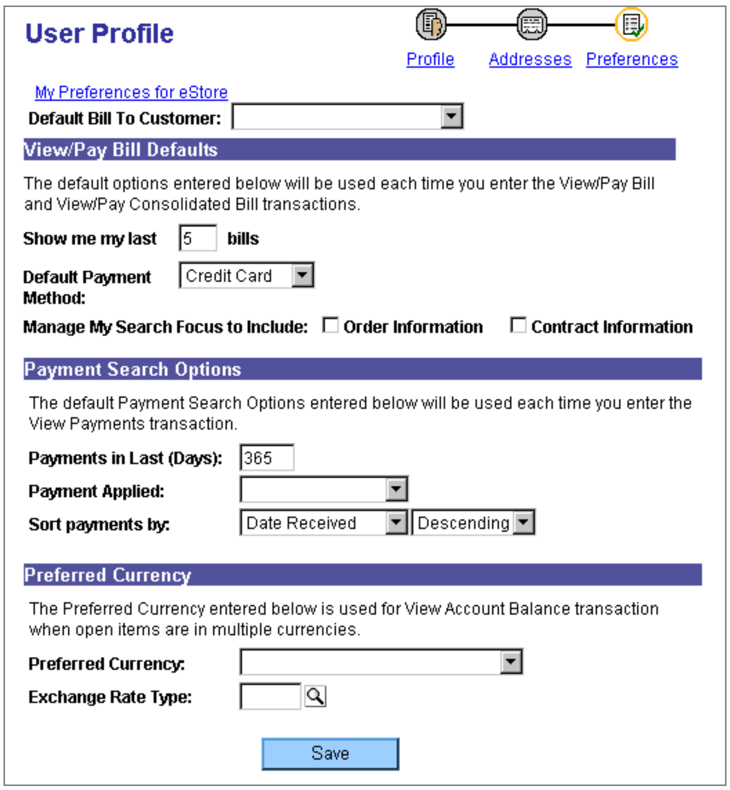
Your customers can personalize your website to suit their needs. They can accept system defaults or change the following settings.

Sold To Customer	This option enables multiple-customer contacts to select which sold to customer account they access upon logging in. The default is either the first in the list or the eStore Default Customer selected on the Contact User Profile Page. **Note.** This field displays only if you represent multiple sold to customers.
After adding an item to cart	Your customers can view their shopping cart after adding items or remain on the page from which they select products.
Number of Express Order entries	Your customers can select the number of express order entry lines that the system provides on a single Express Order page, from ***1*** to ***20.*** Customers can define as many express order entries as needed over multiple pages.
Number of orders to display in Order Status	Your customers can select the number of orders that the system displays on a single Order Status page, from ***1*** to ***20.***
When viewing orders in Order Status	Customers can search for orders in advanced mode or basic mode on the Order Status Page. Selecting **Use Advanced View** enables customers to search for products by purchase order number and product ID, and to view the purchase order numbers and product IDs of the products found.

Click **Save** to save the settings.

User Profile - eBill Payment Preferences Page

Usage	The User Profile - eBill Payment Preferences page enables users to define page appearance and system behavior settings for PeopleSoft eBill Payment.
Object Name	WC_PREFERENCE_EB
Prerequisites	You must have either PeopleSoft eBill Payment or eStore installed to use User Profile Preferences.
Navigation	Click Preferences on the User Profile page.



User Profile - eBill Payment Preferences page

Select the **User Profile - eStore Preferences Page** link to change preferences for PeopleSoft eStore. This link appears only if PeopleSoft eStore is installed.

The **Default Bill To Customer** appears only for those users who represent multiple bill to customers. These users will be able to select the default bill to customer they wish to represent when they first log in.

View/Pay Bill Defaults

Your customers can use the **Show me my last bills** field to change the default number of invoices that appear on the View/Pay Bill - Bill List Page and the View/Pay Consolidated Bill – Bill List Page.

Your customers can change the **Default Payment Method** for this self-service transaction. The selected method defaults to the Payment Form Page.

The payment method default your customers select is used only for this self-service application. The selection here does not change the payment method value stored on the General Information - Payment Options page.

Your customers can select the **Order Information** check box to view and search by order number, contract number, and purchase order number. Additionally, customers can select the **Contract Information** check box to view and search by contract number, purchase order number, and project ID.

Payment Search Options

Your customer can use the **Payments in Last (Days)** to view payments made in a specified time period, such as the last 30 or 60 days. The default is 365 days.

Your customer can use **Payment Applied** to view payments that have been applied on the Account Balance and Payment pages. Your customer can select ***Yes*** to view only payments that have not been applied. Leaving **Payment Applied** blank enables the customer to search for both applied and unapplied payments.

Your customer can use the **Sort payments by** field to sort payment options in ***Ascending*** or ***Descending*** order. The available sort options are:

Date Received	Payments display sorted by the date the payment was received.
Payment Amount	Payments display sorted by the payment amount.
Payment Applied	Payments display sorted by payment applied status.
Payment ID	Payments display sorted by payment ID.

Preferred Currency Options

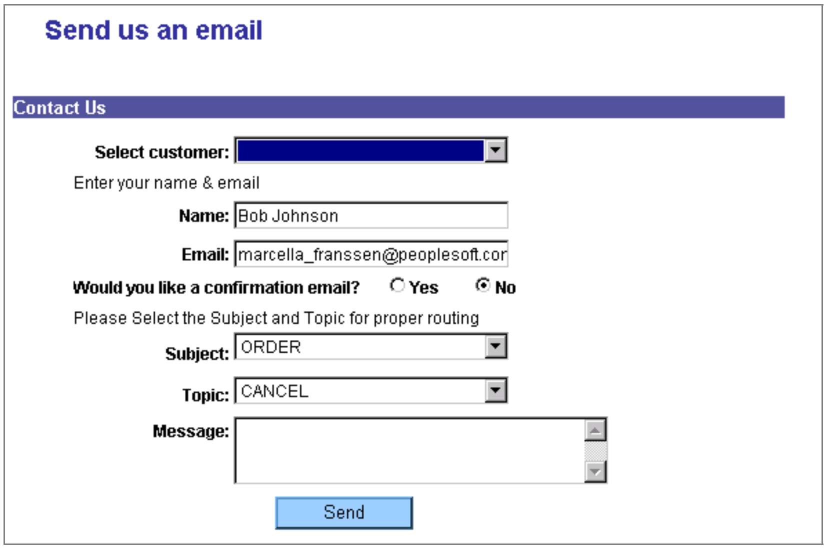
When an item is entered into Accounts Receivable, an entry currency is associated with the amount. This is the currency used to display the amounts on the Account Balance transaction by default. Since the Account Balance transaction shows the total amounts, if the total is made up of items with different entry currencies, it is meaningless. We offer an option to convert all amounts into one currency for display. The currency is used to display Account Balance transactions only.

Your customer should click the **Save** button to save the preferences.

Contact Us Page

Usage	Customers can use the Contact Us page to send emails to your organization.
Object Name	WS_CONTACT_US

Prerequisites	You must have either PeopleSoft eBill Payment or eStore installed to use Contact Us.



Contact Us page

The **Select customer** field is available for multiple-customer contacts to select the customer to whom the communication pertains. The communication is sent to your organization and will be routed based on the subject and topic. The existing contact's **Name** and **Email** are defaults from the contact record but can be overridden here.

All users can request a confirmation email, which is simply an email returned to them confirming that their correspondence has been received. Select predefined **Subject** and **Topic** options to route Contact Us emails to specific personnel in your organization.

