



Self-Service Portal Administration

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Timing and Agenda

August 21, 2023 -10:00-11:00 AM PT

Day 1

Lesson 1: Configuring the Self-Service Portal

Lesson 2: Managing Access to the Self-Service Portal

August 22, 2023 -10:00-11:00 AM PT

Day 2

Lesson 3: Managing the Inventory Catalog in the Self-Service Portal

Lesson 4: Configuring Case Management in the Self-Service Portal

Timing and Agenda

August 23, 2023 -10:00-11:00 AM PT

Day 3

Lesson 5: Tailoring the Self-Service Portal



Configuring the Self-Service Portal

Managing Access to the Self-Service Portal

Managing the Inventory Catalog in the Self-Service Portal

Configuring Case Management in the Self-Service Portal

Tailoring the Self-Service Portal

Company Story

Company Structure

The SweetLife Fruits & Jams company is a midsize company located in New York City. The company consists of the following branches:

- **SweetLife Head Office and Wholesale Center:** This branch of the company consists of a jam factory and a large warehouse where the company stores fruit (purchased from wholesale vendors) and the jam it produces. Warehouse workers perform warehouse operations by using barcode scanners or mobile devices with barcode scanning support.
- **SweetLife Store:** This branch has a retail shop with a small warehouse to which the goods to be sold are distributed from the company's main warehouse. This branch is also planning on selling goods via a website created on an e-commerce platform to accept orders online. The e-commerce integration project is underway.
- **SweetLife Service and Equipment Sales Center:** This branch is a service center with a small warehouse where juicers are stored. This branch assembles, sells, installs, and services juicers, in addition to training customers' employees to operate juicers.

Company Story

Operational Activity

The company has been operating starting in the 01-2022 financial period. In November 2022, the company started using Acumatica ERP as an ERP and CRM system and migrated all data of the main office and retail store to Acumatica ERP. Because the company has grown, the equipment center has begun its operations in 01-2023.

In 01-2023, the company management decided to set up the Self-Service Portal to provide SweetLife customers with access to the products and services that the company sells and to give customers the ability to submit and track support cases.

Company Story

SweetLife Company Sales and Services

Each SweetLife company's branch has its own business processes, as follows:

- **SweetLife Head Office and Wholesale Center:** In this branch, jams and fruit are sold to wholesale customers, such as restaurants and cafes. The company also conducts home canning training at the customer's location and webinars on the company's website.
- **SweetLife Store:** In the store, retail customers purchase fresh fruit, berries, and jams, or pick up the goods they have ordered on the website. Some of the goods listed in the website catalog are not stored in the retail warehouse, such as tropical fruits (which are purchased on demand) and tea (which is drop-shipped from a third-party vendor).
- **SweetLife Service and Equipment Sales Center:** This branch assembles juicers, sells juicers, provides training on equipment use, and offers equipment installation, including site review and maintenance services. The branch performs short-term service provision.

The company has local and international customers. The ordered items are delivered by drivers using the company's own vehicle. Customers can pay for orders by using various payment methods (cash, checks, or credit cards).

Company Story

Company Purchases

The company purchases fruits and spices from large fruit vendors for sale and for jam production. For producing jams and packing jams and fruits, the company purchases jars, labels, and paper bags from various vendors. For the internal needs of the main office and store, the company purchases stationery (printing paper, pens, and pencils), computers, and computer accessories from various vendors. The company also purchases juicers and juicer parts from large juicer vendors, and it either purchases the installation service for the juicers or provides the installation service on its own, depending on the complexity of the installation.

Day 1

Lesson 1: Configuring the Self-Service Portal

Learning Objectives

In this lesson, you will learn how to do the following:

- Activate the license of the Self-Service Portal
- Delete the license of the Self-Service Portal
- Specify the general settings of the Self-Service Portal

Configuring the Self-Service Portal: To License the Self-Service Portal Instance

Suppose that the SweetLife Fruits & Jams company has decided to create a Self-Service Portal instance, which will be used by SweetLife customers. Acting as a **system administrator**, you need to configure the system before these users can use it. As a first step, you need to activate the instance of the Self-Service Portal.

License the Self-Service Portal Instance

Self-Service portal requires a separate license

- To Add New License
 - Open Activate License Form (SM201510) under the Self-Service Portal
 - Click Enter License Key Agree and Apply License
- To Delete a license:
 - Open Activate License Form (SM201510)
 - Click Delete License and confirm deletion

When in trial mode, only 2 users can use the Self-Service portal. Notice when license is applied, the trial bar is hidden

Configuring the Self-Service Portal: To Specify the General Settings of the Self-Service Portal

Suppose that SweetLife Fruits & Jams has decided to create a Self-Service Portal instance, which will be used by SweetLife customers. Acting as a system administrator, you need to configure the system before these users can use it, and you need to specify the general settings for the Self-Service Portal.

1. Enable Portal Feature under the ERP
2. Open the Portal Preferences (SP800000) form under the Self-Service Portal :
 1. Set **SweetLife Online Shop** as the portal Name
 2. Set **From Company** in the **Display Financial Documents** box
 3. Set **SWEETLIFE** in the Portal Site Company box

Lesson 2: Managing Access to the Self-Service Portal

Learning Objectives

In this lesson, you will learn how to do the following:

- Create a role for the Self-Service Portal users
- Add a user account for a contact
- Delegate user management to an administrative user of a customer's organization

Managing Access to the Self-Service Portal: To Create Roles for Employees of a Customer

Suppose that your company wants to have different access rights for users of the Self-Service Portal. You want to have two roles for the Self-Service Portal users: one for administrators of customer organizations (Customer Admin), and another for users of customer organizations (Customer User). You need to create a new role based on a copy of the existing Portal User role and specify the proper access rights to some of the forms.

Steps to Create New Roles

Open the Access Rights by Role (SM201025) form under the **Self-Service Portal**

- Select **Portal User** under Role Name and then select Copy Role
- Set New Role Name to **Customer Admin** and click Copy
- Set Role Description to **Customer administrator** and Save
- Do the same to create a new Role and name it **Customer User** with description as **Customer User**. Make sure to click **Save**

Specify Proper Access Rights for the Customer User Role

Open the Access Rights by Role (SM201025) form under the Self-Service Portal

- Select the **Customer User Role**
- Select **Administration** in the Left Pane below the tenant node
 - Set the Access Right to **Revoked** for the row with description as **Portal Preferences**
 - Click on **save**
- Select **Profile** in the Left Pane below the tenant node
 - Set the Access Right to **View Only** for the row with description as **Company Profile**
 - Set the Access Right to **Revoked** for the row with description as **Contacts**
 - Click on **save**

Managing Access to the Self-Service Portal: To Create User Types for the Self-Service Portal

Suppose that SweetLife Fruits & Jams wants to give access to the Self-Service Portal for users of customers' companies. To start configuring the access, you need to create specific user types first. You will need to create the Customer Admin and Customer User user types, which you will use for the Customer Admin and Customer User user roles, respectively.

