MYOB Advanced Business
Quick Guide
Customer Portal

Cloud Solutions
for Bigger Business

MYOB Advanced Live

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Introduction

This quick guide discusses how to set up and use the Customer Portal in order to understand what is possible to be achieved within the Portal setup.

The Customer Portal is available at each different Licence level, from Standard to Enterprise, however the features available in each of these areas will vary. This Quick Guide will be analysing the possibilities from an Enterprise point-of-view so if there are some areas viewed on here you are not able to access, please check this isn't restricted by your Licence type.

This quick guide takes screen shots from and was tested using MYOB Advanced Business, Enterprise Edition 2015.3.1.

Customer Portal Provisioning

There are two different environments which we will cover on how to set up the Customer Portal – A locally installed Partner copy, and creating a Portal for your live site or hosted Partner site.

Live Site Provisioning

In order to request a Customer Portal to be created for your live site or hosted Partner site, you must create a Service Request in Archie requesting the creation of a Portal site.

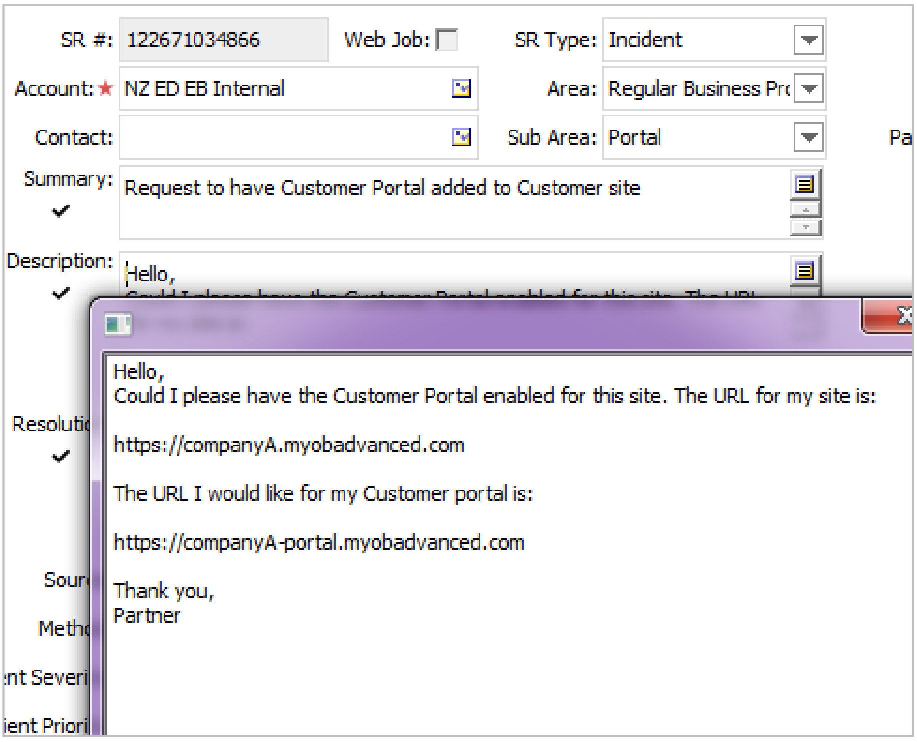


Figure: Customer Portal request should look like in Archie

Local Install

To create a Customer Portal to use on your locally installed copy of Advanced Business, you will need to start up the MYOB Advanced Configuration installer.

Prerequisites:

- You must have already set up the database in which you want to attach the Customer Portal
- The database must be on the same version as the Customer Portal

Installation Steps:

1. Click on Deploy New Application Instance.

   (We will be deploying a new site/instance but linking to an existing database.)

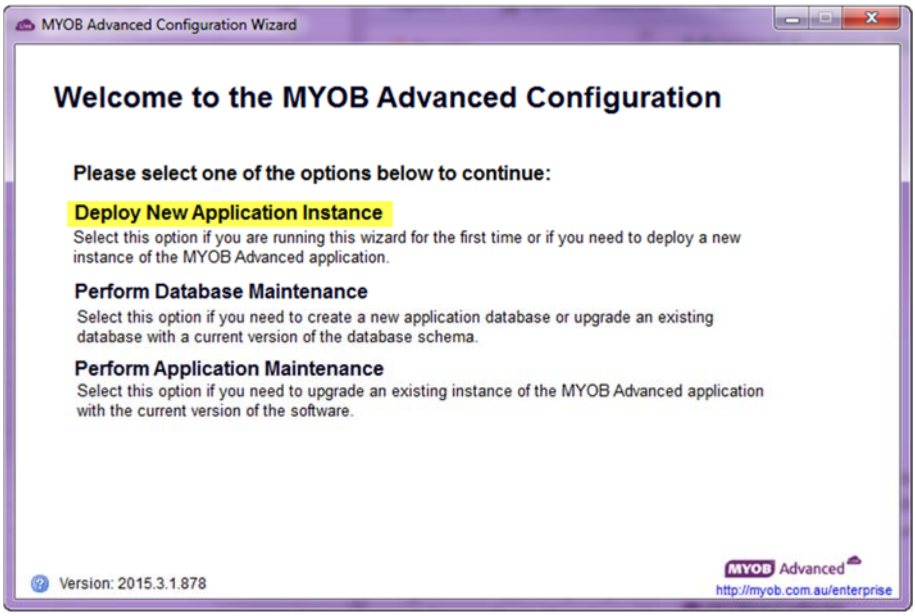


Figure: The New Application Instance stage

2. At the Database Server Connection stage, select the server where your database is deployed and enter any necessary credentials.
3. At the Database Configuration stage, you will need to select 'Connect to an existing database' and select the database you want the Portal to be connected.

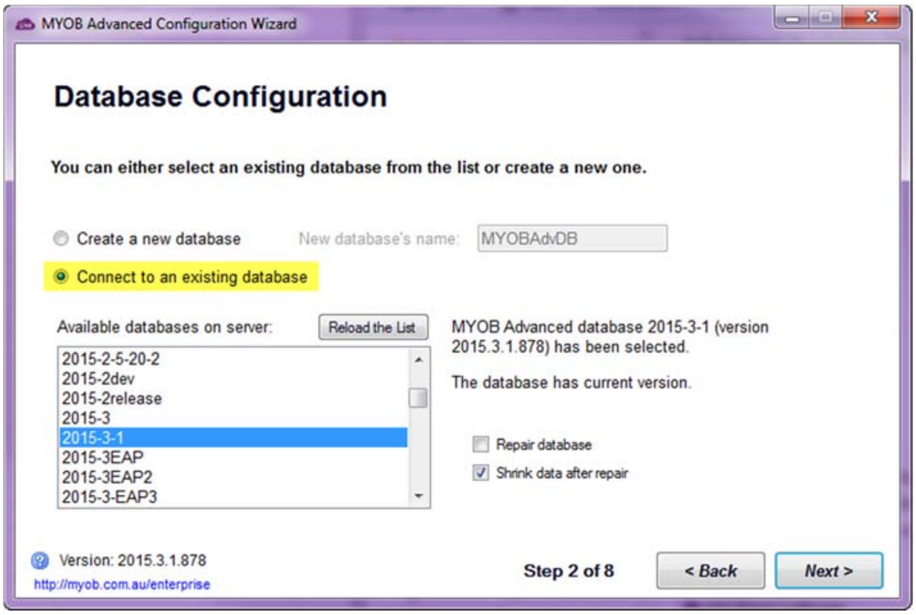


Figure: Ensure you're connecting to the existing database where you want the Portal deployed

4. On the Company Setup stage you do not want to add any new companies, click Next.
5. On the Database Connection stage, if you need to enter credentials here, please enter them; otherwise click Next.
6. We have come to the Instance Configuration stage. This is where you need to select the 'Create Portal' option. Tick this box and ensure the Instance name is something that will be easily recognised – this will form the URL which the portal will be accessed on and must be different to the ERP site. Click Next.

