



## 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.

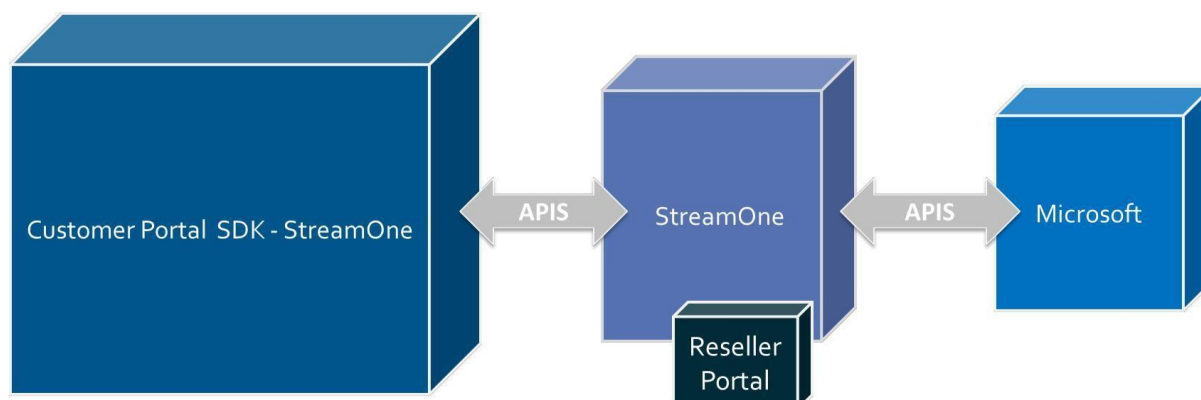
The Customer Portal does not replace StreamOne but offers an alternative environment for seat modification.

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?

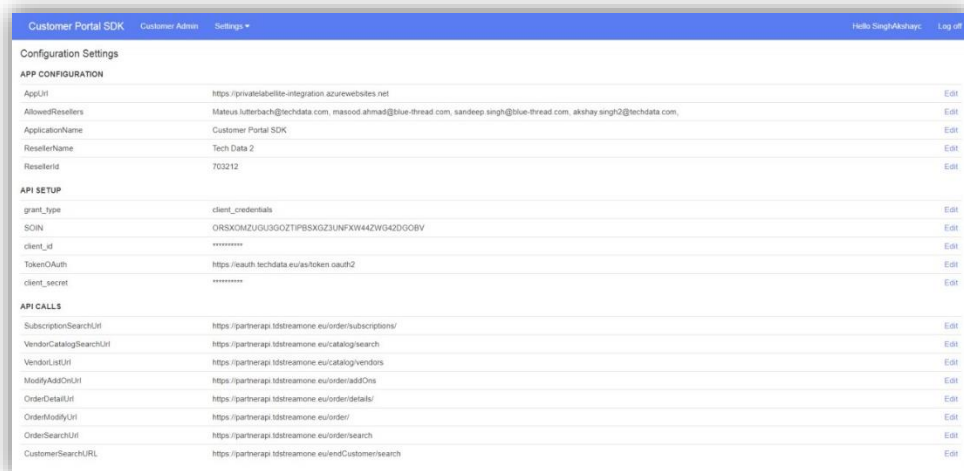


We believe by the time you read this document you will have completed the setup and hosting and have the site running with your customized URL. An example of this URL is:

