MYOB Advanced Business Quick Guide Customer Portal

Cloud Solutions for Bigger Business



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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.

MYOB Advanced Configuration Wizard			-	
Database Configu	ration			
You can either select an existing	database from the li	st or create a new one		
Create a new database	lew database's name:	MYOBAdvDB		
Connect to an existing database				
Available databases on server:	Reload the List M	YOB Advanced database	2015-3-1 (version	
2015-2-5-20-2 2015-2dev 2015-2release 2015-3	Î Th	e database has current v	version.	
2015-3-1 2015-3EAP 2015-3EAP2 2015-3-EAP3		 Repair database Shrink data after repair 		
Version: 2015.3.1.878 http://myob.com.au/enterprise		Step 2 of 8	< Back	Next >

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.



MYOB Advanced Configuration V	Vizard	- ×
Instance Confi	guration	
Before you can use MYOB appropriate information.	Advanced, the Web site has to b	be created and configured. Enter all
Instance Name:	2015-3-1portal	Create Portal
Local Path of the Instance:	\Installs\MYOB.Advanced-2015.3.1.878	78\2015-3-11
Select an account to access Default (anonymous us	ASP.NET application: ser).*	
Specify Login: Password:	Select	ect in *- User that IS uses by default.
Version: 2015.3.1.878 http://myob.com.au/enterprise		Step 6 of 8 < Back 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:

C Portal Prefer	ences		
· ·			
General Settings	B2B Ordering Settings		
* Portal Site Bran	ch:	MAIN	Q
Home Page:			Q
CRM Setting			
Default Case Cl	ass:	PORTAL - Portal class	Q
Priority:		Medium	Ŧ
Case Activity No	otification Template:		Q
Default Contact	Class:	DEFAULT	Q
Email Preference	s		
Portal External /	Access Link:		
Portal Primary C	Colour (hex):		

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 <i>guest account</i> 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.

C Portal Pre	ferences		
General Setting	gs B2B Ordering Settings	5	
General Settin	ıg		Default Image Setting
* Sales Order	Type:	SO	ImageUrl:
Default Stoc	k Item Warehouse:	RETAIL - Retail warehouse 🔎	
Default Non-	Stock Item Warehouse:	RETAIL - Retail warehouse 🖉	
		Show Available Quantities	
		Allow Only Sales Unit for Purchase	
Warehouse ID	Description		Exclude from Warehouses List
GIT	Goods in Transit		
OUTSOURCE	E Outsourced warehouse	9	
RC0601	IN06 sklad 1		\checkmark
RC0602	IN06 sklad 2		$\overline{\mathbf{Z}}$
RC0603	IN06 sklad 3		$\mathbf{\nabla}$
RESALE	Wholesale purchase w	arn but allow on fly	
RETAIL	Retail warehouse		
RETAIL2	Retail section 2		$\mathbf{\overline{N}}$
WHEAST	Eastern		×
WHNORTH	Northern		$\overline{\mathbf{v}}$
WHOLESALE	Wholesale warehouse		$\mathbf{\overline{v}}$
WHOLPUR	Wholesale purchase w	arn but allow on fly	

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 v	varehouses 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.

C Ne	w Zealand 👻 🕻	Contacts	Filter Ap	plied ×							
4	Save & Close		+	D - 1	i I< <	>	>I Ad	tions 🕶			
Cont	act ID:	<new></new>	•		Q	Work	group:				P
Туре		Contac				Owne	er:				Q
		Active Duplicate: Not Validated									
Details	Additional Info	Attributes	Activities	Relations	Opportunities	Cases	Campaigns	Marketing Lists	Notifications	User Info	1
Status		Active				Dis	able User				
User T	ype:	Unrestric	ted Extern	al User	P						
Login:		bob@lob	law.con								
Passw	ord:										
		Genera	te Passwo	rd							
G	↔ X										
Rol	e Name		Role Desi	cription							
🗆 An	onymous		Anonym	ous							
🗌 Gu	est		External	Guest Role							
D De	rtal Llear		Portal us	or							

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.

Rapidbyte Accou	nts Support	s Documentation	
Type your query here	Search	C My Statements	
Finance My Statements My Invoices		C Print Statement From Date: 08/01/2015	× •
✓ Contracts My Contracts		To Date: 08/07/2015 Statement Balance	▼ Overdue Balance
		15/05/2015 24,014.77 15/06/2015 24,014.77	24,014.77 24,014.77

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).

Repidbyte	Accounts	Beport	04	lers Docum	entation (06/07/2015 04:47 ha	un ORașel	Dyte -
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								14/04/0008		CHARGE	100014			.007.00	100.4			

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.

