

Capture Purchase Order number

Vendor Agnostic feature

Stream**One**[®] *lon*

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Reasons for Change

Before this release, there was no method in place to capture a Reseller's or End Customer's Purchase Order number in the StreamOne Ion platform. This enhancement will correct the situation, allowing Resellers the ability to associate an End Customer Purchase Order number and/or Reseller Purchase Order number to a customer's subscription in an effort to reconcile their finances.

Scope

- This feature is vendor agnostic.
- This document only covers Customer 360 experience in the StreamOne Ion platform but not the end customer Marketplace experience.

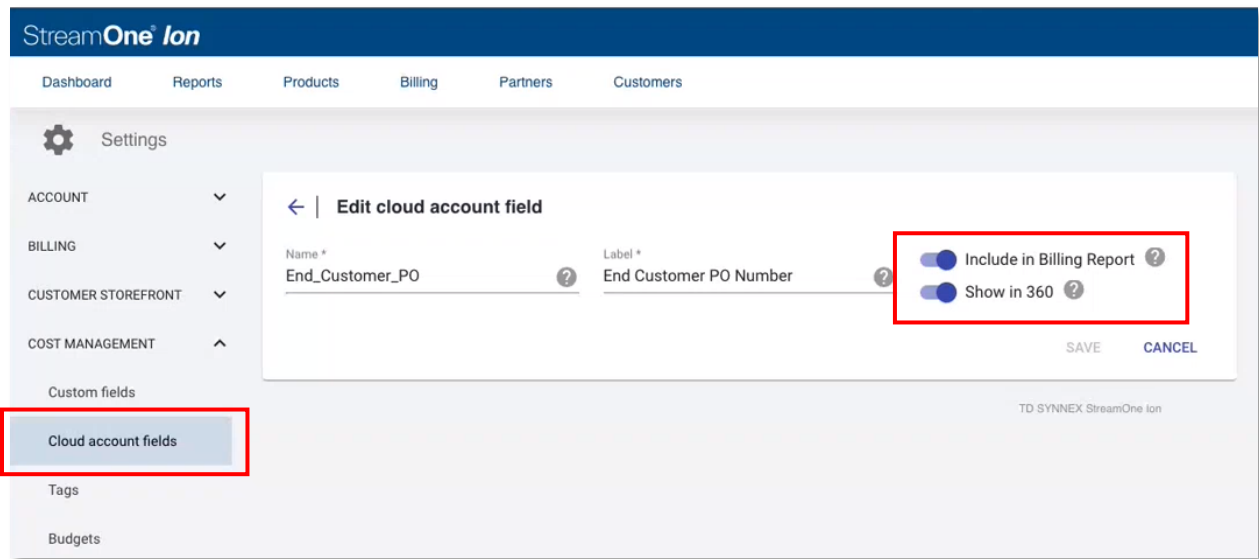
User Journey

This document describes the impact that changes have in different sections of the StreamOne Ion platform, and the experience users will have.

Controls

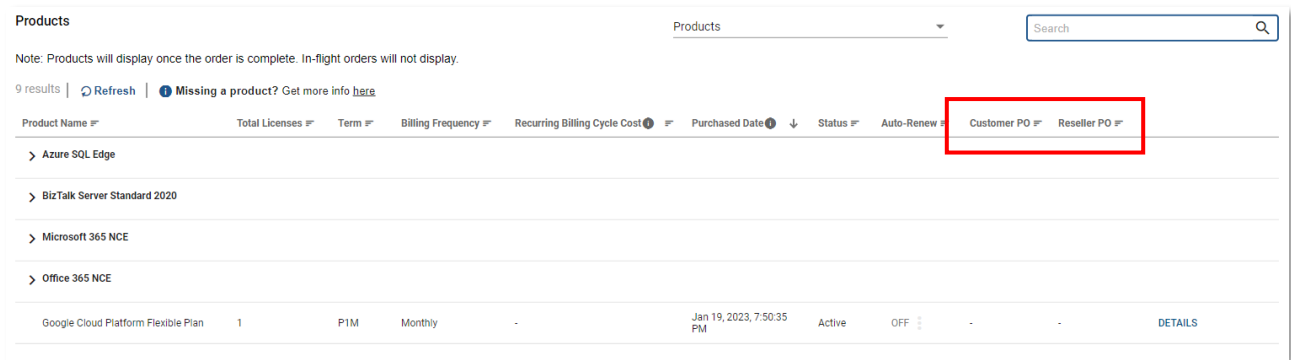
A new toggle is now available in the configuration of Cloud Account Fields to control whether or not the fields are displayed in the Manage Product Table in Customer 360.

