SYSPRO Supply Chain Portal

SYSPRO 8

Reference Guide

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SYSPRO

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SYSPRO Supply Chain Portal

Exploring

Where it fits in?

In today's digital world, online web portals have become the connection point for organizations.

Self-service that maximizes the efficiency of every interaction is key and drives the top concerns of any organization by empowering users, having connected interactions across channels, and enabling organizations to be successful. Therefore, the **SYSPRO Supply Chain Portal** allows users beyond a SYSPRO site to connect, interact and transact using the ***SYSPRO Web UI (Avanti)*** HTML5 user interface.

This is achieved by creating SYSPRO portal users with the access to the relevant functional role(s).

Functional roles

The following functional roles are currently available from the **SYSPRO Supply Chain Portal**:

- Request for Quote System (RFQ):

  *Available from **SYSPRO 8 2019 R2***

  Collaborate with your suppliers by automating the quote process and servicing of the RFQ by the supplier.

- Supplier Account Management (SAM):

  *Available from **SYSPRO 8 2021 R2***

  Enhance your procurement activities with the provision of account management capabilities for your end-suppliers.

- Customer Account Management (CAM):

  *Available from **SYSPRO 8 2021 R2***

  Provide enhanced account management capabilities for your existing end-customers.

These functional roles will be extended as the capabilities of the feature grows.

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Benefits

Request for Quote System:

- RFQs can be sent directly to suppliers via the portal.
- Quotations can be submitted online by the suppliers themselves.

Supplier Account Management:

- End-suppliers have direct access to information relating to their account, including transaction details.
- Self-service access reduces the administrative burden of sending and requesting supplier-specific information through other communication channels.
- Immediate availability of information to the supplier can reduce supplier lead times and increase opportunities to take advantage of any early settlement discounts offered by the supplier.
- End-suppliers can download the following document types in PDF format, as required:
  - Remittance advices

Customer Account Management:

- End-customers have direct access to information relating to their account, including transaction details.
- Self-service access improves the administrative response time to communicate customer-specific information.
- The average accounts receivable turnaround time is reduced for the SYSPRO company because of the immediate availability of information to the end-customer.
- End-customers can download the following document types in PDF format, as required:
  - Invoices
  - Credit notes
  - Debit notes
  - Statements

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Portal user security

Adding portal users to your SYSPRO configuration provides external user access to specific functionality (using a dedicated user interface and menu system) based on the portal features available.

The portal's security ensures that the correct access is given to each portal user and that your end-supplier or customer can't access any unauthorized information.

This is achieved by each portal user being linked to a specific supplier or customer account from the SYSPRO company and then linked to a functional portal role. When logging in, portal users are then presented with a landing page determined by their functional role(s) that includes insights into the relevant information.

> **FOR EXAMPLE:**
>
> **Supplier Account Management** functional roles include insights such as agreed invoice terms, outstanding balances, etc.
>
> **Customer Account Management** functional roles include insights such as credit standing, receivable days outstanding, etc.

Administrators can easily configure security access for each portal user by defining an operator as a portal user; configuring each portal role with the appropriate access; and assigning the correct functional roles to the portal operators.

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Portal Administration Management

The administrative management capabilities of the **SYSPRO Supply Chain Portal** allow administrators and account managers (both Sales and Procurement alike) to maintain which employees at their suppliers and customers have access to the portal.

In a multi-company environment, you can link SYSPRO operators to a portal supplier or portal customer (per company) so that they can manage the specific customer and supplier accounts for access to the portal (i.e. the supplier/customer doesn't need to have the same key in all companies from which they transact).

You can also define and customize a dynamic landing page for each of your functional roles to determine the individual applications (i.e. features and functionality) available to each portal user.

The ability to manage your own portal provides you with the following:

- Improved user experience
- Increased configuration flexibility
- Improved integration
- Effective portal access security

This leads to increased collaboration and visibility throughout the supply chain and portal users gain access only to those portions of the portal that they require.

Navigation

The programs related to this feature are accessed from the **Program List** of the SYSPRO menu:

- *Program List* > *Administration* > *Security*

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Terminology

End-customer

This indicates a customer that is registered in the **AR Customer Master** table (ArCustomer) of your company database.

End-customers can be assigned the **Customer Account Management** functional role for account management capabilities within the **SYSPRO Supply Chain Portal**.

End-supplier

This indicates a supplier that is registered in the **AP Supplier Master** table (ApSupplier) of your company database.

End-suppliers can be assigned the **Supplier Account Management** functional role for account management capabilities within the **SYSPRO Supply Chain Portal**.

Entity

A third-party organization or service provider that collaborates with a company to enhance its supply chain operations and may, therefore, require access to the supply chain portal.

Portal user

Portal users are users who have access to the **SYSPRO Supply Chain Portal**.

They differ from regular SYSPRO operators and are configured and licensed separately based on a named-user license model.

When your system is licensed for a number of **Portal Seats**, an administrator can use the **Portal User Management** program to create and maintain portal users.

> **FOR EXAMPLE:**
>
> If you have a license for `1000 Portal Seats` then you can create and maintain up to 1000 **Active Portal Users**, each of which can use the **SYSPRO Supply Chain Portal** at the same time.
>
> This has no effect on any other SYSPRO user licenses.

When creating a portal user, you assign an email address as the unique identifier against which the portal user will access the portal.

A unique operator code is generated against which all transaction journals are recorded. This generated operator code is not shown to portal users, but can be viewed from within the **Portal User Management** program and when viewing journals and other logs of using regular SYSPRO functions.

Portal Seat

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This is a system-wide number of named-users that can be included in your SYSPRO license.

You can create portal users up to the number of licensed **Portal Seats**.

Each portal user is a single person who has access to the **SYSPRO Supply Chain Portal**.

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Starting

Prerequisites

Installing

This feature is installed using the **SYSPRO Installer**.

Licensing

To use the **SYSPRO Supply Chain Portal**, you must purchase and configure one or more **Portal Seats** according to the terms of your software license agreement.

All portal users count towards the license check, even if their status is DISABLED. However, portal users with a status of REMOVED are not counted in the number of seats used. Portal users flagged as REMOVED are retained for historical purposes to identify operator details when viewing audits and logs.

In addition, each of the functions available from the **SYSPRO Supply Chain Portal** will require the appropriate SYSPRO module to be licensed.

