



## Customer Portal SDK- StreamOne ION User Manual

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## About the Application

It is easy to get started with Customer Portal SDK – StreamOne Ion. Every StreamOne Ion 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 Ion.

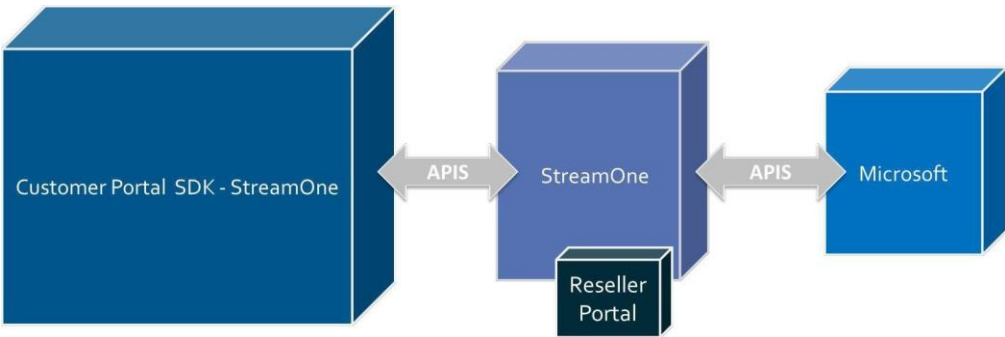
The Customer Portal does not replace StreamOne Ion but offers an alternative environment for seat modification.

As a customer, you will have access to all your end users and their Microsoft CSP subscriptions. For your end users’, all you need to do is grant them access and decide which subscription 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 Ion?

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 Ion 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 (,). The users can also **Turn Off** their application from the configuration page.

SDK Portal StreamOne Ion Customer Admin Report Settings Hello tanmay.anand@edtrum.com Log off

Configuration Settings

APP CONFIGURATION

AppUrl	https://privatelabelite-quality.azurewebsites.net	Edit
AllowedResellers	dinesh.singhchauhan@techdata.com, shubham.shukla@blue-thread.com, Tarun.chaubey@blue-thread.com, vinay.sharma@bettercommerce.io, ismael.tolos@techdata.com, SDKCSPManager@Outlook.com, indrajaiswal@blue-thread.com, mohammad.shahrukh@tdsynnex.com, mohammad.shahrukh@blue-thread.com, tanmay.anand@edtrum.com, random.tolos@outlook.com, tomkalmus@hotmail.com	Edit
ResellerName	SDK Test (Demo ISV)	Edit
Accountid	21349	Edit

API SETUP

refresh_token	ZTK5Y2KXZJETNJV4NY01OTIZLTMZDUTNJMODBLZJA3NGNI	Edit
grant_type	refresh_token	Edit
RequestOAuthTokenURL	https://ion.tdsynnex.com/oauth/token	Edit

API CALLS

GetProductURL	https://ion.tdsynnex.com/api/v3/accounts/{accountid}/products/{productid}	Edit
GetCustomerSubscriptionDetailsUrl	https://ion.tdsynnex.com/api/v3/accounts/{accountid}/customers/{customerid}/subscriptions/	Edit
CreateOrUpdateOrder	https://ion.tdsynnex.com/api/v3/accounts/{accountid}/customers/{customerid}/orders	Edit
ListCustomerSubscriptionsURL	https://ion.tdsynnex.com/api/v3/accounts/{accountid}/subscriptions?customerid=	Edit
ListCustomersURL	https://ion.tdsynnex.com/api/v3/accounts/{accountid}/customers	Edit

APPLICATION TURN OFF

Turn Off Application ☒

(WARNING!) This will turn off immediately your application and display customizable message

SDK Application has been deactivated, please contact your provider for the new URL