Purchase Order Numbers are cloud account custom fields and can be configured under Settings -> Cost Management -> Cloud account fields:



Users will be able to edit any Cloud account field and see the two available toggles. “Include in Billing Report” already existed and influences whether the cloud account fields are shown in the billing exports.

The new toggle, “Show in 360”, controls whether or not the fields are displayed. When turned OFF, Purchase Order number related data will not be shown in the Manage Product Table in Customer 360. If the toggle is turned ON, then new columns will be dynamically added to the Customer 360 view that shows the related field data:

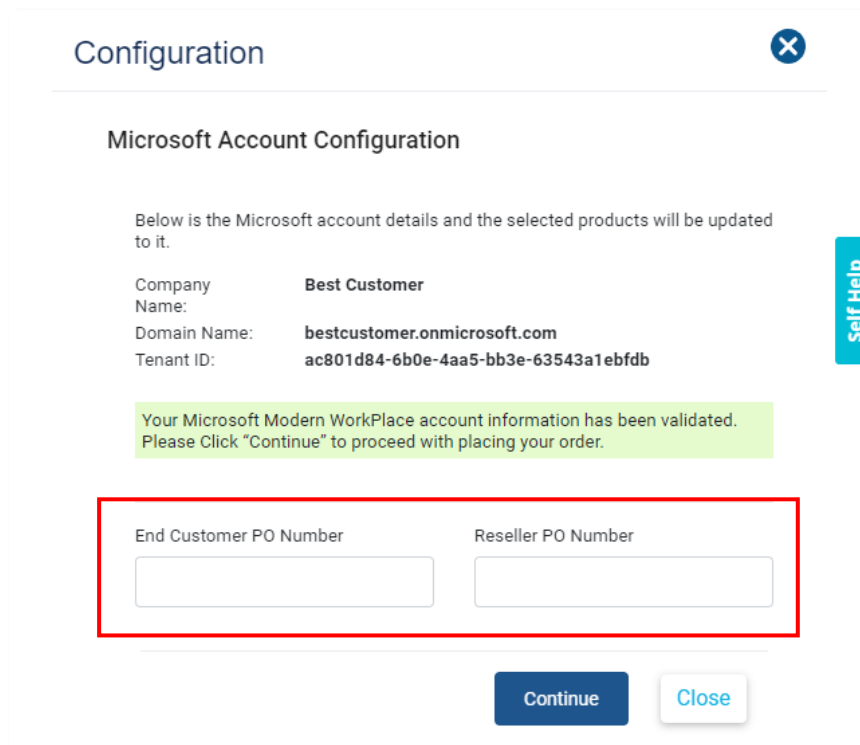
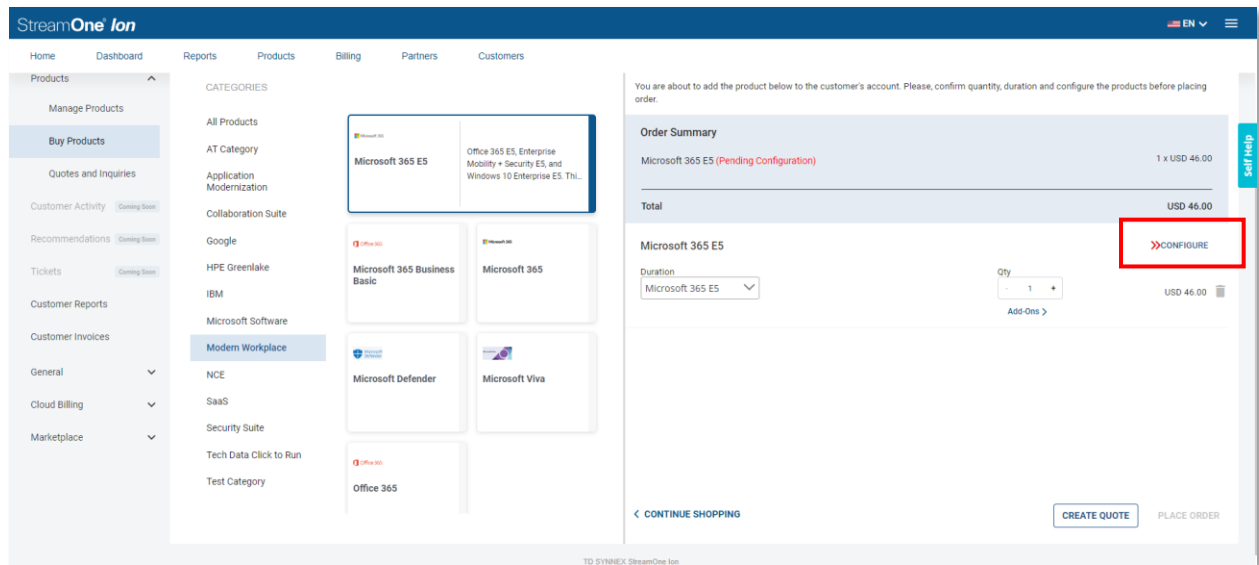