Currently, the following module license requirements apply:

Request for Quote System:

- Purchase Orders

Supplier Account Management:

- Accounts Payable

Customer Account Management:

- Accounts Receivable

Technology

The following technology prerequisites are applicable to using this feature:

- Microsoft .NET Framework 4.8
- SYSPRO 8 Service Upgrade Manager
- SYSPRO 8 Avanti Initialization Service
- Internet Information Services (IIS) 7.0 Core Web Engine Feature
- Internet Information Services (IIS) 7.0 World Wide Web Publishing Feature
- SYSPRO 8 Reporting Host Service

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Setup Options

To use this feature, the following setup option(s) must be enabled:

General

Setup Options > Company > General

- Supply chain portal URL

Connectivity System Setup

Setup Options > System Setup > Connectivity

- SMTP server IP address
- Outgoing email address
- Username
- Password
- Server port
- Use SSL

SMTP settings are required for the **Forgot Password** functionality within the **SYSPRO Supply Chain Portal**.

Reporting System Setup

Setup Options > System Setup > Reporting

- Reporting:
  - Reporting configuration

    This must be defined as **Server-side reporting using SQL**.
- Server-side configuration:
  - Reporting service

    This must indicate the address to the reporting host service.

These settings are required to provide portal users with the ability to print documents via the **SYSPRO Supply Chain Portal**.

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SQL System Setup

Setup Options > *System Setup* > *SQL*

- SRS reporting database connection:
  - SRS authentication
  - SRS SQL Server name
  - SRS login
  - SRS login password

Security

You can secure this feature by implementing a range of controls against the affected programs. Although not all these controls are applicable to each feature, they include the following:

- You restrict operator access to *activities* within a program using the **Operator Maintenance** program.
- You can restrict operator access to the *fields* within a program (configured using the **Operator Maintenance** program).
- You can restrict operator access to *functions* within a program using passwords (configured using the **Password Definition** program). When defined, the password must be entered before you can access the function.
- You can restrict access to the eSignature *transactions* within a program at operator, group, role or company level (configured using the **Electronic Signature Configuration Setup** program). Electronic Signatures provide security access, transaction logging and event triggering that gives you greater control over your system changes.
- You can restrict operator access to *programs* by assigning them to groups and applying access control against the group (configured using the **Operator Groups** program).
- You can restrict operator access to *programs* by assigning them to roles and applying access control against the role (configured using the **Role Management** program).

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Restrictions and Limits

- **Multi-Factor Authentication** and **SSO using Active Directory** are not currently supported for the **SYSPRO Supply Chain Portal** (i.e. an operator who is configured to use **Multi-Factor Authentication** or **SSO using Active Directory** won't be able to login to this platform).
- Currently, the **SYSPRO Supply Chain Portal** can only be installed for a single company.

  If you require portals for multiple companies, you can install the **SYSPRO Supply Chain Portal** for the first company and then install the **Additional Supply Chain Portal Service** for each of the additional companies.

- The ability to customize the logo and background image of the **SYSPRO Supply Chain Portal** is not yet available, but will be included in a later release of ***SYSPRO 8***.
- Although technically possible, we don't recommend you duplicate an email address of a portal user amongst non-portal users.

  For this reason the **Portal User Management** and **Operator Maintenance** programs prevent you from entering a duplicate email address amongst all operators (of any type).
- The ability to print documents from the **SYSPRO Supply Chain Portal** is only available with **Server-side Reporting**.
- Archiving functionality is disabled when printing documents from the **SYSPRO Supply Chain Portal** (even if the archiving flag against the template being used is enabled).

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Solving

FAQs

General

Where do I find the URL for the SYSPRO Supply Chain Portal?

Once you have installed the **SYSPRO Supply Chain Portal** you can view the URL link from the following location of the machine to which the software is installed:

`\inetpub\wwwroot\SYSPROSupplyChainPortal_"companyID"\index.html`

However, the URL used for the **SYSPRO Supply Chain Portal** is:

`http://{DNS_Name}/SYSPROSupplyChainPortal_{CompanyId}`, as configured against the **SUPPLY CHAIN PORTAL URL** setup field within the **Setup Options** program (*Setup Options* > *Company* > *General*).

What is the recommended browser to use for the SYSPRO Supply Chain Portal?

Although you can use any browser, we recommend **Google Chrome** as all of SYSPRO's development and testing is performed on **Google Chrome**.

Due to non-standardization among browsers, it isn't possible to test on every browser available. We test on **Google Chrome** due to it currently having the largest user base by a very large margin.

How do I customize the logo and background image of the portal?

This functionality is planned for a later release.

What should I do if the login screen hangs?

If the login screen of the **SYSPRO Supply Chain Portal** hangs, however the operator name is displayed below the login prompt (i.e. the system has resolved the operator code entered), then press CTRL+F5 to force a refresh.

Your login can then proceed as normal.

How does SSO Identity Provider Integration enhance the Supply Chain Portal?

The **SYSPRO Supply Chain Portal** utilizes the **Web authentication** settings (as defined within the **Setup Options** program - *Setup Options* > *System Setup* > *Login*) and performs in the same manner as the SYSPRO Web UI (Avanti).

The only difference when logging in via the SYSPRO Supply Chain Portal, is the absence of the company sign-in page, as this doesn't apply in a portal environment.

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Therefore, once you configure the **Web authentication** settings, both the SYSPRO Web UI (Avanti) and SYSPRO Supply Chain Portal will automatically utilize the SSO Identity Provider Integration capability.

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Portal operators and users

What is the difference between a service operator and a normal operator?

Service operators are signed in by a *SYSPRO service* and are used for any functionality that is required by the service to obtain information about SYSPRO.

Normal operators sign in to SYSPRO with a username and password. They access certain programs and functions to perform specific tasks.

> **FOR EXAMPLE:**
>
> the __SRS service operator is used by the **SYSPRO 8 Reporting Host Service** to obtain information about the companies in an environment, but it isn't used by the business object to retrieve the data for a report, as that would be the specific normal operator that submits the request for the report.

What are service operators and what are they used for?

Service operators are created by SYSPRO and are used by SYSPRO services to obtain information about SYSPRO.

The service operator code starts with a double underscore to differentiate them from other operators. A default company code must be assigned to each service operator within the **Operator Maintenance** program, as we use the company code to log in the service operator via e.net .

