



Customer Portal SDK- StreamOne User Manual

Content

AboutApplication.....3

Login Screens5

Customer Portal.....7

Settings7

Add App User 8

Sales Order Mapping 10

Price Management 12

Order Details Page.....

End User Portal 14

Order Details Page.....15

Email Notification 15

Application Requirements16

Application Configuration16

Microsoft Azure Cost Estimates 17

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.

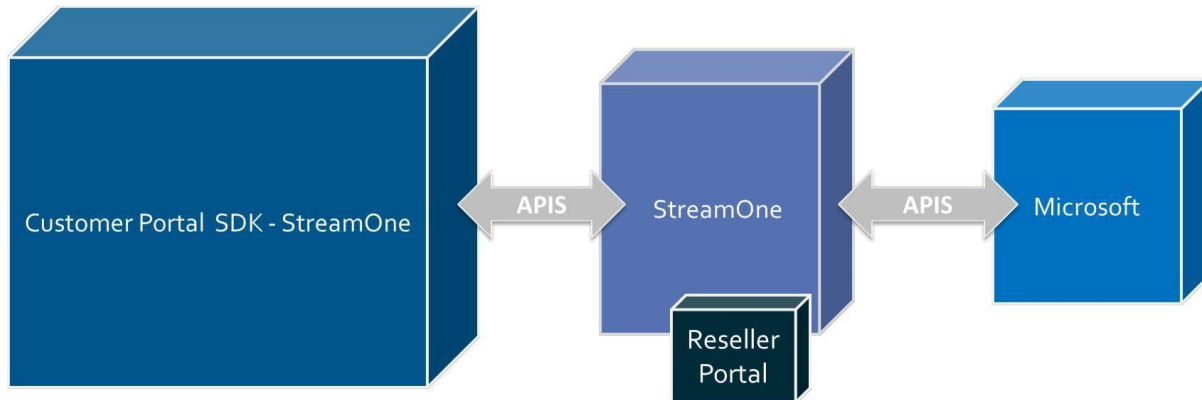
The Customer Portal does not replace StreamOne but offers an alternative environment for seat modification.

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?

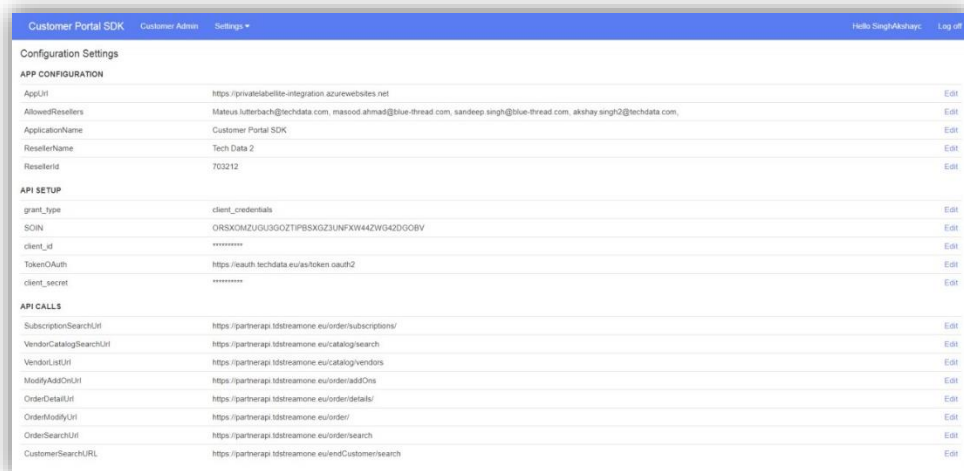


We believe by the time you read this document you will have completed the setup and hosting and have the site running with your customized URL. An example of this URL is:

<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>

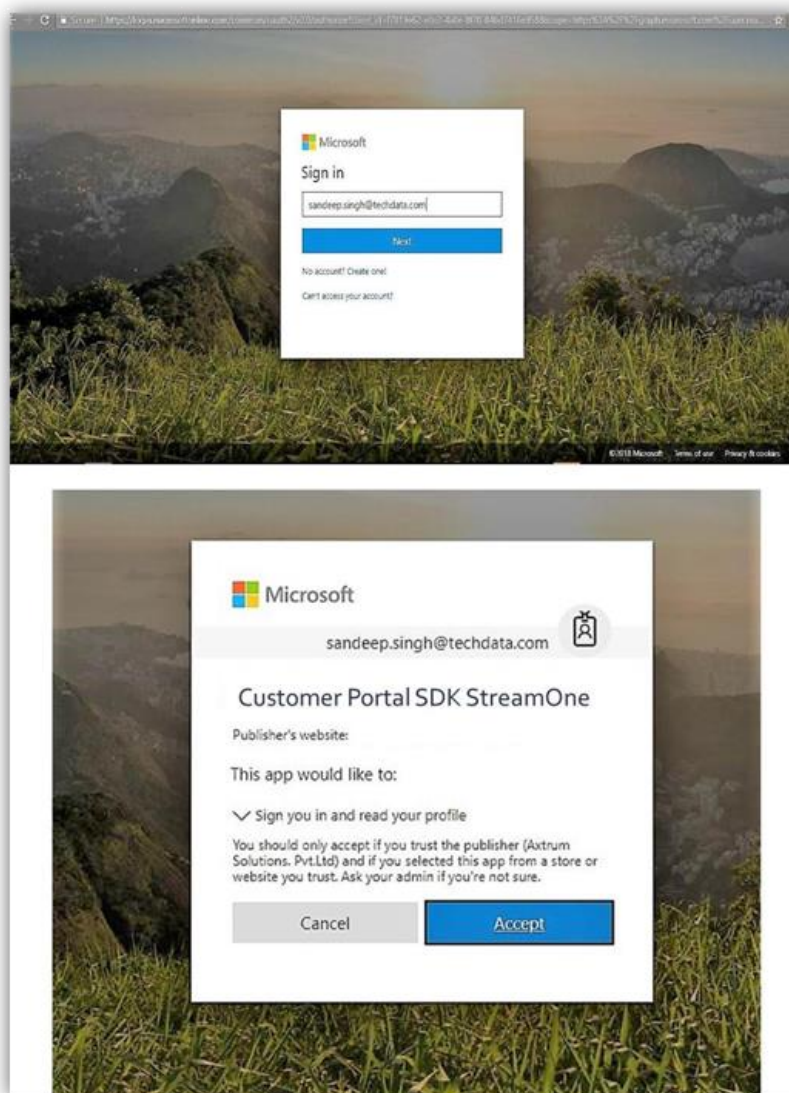


Configuration Settings		
APP CONFIGURATION		
AppUrl	https://privatelabelintegration.azurewebsites.net	Edit
AllowedResellers	Mattus.luterbach@techdata.com, masood.ahmad@blue-thread.com, sandeep.singh@blue-thread.com, akshay.singh@techdata.com,	Edit
ApplicationName	Customer Portal SDK	Edit
ResellerName	Tech Data 2	Edit
ResellerId	703212	Edit
API SETUP		
grant_type	client_credentials	Edit
SCOPE	ORSXOMZUGUOGQZTPBSXGZJUNFXW44ZWG42DGO8V	Edit
client_id	*****	Edit
TokenOAuth	https://auth.techdata.eu/es/token/oauth2	Edit
client_secret	*****	Edit
API CALLS		
SubscriptionSearchUrl	https://partnerapi.tdsstreamone.eu/order/subscriptions/	Edit
VendorCatalogSearchUrl	https://partnerapi.tdsstreamone.eu/catalog/search/	Edit
VendorListUrl	https://partnerapi.tdsstreamone.eu/catalog/vendors	Edit
ModifyAddOnUrl	https://partnerapi.tdsstreamone.eu/order/addOns	Edit
OrderDetailsUrl	https://partnerapi.tdsstreamone.eu/order/details/	Edit
OrderModifyUrl	https://partnerapi.tdsstreamone.eu/order/	Edit
OrderSearchUrl	https://partnerapi.tdsstreamone.eu/order/search	Edit
CustomerSearchUrl	https://partnerapi.tdsstreamone.eu/endCustomer/search	Edit

Note- For more details please check the “Application Configuration” section of this document

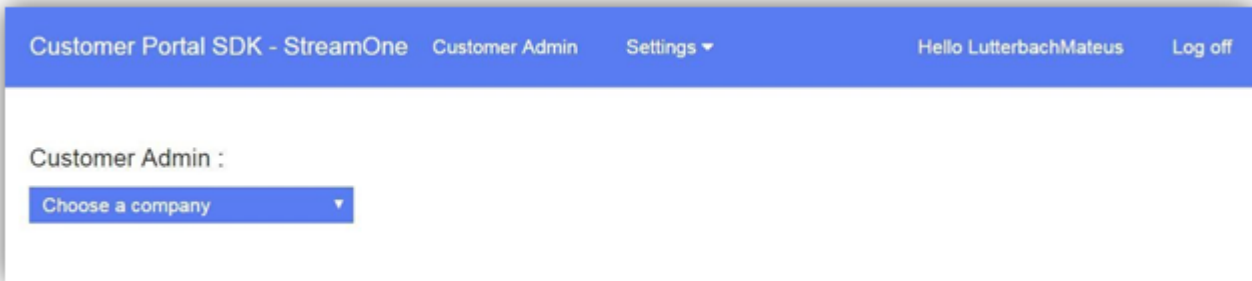
Login Screens

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 licenses 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](#)

