Tech Data

Cloud Solutions

Customer Portal SDK- StreamOne User Manual

Content

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.

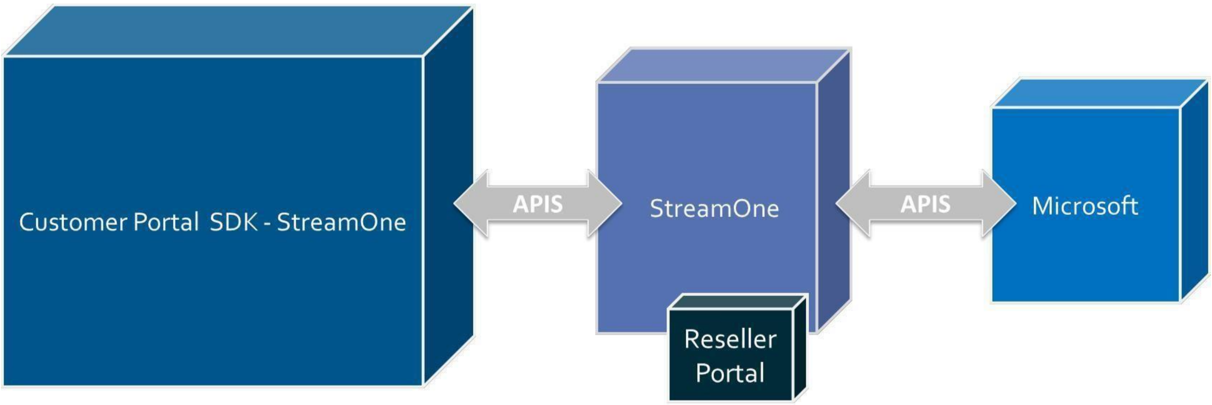
The Customer Portal does not replace StreamOne but offers an alternative environment for seat modification.

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?

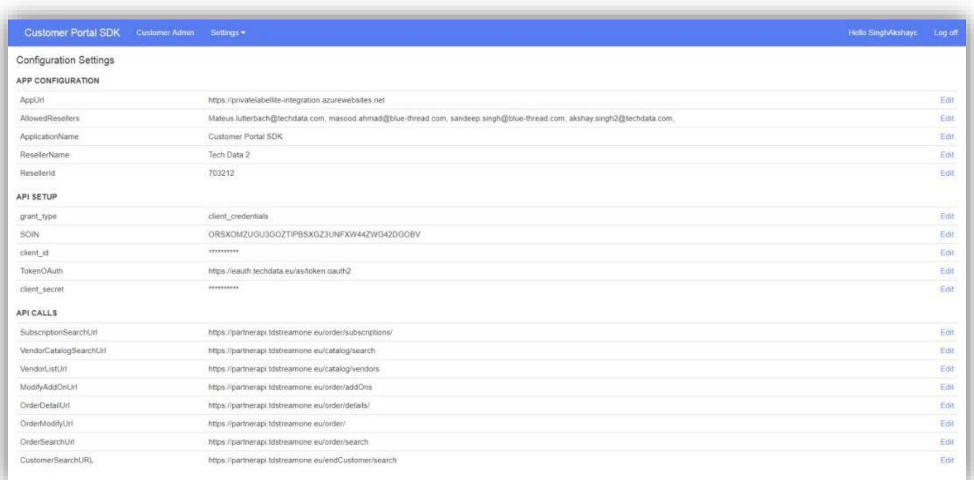


We believe by the time you read this document you will have completed the setup and hosting and have the site running with your customized URL. An example of this URL is:

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 (,).

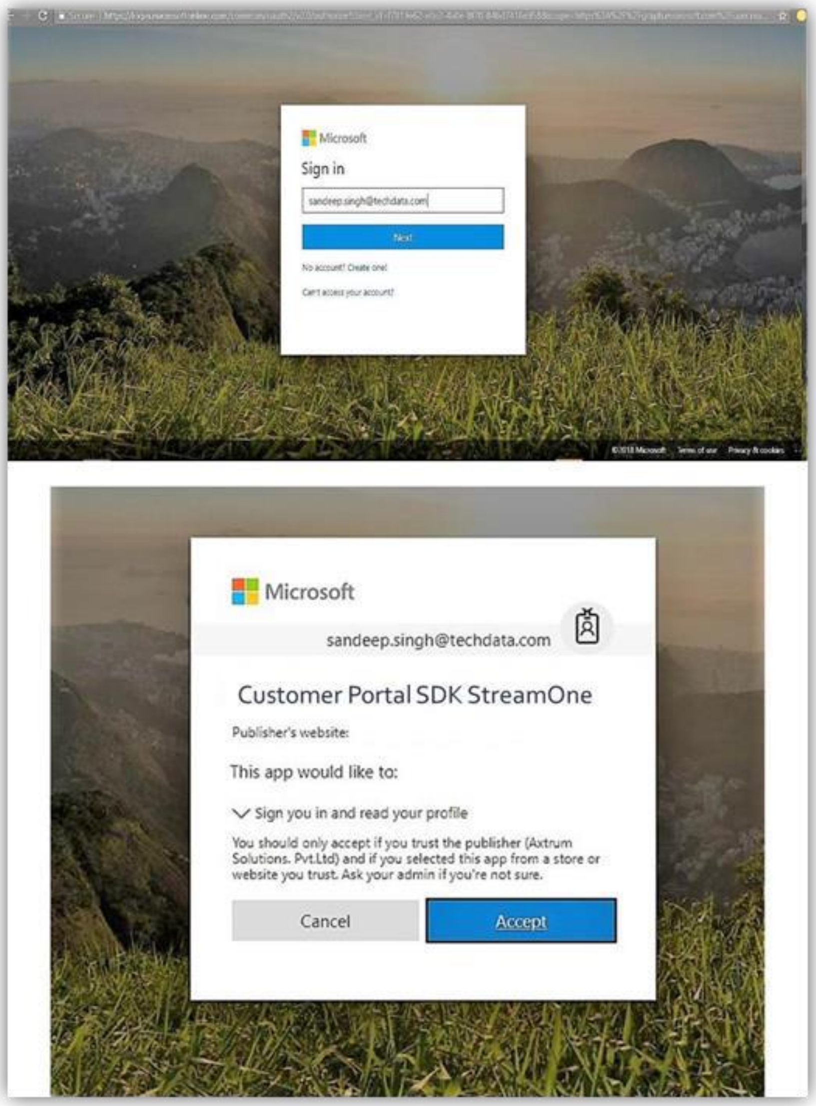
Configuration Page URL: https://Domain.azurewebsites.net/configuration



