

Portal Information & Form Page Configuration

This worksheet will guide you in thinking through all the details you'll need to set up a Customer Portal. It will help you organize the information as you are preparing to add it into your Springboard. This document covers:

- Portal information
- Portal form page configuration
- Document library/catalog configuration
- Portal configuration
- Configuration of users and groups

Portal Information

Customer name/title of portal: _____

Clone from our company portal template? No Yes

Clone from another established portal? No Yes

If yes, which one? _____

Customer logo: No Yes

New username and password: _____

New catalog description/title: _____
(Items will be added later.)

New proof category description: _____

Portal Form Page Configuration

Do specific representatives or departments need to receive an email notification from this portal? No Yes

If yes, which forms? Provide email addresses for each:

Document Library Catalog Orders _____

Estimates _____

New Orders _____
(Orders for items not yet in catalog)

Send Files _____

Online Payments _____

Order Approval _____

Proofs _____

ITEMS TO CONSIDER

Do you have a customer logo to display in the portal? Prepare it as a JPEG, GIF or PNG 150–250 pixels max width.

See Password Requirements in the sidebar on page 4 for detailed information about setting up passwords for your users.

By default, notification email messages are sent to the email address displaying in the footer of the pages of your website. This email address can be updated in the Locations & Hours section of your Springboard.

Document Library/Catalog Configuration

If different than the standard template.

Display Settings

Catalog display: Express Order Gallery

If Gallery, which catalog item detail page layout?

Default Custom *(Provide details below.)*

No Yes Use our standard template *(If No, provide details below.)*

No Yes Display cart link

No Yes Display item search form

No Yes Display item number

No Yes Display thumbnail

No Yes Display inventory

No Yes Display unit price

No Yes Display pricing grid

No Yes Display pricing grid with subtotals

No Yes Display ordering quantity field

Checkout Configuration

Portal will use Standard catalog checkout E-commerce checkout

(If using e-commerce checkout, to display FedEx or UPS options, and/or a custom carrier by weight, gather weight per piece. If using e-commerce checkout with basic tax setting, indicate whether customer should be charged sales tax, and if so, at what rate.)

What is the tax rate for this customer? _____

Receive credit card payment at checkout? No Yes

Catalogs

Add our sales campaign catalog to this portal? No Yes

Is order approval required on any catalog items? No Yes

Will we need to organize documents into separate catalogs?

No Yes

If yes, list details: _____

ITEMS TO CONSIDER

When using the Gallery display, the catalog item detail page is the page that displays when the user clicks on the thumbnail image. You can create different layouts that display the appropriate details and labels.

Both checkout options allow you to accept credit cards using a payment gateway. E-commerce checkout allows you to provide real-time shipping rates and calculate tax based on the location of your customer.

The order approval requirement is set at the catalog level. This means that if you have some items that require approval and others that do not, the items need to be separated into different catalogs.

Note any specific way to name the catalog items (documents): _____

Display pricing? No Yes *(If yes, gather a price breakdown per document.)*

Catalog Item Images

Display thumbnail image for each catalog item? No Yes

Provide preview image of catalog item? No Yes

Provide preview file (JPEG, PNG, GIF or low-res PDF)? No Yes

Inventory

Do any items use inventory tracking? No Yes

If yes, gather a list of items and define the following for each item:

Available inventory _____ Minimum inventory _____

Should item inventory be tracked automatically? No Yes

Should orders be restricted to available inventory? No Yes

Configure Catalog

Inventory tracking: Who should receive the low inventory email notification? Email addresses: _____

Shipping: If using e-commerce checkout to display FedEx or UPS shipping options, and/or a custom carrier by weight, provide weight per piece.

Portal Configuration

Does the content of the portal need to be encrypted for paying with a credit card? No Yes

Use the default design layout? No Yes

If no, which one? _____

ITEMS TO CONSIDER

When using the Gallery display, you can display up to three different images.

- **Thumbnail:** JPEG, GIF or PNG. Size at 125 pixels wide. If your image is larger it will be forced down to the display size of 125 pixels.
- **Preview Image:** JPEG, GIF or PNG, which displays on the Item Details page when using the Gallery display for the catalog. If you do not upload a preview image, the thumbnail image (at its full size) is automatically used. Recommended size is 250-300 pixels.
- **Preview File:** Can be a web image or PDF, at whatever dimensions you choose. With the Gallery display, using JPEG, GIF or PNG for the preview file gives a nifty lightbox display of the image. A PDF or any format used with the Express Order display will open in the browser window or in a new tab. When using the Express Order display, if you do not upload a preview file, the thumbnail image (at its full size) is automatically used.

Configuration of Users and Groups

Do we need to establish Groups for this portal? No Yes

If yes, list groups and permissions: _____

New Users for This Portal

Please list complete name, username and password information below.

(Note: Excel file may be imported with established usernames/passwords to establish access permissions.)

Username	Password	Name	Email	Group Assignment
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Is there a need for auto logins? No Yes

Are there additional pages needed, other than what is in the company template? No Yes

If yes, please describe and provide a list of who should have access.

USERS AND GROUPS

A group is a group of users with the same permissions. A user can belong to more than one group. Once a group has access to a portal, adding a user and assigning them to the group immediately gives them access to the portal. For more details about users and groups, visit the Support pages of your Springboard, Click to Get Answers Now and Search for: users and groups.

PASSWORD REQUIREMENTS

Remember the following rules regarding passwords:

- Must not be the same as the username
- Must contain at least 1 number and 1 letter
- Contain a minimum of 6 characters
- Are case sensitive
- Can contain special characters such as !@#%*^*.