MYOB Advanced Business Setting up the Customer Portal

Cloud Solutions for Bigger Business



Contents

Overview	1
Provisioning the Customer Portal	2
Configuring the Customer Portal	3
Customising the Welcome Page	6
Maintaining the Item Catalogue	7
Setting up Customers with Access to the Customer Portal	9
Adding Wiki Pages to the Customer Portal	11
Adding Additional Companies to the Customer Portal	12

Overview

The MYOB Advanced Customer Portal provides a simple interactive B2B communication and ecommerce service that allows MYOB Advanced Business clients to work and communicate with their end-customers more efficiently.

Using Customer Portal, your customers can access their account information, create and track online orders and create and manage support cases—all without picking up the phone or sending an email. All of these services are available 24 hours a day, 7 days a week.

End-customers given access to the portal can complete the following actions:

Financial Management

- View and update address and contact information
- View and download invoice and payment history
- View and download statements

B2B Ordering

- View a catalogue of inventory items, including stock on hand and pricing
- Place sales orders directly through the customer portal
- View and download sales orders

Case Management

- Create and monitor service cases and service contract balances
- Publish a knowledge base of articles to improve support interactions

Document Sharing

The Customer Portal provides a secure location to share important content with customers, such as marketing and informational documents, as well as corporate policies—all without the need to build a separate webpage.

Provisioning the Customer Portal

MYOB Advanced business partners can request a portal to be provisioned for their clients by logging a service request with MYOB with the following details:

Detail	Value
Summary	"Advanced Business Customer Portal required"
Description	Provide the client's existing service URL
SR Type	Feature Request
Product	Customer Portal
Area	Regular Business
Sub-area	Portal

Once received, MYOB will provision the customer portal and notify the partner once this available for configuration and use.

Note: The URL of the customer portal will be *https://clientsite-portal.myobadvanced.com*

Configuring the Customer Portal

Basic configuration of the customer portal is completed by carrying out the below steps in both the ERP site (ERP) and the portal site (Portal).

Note: Full configuration documentation for the Customer Portal is available in the user guide of MYOB Advanced.

1. Login in to the main ERP site and navigate to the Enable / Disable Features page (CS10.00.00) and choose which features you want active in the customer portal.

Customer Portal

B2B Ordering

- Case Management on Portal
- Financials on Portal
- 2. Determine which ERP users will have administrative access to the customer portal.

Note: Users with portal admin access can access the configuration settings of the customer portal and created / edit / delete the wiki articles displayed.

Navigate to the users page (SM.20.10.10) and ensure the relevant users have either the "Portal Admin" or "Administrator" user role assigned.

= =Rapidbyte	Organisation	Fina		Distri	bution	С	onfigu	ration	Sys	tem He	lp			
Common Settings	ser Security	Row-Lev	/el Seci	urity	Docum	ent I	Manage	ement	Ema	il				
User Security		•	Ø N	ew Yo	k ≁ Us	ers	*							
Type your query here	Search			ŗ	+ 1		к	<	>	> Log	in As User 🛛 N	lembers	hip	Reset Password
- Manage			* Use	mame:				vs - And		ichael		Q		Status:
Users							Gues	st Accou	nt					License Status:
User Roles			Use	r Type:								Q	R	
User Types			Link	ed Entit	V:		Micha	el Andrev	vs, Mr.			Q	£.	
Access Rights By Screen				t Name:			Michae	el						
Access Rights By Role				Name:			Andrey							
Partner Support												5-1		
			* Ema					ews@R		e.com				
- Explore			Con	nment:			Michae	el Andrev	VS					
Access History												11		
- Process			Roles	Licens	e Types	Sta	tistics	IP filter	Extern	al Identities	Personal Settin	igs		
Certificate Replacement			С	↔	x									
+ Print		8	Seleo	cted	Role Nan	ne			Ro	le Descriptior	1			
Licence Usage					Entry				En	try Clerk				
User List					Field-Lev	vel A	udit		Ro	le that can a	ccess Field-Leve	el Audit		
Role List					Financia	l.			Fir	ancial Cont	oller			
Access Rights By Screen					Guest				Ex	ternal Guest	Role			
Access Rights By Role				~	Internal	User			All	ows the use	r to change perso	nal sett	ings a	
- Configure				-	MAIN U					AIN Users	shange peroe	ar oott		
Security Preferences														
Encryption Certificates					Manager					neral Manag				
					OfficeAc					fice Adminis				_
				~	Portal A	dmin			Ac	cess to port	al configuration			
					Portal U	ser			Po	rtal user				-

3. Log in to the customer portal as a portal administrator to complete initial configuration of the portal.

- 4. Navigate to the Portal Preferences form (SP.80.00.00) in the Configuration menu.
 - i. Select the branch of the ERP site that portal users will have access to.
 - ii. Enter the hex code of the colour to be used as primary colour of the customer portal.

