

# **BEA**WebLogic Portal™

WebLogic Portlets for Siebel User Guide

Version 8.1 with Service Pack 3 (Siebel Portlets Version 1.0) Document Revised: September 2004

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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 User Guide

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

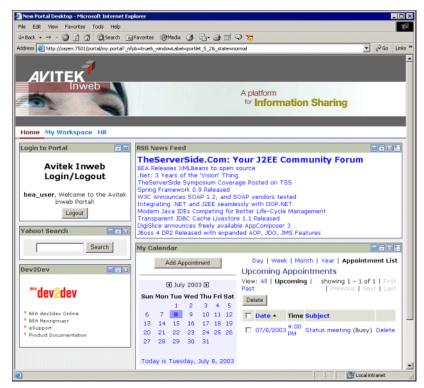
### Introduction

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:

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)

Table 1 List of business processes for BEA WebLogic Portlets

# Acronyms, Abbreviations, and Definitions

Acronym	Definition
во	Business Objects
ERP	Enterprise Resource Planning
RMA	Return Material Authorization
BC	Business Component

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

# 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>

WebLogic Portlets for Siebel User Guide

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

Login					
Welcome BEA WebLogic Portal User					
Please enter your usernam password below.	e and				
Username:					
Password:	]				
Sign In					

### 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:

	Gales Order Order #	Order Date	Ship Date	Currency	Status	Amount	Sales Rep	Customer N	Edit Preferenc Iame Priority
		07/20/2004	07/22/2004	USD	Open	5.7	DAVES	Smart Solut	ions Medium
1	1-128501	07/19/2004	07/23/2004	USD	Open	13500	DAVES	Kernex	Medium
	1-128301	07/19/2004	07/20/2004	USD	Open	0	DAVES	DELL22	2 Medium
		07/17/2004	10/30/2004 07/20/2005	USD	In-transit Booked	159.25 50.0	DAVES	Oracle FinalTest	
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A Automatica	111001-07/14/07	004	Open Medium	Insta	llation Enter t		r Service Reque	an Oracle in Mars	dia see
ActMty 1	-114101 07/16/3	:004	Open Medium	Insta	llation	test crea Hard Drve	te123	Oracle 3-Mer	dium Hard Drive 20 G dium Hard Drive 20 G dium Nokia 5190
Activity 1	10500107/16/2	1004	Open Medium Open Medium	Insta	llation llation	Hard Drve testys	Crash IIII	Oracle 3-Mer	fum Hard Drive 20 u fium Nokia \$190
🗶 Activity 1	-105601 07/15/2 -109501 07/15/2	:004	Open Medium	Insta	llation	testro	à*(	Oracle 3-Mac	fiumLaptop Model 21
∛ 1-5 of	7 🕨								
Service Requ	est Activity	\ \	Please Cit	k On the Activity of	'Service Reque	I" Portlet to Begi	n		٥
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Create New A									Edit Preferenc
Action Acc	count Name	Account ID	Street Address 66, New Drive	City	State 1	212121212	Account Type	Account Statue	s URL
L 1	ts Company FinalTest2	1-2LTT	14 R C Road	Chicago Hacker City	л. 12 NY 5	12121212 5677214	Partner	Active	www.yahos.com mysierra
/ F	FinalTest1	1-2IL5	test	testcity1	CA		Customer	Active	
7	BEA1 HP		42 James Street Winsent avenus	Capitana Greenland	CA VA 51	15241000	Partner	Active	www.bea.com
€   1-5 of	9 🕨	1 0 10		or offender of	81				
My Team Acc	counts								0
		Site	Aain Phone #	Main Fax #	Arre	Int Type	Accaupt	itatus	Edit Preferenc Team Member
4 0 - 0 of			. none -				Accedit		
Agreements	By Expiry Dat								•
			Effective Date	Start Date		and Date		Turne	Edit Preferenc Status
Agreement	# Name 1-24V2	Account	Effective Date 02/08/2004	Start Date		and Date 2004 16:45:12		Type rice Level Agree	ment O ment
1-99621	1-24V9	Oracle	02/08/2004	02/08/2004 02/08/2004	10/21/	2004 16:45:03	i Sen	rice Level Agree	ment Current
1-108205	1-28HP	Oracle	07/15/2004	07/15/2004	11/10/	2004 16:55:12	Sen	vice Level Agree	ment Current
1-108258	1-2835 1-283D		07/15/2004 07/15/2004	07/15/2004	07/23/	2004 17:00:07	Sen	rice Level Agree	ment Current
∛ 1-5of									
All Assets By	Account								0
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1.103133		Sales Text	For Laptop Model 210 IONL System	10 Laptop M	fodel 2100	Laptop Mod	el 2100 1	DELL333	
1-103129						UM-15	0 1	DEIL222	
1-103125 1-103121 1-103117		Packaged P Nokia \$190	roduct	Package Nokia 51	* JUAL	SEBLRSV	UP1 1	DELL111	
1-103117		Nokia \$190	Sleek	Nokia 51	90	Nokia S		DELL111	
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Contacts By	Account								Edit Preferenc
Action Last	Ame Fint		Street Address	City Sta LosAngles CA	te Country	Postal Code	765456654	7 adamātas	Account
	isa Ruse	welt 3	3, Watson Road	SanDiego C/	usa Usa	45321	786212345	7 alanga 6 <b>isag</b> del	222.com DELL22
1 L	uiza Wh		01, New Avenue 01, New Avenue				675876564	4 ruiza@del	222.com DELL22 222.com DELL22 222.com DELL22
1		isa 00	O1, NEW AVENUE	cosangles Ca			0754506971	o sangdel	UEUL22
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/ L / R / S	+ Þ	s Info				_			
L L L R L S √ 1-+of CustomerLis	+ D	s Info		reet Address		0+-		State	Edit Preferenc
L L L Pa L S √ 1 - + of CustomerLis Action	+ b		42	reet Address James Street		City Capita	<b>1</b> 9	State CA	Edit Preferenc Pestal Code 234567
L L L Pa L S √ 1 - + of CustomerLis Action	+ b st with Address Name BEA1 DEU111		42	James Street		Capita Moda	na 2		Edit Preferenc Pestal Code 234567 2456700
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	↓ ↓     Name     BEA1     OELL37     O	Status Re New 01 Order D 02/11/20	42 14 11 11 13 33 60 60 60 60 60 60 60 60 60 60	Arrene Strevel Jarone Strevel Marchi Gadan Down Strevel , New Drive ed Date Assign V2004 DAV	ed To Ship /es oc/	Capita Mouli Hydera New Ja Chicag and Date (0/2004 Ch Status Open Open Open Open	na no rsy rsy no Repair Center icogo Field Offic Sales R DAVE DAVE	CA CA CA NY R R E e Scom Kep S S S	EdB Profession 294467 294467 294567 294579 294579 2945749 295794 50795 50795
	↓ ↓     Name     BEA1     OELL37     O	Status Re New Or Order Dr 02/11/20	42 14 11 11 13 33 60 60 60 60 60 60 60 60 60 60	Arrend Street James Street Marvio Sador Down Street , New Drive Pd Date Assign V2004 DAV Order Type Sales Order Sales Order	ed To Skip	Capita Modil Hyderio New Ja Chicag 200 Date 0/2004 Ch Status Open Open	na h Sad sy o Repair Center icogo Field Offic Sales R DAVE DAVE	CA CA CA NY IL R R S S S S	EdB Proference 294567 3945789 394574 394574 394574 394574 39794 07543 07543 07543 07543 07543 07543 07543 07543 07543 07544 0754 075