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

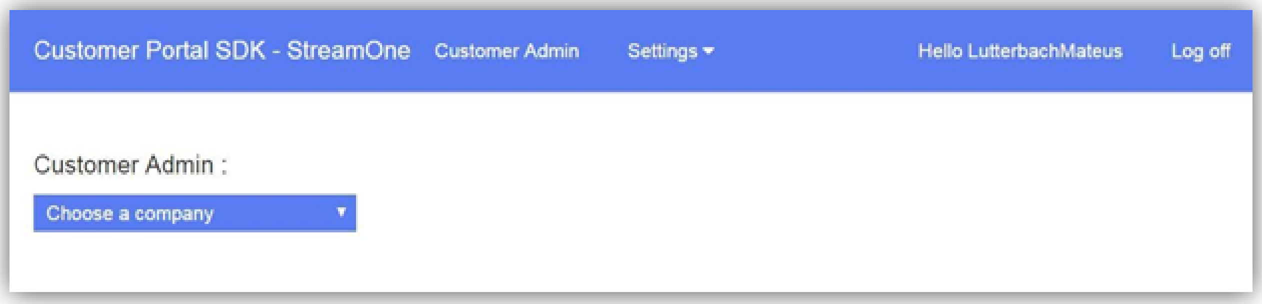
Login Screens

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

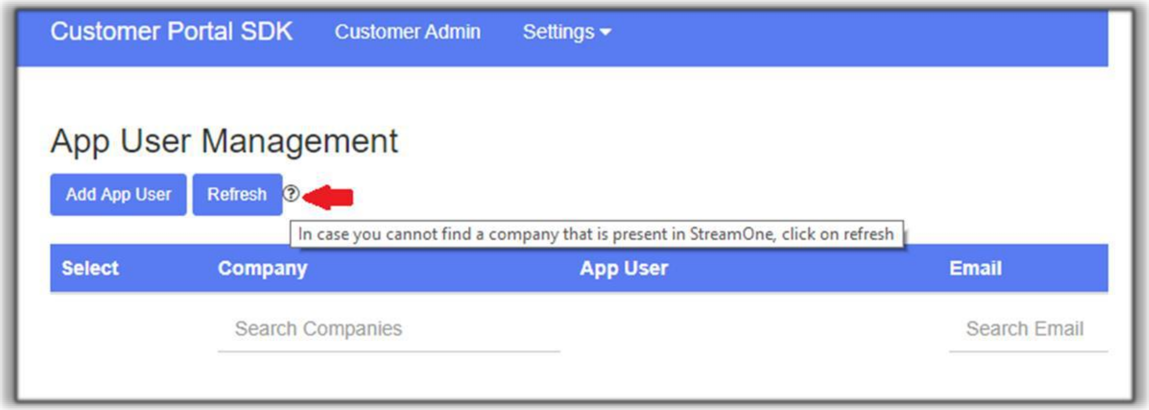
Add App User

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.