Rapidbyte Account	s Support	Ord	ders Documentation	Configura	tion		
Administrator Knowledge Base	Management						
rpe your query here	Search	•	C Portal Preferences				
and Side Management			i n				
ortal Site Management ortal Preferences			General Settings B2B Orde	ring Settings			
ctivate License			Ŭ				
equest Profiler			* Portal Site Branch:		MAIN	Q	
utomation Notifications			Home Page:		Demo Company	Q	
ustomisation			CRM Setting				
ortal Map			Default Case Class:			Q	
ustomization Projects			Priority:		Medium	*	
eerer maanen rejeere			Case Activity Notification	Template:		Q	
ccess Management			Default Contact Class:	remplate.	DEFAULT	p	
ccess Rights by Screen			Email Preferences		DEFAGET		
ccess Rights by Role			Portal External Access Lin		https://demo-portal.myo	had increased a small	
lentity Provider Preferences					https://demo-portai.myd	bauvanced.com/	
			Portal Primary Colour (hex):			

Note: You can also see the URL of the portal here and in SM.20.05.05 of the ERP site for future reference. This URL is used in automated emails to customers such as welcome emails and password recovery emails.

- 5. If you have enabled the B2B Ordering feature, an additional tab is available to configure the default ordering behaviours of the portal.
 - i. Sales order type: You can select the type of the sales order to be generated when the customer makes an order.
 - ii. Warehouses: You can select which warehouses will be available for the portal users, what warehouse is used for ordering stock items by default, and what warehouse is used for ordering non-stock items by default. When they are making an order, your customers will be able to leave the default warehouse or select a warehouse from the list of available warehouses.
 - iii. Whether the quantity of items in stock should be visible for your customers.
 - iv. If you want to place orders only in the UOM specified for sales, select the Allow Only Sales Unit for Purchases check box.
 - v. You have the ability to add the image that will appear if a particular item in the catalogue doesn't have an image.

Administrator Knowledge Bas	se Management								
Type your query here	Search	4	O Portal Prefe	erences					
Portal Site Management			8 ·						
Portal Preferences			General Settings	B2B Ordering Settings					
Activate License Request Profiler			General Setting			Default Image	Setting		
Automation Notifications			* Sales Order Ty	/per	SA P	Select an Im	age to Upload	BROWSE	UPLOAD
Customisation			Default Stock	Item Warehouse.	WHOLESALE - Wholesale warehr P			procession and a second	
Portal Map Customization Projects			Default Non-S	tock Item Warehouse:	WHOLESALE - Wholesale warehc P Show Available Quantities		NO IM	AGE	
Access Management					Allow Only Sales Unit for Purchase		15	.(0	
Access Rights by Screen Access Rights by Role							AVAIL	ABLE	
Identity Provider Preferences									
			Warehouse	Description		Exclude from Warehouses List			
			GIT	Goods in Transit		8			
			OUTSOURCE	Outsourced warehouse		2			
			RC0601	IN06 sklad 1		2			
			RC0602	IN06 sklad 2		2			
						110			

Customising the Welcome Page

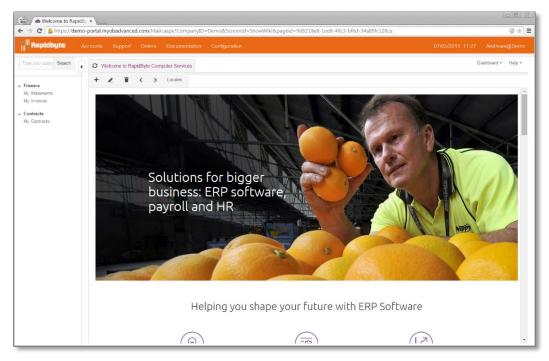
The welcome page is a pre-defined wiki article called web_site (SP_00_00_00). This article can be edited by portal administrators using the standard wiki edit controls.