The following is a list of service operators and their function within SYSPRO:

- The __ADSYNC service operator is used by the **SYSPRO 8 Active Directory Sync Service** to push **Microsoft Active Directory (AD)** information into SYSPRO for Active Directory managed operators.
- The __DFM service operator is used by the **SYSPRO 8 Document Flow Manager Folder Poller** and **SYSPRO 8 Document Flow Manager Queue Poller** to monitor folders, send files to the queue and process files.
- The __ESP service operator is used by the following services:
  - **SYSPRO 8 Espresso Service**,
  - **SYSPRO 8 Espresso Notification Service**,
  - **SYSPRO Espresso Development Plugin** and the
  - **SYSPRO Avanti Web Service** to obtain information for the password reset and forgot password functionality.
- The __POS service operator is used by the **SYSPRO 8 Point of Sale Services** to determine and validate the setup options and required credentials at start up, update the required databases and post to SYSPRO (if the Point of Sale operator doesn't have access to SYSPRO).

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- The __RUL service operator is used by the **SYSPRO 8 Rules Engine Service** and the **SYSPRO 8 Rules Data Service**.
- The __SA service operator is used by the **SYSPRO 8 Analytics** service to make business object calls.
- The __SAI service operator is used by the **SYSPRO 8 Machine Learning** service.
- The __SRS service operator is used by the **SYSPRO 8 Reporting Host Service** and the **SYSPRO 8 Cognitive Service** to manage client-side report printing.

- Only specific services use service operators to log in via e.net.
- SYSPRO creates service operators by copying the ADMIN operator. If the ADMIN operator record doesn't exist (i.e. it may have been deleted), then the current operator is used when saving system details from the **Setup Options** program.

What are template operators and what are they used for?

Template operators are blue print operators that can be used to create other operators. The configurations or settings applied to the template operator, will then be applied to all operators that are created from the template operator.

- You can't log into SYSPRO using a template operator.
- Portal users are created from a template operator, i.e. you have to create the template operator first using the **Operator Maintenance** program, before you can create a portal user.

What are portal operators and what are they used for?

Portal users are created by system administrators and are used to log into the **SYSPRO Supply Chain Portal**. Portal operators can't log into the ***SYSPRO Desktop*** or ***SYSPRO Web UI (Avanti)***.

- Portal users are created from a template operator, i.e. you have to create the template operator first using the **Operator Maintenance** program, before you can create a portal user.
- Portal users are created using the **Add Portal User** program.

How do I create a template operator?

The following describes how to create the operator **Template** that is required for the creation of portal users in the **Portal User Management** program.

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1. Open the **Operator Maintenance** program (*SYSPRO Ribbon bar* > *Setup* > *Operators*).

   Reset your toolbar to ensure that all the latest functions and options are visible.

2. From the **Edit** menu, select **Maintain templates**.
3. From the toolbar, enter the template code in the **Template** field and press `TAB`.
4. From the **Operator Details** pane, enter the following mandatory fields:
   - Operator name
   - Operator group

   For the remaining fields, enter any other information you require for the template, or accept the defaults provided.
5. From the **E.net** pane:
   a. Specify the **FUNCTIONAL ROLE** as **03-Supplier**.
   b. Specify the **USAGE FOR E.NET BUSINESS OBJECTS** as **No access**.
   c. Specify the **CUSTOMER SELECTION** as **Selection**.
6. Save the operator template.
7. Exit the **Operator Maintenance** program.

How do I identify a template operator record?

Template operator codes are prefixed with `__Template_` and their operator type records as **Template**.

How do I create a portal operator?

The following indicates the steps required to create a Portal user that can use the **SYSPRO Supply Chain Portal**:

1. Open the **Portal User Management** program (*Program List* > *Administration* > *Security*).
2. Select the **Add Portal User** function.

   The **Add Portal User** window is displayed.
3. Select the hyperlink of the required operator template from the **Templates** listview to populate the **Copy from template** field in the **Add Portal User** pane.
4. Configure the following fields for the portal operator:

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- **Email**

  This must be unique amongst all operators.

- **Name**

- *The following is determined by the functional role you require:*

  Supplier (When creating a portal user for the **Supplier Account Management** role)

  > This supplier code is used as the default **PORTAL SUPPLIER** in the **Operator Maintenance** program when you save the operator record.

  Customer (When creating a portal user for the **Customer Account Management** role)

  > This customer code is used as the default **PORTAL CUSTOMER** in the **Operator Maintenance** program when you save the operator record.

- **Location**

  Optionally enter the physical location of the operator.

- **Default company**

  This must be specified to ensure that only a single company can be used to login to the portal.

- **Initial Password**

  This is automatically populated and based on the email address entered in the **Email** field, but can be changed as required.

5. Select the **Save and Close** function to save the portal operator and exit the **Add Portal User** screen.

   > Alternatively, select the **Save and Edit** function to save the details entered and open the **Operator Maintenance** program to make additional changes to the operator record.

6. Activate the new portal operator by highlighting the operator entry and selecting the **Activate Users** option from the toolbar.
7. Exit the **Portal User Management** program.

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How do I assign functional role(s) to a portal user?

1. Open the **Portal User Management** program (*Program List* > *Administration* > *Security*).
2. Navigate to the portal user to which you want to assign a functional role.
3. Select the **Maintain role** hyperlink in the **Role action** column to launch the **Portal User Role Management** program.

   This column is hidden by default and can be added using the **Field Chooser** function.

4. Indicate which functional role(s) must be assigned to the portal user by selecting the appropriate checkbox in the **Select** column.
5. Select the **Save** function.
6. Exit the **Portal User Management** program.

How is the login password generated for portal operators?

When first creating a portal operator, the password is automatically created using the operator's email address.

You can then notify the portal user of the login credentials and advise them to change this password (using the **Change Password** option) when they first access the **SYSPRO Supply Chain Portal**.

How do I disable a portal operator from accessing the portal?

From within the **Portal User Management** program, select the **Disable** option against the operator and enter a reason at the **Reason Code** field.

How do I delete a portal operator?

From within the **Portal User Management** program, select the **Delete** option against the operator and enter a reason at the **Reason Code** field.

Can a regular SYSPRO operator login to the SYSPRO Supply Chain Portal?

Only portal users created within the **Portal User Management** program can access the **SYSPRO Supply Chain Portal**.

Portal users are designed to have limited access to portal-specific functions, whereas regular SYSPRO operators have access to a much wider range of functionality.

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What is required for existing SYSPRO Supply Chain Portal users after SYSPRO 8 2021 R2?

If you had already installed the **SYSPRO Supply Chain Portal** prior to ***SYSPRO 8 2021 R2*** and the introduction of functional roles, then your system administrator must assign the appropriate portal roles to your portal operator record within the **Portal User Management** program.