Creating a User Type for Customer Users

Open the User Types (EP202500) form under the ERP

- Set User Type to **Customer User**
 - Set Linked Entity box to **Contact**
 - Set Description to **Customer user**
 - Under **Allowed Roles** Tab select the Add Icon
 - Select role Name **Customer User** and Default selected
 - Under **Login Rules** Tab, select the **Use Email as Login** check box
 - Save

Creating a User Type for Customer Administrators

While still viewing the User Types (EP202500) form under the ERP

Add New User Type by selecting the **Add New Record** icon

- Set User Type to **Customer Admin**
 - Set Linked Entity box to **Contact**
 - Set Description to **Customer admin**
 - Under **Allowed Roles** Tab select the Add Icon
 - Select role Name Customer Admin and Default selected
 - Under **Managed User Types** Tab select the Add Icon
 - Set User Type column to **Customer User**
 - Under **Login Rules** Tab, select the **Use Email as Login** check box
 - Save

Managing Access to the Self-Service Portal: To Create a User Account for a Contact

Suppose that your company has decided to provide the Self-Service Portal for users of customers' companies. As a system administrator, you have already created user roles and user types, and now you need to create two user accounts in the Self-Service Portal for the following customer contacts of Storehut (a chain of supermarkets):

- A customer administrator (Tonya Lawrence, a buyer) who will have the access rights to manage other user accounts of this customer in the Self-Service Portal and update company's profile. The Tonya Lawrence contact has already been created on the Contacts (CR302000) form of Acumatica ERP, and you need to create a corresponding user account.
- A customer user (Ray Newman, an assistant buyer) who will have restricted access to company profile modification and company contacts. No contact or user account exists for Ray Newman in Acumatica ERP, and you will create both a contact and a user account.

You will then verify that the created users have the proper access rights in the Self-Service Portal.

Creating a User Account for Tonya Lawrence

Open the Users (SM201010) form under the ERP

- Set Login to **tonya@storehut.example.com**
 - Uncheck **Generate Password**
 - Set Password to the password provided by email + 4
 - Ex if the pass was **W@bin@r** then set it here to **W@bin@r4**
 - Set User Type to **Customer Admin**
 - Set Linked entity to **Tonya Lawrence**
 - Allow Password Recovery: Selected
 - Allow Password Changes: Selected
 - Password Never Expires: Cleared
 - Force User to Change Password on Next Login: Selected
 - **Save**

Creating a **New Contact** and a User Account for *Ray Newman*

Open the Contacts (SM201010) form under the ERP

- Add New Record
 - Set Business Account to **STOREHUT**.
 - on Details Tab, set:
 - First Name to **Ray**
 - Last Name to **Newman**
 - Job Title to **Assistant buyer**
 - Email to **ray.newman@storehut.example.com**
 - Clear the override check box in the address section. This will load the same address as the STOREHUT business Account
 - on CRM info Tab, set Contact Class to **STORE**
 - **Save**

Creating a New Contact and a **User Account** for *Ray Newman*

While still viewing the new Contact record of *Ray Newman*

- On the User Info tab, do the following:
 - Set User Type to **Customer User**
 - Make sure Login is set to Ray's Account Email: **ray.newman@storehut.example.com**
 - Uncheck **Generate Password**
 - Set Password to **[Password]4**
 - **Save**

Verifying Tonya and Ray's Access to the Self-Service Portal

Open the Self-Service Portal

Login using the credentials of Tonya:

- **tonya@storehut.example.com (Change Password as instructed)**
 - Open Company Profile (SP408030) Form
 - Set Fax same as the Phone Number and Save
 - Open Contacts (SP408040) Form
 - Notice Tonya can add new Contacts

Login using the credentials of Ray:

- **ray.newman@storehut.example.com (Change Password as instructed)**
 - Open Company Profile (SP408030) Form
 - Notice data is not available for editing
 - Search for Contacts (SP408040) Form
 - Notice Ray cannot find the form

Day 2

Agenda

~~August 21, 2023 -10:00-11:00 AM PT~~

~~Day 1~~

~~Lesson 1: Configuring the Self-Service Portal~~

~~Lesson 2: Managing Access to the Self-Service Portal~~

August 22, 2023 -10:00-11:00 AM PT

Day 2

Lesson 3: Managing the Inventory Catalog in the Self-Service Portal

Lesson 4: Configuring Case Management in the Self-Service Portal

Reminders

- **As part of the webinar, you were given some files for training, please make sure you have them on your local machine as we will be using those files today**
- **2 questions from yesterday's session will be answered before the Q&A**

Lesson 3: Managing the Inventory Catalog in the Self-Service Portal

Learning Objectives

In this lesson, you will learn how to do the following:

- Develop an understanding of the tasks that must be performed for the configuration of the inventory catalog
- Configure order management in the Self-Service Portal
- Update descriptions and images for inventory items included in the catalog
- Create sales categories for the inventory catalog
- Manage sales categories for inventory items
- View the inventory items in the catalog and add an item to the cart in the Self-Service Portal

Managing the Inventory Catalog in the Self-Service Portal: Implementation Activity

Suppose that you are Kimberly Gibbs, a system administrator at the SweetLife Fruits & Jams company. You need to configure the Self-Service Portal to provide your customers with access to the products that SweetLife sells. In your Acumatica ERP instance, **you need to create new sales categories, add new items to these categories, which gives customers the ability to order these items in the Self-Service Portal.**

Enabling required features

1- Under the ERP Enable/Disable Features form, we need to enable:

- Customer Portal
 - B2B Ordering
 - Financials on Portal

Configuring order management in the Self-Service Portal

Sign-in to the Self-Service Portal and open the Portal Preferences (SP800000) form.

