intSpec: Customers > Portal > AppSpec (Customer Portal - formerly OneSource Online Orders or osOO)

Last Modified on 08/25/2026 6:15 pm EDT

TEMP TO DO LIST

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Customer Portal - Overview

- This WAS called OneSource Online Orders (osOO) in version 4, and was a separate web app that connected (via IIS and web services) to the OneSource V4 app.
- This will now be called the 1place 'Customer Portal'
- This will provide OUR customers with a tool to allow 'their' customers (our Customers' Customer) a way to login to 1place to allow them to:
    - Create and Manage Login credentials (upon receiving an email from a user of 1place--from that Customer's screen).
    - Search for parts
    - See item description, item picture(s), item list price, item special price (for that customer--based on that customer's price settings)
    - Place a Sales Order for parts
    - Pay for the Order / Invoice (using eBizCharge)
    - View Order History
    - Create, View, and Manage Support Tickets (Later on...)

Customer Portal - Hierarchy

- Azure
    - VM (for 1place site)
        - Our CUSTOMER (ABC Company) will put their Customer records, their inventory records, and Orders from their Customers, ETC... in 1place
        - Our CUSTOMER (ABC Company) will have Customer Detail Records, such as XYZ Customer.
        - Our CUSTOMER (ABC Company) make give some of their customers (such as XYZ Customer) LOGIN RIGHTS to a PORTAL that allows their customer (XYZ) to LOGIN to 1place to see a 'limited' set of data (related to Parts, Prices, and Quotes/Orders they create IN the Portal)
            - THEN XYZ Customer can LOGIN to the PORTAL using a URL such as: abccompany.1place.cloud
            - Then XYZ can search for parts, see prices, create and save Quotes, create Sales Orders, etc WITHOUT HAVING TO CALL IN TO ABC COMPANY to get that info.

Steps to Turn on Customer Portal and Invite Customer(s)

- Explain to Customer that there is an additional fee for a Portal site license.
- Activate the Customer Portal
    - Settings > Customer Portal > Activate Portal Now
- Then, for each customer that you want to allow access to the Portal:

    - Look up the Customer Detail record.
    - Click on the Customer Portal > Portal Users
    - Then add a User Name, Email, Status, and then click the Send Invite button.
    - The user will receive an email that directs them to activate the account and then provides a link to set a password.
- The user will then login to the Portal by:
    - User opens Browser and types: 1place.cloud
    - User enters email and password.

1place Customer Portal Settings (controlled by OUR customer)

- This will be located here: Settings > Customer Portal. See portalSpec: Customer Portal (Settings)

1place Portal Screens

- New Left Nav Bar with these options:
    - **Dashboard**
    - **Search / Find Parts** (See: portalSpec: Search / Find Parts)
        - **Checkout**
        - **Sales Order** (just created)
    - **Make a Payment**
    - **Return a Part**
    - **Statements**
    - **Sales History** (See: portalSpec: Lists)
        - NOTE: ALL OF THESE (Except Quote) will be non editable, and buttons that do other things to make new transactions - disabled).
        - Quotes (See portalSpec: List screens)
        - Sales Orders
        - Invoices & Credits
        - Payments
        - Returns
    - **Support**
    - **Account**
        - Users
    - **Help**
- New Top Nav Bar with these options:
    - NOTE: We will have **NO** top nav buttons (we will have buttons to add, find, etc on each individual screen).
    - NOTE: Customers will not need to 'add customers, vendors, items, etc.... On an ECOM type site you don't 'add' an order. You search for parts, add them to the cart, and the click Order...
- New Settings Icon (in top right) with these options:
    - Account
    - Logout
- Sign up Screen.
- Login Screen, such as xyz.osqbo.com (assuming we create a DNS URL such as xyz.osqbo.com for a customer of ours called something like XYZ Company.
- Forgot Password Screen (and system)

Customer Portal - General (Work Flow)