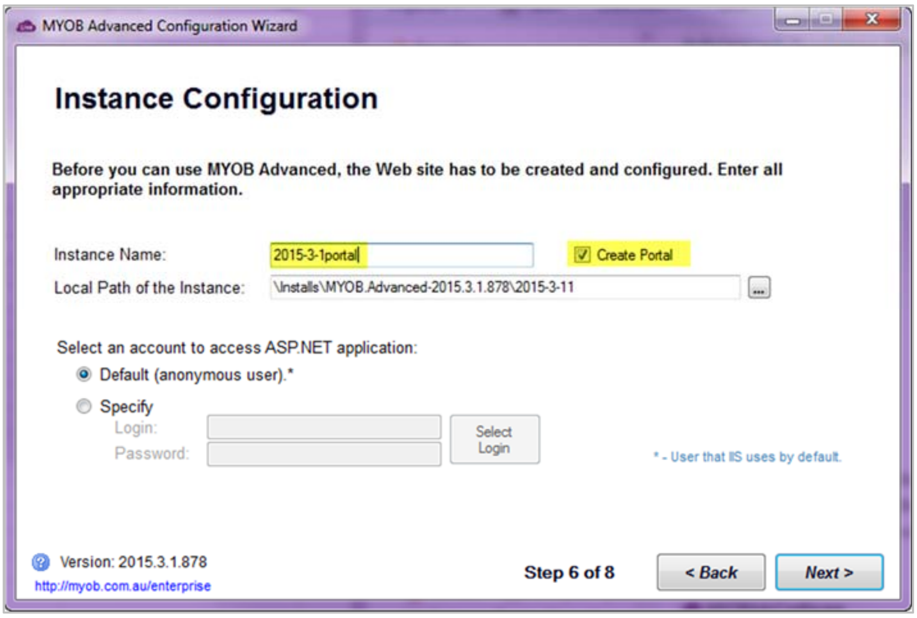


Figure: Instance Configuration mandatory fields

7. At the Web Site Configuration stage we can review the Portal name and ensure your Web Site and Application Pool settings are correct. Please ensure these are correct and click Next.
8. Finish and allow the Portal to be created.

Once the installation has completed, you will need to log into the Portal site as 'admin' to enter in your MAK key. Once this has been completed, you will have full access to your Portal site.

Setting up the Customer Portal

In order to use the Customer Portal, individual Customers will need to be set up as users. The Portal link is accomplished on a Contact – a Contact is linked to the specific Business Account and also to the User profile which is created – and this is how you are able to manage the Portal interactivity.

It is worth noting that all ERP users with a Full licence will be able to access the Customer Portal with their existing credentials but they will not be able to see any individual customer details as the screens have been specifically created to filter by the attached Business Account details – which an Employee cannot be linked to.

Enable/Disable Features

In order to enable the Customer Portal, as well as the features inside the Customer Portal, you will first need to turn on the features inside **Enable/Disable Features** form (CS.10.00.00). If these features are not turned on, they will not be available to use on the Customer Portal.

Figure: Customer Portal Features enabled

Case Management on Portal is an Enterprise edition feature.

Portal Preferences

Now that the Portal has been created and turned on, you will need to set up the default values. This is done primarily at the **Portal Preferences** form (SP.80.00.00). Some of these values are mandatory and some are set up as restrictions to prevent transacting in the incorrect area. The Portal Preferences are explored below:

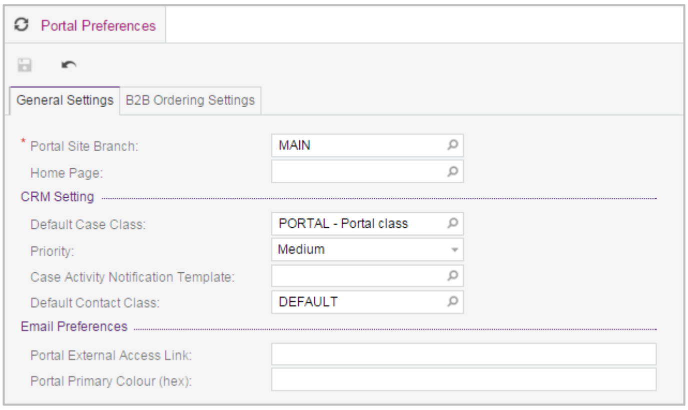


Figure: Portal Preferences

Field	**Description**
General Settings Tab	
Portal Site Branch:	This is where the default branch for the Portal is selected. The Portal is run on a branch-by-branch basis.
Default Case Class:	If Case Management is enabled for the Portal, you will need to assign the Default Case Class for any new Cases created on the Portal. The only Case Classes available to select are those without the 'Internal' tick selected.
CRM Settings	
Default Contact Class:	If allowing the Customer Portal to be used to maintain Contact lists, this is used to determine the default Contact Class of a newly added Contact on the Portal.
Priority:	The default case priority. Options available: *Low, Medium* and *High.*
Case Activity Notification Template:	Notification template advising changes made by customers to their cases that will be sent to the case owner.
Default Contract Class	This is the default contact class that will be assigned to cases.
Email Preferences Section	
Portal External Access Link:	If a user account is a *guest account* this is the URL that will be included in the log in and password recovery emails and will also be included in emails sent to new users.

B2B Ordering Settings tab

This tab will only be available if you have the ‘B2B Ordering’ option selected on Enable/Disable Features.

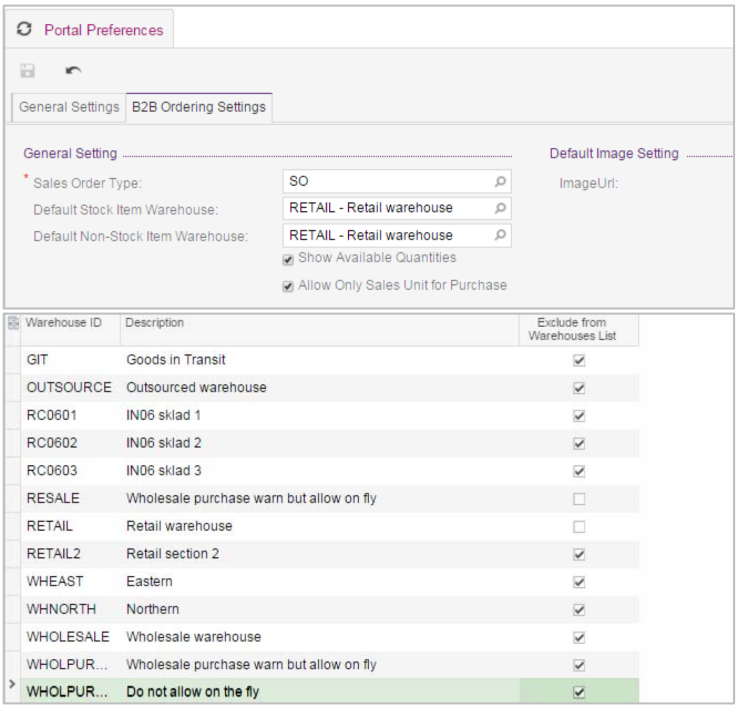


Figure: B2B Ordering tab

Field	**Description**
General Settings	
Sales Order Type:	This is the Sales Order Type that Portal Sales Orders will be created under. You can set these to go through as Quotes, as a normal Sales Order, or in Enterprise edition you can create a brand new Sales Order Type altogether for Portal Sales Orders.
Default Stock/Non-Stock Item Warehouse:	Used to populate the Warehouse used when creating a Portal Sales Order. Useful if Portal users are restricted from changing the stock item’s default warehouse location.
Show Available Quantities:	A checkbox when ticked will show the current stock levels in the current warehouse or all warehouses for each stock item.
Allow Only Sales Unit for Purchases:	If this checkbox is ticked the customer can only order items in the unit of measure used as sales units for that item.
Table – All available warehouses will show in this list.	
Warehouse ID:	Warehouse identifier
Description:	The description of the warehouse.
Exclude from Warehouse List:	To stop customers accessing the selected warehouse tick this checkbox.

