



## Customer Portal SDK- StreamOne User Manual

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## About the Application

It is easy to get started with Customer Portal SDK - StreamOne. Every StreamOne order with a Microsoft CSP subscription works as a bucket, where you can simply change the license count to have access to more units of each product line without the need to place another order. The unit of measure for Microsoft licenses are known as “seats”. This application allows you, as the customer, and your end user, to request more seats, on demand, 24/7 without the need to visit StreamOne.

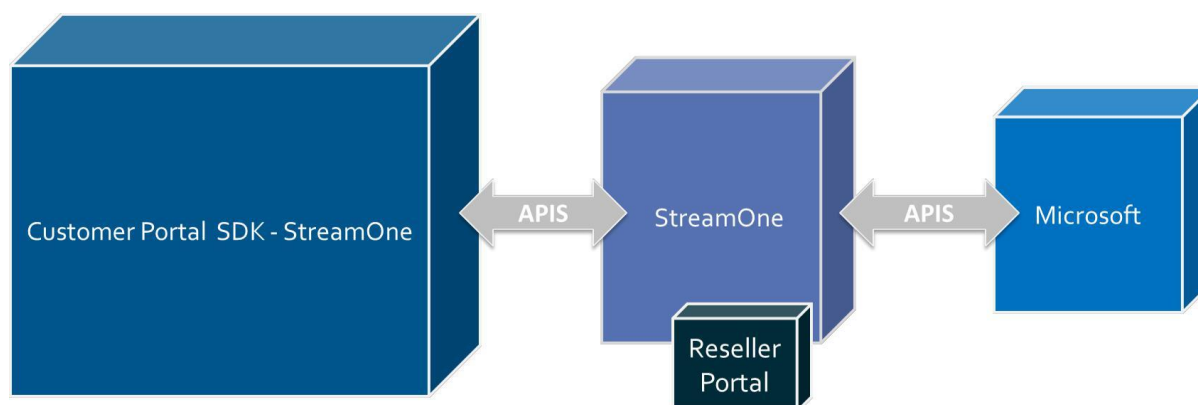
The Customer Portal does not replace StreamOne but offers an alternative environment for seat modification.

As a customer, you will have access to all your end users and their Microsoft CSP subscriptions. For your end user's, all you need is to do is grant them access and decide which sales order they should have access to. Customer Portal SDK is an easy and time-saving app for making license quantity changes once the initial order has been placed. It's also a hassle-free solution that gets the job done right away.

### What is Customer Portal SDK - StreamOne?

Basically, it is a management platform with two levels; Customer Portal & End User Portal. It is a web app that runs on a browser and is connected to StreamOne by APIs. It's an application that must be hosted on Azure and uses active directory login (Microsoft authentication).

## How to access this application?



We believe by the time you read this document you will have completed the setup and hosting and have the site running with your customized URL. An example of this URL is:

<https://Domain.azurewebsites.net>

By default, there will be an admin user for the application, who will be responsible for granting access to other users. Users with admin rights can access the configuration page (URL shown below) and assign other users the rights to view certain reseller lists. When entering new email addresses, they should be separated by a comma (,).