Product Name	Total Licenses	Term	Billing Frequency	Recurring Billing Cycle Cost	Purchased Date	Status	Auto-Renew	Customer PO	Reseller PO
Azure SQL Edge									
BizTalk Server Standard 2020									
Microsoft 365 NCE									
Office 365 NCE									
Google Cloud Platform Flexible Plan	1	P1M	Monthly	-	Jan 19, 2023, 7:50:35 PM	Active	OFF	-	-

Buying experience

The new feature will be available when a user buys a product.

After having a product added to the shopping cart, when the user presses the “Configure” option, the two new fields are shown. Each field is limited to 50 characters, not mandatory and no additional validation or logic will be applied to them:

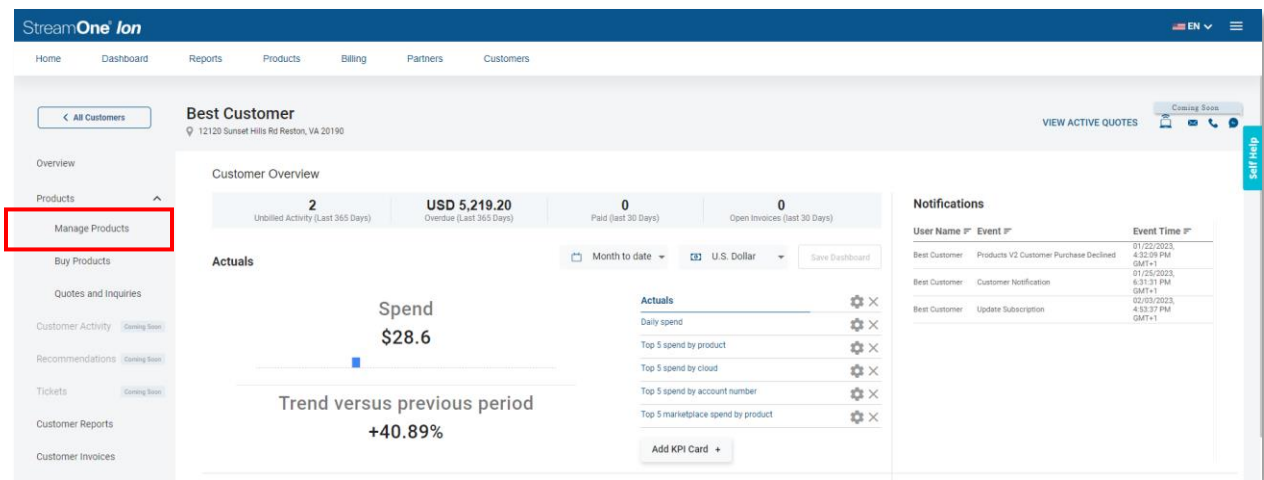


When the Purchase Order number fields are populated while purchasing a subscription, they will automatically be added to the Cloud Custom Fields, so manual adding the fields for each account is not required.

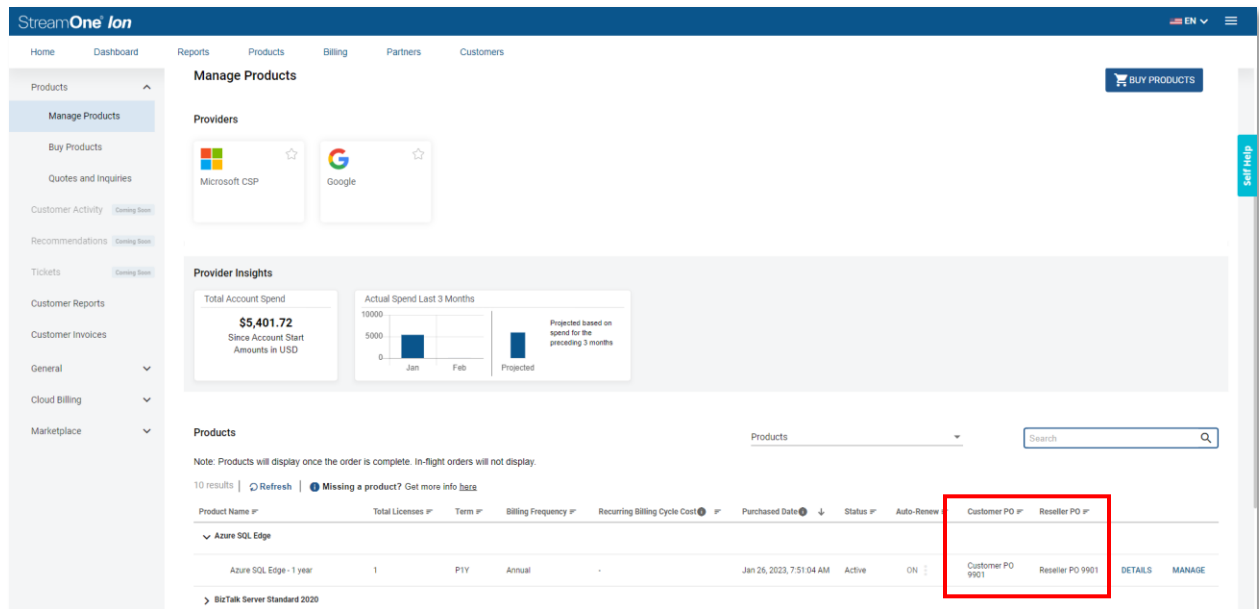
Note: The End Customer Purchase Order number and Reseller Purchase Order number fields will not be shown for Azure Reservations products, but users will still be able to add/edit a Purchase Order numbers for Reservations through Lifecycle Management.

