



## Web Channel - Application Functional Overview

Edition 2.1

10 January 2013





# Portrait Foundation Web Channel - Application Functional Overview

©2013

Copyright Portrait Software International Limited

All rights reserved. This document may contain confidential and proprietary information belonging to Portrait Software plc and/or its subsidiaries and associated companies.

Portrait Software, the Portrait Software logo, Portrait, Portrait Software's Portrait brand and Million Handshakes are the trademarks of Portrait Software International Limited and may not be used or exploited in any way without the prior express written authorization of Portrait Software International Limited.

## Acknowledgement of trademarks

Other product names, company names, marks, logos and symbols referenced herein may be the trademarks or registered trademarks of their registered owners.

## About Portrait Software

Portrait Software is now part of [Pitney Bowes Software Inc.](#)

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 Software 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 Software Inc. is a division of Pitney Bowes Inc. (NYSE: PBI).

For more information please visit: <http://www.pitneybowes.co.uk/software/>

### UK

Portrait Software  
The Smith Centre  
The Fairmile  
Henley-on-Thames  
Oxfordshire, RG9 6AB, UK

Email: [support@portraitsoftware.com](mailto:support@portraitsoftware.com)  
Tel: +44 (0)1491 416778  
Fax: +44 (0)1491 416601

### America

Portrait Software  
125 Summer Street  
16<sup>th</sup> Floor  
Boston, MA 02110  
USA

Email: [support@portraitsoftware.com](mailto:support@portraitsoftware.com)  
Tel: +1 617 457 5200  
Fax: +1 617 457 5299

### Norway

Portrait Software  
Portrait Million Handshakes AS  
Maridalsveien. 87  
0461 Oslo  
Norway

Email: [support@portraitsoftware.com](mailto:support@portraitsoftware.com)  
Tel: +47 22 38 91 00  
Fax: +47 23 40 94 99

# About this document

## Purpose of document

The purpose of the document is to provide a functional description of the Portrait Foundation Web Channel application.

## Intended audience

The intended audience is those concerned with the planning and initial studies for a project using Portrait Foundation.

## Related documents

Contact Centre Functional Overview

Agent Manager Functional Overview

## Software release

Portrait Foundation 3.1 or later.



# Contents

<b>1</b>	<b>Introduction</b>	<b>6</b>
<b>2</b>	<b>Starting the Portrait Web Channel</b>	<b>7</b>
<b>3</b>	<b>Site home page</b>	<b>8</b>
<b>4</b>	<b>Register yourself</b>	<b>9</b>
4.1	Personal details	9
4.2	Address details	9
4.3	Contact details	11
4.4	Security details	12
<b>5</b>	<b>Log on</b>	<b>14</b>
5.1	Customer home page	14
<b>6</b>	<b>Amend personal details</b>	<b>16</b>
6.1	Personal details	16
6.2	Employment details	16
<b>7</b>	<b>Log off</b>	<b>18</b>

# 1 Introduction

The Portrait Web Channel is a shell application, designed as a working example of how this channel might be used. In most cases, it is anticipated an implementation will already have a Web site or customised visual and navigation design, in which case the Portrait Web Channel will have to integrate into an existing Internet channel proposition and brand identity.

The Portrait Web Channel allows a user to register with the organisation that is providing the web site. Once registered, the user can log on to the web site and amend the personal details that the organisation holds for them. The following sections provide more detail on the functions provided by the Web Channel.