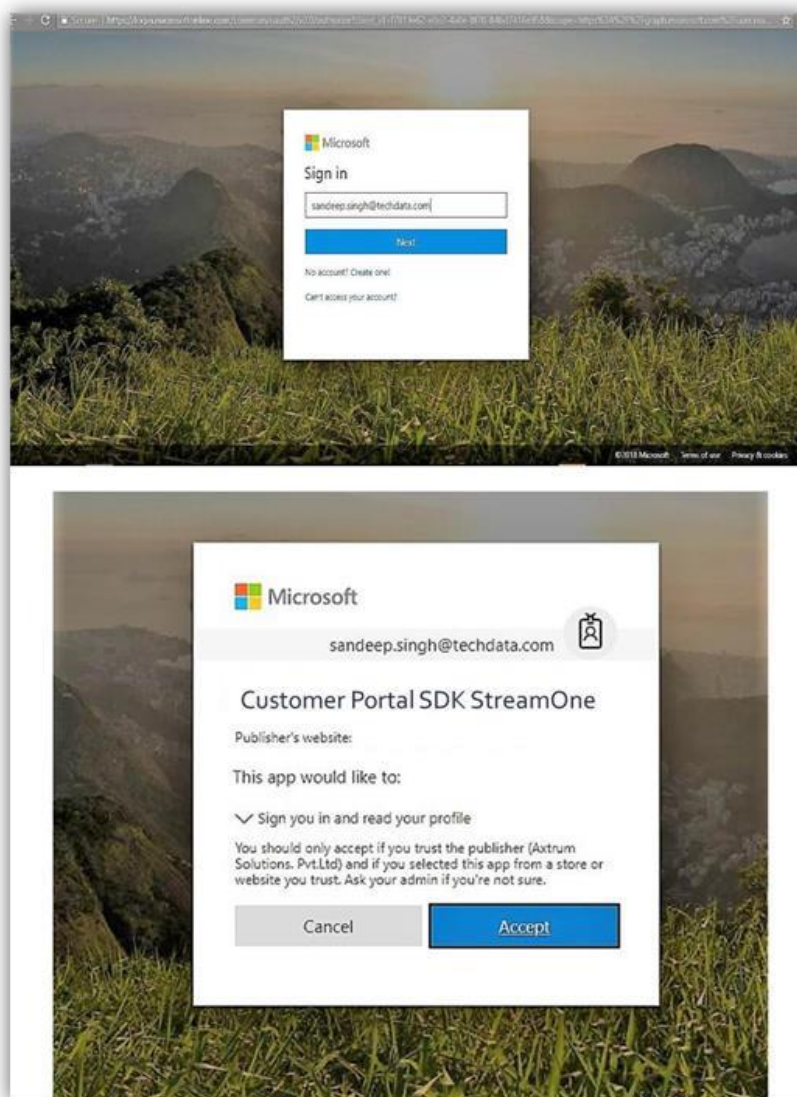
Edit Save

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

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

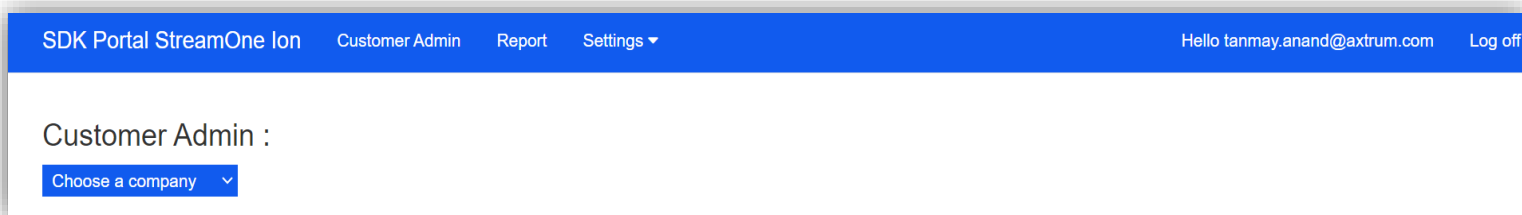
## Login Screens

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:



The screenshot shows a web application interface for 'Customer Admin'. At the top is a blue navigation bar with the text 'SDK Portal StreamOne Ion' on the left and 'Hello tanmay.anand@axtrum.com Log off' on the right. In the center of the navigation bar are links for 'Customer Admin', 'Report', and 'Settings' with a dropdown arrow. Below the navigation bar, the main content area is titled 'Customer Admin :'. Under this title is a blue button with the text 'Choose a company' and a small downward arrow, indicating a dropdown menu.

