Customer Portal SDK- StreamOne ION User Manual

Content

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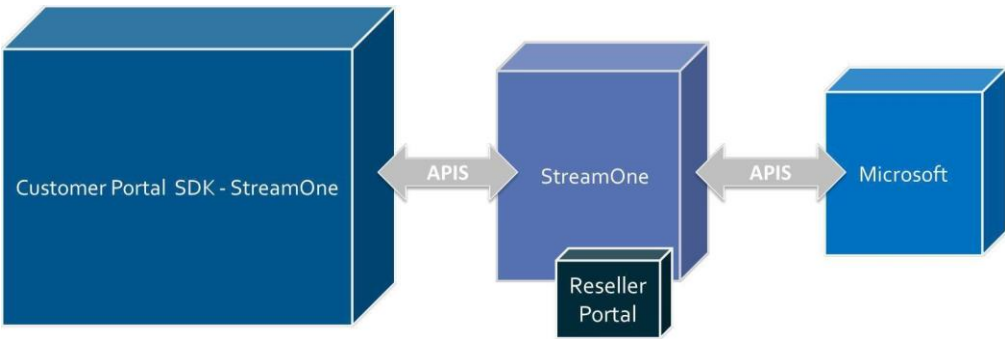
We believe by the time you read this document you will have completed the setup and hosting and have the site running with your customized URL. An example of this URL is:

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@axtrum.com	Log off

Configuration Settings

APP CONFIGURATION

AppUrl	https://privatelabellite-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,inder.jaiswal@blue-thread.com,mohammad.shahrukh@tdsynnex.com,mohammad.shahrukh@blue-thread.com,tanmay.anand@axtrum.com,random.tolos@outlook.com,tomkalmus@hotmail.com	Edit
ResellerName	SDK Test (Demo ISV)	Edit
AccountId	21349	Edit

API SETUP

refresh_token	ZTK5YZKXZJETNJY4NY01OTIZLTLMZDUTNJJMODBLZJA3NGNI	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

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

Note- For more details please check the "Application Configuration" section of this document
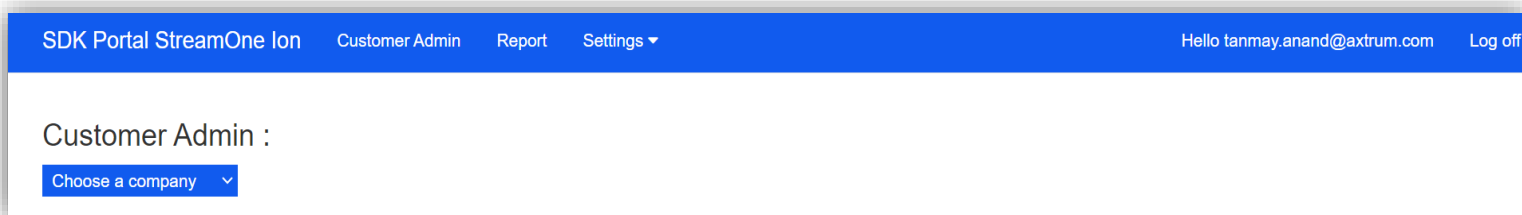
Login Screens