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

**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

reate New Sales Order Edit Preferen											
Action	Order #	Order Date	Ship Date	Currency	Status	Amount	Sales Rep	Customer Name	Priority		
L	1-120901	07/17/2004	10/30/2004	USD	In-transit	63	DAVES	Oracle	Medium		
1	1-119601	07/17/2004	07/20/2005	USD	Booked	50.8	DAVES	FinalTest1	High		
1	1-119501	07/17/2004	07/14/2006	USD	Open	0	DAVES	DELL111	Medium		
1	1-119301	07/17/2004	07/31/2004	USD	Open	0	DAVES		Medium		
1	1-113201	07/16/2004	07/31/2004	USD	Open	12825	DAVES	Oracle	Medium		
	of 19 🕨	0,,10,2001	0.,01,2001			1000	54725		modul		

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

der#: iales Orders ⊡•> (New)			of 1						Ŧ
State	Order # 🚔	Type 😄	Status 🚔	Priority 🚔	Order Date 🚔	Account 🚔	Last Name 🚔	First Name 🚔	
	1-120601	Sales Order	Open	Medium	7/17/2004 4:43:09 A	Oracle	Aceman	Mark	
<b></b> (New)	nfo Line Items Query   (	Terms Payme D 1 of 1		s Charts					O
Order#:		Priority		_	Team: SADMIN		Descripti	on:	
1-120601		Medium *Status		•	Organization:				
Type: Sales Order	•	Open	•	•	Default Organization	n 🖬	Opportui	- He	
ccount:		Last Na	me:	_	*Currency:		opportui	iny:	
Dracle	E.	Acema		10	USD		Quote #	_	
ite:		First Na	me:		Price List:				
SanFransisco		Mark			Default_With_Disco	unt 🔛	SR #		
Sammansisco									

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

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:

eate Ne	w Sales Orde	r						Edi	t Preferenc
Action	Order#	Order Date	Ship Date	Currency	Status	Amount	Sales Rep	Customer Name	Priority
L	1-120901	07/17/2004	10/30/2004	USD	In-transit	63	DAVES	Oracle	Medium
1	1-119601	07/17/2004	07/20/2005	USD	Booked	50.8	DAVES	FinalTest1	High
1	1-119501	07/17/2004	07/14/2006	USD	Open	0	DAVES	DELL111	Medium
1	1-119301	07/17/2004	07/31/2004	USD	Open	0	DAVES		Medium
1	1-113201	07/16/2004	07/31/2004	USD	Open	12825	DAVES	Oracle	Medium
1 - 5 (	i of 19 🕨								

### Figure 6 WebLogic Portlets for Siebel Sales Order Portlet Screen

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

File Edit V	/iew Help										powerer	d by SIEBEL eBusines
Home	Opportunities	Accounts Conta	ts Activities	Calendar Quote	s Forecasts	Revenues C	ompensation	Employees	Products	Info Center	Training	Briefi 🖉 🕨
ow: All Acco	unts	- His	ory:+(===>   d	5						Queries: 🛛	II Accounts	-
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IT New	Query)	Ď 1-1 of 1										E
llew 🔶	Name $\Leftrightarrow$	Site 🚔	Main Phone # 3	🗦 Territories 😄	Industries $\Leftrightarrow$	Status $\Leftrightarrow$	URL 🚔					
	Oracle	SanFransisco	(412) 230-9089			Active	www.ora	ele.com				
	nfo Activities		nents <sup>Y</sup> Contacts	ESP Notes	Opportunities Ť	Profile <sup>Y</sup> Rever	nues Service	Profile 🎽 Sei	vice Request	з 🎽 Ассоил	t D&B Report	
New)		▶ 1 of 1		ŤESP ŤNotes Ť			nues   Service	Profile 🎽 Sei		s TAccoun	t D&B Report	
<b>]▼   (New)</b> ame:		▶ 1 of 1	urrent Volume:	ESP Notes	Acc	Profile Rever	nues Ì Service	Profile 🎽 Set	vice Request	s ) Ассоип	t D&B Report	
ame: racle		▶ 1 of 1 (			Acc	ount Type: stomer		Profile   Sel	Partner:		t D&B Report	s A I
ame: racle e:		▶ 1 of 1 (	urrent Volume:		Acc Cu: Stat	ount Type: stomer		Profile Ť Sei	Partner:		t D&B Report	
ame: racle e: anFransisco ain Phone #:	) Query)   (	▶ 1 of 1 [ [ [	urrent Volume: otential Volume: .ccount Team:		Acc Cu: Stat	ount Type: stomer tus: tive	<b>.</b>	Profile Ť Sei	Partner:		t D&B Report	
	) Query)   (	1 of 1	urrent Volume: otential Volume:		Acc Cu Stat Ac Stay	ount Type: stomer tus: tive		Profile Šer	Partner:	:	t D&B Report	

