



## Customer Portal SDK- StreamOne 1.5 . 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.

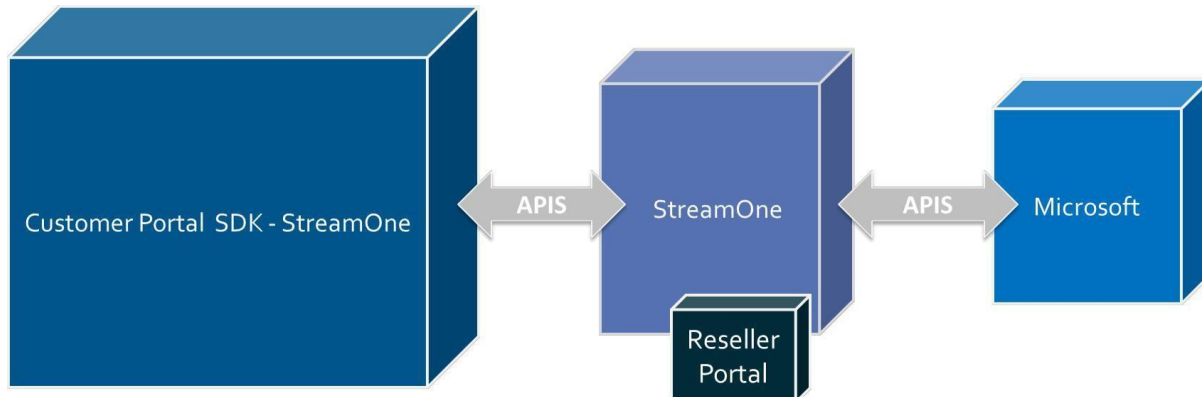
The Customer Portal does not replace StreamOne but offers an alternative environment for seat modification.

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 application 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 customised 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 (,).

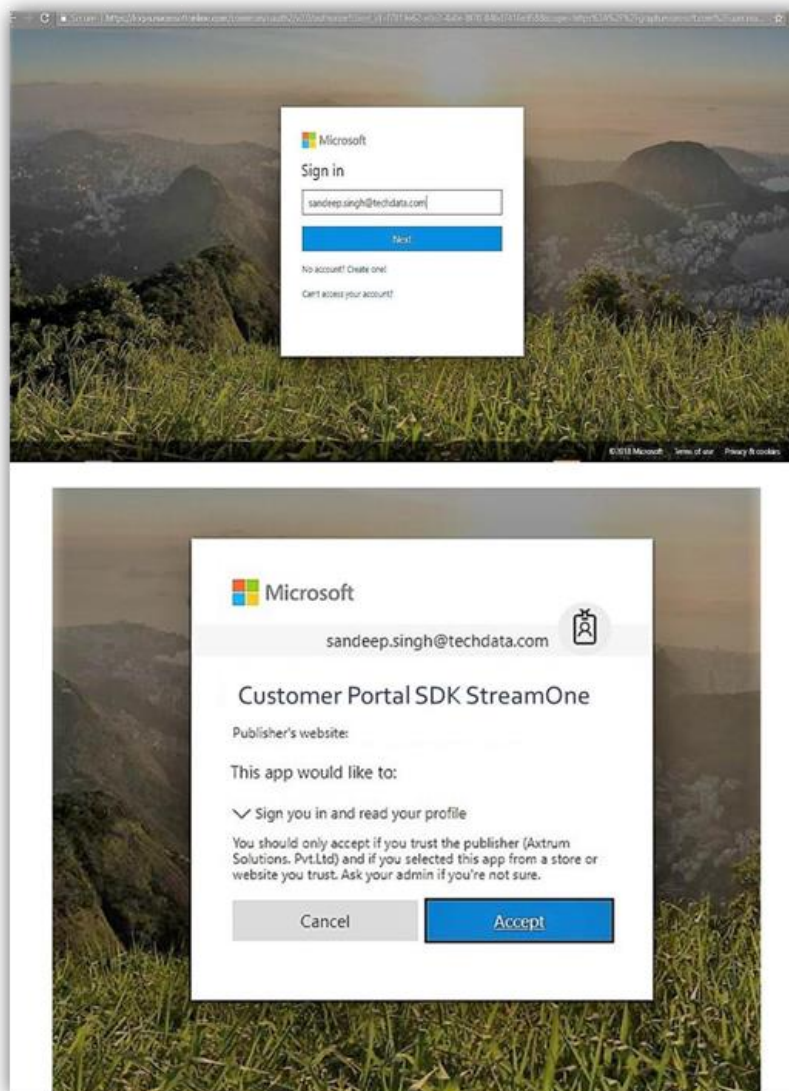
**Configuration Page URL:** <https://Domain.azurewebsites.net/configuration>