The **Send** button initiates the Sendmail() function, which sends an email to the appropriate personnel in your organization. The system routes the email to all personnel who are associated with the role assigned to the Subject/Topic combination, and the CONTACTUS Application Engine program writes the information to the Conversation tables.

For more information about configuring Contact Us messages, see Setting Up Email Messages in the eStore documentation. For more information about setting up subjects and topics, see Preparing Subjects and Subject Topics for Conversations.

PeopleSoft Customer Portal Applications

Depending on the products that you have installed with PeopleSoft Customer Portal, you will be able to access various applications from the Customer Portal homepage.

eStore Links

If your installation includes PeopleSoft eStore, the eStore links transfer the user to the main transactional and inquiry components of PeopleSoft eStore.

For more information about PeopleSoft eStore links, see Understanding PeopleSoft eStore Elements.

eBill Payment Links

If your installation includes PeopleSoft eBill Payment, the eBill Payment links transfer the user to the main transactional and inquiry components of PeopleSoft eBill Payment.

For more information about PeopleSoft eBill Payment links, see PeopleSoft eBill Payment Self-Service Transactions.

eService Links

If your installation includes PeopleSoft eService, the eService link transfers the user to the eService application homepage. Single sign-on is maintained and a **Back to Portal** link is provided to navigate back to the customer portal homepage.

Using PeopleSoft eService, you can perform problem resolution, view warranty information, create and track service requests, and sign up for production and information subscriptions. You can also access a knowledge database for information, troubleshooting, and product search.

Helpful Links

The Help Links section makes it easier for your users to select the appropriate customer for their transactions and to contact the personnel in your organization quickly.

Customer Selection Page

Usage	Multiple-customer contacts use the Customer Selection page to select the appropriate customer for their transactions.
Object Name	WC_CUST_SELECTION
Prerequisites	The user must be defined as a multiple-customer contact using the Maintaining Contacts component.
Access Requirements	This page is accessible only to multiple-customer contacts. The customer selection link will not appear unless the user logging in is a multiple-customer contact.

Customer Selection page

When you click Customer Selection on the portal homepage, all sold to and bill to customers appear. A customer can be a bill to customer, sold to customer, or both. When you select a customer, you will see a message at the top of the page indicating that you are representing that customer. If the customer is only a sold to or a bill to customer, *billing customer only* or *selling customer only* displays next to the customer name.

If you represent more then one customer, you can set up either a sold to or bill to default customer on the User Profile - Preferences page. This customer will then be automatically selected for you. If you don't set up a default and you represent multiple customers, the first customer in the list will automatically be selected.

If you have selected a bill to only customer and you move to PeopleSoft eStore, the system will use the default sold to customer for eStore. Similarly, if you have selected a sold to only customer and you move to PeopleSoft eBill Payment, the system will use the default bill to customer.

Contact Directory Page

Usage	The Contact Directory page displays the contacts your customer uses within your organization.
Object Name	WC_CNTACT_DIR
Navigation	Click the Contact Directory link in Helpful Links. Click the View All Contacts link on the Contact Directory pagelet.
Prerequisites	The contacts must be set up as internal contacts in the Maintaining Contacts component. The following options must be set up for the contact to appear in the Contact Directory. Select internal contact in the Contact Flag field and enter an email ID on the Contact page. Select the customers represented by the internal contact on the Contact Cust page. Select a Contact Code and enter a business phone on the Contact Phone page.


Contact Directory

New World Outdoor Equipment, Inc.

Contact Type	Name	Telephone	Email
Human Resources	Alison Cavallo	340/321-3321	Alison_Cavallo@btlabs.com
Purchasing	Frank Law	609/478-2256	fl13@fidelissolutions.com

Western Pacific Wholesaler

Contact Type	Name	Telephone	Email
Purchasing	Frank Law	609/478-2256	fl13@fidelissolutions.com

Benicia Unified School District

Contact Type	Name	Telephone	Email
Purchasing	Frank Law	609/478-2256	fl13@fidelissolutions.com
Shipping Contact	Deanette Weiss	912/345-9990	Dt122@dt.com

Contact Directory page

All internal contacts for the user appear on the Contact Directory page. If the user represents more than one customer, the contacts appear under each customer name.

Users can select the **Letter** image to communicate with the appropriate contact by email.

The **Contact Type** from the Contact Code field on the Contact Phone Page appears.

The **Name** and **Email** from the Contact Page appear.

The **Telephone** number entered on the Contact Phone page appears. The phone must be a business-type phone.

Customer Portal Pagelets

We deliver pagelets to convey key information to your users about the customers they represent and the work they do with PeopleSoft Customer Portal. Users will be able to access pagelets only if their role is set up with permissions to access the pagelets. For example, a user who is responsible for placing orders should be assigned to a role that has permissions to view order status and search for products from PeopleSoft Customer Portal.

For more information about assigning roles to pagelets, see Roles in the security documentation.

The Contact Directory, Company News, and Company Events pagelets appear regardless of the applications that you have installed. The following table lists the other pagelets and the application that is needed.

Pagelet	***Application***
Recent Consolidated Bills	PeopleSoft eBill Payment
Recent Bills	PeopleSoft eBill Payment
Account Balance	PeopleSoft eBill Payment
Recent Quotes	PeopleSoft eStore
Product Search	PeopleSoft eStore
Shopping Cart	PeopleSoft eStore
Product Promotions	PeopleSoft eStore
Recent Orders	PeopleSoft eStore

Information in the pagelets on the Customer Portal home page are updated when the user refreshes the browser.

Contact Directory Pagelet

Usage	The Contact Directory pagelet displays the contacts that your customer uses within your organization. The contacts must be set up as internal contacts in the Maintaining Contacts component.
Object Name	WC_CNTACT_DIR
Navigation	**Customer Portal homepage** Define Business Rules, Maintain Customer Portal, Pagelets, Contact Directory

Contact Directory pagelet

If internal contacts are set up for the customer, they will appear if the customer has selected a default sold to customer on the **eStore Preferences page** or a default bill to customer on the

eBill Payment Preferences page. They will also appear if the user has selected a customer with **Customer Selection.**

Users representing multiple customers can click the **View all contacts** link to view all of their contacts.

For more information, see **Contact Directory Page**.

Company News Pagelet

Usage	The Company News pagelet displays any news you want to display to your PeopleSoft Customer Portal users.

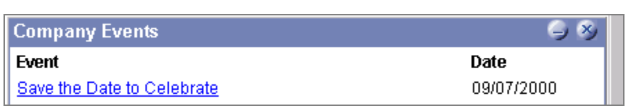
Company News pagelet

The Company News pagelet can display news, such as special offers, specific product descriptions, or new policies that you have for your customers. Company News can be associated with dynamic roles to create targeted news to reach a specific group of users. For example, you can assign dynamic roles to articles about new products or promotional campaigns for users who have bought a specific product or products from a product group.

For more information about creating dynamic roles, see ***PeopleSoft 8.00.01 Customer Portal PeopleBook,* "Personalizing the PeopleSoft Customer Portal"**. For more information about assigning roles to news, see ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,* "Using the Company News Pagelet"**.

Company Events Pagelet

Usage	The Company Events pagelet displays any events that you want to display to your PeopleSoft Customer Portal users.



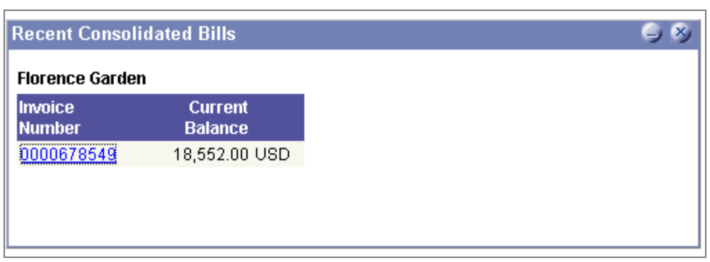
Company Events pagelet

The Company Events pagelet can display events such as company conferences or product demonstrations. Company Events can be associated with dynamic roles to create targeted events to reach a specific group of users. For example, you may be having a company event in a certain location and want to invite users from that area.

