



BEA WebLogic Portal™

WebLogic Portlets for Siebel User Guide

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WebLogic Portlets for Siebel User Guide

This guide, which shows you how to use the WebLogic Portlets for Siebel, includes the following sections:

- [Introduction](#)
- [Getting Started with WebLogic Portlets for Siebel](#)
- [Login Portlet](#)
- [Sales Order Portlet](#)
- [Service Request Portlet](#)
- [My Accounts Portlet](#)
- [My Team Accounts Portlet](#)
- [Agreements By Expiry Date Portlet](#)
- [All Assets By Account Portlet](#)
- [Contacts By Account Portlet](#)
- [Customer List with Address Info Portlet](#)
- [Repair Status Portlet](#)
- [RMA Order Status Portlet](#)

This guide assumes that you have working knowledge of the following:

- WebLogic Portlets for Siebel
- BEA WebLogic Platform 8.1
- Siebel 7.0.4

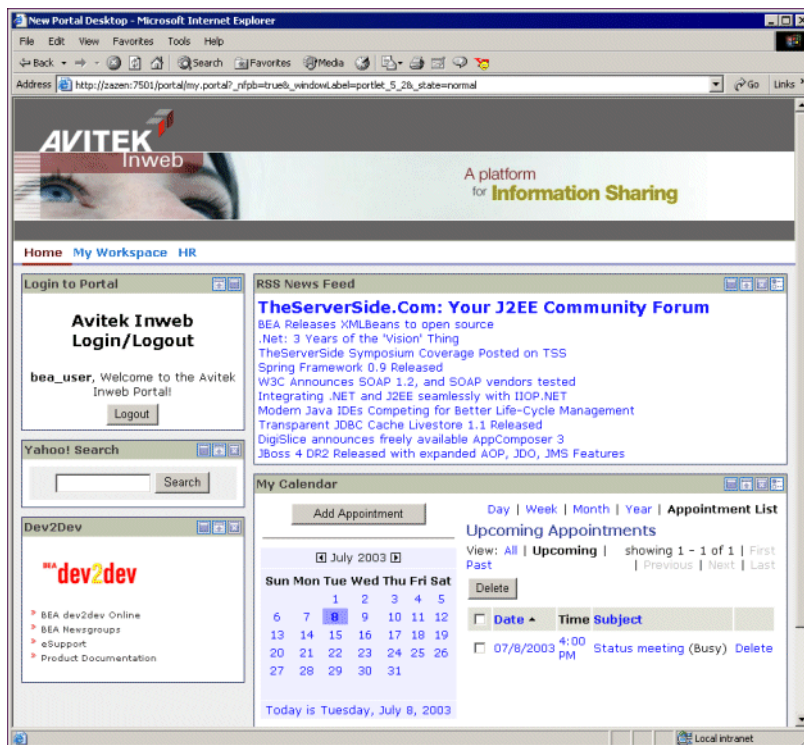
Introduction

Since the dawn of World Wide Web users have been accessing one Web page at a time. And that's been just fine. At first, excitement over the ability to provide platform-agnostic content to all users with network access or an Internet connection overshadowed any drawbacks or inadequacies with the new technology. Later, emerging technologies such as Java, JavaScript, and application servers provided application functionality, usability, stability, and performance improvements that have been the mainstay of Internet computing.

Now organizations need more. They want to not only surface their legacy applications, processes, and data in a Web interface, but they want to be able to do so more than one page at a time. They want portals.

A portal is a powerful Web site that gives users a single point of access to applications and information in a unified interface. A portal lets users view each application or Web page in its own window, called a portlet, and a single browser window can contain multiple portlets. For example, a portal page can contain portlets for logging in, searching, displaying news feeds, and managing appointments with a calendar application, as shown in the following Figure.

Figure 1 Portal desktop



Portlets are arranged or grouped on portal pages, and users can easily navigate among pages with page tabs, drop-down menus, or other mechanisms to access the portlets they want. The portal in Figure 1 contains three pages: Home, My Workspace, and HR, whose links appear just above the Login portlet.

Siebel 7.0.4- WebLogic Portlets for Siebel automates change and product content propagation related business processes that span across Siebel 7.0.4 and WebLogic Portlets for Siebel.

Business Goals of WebLogic Portlets for Siebel

Business Requirements addressed by WebLogic Portlets for Siebel at a high level are:

- Integrating Siebel 7.0.4 with WebLogic Portlets for Siebel.
- Facilitating real time collaborative practices between organization partners by transferring information from Siebel 7.0.4 to WebLogic Portlets for Siebel.

- Ensuring a smooth and fast Product Content propagation in high volume transactions scenario.

Key Features of WebLogic Portlets for Siebel

Key design goals of WebLogic Portlets for Siebel are:

- Easy to Deploy
- Easily Configurable to suit varying business needs
- Easy to Monitor
- Easy to Maintain with application upgrades

WebLogic Portlets for Siebel supports the following business processes:

Table 1 List of business processes for BEA WebLogic Portlets

| S.No. | Business Process |
|-------|---|
| 1. | Sales Order (View, Edit, and Create) |
| 2. | Shipping Status (View, Edit, and Create) |
| 3. | Service Request (View, Edit, and Create) |
| 4. | Service Request Activity (View, and Create) |
| 5. | My Accounts (View, Edit, and Create) |
| 6. | My Team Accounts (View) |
| 7. | Agreements By Expiry Date (View) |
| 8. | All Assets By Account (View) |
| 9. | Contacts By Account (View and Edit) |
| 10. | Customer List With Address Info (View and Edit) |
| 11. | Repair Status (View) |
| 12. | RMA Order Status (View) |

Acronyms, Abbreviations, and Definitions

Table 2 List of Acronyms, Abbreviations, and Definitions for BEA WebLogic Portlets

| Acronym | Definition |
|---------|-------------------------------|
| BO | Business Objects |
| ERP | Enterprise Resource Planning |
| RMA | Return Material Authorization |
| BC | Business Component |

Supported Platforms

BEA WebLogic Suite 8.1

Product Life Cycle Management Applications

Siebel 7.0.4

Operating Systems

Windows NT, Windows 2000, Windows 2000 Server and Windows XP

Process Flow

Follow the steps given below to complete the flow from BEA WebLogic Suite 8.1 to Siebel Applications through WebLogic Portlets for Siebel.

Start the web server (/).

Logon to WebLogic Portlets for Siebel (Optional).

Viewing, and Editing the Sales Orders etc., that are created from WebLogic Portlets for Siebel and, which are to be transferred to Siebel Applications instance.

Once the Sales Order is created successfully you can view the details in the Siebel Applications instance.

Getting Started with WebLogic Portlets for Siebel

To start WebLogic Portlets for Siebel, open Internet Explorer and type the following URL:

`http://<WebLogic Portlets for SiebelServer>:<port>/<project name>/<Portal file>`

For example:

`http://siebelserver:7001/beaportal/BEAPortalNet.portal`

The login page appears.

Note: The parameters in the URL are to be replaced by actual values.

Login Portlet

The login screen is used to authenticate the user. Only those users who have a valid authentication are allowed to login.

Figure 2 WebLogic Portlets for Siebel Login Screen



Username

Enter Username to log into the WebLogic Portlets for Siebel.

Password

Enter the Password details. The user may note that the password details entered are not visible instead an asterisk (*) is displayed for each and every keystroke entered by the user. Since, this field is case sensitive the user should ensure that the Caps Lock key is set to off mode from the keyboard.

Sign In

Click on Sign In after the Username and Password details are entered to successfully login to WebLogic Portlets for Siebel.

In order to log into WebLogic Portlets for Siebel system, the user should be of one of the following user type:

- Administrator

- Employee
- Customer

It is advised that the user refer to the BEA WebLogic Portlet Administration Guide. The guide details how to create a user, group and assign privileges, and so on.

The privileges, which are available for an Administrator, are not available to Employee and Customer. The details displayed on the Portlets vary depending on the user type selected.

In this user guide we will select the user type as Employee, which will contain all the privileges of a Customer and some more details as compared to a Customer.

After successfully logging into the WebLogic Portlets for Siebel a screen as illustrated in the following figure is displayed:

Figure 3 List of Portlets for the WebLogic Portlets for Siebel Screen

Sales Order

Create New Sales Order

<

Note: The user may note that by default no records are displayed for most of the portlets. The user is required to click on Edit Preferences hyperlink and then need to configure from the respective portlets.

Use scroll bar to navigate through the Portlets. The following is the list of Portlets for the WebLogic Portlets for Siebel:

- Sales Order
- Shipping Status
- Service Request
- Service Request Activity
- My Accounts
- My Team Accounts
- Agreements By Expiry Date
- All Assets By Account
- Contacts By Account
- Customer List With Address Info
- Repair Status
- RMA Order Status

The Portlets are discussed in the following pages. We begin with Sales Order Portlet:

Sales Order Portlet

The following operations that can be performed from the Sales Order Portlet:

- To View an existing Sales Order
- To Edit / Update an existing Sales Order
- To Create a new Sales Order and

Note: The user may note that the Sales Order Portlet is the first Portlet displayed after valid authentication.

Viewing an existing Sales Order






In order to view details for an existing Sales Order scroll to the Sales Order Portlet a screen as illustrated in the following figure is displayed:

Figure 4 WebLogic Portlets for Siebel Sales Order Portlet Screen

Sales Order

Create New Sales Order

Edit Preferences

| Action | Order # | Order Date | Ship Date | Currency | Status | Amount | Sales Rep | Customer Name | Priority |
|---|--------------------------|------------|------------|----------|------------|--------|-----------|---------------|----------|
|  | 1-120901 | 07/17/2004 | 10/30/2004 | USD | In-transit | 63 | DAVES | Oracle | Medium |
|  | 1-119601 | 07/17/2004 | 07/20/2005 | USD | Booked | 50.8 | DAVES | FinalTest1 | High |
|  | 1-119501 | 07/17/2004 | 07/14/2006 | USD | Open | 0 | DAVES | DELL111 | Medium |
|  | 1-119301 | 07/17/2004 | 07/31/2004 | USD | Open | 0 | DAVES | | Medium |
|  | 1-113201 | 07/16/2004 | 07/31/2004 | USD | Open | 12025 | DAVES | Oracle | Medium |

1 - 5 of 19

Shipping Status

Please Click On the Status of 'Sales Order' Portlet to Begin

Click the Order # hyperlink to view details for the required Sales Order. And the Siebel screen for the selected Sales Order is displayed.

Figure 5 WebLogic Portlets for Siebel Sales Order Portlet – Siebel Sales Order details Screen

File Edit View Help powered by SIEBEL

Home Opportunities Accounts Contacts Activities Calendar Quotes Forecasts Revenues Compensation Employees Products Info Center

Show: My Sales Orders History Queries: All Orders this Week

Order #

Sales Orders

New Query Fulfill All 1 - 1 of 1

| State | Order # | Type | Status | Priority | Order Date | Account | Last Name | First Name |
|--------|----------|-------------|--------|----------|---------------------|---------|-----------|------------|
| [icon] | 1-120601 | Sales Order | Open | Medium | 7/17/2004 4:43:09 A | Oracle | Aceman | Mark |

More Info Line Items Terms Payment Attachments Charts

New Query 1 of 1

*Order #: 1-120601

*Type: Sales Order

Account: Oracle

Site: San Francisco

Priority: Medium

*Status: Open

Last Name: Aceman

First Name: Mark

Team: SADMIN

Organization: Default Organization

*Currency: USD

Price List: Default_Vith_Discount

Description:

Opportunity:

Quote #:

SR #:

0 of 0

The fields displayed are self-explanatory. After viewing the details click close to quit from the Siebel screen.

Viewing an existing Customer

In order to view details for an existing Customer scroll to the Sales Order Portlet a screen as illustrated in the following figure is displayed:

Figure 6 WebLogic Portlets for Siebel Sales Order Portlet Screen

Sales Order

Create New Sales Order

Edit Preferences

| Action | Order # | Order Date | Ship Date | Currency | Status | Amount | Sales Rep | Customer Name | Priority |
|--------|----------|------------|------------|----------|------------|--------|-----------|---------------|----------|
| | 1-120901 | 07/17/2004 | 10/30/2004 | USD | In-transit | 63 | DAVES | Oracle | Medium |
| | 1-119601 | 07/17/2004 | 07/20/2005 | USD | Booked | 50.8 | DAVES | FinalTest1 | High |
| | 1-119501 | 07/17/2004 | 07/14/2006 | USD | Open | 0 | DAVES | DELL111 | Medium |
| | 1-119301 | 07/17/2004 | 07/31/2004 | USD | Open | 0 | DAVES | | Medium |
| | 1-113201 | 07/16/2004 | 07/31/2004 | USD | Open | 12825 | DAVES | Oracle | Medium |

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Shipping Status

Please Click On the Status of 'Sales Order' Portlet to Begin

Click the Customer Name hyperlink to view details for the required Customer. And the Siebel screen for the selected Customer is displayed.