Creating a Portal user

Creating a Portal user is best accomplished at the Contacts form (CR.30.20.00). You may also create a User account to be linked to a Contact on the Users page (this is out of scope of this document).

In order for the Contact to operate the Customer Portal effectively, they should be linked to a Business Account. This will allow them to see all the invoices and statements available for that Business Account, as well as create Cases and Sales Orders (if these have been enabled).

If a Contact is linked to a Business Account which operates as a Parent in a Parent-Child relationship, all the invoices and statements of the Child Business Account will also be available on the Customer Portal.

1. Go to the Contacts screen and select an existing contact. Ensure there is an e-mail address listed.

   If you want to add a new contact; create a new contact and ensure the contact is linked to a Business Account.

2. Go into the User Info tab; this is where the Portal account is created. Click into the User Type field and select ‘Unrestricted External User’, at which point more options will become available. The default username will be the contact’s e-mail address and the password will be auto-generated, you may change both of these values as you see fit, however, once you Save, the username cannot be changed unless you delete the User.
3. Ensure you have the ‘Portal User’ role selected. This user role is what provides access to the Portal itself for a non-licenced user.

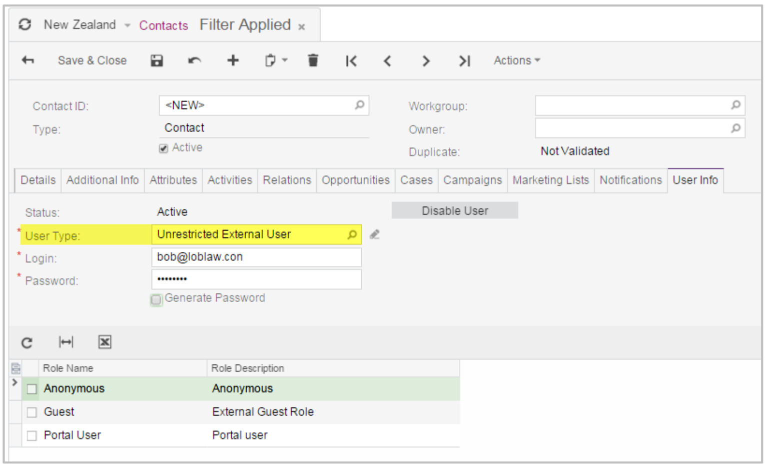


Figure: User Info tab on Contacts

Once the User has been created, you may log in to the Portal site with the user account created.

Portal Management

Statements

The Statements screen shows a summary of statements which have been generated for the customer from the ERP system. The Portal user will be able to set a date range to filter which statements they can see as well as seeing the current statement balance and the amount which was overdue at the time of the statement being created.

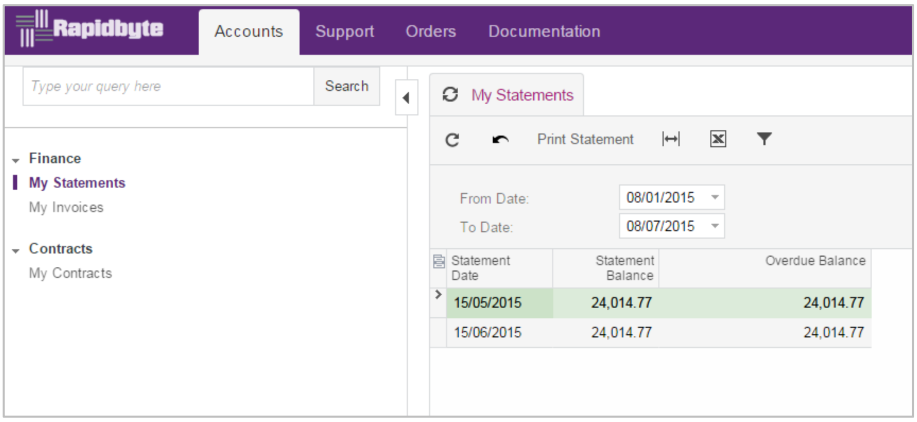


Figure: My Statements screen on the Portal

From this screen customers will also be able to print a copy of the statement that was created, the statement used will be the latest version of the report (AR.64.15.00).

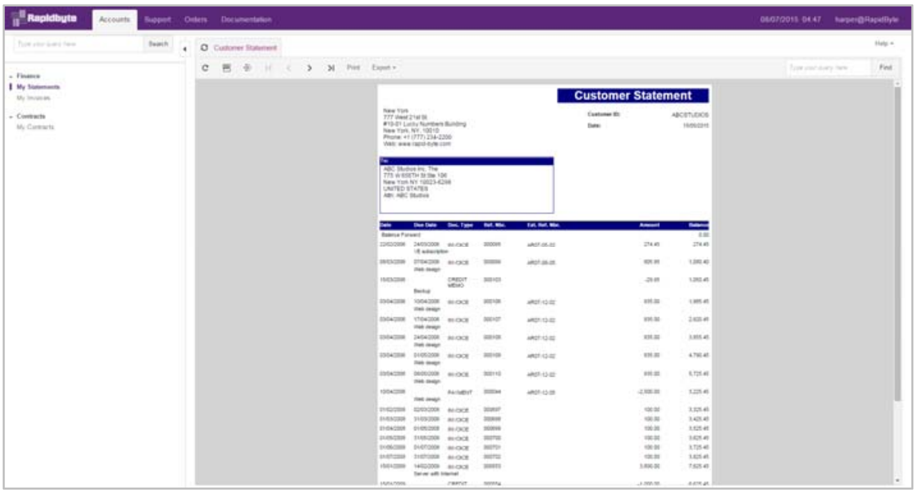


Figure: Statement printed on the Portal

Invoices

The Invoices screen shows a list of invoices which have been created for the customer from the ERP system. The screen will show the total balances of Open Invoices as well as showing the Credit Limit available for the customer.