For more information about creating dynamic roles, see ***PeopleSoft 8.00.01 Customer Portal PeopleBook,* "Personalizing the PeopleSoft Customer Portal"**. For more information about assigning roles to events, see ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,* "Using the Company Events Pagelet"**.

Recent Consolidated Bills Pagelet

Usage	The Recent Consolidated Bills pagelet displays your customer's most recent consolidated invoices.
Object Name	WC_BILL_LIST_C_SS
Navigation	**Customer Portal homepage** Define Business Rules, Maintain Customer Portal, Pagelets, Most Recent Consolidated Bills



Recent Consolidated Bills pagelet

Click the **Invoice Number** link to access the View/Pay Consolidated Bill – Consolidated Bill Summary Page, where your customer can view details about the attached invoices and pay this consolidated bill.

Current Balance displays the total consolidated invoice amount, reduced by any previous or partial payments paid toward the bill or attached bills. The balance is calculated in PeopleSoft eBill Payment by summing the BAL_AMT value in the PS_ITEM table for each attached bill. If any of the attached bills have not previously had an item created in PeopleSoft Receivables, the default balance for that attached bill comes from the invoice amount of the attached bill.

Recent Bills Pagelet

Usage	The Recent Bills pagelet displays your customer's most recent invoices.

Object Name	WC_BILL_LIST_SS
Navigation	**Customer Portal homepage** Define Business Rules, Maintain Customer Portal, Pagelets, Most Recent Bills

Recent Bills Pagelet

Click the **Invoice Number** link to access the View/Pay Bill - Bill Summary Page, where you can review invoice details and pay the bill.

Current Balance displays the total amount of the invoice, reduced by any payments paid toward the invoice. The balance is calculated in PeopleSoft eBill Payment by summing the BAL_AMT value of all items for the invoice in the PS_ITEM table, reduced by any credit card payments in process. If the item has not been created in PeopleSoft Receivables, the default balance comes from the BI_HDR Invoice Amount field.

Account Balance Pagelet

Usage	The Account Balance pagelet displays information about your customer's aging history.
Object Name	WC_PE_ACCBAL_N
Navigation	**Customer Portal homepage** Define Business Rules, Maintain Customer Portal, Pagelets, Account Balance

Account Balance pagelet

The account **Credit Limit, Balance,** and **Overdue** amount are displayed for the customer.

Your customers can click the **Show All/Enhanced** link to navigate to the View/Pay Account Balance page, where they can view the account summary, recent activity, and aging account information.

For more information about the Account Balance page, see Inquiry on Account Balance and Status.

Quote Status Pagelet

Quote Status pagelet

The Quote Status pagelet includes the same elements as the **Order Status Pagelet**, with the following exception:

Quote Status	Clicking this link transfers customers to the Order Status Page, where they can search for a specific quote.

For more information about creating quotes in PeopleSoft eStore, see Shopping Cart Page.

Product Search Pagelet

Product Search pagelet

The Product Search pagelet contains the following elements:

Search field	Enables users to enter a search string (either a product description or product ID).

Go! Activates the search function.

Advanced search Clicking this link transfers users to the Product Search Page, where they can search for a given product ID, product description, price range, or product category.

Shopping Cart Pagelet

Shopping Cart pagelet

The Shopping Cart pagelet contains the following elements:

Products Displays the total number of products ordered.

Subtotal Displays the order subtotal and currency.

View cart Transfers the customer to the Shopping Cart Page. The Shopping Cart function executes the summarization of the data displayed.

Quick checkout Transfers the customer to the Order Summary Page, where they can either save the order as a quote or submit it as an order.

Validation processing determines whether the user has completed all of the steps required to submit an order. Requirements include having a populated cart, a shipping address, a billing address, and a payment method. If there are configured items in the cart, they must be configured before proceeding. If the customer is paying on terms and a purchase order is required, a purchase order must be entered. If a tax-exempt certificate is needed, the user is prompted. When validation fails for any steps, the user is transferred to the appropriate page to enter necessary data.

Checkout Clicking this button transfers customers to the Delivery Options Page, where they can modify the default shipping settings before proceeding to the Billing Options Page. Once billing options have been completed, the summary is displayed with the freight, tax, and totals for the order. Before customers navigate to the summary page, validation processing determines whether the order is complete (cart, configured items have been configured, purchase order provided if necessary, and so on).

Product Promotions Pagelet

Product Promotions pagelet

The **Promotions** label displays the category tree root node that you defined on the Category Tree Page.

The system selects two products at random—they must first be flagged for display on the Product Placement Tab of the Category Tree page—and displays them, along with their associated images (if available), with the following links:

Product ID	Transfers the customer to the Product Detail Page.
Browse the complete Product Catalog	Transfers the customer to the Personal Lists Page. The function is the same as that for the Catalog link on the eStore Menu pagelet.

If you have assigned both a list price and an MSRP (manufacturer's suggested retail price) to the product, the system displays these, with the greater value marked with a slash and the lower (accompanied by its associated display UOM [unit of measure]) in red text. If an order group applies, the lowest value of the net unit price, list price, or MSRP displays, and the next highest has a slash.

For more information about pricing, see Accessing Product and Price Information in eStore documentation.

Order Status Pagelet

Order Status pagelet

The Order Status pagelet includes the following elements:

Customer name	The customer name appears immediately upon sign in. If the user is a multiple-customer contact, the system displays either the first customer in the list or the default sold to customer defined on the Contact User Profile Page.
Number	The order number.
Date	The date the order was entered.
Status	The current order status.
Order Status	Clicking this link transfers customers to the Order Status Page, where they can search for a specific order.

CHAPTER 3

Personalizing PeopleSoft Customer Portal

You can control what your customers see on PeopleSoft Customer Portal by using a query with customer and order information and tying that query to a dynamic role to create a targeted group of users.

For example, you can use dynamic roles to do the following:

- Assign content such as news events and articles.

For more information about assigning roles to news and events, see ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,*** **"Using the Company News Pagelet"** and ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,*** **"Using the Company Events Pagelet"**.

- Support direct marketing through email promotions using PeopleSoft Workflow.

For more information about assigning roles to PeopleSoft Workflow to support email promotions, see Defining Roles and Users.

Working with Dynamic Roles

Once the dynamic roles are created using the **Role Definition Page**, the administrator must add the roles to the Maintain Roles List page in Portal Administration so the users who belong to the role can view news and events. Then the marketing personnel can assign the role to news and events in PeopleSoft Customer Portal content. By doing so, you can target news and events to your users. For example, you can assign dynamic roles to articles about new products or promotional campaigns for users who have bought a specific product or products from a product group.

For more information about creating and assigning roles to events, see ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,*** **"Using the Company Events Pagelet"**. For more information about creating and assigning roles to news, see ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,*** **"Using the Company News Pagelet"**.

The dynamic role functionality uses the ROLESYNCH_MSG application message to add users to a role based on role rules. You'll need to activate the ROLE_MAINT application message.

For more information about working with application messages, see Introduction to Application Messaging.