When you log in you will be redirected to your site, and you will be prompted to enter your credentials (Microsoft authentication).
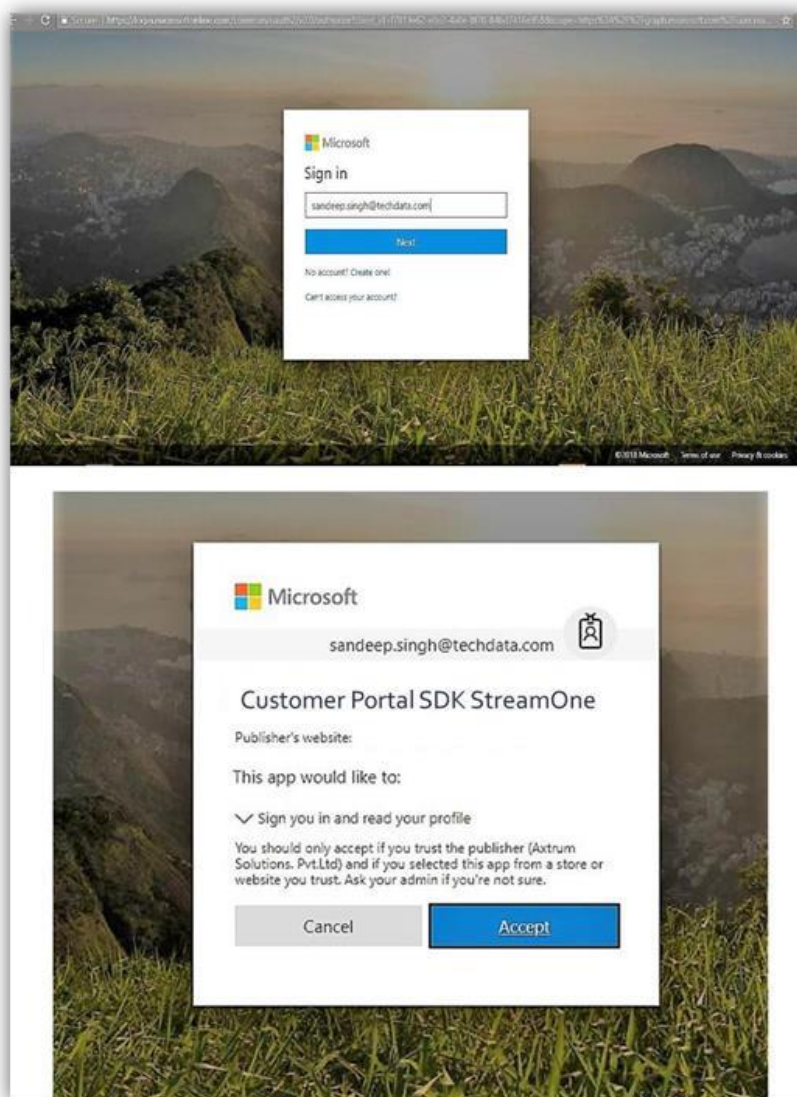
Once complete, click on 'Accept' and you will be directed to the respective portals i.e. Customer or End User Portal.

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

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
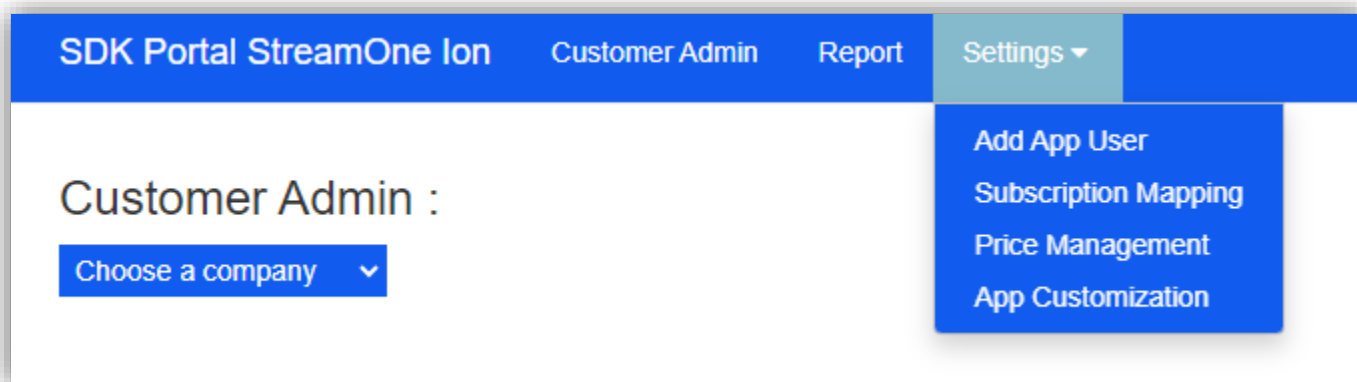
Report