Under the B2B Ordering Setting Tab do the following:

- Set Default Branch for New Orders box to **HEADOFFICE**
- Set Sales Order Type box to **SO**
- Select the check box in the row that has **WHOLESALE** in the Warehouse ID column.
- **Save Form**
- Set Default Stock Item Warehouse box to **WHOLESALE**
- Set the Default Non-Stock Item Warehouse box to **WHOLESALE**.
- Clear the **Show Available Quantities** check box.
- Make sure that **the Allow Only Sales Unit for Purchase** check box is selected.
- **Save Again**

Configuring order management in the Self-Service Portal

Update the Default Image Settings (for items not having any images attached):

- Click Browse.
- Select the sweetlife.jpg file.
- Click Upload.
- On the form toolbar, click Save.

Sign out of the Self-Service Portal.

Make an item for sale available in the catalog

To have an item for sale included in the catalog:

1. Create the Item under the Stock Items form
2. Create a sales category under which the above item falls
3. Include the Item to the created Sales Category

Update descriptions & images for inventory items included in the catalog

Sign-in to the ERP and open the **Stock Items (IN202500)** form:

- Select **Apples** Record
- Update the Description field to: **Fresh Red Delicious apples 1 lb**
- Open the Attributes Tab
 - Click Browse next to the image box
 - Select the **red_delicious.jpg** provided
 - Click upload
- Save Form

Create sales categories/subcategories for the inventory catalog

Under Acumatica ERP, Open **Item Sales Categories (IN204060)** form.

1. Add Fruits category by:
 1. In the Categories pane, click the tenant name.
 2. On the Categories pane toolbar, click **Add Category**.
 3. At the top of the right pane, in the Description box, type **Fruits**.
 4. On the form toolbar, click Save
2. Same Process to Add Spares Category with Description as **Spares**.
3. Create Subcategories of the Fruits category
 1. In the Categories pane, click the **Fruits** name.
 2. On the pane toolbar, click **Add Category**.
 3. At the top of the right pane, in the Description box, type **Exotic Fruits**.
 4. On the form toolbar, click Save
4. Same Process to Add Seasonal Fruits, Subcategory of Fruits, with Description as **Seasonal Fruits**.

Manage sales categories for inventory items

Renaming a Sales Category while still under **Item Sales Categories (IN204060)** form:

1. In the Categories pane, click the **Spares** category.
2. In the right pane, in the Description box, type **Spare Parts**.
3. On the form toolbar, click Save.

Rearranging Sales Categories:

1. In the Categories pane, click the **Certificates** category.
2. On the pane toolbar, click **Move Node Up** until the **Certificates** category is first in the list
3. Click the **Fruits** category.
4. Click **Move Node Up** until the **Fruits** category is directly under the **Certificates** category

Adding Inventory Items to a Sales Categories

Add an Inventory Item to the **Fruits** category under **Item Sales Categories (IN204060)** form

1. In the Categories pane, click the **Fruits** category.
2. In the right pane, on the table toolbar of the **Category Members** table, click **Add Row**.
3. Set Inventory ID column to **GINGER** Item

Add all inventory Items of a class to a category

1. In the Categories pane, click the **Fruits** category.
2. In the right pane, on the table toolbar of the **Category Members** table, click **Add Items**.
3. In the Add Item Dialog box set:
 1. Add Items box set to **By Class**.
 2. Item Class to **FOOD**
 3. Click Add

Same Process to add all the items under **JCRCFGPRT** class to **Spare Parts** category

Removing an Inventory Item from the Catalog

To remove an item from the catalogue you simply need to remove it from a specific sales category:

Open the **Item Sales Categories (IN204060)** form:

- Select **Fruits** under the **Categories** Pane
- in the Category Members table, select the unlabeled check box in the row with the **GINGER** item.
- Click **Delete Row**
- **Save**

Sign out from the ERP

View the inventory items in the catalog & add an item to the cart in the Self-Service Portal

Sign-in to Portal using tonya@storehut.example.com

Go to Orders – Catalog to open the **Catalog (SP700000)** Form:

- Under Category, Make sure you can see the new created categories: **Fruits & Spare Parts**
- Check that you can extend the **Fruits** category to see the **Exotic Fruits & Seasonal Fruits** subcategories
- Double-click on **Fruits**
 - The table will be filtered to show only the items under the **Fruits** Category
 - Note that **GINGER** is not listed
- We also have **APPLES** listed there, note the **updated description** and then click the related **Inventory ID**
 - Notice the image in the Dialog Box
- Now set the Quantity to 5 for the APPLES entry and select Add to cart
- Your Cart have now the new entry with the related Price

Lesson 4: Configuring Case Management in the SelfService Portal

Learning Objectives

In this lesson, you will learn how to do the following:

- Become familiar with case processing in the Self-Service Portal
- Develop an understanding of the tasks that must be performed for the configuration of case management in the Self-Service Portal
- Configure basic case management functionality in the Self-Service Portal
- Verify that the case management functionality in the Self-Service Portal has been correctly configured

Configuring Case Management in the Self-Service Portal: Implementation Activity

Suppose that you are Kimberly Gibbs, a system administrator at the SweetLife Fruits & Jams company. You need to configure case management functionality in the SweetLife Self-Service Portal to give customers the ability to submit and track cases.

Enabling required features

1- Under the ERP Enable/Disable Features form, we need to enable:

- Customer Portal
 - Case Management on Portal
 - Financials on Portal

System Preparation

Internal Flag Definition

Where is it found:

- *Case Classes*
- *Contact Classes*
- *Business Account Classes [...]*

For this lesson we need to make sure:

- *Contact Classes* – **STORE** is visible in Portal
- *Case Classes* – **JREPAIR** and **DELIVERY** are visible in Portal along with their **Attributes**
- *Business Account Classes* - **STORE BA** is visible in Portal

Case Management Settings and New Comment Email Notifications

Under the Self-Service Portal, we need to set the required configuration for the Case Management

Login to Portal site and Open the Portal Preferences (SP800000) From:

Set the below:

- Default Case Class to **JREPAIR**
- Priority to **Medium**
- Default Contact Class to **STORE**
- Case Activity Notification Template to **New Case Comment from Portal**
- **Save**