Defining Dynamic Roles

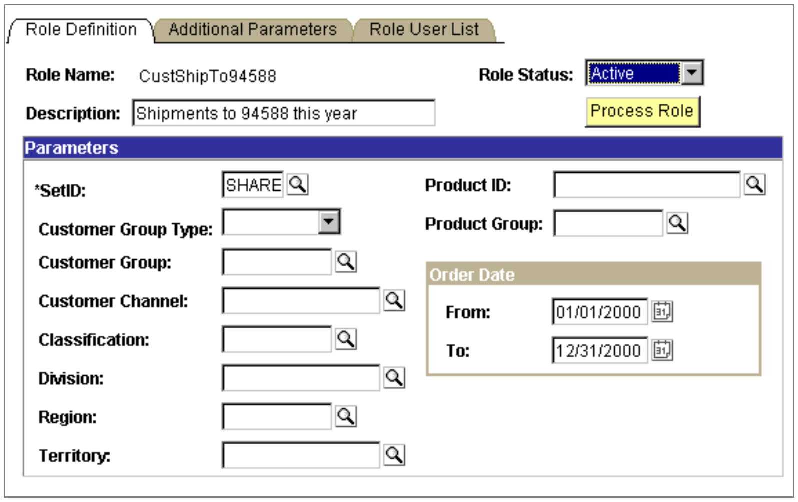
Your marketing personnel can assign customer, product, and buying information to dynamic roles in order to personalize news and events content for the PeopleSoft Customer Portal. On the **Role Definition Page**, they can select values for a static list of criteria for the query.

If they want to establish queries using additional parameters, your portal administrator can create queries for your marketing personnel using pages in the **Define Query menu**. Then the marketing personnel can assign values to the criteria using the **Additional Parameters Page**.

All of the users that are assigned to a role appear on the **Role User List Page**.

Role Definition Page

Usage	Use the Role Definition page to create or update a role and add conditions for the query. You can add values from a list of predefined query fields. A marketing person who is also responsible for the news and events content of PeopleSoft Customer Portal will typically use this page.
Object Name	WC_ROLE_DEFN
Navigation	**Customer Portal, Personalization, Define Dynamic Role, Role Definition** **Define Business Rules, Maintain Customer Portal, Use, Define Dynamic Role, Role Definition**
Access Requirements	Enter a Role Name.



Role Definition page

The **Role Name** and **Description** appear at the top of the page.

You can select any role in the security table that doesn't have dynamic security attributes for the query. Roles created using the Tools dynamic role assignment are not available for use in assigning Customer Portal personalization queries. We recommend that you add new roles or use existing roles that you have created for this functionality.

When adding a new **Role Name,** don't use special characters**.** You'll be able to save the new role, but the query won't be able to run for some special characters.

The query will run only when the **Status** is set to ***Active.***

You must select a **SetID** for the role definition. You can select from the available options for any of the following fields that you want to use in the query:

- Customer Fields
  - Customer Group Type
  - Customer Group
  - Customer Channel
  - Classification
  - Division
  - Region
  - Territory

- Product Fields
  - Product ID
  - Product Group
- Order Fields
  - Order Date Range

Keep in mind that you will be limiting the results of the query as you add more conditions.

Use the **Order Date** group box to select order dates for the query. You can select a **From** date, a **To** date, or both.

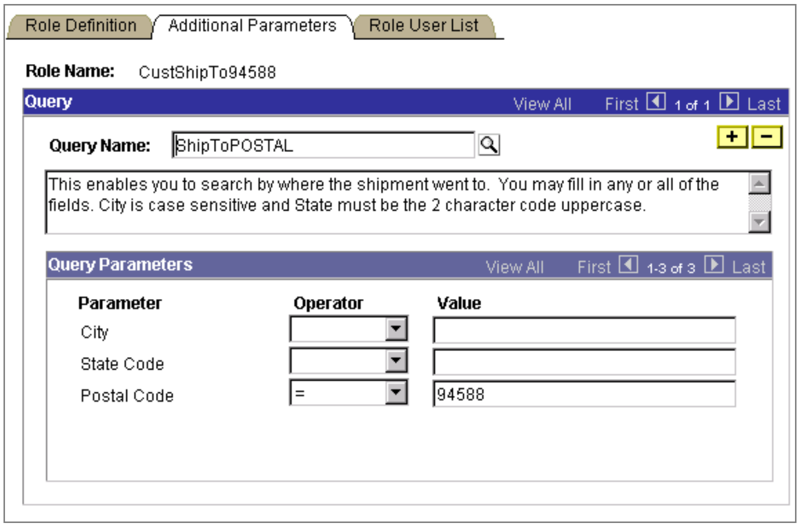
After clicking **Save**, click the **Process Role** button to run the query. When the query runs, it refreshes the list of dynamic users. Users from the previous query run are unassigned and the query now assigns the new users to the query results. The process may take a few moments depending on how you've set up the ROLESYNCH_MSG application message. You can see the results of the query on the **Role User List Page** by clicking the Refresh button.

The query runs only if the **Status** is set to ***Active.***

If you want to schedule the role to be run at certain intervals, use the **Roles Page**.

Additional Parameters Page

Usage	Use the Additional Parameters page to add more query options.
Object Name	WC_ROLE_QUERY
Navigation	Select the Additional Parameters tab on the Role Definition page.
Prerequisites	The Query Name must be set up on the Select Records page.



Additional Parameters page

The **Role Name** appears at the top of the page.

Query

Select the **Query Name** from the available options. The portal administrator established the query on the **Defining Role Queries**.

Only *Active* queries appear in the list of available options. You set the status for the query on the Select Records page.

The instructions appear in the text box from the Select Records page. This will help the marketing person understand what the query is intended to do and then select values for the fields that appear in the **Query Parameters** scroll area.

Query Parameters

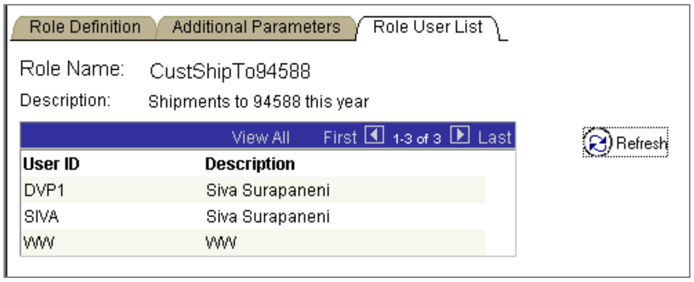
Select an **Operator** and enter a **Value** for each parameter.

If you don't select any conditions or values, the query will run for all values.

Role User List Page

Usage	Use the Role User List page to view all the users that are assigned the role from the Role Definition page.
Object Name	WC_ROLE_USER_LIST

Navigation	Select the Role User List tab on the Role Definition page.
Prerequisites	The Query Name must be set up on the Select Records page.



Role User List page

The **Role Name** and **Description** appear at the top of the page.

You can view the **User ID** and the **Description** for the users that are assigned to the role.

Click the **Refresh** button after processing the dynamic role to clear the previous users and view the new list of users.

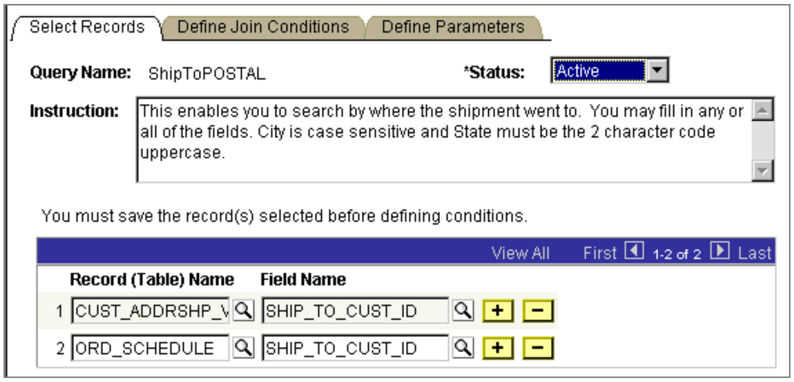
Defining Role Queries

Your portal administrator can create queries with the pages in the Define Role Queries menu. On the **Defining Role Queries**, you set up the records that will be used in the query. The join conditions for the records used in the query are established on the **Define Join Conditions Page**. Additional parameters for the records are established on the **Define Parameters Page**.