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

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
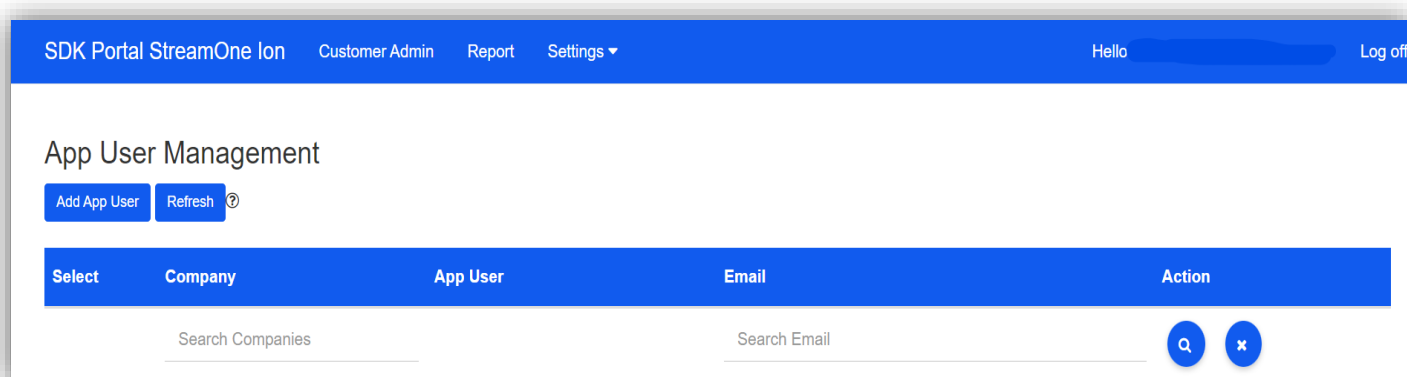
Add App User

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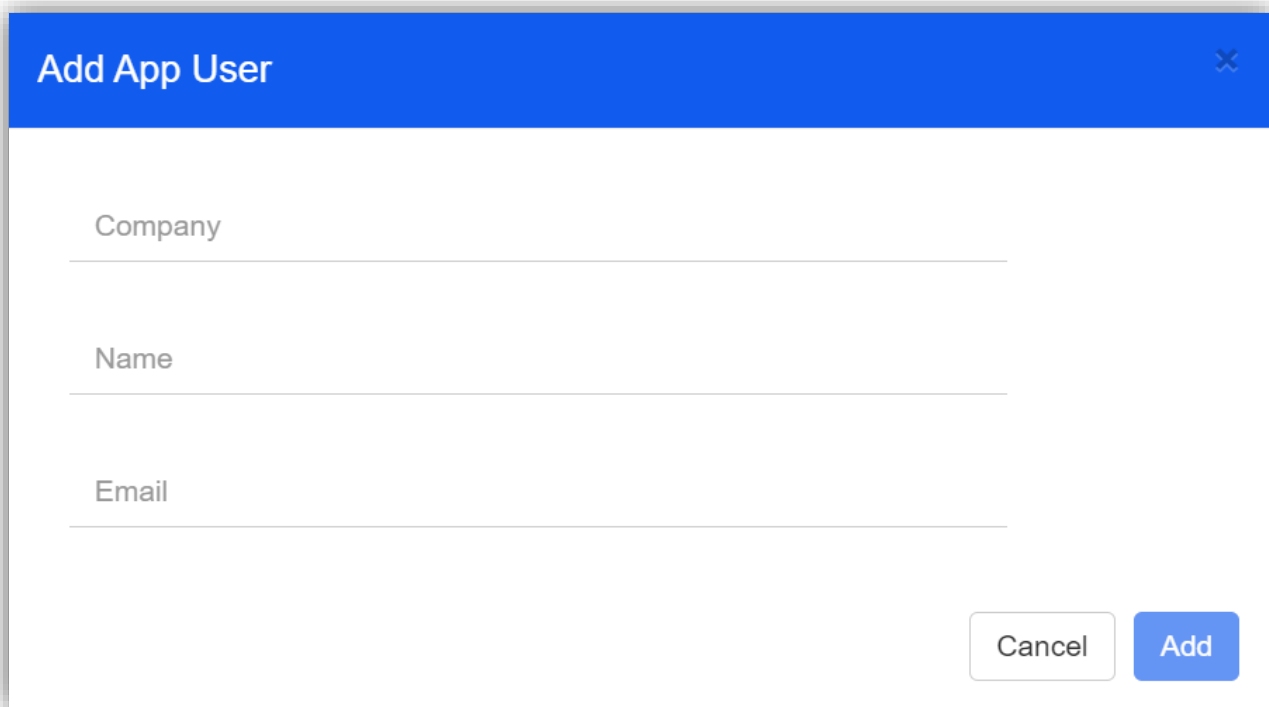
This page contains the list of users that belong to a company. Various actions can be performed.

