Customer Online Self-Service Portal

The Customer Online portal lets you give your customers anytime access to information about their accounts. Via SouthWare NetLink your customers can inquire status and perform selected functions such as creating new orders, requesting service, and paying bills - 24 hours a day, 7 days a week.

The portal is designed as a fully-functioning starting point for your customer self-service experience. Since it uses NetLink templates you may easily customize this to change the style/look or features.

Access to Portal

To access this portal you must call the request WIOLCUSTMAIN along with valid customer login information (reqr_type=C, reqr_id=name, auth_id=password).

Key Components

Here are the key components of this portal:

Start Tab

The Start tab shows account info including the status of orders and any unpaid balance. The tab also shows a Recent Activity report that uses the special RM20 customer reporting file.

(This tab is included in the wiolcuststart.htm template)

Place an Order Tab

This tab access the standard NetLink shopping cart page (request ID of WISHOPMAIN). This allows the customer to access previous shopping carts or create an order while still having access to the other tabs.

Open Orders Tab

This tab lists any open orders for the customer (request ID of WIOLCORD). You may zoom to the details of an order (request ID of WIOLCORDVIEW).

Recent Shipments Tab

This tab lists box information for recent orders (request ID of WIOLCBOX). The list automatically includes boxes for the last 30 days, and there are one-click options for last 90 days or for all box history.

To the right of the box displays a preview of more information for the currently highlighted box. If you use the optional box info feature then the items contained in each box will be displayed below the box info.

Order History Tab

This tab lists recent invoices for the customer (request ID of WIOLCUSTINVLST). You have links to display the last 7 days, last 30 days, last 90 days, last year, and all history. For each invoice you may zoom to the details (request ID of WIOLCUSTINVVIEW).

Unpaid Invoices Tab

This tab shows any unpaid open items from Accounts Receivable (request ID of WIOLCUSTDUE). The list includes only invoice items that have a Pending Balance (net of any unposted cash receipts) that is greater than zero. The preview pane to the right shows any payment history for the item.

If you have set up NetLink to accept credit card payments (via PC Charge or Element) then this tab becomes a bill payment portal:

- **An open item customer** may select individual items (and amounts) to pay, then make a single credit card payment to pay all the selected items. There is also an option to make a lump-sum payment that is automatically applied to the oldest items.
- **A balance forward customer** may make a payment on account that will be applied to the oldest invoices.

Service Orders Tab
This tab (request ID of WIOLCUSTSOLST) shows any open service calls for the customer. The tab also allows the customer to create a new service call by entering contract (and optional equipment), name, phone, and description of the request.

Account Info Tab
This tab (request ID of WIOLCUSTACCT) shows basic contact info for the customer's account and lets them edit the info.

Set Up Notes

After you install this portal here are some set up issues to consider:

Built-In Variability - The portal uses variables and conditional logic to automatically modify the following features:

- Credit Card Payments
  - If you have set up NetLink to process credit cards through PC Charge then the bill payment and order payment features will accept credit card info
  - If you have set up NetLink to process credit cards through Element (out of scope processing) then bill payment and order payment will use Element to accept credit card info
  - If you have not set up NetLink for credit card payments then bill payment is not allowed and order payment must be On Account.
- Access to Order Entry Features
  - The "Place an Order" tab will not appear if you are not using the NetLink shopping cart feature.
- Access to Order Info
  - The "Open Orders" and "Order History" tabs will not appear if you do not use the SouthWare Order Entry module.
- Access to Shipping Info
  - The "Recent Shipments" tab will not appear if you do not use the SouthWare Shipping Interface module.
- Access to Service Order Features
  - The "Service Orders" tab will not appear if you do not use the SouthWare Service Orders module.
- "My*company* Account" Literal
  - The toolbar line above the tabs references the customer's account number as a "Myxxxxxx Account" where xxxxxx is the first word of your company name (as defined in XX-03-01. For example, a company with the name "Acme Industries, Inc." would display "MyAcme Account" in the toolbar. You may modify or remove this literal if this is not desirable in your situation.

Message Area

There is a scrolling message area at the upper right of the portal. This is designed to contain messages that you want your customers to see when they access this portal. You will need to modify this area to contain messages appropriate for your company/customers. Or you can simply remove or replace this area with another header.

The message area is contained in the html template “wiolcustmain.htm”. Search for the text “EDIT SCROLLER CONTENTS HERE”. There are three sample messages (scrollercontent[n] where “[n]” is 0,1,2,3 etc.) that you may replace, and you may add additional messages as you wish.