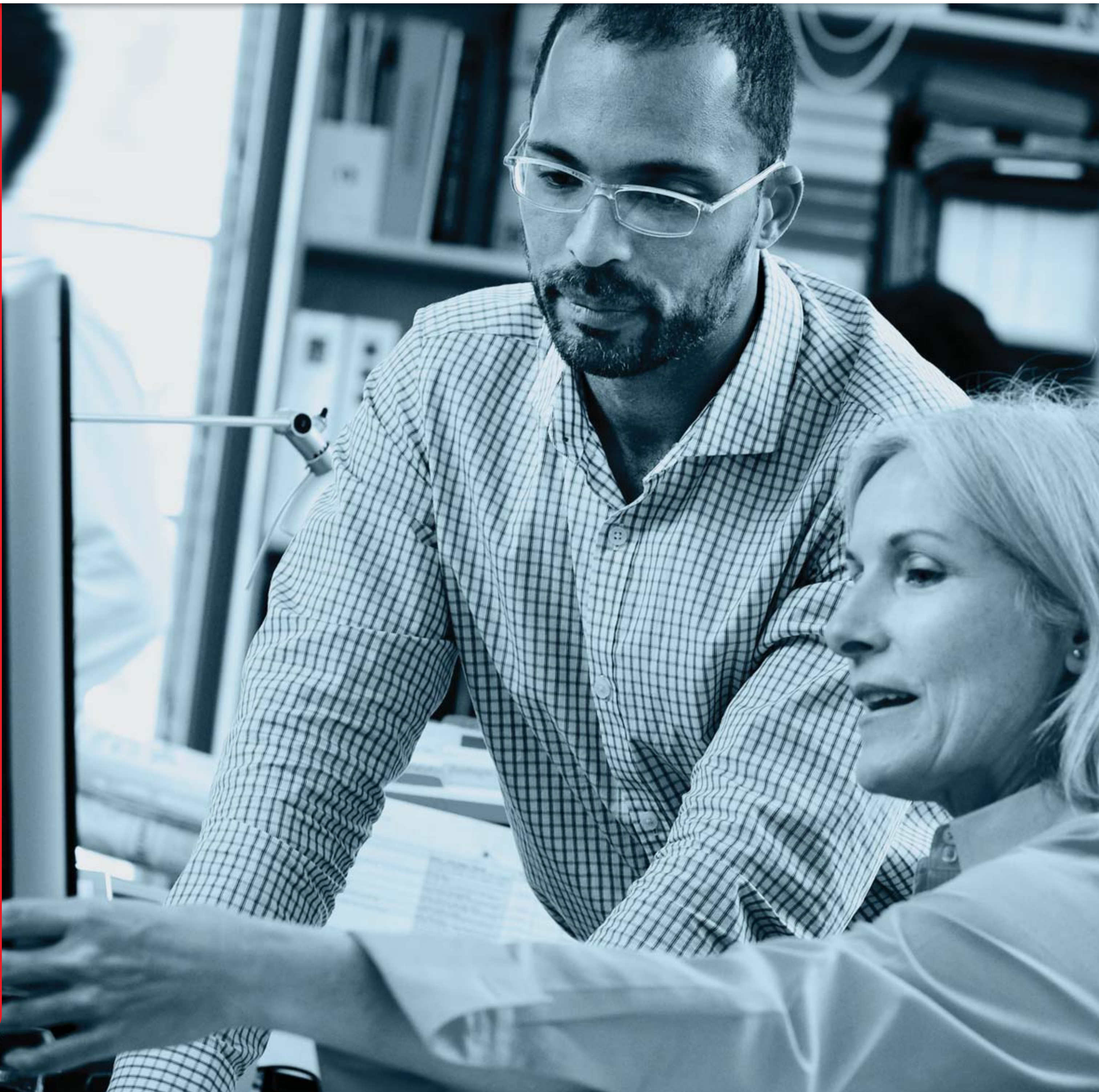
And it all comes together.

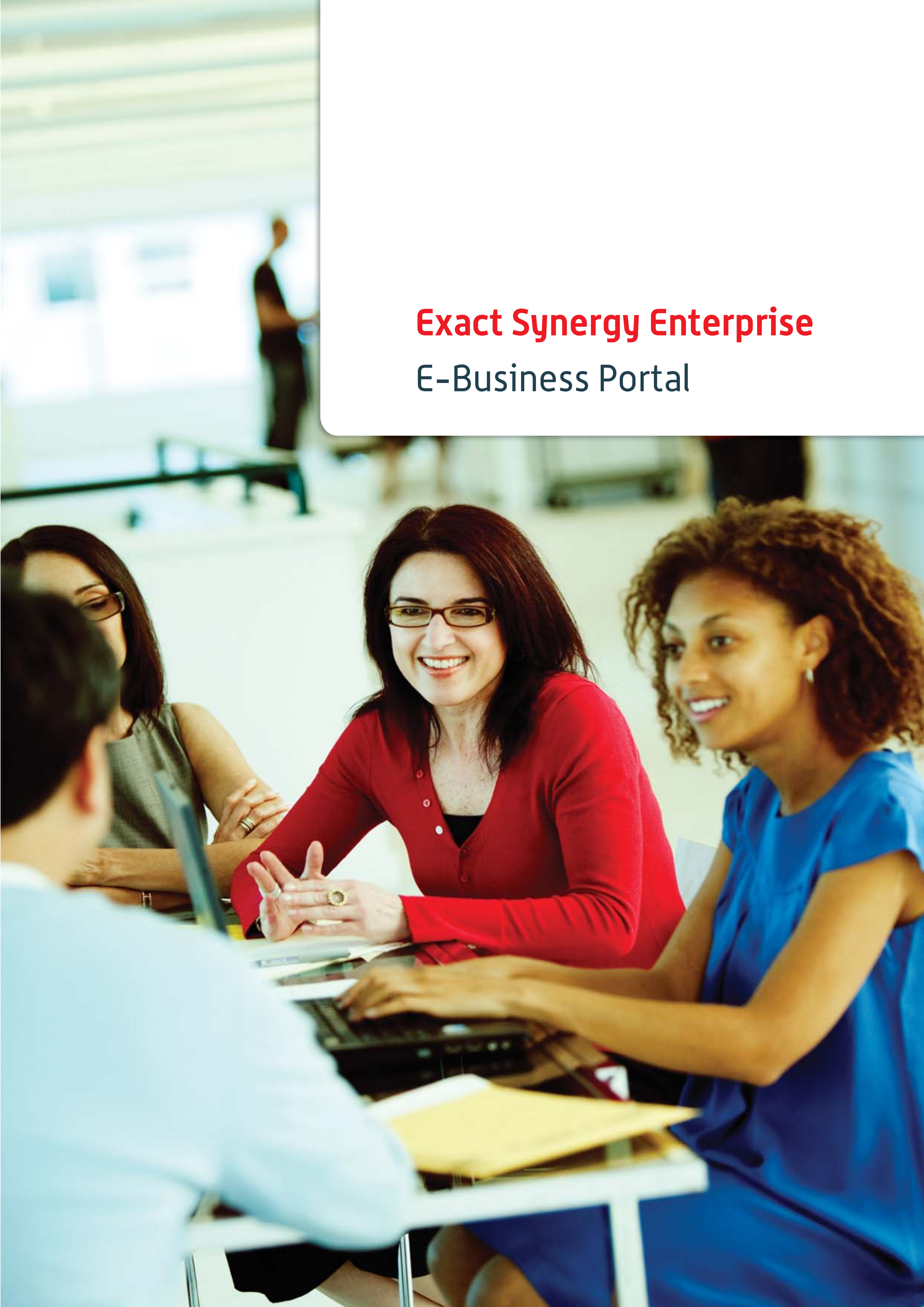
Exact Synergy Enterprise | E-Business Portal

User Guide



Exact Synergy Enterprise

E-Business Portal



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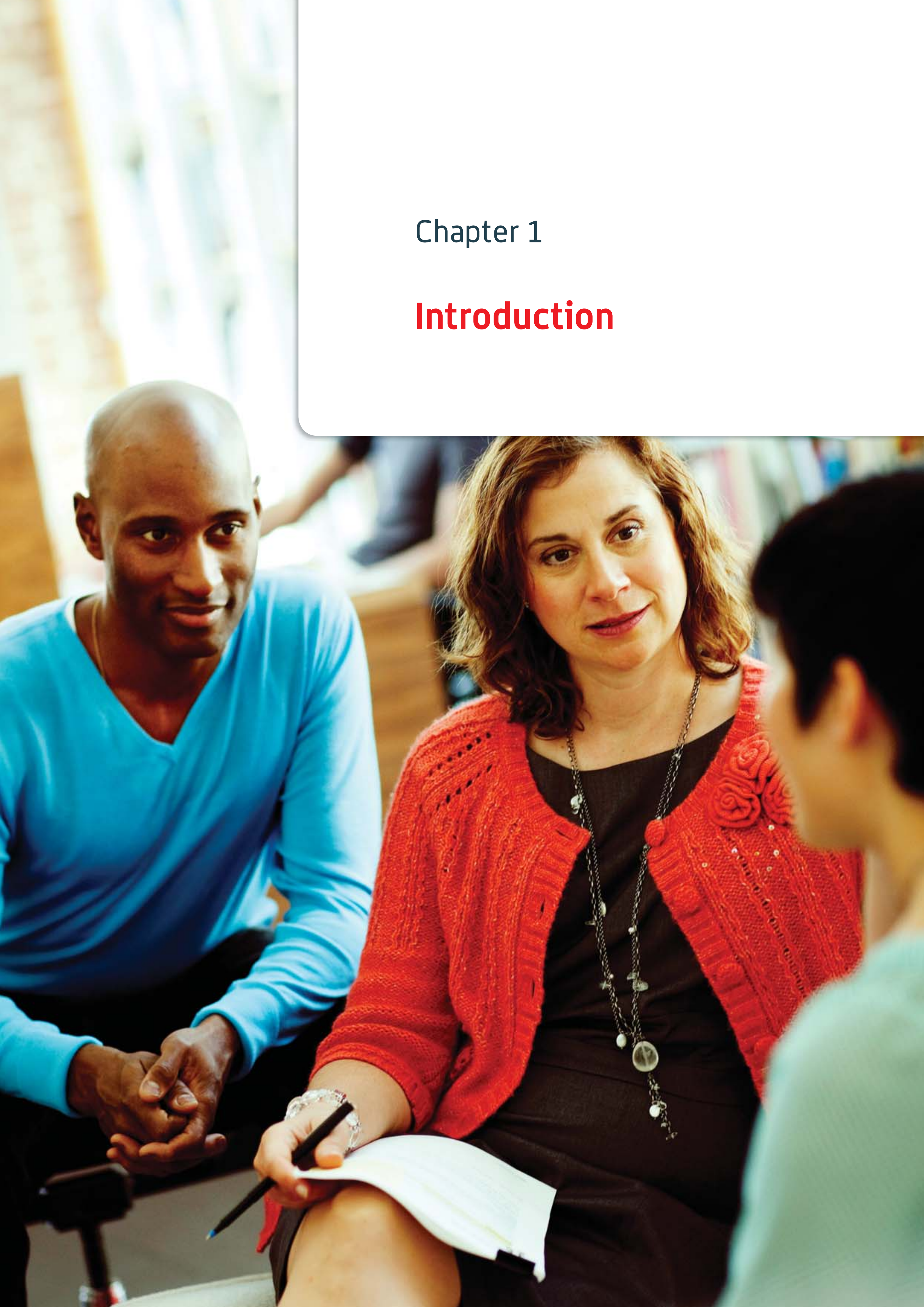
Chapter 1

Introduction



1. Introduction

Keeping your business partners within your supply chain by involving them in your company, such as allowing them to log on to a portal, provides them with a better service and makes your company more efficient.

With the E-Business portal, your business partners can check the information that your company has registered for them and they can change this information. You can also provide them with information about your company, such as products, service orders, and activities via the customer portal. Thus, you do not have to send newsletters via email. The communication with the customers can be stored in Exact Synergy Enterprise and made available in the portal so the other business partners can view the information.

You can also create a knowledge base whereby business partners can find information about your products. The portal can also be used to access your services and support team. Customers can view their contact information and update it. This will give you up-to-date information about your customers.

Exact Synergy Enterprise is designed for organizations with operations that have to be changed rapidly and be flexible. By providing information about people and processes in real-time, Exact Synergy Enterprise gives you the control and insight that you need to grow your business. There are many benefits that you can reap from this software, such as the following:

- Tighten your company's content and application interface into practical business processes.
- Allow user communities (such as customers, partners, and vendors) to access and act on the business transactions.
- Automate teamwork and collaboration.
- Provide business information in an intuitive format.
- Increase productivity by automating tasks.
- Standardize work environments with a secure 24-hour worldwide portal access.
- Construct unlimited portals based on the way your company operates. Complex web programming is not required.

Communication – everyone involved gets the right information at the right time

The Exact Synergy Enterprise single interface portal provides the information and tools to help your employees and business partners work efficiently. Instead of looking for data, Exact Synergy Enterprise shares information which can be used immediately. The integrated workflow and document management is automated, thus, errors are eliminated and time and money can be saved.

Collaboration – everyone is always in the loop

The business portal allows your company to interact with every facet of your business within the company and with the business partners of your company. Information that you want to share is always available online and linked to associated products, projects, or initiatives which allows you to do your work and share the information anytime from anywhere around the world.

Standardized individual portal environments

With the standard entry points, such as the one technology model that allows you to access anywhere and anytime, Exact Synergy Enterprise replaces the various tools that are required to accomplish document organization, tracking of activities for products, customers, associates, and vendors via business process management.

Knowledge sharing in real-time

Record management and document intelligence are easily available and visible to the employees, customers, vendors, and partners. This ensures that they will be fully informed on the happenings within your company. The Exact Synergy Enterprise portal also allows auditing, which will enhance your company's compliance requirements.

Role-based and security definitions

Roles can be customized to limit what employees and external resources can access. By defining individual or group roles, different people, departments, and companies can access only the information and functions of your company that are important and relevant to them.

Greater self-service and management

By putting existing assets, documents, and transactions in the customized process portals, Exact Synergy Enterprise functions based on the way your organization operates and how people think, by giving users access to the information and the ability to act on it. Thus, Exact Synergy Enterprise reduces the need for costly services or support, saving you both time and money.

Business information can be emails, notes, photographs, design documents, schedules, skill sets, budgets, forecasts, product specifications, safety sheets and certificates, manuals, financial statements, web content, legal documents, patents, business procedures, marketing materials, and others that your company uses to gain a competitive advantage in the marketplace.

Document creation, storage, and management

All the documents in Exact Synergy Enterprise include categories and type definitions that foster a more robust organization. Meeting notes, emails, product announcements, policies, education manuals, or supplier invoices can be categorized by the marketing, management, finance, or other departments of your company which makes it easier to find and act upon quickly.

Security definitions

Every Exact Synergy Enterprise document requires a security level for controlled accessibility. Thus, your information can be shared at various levels within the company, as well as externally at your discretion.

Consolidation without duplication

Once a document is scanned, uploaded, or entered into Exact Synergy Enterprise, it will be the only version that will be available for reference. This ensures that the identical information will be shared by those who view it. Multiple copies or versions will not be available. This simplifies cooperation amongst employees and speeds up decision making.