- A OneSource employee (or a Customer User) can TURN ON (Activate) the Customer Portal using Setttings > Customer Portal > Activate Portal button. This makes these initial changes:
  - The Portal Name and Activation details are stored in the SystemSettings table.
  - When the Activate Now button is clicked it copies numerous settings over to the **CompanyMaster.CompanyCustomerPortalSettings**
  - If a OneSource employee or a Customer User De-activates the Portal (after the portal settings have already been copied to the **CompanyMaster.CompanyCustomerPortalSettings** table) then when a user browses to the actual portal URL we will HIDE the LOGIN and SIGN UP sections and display this message to the user: This %Customer Portal Company% portal is currently turned off. Please check back later, or contact %Customer Portal Company% for more details.
  - ALSO, to give OneSource the final say on if an existing Portal will be 'enabled' if the **CompanyMaster.CompanyCustomerPortalSettings.PortalDisabledByUs = True** then show the same login screen, with the same login message, as if the Customer disabled the Portal themselves.
- When a OneSource 'user' wants to invite a Customer to be able to login to the Customer Portal (to find parts, place orders, make payments, etc) the user will follow these steps:
  - User will look up a Customer record in OneSource.
  - User will right-click on selected Contact name and select 'Send Portal Invitation'. (This option will always be visible, but if the Portal is NOT enabled we will give this message: "The Customer Portal provides a way for your customers to login to a limited view of OneSource to search for parts, create orders, make payments, etc. This is an optional service. To enable this service please contact OneSource Software for more information."
  - If the Customer Portal is enabled for the Company, after clicking on 'Send Portal Invitation', a popup e-mail type form will appear that will work like this:
    - To: Contact Email Address
    - From: The user sending the invitation
    - Subject: Invitation from [Company Name] to create Customer Portal login
    - Body:
      - [Contact First Name]
      - (blank)
      - This email is an invitation to create a login to our system that will enable you to:
        - Search for parts, pricing, and availability.
        - Save Quotes.
        - Create and Send Sales Orders
        - View Invoices
        - Make Payments on Invoices
        - Request Part Returns
        - View Statements
        - Submit and View Support Requests
      - Please HERE to create a login now.
      - (blank)
      - Thank You,
      - (blank)
      - [Logged in User Full Name]
  - When the Customer clicks on the link it will open the Portal Sign-Up Screen. (See portalSpec: Sign Up Screen, Sign In Screen, etc...).
    - After clicking the Activate Account button the new user will be re-directed to the Customer Portal Login Screen (See portalSpec: Sign Up Screen, Sign In Screen, etc...).
  - The new user will now to be able to perform a number of self serve options, including:
    - Search for parts, pricing, and availability.
    - Save Quotes

        - Convert Quotes to Sales Orders
        - Create Sales Orders
        - Make Payments on Invoices
        - Request Part Returns
        - View Quotes, Sales Orders, Invoices, Credits, Payments, Returns, and Statements.

Portal Sign Up screen

Screen Layout

This screen will look much like the Create a New OneSource Account screen, but will have these features:

Left Side (1/3) of White Area

- This will display the Company Logo (for the OneSource Customer sending out the Portal Login Invitation)

Center 2/3 of White Area

- Title: Create new Portal Login
- Company Name
- Contact Full Name (and we can auto fill this)
- Email Address (and we can auto fill this)
- Password
- Confirm Password
- Captcha Code
- Create Account (button)
- (space)
- Already have a Portal Login? Sign In (link) When clicked it will re-direct the user to the Portal Login Screen.
- Forgot Password? (link) When clicked this re-direct the user to the

What happens next...

- After the user clicks the Create Account button it will re-direct the Customer to a screen located here: **/Home/SignUpNewPortalCustomer** (which will look and function much like the **/Home/SignUpNewCompany** screen)
- The /**SignUpNewPortalCustomer** will have the Customer's logo on the left side and the Title will be changed to: Thank you for signing up to login to the [Company Name] Portal.
- The rest of the text will remain the same as the /**SignUpNewCompany** screen.
- The email sent to the user will be the same type of activation email but with these exceptions:
    - To: Sent to the New User email.
    - From: The OneSource User that sent the email. ??
    - Subject: [X Company] Portal Registration
    - Body:
    - Thank you for signing up to use the [X Company] Portal. Please click on the Activate Account button (or the link provided) to complete the registration.
    - (space)
    - Activate Account (button), or link
    - (space)
    - If you have trouble finding or clicking the button, you may also copy the URL below to your browser and pressing Return. (Note: If this email is in your JUNK EMAIL box please move it to your Inbox so the button will appear properly).

    - (url)
- When the user clicks the Activate Account button it will direct them to this page: /Home/ActivatePortal. It will have the Company Logo on the left and will have all the same text except: Please click below to open Customer Portal.
    - When the Sign In button is clicked then redirect to: **/home/LoginPortal**

Portal Sign In screen

- This will function similar to the OneSource Sign In screen but will be located here: /home/LoginPortal
- This screen will have the Customer's Logo and will change the 'New to OneSource?' to: Create Login? (link) which will re-direct the user to the Portal Sign-Up screen.

Portal Forgot Password screen

This will function similar to the forgot password for OneSource, but will be branded with the Customer Logo and the title will be changed to: "Get help signing into [Company Name] Portal."