## 2 Starting the Portrait Web Channel

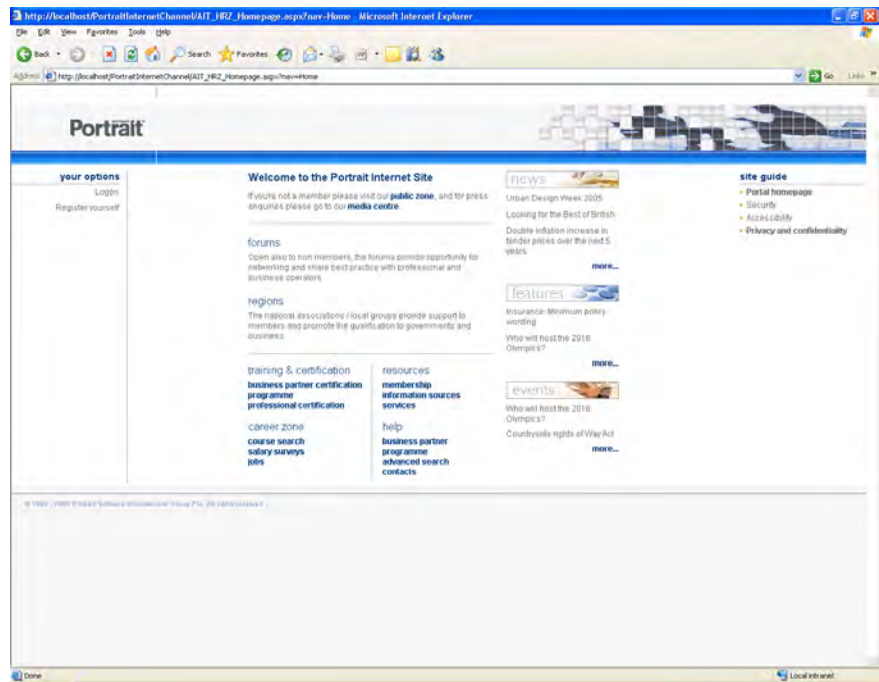
Enter the URL for the Portrait Web Channel in your browser:

**`http://<host>/PortraitInternetChannel/Index.aspx`**

where **<host>** is the name of the host machine on which the Portrait Web Channel is installed.

## 3 Site home page

Figure 1 - Site home page



The site home page split into different screen areas that are intended to provide the following content:

- **Your options** - presents the list of actions that a user can take. The content of this list changes dynamically, depending on the area of the web site that is currently being browsed. When a user browses to the home page for the first time, the following options are presented:
  - **Logon** allows a previously registered user to log on.
  - **Register yourself** activates an online registration page allowing the customer to enter specific details about themselves.
- **Main page** - shows the main content for the current page. On initially browsing to the Portrait Web Channel, a welcome message is displayed, plus **news**, **features** and **events** sections that provide information about the organisation providing the web site. Once registered or logged on, the **Customer home** page is displayed in this area.
- **Site guide** - provides links to easily navigate to other areas of the web site.
- **Header and footer areas** - these areas are intended to remain the same for each page within the web site. They are a suitable area to convey an organisation's branding, for example the company log.