Manage Products

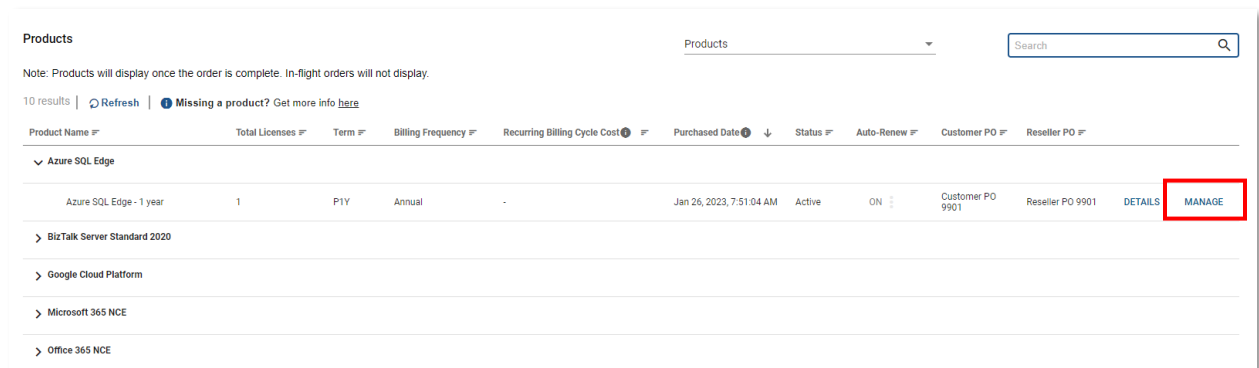
Users will be able to view and modify Purchase Order number field related data in the Manage Products section:




Two new columns have been added to the Products Table with the Customer Purchase Order number and Reseller Purchase Order number fields and its corresponding data:



To edit the values on the Customer Purchase Order number and Reseller Purchase Order number fields press the “MANAGE” option on the product line:



A new window will pop up with the Order description, press the “Edit” button to continue:

 | Microsoft CSP ×

Please log into your [Microsoft Admin Center](#) account to access your product keys and to download your products.

Please Note: Orders can only be cancelled within 7 days from the purchase date.

Order ID	Purchase Date	Friendly Name	Expiration Date	
cdc06a9b3b7b	1/26/2023	Azure SQL Edge	1/25/2024	Edit

Self Help

Close Window

The End Customer Purchase Order number and Reseller Purchase Order number fields are visible on the bottom of the Edit Order page and new values can be entered that will overwrite any previous value:

To see the changes reflected on the Products Table, users need to press the refresh button or wait one hour for the system to refresh automatically:

Products

Products

Search

Note: Products will display once the order is complete. In-flight orders will not display.

10 results [Refresh](#) [Missing a product? Get more info here](#)

Product Name	Total Licenses	Term	Billing Frequency	Recurring Billing Cycle Cost	Purchased Date	Status	Auto-Renew	Customer PO	Reseller PO	
<div> <div> <div></div> <div>Azure SQL Edge</div> </div> <div> <div>Azure SQL Edge - 1 year</div> <div>1</div> <div>PIV</div> <div>Annual</div> <div>-</div> <div>Jan 26, 2023, 7:51:04 AM</div> <div>Active</div> <div>ON</div> <div>EC PO 123</div> <div>RE PO 456</div> <div> DETAILS MANAGE </div> </div> </div>										
<div> <div></div> <div>BizTalk Server Standard 2020</div> </div>										
<div> <div></div> <div>Google Cloud Platform</div> </div>										
<div> <div></div> <div>Microsoft 365 NCE</div> </div>										
<div> <div></div> <div>Office 365 NCE</div> </div>										


The same can be done for existing subscriptions that did not previously have any Purchase Order number information associated to it using the “MANAGE” option:

Products Products

Note: Products will display once the order is complete. In-flight orders will not display.