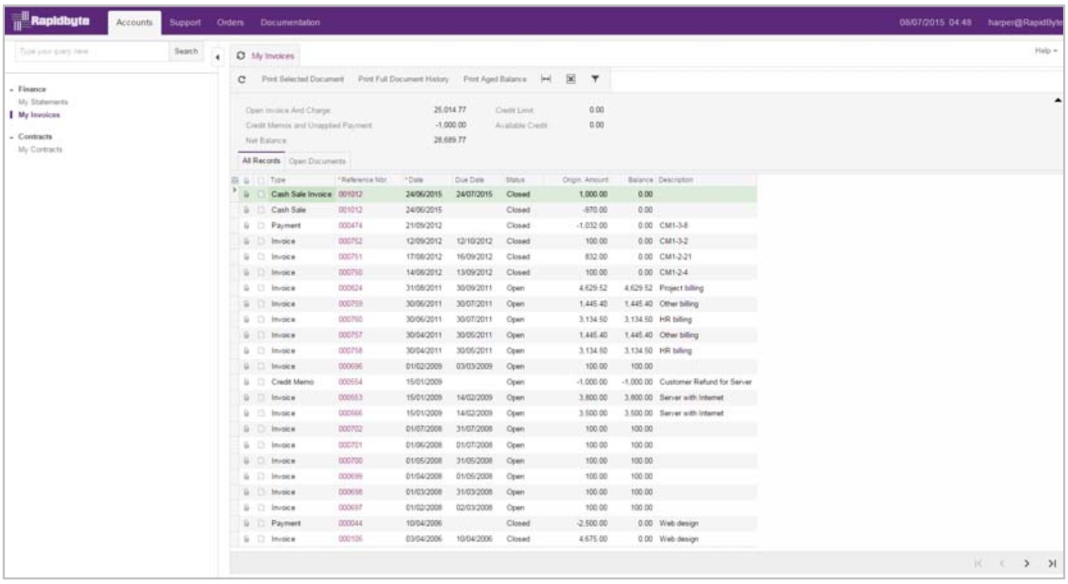


Figure: My Invoices screen on the Portal

The Portal user is also able to select from the available list of filters to see all invoices that have been created or to restrict it down to just the open documents. If the Portal user selects an individual invoice, they will get a pop-up copy of the invoice.

The Portal user also has the option to print the selected invoice at top of the screen, to print a full document history, or to print an Aged Balance report

Cases

There are three different areas to review Cases on the Customer Portal, depending on the stage of the Case involved.

- New Case
- Open Cases
- Closed Cases

In addition to the normal Role-level security that can be applied to each of these screens, Cases will only appear if the Case Class which is attached to the case does not have the 'Internal' flag selected. This allows internally raised cases that you wish to remain private from being available for external customers to see.

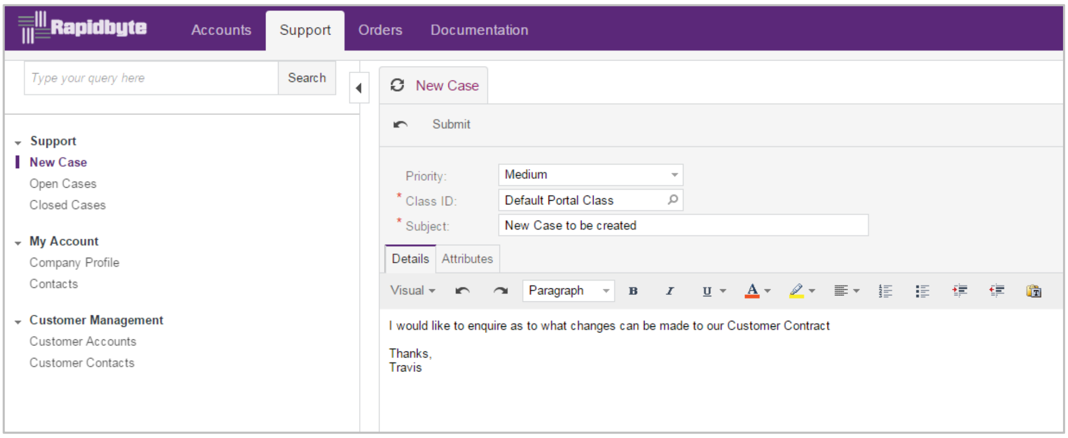


Figure: New Case screen on the Portal

New Case:

This is a screen which allows Portal users to enter in a new case to go directly into the logging system in the ERP. Users have the opportunity to enter in a priority, Class ID, as well as any information which may be relevant to the case itself. Users can then submit the case which will populate their information into a Case screen. This screen allows Users to see the progress of the case as well as add new information or close the case themselves.

Open & Closed Cases:

The Open Cases screen shows a summarised list of all Cases with the status of 'New' or 'Open'. If Users want to see more detail they can click on the Case ID to open up a screen to show more detail of the case itself.

The Closed Cases screen shows the same format of listing as the Open Cases screen, however, the Cases which show here will have the status of 'Closed'.

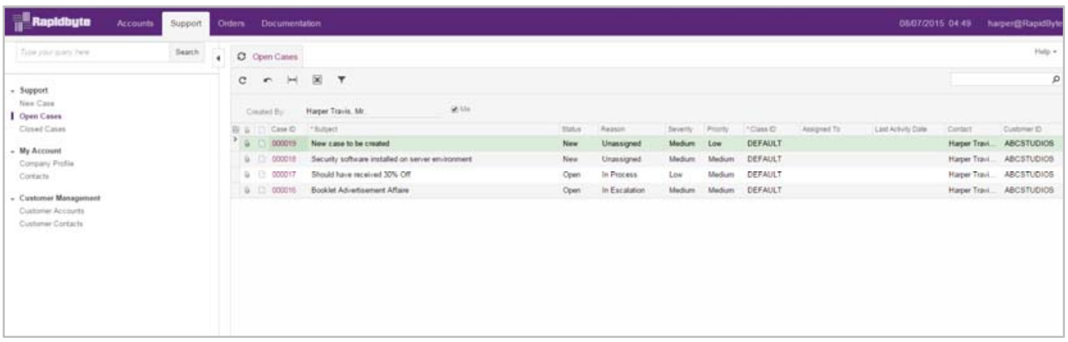


Figure: Open Cases screen on the Portal

Cases are an Enterprise-only feature and will only be visible if the site licence is for Enterprise and the feature has been turned on in Enable/Disable Features.

Customer Account Management

Portal users are able to view and maintain their own details with the following screens:

- Company Profile
- Contacts
- My Contracts

Company Profile

The Company Profile screen is used to update and adjust the phone, e-mail and address details of the Portal user's company.

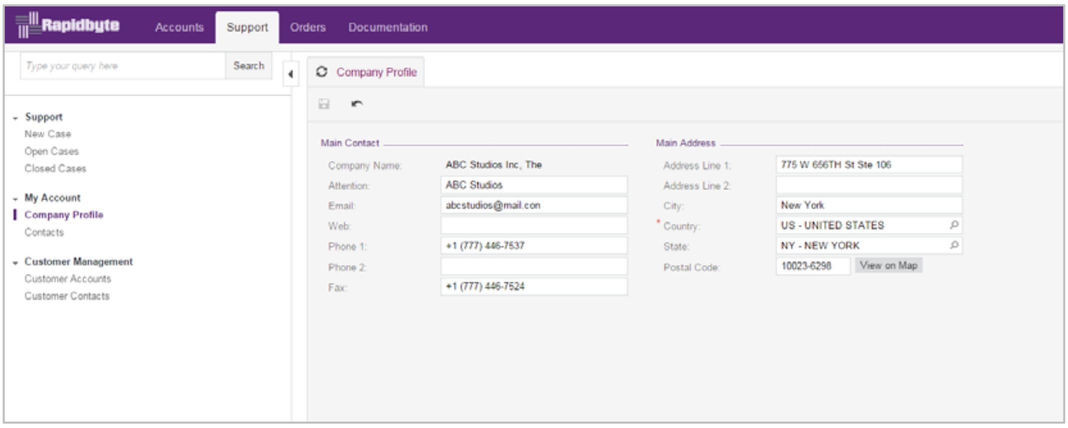


Figure: Company Profile screen on the Portal

The Contacts screen is a way of viewing all the other Contacts that have been set up with the company as a whole, not just those who have a login to the Customer Portal. Portals users with sufficient access will be able to inactivate contacts who they no longer want to have access to the company or Portal from this screen.

Contracts

The My Contracts screen allows Portal users the ability to review current contracts which have been set up on the ERP system.

Contracts are an Enterprise-only feature and will only be visible if the site licence is for Enterprise and the feature has been turned on in Enable/Disable Features.