Steps to Setup Customer Portal

How to setup Customer portal in settings

1. Go to Settings-->Customer Portal-->General

2. Click on the Activate Portal button, It popup “Portal Activation Request Form”

3. Enter the detail like Name, Email, Phone# and Portal Login Name

4. Click on the “Activate now” button.

5. Customer Portal is activated,button is changed to “Deactivate Portal Now”

6. Customer Portal tab are shown in all the Customers info page

Steps to Create Customer portal users(Manual)

1. Go to Customer info-->Customer portal tab-->Portal user

2. Add the mandatory fields in the line like User name, Email (rest of the field in the table are auto-fill after the activation)

3. Click on the “Activate manually ” button.It popup a screen to add a temporary password.

4. Add a temporary password for that portal user.

5. Click on the “Save” button. it creates a customer portal for that user manually and gets activated.

Steps to Create Customer portal for Customers via Send Email Invitation.

1. Go to Customer info-->Customer portal tab-->Portal user
2. Add the mandatory fields in the line like User name, Email (rest of the field in the table are auto-fill after the activation)
3. Click on the “Send Invite” button.It popup the Email screen.
4. Email Screen are include From mail(From user setting),To mail (Given mail), Subject (auto-fill content & editable) and Activation link.
5. Click on the “Send ” button. It Sends an activation link to the given Email.
6. Go to that Respective Email and click on the Activation Link, it navigates to the Portal Password Creation Page.
7. Add a password & confirm password,Click on the“Create Portal Login”.it creates a Customer portal for Customers via Send Email Invitation.Steps to Login and find/Search the item of Customers customer Portal.

Steps to Login and find/Search the item of Customers customer Portal

1. Go to Settings-->Customer Portal-->Settings-->Category & search
2. Select the preferences like Item#,Year, Make, Model, category & sub Category.
3. Based on the selection preferences will be shown in the customer portal Find/search screen.
4. Go to Sign-in page,Enter the credentials Email & password.
5. Click on the “Sign in” button,It navigates to the customer portal Dashboard Screen.
6. Again Click on the “Find parts” button in the dashboard.
7. It navigate to Find/Search parts page in the customer portal.
8. Enter the search criteria like I Item#, Year, Make, Model, category & sub Category.
9. Click on the “Search” button.It shows the Items based on the search criteria.
10. Select Items in the table & add a quantity.
11. Click on the “Add to order” button,it fetches that item in the line with auto select.
12. After that click on the “Create Quote” or “Create sales order”.It Creates a Order for that portal user.

Portal - Search / Find Parts

(NOTE: We will provide a way for OUR customers to design the 'layout' of the Portal so our Customers Customer can easily find parts.... (We will put these layout setting here: Settings > Customer Portal > Layout settings. The layout settings will include the options listed below).

Left (Sub) Nav Bar (1/4 of width)

- [ ] Vin # (this will just be a placed holder that will do NOTHING right now--except appear on the search screen 'disabled'. When we add this functionality the user will be able to enter a VIN and it will auto fill in the Year, Make, Model, etc...)
- [ ] Item Number
- [ ] Year
- [ ] Make
- [ ] Model
- Category
- Sub Category
- Search (Button)

Right Side Header

- Sort By (drop down list: Item Number, OEM #, Description) (this will be in the top right corner)
- Items/Page (drop down list) (10, 50, 100)
- Path ("Breadcrumb" where I am in the hiarchy... of the search?) (in the Top Left Corner of Right Side section

Right Side Detail (Top 2/3)

(Insert example of final design here...)

Right Side Detail (Bottom 1/3)

This section will show lines (selected by the user) in the section above. It will be kind of like the 'shopping cart' showing the items selected by the user. This section will have a MOVABLE dividing line so the section can be made larger or smaller by the user, to see more or less of the section. The rows in the upper section will be about 5 small rows high (in order to show the picture, etc). These rows will be about 2 rows tall, so the selected items can be shown without taking up to much vertical space.

- (checkbox).
- Qty (This will have a up and down arrows)
- Item Number
- Description
- List Price
- Your Price
- Extended Price

Upper Footer (above the Lower Footer)

- Notes (large field that is about 1 inch tall that spans 2/4 of the width
- SubTotal (Right had side in the top row)
- Freight (Right had side below SubTotal)
- Taxes (Right had side below Freight)
- Total (Right had side below Taxes)

Lower Footer

- Remove Selected (blue button in bottom left corner).
- Save as Quote (blue button in center)
- Start New Order
- Proceed to Checkout (green button in bottom right corner, below the totals).