<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>

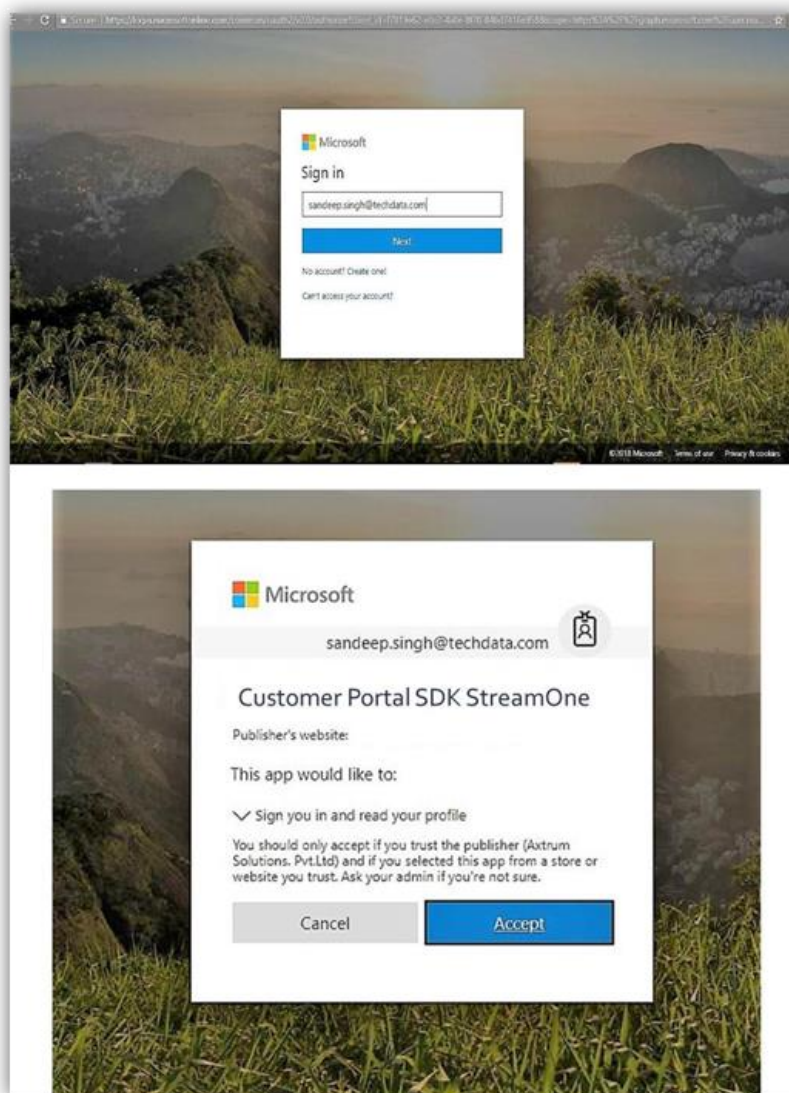


Customer Portal SDK - Configuration Settings		
<b>APP CONFIGURATION</b>		
AppUrl	https://privatelabelintegration.azurewebsites.net	Edit
AllowedResellers	Mateus.luterbach@techdata.com, masood.ahmad@blue-thread.com, sandeep.singh@blue-thread.com, akshay.singh@techdata.com,	Edit
ApplicationName	Customer Portal SDK	Edit
ResellerName	Tech Data 2	Edit
ResellerId	703212	Edit
<b>API SETUP</b>		
grant_type	client_credentials	Edit
SCOPE	ORSXOMZUOLUOQZTPB5XGZJUNFXW44ZWG42DGO8V	Edit
client_id	*****	Edit
TokenOAuth	https://auth.techdata.eu/es/token/oauth2	Edit
client_secret	*****	Edit
<b>API CALLS</b>		
SubscriptionSearchUrl	https://partnerapi.tdsstreamone.eu/order/subscriptions/	Edit
VendorCatalogSearchUrl	https://partnerapi.tdsstreamone.eu/catalog/search/	Edit
VendorListUrl	https://partnerapi.tdsstreamone.eu/catalog/vendors	Edit
ModifyAddOrUrl	https://partnerapi.tdsstreamone.eu/order/addOrs	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

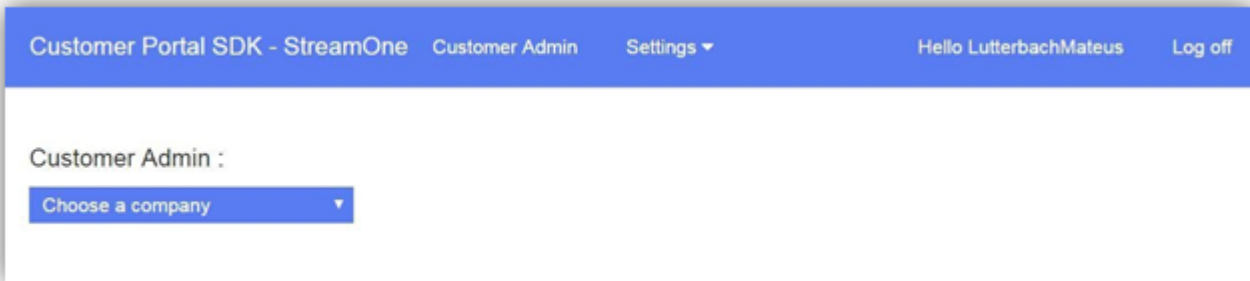
## Login Screens

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.

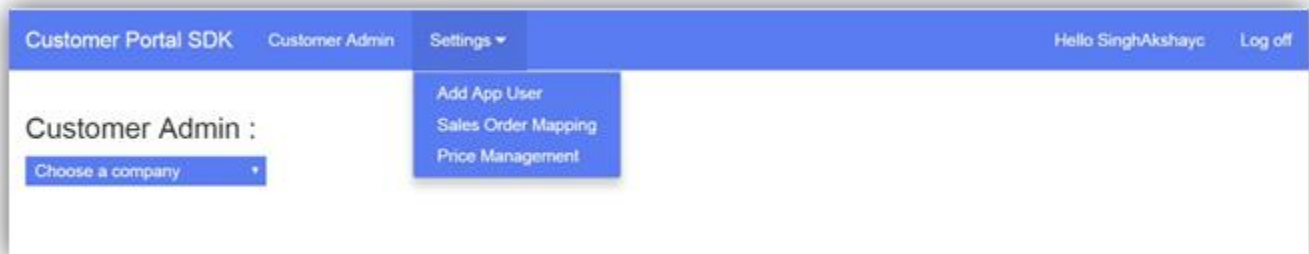
To add users, you should go to:

### [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

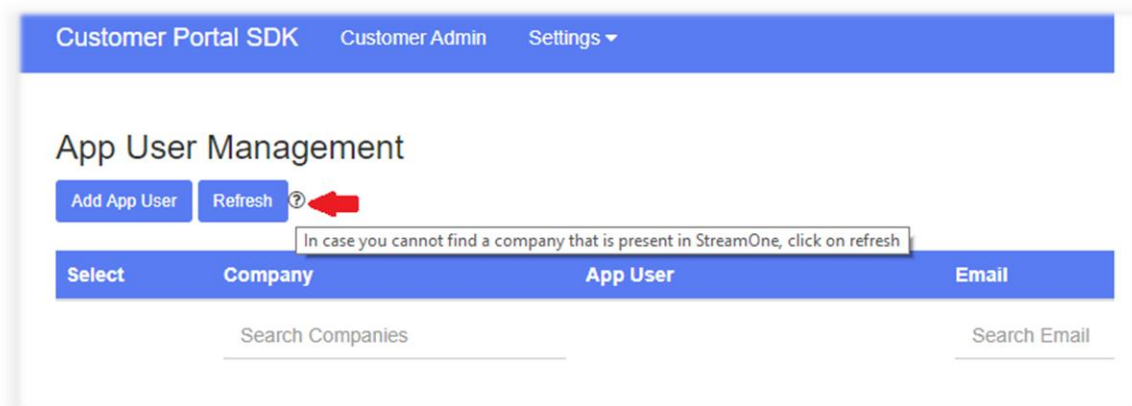
## Add App User

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;



The screenshot shows the 'App User Management' page. At the top, there is a navigation bar with 'Customer Portal SDK', 'Customer Admin', and 'Settings' (with a dropdown arrow). Below the navigation bar, the title 'App User Management' is displayed. Under the title, there are two buttons: 'Add App User' and 'Refresh'. A red arrow points to the 'Refresh' button, and a tooltip message says 'In case you cannot find a company that is present in StreamOne, click on refresh'. Below the buttons is a table with the following structure:

Select	Company	App User	Email
<input type="text" value="Search Companies"/>		<input type="text" value="Search Email"/>	

### Add a user

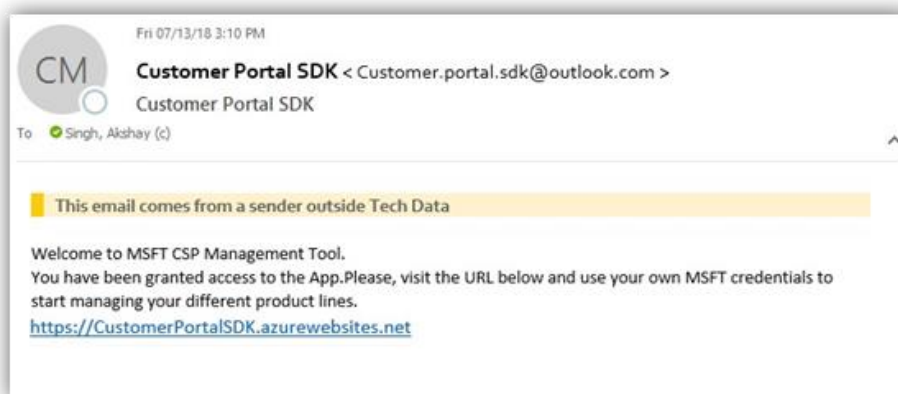
1. Click Settings > Add App User
2. Click "Refresh" before you proceed in case you do not see a particular company listed
3. Provide the following information:
  - a. Company
  - b. Name
  - c. Email





The 'Add App User' dialog box features a blue header with a close button (X) in the top right corner. Below the header, there are three text input fields labeled 'Company', 'Name', and 'Email'. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Add'.

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



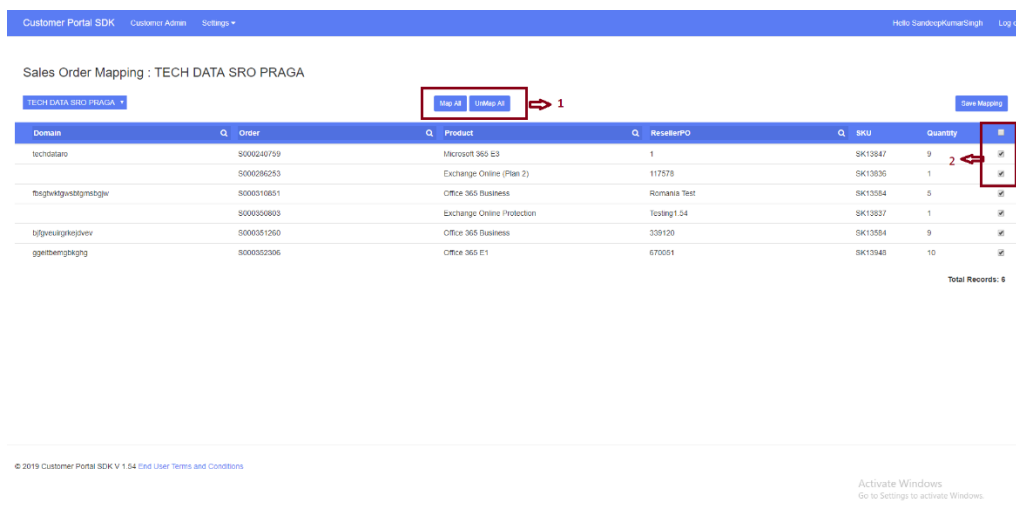
### Delete a user

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.