Configuration Settings	Value	Action
<b>APP CONFIGURATION</b>		
AppUrl	https://privatelabelite-integration.azurewebsites.net	Edit
AllowedResellers	Mateus.lutterbach@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
SCOIN	ORSXOMZUGUGOZTIPBSXGZJUNFXW44ZVG42DGOBV	Edit
client_id	*****	Edit
TokenOAuth	https://auth.techdata.eu/es/token/oauth2	Edit
client_secret	*****	Edit
<b>API CALLS</b>		
SubscriptionSearchUrl	https://partnerapi.tdstreamone.eu/order/subscriptions/	Edit
VendorCatalogSearchUrl	https://partnerapi.tdstreamone.eu/catalog/search/	Edit
VendorListUrl	https://partnerapi.tdstreamone.eu/catalog/vendors	Edit
ModifyAddOrUrl	https://partnerapi.tdstreamone.eu/order/addOrs	Edit
OrderDetailsUrl	https://partnerapi.tdstreamone.eu/order/details/	Edit
OrderModifyUrl	https://partnerapi.tdstreamone.eu/order/	Edit
OrderSearchUrl	https://partnerapi.tdstreamone.eu/order/search	Edit
CustomerSearchURL	https://partnerapi.tdstreamone.eu/endCustomer/search	Edit

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

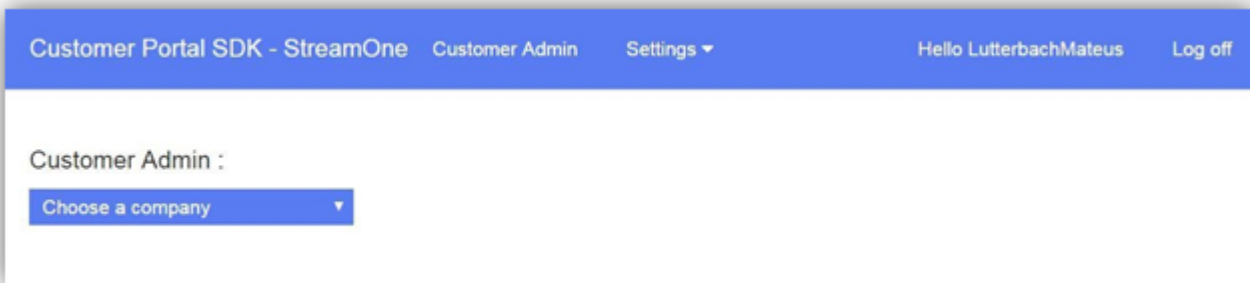
## Login Screens

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](#)

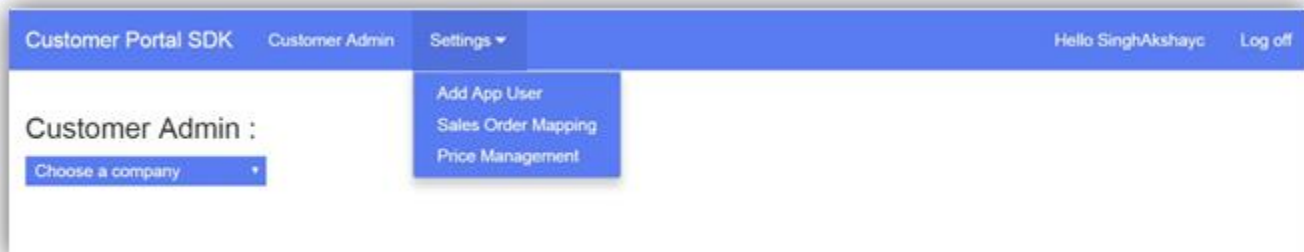
Create a user by adding a new email to access the app and link this email to a company name. To control the visibility those users have of their sales orders and their products you should go to:

[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.