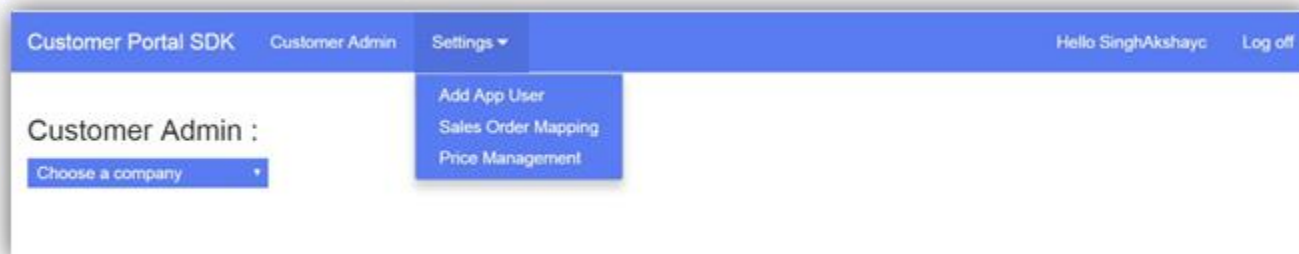
Create a user by adding a new email to access the app and link this email to a Company Name. To control the visibility those users, have of their sales orders and their products you should go to:

[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.

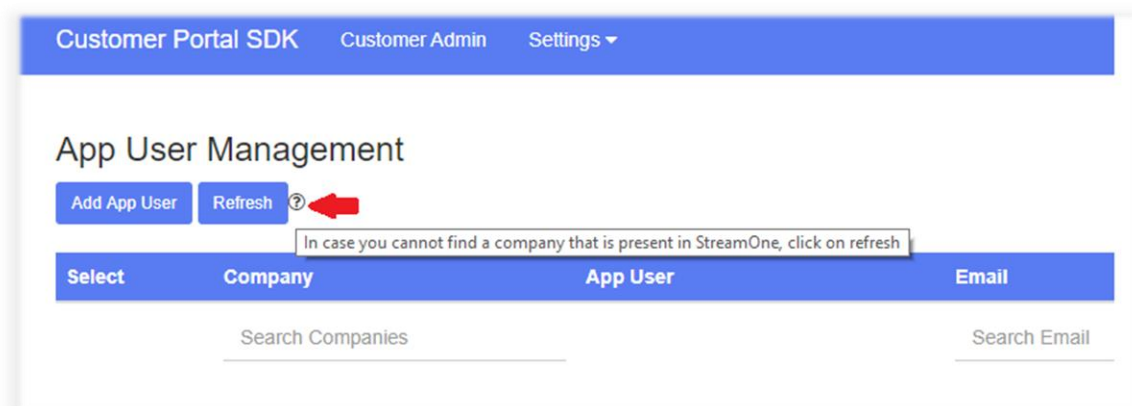
By clicking Add App User you will be directed to the app user management page where you can assign a company to the end user.

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



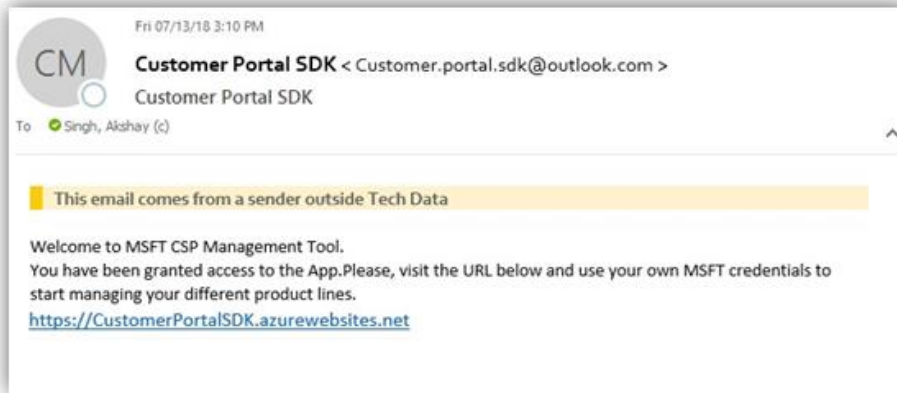
The screenshot shows the 'App User Management' interface. At the top is a navigation bar with 'Customer Portal SDK', 'Customer Admin', and 'Settings' (with a dropdown arrow). Below the navigation bar is the title 'App User Management'. There are two buttons: 'Add App User' and 'Refresh'. A red arrow points to the 'Refresh' button, which has a question mark icon next to it. A tooltip box is visible over the 'Refresh' button with the text: 'In case you cannot find a company that is present in StreamOne, click on refresh'. Below the buttons is a table with columns: 'Select', 'Company', 'App User', and 'Email'. Under the 'Company' column, there is a search bar labeled 'Search Companies'. Under the 'Email' column, there is a search bar labeled 'Search Email'.