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:

reate Ne	ew Sales Orde	r						Edi	t Preference
Action	Order #	Order Date	Ship Date	Currency	Status	Amount	Sales Rep	Customer Name	Priority
1	1-120901	07/17/2004	10/30/2004	USD	In-transit	63	DAVES	Oracle	Medium
1	1-119601	07/17/2004	07/20/2005	USD	Booked	50.8	DAVES	FinalTest1	High
1	1-119501	07/17/2004	07/14/2006	USD	Open	0	DAVES	DELL111	Medium
1	1-119301	07/17/2004	07/31/2004	USD	Open	0	DAVES		Medium
1	1-113201	07/16/2004	07/31/2004	USD	Open	12825	DAVES	Oracle	Medium
	5 of 19 🕨	07/10/2004	07/31/2004	050	Open	12025	DAVES	Oracle	meaium
╡ 1-:	5 of 19 🕨	07/10/2004	07/31/2004	050	Open	12025	DAVES	Ulacie	Medium
↓ 1 - : hipping reate Ne	5 of 19 🕨 Status ew Line Item	Vumber: 1-12090:		050	Open	12025	DAVES	Unacte	
↓ 1 - : hipping reate Ne etails Of	5 of 19 🕨 Status ew Line Item	Number: 1-12090	1	uantity Shipped	Status		DAVES	Net Price Total Pric	

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

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 Skipped, 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	6
Update Sales Order Line Item	Home
Order#:	1-120901
Line Number:	1
Product:	Nokia 5190
Quantity Requested:	2
Item Price:	31.5
Line Total Amount:	63
Status:	In-transit
Discount:	10
	Update

### Order #

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

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### 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:

reate N	ew Sales Orde	r						Edi	t Preference
Action	Order #	Order Date	Ship Date	Currency	Status	Amount	Sales Rep	Customer Name	Priority
L	1-120901	07/17/2004	10/30/2004	USD	In-transit	63	DAVES	Oracle	Medium
1	1-119601	07/17/2004	07/20/2005	USD	Booked	50.8	DAVES	FinalTest1	High
L	1-119501	07/17/2004	07/14/2006	USD	Open	0	DAVES	DELL111	Medium
1	1-119301	07/17/2004	07/31/2004	USD	Open	0	DAVES		Medium
1	1-113201	07/16/2004	07/31/2004	USD	Open	12825	DAVES	Oracle	Medium
nipping	Status								
eate N	ew Line Item	Jumber: 1-120901							
eate N stails O	ew Line Item			uantity Shipped	Status	Actual S	hipment Date	Net Price Total Price	

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

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	Home
Line Item: Quantity Requested:	
Quantity Requested: Line Item Discount:	5 -
	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			6_
		Home	Back
Manual Search - Enter Product Name or Expression, then click "Search": Show All Products : [* Search	A         B         C         D         E         F         G         H         I         K         L         M           Products         N         O         P         Q         R         S         I         V         W         X         Y         Z         1         2         3         4         5         6         7         8         9         0		
Р	roduct Name*: Nokia 5190 🔽		

15

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- 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:

eate Ne	w Sales Orde							Cui	t Preference
Action	Order #	Order Date	Ship Date	Currency	Status	Amount	Sales Rep	Customer Name	Priority
1	1-120901	07/17/2004	10/30/2004	USD	In-transit	63	DAVES	Oracle	Medium
1	1-119601	07/17/2004	07/20/2005	USD	Booked	50.8	DAVES	FinalTest1	High
1	1-119501	07/17/2004	07/14/2006	USD	Open	0	DAVES	DELL111	Medium
1	1-119301	07/17/2004	07/31/2004	USD	Open	0	DAVES		Medium
1	1-113201	07/16/2004	07/31/2004	USD	Open	12825	DAVES	Oracle	Medium
1 - 5	i of 19								

### Figure 13 WebLogic Portlets for Siebel – Sales Order Portlet Screen

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

Sales Order		G 🗖
Create Sales Order		Home
Customer Id:		9
Order Type:	Sales Order	
Order Status:	Open	
Product:		9
Quantity Requested:		
Product Discount:	• 0/0	
Priority:	-	
Promised Delivery Date:		
	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

Sales Order			6-
		Home	Back
Manual Search - Enter Account Name or Expression, then click "Search": Show All Account Id : [* Search]	A         B         C         D         F         G         H         I         J         K         L         M           Accounts         N         O         P         Q         R         T         U         W         X         Y         Z         1         2         3         4         5         6         7         8         9         0		
	Accounts*: submit		

- 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

Sales Order			6-
		Home	Back
Manual Search - Enter Product Name or Expression, then click "Search": Show All Products : * Search	A         B         C         D         E         F         H         I         I         K         L         M           Products         N         O         P         Q         R         S         T         U         V         W         X         Y         I         1         2         3         4         5         6         7         8         9         0         I         I         2         4         5         6         7         8         9         0         I         I         1         2         4         5         6         7         8         9         0         I         I         1<		
	Product Name*: 🔽 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 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

reate Ne	w Sales Orde	•						Lui	t Preference
Action	Order #	Order Date	Ship Date	Currency	Status	Amount	Sales Rep	Customer Name	Priority
1	1-120901	07/17/2004	10/30/2004	USD	In-transit	63	DAVES	Oracle	Medium
1	1-119601	07/17/2004	07/20/2005	USD	Booked	50.8	DAVES	FinalTest1	High
1	1-119501	07/17/2004	07/14/2006	USD	Open	0	DAVES	DELL111	Medium
1	1-119301	07/17/2004	07/31/2004	USD	Open	0	DAVES		Medium
1	1-113201	07/16/2004	07/31/2004	USD	Open	12825	DAVES	Oracle	Medium
1 - 5	of 19								

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		G _
Update Sales Order		Home
Or	ler#: 1-128301	
Order	Date: 07/19/2004	
Curr	usp	
Order	ype: Sales Order	
Am	punt:	
S	atus: Open 🔽	
Pri	prity: 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:

Sales Order	6 -
Sales Order Preferences	Home
Мах Воинз: 5 💌	
Order Number:	
Customer Id:	
Order Status: ****ALL***	
From Date:	
To Date:	
SavePreferences	

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

#### 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:

Servio	ce Requ	iest										
Create New Service Request E										Edit Preferences		
Action	Activity	SR #	Created	Closed Date	Status	Priority	Committed Date	Area	Summary	Account	Severity	Product Name
1	Activity	1-117001	07/16/2004		Open	Medium		Installation	Enter the summary for Service Request	Oracle	3-Medium	
1	Activity	1-114101	07/16/2004		Open	Medium		Installation	test create123	Oracle	3-Medium	Hard Drive 20 GB
1	Activity	1-112301	07/16/2004		Open	Medium		Installation	Hard Drve Crash	Oracle	3-Medium	Hard Drive 20 GB
1	Activity	1-109601	07/15/2004		Open	Medium		Installation	testyuuu	Oracle	3-Medium	Nokia 5190
1	Activity	1-109501	07/15/2004		Open	Medium		Installation	test^&*(	Oracle	3-Medium	Laptop Model 2100
4	1 - 5 of	7 🕨										
Servio	ce Requ	iest Ac	tivity									
						Please	e Click On the Acti	vity of 'Service	Request' Portlet to Begin			

### 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

Service Request	6 -
Service Request Preferences	Home
Status: Open 💌	
Severity: 3-Medium _ Q	
Account: [1-5N Q] From Date: [07/10/2001 III]	
To Date: 07/27/2007	
Max Rows: 5  Save Preferences	

### 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

Service Request			6-
		Home	Back
Manual Search - Enter Product Name or Expression, then click "Search": Show All Products : T Search	Ouick Search - Find all Customer Ms starts with: Products 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		
р	roduct Name*: 🔽		

- 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.