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

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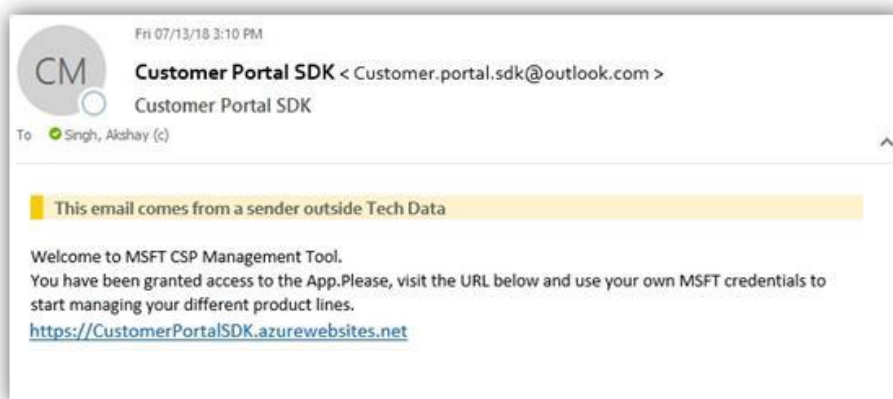
Delete a user

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

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

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

Customer Admin
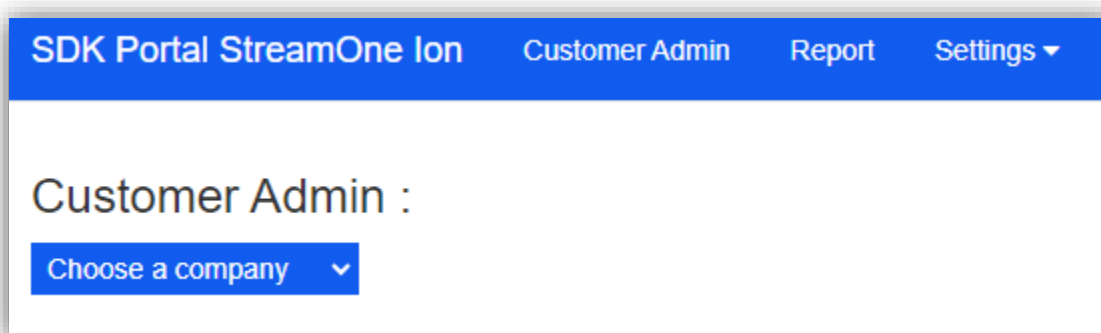
To see CSP Licenses please choose company from the dropdown list:
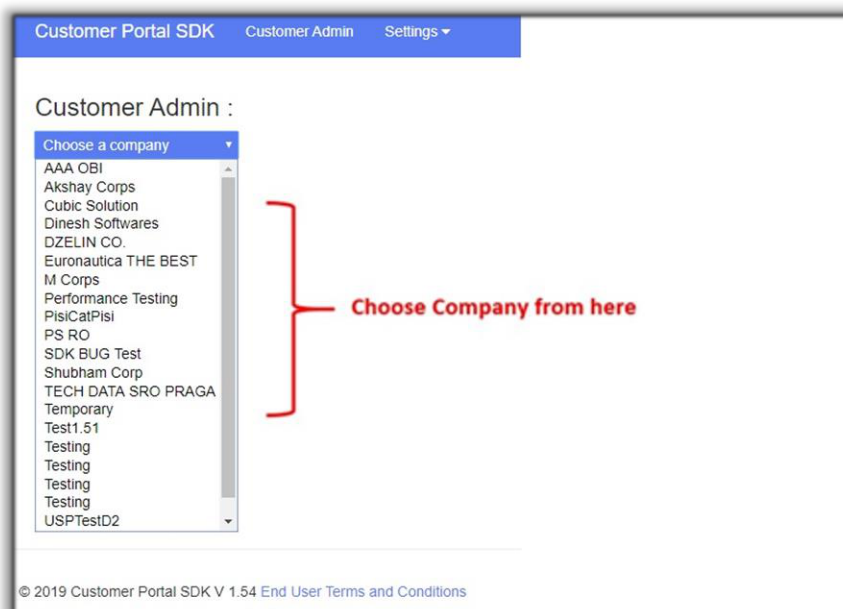
A table will show the below information
- **Company:** Company name
- **Product:** Product name
- **Manufacturing Part Number:** Manufacturing part number of product
- **Initial Cost:** Initial Cost price of product
- **Sales Price:** Sales price of product for the end-user
- **Quantity:** Number of 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 seat modification.
There are two new buttons **Refresh All** and **Refresh,** which refresh all subscriptions or only the selected ones, respectively.

Customer Admin : Cust 7 June

Cust 7 June