Finding Parts, Prices & Availability

- Finding Items. Search for the Item in a hierarchal way, and stop searching as soon as you find the item.
    - Item table: Try to match the Item #, OEM# (with or without dashes), AltItem1, AltItem2, UPCCode, etc
    - ItemCrossReference table.
    - ItemVendor table.
- Pricing Parts
- Determining the EstimatedDeliveryDate

Checkout screen

Section: Deliver To

Section: Paying With

Section: Shipping Cart (line items)

Footer

- Button: Continue Shopping
- Button: Cancel / Start Over
- Button: Submit Order

Submit Order button Logic

- Needs to Create Order
- Create Line Items
    - IN STOCK: If we have the item in local warehouse and we have enough then we create the line item and change the QTY and QTY SHIPPED to the Order Qty and reduce the inventory. We then change the STATUS of the line item to the 'Next Status' after the 'New' Status (based on the Warehouse settings defined by the user).
    - TRANSFERRED:
        - (Not 100% sure...) We need to TEST what happens when we select an Item NOT in local WH but IS IN OTHER WH, how does it work in relation to shipping the item out of stock? And Creating a Stock Transfer? And Setting the Line Item Status?
        - Create a Stock Transfer
        - Change the Sales Order Status to the 'NEXT' Status.
        -

Return Part(s)

Title: Return Part(s)

Header

(Show the Return Policy text entered by the user in the Return Policy Text (field) in the Portal Settings screen).

Body

Search for Part: ____________________ Search for Invoice: ____________________

X	Invoice #	Item #	Item Description	Qty On Invoice	Qty to Return	Reason (drop down list-- Reason Code | Description	Additional Notes	Header 7
	1235	X123	08 Honda Accord Front Bumper	2	1	DMF		
	1235	X111	09 Honda Accord Rear Bumper	1				

- By default the body will have NO line items. When the Customer searches for a Part or Invoice # then we will return those records only.
- Lock the X. Make the user fill in the Qty and the Reason to make the X get checked.
- Make the Qty to Return, Reason, and the Additional Notes fields be part of the Tab order. (Lock all other fields). Add Arrow up and down options.
- If a Reason is selected without a Qty give this message: Msg: 'Please enter the Qty to Return first.' (then set focus on the Qty to Return). (And unselect the X)
- If the Reason selected has a NumDays setting for that Reason (in the Settings) then give this popup (and unselect the X): Title: Part Cannot Be Returned. Msg: 'Based on the Reason that you have selected you can only return the part within x days from the Date of the Invoice.'
- If the user selects another part or invoice to search for we will retain the previously selected parts only.

Footer

- **Submit Selected Parts To Return** buttton (green)
  - When pressed this will create a new Credit Memo for the customer for the selected parts. Set the Credit Memo status = To Dispatch.

Sales History

Overview

The Portal Lists will give our Customer's Customers a way to see their own Quotes, Sales Orders, Invoices & Credits, Payments, and Returns

Customer Portal Lists

These are the types of Lists we will put on the Customer Portal:

- Quotes
- Sales Orders
- Invoices & Credits
- Payments
- Returns

Common Features

- The lists will look and work much almost identical to the OneSource List screens.
- No Upload option will be provided (but the Download option will remain).
- A single click on any of the transactions on any of the lists will OPEN that transaction in a new tab.
- Transactions will NOT display a 'drop down' Customer Selection list.
- Transactions will NOT be editable or delete-able, except where stated otherwise.

Unique Features

Quotes

Sales Orders

Invoices & Credits

Payments

Returns

Portal Settings (LOCATED in the Settings > Customer Portal)

This screen will be a 'Tab' in the Settings (located under the Sales tab) called Customer Portal. The Customer Portal tab will have these sub tabs:

- General
- Layout
- Settings
- Shipping
- Payments
- Users
- Reports

Sub-Tab: General

Portal Features

The OneSource Customer Portal provides a way for YOUR customers to login into a 'limited' version of OneSource to perform these functions:

- Search for parts. Check stock and pricing (including the 'List' price and the 'Your Price' based on each customer's unique pricing settings)
- Place Orders (that appear in OneSource).
- Check Order Status.
- Save Quotes. Convert Quotes to Orders.
- Make Invoice Payments
- Request Part Returns
- View searchable and sortable lists of Quotes, Sales Orders, Invoices, Credits, Returns
- Create and view Support Tickets

Other Frequently Asked Questions:

- Which customers can use it? Any customer you send an invite to from within OneSource.
- How many customers can use it? Unlimited.
- Can I disable a customer login? Yes. Just lookup the customer in OneSource, click on the Customer Portal tab, and click Disable Customer Portal.
- Can customers view any information NOT related to them? No. They can only view the types of information you select in the Portal Settings--that is related exclusively to them.

- How long does it take to set up? A few days as we have to create a unique URL for your customers to use, such as yourcompany.osqbo.com
- What does it cost to setup and use? $300/month

Portal Activation

(GREEN BUTTON) Activate Portal Now (When the user clicks the Portal Enabled button we need to popup a FORM that has these features:
(BLUE BUTTON) Deactivate Portal Now (Give this pop up message

Title: Portal Activation Request Form

This is the OneSource Customer Portal Activation form. To Activate the Portal please fill in the fields below and then click the Activate Now button.