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 Ion, and every seat modification will trigger a notification email.

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

To add users, you should go to:

### [Settings> Add App User](#)

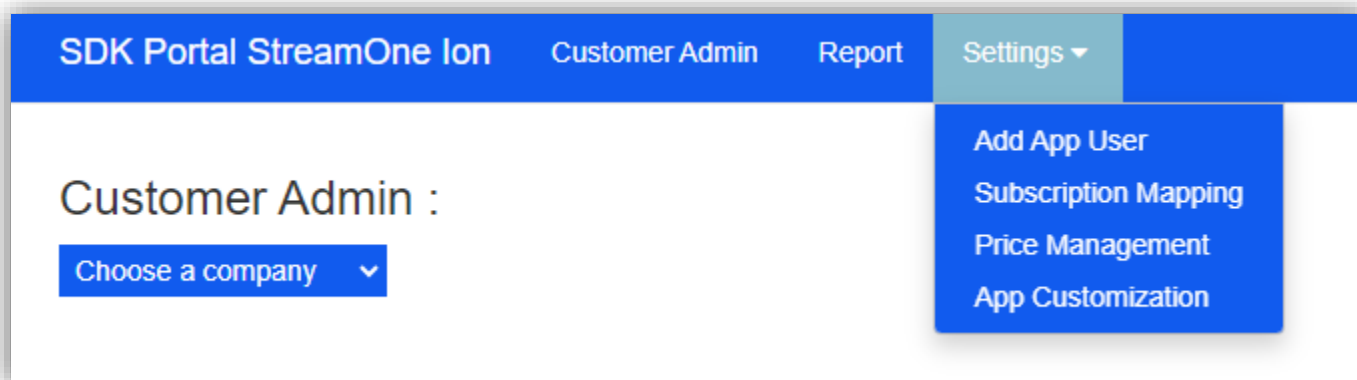
Create a user by adding a new email to access the app and link this email to a Company Name. To control the visibility those users have of their subscription and their products you should go to:

### [Settings> Subscription Mapping](#)

Mark or unmark a subscription to make it available or not to a specific user

### [Setting> App Customization](#)

Customers can customize their SDK portal using customization



## Report

Allow Partners to generate and download multiple reports from the SDK portal in the form of a .CSV file

SDK Portal StreamOne IonCustomer AdminReportSettings ▾

Reports

All Users by role:Export CSV Report

Subscription Details:Export CSV Report

Pricebook Configuration:Export CSV Report

Subscription Mapping:Export CSV Report

Seat History report: (All Customers)📄 Export CSV Report

## 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. Subscription Mapping
- 3. Price Management
- 4. App Customization