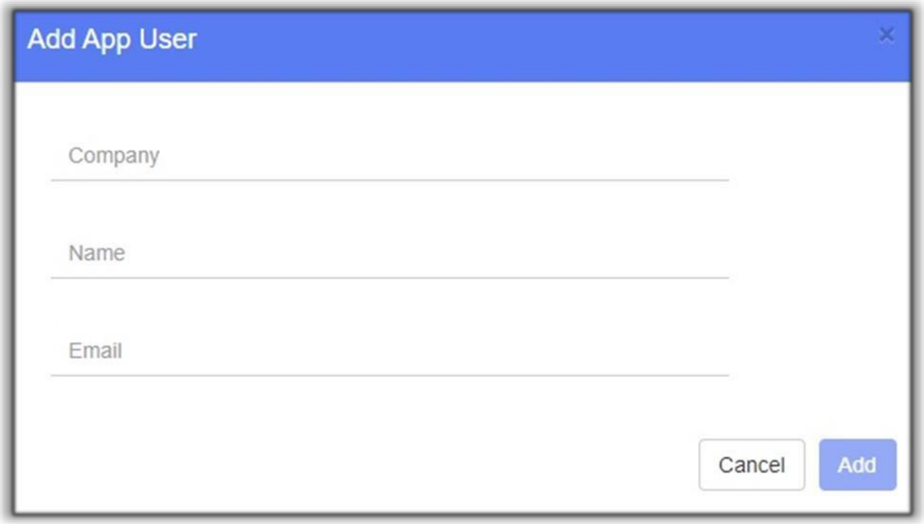
App User Management

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

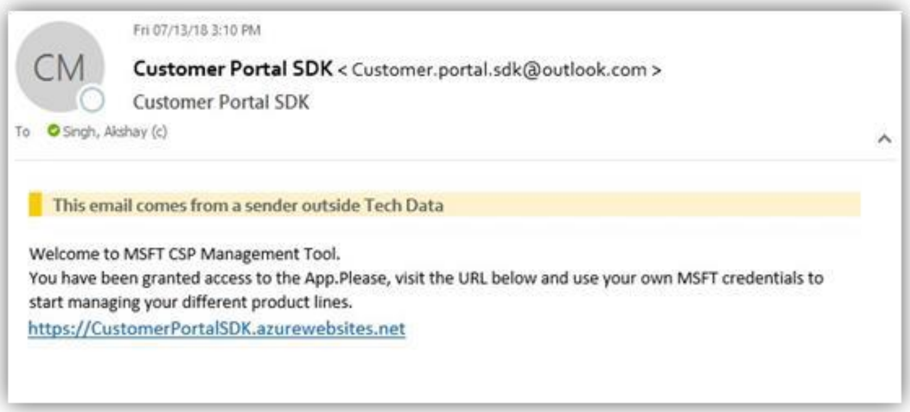


Add a user

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



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



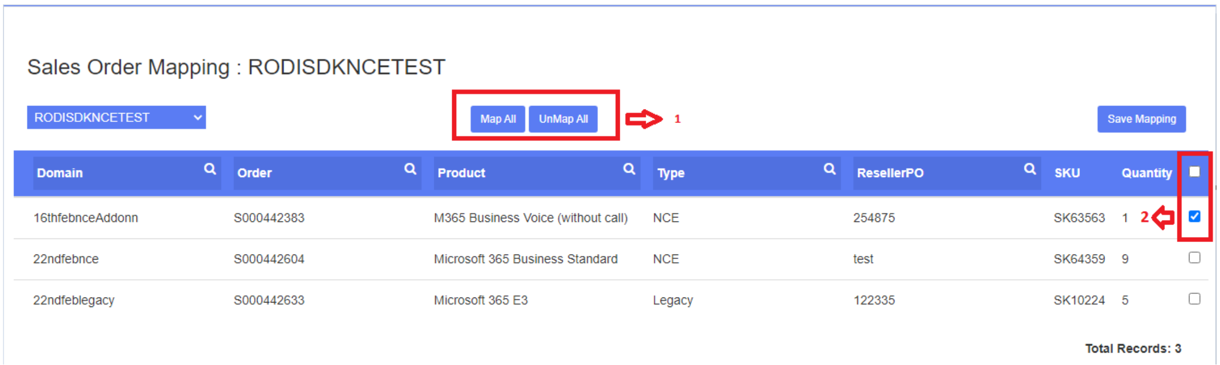
Delete a user

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.