Your Name: _______________________________

Your Email: _______________________________

The Best Phone # to Reach You: _________________

Preferred Portal Login Name: _____.osqbo.com

[ ] I understand that the fee to use the Portal is $300/month, and that I can discontinue the service at any time, for any reason.

NOTE: After you press the **Activate Now** button you can begin inviting your Customers to use the Customer Portal by setting up and inviting one or more Portal Users on the Customer Portal tab on each Customer record.

(Additional DEV NOTES)
When the portal activation process is completed by the customer we will set the CustomerPortal = True.
When the Deactivate Portal Now button is clicked we will set the CustomerPortal = False

Sub-Tab: Layout

- Logo for Portal Sign In Screen.
- Logo for Portal (top left corner).

Sub-Tab: Settings

Section: General Info

Your Name: _______________________________

Your Email: _______________________________

The Best Phone # to Reach You: _________________

Preferred Portal Login Name: _____.osqbo.com

Section: Category & Search

[ ] Vin # (Visible but Disabled for now)

[ ] Item Number
[ ] Year
[ ] Make
[ ] Model
[ ] Category
[ ] Sub Category

Sub-Tab: Shipping

Sub-Tab: Payments

Sub-Tab: Manage Users

- Customer Portal New Sign Ups to Link & Approve
  - Approve All Matched Companies (Button)
    - When clicked will look for the selected Template to email to all users that have a Company in the Select Company Name column.
      - When Users are IMPORTED, or when a user signs up on the Portal home screen, the Select Company Name will be auto filled if the EMAIL matches.
  - Import List of Portal Users
    - Using the Export Template, when the Customer list if imported it will follow this logic to PRE-VALIDATE (make sure the email doesn't already exist):
      - First try to find the email in the 1place osCompanyMaster!Users table.
        - If found, we will reject the new account creation (and will show the user in the error at the end of the process)
      - If necessary, next try to find the email in CustomerPortalSignUp table.
        - If found, we will reject...
    - If the Pre-Validation passes (email not already in use), then
      - Check to see if the **CustomerID (Customer Number)** in the file is already in 1place.
        - If so, is the email already in use in the CustmerContact table (related to the customer)?
          - If so, then we will allow and create a login.
        - If not, then we will create a login using the email from the file, and link to the Customer ID (Customer Number) provided.
- Customer Portal Logins

Sub-Tab: Reports

How to Login Page Logo

(Notes from PK to Steve via email 3/23/22)

Demo server credentials
osdemo1.eastus.cloudapp.azure.com
Username : osoTeam
Password : OSDevTeam@5678

To change the login page logo, you need to update the company logo on company master virtual machine. Use below credentials to login to company master server

oscompanymaster.eastus.cloudapp.azure.com

Username : osoadmin
Password : adMinPasWrd@202O

1. Log in to oscompanymaster virtual machine

2. Goto the folder F:\Production_HOSTING\Login\Content

3. Create the folder with your company name

    1. We already created a folder for "anaheimcollision"

4. Change the company logo name to Logo.png and put the logo in your company folder.

5. Ener the url like Companyname.1place.cloud

    1. https://anaheimcollision.1place.cloud/

Check the below image for your reference

Big Picture of How User Security is Managed in Portal

When Customer Signs Up on Portal Home Screen

- • Our customer's customers can access the **Portal Home Page** and enter their details such as **First Name, Last Name, Email ID, and Password** during signup.
- Once the signup is completed, the entered details are saved in the **CustomerPortalSignups** table.
- All signup requests are listed under **Settings → Customer Portal → Manage User**.
- From this screen, we select the respective customer from the dropdown and click **Approve**.
- During approval:
    - The user details are inserted into the **CustomerPortalUsers** table.
    - The user is also created in the **Company Master Users** table.
    - The generated **UserId** is returned and updated in the **CustomerPortalUsers** table.
    - When the user logs in using their **email and password**:
- When the user logs in using their **email and password**:
    - The system first validates the credentials in the **Users** table.
    - After validation, it checks the **CustomerPortalUsers** table to confirm the user is linked to the correct customer and has portal access.
    - If no record exists in **CustomerPortalUsers**, or if the user is disabled, the user will not be able to log in or access the portal.