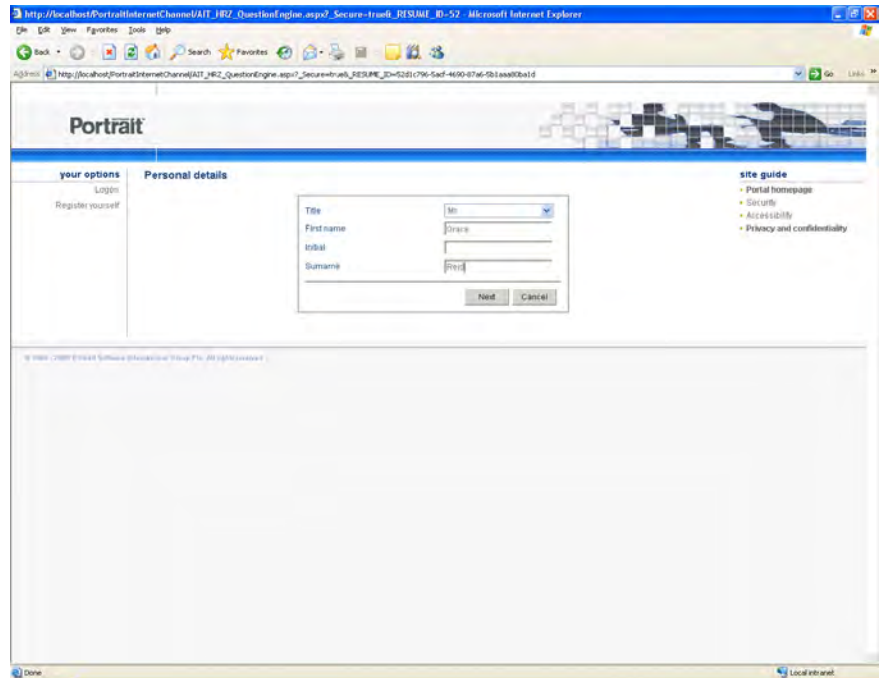
## 4 Register yourself

### 4.1 Personal details

The Register option enables the user to register their details. These can be used to later to identify them in the Portrait Contact Centre or Portrait Web Channel.

A user accesses the home page and clicks **Register yourself**. The application displays the **Personal details** page.

Figure 2 – Personal details

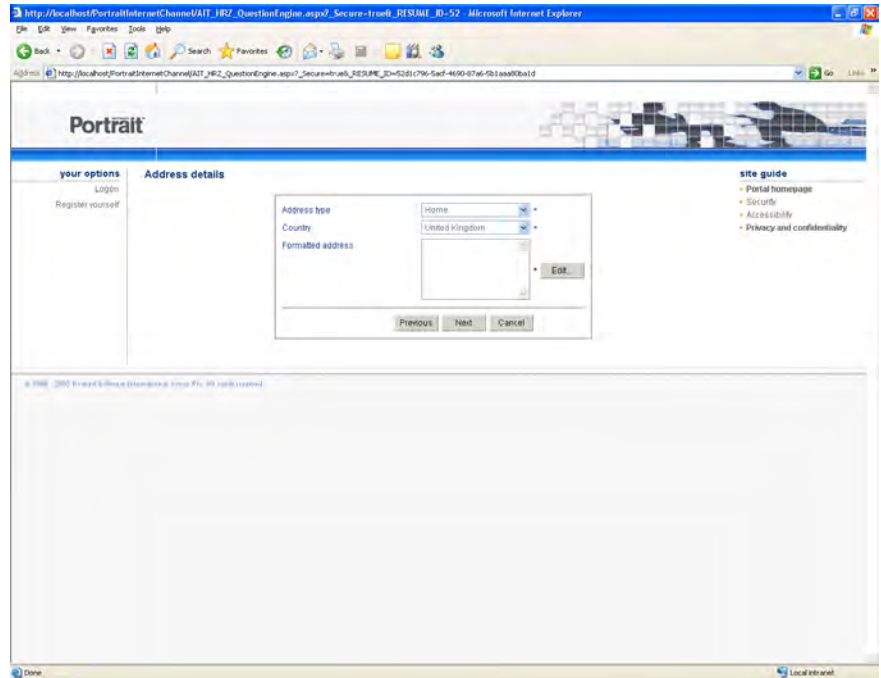


The user enters their details and clicks **Next**. The application displays the **Address details** page.