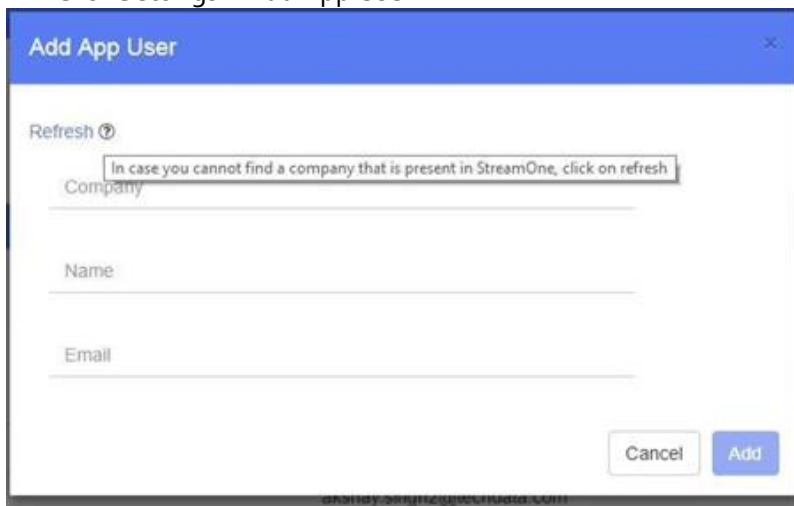
By clicking “Add App User” you will be directed to the app user management page where you can assign a company to the end user.

### App User Management

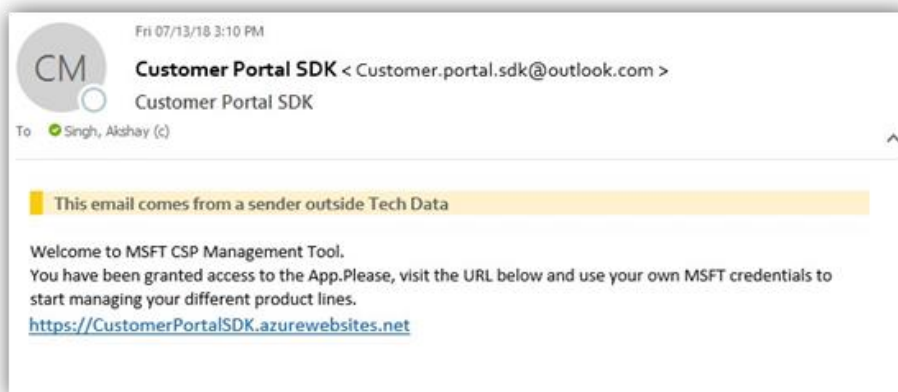
This page contains the list of users that belong to a company. Various actions can be performed;

#### 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
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

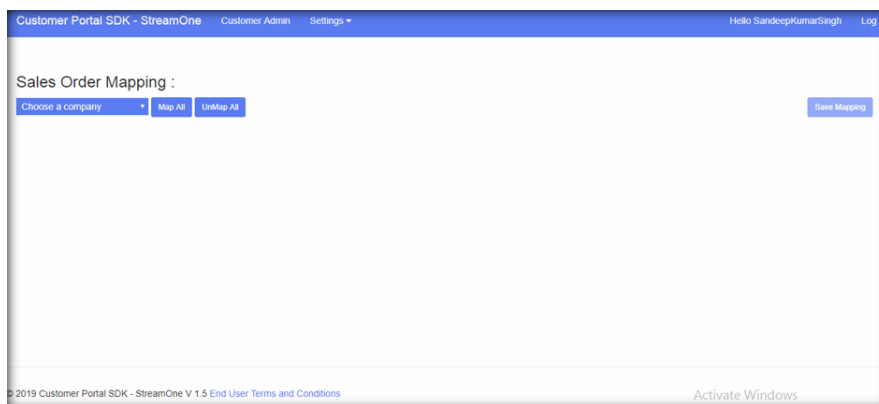


You also have the option to delete users from a company. Users with no access will not be able to see any orders when logged in.

## 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 License to the selected company.
  - b. Option 2 Can be used to do mapping for each CSP Licenses on respective page.