Figure 7 WebLogic Portlets for Siebel Sales Order Portlet – Siebel Customer details Screen

Siebel Sales - Microsoft Internet Explorer

File Edit View Help

Home Opportunities Accounts Contacts Activities Calendar Quotes Forecasts Revenues Compensation Employees Products Info Center Training Brief

Show: All Accounts History: Queries: All Accounts

Account:

Accounts

| New | Name | Site | Main Phone # | Territories | Industries | Status | URL |
|-----|--------|--------------|----------------|-------------|------------|--------|----------------|
| | Oracle | SanFrancisco | (412) 230-9089 | | | Active | www.oracle.com |

More Info Activities Assets Attachments Contacts ESP Notes Opportunities Profile Revenues Service Profile Service Requests Account D&D Reports

Name: Oracle

Site: SanFrancisco

Main Phone #: (412) 230-9089

Main Fax #: (412) 230-9088

Current Volume:

Potential Volume:

Account Team: ADMIN

Parent:

Account Type: Customer

Status: Active

Stages:

Expertise:

Partner:

Competitor:

Reference:

PO Approved:

The fields displayed are self-explanatory. After viewing the details click Close to quit from the Siebel screen.

To Edit / Update an existing Sales Order Shipping Status

In order to update details for the Sales Order Shipping Status scroll to the Sales Order Portlet and then click Status hyperlink. A screen as illustrated in the following figure is displayed:

Figure 8 WebLogic Portlets for Siebel – Sales Order Shipping Status Portlet Screen

| Sales Order | | | | | | | | | |
|------------------------|----------|------------|------------|----------|------------|--------|-----------|------------------|----------|
| Create New Sales Order | | | | | | | | Edit Preferences | |
| Action | Order # | Order Date | Ship Date | Currency | Status | Amount | Sales Rep | Customer Name | Priority |
| | 1-120901 | 07/17/2004 | 10/30/2004 | USD | In-transit | 63 | DAVES | Oracle | Medium |
| | 1-119601 | 07/17/2004 | 07/20/2005 | USD | Booked | 50.8 | DAVES | FinalTest1 | High |
| | 1-119501 | 07/17/2004 | 07/14/2006 | USD | Open | 0 | DAVES | DELL111 | Medium |
| | 1-119301 | 07/17/2004 | 07/31/2004 | USD | Open | 0 | DAVES | | Medium |
| | 1-113201 | 07/16/2004 | 07/31/2004 | USD | Open | 12825 | DAVES | Oracle | Medium |
| ◀ 1 - 5 of 19 ▶ | | | | | | | | | |

| Shipping Status | | | | | | | | | |
|---|--------|------------|--------------------|------------------|------------|----------------------|-----------|-------------|----------|
| Create New Line Item | | | | | | | | | |
| Details Of Sales Order Number: 1-120901 | | | | | | | | | |
| Action | Line # | Product | Quantity Requested | Quantity Shipped | Status | Actual Shipment Date | Net Price | Total Price | Discount |
| | 1 | Nokia 5190 | 2 | | In-transit | | 31.5 | 63 | 10 |

The above displayed screen displays Sales Order Shipping Status details pertaining to the selected Sales Order in the Sales Order Shipping Status portlet.

The above displayed screen can be divided into two parts:

The first part contains details like: Line #, Product, Quantity Requested, Quantity Shipped, Status, Actual Shipment Date, Net Price, Total Price, and Discount, which are self explanatory.

The second part can be categorized as the actions that can be performed from Sales Order Shipping Status Portlet. Action buttons available are: Edit, Maximize, and Minimize.

Click Edit icon (pencil icon) to update the Sales Order Shipping Status details.

Figure 9 WebLogic Portlets for Siebel Sales Order Shipping Status Portlet – SO details Screen

| Shipping Status | | Home |
|------------------------------|---|------|
| Update Sales Order Line Item | | |
| Order#: | <input type="text" value="1-120901"/> | |
| Line Number: | <input type="text" value="1"/> | |
| Product: | <input type="text" value="Nokia 5190"/> | |
| Quantity Requested: | <input type="text" value="2"/> | |
| Item Price: | <input type="text" value="31.5"/> | |
| Line Total Amount: | <input type="text" value="63"/> | |
| Status: | <input type="text" value="In-transit"/> | |
| Discount: | <input type="text" value="10"/> | |
| | <input type="button" value="Update"/> | |

Order

This field displays the Sales Order Number. This field is not updatable.

Line Number

This field displays the Line Number attached to the Sales Order. This field is not updatable.

Product

This field displays the product. This field is not updatable.

Quantity Requested

This field displays the Quantity Requested. This field is updatable.

Item Price

This field displays the Item Price. This field is not updatable.

Line Total Amount

This field displays the total line amount. This field is not updatable.

Status

This field displays the current status of the line item and allows the user to change the status. This field is updatable for employee.

Discount

This field displays the discount percentage. This field is not updatable.

Once the changes are updated, click Update.

Creating a new Line Item for the Sales Order Shipping Status

In order to create a new line item details for the Sales Order Shipping Status. Scroll to the Sales Order Portlet and then click Status hyperlink. A screen as illustrated in the following figure is displayed:

Figure 10 WebLogic Portlets for Siebel Sales Order Shipping Status Portlet Screen

| Sales Order | | | | | | | | | |
|------------------------|----------|------------|------------|----------|------------|--------|-----------|---------------|----------|
| Create New Sales Order | | | | | | | | | |
| Action | Order # | Order Date | Ship Date | Currency | Status | Amount | Sales Rep | Customer Name | Priority |
| | 1-120901 | 07/17/2004 | 10/30/2004 | USD | In-transit | 63 | DAVES | Oracle | Medium |
| | 1-119601 | 07/17/2004 | 07/20/2005 | USD | Booked | 50.8 | DAVES | FinalTest1 | High |
| | 1-119501 | 07/17/2004 | 07/14/2006 | USD | Open | 0 | DAVES | DELL111 | Medium |
| | 1-119301 | 07/17/2004 | 07/31/2004 | USD | Open | 0 | DAVES | | Medium |
| | 1-113201 | 07/16/2004 | 07/31/2004 | USD | Open | 12825 | DAVES | Oracle | Medium |
| ◀ 1 - 5 of 19 ▶ | | | | | | | | | |

| Shipping Status | | | | | | | | | |
|---|--------|------------|--------------------|------------------|------------|----------------------|-----------|-------------|----------|
| Create New Line Item | | | | | | | | | |
| Details Of Sales Order Number: 1-120901 | | | | | | | | | |
| Action | Line # | Product | Quantity Requested | Quantity Shipped | Status | Actual Shipment Date | Net Price | Total Price | Discount |
| | 1 | Nokia 5190 | 2 | | In-transit | | 31.5 | 63 | 10 |

Click Create New Line Item hyperlink from the Sales Order Shipping Status Portlet a screen as illustrated in the following figure is displayed:

Figure 11 WebLogic Portlets for Siebel – Sales Order Shipping Status Portlet – Create new Line Item Screen

| Shipping Status | |
|---------------------|---------------------------------------|
| Create Line Item | |
| Line Item: | <input type="text"/> |
| Quantity Requested: | <input type="text"/> |
| Line Item Discount: | <input type="text" value="5"/> |
| | <input type="button" value="Create"/> |

Line Item

Click Browse icon (magnify icon), which displays a screen as illustrated in the following figure.

Figure 12 WebLogic Portlets for Siebel – Sales Order Shipping Status Portlet – Create new Line Item Browse Screen

| Shipping Status | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|--|--|--|
| Home Back | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Manual Search - Enter Product Name or Expression, then click "Search": | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Show All Products : | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | <input type="button" value="Search"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Quick Search - Find all Products starts with: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table> <tr> <td>A</td><td>B</td><td>C</td><td>D</td><td>E</td><td>F</td><td>G</td><td>H</td><td>I</td><td>J</td><td>K</td><td>L</td><td>M</td> </tr> <tr> <td>N</td><td>O</td><td>P</td><td>Q</td><td>R</td><td>S</td><td>T</td><td>U</td><td>V</td><td>W</td><td>X</td><td>Y</td><td>Z</td> </tr> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>0</td><td></td><td></td><td></td> </tr> </table> | | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 0 | | | |
| A | B | C | D | E | F | G | H | I | J | K | L | M | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| N | O | P | Q | R | S | T | U | V | W | X | Y | Z | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Product Name*: | <input type="text" value="Nokia 5190"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | <input type="button" value="Submit"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

1. Use any one of the following in the search criteria:
 - a. Enter the Product and click search.
 - b. Click on Products link.
 - c. Click on an alphabet with which the Product name starts.
2. The list of Products matching the search criteria are populated in the Product Name drop down box.

Click on Back hyperlink and the control is returned back to WebLogic Portlets for Siebel – Sales Order Shipping Status Portlet – Create new Line Item Screen.

Click on Home hyperlink to quit from the Sales Order Shipping Status Portlet – Create new Line Item Browse screen and return back to Sales Order portlet.

After entering the details, click Submit.

The following are the remaining fields of WebLogic Portlets for Siebel – Sales Order Shipping Status Portlet – Create new Line Item Screen:

Quantity Required

Enter the required ordered quantity.

Line Item Discount

This field is to specify the discount for the line item.

After entering the details, click Create.

Creating a new Sales Order

In order to create a new Sales Order scroll to the Sales Order Portlet a screen as illustrated in the following figure is displayed:

Figure 13 WebLogic Portlets for Siebel – Sales Order Portlet Screen

| Sales Order | | | | | | | | | |
|------------------------|----------|------------|------------|----------|------------|--------|-----------|------------------|----------|
| Create New Sales Order | | | | | | | | Edit Preferences | |
| Action | Order # | Order Date | Ship Date | Currency | Status | Amount | Sales Rep | Customer Name | Priority |
| | 1-120901 | 07/17/2004 | 10/30/2004 | USD | In-transit | 63 | DAVES | Oracle | Medium |
| | 1-119601 | 07/17/2004 | 07/20/2005 | USD | Booked | 50.8 | DAVES | FinalTest1 | High |
| | 1-119501 | 07/17/2004 | 07/14/2006 | USD | Open | 0 | DAVES | DELL111 | Medium |
| | 1-119301 | 07/17/2004 | 07/31/2004 | USD | Open | 0 | DAVES | | Medium |
| | 1-113201 | 07/16/2004 | 07/31/2004 | USD | Open | 12825 | DAVES | Oracle | Medium |
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| Shipping Status | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| Please Click On the Status of 'Sales Order' Portlet to Begin | | | | | | | | | |

Click Create New Sales Order hyperlink from the Sales Order Portlet a screen as illustrated in the following figure is displayed:

Figure 14 WebLogic Portlets for Siebel – Sales Order Portlet – Creation of new Sales Order Screen

| Sales Order | | Home |
|-------------------------|--|------|
| Create Sales Order | | |
| Customer Id: | <input type="text"/> | |
| Order Type: | <input type="text" value="Sales Order"/> | |
| Order Status: | <input type="text" value="Open"/> | |
| Product: | <input type="text"/> | |
| Quantity Requested: | <input type="text"/> | |
| Product Discount: | <input type="text"/> % | |
| Priority: | <input type="text"/> | |
| Promised Delivery Date: | <input type="text"/> | |
| | <input type="button" value="Create"/> | |

Customer Id

This field is to select the Customer ID (Account ID). Click Browse icon (magnify icon), which displays a screen as illustrated in the following figure. This field is shown only for Employee.