 Service Request
 Image: Control of the control of th

### 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
-----------	-------------------	----------------------	--------------------------

File Edit Vie	w Help							(·	owarad by SIEB	EL.
Home Op	oportunities	Accounts Contac	ts Activities C	alendar Quotes	Forecasts R	evenues Comp	ensation Employ	yees Products	Info Cer 🔘	D
how: All Service	Requests	•	History: 🗸 😓 🔿					Queries: All SR	('s 💌	T
₹#:										_
Service Reque	sts									
	Query)	Ď 1-1 of 1								Ð
New $\Leftrightarrow$	$sr # \Leftrightarrow$	Status $\Leftrightarrow$	Summary $\Leftrightarrow$		Account 🚔	Site 🚔	Last Name $\Leftrightarrow$	Work Phone # 3	😂 Owner 😂	•
	1-130701	Open	Enter the summary	for Service Request	Oracle	SanFransisco	Aceman	(817) 218-3196	SADMIN	
More Info			ıdit Trail Orders	Related SRs 1	Service Details	Service Profile Y	Solutions Surve	ey 🗍 Activity Plan		
	Activities Query) (Veri			Related SRs S	Service Details	Service Profile 🎽	Solutions Surve	ey 🎽 Activity Plan		
		Tyle 1 of Last Ila	me:		Area:		*Agent 0	pened:	(	
E # 1-130701		fy] (◀ 🕞 1 of Last Ha Acema	me:		Area:	Service Profile )	*Agent 0 7/20/2004	pened: 1 4:56:15 AM		
(IV) (New) ( SR # 1-130701 Account:		Tyle 1 of Last Ila	me:		Area:		*Agent 0	pened: 1 4:56:15 AM	(	
	Query) (Veri	fy) (T) 1 of Last Ha Acema First Ha	me: n me:		Area:		*Agent 0 7/20/2004 Agent Co	pened: 14:56:15 AM mmitted:		
	Query) (Veri	fy) ( ) 1 of 1 Last Ha Acema First Ha Mark	me: n me:		Area: Installation Subarea:		*Agent 0 7/20/2004	pened: 14:56:15 AM mmitted:		D
	Query) (Veri	fy ( ) 1 of * Last Ha Acema First Ha Mark *Status	me: n me: x		Area: Installation Subarea: Priority: Medium Severity:	<b>.</b>	*Agent 0 7/20/2004 Agent Co Agent Cic	pened: 14:56:15 AM mmitted:		
SR # 1-130701 Account: Oracle Site: SanFransisco Summary: Enter the summary	Query) (Veri	Ty C 1 of Last IIa Acema First IIa Mark *Status Open	me: n me: :: atus:		Area: Installation Subarea: Priority: Medium	-	*Agent 0 7/20/2004 Agent Co Agent Cic	pened: 4 4:56:15 AM mmitted: osed:		
	Query) (Veri	Ty C 1 or Last Ha Acema First Ha Mark *Status Open *Subst Unsssi Work P	me:		Area: Installation Subarea: Priority: Medium Severity:	<b>.</b>	*Agent 0 7/20/2004 Agent Co Agent Clo Custome	pened: 4 4:56:15 AM mmitted: osed:		

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.

	- Microsoft Int											
File Edit ∨	/iew Help		-								powarad b	
Home	Opportunities	Accounts C	ontacts Activities	Calendar Quote	s Forecasts	Revenues	Compensation	Employees	Products	Info Center	Training E	Briefi 🔍 🕟
how: All Accor	unts	•	History: 🗸 🔶 📋 💡	<u></u>						Queries: 🗚	I Accounts	•
count:												
ccounts												
	Query	🝺 1-1 of 1										3
New 🚔	Name $\Leftrightarrow$	Site 🚔	Main Phone #	🚔 Territories 🚔	Industries $\stackrel{ riangle}{\Rightarrow}$	Status 🗧						
	Oracle	SanFransiso	(412) 230-9089			Active	www.ord	icle.com				
			achments ¥ Contacts	ESP Notes	Opportunities	Profile Re	venues ) Service	e Profile   Ser	rvice Reques	ts Ť Account	D&B Reports	
		Assets Atta	achments ¥ Contacts	ESP Notes	Opportunities	Profile Re	venues T Service	e Profile   Sei	rvice Reques	ts 🎽 Account	D&B Reports	TA D
<b>∃▼</b>   <u>New</u> ame:			achments Čonfacts Current Volume:		Ac	count Type:		e Profile   Sei	Partner:	Is Account	D&B Reports	
Iame:			Current Volume:	ESP Notes	Ac Cu	count Type: ustomer	venues Šervico V	a Profile   Sei	Partner:		D&B Reports	
ame: racle e:					Ac Cu Sta	count Type: ustomer itus:		e Profile   Sei	Partner:		D&B Reports	
Iame: Iracle te: anFransisco			Current Volume:		Ac Cu Sta	count Type: ustomer ntus: ctive		9 Profile Ť Set	Partner:		i D&B Reports	
Iame: Dracle te: ianFransisco ain Phone #			Current Volume:		Ac Cu Sta	count Type: ustomer itus:		9 Profile Ť Ser	Partner:		i D&B Reports	
More Ir Mere: Dracle te: SanFransisco Iain Phone # 412) 230-9089 Iain Fax #			Current Volume: Potential Volume:		Ac Cu Sta Sta Sta	count Type: ustomer ntus: ctive	<b>.</b>	e Profile 🎽 Set	Partner:	12	D&B Reports	