Can a portal user be assigned to more than one customer/supplier account?

Not at this present time, however this functionality may be considered for introduction with a later release of SYSPRO 8.

Printing documents

How do I add parameter defaults for statement printing from the Supply Chain Portal?

The following additional parameter defaults can be defined against the **SYSPROPortalARStatementParameter** XML parameter using the **Custom Configuration** program:

- Balance Type
- Minimum Balance
- Sales Message

You can define these parameters as follows:

1. Open the **Custom Configuration** program (*Program List* > *Administration*).
2. Within the **Configuration Items** pane, expand the folder structure as follows:

   Available Configurations > **SYSPRO** > **XML Parameters**
3. Navigate to and select the **SYSPROPortalARStatementParameter** item.

   This populates the **XML parameters** pane.
4. Define the parameters as required within the **Store data** column.
5. Select the **Save** function

   The **Custom Configuration Options** program is launched.
6. Under the **Configuration item details** section, define the **Item level** as required and enter the supporting field where applicable.

> **FOR EXAMPLE:**
>
> If you define the **Item level** as `Company`, then you must indicate the relevant company

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code within the **Company** field.

7. Select the **Save** function.

   This returns you to the **Custom Configuration** program.

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Portal Administration Management

How do I create a dynamic portal landing page?

The following steps detail how to define and customize a dynamic landing page for each of your functional roles, per company.

> This lets you determine the individual applications (i.e. features and functionality) available to each portal user and therefore control each portal user's access.

1. Open the **Portal Role Application Configuration** program (*Program List* > *Administration* > *Setup*).
2. At the **Company** toolbar field, indicate for which company you want to create a dynamic landing page.
3. At the **Landing page** toolbar field, indicate a unique name for the landing page you want to create, and tab off your entry.
4. Within the **Assign** column of the **Portal Landing Page** listview, select the functional role(s) you want included within your landing page.
5. Within the **Section title** column, accept the default title provided or change this according to your requirements.
6. Use the check box within the **Collapsible** column to indicate if you want the section to be collapsible within the landing page.
7. From the **Action** column, select the **Configure applications** link.

   This opens the **Landing Page Properties** window, which lists the applications available for the selected functional role.

   a. Using the check boxes within the **Assigned** column, indicate which applications you want included on the landing page.

   b. Customize your landing page further by using the drop down or browse icons against the following columns:

      - Width
      - Icon
      - Icon color
      - Background color
      - Foreground color

   c. Select the **Save** function.

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If you selected more than one functional role for your landing page, repeat this step for each role.

8. Exit the **Portal Role Application Configuration** program.

You have successfully created a dynamic landing page for your portal users.

If you later want to remove a functional role from the landing page, simply deselect the check box in the **Assigned** column of the **Portal Role Application Configuration** program.

How do I assign a dynamic portal landing page to a portal user?

The following steps detail how to assign a dynamic landing page to a portal user:

1. Open the **Portal User Management** program (*Program List* > *Administration* > *Security*).
2. Locate the portal user you want to maintain and select the **Maintain role** link within the **Role action** column of the listview.

   The **Portal User Role Management** program is launched.
3. Select the **Use Dynamic Landing Page** toolbar function.

   Selecting this option only occurs once. Selecting the **Maintain role** link on subsequent returns to the **Portal User Management** program will take you directly to the **Assign Portal Landing Page to Operator** program.

   Currently, you can't revert back to using the static landing page once you select the **Use Dynamic Landing Page** option.
4. The **Assign Portal Landing Page to Operator** program is launched.

   Proceed as follows for each company listed against the portal user:

   a. Select the browse icon from the **Landing page** column.

   b. Select the applicable landing page from the list displayed to be used for this portal user, for the specified company.

   c. Select the **Save** function.
5. Exit the **Portal User Management** program.

Your newly assigned landing page will be presented to the portal user when they next log into the portal.

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How do I define the customer or supplier code per company for a portal operator?

In a multi-company environment, the following steps explain how to configure a customer and/or supplier account against a SYSPRO operator (configured as a portal user) per company:

1. Open the **Operator Maintenance** program (*SYSPRO Ribbon bar* > *Setup* > *Operators*).
2. Select the operator code for the portal user you want to configure.
3. Navigate to the **PORTAL USER** section within the **Options** pane.
4. Select the **Configure portal operators per company** link.

   The **Configure Portal User per Company** program is launched.
5. Within the **Customer** and **Supplier** columns of the listview, indicate the specific customer code and/or supplier code for each company listed.
6. Select the **Save** function.

   You are returned to the **Operator Maintenance** program.
7. Exit the **Operator Maintenance** program.

You have now managed the portal user's specific customer and supplier accounts for access to the portal (i.e. the supplier/customer doesn't need to have the same key in all companies from which they transact).

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Microsoft SQL Server

Where is portal user information stored in Microsoft SQL Server?

Database	Table Name	Related Data
System-wide	AdmOperator	This table stores the following: ▪ A flag indicating if an operator is configured to use a dynamic portal landing page
System-wide	AdmOperCompPortal	This table stores the following: ▪ Portal supplier per company, per SYSPRO operator ▪ Portal customer per company, per SYSPRO operator
System-wide	AdmPorAppProperty	This table stores the following: ▪ Portal role application properties per landing page
System-wide	AdmPortalPage	This table stores the following: ▪ Portal landing page per company
System-wide	AdmPorUserPage	This table stores the following: ▪ Portal user landing page per company, per portal user
System-wide	AdmOperAmendJnl	This table records an audit of all changes to an operator record.