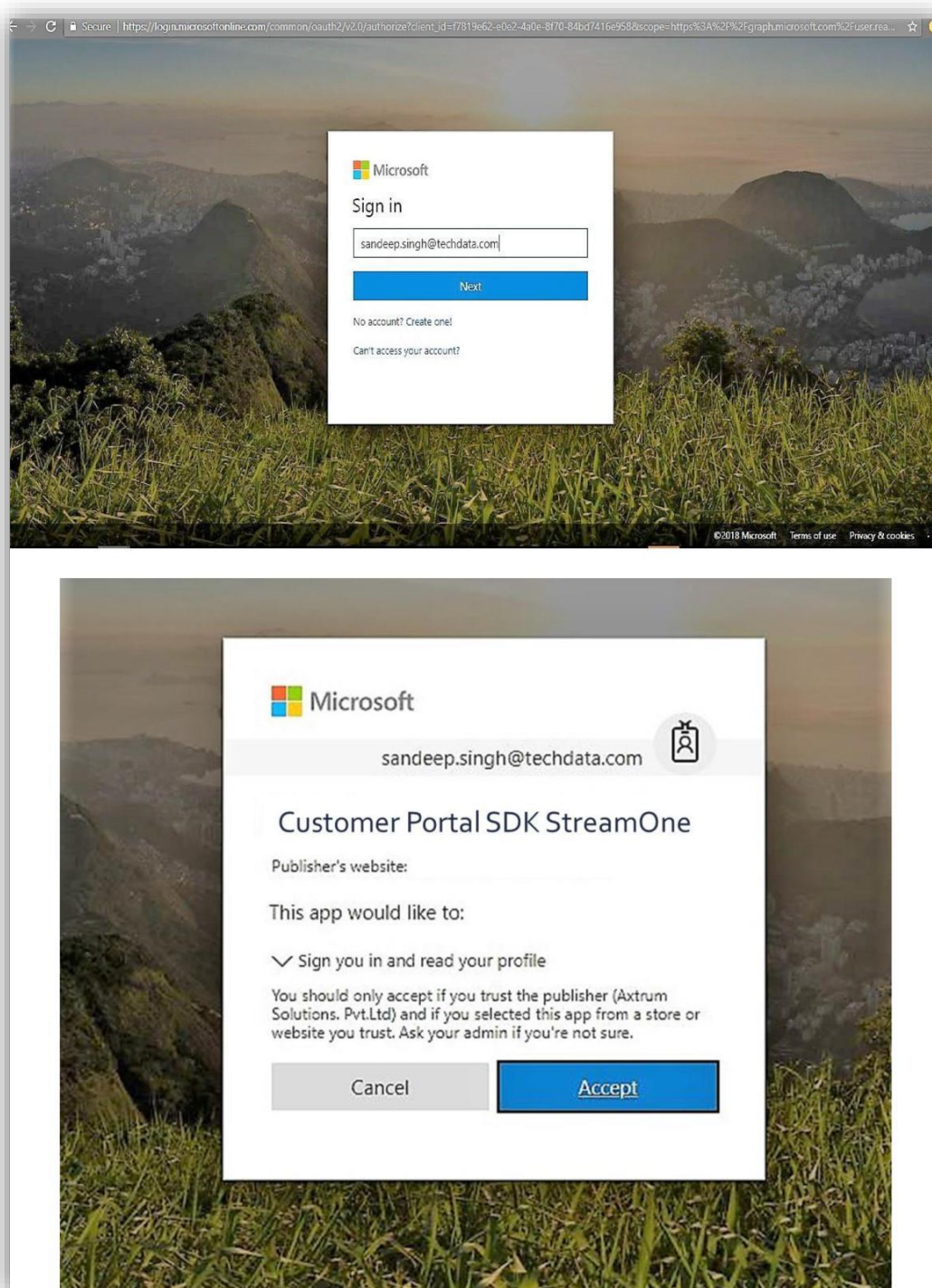
**Configuration Page URL:** <https://Domain.azurewebsites.net/configuration>

Customer Portal SDK		Customer Admin	Settings ▾	Hello Singh/Akshay: Log off	
Configuration Settings					
APP CONFIGURATION					
AppUrl	https://privatelabelite-integration.azurewebsites.net				Edit
AllowedResellers	Mateus.luttrebach@techdata.com, masood.ahmad@blue-thread.com, sandeep.singh@blue-thread.com, akshay.singh2@techdata.com,				Edit
ApplicationName	Customer Portal SDK				Edit
ResellerName	Tech Data 2				Edit
ResellerId	703212				Edit
API SETUP					
grant_type	client_credentials				Edit
SOIN	ORSXOMZUGU3GOZTIPBSXGZ3UNFXW44ZWG42DGO8V				Edit
client_id	*****				Edit
TokenOAuth	https://eauth.techdata.eu/as/token/oauth2				Edit
client_secret	*****				Edit
API CALLS					
SubscriptionSearchUrl	https://partnerapi.tdstreamone.eu/order/subscriptions/				Edit
VendorCatalogSearchUrl	https://partnerapi.tdstreamone.eu/catalog/search				Edit
VendorListUrl	https://partnerapi.tdstreamone.eu/catalog/vendors				Edit
ModifyAddOnUrl	https://partnerapi.tdstreamone.eu/order/addOns				Edit
OrderDetailUrl	https://partnerapi.tdstreamone.eu/order/details/				Edit
OrderModifyUrl	https://partnerapi.tdstreamone.eu/order/				Edit
OrderSearchUrl	https://partnerapi.tdstreamone.eu/order/search				Edit
CustomerSearchURL	https://partnerapi.tdstreamone.eu/endCustomer/search				Edit

**Note-** For more details please check the "Application Configuration" section of this document.

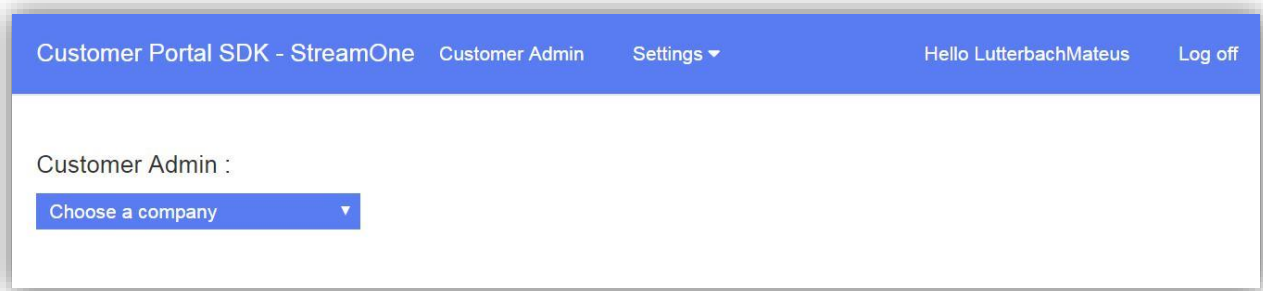
## Login Screens

When you log in you will be redirected to your site and you will be prompted to enter your credentials (Microsoft authentication.)