3. Provide the following information:
 - a. Company
 - b. Name
 - c. Email



The screenshot shows the 'Add App User' modal form. It has a blue header bar with the title 'Add App User' and a close button (X). The form contains three input fields: 'Company', 'Name', and 'Email'. At the bottom right of the form are two buttons: 'Cancel' and 'Add'.

- An email notification will be sent to the user immediately



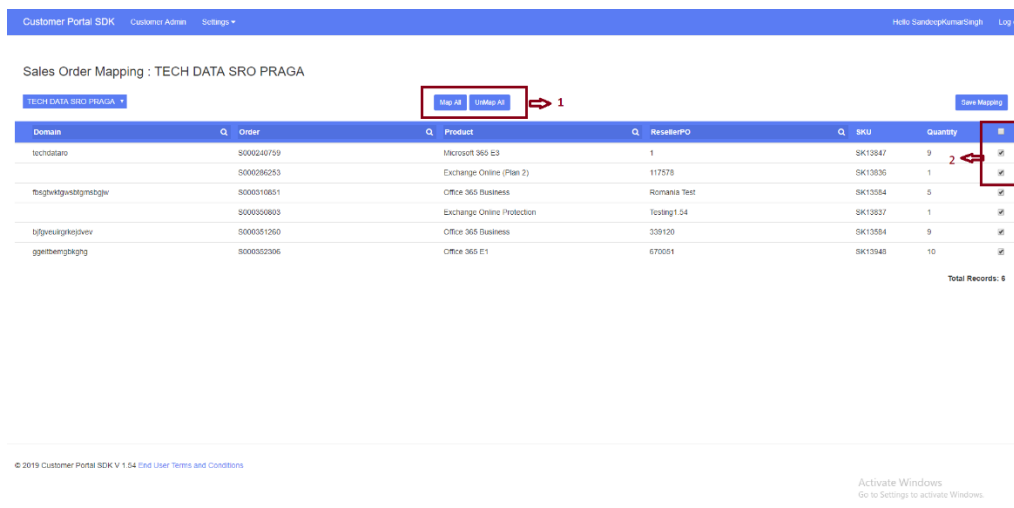
Delete a user

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.

- Click Settings > Sales Order Mapping



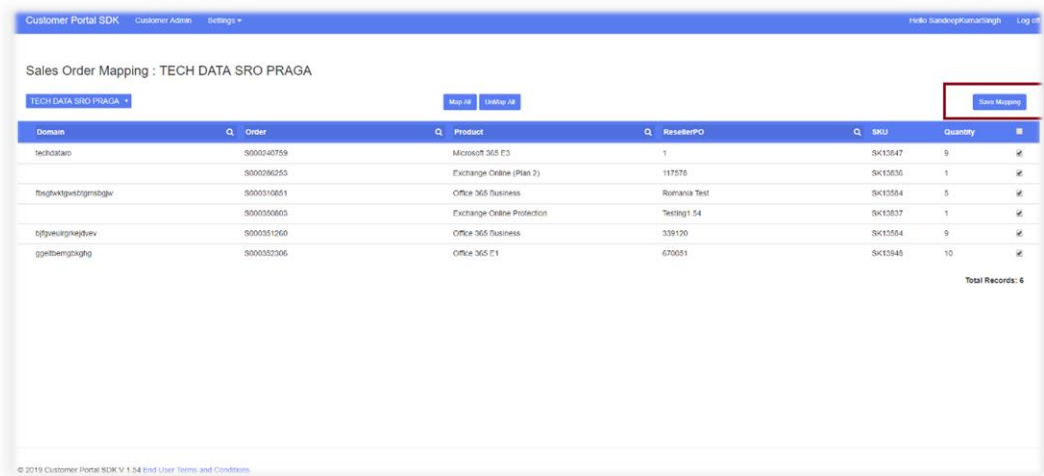
Domain	Order	Product	ResellerPO	SKU	Quantity	
techdata	S000240759	Microsoft 365 E3	1	SK13847	9	2
	S000296253	Exchange Online (Plan 2)	117578	SK13836	1	
thealthwingszigmagiv	S000310851	Office 365 Business	Romania Test	SK13584	5	
	S000300803	Exchange Online Protection	Testing1.04	SK12827	1	
tpfveurkgejv	S000581260	Office 365 Business	339120	SK13584	9	
ggethermykghj	S000302306	Office 365 E1	670051	SK13948	10	

Total Records: 6

- Choose Company to map any CSP license to that company:

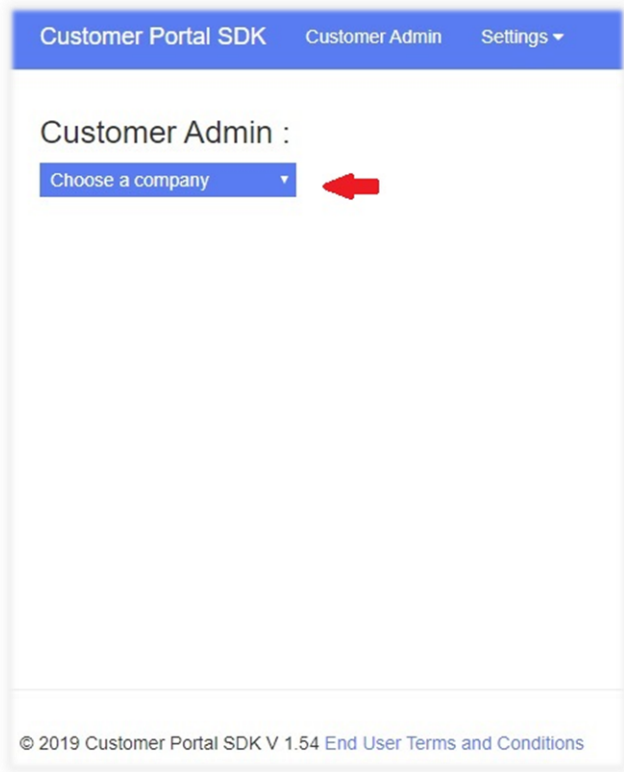
- a. Option 1 can be used to Map/Un-Map all the CSP License to the selected company.
- b. Option 2 Can be used to do mapping for each CSP Licenses on respective page

3. Click Save Mapping

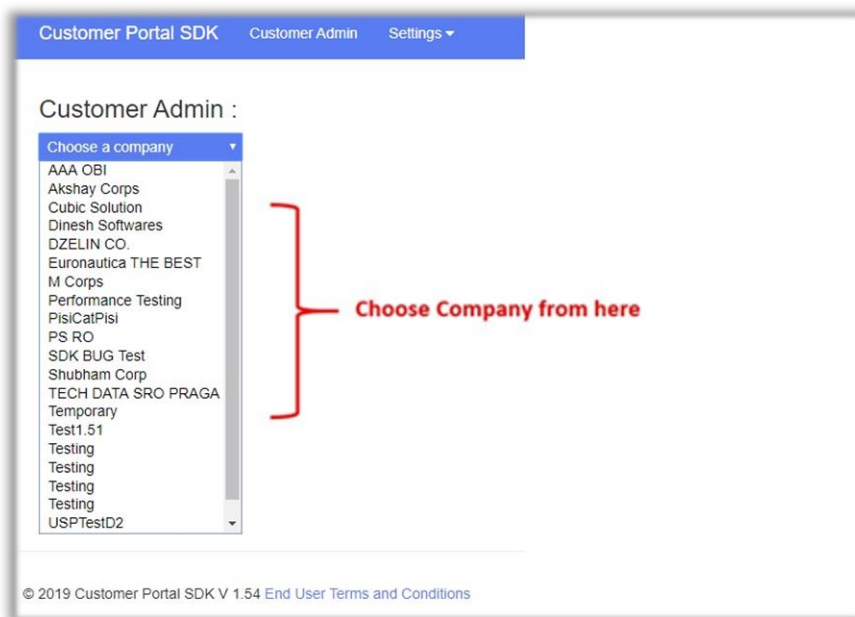


Important: There are certain functionalities you must be aware of in this section of the application.

Customer Admin




To see CSP Licenses please choose company from the dropdown list:



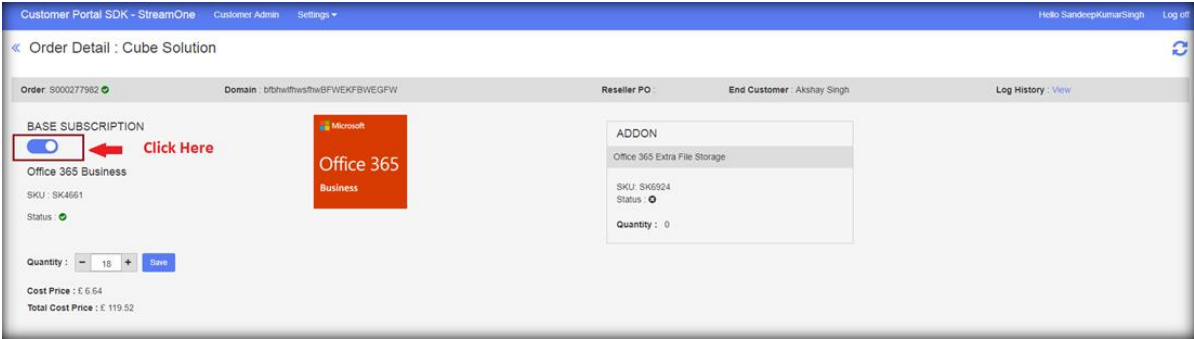
A table will show the below information

- **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

Activation and Suspension option available along with the Product Images



Customer Portal SDK Customer Admin Settings Hello SandeepKumarSingh Log off

Customer Admin : TECH DATA SRO PRAGA

TECH DATA SRO PRAGA

Domain	Product	Cost Price	Sales Price	Quantity	ResellerPO	SKU	Status	Order	Order Status	PurchasedOn
techdataro	Microsoft 365 E3	lei 118.19		9	1	SK13847	●	S000240759	●	19/Jun/18
	Exchange Online (Plan 2)	lei 27.05		1	117578	SK13836	●	S000286253	●	31/Dec/18
bfbgwtkgwzblgmsbgjw	Office 365 Business	lei 7.60		5	Romania Test	SK13584	●	S000310851	●	26/Mar/19
	Exchange Online Protection	lei 3.41		1	Testing1.54	SK13637	●	S000350803	●	22/Aug/19
bfbgveurgkzjydvw	Office 365 Business	lei 35.96		9	339120	SK13584	●	S000351260	●	26/Aug/19
ggntbmgkghg	Office 365 E1	lei 27.46		10	670051	SK13948	●	S000352306	●	29/Aug/19

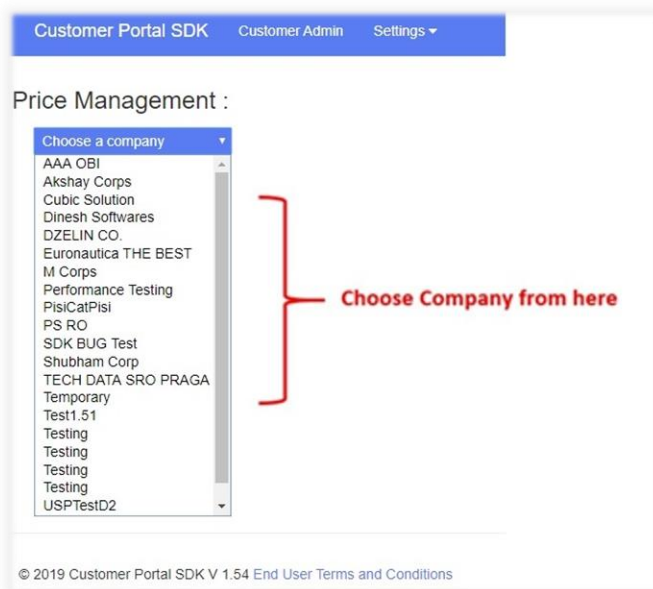
Total Records: 6

© 2019 Customer Portal SDK V 1.54 End User Terms and Conditions

Price Management

Using this option sets the following:

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



Customer Portal SDK Customer Admin Settings ▾

Price Management :

Choose a company ▾

- AAA OBI
- Akshay Corps
- Cubic Solution
- Dinesh Softwares
- DZELIN CO.
- Euronautica THE BEST
- M Corps
- Performance Testing
- PisiCatPisi
- PS RO
- SDK BUG Test
- Shubham Corp
- TECH DATA SRO PRAGA
- Temporary
- Test1.51
- Testing
- Testing
- Testing
- Testing
- USPTestD2