Domain	Order	Product	ResellerPO	SKU	Quantity	
12theshop	S000031848	Office 365 Business Essentials	2113	SK4660	5	<input checked="" type="checkbox"/>
test101215dec	S000032772	Office 365 Business Premium	PO12341	SK4662	2	<input checked="" type="checkbox"/>
	S000100014	Office 365 Business	1234	SK4661	1	<input checked="" type="checkbox"/>
MarcusTestCSP2	S000100018	Office 365 ProPlus	PO CSP2	SK4664	1	<input checked="" type="checkbox"/>
	S000100020	Office 365 Business	1234	SK4661	1	<input checked="" type="checkbox"/>
	S000100029	Office 365 Business Essentials	po_12121	SK4660	2	<input checked="" type="checkbox"/>
test180115	S000100068	Office 365 Business Essentials	12234	SK4660	1	<input checked="" type="checkbox"/>

3. Click Save Mapping

Customer Portal SDK - StreamOne Customer Admin Settings

Hello SandeepKumarSingh Log off

Sales Order Mapping : ALL

ALL Map All UnMap All Save Mapping

Domain	Order	Product	ResellerPO	SKU	Quantity
12theshop	S000031848	Office 365 Business Essentials	2113	SK4660	5
test101215dec	S000032772	Office 365 Business Premium	PO12341	SK4662	2
	S000100014	Office 365 Business	1234	SK4661	1
MarcusTestCSP2	S000100018	Office 365 ProPlus	PO CSP2	SK4664	1
	S000100020	Office 365 Business	1234	SK4661	1
	S000100029	Office 365 Business Essentials	po_12121	SK4660	2
test180115	S000100068	Office 365 Business Essentials	12234	SK4660	1

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

### Customer Admin




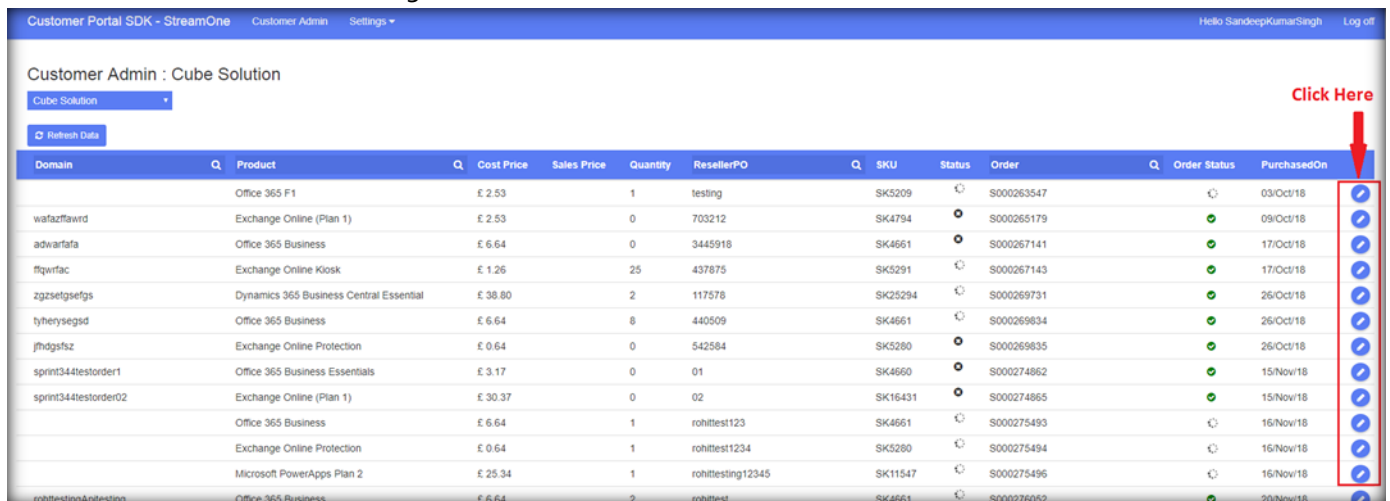
To see CSP licenses please choose a company from the dropdown list:
















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
- **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

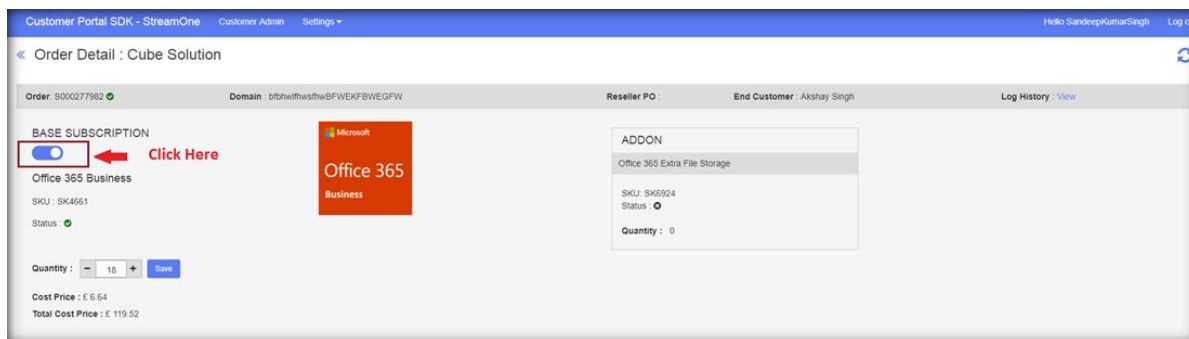
There is Edit icon (  ) on the right which allows for seat modification.