Once complete, click on **Accept** and you will be directed to the respective portals i.e. Customer or End User Portal.

The Customer Portal will show all the CSP licences when you select a specific company from the list:



Before you can offer access to end users, you need to do some basic set up on the Customer Portal.

## Customer Portal

On the Customer Portal, you can modify the number of licenses for Microsoft CSP products, just like if you were in StreamOne, and every seat modification will trigger a notification email.

You can also manage users and the visibility those users have of their sales orders and their products.

To add users, you should:

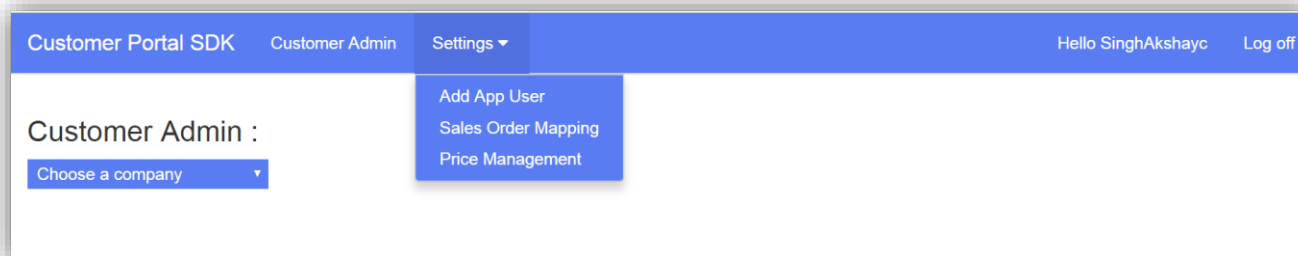
- Go to [Settings>Add App User](#)
- Create a user by adding a new email to access the app and link this email to a Company Name

To control the visibility those users, have of their sales orders and their products you should:

- Go to [Setting>Sales Order Mapping](#)
- Mark or unmark a sales order to make it available or not to a specific user

## Settings

The settings tab will only be visible to resellers or anyone who has admin rights.



Under Settings you will see the following options:

1. [Add App User](#)
2. [Sales Order Mapping](#)
3. [Price Management](#)



## Add App User

Using this option grants the end user access. An email will be triggered as soon as a new user is added.

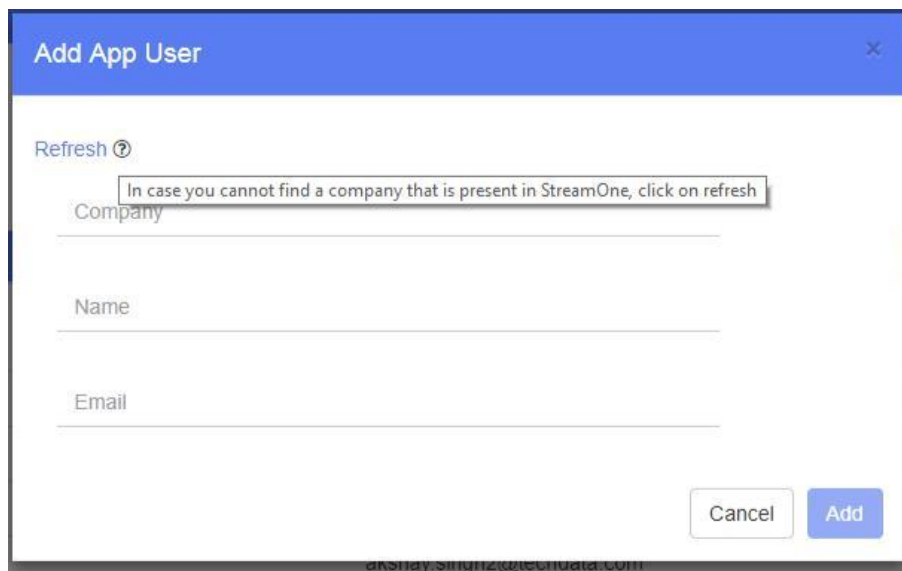
By clicking [Add App User](#) you will be directed to the app user management page where you can assign a company to the end user.

## App User Management

This page contains the list of users that belong to a company. Various actions can be performed;

