



Portrait Dialogue

Customer Web Access Configuration

Release 6.0 SP1

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About Portrait Software

Portrait Software is now part of [Pitney Bowes Business Insight \(PBBI\)](#).

Portrait Software enables organizations to engage with each of their customers as individuals, resulting in improved customer profitability, increased retention, reduced risk, and outstanding customer experiences. This is achieved through a suite of innovative, insight-driven applications which empower organizations to create enduring one-to-one relationships with their customers.

Portrait Software was acquired in July 2010 by Pitney Bowes to build on the broad range of capabilities at Pitney Bowes Business Insight for helping organizations acquire, serve and grow their customer relationships more effectively. The Portrait Customer Interaction Suite combines world leading customer analytics, powerful inbound and outbound campaign management, and best-in-class business process integration to deliver real-time customer interactions that communicate precisely the right message through the right channel, at the right time.

Our 300 + customers include industry-leading organizations in customer-intensive sectors. They include 3, AAA, Bank of Tokyo Mitsubishi, Dell, Fiserv Bank Solutions, Lloyds Banking Group, Merrill Lynch, Nationwide Building Society, RACQ, RAC WA, Telenor, Tesco Bank, T-Mobile, Tryg and US Bank.

Pitney Bowes Business Insight (PBBI) is a division of Pitney Bowes Inc. (NYSE: PBI).

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About this document

An overview of how to configure Customer Web Access.

Related documentation

Portrait Dialogue 6.0 SP1 release notes: available on the installation CD.

Software release

Portrait Dialogue 6.0 SP1

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1 Customer Web Access and profile settings

The login pages and My Profile can be configured using profile settings. Profile settings are defined in an XML file. You can in a profile setting can be used to **specify the page's texts, style and forgotten password options**.

Profile settings are mainly used to configure the login pages of My Profile and questionnaires.

1.1 Profile configuration and My Profile

1.1.1 Assigning profiles to My Profile

My Profile is assigned profile settings using the following rules:

1. First the URL is checked to see if it contains a profile ID.
2. If no profile ID is found in the URL, then all profiles are checked to see if one of them has a CWP_Instance and a CWP_CD_ID, which matches the instance and domain ID specified in the URL.
3. If no match is found, then no profile is used.

1.1.2 My Profile styles

My Profile can be assigned a style by adding the CWP_Default_Style_ID parameter to the profile used. The ID must belong to a style created in Visual Dialogue's **Questionnaire Style designer, but the style is a bit different from a questionnaire's style:**

- The style's CSS classes section should be empty.
- The CSS classes defining the customer pages should instead be included in the header section of the HTML template. The CSS classes to use can be found in Login.css and Profile.css (located in the Configuration/CSS folder). All classes from both files must be included.

An example of a style designed to be used with My Profile can be found at the end of this document.

1.2 Questionnaires and profile settings

When used in combination with questionnaires then profile settings only apply to the login page. Profiles are, when used in this context, mainly used to change the **login page's texts** and to specify forgotten password retrieval.

The profile parameter for specifying a style (CWP_Default_Style_ID) is ignored when used with questionnaire pages. The questionnaires definition might specify a style. If it does then the style is used on the login page.

Assigning profiles to questionnaire pages

The login page is assigned a profile using the following rules:

1. First the URL is checked to see if it contains a profile ID.

2. If no profile ID is found in the URL, then all profiles are checked to see if one of them has a CWP_Questionnaire_Layout_ID which matches the questionnaires layout ID.
3. If no match is found, then no profile is used.

1.3 Forgotten passwords

A login page can be given send forgotten password functionality.

To enable:

- CWP_Enable_Forgotten_Password must be true and one or more Forgotten_Password_Channel sections must be added to the profile (see example under the Configuring profiles section later in the document for how this can be done).
- A message template containing username and password must exist in Visual Dialogue.

1.4 Configuring profiles

All profile definitions are located in ProfileSettings.xml, which can be found in the Configuration/XML folder.

If no values are specified for the optional fields then their default values are used.

CWP_ID	Required	The login profile's ID. Used when specifying the profile to use in the URL
CWP_Instance	Optional	<i>Only valid for customer profile related pages.</i> The instance the login profile applies to. Only used when no profile ID is specified in the URL
CWP_CD_ID	Optional	<i>Only valid for customer profile related pages.</i> The domain ID the profile applies to. Only used when no profile ID is specified in the URL
CWP_Questionnaire_Layout_ID	Optional	<i>Only valid for questionnaire related pages.</i> Can be used to indicate that the profile should be used for questionnaires using the layout with the specified ID (this is only used if no profile ID is specified in the URL). Multiple layout IDs can be specified by using a comma separated list.
CWP_Default_Style_ID	Optional	<i>Only valid for customer profile related pages.</i> The ID of the style to use. These styles are the same as the questionnaire styles in Visual Dialogue.
CWP_Language	Optional	<i>Only valid for customer profile related pages.</i> The language to use on the pages.
CWP_Enable_Forgotten_Password	Required	If the login page should have the option of sending forgotten passwords to the user.
CWP_Remote_User_ID_Field_Name	Optional	The name of the field containing the username when remote login is used.
CWP_Remote_Password_Field_Name	Optional	The name of the field containing the password when remote login is used.
CWP_Login_Header	Optional	The login page's header text

