Cisco Smart Business Portal

U s e r   G u i d e

Mitchell 1 Business Adapter
Version 2.0.0.2 (May 7th, 2009)

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Notices:

Contents

Cisco Smart Business Portal User Guide

This User Guide will help Cisco Smart Business Portal (CSBP) Users adapt and understand the integration with the Mitchell 1 application and Cisco Smart Business Portal for daily use. The Cisco Smart Business Portal (CSBP) brings information directly the service desk (or wherever the portal client is installed) and presents information based on the caller ID via the Cisco phone system. Areas that are hyperlinked (underlined) are click able and provide additional capability. Phone numbers are hyperlinked as "click to dial". The main page provides immediate information as customers call in for an appointment or for status on work being done. The "extras" page provides additional capability. See below for a complete description of features.

Additional support information can be found below:

For installation or additional support please visit the Cisco Smart Business Portal Website at http://developer.cisco.com/web/sbp/home .

For Mitchell 1 specific information please visit http://developer.cisco.com/web/sbp/wikidocs?src=/wiki/display/SBP/Mitchell+1

CSBP Home Page

Figure 1 illustrates the Portal when initially opened and properly configured. There are 4 areas to take into consideration at the CSBP home page.

In **Area 1**, if you do not see green lights contact your administrator. CSBP will turn green if properly configured. More information can be found in the *CSBP Mitchell Installation Guide*.

Area 2, allows the CSBP user to search by name, zip code, and phone number. Information on the Client Settings button can be found in the install guide and should be configured by your administrator.

Area 3 will contain various web parts for the CSBP Home Page. More information on the each web part can be found in the *CSBP Home Page Web Part Overview* section below.

Area 4 is the Dial Pad that interacts with your Cisco Phones. Answer, Transfer, Hold, and End Call are all available features in the CSBP Dial Pad or the Cisco phone itself. The clear button will remove an entry in the Dial Pad. A right click with the mouse near the dial pad will allow you to add/remove the tool, menu and status bar. It is recommended to only have the status bar showing .

Figure 1.
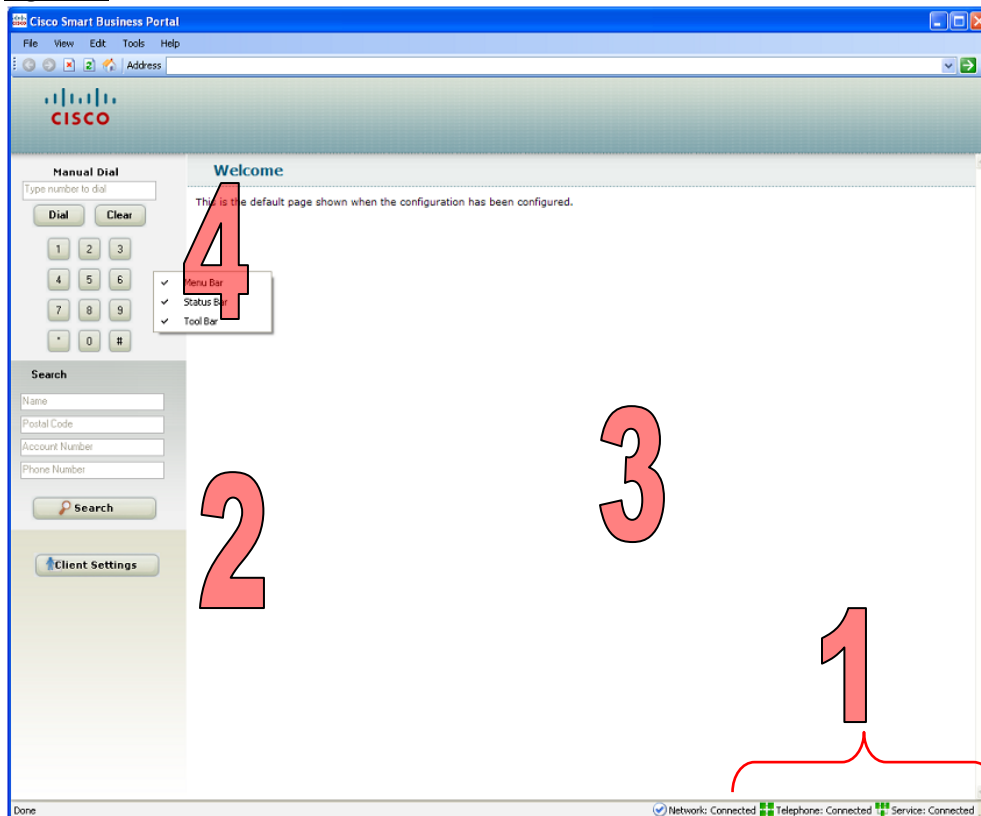
CSBP Home Page Web Part Overview