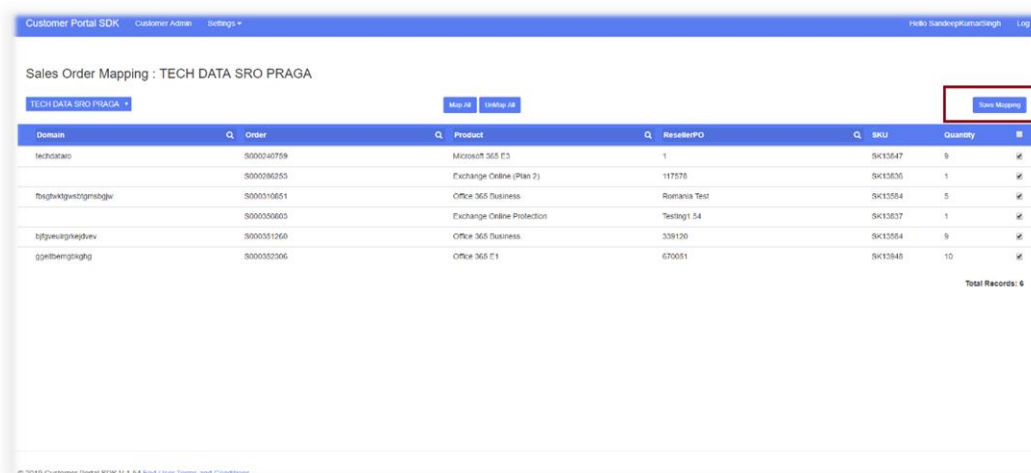
1. Click Settings > Sales Order Mapping



Domain	Q	Order	Q	Product	Q	ResellerPO	Q	SKU	Quantity	
techdataro		5000240759		Microsoft 365 E3		1		SK13847	9	<input checked="" type="checkbox"/>
		500036253		Exchange Online (Plan 2)		117578		SK13836	1	<input checked="" type="checkbox"/>
fbaghwkgvstzgrmsbgiv		5000310651		Office 365 Business		Romania Test		SK13584	5	<input checked="" type="checkbox"/>
		5000359803		Exchange Online Protection		Testing1.04		SK13837	1	<input checked="" type="checkbox"/>
bfjpevgraghejv		5000351260		Office 365 Business		339120		SK13584	9	<input checked="" type="checkbox"/>
ggelbmrgkghg		5000352306		Office 365 E1		670051		SK13848	10	<input checked="" type="checkbox"/>

Total Records: 6

2. Choose Company to map any CSP license to that company:
  - a. Option 1 can be used to Map/Un-Map all the CSP Licenses to the selected company.
  - b. Option 2 Can be used to do mapping for each CSP Licenses on respective page
3. Click Save Mapping