### Add a user

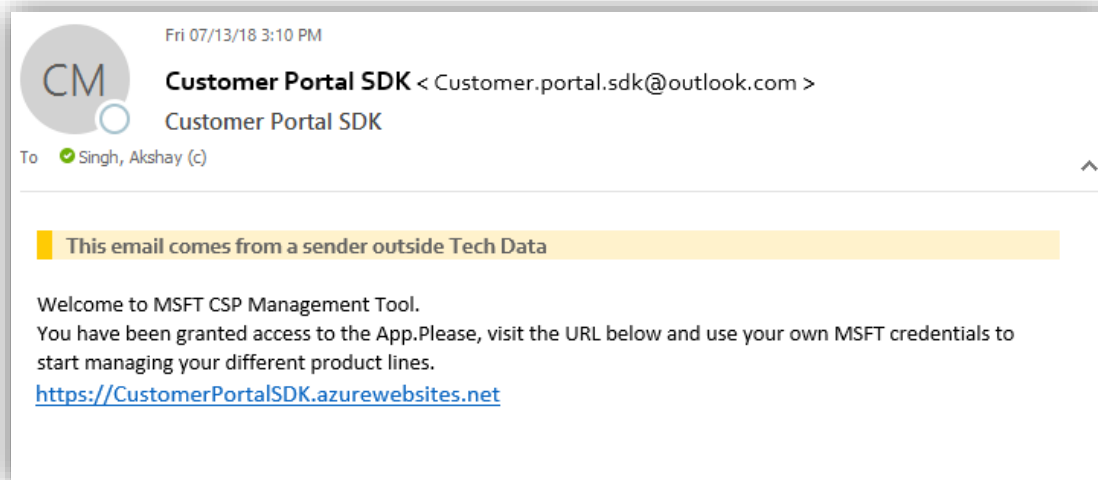
1. Click Settings > [Add App User](#)



2. Click **"Refresh"** before you proceed in case you do not see a particular company listed
3. Provide the following information:
  - a. Company
  - b. Name
  - c. Email



4. An email notification will be sent to the user immediately



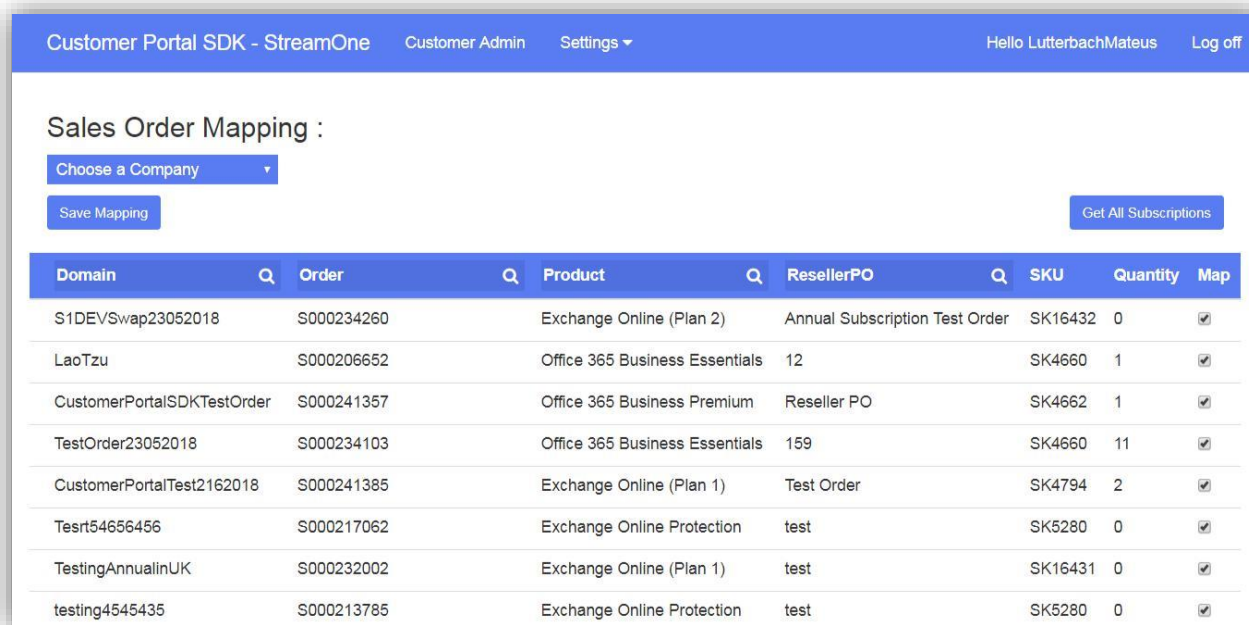
## Delete a user

You also have the option to delete users from a company. Users with no access will not be able to see any orders when logged in.

## Sales Order Mapping

Once an app user is added they should be linked to a sales order. By doing this all users that belong to the same company will have access to the sales order.

1. Click Settings > [Sales Order Mapping](#)



Customer Portal SDK - StreamOne Customer Admin Settings ▾ Hello LutterbachMateus Log off