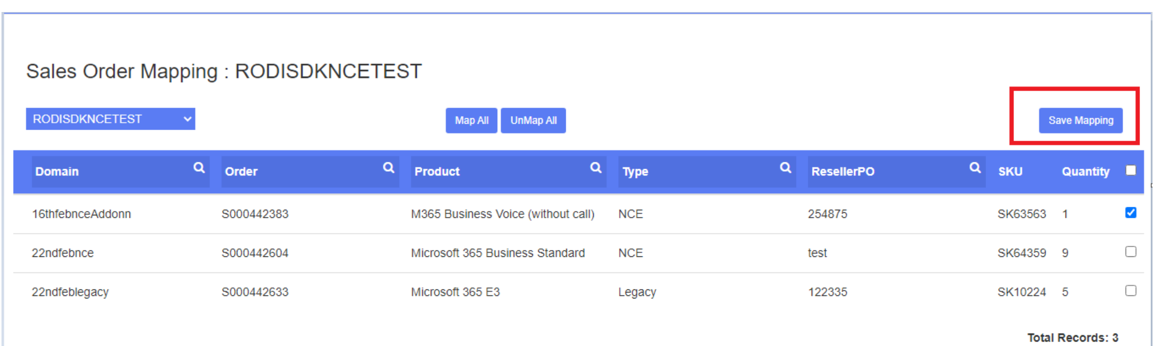
Sales Order Mapping

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

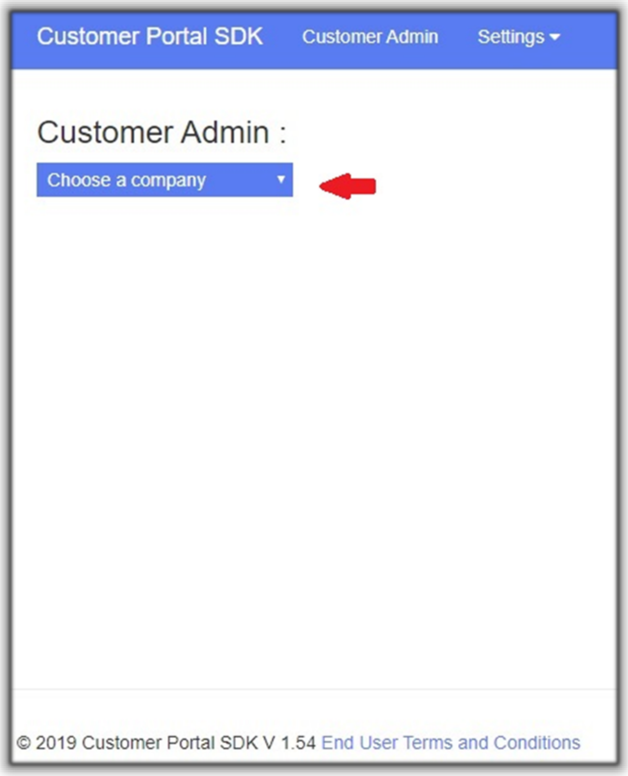


2. Choose Company to map any CSP license to that company:
   a. Option 1 can be used to Map/Un-Map all the CSP Licenses to the selected company.
   b. Option 2 Can be used to do mapping for each CSP Licenses on respective page
3. Click Save Mapping

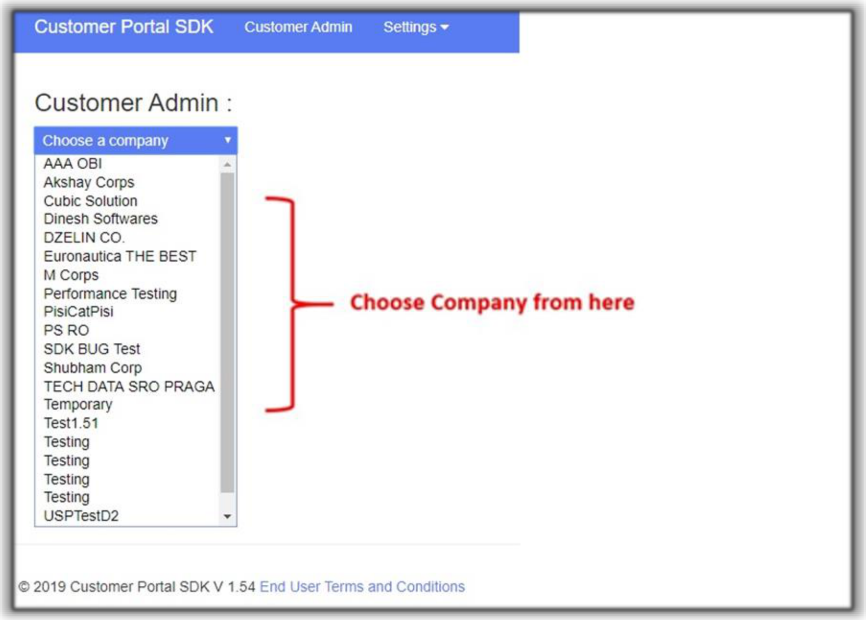


Important: There are certain functionalities you must be aware of in this section of the application

Customer Admin



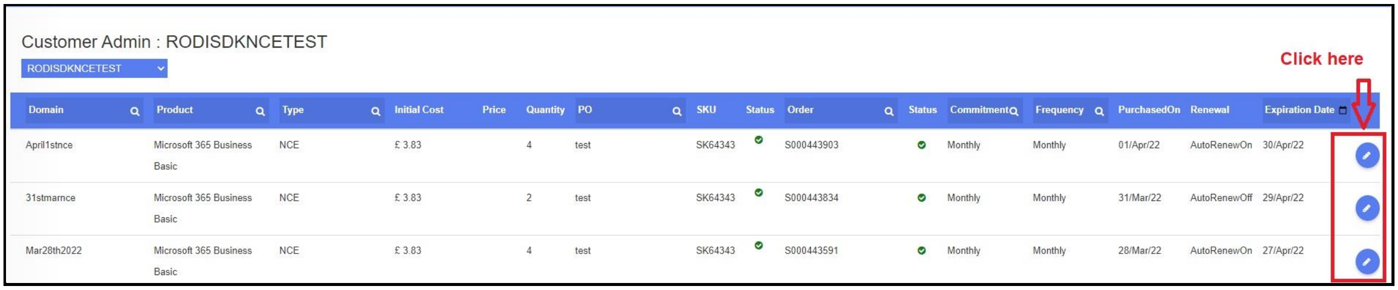
To see CSP Licenses please choose company from the dropdown list:



A table will show the below information

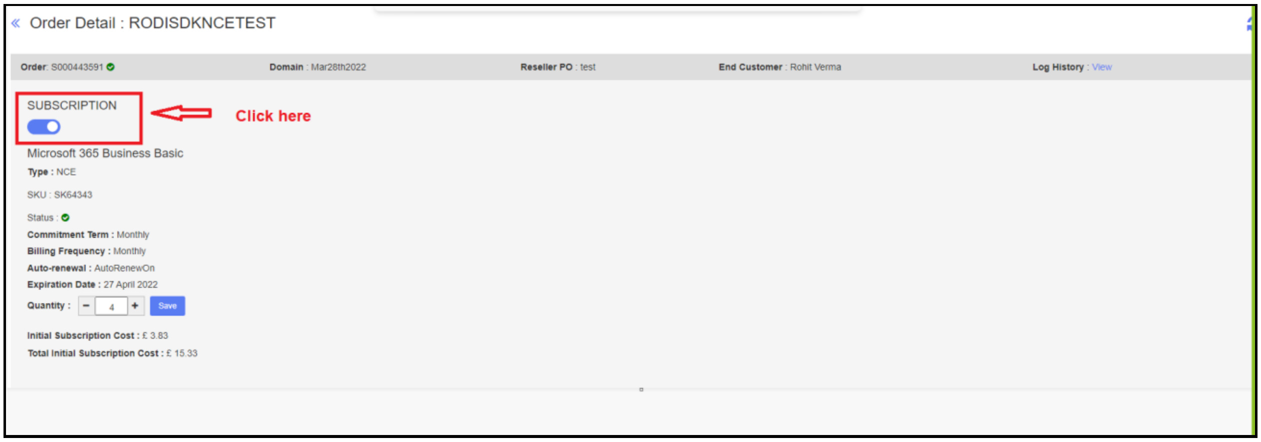
- **Company:** Company name
- **Domain:** Domain of the order
- **Product:** Product name
- **Type:** Microsoft Product Type
- **Initial Cost:** Initial Cost price of product
- **Price:** Sales price of product for the end-user
- **Quantity:** Number of seats
- **PO:** Reseller purchase order
- **SKU:** Manufacture part number
- **Status:** Product status (please hover your mouse to see the status)
- **Order:** Sales order number
- **Status:** Sales order status (please hover your mouse to see the status)
- **Commitment:** Commitment term
- **Frequency:** Frequency of Billing
- **Purchased On:** Order 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.



Order Details Page

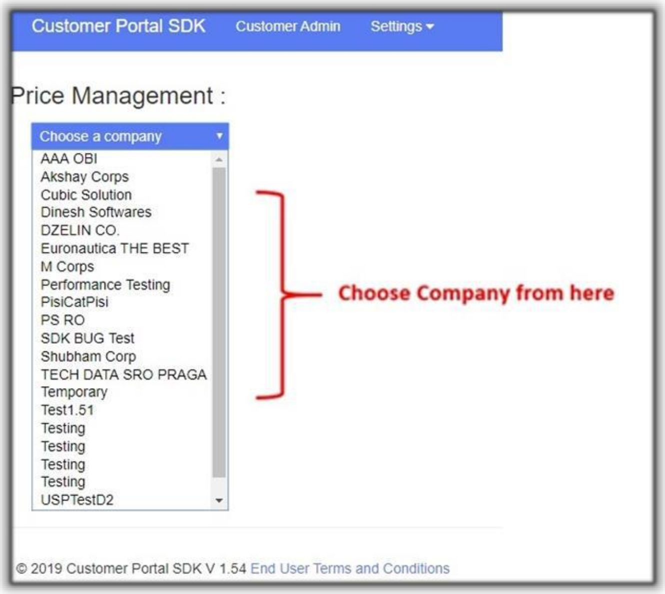
Activation and Suspension option available along with the Product Images



Price Management

Using this option sets the following:

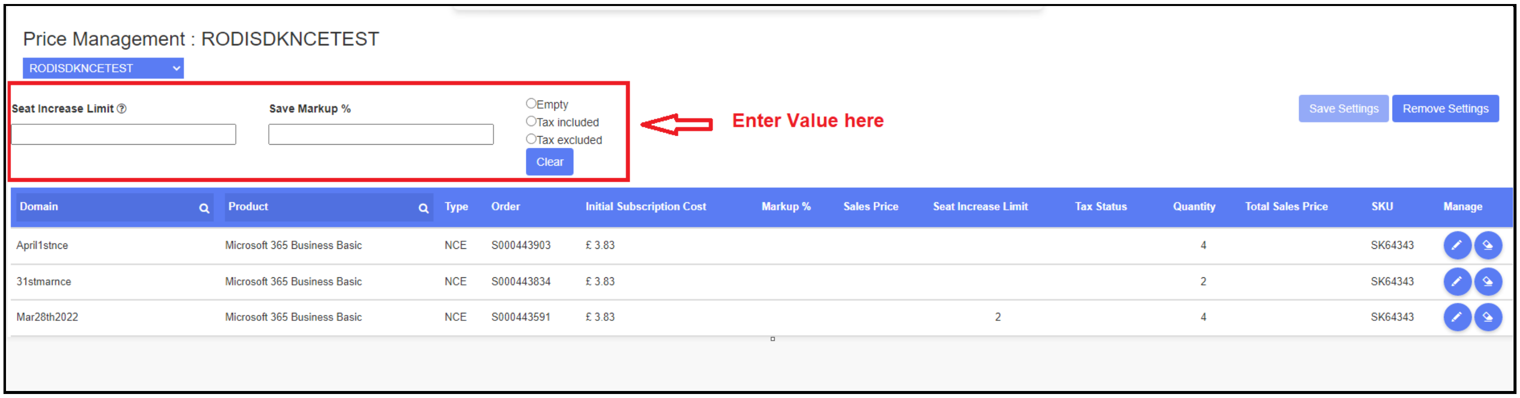
1. Markup
2. Seat Increase Limit
3. Tax Information