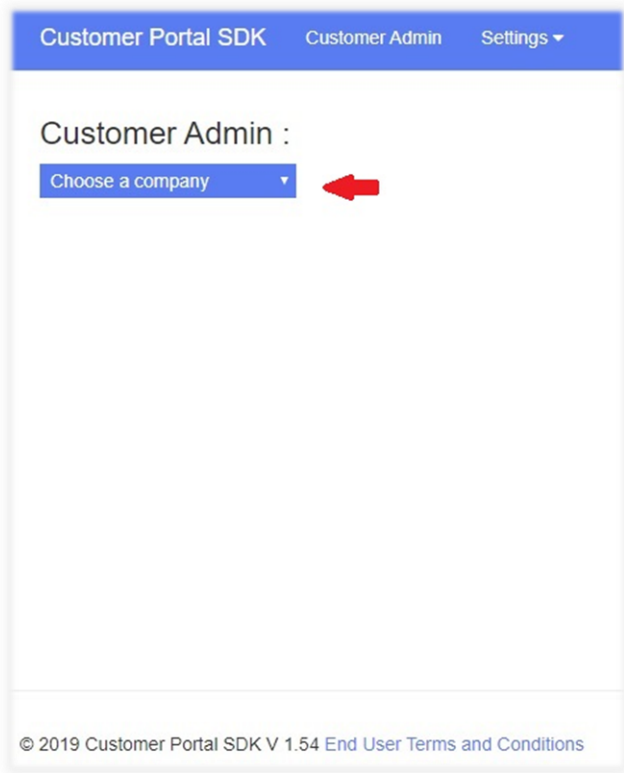


Domain	Q	Order	Q	Product	Q	ResellerPO	Q	SKU	Quantity	
techdataro		5000240759		Microsoft 365 E3		1		SK13847	9	<input checked="" type="checkbox"/>
		500036253		Exchange Online (Plan 2)		117578		SK13836	1	<input checked="" type="checkbox"/>
fbaghwkgvstzgrmsbgiv		5000310651		Office 365 Business		Romania Test		SK13584	5	<input checked="" type="checkbox"/>
		5000359803		Exchange Online Protection		Testing1.04		SK13837	1	<input checked="" type="checkbox"/>
bfjpevgraghejv		5000351260		Office 365 Business		339120		SK13584	9	<input checked="" type="checkbox"/>
ggelbmrgkghg		5000352306		Office 365 E1		670051		SK13848	10	<input checked="" type="checkbox"/>

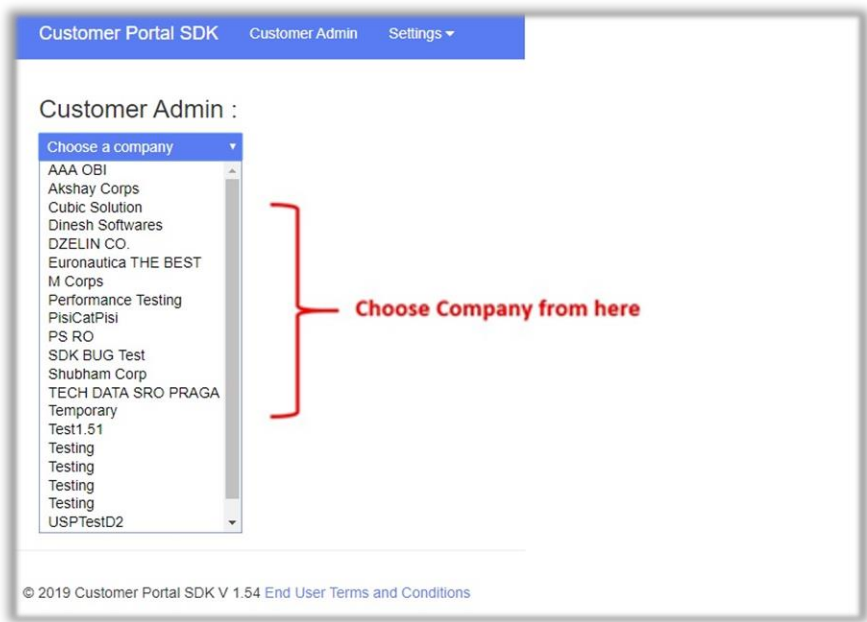
Total Records: 6

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

Customer Admin




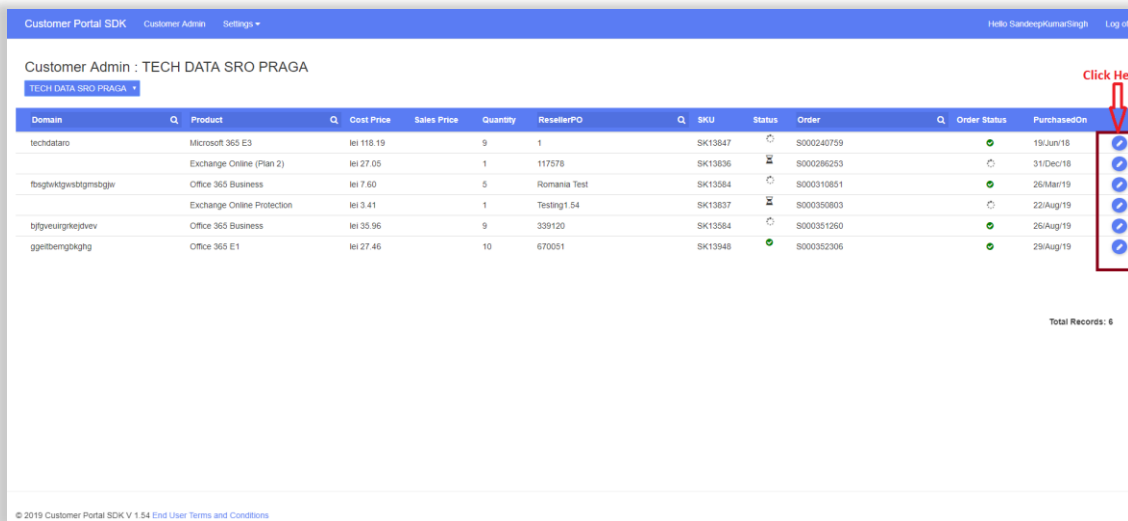
To see CSP Licenses please choose company from the dropdown list:



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.