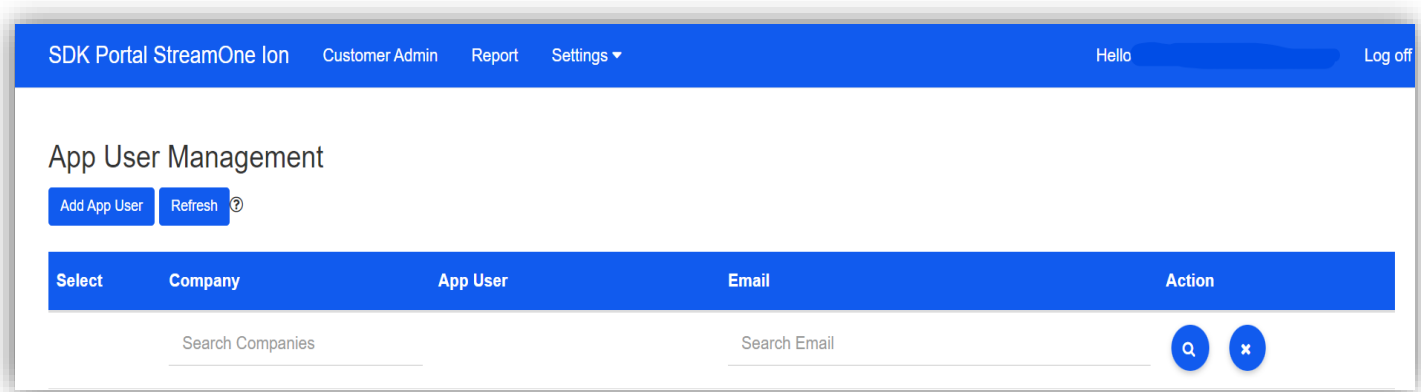
### Add App User

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.