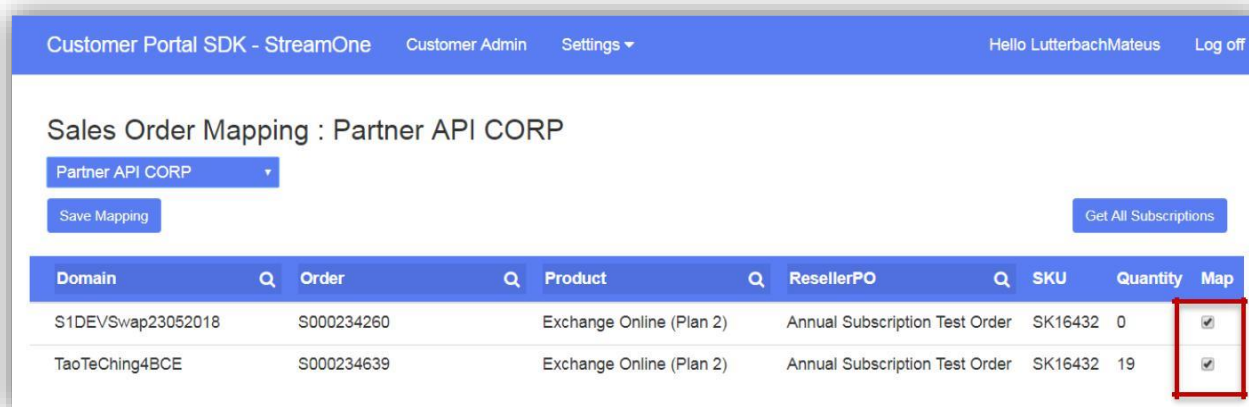
Sales Order Mapping :

Choose a Company ▾

Save Mapping Get All Subscriptions

Domain	Order	Product	ResellerPO	SKU	Quantity	Map
S1DEVSwap23052018	S000234260	Exchange Online (Plan 2)	Annual Subscription Test Order	SK16432	0	<input checked="" type="checkbox"/>
LaoTzu	S000206652	Office 365 Business Essentials	12	SK4660	1	<input checked="" type="checkbox"/>
CustomerPortalSDKTestOrder	S000241357	Office 365 Business Premium	Reseller PO	SK4662	1	<input checked="" type="checkbox"/>
TestOrder23052018	S000234103	Office 365 Business Essentials	159	SK4660	11	<input checked="" type="checkbox"/>
CustomerPortalTest2162018	S000241385	Exchange Online (Plan 1)	Test Order	SK4794	2	<input checked="" type="checkbox"/>
Testrt54656456	S000217062	Exchange Online Protection	test	SK5280	0	<input checked="" type="checkbox"/>
TestingAnnualinUK	S000232002	Exchange Online (Plan 1)	test	SK16431	0	<input checked="" type="checkbox"/>
testing4545435	S000213785	Exchange Online Protection	test	SK5280	0	<input checked="" type="checkbox"/>

2. Choose Company and check the box to map any CSP license to that company:



Customer Portal SDK - StreamOne Customer Admin Settings ▾ Hello LutterbachMateus Log off

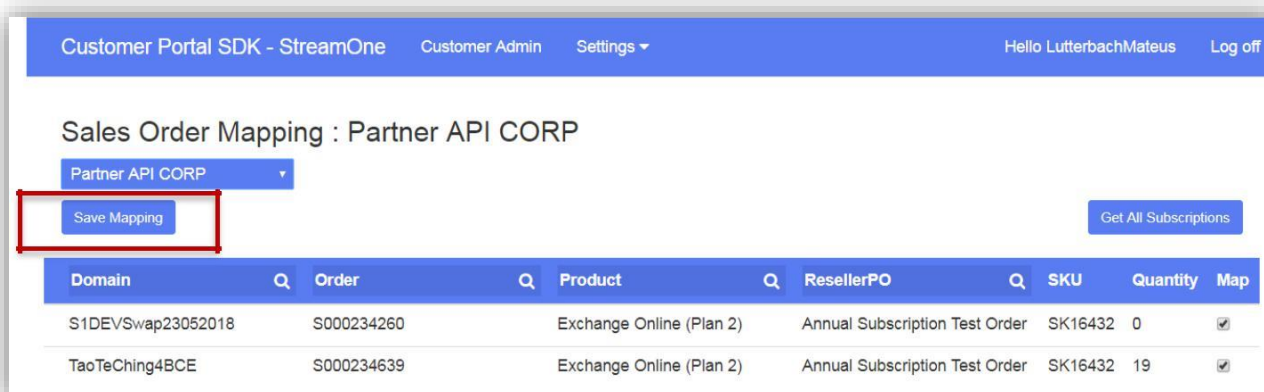
Sales Order Mapping : Partner API CORP

Partner API CORP ▾

Save Mapping Get All Subscriptions

Domain	Order	Product	ResellerPO	SKU	Quantity	Map
S1DEVSwap23052018	S000234260	Exchange Online (Plan 2)	Annual Subscription Test Order	SK16432	0	<input checked="" type="checkbox"/>
TaoTeChing4BCE	S000234639	Exchange Online (Plan 2)	Annual Subscription Test Order	SK16432	19	<input checked="" type="checkbox"/>

### 3. Click [Save Mapping](#)



Customer Portal SDK - StreamOne   Customer Admin   Settings ▾   Hello LutterbachMateus   Log off