Accounts Support	Orde	115	Documentation								05/07/2015 04:48	harper@Rapid
Toxy one party here . Search		0 14	Invoices									Plat
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	2	8.0	Cash Sale Invoice	001012	24/06/2015	24/07/2015	Closed	1,000.00	0.00			
			Cash Sale	001012	24/06/2015		Closed	-870.00	0.00			
		8.0	Payment	000474	21/05/2012		Closed	-1.032.00	0.00	CM1-3-8		
		16 2	Invoice	000752	12/09/2012	12/10/2012	Closed	100.00	0.00	CM1-3-2		
		.0.0	1 Invoice	000751	17/06/2012	16/09/2012	Closed	832.00	0.00	CM1-2-21		
		10.1	hoce .	000750	14/06/2012	13/09/2012	Closed	100.00	0.00	CM124		
		9.1	1 Invoice	000624	31/08/2011	30/09/2011	Open	4.629.52	4.629.52	Project billing		
		8.5	Invoice	900759	30/06/2011	30/07/2011	Open	1,445.40	1.445.40	Other billing		
		0.1	invoce .	000760	30/06/2011	30/07/2011	Open	3,134.50	3.134.50	HR billing		
		0.1	3 Invoice	000757	30/04/2011	30/05/2011	Open	1,445.40	1,445.40	Other billing		
		8.5	Iniple	000758	30/04/2011	30/05/2011	Open	3,134.60	3.134.50	KR billing		
		0.5	Invoice	000696	01/02/2009	03/03/2009	Open	100.00	100.00			
		8.1	Credit Memo	000554	15/01/2009		Open	-1.000.00	-1.000.00	Customer Refund for Server		
		9.5	Invoice	000663	15/01/2009	14/02/2009	Open	3,800.00	3,000.00	Server with Internet		
		8.5	Impice	000566	15/01/2009	14/02/2009	Open	3.500.00	3.500.00	Server with Internet		
		0.0	invoice .	000702	01/07/2008	31/07/2008	Open	100.00	100.00			
		8.1	3 Invoice	000701	01/06/2008	01/07/2008	Open	100.00	100.00			
		1410	Invice	000700	01/05/2008	31/05/2008	Open	100.00	100.00			
		8.5	invoce .	000639	01/04/2008	01/05/2008	Open	100.00	100.00			
		0.0	Invoice	000656	01/03/2008	31/03/2008	Open	100.00	100.00			
		8.1	invoce .	000697	01/02/2008	02/03/2008	Open	100.00	100.00			
		0.1	Payment	000044	10/04/2006		Closed	-2.500.00	0.00	Web design		
		9.1	Invoice	000106	03/04/2006	10/04/2006	Closed	4,675.00	0.00	Web design		

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.

Rapidbyte Accounts	Support	Orders Documentation
Type your query here	Search	C New Case
 ✓ Support New Case 		Submit Priority: Medium
Open Cases Closed Cases		* Class ID: Default Portal Class * Subject: New Case to be created
Company Profile Contacts		Details Attributes Visual ▼ ☎ ☎ Paragraph ▼ B Z 및 ▼ ▲ ▼ ∠ ▼ ≣ ▼ 提 提 定 促 @
Customer Management Customer Accounts Customer Contacts		I would like to enquire as to what changes can be made to our Customer Contract Thanks, Travis

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'.

Rapidbyta Accounts Support	Oid	era	1	Jocu	ment	ition								05/07/20	15 04:49 N	aiper@RapidByh
Trife poor party here	•	0	Op	en Ca	ates											Help -
- Support		c		•	н	8	*									Q
New Care Open Cases		1	-	ed fby		Harper 1	Tavis. Mr. 🛛 🕺 Ma									
Clisted Cases				Cas	e O	*hite	et .	356.6	Reason.	Severity	Presty	*Class ©	Assigned To	Last Activity Date	Contact	Customer ID
- My Account		18		000	er0x	New L	are to be created	New	Unassigned	Medure	Low	DEFAULT			Harper Travi	ABCSTUDIOS
Company Profile		. *		000	90.08	Secure	ty software installed on server environment	New	Urassigned	Medium	Medum	DEFAULT			Harper Travi	ABCSTUDIOS
Contacte		1.2		000	3017	Should	I have received 30%-Off	Open	In Process	Low	Medium	DEFAULT			Harper Travi	ABCSTUDIOS
Cestimer Management Castimer Accesses Continuer Accesses Continuer Contacts				000	2016	Bookle	A Advettoement Affane	Open	In Excatation	Medure	Medium	DEFAULT			Haper Train	ABCSTUDIOS

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.