There are three scenarios for Price Management

A. For all orders of a company:

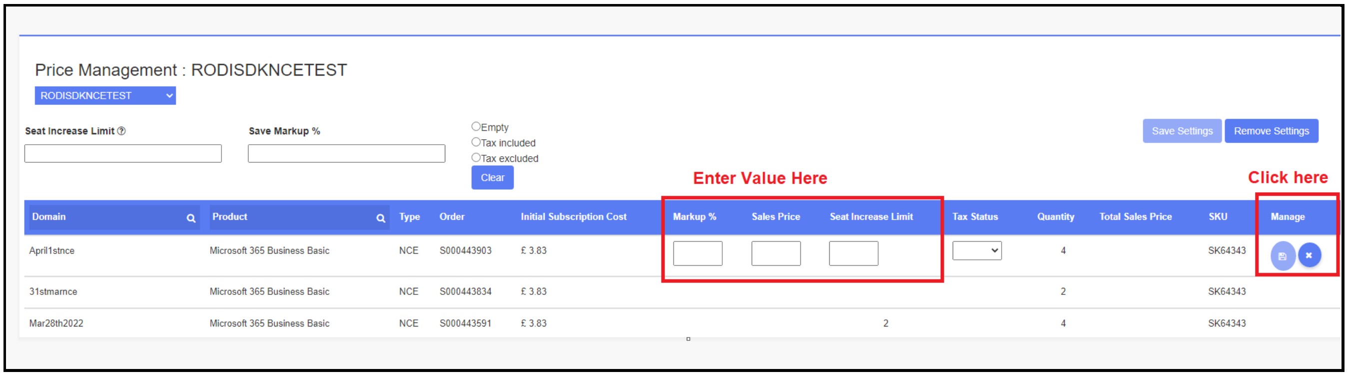
- Step 1: Select the company from the drop-down list on the price management page
- Step 2: Enter the values and click on 'Save Prices'
- Step 3: Select the 'Eye Icon' for Add-ons of particular order or domain (except for NCE Products)



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					4		SK64343	
31stmarnce	Microsoft 365 Business Basic	NCE	S000443834	£ 3.83					2		SK64343	
Mar28th2022	Microsoft 365 Business Basic	NCE	S000443591	£ 3.83			2		4		SK64343	

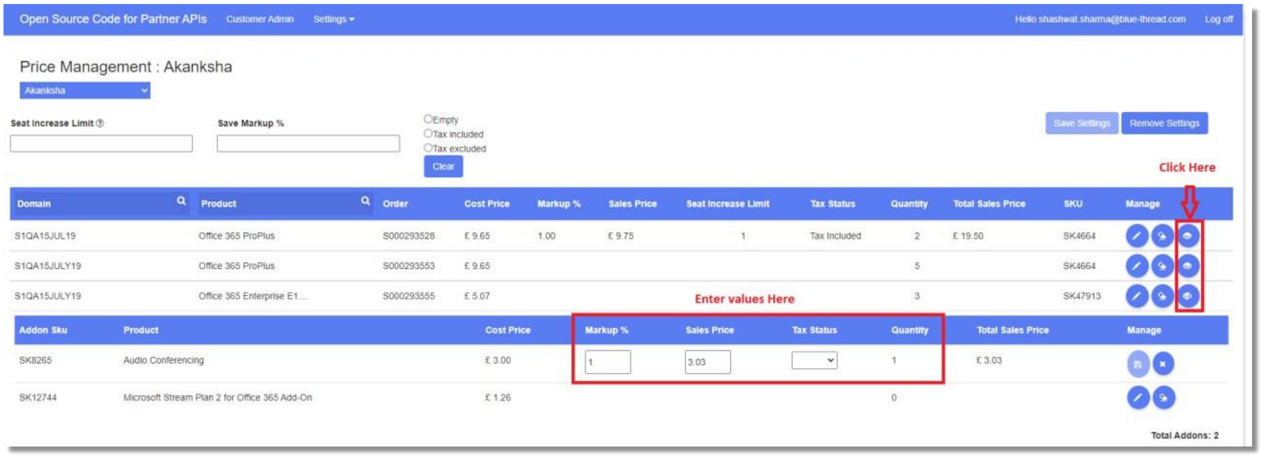
B. For a specific order or domain:

- 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.



c. For Add-ons of order or domain (Not for NCE Products):

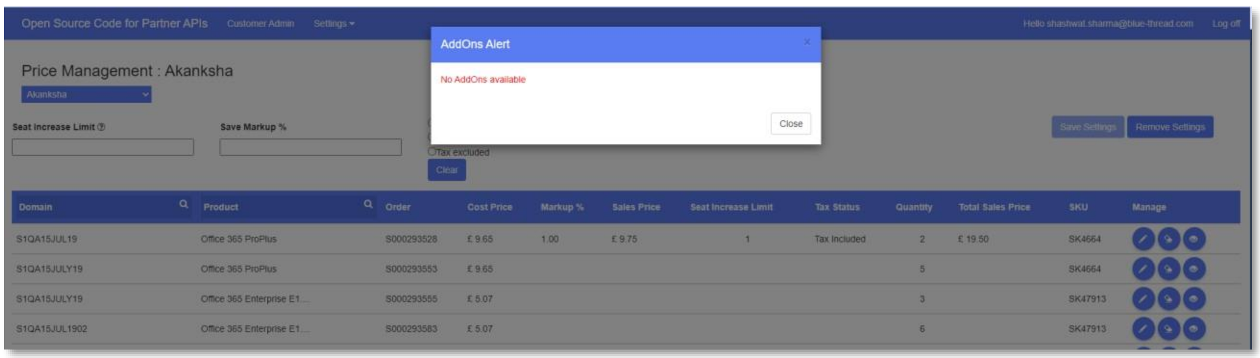
- Step 1: Select the company from the drop-down list on the price management page.
- Step 2: Select the desired order or domain
- Step 3: Now click on the manage column's 'Eye Icon'



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

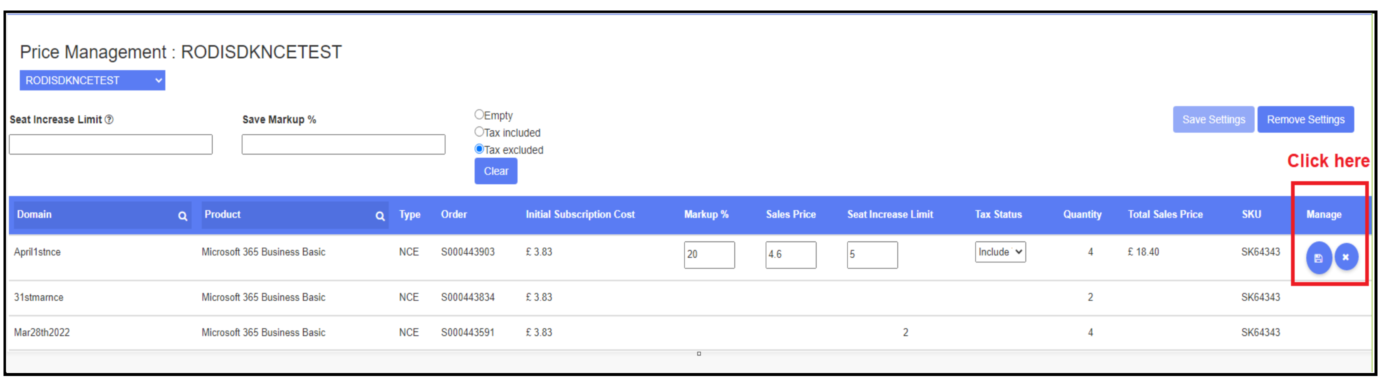
Step 5: you can click on 'Eraser Icon' to clear values at addon level as well.

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.