Note: You can replace the welcome page with another wiki article of your choice by changing the portal home page in the portal preferences page (SP.80.00.00), but if the selected article becomes unavailable for any reason, the system will revert to the default wiki article

1. Use the pencil icon 🖉 to edit the contents of the wiki article.

🚔 🔺 Welcome to MYO8			
← → C 🛔 https://demo	-portal.myobadvanced.com/Main.aspx?CompanyID=Demo&ScreenId=ShowWiki&pageid=9d6219e8-1ee8-46c3-bf6d-34a8Sfc128ca		* =
Rapidbyte A	counts Support Ordens Documentation Configuration	07/05/2015 11:25	Andrews@Demo
Type your query Search 4	O Welcome to MYOB Advanced Self-Service Portal)	Dashboard • Help •
 Finance My Statements. My Invoices Contracts My Contracts 	Contract on the Contract of Service Portal is a single solution that you can use to more efficiently cooperate and communicable with your cutatomers. New solution is a single solution that you can use to more efficiently cooperate and communicable with your cutatomers. The solution is a single solution that you can use to more efficiently cooperate and communicable with your cutatomers. The solution is a single solution to the bioxem. The solution is a single solution to the bioxem. The solution is a single solution to the bioxem. The solution is a single solution is and particle and the solution is a single solution to the bioxem. The solution is and particle is a single solution is a single solutis a single solution is a single solution is a single solution is a		

2. Replace the content with your own personalised content in Wiki or HTML format and save.



Maintaining the Item Catalogue

You maintain the item catalogue that is available for purchase on the Customer Portal directly from the ERP site using the standard functionality of the inventory module. By assigning an item sales category to an inventory item, you both categorise the item and include the item in the online catalogue.

Managing the online catalogue includes completing the following tasks for each inventory item, which you perform by using within the ERP site:

1. Configuring inventory items before you present the items in the online catalogue, including adding extended descriptions for the items and uploading item images (IN.20.25.00)

Inventory Sales Orders Pure		Ince Distribution Configuration System Help
Inventory	hase Orders	O New York ~ Stock Items 🚖
Type your query here Sea	rch	E r + D · E K < > > Actions · Inquiries ·
L b b	٥	* Inventory ID: Product Workgroup: P Item Status: Active * Product Manager P Description: Samseong monitor 19"
Receipts Issues Kit Assembly Transfers Adjustments Physical Invectory Count Physical Invectory Review Manage Non-Stock Items		General Settings Price/Cost Info Warehouse Details Vendor Details Attributes Packaging Cross-Reference GL Accounts Restriction Groups Desc Attributes Required Value Value Seried an Image to Upload BROWSE UPLOAD
Stock Items Item Warehouse Details Kit Specifications Explore Inventory Summary Inventory Allocation Details Inventory Allocation Details		Sales Categories C + X Category ID Monitors
Inventory Sales Orders Purcha	ise Orders	
	4 0	O New York - Stock Items 👘
	- 1 H	O New York - Stock Items ∰ □ ∽ + □ ~ ■ K < > > Actions - Inquiries -
ype your query here Search		
Type your query here Searc Searc Searc Second Searc S) E 2 ·	Π m + D - If Actions ~ Inquiries ~ * Inventory ID: P000M\$\$8019-\$amseong monitor 19' P Product Workgroup: P
Type your query here Searc Searc Second Sec		Image: Second

2. Forming the multi-layered catalogue structure by adding, deleting, and organising sales categories (IN.20.40.60)

inven	sales	Orders	Purchase	Orders										
Invento	ry			•	O New York + Ite	m Sales Categories 🔺								
Type yo	ur query hele		Search		8 n									
			1000	- 1	Categories									
1	▶	Int	٥		+ + +		1 De	escription:	Monitor	8	Pare	t Category Demo Company P		
							Categ	ory Members						
Setup				1	🕫 💼 Demo Company		с	+ ×	¢	*	🖒 Add Items	 ⊷		
Manage					Monitors			Inventory ID		Descripti	on	Item Class	Item Status	
Wareho					- Desktops		° 🗆	P000MLG014		LG mon	itor 14"	PERIFERY	Active	
Item Classes Item Sales Categories			- Illi Servers - Illi Laptops				P000MLG019		LG mon	itor 19"	PERIFERY	Active		
item Sales Categories					- IE Networking			P000MSS019 Samseong monitor 19"			PERIFERY	Active		

3. Assigning sales categories to inventory items, thus adding the inventory items to the catalogue (IN.20.40.60) or (IN.20.25.00)

Setting up Customers with Access to the Customer Portal

Once the customer portal is configured and ready for use you can begin setting your customer contacts up with a user account for login.