When Customer is Manually Added (to the Portal tab) by a 1place User

- • If our customer enters user details such as **Username and Email** under **Customers → Customer Details → Customer Portal → Portal User Table**, the data is directly saved in the **CustomerPortalUsers** and **CompanyMaster Users** table.
- After adding the user details, clicking **Send Invite** will initiate the portal activation process for the user.
- Before clicking **Send Invite**, an **Email Template** must be created under:**Settings → Customer Portal → Other Settings**.
- The created template must:
- Be selected in the appropriate field.
- Contain the **base URL of the portal** (example: `XXX.1place.cloud`).
- Once **Send Invite** is clicked:

- An email is sent to the user with a **portal activation URL**.
    - The user clicks the link and is redirected to the **Create Password** page.
- The user then:
    - Sets their password.
    - Clicks **Sign In**, which acts as a **one-step sign-in process**.
- After password creation:
    - The user's **Password** are updated into the **Company Master Users** table
- During future logins:
    - The system first validates the **Email and Password** against the **Company Master Users** table.
    - Then it verifies access in the **CustomerPortalUsers** table to ensure the user belongs to the correct customer and has portal access.
- **Note :**
    - Portal users cannot delete their own accounts.
    - Only our **customers (admin users)** have permission to delete or disable a portal user.
    - When a customer deletes a portal user:
        - The user record is first deleted from the **Company Master Users** table.
        - Then the corresponding record is removed from the **CustomerPortalUsers** table.
        - Finally, the entry is also deleted from the **CustomerPortalSignups** table.

OLD ====================== Settings (Copied From Another KBA, May Be Some Duplication...) ==============================

This screen will be a 'Tab' in the Settings (located under the Sales tab) called Customer Portal. The Customer Portal tab will have these sub tabs:

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(Additional DEV NOTES)
When the portal activation process is completed by the customer we will set the CustomerPortal = True.
When the Deactivate Portal Now button is clicked we will set the CustomerPortal = False

Sub-Tab: Layout

This is an example of the Portal LOGIN screen for our OLD OneSource Portal:

We need to create settings (on the Settings > Portal > Layout tab) that has these settings:

- TOP LEFT Company Logo area. (Upload Logo...)
  - Logo
  - Company and Address Text (with ability to pick text font, size, color)
- BOTTOM LEFT area.
  - Picture (upload)
  - Text.
  - Ability to define the size of the picture. (the remaining area for text will be whatever is left over).

- RIGHT SIDE
    - FIXED Design:
        - Email / Login field
        - Password field
        - Login button (Green)
        - Forgot Password (Link).
        - Company
        - First Name
        - Last Name
        - Street
        - City
        - State
        - Zip/Postal Code
        - Phone
        - Email / Login
        - Password
        - Confirm Password
        - Submit (button)
    - USER DEFINED:
        - New User Note:
        - Picture in Bottom Right
        - Text in Bottom Right (with ability to pick text font, size, color)
    - Background Color (entire screen background) (color picker)
    - Background Color (top half of configurable area)
    - Background Color (bottom half of configurable area)
    - Background Color (box behind login screen)
    - Background Color (area behind all user entry fields)
- FIXED Design:
    - Email / Login field
    - Password field
    - Login button (Green)
    - Forgot Password (Link).
    - Company
    - First Name
    - Last Name
    - Street
    - City
    - State
    - Zip/Postal Code
    - Phone
    - Email / Login
    - Password
    - Confirm Password
    - Submit (button)
- Section called: View Design
    - (This would show the user how it will look on the same screen, below the settings).

Sub-Tab: Settings

Section: General Info

Your Name: ______________________________

Your Email: ______________________________

The Best Phone # to Reach You: _________________

Preferred Portal Login Name: _____.osqbo.com

Section: Category & Search

[ ] Vin # (Visible but Disabled for now)
[ ] Item Number
[ ] Year
[ ] Make
[ ] Model
[ ] Category
[ ] Sub Category

Sub-Tab: Application Settings

➡Find Parts Fields/Columns (List screen)

Action	Active	Field Name	Field Description
	[ ]	Picture	This will show the picture of item, if available.
[Icon that can be dragged to re-order the fields...]	[ ]	Item #	This is the item #.
	[ ]	Ind #	This is the Alt1 field where the PartsLink or DPI # is stored.
		OEM #	This is the Original Equipment Manufacturer #.
		Item Description	
		List Price	
		Your Price	
		Qty in Stock	
		Qty to Buy	
		Extended Price	

➡Find Parts Fields/Columns (Detail Screen)

Item Detail Popup Screen - Picture Pane (Left Side)

Action	Active	Field Name	Field Description
	[ ]	Picture	This will show the picture of item, if available.
[Icon that can be dragged to re-order the fields...]	[ ]	Item #	This is the item #.
	[ ]	Ind #	This is the Alt1 field where the PartsLink or DPI # is stored.
		OEM #	This is the Original Equipment Manufacturer #.
		Item Description	
		List Price	
		Your Price	
		Qty in Stock	
		Qty to Buy	
		Extended Price	

Item Detail Popup Screen - Additional Info (Center)