The information that is displayed in area 3 of the CSBP client will show different information depending on the manual search or incoming call received. In general, however, all telephone numbers that appears in this area can be clicked to initiate a call. You'll know by the underlining for phone numbers. This indicates that "click-to-dial" is enabled for the phone number. A further breakdown of each Webpart can be found below.

Accounts Web Part **(Figure 2):** The Account web part reflects the information from the Vehicle and Customer Tab in Mitchell 1. An additional feature in this web part allows you to click the address into Google maps. This allows ease of access for directions and distance information. Using Google Maps auto complete form capabilities, will allow CSBP users to save shop locations, otherwise users may manually type the address (customers address are already auto filled). For information on Internet Explorer Auto Complete used by Google Maps, visit the following link: http://support.microsoft.com/kb/217148.

Figure2

Charlie Dahl	
#: | **Log**	339
Name:	Charlie Dahl
Business Address:	12515 Parish Road San Diego, CA 92128
Business Phone:	619-555-4545
Home Phone:	619-436-3565
Description:	
From Adapter:	Mitchell1
Spouse Name:	Bard
Last Activity:	3/9/2009
Lifetime Spent:	$2,398.73

Vehicles Web Part **(Figure 3):** Displays all the vehicles for a particular customer. Clicking on the vehicle name will provide more information such as engine size and year. The information in the Vehicles web part mainly reflects Mitchell 1's Vehicle and History tab data.

Figure3

Vehicles				
Name:	**#:**	**Owner:**	**Total Spent:**	**Last In:**
Toyota Land Cruiser	BIGRED	Dahl, Charlie	$1,422.79	3/9/2009 10:00 AM
Volkswagen Beetle	BOVEE	Dahl, Charlie	$988.48	11/13/2004 9:33 AM

Appointments /Estimates Web Part **(Figure 4):** Displays open orders (special orders, estimates, repair orders, and invoices) and appointments for a specific customer. Clicking on the vehicle name will provide additional information such as engine size and year. If an appointment has an order number attached, the information will be displayed in this web part. The information in the Vehicles web part mainly displays Mitchell 1's WIP, Vehicle, History, Schedule and Work-in-Progress Details data.

Appointments will continue to be displayed up to one month after the scheduled appointment, however only the date will display. See below for explanation of this view.

Figure4-1

Appointments / Estimates				
Name:	**#:**	**Est. Amount**	**Appointment Date**	**Promised Date**
1987 Toyota - Land Cruiser (BIGRED)	496	$92.21	3/24/2009 9:30 AM	3/25/2009 5:00 PM
1978 Volkswagen - Beetle (BOVEE)	499		1/21/2005 5:00 PM	1/21/2005 5:00 PM

Occasionaly CSBP user may encounter the below display in the Appointments /Estimates web part as shown in the image below:

Figure4-2

0 (from MitchellAdapter)	3/22/2009 10:00 PM

The above display, in figure4-2, Returns zero vehicles from the Mitchell1 Adapter and occurs only when vehicle and order information are missing or not yet added to the customer's appointment/schedule. When an order is complete and the invoice is closed, the above display also returns zero vehicles and simply the original appointment/promised date. Information displayed in figure4-2 serves as a good reminder that the vehicle/order still needs to be added to an appointment.

Notes Web Part **(Figure 5):** This web part displays the Mitchell 1 Recommendations sections. Any recommendation for a customer vehicle will be listed here. You'll be able to view and discuss with your customer before scheduling the next appointment.
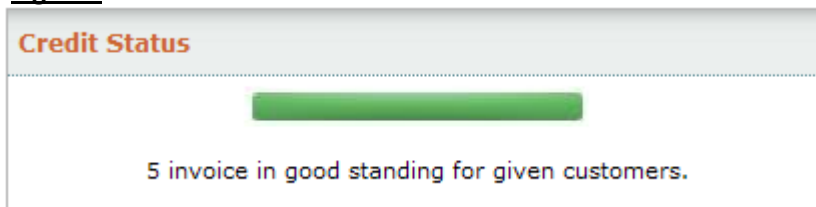
Figure5