Create a Case in Self-Service Portal

Sign in as Ray using his credentials: ray.newman@storehut.example.com

Open Support Workspace and click on **New Case**

- Set priority to **Medium**
- Class ID to **DELIVERY**
- Subject to **Delivery of the missing 5 jars of apple jam.**
- Under Details copy the content in the guidebook: **Hi! The order of 15 jars each of pear, plum, and apple jam was not delivered in full because only 10 jars of apple jam were provided. Please deliver the missing 5 jars of apple jam.**
- Under Attributes tab, set the value to **Apple jam 32 oz.**
- Submit

Add a comment to a Case in Self-Service Portal and Verify Email

Keep on using Ray's credentials: ray.newman@storehut.example.com on the Self-Service Portal

Open Support Workspace and click on **Open Cases**

- Clear the **Me** checkbox to reveal all cases created by Employees of **Storehut**
- Select the Entry with **Request for juicer repair from Storehut** to open the Case Details form
- Click **Add Comment**
 - Set Summary to **Appointment**.
 - **You can come on Monday or Tuesday, anytime from 9 AM to 4 PM. Thanks!**
 - **Save & Close**

Switch to ERP & sign-in as Gibbs

Open **All Email** (CO409070) form and open the All Records Tab

Check the Email with New Comment in the case you just added a comment to

Yesterday's Questions

Q: Is there an import scenario for updating contacts to add user roles in masse?

- Yes, there is and it can be done from under the User Types form.
- You can define a new Role and include it under the User Type - Allowed Roles as a Default Role
- Then you can click on **Apply to Users**: Applies the default roles to all users of the selected user type.

Q: Can this (user definition) process be used for employee self service portal?

- The employee is a different entity under the ERP and usually when a user is created for an employee, the linked entity is the employee record.
- Also, for employees with a user, there is no need to have a user type (also possible) as all the roles in the system would be available to be allocated.

Day 3

Agenda

August 23, 2023 -10:00-11:00 AM PT

Day 3

Lesson 5: Tailoring the Self-Service Portal

Lesson 5: Tailoring the Self-Service Portal

Learning Objectives

In this lesson, you will learn how to do the following:

- Create a generic inquiry
- Create and design a dashboard in the Self-Service Portal
- Create a workspace in the Self-Service Portal

Create a generic inquiry in the Self-Service Portal

Define new Generic Inquiries under the **Generic Inquiry (SM208000) form**

Define Table Relations, Parameters, Conditions, Result Grid, Entry Point...

Define who can see this Inquiry

Note: the recommended way to create an inquiry is to create a copy of an existing, predefined inquiry and modify the copy as seen fit

Tailoring the Self-Service Portal: To Create a Generic Inquiry

Suppose that you are Kimberly Gibbs, a system administrator who also handles generic inquiries at the SweetLife Fruits & Jams company. You need to create a generic inquiry that will display the list of cases for the business account associated with the user. There is a predefined generic inquiry in Acumatica ERP that provides similar functionality. You need to copy it and adjust it for the Acumatica Self-Service Portal users. This inquiry will be used in the future for building a dashboard.

Process for creating a generic inquiry in the Self-Service Portal

Sign-in to the Portal using the admin account

- Open the Generic Inquiry Form and Look for **Inquiry Title** CR-Cases
- Select Clipboard - Copy in the Menu
- Select Add New icon and set Inquiry title as **PortalCases**.
- Select Clipboard - Paste in the Menu
- Go to Navigation Tab and delete both entries under the Navigation Targets
 - In the link column, click the row then click Delete Row
- Go to Entry Point Tab, set Entry Screen to **Case Details** Save

(Now you have a copy of the existing inquiry)

Modifying a generic inquiry in the Self-Service Portal - **Adding DACs**

Open **Tables** Tab, click Add Row and Add below 2 rows and then Save

1. Set Table Name to **PX.Objects.CR.Contact** and Alias to **CustomerUser**
2. Set Table Name to **PX.Objects.CR.CRCaseClass** and Alias to **CaseClass**.

TABLES								RELATIONS	PARAMETERS	CONDITIONS	GROUPING	SORT ORDER	RESULTS GRID	ENTR									
* Table Name								Description								* Alias							
				ADD RELATED TABLE																			
		PX.Objects.CR.BAccount						Represents a business account used ...						BAccount									
		PX.Objects.CR.Contact						Depending on the type, represents a r...						Contact									
		PX.Objects.CR.Contact						Depending on the type, represents a r...						CustomerUser									
		PX.Objects.CR.CRActivityStatistics												CRActivityStatistics									
		PX.Objects.CR.CRCase						Represents a case (also referred to a...						CRCase									
		PX.Objects.CR.CRCaseClass												CaseClass									

Modifying a generic inquiry in the Self-Service Portal: **Define Relations between DACs**

Open Relations Tab - In the **Table Relations** Toolbar add below 2 rows

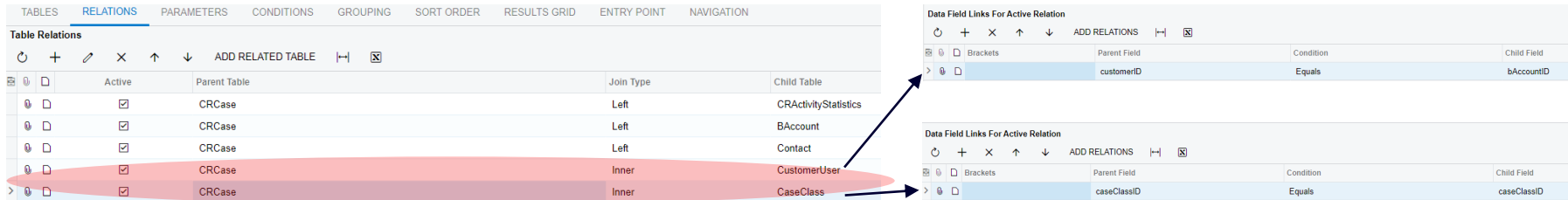
- Set Parent Table as **CRCase** and Child Table as **CustomerUser**.
- Set Parent Table as **CRCase** and Child Table as **CaseClass**.
- **Save**

Click the Entry with **CustomerUser** in the Child Table column, then on the **Data Field Links For Active Relation** table toolbar click **Add Row**:

- Set Parent Field to **CustomerID EQUALS** Child Field to **BAccountID** - **SAVE**

Click the Entry with **CaseClass** in the Child Table column, then on the **Data Field Links For Active Relation** table toolbar click **Add Row**:

- Set Parent Field to **CaseClassID EQUALS** Child Field to **CaseClassID** - **SAVE**