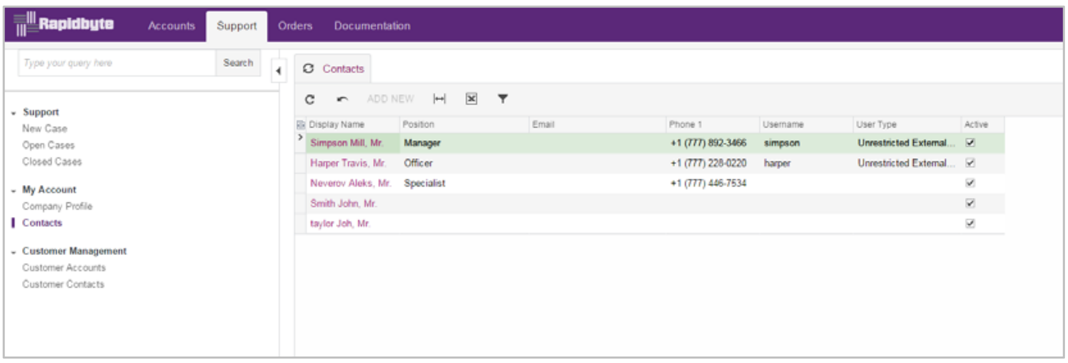


Figure: Contacts screen on the Portal

Sales Orders – Setup

The MYOB Advanced Customer Portal has a feature which allows Portal users to be able to enter in new Sales Orders from a list of items which has been made available on an Item Catalogue.

In order to make the most of this feature, some configuration must be performed in the system to provide some default settings.

- Portal Site Branch
- Sales Order Type
- Default Subitem (If turned on)
- Default Stock/Non-Stock Warehouse

As well as some optional features:

- Show Available Quantities
- Allow Only Sales Unit for Purchase
- Excluded Warehouses

The Portal Site Branch will be the branch that all transactions created from the Portal will be processed in. The Sales Order Type is the Sales Order that will be created when a Sales Order has been submitted from the Customer Portal. This allows you to select whether your customers can place Sales Orders directly into your ERP system or whether the orders are created as Quotes and processed further by your internal staff.
In the Enterprise edition, you are able to create a Portal Sales Order to track all orders created from the Customer Portal.

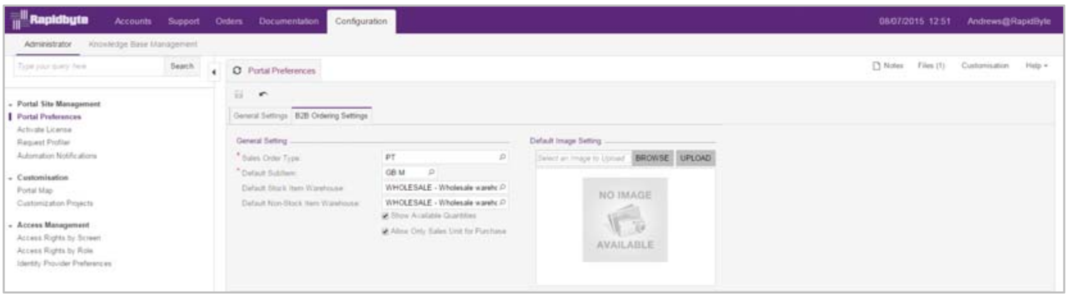


Figure: B2B Ordering tab on the Portal Preferences

The default Warehouse will be what appears on your Portal user's shopping cart as a default value. Users will be able to change this to any Warehouse which is not restricted on the 'Excluded Warehouses' area of the setup screen.

The optional features include the ability to show whether Available Quantities are available for the Users to view and whether or not to allow multiple units of measure to be used for the items being ordered.

The Excluded Warehouses area allows you to restrict down the Warehouses which a Portal user can see, such as internal transfer warehouses or just to exclude normal Retail stores.

Warehouse ID	Description	Exclude from Warehouses List
GIT	Goods in Transit	☑
OUTSOURCE	Outsourced warehouse	☑
RC0601	IN06 sklad 1	☑
RC0602	IN06 sklad 2	☑
RC0603	IN06 sklad 3	☑
RESALE	Wholesale purchase warn but allow on fly	☑
RETAIL	Retail warehouse	☑
RETAIL2	Retail section 2	☑
WHEAST	Eastern	☑
WHNORTH	Northern	☑
WHOLESALE	Wholesale warehouse	☐
WHOLPUR...	Wholesale purchase warn but allow on fly	☐
WHOLPUR...	Do not allow on the fly	☐

Figure: Enabling which Warehouses will be included on the Customer Portal

Sales Orders – Process

Customer Portal users are able to process their own Sales Orders by first going into the Item Catalogue. The Catalogue will show a list of items that have been selected as part of the Item Sales Categories screen (IN.20.40.60) inside the ERP suite.

On the Catalogue list, Portal users will be able to add any number of items to their cart by ticking the box ‘Add to Cart’ and then the ‘Add To Cart’ button. Once the button has been selected, they will be able to see their total quantity and cost at the top of the screen.

Depending on the user visibility, they might be able to see the discounts given, the available quantities at the Warehouses and even be able to select a different Warehouse for items to be sourced from.

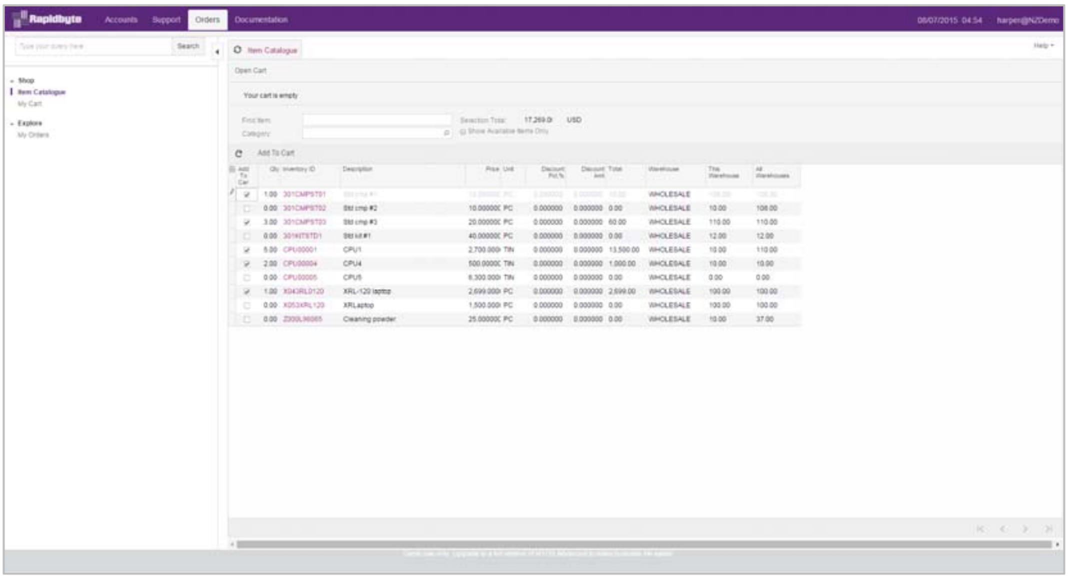


Figure: Sales Catalogue screen on the Portal

Once the Portal user is happy with the contents of their cart, they are able to click on the ‘Open Cart’ button at the top of the screen, or click on My Cart on the left-hand menu.

When a Portal user is on the My Cart page, they are able to review their current basket of items. In order to continue with the order, the Portal user can select ‘Proceed to Checkout’.