Refresh All   Refresh

Product	Manufacturing Part Numb	Initial Cost	Sales Price	Quantity	Reseller P	Subscription ID	Status	Commitment	Frequency	PurchasedOn	Renewal	Expiration Date	
M365 Business Premium	CFQ7TTC0LCHC:0002:P1M:M	9,880.53 HUF		25		40155f92-abea-4174-db83-00553d02524a	disabled	Monthly	monthly	07/Jun/24	DISABLED	06/Feb/25	☑
M365 Apps for business	CFQ7TTC0LH1G:0001:P1M:M	4,700.44 HUF		19		39c102d1-2063-474b-c505-b35e71da71d3	expired	Monthly	monthly	07/Jun/24	DISABLED	06/Mar/25	☐
M365 Business Basic	CFQ7TTC0LH18:0001:P1Y:Y	26,732.38 HUF		10		1aa448b1-9a26-4dfc-ce1e-aa617aa52fb8	active	Annual	annual	07/Jun/24	ENABLED	06/Jun/25	☐

Subscription Detail Page

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

Price Management

Using this option sets the following:

1. Markup
2. Seat Increase Limit
3. Tax Information
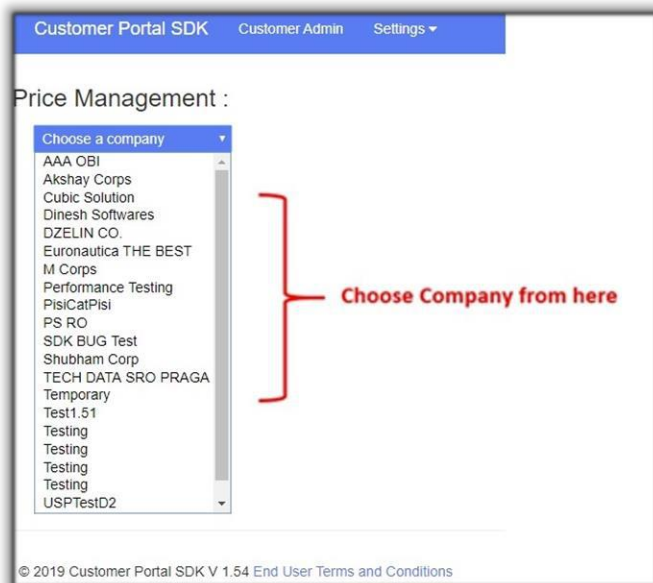
There are two scenarios for Price Management

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'

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.