Website creation

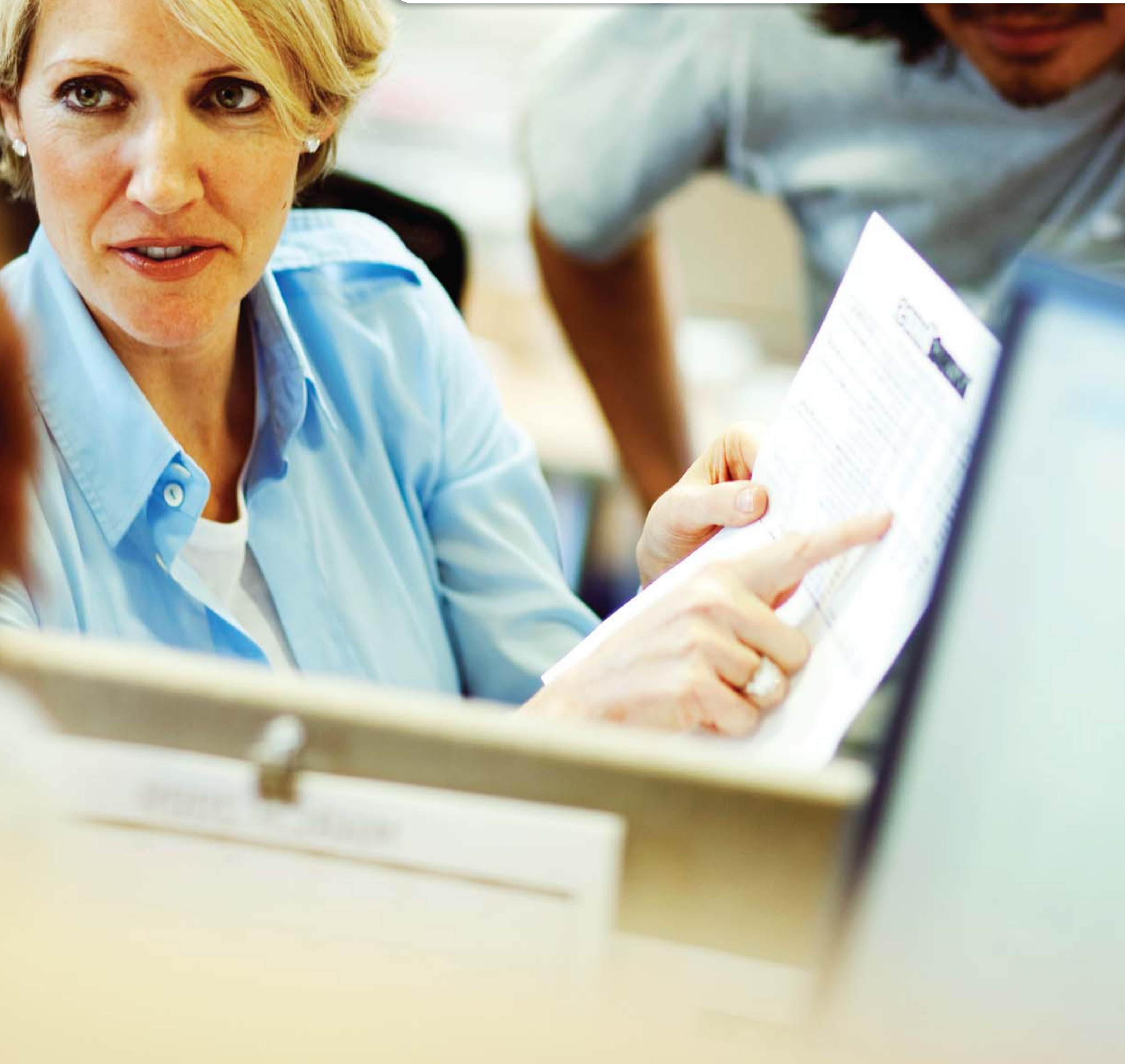
Exact Synergy Enterprise documents can be published when creating websites for specific users with contents, such as product and service information for clients, customer management, administration for sales representatives or company policies, and terms and conditions.

E-Commerce portal

By adding the option B2B E-Commerce portal, you can bring your portfolio to your stakeholders and optimize the order intake process (repetitive) of the B2B sales orders and B2B sales related activities. Existing and new customers can easily order online and gain access to up-to-date stock, pricing, and delivery information. Payments can be made via the account or with direct payment methods, such as credit or debit cards. These portals have a distinct look and feel with multi-language capabilities to ensure that you are able to reach your clients in their own language and with a targeted assortment catalog. This offers better service, reduces administrative hassle and errors, eliminates time consuming questions on the order status or pricing, and uses related time for alternative sales activities. You can even facilitate international or local partners and sales representatives in the field, and easily maintain the operations yourself.

Chapter 2

Customer Portal



2. Customer Portal

2.1 Introduction

The customer portal provides an easy, accessible way for your customers to stay informed about your company all the time via a central point of reference that provides everything they need to know in real time. Product specifications and enhancements, upcoming events, and special offers are some of the things customers can learn from the customer portal. The customer portal also allows customers to view their own customer file. In this file, they can see their address information and contact persons, customer number and account manager, contract specifics, previous and current calls and requests, and credit information.

The customers can also modify their company data themselves. For example, if a contact person changes, the customer can update his/her own customer file. This saves time and phone calls.

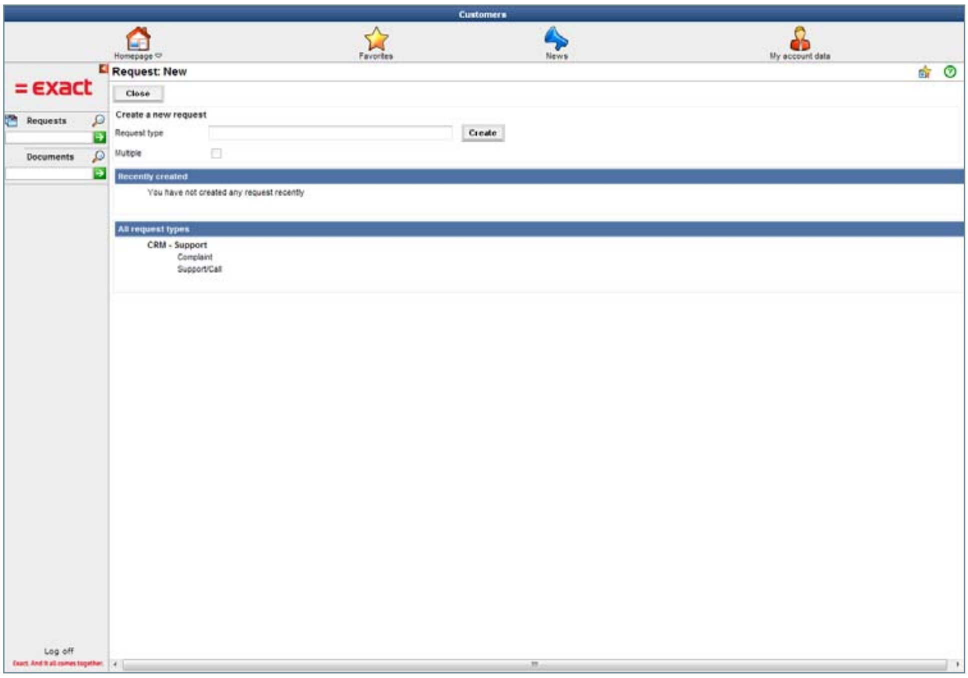
The customer portal facilitates standardized business process handling, such as customer inquiries or registrations and follow-ups for escalations or opportunities. This will lead to a more transparent and consistent process handling, which in turn, saves time directing calls. Apart from faxes, telephone calls, and emails to find the right person or address, the customer portal can be used to access your company. Together with the B2B E-Commerce portal, customers can review your product portfolio via a catalog, and order or review their status online.

2.2 Requests

The customer portal allows users to create, view, and search requests. There are various types of requests pre-defined in Exact Synergy Enterprise. For the customer portal, you can create requests such as a complaint and/or support call.

2.2.1 Creating requests

Requests such as **Complaint** and **Support/Call** can be created in the customer portal. Once you have submitted the request, the request will be available in the manager's workflow. The manager will have to **Realize** the request once the request is completed.



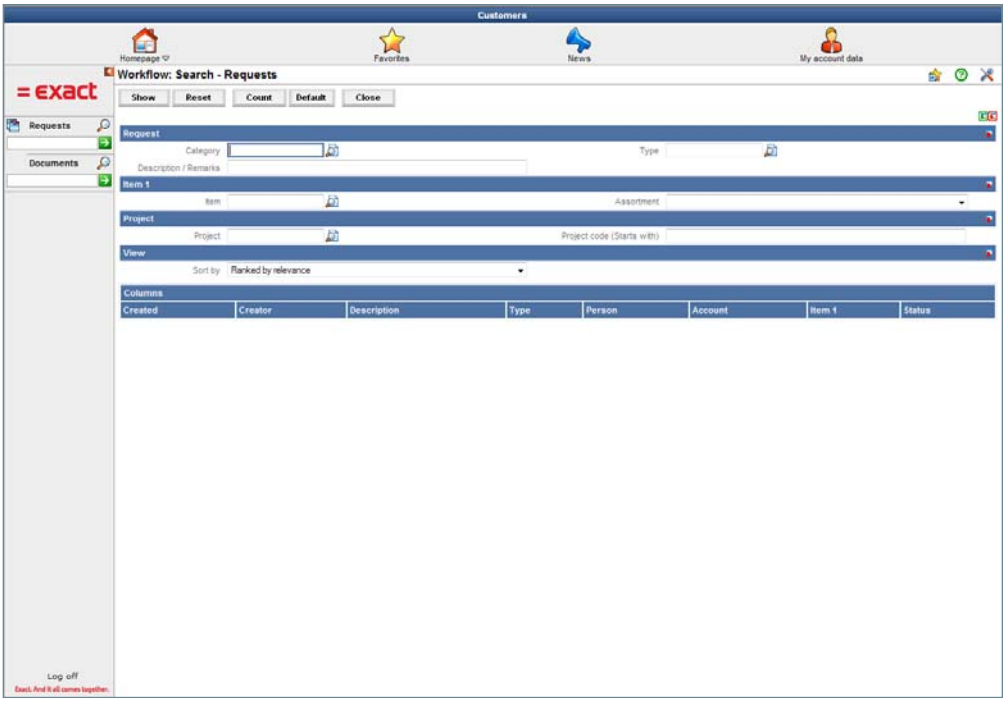
To create requests:

1. Click **New: Request** on the left menu.
2. Select the required request type under the **Recently created** or **All request types** section.
3. Define the fields.
4. Click **Submit**.

Note: All fields with the "**!**" icon are mandatory.

2.2.2 Searching and viewing requests

Once the request has been created, you can always view the request to check the status of the request to determine whether the request has been acted upon.



To search and view requests:

1. Click **Search: Requests** on the left menu.
2. Define the search criteria.
3. Click **Show**. The requests will be displayed.
4. Select the request that you want to view.
5. Click **Close** to exit.

2.2.3 Editing requests

Once the request has been created and submitted, you can still edit the request by adding or editing remarks in the request.

To edit requests:

1. Click **Search: Requests** at **Requests** on the left menu.
2. Define the search criteria.
3. Click **Show**. The requests will be displayed.
4. Select the request that you want to edit under the **Created** or **Description** column.
5. Make the necessary change(s).
6. Click **Save**.

2.2.4 Copying requests

If you want to create a request with similar information of another request, you can copy the request.

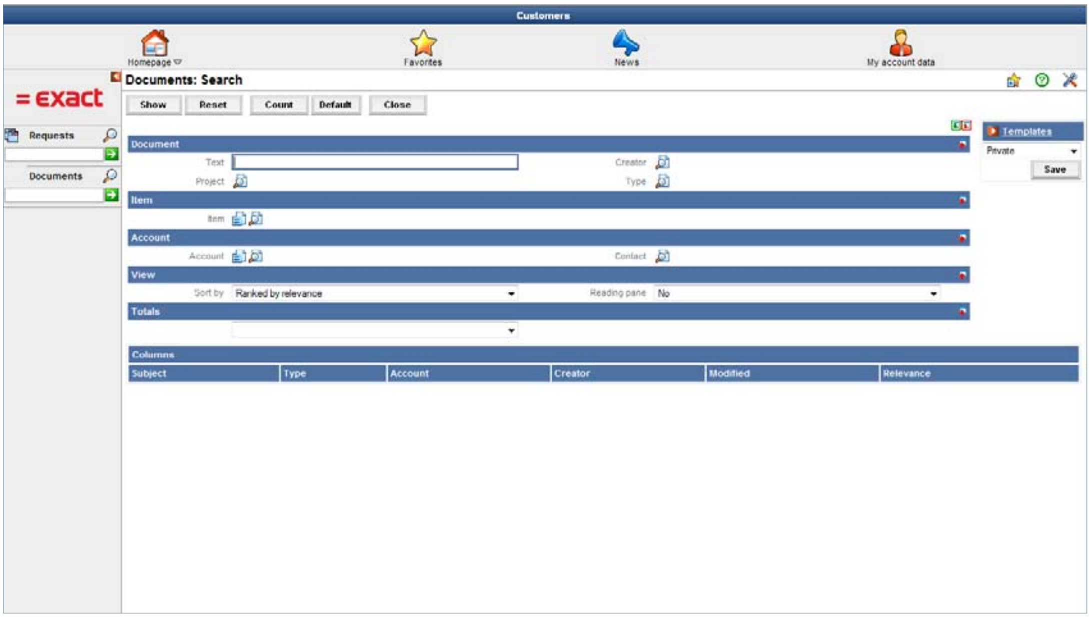
To copy requests:

1. Click **Search: Requests** at **Requests** on the left menu.
2. Define the search criteria.
3. Click **Show**. The requests will be displayed.
4. Select the request that you want to copy under the **Created** or **Description** column.
5. Click **Copy**. The **Request: New** page will be displayed.
6. Select a request type under the **Recently created** or **All request types** section. The information from the previous request will be displayed and selected. Clear the respective check boxes if you do not want the particular information to be copied to the new request.
7. Click **New**.
8. Define the fields.
9. Click **Submit**.

Note: All fields with the "**!**" icon are mandatory.

2.3 Searching and Viewing Documents

The customer portal allows you to search and view documents (with security levels set to **0** or **1**) created by the parent company. For more information, see 6.3 *Document Settings*.



To search and view documents:

1. Click **Search: Documents** on the left menu. The **Documents: Search** page will be displayed.
2. Define the search criteria.
3. Click **Show**. A list of documents will be displayed.
4. Select the document that you want to view under the **Subject** column.
5. Click **Close** to exit.

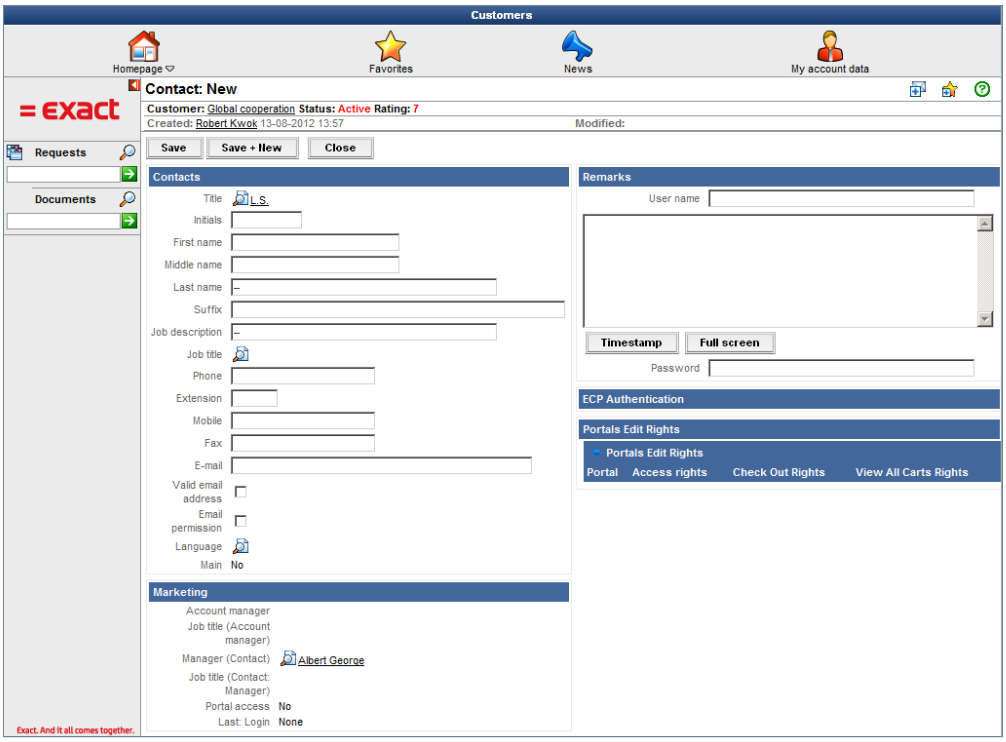
Note: You can also search for documents by clicking **My account data** on the top menu, and then clicking **Documents** under the **Monitor** section.

2.4 Contacts

The **Contacts** section on the account card allows you to create contacts, and view and modify existing contacts.

To create contacts:

1. Click **My account data** at the top menu.
2. On the account card under the **Contacts** section, click **Add**. The **Contact: New** page will be displayed.



3. Define the fields.
4. Click **Save** to save the new contact.
5. Click **Close** to exit.

To edit contacts:

1. Click **My account data** at the top menu.
2. On the account card under the **Contacts** section, select the required contact from the list of contacts.
3. Click **Edit**.
4. Make the necessary changes, and then click **Save**.
5. Click **Close** to exit.

To delete contacts:

1. Click **My account data** at the top menu.
2. Under the **Contacts** section, select the contact that you want to delete.
3. Click **Edit**.
4. Click **Delete**. A message requesting for confirmation to delete the contact will be displayed.
5. Click **OK**.