After the query is set up, the marketing personnel can assign values to the criteria using the **Additional Parameters Page**.

Select Records Page

Usage	Use the Select Records page to select the records that you want to use in the query. The portal administrator sets up this page, and marketing personnel add values for the query on the **Additional Parameters Page**.
Object Name	WC_ATTRIB_REC
Navigation	**Customer Portal, Personalization, Define Role Query, Select Records** **Define Business Rules, Maintain Customer Portal, Use, Define Role Query, Select Records**
Access Requirements	Enter a Query Name.



Select Records page

The **Query Name** appears at the top of the page.

When adding a new **Query Name,** don't use special characters. You'll be able to save the new role, but the query won't be able to run for some special characters.

The **Status** default is ***Inactive.*** The query displays on the **Working with Dynamic Roles** only if the **Status** is ***Active.***

Enter an **Instruction** to help the person who will select the values for the query on the **Additional Parameters Page**. Typically, this person is someone in your marketing department who is in charge of targeting the content for PeopleSoft Customer Portal.

Select the **Record (Table) Name** that contains the information that you want to use for the query.

You can add additional records on the **Record List Page**.

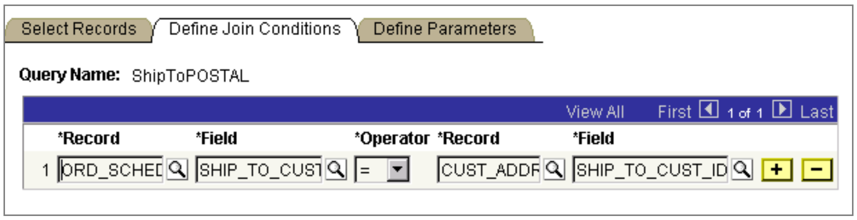
Enter at least one field name for one of the selected records. In order to target your users when adding new records to a query, be sure to add customer sold to, bill to, or ship to in the **Field Name** for records that contain these fields. The system default is the first customer ID on the record.

Note. You must select one **Field Name** for the query. You don't have to select a **Field Name** for each record.

After making changes to the records, click **Save** to populate the information to the other pages in the component.

Define Join Conditions Page

Usage	Use the Define Join Conditions page to establish the relationship between the records that you selected on the Select Records page.
Object Name	WC_ATTRIB_JOINT
Navigation	Select the Define Join Conditions tab on the Select Records page.



Define Join Conditions page

The **Query Name** appears at the top of the page.

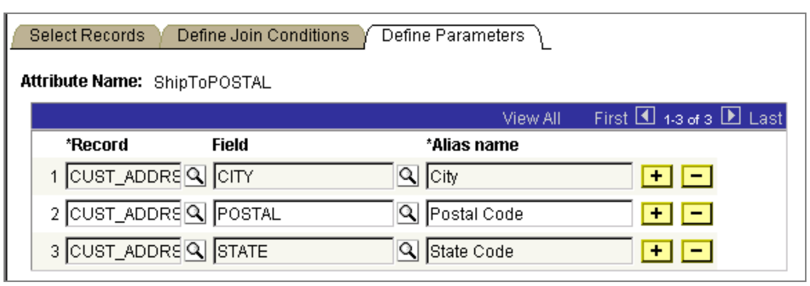
The values for the **Record** appear from the **Defining Role Queries**. Select the **Field Name** for the join condition.

Select the **Operator** for the join condition. The default is **=.**

Record Name 1 displays the record that you need to use to join to the **Record (Table) Name.** Similarly, select a **FieldName 1** to join to the **Field Name.**

Define Parameters Page

Usage	Use the Define Parameters page to define additional parameters for the query.
Object Name	WC_ATTRIB_FLD
Navigation	Select the Define Parameters tab on the Select Roles page.



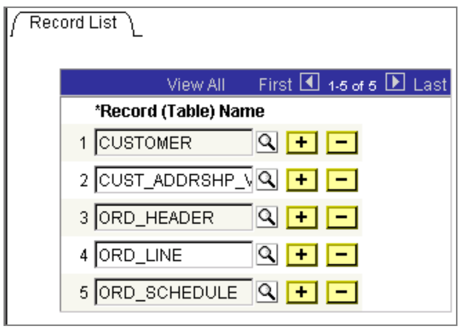
Define Parameters page

The **Query Name** appears at the top of the page.

The value for the **Record** appears by default from the **Defining Role Queries**. Select the **Field** name for the record. The default **Field** is the **Alias name.** You can change **Alias Name** so that it appears on the **Additional Parameters Page** to make it easier for the marketing person to select an appropriate value.

Record List Page

Usage	Use the Record List Page to add additional records that can be used in the query definition. The list of options is available only for customer order history records.
Object Name	WC_FAVORITE_REC
Navigation	**Customer Portal, Personalization, Role Records, Record List** **Define Business Rules, Maintain Customer Portal, Use, Record List**

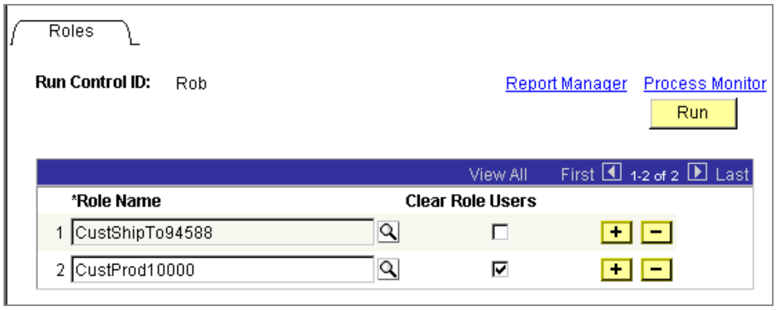


Record List page

Select from the available options to add new records to the list of available records to choose from when building a query. You select the records for the query on the **Defining Role Queries**.

Roles Page

Usage	Use the Roles page to schedule the roles to be run at specific intervals.
Object Name	WC_ROLE_RUN
Navigation	**Customer Portal, Personalization, Dynamic Role Assignment, Roles** **Define Business Rules, Maintain Customer Portal, Process, Dynamic Role Assignment, Roles**
Access Requirements	Enter a Run Control ID.



Roles page

Select the **Role Name** or run the process for all the roles. If you clear users from a role and you don't want to reassign that role to new users, select **Clear Role Users.** This is useful if you've set up seasonal queries and you don't want them to run each time. For example, you may set up a role for a spring promotion but you don't want to run that query throughout the year.

When you run the process, the existing users are removed from the query results and the new users are added. When you select **Clear Role Users,** the system removes the existing users but doesn't add new users for that role.

Note. The system processes only *Active* roles. The status of a role can be changed on the **Working with Dynamic Roles**.

Troubleshooting Personalizing Customer Portal

The following questions can help you pinpoint any problems that you are having personalizing the customer portal.

Q. Is the Role Status set to Active?

The Role Status must be set to Active on the **Defining Role Queries**. The query can then be displayed on the pages in the **Define Dynamic Role menu** and used when the **Roles process** is run.