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.

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 .

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.

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	xfgfb	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.

Subscription 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
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.

Security Updates:

System.Net.Http: Updated from version 4.3.2 to 4.3.4
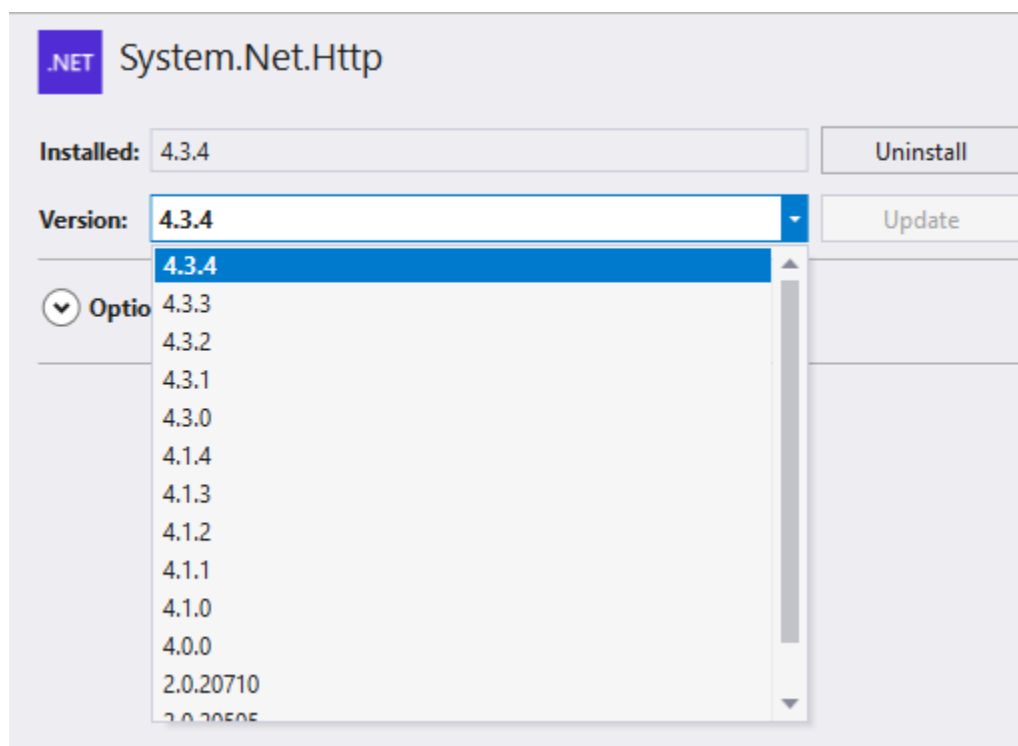
Microsoft.Owin: Updated from version 3.1.0 to 4.2.2