Domain	Q	Product	Q	Cost Price	Sales Price	Quantity	ResellerPO	Q	SKU	Status	Order	Q	Order Status	PurchasedOn	
		Office 365 F1		£ 2.53		1	testing		SK5209		S000263547			03/Oct/18	
wafazfawrd		Exchange Online (Plan 1)		£ 2.53		0	703212		SK4794		S000265179			09/Oct/18	
adwarfafa		Office 365 Business		£ 6.64		0	3445918		SK4661		S000267141			17/Oct/18	
ftqwrfac		Exchange Online Kiosk		£ 1.26		25	437875		SK5291		S000267143			17/Oct/18	
zgzsetgsefgs		Dynamics 365 Business Central Essential		£ 38.80		2	117578		SK25294		S000269731			26/Oct/18	
tyherysegsd		Office 365 Business		£ 6.64		8	440509		SK4661		S000269834			26/Oct/18	
jhdgsfsz		Exchange Online Protection		£ 0.64		0	542584		SK5280		S000269835			26/Oct/18	
sprint344testorder1		Office 365 Business Essentials		£ 3.17		0	01		SK4660		S000274862			15/Nov/18	
sprint344testorder02		Exchange Online (Plan 1)		£ 30.37		0	02		SK16431		S000274865			15/Nov/18	
		Office 365 Business		£ 6.64		1	rohlttest123		SK4661		S000275493			16/Nov/18	
		Exchange Online Protection		£ 0.64		1	rohlttest1234		SK5280		S000275494			16/Nov/18	
		Microsoft PowerApps Plan 2		£ 25.34		1	rohlttesting12345		SK11547		S000275496			16/Nov/18	
rohlttestingApTesting		Office 365 Business		£ 6.64		2	rohlttest		SK4661		S000276052			20/Nov/18	


## Order Details Page

Activation and Suspension option available along with the Product Images




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

**BASE SUBSCRIPTION**

 **Click Here**

Office 365 Business

SKU: SK4661

Status: 

Quantity:


Cost Price: £ 6.64

Total Cost Price: £ 119.52

**ADDON**

Office 365 Extra File Storage

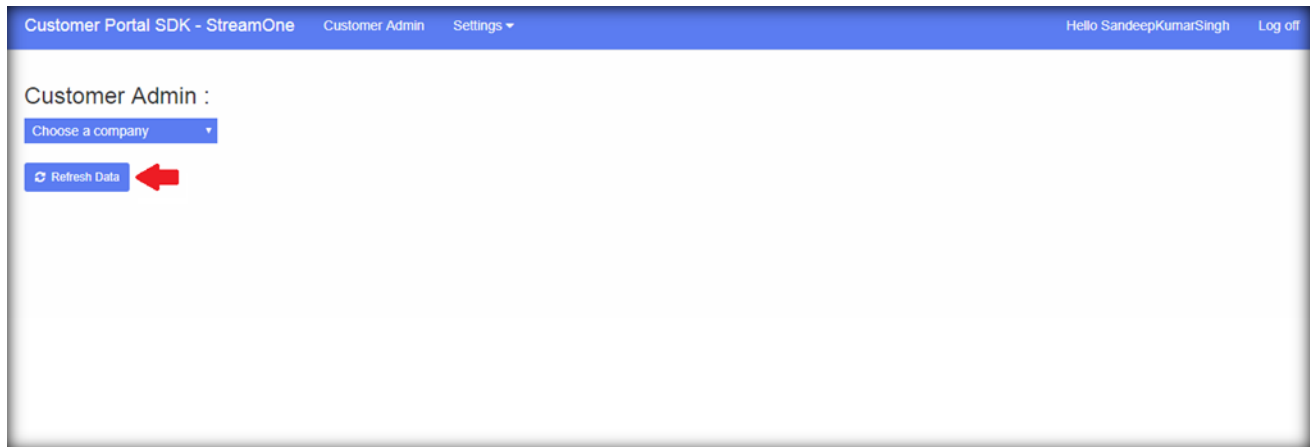
SKU: SK6924

Status: 

Quantity: 0

[Refresh Data](#)

You must click on "Refresh Data" regularly to see the most up to date list of sales order and companies. Please be aware that there is a loading time for new data.