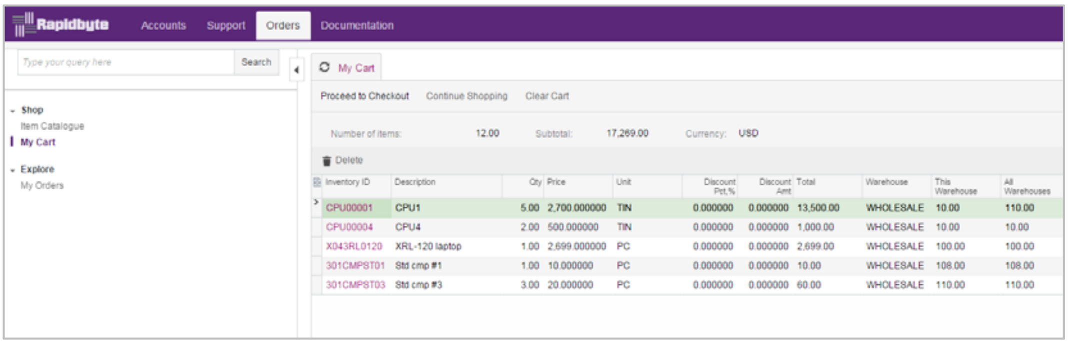


Figure: My Cart screen on the Portal

On the Checkout screen, the Portal user will confirm their Location and address details before selecting to continue. One final confirmation screen will come up and they can then submit their order which will show up on the screen as a printable document.

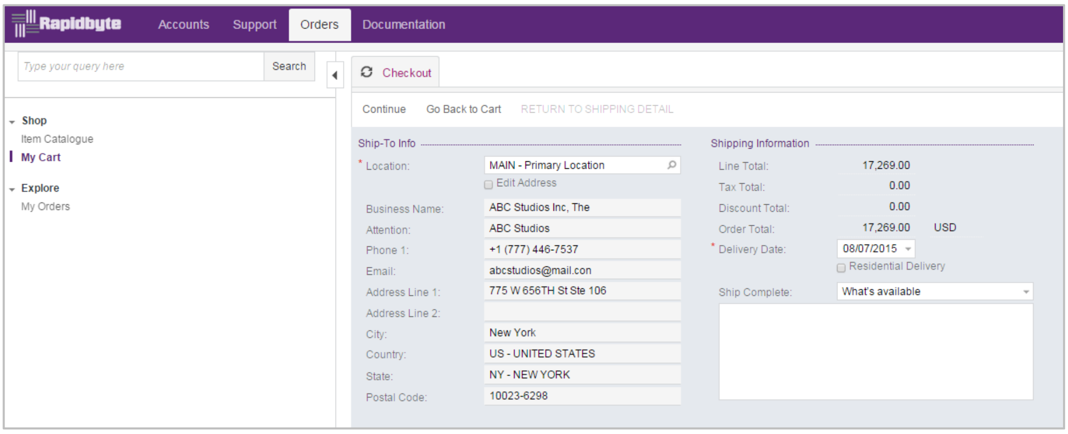


Figure: Checkout screen on the Portal

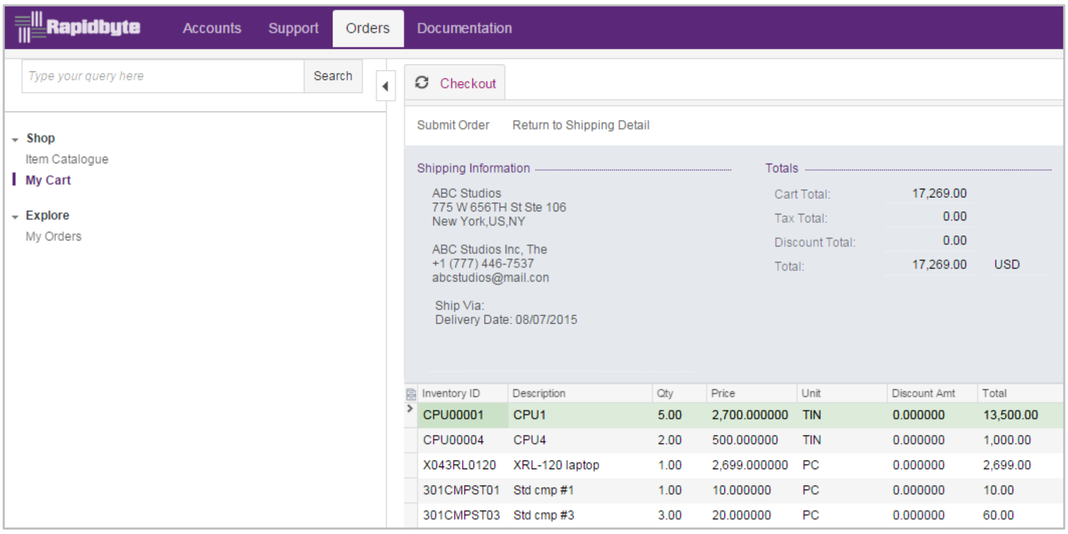


Figure: Checkout confirmation screen on the Portal

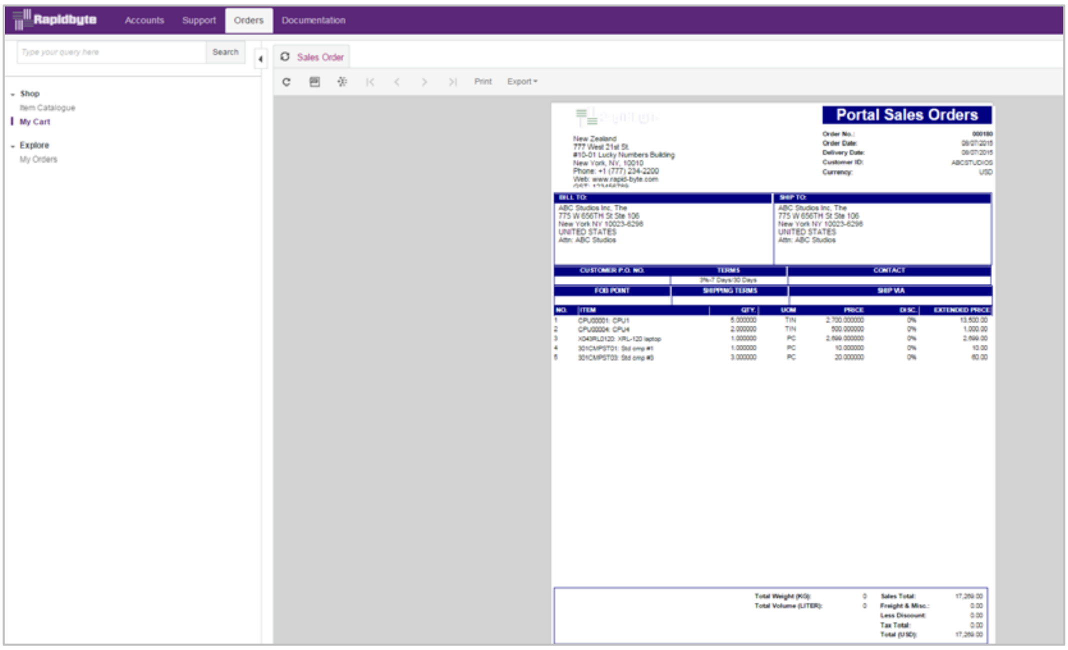


Figure: Sales Order Document screen on the Portal

Dashboards

As of the 2015.3.0 release, it is possible to create Dashboards for the Customer Portal. Dashboards may only be created by ERP users but all Portal users will be able to view the Dashboards with their own company data as long as they have sufficient rights.