#### Sales Order Mapping : Partner API CORP

Partner API CORP ▾

**Save Mapping**   [Get All Subscriptions](#)

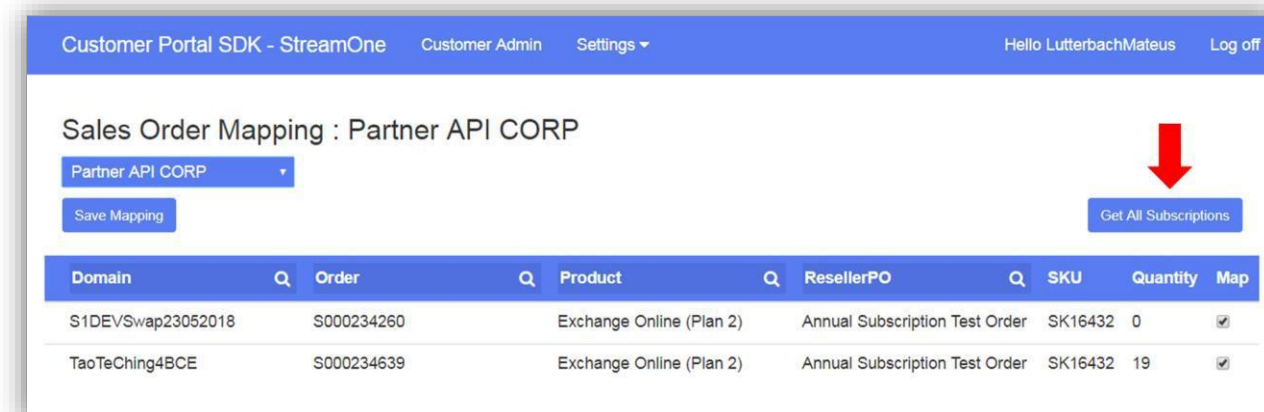
Domain	Order	Product	ResellerPO	SKU	Quantity	Map
S1DEVSwap23052018	S000234260	Exchange Online (Plan 2)	Annual Subscription Test Order	SK16432	0	<input checked="" type="checkbox"/>
TaoTeChing4BCE	S000234639	Exchange Online (Plan 2)	Annual Subscription Test Order	SK16432	19	<input checked="" type="checkbox"/>

### Important

There are certain functionalities you must be aware of in this section of the application.

### [Get All Subscriptions](#)

You must click on [Get All Subscriptions](#) regularly in order to see the most up to date list of sales order and companies. Please be aware that there is a loading time for new data.



Customer Portal SDK - StreamOne   Customer Admin   Settings ▾   Hello LutterbachMateus   Log off

#### Sales Order Mapping : Partner API CORP

Partner API CORP ▾

[Save Mapping](#)   **Get All Subscriptions**

Domain	Order	Product	ResellerPO	SKU	Quantity	Map
S1DEVSwap23052018	S000234260	Exchange Online (Plan 2)	Annual Subscription Test Order	SK16432	0	<input checked="" type="checkbox"/>
TaoTeChing4BCE	S000234639	Exchange Online (Plan 2)	Annual Subscription Test Order	SK16432	19	<input checked="" type="checkbox"/>

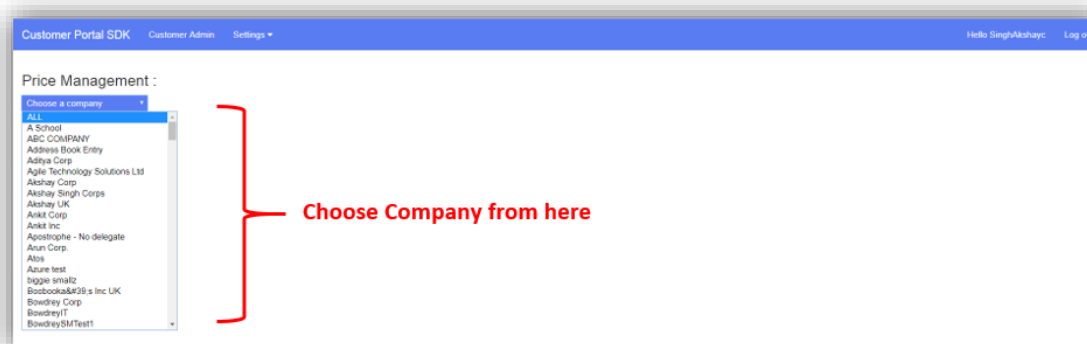
### [Search](#)

You can use the search option to see the list of orders that belong to a company. The search functionality is dynamic in nature, as you start typing it will pull the results with the closest match.

## Price Management

Using this option sets the following:

1. Markup
2. Seat Increase Limit
3. Tax Information



There are two scenarios for **Price Management**

A. For all orders of a company:

Step 1: Select the company from the drop down list on the price management page

Step 2: Enter the values and click on 'Save Prices'

Price Management : Tech Data

Save Markup %: 10    Seat Increase Limit: 3    Tax: ☒ Tax included, ☐ Tax excluded, ☐ Empty