### 4.2 Address details

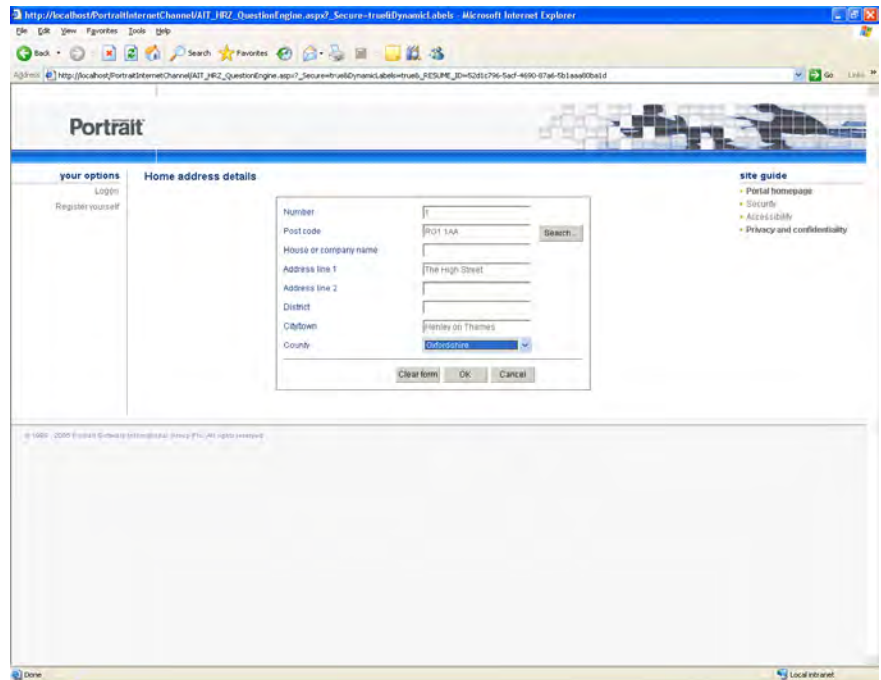
This page enables a user to set up their address details. It utilises the QAS address lookup functionality that is also employed in the Contact Centre application (see the *Contact Centre Functional Overview* for more details on this feature). Note that QAS capability is not installed by the default Portrait installation.

Figure 3 – Address type



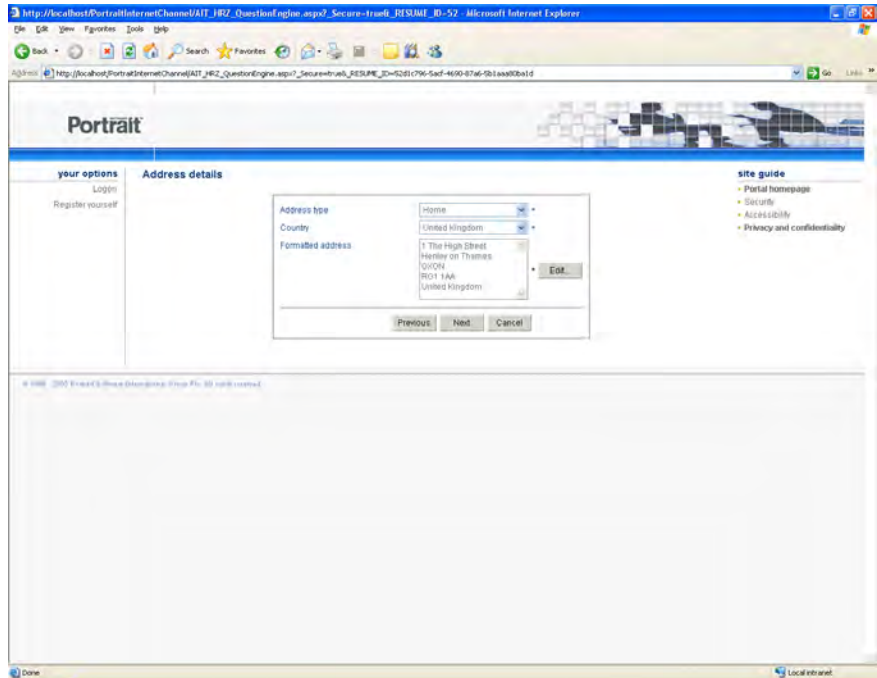
The consumer selects the address type and country and clicks **Edit** to fill in the rest of their address.

Figure 4 – Home address details



The consumer enters their details and clicks **OK**.