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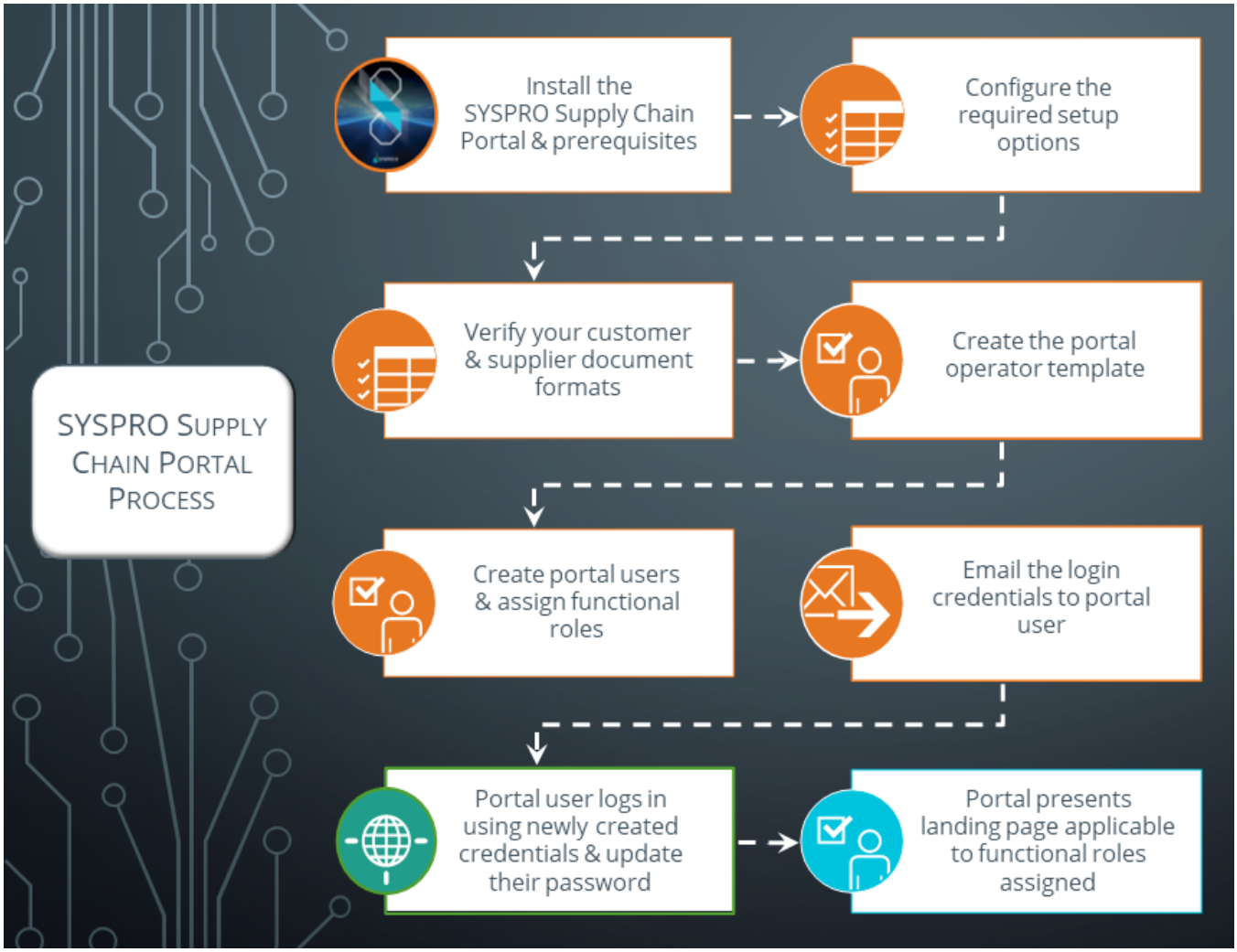
Using

Process



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The following depicts the process required to set up the **SYSPRO Supply Chain Portal** and its associated portal users:

1. Installation:

   Install the following using the **SYSPRO Installer** application:

   - SYSPRO Supply Chain Portal

     Including any prerequisites not installed as yet:

     - Microsoft .NET Framework 4.8
     - SYSPRO 8 Service Upgrade Manager
     - SYSPRO 8 Avanti Initialization Service
     - Internet Information Services (IIS) 7.0 Core Web Engine Feature
     - Internet Information Services (IIS) 7.0 World Wide Web Publishing Feature
     - SYSPRO 8 Reporting Host Service

2. Configure the required options in the **Setup Options** program:

   a. *Setup Options* > *Company* > *General*:

   Ensure that your specific website address is defined against the **SUPPLY CHAIN PORTAL URL** option.

   > **FOR EXAMPLE:**
   >
   > `http://{DNS_Name}/SYSPROSupplyChainPortal_{CompanyId}`

   b. *Setup Options* > *System Setup* > *Reporting*:

   Ensure that the **REPORTING CONFIGURATION** is defined as **Server-side reporting using SQL** and that the **REPORTING SERVICE** field is defined with the correct address to the **SYSPRO 8 Reporting Host Service**.

   This ensures that portal users have the ability to print documents from the **SYSPRO Supply Chain Portal**.

3. Check your document formats:

   Ensure that the following document formats and templates are defined appropriately for the supplier or customer accounts to which you want to assign portal users.

   - Remittance advices (Configurable within the **AP Check Format for SRS** program)
   - Invoices, Credit notes and Debit notes (Configurable within the **SO Document Format for SRS** program)
   - Statements (Configurable within the **AR Statement Format for SRS** program)

4. Create the portal operator template (required for the creation of portal users in the **Portal User Management** program):

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a. Open the **Operator Maintenance** program (*SYSPRO Ribbon bar* > *Setup* > *Operators*).

> Reset your toolbar to ensure that all the latest functions and options are visible.

b. From the **Edit** menu, select **Maintain templates**.

c. From the toolbar, enter the template code in the **Template** field and press TAB.

d. From the **Operator Details** pane, enter the following mandatory fields:

- Operator name
- Operator group

For the remaining fields, enter any other information you require for the template, or accept the defaults provided.

e. From the **E.net** pane:

a. Specify the **FUNCTIONAL ROLE** as **03-Supplier**.

b. Specify the **USAGE FOR E.NET BUSINESS OBJECTS** as **No access**.

c. Specify the **CUSTOMER SELECTION** as **Selection**.

f. Save the operator template.

g. Exit the **Operator Maintenance** program.

5. Create the portal user:

a. Open the **Portal User Management** program (*Program List* > *Administration* > *Security*).

b. Select the **Add Portal User** function.

The **Add Portal User** window is displayed.

c. Select the hyperlink of the required operator template from the **Templates** listview to populate the **Copy from template** field in the **Add Portal User** pane.

d. Configure the following fields for the portal operator:

- **Email**

  This must be unique amongst all operators.

- **Name**

- *The following is determined by the functional role you require:*

  Supplier (When creating a portal user for the **Supplier Account Management** role)

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- This supplier code is used as the default **PORTAL SUPPLIER** in the **Operator Maintenance** program when you save the operator record.

  Customer (When creating a portal user for the **Customer Account Management** role)

  This customer code is used as the default **PORTAL CUSTOMER** in the **Operator Maintenance** program when you save the operator record.

- **Location**

  Optionally enter the physical location of the operator.

- **Default company**

  This must be specified to ensure that only a single company can be used to login to the portal.