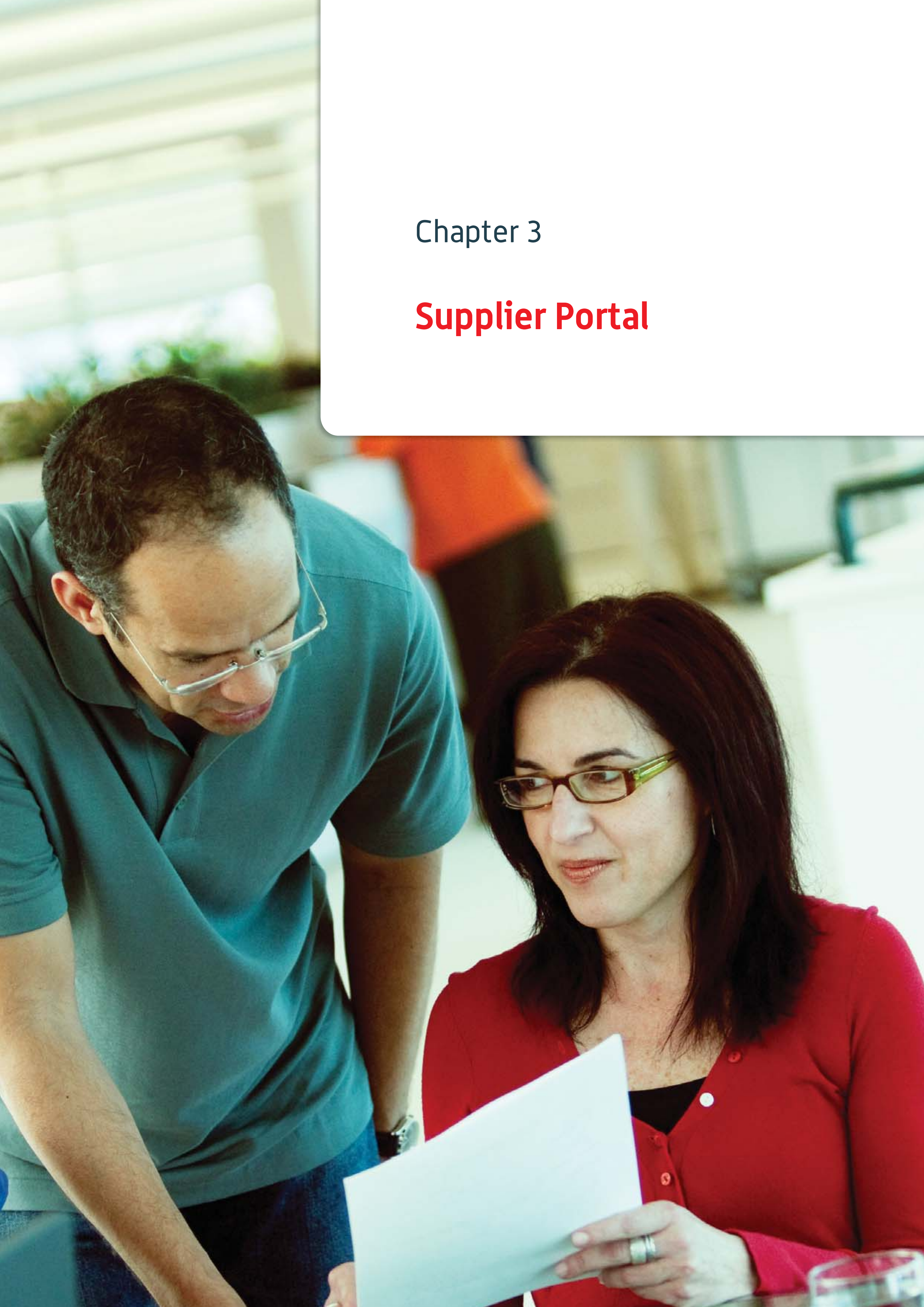
To upload vCards:

1. Click **My account data** at the top menu.
2. Under the **Contacts** section, select the contact to whom you want to upload the vCard file.
3. Click **Edit**.
4. Click **vCard** and click **Browse** to select and upload a vCard file.
5. Click **Submit**.
6. Click **Close** to exit.

To change statuses of contacts:

1. Click **My account data** at the top menu.
2. Under the **Contacts** section, select the contact whose status you want to change.
3. Click **Edit**.
4. Click **Inactive** to deactivate the selected contact. A message requesting for confirmation to change the status will be displayed.
5. Click **OK**.

Note: The **Inactive** button is only available if the current status of the contact is active. To activate inactive contacts, click **Active**.



Chapter 3

Supplier Portal

3. Supplier Portal

A supplier portal offers your suppliers the ability to integrate with your business, facilitate communication, and share information. A supplier portal can be used by accounts of type Supplier with an active status. Suppliers with the **Blocked** and **Inactive** statuses will not be able to use the supplier portal.

3.1 Contacts

3.1.1 Managing portal logins

Only the main contact person is able to give portal access to all the other contact persons linked to the account. The main contact person can activate the portal access option for the other contacts from his/her **My account data** card.

To activate the portal access option for the other contacts:

1. Click **Suppliers** at the top bar.
2. Go to Reports → My account data → My account data.
3. On the account card under the **Contacts** section, select the required contact.
4. On the **Contact** page, click **Edit**.
5. Under the **Marketing** section, select the **Portal access** check box.
6. Click **Save**.

You can set or reset your own portal login password from your contact card.

To set/reset own password for portal login:

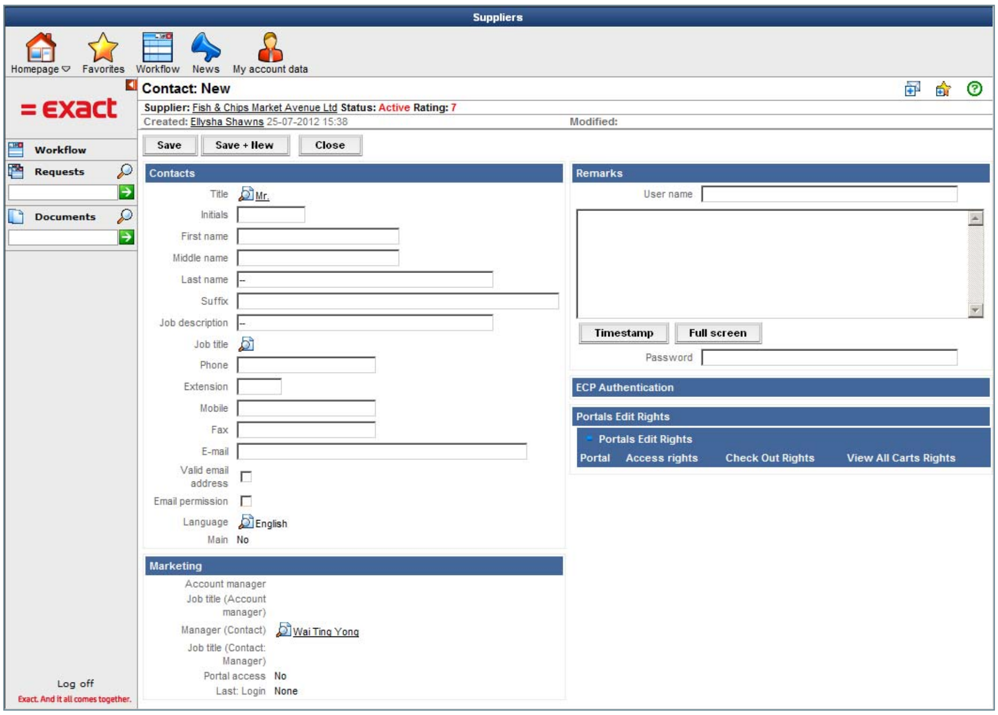
1. Click **My account data** at the top menu.
2. On the account card under the **Contacts** section, select your own name.
3. On the **Contact** page, click **Password**.
4. Define the fields.
5. Click **Save**.

3.1.2 Managing contacts under accounts

The **Contacts** section on the account card allows you to create contacts, and view and modify existing contacts.

To create contacts:

1. Click **My account data** at the top menu.
2. On the account card under the **Contacts** section, click **Add**. The **Contact: New** page will be displayed.



3. Define the fields.
4. Click **Save** to save the new contact.
5. Click **Close** to exit.

To edit contacts:

1. Click **My account data** at the top menu.
2. On the account card under the **Contacts** section, select the required contact from the list of contacts.
3. Click **Edit**.
4. Make the necessary changes, and then click **Save.**
5. Click **Close** to exit.

To delete contacts:

1. Click **My account data** at the top menu.
2. Under the **Contacts** section, select the contact that you want to delete.
3. Click **Edit.**
4. Click **Delete**. A message requesting for confirmation to delete the contact will be displayed.
5. Click **OK**.

To upload vCards:

1. Click **My account data** at the top menu.
2. Under the **Contacts** section, select the contact to whom you want to upload the vCard file.
3. Click **Edit**.
4. Click **vCard** and click **Browse** to select and upload a vCard file.
5. Click **Submit**.
6. Click **Close** to exit.

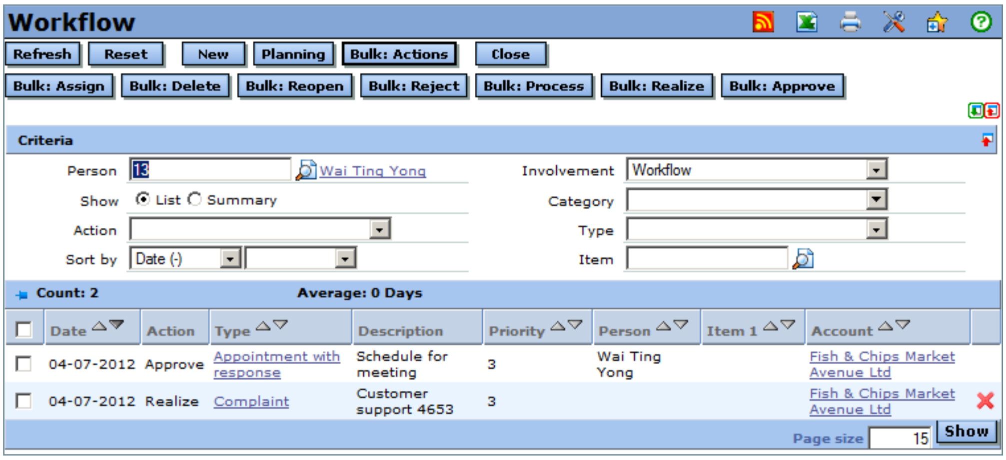
To change statuses of contacts:

1. Click **My account data** at the top menu.
2. Under the **Contacts** section, select the contact whose status you want to change.
3. Click **Edit**.
4. Click **Inactive** to deactivate the selected contact. A message requesting for confirmation to change the status will be displayed.
5. Click **OK**.

Note: The **Inactive** button is only available if the current status of the contact is active. To activate inactive contacts, click **Active**.

3.2 Workflow

As a supplier, you can manage requests in your workflow via **Workflow** on the top menu or left menu. On the **Workflow** page, you can view requests that are waiting for your actions, create requests, as well as perform bulk actions on those requests.



3.2.1 Creating requests

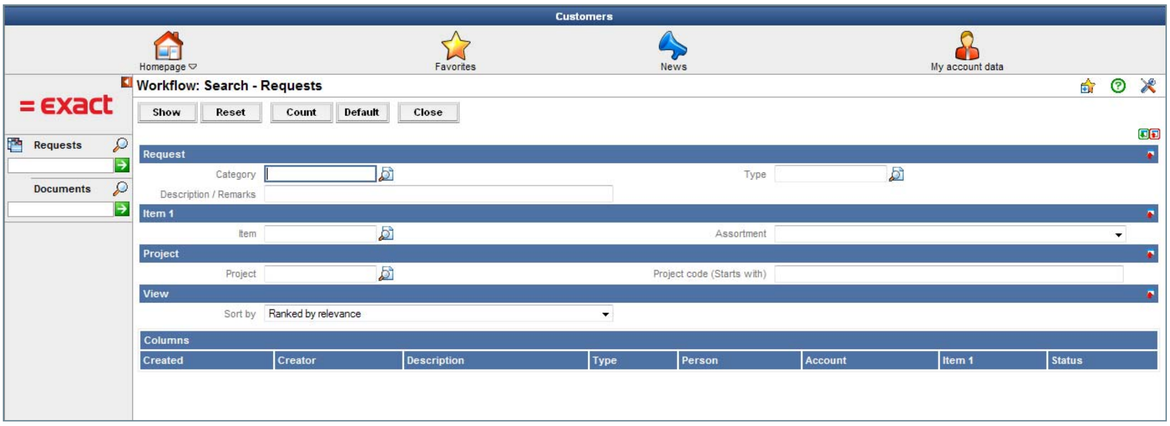
As a supplier, you can only create a request that is tied to a request type with security level **0**, **1**, or **2**.
To create requests:

1. Click **Workflow** on the top or left menu.
2. Click **New**.
3. Select the required request type under the **Recently created** or **All request types** section.
4. Define the fields.
5. Click **Submit**.

Note: You can also create requests by clicking **My account data** on the top menu, and then clicking **Workflow** under the **Monitor** section.

3.2.2 Searching and viewing requests

Once the request has been created, you can always view the request to check the status of the request to determine whether the request has been acted upon.



To search and view requests:

1. Click **Search: Requests** on the left menu.
2. **Define** the search criteria.
3. Click **Show**. The requests will be displayed.
4. Select the request that you want to view.
5. Click **Close** to exit.

3.2.3 Editing requests

Once the request has been created and submitted, you can still edit the request by adding or editing remarks in the request.

To edit requests:

1. Click **Search: Requests** at **Requests** on the left menu.
2. Define the search criteria.
3. Click **Show**. The requests will be displayed.
4. Select the request that you want to edit under the **Created** or **Description** column.
5. Make the necessary change(s).
6. Click **Save**.

3.2.4 Copying requests

If you want to create a request with similar information of another request, you can copy the request.

To copy requests:

1. Click **Search: Requests** at **Requests** on the left menu.
2. Define the search criteria.
3. Click **Show**. The requests will be displayed.
4. Select the request that you want to copy under the **Created** or **Description** column.
5. Click **Copy**. The **Request: New** page will be displayed.
6. Select a request type under the **Recently created or All request types** section. The information from the previous request will be displayed and selected. Clear the respective check boxes if you do not want the particular information to be copied to the new request.
7. Click **New**.
8. Define the fields.
9. Click **Submit**.

Note: All fields with the "**!**" icon are mandatory.

3.2.5 Performing bulk actions on requests

You can perform bulk operations on more than one request in your workflow. When you click the **Bulk: Actions** button, several other buttons become available. These buttons allows you to perform actions on up to 25 requests at once.

To perform bulk actions on requests:

1. Click **Workflow** on the top or left menu.
2. Click **Bulk: Actions**. Seven additional buttons will be displayed, allowing you to assign, delete, reopen, reject, process, realize, or approve requests in bulk.
3. Select the check boxes next to the requests to indicate the requests involved in the bulk operation.
4. Click **Bulk: Assign**, **Bulk: Delete**, **Bulk: Reopen**, **Bulk: Reject**, **Bulk: Process**, **Bulk: Realize**, or **Bulk: Approve**. Depending on the bulk operation, the system may prompt you for more information or confirmation. Once the bulk operation is completed, the system will display a report on the success or failure of the operation on each request.
5. Click **Close** on the report page to display the workflow list.

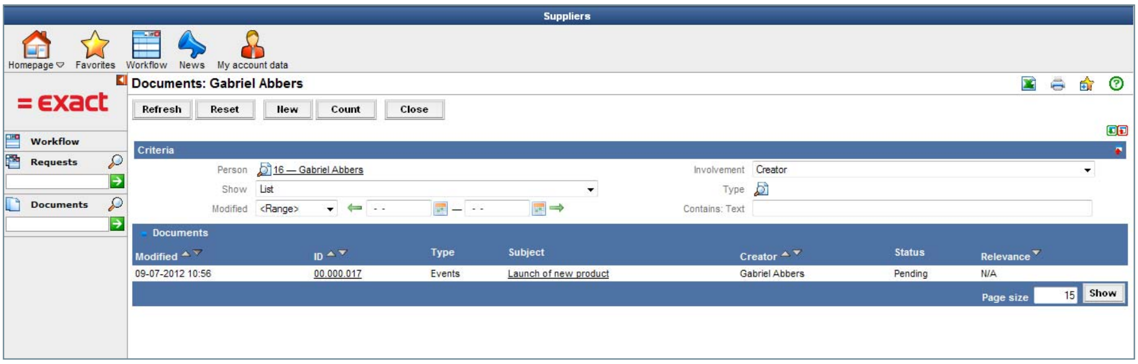
During the bulk operation, the system will automatically add a timestamp at the end of the **Remarks: Workflow** field of each of the selected requests. If the **Remarks: Workflow** field is not available or cannot be edited at the current request status, the timestamp will be added at the end of the **Remarks: Request** field. If both fields are not available or cannot be edited at the current request status, or the operation is **Bulk: Delete**, the timestamp will not be added.