Rapidbyte Accounts Su	pport Ord	ers Documentation					
Type your query here Se	earch	O Company Profile					
Support		· ·					
New Case		Main Contact		Main Address			
Closed Cases		Company Name:	ABC Studios Inc, The	Address Line 1:	775 W 656TH	St Ste 106	
		Attention:	ABC Studios	Address Line 2:			
My Account		Email:	abcstudios@mail.con	City:	New York		
Contacts		Web:		* Country:	US - UNITED STATES		ρ
Consta		Phone 1:	+1 (777) 446-7537	State:	NY - NEW YO	ORK	¢.
Customer Management		Phone 2:		Postal Code:	10023-6298	View on Map	
Customer Accounts		Fax:	+1 (777) 446-7524				

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.

	Orders Documentation			
Type your query here Search	Contacts			
* Support	C 🖍 ADD NEW 🛏 🗵 🕇			
New Case	Display Name Position Email	Phone 1 Usern	name User Type	Active
Open Cases	Simpson Mill, Mr. Manager	+1 (777) 892-3466 simp	son Unrestricted External	
Closed Cases	Harper Travis, Mr. Officer	+1 (777) 228-0220 harpe	er Unrestricted External	2
Mr. Assessed	Neverov Aleks, Mr. Specialist	+1 (777) 446-7534		2
Company Profile	Smith John, Mr.			2
Contacts	taylor Joh, Mr.			2
Customer Management Customer Accounts Customer Contacts				

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.

Rapidbyta Accounts Support	Orders Documentation Configu	ration :		06/07/2015 12:51 Andrews@RapidByte
Administrator Knowledge Base Management				
Type plur pary feet Seath	O Portal Preferences			□ Notes Files (1) Customisation High +
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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.



2	Warehouse ID	Description	Exclude from Warehouses List
>	GIT	Goods in Transit	
	OUTSOURCE	Outsourced warehouse	\checkmark
	RC0601	IN06 sklad 1	\checkmark
	RC0602	IN06 sklad 2	\checkmark
	RC0603	IN06 sklad 3	\checkmark
	RESALE	Wholesale purchase warn but allow on fly	\checkmark
	RETAIL	Retail warehouse	\checkmark
	RETAIL2	Retail section 2	\checkmark
	WHEAST	Eastern	\checkmark
	WHNORTH	Northern	\checkmark
	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.

Repidbyte	Support Orders	Docume	intation											harpengh20eme
Type your starty (see	Seath	O Item	Catalogue											Nety +
- Shop		Open Ca	5.											
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		+	_	-					1.1.1		-			

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'.



Rapidbyte Accounts Support Orders	6	Documentatio	n									
Type your query here Search	(O My Cart										
- \$000		Proceed to Cher	kout Continue Shopping	g Clea	ir Cart							
hem Catalogue My Cart		Number of ite	ms: 12.00	s	ubtotal:	17,269.00	Currency:	USD				
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		301CMPST01	Std cmp #1	1.00	10.000000	PC	0.000000	0.000000	10.00	WHOLESALE	108.00	108.00
		301CMPST03	Std cmp #3	3.00	20.000000	PC	0.000000	0.000000	60.00	WHOLESALE	110.00	110.00

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.

Documentation				
C Checkout				
Continue Go Back to	o Cart RETURN TO SHIPPING DETA			
Ship-To Info		Shipping Information		
* Location:	MAIN - Primary Location	P Line Total:	17,269.00	
	Edit Address	Tax Total:	0.00	
Business Name:	ABC Studios Inc, The	Discount Total:	0.00	
Attention:	ABC Studios	Order Total:	17,269.00	USD
Phone 1:	+1 (777) 446-7537	* Delivery Date:	08/07/2015 -	
Email:	abcstudios@mail.con		📄 Residential Delive	ery
Address Line 1:	775 W 656TH St Ste 106	Ship Complete:	What's available	*
Address Line 2:				
City:	New York			
Country:	US - UNITED STATES			
State:	NY - NEW YORK			
Postal Code:	10023-6298			
	Documentation Continue Go Back t Ship-To Info * Location: Business Name: Attention: Phone 1: Email: Address Line 2: City: Country: State: Postal Code:	Mathematical Checkout Continue Go Back to Cart RETURN TO SHIPPING DETA Ship-To Info * Location: MAIN - Primary Location E dilt Address Business Name: ABC Studios Inc, The Attenton: ABC Studios Phone 1: + 11 (777) 446-7537 Email: Abstsudios@mail.con Address Line 2: City: New York Country: US - UNITED STATES State: NY - NEW YORK Postal Code:	Occumentation Continue Go Back to Cart RETURN TO SHIPPING DETAIL Ship-To Info Shipping Information Line Total: * Location: MAIN - Primary Location P Edit Address P Line Total: Business Name: ABC Studios inc, The Discount Total: Attention: +1 (777) 446-7537 Discount Total: Phone 1: +1 (777) 446-7537 Delivery Date: Email: abcstudios@mail.con Ship Complete: Address Line 1: 775 W 656TH SI Sie 106 Ship Complete: City: New York Ship Complete: State: NY - NEW YORK Postal Code: 10023-6298	Occumentation Continue Go Back to Cart RETURN TO SHIPPING DETAIL Ship-To Info * Location: MAIN - Primary Location Business Name: ABC Studios inc, The Attention: - Edit Address Phone 1: + 1 (777) 446-7537 Email: abcstudios@mail.con Address Line 1: 775 W 656TH SI Sie 106 Address Line 2: NY - NEW York Country: US - UNITED STATES State: NY - NEW YORK Postal Code: 10023-6298