Figure 15 WebLogic Portlets for Siebel – Sales Order Portlet – Creation of new Sales Order Customer ID (Account ID) search screen

The screenshot shows a web application window titled "Sales Order". In the top right corner, there are links for "Home" and "Back". The main content area is divided into two sections. The "Manual Search" section on the left has a label "Manual Search - Enter Account Name or Expression, then click 'Search':" and a text input field labeled "Show All Account Id : *". Below the input field is a "Search" button. The "Quick Search" section on the right has a label "Quick Search - Find all Customer Ids starts with:" and a grid of letters and numbers. The grid is organized as follows:

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| A | B | C | D | E | F | G | H | I | J | K | L | M |
| N | O | P | Q | R | S | T | U | V | W | X | Y | Z |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 0 | | | |

Below the grid, there is a label "Accounts*:" followed by a dropdown menu. At the bottom center of the search area is a "Submit" button.

1. Use any one of the following in the search criteria:
 - a. Enter the Account and click search.
 - b. Click on Accounts link.
 - c. Click on an alphabet with which the account name starts.
2. The list of Accounts matching the search criteria are populated in the Accounts drop down box.

Click on Back hyperlink and the control is returned back to WebLogic Portlets for Siebel – Sales Order Portlet – Creation of new Sales Order Screen.

Click on Home hyperlink to quit from the S WebLogic Portlets for Siebel – Sales Order Portlet – Creation of new Sales Order screen and return back to Sales Order portlet.

After entering the details, click Submit.

The following are the remaining fields of WebLogic Portlets for Siebel – Sales Order Portlet – Creation of new Sales Order Screen:

Order Type

This field specifies the Order Type. Default value is Sales Order.

Order Status

This field specifies the status of the order. Default value is Open.

Product

This field is to select the product. Click Browse icon (magnify icon), which displays a screen as illustrated in the following figure.

Figure 16 WebLogic Portlets for Siebel – Sales Order Portlet – Creation of new Sales Order Product search screen

The screenshot shows a web application window titled "Sales Order". In the top right corner, there are links for "Home" and "Back". The main content area is divided into two search sections. The "Manual Search" section on the left prompts the user to "Enter Product Name or Expression, then click 'Search':" and includes a text input field labeled "Show All Products : *" and a "Search" button. The "Quick Search" section on the right prompts the user to "Find all Products starts with:" and features a grid of letters (A-M) and numbers (1-0). Below this grid is a "Products" label and a "Product Name*" dropdown menu, with a "Submit" button at the bottom right.

1. Use any one of the following in the search criteria:
 - a. Enter the Product and click search.
 - b. Click on Products link.
 - c. Click on an alphabet with which the Product name starts.
2. The list of Products matching the search criteria are populated in the Product Name drop down box.

Click on Back hyperlink and the control is returned back to WebLogic Portlets for Siebel – Sales Order Portlet – Creation of new Sales Order Screen.

Click on Home hyperlink to quit from the WebLogic Portlets for Siebel – Sales Order Portlet – Creation of new Sales Order screen and return back to Sales Order portlet.

After entering the details, click Submit.

The following are the remaining fields of WebLogic Portlets for Siebel – Sales Order Portlet – Creation of new Sales Order Screen:

Quantity Requested

Enter requested quantity.

Product Discount

This field allows the user to select the discount for a product. This is provided only for Employee users.

Priority

This field allows the user to select the priority.

Promised Delivery Date

In this field is enter the promised delivery date. Click on Calendar icon, which displays a pop screen to pick up the required date.

After entering the details, click Create.

Editing a Sales Order

In order to update an existing Sales Order scroll to the Sales Order Portlet a screen as illustrated in the following figure is displayed:

Figure 17 WebLogic Portlets for Siebel – Sales Order Portlet Screen

Sales Order

Create New Sales Order

Edit Preferences

| Action | Order # | Order Date | Ship Date | Currency | Status | Amount | Sales Rep | Customer Name | Priority |
|--------|----------|------------|------------|----------|------------|--------|-----------|---------------|----------|
| | 1-120901 | 07/17/2004 | 10/30/2004 | USD | In-transit | 63 | DAVES | Oracle | Medium |
| | 1-119601 | 07/17/2004 | 07/20/2005 | USD | Booked | 50.8 | DAVES | FinalTest1 | High |
| | 1-119501 | 07/17/2004 | 07/14/2006 | USD | Open | 0 | DAVES | DELL111 | Medium |
| | 1-119301 | 07/17/2004 | 07/31/2004 | USD | Open | 0 | DAVES | | Medium |
| | 1-113201 | 07/16/2004 | 07/31/2004 | USD | Open | 12825 | DAVES | Oracle | Medium |

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Shipping Status

Please Click On the Status of 'Sales Order' Portlet to Begin

Click Edit icon (pencil icon) to update the Sales Order from the Sales Order Portlet a screen as illustrated in the following figure is displayed:

Figure 18 WebLogic Portlets for Siebel – Sales Order Portlet – Edit Sales Order Screen

Sales Order

Update Sales Order

Home

Order#:

1-128301

Order Date:

07/19/2004

Currency:

USD

Order Type:

Sales Order

Amount:

0

Status:

Open

Priority:

Medium

Update

Order

Specifies sales order number.

Order Date

Specifies ordered date.

Currency

Specifies the currency type.

Order Type

Specifies the nature of the order.

Amount

Specifies the order amount.

Status

This field displays the current status and allows the user to update the status as required. This field is updatable.

Priority

This field displays the priority set and allows the user to modify the priority as required. This field is updatable.

After entering the details, click Update.

Preferences for the Sales Order

Click on Edit preferences hyperlink from the Sales Order Portlet. A screen as illustrated in the following figure is displayed:

Figure 19 WebLogic Portlets for Siebel – Sales Order Portlet – Edit Preferences Screen

The screenshot shows a web browser window titled "Sales Order" with a sub-header "Sales Order Preferences". The form includes the following elements:

- Max Rows:** A dropdown menu currently showing "5".
- Order Number:** A text input field.
- Customer Id:** A text input field with a magnifying glass icon to its right.
- Order Status:** A dropdown menu currently showing "***ALL***".
- From Date:** A date selection field with a calendar icon.
- To Date:** A date selection field with a calendar icon.
- SavePreferences:** A button at the bottom center of the form.

Maxrows

Depending on the value selected in the Maxrows field, the Sales Order portlet will only display the first few records (as specified for maxrows) and the user can then navigate for rest of the records using Previous and Next buttons, which are available at the bottom left of the Sales Order portlet.

Order Number

Enter the order number.

Customer Id

Select customer. Click Browse icon (magnify icon), which allows the user to search and select the required customer for the selection list based on the selection criteria. This field is shown only for Employee.

Order Status

Depending on the requirement, select the order status.

From Date and To Date entry is not mandatory; this will reduce the number of rows to be retrieved.

Action button available are: Maximize, Minimize, and Home.

Click on Home hyperlink to quit from the edit preferences screen.

After entering the details, click on SavePreferences.

Service Request Portlet

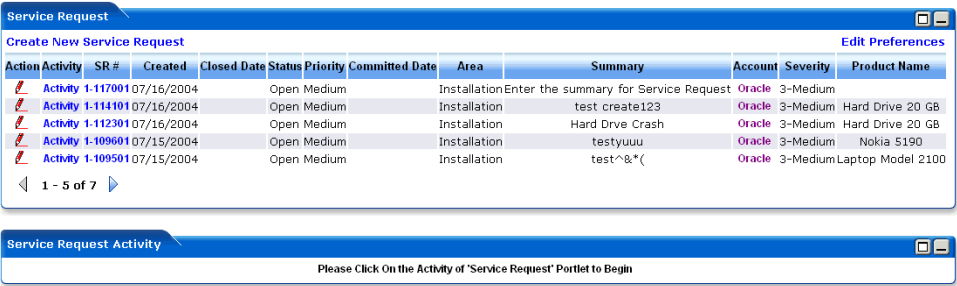
The following operations that can be performed from the Service Request:

- To View an existing Service Request
- To Create an new Service Request
- To Edit / Update an existing Service Request

Viewing an existing Service Request

In order to view details for an existing Service Request scroll to the Service Request a screen as illustrated in the following figure is displayed:

Figure 20 WebLogic Portlets for Siebel – Service Request Portlet Screen



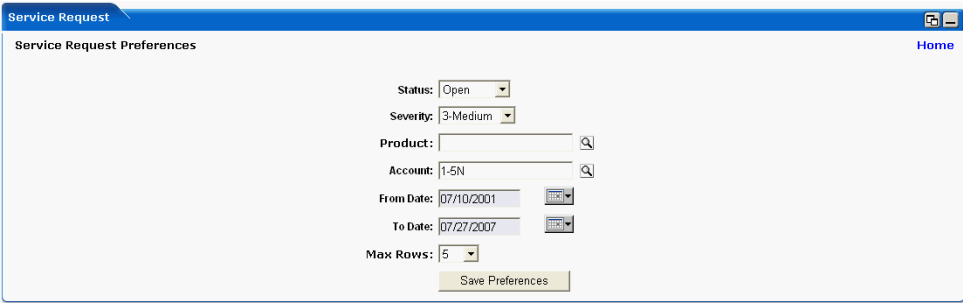
The above displayed screen can be divided into two parts:

The first part contains details like: Activity, SR#, Created, Closed Date, Status, Priority, Committed Date, Area, Summary, Account, Severity, and Product Name, which are self explanatory from the above displayed screen.

The second part can be categorized as the actions that can be performed for Service Request. Action buttons available are: Create New Service Request, Edit, Maximize, Minimize, and Edit Preferences for Service Request.

Click on Edit Preferences hyperlink. A screen as illustrated in the following figure is displayed:

Figure 21 WebLogic Portlets for Siebel – Service Request Edit Preferences Portlet Screen



Status

Select the status from the list of options.

Severity

Select the severity (criticality) from the list of options.

Product

Select the product. Click Browse icon (magnify icon), which is display a screen as illustrated in the following figure.

Figure 22 WebLogic Portlets for Siebel – Service Request Edit Preferences Product search Screen

The screenshot shows a web application interface for searching products. It features a blue header bar with the title 'Service Request' and navigation links 'Home' and 'Back'. The main content area is divided into two search sections. The 'Manual Search' section includes a text input field for 'Show All Products :', a 'Search' button, and a label 'Manual Search - Enter Product Name or Expression, then click "Search":'. The 'Quick Search' section includes a label 'Quick Search - Find all Customer Ids starts with:', a 'Products' link, and a grid of alphabet buttons (A-Z). Below these sections is a 'Product Name*' dropdown menu and a 'Submit' button.

1. Use any one of the following in the search criteria:
 - a. Enter the Product and click search.
 - b. Click on Products link.
 - c. Click on an alphabet with which the Product name starts.
2. The list of Products matching the search criteria are populated in the Product Name drop down box.

Click on Back hyperlink and the control is returned back to Portlets for Siebel – Service Request Edit Preferences Portlet Screen.

Click on Home hyperlink to quit from the WebLogic Portlets for Siebel – Service Request Edit Preferences Product search Screen and return back to Sales Order portlet.

After entering the details, click Submit.

The following are the remaining fields of WebLogic Portlets for Siebel – Service Request Edit Preferences Portlet Screen:

Account

Select the account number. Click Browse icon (magnify icon), which is display a screen as illustrated in the following figure. This field is shown only for Employee.

Figure 23 WebLogic Portlets for Siebel – Service Request Edit Preferences Account search Screen

1. Use any one of the following in the search criteria:
 - a. Enter the Account and click search.
 - b. Click on Accounts link.
 - c. Click on an alphabet with which the Account starts.
2. The list of Accounts matching the search criteria are populated in the Accounts drop down box.

Click on Back hyperlink and the control is returned back to Portlets for Siebel – Service Request Edit Preferences Portlet Screen.

Click on Home hyperlink to quit from the WebLogic Portlets for Siebel – Service Request Edit Preferences Product search Screen and return back to Sales Order portlet.

After entering the details, click Submit.

The following are the remaining fields of WebLogic Portlets for Siebel – Service Request Edit Preferences Portlet Screen:

Maxrows

Depending on the value selected in the Maxrows field, the Service Request will only display the first few records (as specified for maxrows) and the user can then navigate for rest of the records using Previous and Next buttons, which are available at the bottom left of the Service Request.

From Date and To Date entry is not mandatory; this will reduce the number of rows to be retrieved.

Action button available are: Maximize, Minimize, and Home.

Click on Home hyperlink to quit from the edit preferences screen.

After entering the details, click on SavePreferences.

Click the SR# hyperlink from WebLogic Portlets for Siebel – Service Request Portlet Screen to view details for the required Service Request. And the Siebel screen for the selected Service Request is displayed.