The image shows two screenshots of the software interface. The left screenshot is the 'Table Relations' toolbar, which has a table with the following data:

Active	Parent Table	Join Type	Child Table
<input checked="" type="checkbox"/>	CRCase	Left	CRActivityStatistics
<input checked="" type="checkbox"/>	CRCase	Left	BAccount
<input checked="" type="checkbox"/>	CRCase	Left	Contact
<input checked="" type="checkbox"/>	CRCase	Inner	CustomerUser
<input checked="" type="checkbox"/>	CRCase	Inner	CaseClass

The right screenshot is the 'Data Field Links For Active Relation' toolbar, which has a table with the following data:

Parent Field	Condition	Child Field
customerID	Equals	bAccountID

Below this is another instance of the 'Data Field Links For Active Relation' toolbar with the following data:

Parent Field	Condition	Child Field
caseClassID	Equals	caseClassID

Arrows in the image point from the 'CustomerUser' and 'CaseClass' rows in the 'Table Relations' toolbar to the corresponding 'Data Field Links For Active Relation' toolbars.

Modifying a generic inquiry in the Self-Service Portal - **Adding Conditions**

Open **Conditions** Tab, Click Add Row:

1. Set Data Field to **CustomerUser.UserID**
 2. Set Condition to **Equals**
 3. Select From Schema checkbox and set Value 1 to **@me**
1. Add Another Row with:
 1. Set Data Field to **CaseClass.IsInternal**
 2. Set Condition to **Does Not Equal**
 3. Select From Schema checkbox and Value 1 to Selected
 2. Save New Rows

TABLES	RELATIONS	PARAMETERS	CONDITIONS	GROUPING	SORT ORDER	RESULTS GRID	ENTRY POINT	NAVIGATION
		Active	Brackets	Data Field	Condition	From Schema	Value 1	
		<input checked="" type="checkbox"/>		CustomerUser.UserID	Equals	<input checked="" type="checkbox"/>	@me	
		<input checked="" type="checkbox"/>		CaseClass.IsInternal	Does Not Equal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Modifying a generic inquiry in the Self-Service Portal - **Editing Navigation**

Open **Navigation** Tab:

1. On the Navigation Targets, select **New Tab** in the Window Mode column for the entry with SP203010 – Case Details
2. Save

Navigation Targets		
Active	* Link	Window Mode
<input checked="" type="checkbox"/>	SP203010 - Case Details	New Tab

Open **Results Grid** Tab:

1. Find the row with **CaseCD** data field selected
2. Set Navigate To column to **SP203010 - Case Details**.
3. Save.

TABLES	RELATIONS	PARAMETERS	CONDITIONS	GROUPING	SORT ORDER	RESULTS GRID	ENTRY POINT	NAVIGATION		
Row Style: <input type="text"/>										
		Active	Object	Data Field	Schema Field	Width (px)	Style	Visible	Default Navigation	Navigate To
		<input checked="" type="checkbox"/>	CRCase	CaseCD				<input checked="" type="checkbox"/>	<input type="checkbox"/>	SP203010 - Case Details

Making the Generic Inquiry Visible for Self-Service Portal Users

While still viewing the generic Inquiry:

- Select **Set the Make Visible on the UI**
- Set Site Map Title to **All Cases**
- Set Workspace to **Support**
- Keep Category value as **Inquiries**
- **Save**

Sign out from the admin account

login as Ray (ray.newman@storehut.example.com) and verify the Inquiry under Support Workspace

Tailoring the Self-Service Portal: To Create and Design a Dashboard

Suppose that you are Kimberly Gibbs, a system administrator who also handles dashboards at the SweetLife Fruits & Jams company. You need to create the new Case Activities dashboard based on a request from a SweetLife customer, the Storehut chain of supermarkets in New York. On the dashboard, the customer's managers should be able to monitor cases reported to SweetLife and have quick access to orders.

Creating & Designing a Dashboard in the Self-Service Portal – **Create & Set Up User Access**

Open Dashboards (SM208600) form:

- Set Name to **Case Activities**
- Owner Role to **Portal Admin**
- Clear the **Allow Users to Personalize** option
- Select the **Make Visible on the UI**
- **Site Map Title** will have the same value as the **Dashboard Name**
- Set Workspace to **Support**
- Keep Category as **Dashboards**
- **Save**

Open **Visible To** tab:

- Set **Granted** Access Right for Row having the **Portal Admin** Role
- Set **Granted** Access Right for Row having the **Customer Admin** Role
- Set **Granted** Access Right for Row having the **Customer User** Role
- **Save**

Creating & Designing a Dashboard in the Self-Service Portal – Add Table Widget

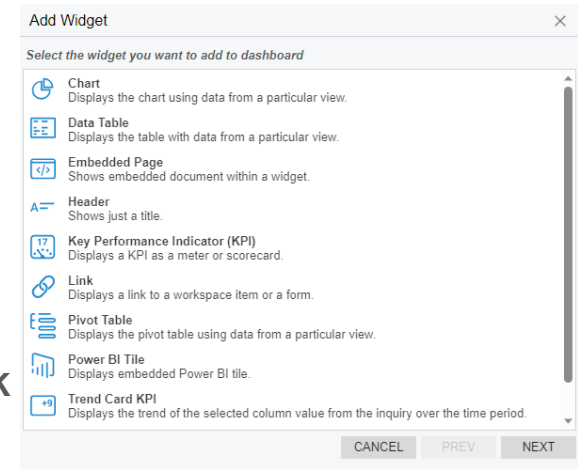
Select **View** to Open the Design Form then click **Design** Button

Select **Add a new widget** in the widget placeholder form:

- Click **Data Table** then **Next**

In the **Widget Properties** screen set the below:

- Inquiry Screen to **Open Cases**
- Open the **Inquiry Parameters** and clear the **Me** checkbox, the **OK**
- Select **Automatically Adjust Height** check box.
- Open **Column Settings**, Make sure **Selected Columns** list have only:
Subject, Status, Reason, Severity, Priority, and Contact. Then Click **OK**
- Set Caption to **open cases**
- Click **Finish** then Click **Design** to view the Dashboard with the Data table



Creating & Designing a Dashboard in the Self-Service Portal – Add Order Link Widget


Click **Design** again to switch to Design Mode

Click **Add new widget** click **Link** under the **Add Widget**, and then **Next**

In the **Widget Properties** screen set the below:

- Icon to **visibility**
- Form to **My Orders**.
- Caption to **My Orders**
- Click **Finish** then Click **Design** to view the Dashboard with the Open Cases Table & My Orders link

Case Activities REFRESH ALL DESIGN TOOLS ▾

OPEN CASES  My Orders

* Subject	Status	Reason	Severity	Priority	Contact
Billing plan	Open	In Process	High	High	
Statement request	New	Unassigned	Medium	Medium	
Repair of a juicer for Deliclou...	New	Unassigned	Medium	Medium	Diane Doe
Delivery of missing parts for J...	New	Unassigned	Low	Medium	Michelle Evans
Questions about specification...	New	Unassigned	Medium	Medium	Bruce Ward
Repair of JUICER15	New	Unassigned	Medium	Medium	Michelle Evans
Request for compatibility of a ...	New	Unassigned	Medium	Medium	Chuck Heater
Request for juicer repair from ...	New	Unassigned	Medium	Medium	Tonya Lawrence
Which vegetables can be juic...	Open	In Process	Medium	Medium	Beverly Hall
Comparison of the juicers	Open	In Process	Low	Medium	Tonya Lawrence
A new citrus juicer cannot be ...	New	Unassigned	Medium	Medium	Tonya Lawrence
Cleaning and maintenance of...	New	Assigned	Medium	Medium	Tonya Lawrence
Delivery of the missing 5 jars ...	New	Unassigned	Medium	Medium	Ray Newman

Creating & Designing a Dashboard in the Self-Service Portal – **Add KPI Widget**

Click **Design** again to switch to Design Mode

Click **Add new widget** click **Key Performance Indicator (KPI)** under the Add Widget, and then **Next**

In the **Widget Properties** screen set the below:

- Inquiry Screen to **All Cases**
- Field to Aggregate to **Case ID**.
- Aggregate Function to **Count All**
- Normal Level Type to **Fixed Value**
- Normal Level to **10**
- Alarm Level Type to **Percent value**
- Alarm Level to **140**
- Define Colors:
 1. Normal Color: Green
 2. Warning Color: Orange
 3. Alarm Color: Red
- Visualization Type to **Meter**
- Caption to **case volume**

Click **Finish** then Click **Design** to view the Dashboard

Figure: The Case Activities dashboard with the KPI widget of the Meter visualization type

Case Activities

REFRESH ALL DESIGN TOOLS ▾

OPEN CASES

[My Orders](#)

* Subject	Status	Reason	Severity	Priority	Contact
Billing plan	Open	In Process	High	High	
Statement request	New	Unassigned	Medium	Medium	
Repair of a juicer for Delicious ...	New	Unassigned	Medium	Medium	Diane Doe
Delivery of missing parts for JU...	New	Unassigned	Low	Medium	Michelle Evans
Questions about specification ...	New	Unassigned	Medium	Medium	Bruce Ward
Repair of JUICER15	New	Unassigned	Medium	Medium	Michelle Evans
Request for compatibility of ac...	New	Unassigned	Medium	Medium	Chuck Hester
Request for juicer repair from ...	New	Unassigned	Medium	Medium	Tonya Lawrence
Which vegetables can be juice...	Open	In Process	Medium	Medium	Beverly Hall
Comparison of the juicers	Open	In Process	Low	Medium	Tonya Lawrence
A new citrus juicer cannot be tu...	New	Unassigned	Medium	Medium	Tonya Lawrence
Cleaning and maintenance of j...	New	Assigned	Medium	Medium	Tonya Lawrence
Delivery of the missing 5 jars o...	New	Unassigned	Medium	Medium	Ray Newman

CASE VOLUME



Creating & Designing a Dashboard in the Self-Service Portal – **Add Scorecard KPI Widget**

Click **Design** again to switch to Design Mode

- Point to the **Case Volume** widget and click **Copy** icon
- In A widget placeholder, click **Paste from clipboard**, then click **edit**
- In the **Widget Properties**, click **Filter Setting**
 - Click **Add Row** and set
 - Data Field to **Status**
 - Conditions to **Equals**
 - Value 1 to **New**
 - Click **Add Row** and set
 - Data Field to **Reason**
 - Conditions to **Equals**
 - Value 1 to **Unassigned**
 - Click **Ok**
 - Normal Level to **2**
 - Visualization type to **Scorecard**
 - Icon to **access time**
 - Caption to **unassigned cases**
- Click **Finish**

Creating & Designing a Dashboard in the Self-Service Portal – **Add Scorecard KPI Widget**

- Point to the **unassigned cases** widget and click **Copy** icon
- In A widget placeholder, click **Paste from clipboard**, then click **edit**
- In the **Widget Properties**, click **Filter Setting**
 - In the Row with **Reason** as **Data Field**, set
 - Value 1 to **Assigned**
 - Click **Ok**
 - Set Icon to **arrow drop down circle**
 - Caption to **assigned cases**
- Click **Finish**
- Click **Design** to switch to view mode