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

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

Creat	e New	Service	Request									Edit Preferences
Action	Activity	SR#	Created	Closed Date S	tatus	Priority	Committed Date	Area	Summary	Account	Severity	Product Name
L	Activity	1-117001	07/16/2004	c c	) pen l	Medium		Installation	Enter the summary for Service Request	Oracle	3-Medium	
1	Activity	1-114101	07/16/2004	C	) pen l	Medium		Installation	test create123	Oracle	3-Medium	Hard Drive 20 GB
L	Activity	1-112301	07/16/2004	, c	) Dpen I	Medium		Installation	Hard Drve Crash	Oracle	3-Medium	Hard Drive 20 GB
1	Activity	1-109601	07/15/2004	C	) pen l	Medium		Installation	testyuuu	Oracle	3-Medium	Nokia 5190
1	Activity	1-109501	07/15/2004	, c	) Dpen I	Medium		Installation	test^&*(	Oracle	3-Medium	Laptop Model 210
∢	1 - 5 0	f7 🕨	tivity									

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 f	or Siebel – Service	Request –Edit Screen
-----------	---------------------	---------------------	----------------------

Service Request	B =
Update Service Request	Home
SR#:	1-117001
Abstract:	Enter the summary for Se
Area:	Installation
Commit Time:	
Status:	Open 💌
Severity:	3-Medium 💌
Priority:	Medium 🔽
	Submit

### 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

Crea	e New \$	Service	Request								Edit Preferences
Actior	Activity	SR#	Created	Closed Date Stat	us Priority	Committed Date	e Area	Summary	Account	Severity	Product Name
L	Activity	1-112301	07/16/2004	Ope	n Medium		Installation	Hard Drve Crash	Oracle	3-Medium	Hard Drive 20 GB
1	Activity	1-109601	07/15/2004	Ope	n Medium		Installation	testyuuu	Oracle	3-Medium	Nokia 5190
L	Activity	1-109501	07/15/2004	Ope	n Medium		Installation	test^&*(	Oracle	3-Medium	Laptop Model 210
1	Activity	1-109401	07/15/2004	Ope	n Medium		Installation	test	Oracle	3-Medium	Laptop Model 210
L	Activity	1-108701	07/15/2004	Ope	n Medium		Installation	Enter the summary for Service Request	Oracle	3-Medium	
iervi	ce Requ	iest Ac	tivity								
		iest Ac Activity	-								
rea	e New /	Activity	-	.08701							
Creat	e New a Is Of Se	Activity	, equest: 1-1	.08701				Comment			

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

Service Request Activity		
Create Activity	н	lome
SR Number : Status :	I-108701 In Progress	
Activity Type:	Best Actions	
Comment:		
	Create	

### 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:

Create N	Create New Account Edit Preference								Edit Preferences
Action	Account Name	Account ID	Street Address	City	State	Phone #	Account Type	Account Status	URL
L	FinalTest2	1-2LTT	14 R C Road	Hacker City	NY	55677214	Partner	Active	mysierra
1	FinalTest1	1-2IL5	test	testcity1	CA		Customer	Active	
L	BEA1	1-2IID	42 James Street	Capitana	CA		Partner	Active	www.bea.com
1	HP	1-2F1U	Wnsent avenus	Greenland	VA	5105241000			
L	Sample 12	1-2F1L	Test11	TestCity	CA				

### Figure 30 WebLogic Portlets for Siebel – My Accounts Portlet Screen

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

My Accounts	62
My Accounts Preferences	Home
Status:	***ALL***
Max Rows:	5 • Save Preferences

#### 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

Create M	lew Account								Edit Preference
Action	Account Name	Account ID	Street Address	City	State	Phone #	Account Type	Account Status	URL
L	FinalTest2	1-2LTT	14 R C Road	Hacker City	NY	55677214	Partner	Active	mysierra
L	FinalTest1	1-2IL5	test	testcity1	CA		Customer	Active	
1	BEA1	1-2IID	42 James Street	Capitana	CA		Partner	Active	www.bea.com
1	HP	1-2F1U	Wnsent avenus	Greenland	VA	5105241000			
1	Sample 12	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

	/iew Help						powered by	
				lendar Quotes	Forecasts R	Revenues Comp	ensation Employees Products Info	
how: All Accou	unts	✓ Histo	ory:				Queries: All Accounts	•
count								
ccounts								
IT New	Query)	Ď 1-1 of 1						<b>.</b>
New $\Leftrightarrow$	Name 🚔	Site 🚔	Main Phone # 🚔	Territories 🚔	Industries $\Leftrightarrow$	Status 🚔		
	Oracle	SanFransisco	(412) 230-9089			Active	www.oracle.com	
		Assets Attachm	ents Contacts	ESP Notes 1	Opportunities <sup>°</sup> P	rofile 🎽 Revenues	i ) Service Profile ) Service Requests ) i	
			ents   Contacts	ESP   Notes   (	Opportunities P	rofile 🎽 Revenues	) Service Profile   Service Requests	Acc 🗶 🗩
		🕑 1 of 1	ents Ť Contacts Ť Volume:		Account Type:		Partner:	
⊒▼   (New) lame:		D 1 of 1 Current	Volume:	ESP Notes (		rofile ) Revenues		
ame: Iame: Iracle te:		D 1 of 1 Current		2	Account Type: Customer Status:		Partner:	
Itame: Dracle Ite: CanFransisco		D 1 of 1 Current Potentia	Volume: Il Volume:		Account Type: Customer Status: Active		Partner: Competitor:	
Iame: Dracle te: SanFransisco Iain Phone #		D 1 of 1 Current Potentia Account	Volume: Il Volume: t Team:		Account Type: Customer Status:	<b>.</b>	Partner: Competitor: Reference:	
		D 1 of 1 Current Potentia	Volume: Il Volume: t Team:	2	Account Type: Customer Status: Active		Partner: Competitor:	

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

Create New Account Edit Prefer										
Action	Account Name	Account ID	Street Address	City	State	Phone #	Account Type	Account Status	URL	
L	FinalTest2	1-2LTT	14 R C Road	Hacker City	NY	55677214	Partner	Active	mysierra	
1	FinalTest1	1-2IL5	test	testcity1	CA		Customer	Active		
L	BEA1	1-2IID	42 James Street	Capitana	CA		Partner	Active	www.bea.com	
1	HP	1-2F1U	Wnsent avenus	Greenland	VA	5105241000				
<u>/</u>	Sample 12	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

My Accounts	E
Create New Account	Home
Name:	
Account Type:	Customer
Status:	Active
Expertise:	Technology
PriceList:	American
	Create

#### 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.

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# 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

Create New Account Edit Preference										
Action	Account Name	Account ID	Street Address	City	State	Phone #	Account Type	Account Status	URL	
L	FinalTest2	1-2LTT	14 R C Road	Hacker City	NY	55677214	Partner	Active	mysierra	
1	FinalTest1	1-2IL5	test	testcity1	CA		Customer	Active		
1	BEA1	1-2IID	42 James Street	Capitana	CA		Partner	Active	www.bea.com	
1	HP	1-2F1U	Wnsent avenus	Greenland	VA	5105241000				
1	Sample 12	1-2F1L	Test11	TestCity	CA					