Figure 24 WebLogic Portlets for Siebel – Service Request – Details Screen

The screenshot displays the Siebel Service Request Details screen. The top navigation bar includes Home, Opportunities, Accounts, Contacts, Activities, Calendar, Quotes, Forecasts, Revenues, Compensation, Employees, Products, and Info Center. Below this is a 'Show:' dropdown set to 'All Service Requests' and a 'History:' button. The main content area is titled 'Service Requests' and shows a table with one record: SR # 1-130701, Status Open, Summary Enter the summary for Service Request, Account Oracle, Site San Francisco, Last Name Aceman, Work Phone # (817) 218-3196, and Owner SADMIN. Below the table is a detailed form for the selected SR. The form is divided into several sections: SR # (1-130701), Account (Oracle), Site (San Francisco), Summary (Enter the summary for Service Request), Last Name (Aceman), First Name (Mark), Status (Open), Substatus (Unassigned), Work Phone # ((817) 218-3196), Area (Installation), Subarea, Priority (Medium), Severity (3-Medium), Owner (SADMIN), Agent Opened (7/20/2004 4:56:15 AM), Agent Committed, Agent Closed, Customer Opened, and Customer Committed.

The fields displayed are self-explanatory. After viewing the details click close to quit from the Siebel screen.

Click the Account hyperlink from WebLogic Portlets for Siebel – Service Request Portlet Screen to view details for the required Account. And the Siebel screen for the selected Account is displayed.

Figure 25 WebLogic Portlets for Siebel – Service Request – Account Details Screen

The screenshot shows the Siebel Sales application in a Microsoft Internet Explorer browser. The top navigation bar contains various tabs: Home, Opportunities, Accounts, Contacts, Activities, Calendar, Quotes, Forecasts, Revenues, Compensation, Employees, Products, Info Center, Training, and Brief. Below the navigation bar, there's a 'Show:' dropdown set to 'All Accounts' and a 'History' button. The main content area is titled 'Accounts' and displays a table with one account. The table has columns: New, Name, Site, Main Phone #, Territories, Industries, Status, and URL. The account listed is Oracle, San Francisco, (412) 230-9089, Active, with the URL www.oracle.com. Below the table, there's a form with various fields for account details, including Name, Site, Main Phone #, Main Fax #, Current Volume, Potential Volume, Account Team, Parent, Account Type, Status, Stage, Expertise, Partner, Competitor, Reference, and PO Approved.

The fields displayed are self-explanatory. After viewing the details click close to quit from the Siebel screen.

Editing an existing Service Request

In order to edit/update details for an existing Service Request scroll to the Service Request a screen as illustrated in the following figure is displayed:

Figure 26 WebLogic Portlets for Siebel – Service Request Portlet Screen

The screenshot shows the Service Request portlet screen. It features a table with the following columns: Action, Activity, SR #, Created, Closed Date, Status, Priority, Committed Date, Area, Summary, Account, Severity, and Product Name. The table contains five rows of service requests. Below the table, there's a 'Service Request Activity' section with a message: 'Please Click On The Activity of 'Service Request' Portlet to Begin'.

| Action | Activity | SR # | Created | Closed Date | Status | Priority | Committed Date | Area | Summary | Account | Severity | Product Name |
|--------|-------------------|------------|---------|-------------|--------|----------|----------------|--------------|---------------------------------------|---------|----------|-------------------|
| | Activity 1-117001 | 07/16/2004 | | | Open | Medium | | Installation | Enter the summary for Service Request | Oracle | 3-Medium | |
| | Activity 1-114101 | 07/16/2004 | | | Open | Medium | | Installation | test create123 | Oracle | 3-Medium | Hard Drive 20 GB |
| | Activity 1-112301 | 07/16/2004 | | | Open | Medium | | Installation | Hard Drive Crash | Oracle | 3-Medium | Hard Drive 20 GB |
| | Activity 1-109601 | 07/15/2004 | | | Open | Medium | | Installation | testyuuu | Oracle | 3-Medium | Nokia 5190 |
| | Activity 1-109501 | 07/15/2004 | | | Open | Medium | | Installation | test^&*(| Oracle | 3-Medium | Laptop Model 2100 |

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Service Request Activity

Please Click On The Activity of 'Service Request' Portlet to Begin

The above displayed screen can be divided into two parts:

The first part contains details like: Activity, SR#, Created, Closed Date, Status, Priority, Committed Date, Area, Summary, Account, Severity, and Product Name, which are self explanatory from the above displayed screen.

The second part can be categorized as the actions that can be performed for Service Request. Action buttons available are: Create New Service Request, Edit, Maximize, Minimize, and Edit Preferences for Service Request.

Click Edit icon (pencil icon) to update Service Request details. A screen as illustrated below is displayed:

Figure 27 WebLogic Portlets for Siebel – Service Request –Edit Screen

The screenshot shows a web application window titled 'Service Request' with a sub-header 'Update Service Request'. The form contains the following fields and controls:

- SR#:** A text input field containing the value '1-117001'.
- Abstract:** A text input field with the placeholder text 'Enter the summary for Se'.
- Area:** A text input field containing the value 'Installation'.
- Commit Time:** A text input field.
- Status:** A dropdown menu with 'Open' selected.
- Severity:** A dropdown menu with '3-Medium' selected.
- Priority:** A dropdown menu with 'Medium' selected.
- Submit:** A blue button located below the Priority dropdown.

A 'Home' link is visible in the top right corner of the form area.

SR#

This field displays the Service Request number. This field is not updatable.

Abstract

This field displays the abstract (narration) for the Service Request. This field is not updatable.

Area

This field displays the area or location. This field is not updatable.

Commit Time

This field displays the time, which was committed. This field is not updatable.

Status

This field displays the current status and allows the user to select and update the status. This field is updatable.

Severity

This field displays the assigned severity and allows the user to select and update the severity. This field is updatable.

Priority

This field displays the priority assigned and allows the user to select and update the priority. This field is updatable.

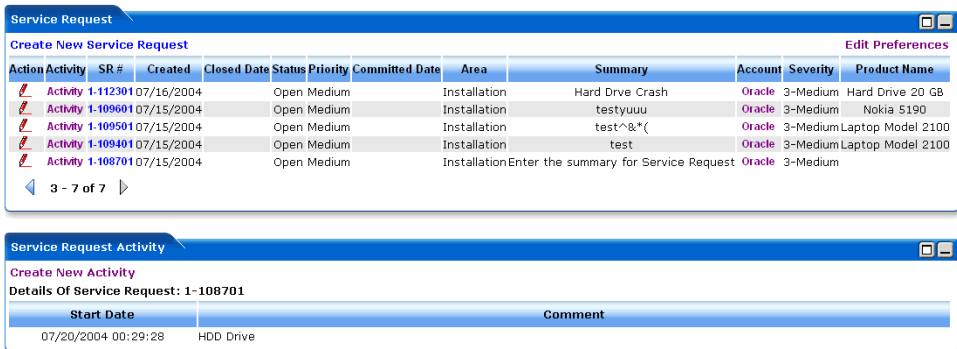
Once the changes are updated, click Submit.

Creating a new Activity for the Service Request Activity

In order to create a new Service Request Activity scroll to the Service Request portlet.

Click on Activity hyperlink from the Service Request portlet. A screen as illustrated below is displayed:

Figure 28 WebLogic Portlets for Siebel – Service Request Activity portlet Screen



Click Create New Activity hyperlink from the Service Request Activity portlet a screen as illustrated in the following figure is displayed:

Figure 29 WebLogic Portlets for Siebel – Service Request Activity – Create Activity

The screenshot shows a web application window titled "Service Request Activity". Inside the window, there is a sub-header "Create Activity" and a "Home" link in the top right corner. The main content area contains the following fields:

- SR Number :** 1-108701
- Status :** In Progress
- Activity Type:** Best Actions (with a dropdown arrow)
- Comment:** A large text area with a vertical scrollbar.

At the bottom of the form is a "Create" button.

SR Number

Displays the auto generated Service Request number.

Status

This field allows the user to enter the status. Default value is In Progress.

Activity Type

This field allows the user to select activity type from the drop down list. Click on the drop down list and a list of valid Activity Types are displayed. Select the appropriate Activity Type.

Comment

This field allows the user to enter any additional information or narration and so on.

Click on Home hyperlink to quit from the existing screen and return back to Sales Order portlet.

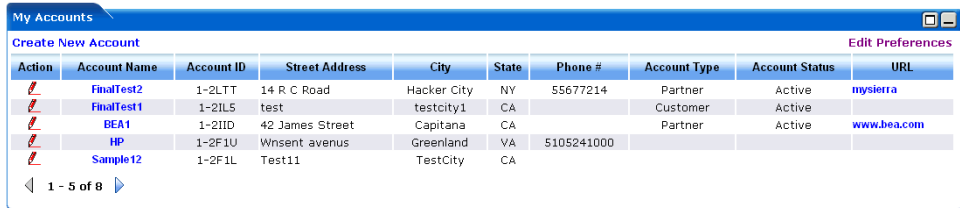
After entering the details, click Create.

My Accounts Portlet

The following operations that can be performed from My Accounts Portlet:

- To View an existing Account
- To Create new account
- To Edit / Update an existing Account

In order to view details for accounts scroll to the My Accounts portlet. And a screen as illustrated in the following figure is displayed:

Figure 30 WebLogic Portlets for Siebel – My Accounts Portlet Screen


The screenshot shows a web application window titled "My Accounts". It has a "Create New Account" button on the left and an "Edit Preferences" link on the right. Below these is a table with columns: Action, Account Name, Account ID, Street Address, City, State, Phone #, Account Type, Account Status, and URL. There are five rows of account data. At the bottom left, it says "1 - 5 of 8".

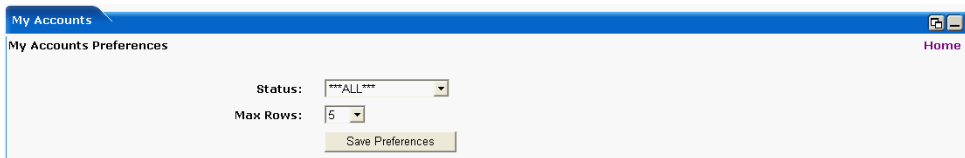
| Action | Account Name | Account ID | Street Address | City | State | Phone # | Account Type | Account Status | URL |
|--------|--------------|------------|-----------------|-------------|-------|------------|--------------|----------------|-----------------------------|
| | FinalTest2 | 1-2LTT | 14 R C Road | Hacker City | NY | 55677214 | Partner | Active | mysierra |
| | FinalTest1 | 1-2IL5 | test | testcity1 | CA | | Customer | Active | |
| | BEA1 | 1-2IID | 42 James Street | Capitana | CA | | Partner | Active | www.bea.com |
| | HP | 1-2FIU | Wnsent avenue | Greenland | VA | 5105241000 | | | |
| | Sample12 | 1-2F1L | Test11 | TestCity | CA | | | | |

The above displayed screen can be divided into two parts:

The first part contains details like: Account Name, Account ID, Street Address, City, State, Phone #, Account Type, Account Status, and URL, which are self explanatory from the above displayed screen.

The second part can be categorized as the actions that can be performed for My Accounts portlet. Action buttons available are: Maximize, Minimize, and Edit preferences for My Accounts portlet.

Click on Edit Preferences hyperlink. A screen as illustrated in the following figure is displayed:

Figure 31 WebLogic Portlets for Siebel – My Accounts Portlet Screen Edit preferences Screen


The screenshot shows a web application window titled "My Accounts" with a sub-header "My Accounts Preferences". It contains two dropdown menus: "Status:" with the value "***ALL***" and "Max Rows:" with the value "5". Below these is a "Save Preferences" button. A "Home" link is visible in the top right corner.

Status

This field allows the user to select the status from the selection list.

Maxrows

Depending on the value selected in the Maxrows field, the My Accounts portlet will only display the first few records and the user can then navigate for rest of the records using Previous and Next buttons, which are available at the bottom left of the My Accounts portlet.

Action buttons available are: Maximize and Minimize, and Home.

Click on Home hyperlink to quit from the edit preferences screen and return back to My Accounts portlet.

After entering the details, click on SavePreferences.