Customer Portal SDK Customer Admin Settings Hello SandeepKumarSingh Log off

Customer Admin : TECH DATA SRO PRAGA

TECH DATA SRO PRAGA

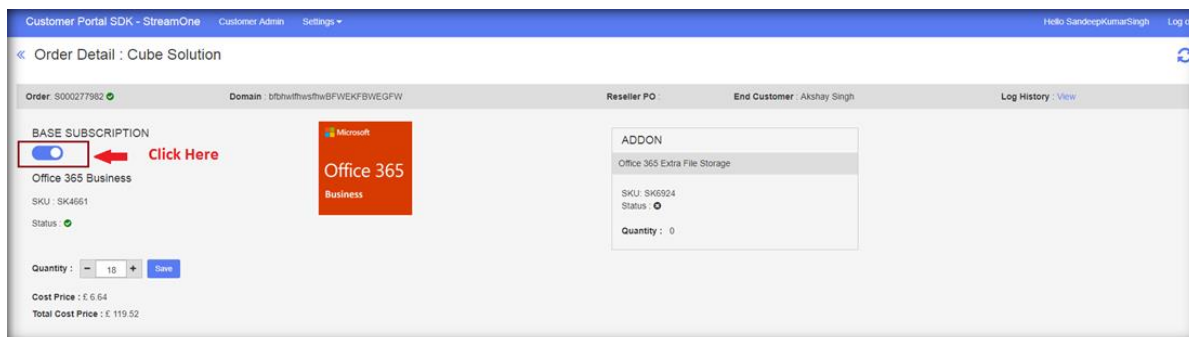
Domain	Q	Product	Q	Cost Price	Sales Price	Quantity	ResellerPO	Q	SKU	Status	Order	Q	Order Status	PurchasedOn	
techdataro		Microsoft 365 E3	lei 118.19			9	1		SK13847		S000240759			19/Jun/18	
		Exchange Online (Plan 2)	lei 27.05			1	117578		SK13836		S000286253			31/Dec/18	
ftslghvkgstbgtmsbglw		Office 365 Business	lei 7.60			5	Romania Test		SK13584		S000310851			26/Mar/19	
		Exchange Online Protection	lei 3.41			1	Testing1.54		SK13837		S000350803			22/Aug/19	
bfjgveurghkjediv		Office 365 Business	lei 35.96			9	339120		SK13584		S000351260			26/Aug/19	
ggelbmgkghg		Office 365 E1	lei 27.46			10	670051		SK13948		S000352306			29/Aug/19	

Total Records: 6

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## Order Details Page

Activation and Suspension option available along with the Product Images



Customer Portal SDK - StreamOne Customer Admin Settings Hello SandeepKumarSingh Log off

Order Detail : Cube Solution


Order: S000277982 Domain: pbhwtthstfwbFWKFBWEGFW Reseller PO: End Customer: Akshay Singh Log History: View

BASE SUBSCRIPTION

☒ Click Here

Office 365 Business

SKU: SK4661

Status: 

Quantity:  Save

Cost Price : £ 6.64


Total Cost Price : £ 119.52

Microsoft Office 365 Business

ADDON

Office 365 Extra File Storage

SKU: SK6924

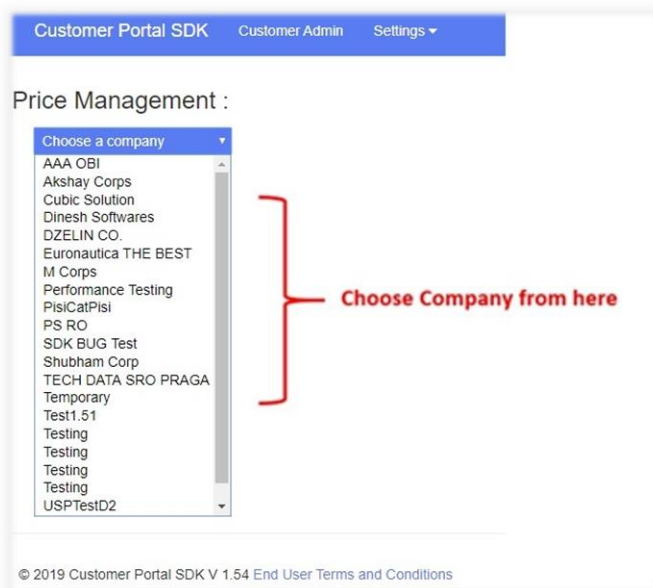
Status: 

Quantity: 0

## 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
- PisicCatPisi
- PS RO
- SDK BUG Test
- Shubham Corp
- TECH DATA SRO PRAGA
- Temporary
- Test1.51
- Testing
- Testing
- Testing
- Testing
- USPTestID2