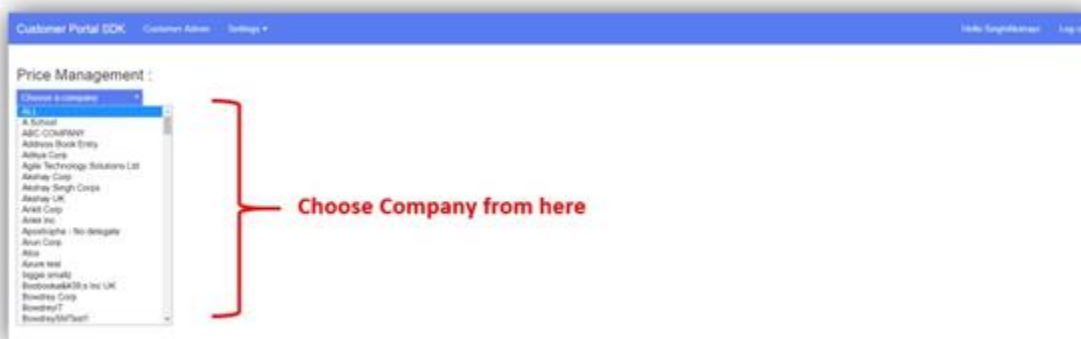
### Search

You can use the search option to see the list of orders that belong to a company. The search functionality is dynamic in nature, as you start typing it will pull the results with the closest match.

### 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"

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

Price Management : ALL

ALL

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
12theshop	Office 365 Business Essentials	S000031848	£ 2.61			22		5		SK4660	<input type="button" value="edit"/> <input type="button" value="delete"/>
test101215dec	Office 365 Business Premium	S000032772	£ 6.54			22		2		SK4662	<input type="button" value="edit"/> <input type="button" value="delete"/>
	Office 365 Business	S000100014	£ 5.86			22		1		SK4661	<input type="button" value="edit"/> <input type="button" value="delete"/>
MarcusTestCSP2	Office 365 ProPlus	S000100018	£ 8.52			22		1		SK4664	<input type="button" value="edit"/> <input type="button" value="delete"/>
	Office 365 Business	S000100020	£ 5.86			22		1		SK4661	<input type="button" value="edit"/> <input type="button" value="delete"/>
	Office 365 Business Essentials	S000100029	£ 2.61			22		2		SK4660	<input type="button" value="edit"/> <input type="button" value="delete"/>
test180115	Office 365 Business Essentials	S000100068	£ 2.61			22		1		SK4660	<input type="button" value="edit"/> <input type="button" value="delete"/>
UKGET03030102	Office 365 Business Essentials	S000100985	£ 2.61			22		1		SK4660	<input type="button" value="edit"/> <input type="button" value="delete"/>

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'

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

Price Management : ALL

ALL

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
12theshop	Office 365 Business Essentials	S000031848	£ 2.61	<input type="text"/>	<input type="text"/>	<input type="text" value="22"/>	<input type="text"/>	5		SK4660	<input type="button" value="edit"/> <input type="button" value="delete"/>
test101215dec	Office 365 Business Premium	S000032772	£ 6.54			22		2		SK4662	<input type="button" value="edit"/> <input type="button" value="delete"/>
	Office 365 Business	S000100014	£ 5.86			22		1		SK4661	<input type="button" value="edit"/> <input type="button" value="delete"/>
MarcusTestCSP2	Office 365 ProPlus	S000100018	£ 8.52			22		1		SK4664	<input type="button" value="edit"/> <input type="button" value="delete"/>
	Office 365 Business	S000100020	£ 5.86			22		1		SK4661	<input type="button" value="edit"/> <input type="button" value="delete"/>
	Office 365 Business Essentials	S000100029	£ 2.61			22		2		SK4660	<input type="button" value="edit"/> <input type="button" value="delete"/>
test180115	Office 365 Business Essentials	S000100068	£ 2.61			22		1		SK4660	<input type="button" value="edit"/> <input type="button" value="delete"/>