Viewing an existing Account

In order to view details for an Account scroll to the My Accounts portlet. And a screen as illustrated in the following figure is displayed:

Figure 32 WebLogic Portlets for Siebel – My Accounts Portlet Screen

| Action | Account Name | Account ID | Street Address | City | State | Phone # | Account Type | Account Status | URL |
|--------|--------------|------------|-----------------|-------------|-------|------------|--------------|----------------|-------------|
| | FinalTest2 | 1-2LTT | 14 R C Road | Hacker City | NY | 55677214 | Partner | Active | mysierra |
| | FinalTest1 | 1-2IL5 | test | testcity1 | CA | | Customer | Active | |
| | BEA1 | 1-2IID | 42 James Street | Capitana | CA | | Partner | Active | www.bea.com |
| | HP | 1-2FIU | Wnsent avenus | Greenland | VA | 5105241000 | | | |
| | Sample12 | 1-2F1L | Test11 | TestCity | CA | | | | |

Click the Account Name hyperlink to view details for the required account. And the Siebel screen for the selected account is displayed.

Figure 33 WebLogic Portlets for Siebel – My Accounts – Account Siebel screen

| Name | Site | Main Phone # | Territories | Industries | Status | URL |
|--------|---------------|----------------|-------------|------------|--------|----------------|
| Oracle | San Francisco | (412) 230-9089 | | | Active | www.oracle.com |

The fields displayed are self-explanatory. After viewing the details click Close to quit from the Siebel screen.

Creating a new Account

In order to create a new account scroll to the My Accounts Portlet a screen as illustrated in the following figure is displayed:

Figure 34 WebLogic Portlets for Siebel – My Accounts Portlet Screen

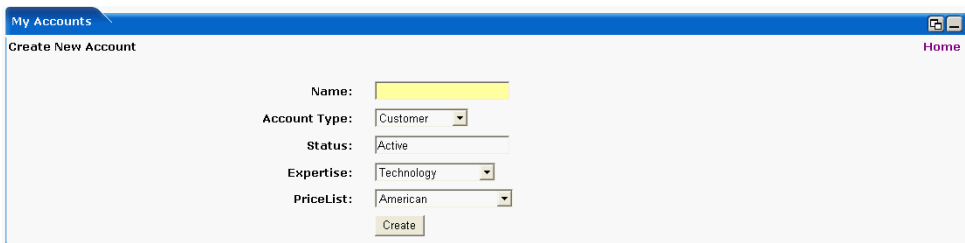


The screenshot shows the 'My Accounts' portlet interface. At the top, there is a 'Create New Account' link. Below it is a table with the following columns: Action, Account Name, Account ID, Street Address, City, State, Phone #, Account Type, Account Status, and URL. The table contains five rows of account data. At the bottom left, there is a pagination control showing '1 - 5 of 8'.

| Action | Account Name | Account ID | Street Address | City | State | Phone # | Account Type | Account Status | URL |
|--------|--------------|------------|-----------------|-------------|-------|------------|--------------|----------------|-----------------------------|
| | FinalTest2 | 1-2LTT | 14 R C Road | Hacker City | NY | 55677214 | Partner | Active | mysierra |
| | FinalTest1 | 1-2IL5 | test | testcity1 | CA | | Customer | Active | |
| | BEA1 | 1-2IID | 42 James Street | Capitana | CA | | Partner | Active | www.bea.com |
| | HP | 1-2F1U | Wnsent avenus | Greenland | VA | 5105241000 | | | |
| | Sample12 | 1-2F1L | Test11 | TestCity | CA | | | | |

Click Create New Account hyperlink from the My Accounts Portlet a screen as illustrated in the following figure is displayed:

Figure 35 WebLogic Portlets for Siebel – My Accounts – Creation of new Account



The screenshot shows the 'Create New Account' form. It includes fields for Name, Account Type (dropdown), Status (dropdown), Expertise (dropdown), and PriceList (dropdown). There is a 'Create' button at the bottom.

Name

Enter the account name.

Account Type

Select the Account Type from the selection list.

Status

Select the status from the selection list.

Expertise

Select the expertise from the selection list.

PriceList

Select the price list from the selection list.

Action buttons available are: Maximize and Minimize, and Home.

Click on Home hyperlink to quit from the existing screen and return back to My Accounts portlet.

After entering the details, click Create.

Editing Account details

In order to update an existing account scroll to the My Accounts Portlet a screen as illustrated in the following figure is displayed:

Figure 36 WebLogic Portlets for Siebel – My Accounts Portlet Screen

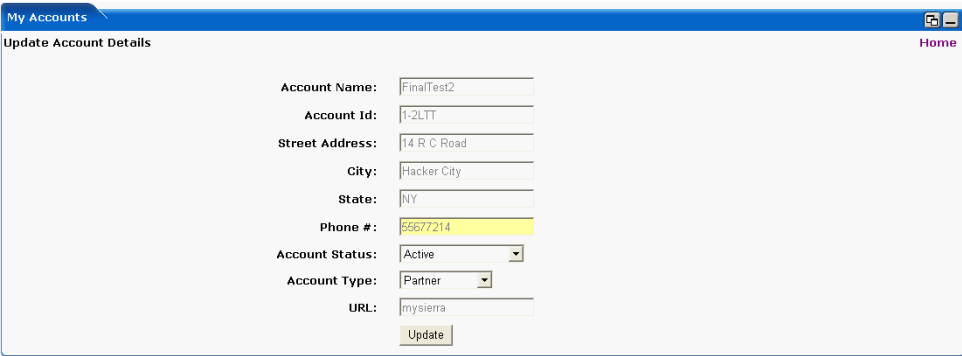


| My Accounts | | | | | | | | | |
|--------------------|--------------|------------|-----------------|-------------|-------|------------|--------------|----------------|-----------------------------|
| Create New Account | | | | | | | | | Edit Preferences |
| Action | Account Name | Account ID | Street Address | City | State | Phone # | Account Type | Account Status | URL |
| | FinalTest2 | 1-2LTT | 14 R C Road | Hacker City | NY | 55677214 | Partner | Active | mysierra |
| | FinalTest1 | 1-2IL5 | test | testcity1 | CA | | Customer | Active | |
| | BEA1 | 1-2IID | 42 James Street | Capitana | CA | | Partner | Active | www.bea.com |
| | HP | 1-2FIU | Wnsent avenus | Greenland | VA | 5105241000 | | | |
| | Sample12 | 1-2FIL | Test11 | TestCity | CA | | | | |

1 - 5 of 8

Click Edit icon (pencil icon) to update the account details from the My Accounts Portlet a screen as illustrated in the following figure is displayed:

Figure 37 WebLogic Portlets for Siebel – My Accounts Portlet – edit account Screen



My Accounts

Update Account Details

Home

Account Name: FinalTest2

Account Id: 1-2LTT

Street Address: 14 R C Road

City: Hacker City

State: NY

Phone #: 55677214

Account Status: Active

Account Type: Partner

URL: mysierra

Update

Account Name

This field displays the account name.

Account ID

This field displays the account id attached to the account name.

Street Address

This field displays the address details of the account holder.

City

This field displays the city that the account holder belongs to.

State

This field displays the state that the account holder belongs to.

Phone #

This field displays the personal contact number of the account holder.

Account Status

This field displays the current account status. The user can update by selecting a valid option from the selection list. This field is updatable.

Account Type

This field displays the current account type. The user can update by selecting a valid option from the selection list. This field is updatable.

URL

This field displays the personal Web site address or URL of the account holder.

Action buttons available are: Maximize and Minimize, and Home.

Click on Home hyperlink to quit from the existing screen and return back to My Accounts portlet.

After entering the details, click on Update.

My Team Accounts Portlet

The following operations that can be performed from the My Team Accounts Portlet:

- To View Team Accounts details

In order to view details for Team Accounts scroll to the My Team Accounts portlet. And a screen as illustrated in the following figure is displayed:

Figure 38 WebLogic Portlets for Siebel – My Team Accounts Portlet Screen

| Account Name | Site | Main Phone # | Main Fax # | Account Type | Account Status | Team Member |
|--------------|------|--------------|------------|--------------|----------------|-------------|
| Sample12 | | | | | | DAVES |
| LUKES222 | | 7896754321 | | | Active | LUKES |
| LUKES111 | | 4536789090 | | | Active | LUKES |
| JOHNS111 | | 7869099090 | | | Active | JOHNS |
| HP | | 5105241000 | | | | DAVES |

The above displayed screen can be divided into two parts:

The first part contains details like: Account Name, Site, Main Phone#, Main Fax#, Account Type, Account Status, and Team Member, which are self explanatory from the above displayed screen.

The second part can be categorized as the actions that can be performed for My Team Accounts portlet. Action buttons available are: Maximize, Minimize, and Edit preferences for My Team Accounts portlet.

Click on Edit Preferences hyperlink. A screen as illustrated in the following figure is displayed:

Figure 39 WebLogic Portlets for Siebel – My Team Accounts Portlet Screen Edit preferences Screen

My Team Accounts Preferences

Status:

Sales Rep:

Account Type:

Max Rows:

[Home](#)

Status

Enter the account status. The user can select a valid status from the selection list.

Sales Rep

Enter the sales representative responsible. The user can select to view all sales orders responsible by his team (all team members reporting to him and himself) or by each team member reporting to him.

Account Type

Enter account type. The user can select a valid account type from the selection list.

Maxrows

Depending on the value selected in the Maxrows field, the My Team Accounts portlet will only display the first few records and the user can then navigate for rest of the records using Previous and Next buttons, which are available at the bottom left of the My Team Account portlet.

Action buttons available are: Maximize and Minimize, and Home.

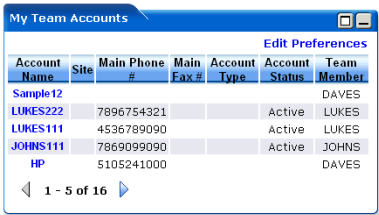
Click on Home hyperlink to quit from the edit preferences screen.

After entering the details, click on SavePreferences.

Viewing an existing Account

In order to view details for an Account scroll to the My Team Accounts portlet. And a screen as illustrated in the following figure is displayed:

Figure 40 WebLogic Portlets for Siebel – My Team Accounts Portlet Screen

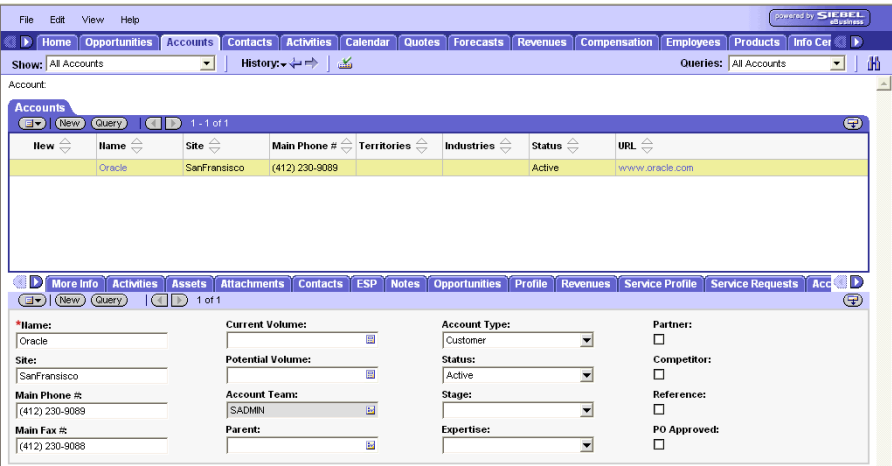


The screenshot shows a web application window titled "My Team Accounts". It features a table with columns: Account Name, Site, Main Phone #, Main Fax #, Account Type, Account Status, and Team Member. The table contains four rows of data. The first row is a header with a blue background. The second row is a sample record. The third and fourth rows are actual records. At the bottom of the table, there are navigation arrows and a page indicator "1 - 5 of 16".

| Account Name | Site | Main Phone # | Main Fax # | Account Type | Account Status | Team Member |
|--------------|------|--------------|------------|--------------|----------------|-------------|
| Sample12 | | | | | | DAVES |
| LUKES222 | | 7896754321 | | | Active | LUKES |
| LUKES111 | | 4536789090 | | | Active | LUKES |
| JOHNS111 | | 7869099090 | | | Active | JOHNS |
| HP | | 5105241000 | | | | DAVES |

Click the Account Name hyperlink to view details for the required account. And the Siebel screen for the selected account is displayed.

Figure 41 WebLogic Portlets for Siebel – My Team Accounts – Account Siebel screen



The fields displayed are self-explanatory. After viewing the details click Close to quit from the Siebel screen.