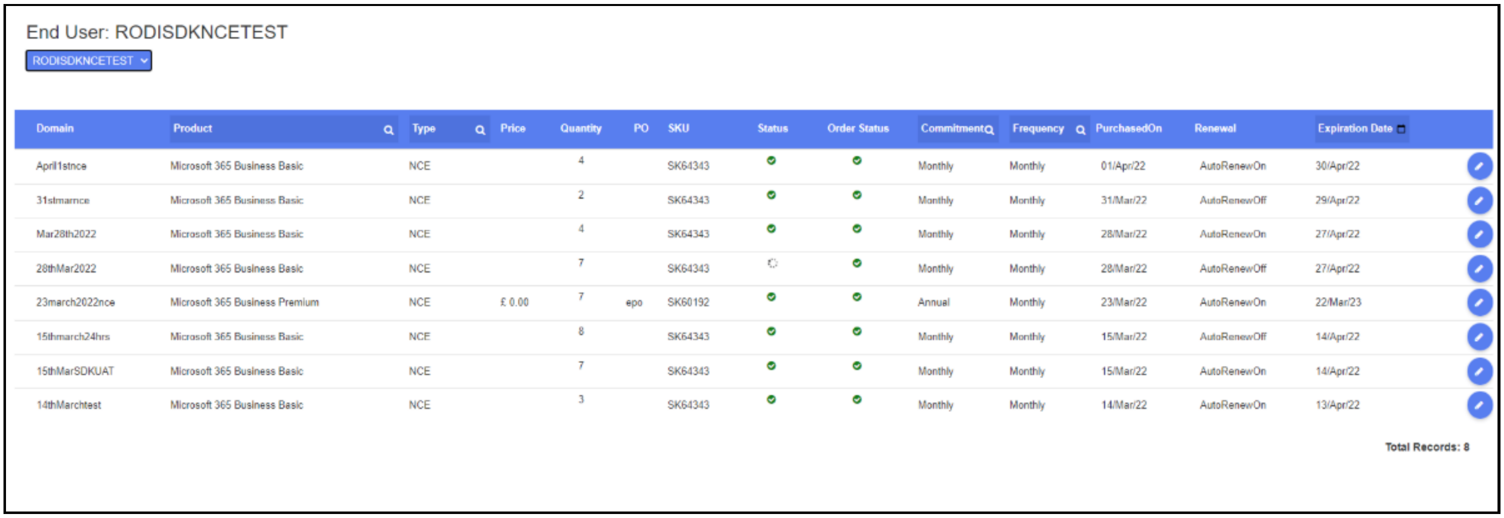
Important

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.



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.


End User: RODISDKNCETEST

RODISDKNCETEST

Domain	Product	Type	Price	Quantity	PO	SKU	Status	Order Status	Commitment	Frequency	PurchasedOn	Renewal	Expiration Date
April1stnce	Microsoft 365 Business Basic	NCE		4		SK64343			Monthly	Monthly	01/Apr/22	AutoRenewOn	30/Apr/22
31stmarnce	Microsoft 365 Business Basic	NCE		2		SK64343			Monthly	Monthly	31/Mar/22	AutoRenewOff	29/Apr/22
Mar28th2022	Microsoft 365 Business Basic	NCE		4		SK64343			Monthly	Monthly	28/Mar/22	AutoRenewOn	27/Apr/22
28thMar2022	Microsoft 365 Business Basic	NCE		7		SK64343			Monthly	Monthly	28/Mar/22	AutoRenewOff	27/Apr/22
23march2022nce	Microsoft 365 Business Premium	NCE	£ 0.00	7	epo	SK60192			Annual	Monthly	23/Mar/22	AutoRenewOn	22/Mar/23
15thmarch24hrs	Microsoft 365 Business Basic	NCE		8		SK64343			Monthly	Monthly	15/Mar/22	AutoRenewOff	14/Apr/22
15thMarSDKUAT	Microsoft 365 Business Basic	NCE		7		SK64343			Monthly	Monthly	15/Mar/22	AutoRenewOn	14/Apr/22
14thMarchtest	Microsoft 365 Business Basic	NCE		3		SK64343			Monthly	Monthly	14/Mar/22	AutoRenewOn	13/Apr/22

Total Records: 8

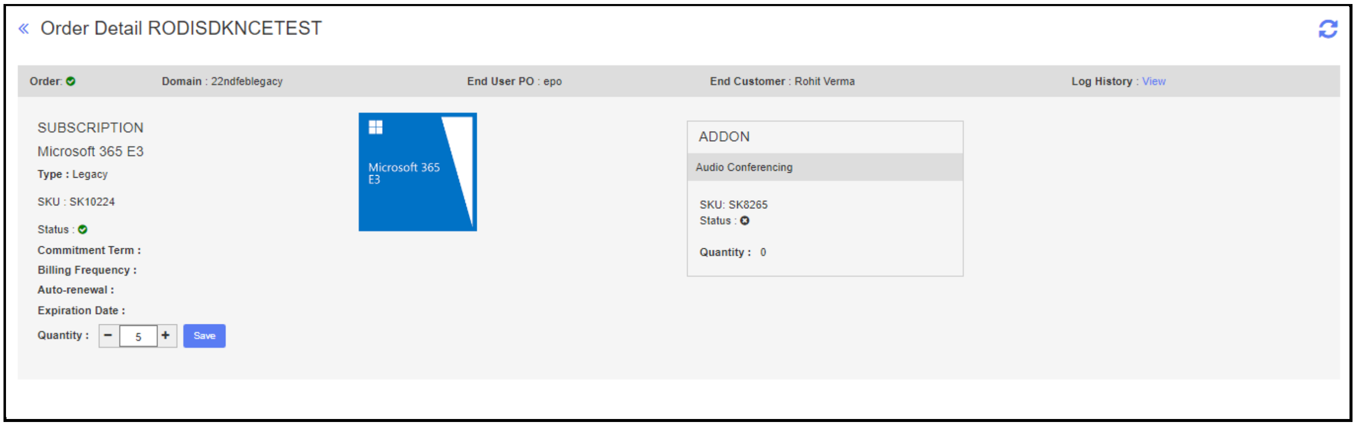
A table will show the below information.

- **Company:** Company name
- **Domain:** Domain of the order
- **Product:** Product name
- **Type:** Microsoft Product type
- **Price:** Price of the product
- **Quantity:** Number of seats
- **PO:** 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)
- **Commitment:** Commitment term
- **Billing Frequency:** Frequency of Billing
- **Purchased On:** Order 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



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
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 since the start of renewal date of the subscription.

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