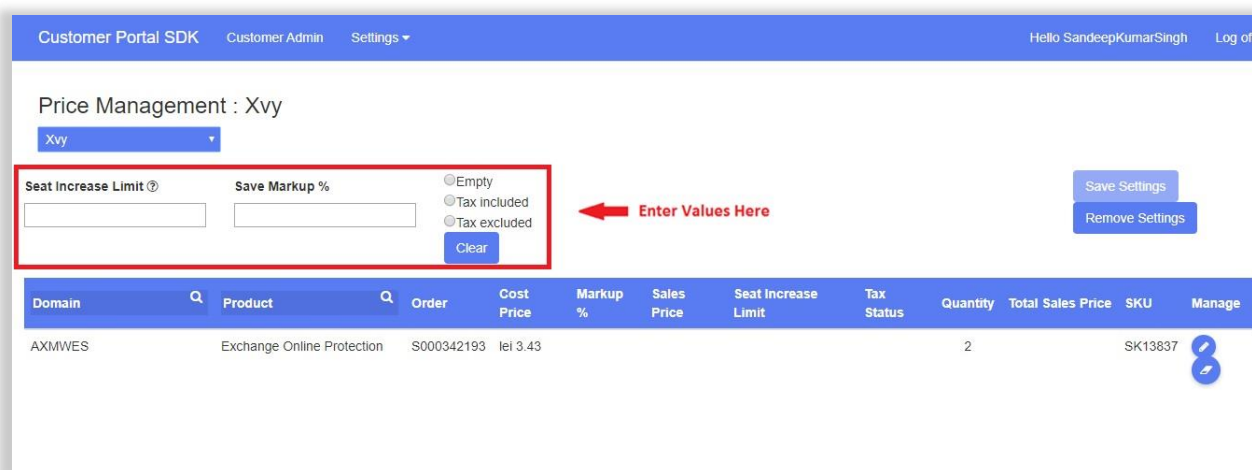
Choose Company from here

© 2019 Customer Portal SDK V 1.54 End User Terms and Conditions

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'



Customer Portal SDK Customer Admin Settings ▾ Hello SandeepKumarSingh Log off

Price Management : Xvy

Xvy ▾


Seat Increase Limit ⓘ Save Markup %

☐ Empty ☐ Tax included ☐ Tax excluded



Clear

Enter Values Here

Save Settings Remove Settings

Domain	Product	Order	Cost Price	Markup %	Sales Price	Seat Increase Limit	Tax Status	Quantity	Total Sales Price	SKU	Manage
AXIMWES	Exchange Online Protection	S000342193	lei 3.43					2		SK13837	

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' 
- Step 4: Enter the values and click on the save icon 


Customer Portal SDK Customer Admin Settings ▾ Hello SandeepKumarSingh Log off

Price Management : TECH DATA SRO PRAGA
TECH DATA SRO PRAGA ▾

Seat Increase Limit ⓘ Save Markup %
☐ Empty
☐ Tax included
☐ Tax excluded

Enter Values Here

Click Here

Domain	Q	Product	Q	Order	Cost Price	Markup %	Sales Price	Seat Increase Limit	Tax Status	Quantity	Total Sales Price	SKU	Manage
techdataaro		Microsoft 365 E3		S000240759	lei 118.19	<input type="text"/>	<input type="text"/>	22		9		SK13847	
		Exchange Online (Plan 2)		S000286253	lei 27.05					1		SK13836	
fbgshktgvsbtgmsbgjw		Office 365 Business		S000310851	lei 7.60					5		SK13584	
		Exchange Online Protection		S000350803	lei 3.41					1		SK13837	
bfjgveuirgkejdev		Office 365 Business		S000351260	lei 35.96					9		SK13584	
ggeltbmrgbkghg		Office 365 E1		S000352306	lei 27.46					10		SK13948	

Total Records: 6

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 view.

Customer Portal SDK Customer Admin Settings ▾ Hello SandeepKumarSingh Log off

Price Management : TECH DATA SRO PRAGA
TECH DATA SRO PRAGA ▾

Seat Increase Limit ⓘ Save Markup %
☐ Empty
☐ Tax included
☐ Tax excluded

Click Here

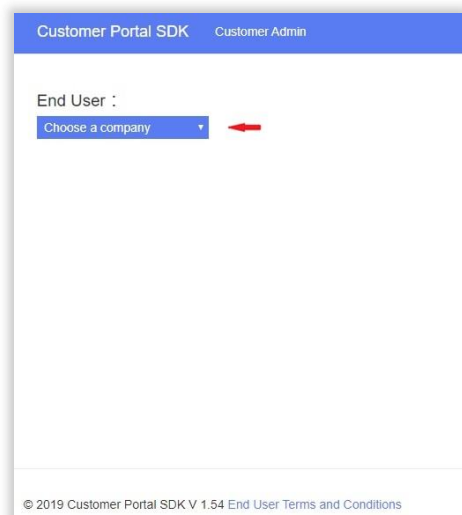
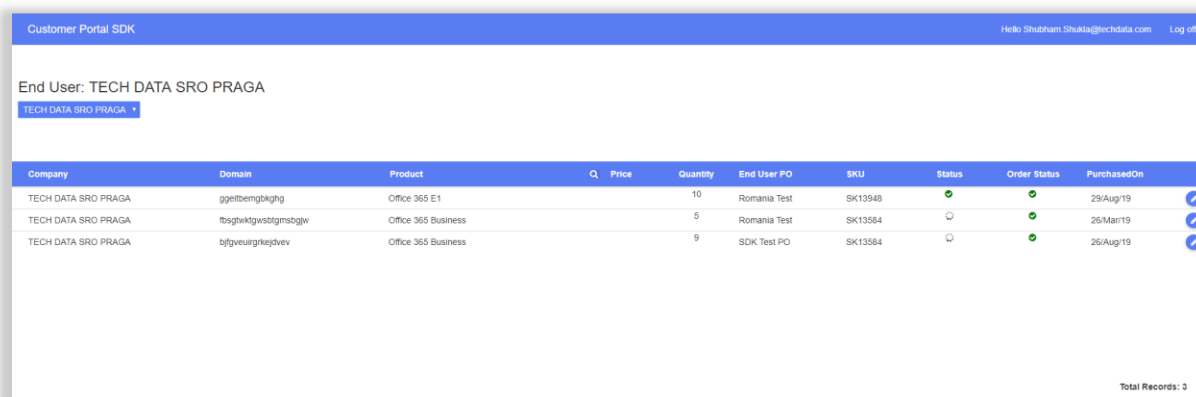
Domain	Q	Product	Q	Order	Cost Price	Markup %	Sales Price	Seat Increase Limit	Tax Status	Quantity	Total Sales Price	SKU	Manage
techdataaro		Microsoft 365 E3		S000240759	lei 118.19	<input type="text"/>	<input type="text"/>	22		9		SK13847	
		Exchange Online (Plan 2)		S000286253	lei 27.05					1		SK13836	
fbgshktgvsbtgmsbgjw		Office 365 Business		S000310851	lei 7.60					5		SK13584	
		Exchange Online Protection		S000350803	lei 3.41					1		SK13837	
bfjgveuirgkejdev		Office 365 Business		S000351260	lei 35.96					9		SK13584	
ggeltbmrgbkghg		Office 365 E1		S000352306	lei 27.46					10		SK13948	