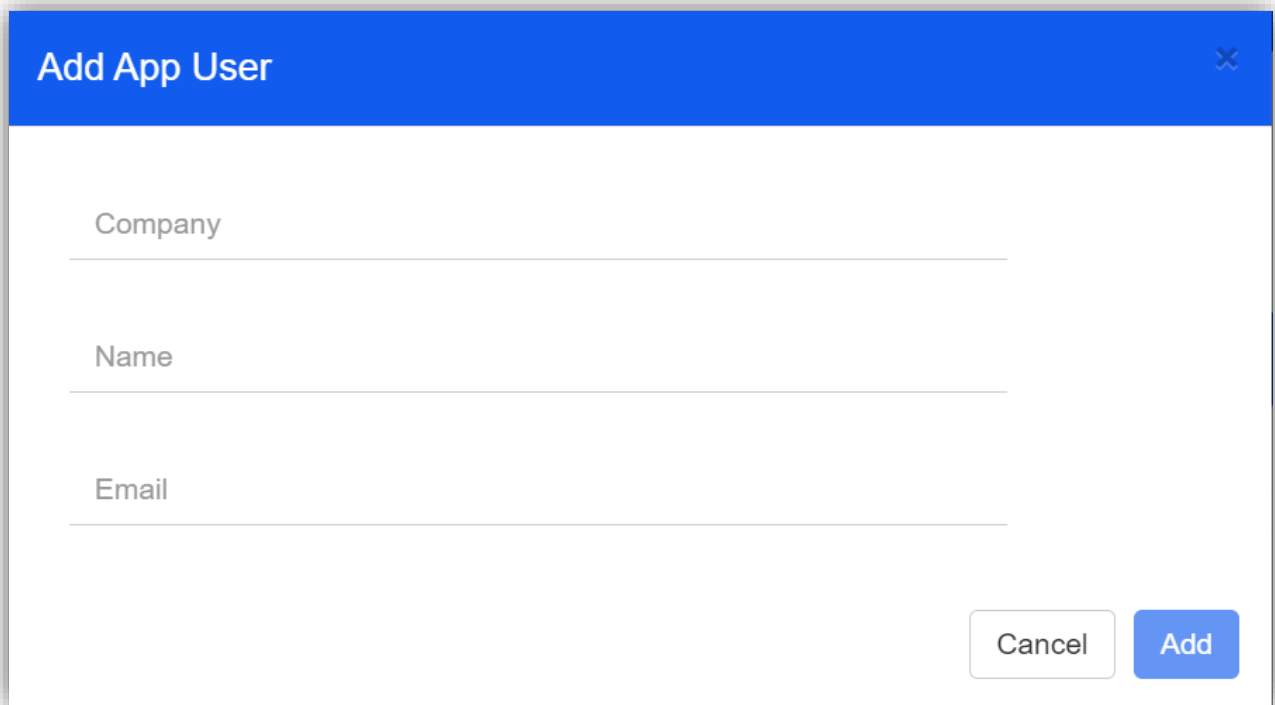
### App User Management

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



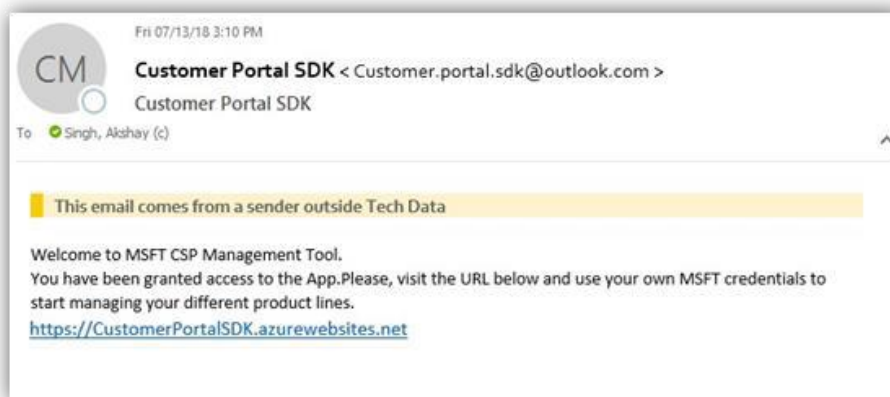
### Add a user

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



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

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.

Subscription Mapping

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

- 1. Click Settings > Subscription Mapping

Subscription Mapping : Cust 7 June

Cust 7 June

Map All

UnMap All

⇒ 1

Save Mapping

Manufacturing Part Number	Subscription ID	Product	ResellerPO	Quantity	
CFQ7TTC0LCHC:0002:P1M:M	40155f92-abea-4174-db83-00553d02524a	Microsoft 365 Business Premium		7	2
CFQ7TTC0LH1G:0001:P1M:M	39c102d1-2063-474b-c505-b35e71da71d3	Microsoft 365 Apps for business	hghgd	5	<input checked="" type="checkbox"/>
CFQ7TTC0LH18:0001:P1Y:Y	1aa448b1-9a26-4dfc-ce1e-aa617aa52fb8	Microsoft 365 Business Basic	bdggd	4	<input checked="" type="checkbox"/>