3.3 Creating, Searching, and Viewing Documents

The supplier portal allows you to create documents, and search and view existing documents. For more information, see *6.3 Document Settings*.

You will require certain rights in order to perform these actions. See the following table for the actions and respective rights:

Actions	Rights required
Create documents	You can only create documents with the following security levels: – **2 — Partners** – **10 — Internal** – **101 — Project (Specific)**
Edit documents	You can only modify the following documents: – Documents that you have created. – Documents with **Creator / Owner** selected at the **Edit: Rights** field and your name is filled in the **Owner** field.
View and search for documents	You can view and search for the following documents: – Documents that you have created. – Documents with security level set to **0**, **1**, and **2**. – Documents linked to a project that has its security level set to **2**.



To create documents:

1. Click **New: Document** on the left menu. The **Document: New** page will be displayed.
2. Select a document type under the **Select: Document type** section.
3. Define the fields.
4. Click **Save**.

> **Note:** All fields with the "**!**" icon are mandatory.

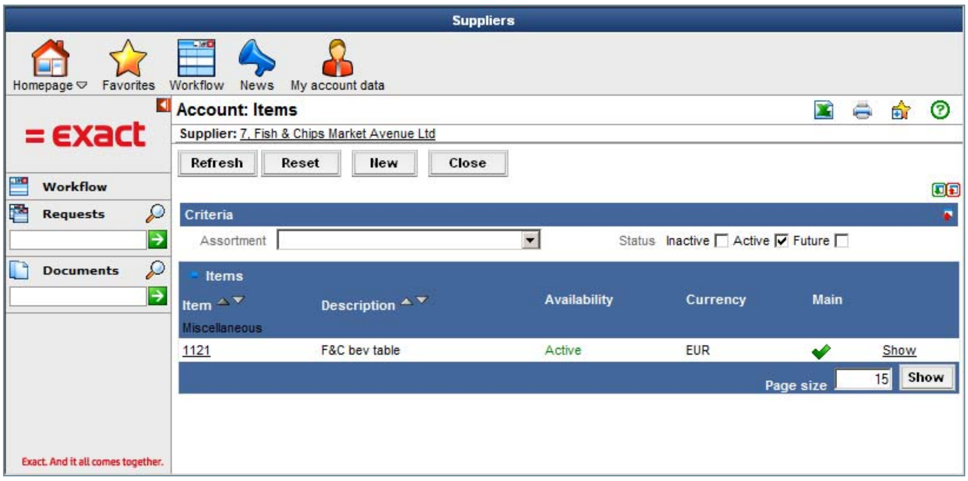
To search and view documents:

1. Click **Search: Documents** on the left menu. The **Documents: Search** page will be displayed.
2. Define the search criteria.
3. Click **Show**. A list of documents will be displayed.
4. Select the document that you want to view under the **Subject** column.
5. Click **Close** to exit.

Note: You can also search for documents by clicking **My account data** on the top menu, and then clicking **Documents** under the **Monitor** section.

3.4 Searching and Viewing Items

As a supplier, you can search for and view items that are related to your account.



To search and view items:

1. Click **Suppliers** at the top bar.
2. Go to Reports → General → Items.
3. Under the **Criteria** section at **Assortment**, select an assortment to display items belonging to the assortment in the results.
4. At **Status**, select the **Inactive**, **Active**, or **Future** check box(es) to display items with the status(es).
5. Click **Refresh**.

3.5 Resellers Forums

You can access forum to view or share topics of interest. This feature provides you with a platform to communicate with other users of Exact Synergy Enterprise.

To view threads:

1. Click **Suppliers** at the top bar.
2. Go to Reports → General → Resellers - Forum.
3. Click the hyperlinks on the left to view the respective topics.
4. Click the hyperlink under the **Topics** column.

To create threads:

1. Click **Suppliers** at the top bar.
2. Go to Reports → General → Resellers - Forum.
3. Click the hyperlink of a forum.
4. Click the hyperlink of a subtopic under the **Topics** column.
5. Click the **Begin new conversation** hyperlink.
6. Type the subject of the thread.
7. After filling in other relevant information, click **Post**.

3.6 Tests

You can obtain an overview of planning requests for tests. When you receive a planning request, you can execute the test within the start and end dates and time indicated in the planning request. If you have deleted the planning request before executing it, a request must be recreated before you can execute it.

When you execute a test, a page introducing the test will be loaded. Each question will be displayed on a separate page. The answers selected will be stored in answer requests so that the full reporting capabilities in Exact Synergy Enterprise can be utilized to analyze the results.

You can also obtain an overview of scores that you have obtained in tests.

To execute tests:

1. Click **Suppliers** at the top bar.
2. Go to Reports → Tests → Execute.
3. Under the **Test** column, click the hyperlinked description of the test. A page with the introduction of the test will be displayed.
4. Click **Start** to begin the test. You can click **Next** to go to the following question, or **Previous** to return to the previous question.
5. Click **Finish** to complete the test. You cannot change the answers once the test is completed.

Tip: For questions that you have not answered or need to be reviewed later on, you can mark them by selecting the **Review** check box. While executing the test, you can click the **Review** button to view the questions that you have marked.

To view test scores:

1. Click **Suppliers** at the top bar.
2. Go to Reports → Tests → Scores.
3. Define the criteria under the **Criteria** section.
4. Click **Show**.

3.7 Sales Orders and Fulfillments

As a supplier, you can search for and view quotation and sales order records belonging to your account.

To view invoiced sales orders:

1. Click **Suppliers** at the top bar.
2. Go to Reports → Orders → Quotations / Sales orders.
3. Under the **Criteria** section at **Date**, define a date or a range of dates to display sales orders or credit notes created on the selected date(s).
4. At **Currency**, select the currency to display sales orders or credit notes created with the defined currency.
5. Click **Show**.

Note: This feature only displays sales order and credit note records that have been invoiced and belong to the account displayed at **Reseller**.

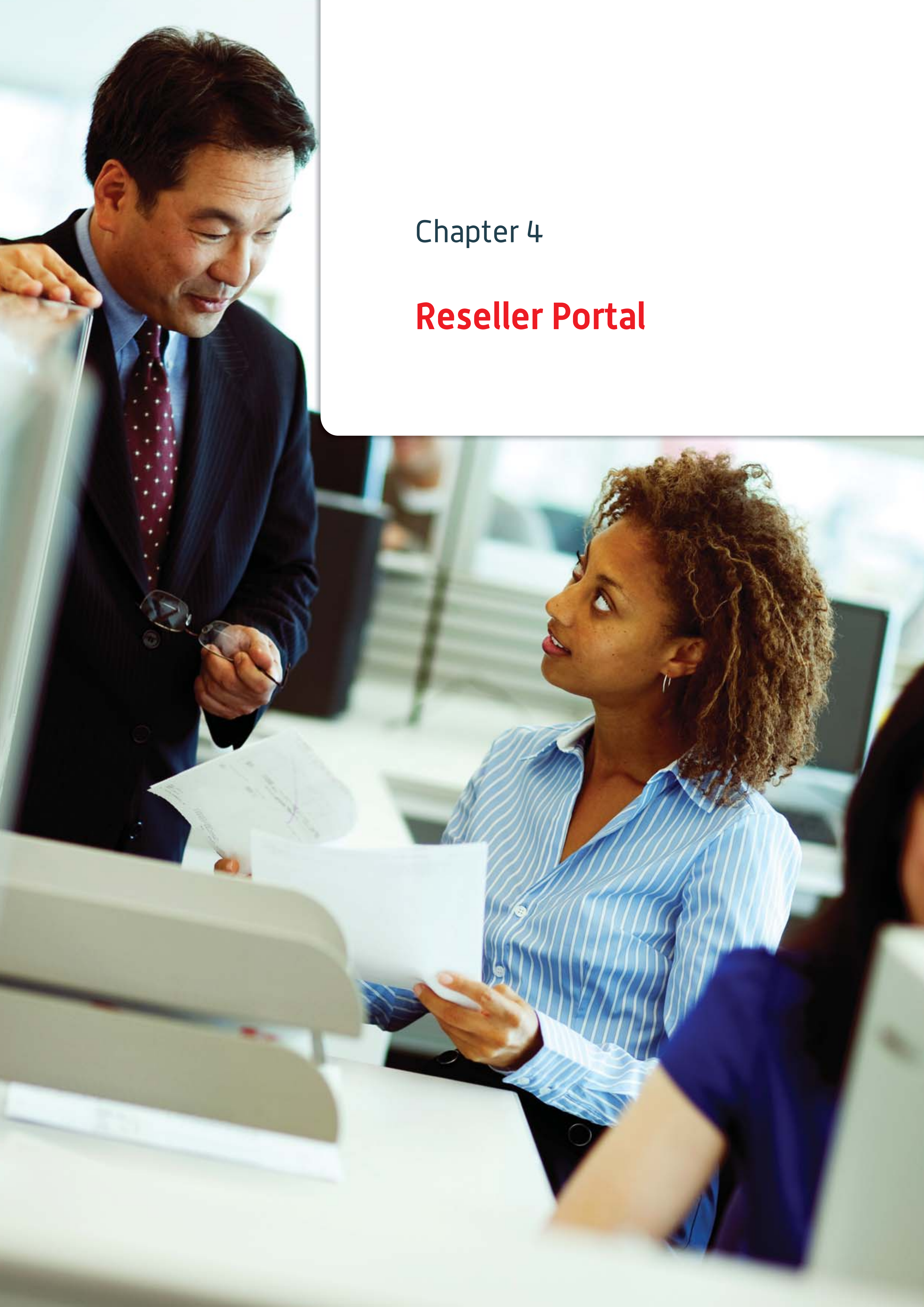
To view all sales orders:

1. Click **Suppliers** at the top bar.
2. Go to Reports → Orders → Fulfillment.
3. Under the **Criteria** section at **Account**, type or select an account to view the sales orders belonging to the selected account.
4. Click **Show**.

Note: This feature displays sales order and credit note records that have or have not been invoiced and belong to the account defined at **Account**.

Chapter 4

Reseller Portal



4. Reseller Portal

Exact Synergy Enterprise empowers you with a greater tool to participate in your reseller-related business processes and manage business relationships with your customers via the reseller portal. Using this portal, resellers reap many benefits, such as:

– Manage business related matters more efficiently and systematically, yet in a unique manner with a personal touch.
– Access documents, news, and specifications.
– Create requests that initiate workflows for a proper follow-up.
– Add a personalized touch to business relationships by getting involved in the workflows and checking customer-related data.

In addition, e-learning programs can be easily set up and distributed among your reseller channels. With the Exact Synergy Enterprise reseller portal, resellers can represent your company and your business propositions in more professional and compliant way.

4.1 Managing Portal Logins

Upon activation of the portal access for the main contact person of the account, the main contact person can activate the portal access option for all the other contacts linked to the account via the **Contact** section in **My account data** card.

To activate the portal access option for the other contacts:

1. Click **Customers** at the top bar.
2. Go to Reports → My account data → My account data.
3. On the account card under the **Contacts** section, select the required contact.
4. On the **Contact** page, click **Edit**.
5. Under the **Marketing** section, select the **Portal access** check box.
6. Click **Save**.

Note: To allow the main contact person of the reseller to have web access, function right **121 – Allows to give web access to main contact person of reseller** is required. Users with the **Customer manager** or **Reseller manager** role have this function right.

You can change your own portal login password from your contact card.

To change own password for portal login:

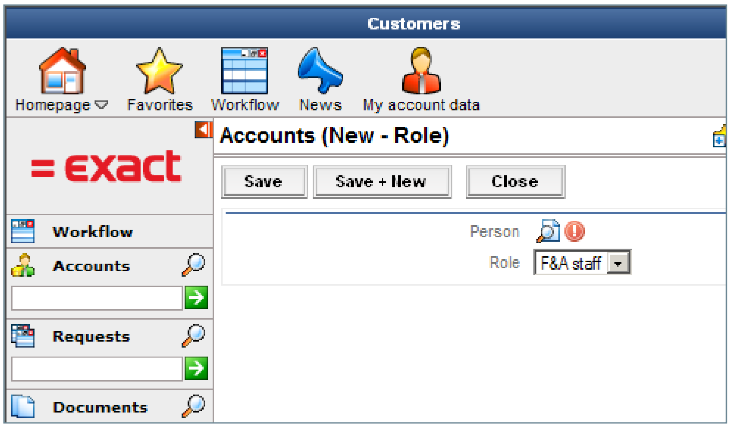
1. Click **My account data at the top menu.**
2. On the account card under the **Contacts** section, select your own name.
3. On the **Contact** page, click **Password**.
4. Define the fields.
5. Click **Save**.

4.2 Assigning Role to Contact People

As the main contact of the reseller account, you can assign the **F&A staff** role for or remove the **F&A staff** role from other contacts belonging to the same account.

To assign role to contact people:

1. Click **Customers** at the top bar.
2. Go to Reports → My account data → My account data.
3. On the account card under the **Contacts** section, click **Security**. The **Accounts: Role** page will be displayed.
4. Click **New**. You will see the following page:

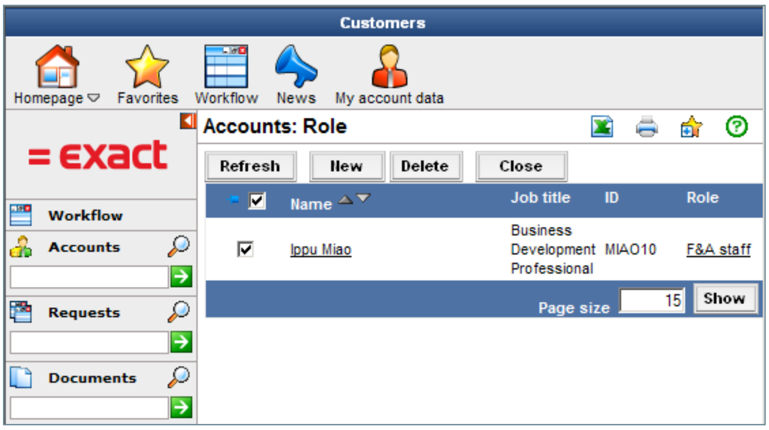


5. On the **Accounts (New – Role)** page at **Person**, type or select the ID of the person for whom you want to assign the role to.
6. At **Role**, **F&A staff** is selected by default.
7. Click **Save.**

Note: All fields with the "**!**" icon are mandatory.

To delete role from contact people:

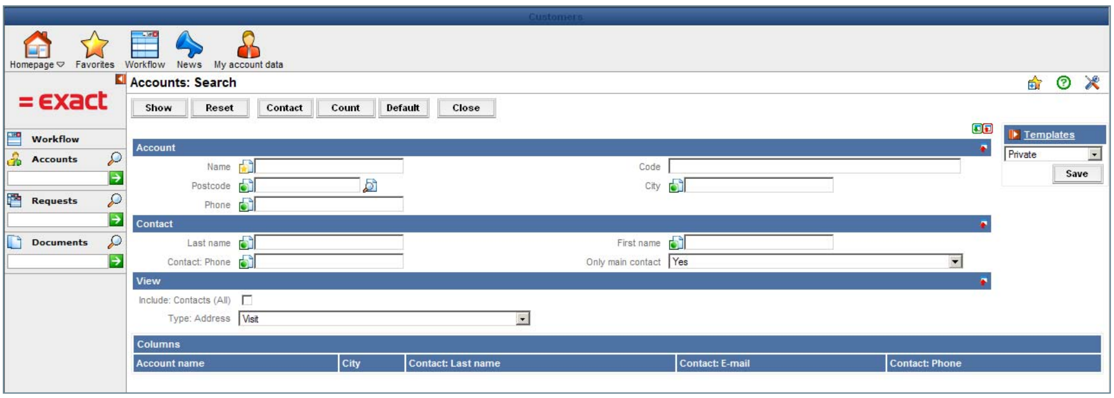
1. Click **Customers** at the top bar.
2. Go to Reports → My account data → My account data.
3. On the account card under the **Contacts** section, click **Security**.
4. On the **Accounts: Role** page, select the check box(es) of the contacts for whom you want to remove the **F&A staff** role, as displayed in the following page:



5. Click **Delete.** A message requesting for confirmation to remove the role will be displayed.
6. Click **OK.**

4.3 Managing Accounts

On the account card, you can view and modify information of the accounts as well as manage the contacts in accounts.