Action	Active	Field Name	Field Description
	[ ]	Picture	This will show the picture of item, if available.
[Icon that can be dragged to re-order the fields...]	[ ]	Item #	This is the item #.
	[ ]	Ind #	This is the Alt1 field where the PartsLink or DPI # is stored.
		OEM #	This is the Original Equipment Manufacturer #.
		Item Description	
		List Price	
		Your Price	

		Qty in Stock	
		Qty to Buy	
		Extended Price	

Item Detail Popup Screen - Qty & Price Info (Right Side)

Action	Active	Field Name	Field Description
	[ ]	Picture	This will show the picture of item, if available.
[Icon that can be dragged to re-order the fields...]	[ ]	Item #	This is the item #.
	[ ]	Ind #	This is the Alt1 field where the PartsLink or DPI # is stored.
		OEM #	This is the Original Equipment Manufacturer #.
		Item Description	
		List Price	
		Your Price	
		Qty in Stock	
		Qty to Buy	
		Extended Price	

➡Find Parts Screen Behavior: Description - Current Value

- (CHANGE) Number of parts that display on a single page on the Find Parts screen - [x value, such as 50]
    - Add a setting on the Portal Find Parts screen, under the list of displayed line items, called: Show [# of records: 10, 20, 50, 100, ALL]
- (CHANGE) Find Parts screen default Sort Order - [Drop down list: Item #, OEM#, Alt1 (PartsLink#))
    - Just sort it by the Item # field by default.
- (CHANGE) Text Search How the Text Search behaves on the Find Parts screen: 'Individual' sets it to search for each word individually, 'Together' sets it to search for the entire string - [Together]
    - Do not have a setting for this. Just make it work intuitively like Google search works.
    - Example 1: Honda Accord
        - Then search for 'Honda Accord',
        - Also search for 'Honda' or 'Accord'
- Default screen to display: [drop down list: Find Parts, Dashboard]
- Show Hover for stock in addition to Hover for Price - [Yes]

➡Inventory Item Display: Description - Current Value

- [ ] Display Estimated Delivery Date.
- Cut off time for new Orders to deliver the part on the SAME DAY: ____________ (All items ordered after the Cutoff time will show an Estimated Delivery Date for the next business Day).
- Text to display for Estimated Delivery Date if the item is not currently in stock: __________
- Number of days to ADD to the delivery date if the item is in another warehouse: _________
- How to display inventory in stock (if the column is visible): [DROP DOWN LIST: Show Actual Qty, Show Qty of 1, Show 'In Stock')
- [ ] Hide items on the Find Parts screen if they have a price of $0.00.
- [ ] If List Price is displayed, only display list price if an item is out of stock.
- (HOLD) Use the Interchange # field for certification icon displays.

➡Sales Orders: Description - Current Value

- Salesperson name that will be inserted for all Customer Portal Orders, if no Salesperson is defined on the Customer record: [Drop down list]. (NOTE: If this field is left blank 'Customer Portal' will be inserted).
- (HOLD: We will create a number of settings on the WAREHOUSE screen that will define WHICH warehouses will be included in the Qty available to sell and the # of additional days to add if items are ordered from another Warehouse - Depending on which warehouse the Customer it assigned to).
- (HOLD) [ ] Allow customers to request returns.
- Automatically credit customer account when they request a return. - [No]
- Override returns to only send an email notice. - [Yes]

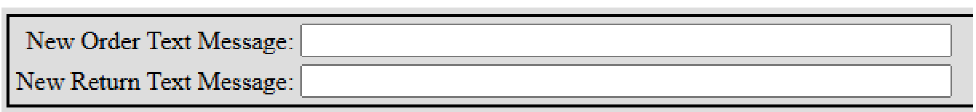
➡User Checks and Warnings: Description - Current Value

- Display a message if the user has any overdue invoices on the welcome screen. - [No]
- Message to display if the user is overdue. Use *overdue* to display the amount they are overdue. - [You are over due by *overdue*]
- Display a message if the current order will put your user over their credit limit on the quote screen. - [No]
- Message to display if the purchase could put the user over their credit limit. Use *credit* to display the amount they could go over their credit by. - [WARNING: This purchase could put you over your credit limit by *credit*]
- Stop customer from ordering if over credit limit. - [No]
- IP Addresses to block. Enter multiple separated with a comma. - [None]
- If you have PDF statements on your server entere the location here and users will be able to download their statements. "None" to not show statements. - [None]

Sub-Tab: Notification Settings

➡General Email Notifications - Each entry can have mutliple emails, seperated by a comma (email1@site.com,email2@site.com)

➡Text Message Notifications - You may additionally send a text message, to a cell phone(s) of your choice, when a new order is placed. Contact your cell phone provider to obtain the email address that will send a text message to your phone. For example: Verizon is usually something like 5556667777@vtext.com.