Figure: The Case Activities dashboard with the KPI widgets

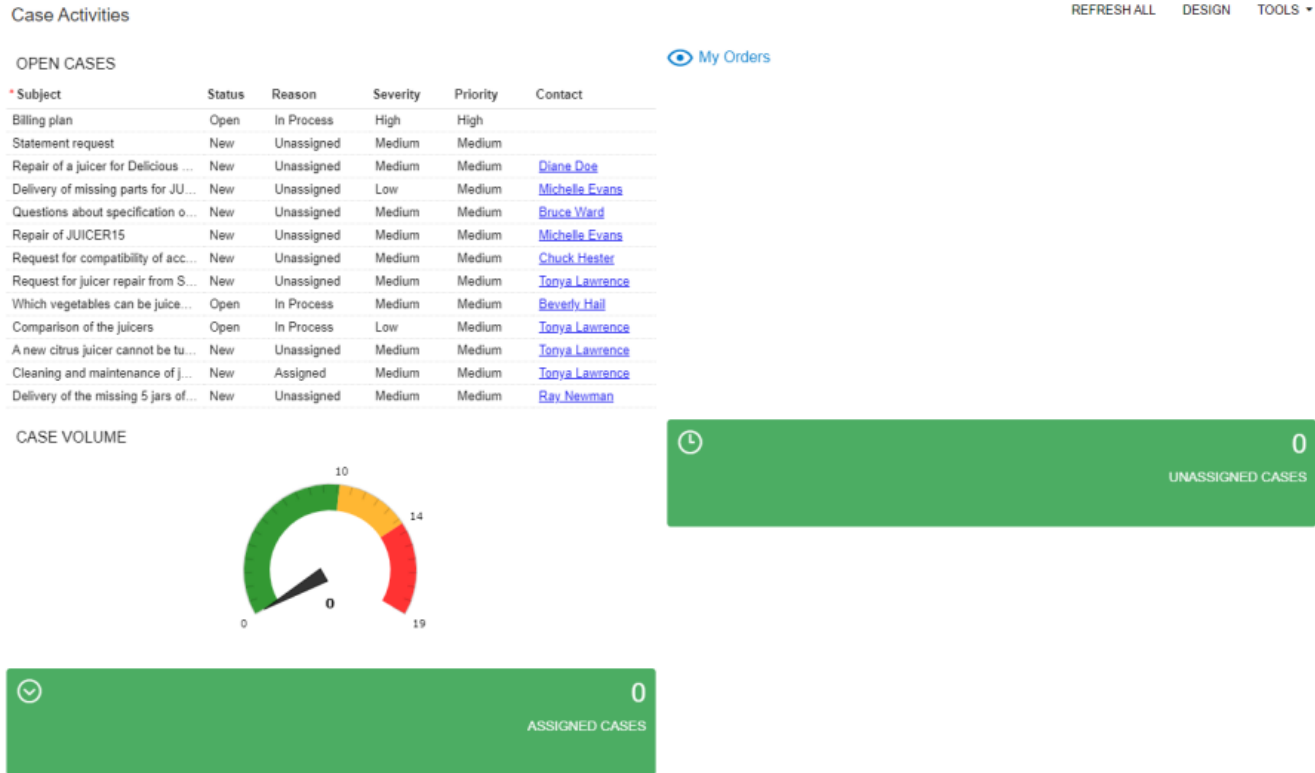


Figure: The new layout of the Case Activities dashboard

Edit Layout and rearrange widgets

Case Activities

REFRESH ALL DESIGN TOOLS ▾



[My Orders](#)

OPEN CASES

* Subject	Status	Reason	Severity	Priority	Contact
Billing plan	Open	In Process	High	High	
Statement request	New	Unassigned	Medium	Medium	
Repair of a juicer for Delicious En...	New	Unassigned	Medium	Medium	Diane Doe
Delivery of missing parts for JUIC...	New	Unassigned	Low	Medium	Michelle Evans
Questions about specification of J...	New	Unassigned	Medium	Medium	Bruce Ward
Repair of JUICER15	New	Unassigned	Medium	Medium	Michelle Evans
Request for compatibility of acces...	New	Unassigned	Medium	Medium	Chuck Hester
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Cleaning and maintenance of juicers	New	Assigned	Medium	Medium	Tonya Lawrence
Delivery of the missing 5 jars of ap...	New	Unassigned	Medium	Medium	Ray Newman

CASE VOLUME



Verify Dashboard is Visible for Self-Service Portal Users

login as Tonya (tonya@storehut.example.com)

verify the Dashboard under Support Workspace / Dashboard Category

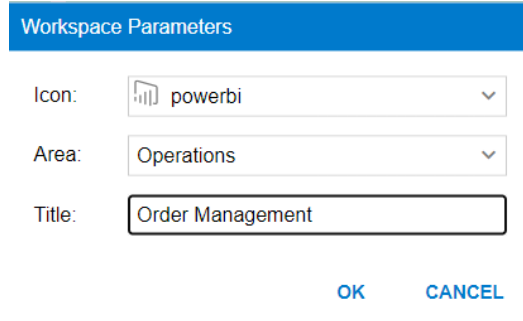
Tailoring the Self-Service Portal: To Configure a Workspace

Suppose that you are Kimberly Gibbs, a system administrator who also manages workspaces, at the SweetLife Fruits & Jams company. Your colleague David Chubb has received a request from a customer, the Storehut chain of supermarkets in New York, about the customization of SweetLife's Self-Service Portal. You need to create a new workspace for Storehut's purchase managers in SweetLife's Self-Service Portal to give the managers the ability to monitor detailed information about their orders.

Create a workspace and Editing Menu in the Self-Service Portal

On the self-service portal, bottom left corner click the 3 dots (Open Configuration Menu) and click on **Edit Menu**

- Click **ADD WORKSPACE** and then set
 - Icon to **powerbi**
 - Area to **Operations**
 - Title to **Order Management**
 - Click **OK**



Workspace Parameters

Icon:

Area:

Title:

OK CANCEL

Click **Exit Menu Editing**

- Empty workspace is not displayed in the Menu
- A Workspace can be modified by:
 - Changing its name
 - Adding new link to a Form, Report, or Dashboard
 - Moving a link to a different category

Modifying a workspace: **Renaming Predefined Workspace & Rearranging Workspace Menu Items**

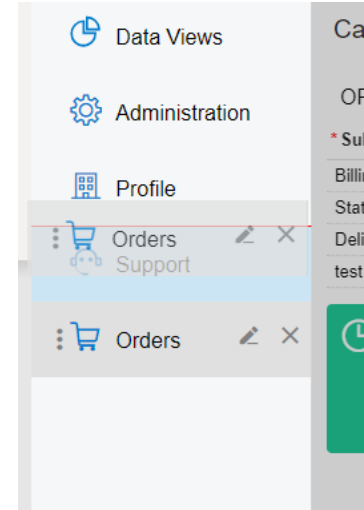
click on **Edit Menu** again

- Point to **Order Management** workspace and click the edit icon to its right
 - In the Workspace Parameters dialog box, change the Title to **Order Manager**
 - Click **Ok** and click on **Exit Menu Editing**



To Rearrange Workspace menu items, click on the **Edit Menu** again

- **Drag the Items as you see fit**
- To Save the changes, Click on **Exit Menu Editing**



Modifying a workspace: **Adding Links**

Switch back to **Edit Menu** again

- Click the new Order Manager workspace
- At the top, click on **Add Menu Item**
- Select the checkboxes next to the Forms:
 - Case Activities /Catalog/ Company Profile/ Contract/ Customer Contact/ My Documents/ User Profile
 - Add & Close
- Select Pin to Main Menu Panel icon (Top Right)