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	
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:

				Edit Pre	ferences
Account Name	Site	Main Phone #	Account Type	Account Status	Team Member
Sample 12					DAVES
LUKES222		7896754321		Active	LUKES
LUKES111		4536789090		Active	LUKES
JOHNS111		7869099090		Active	JOHNS
HP		5105241000			DAVES

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

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	6	
My Team Accounts Preferences	Hom	e
Status:	<b>v</b>	
Sales Rep:	MY TEAM	
Account Type:	·	
Max Rows:	5 💌	
	Save Preferences	

#### 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

					Edit Pre	ferences
Account Name	Site	Main Phone #	Main Fax#	Account Type	Account Status	Team Member
Sample 12						DAVES
LUKES222		7896754321			Active	LUKES
LUKES111		4536789090			Active	LUKES
JOHNS111		7869099090			Active	JOHNS
HP		5105241000				DAVES
<b>√</b> 1-;	E of	16				

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

	/iew Help							<u> </u>	ered by SIEBEL edusiness
Home	Opportunities	Accounts Con	tacts Activities C	alendar Quotes	Forecasts	Revenues Co	ompensation Employe	ees Products	Info Cer 🔘 🕟
how: All Acco	unts	• H	listory: 🗸 🔶 🗎 🏄				Quer	ies: All Accounts	•
count									
ccounts									
	Query)	1-1 of 1							<b>(</b>
		Site 🚔	Main Phone # 🚔	Territories 🚔	Industries $\ominus$	Status 🚔			
~	Oracle	SanFransisco	(412) 230-9089	Ý	~	Active	www.oracle.com		
	- <b>-</b>	VV			¥				
	1fo Activities		hments ) Contacts )	ESP   Notes   C	Opportunities    I	Profile TReven	ues Service Profile	Service Reques	
			hments ) Contacts )	ESP   Notes   C	Opportunities	Profile Reven	iues 🎽 Service Profile 🗋	Service Reques	ts Ť Acc 🔍 D 🐨
		1 of 1 🕞 🕪	hments ČContacts Č ent Volume:		Account Type:	Profile 🍸 Reven	Partner:	Service Reques	
💷   New 'llame:		1 of 1 🕞 🕪		ESP Notes (		Profile 🎽 Reven	Partner:	Service Reques	
Ilame: Oracle		D 1 of 1			Account Type:		Partner:		
Iame: Oracle Site:		D 1 of 1	ent Volume:		Account Type: Customer		Partner:		
Imme: Oracle Site: SanFransisco		1 of 1 Curr Pote	ent Volume:		Account Type: Customer Status:		Partner: Competitor Reference:	r:	
Itame: Oracle Site: SanFransisco Main Phone #	Query	1 of 1 Curr Pote	ent Volume: ntial Volume: vunt Team:		Account Type: Customer Status: Active		Partner:	r:	
	Query	1 of 1 Curr Pote	ent Volume: ntial Volume: punt Team: MIN		Account Type: Customer Status: Active		Partner:	r:	

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:

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

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

Agreements By Expiry Date	
Aggrements By Expiry Date Preferences	Home
Max Rows: 5 -	
Sort:	
From Date(Expiry Date):	
To Date(Expiry Date):	
Submit	

### 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

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

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 Sci
---

ile Edit View Help										powered by	SIEBEL
	ccounts Conta	cts Activities	Calendar Q	uotes Forecast	s Revenues	Compensation	Employees	Products In	fo Center Tr		riefi 🔍 🕟
ow: My Agreements		listory:→← →	₫.						: All Valid Agre		•
Agreement:			-								
reements	No Records										3
eement # 🚔 Name 🚔	Туре 🚔	Status 🚔	Account 🚔	Last Name	👙 🛛 First Name	e $\Leftrightarrow$ Valid $\Leftrightarrow$					
		inancials 🎽 Line	item Revenue	Activity Plans	Activities Atta	achments Ì Doc	uments 🎽 App	roval History 🎽	Primary Conta	acts Terr	
New Query	No Records		item Revenue			achments ¥ Doc	uments 🎽 App		Primary Conta	acts Ť Terr	ns 🔇 D T
■ New Query   ●	No Records	inancials	Item Revenue		Activities Atta	achments Doc	uments   App	roval History	Primary Conta	acts ) Terr	
∎▼   (New) Query   ( ] reement #	No Records					2	uments Ť App		Primary Conta	961	
reement #	No Records	Type: Status:			Team: Approver:		uments 🎽 App	Effective:	Primary Conta		
	No Records	Туре:			Team:	2	uments 🎽 App	Effective:	Primary Conta	961	

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.

File Edit View He	dip						U	covered by SIEDE
Home Opportun	ities Accounts	Contacts Acti	vities Calendar	Quotes Forecasts	Revenues C	Compensation En	nployees Product	s 🛛 Info Cer
how: My Agreements	~	History:₊∢	⊨⇒∣≝			Quer	ies: All Valid Agreeme	ents 💌
Agreement:								
greements								
IV New Query	< 💽 1-1 of	1						e
jreement # 🔶 Name :	🚔 🛛 Type 🚔	Status	⊖ Account	😄 🛛 Last Name	🔶 🛛 First Name	$\ominus$ Valid $\ominus$		
92937 1-1ZPL	Service I	evel Agree Current	Oracle	Aceman	Mark	· · ·		
More Info Line	e Items ČEntitleme	nts TFinancials	Line Item Reven		Activities ¥ Attac	chments Ť Docume		ory Y Prim 🕘
⊒▼   (New) (Query) greement #		nts Ì Financials *Type:		Team:		Effect	live:	G
⊒▼   (New) (Query) greement #					Activities ¥ Attac	Effect		
		*Туре:	eement 💌	Team:	Ŀ	Effect 2/6/2 Start:	tive: 004 12:00:00 AM	9
greement # 1-92937 Name:		*Type: Service Level Agr		Team: SADMIN		Effect 2/6/2 Start:	tive: 004 12:00:00 AM	G
I New Query Igreement # 1-92937 Name: 1-12PL Iccount:	( ) 1 of 1	*Type: Service Level Agr *Status:	eement 💌	Team: SADMIN	Ŀ	Effect 2/6/2 Start: 2/6/2 End:	tive: 004 12:00:00 AM : 004 12:00:00 AM	8
Carl New Query Agreement # 1-92937 Name: 1-1ZPL Account:		*Type: Service Level Agr *Status: Current	eement 💌	Team: SADMIN Approver:	Ŀ	Effect 2/6/2 Start: 2/6/2 End:	tive: 004 12:00:00 AM	9
	( ) 1 of 1	*Type: Service Level Agr *Status: Current Last Hame:	eement 💌	Team: SADMIN Approver: Revision:	Ŀ	Effect 2/6/2 Start: 2/6/2 End:	tive: 004 12:00:00 AM 004 12:00:00 AM 2004 5:50:35 PM	8