Q. Did you use special characters in the Role Name on the Role Definition Page **or the Query Name on the** Defining Role Queries**?**

You can save a role or query using special characters, but the query won't be able to run for some special characters.

Q. Can you see the role on the News and Events creation pages?

1. You must turn on the publish/subscribe message for ROLESYNCH_MSG and ROLE_MAINT.
2. After creating the dynamic role, the role must be added to the Maintain Roles List page.

CHAPTER 4

Administering the PeopleSoft Customer Portal

The Customer Portal administration pages enable you to accomplish a number of administrative tasks, including the following:

- Access and administer other PeopleSoft applications, such as PeopleSoft eStore.
- Create personalization queries and create and assign dynamic roles.
- Maintain contacts.
- Manage the structure, content, and general settings of the portal.
- Import menu definitions into the portal registry.
- Submit menu items, company news, or company events articles for publication.
- Configure styles and colors to match the look and feel of your organization.

To access the Portal Administration pages, you must have the appropriate permissions in PeopleSoft Security. A customer portal administrator user role has been delivered with sample data. The user is *JOE* and the role is *WCADMIN*. These administration pages are available only through the Menu or Menu Navigation pagelet and only to administrators of the portal.

Personalization and administration of eStore and contacts through the Maintaining Contacts component are tasks unique to the Customer Portal menu structure. We provide links to other features and information to facilitate administration of PeopleSoft Customer Portal.

Customer Portal Administration

You can use the options accessed from the Customer Portal Administration link to administer PeopleSoft eStore, maintain contacts, and personalize your PeopleSoft Customer Portal.

eStore

If you have PeopleSoft eStore installed, you can administer PeopleSoft eStore through Customer Portal. The permission of WSPNLS has been granted to the WCADMIN role so that the customer portal administrator can administer PeopleSoft eStore as well.

For information about eStore, see PeopleSoft 8 eStore PeopleBook.

Maintain Contacts

You can administer internal and external contacts through PeopleSoft Customer Portal using the Maintain Contact component. You can set up external contacts to access PeopleSoft Customer Portal. You can also set up internal contacts for the **Contact Directory Page**.

For more information about setting up contacts, see Maintaining Contacts.

Personalization

You can click the Personalization link to access options that enable you to control what your customers see on PeopleSoft Customer Portal. For a targeted group of users, you can assign content such as news events, articles, and data-controlled content pagelets based on buying history and buyer behavior. Additionally, you can support direct marketing through email promotions.

For more information about personalization, see ***PeopleSoft 8.00.01 Customer Portal PeopleBook,*** **"Personalizing the PeopleSoft Customer Portal"**.

Portal Administration

The Portal Administration link enables you to manage PeopleSoft Customer Portal pagelets and objects in the portal registry. Registry objects include folders, content references, templates, and content providers. Common administrative tasks include adding, deleting, and renaming portal objects. There are many properties associated with each portal object, and all of these properties can be accessed and modified by an appointed portal administrator who has been given appropriate permissions through PeopleSoft Security.

Pagelet Administration

Company News

Your portal administrator can use this link to create a publication, define the news sections, assign content publishers to sections, and register the publication.

For more information about managing company news, see ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,*** **"Using the Company News Pagelet"**.

Company Events

Your portal administrator can review and assign a status to the article, and—depending on the status—accept or reject the article or require additional revisions.

For more information about managing company events, see ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,*** **"Using the Company Events Pagelet"**.

Roles

Role-based security technology is an important component of PeopleSoft Customer Portal. All content is secured through the role-based security in PeopleSoft Internet Architecture. PeopleSoft Customer Portal displays content specific to a particular user role.

You can use this link to specify which roles may view company news, company events, and external news content.

For more information about managing roles, see ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,*** **"Using the Company Events Pagelet"**.

Menu Items

The Menu Item feature in PeopleSoft Customer Portal provides two-part functionality—one part for your customer and another for your portal administrator. The portal user can use this link to submit a menu item. The portal administrator can review the item and then notify the portal user if the item has been registered or rejected or if it needs reworking.

For more information about managing menu items submitted by users, see ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook*, "Submitting and Managing Menu Items"**.

Registry Load Import

You can click this link to import registry load items from the Registry Load table and to review errors after running the Registry Load process.

For information about how data is loaded into the portal registry, see Understanding the Portal Registry Load Process.

Structure and Content

You can click the Structure and Content link to add, edit, and delete folders and content references.

For information about managing the structure and content of a portal, see Managing Folders and Content References.

General Settings

You can click the General Settings link to enter a description for an entire portal and to set the default template. You can also add, edit, and delete content providers for the portal.

For information about managing general settings for a portal, see Managing General Portal Settings.

Menu Import

You can click the Menu Import link to populate a registry using existing PeopleSoft menu definitions.

For information about importing menu definitions into a portal registry, see Importing a Menu Group into the Portal Registry.

Build Search Index

You can click the Build Search Index link to create a search engine index used by the portal.

For information about building a search index, see Building and Using Search Indexes.

Portal Installation

You can click the Portal Installation link to view the portal products that you have installed.

For information about installing portal products, see Installing Portal Solutions.

Submit Portal Content

Content authors can click the Submit Portal Content link to access options for submitting company news and events for publication, or to submit a PeopleSoft page, a URL, or a viewable file for posting to PeopleSoft Customer Portal menu.

Company News

The Company News pagelet displays a list of news sections relevant to the company. Article titles appear beneath their related news section. Content authors can click the Company News link to submit a company news article for publication.

For more information about submitting company news, see ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,*** **"Using the Company News Pagelet"**.

Company Events

The Company Events pagelet displays a list of event articles, the titles of which appear as links. Content authors can click this Company Events link to submit a company events article for publication.

For more information about submitting company events, see ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,*** **"Using the Company Events Pagelet"**.

Menu Items

The Menu Item feature of PeopleSoft Customer Portal enables your customer to contribute information to the company's intranet and leave the registration of the process to the portal administrator.

For more information about submitting a menu item, see ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,*** **"Submitting and Managing Menu Items"**.

PeopleTools

PeopleSoft Customer Portal attempts to assist users by providing links that may be of interest based on what the user is currently viewing. You can click the PeopleTools link, for instance, to drill down to the PeopleTools administration pages.

For more information about PeopleTools administration, see Administration Tools.

My Information

PeopleSoft Customer Portal enables you to enter and change your personal profile information as an administrator. By editing the profile, you can change your portal password, define your email address, and set up an alternate user to receive routings in your absence.

For more information about viewing or modifying the user profile, see My Profile.

Customer Portal Links

Your customer can navigate to the PeopleSoft eStore, eBill Payment, and eService applications through the PeopleSoft Customer Portal links.

Your customer can use Helpful Links to access the Customer Selection page and the Contact Directory page. For instance, if your customers have multiple bill-to customers associated with their user ID, they can select with which customer they prefer to work on the Customer

Selection page. As an administrator, you will see these links to ensure that the portal navigation menu is displayed correctly for your customers.

For more information about setting up contacts, see Maintaining Contacts.

Configuring Customer Portal

Use the information to help you configure Customer Portal to match the look and feel of your organization.

The following Customer Portal elements can be configured:

Styles and Colors	Styles and colors can be changed through Application Designer and the Style Sheet object. Customer Portal uses the CUSTOMERDEF style sheet.

Important! You must have an in-depth knowledge of PeopleTools and Application Designer to configure Customer Portal.

Customer Portal Styles

Customer Portal uses the CUSTOMERDEF Style Sheet. This style sheet is intended for externally facing applications. The use of a different style sheet from PSSTYLEDEF (used for internally facing applications) enables you to create a unique external look and feel for the Customer Portal. This section details the styles used by Customer Portal and what each is used for by the delivered sample website.