Figure 5 – Formatted address details

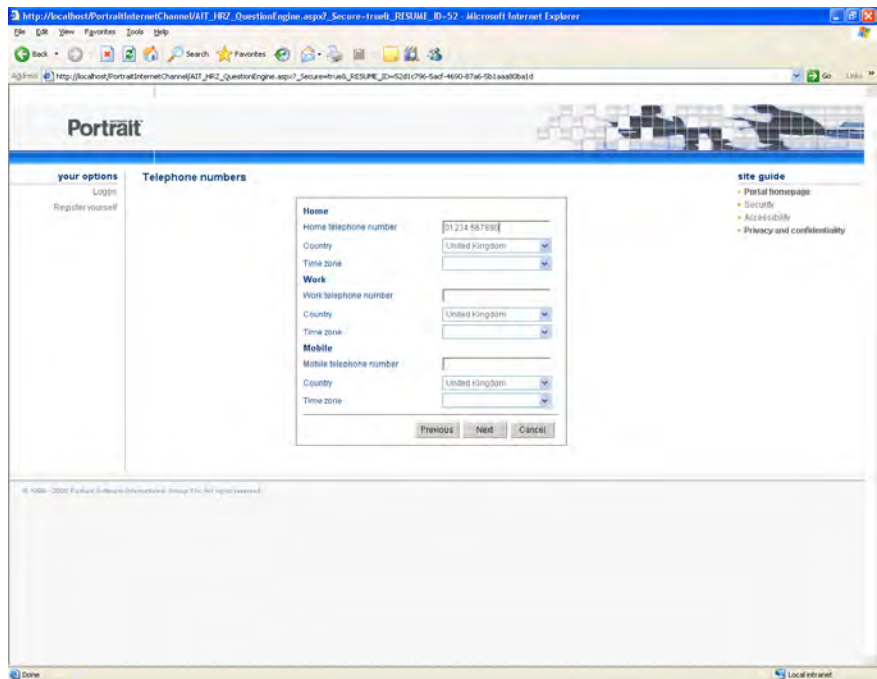


The formatted address is displayed and the consumer clicks **Next**. The application displays the **Contact details** page.

### 4.3 Contact details

This page enables a user to set up their contact details.

Figure 6 – Contact details

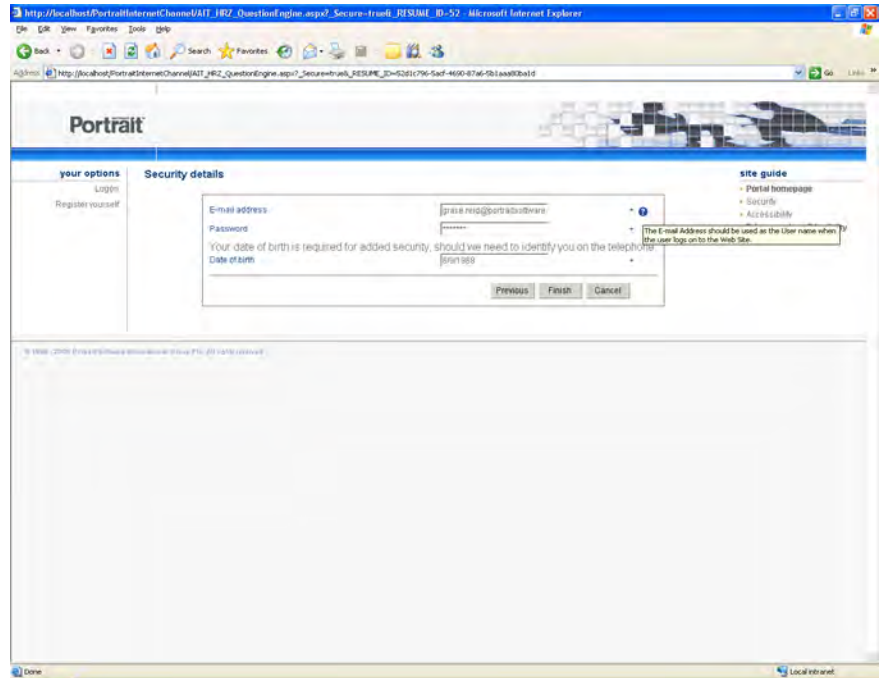


The user enters their details and clicks **Next**. The application displays the **Security details** page.