Dashboards will work just as they do inside the ERP system and are a way of viewing a pool of data in the following formats:

- Chart
- Table
- Wiki

Dashboards can be added by going to a screen where Dashboards are available as a drop-down selection. This will be alongside the Help menu:

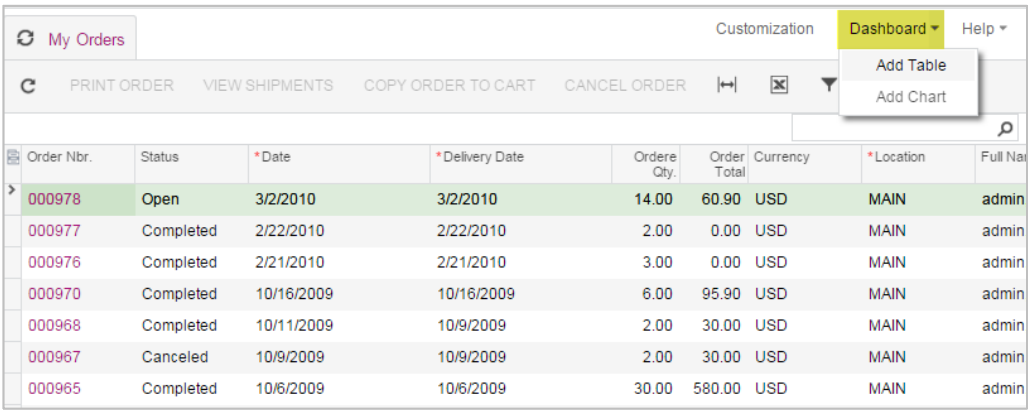


Figure: Dashboard selection options

Wiki Dashboards are added in a similar way, you will need to navigate to the Wiki article you want to add as a Dashboard and then select the Dashboard option at the top right. You will be given fewer options to select as most of this process is taken care of behind the scenes.

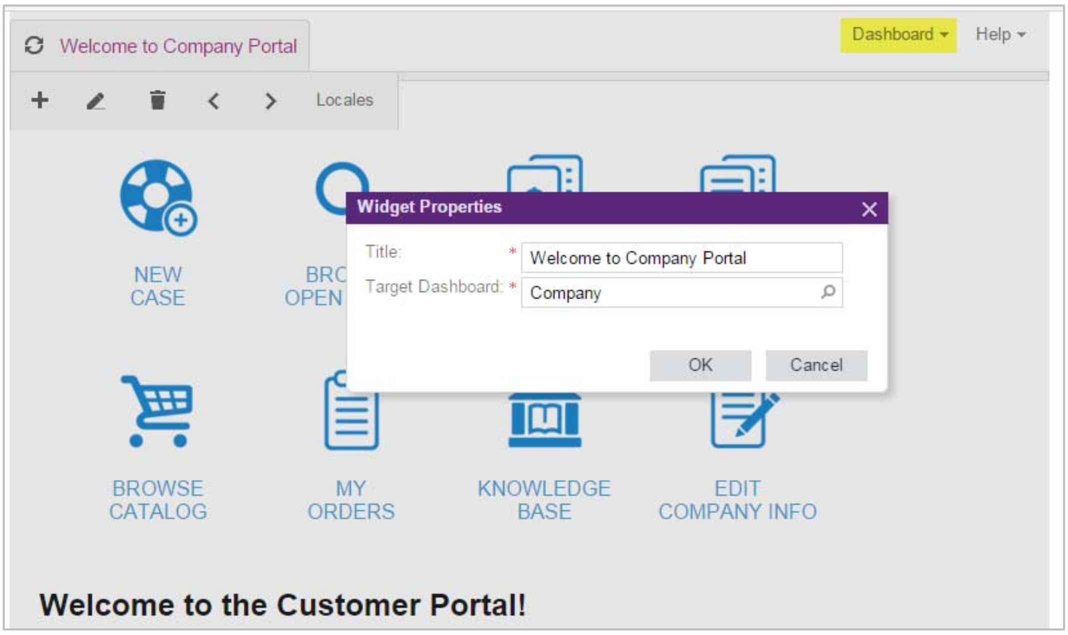


Figure: Adding in a Wiki Dashboard

At this stage, the Company page (00.00.00.00) is the only location where Dashboards can be stored. It is possible to have several different combinations of Dashboards to give your Customer Portal users a true overview of information when logging in as the following Dashboard types are available:

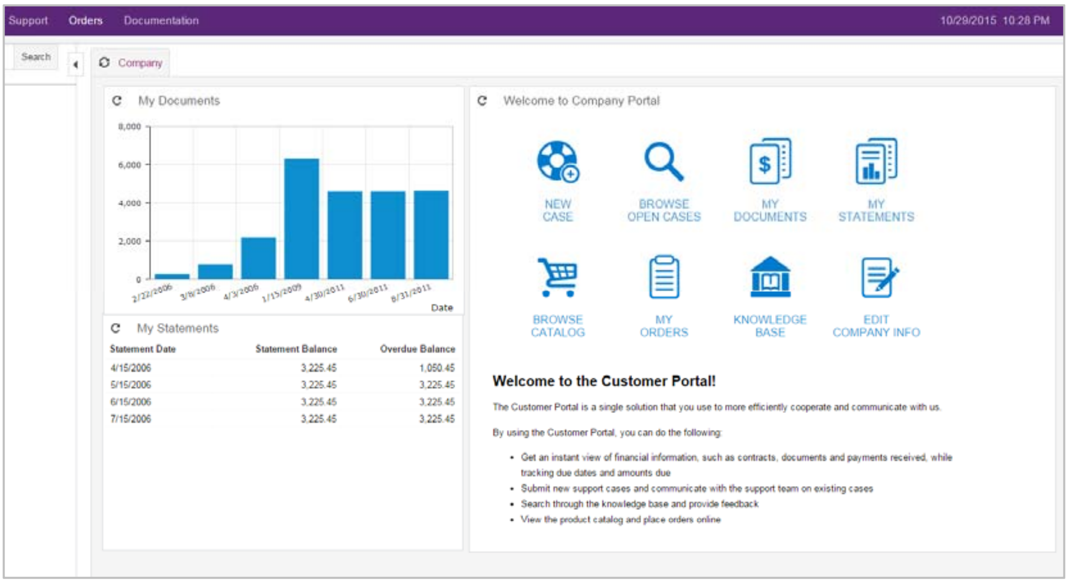


Figure: Collection of Dashboards on the Company screen

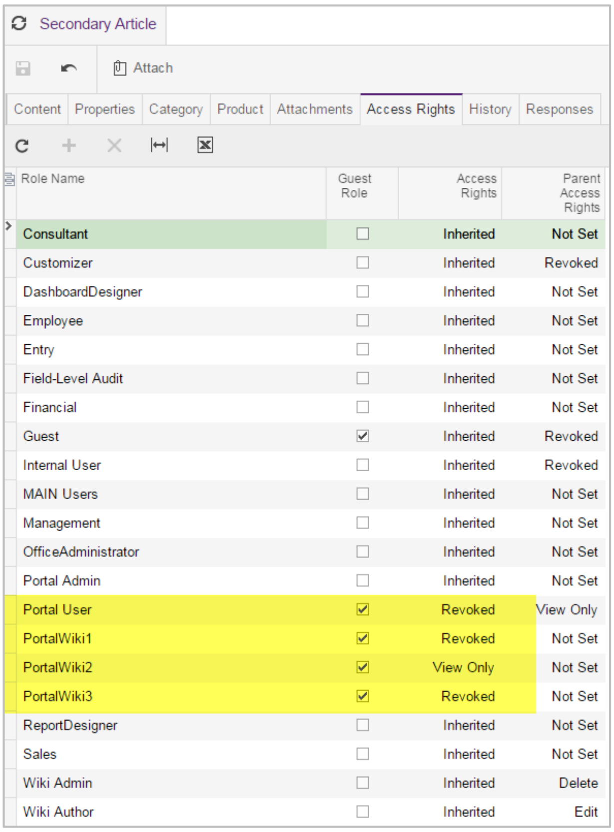
Hierarchal Dashboards

With the current Dashboard setup, it is possible to set up a series of rules based on Wiki Access by Role to provide a different starting Dashboard for different roles that an employee may have at a company. This allows for a number of combinations to come through.