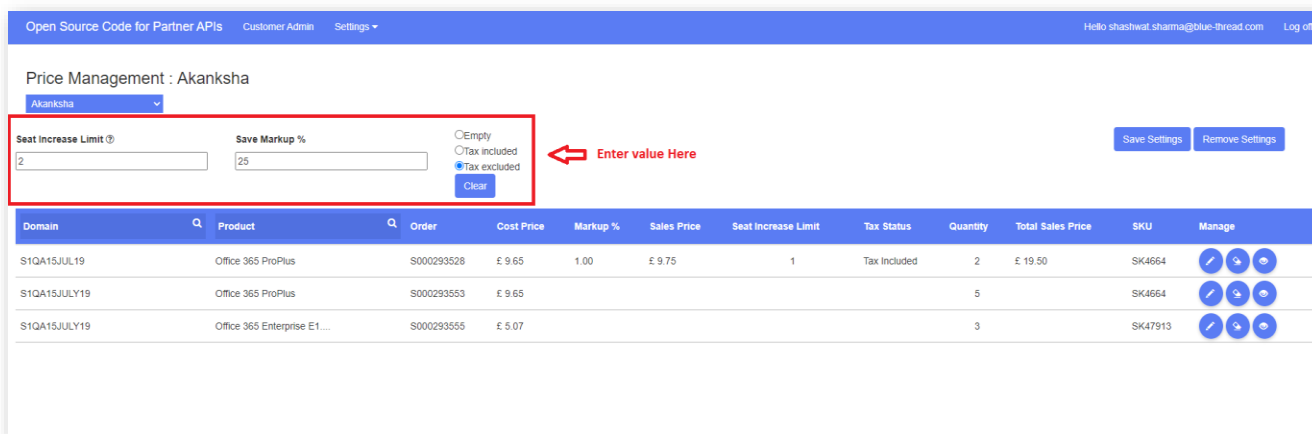
Choose Company from here

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There are three 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'
- Step 3: Select the 'Eye Icon' for Add-ons of particular order or domain



Open Source Code for Partner APIs Customer Admin Settings ▾ Hello shashwat.sharma@blue-thread.com Log off

Price Management : Akanksha




Akanksha ▾

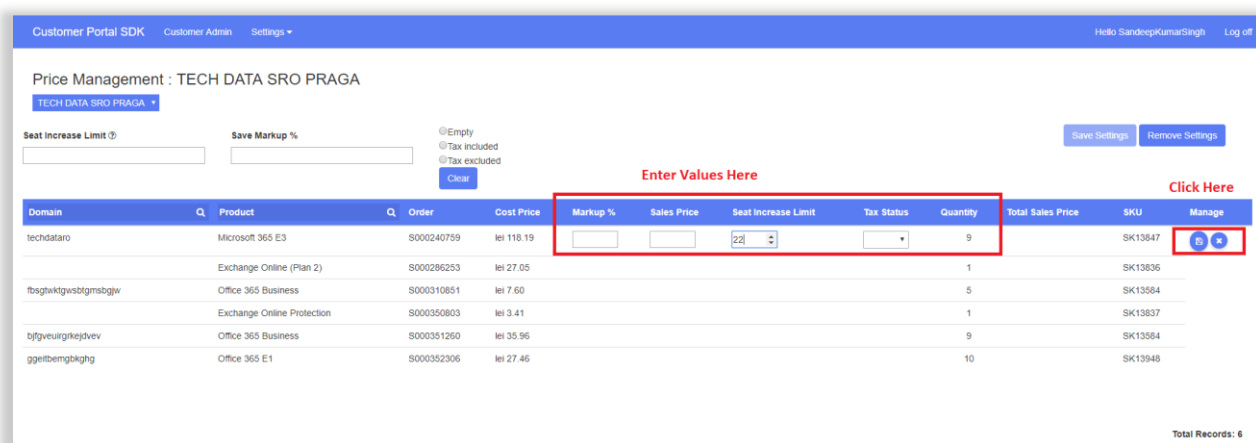
Seat Increase Limit ⓘ  Save Markup %  ☐ Empty ☐ Tax included ☒ Tax excluded

Enter value Here

Domain	Product	Order	Cost Price	Markup %	Sales Price	Seat Increase Limit	Tax Status	Quantity	Total Sales Price	SKU	Manage
S1QA15JUL19	Office 365 ProPlus	S000293528	£ 9.65	1.00	£ 9.75	1	Tax Included	2	£ 19.50	SK4664	
S1QA15JULY19	Office 365 ProPlus	S000293553	£ 9.65					5		SK4664	
S1QA15JULY19	Office 365 Enterprise E1...	S000293555	£ 5.07					3		SK47913	

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' 
- Step 5: you can click on 'Eraser Icon'  to clear values.



Customer Portal SDK Customer Admin Settings ▾ Hello SandeepKumarSingh Log off


Price Management : TECH DATA SRO PRAGA

TECH DATA SRO PRAGA ▾

Seat Increase Limit (0)  Save Markup %


☐ Empty ☐ Tax included ☐ Tax excluded

Enter Values Here

Domain	Product	Order	Cost Price	Markup %	Sales Price	Seat Increase Limit	Tax Status	Quantity	Total Sales Price	SKU	Manage
techdataro	Microsoft 365 E3	S000240759	lei 118.19	<input type="text"/>	<input type="text"/>	22	<input type="text"/>	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	
byfgveurkeyjdev	Office 365 Business	S000351260	lei 35.96					9		SK13584	
ggelbemtgtkghg	Office 365 E1	S000352306	lei 27.46					10		SK13948	