- **Initial Password**

  This is automatically populated and based on the email address entered in the **Email** field, but can be changed as required.

e. Select the **Save and Close** function to save the portal operator and exit the **Add Portal User** screen.

   Alternatively, select the **Save and Edit** function to save the details entered and open the **Operator Maintenance** program to make additional changes to the operator record.

f. Activate the new portal operator by highlighting the operator entry and selecting the **Activate Users** option from the toolbar.

g. Exit the **Portal User Management** program.

6. Assign the required functional role(s) to the portal user:

   a. Open the **Portal User Management** program (*Program List* > *Administration* > *Security*).

   b. Navigate to the portal user to which you want to assign a functional role.

   c. Select the **Maintain role** hyperlink in the **Role action** column to launch the **Portal User Role Management** program.

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> This column is hidden by default and can be added using the **Field Chooser** function.

d. Indicate which functional role(s) must be assigned to the portal user by selecting the appropriate checkbox in the **Select** column.

e. Select the **Save** function.

f. Exit the **Portal User Management** program.

7. *(Optional)* Define a dynamic landing page for your portal operators, per company:

   a. Open the **Portal Role Application Configuration** program (*Program List* > *Administration* > *Setup*).

   b. At the **Company** toolbar field, indicate for which company you want to create a dynamic landing page.

   c. At the **Landing page** toolbar field, indicate a unique name for the landing page you want to create, and tab off your entry.

   d. Within the **Assign** column of the **Portal Landing Page** listview, select the functional role(s) you want included within your landing page.

   e. Within the **Section title** column, accept the default title provided or change this according to your requirements.

   f. Use the check box within the **Collapsible** column to indicate if you want the section to be collapsible within the landing page.

   g. From the **Action** column, select the **Configure applications** link.

      This opens the **Landing Page Properties** window, which lists the applications available for the selected functional role.

      i. Using the check boxes within the **Assigned** column, indicate which applications you want included on the landing page.

      ii. Customize your landing page further by using the drop down or browse icons against the following columns:

         - Width
         - Icon
         - Icon color
         - Background color
         - Foreground color

      iii. Select the **Save** function.

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If you selected more than one functional role for your landing page, repeat this step for each role.

h. Exit the **Portal Role Application Configuration** program.

Next you need to assign the landing page to your portal users:

a. Open the **Portal User Management** program (*Program List* > *Administration* > *Security*).

b. Locate the portal user you want to maintain and select the **Maintain role** link within the **Role action** column of the listview.

The **Portal User Role Management** program is launched.

c. Select the **Use Dynamic Landing Page** toolbar function.

Selecting this option only occurs once. Selecting the **Maintain role** link on subsequent returns to the **Portal User Management** program will take you directly to the **Assign Portal Landing Page to Operator** program.

Currently, you can't revert back to using the static landing page once you select the **Use Dynamic Landing Page** option.

d. The **Assign Portal Landing Page to Operator** program is launched.

Proceed as follows for each company listed against the portal user:

i. Select the browse icon from the **Landing page** column.

ii. Select the applicable landing page from the list displayed to be used for this portal user, for the specified company.

iii. Select the **Save** function.

e. Exit the **Portal User Management** program.

8. Email the following information and login credentials to the portal user:

- **SYSPRO Supply Chain Portal** URL
- Username (i.e. email address)
- Password

Ensure to advise portal users to change their password using the **Change Password** option when they first login to the **SYSPRO Supply Chain Portal**. The operator password in SYSPRO is then updated to the new password defined by the portal user.

Request for Quote System Considerations

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- Depending on how your security is configured, you'll need to give either the portal operator (or its operator group) access to the **Supplier Quote Entry** program, so that they can use it in the **SYSPRO Supply Chain Portal**.
- All suppliers are given the same URL, however access is controlled in the background where users can only see quotes pertaining to the supplier code assigned to their portal user.

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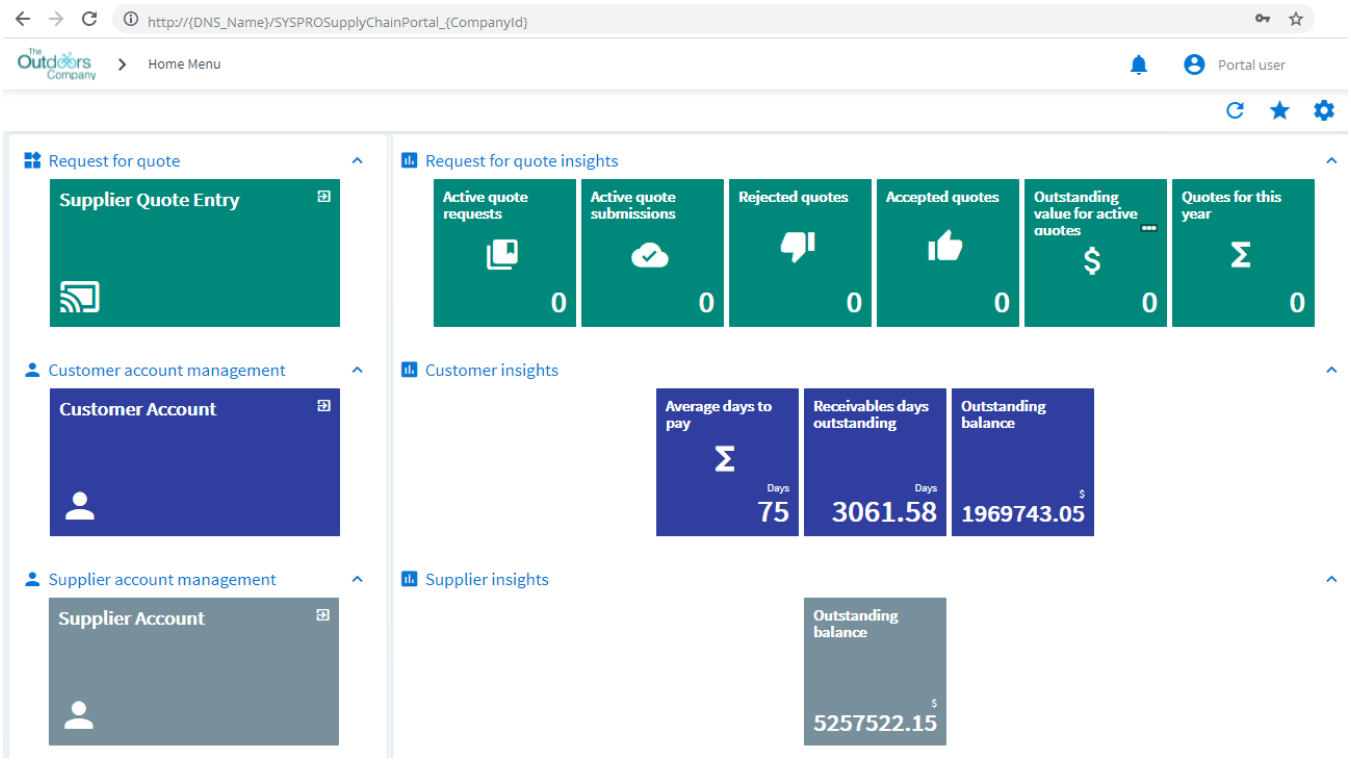
Functions and Insights by Functional Role