PAADDITIONALINSTRUCTIONS	Additional instructional text.
PABOLDBGTEXT	Bold Background Text
PABOLDLINK	Bold Hyperlink
PABOLDTEXT	Black Bold Text
PABOLDTEXT1	Blue Bold Text
PABOLDTEXT2	White Bold Text
PAERRORTEXT	Red Error Text
PAFRAMEBACKGROUND	Frame Background Color
PALINK	White Header Navigation Hyperlinks
PAPAGETITLE	Blue Page Titles

PAPRICE	Pricing Text
PAPRICEORIG	Original Price
PAPRICESALE	Sale Price
PSGROUPBOXLABEL	Group Box Labels
PSLEVEL1GRIDCOLUMN HDR	Level 1 Grid Column Headers
PSLEVEL1GRIDLABEL	Level 1 Grid Labels
PSPUSHBUTTON	Push Buttons
PSTFOOTTEXT	Small Footer Text
PSTLEFTMENU	Left Menu Background
PSTLEFTMENULINK	Left Menu Links
WSCARTBOX	Shopping Cart Area
WSSEARCHBOX	Product Search Area

For more information about PeopleTools Style Sheets, see Creating Style Sheet Definitions.

CHAPTER 5

Setting Up End-User Help for Customer Portal

PeopleSoft provides a complete set of HTML-based end-user help pages. Those pages are context-sensitive; that is, when a customer clicks the Help button from any page of your website, a relevant end-user help page opens.

End-user help appears in a separate window from the main Customer Portal window. The end-user help window is smaller than the main window, so your customers can view both windows at the same time. Customers can navigate from one end-user help page to another, using an index that expands and collapses to display different sections. The standard browser navigation buttons are suppressed in the end-user help window.

You can modify the delivered end-user help pages in any HTML editor or text editor. This is important, because the sample end-user help pages that we deliver refer to a fictional website—www.PeopleGear.com. When you install Customer Portal, you'll want to replace references to PeopleGear with references to your own website. That includes text references, company logo images, and maybe even formatting elements such as company colors and fonts.

Important! You should adapt Customer Portal's help pages to represent your company, not the fictional PeopleGear company referred to in Customer Portal's sample data.

End-User Help Sections

On the end-user help pages accessible from the sample (PeopleGear) website, your customers will find all the information they need to use the PeopleGear website effectively.

Basic website questions are answered in the following sections within Help:

PeopleSoft Customer Portal End-User Help

The end-user help pages accessed from the Portal Help tab are specific to Customer Portal.

Home

In this section, your customers can find a description of your homepage and its use, including information and links to Customer Portal features and information.

User Profile

In this section, your customers can find the following end-user help pages:

Contact Information	Instructions on entering contact information.
User Security Information	Instructions on creating or changing passwords.
Addresses	Instructions on setting up shipping and billing addresses.
Preferences	Instructions on modifying your preferences.

Contact Us

In this section, your customers can find an invitation to contact your organization with questions or comments.

Personalization

In this section, your customers will find the following end-user help pages:

Personalize Layout	Instructions on organizing the layout of your Customer Portal.
Personalize Content	Instructions on selecting the content of your Customer Portal and changing the welcome message.
Personalize Pagelet	Instructions on displaying and removing pagelets and on managing items in the company news pagelet

Helpful Links

In this section, your customers can find information about using PeopleSoft Customer Portal links to select the appropriate customer for their transaction and to look up email and phone numbers for contacts at PeopleGear.

Pagelets

In this section, your customers can find information about the PeopleGear pagelets—the sections of the PeopleSoft Customer Portal homepage that contain summaries of key business information.

Frequently Asked Questions

In this section, your customers can find answers to the questions most often asked about PeopleSoft Customer Portal.

PeopleSoft eBill Payment End-User Help

The end-user help pages accessed from the Pay tab are specific to PeopleSoft eBill Payment.

eBill Payment Home

In this section, your customers can find a description of the PeopleSoft eBill Payment homepage and its use.

Viewing Bills

In this section, your customers can find information about how to access specific invoice and related payment information. They can obtain instructions for the following activities:

- Reviewing line item, discount, surcharge, or tax information for regular and consolidated bills.
- Reviewing PeopleSoft Receivable details for the invoice, such as the item status, balance, and activity for the specified invoice for regular and consolidated bills.
- Searching for a specific bill.
- Requesting a duplicate copy of a bill by email.

Paying Bills

In this section, your customers can find information about paying invoices over the internet. They can obtain instructions for the following activities:

- Paying bills over the internet with the click of a button.
- Selecting a payment method of credit card or direct debit and navigating through the payment process.
- Submitting payment and receiving a transaction confirmation.

Viewing Balances

In this section, your customers can find information about reviewing details of their account balances. Specifically, they can find instructions for obtaining general account balance information as well as the following:

- Account balances displayed by company division.
- Account balances in their preferred currency.
- A summary of their credit limit, balance, and overdue balance totals.
- Their most recently posted payments and most recent transaction information.
- Their account aging information.

Paying Balances

In this section, your customers can find information about selecting an outstanding balance and paying it off using a credit card.

Viewing Payments

In this section, your customers can find information about viewing payments and determining which items the payment should be applied to. Specifically, they can find instructions for:

- Reviewing payment details, such as the date payment was received, the date payment was applied, and payment amounts.
- Searching for specific payments by ID, by the payment applied status, or by payments made within a specified date or amount range.

My Preferences

In this section, your customers can find information about configuring their eBill Payment preferences. They can find instructions for configuring:

- The number of bills that initially appear on their Bill List pages.
- The default payment method used when paying their bills online.
- The search criteria available when searching for bills.

Contact Us Notes

In this section, your customers can find information for creating and submitting notes to communicate customer service issues and obtain instructions for reviewing and responding to these notes using the Contact Us Notes application.

PeopleSoft eStore End-User Help

The end-user help pages accessed from the Buy tab are specific to PeopleSoft eStore.

First Time Users

In this section, your customers will find the following end-user help pages:

Frequently Asked Questions	Answers to frequently asked questions about eStore.
Navigation Tips	Instructions on how to navigate through the end-user help pages.
EStore Home	Description of your eStore homepage and its use.
Search Tips	Instructions on finding products.

Viewing Products

In this section, your customers can find the following end-user help pages:

Search Tips	Instructions on locating products.
Catalog	Description of the catalog and its use.
Product Details	Instructions on viewing details about products.

Personal Lists

In this section your customers can find instructions about creating and maintaining personal lists of products they order frequently.

Placing Orders and Quotes

In this section, your customers can find the following end-user help pages:

Shopping Carts	Instructions on creating and updating shopping carts.
Express Order	Instructions on entering product IDs for quick order creation.
Order Status	Instructions on viewing information about all of the orders that a customer has placed with your company.
Quote Status	Instructions on viewing information about all of the quotes that a customer has placed.
Quote Summary	Instructions on viewing existing quotes and copying a quote to an order.

Checkout

In this section, your customers will find the following end-user help pages:

Shopping Carts	Instructions on creating and updating shopping carts.
Delivery Options	Instructions on selecting shipping dates, addresses, ship via codes, and carriers.
Billing Options	Instructions on selecting billing addresses and entering payment information.
Order Summary	Instructions on verifying that an order has been entered correctly.

Formatting End-User Help Pages

The end-user help pages accessible from the sample (PeopleGear) website are divided into two frames: a body frame and an index frame. The body frame contains most of the information, including text and images. The index frame contains a collapsible JavaScript-based index.