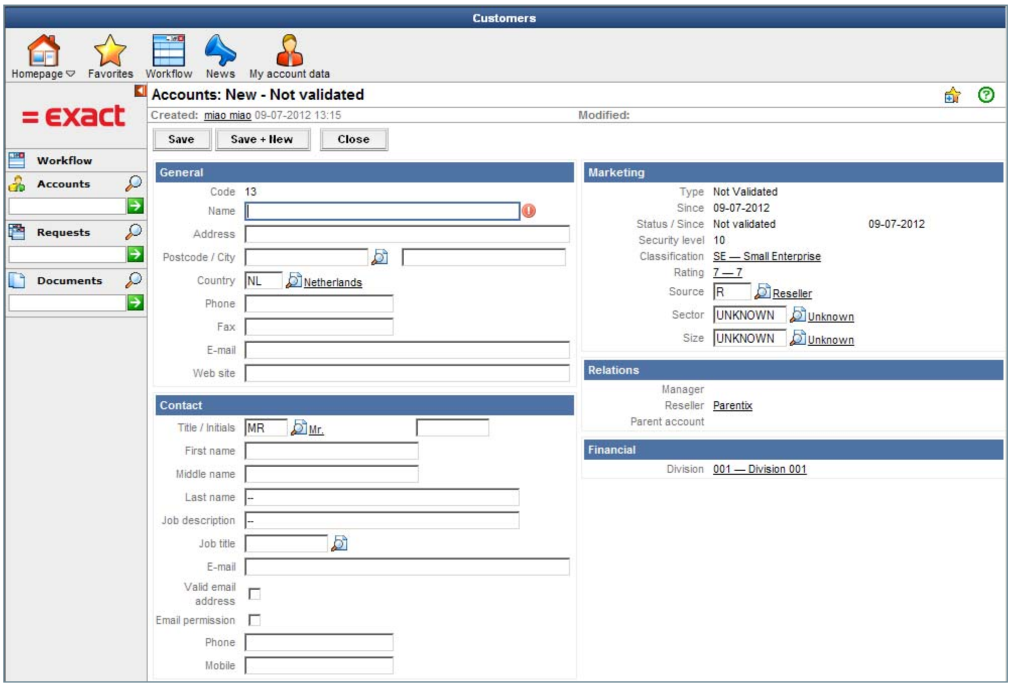
To search and view accounts:

1. Click **Search: Accounts** on the left menu. The **Accounts: Search** page will be displayed.
2. Define the search criteria.
3. Click **Show**. A list of accounts will be displayed.
4. Select the account that you want to view under the **Account name** column.
5. Click **Close** to exit.

> **Note:** You can also search or view accounts if you have clicked **Accounts** on the left menu. On the **Accounts** page, select an account type under its category. The **Accounts: Search** page will be displayed.

To create accounts:

1. Click **New: Account** on the left menu. The **Select: Type** page will be displayed.
2. Under the **Type: Company** section, click **Not validated.** The **Accounts: New – Not validated** page will be displayed.



4. Define the fields.
5. Click **Save** to save the new account.
6. Click **Close** to exit.

> **Note:** All fields with the "**!**" icon are mandatory.

To edit accounts:

1. Click **Customers** at the top bar.
2. Go to Reports → Accounts → Search.
3. On the **Search** page under the **Search** section, click **Accounts**.
4. On the **Accounts: Search** page, define the search criteria, and then click **Show**.
5. Select the required account under the **Account name** column.
6. Click **Edit**.
7. Make the necessary changes, and then click **Save**.
8. Click **Close** to exit.

To delete accounts:

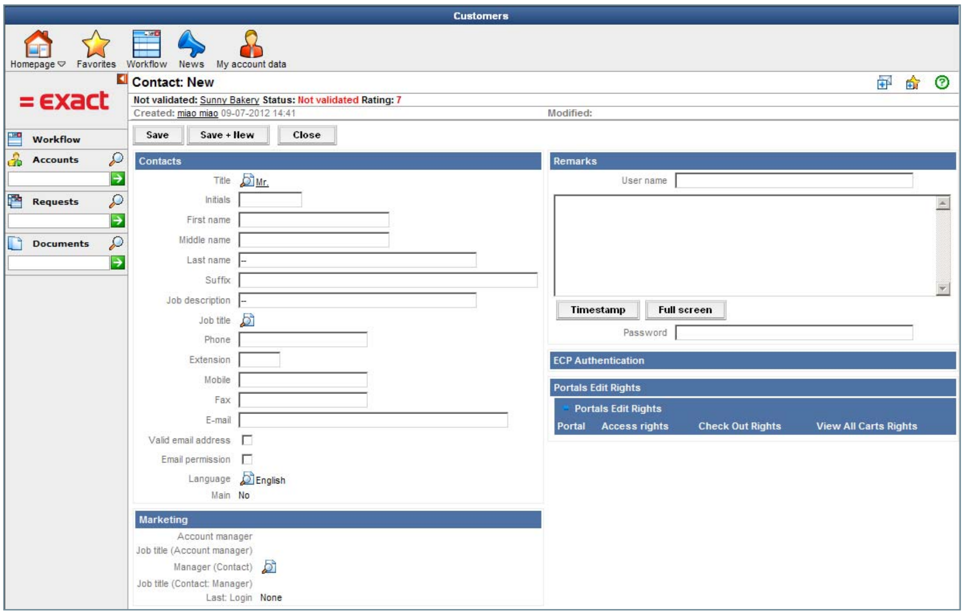
1. Click **Customers** at the top bar.
2. Go to Reports → Accounts → Search.
3. On the **Search** page under the **Search** section, click **Accounts**.
4. On the **Accounts: Search** page, define the search criteria, and then click **Show**.
5. Select the required account under the **Account** name column.
6. Click **Edit**.
7. Click **Delete**. A message requesting for confirmation to delete the account will be displayed.
8. Click **OK** to delete the account.

4.3.1 Managing contacts under accounts

The **Contacts** section on the account card allows you to search, create, and modify existing contacts. Furthermore, you can assign new account roles to contacts for portal rights via **My account data**. For more information, see *4.2 Assigning Role to Contact People.*

To create contacts:

1. Click **Customers** at the top bar.
2. Go to Reports → Accounts → Search.
3. On the **Search** page under the **Search** section, click **Accounts**.
4. On the **Accounts: Search** page, define the search criteria, and then click **Show**.
5. Select the required account under the **Account name** column.
6. On the account card under the **Contacts** section, click **Add**. The **Contact: New** page will be displayed.



7. Define the fields.
8. Click **Save** to save the new contact.
9. Click **Close** to exit.

To edit contacts:

1. Click **Customers** at the top bar.
2. Go to Reports → Accounts → Search.
3. On the **Search** page under the **Search** section, click **Accounts**.
4. On the **Accounts: Search** page, define the search criteria, and then click **Show**.
5. Select the required account under the **Account name** column.
6. On the account card under the **Contacts** section, select the required contact from the list of contacts.
7. Click **Edit**.
8. Make the necessary changes, and then click **Save**.
9. Click **Close** to exit.

To delete contacts:

1. Click **Customers** at the top bar.
2. Go to Reports → Accounts → Search.
3. On the **Search** page under the **Search** section, click **Accounts**.
4. On the **Accounts: Search** page, define the search criteria, and then click **Show**.
5. Select the required account under the **Account name** column.
6. Under the **Contacts** section, select the contact that you want to delete.
7. Click **Edit**.
8. Click **Delete**. A message requesting for confirmation to delete the contact will be displayed.
9. Click **OK**.

To upload vCards:

1. Click **Customers** at the top bar.
2. Go to Reports → Accounts → Search.
3. On the **Search** page under the **Search** section, click **Accounts**.
4. On the **Accounts: Search** page, define the search criteria, and then click **Show**.
5. Select the required account under the **Account name** column.
6. Under the **Contacts** section, select the contact to whom you want to upload the vCard file.
7. Click **Edit**.
8. Click **vCard** and click **Browse** to select and upload a vCard file.
9. Click **Submit**.
10. Click **Close** to exit.

To change statuses of contacts:

1. Click **Customers** at the top bar.
2. Go to Reports → Accounts → Search.
3. On the **Search** page under the **Search** section, click **Accounts**.
4. On the **Accounts: Search** page, define the search criteria, and then click **Show**.
5. Select the required account under the **Account name** column.
6. Under the **Contacts** section, select the contact whose status you want to change.

7. Click **Edit**.
8. Click **Inactive** to deactivate the selected contact. A message requesting for confirmation to change the status will be displayed.
9. Click **OK**.

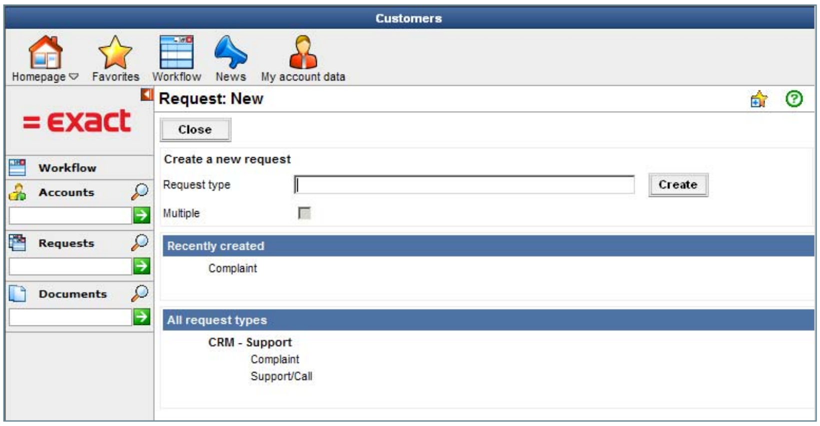
Note: The **Inactive** button is only available if the current status of the contact is active. To activate inactive contacts, click **Active**.

4.3.2 Managing requests under accounts

Requests can be created or modified depending on the settings configured in the **Flow** tab of the request type definition. Whether certain information is visible or can be edited in a request form depends on the status of the request and the definition of each field configured in the **Fields** tab of the request type definition. The actions that can be performed on a request depend on the request status and the request type definition.

To create requests:

1. Click **Customers** at the top bar.
2. Go to Reports → Accounts → Search.
3. On the **Search** page under the **Search** section, click **Accounts**.
4. On the **Accounts: Search** page, define the search criteria, and then click **Show**.
5. Select the required account under the **Account name** column.
6. On the account card under the **Contacts** section, select the required contact from the list of contacts.
7. Click **New: Request**. The **Request: New** page will be displayed.



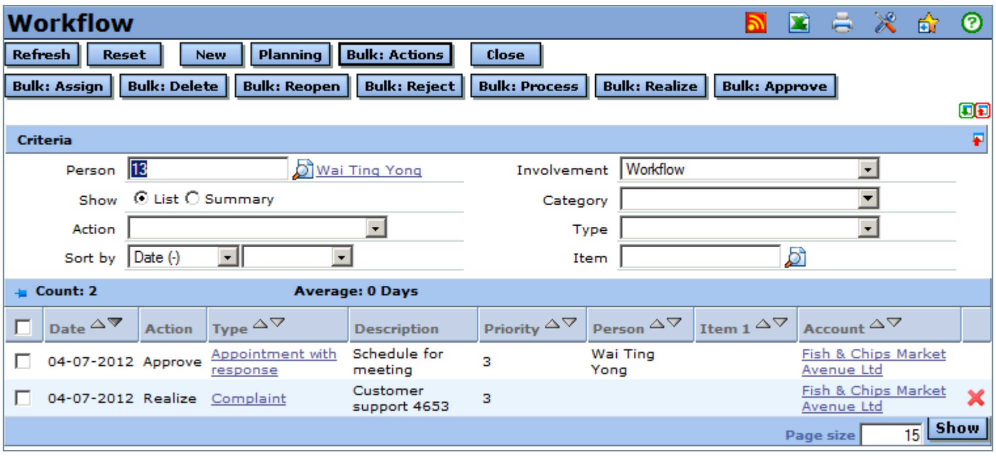
8. Under the **Recently created** or **All request** types section, select the required request type.
9. Click **New**.
10. Define the fields.
11. Click **Submit**.
12 Click **Close** to exit.

To copy requests:

1. Click **Customers** at the top bar.
2. Go to Reports → Accounts → Search.
3. On the **Search** page under the **Search** section, click **Accounts**.
4. On the **Accounts: Search** page, define the search criteria, and then click **Show**.
5. Select the required account under the **Account name** column.
6. On the account card under the **Requests** section, select the request that you want to copy by clicking the hyperlinked request.
7. On the selected request page, click **Copy.** The **Request: New** page will be displayed.
8. Under the **Recently created** or **All request types** section, select the required request type.
9. Under **Select the fields to copy to the request** section, select the check box(es) of fields containing information that you want to copy from the existing request to the new request.
10. Click **New**.
11. Define the fields.
12. Click **Submit**.
13. Click **Close to exit.**

4.4 Workflow

As a reseller, you can manage requests in your workflow via **Workflow** on the top menu or left menu. On the **Workflow** page, you can view requests that are waiting for your actions, create requests, as well as perform bulk actions on those requests.



4.4.1 Creating requests

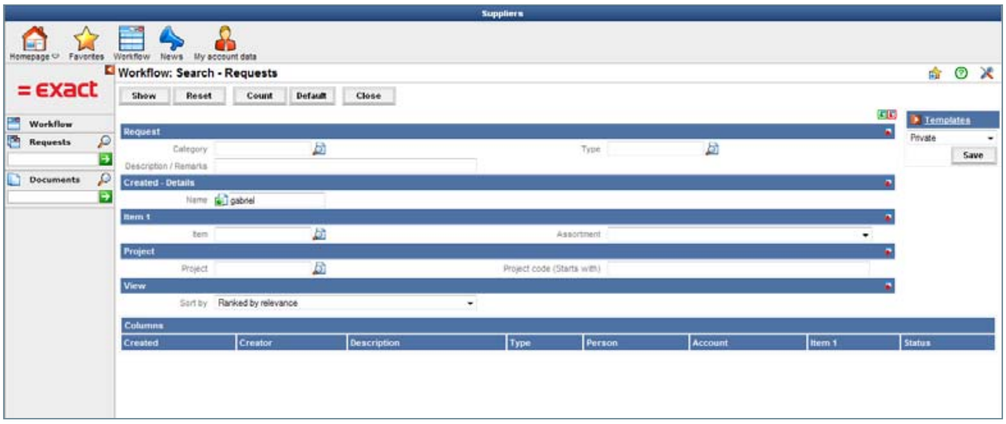
As a reseller, you can only create a request that is tied to a request type with security level **0**, **1**, or **2**.
To create requests:

1. Click **Workflow** on the top or left menu.
2. Click **New**.
3. Select the required request type under the **Recently created** or **All request types** section.
4. Define the fields.
5. Click **Submit**.

Note: You can also create requests by clicking **My account data** on the top menu, and then clicking **Workflow** under the **Monitor** section.

4.4.2 Searching and viewing requests

Once the request has been created, you can always view the request to check the status of the request to determine whether the request has been acted upon.



To search and view requests:

1. Click **Search: Requests** on the left menu.
2. Define the search criteria.
3. Click **Show**. The requests will be displayed.
4. Select the request that you want to view.
5. Click **Close** to exit.

4.4.3 Editing requests

Once the request has been created and submitted, you can still edit the request by adding or editing remarks in the request.

To edit requests:

1. Click **Search: Requests** at **Requests** on the left menu.
2. Define the search criteria.
3. Click **Show**. The requests will be displayed.
4. Select the request that you want to edit under the **Created** or **Description** column.
5. Make the necessary change(s).
6. Click **Save**.

4.4.4 Copying requests

If you want to create a request with similar information of another request, you can copy the request.

To copy requests:

1. Click **Search: Requests** at **Requests** on the left menu.
2. Define the search criteria.
3. Click **Show**. The requests will be displayed.
4. Select the request that you want to copy under the **Created** or **Description** column.
5. Click **Copy**. The **Request: New** page will be displayed.
6. Select a request type under the **All request types** section. The information from the previous request will be displayed and selected. Clear the respective check boxes if you do not want the particular information to be copied to the new request.
7. Click **New**.
8. Define the fields.
9. Click **Submit**.

Note: All fields with the "**!**" icon are mandatory.

4.4.5 Performing bulk actions on requests

You can perform bulk operations on more than one request in your workflow. When you click the **Bulk: Actions** button, several other buttons become available. These buttons allows you to perform actions on up to 25 requests at once.

To perform bulk actions on requests:

1. Click **Workflow** on the top or left menu.
2. Click **Bulk: Actions**. Seven additional buttons will be displayed, allowing you to assign, delete, reopen, reject, process, realize, or approve requests in bulk.
3. Select the check boxes next to the requests to indicate the requests involved in the bulk operation.