Date:	Type:	Description:	Name:
11/24/2001	Clutch	Needs clutch (slipping slightly) within 1000 miles - Watch Temperature Gauge!!!	1987 Toyota Land Cruiser
10/28/2001	Charging & Starting Systm	Needs alternator - waiting for call back	1987 Toyota Land Cruiser
10/16/2001	Engine Performance/Fuel	Needs tuneup & air cleaner	1978 Volkswagen Beetle

Credit Status Web Part **(Figure 6):** This status indicator changes color based on the customer's credit status.

If the customer has paid all his invoices then the status bar is green.
If the customer has any partially unpaid invoices the status bar is yellow.
If the customer has fully unpaid invoices then the status bar is red. Red takes precedence.
Notations below the color bar indicate the quantity and status of each type of invoice.
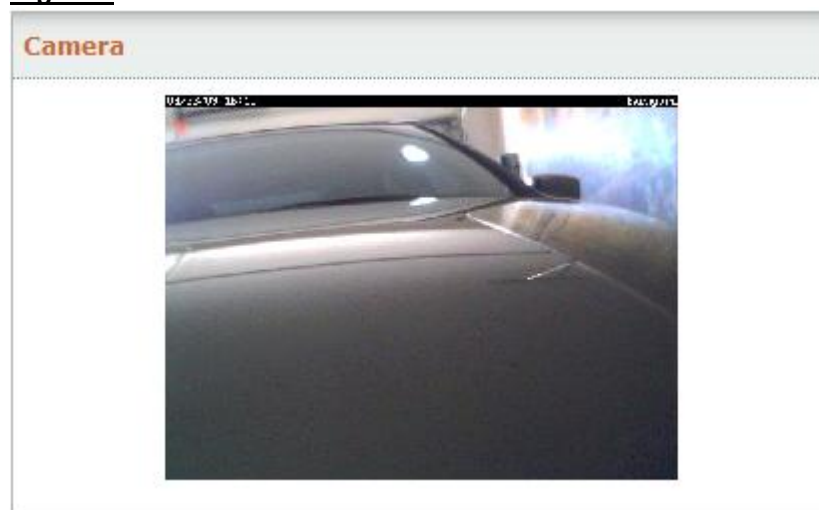
Figure6

Credit Status

5 invoice in good standing for given customers.

Map Web Part **(Figure 7):**   This web part shows the customer address in a map view. This Map web part appears immediately similar to caller ID. Incorrect addresses will not display. The mouse wheel allows for zooming. Also, Click and Drag features are available in this web part for panning.

Figure7

12515 Parish Road, 92128
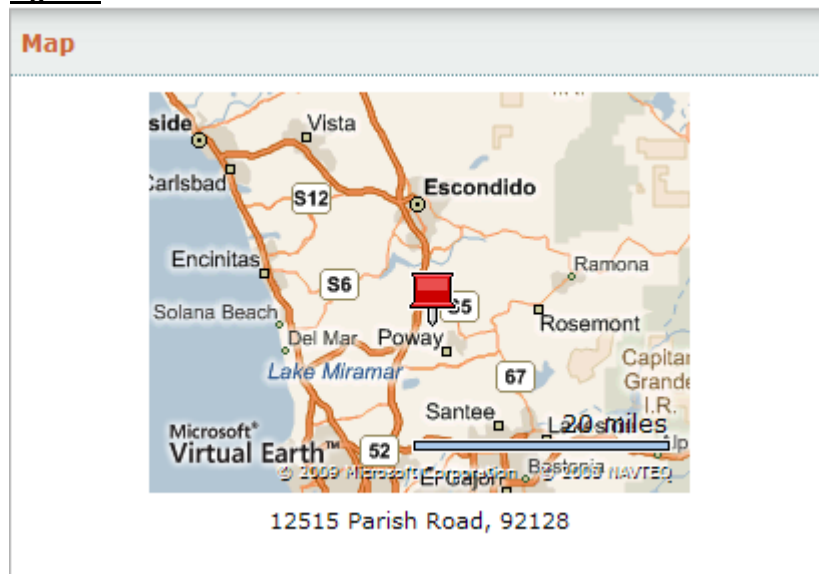
Video Camera Web Part **(Figure 8):** This web part provides a live video feed into your work environment and auto shop. The Linksys WVC200 allows you to move the camera via a Web Browser. Please click here for more information on the Linksys WVC200. Also make sure you can access the camera in Internet Explore via http://<ipaddress_of_camera>. The camera version and model that you choose only needs to be accessible via Internet explorer to be compatible with the Cisco Smart Business Portal.