The left navigation is split into three sections: Help associated with PeopleSoft Customer Portal, help associated with PeopleSoft eBill Payment, and help associated with PeopleSoft eStore. These sections are intended to facilitate ease of use by placing in one area the help specific to the process in which the user is engaged. For example, if the user is purchasing a product from eStore and selects Help, all help associated with the order process becomes available in the left navigation area.

End-user help page associated with PeopleSoft Customer Portal: index frame (left, blue background) and body frame (right, white background).

End-user help page associated with PeopleSoft eBill Payment

End-user help page associated with PeopleSoft eStore

Standard navigation buttons do not appear on end-user help pages, for three reasons. First, they are not necessary: Customers always jump from an application page to a relevant end-user help page, and they can use the end-user help index to move around the end-user help pages. Second, the simple format helps ensure that your customers are not overwhelmed by your end-user help pages but, rather, find them pleasant and easy to use. Third, suppressing the navigation buttons saves valuable desktop space.

Understanding the popupHelp() JavaScript Function

When a customer clicks a Help button on one of your web pages, the popupHelp() JavaScript function is invoked.

You use the popupHelp() JavaScript function to manage the relationship between web pages and end-user help pages. You use the same function to define parameters for the end-user help window, such as size and display of menus and scroll bars. The popupHelp() function resides in the HTML catalog entry WS_PAGE_SUBMIT_JS.

Important! Do not change the Customer Portal Submit function at the top of the WS_PAGE_SUBMIT_JS HTML catalog entry. The Customer Portal Submit function controls all website navigation.

For more information about the HTML catalog, see Command Line for Upgrade Copy.

Locating End-User Help Directory

You define the path to the end-user help files directory during installation, in the configuration.properties file. As delivered, that line of code reads as follows:

```
HelpUrl=http://<SERVERNAME>/Portal/help/%LANG_CD%/#%CONTEXT_ID%
```

This HelpUrl property is stored on every page in the ICHelpUrl hidden variable. The %LANG_CD% and %CONTEXT_ID% variables will be substituted as follows:

The %LANG_CD% variable identifies the directory in which the actual end-user help pages reside. For example, English-language end-user help files reside in a directory called "eng"; Spanish-language end-user help files reside in a directory called "esp."

The %CONTEXT_ID% variable contains the PeopleSoft Customer Portal page name from which the customer clicks the Help button, and it determines which HTML help files appear in the end-user help window.

The popupHelp() function contains a <base> HTML tag that defines the path to the end-user help pages directory. It will use the same language as the PeopleSoft Customer Portal page from which the function has been invoked.

```
HtmlBuffer +="<BASE HREF='" + url.substring(0,pos) + "'>";
```

Editing the Customer Portal Help Files

After installation, you may need to edit the files in your PeopleSoft Customer Portal help directory, depending the PeopleSoft applications you have installed. If you have PeopleSoft eStore, eBill Payment, and Customer Portal installed, you do not need to edit these help files.

Even if you have PeopleSoft eStore, eBill Payment, and Customer Portal installed, you still need to configure your config.properties file.

All of your application servers should be pointing to the same help directory so that the help files can be maintained in one place.

If you do not have PeopleSoft eStore or eBill Payment installed, you must edit the left navigation bar files to match the suite of applications you have installed. The left navigation bar files all include the syntax *wc_leftnav~.htm*. For example, *wc_leftnav1.htm* and *wc_leftnav2.htm* are two of the left navigation bar files. These files consist of HTML tables and anchors that allow navigation through the help menu. Each left navigation file contains HTML comments denoting which sections should be removed if a product is not installed.

For example, a block of code may begin with the following comment:

```
<! - - - Begin section to remove if eStore is not installed  - - ->
```

The corresponding code follows. The block of code would end with the following comment:

```
<! - - - End Remove section- - ->
```

If you do not have PeopleSoft eStore or eBill Payment installed, you must edit the left navigation bar files to remove the tabs.

Editing Help Files When PeopleSoft eStore Is Not Installed

If you do not have PeopleSoft eStore installed, you must edit the following left navigation bar files according to the instructions provided in the comments:

- wc_leftnav1.htm
- eb_leftnav1.htm

Important! Be sure to remove the appropriate <*td*> </*td*> in the table and add 60 to the width of the last <*td*> </*td*> in the table, as specified in the comments.

Editing Help Files When PeopleSoft eBill Payment Is Not Installed

If you do not have PeopleSoft eBill Payment installed, you must edit the following left navigation bar files according to the instructions provided in the comments:

- wc_leftnav1.htm
- ws_leftnav1.htm
- ws_leftnav2.htm

- ws_leftnav3.htm
- ws_leftnav4.htm
- ws_leftnav5.htm
- ws_leftnav6.htm

Important! Be sure to remove the appropriate <*td*> </*td*> in the table and add 60 to the width of the last <*td*> </*td*> in the table, as specified in the comments.

Editing Help Files When PeopleSoft eBill Payment and PeopleSoft eStore Are not Installed

If you do not have PeopleSoft eBill Payment or PeopleSoft eStore installed, you must edit the following left navigation bar files according to the instructions provided in the comments:

- wc_leftnav1.htm

Important! Be sure to remove the appropriate <*td*> </*td*> in the table and add 120 to the width of the last <*td*> </*td*> in the table, as specified in the comments.

Mapping Web Pages to End-User Help Pages

End-user help is context-sensitive. So, if a customer clicks the Help button on a catalog page, the end-user help page Catalog opens. You map web pages to end-user help pages through the popupHelp() function as follows:

The popupHelp() function contains a series of `if` statements that map end-user help pages with those PeopleSoft Customer Portal web pages from which the help was called. Each line of the relevant code reads as follows:

```
if (page'<WEB PAGE NAME>')       {leftnav='<INDEX FRAME
FILENAME>';mainbody='<MAINBODY FRAME FILENAME>'; basepath=url.substring(0,
pos);}
```

The `<WEB PAGE NAME>` contains every PeopleSoft Customer Portal page from which a customer might access end-user help pages.

The `<INDEX FRAME FILENAME>` and `<MAINBODY FRAME FILENAME>` reference the frames that are displayed when the Help button is clicked. The frame file names can be overridden as needed.

In the block of the popupHelp() JavaScript function following the line `windowOptions =,` the actual HTML for end-user help pages is assembled.

The file name of the top frame on end-user help pages, in which only an image is displayed, is hard coded. The relevant line reads as follows:

```
HtmlBuffer +="<frame NAME=_top SRC='ws_topheader.htm'
```

The system inserts the appropriate index frame file name (retrieved as described above) into the `leftnav` variable on the line that reads as follows:

```
HtmlBuffer +="<frame NAME=_left SRC='" + leftnav
```

The system inserts the appropriate mainbody frame file name (retrieved as described above) into the `mainbody` variable on the line that reads as follows:

```
HtmlBuffer +="<frame NAME=_body SRC='" + mainbody
```

For more information about the LANGUAGE_CD field, see Translate Table Attributes. For more information about creating end-user help directories, see the version of *PeopleSoft 8 Installation and Administration* that corresponds to your database platform.

Defining End-User Help Window Parameters

You use the popupHelp() JavaScript function to define parameters (such as size and the display of menus and scroll bars) for the end-user help window. You define frame parameters separately from whole-window parameters.

Several important variables are defined in the delivered WS_PAGE_SUBMIT_JS HTML catalog entry as follows:

Size	Width = 545, height = 400
Scrollbar	Scroll bars = 1 (one scroll bar)
Resizable	Resizable = 0 (window is not resizable by customer)
Standard toolbars	Toolbar = 0 (no toolbar)

Index

R

S

U