Figure: Checkout screen on the Portal

		Documentatio						
Type your query here Search Shop Item Catalogue My Cart Explore My Orders		Checkout Submit Order Shipping Informa ABC Studios 775 W 656TH New York,US,	Return to Shipping Detai ttion	I	Totals Car Tax Disc	s t Total: Total: count Total:	17,269.00 0.00 0.00	
		ABC Studios I +1 (777) 446- abcstudios@r Ship Via: Delivery Date	nc, The 7537 nail.con : 08/07/2015		Tota	al:	17,269.00	USD
		Inventory ID	Description	Qty	Price	Unit	Discount Amt	Total
	-	CPU00001	CPU1	5.00	2,700.000000	TIN	0.000000	13,500.00
		X043RL0120	XRL-120 lanton	2.00	2 699 000000	PC	0.000000	2,699,00
		301CMPST01	Std cmp #1	1.00	10.000000	PC	0.000000	10.00
		301CMPST03	Std cmp #3	3.00	20.000000	PC	0.000000	60.00

Figure: Checkout confirmation screen on the Portal



Rapidbyte Accounts Support Orders	Documentation	
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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:

_											
	O My Orders						Cust	omization		Dashboard 🕶	Help 🔻
	• • • • • • •				0.1110		L. J.	24	_	Add Table	
	C PRINTO	RDER VIEW	SHIPMENIS	COPY ORDER TO CART	CANC	EL ORDER	++	x	т	Add Chart	
											م
	Order Nbr.	Status	*Date	*Delivery Date		Ordere Qty.	Order Total	Currency		*Location	Full Na
>	000978	Open	3/2/2010	3/2/2010		14.00	60.90	USD		MAIN	admin
	000977	Completed	2/22/2010	2/22/2010		2.00	0.00	USD		MAIN	admin
	000976	Completed	2/21/2010	2/21/2010		3.00	0.00	USD		MAIN	admin
	000970	Completed	10/16/2009	10/16/2009		6.00	95.90	USD		MAIN	admin
	000968	Completed	10/11/2009	10/9/2009		2.00	30.00	USD		MAIN	admin
	000967	Canceled	10/9/2009	10/9/2009		2.00	30.00	USD		MAIN	admin
	000965	Completed	10/6/2009	10/6/2009		30.00	580.00	USD		MAIN	admin

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:

Ę	C Secondary Article										
1		^	ΰA	ttach							
(Content	Pro	perties	Category	Product	Attachm	ents	Acce	ss Rights	History	Responses
	с.	÷	×	↔ ≥	ζ						
2	Role Na	ime					Gue Rol	est le	A	Access Rights	Parent Access Rights
>	Consul	tant					[Inh	erited	Not Set
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	Dashbo	bardD	esigner				[Inh	erited	Not Set
	Employ	ee					[Inh	erited	Not Set
	Entry						[Inh	erited	Not Set
	Field-Le	evel A	Audit				[Inh	erited	Not Set
	Financi	al					[Inh	erited	Not Set
	Guest						[~	Inh	erited	Revoked
	Interna	Use	r				[Inh	erited	Revoked
	MAIN	Jsers					[Inh	erited	Not Set
	Manag	emen	t				[Inh	erited	Not Set
	OfficeA	dmin	istrator				[Inh	erited	Not Set
	Portal /	Admir	ı				[Inh	erited	Not Set
	Portal (Jser					[~	Re	voked	View Only
	PortalV	Viki1					E	~	Re	voked	Not Set
	PortalV	Viki2					E	~	View	Only	Not Set
	PortalV	Viki3					E	~	Re	voked	Not Set
	Report	Desig	ner				[Inh	erited	Not Set
	Sales						[Inh	erited	Not Set
	Wiki A	dmin					[Inh	erited	Delete
	Wiki A	uthor					[Inh	erited	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.