## 4.4 Security details

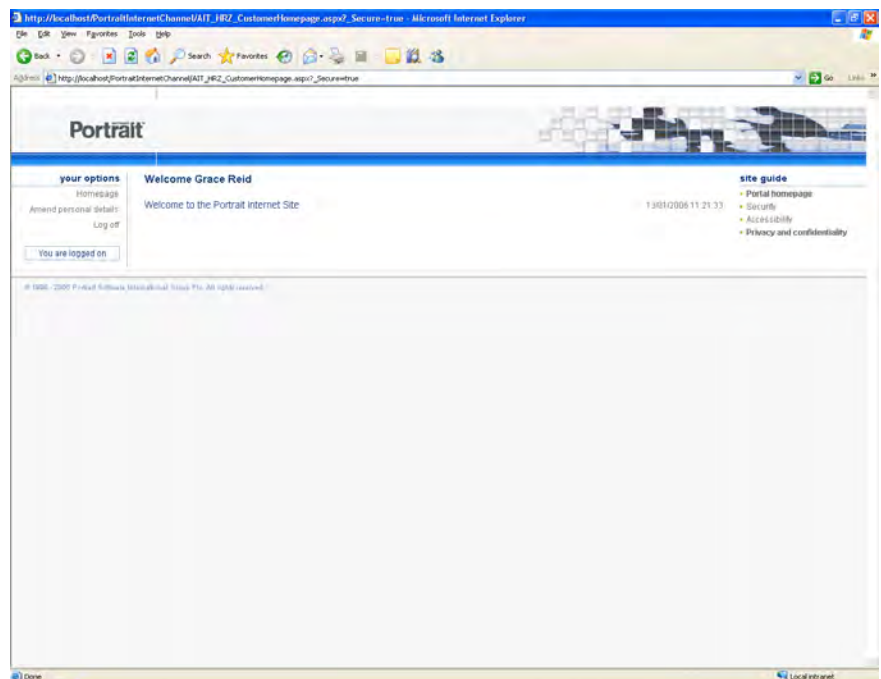
This page enables a user to set up their authentication details, these can be used to authenticate the user in the Web Channel.

Figure 7 – Security details



The user enters the details and clicks **Finish**. The application displays the **Home page** and the user is logged on.

Figure 8 – Successfully logged on



The end results are:

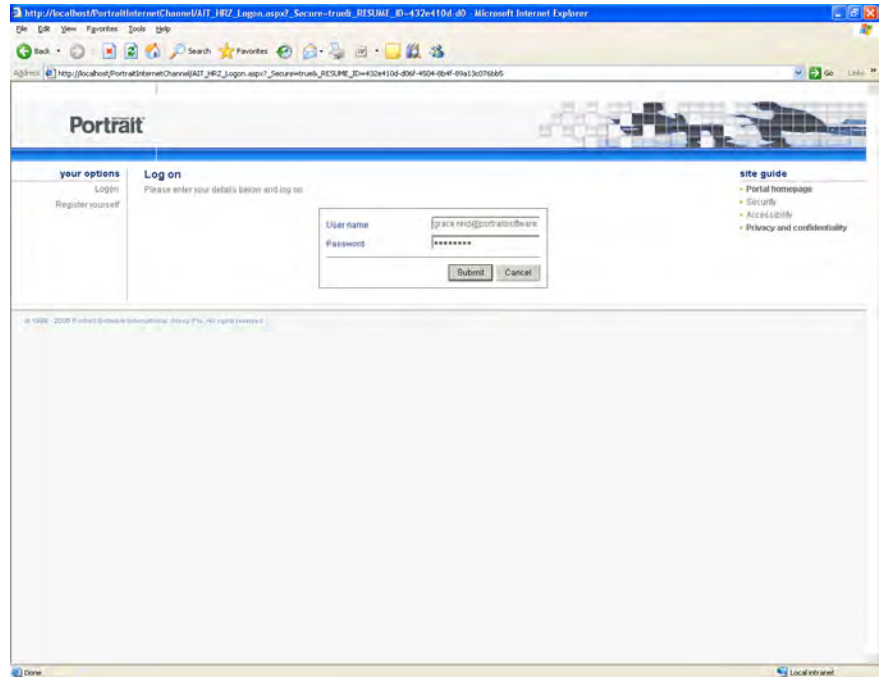
- **The user's details are captured which will allow them to access their contract details via the Portrait Web Channel**
- The application begins a record of a current engagement in the engagement history.
- A log of the registration is created in the engagement history.