Complete these steps to create a user account for a contact:

- 1. Open the contacts page (CR.30.20.00) and select the desired contact.
- 2. Navigate to the User Info tab to create a user account.
- 3. Select a user type, the default "Unrestricted External User" already exists.
- 4. Specify a login name, this will default to the contacts email address.
- 5. Allow the system to self-generate a password, or create a unique password.
- 6. Specify the level of access the user has in the portal.

Repidibute Organisation Finance Distribution Configuration System Help 07005/2015 11.51 Andrews@Demo Communication Customer Management Projects Time & Expenses Organisation Structure Dashboard Templates Company Dashboards Customer Management O New York + Contacts In Notes Files Notes <th>Contac</th> <th></th> <th>×</th> <th>obadvance</th> <th>ed con</th> <th>n//W/18211/Main.aspx?</th> <th>CompanyID=Demo&ScreenId=CR302000&ContactID=2877</th> <th></th> <th></th> <th>(Y) =</th>	Contac		×	obadvance	ed con	n//W/18211/Main.aspx?	CompanyID=Demo&ScreenId=CR302000&ContactID=2877			(Y) =
Customer Managemeit Image New York - Contacts Image Net Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search Image New Search						nce Distribution	Configuration System Help 🔤 07/05/2015 11:	51: ()		
Spe your query here Contact ID The second query here Spe your query here </th <th>Commu</th> <th>unication</th> <th>Customer I</th> <th>Managemer</th> <th>it i</th> <th>Projects Time & Exp</th> <th>enses Organisation Structure Dashboard Templates Company Dashboards</th> <th></th> <th></th> <th></th>	Commu	unication	Customer I	Managemer	it i	Projects Time & Exp	enses Organisation Structure Dashboard Templates Company Dashboards			
Contact ID: Contact I	Customer	r Managemer	nt		4	O New York + Cor	vlacts 🗋 Notes Files	Notifi	ations H	lelp -
Image: Contact: Contact	Type your	query here		Search		🗧 🛛 Save & Close	🗃 🏫 🕂 🖄 - 🗃 K K > >1 Actions -			
Ender Depletate Net Validate Ladá Detals Additional Info Attributes Activities Relations Opportunities Cases Canega (Sanega (Sane		×.	b	٥						1
Carles Mass Emails * User Type: * Obel: * User Type:							Reactive Duplicator Not Validated			
Marketing Campaign Members Rele Name Role Exemption Anonymous Anonymous Coust External Coust Role Potal User Potal user	Account L Marketing	Manage Contacts Business Accounts Account Locations				* Login Password	cbroan@somewhere.con			
Guest External Guest Role Portal User Portal user			nbers			R Role Name	Role Description			
Portal User										
								14	< >	21

7. On save an email is automatically queued for sending to the contact advising of their username, password and login URL.

Note: This email can be personalised by editing the "User Welcome Notification" notification template in page SM.20.40.03