Total Records: 6

c. For Add-ons of 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 column's 'Eye Icon' 

Open Source Code for Partner APIs Customer Admin Settings ▾ Hello shashwat.sharma@blue-thread.com Log off

Price Management : Akanksha

Akanksha ▾

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


Click Here

Domain	Product	Order	Cost Price	Markup %	Sales Price	Seat Increase Limit	Tax Status	Quantity	Total Sales Price	SKU	Manage
S1QA15JUL19	Office 365 ProPlus	S000293528	£ 9.65	1.00	£ 9.75	1	Tax Included	2	£ 19.50	SK4664	
S1QA15JULY19	Office 365 ProPlus	S000293553	£ 9.65					5		SK4664	
S1QA15JULY19	Office 365 Enterprise E1...	S000293555	£ 5.07					3		SK47913	

Enter values Here

Addon Sku	Product	Cost Price	Markup %	Sales Price	Tax Status	Quantity	Total Sales Price	Manage
SK8265	Audio Conferencing	£ 3.00	<input type="text" value="1"/>	<input type="text" value="3.03"/>	<input type="text" value=""/>	1	£ 3.03	
SK12744	Microsoft Stream Plan 2 for Office 365 Add-On	£ 1.26				0		

Total Addons: 2

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

Step 5: you can click on 'Eraser Icon'  to clear values at addon level as well.

**Note:** If there are add-ons present for an order or domain, it will show right below that order or domain (please refer to the above screen shot). Or a pop-up with 'No Add-ons available' will appear.

Open Source Code for Partner APIs Customer Admin Settings ▾ Hello shashwat.sharma@blue-thread.com Log off

Price Management : Akanksha

Akanksha ▾

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

AddOns Alert

No AddOns available

Close

Domain	Product	Order	Cost Price	Markup %	Sales Price	Seat Increase Limit	Tax Status	Quantity	Total Sales Price	SKU	Manage
S1QA15JUL19	Office 365 ProPlus	S000293528	£ 9.65	1.00	£ 9.75	1	Tax Included	2	£ 19.50	SK4664	
S1QA15JULY19	Office 365 ProPlus	S000293553	£ 9.65					5		SK4664	
S1QA15JULY19	Office 365 Enterprise E1...	S000293555	£ 5.07					3		SK47913	
S1QA15JUL1902	Office 365 Enterprise E1...	S000293583	£ 5.07					6		SK47913	

### 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 SDKCustomer AdminSettings

Price Management : TECH DATA SRO PRAGA

TECH DATA SRO PRAGA

Seat Increase Limit 0Save Markup %

Empty

Tax included

Tax excluded

Clear

Save SettingsRemove Settings

Click Here

Domain	Q	Product	Q	Order	Cost Price	Markup %	Sales Price	Seat Increase Limit	Tax Status	Quantity	Total Sales Price	SKU	Manage
techdataro		Microsoft 365 E3		S000240759	lei 118.19			22		9		SK13847	<div><div></div><div></div></div>
		Exchange Online (Plan 2)		S000286253	lei 27.05					1		SK13836	
fbgsktktgwsbtgmsbgw		Office 365 Business		S000310851	lei 7.60					5		SK13584	
		Exchange Online Protection		S000350803	lei 3.41					1		SK13837	
bjfgveurgtkejdjev		Office 365 Business		S000351260	lei 35.96					9		SK13584	
ggelbemtgbkghg		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.

Customer Portal SDKCustomer Admin

End User :

Choose a company

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Customer Portal SDK Hello Shudham Shukla@techdata.com Log off


End User: TECH DATA SRO PRAGA  
[TECH DATA SRO PRAGA](#)

Company	Domain	Product	Q	Price	Quantity	End User PO	SKU	Status	Order Status	PurchasedOn	
TECH DATA SRO PRAGA	ggeltbengbqghg	Office 365 E1			10	Romana Test	SK13948	✓	✓	29/Aug/19	✓
TECH DATA SRO PRAGA	fbaghtkwtstgmsbgle	Office 365 Business			5	Romana Test	SK13584	⊗	✓	26/Mar/19	✓
TECH DATA SRO PRAGA	bjfveuirgkejv	Office 365 Business			9	SDK Test PO	SK13584	⊗	✓	26/Aug/19	✓

Total Records: 3

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:** End-user 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 


Customer Portal SDK - StreamOne Hello SinghSandeep Log off

« Order Detail Cube Solution ↺

Order: ● Domain: sgwswswgig End User PO: Testing Orders End Customer: Akshay Singh Log History: [View](#)


BASE SUBSCRIPTION  
Microsoft 365 E3  
SKU: SK16434  
Status: ●


Quantity:  [Save](#)



BASE SUBSCRIPTION  
Office 365 Enterprise E3  
SKU: SK16429  
Status: ●

Quantity:  [Save](#)



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 pre-installed 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:** Customization configuration
- **Application Name:** Customization 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 GM

### COST ESTIMATION



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