## 5 Log on

**Logon** enables a user to log on using the details set up in registration.

A user accesses the **Home page** and clicks **Logon**. The application displays the **Log on** page.

Figure 9 – Log on



The user enters their details (that were set up when they registered with the web site) and clicks **Submit**. The application then displays the **Customer home page**.

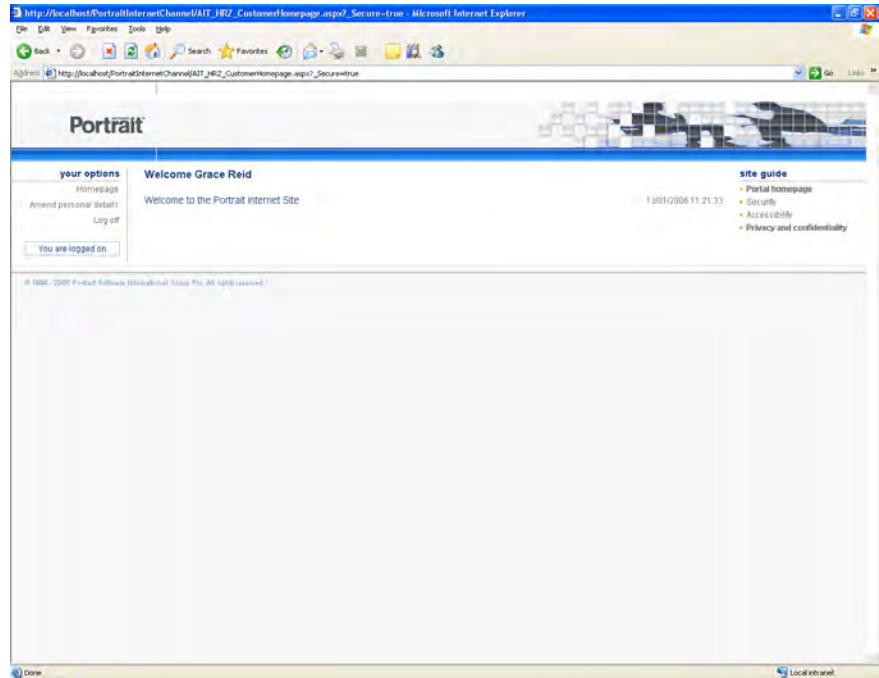
The end results are:

- The user has access to his or her contracts.
- The application begins a record of a current engagement in the engagement history.

### 5.1 Customer home page

The **Customer home** page is the start point for any user activity. It is only accessible when the user is logged on.

Figure 10 – Customer home page



The user now has the following options available within **your options**:

- **Amend personal details.** This allows the user to change his or her personal details.
- **Log off.** This ends the user's session and returns them to the site home page.