10 results | [Refresh](#) | [Missing a product? Get more info here](#)

Product Name	Total Licenses	Term	Billing Frequency	Recurring Billing Cycle Cost	Purchased Date	Status	Auto-Renew	Customer PO	Reseller PO		
▼ Azure SQL Edge											
Azure SQL Edge - 1 year	1	P1Y	Annual	-	Jan 26, 2023, 7:51:04 AM	Active	ON	EC PO 123	RE PO 456	DETAILS	MANAGE
▶ BizTalk Server Standard 2020											
▶ Google Cloud Platform											
▼ Microsoft 365 NCE											
Microsoft 365 Apps for business	2	P1M	Monthly	\$16.60	Jan 10, 2023, 4:36:49 AM	Active	ON	po number	77777	DETAILS	MANAGE
Microsoft 365 Business Basic	2	P1M	Monthly	-	Jan 22, 2023, 5:47:00 PM	Suspended	OFF	Krishna 3	Govinda 3	DETAILS	MANAGE



Microsoft CSP

Manage Provider

Modify Subscription

Users and Licenses

Manage Renewal


Upgrade

Pause

Cancel

Auto Renew

Self Help

 Microsoft CSP

Modify Subscription

Product Name: **Microsoft 365 Apps for business**
 Plan Name: **Monthly**
 Subscription Status: **Active**

Make your selections and click on the "Update" button to update your subscription(s).

Quantity

Status
☒ Active
☐ Suspended

End Customer PO Number

Reseller PO Number

Update

Close Window

Users will be able to use the search box to narrow the results to show records that contain data that matches the related search:

Products

Products

EC PO 123

Note: Products will display once the order is complete. In-flight orders will not display.

1 results | [Refresh](#) | [Missing a product? Get more info here](#)

Product Name	Total Licenses	Term	Billing Frequency	Recurring Billing Cycle Cost	Purchased Date	Status	Auto-Renew	Customer PO	Reseller PO
<div>Azure SQL Edge</div>									
Azure SQL Edge - 1 year	1	PT1Y	Annual	-	Jan 26, 2023, 7:51:04 AM	Active	ON	EC PO 123	RE PO 456

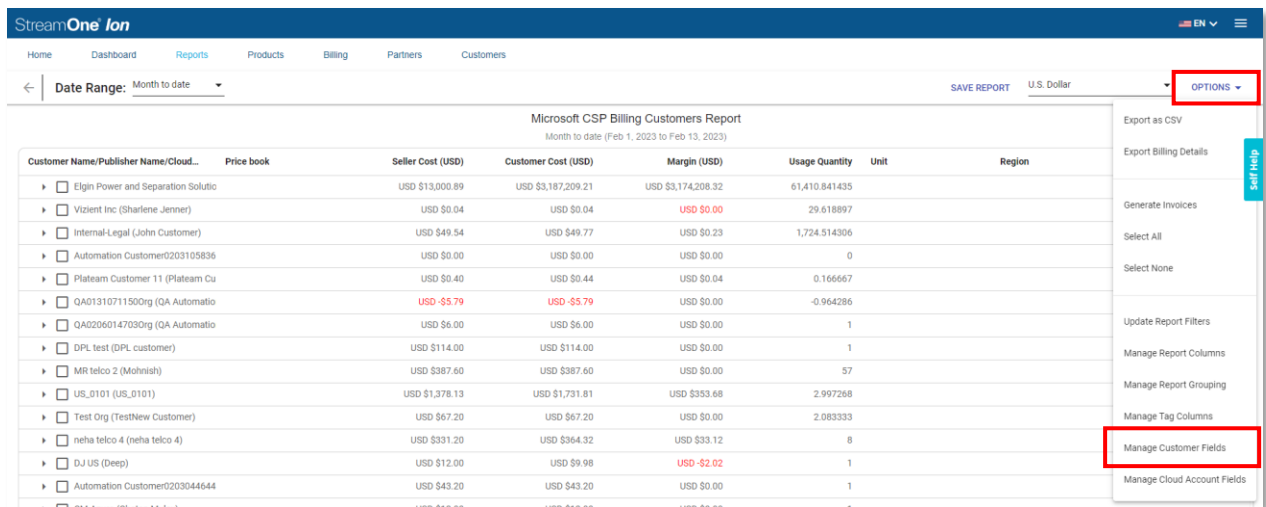
Reports

The Customer Purchase Order number and Reseller Purchase Order number fields will be available to use in any of the available reports.