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

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:

									Edit Prefe	rences
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 150×L System	InMotion 150XL	IM-150	1	DELL222			
1-103121			Packaged Product	Package	SEBLRSVLP1	1	DELL111			
1-103117 《 1 -	5 of 9	>	Nokia 5190 Sleek	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

All Assets By Account	G 🗖
All Assests By Account Preferences	Home
Max Rows:	5 💌
Customer Id:	9
Sort:	
	Save Preferences

#### 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

All Assets By Account			6-
		Home	Back
Manual Search - Enter Account Name or Expression, then click "Search": Show All Account Id :  * Search	A         B         C         D         F         G         H         I         J         K         L         M           Accounts         N         O         P         Q         R         T         U         W         X         Y         Z         1         2         3         4         5         6         7         8         9         0		
	Accounts*: FinalTest2  Submit		

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

									Edit Prefe	rence
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 150×L	IM-150	1	DELL222			
1-103121			Packaged Product	Package	SEBLRSVLP1	1	DELL111			
1-103117	5 of 9 🌡	\$	Nokia 5190 Sleek	Nokia 5190	Nokia 5190	1	DELL111			

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

File Edit	View Help											<u></u>	wared by SIE	usiness .
▶ Home	Opportunities	Accounts C	Contacts	Activities	s Calendar	Quotes	Forecasts	Revenues	Compens	ation Emp	ployees	Products	Info Cer	
how: All Ass	ets	~	History:		<u></u>						Queries:	All Assets	~	11
set:														
ssets														
	Query)	D 1 - 1 of 1												<b>(7)</b>
sset # 🚔	Serial # 🚔	Asset Des	scriptior	Product 🔶	Part #	<del>\</del>	Installed $\Leftrightarrow$	Status 😂						
38411	SN1-38411	Customer N					6/10/2004	Production						_
	341-30411	Customer	Note	Customer Not	te SEBLR	SVNP1	010/2004	Production						
More	Info ) Service )	Activities ¥ W						ransactions		Attachmer	nts Čha	nge Reques	sts Rela	
More	Info ) Service )									Attachmer	ntsŤCha	nge Reques	sts ¥ Rela	D
More (New Isset #	Info ) Service )	Activities W 1 of 1 S	/arranty erial #	Value f		Charts ∬ Co	omponents ) 1 Asset Descript	ransactions		Attachmer		nge Reques		
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More  More  New Asset #  1-38411  Product:	Info j Service j ) Query   (	Activities W 1 of 1 S R B	/arranty erial #	Value f	Readings 🎽 (	Charts ¥ Co	omponents ) 1 Asset Descript	ransactions	Notes		ship:	nge Reques	•	
	Info Šervice Š	Activities W 1 of 1 S R R	farranty erial # SN1-3841	Value f		Charts Č Co	omponents 1 Asset Descript Customer Note	ransactions		0wner	ship: :	nge Reques		

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

									Edit P	reference
Action	Last Name	First Name	Street Address	City	State	Country	Postal Code	Work Phone #	Email Address	Account
L	Adam	Brian	1660, New Avenue	LosAngles	CA			7654566547	adam@dell222.com	DELL222
1	Lisa	Rusewelt	33, Watson Road	SanDiego	CA	USA	45321	7862123456	lisa@dell222.com	DELL222
1	Ruiza	Wnsent	0001, New Avenue	LosAngles	CA			6758765644	ruiza@dell222.com	DELL222
1	Sam	Luisa	0001, New Avenue	LosAngles	CA			6754508976	sam@dell222.com	DELL222

The above displayed screen can be divided into two parts:

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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

Contacts By Account		6-
Contact By Account Preferences		Home
Max Rows:	5 💌	
Last Name:		
First Name:		
Account Id:	1-23UL	
	Save Preferences	

#### 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

									Edit P	references
Action	Last Name	First Name	Street Address	City	State	Country	Postal Code	Work Phone #	Email Address	Account
1	Adam	Brian	1660, New Avenue	LosAngles	CA			7654566547	adam@dell222.com	DELL222
1	Lisa	Rusewelt	33, Watson Road	SanDiego	CA	USA	45321	7862123456	lisa@dell222.com	DELL222
1	Ruiza	Wnsent	0001, New Avenue	LosAngles	CA			6758765644	ruiza@dell222.com	DELL222
1	Sam	Luisa	0001. New Avenue	LosAnales	CA			6754508976	sam@dell222.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

	'iew Help								powered by SIEE	
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ow: All Contac	cts	Histor	ry:+(+ →   🎿				Que	eries: All Conta	ncts 🗾	
tact:										
ontacts										
IV New	Query)	) 1-1 of 1								Ð
llew $\Leftrightarrow$	Last Name 🌧	First Name $\stackrel{ riangle}{\bigtriangledown}$	Middle Name $\stackrel{ riangle}{\Rightarrow}$	Mr/Ms 🔤	Work Phone # 🚔	Job Title $\Leftrightarrow$	Email 🚔	Account $\Leftrightarrow$	Site $\Leftrightarrow$	Þ
	Aceman	Mark		Mr.	(817) 218-3196	System Manager	macerma@kmart.co	Oracle	SanFransisc	:0
More In	fo Accounts	Activities Campa	aigns <sup>1</sup> Campaign	s - Manager 🏹	Notes <sup>Y</sup> Opportunitie	es Î Profile Î Re	sponses <sup>V</sup> Respon	ises - Manager	r <sup>*</sup> Service F	
-		Activities T Campa	aigns 🎽 Campaign	s - Manager 🍸 I	Notes 🎽 Opportunitie	es Ť Profile Ť Re	sponses 🎽 Respon	nses - Manager		
				s - Manager 🏹 I	Notes Y Opportunitie Mr Ms:	es Ť Profile Ť Re	sponses Ť Respon Account:	nses - Manager		
ast Name:		Ď 1 of 1	ione #:	s - Manager 🎽 i		ss Ť Profile Ť Re ▼		ises - Manager		Ð
		1 of 1     Work Ph     (817) 21     Address	ione # 8-3196 s Line 1:		Mr/Ms: Mr. City:		Account: Oracle Site:			
ast Name: .cernan		D 1 of 1 Work Ph (817) 21 Address (1857, Ne	ione # 8-3196 s Line 1: sw Avenue	s - Manager 🎽 I	Mr/Ms: Mr. City: San Fransisco		Account: Oracle Site: SanFransi			
ast Name: ceman irst Name: ark		1 of 1     Work Ph     (817) 21     Address	ione # 8-3196 s Line 1: sw Avenue		Mr/Ms: Mr. City: San Fransisco State:	-	Account: Oracle Site: SanFransi Email:	\$C0		
ast Name: .ceman irst Name:		D 1 of 1 Work Ph (817) 21 Address (1857, Ne	ione # 8-3196 s Line 1: sw Avenue		Mr/Ms: Mr. City: San Fransisco		Account: Oracle Site: SanFransi Email:	sco @kmart.co.in		