4. Click **Bulk: Assign**, **Bulk: Delete**, **Bulk: Reopen**, **Bulk: Reject**, **Bulk: Process**, **Bulk: Realize**, or **Bulk: Approve**. Depending on the bulk operation, the system may prompt you for more information or confirmation. Once the bulk operation is completed, the system will display a report on the success or failure of the operation on each request.
5. Click **Close** on the report page to display the workflow list.

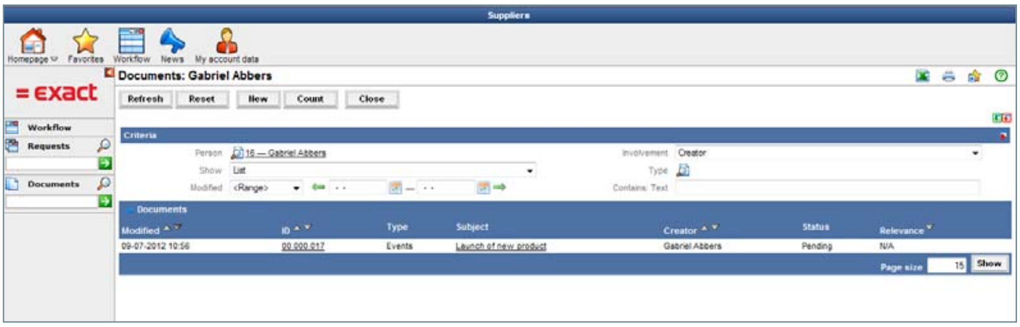
During the bulk operation, the system will automatically add a timestamp at the end of the **Remarks: Workflow** field of each of the selected requests. If the **Remarks: Workflow** field is not available or cannot be edited at the current request status, the timestamp will be added at the end of the **Remarks: Request** field. If both fields are not available or cannot be edited at the current request status, or the operation is **Bulk: Delete**, the timestamp will not be added.

4.5 Creating, Searching, and Viewing Documents

The reseller portal allows you to create documents, and search and view existing documents. For more information, see *6.3 Document Settings*.

You will require certain rights in order to perform these actions. See the following table for the actions and respective rights:

Actions	Rights required
Create documents	You can only create documents with the following security levels: – **2 — Partners** – **10 — Internal** – **101 — Project (Specific)**
Edit documents	You can only modify the following documents: – Documents that you have created. – Documents with **Creator / Owner** selected at the **Edit: Rights** field and your name is filled in the **Owner** field.
View and search for documents	You can view and search for the following documents: – Documents that you have created. – Documents with security level set to **0**, **1**, and **2**.



To create documents:

1. Click **New: Document** on the left menu. The **Document: New** page will be displayed.
2. Select a document type under the **Select: Document type** section.
3. Define the fields.
4. Click **Save**.

Note: All fields with the "**!**" icon are mandatory.

To search and view documents:

1. Click **Search: Documents** on the left menu. The **Documents: Search** page will be displayed.
2. Define the search criteria.
3. Click **Show**. A list of documents will be displayed.
4. Select the document that you want to view under the **Subject** column.
5. Click **Close** to exit.

Note: You can also search for documents by clicking **My account data** on the top menu, and then clicking **Documents** under the **Monitor** section.

4.6 Resellers Forums

You can access forum to view or share topics of interest. This feature provides you with a platform to communicate with other users of Exact Synergy Enterprise.

To view threads:

1. Click **Customers** at the top bar.
2. Go to Reports → General → Resellers - Forum.
3. Click the hyperlinks on the left to view the respective topics.
4. Click the hyperlink under the **Topics** column.

To create threads:

1. Click **Customers** at the top bar.
2. Go to Reports → General → Resellers - Forum.
3. Click the hyperlink of a forum.
4. Click the hyperlink of a subtopic under the **Topics** column.
5. Click the **Begin new conversation** hyperlink.
6. Type the subject of the thread.
7. After filling in other relevant information, click **Post**.

4.7 Tests

You can obtain an overview of planning requests for tests. When you receive a planning request, you can execute the test within the start and end dates and time indicated in the planning request. If you have deleted the planning request before executing it, a request must be recreated before you can execute it.

When you execute a test, a page introducing the test will be loaded. Each question will be displayed on a separate page. The answers selected will be stored in answer requests so that the full reporting capabilities in Exact Synergy Enterprise can be utilized to analyze the results.

You can also obtain an overview of scores that you have obtained in tests.

To execute tests:

1. Click **Customers** at the top bar.
2. Go to Reports → Tests → Execute.
3. Under the **Test** column, click the hyperlinked description of the test. A page with the introduction of the test will be displayed.
4. Click **Start** to begin the test. You can click **Next** to go to the following question, or **Previous** to return to the previous question.
5. Click **Finish** to complete the test. You cannot change the answers once the test is completed.

Tip: For questions that you have not answered or need to be reviewed later on, you can mark them by selecting the **Review** check box. While executing the test, you can click the **Review** button to view the questions that you have marked.

To view test scores:

1. Click **Customers** at the top bar.
2. Go to Reports → Tests → Scores.
3. Define the criteria under the **Criteria** section.
4. Click **Show**.

4.8 Sales Orders and Fulfillments

As a reseller, you can search for and view quotation and sales order records belonging to your account.

To view invoiced sales orders:

1. Click **Customers** at the top bar.
2. Go to Reports → Orders → Quotations / Sales orders.
3. Under the **Criteria** section at **Date**, define a date or a range of dates to display sales orders or credit notes created on the selected date(s).
4. At **Currency**, select the currency to display sales orders or credit notes created with the defined currency.
5. Click **Show**.

Note: This feature only displays sales order and credit note records that have been invoiced and belong to the account displayed at **Reseller**.

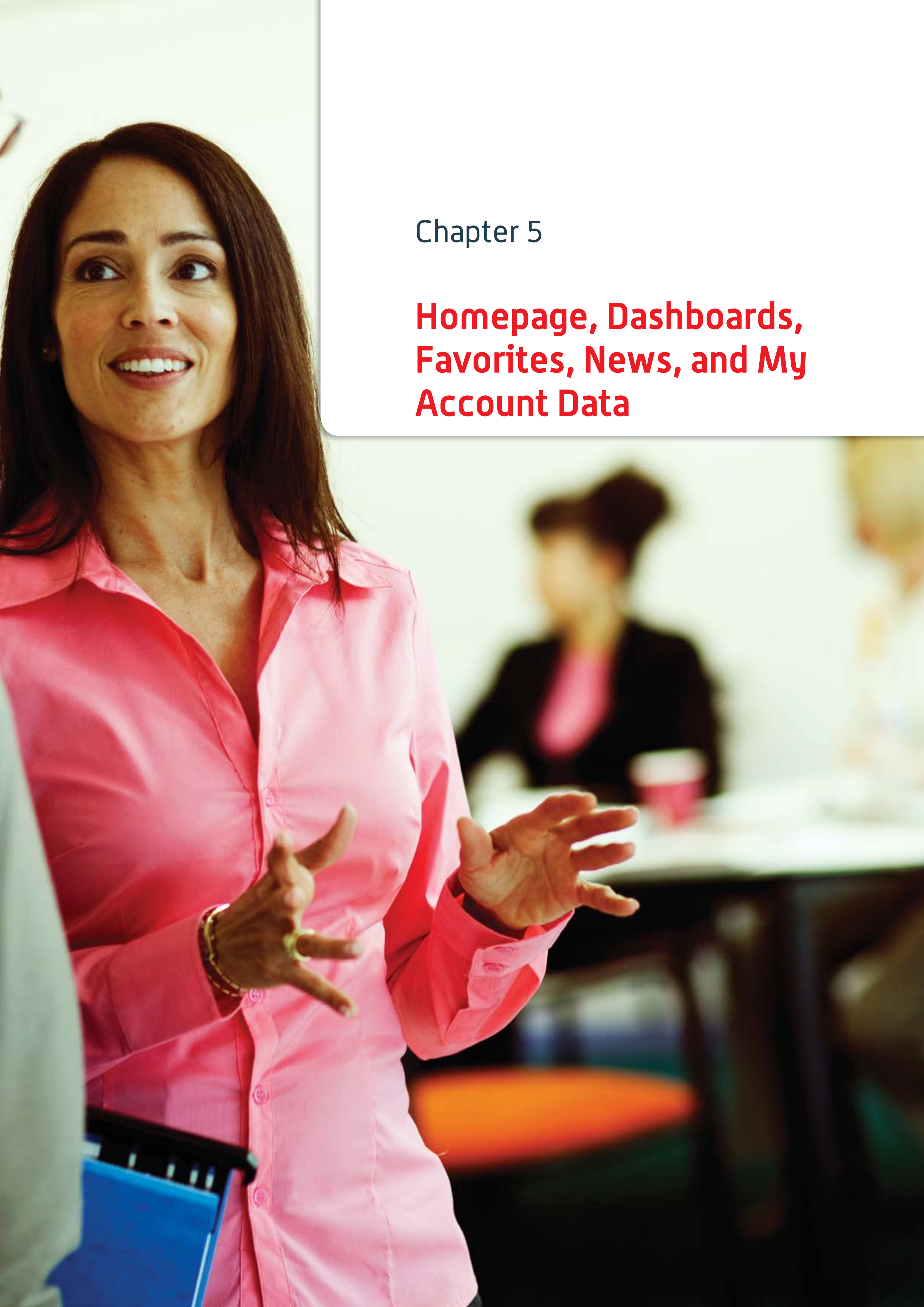
To view all sales orders:

1. Click **Customers** at the top bar.
2. Go to Reports → Orders → Fulfillment.
3. Under the **Criteria** section at **Account**, type or select an account to view the sales orders belonging to the selected account.
4. Click **Show**.

Note: This feature displays sales order and credit note records that have or have not been invoiced and belong to the account defined at **Account**.

Chapter 5

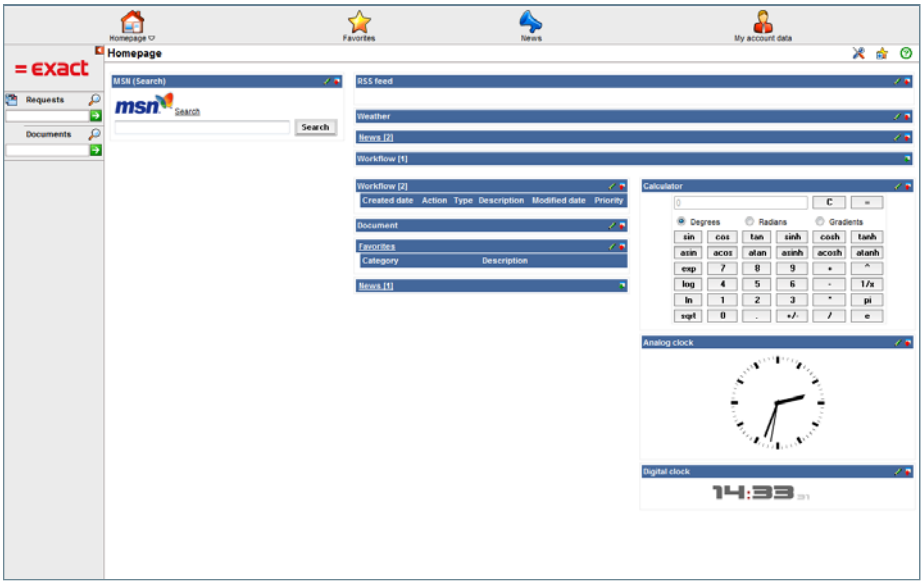
Homepage, Dashboards, Favorites, News, and My Account Data



5. Homepage, Dashboards, Favorites, News, and My Account Data

5.1 Homepage

The homepage allows easy navigation to various pages, such as favorites, news, requests, and others. You can also customize the homepage by adding web parts to the homepage. The web parts act as a shortcut whereby you can easily view the news, favorites, clock, and others on the homepage instead of accessing so many pages to get to the page that you want. The homepage will always be displayed when you start Exact Synergy Enterprise unless you have set dashboards as your default page. However, you can always view the homepage by clicking on at the top menu, and then selecting **Homepage**.



To add and/or remove web parts on the homepage:

1. Click at on the top menu.
2. Select **Homepage**.
3. Click **Customize**.
4. Click **Add widget**.
5. Select the check box(es) of the web parts to be added and the positions of the web parts, or clear the check box(es) of the web parts to be removed.
6. Click **Save**.

To set the homepage as default:

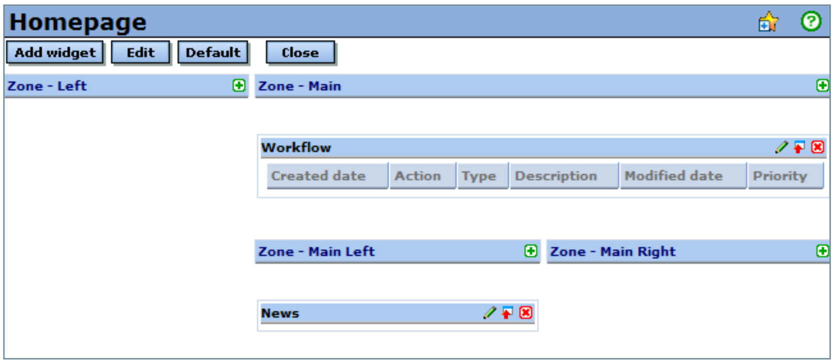
1. Click at on the top menu.
2. Select **Homepage**.
3. Click **Customize**.
4. Click **Default**. The message "Are you sure that you want to use the default settings? This action can't be undone." will be displayed.
5. Click **Yes**.

5.1.1 Customizing the homepage

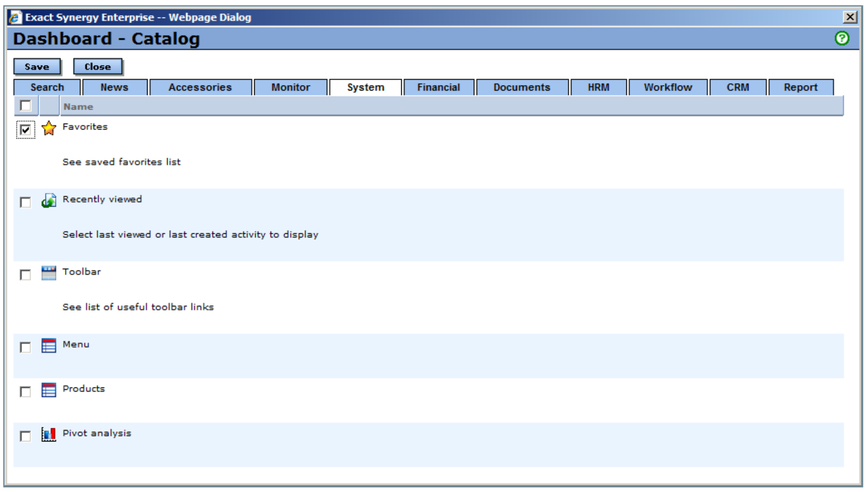
You can customize your homepage to display only the information that you want to view.