Agreements By Expiry Date Portlet

The following operations that can be performed from the Agreements By Expiry Date Portlet:

- To View Agreement details

In order to view details for agreements by expiry date scroll to the Agreements By Expiry Date portlet. And a screen as illustrated in the following figure is displayed:

Figure 42 WebLogic Portlets for Siebel – Agreements By Expiry Date Portlet Screen

The screenshot shows the 'Agreements By Expiry Date' portlet. It features a table with columns: Agreement #, Name, Account, Effective Date, Start Date, End Date, Type, and Status. There are five rows of data, all representing 'Service Level Agreement' types with a 'Current' status. The table is paginated, showing '1 - 5 of 5' records. An 'Edit Preferences' link is visible in the top right corner of the portlet.

| Agreement # | Name | Account | Effective Date | Start Date | End Date | Type | Status |
|-------------|--------|---------|----------------|------------|---------------------|-------------------------|---------|
| 1-99614 | 1-24V2 | 3com | 02/08/2004 | 02/08/2004 | 11/11/2004 16:45:12 | Service Level Agreement | Current |
| 1-99621 | 1-24V9 | Oracle | 02/08/2004 | 02/08/2004 | 10/21/2004 16:45:03 | Service Level Agreement | Current |
| 1-108205 | 1-2BHP | Oracle | 07/15/2004 | 07/15/2004 | 11/10/2004 16:55:12 | Service Level Agreement | Current |
| 1-108258 | 1-2BJ6 | | 07/15/2004 | 07/15/2004 | 07/23/2004 17:00:07 | Service Level Agreement | Current |
| 1-108265 | 1-2BJD | | 07/15/2004 | 07/15/2004 | | Service Level Agreement | Current |

The above displayed screen can be divided into two parts:

The first part contains details like: Agreement#, Name, Account, Effective Date, Start Date, End Date, Type, and Status, which are self explanatory from the above displayed screen.

The second part can be categorized as the actions that can be performed for Agreements By Expiry Date portlet. Action buttons available are: Maximize, Minimize, and Edit preferences for Agreements By Expiry Date portlet.

Click on Edit Preferences hyperlink. A screen as illustrated in the following figure is displayed:

Figure 43 WebLogic Portlets for Siebel – Agreement By Expiry Date Portlet Edit Preferences Screen

Maxrows

Depending on the value selected in the Maxrows field, the Agreements By Expiry Date portlet will only display the first few records and the user can then navigate for rest of the records using Previous and Next buttons, which are available at the bottom left of the Agreements By Expiry Date portlet.

Sort

Enter the sorting option.

FromDateExpiryDate

Enter start date or view agreements by expiry from, which date.

ToDateExpiryDate

Enter end date or view agreements by expiry until, which date.

Action buttons available are: Maximize, Minimize, and Home.

Click on Home hyperlink to quit from the edit preferences screen.

After entering the details, click on Submit.

Viewing an existing Agreement

In order to view details for an existing Agreement scroll to the Agreements By Expiry Date portlet. And a screen as illustrated in the following figure is displayed:

Figure 44 WebLogic Portlets for Siebel – Agreements By Expiry Date Portlet Screen

| Agreement # | Name | Account | Effective Date | Start Date | End Date | Type | Status |
|--------------------------|--------|---------|----------------|------------|---------------------|-------------------------|---------|
| 1-99614 | 1-24V2 | 3com | 02/08/2004 | 02/08/2004 | 11/11/2004 16:45:12 | Service Level Agreement | Current |
| 1-99621 | 1-24V9 | Oracle | 02/08/2004 | 02/08/2004 | 10/21/2004 16:45:03 | Service Level Agreement | Current |
| 1-108205 | 1-2BHP | Oracle | 07/15/2004 | 07/15/2004 | 11/10/2004 16:55:12 | Service Level Agreement | Current |
| 1-108258 | 1-2BJ6 | | 07/15/2004 | 07/15/2004 | 07/23/2004 17:00:07 | Service Level Agreement | Current |
| 1-108265 | 1-2BJD | | 07/15/2004 | 07/15/2004 | | Service Level Agreement | Current |

Click the Agreement# hyperlink to view Agreement details. And the Siebel screen as illustrated in the following screen is displayed.

Figure 45 WebLogic Portlets for Siebel – Agreements By Expiry Date Portlet Agreement Siebel Screen

The screenshot shows the Siebel 'Agreement Details' screen. At the top, there's a navigation bar with tabs like Home, Opportunities, Accounts, Contacts, Activities, Calendar, Quotes, Forecasts, Revenues, Compensation, Employees, Products, Info Center, Training, and Brief. Below this, there's a 'Show:' dropdown set to 'My Agreements' and a 'Queries:' dropdown set to 'All Valid Agreements'. The main content area is titled 'Agreements' and shows a list of agreements. Below this, there's a section for 'My Agreement:' with a list of fields: Agreement #, Name, Type, Status, Account, Last Name, First Name, and Valid. Each field has a dropdown arrow. Below this, there's a section for 'More Info' with a list of fields: Agreement #, Name, Account, Site, Type, Status, Last Name, First Name, Team, Approver, Revision, Valid, Effective, Start, End, and Parent. Each field has a text input or dropdown arrow.

The fields displayed are self-explanatory. After viewing the details click Close to quit from the Siebel screen.

Click the Account hyperlink from WebLogic Portlets for Siebel – Agreements By Expiry Date Portlet. And the Siebel screen as illustrated in the following screen is displayed.

Figure 46 WebLogic Portlets for Siebel – Agreements By Expiry Date Portlet Account details Siebel Screen

The screenshot shows the Siebel 'Agreements By Expiry Date' portlet. At the top, there's a navigation bar with tabs like Home, Opportunities, Accounts, Contacts, Activities, Calendar, Quotes, Forecasts, Revenues, Compensation, Employees, Products, and Info Center. Below this, a 'Show:' dropdown is set to 'My Agreements' and a 'Queries:' dropdown is set to 'All Valid Agreements'. The main table lists agreements, with the first row highlighted: Agreement # 1-92937, Name 1-1ZPL, Type Service Level Agree, Status Current, Account Oracle, Last Name Aceman, First Name Mark, and Valid checked. Below the table, there's a 'More Info' section with various fields: Agreement # (1-92937), Type (Service Level Agreement), Status (Current), Last Name (Aceman), First Name (Mark), Team (ADMIN), Approver (ADMIN), Effective date (2/6/2004 12:00:00 AM), Start date (2/6/2004 12:00:00 AM), End date (7/10/2004 5:50:35 PM), and Parent (blank). The 'Valid' checkbox is checked.

The fields displayed are self-explanatory. After viewing the details click Close to quit from the Siebel screen.

All Assets By Account Portlet

The following operations that can be performed from the All Assets By Account Portlet:

- To View All Assets By Account

In order to view Asset details by account scroll to the All Assets By Account Portlet. And a screen as illustrated in the following figure is displayed:

Figure 47 WebLogic Portlets for Siebel – All Assets By Account Portlet Screen

The screenshot shows the Siebel 'All Assets By Account' portlet. It features a table with columns: Asset #, Serial #, Asset Tag, Asset Description, Product, Part #, Quantity, Account, Site, Install Date, and Status. The table contains six rows of data. At the bottom, there's a pagination control showing '1 - 5 of 9'.

| Asset # | Serial # | Asset Tag | Asset Description | Product | Part # | Quantity | Account | Site | Install Date | Status |
|----------|----------|-----------|----------------------------------|-------------------|-------------------|----------|---------|------|--------------|--------|
| 1-103133 | | | Sales Text For Laptop Model 2100 | Laptop Model 2100 | Laptop Model 2100 | 1 | DELL333 | | | |
| 1-103129 | | | InMotion 150XL System | InMotion 150XL | IM-150 | 1 | DELL222 | | | |
| 1-103125 | | | InMotion 150XL System | InMotion 150XL | IM-150 | 1 | DELL222 | | | |
| 1-103121 | | | Packaged Product | Package | SEBLRSVLP1 | 1 | DELL111 | | | |
| 1-103117 | | | Nokia 5190 Slick | Nokia 5190 | Nokia 5190 | 1 | DELL111 | | | |

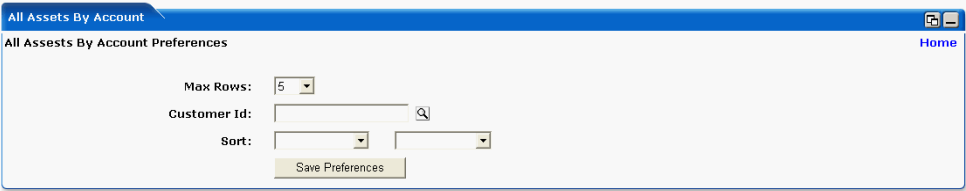
The above displayed screen can be divided into two parts:

The first part contains details like: Asset#, Serial#, Asset Tag, Asset Description, Product, Part #, Quantity, Account, Site, Install Date, and Status, which are self explanatory from the above displayed screen.

The second part can be categorized as the actions that can be performed for All Assets By Account portlet. Action buttons available are: Maximize, Minimize, and Edit preferences for All Assets By Account portlet.

Click on Edit Preferences hyperlink. A screen as illustrated in the following figure is displayed.

Figure 48 WebLogic Portlets for Siebel – All Assets By Account Portlet Edit Preferences Screen



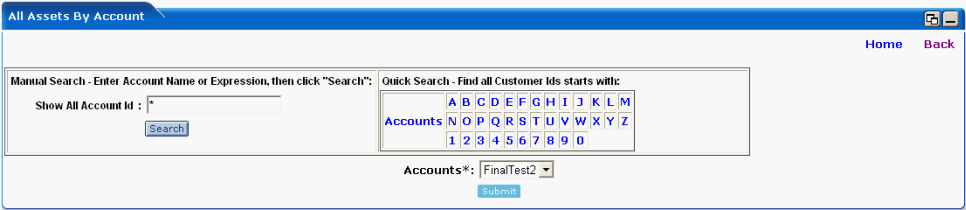
Maxrows

Depending on the value selected in the Maxrows field, the All Assets By Account portlet will only display the first few records and the user can then navigate for rest of the records using Previous and Next buttons, which are available at the bottom left of the All Assets By Account portlet.

Customer Id

Click Browse icon (magnify icon), which is display a screen as illustrated in the following figure.

Figure 49 WebLogic Portlets for Siebel – All Assets By Account Portlet Edit Preferences –Customer ID (Account ID) search screen



1. Use any one of the following in the search criteria:

- a. Enter the Account and click search.
 - b. Click on Accounts link.
 - c. Click on an alphabet with which the account name starts.
2. The list of Accounts matching the search criteria are populated in the Accounts drop down box.

Click on Back hyperlink and the control is returned back to All Assets By Account Portlet Edit Preferences Screen.

Click on Home hyperlink to quit from the existing screen and return back to Sales Order portlet.

After entering the details, click Submit.

The following are the remaining fields of WebLogic Portlets for Siebel – All Assets By Account Portlet Edit Preferences Screen:

Sort

Select the sorting order.

Action buttons available are: Maximize, Minimize, and Home.

Click on Home hyperlink to quit from the edit preferences screen.

After entering the details, click on SavePreferences.