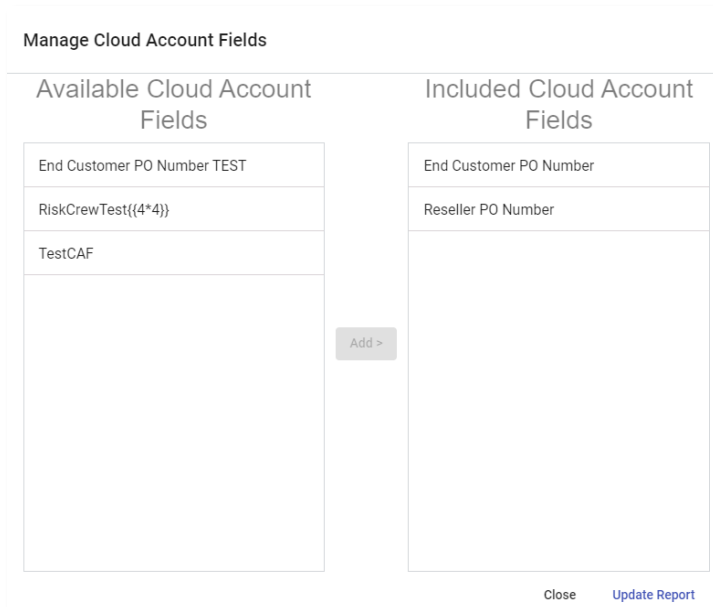
The frequency in which Reports are updated is tied to the logics of each vendor and how frequently StreamOne Ion is programmatically importing data from their systems.

Only when the reports are updated will the latest Purchase Order related data be reflected in the report.

Users will first have to add the Cloud Account fields using the “OPTIONS” menu inside the report page and select the desired fields in the “Manage Cloud Account Fields” window:



The screenshot shows the StreamOne Ion interface. The top navigation bar includes Home, Dashboard, Reports, Products, Billing, Partners, and Customers. The 'Reports' section is active, displaying the 'Microsoft CSP Billing Customers Report' for the date range 'Month to date (Feb 1, 2023 to Feb 13, 2023)'. The report table has columns: Customer Name/Publisher Name/Cloud..., Price book, Seller Cost (USD), Customer Cost (USD), Margin (USD), Usage Quantity, Unit, and Region. The 'OPTIONS' menu is open, showing options like 'Export as CSV', 'Export Billing Details', 'Generate Invoices', 'Select All', 'Select None', 'Update Report Filters', 'Manage Report Columns', 'Manage Report Grouping', 'Manage Tag Columns', 'Manage Customer Fields' (highlighted), and 'Manage Cloud Account Fields'.



The 'Manage Cloud Account Fields' dialog box is shown. It has two main sections: 'Available Cloud Account Fields' and 'Included Cloud Account Fields'. The 'Available' section contains a list of fields: 'End Customer PO Number TEST', 'RiskCrewTest{{4*4}}', and 'TestCAF'. The 'Included' section contains a list of fields: 'End Customer PO Number' and 'Reseller PO Number'. An 'Add >' button is located between the two sections. At the bottom, there are 'Close' and 'Update Report' buttons.

Once this is completed, those specific fields will be shown in the list of available columns and can be added using the “Mange Report Columns” menu under “OPTIONS”:

StreamOne **ion** EN

Home Dashboard **Reports** Products Billing Partners Customers

Date Range: Month to date SAVE REPORT U.S. Dollar OPTIONS

Microsoft CSP Billing Customers Report
Month to date (Feb 1, 2023 to Feb 13, 2023)

Customer Name/Publisher Name/Cloud...	Price book	Seller Cost (USD)	Customer Cost (USD)	Margin (USD)	Usage Quantity	Unit	Region
<input type="checkbox"/> Elgin Power and Separation Solutio		USD \$13,000.89	USD \$3,187,209.21	USD \$3,174,208.32	61,410.841435		
<input type="checkbox"/> Vizient Inc (Sharlene Jenner)		USD \$0.04	USD \$0.04	USD \$0.00	29.618897		
<input type="checkbox"/> Internal-Legal (John Customer)		USD \$49.54	USD \$49.77	USD \$0.23	1,724.514306		
<input type="checkbox"/> Automation Customer0203105836		USD \$0.00	USD \$0.00	USD \$0.00	0		
<input type="checkbox"/> Plateam Customer 11 (Plateam Cu		USD \$0.40	USD \$0.44	USD \$0.04	0.166667		
<input type="checkbox"/> QA01310711500org (QA Automatio		USD -\$5.79	USD -\$5.79	USD \$0.00	-0.964286		
<input type="checkbox"/> QA02060147030org (QA Automatio		USD \$6.00	USD \$6.00	USD \$0.00	1		
<input type="checkbox"/> DPL test (DPL customer)		USD \$114.00	USD \$114.00	USD \$0.00	1		
<input type="checkbox"/> MR telco 2 (Mohrshah)		USD \$387.60	USD \$387.60	USD \$0.00	57		
<input type="checkbox"/> US_0101 (US_0101)		USD \$1,378.13	USD \$1,731.81	USD \$353.68	2.997268		
<input type="checkbox"/> Test Org (TestNew Customer)		USD \$67.20	USD \$67.20	USD \$0.00	2.083333		
<input type="checkbox"/> neha telco 4 (neha telco 4)		USD \$331.20	USD \$364.32	USD \$33.12	8		
<input type="checkbox"/> DJ US (Deep)		USD \$12.00	USD \$9.98	USD -\$2.02	1		
<input type="checkbox"/> Automation Customer0203044644		USD \$43.20	USD \$43.20	USD \$0.00	1		