To customize the homepage:

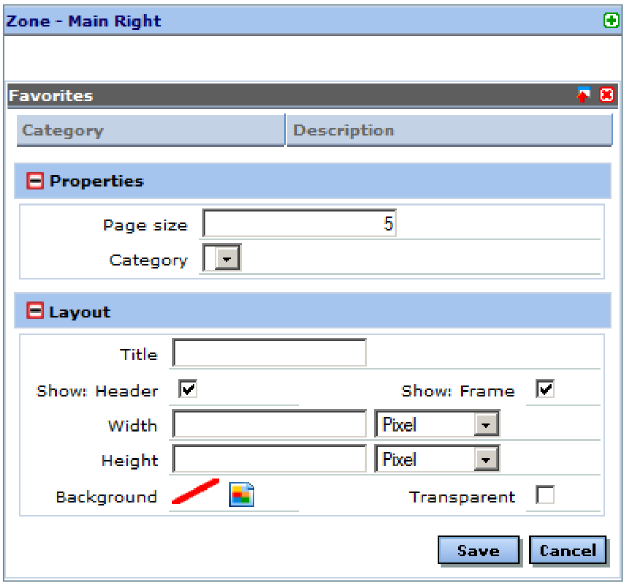
1. Click **Homepage** on the top menu.
2. Click **Customize**. You will see the following page:



3. Click **Add** under the **Zone – Left**, **Zone – Main**, **Zone – Main Left**, or **Zone – Main Right** section to add web parts into the respective section on your homepage. For an example, you would like to see the listing of the links that you have saved as favorites under the **Zone – Main Right** section. Click **Add** under the **Zone – Main Right** section. The **Dashboard – Catalog** page will be displayed. Then, select the **Favorites** check box under the **System** tab, as shown in the following page:



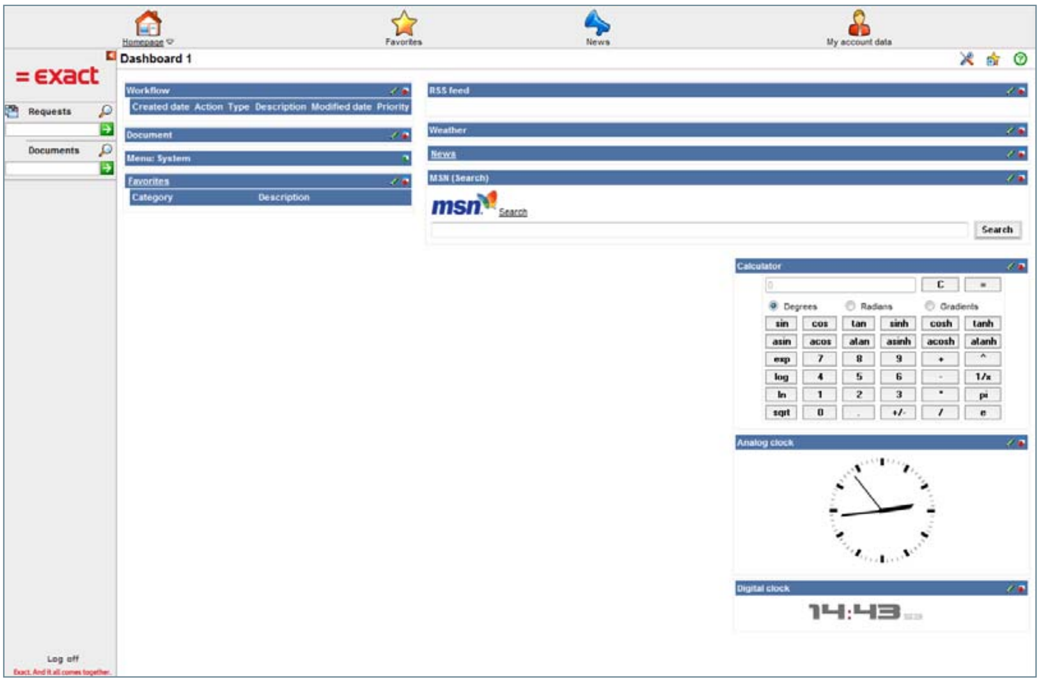
4. Click **Save**. The web part that you have selected will be displayed under the respective section.
5. Click **Edit** under the section to modify the properties and layout of the web part. The fields displayed differ from one web part to another. See the following page for an example:



6. Once you have defined the properties and layout settings, click **Save**.
7. Click **Close** to display your homepage.

5.2 Dashboards

Dashboards are similar to a homepage whereby you can add web parts, such as news, favorites, search engine, and others on the dashboard. Unlike a homepage, you can create many dashboards, and make the selected dashboard as your default page instead of the homepage. With the numerous dashboards that can be created, you can customize every dashboard to display different web parts. For example, dashboard 1 with the weather, news, and MSN search web parts, and dashboard 2 with the document and workflow web parts.



To create dashboards:

1. Click at on the top menu.
2. Select **Add dashboard**. The **Dashboard: New** page will be displayed.
3. Type the name of the dashboard at **Name**. This is mandatory. If you want this dashboard to be the default dashboard, select the **Set as default** check box. Once you have selected the **Set as default** check box, this dashboard will always be displayed when you start Exact Synergy Enterprise.
4. Click **Save**.

To view dashboards:

1. Click at on the top menu.
2. Select the dashboard that you want to view. The dashboard will be displayed.

To edit dashboards:

1. Click at on the top menu.
2. Select the dashboard to be edited.
3. Click **Customize**.
4. Click **Edit**.
5. Make the necessary change(s).
6. Click **Save**.

To add and/or remove web parts on dashboards:

1. Click at on the top menu.
2. Select the dashboard to which you want to add web parts.
3. Click **Customize**.
4. Click **Add widget**.
5. Select the check box(es) of the web parts to be added and the positions of the web parts, or clear the check box(es) of the web parts to be removed.
6. Click **Save**.

To delete dashboards:

1. Click at on the top menu.
2. Select the dashboard that you want to delete.
3. Click **Customize**.
4. Click **Delete**. A message "Are you sure you want to delete this dashboard? This action can't be undone." will be displayed.
5. Click **Yes**.

5.3 Favorites

You can add pages in Exact Synergy Enterprise as your favorites. Be it a page of a document that you frequently access or a request that you want to revisit in the near future, you can add the page to your favorite list so that you can quickly access it whenever you want.

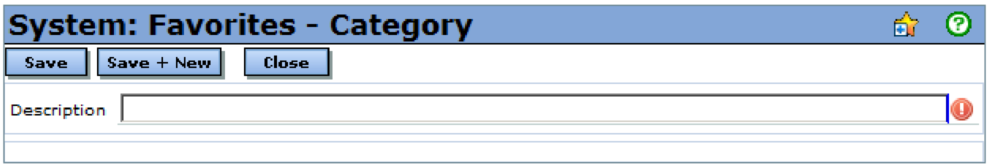
You can view and manage the favorites that you have created. You can also create categories and group your favorites to the respective categories.

5.3.1 Creating, modifying, and deleting favorite categories

You must create at least one category before you can mark a page as a favorite.

To create favorite categories:

1. Click **Favorites** on the top menu.
2. Click **Category**. You will see the following page:



3. At **Description**, type the name of the category. This is mandatory.
4. Click **Save**.

To modify names of favorite categories:

1. Click **Favorites** on the top menu.
2. Click **Categories**.
3. Click the description of the category under the **Description** column.
4. At **Description**, type a new name for the category.
5. Click **Save**.

To delete favorite categories:

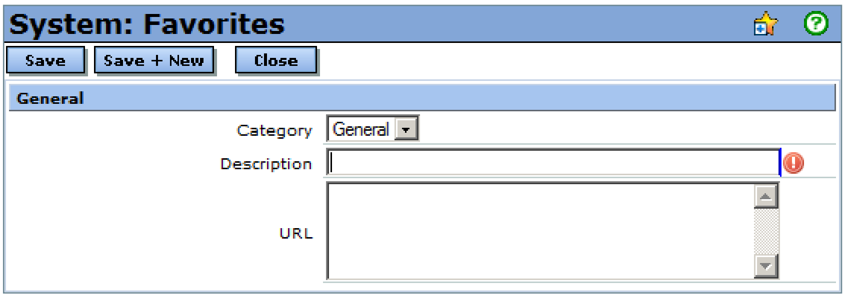
1. Click **Favorites** on the top menu.
2. Click **Categories**.
3. Click the description of the category under the **Description** column.
4. Click **Delete**. A message will be displayed to ask you for confirmation.
5. Click **OK** to proceed with the deletion process.

5.3.2 Marking pages as favorites

There are two ways to mark a page as a favorite.

To mark pages as favorites:

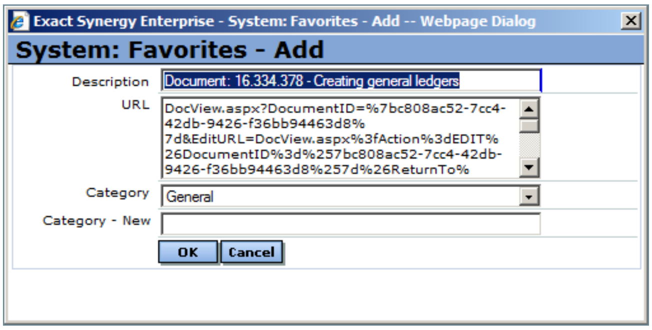
1. Click **Favorites** on the top menu.
2. Click **New**. You will see the following page:



3. At **Category**, select the category that the page should be grouped under.
4. At **Description**, type the description of the page. This is mandatory.
5. At **URL**, type the hyperlink of the page.
6. Click **Save**.

To mark pages as favorites via respective pages:

1. Go to the page that you want to mark as favorites.
2. Click **Favorites** at the top right of the page.



3. At **Description**, type the description of the page. By default, the title of the page is filled.
4. At **URL**, the hyperlink of the page is displayed.
5. At **Category**, select the category that the page should be grouped under. If you want to group the page under a new category, type the name of the category at **Category – New**.
6. Click **OK**.

5.3.3 Removing pages from favorites

Pages that have been marked as favorites can be removed.

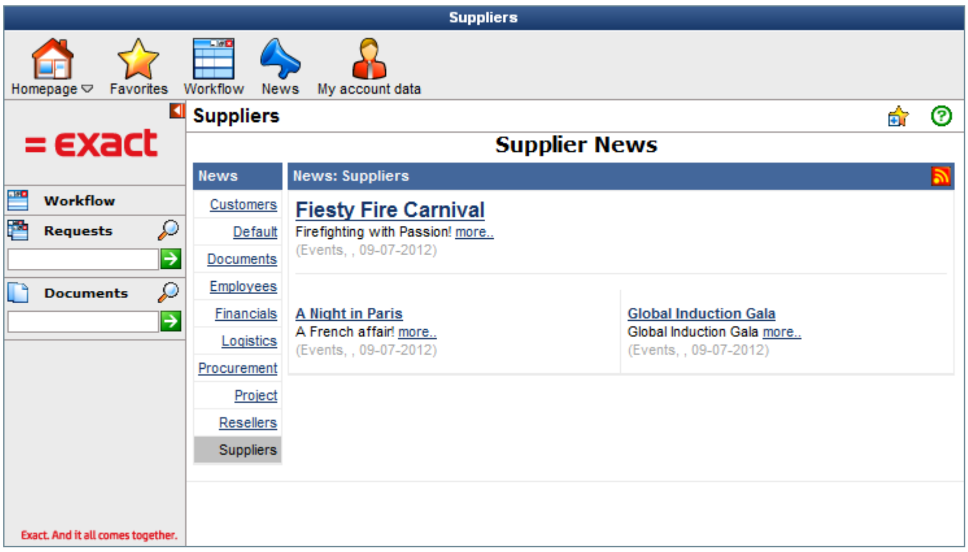
To remove pages from favorites:

1. Click **Favorites** on the top menu. You will see the following page:

2. Under the **Criteria** section at **Categories**, select a category to view only pages that are grouped under the category.
3. Click **Refresh**.
4. Click under the **Delete** column next to the page that you want to remove.

5.4 News

As a customer, supplier, or reseller, you can create, modify, and view news that is relevant to you. News is created as documents. You can only modify the documents if you are the creator of the documents or have been given the edit rights to the documents. For more information about documents and rights to perform actions, see *Creating, Searching, and Viewing Documents* at *3.3 Supplier Portal or Creating, Searching, and Viewing Documents* at *4.4 Reseller Portal.*



To view news:

1. Click **News** on the top menu.
2. Under the **News** section, click a hyperlink to view the respective news. For example, clicking **Suppliers** will display documents that have security levels set to **0**, **1**, and **2**.
3. Click the subject of the news to view the news.

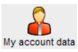
Note: Only documents that have been published as **Frontpage** will be displayed.

5.5 My account data

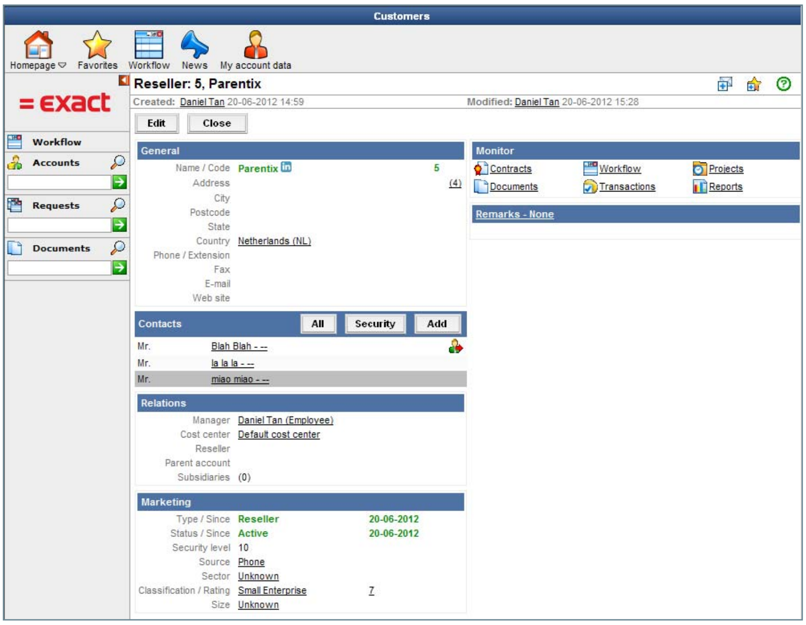
My account data stores information, such as addresses, contacts, and reseller rates of the account. In **My account data**, you can manage the portal rights for your contacts or edit the cards to keep information up-to-date. Furthermore, you can find account specific documents and other related information via the **Monitor** section.

5.5.1 Editing My account data

To edit My account data:

1. Click 

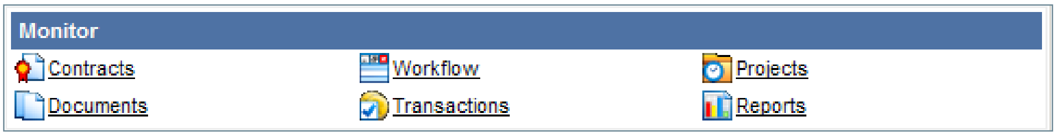
on the top menu. The following page will be displayed.



2. Click **Edit.**
3. Make the necessary changes, and then click **Save.**
4. Click **Close** to exit.

5.5.2 Utilizing the Monitor section

The **Monitor** section in **My account data** stores links to information related to the account. For example, you can view, copy, or request documents on the account by clicking **Documents** under the **Monitor** section.



Note: The **Contracts, Documents**, **Workflow**, **Projects**, and **Reports** hyperlinks are available for all three portals. The customer and reseller portals have an extra hyperlink called **Transactions**.

To view contracts:

1. Click **My account data** at the top menu. Alternatively, click **Customers** or **Suppliers** at the top bar, and then go to Reports → My account data → My account data.
2. On the account card under the **Monitor** section, click **Contracts**.
3. On the **Contracts: Results** page, select the required contract that you want to view.
4. Click **Close** to exit.

To view documents:

1. Click **My account data** at the top menu. Alternatively, click **Customers** or **Suppliers** at the top bar, and then go to Reports → My account data →My account data.
2. On the account card under the **Monitor** section, click **Documents**.
3. On the **Documents** page, define the fields under the **Criteria** section.
4. Click **Refresh**.
5. Select the document that you want to view.

To view workflows:

1. Click **My account data** at the top menu. Alternatively, click **Customers** or **Suppliers** at the top bar, and then go to Reports → My account data → My account data.
2. On the account card under the **Monitor** section, click **Workflow**.
3. On the **Workflow** page, define the fields under the **Criteria** section.
4. Click **Refresh**.
5. Select the required workflow that you want to view.

To view transaction reports for accounts receivable:

1. Click **My account data** at the top menu. Alternatively, click Customers or Suppliers at the top bar, and then go to Reports → My account data → My account data.
2. On the account card under the **Monitor** section, click **Transactions**.
3. On the **Receivables** page, define the fields under the **Criteria** section.
4. Click **Refresh**.
5. Select the required report that you want to view.

To view projects:

1. Click **My account data** at the top menu. Alternatively, click **Customers** or **Suppliers** at the top bar, and then go to Reports → My account data → My account data.
2. On the account card under the **Monitor** section, click **Projects**.
3. On the **Projects** page, select the required project that you want to view.
4. Click **Close** to exit.

To view reporting services integration reports grouped under CRM:

1. Click **My account data** at the top menu. Alternatively, click **Customers** or **Suppliers** at the top bar, and then go to Reports → My account data → My account data.
2. On the account card under the **Monitor** section, click **Reports**.
3. On the **CRM** page, define the fields under the **Criteria** section.
4. Click **Refresh**.
5. Expand the reports list under the **Reports** section, select the required report that you want to view.