Total Records: 3

- 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

Subscription Mapping : Cust 7 June

Cust 7 June

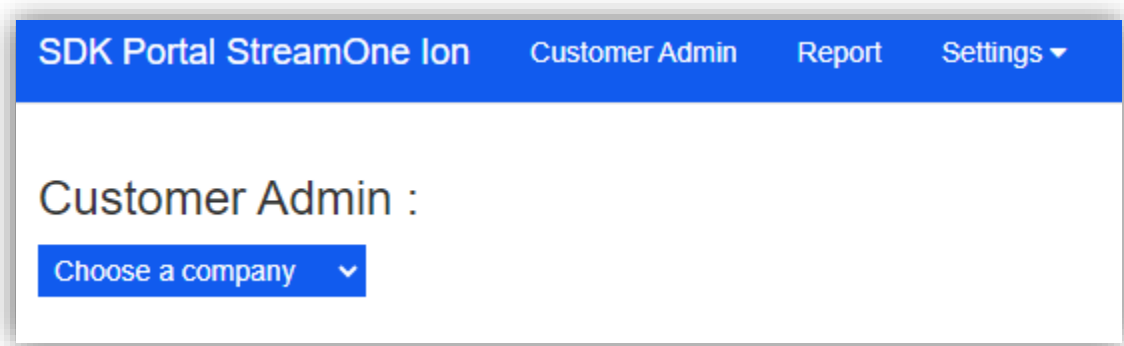
Map AllUnMap All

Save Mapping

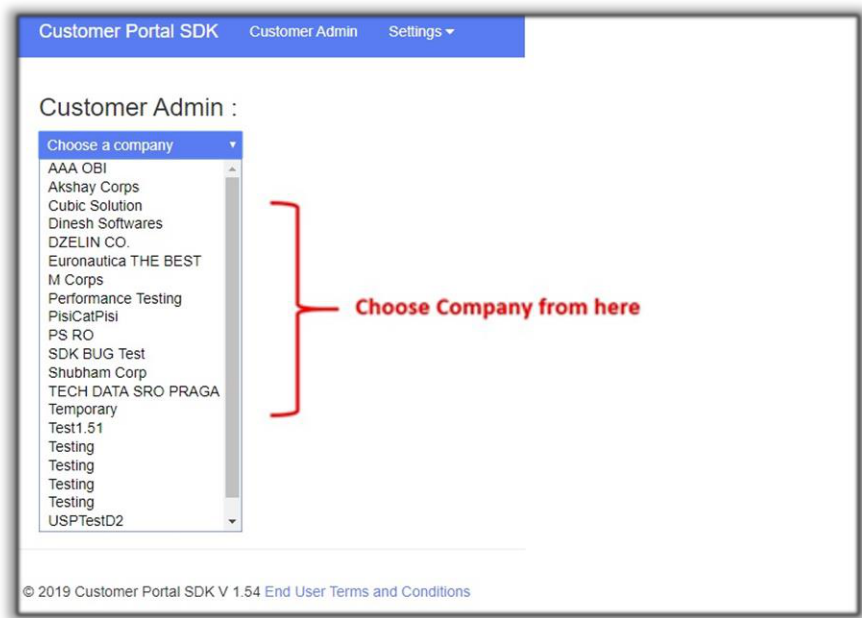
Manufacturing Part Number	Subscription ID	Product	ResellerPO	Quantity	
CFQ7TTC0LCHC:0002:P1M:M	40155f92-abea-4174-db83-00553d02524a	Microsoft 365 Business Premium		7	<input type="checkbox"/>
CFQ7TTC0LH1G:0001:P1M:M	39c102d1-2063-474b-c505-b35e71da71d3	Microsoft 365 Apps for business	hghgd	5	<input checked="" type="checkbox"/>
CFQ7TTC0LH18:0001:P1Y:Y	1aa448b1-9a26-4dfc-ce1e-aa617aa52fb8	Microsoft 365 Business Basic	bdggd	4	<input checked="" type="checkbox"/>
Total Records: 3					

**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
- **Product:** Product name
- **Manufacturing Part Number:** Manufacturing part number of product
- **Initial Cost:** Initial Cost price of product
- **Sales Price:** Sales price of product for the end-user
- **Quantity:** Number of seats
- **Reseller PO:** Reseller purchase order
- **Subscription ID:** Subscription ID
- **Status:** Subscription status
- **Commitment:** Commitment term
- **Frequency:** Frequency of Billing
- **Purchased On:** Subscription placing date
- **Renewal:** Status of auto-renewal
- **Expiration Date:** Date of product Expiration

There is Edit icon (  ) on the right which allows for seat modification.

Customer Admin : Cust 7 June

Cust 7 June ▼

Product	Manufacturing Part Num	Initial Cost	Sales Price	Quantity	Reseller PO	Subscription ID	Status	Commitment	Frequency	Purchased On	Renewal	Expiration Date	
Microsoft 365 Business Premium	CFQ7TTC0LCHC:0002:P1M:M	9,468.85		7		40155f92-abea-4174-db83-00553d02524a	active	Monthly	monthly	07/Jun/24	ENABLED	06/Jul/24	
Microsoft 365 Apps for business	CFQ7TTC0LH1G:0001:P1M:M	4,504.60	4,729.83	5	hghgd	39c102d1-2063-474b-c505-b35e71da71d3	active	Monthly	monthly	07/Jun/24	ENABLED	06/Jul/24	
Microsoft 365 Business Basic	CFQ7TTC0LH18:0001:P1Y:Y	25,740.56		4	bdggd	1aa448b1-9a26-4dfc-ce1e-aa817aa52fb8	active	Annual	annual	07/Jun/24	ENABLED	06/Jun/25	

Subscription Detail Page

Activation, Suspension and Cancel subscription option available along with the Product Images

Subscription Detail : Cust 7 June

Subscription ID : 39c102d1-2063-474b-c505-b35e71da71d3

Manufacturing Part Number : CFQ7TTC0LH1G-0001-P1M:M

Reseller PO : hghgd

End Customer : Cust 7 June

Log History : [View](#)