When a portal user logs into the **SYSPRO Supply Chain Portal**, they are presented with a landing page determined by their assigned functional role(s) that provides the following functions and insights relevant to their account:

Request for Quote System:

- Functions :
  - Supplier Quote Entry
- Insights:
  - Active quote requests
  - Active quote submissions
  - Rejected quotes
  - Accepted quotes
  - Outstanding value for active quotes
  - Quotes for this year

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Customer Account Management:

- Functions:
  - Customer Account Query

    Selecting this function launches the **AR Customer Account Query** program which includes the following information (as recorded against the customer within the SYSPRO company):
    - Account status
    - Credit status
    - Currency
    - Credit standing (i.e. outstanding balance, invoice terms, credit limit)
    - Last sale and payment dates
    - Customer type (if the customer account assigned to the portal user is part of a master / sub account structure)
    - Contact information and addresses
    - Links that provide access to the following listviews with export to PDF or Excel functionality and filter options that can be used to interrogate data:
      - Invoices
      - Payments
      - Sales orders
      - Master sub-accounts
      - Statements
    - Graphs:
      - Ageing
      - Sales history
- Insights:
  - Average days to pay
  - Receivables days outstanding
  - Outstanding balance

All transaction and balance values are displayed in the customer's base currency.

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Supplier Account Management:

- Functions:
  - Supplier Account Query

    Selecting this function launches the **Supplier Account Query** program which includes the following information (as recorded against the supplier within the SYSPRO company):
    - Account status
    - Account information (e.g. current invoice terms, currency, credit limit, etc.)
    - Contact information and addresses
    - Ordered not received (i.e. all active purchase orders with an outstanding quantity)
    - Received not invoiced (i.e. all unmatched GRNs)
    - Outstanding balance (i.e. all open invoices that determine the outstanding balance)
    - Date of last purchase and payment
    - Purchase order history (i.e. monthly purchase history for the current year)
    - Links that provide access to the following listviews with export to PDF or Excel functionality and filter options that can be used to interrogate data:
      - Invoices
      - Payments
      - Purchase orders
      - Goods received
      - Return to supplier (i.e. all active supplier returns with an outstanding value)
      - Registered credit notes and debit notes
      - Remittance advices
- Insights:
  - Outstanding balance

All transaction and balance values are displayed in the supplier's base currency.

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Printing Documents

Requirements for printing documents from the **SYSPRO Supply Chain Portal** include:

- Only the reprinting of documents is allowed. Therefore, a document must have already been printed by the SYSPRO company before a portal user has access to printing it.
- The ability to print documents from the portal is only available with **Server-side Reporting**. Therefore, only SRS Documents are available for printing.

The following defaults apply when a portal user prints a document from the portal:

Invoices, Credit notes and Debit notes

- Documents can only be printed for the specific customer account assigned to the portal user.
- The document format applied is taken from the `DocumentFormat` column of the SorMasterRep table, as defined against the customer account assigned to the portal user.

Statements

- Statements can only be printed for the specific customer account assigned to the portal user.
- The document format applied is taken from the `ArStatementNo` column of the ArCustomer table, as defined against the customer account assigned to the portal user.
- Portal users can select a statement period from the first month-end date of the previous year, up to the current month-end date.
- The following options are based on the default parameters defined against the portal user's assigned customer account:
  - Balance options
  - Print selection
- The following is based on the ageing options defined against the SYSPRO company to which the portal user belongs:
  - Ageing options

The following additional parameter defaults can be defined against the **SYSPROPortalARStatementParameter** XML parameter using the **Custom Configuration** program:

- Balance Type
- Minimum Balance
- Sales Message

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Remittance advices

- Remittance advices can only be printed for the specific supplier account assigned to the portal user.
- The document format applied is based on the bank defined against the supplier account assigned to the portal user, as recorded within the ApCheckFormat table (or the EftRemitFormat table for EFT remittances).

When the portal user selects the year for which he wants to download his remittances, a list of all the payment runs forming part of that year are returned. The user can then select which one(s) to download and print.

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Affected programs

The following indicates areas in the product that may be affected by implementing this feature:

Setup programs

Setup Options

SYSPRO Ribbon bar > Setup > Setup Options > System Setup > General

The program includes the following operator fields that are related to Supply Chain Portal entities:

- **Administrator approval**

  This lets you indicate if you require approval from a SYSPRO administrator for all new third-party portal users.

- **Notify administrator**

  This notifies the SYSPRO administrator whVien there is a new third-party portal user that must be reviewed.

- **Configure administrator email template**

  This lets you configure the email template using the Send Email program from the email that is sent to the SYSPRO Administrator notifying them that they have access to the **SYSPRO Supply Chain Portal**.

- **Configure notify user email template**

  This lets you configure the email template for the email that is sent to the user notifying them that they have access to the **SYSPRO Supply Chain Portal**.

- **Configure user rejection email template**

  This lets you configure the email template for the email that is sent to the user notifying them that they have not been granted access to the **SYSPRO Supply Chain Portal**.

Operator Maintenance

SYSPRO Ribbon bar > Setup > Operators

The program includes the following operator fields that are related to this feature:

Reset your toolbar to ensure that all the latest options are visible.

- **Operator type**

  `Portal` indicates that the operator is a named user (used only for the **SYSPRO Supply Chain Portal**).

- **Operator status**

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- This indicates the current status of the operator (as recorded in the `OperatorStatus` column of the AdmOperator table):

  `ACTIVE`

  This indicates that the portal user is active and can log into the **SYSPRO Supply Chain Portal**.

  `DISABLED`

  This indicates the portal user was disabled using the **Portal User Management** and cannot log into the **SYSPRO Supply Chain Portal**.