CWP_Login_Instructions	Optional	The login page's instructions
CWP_Login_Username_Label	Optional	The login page's text for the username label
CWP_Login_Username_ToolTip	Optional	The text shown when holding the mouse cursor over the username label
CWP_Login_Password_Label	Optional	The login page's text for the password label
CWP_Login_Password_ToolTip	Optional	The text shown when holding the mouse cursor over the password label
CWP_Login_Button_Text	Optional	The login page's text for the logon button
CWP_Login_Button_ToolTip	Optional	The text shown when holding the mouse cursor over the logon button
CWP_Login_UserName_Missing_Text	Optional	The text shown when the user clicks the logon button without entering a username. Use <i>[field]</i> if you want to include the name of the required field in the error message. This is then exchanged with the appropriate field name
CWP_Login_Password_Missing_Text	Optional	The text shown when the user clicks the logon button without entering a password. Use <i>[field]</i> if you want to include the name of the required field in the error message. This is then exchanged with the appropriate field name
CWP_Login_Goto_Send_Password_Link_Label	Optional	The send forgotten password link's text. Only valid if CWP_Enable_Forgotten_Password = true
CWP_Login_Goto_Send_Password_Link_ToolTip	Optional	The text shown when holding the mouse cursor over the forgotten password link. Only valid if CWP_Enable_Forgotten_Password = true
CWP_Login_Forgotten_Password_Header	Optional	The send forgotten password page's header text. Only valid if CWP_Enable_Forgotten_Password = true
CWP_Login_Forgotten_Password_Instructions	Optional	The send forgotten password page's instructions. Only valid if CWP_Enable_Forgotten_Password = true
CWP_Login_Go_Back_Login_Link_Label	Optional	The Return to login page link's text. Only valid if CWP_Enable_Forgotten_Password = true
CWP_Login_Go_Back_Login_Link_ToolTip	Optional	The text shown when holding the mouse cursor over the return to login page link. Only valid if CWP_Enable_Forgotten_Password = true
CWP_Login_Login_Error	Optional	The text shown in case of a failed logon attempt.

1.4.1 Forgotten password channels

If CWP_Enable_Forgotten_Password = true then one or more forgotten password channels must be specified.

CWFPC_Doamin_Field	Required	The domain field used for finding the correct customer and sending him his username and password. The name of the domain field can be found in Dialogue Admin. The field used is normally an email or a mobile field. The field should have unique values. If two customers are registered with the same value then an error will be shown when an user tries to
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		retrieve his forgotten password.
CWFPC_Display_Name	Optional	The text describing the domain field.
CWFPC_Message_Template_ID	Required	The ID of the message template used to send the forgotten password
CWFPC_Send_Error_Message	Required	The error message shown when no customer was found matching the entered value. This error message is also shown when more then two customers have the same value in the domain field.
CWFPC_Send_Success_Message	Required	The message shown when the username and password has been sent.
CWFPC_Button_Text	Optional	The send forgotten password button's text
CWFPC_Button_ToolTip	Optional	The text shown when holding the mouse cursor over the send forgotten password button.
CWFPC_IsRequired_Error_Message	Required	The error message shown when the user clicks the send forgotten password button without entering a value.
CWFPC_Regular_Expression	Optional	A regular expression to check the entered value.
CWFPC_Regular_Expression_Error_Message	Optional	The error message shown when the entered text do no conform to the regular expression.