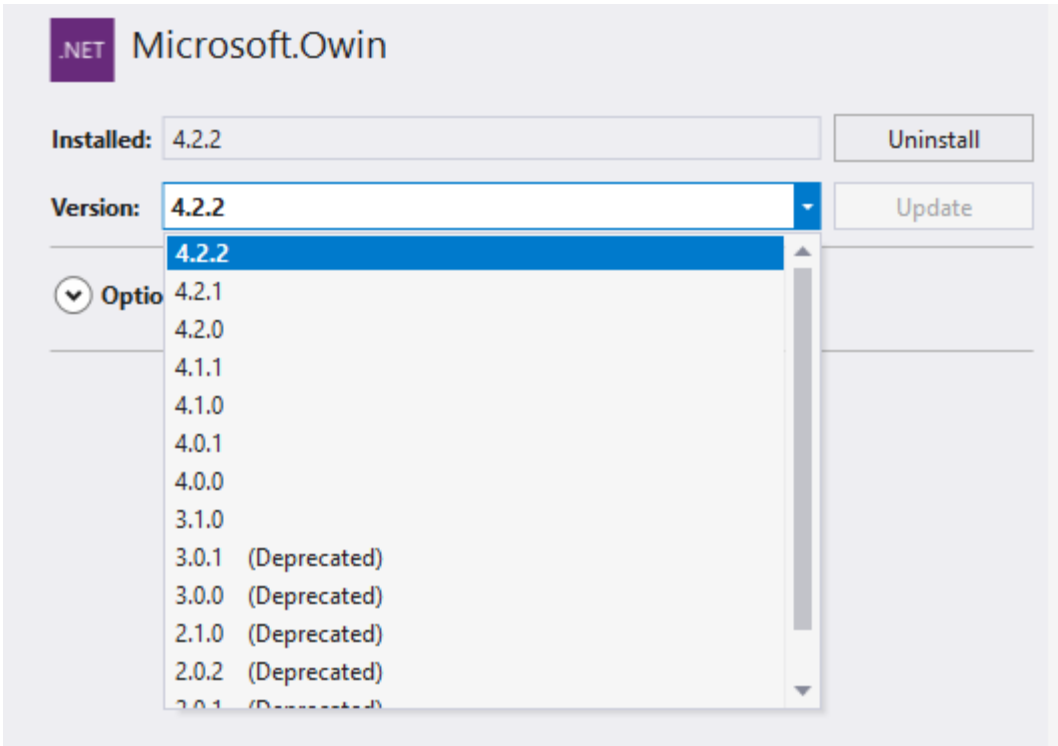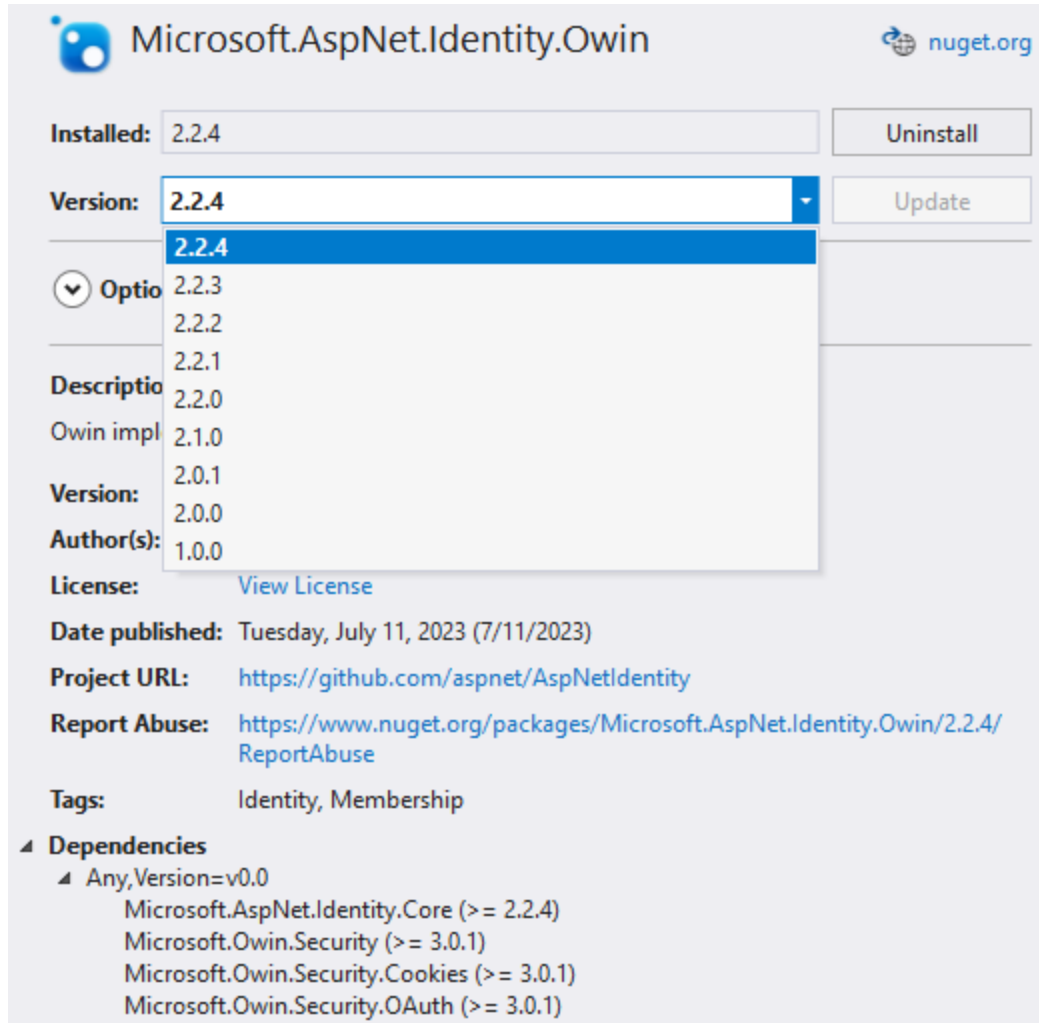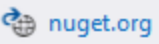
Newtonsoft.Json: Updated from version 10.0.3 to 13.0.3
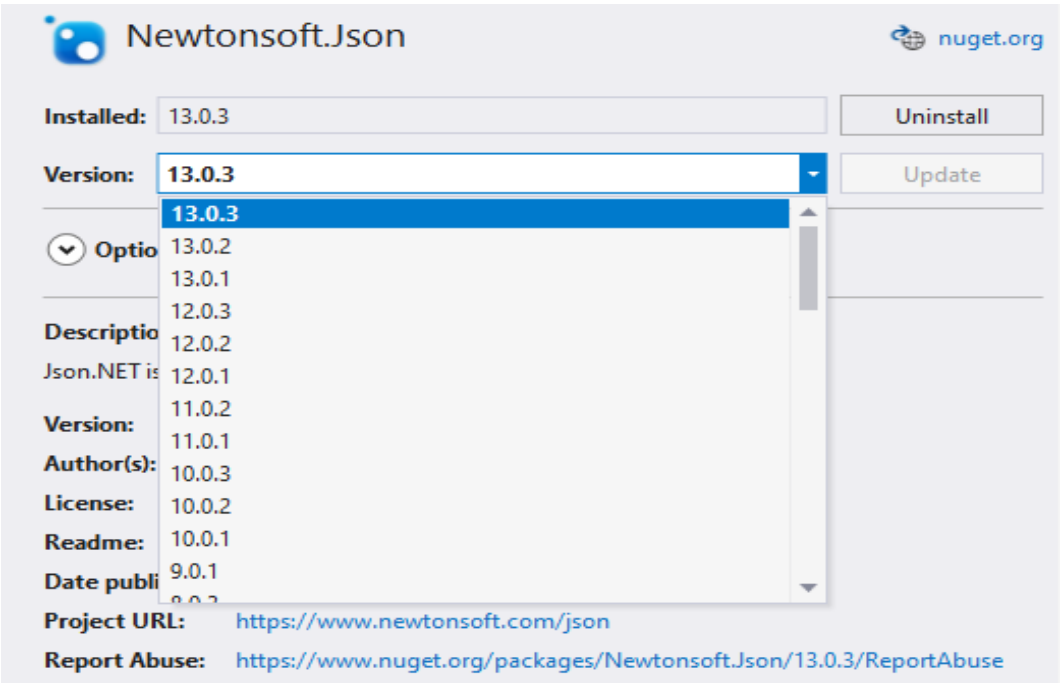
Microsoft.AspNet.Identity.Owin: Updated from version 2.2.1 to 2.2.4

Cookie Session ID : Set ASP.NET_SessionId secure flag to true.