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

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

Price Management : ALL

ALL

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
12theshop		Office 365 Business Essentials		S000031848	£ 2.61	<input type="text"/>	<input type="text"/>	<input type="text" value="22"/>	<input type="text"/>	<input type="text" value="5"/>		SK4660	<input type="button" value="+"/> <input type="button" value="x"/>
test101215dec		Office 365 Business Premium		S000032772	£ 6.54			<input type="text" value="22"/>		<input type="text" value="2"/>		SK4662	
		Office 365 Business		S000100014	£ 5.86			<input type="text" value="22"/>		<input type="text" value="1"/>		SK4661	
MarcusTestCSP2		Office 365 ProPlus		S000100018	£ 8.52			<input type="text" value="22"/>		<input type="text" value="1"/>		SK4664	
		Office 365 Business		S000100020	£ 5.86			<input type="text" value="22"/>		<input type="text" value="1"/>		SK4661	
		Office 365 Business Essentials		S000100029	£ 2.61			<input type="text" value="22"/>		<input type="text" value="2"/>		SK4660	
test100115		Office 365 Business Essentials		S000100029	£ 2.61			<input type="text" value="22"/>		<input type="text" value="1"/>		SK4660	

### 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 Domain

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:


Company	Domain	Product	Q	Price	Quantity	End User PO	SKU	Status	Order Status	Purchased On	
Cube Solution	dcsf5f5af5efefef	Office 365 Business			4	CompuLab	SK4961			28/Nov/18	
Cube Solution	adwafafa	Office 365 Business			0	Alpiq	SK4961			17/Oct/18	
Cube Solution		Microsoft PowerApps Plan 2			1		SK11547			16/Nov/18	
Cube Solution		Exchange Online Protection			1		SK5280			16/Nov/18	
Cube Solution	sgwswswgsg	Microsoft 365 E3			1	Testing Orders	SK16434			19/Dec/18	
Cube Solution	jhdgsfz	Exchange Online Protection			0	Alpiq	SK5280			26/Oct/18	
Cube Solution		Office 365 F1			1	12345	SK5209			03/Oct/18	
Cube Solution	sprint344testorder02	Exchange Online (Plan 1)			0	02	SK16431			15/Nov/18	
Cube Solution	tyherysegd	Office 365 Business			8	ACTIVIUM	SK4961			26/Oct/18	

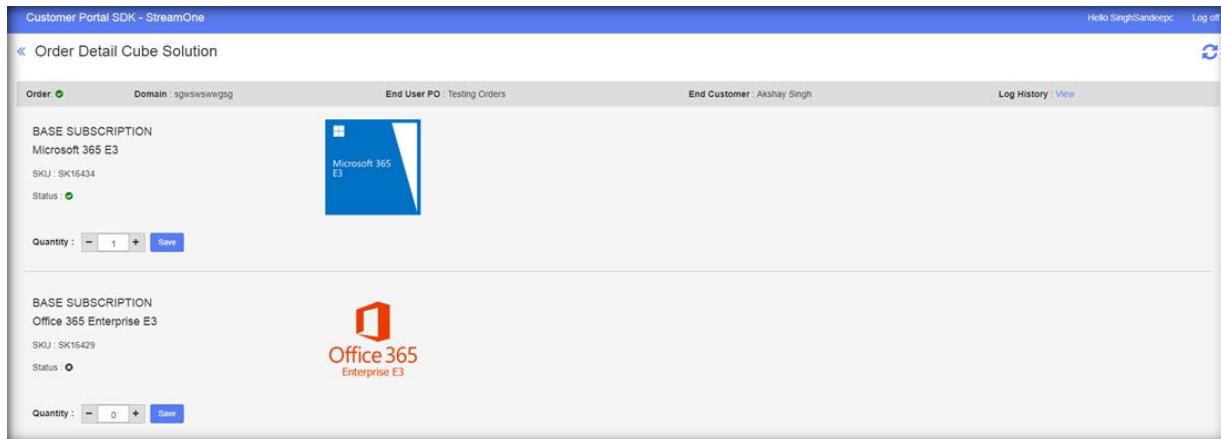
A table will show the below information.


- **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: D1, 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

Shared Tier, D1. 1 GB RAM, 1 GB Storage



Azure SQL Database

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

## COST ESTIMATION



~USD18.00/MONTH (List Price, VAT Excluded)