Total Records: 6

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.

Choose a Company from the list.

Company	Domain	Product	Q	Price	Quantity	End User PO	SKU	Status	Order Status	PurchasedOn
TECH DATA SRO PRAGA	ggelbembghghg	Office 365 E1			10	Romania Test	SK13948	✓	✓	29/Aug/19
TECH DATA SRO PRAGA	fbaghwkgtwbtgmsbgle	Office 365 Business			5	Romania Test	SK13584	⌚	✓	26/Mar/19
TECH DATA SRO PRAGA	bfgveuirgkjsdjev	Office 365 Business			9	SDK Test PO	SK13584	⌚	✓	26/Aug/19


A table will show the below information.

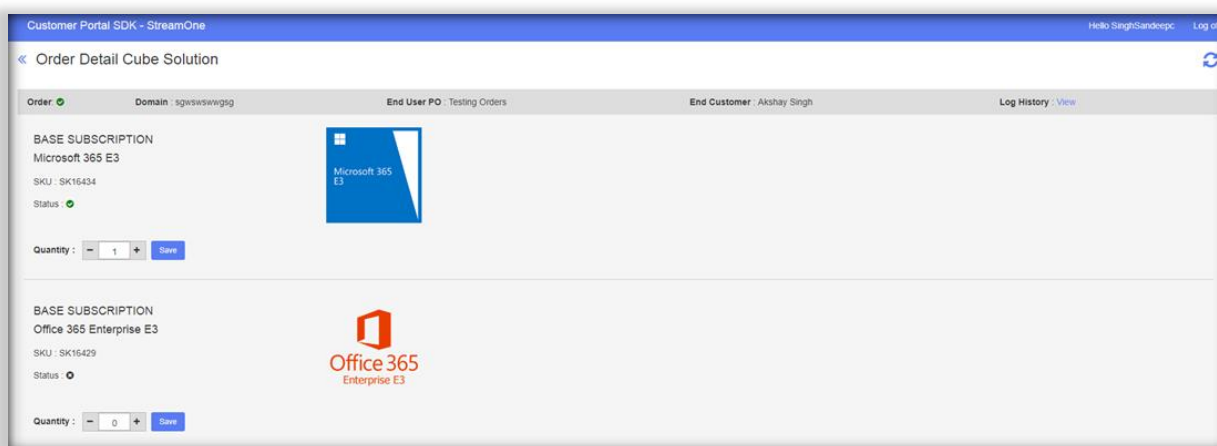
- **Company:** Company name
- **Domain:** Domain of the order
- **Product:** Product name
- **Price:** Cost price of product for the end-user
- **Quantity:** Number of seats
- **End User PO:** Enduser purchase order
- **SKU:** Manufacture part number
- **Status:** Product status (please hover your mouse 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: F1, 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	(Provided by Tech Data)
2. Client- ID	(Provided by Tech Data)
3. Client Secret	(Provided by Tech Data)

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

PREREQUISITES

- Customer Portal SDK StreamOne License Terms
- Partner API credentials
- Azure account
- Azure CSP subscription
- Microsoft account for login
- Partner resources to maintain it on Azure

AZURE PRODUCTS COMBINATION



App Service

Free Tier, F1. 1 GB RAM, 1 GB Storage



Azure SQL Database

Single DB, Basic Tier. 5 DTUs, 2, 2 GB

COST ESTIMATION



~USD 4,90/month List Price (VAT Excluded)