Viewing an existing Asset By Account

In order to view details for an existing Asset by Account scroll to the All Assets By Account Portlet. And a screen as illustrated in the following figure is displayed:

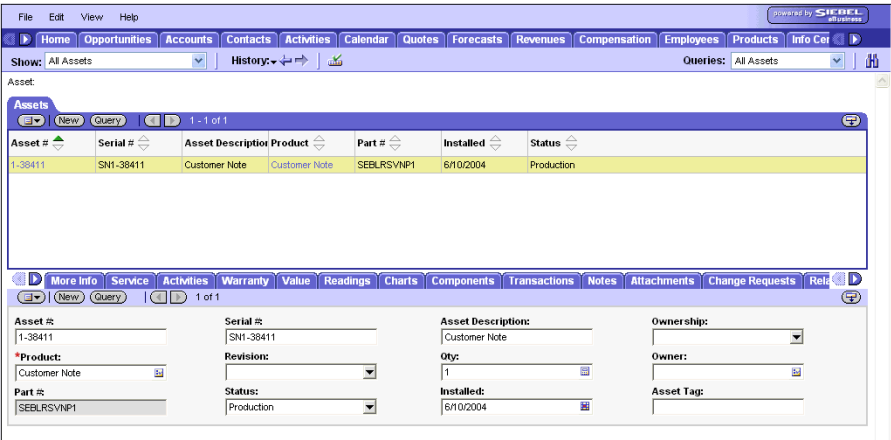
Figure 50 WebLogic Portlets for Siebel – All Assets By Account Portlet Screen

| Asset # | Serial # | Asset Tag | Asset Description | Product | Part # | Quantity | Account | Site | Install Date | Status |
|--------------------------|----------|-----------|----------------------------------|-------------------|-------------------|----------|---------|------|--------------|--------|
| 1-103133 | | | Sales Text For Laptop Model 2100 | Laptop Model 2100 | Laptop Model 2100 | 1 | DELL333 | | | |
| 1-103129 | | | InMotion 150XL System | InMotion 150XL | IM-150 | 1 | DELL222 | | | |
| 1-103125 | | | InMotion 150XL System | InMotion 150XL | IM-150 | 1 | DELL222 | | | |
| 1-103121 | | | Packaged Product | Package | SEBLRSVLP1 | 1 | DELL111 | | | |
| 1-103117 | | | Nokia 5190 Sleek | Nokia 5190 | Nokia 5190 | 1 | DELL111 | | | |

1 - 5 of 9

Click the Asset # hyperlink to view Asset details. And the Siebel screen for the Asset is displayed.

Figure 51 WebLogic Portlets for Siebel – All Assets By Account Portlet Asset Siebel screen



The fields displayed are self-explanatory. After viewing the details click Close to quit from the Siebel screen.

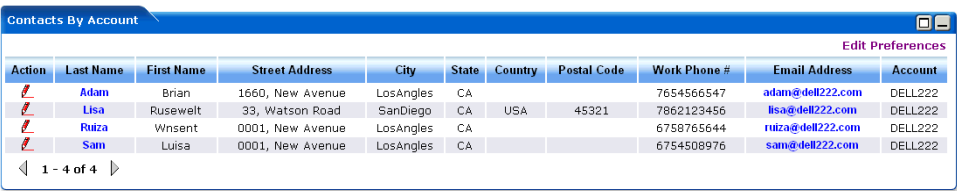
Contacts By Account Portlet

The following operations that can be performed from the Contacts By Account Portlet:

- To View Contact details by Account
- To Edit Contact details by Account

In order to view Contact details scroll to the Contacts By Account portlet. And a screen as illustrated in the following figure is displayed:

Figure 52 WebLogic Portlets for Siebel – Contacts By Account Portlet Screen



The above displayed screen can be divided into two parts:

The first part contains details like: Last Name, First Name, Street Address, City, State, County, Postal Code, Work Phone#, Email Address, and Account, which are self explanatory from the above displayed screen.

The second part can be categorized as the actions that can be performed for Contacts By Account portlet. Action buttons available are: Edit, Maximize, Minimize, and Edit Preferences for Contacts By Account portlet.

Click on Edit Preferences hyperlink. A screen as illustrated in the following figure is displayed:

Figure 53 WebLogic Portlets for Siebel – Contacts By Account Edit Preferences Screen

Maxrows

Depending on the value selected in the Maxrows field, the Contacts By Account portlet will only display the first few records and the user can then navigate for rest of the records using Previous and Next buttons, which are available at the bottom left of the Contacts By Account portlet.

Last Name

Enter Last Name of an account holder.

First Name

Enter First Name of an account holder.

Account ID

Select the account id from the selection list. Click Browse icon (magnify icon) to display a selection list.

Action buttons available are: Maximize, Minimize, and Home.

Click Home hyperlink to quit from the edit preferences screen.

After entering the details, click on SavePreferences.

Viewing an existing Contact By Account

In order to view details for an existing Contact by Account scroll to the Contacts By Account Portlet. And a screen as illustrated in the following figure is displayed:

Figure 54 WebLogic Portlets for Siebel – Contacts By Account Portlet Screen

| Action | Last Name | First Name | Street Address | City | State | Country | Postal Code | Work Phone # | Email Address | Account |
|--------|-----------------------|------------|------------------|------------|-------|---------|-------------|--------------|--|---------|
| | Adam | Brian | 1660, New Avenue | LosAngeles | CA | | | 7654566547 | adam@del222.com | DELL222 |
| | Lisa | Rusewelt | 33, Watson Road | SanDiego | CA | USA | 45321 | 7862123456 | lisa@del222.com | DELL222 |
| | Rutza | Wnsent | 0001, New Avenue | LosAngeles | CA | | | 6758765644 | rutza@del222.com | DELL222 |
| | Sam | Luisa | 0001, New Avenue | LosAngeles | CA | | | 6754508976 | sam@del222.com | DELL222 |

Click the Last Name hyperlink to view Contact details. And the Siebel screen is displayed as illustrated in the following figure.

Figure 55 WebLogic Portlets for Siebel – Contacts By Account Portlet Asset Siebel screen

File Edit View Help

powered by SIEBEL

Home Opportunities Accounts **Contacts** Activities Calendar Quotes Forecasts Revenues Compensation Employees Products Info

Show: All Contacts History Queries: All Contacts

Contact:

Contacts

New Query 1 - 1 of 1

| New | Last Name | First Name | Middle Name | Mr/Ms | Work Phone # | Job Title | Email | Account | Site |
|-----|-----------|------------|-------------|-------|----------------|----------------|------------------|---------|---------------|
| | Aceman | Mark | | Mr. | (817) 218-3196 | System Manager | macerma@kmart.co | Oracle | San Francisco |

More Info Accounts Activities Campaigns Campaigns - Manager Notes Opportunities Profile Responses Responses - Manager Service

New Query 1 of 1

*Last Name: Aceman Work Phone #: (817) 218-3196 Mr/Ms: Mr. Account: Oracle

*First Name: Mark Address Line 1: 1657, New Avenue City: San Francisco Site: San Francisco

Middle Initial: Address Line 2: State: CA Email: macerma@kmart.co.in

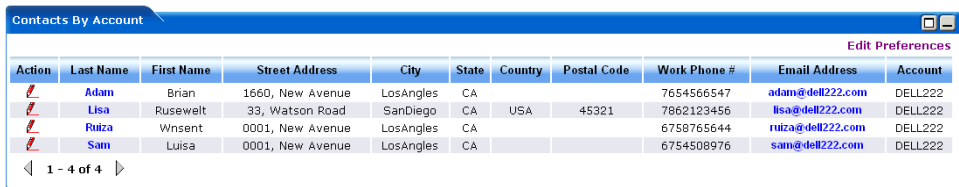
Job Title: System Manager ZIP: 23456 Country: USA Never Email: ☐

The fields displayed are self-explanatory. After viewing the details click Close to quit from the Siebel screen.

To Edit / Update an existing Contact By Account

In order to update details for the required Contact scroll to the Contacts By Account Portlet. A screen as illustrated in the following figure is displayed:

Figure 56 WebLogic Portlets for Siebel – Contacts By Account Portlet Screen

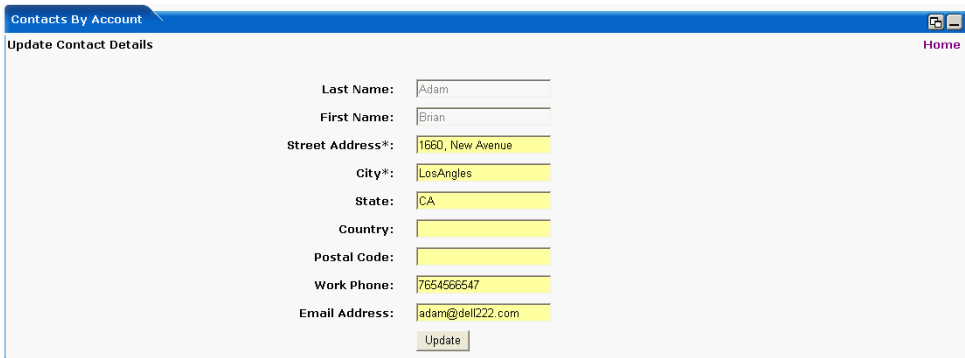


| Action | Last Name | First Name | Street Address | City | State | Country | Postal Code | Work Phone # | Email Address | Account |
|--------|-----------|------------|------------------|------------|-------|---------|-------------|--------------|-------------------|---------|
| | Adam | Brian | 1660, New Avenue | LosAngeles | CA | | | 7654566547 | adam@del1222.com | DELL222 |
| | Lisa | Rusewelt | 33, Watson Road | SanDiego | CA | USA | 45321 | 7862123456 | lisa@del1222.com | DELL222 |
| | Rutza | Wnsent | 0001, New Avenue | LosAngeles | CA | | | 6758765644 | rutza@del1222.com | DELL222 |
| | Sam | Luisa | 0001, New Avenue | LosAngeles | CA | | | 6754508976 | sam@del1222.com | DELL222 |

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Click Edit icon (pencil icon) to update the Contact details.

Figure 57 WebLogic Portlets for Siebel – Edit Contacts By Account Portlet Screen



Update Contact Details

Home

Last Name:

First Name:

Street Address*:

City*:

State:

Country:

Postal Code:

Work Phone:

Email Address:

Last Name

This field displays the Last Name of an account holder. This field is not updatable.

First Name

This field displays the First Name of an account holder. This field is not updatable.

Street Address

This field displays the address details of the account holder. This field is updatable.

City

This field displays the City that the account holder belongs to. This field is updatable.

State

This field displays the State that the account holder belongs to. This field is updatable.

Country

This field displays the Country that the account holder belongs to. This field is updatable.

Postal Code

This field displays the Zip code or the postal code of the account holder. This field is updatable.

Work Phone

This field displays the personal contact number of the account holder. This field is updatable.

Email Address

This field displays the personal electronic mail of the account holder. This field is updatable.

Once the changes are updated, click Update.

Customer List with Address Info Portlet

The following operations that can be performed from the Customer List with Address Info Portlet:

- To View List of Customer with Address Info
- To Edit / update List of Customer with Address Info

In order to view list of Customer with Address details scroll to the Customer List with Address Info portlet. And a screen as illustrated in the following figure is displayed:

Figure 58 WebLogic Portlets for Siebel – Customer List with Address Info Portlet Screen

| Action | Name | Street Address | City | State | Postal Code |
|--------|---------------|------------------|------------|-------|-------------|
| | BEA1 | 42 James Street | Capitana | CA | 234567 |
| | DELL111 | 14 James Street | Moulin | CA | 3456789 |
| | DELL222 | 111 Maruti Sadan | Hyderabad | CA | 345674 |
| | DELL333 | 13,Down Street | New Jersey | NY | 567894 |
| | Doits Company | 66, New Drive | Chicago | IL | 67543 |

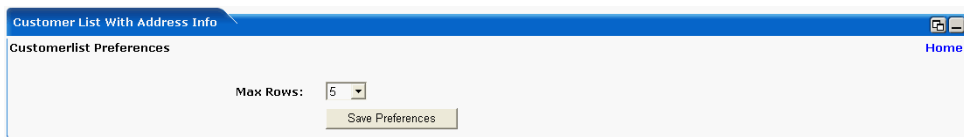
The above displayed screen can be divided into two parts:

The first part contains details like: Name, Street Address, City, State, and Postal Code, which are self explanatory from the above displayed screen.

The second part can be categorized as the actions that can be performed for Customer List with Address Info portlet. Action buttons available are: Edit, Maximize, Minimize, and Edit preferences for Customer List with Address Info portlet.

Click on Edit Preferences hyperlink. A screen as illustrated in the following figure is displayed:

Figure 59 WebLogic Portlets for Siebel – Customer List with Address Info Portlet Edit Preferences Screen



Maxrows

Depending on the value selected in the Maxrows field, the Customer List With Address Info portlet will only display the first few records and the user can then navigate for rest of the records using Previous and Next buttons, which are available at the bottom left of the Customer List With Address Info portlet.

Action buttons available are: Maximize, Minimize, and Home.

Click Home hyperlink to quit from the edit preferences screen.

After entering the details, click on SavePreferences.