➡Warehouse Specific Email Notifications - You can email different people depending on the ordering customers "DefaultWarehouse" setting. If we do not find a matching "DefaultWarehouse", for the customer, we will default to the above General settings. We support up to 5 separate warehouses.

Sub-Tab: Payments

Sub-Tab: Manage Users

(enter design needs here)

3 types of Sign-ups

1. We invite, existing customer, from inside of 1place > customer record > customer portal tab

2. We send an email with the URL (NOT FROM 1place) to a list of existing customers in 1place.

3. A NEW company, we do not have in 1place, finds customer website, which refers them to the new portal sign-up, and they sign up.

Sub-Tab: Manage Users (Code from Thiru that shows how to FIND a list of Users that DID sign up but did NOT enter a Password..)

Execute the Company Master query first to retrieve the User IDs as a comma-separated, single-quoted list.

```
SELECT STRING_AGG('''' + CAST(u.UserId AS VARCHAR(50)) + '''', ',') AS UserIds
FROM Users u
JOIN CompanyMapping CM
ON CM.UserID = u.UserId
AND CM.CompanyID = 4387
WHERE u.IsActive = 1
AND (u.Password IS NULL OR u.Password = '')
```

Copy the returned User IDs and paste them into the IN clause of the Florida Server query below.

Florida Server Query:

```
UPDATE CustomerPortalUsers
SET Status = '1',
ApprovedBy = '', ApprovedAt = NULL
WHERE UserID IN (Please enter the User IDs from the Company Master query)
```

Sub-Tab: Guest Account Settings (WE DO NOT SUPPORT THIS YET...)

The guest account allows users to login and view pricing without being able to place an order.

Sub-Tab: Reports

- Quotes Submitted Summary for all users by Company
- Quotes Submitted Summary for all users by Logins
- Quotes Submitted Summary for all users by Orders Submitted
- Active Customers List
- Pending Customers List

- Admin Users List
- Application Settings
- Usage by IP Address

OLD SYSTEM: Screen Shots and notes from the Original OneSource Online Orders (osOO) (for Reference Purposes only)

Login Screen

Admin Screen - New / Active Users

Admin Screen - Application Settings (2 parts)

Admin Screen - Notification Settings

Admin Screen - Search Settings

Admin Screen - Guest Account

Admin Screen - New / Active Users

Admin Screen - New / Active Users

Admin Screen - Update Inventory

Admin Screen - View Reports

Admin Screen - Add User

How to Setup DNS settings to make the PORTAL more Custom to Our Customer's Own URL

NOTES FROM PK

Hi Steve,

Please follow the steps below to add new records to your DNS settings:

Steps to Add DNS Records:

1. Log in to the portal where you purchased your domain.

2. Navigate to the **DNS Settings** section for your domain.

3. Add the following **two A records** to your DNS:

Record 1

- **Type:** A
- **Name:** portal
- **IP Address:** 40.88.15.109
- **TTL:** 600 seconds

Record 2

- **Type:** A
- **Name:** portal-tx
- **IP Address:** 52.168.181.42
- **TTL:** 600 seconds

SSL Certificate:

If you have purchased a wildcard SSL certificate from your domain provider, please share the certificate files with us. We will install them on our server accordingly.

Use the below image for your reference

Thanks

PK

MORE NOTES:

Step 1: Open Domain Registrar (Cloudflare.com > open the DOMAIN > DNS settings)

Step 2:

Add new 'A' record

Type = A

Name = portal

Data (IP address) 40.88.15.109

TTL = 600 Seconds

Step 3:

Add new 'A' record

Type = A

Name = portal-tx

Data (IP address) 20.36.138.217 (KSI's VM IP address for Texas Region)

TTL = 600 Seconds

Step 4: KSI to purchase *.ksicollision.com SLL Cert.(Buy a 5 year plan)

Step 5:

KSI will install SSL Cert on THEIR www.ksicollision.com on their web server.

KSI will create bindings on that server called: www.ksicollision.com

Step 6:

OneSource to download and install SSL cert (on OUR Company Master server) for ssl wildcard *.ksicollision.com

we will install on OUR COMPANY MASTER

we will create bindings called: portal.ksicollision.com on Company Master

we will create bindings called: portal-tx.ksicollision.com on KSI TX VM

Step 7: Repeat step 6 for each new KSI Region/VM

Step 8: Update (re-install) the *.ksicollision.com SSL at the end of each year, when it expires.

MORE NOTES:

KSI Azure > DNS Zone...

Add ksicollision.com

Copy the 4 name servers to their Domain Registrar for ksicollision.com DNS Nameservers.

on KSI Azure > DNS zones, add an A record with * for the address...

On OUR Company Master VM, we will add another Binding called portal.tx.ksicollision.com