In the below example, three different roles have been created:

- Wiki Portal 1
- Wiki Portal 2
- Wiki Portal 3

Each of these roles has been assigned to a Wiki article and each role has also been assigned to one individual within the same company. The following format has been used to set up these access rights on a Wiki Article:



Role Name	Guest Role	Access Rights	Parent Access Rights
Consultant	☐	Inherited	Not Set
Customizer	☐	Inherited	Revoked
DashboardDesigner	☐	Inherited	Not Set
Employee	☐	Inherited	Not Set
Entry	☐	Inherited	Not Set
Field-Level Audit	☐	Inherited	Not Set
Financial	☐	Inherited	Not Set
Guest	☑	Inherited	Revoked
Internal User	☐	Inherited	Revoked
MAIN Users	☐	Inherited	Not Set
Management	☐	Inherited	Not Set
OfficeAdministrator	☐	Inherited	Not Set
Portal Admin	☐	Inherited	Not Set
Portal User	☑	Revoked	View Only
PortalWiki1	☑	Revoked	Not Set
PortalWiki2	☑	View Only	Not Set
PortalWiki3	☑	Revoked	Not Set
ReportDesigner	☐	Inherited	Not Set
Sales	☐	Inherited	Not Set
Wiki Admin	☐	Inherited	Delete
Wiki Author	☐	Inherited	Edit

Figure: Wiki Access rights set up for Wiki articles only available on the Customer Portal

Once this logic has been applied to more than one article, it is possible to get different results with the different Employees logging into the Customer Portal:

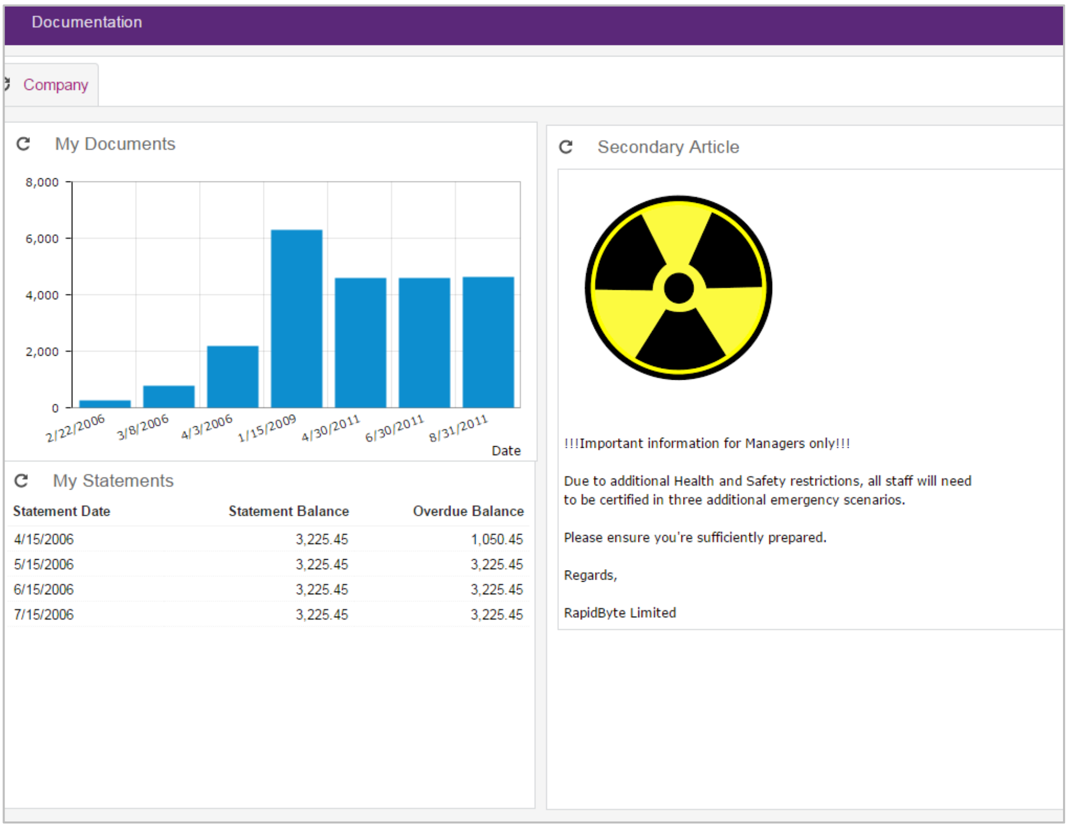


Figure: Login screen for Employee A showing one possible combination of a home screen

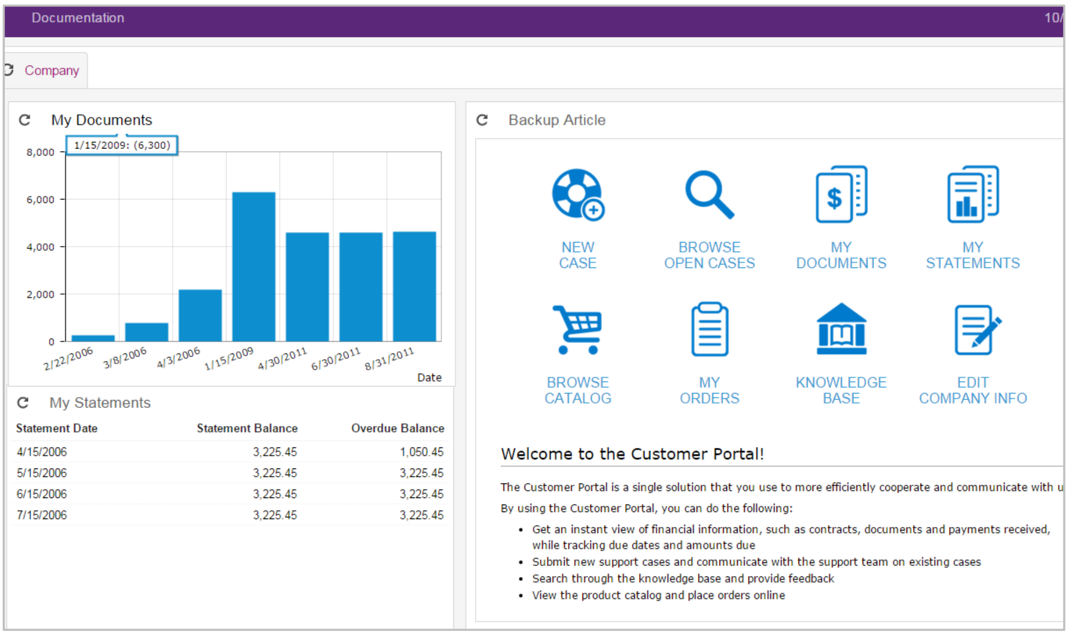


Figure: Login screen for Employee B showing another combination of a home page

With the logic applied, it is possible to have announcements to individual members of a company or targeted to logins belonging to specific roles e.g. Sales employees.

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