Chapter 6

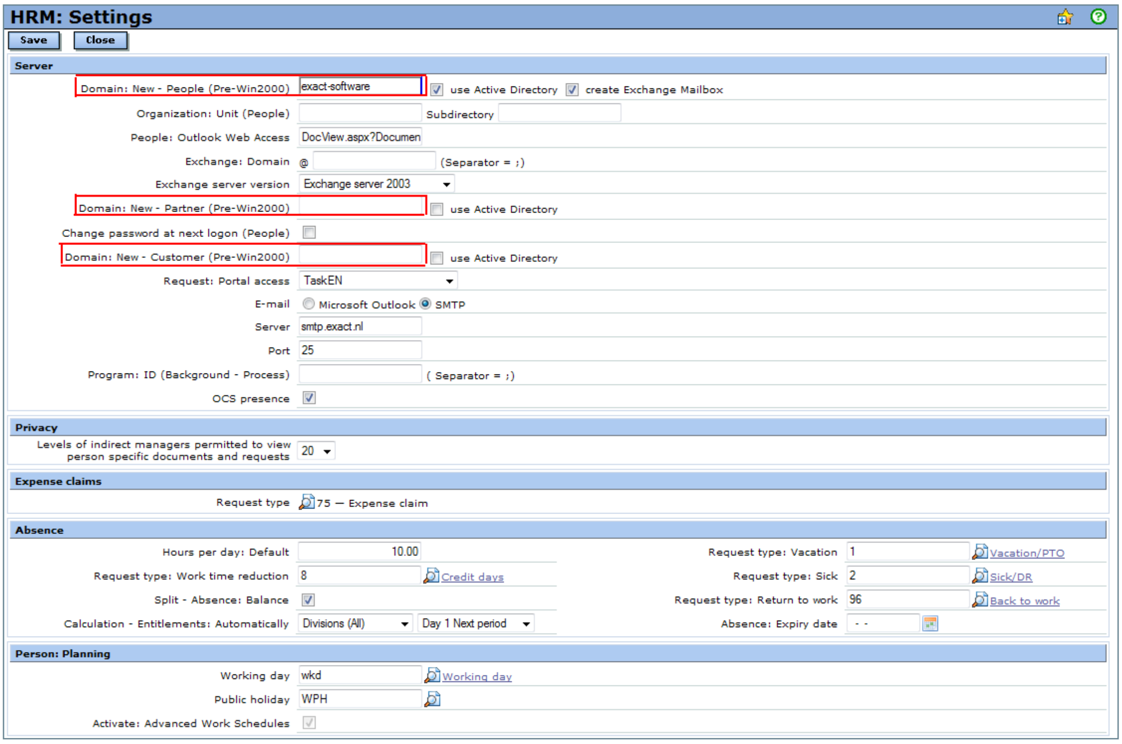
Setup

6. Setup

Several settings must be defined by the administrator of the parent company before customers, resellers, and suppliers can access the portals. Furthermore, license **YA1850** is required to access the customer portal, **YA1860** to access the reseller portal, and **WWS1870** to access the supplier portal.

6.1 HRM Settings

The domain for the customer, reseller, and supplier must be defined in **HRM general settings.**



To define HRM general settings:

1. Go to HRM → Setup → General → Settings. The **HRM: Settings** page will be displayed.
2. Click **Edit**.
3. At **Domain: New - People (Pre-Win2000)** under the **Server** section, type the domain in which a new Exact Synergy Enterprise user (person) will be created. The system will then create a Windows account based on the information filled in. Select the **use Active Directory** check box if an active directory is used. An active directory allows you to differentiate the location of the created NT accounts.
4. At **Domain: New - Partner (Pre-Win2000)** under the **Server** section, type the domain in which a new Exact Synergy Enterprise user (partner) will be created. You can use the same domain as used for the person or use a different domain. Select the **use Active Directory** check box if an active directory is used.

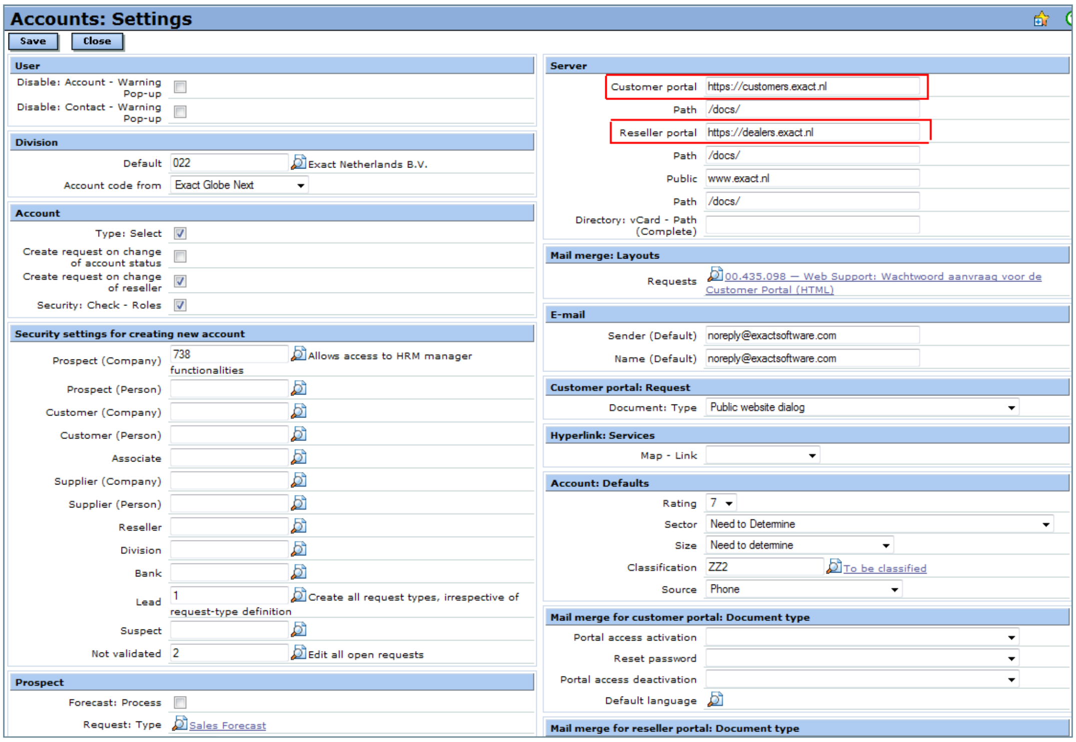
5. At **Domain: New - Customer (Pre-Win2000)** under the **Server** section, type the domain in which a new Exact Synergy Enterprise user (customer) will be created. You can use the same domain as used for the person or use a different domain. Select the **use Active Directory** check box if an active directory is used.

Note: To modify the **HRM** general settings, function right **88 - Maintain HRM settings** is required. Users with the **HR** role have this function right.

6.2 Account and Contact Settings

6.2.1 Account settings

The portal settings on the **Accounts: Settings** page must be defined.



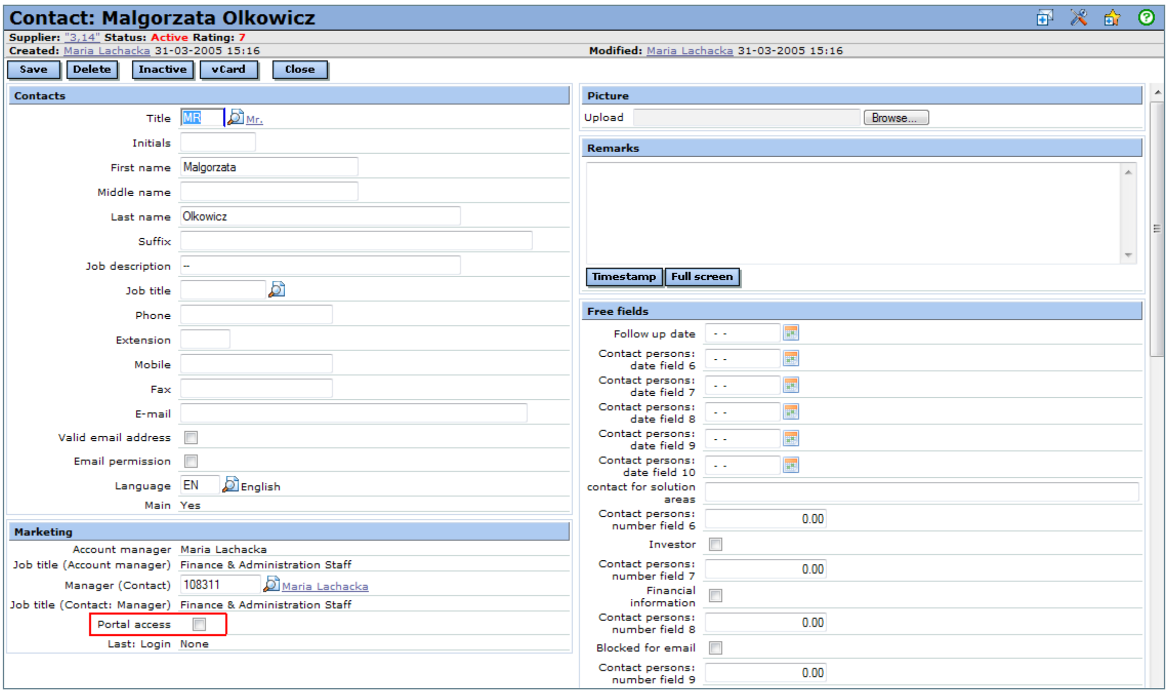
To define account settings:

1. Go to Customers → Setup → Other → Settings. The **Accounts: Settings** page will be displayed.
2. Click **Edit**.
3. At **Customer portal** under the **Server** section, type a portal address for the customer. For example, “customers.exact.com”.
4. At **Reseller portal** under the **Server** section, type a portal address for the reseller. For example, “resellers.exact.com”.
5. Click **Save**.

> **Note:** To define account settings, function right **222 - Maintain CRM settings** is required. Users with the **Administrator** or **Customer manager** role have this function right.

6.2.2 Contact settings

If you want account contacts to have access to the customer, reseller, or supplier portal, you have to give them rights to access the portal.



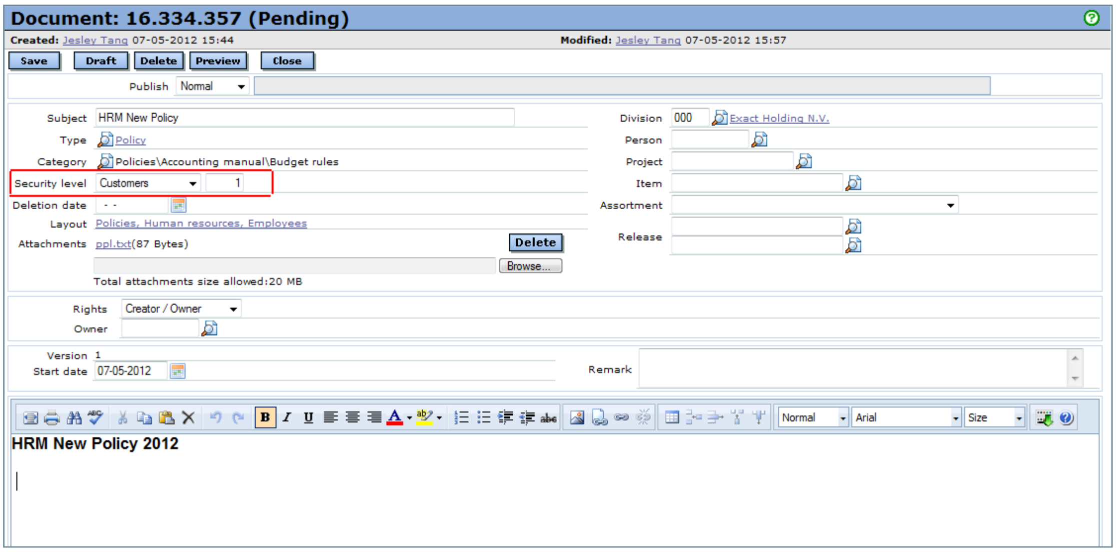
To define contact settings:

1. Go to Customers → Reports → Accounts → Search. The **Accounts: Search** page will be displayed.
2. Define the search criteria.
3. Click **Show**.
4. Select the required contact under the **Contact: Last name** column.
5. Click **Edit**.
6. Select the **Portal access** check box under the **Marketing** section.
7. Click **Save**.

Note: To allow the main contact person of the reseller to have web access, function right **121 - Allows to give web access to main contact person of reseller** is required. Users with the **Customer manager** or **Reseller manager** role have this function right. To allow the main contact person of the supplier to have web access, function right **448 - Allows to give web access to main contact person of supplier** is required. Users with the **Supplier manager** role have this function right. To edit the information for contact persons, function right **495 - Maintain CRM data when MainCRMBackOffice is set for current division** is required. Users with the **Administrator** role have this function right.

6.3 Document Settings

If you want your customers, resellers, or suppliers to view the documents that you have created, the documents must contain the correct security level such as **1** for customers and **2** for resellers and suppliers, and **All** for everyone. The security level is defined when you create a document. If the security level is not set correctly, the customers, resellers, and suppliers will not be able to view the document(s).

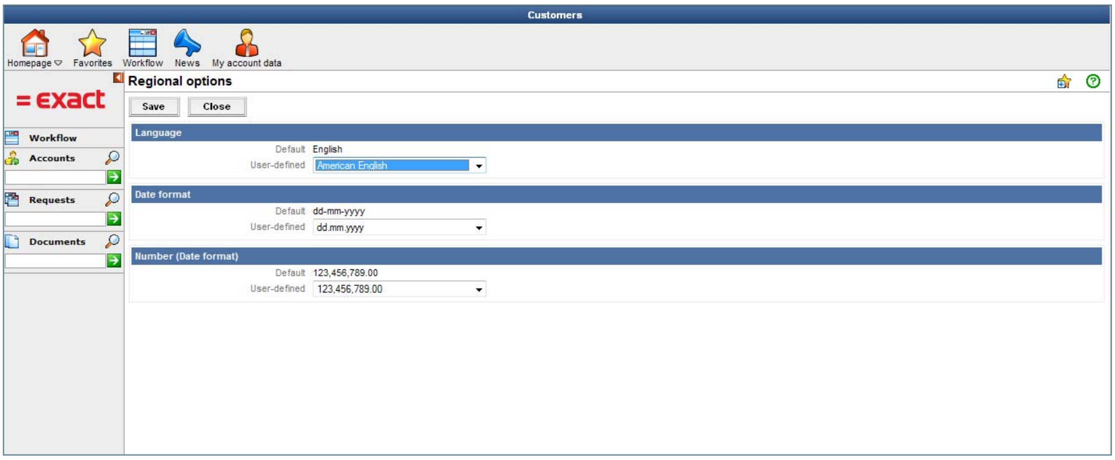


To define document settings:

1. Go to Documents → Reports → Documents → Search. The **Documents: Search** page will be displayed.
2. Define the search criteria.
3. Click **Show**.
4. Select the required document under the **Subject** column.
5. Click **Edit**.
6. At **Security level**, select **Customers** to allow your customers to view the document or **Partners** to allow resellers and suppliers to view the document.
7. Click **Save**.

6.4 Language, Date, and Number Settings

In the customer, reseller, and supplier portals, the language, date format, and number format can be defined.



To define language, date, and number settings:

1. Click **Customers** or **Suppliers** at the top bar. The **Menu: Customers** page will be displayed for customers and resellers, and **Menu: Suppliers** page will be displayed for suppliers.
2. Click **Setup**.
3. Under the **General** menu, click **Regional options**. The **Regional options** page will be displayed.
4. Define the fields.
5. Click **Save**.

Chapter 7

Appendix

7. Appendix

The following table lists actions that a customer, supplier, and reseller can and cannot perform:

Action	Customer	Supplier	Reseller
Requests			
Create and copy requests	✔	✔	✔
Search and view requests	✔	✔	✔
Perform bulk actions on requests	✖	✔	✔
Workflow			
View workflow listing	✖	✔	✔
Documents			
Create documents	✖		
Search and view documents	✔ Documents at security levels **0** and **1**.	✔ Documents at security levels **0**, **1**, and **2**. Documents linked to a project that has its security level set to **2**.	✔ Documents at security levels **0**, **1**, and **2**.
Homepage			
View homepage	✔	✔	✔
Customize homepage	✔	✔	✔
Dashboards			
Add dashboards	✔	✔	✔
Favorites			
Create favorite categories	✔	✔	✔
Mark pages as favorites	✔	✔	✔
Remove pages from favorites	✔	✔	✔
News			
View news	✔	✔	✔
Accounts			
Create and delete account entries	✖	✖	✔
Search and view account cards	✖	✖	✔
Modify account details	✔	✔	✔
Add and modify contacts	✔	✔	✔
Give portal access to or remove portal access from other contacts	✖	✔ Only the main contact can perform this.	✔ Only the main contact can perform this.

Action	Customer	Supplier	Reseller
Upload vCards of contacts	✓	✓	✓
View transaction reports of own account	✓	✗	✓
Search and view projects of own account	✓	✓	✓
View reporting services integration reports	✓	✓	✓
Contacts			
Search and view contracts	✓	✗	✓
View contract revenues	✗	✗	✓
Items			
Search and view items	✗	✓	✗
Reseller forum			
Access reseller forum	✗	✓	✓
Orders			
View sales orders of own account	✓	✓	✓
Tests			
Execute tests	✗	✓	✓
View test scores	✗	✓	✓
Settings			
Define language, date, and number settings	✓	✓	✓
Help			
Access help files	✓	✓	✓

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