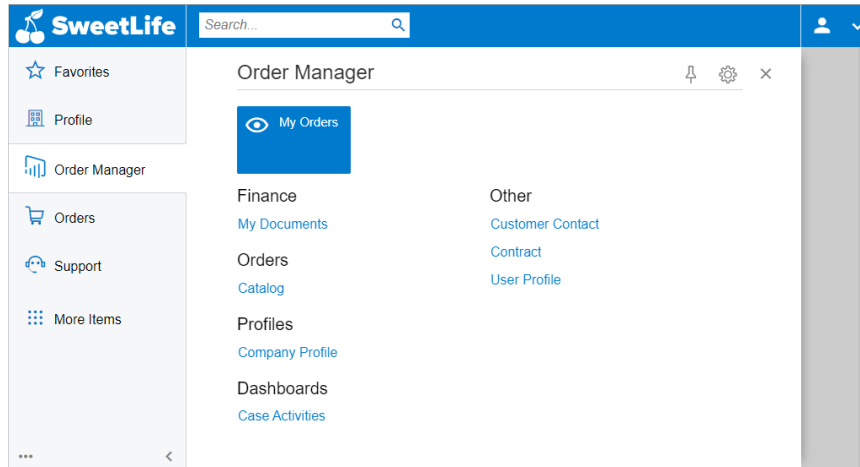
Exit Edit Mode

Modifying a workspace: **Adding Tiles**

Switch back to **Edit Menu** again

- Click the new Order Manager workspace
- At the top, click on **Add Tile** and set the below parameters:
 - Icon to **Visibility**
 - Title to **Order**
 - Form to **SP700003 - My Orders**
 - Click **OK**

Exit Edit Mode



Modifying a workspace: **Creating Categories & Rearranging links**

Switch back to **Edit Menu** again

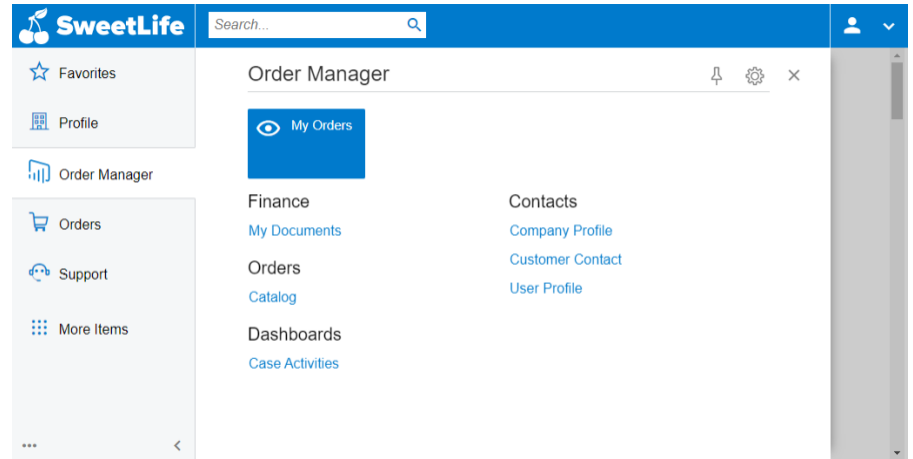
- Click **Menu Settings** on the top right
- At the top, click on **Add Tile** and set the below parameters:
 - Click **Add Category**
 - Set Title to **Contacts** and click **OK**
 - close **Menu Settings**
- Select Order Manager Workspace
- Click on the edit icon shows when you point at **Customer Contact** link
 - Set the Category to the newly Created **Contacts** Category and Click **OK**
 - You can drag **User Profile** and **Company Profile** Links under the Contacts category
 - You can also rearrange links under a category: Drag the Company Profile link before the Customer Contact link

Modifying a workspace: **Deleting a link from Workspace**

While Still in **Edit Menu** mode under the **Order Manager** workspace

- Point at the **Contract** link under the **Others** category
- Click the **Delete** Icon and confirm by clicking **OK**

Exit Edit Mode



A category is hidden when it is empty

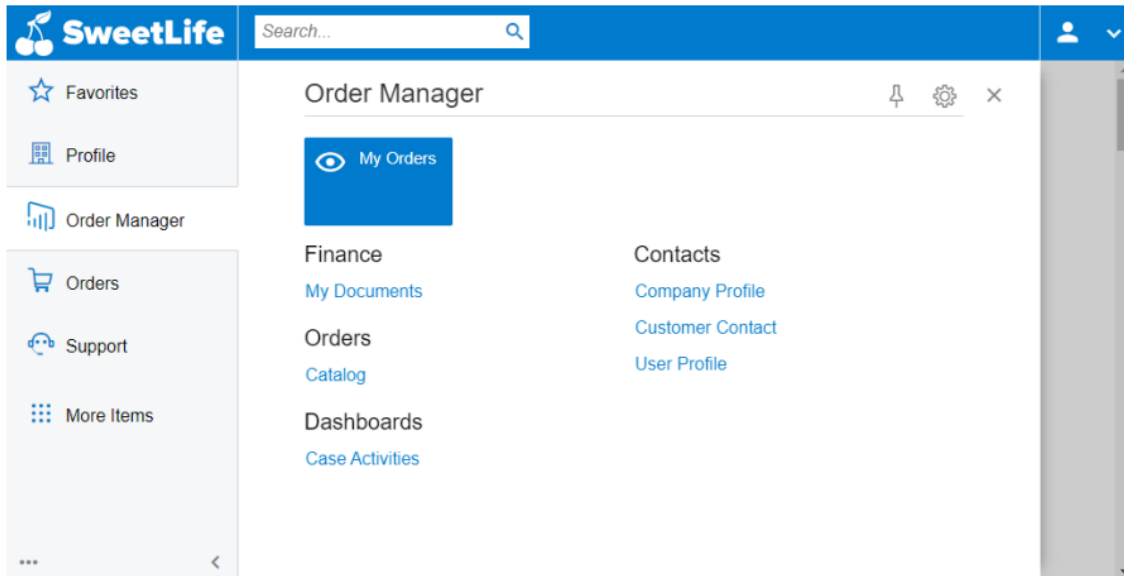
To Delete a workspace, you can select the Delete Icon shown when you point at the workspace

Verify Workspace configuration for Portal Users

Sign in as Tonya to the portal tonya@storehut.example.com

Verify the new Workspace with its Tile, Categories, and Links are shown as configured

Check the Case Activities Dashboard





Thank you!

Hekmat Dalloul