8. A copy of the email sent is recorded as an activity against the contacts user record in SM.20.10.10.

Email Activity - Google Chrome			n x
$\textcircled{b} https://demo.myobadvanced.com/(W(10182))/pages/cr/cr306015.aspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f415057646945594557Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f4150576469455945257Daspx?timeStamp=210b82bb2fd4f8f415057646945594557Daspx?timeStamp=210b82bb2fd4f8f415057646945594557Daspx?timeStamp=210b82bb2fd4f8f4150576469455945597Daspx?timeStamp=210b82bb2fd4f8f4150576469455945557Daspx?timeStamp=210b82bb2fd4f8f41505764694559baspx?timeStamp=210b82bb2fd4f8f41505764694559baspx}timeStamp=210b82bb2fd4f8f4150576469455945454545454545557Daspx}timeStamp=210b82bb2fd4f8f4150576469456557Daspx}timeStamp=210b82bb2fd4f8f4150570aspx}timeStamp=210b82baspx}timeStamp=210b82baspx}timeStamp=210b82baspx}timeStamp=210b82bb2fd4f8f4150576469455557Daspx}timeStamp=210b82baspx}timeStamp=210b82baspx}timeStamp=210b82baspx}timeStamp=210b82baspx}timeStamp=210baspx}timeStamp=210baspx}timeStamp=200baspx}timeStamp=200baspx}timeStamp=200baspx}timeStamp=200baspx}timeStamp=200baspx}timeStamp=200baspx}timeStamp=200baspx}timeStamp=200baspx}timeStamp=200baspx}timeStamp=200baspx}timeStamp=200$	89605&PopupPanel=On		
New York Email Activity	🗅 Noter	Files	Help +
SAVE & CLOSE 🔛 🖛 🍟 Actions -			
From Administrator			
*To, cbrown@somewhere.con			
CC:			
Subject Welcome to the system			
Message Details			
Welcome to MYOB Advanced Hello Cleveland, Your MYOB Advanced user account has been created. Please log in using the following credentials: URL: https://demo-portal.myobadvanced.com/ Username: cbrown@somewhere.com Password: ocM@joCg Sign In Premage has been and advanced to regore			
Love Your Work			

Note: This process creates a new user account in the ERP system linked to the contact. This user account is an external user account and cannot be used to login to the ERP site. The user account can also be created from the Users page (SM.20.10.10).

Adding Wiki Pages to the Customer Portal

Management of the customer portal wiki can be completed by a portal administrator from within the customer portal.

A portal administrator can complete the following basic tasks:

- Add new site map nodes, sub-sections and wiki pages to different areas of the portal
- Edit existing wiki pages
- Remove wiki pages

Management of the wiki and portal site map is done via the various configuration screens within the customer portal.

Adding a wiki to the Documentation section of the portal

- 1. Open the wiki management page (SM.20.20.05) and create a new wiki to hold all the relevant articles.
- 2. Select the appropriate site map location.

Note: By default, the portal users and portal admin roles have their access revoked for new wikis. This should be changed to ensure portal admins can create the content and portal users can see the content.

O Wiki							
🖬 🗠 + 🖬	к <	> >I	Clear V	/iki DITA ▼			
* ID:	Marketing	ر	ρ	Site Map Location:	Docu	mentation	Q
* Name:	Marketing			Site Map Title:	Mark	eting	
* Approval Group:				Article Type:	Articl	e	Ŧ
	Require Approv	val		Created by:	matt.	sealy@myob.	com
Approver ID:				Created:	13/05	5/2015 02: ⁻	
	Hold on Edit			Template:			Q
Style:	WikiWebSite	ز	ρ	Print Template:			Q
Print Style:	WikiWebSite	ز	ρ	Header:			Q
Default Site Map Tag:		j	ρ	Footer:			Q
				Public Virtual Path:			
Access Rights Tags Scri	pts Locales						
	x						
C + × ⊨							
a Role	Gue		tion			Access Rights	
> Internal User		Allows	the use	r to change personal setting	gs, a	Revoked	
MAIN Users		MAINU	Jsers			Revoked	
Management		Genera	l Manag	jement		Revoked	
OfficeAdministrator		Office A	Adminis	trator		Revoked	
Portal Admin	[Access	to port	al configuration		Delete	
Portal Cust Admin		Portal C	Custom	er Admin		View Only	
Portal User		Portal u	lser			View Only	
ReportDesigner		Report	Design	er		Revoked	
Sales		Sales N	Manager			Revoked	
Wiki Admin		Wiki Ac	dministr	ator to set other users acce	ess ri	Delete	
Wiki Author		Role pr	ovides a	access rights for creating V	Viki a	Edit	

Adding Additional Companies to the Customer Portal

The customer portal, once deployed, is available for all company files that exist at the time of deployment.

At the time of release, it is not possible to add to or remove a company from this list via a setup screen in the product, however, if a customer does want to add additional companies, or remove any existing companies from the list of available companies in the portal they should log an Archie request to alter the provisioned state of the portal, providing a list of company ID's to add or remove.

Note: Configuration of this list by the business partner or customer will be available in a future release.