Export as CSV
Export Billing Details
Generate Invoices
Select All
Select None
Update Report Filters
Manage Report Columns
Manage Report Grouping
Manage Tag Columns
Manage Customer Fields
Manage Cloud Account Fields

Manage Report Columns

Available Columns

- ☐ Seller Cost (Invoiced Currency)
- ☐ Seller Cost (Provider Currency)
- ☐ Subscription EndDate
- ☐ Subscription ID
- ☐ Subscription StartDate
- ☐ Type
- ☐ Usage Type
- ☒ Reseller PO Number
- ☐ Seat Count
- ☐ Region

Selected Columns

- Price book
- Seller Cost
- Customer Cost
- Margin
- Usage Quantity
- Unit
- End Customer PO Number

Add >

Close Update Report

The report will then show the selected fields and corresponding information when available. Users can save the changes as a custom report view, so they do not have to repeat these changes each time they view reports:

StreamOne ion

Home

Dashboard

Reports

Products

Billing

Partners

Customers

←

Date Range: Month to date

SAVE REPORT

U.S. Dollar

OPTIONS

Microsoft CSP Billing Customers Report

Month to date (Feb 1, 2023 to Feb 13, 2023)

Customer Name/Publisher Name/Cloud...	Seller Cost (USD)	Customer Cost (USD)	Margin (USD)	Usage Quantity	End Customer PO Number (...)	Reseller PO Number (cloud ...)	Unit
<div><div>▶</div><div><div><input type="checkbox"/></div>IVO Test 01 US (Komal)</div></div>	USD \$27.80	USD \$27.80	USD \$0.00	1			
<div><div>▶</div><div><div><input type="checkbox"/></div>Automation Customer0206050635</div></div>	USD \$6.00	USD \$6.00	USD \$0.00	1			
<div><div>▶</div><div><div><input type="checkbox"/></div>QA0206024400Org (Maria White)</div></div>	USD \$22,114.00	USD \$22,114.00	USD \$0.00	1			
<div><div>▶</div><div><div><input type="checkbox"/></div>KS IBM (ks IBM)</div></div>	USD \$24.00	USD \$24.00	USD \$0.00	2			
<div><div>▶</div><div><div><input type="checkbox"/></div>Azure RI SK (shrutee)</div></div>	USD \$18.39	USD \$24.00	USD \$5.61	2			
<div><div>▼</div><div><div><input type="checkbox"/></div>Best Customer (Best Customer)</div></div>							
<div><div>▼</div><div>Microsoft Corporation</div></div>							
<div><div>▶</div><div>50fb0e4c-f71f-42c7-c63c-a762948c</div></div>	USD \$12.00	USD \$12.00	USD \$0.00		CustoPO123	ResellerPO123	
<div><div>▶</div><div>76b0dc56-7075-439e-cf43-e9368a2</div></div>	USD \$16.60	USD \$16.60	USD \$0.00	2			
<div><div>▶</div><div>30f29b90-2355-4cb9-cebf-fcaa096</div></div>	USD \$0.00	USD \$0.00	USD \$0.00	25			
Total Microsoft Corporation	USD \$28.60	USD \$28.60	USD \$0.00	28			
<div>▶</div>	USD \$0.00	USD \$0.00	USD \$0.00	0			USD
Total Best Customer (Best Customer)	USD \$28.60	USD \$28.60	USD \$0.00	28			
<div><div>▶</div><div><div><input type="checkbox"/></div>Test NCE 0606 (prakhar)</div></div>	USD \$12.00	USD \$12.00	USD \$0.00	1			
<div><div>▶</div><div><div><input type="checkbox"/></div>IV US NCE (Indu V)</div></div>	USD \$2,448.83	USD \$2,448.83	USD \$0.00	2.75			
<div><div>▶</div><div><div><input type="checkbox"/></div>Automation Customer0201031830</div></div>	USD \$12.00	USD \$12.00	USD \$0.00	1			
<div><div>▶</div><div><div><input type="checkbox"/></div>TD Nidhi (Nidhi D)</div></div>	USD \$1,200.00	USD \$1,320.00	USD \$120.00	1			
Total:	USD \$459,652.64	USD \$3,636,778.80	USD \$3,177,126.16	64,165.423435			