  `REMOVED`

  This indicates the portal user was removed using the **Portal User Management** program and cannot log into the **SYSPRO Supply Chain Portal**.

- **Portal supplier**

  This indicates the supplier code that must be assigned to the portal user when accessing the **SYSPRO Supply Chain Portal**.

- **Portal customer**

  This indicates the customer code that must be assigned to the portal user when accessing the **SYSPRO Supply Chain Portal**.

- **Configure portal operators per company**

  This lets you capture a portal customer and portal supplier against the operator (per company) using the **Configure Portal User per Company** program.

- **Entity user type**

  Indicate whether the user is an administrator:

  - Blank/none – not an entity user
  - Administrator
  - Third-party user

- **Entity**

  Indicate the name of the entity to which the operator belongs if they are a portal user.

- **Approved status**

  Indicate the user's approval status.

- **Rejected reason**

  Indicate the reason if the user's approved status is rejected.

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Company Maintenance

SYSPRO Ribbon bar > Setup > General Setup

The program includes a record of how many **Portal seats** are included with your configured license (under the **System Settings** section).

Portal User Management

Program List > Administration > Security

This program lets administrators create and manage portal operators that require access to the **SYSPRO Supply Chain Portal**.

Things you can do in this program include:

- Create portal operators
- Configure functional roles for portal users
- Disable portal operators
- Remove portal operators
- Activate disabled or removed portal operators
- Delete portal operators
- View portal entity details

Add Portal User

*Accessible from the **Add Portal User** function of the **Portal User Management** program*

This program lets administrators create new portal users that require access to the **SYSPRO Supply Chain Portal**.

Portal User Role Management

*Accessible from the **Maintain role** hyperlink of the **Role action** column in the **Portal User Management** program*

This program lets administrators configure the functional roles for a portal user that requires access to the **SYSPRO Supply Chain Portal**.

The functional roles available for configuration include:

- Request for Quote System (RFQ)
- Customer Account Management (CAM)
- Supplier Account Management (SAM)

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Portal Role Application Configuration

Program List > Administration > Setup

This program lets you define and customize your dynamic landing pages per company for the **SYSPRO Supply Chain Portal**.

Assign Portal Landing Page to Operator

*Initial Access: Accessible from the **Use Dynamic Landing Page** function of the **Portal User Role Management** program*

*Subsequent Access: Accessible from the **Maintain role** hyperlink of the **Role action** column in the **Portal User Management** program*

This program lets you assign dynamic **SYSPRO Supply Chain Portal** landing pages to your portal users, per company.

Configure Portal User per Company

*Accessible from the **Configure portal operators per company** function of the **Operator Maintenance** program*

This program lets you define the portal customer and portal supplier (per company) for a SYSPRO operator that has access to the **SYSPRO Supply Chain Portal**.

Portal Entity Maintenance

Program List > Administration > Security > Portal

This program lets you maintain (add, update and delete) **SYSPRO Supply Chain Portal** entities.

Entity Partner Maintenance

*Accessible from the **Portal Entity Maintenance** program by selecting the hyperlink in the **Partners** column.*

This program lets you configure the customer or supplier per company per entity for the Supply Chain Portal.

Entity Landing Pages

*Accessible from the **Portal Entity Maintenance** program by selecting the hyperlink in the **Landing pages** column.*

This program lets you define the list of landing pages per company for use in the Supply Chain Portal.

Portal Entity User Management

Program List > Administration > Security > Portal

This program lets you maintain third-party portal users.

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Query programs

AR Customer Account Query

This program lets portal users assigned with the **Customer Account Management** functional role view information relating to their specific customer account via the **SYSPRO Supply Chain Portal**.

All transaction and balance values are displayed in the base currency defined against the customer.

> The account access is limited to the customer account defined against the portal user in the **Portal User Management** and **Operator Maintenance** programs.

Supplier Account Query

This program lets portal users assigned with the **Supplier Account Management** functional role view information relating to their specific supplier account via the **SYSPRO Supply Chain Portal**.

All transaction and balance values are displayed in the base currency defined against the supplier.

> The account access is limited to the supplier account defined against the portal user in the **Portal User Management** and **Operator Maintenance** programs.

System Audit Query

Program List > Administration > Security

The program includes auditing and logging capabilities for all operators that are configured as **Portal** operators.

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Affected business objects

The following indicates the business objects that are affected by this feature:

Setup objects

Setup Portal Landing Page

The **SETUP PORTAL LANDING PAGE**[1] business object lets you maintain the details for your portal landing page.

The following functions are available:

- **Add and Update**

  This function either adds or updates the portal landing page (per company) and the portal roles, together with the configured role application properties to which the landing page has been granted access.

- **Delete**

  This function deletes the landing page from the AdmPortalPage table and the page properties from the AdmPorAppProperty table.

COM Setup Operator Delete

The **COM Setup Operator Delete** business object saves the portal customer and portal supplier entries per company.

Transaction objects

COM Operator Copy Transaction

The **COM Operator Copy Transaction** business object copies the portal supplier and portal customer per company configurations when copying an operator.

Query objects

Operator List Report

The **Operator List Report** business object returns the configuration details for your portal supplier and portal customer per company.

[1] Business object: COMSPP

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Query Portal Landing Page

The **QUERY PORTAL LANDING PAGE**[1] business object returns the portal user landing page details when called from the **Portal Role Application Configuration** or **Configure Portal User per Company** programs.

The following information is returned:

- List of portal roles and applications, including their default properties
- List of portal landing pages
- List of role application properties for the current portal landing page per company

AP Supplier Query

The **AP Supplier Query** business object returns the following information related to portal users:

- Information and Contact details
- Insights:
  - Monthly purchase history
- Links:
  - Invoices
  - Payments
  - Purchase Orders
  - Goods Received
  - Registered invoices, credit notes and debit notes

Portal operators are identified when the following entries are defined against the operator record:

- `<SupplierPortal>Y</SupplierPortal>`
- `<SupplyChainPortal>Y</SupplyChainPortal>`

[1] Business object: COMQPP

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AR Customer Query

The **AR Customer Query** business object returns the following information related to portal users:

- Information and Contact details
- Customer Master/Sub account relation
- Insights:
  - Ageing
  - Sales history
- Links:
  - Invoices
  - Payments

Portal operators are identified when the following entries are defined against the operator record:

- `<CustomerPortal>Y</CustomerPortal>`
- `<SupplyChainPortal>Y</SupplyChainPortal>`

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