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

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# 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

									Edit P	references
Action	Last Name	First Name	Street Address	City	State	Country	Postal Code	Work Phone #	Email Address	Account
L	Adam	Brian	1660, New Avenue	LosAngles	CA			7654566547	adam@dell222.com	DELL222
1	Lisa	Rusewelt	33, Watson Road	SanDiego	CA	USA	45321	7862123456	lisa@dell222.com	DELL222
1	Ruiza	Wnsent	0001, New Avenue	LosAngles	CA			6758765644	ruiza@dell222.com	DELL222
1	Sam	Luisa	0001, New Avenue	LosAnales	CA			6754508976	sam@dell222.com	DELL222

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

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

Contacts By Account	6
Update Contact Details	Home
Last Name:	Adam
First Name:	Brian
Street Address*:	1660, New Avenue
City*:	LosAngles
State:	CA
Country:	
Postal Code:	
Work Phone:	7654566547
Email Address:	adam@dell222.com
	Update

# 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

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

The above displayed screen can be divided into two parts:

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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

Customer List With Address Info	<b>B</b>	
Customerlist Preferences	Hom	e
Max R		
	Save Preferences	

#### 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

					Edit Preference
Action	Name	Street Address	City	State	Postal Code
1	BEA1	42 James Street	Capitana	CA	234567
2	DELL111	14 James Street	Moulin	CA	3456789
L	DELL222	111 Maruti Sadan	Hyderabad	CA	345674
1	DELL333	13,Down Street	New Jersy	NY	567894
1	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

Customer List With Address Info	6 - C
Update Customer Address Details	Home
Customer Name:	BEA1
Street Address:	42 James Street
City:	Capitana
State:	CA
Postal Code:	234567
	Update

#### **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

50

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

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	G
Repair Status Preferences	Home
Max Rows: Repair #:	5  Save Preferences

#### 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

					Edit Prefere
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

RMA Order Status	6 -
RMA Order Status Preferences	Home
Max Rows: 5  Order #:	
SavePreferences	

# 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		

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:

Home	Opportunities	Iccounts Contac	cts Activities	Calendar Quot	tes Forecasts Re	evenues Con	pensation Emplo	yees Products	Info Cer 🔘
iow: My Serv	ice Orders	~	History: 🗲 🖛	) 🔬			Que	eries: All Orders thi	is Week 🔽
er #:									
ervice Orde	ers								
⊒▼) (New)	Query) (Fulfill 7	D 1-1	of 1						e
State	Order # 🚔	Туре 🚔	Status $\stackrel{ riangle}{\bigtriangledown}$	Priority $\stackrel{ riangle}{\bigtriangledown}$	Order Date 🚔	Account 🚔	Last Name $\Leftrightarrow$	First llame $\doteqdot$	
	1-142401	RMA Return	Open	Medium	8/20/2004 2:41:14 /	Oracle	Brad	Joseph	
More	Info 1 ine Items	Torms Dawn	ant Attachmont	te Charte					
	Info ¥ Line Items	Terms Payme	ent Attachment	ts Charts					()
IT New				ts Charts	Team:		Descripti	ion:	
∃▼ New )rder #:		Ď 1 of 1	'n	ts Charts	Team: SADMIN		Descripti	ion:	
• New • New • New • New • New • New • New		1 of 1     Priority     Medium     *Status	r: 1		SADMIN Organization:		Descripti	ion:	
Trder # 142401 ype:		1 of 1     Priority     Medium	r: 1		SADMIN		Descript		
IV New Arder # 142401 Ype: MA Return		1 of 1 Priority Medium *Status Open Last Ha	r: n s:	<b>.</b>	SADMIN Organization: Default Organization *Currency:	n 🖬			
Drder # -142401 ype: MA Return count:		1 of 1 Priority Medium Status Open Last Ha Brad	/: n s: ime:		SADMIN Organization: Default Organization *Currency: USD				6
More (New) Order # 1-142401 Type: RMA Return (scount: Oracle ite:		1 of 1 Priority Medium *Status Open Last Ha	/: n s: ime:	<b>.</b>	SADMIN Organization: Default Organization *Currency:	n B	Opportu		6

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

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	68 WebLogic Portlets for Siebel – RMA Order Status	– Account Siebel Screen
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	Oracle	SanFransisco	(412) 230-9089			Active	www.oracle.com	
			ents   Contacts	ESP Notes	Opportunities P	rofile Revenues	Service Profile Service Request	
	fo Activities	Assets Attachme	ents Contacts	ESP Notes	Opportunities <sup>Y</sup> Pi	rofile   Revenues	Service Profile Service Request	
Iame:		D 1 of 1	ents ) Contacts ) Volume:		Account Type:		Partner:	
💽 New Name:		D 1 of 1 Current	Volume:	ESP Notes (	Account Type: Customer	rofile   Revenues 	Partner:	IS ACC 🕢 D
Iame: Dracle te:		D 1 of 1 Current			Account Type: Customer Status:		Partner:	
Ilame: Dracle Ite: SanFransisco		D 1 of 1 Current Potentia	Volume: I Volume:		Account Type: Customer Status: Active		Partner:	
Iame: Dracle te: SanFransisco Iain Phone #		1 of 1     Current     Potentia     Account	Volume: I Volume: Team:		Account Type: Customer Status:	<b>.</b>	Partner: Competitor: Reference:	
		D 1 of 1 Current Potentia	Volume: I Volume: Team:		Account Type: Customer Status: Active		Partner:	

54

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

WebLogic Portlets for Siebel User Guide