 Figure 8

Launch Pad Web Part **(Figure 9):** You can access commonly used Internet links that you wish to have readily accessible for your daily automotive shop activities. Napa, WorldPac and more can be accessed via this web part. The launch pad is customized upon installation to meet your automotive shops daily needs. Please contact your Cisco Smart Business Portal administrator or Cisco support partner to request these changes. Instructions to customize the Launch Pad web part can be found in the *CSBP Mitchell Installation Guide*.

Common on all deployed portal views is the "Extras" link which opens *the Cisco Smart Business Portal Mitchell1 Intermediate Page*.

Figure9
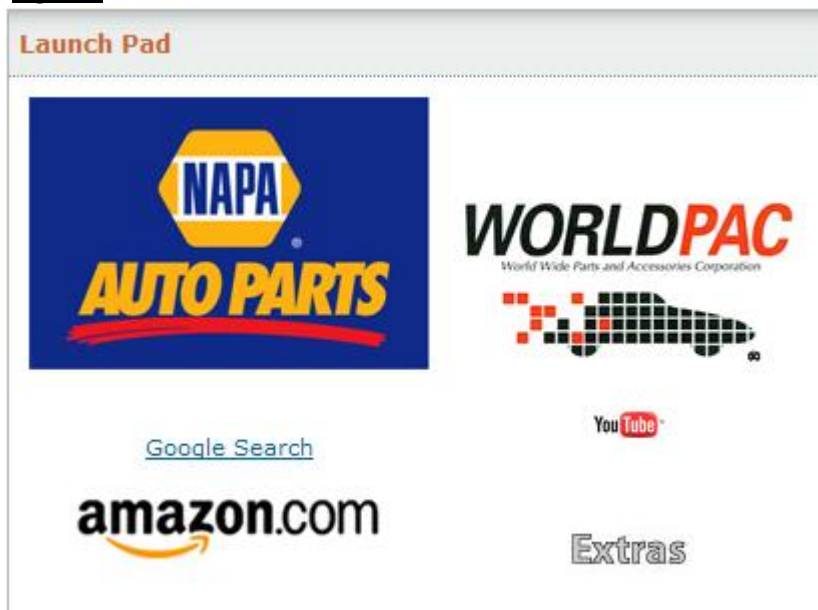
CSBP Home Page Intermediate (Extras) Web Part Overview.

The "Extras" page includes additional functionality.

- Vendor Search and List

- Reporting urgent problems to the manager

- 3 Day Following up with customers

- Tomorrow's Scheduled Appointments List

Also the records and information displayed in the Extras page are not specific to the customer, but provide additional capability commonly used for extra tasks.

To return to the Home Page simply search for the record via the manual dial pad or press the "backspace" key on your computer keyboard. When a new call comes in, the view will automatically return to the default page view.

Vendor Web Part **(Figure 10):**   This web part lists the top 5 vendors for the previous 12 months. Click to dial features are enabled in this web part and more information on the vendor can be gather by clicking on the vendor Name. Use this web part to locate parts prior to scheduling appointments or for other tasks that require vendor phone click to dial functionality.

This web part also includes search functionality.   Type the first few letters to begin the search. You may also search for "Tow" and any vendor with "tow" contained in the name will return.

Figure10

Vendors

Name:	#:	Address:	Phone:	Owner:
Bankston	WO	San Diego, CA	619-555-4545	Keith
Big-O Tire Co.	BIGO	El Cajon, CA	(619)343-3333	Joe Dwulet
Point West Volvo	PW	San Diego, CA	619-438-6586	Fran
Safety Kleen	SAF KLEN	San Diego, CA	619-896-6966	
Pro-Tow	TOW	San Diego, CA	800-898-6745	

3-Day Follow-Up Web Part **(Figure 11):**   This web part displays all customers that have a completed appointment and have the invoice posted in Mitchell 1. If the completed time value is not inserted by the Mitchell 1 user and the invoice is posted, the Cisco Smart Business Portal will not list information in this web part. Please note, the Invoice Date shown in figure 11 is the posted date and not the completed time. The completed time is not displayed in Cisco Smart Business Portal but is required for this web part to return your Mitchell 1 information.