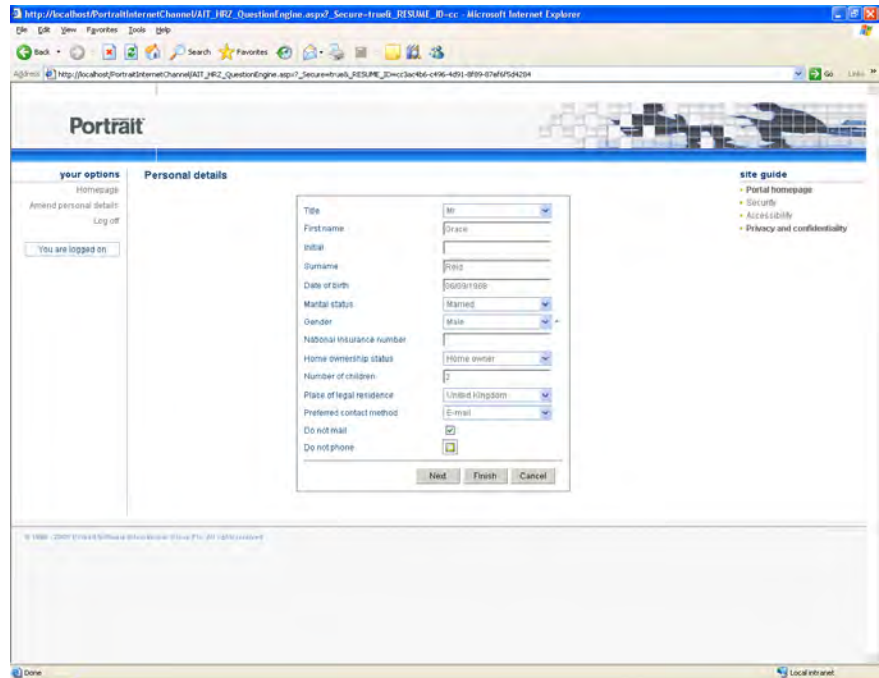
## 6 Amend personal details

### 6.1 Personal details

The **Amend personal details** function enables the user to change personal and employment details.

A user accesses the customer home page and clicks **Amend personal details**. The application returns the **Personal details** page.

Figure 11 – Personal details



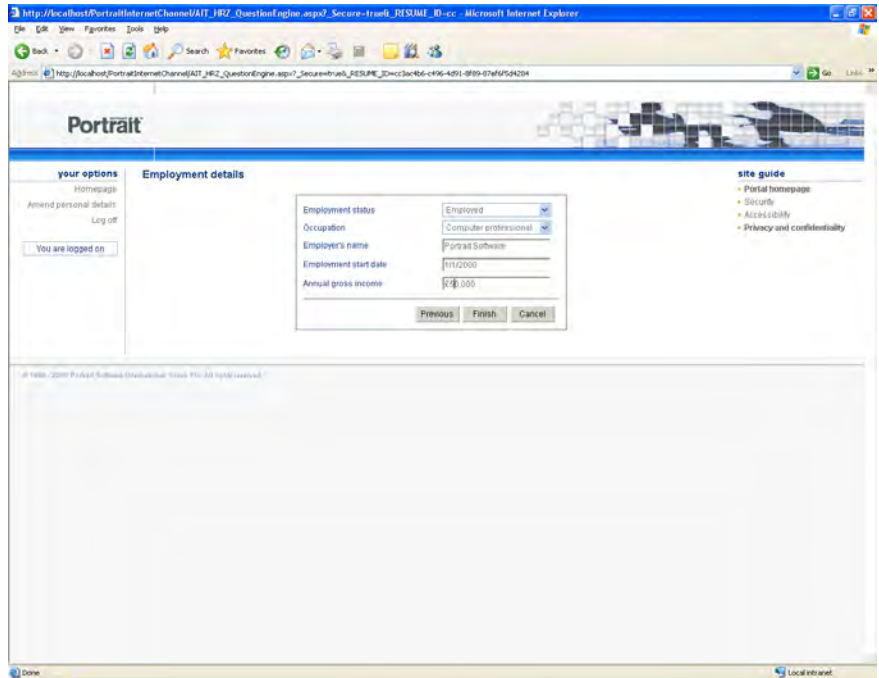
The user amends their details and clicks **Next**. The application displays the **Employment details** page.

### 6.2 Employment details

This page enables a user to set up their employment details.



Figure 12 – Employment details



The user enters their details and clicks **Finish**. This saves the data.

## 7 Log off

**Log off** is only available to logged-on users. **Log off** ends an engagement session. Whilst there is no user interface, an entry is **recorded in the application's** engagement history (and is thus viewable from the Portrait Contact Centre).