1.4.2 Example

```
<?xml version="1.0" encoding="utf-8"?>
<ProfileSettings xmlns="http://tempuri.org/ProfileSettings.xsd">
  <Profile>
    <CWP_ID>1</CWP_ID>
    <CWP_Instance>MSSQL_UTV431</CWP_Instance>
    <CWP_CD_ID>1001</CWP_CD_ID>
    <CWP_Questionnaire_Layout_ID>1029</CWP_Questionnaire_Layout_ID>
    <CWP_Default_Style_ID></CWP_Default_Style_ID>
    <CWP_Language>nb-no</CWP_Language>
    <CWP_Enable_Forgotten_Password>true</CWP_Enable_Forgotten_Password>
    <CWP_Remote_User_ID_Field_Name>txtUserName</CWP_Remote_User_ID_Field_Name>
    <CWP_Remote_Password_Field_Name>txtPassword</CWP_Remote_Password_Field_Name>
    <CWP_Login_Header>Welcome to Million Handshakes' customer portal</CWP_Login_Header>
    <CWP_Login_Instructions>Please enter your username and password.</CWP_Login_Instructions>
    <CWP_Login_Username_Label>User ID</CWP_Login_Username_Label>
    <CWP_Login_Username_ToolTip>Please enter your user ID</CWP_Login_Username_ToolTip>
    <CWP_Login_Password_Label>Password</CWP_Login_Password_Label>
    <CWP_Login_Password_ToolTip>Please enter your password</CWP_Login_Password_ToolTip>
    <CWP_Login_Button_Text>Log on</CWP_Login_Button_Text>
    <CWP_Login_Button_ToolTip>Click to log on</CWP_Login_Button_ToolTip>
    <CWP_Login_UserName_Missing_Text>Please enter your user ID</CWP_Login_UserName_Missing_Text>
    <CWP_Login_Password_Missing_Text>Please enter your password</CWP_Login_Password_Missing_Text>
    <CWP_Login_Goto_Send_Password_Link_Label>Click here if you have forgotten your password
    </CWP_Login_Goto_Send_Password_Link_Label>
    <CWP_Login_Goto_Send_Password_Link_ToolTip>Forgotten
password?</CWP_Login_Goto_Send_Password_Link_ToolTip>
    <CWP_Login_Forgotten_Password_Header>Send forgotten password</CWP_Login_Forgotten_Password_Header>
    <CWP_Login_Forgotten_Password_Instructions>
      Please enter your e-mail or mobile phone number and we will send you your username and password.
    </CWP_Login_Forgotten_Password_Instructions>
    <CWP_Login_Go_Back_Login_Link_Label>Back to login</CWP_Login_Go_Back_Login_Link_Label>
    <CWP_Login_Go_Back_Login_Link_ToolTip>Click here to return to the login page
```

```

</CWP_Login_Go_Back_Login_Link_ToolTip>
<CWP_Login_Login_Error>Wrong username or password. Please check your spelling and try again.
</CWP_Login_Login_Error>
<Forgotten_Password_Channel>
  <CWFPFC_Doamin_Field>email</CWFPFC_Doamin_Field>
  <CWFPFC_Display_Name>E-mail address</CWFPFC_Display_Name>
  <CWFPFC_Message_Template_ID>1007</CWFPFC_Message_Template_ID>
  <CWFPFC_Send_Error_Message>
    No one is registerd with the entered e-mail address. Please check your spelling and try
again.
  </CWFPFC_Send_Error_Message>
  <CWFPFC_Send_Success_Message>Your username and password have been sent to you by email.
  </CWFPFC_Send_Success_Message>
  <CWFPFC_Button_Text>Send by e-mail</CWFPFC_Button_Text>
  <CWFPFC_Button_ToolTip>Click to send username and password by email</CWFPFC_Button_ToolTip>
  <CWFPFC_Regular_Expression>^\w-+(?:\.\w-+)*@(?:\w-+\.)+[a-zA-
Z]{2,7}$</CWFPFC_Regular_Expression>
  <CWFPFC_Regular_Expression_Error_Message>
    You have entered an invalid e-mail address. Please check your spelling and try again.
  </CWFPFC_Regular_Expression_Error_Message>
</Forgotten_Password_Channel>
<Forgotten_Password_Channel>
  <CWFPFC_Doamin_Field>cellular</CWFPFC_Doamin_Field>
  <CWFPFC_Display_Name>Mobile number</CWFPFC_Display_Name>
  <CWFPFC_Message_Template_ID>1011</CWFPFC_Message_Template_ID>
  <CWFPFC_Send_Error_Message>
    No one is registerd with the entered cell phone number. Please check the entered number
and try
    again.
  </CWFPFC_Send_Error_Message>
  <CWFPFC_Send_Success_Message>Your will soon receive a SMS with your username and password.
  </CWFPFC_Send_Success_Message>
  <CWFPFC_Button_Text>Send by SMS</CWFPFC_Button_Text>
  <CWFPFC_Button_ToolTip>Click to send username and password by SMS</CWFPFC_Button_ToolTip>
  <CWFPFC_IsRequired_Error_Message>Please enter your mobile phone
number</CWFPFC_IsRequired_Error_Message>
  <CWFPFC_Regular_Expression>^[0-9]{8,8}$</CWFPFC_Regular_Expression>
  <CWFPFC_Regular_Expression_Error_Message>
    Your mobile phone number is invalid. Please check the entered number and try again.
  </CWFPFC_Regular_Expression_Error_Message>
</Forgotten_Password_Channel>
</Profile>
</ProfileSettings>

```

1.5 Questionnaires in Iframe

To make questionnaires behave properly in when displayed in an Iframe in Internet Explorer, do the following in IIS on the web server:

1.5.1 IIS 6.0

- Bring up the properties window for the MHCwa web-application
- Select the HTTP headers tab
- Click Add and enter the following:
 Custom header name: P3P
 Custom header value: CP="NOI DSP COR NID CUR OUR NOR"
- Click Ok and exit IIS

1.5.2 IIS 7.0

- Select the MHCwa web-application in the tree view on the left
- Open HTTP Response Headers in the features view on the right
- Click Add and enter the following:
Custom header name: P3P
Custom header value: CP="NOI DSP COR NID CUR OUR NOR"
- Click Ok and exit IIS