Click Here: Save Prices


Enter Values here

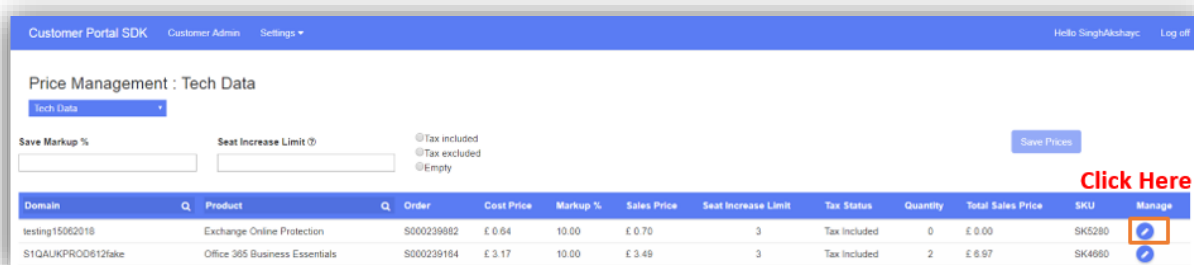
Domain	Product	Order	Cost Price	Markup %	Sales Price	Seat Increase Limit	Tax Status	Quantity	Total Sales Price	SKU	Manage
testing15062018	Exchange Online Protection	S000239882	£ 0.64	10.00	£ 0.70	3	Tax Included	0	£ 0.00	SK5280	
S1QAUKPRODS12fake	Office 365 Business Essentials	S000239164	£ 3.17	10.00	£ 3.49	3	Tax Included	2	£ 6.97	SK4960	
testing4090094	Exchange Online Protection	S000243089	£ 0.64	10.00	£ 0.70	3	Tax Included	0	£ 0.00	SK5280	
edibicpen	Office 365 Business Premium	S000236846	£ 7.92	10.00	£ 8.71	3	Tax Included	0	£ 0.00	SK4962	
Testdomainun01	Office 365 Business Essentials	S000102149	£ 2.61	10.00	£ 2.87	3	Tax Included	1	£ 2.87	SK4960	
MarcusTestCSP2	Office 365 ProPlus	S000100018	£ 8.52	10.00	£ 9.37	3	Tax Included	1	£ 9.37	SK4964	
shyangemanna1	Office 365 Business Essentials	S000171385	£ 3.17	10.00	£ 3.49	3	Tax Included	0	£ 0.00	SK4960	
TESTUK0010507Skype	Skype for Business Online (Plan 2)	S000244725	£ 3.49	10.00	£ 3.84	3	Tax Included	0	£ 0.00	SK5032	
L907zu	Office 365 Business Essentials	S000209952	£ 3.17	10.00	£ 3.49	3	Tax Included	1	£ 3.49	SK4960	
S1QAMyUKProd1	Office 365 Business	S000235948	£ 6.64	10.00	£ 7.30	3	Tax Included	0	£ 0.00	SK4961	
UKtesting03152018	Exchange Online (Plan 1)	S000219862	£ 2.53	10.00	£ 2.78	3	Tax Included	0	£ 0.00	SK4794	
S1QAUKLindaTest1	Office 365 Business Essentials	S000242226	£ 3.17	10.00	£ 3.49	3	Tax Included	0	£ 0.00	SK4960	

B. For a specific order or domain:

Step 1: Select the company from the drop down list on the price management page.

Step 2: Select the desired order or domain

Step 3: Now click on the 'manage icon' 






Customer Portal SDK Customer Admin Settings Hello SinghAkshayc Log off

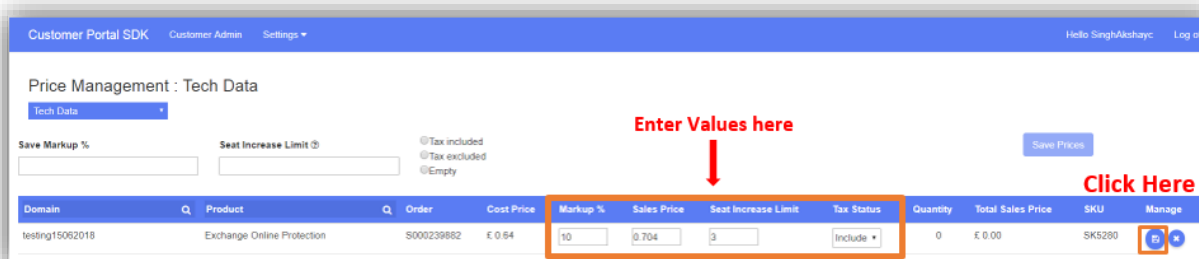
Price Management : Tech Data

Tech Data

Save Markup % Seat Increase Limit @ Tax included Tax excluded Empty Save Prices

Domain	Product	Order	Cost Price	Markup %	Sales Price	Seat Increase Limit	Tax Status	Quantity	Total Sales Price	SKU	Manage
testing15062018	Exchange Online Protection	S000239882	£ 0.64	10.00	£ 0.70	3	Tax Included	0	£ 0.00	SK5280	
STQAIKPROD0612fake	Office 365 Business Essentials	S000239164	£ 3.17	10.00	£ 3.48	3	Tax Included	2	£ 6.97	SK4660	