Self Help

Billing

On the Billing side, this feature now makes both Reseller and Customer Purchase Order number fields and the corresponding data available when users download the Detailed CSV on the invoice screen:

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Home Dashboard Reports Products **Billing** Partners Customers

Billing

Customer invoices
Reseller invoices
My invoices
Reports V2
Legacy Reports
Import jobs
Pricebooks

Reseller

apptiump
SMP Reseller
12120 Sunset Hills Road
Reston, VA 20190, US
1

Contact
QAAutomation0213063338
SMP ISV
87 cours Jean Jaures
Bordeaux, VA 33100, US
1234567890
www.QAAuto0213063340.com

Payment Method: Purchase Order
Reseller ID: 2767
SAP ID: 38006872
Consolidation Type: EC

DOWNLOAD ▾

- Download Detailed CSV Microsoft CS...
- Download Detailed CSV Microsoft CS...
- Download CSV
- Download PDF
- Print

Qty	Charge Type	Price
1	Usage	-\$0.27
Total		-\$0.27

Cloud account fields are shown with the prefix “Custom_CloudAccountField:” followed by the field name:

A1 : X ✓ f SubscriptionID

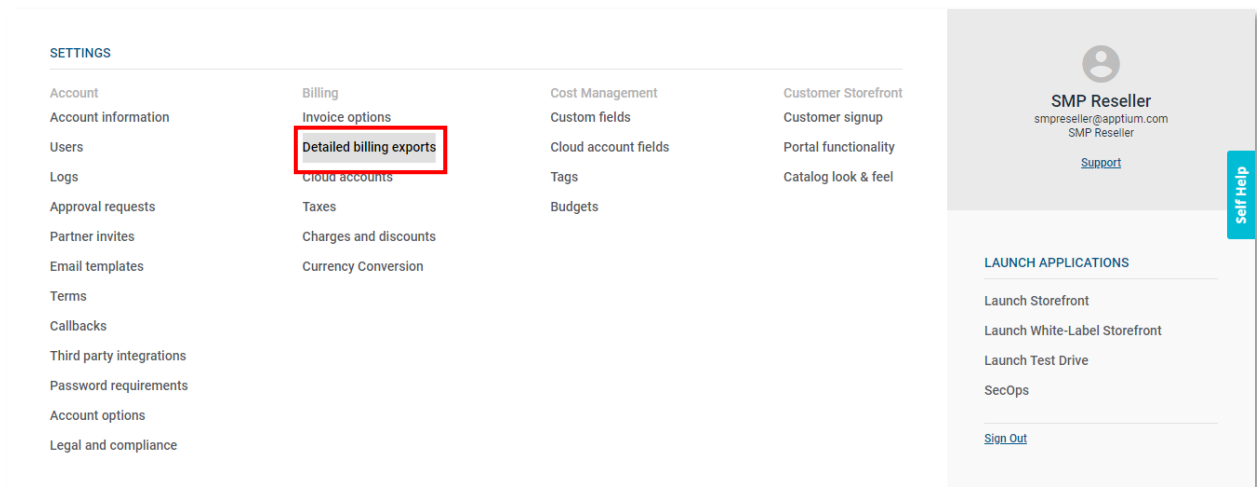
Internal Use Public Internal Use Confidential Restricted

AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR
derNun	Quantity	PeriodQu	SeatCount	Cost	Rate	ImportAcc	Location	Type	Custom_CloudAccountField:End_Customer_PO	Custom_C	Custom_CloudAccountField:Reseller_PO	Custom
774d28	25	1	25	0	0	azureplan-76015470-billing						
4a1724	1	1	1	12	12	azureplan-76015470-billing			CustoPO123		ResellerPO123	
d87f487	2	1	2	#####	9.96	azureplan-76015470-billing						

azureplan-76015470-5048-4e86-b7

Ready Accessibility: Unavailable Count: 4 100%

If users have the detailed billing export configured under “Settings” then any data related to the Customer Purchase Order number and/or Reseller Purchase Order number will also be available on these exports:



The changes presented in this feature are not reflected yet on the invoices resellers receive from TDSYNnex and will be introduced in future releases.

API Support

The information in the Cloud Account Custom fields will be available in the Detailed Invoice API.