Figure11

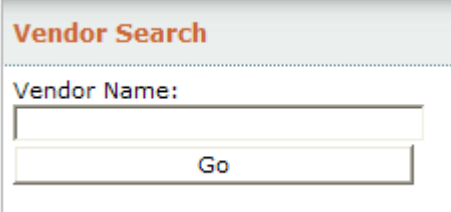| 3-day Follow-Up					
Name:	#:	Phone:	Owner:	Invoice Date:	Amount:
1986 Chevrolet - Pickup C10	9467JZ	619-555-4542	Zorrensen, Don	3/20/2009	$124.00
1988 Nissan - 200SX SE	THEJUDD	(619)814-0369	Judd, Ron	3/18/2009	$305.23

Tomorrow's Appointments Web Part **(Figure 12):** This web part displays all appointments for all customers that have an appointment for the current date and tomorrow's date. Much like the Appointment /Estimate web part if no order or vehicle is attached, this Web Part will return a value similar to Figure4-2.

Figure12

Tomorrow's Appointments							
Name:	#:	Phone:	Owner:	Est. Amount	Appointment Date	Promised Date	Notes:
1987 Toyota - Land Cruiser (BIGRED)	496	619-555-4545	Dahl, Charlie	$92.21	3/24/2009 9:30 AM	3/25/2009 5:00 PM	
1992 Nissan - Maxima SE (HYY15Y)	476	(619)785-0909	Doe-Jones, Jane	$809.37	3/24/2009 7:42 AM	3/25/2009 5:00 PM	
2004 Audi - A4 (5LK23KL)	596	(619)430-3980	Allen, Torren	$164.22	3/23/2009 8:00 AM	3/20/2009 5:00 PM	Home: 619-447-8059

Vendor Search Web Part **(Figure 13):** This web part is used to search your vendor list by name, returns the vendor list and populates the Vendor web part (**figure10**). You may also search using a partial word.
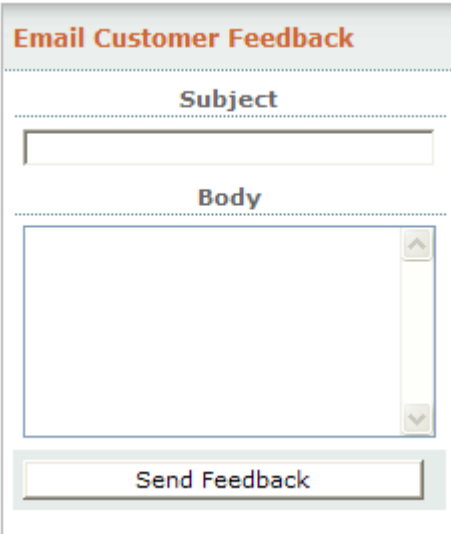
Figure13

Email Feed Back Web Part **(Figure 14):** This web part is to be used in those rare cases that an issue arises that requires immediate notification to the manager via email. A subject and title allows the user to quickly send an email to the person in charge. This web part is located where current appointments and 3 day previous appointments are listed. You should include name, date, phone number as well as reason and other pertinent information, then click "Send Feedback". This immediately sends an email message to the designated manager. To configure this web part please read the *CSBP Mitchell Installation Guide*.

Figure14

Personalization

Personalization is a Cisco Smart Business Portal customization feature that allows users to change the appearance of the portal view. Different Cisco Smart Business Portal users may want web parts in different places to help prioritize the task or job at hand. **Figure 14** illustrates a web part that has personalization turned on. When turned on, in the top right corner of every web part a down arrow (see red circle) allows users to minimize that web part, effectively hiding it. To return each web part to the original size, click the arrow again.

To enable personalization please read the *CSBP Mitchell Installation Guide*.

The Cisco Smart Business Portal Home Page also allows users to move each web part to custom locations. To do this, simply click and drag the web part header area, which is the blank area to the left of the down arrow (see red circle).

Charlie Dahl	
#: | **Log**	339
Name:	Charlie Dahl
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Business Phone:	619-555-4545
Home Phone:	619-436-3565
Description:	
From Adapter:	Mitchell1
Spouse Name	Bard
Last Activity	3/9/2009
Lifetime Spent:	$2,398.73