SUBSCRIPTION

Suspend

Cancel

Cancel Subscription

Microsoft 365 Apps for business

Subscription Status : Active

Commitment Term : monthly

Billing Frequency : Monthly

Auto-renewal : ENABLED

Expiration Date : 06 July 2024

Quantity : 

-


5

+

Save

Initial Subscription Cost : 4,504.60 HUF

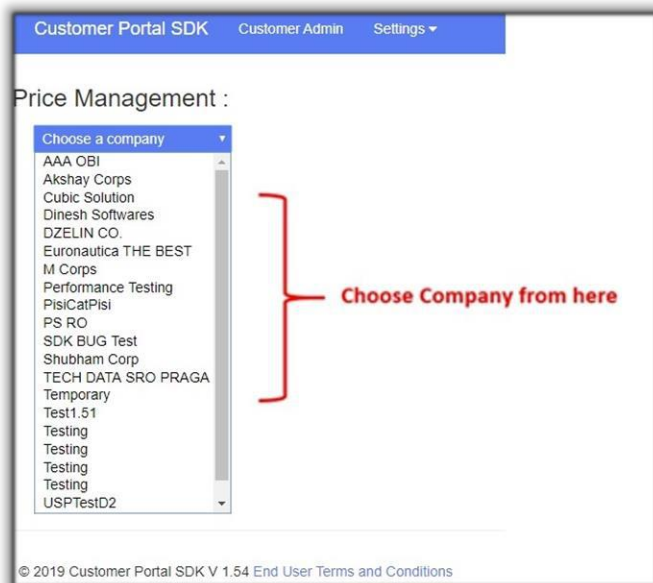
Total Initial Subscription Cost : 22,522.99 HUF

 **Microsoft 365**  
Apps for business

## 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 : Cust 7 June

Cust 7 June

Seat Increase Limit  Save Markup %

☐ Empty  
☐ Tax included  
☐ Tax excluded

Manufacturing Part Number	Product	Subscription ID	Initial Subscription Cost	Markup %	Sales Price	Seat Increase Limit	Tax Status	Quantity	Total Sales Price	Manage
CFQ7TTC0LCHC.0002:P1M:M	Microsoft 365 Business Premium	40155f92-abea-4174-db83-00553d02524a	9,468.85 HUF					7		  
CFQ7TTC0LH1G.0001:P1M:M	Microsoft 365 Apps for business	39c102d1-2063-474b-c505-b35e71da71d3	4,504.60 HUF	5.00	4,729.83	1	Tax Excluded	5	23,649.15	  
CFQ7TTC0LH18.0001:P1Y:Y	Microsoft 365 Business Basic	1aa448b1-9a26-4dfc-ce1e-aa617aa52fb8	25,740.56 HUF					4		  



## 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.

Price Management : Cust 7 June

Cust 7 June

Seat Increase Limit  Save Markup %

☐ Empty  
☐ Tax included  
☐ Tax excluded

Manufacturing Part Number	Product	Subscription ID	Initial Subscription Cost	Markup %	Sales Price	Seat Increase Limit	Tax Status	Quantity	Total Sales Price	Manage
CFQ7TTC0LCHC.0002:P1M.M	Microsoft 365 Business Premium	40155f92-abea-4174-db83-00553d02524a	9,468.85 HUF	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	7		
CFQ7TTC0LH1G.0001:P1M.M	Microsoft 365 Apps for business	39c102d1-2063-474b-c505-b35e71da71d3	4,504.60 HUF	5.00	4,729.83	1	Tax Excluded	5	23,649.15	
CFQ7TTC0LH18.0001:P1Y.Y	Microsoft 365 Business Basic	1aa448b1-9a26-4dfc-ce1e-aa617aa52b8	25,740.56 HUF					4		

## Important

If you haven't set the markup values for any subscription, then the price information for that won't be visible on the End-Customer view.