Step 4: Enter the values and click on the **save icon** 




Customer Portal SDK Customer Admin Settings Hello SinghAkshayc Log off

Price Management : Tech Data

Tech Data

Save Markup % Seat Increase Limit @ Tax included Tax excluded Empty Save Prices

Domain	Product	Order	Cost Price	Markup %	Sales Price	Seat Increase Limit	Tax Status	Quantity	Total Sales Price	SKU	Manage
testing15062018	Exchange Online Protection	S000239882	£ 0.64	10	0.704	3	Include	0	£ 0.00	SK5280	

## Important


If you haven't set the markup values for any order or domain then the price information for that won't be visible on the End-Customer Domain

## END USER PORTAL


End users will only see sales orders of the companies that they have been given access to and will only see sales orders that they have been mapped to:

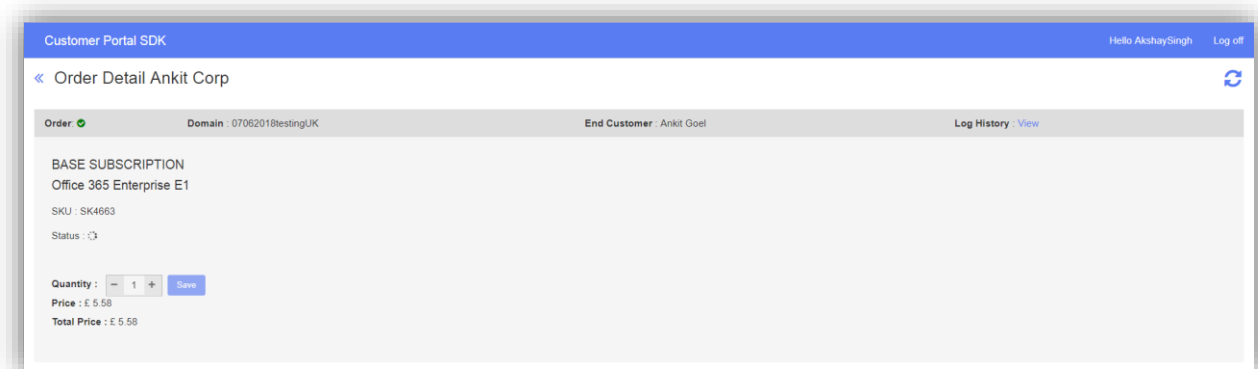
Customer Portal SDK									
									Hello AkshaySingh Log off
Product Management									
Company	Domain	Product	Q	Price	Quantity	SKU	Status	Order Status	PurchasedOn
Ankit Corp	07062018testingUK	Office 365 Enterprise E1	£ 5.58	1	SK4663	⊗	⊗	07/Jun/18	✓
Tech Data	S1QAUKPROD612fake	Office 365 Business Essentials	£ 3.49	2	SK4660	⊗	⊗	12/Jun/18	✓
Tech Data	testing4080094	Exchange Online Protection	£ 0.70	0	SK5280	⊗	⊗	28/Jun/18	✓
Tech Data	testing15062018	Exchange Online Protection	£ 0.70	0	SK5280	⊗	⊗	15/Jun/18	✓


A table will show the below information.

- **Company:** Company name
- **Domain:** Domain of the order
- **Product:** Product name
- **Price :** Cost price of product for the end-user
- **Quantity:** Number of seats
- **Reseller PO:** Reseller purchase order
- **SKU:** Manufacture part number
- **Status:** Product status (please hover your mouse to see the status)
- **Order Status:** Sales order status (please hover your mouse to see the status)
- **Purchased On:** Order placing date
- There is Edit icon (  ) on the right which allows for seat modification.

## Order Details Page

1. Click on the edit icon 



2. Click on (+) or (–) to increase or decrease the number of seats
3. Click on save
4. Wait for the page to refresh automatically with the seat count pulled from StreamOne or click on the **refresh button** 

## Email Notification

On every seat modification, an email will be sent to the customer and the app user



## Application Requirements

Minimal prerequisites to run the application on Azure are:

1. SQL database recommended: Basic tier single database (5 DTU)
2. App services pack: D1, shared tier

## Application configuration

Below are the configuration page settings that are preinstalled in the application. These settings can be edited from the application configuration page.

### Configuration Page URL

<https://Domain.azurewebsites.net/configuration>

App API Configuration Fields	
1. SOIN	<i>(Provided by Tech Data)</i>
2. Client-id	<i>(Provided by Tech Data)</i>
3. Client Secret	<i>(Provided by Tech Data)</i>

There are a few things that you must be aware of that may become useful when using this application:

- **App URL:** The URL that will be shared in the notification email inviting the end user to visit your website
- **Allowed Reseller:** Emails of admin users. Must be separated by commas (,)
- **Reseller Name:** Customisation configuration
- **Application Name:** Customisation of the name on the app title and email

## Microsoft Azure Cost Estimates

Service type	Description	Estimated Cost
SQL Database	Single Database, Basic tier, B level, 5 DTUs, 2 GB storage per DB	€4,21
App Service	1 instance(s) x 1 Months, Size: D1, Shared tier	€37,57
		€41,78/Month