To Edit / Update an existing Customer Address Info

In order to update Customer Address details for the required Customer scroll to the Customer List With Address Portlet. A screen as illustrated in the following figure is displayed:

Figure 60 WebLogic Portlets for Siebel – Customer List With Address Info Portlet Screen

| Action | Name | Street Address | City | State | Postal Code |
|--------|---------------|------------------|------------|-------|-------------|
| | BEA1 | 42 James Street | Capitana | CA | 234567 |
| | DELL111 | 14 James Street | Moulin | CA | 3456789 |
| | DELL222 | 111 Maruti Sadan | Hyderabad | CA | 345674 |
| | DELL333 | 13,Down Street | New Jersey | NY | 567894 |
| | Doits Company | 66, New Drive | Chicago | IL | 67543 |

Click Edit icon (pencil icon) to update the Address information.

Figure 61 WebLogic Portlets for Siebel – Edit Customer List With Address Info Screen

The screenshot shows a web application window titled "Customer List With Address Info". Inside, there's a sub-header "Update Customer Address Details". The form contains the following fields and values:

- Customer Name: BEA1
- Street Address: 42 James Street
- City: Capitana
- State: CA
- Postal Code: 234567

At the bottom right of the form is an "Update" button. The window also has a "Home" link in the top right corner.

Customer Name

This field displays the Last and First Name of a Customer. This field is not updatable.

Street Address

This field displays the address details of the Customer. This field is updatable.

City

This field displays the City that the Customer belongs to. This field is updatable.

State

This field displays the State that the Customer belongs to. This field is updatable.

Postal Code

This field displays the Zip code or the postal code of the Customer. This field is updatable.

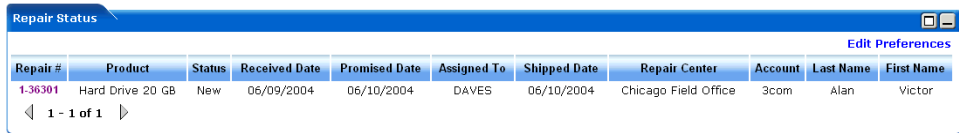
Once the changes are updated, click Update.

Repair Status Portlet

The following operations that can be performed from the Repair Status Portlet:

- To View Repair Status

In order to view repair status scroll to the Repair Status portlet. And a screen as illustrated in the following figure is displayed:

Figure 62 WebLogic Portlets for Siebel – Repair Status Portlet Screen


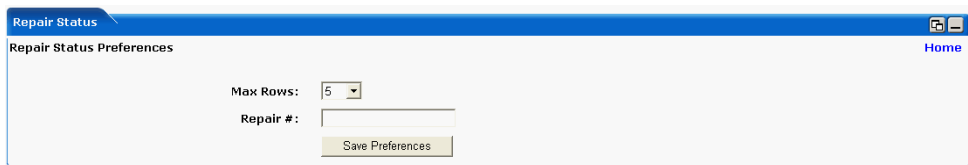
| Repair # | Product | Status | Received Date | Promised Date | Assigned To | Shipped Date | Repair Center | Account | Last Name | First Name |
|----------|------------------|--------|---------------|---------------|-------------|--------------|----------------------|---------|-----------|------------|
| 1-36301 | Hard Drive 20 GB | New | 06/09/2004 | 06/10/2004 | DAVES | 06/10/2004 | Chicago Field Office | 3com | Alan | Victor |

1 - 1 of 1

The above displayed screen can be divided into two parts:

The first part contains details like: Repair #, Product, Status, Received Date, Promised Date, Assigned To, Shipped Date, Repair Center, Account, Last Name, and First Name, which are self explanatory from the above displayed screen.

The second part can be categorized as the actions that can be performed for Repair Status portlet. Action buttons available are: Maximize, Minimize and Edit preferences for Repair Status portlet. Click on Edit Preferences hyperlink. A screen as illustrated in the following figure is displayed:

Figure 63 WebLogic Portlets for Siebel – Repair Status Portlet Edit Preferences Screen


Repair Status Preferences

Max Rows:

Repair #:

[Home](#)

Maxrows

Depending on the value selected in the Maxrows field, the Repair Status portlet will only display the first few records and the user can then navigate for rest of the records using Previous and Next buttons, which are available at the bottom left of the Repair Status portlet.

Repair

Enter the repair order number.

Action buttons available are: Maximize, Minimize, and Home.

Click on Home hyperlink to quit from the Edit Preferences screen.

After entering the details, click on SavePreferences.

RMA Order Status Portlet

The following operations that can be performed from the RMA Order Status Portlet:

- To View the RMA Order Status
- To View the Account

In order to view list of RMA order statuses scroll to the RMA Order Status portlet. And a screen as illustrated in the following figure is displayed:

Figure 64 WebLogic Portlets for Siebel – RMA Order Status Portlet Screen



The screenshot shows the 'RMA Order Status' portlet interface. It features a table with six columns: Order #, Order Date, Order Type, Status, Sales Rep, and Account. The table contains five rows of data. At the bottom left, it indicates '1 - 5 of 25' items. At the top right, there is an 'Edit Preferences' link.

| Order # | Order Date | Order Type | Status | Sales Rep | Account |
|--------------------------|------------|-------------|--------|-----------|---------------------------|
| 1-100501 | 02/11/2004 | Sales Order | Open | DAVES | |
| 1-100509 | 02/11/2004 | Sales Order | Open | DAVES | |
| 1-100701 | 02/11/2004 | Sales Order | Open | DAVES | FISHER111 |
| 1-104601 | 07/14/2004 | Sales Order | Open | DAVES | Oracle |
| 1-104901 | 07/14/2004 | Sales Order | Open | DAVES | |

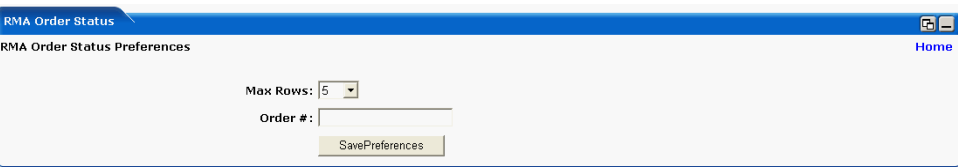
The above displayed screen can be divided into two parts:

The first part contains details like: Order#, Order Date, Order Type, Status, Sales Rep, and Account, which are self explanatory from the above displayed screen.

The second part can be categorized as the actions that can be performed for RMA Order Status portlet. Action buttons available are: Maximize, Minimize, and Edit preferences.

Click on Edit Preferences hyperlink. A screen as illustrated in the following figure is displayed:

Figure 65 WebLogic Portlets for Siebel – RMA Order Status Portlet Edit Preferences Screen



The screenshot shows the 'RMA Order Status Preferences' screen. It includes a 'Max Rows' dropdown menu set to '5', an 'Order #' text input field, and a 'SavePreferences' button. A 'Home' link is visible in the top right corner.

Maxrows

Depending on the value selected in the Maxrows field, the RMA Order Status portlet will only display the first few records and the user can then navigate for rest of the records using Previous and Next buttons, which are available at the bottom left of the RMA Order Status portlet.

Order

Enter the order number.

Action buttons available are: Maximize, Minimize and Home.

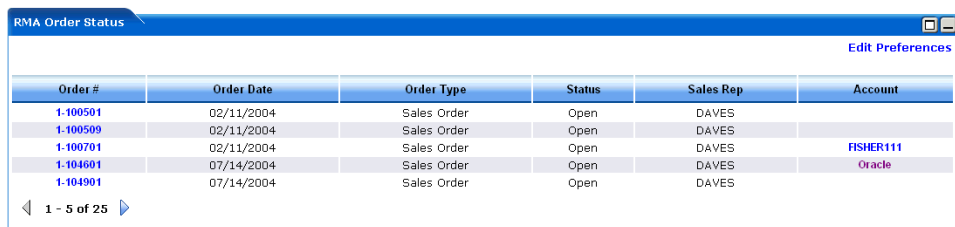
Click on Home hyperlink to quit from the Edit Preferences screen.

After entering the details, click on SavePreferences.

Viewing an existing RMA Order Status

In order to view list of RMA order statuses scroll to the RMA Order Status portlet. And a screen as illustrated in the following figure is displayed:

Figure 66 WebLogic Portlets for Siebel – RMA Order Status Portlet Screen



| Order # | Order Date | Order Type | Status | Sales Rep | Account |
|--------------------------|------------|-------------|--------|-----------|---------------------------|
| 1-100501 | 02/11/2004 | Sales Order | Open | DAVES | |
| 1-100509 | 02/11/2004 | Sales Order | Open | DAVES | |
| 1-100701 | 02/11/2004 | Sales Order | Open | DAVES | FISHER111 |
| 1-104601 | 07/14/2004 | Sales Order | Open | DAVES | Oracle |
| 1-104901 | 07/14/2004 | Sales Order | Open | DAVES | |

1 - 5 of 25

The above displayed screen can be divided into two parts:

The first part contains details like: Order#, Order Date, Order Type, Status, Sales Rep, and Account, which are self explanatory from the above displayed screen.

The second part can be categorized as the actions that can be performed for RMA Order Status portlet. Action buttons available are: Maximize, Minimize, and Edit preferences.

Click on Order# hyperlink. A screen as illustrated in the following figure is displayed:

Figure 67 WebLogic Portlets for Siebel – RMA Order Status – Order Siebel Screen

The screenshot shows the Siebel 'Service Orders' screen. The top navigation bar includes 'Home', 'Opportunities', 'Accounts', 'Contacts', 'Activities', 'Calendar', 'Quotes', 'Forecasts', 'Revenues', 'Compensation', 'Employees', 'Products', and 'Info Center'. The 'Show:' dropdown is set to 'My Service Orders'. The 'Queries:' dropdown is set to 'All Orders this Week'. The 'Service Orders' table has columns: State, Order #, Type, Status, Priority, Order Date, Account, Last Name, and First Name. The first row shows: State: [icon], Order #: 1-142401, Type: RMA Return, Status: Open, Priority: Medium, Order Date: 8/20/2004 2:41:14 # Oracle, Last Name: Brad, First Name: Joseph. Below the table, the 'More Info' tab is selected, showing details for Order # 1-142401. The details are organized into sections: Order #, Type, Account, Site, Priority, Status, Last Name, First Name, Team, Organization, Currency, Price List, Description, Opportunity, Quote #, and SR #.

| State | Order # | Type | Status | Priority | Order Date | Account | Last Name | First Name |
|--------|----------|------------|--------|----------|----------------------------|---------|-----------|------------|
| [icon] | 1-142401 | RMA Return | Open | Medium | 8/20/2004 2:41:14 # Oracle | Brad | Joseph | |

Order #: 1-142401
Type: RMA Return
Account: Oracle
Site: San Francisco
Priority: Medium
Status: Open
Last Name: Brad
First Name: Joseph
Team: SADMIN
Organization: Default Organization
Currency: USD
Price List: Default_YrWh_Discount
Description:
Opportunity:
Quote #:
SR #:

The fields displayed are self explanatory. After viewing the details click on close to quit from the Siebel screen.

Click on Account hyperlink. A screen as illustrated in the following figure is displayed:

Figure 68 WebLogic Portlets for Siebel – RMA Order Status – Account Siebel Screen

The screenshot shows the Siebel 'Accounts' screen. The top navigation bar is the same as in Figure 67. The 'Show:' dropdown is set to 'All Accounts'. The 'Queries:' dropdown is set to 'All Accounts'. The 'Accounts' table has columns: Name, Site, Main Phone #, Territories, Industries, Status, and URL. The first row shows: Name: Oracle, Site: San Francisco, Main Phone #: (412) 230-9089, Territories: [icon], Industries: [icon], Status: Active, URL: www.oracle.com. Below the table, the 'More Info' tab is selected, showing details for Account # 1-142401. The details are organized into sections: Name, Site, Main Phone #, Main Fax #, Current Volume, Potential Volume, Account Team, Parent, Account Type, Status, Stage, Expertise, Partner, Competitor, Reference, and PO Approved.

| Name | Site | Main Phone # | Territories | Industries | Status | URL |
|--------|---------------|----------------|-------------|------------|--------|----------------|
| Oracle | San Francisco | (412) 230-9089 | [icon] | [icon] | Active | www.oracle.com |

Name: Oracle
Site: San Francisco
Main Phone #: (412) 230-9089
Main Fax #: (412) 230-9088
Current Volume:
Potential Volume:
Account Team: SADMIN
Parent:
Account Type:
Status: Active
Stage:
Expertise:
Partner:
Competitor:
Reference:
PO Approved:

The fields displayed are self explanatory. After viewing the details click on close to quit from the Siebel screen.