Price Management : RODISKNCETEST

RODISKNCETEST

Seat Increase Limit  Save Markup %

☐ Empty  
☐ Tax included  
☒ Tax excluded

Domain	Product	Type	Order	Initial Subscription Cost	Markup %	Sales Price	Seat Increase Limit	Tax Status	Quantity	Total Sales Price	SKU	Manage
April1stnce	Microsoft 365 Business Basic	NCE	S000443903	£ 3.83	20	4.6	5	Include	4	£ 18.40	SK64343	
31stmarnc	Microsoft 365 Business Basic	NCE	S000443834	£ 3.83					2		SK64343	
Mar28th2022	Microsoft 365 Business Basic	NCE	S000443591	£ 3.83			2		4		SK64343	

## App Customization

App Customization setting option allow partners to customize Application Name, Logo and Application Basic Colors (navigation bar and buttons / shade).  
Welcome email Customization – New setting option allows partners to customize the Welcome Email that is received for each new end customer created within the application .

SDK Portal StreamOne

Customer Admin

Report

Settings

Help

Log off

App Customisation

Application Name: SDK Portal StreamOne

Edit

Save

Choose a logo:

Choose File

No file chosen

Image Supported formats(JPG,PNG,JPEG)

Color code for NavBar:

Submit

Color code for Buttons/Shade:

Submit

Email Customisation

Welcome Email:

Welcome to MSFT CSP Management Tool. </br> You have been granted access to the App.Please, visit the URL below and use your own MSFT credentials to start managing your different product lines.

Edit

Save

## End User Portal

End users will only see subscription of the companies that they have been given access to and will only see subscription that they have been mapped to.  
Choose a Company from the list.

SDK Portal StreamOne Ion

End User:

Choose a company ▾

› 2024 SDK Portal StreamOne Ion V 2.0 [End User Terms and Conditions](#)

End User: Cust 7 June


Cust 7 June

Product	Manufacturing Part Number	Sales Price	Quantity	Customer PO	Subscription ID	Status	Commitment	Frequency	PurchasedOn	Renewal	Expiration Date	
Microsoft 365 Apps for business	CFQ7TTC0LH1G:0001:P1M.M	4,729.83 HUF	5	dhgdhgd	39c102d1-2063-474b-c505-b35e71da71d3	active	Monthly	monthly	07/Jun/24	ENABLED	06/Jul/24	
Microsoft 365 Business Basic	CFQ7TTC0LH18:0001:P1Y.Y		4	xfgb	1aa448b1-9a26-4dfc-ce1e-aa617aa52fb8	active	Annual	annual	07/Jun/24	ENABLED	06/Jun/25	


Total Records: 2

A table will show the below information.

- **Company:** Company name
- **Product:** Product name
- **Manufacture Part Number:** Manufacture part number
- **Sales Price:** Price of the product
- **Quantity:** Number of seats
- **Customer PO:** Purchase order
- **Status:** Subscription Status
- **Commitment:** Commitment term
- **Billing Frequency:** Frequency of Billing
- **Purchased On:** Subscription placing date
- **Auto-Renewal:** Status of auto-renewal
- **Expiration Date:** Date of product Expiration

There is Edit icon (  ) on the right which allows for seat modification.

Order Details Page

1. Click on the edit icon 

« Subscription Detail Cust 7 June

Subscription ID: 39c102d1-2063-474b-c505-b35e71da71d3

Manufacturing Part Number : CFQ7TTC0LH1G:0001:P1M:M

End User PO : dhgdhgd

End Customer : Cust 7 June

Log History : [View](#)

SUBSCRIPTION

Microsoft 365 Apps for business

Subscription Status : Active

Commitment Term : monthly

Billing Frequency : Monthly

Auto-renewal : ENABLED

Expiration Date : 06 July 2024

Quantity : 

-


5

+

Save


Price : 4,729.83 HUF Tax Excluded

Total Price : 23,649.15 HUF



Microsoft 365

Apps for business

- 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  
Ion or click on the refresh button 
- 5. Seat Decrease for the NCE products can only be done within 168 Hours of the purchase date.
- 6. Partner can do the seat decrease within 168 Hours window from the start of renewal date of the subscription.

Email Notification

On every seat modification and cancellation, 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	
refresh_token	(Provided by TD Synnex)
AccountId	(Provided by TD Synnex)

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