iTAAP Organization Quick Start

Overview

iTAAP is a fully automated PAAS environment. The iTAAP setup process is simple, once you have decided to create your organization all the default settings are copied into your organization and you just log in and get started.

Pre-Requisites:

1. You must have an email address which can receive emails.
2. If you are going to enable Ingram-Micro API, you will require an Ingram-Mirco account and credential from their developer environment.
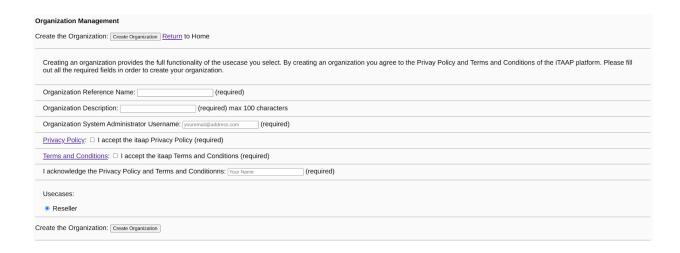   https://developer.ingrammicro.com/reseller

Organization Creation:

The iTAAP organization creation is fully automated and all the required services will be dynamically created and enabled for you to get started. The automated process will take a few seconds up to a minute. Once the organization has been created you will be notified via the iTAAP login screen with a Congratulations statement and a link to the iTAAP Organization Quick Start quide. This will allow you to finalize and customize your Organization. To create your Organization go to https://us-east.itaap.net and select Create and Organization.

Organization Creation:

Fill out the form to create the organization and agree to the privacy policy and terms and conditions.

Organization Management

Create the Organization: [Create Organization] Return to Home

Creating an organization provides the full functionality of the usecase you select. By creating an organization you agree to the Privay Policy and Terms and Conditions of the iTAAP platform. Please fill out all the required fields in order to create your organization.

Organization Reference Name: [_____] (required)

Organization Description: [_____] (required) max 100 characters

Organization System Administrator Username: [youremail@address.com] (required)

Privacy Policy: ☐ I accept the itaap Privacy Policy (required)

Terms and Conditions: ☐ I accept the itaap Terms and Conditions (required)

I acknowledge the Privacy Policy and Terms and Conditionns: [Your Name] (required)

Usecases:

● Reseller

Create the Organization: [Create Organization]

Defaults:

Organization URL:

The organization URL will be https://us-east.itaap.net/ . Your login (email) is associated with your organization and will grant you access to your organization.

Users: (default)

The user who created the organization is automatically granted system administration privileges and has full rights to administrate the iTAAP organization. This means you create users, create customers, edit the .css, update the ingram-micro api .yaml and enable control or functionality of the organization.

Customers: (default)

The default customers are the company the organization is created with on setup and Ingram-Micro. All companies you do business with are considered customers. Each customer has a master record and then an unlimited of bill to/ pay to and ship to addresses.

Schemas: (default)

iTAAP leverages schemas to control the functionality of the organization. All default schemas are copied and are general until you make them specific to your organization. They are ready to be used but may not have your organization specific information. Also, there will not be any customer specific schemas created. Please refer to Schema Administration for more details.

Creating Customers:

The concept for customers in iTAAP is that everyone is a customer. All your customers, all your vendors, manufacturers, suppliers, and anyone you will do business through iTAAP should be defined as a customer. All customers have a master record and bill/pay to and ship to definitions. You will define all the bill/pay to and ship to addresses based on the type of customer they are or how they will be used. Please refer to Customer Administration for more details.

Creating Users:

The concept for users in iTAAP is you are assigned a primary customer, which by default is usually the customer you work for and then get granted access to other customers. This limits your access to only those customers. The customers you have access too are customers you will see in the various menu options in iTAAP. You will only have access to information regarding the customers you have access too.

Please refer to User Administration for more details.

First Time Login:

The first time you login, use your email address you signed up with and you can either enter a password or you can use google authentication, if your email address is a google account. Those are the 2 option currently supported. Other options can be supported, if youw ish to request an alternative option such as Microsoft as an example, please contact support@itaap.net .

Logged In:

Once you have logged in for the first time, there a few items which need to be addressed.

Recommendation: Add all your customers and then add your users so you can provide the appropriate customer access to your users.

Customer Records:

Note: If you have a significant amount of addresses which need to be entered, please contact support@itaap.net and we can automate this process, if you have this information in a digital format.
1. Update your customer record:

a. From the menu go to Adminstration/Customer and select a customer to view. This should be your company record. Click Edit.
   b. On this page you will edit the master customer information, upload your image/logo or create a https reference to you image/logo and add your bill to/pay to and ship to addresses for your company.
   c. Logo: your image/logo will be used when generating your quotes/invoices and buy purchase orders. For customers, there logo will be used when they login based on their list company association. See User Administration for more information.
   d. Documents: Upload the default Terms and Conditions for customers to the main Organization customer. This will be the default for all projects quoting unless a specific document is uploaded to the specific customer documents.
   e. To save the edits, hit Edit. Select Cancel to return to the master customer page.
2. Add a Bill To / Pay To:
   a. Enter in all the pertinent information, if you have more then one Bill To/Pay To address, please select default on the location you wish the quoting address information to default too. All active address will be listed, but the default will be selected.
   b. Primary information like address, cisty, state, zip, phone and url are required, the logo, notes, image and taxrate are not required.
   c. To save the edits, hit Add. Select Cancel to return to the master customer page.
   d. Do this for all Bill To/Pay To addresses.
3. Add a Ship To:
   a. Enter in all the pertinent information, if you have more then one Bill To/Pay To address, please select default on the location you wish the quoting address information to default too. All active address will be listed, but the default will be selected.
   b. Primary information like address, cisty, state, zip, phone, url and taxrate are required, the logo, notes, and image are not required.
   c. Taxrate: this field is used to calculate the taxrate for the parts category, Hardware, if the taxrate is blank, a state generic taxrate is used from the schema statetax. Your tax adviser or a google search of the ship to address will be able to provide current taxrates. Taxrate definitions are the responsibility of the customer and should be defined as an example 7.55 and it will be converted to a percentage (.0755).
   d. To save the edits, hit Add. Select Cancel to return to the master customer page.
   e. Do this for all Ship To addresses for this customer.

User Accounts:

Note: User accounts are global and can be associated with 1 or more iTAAP organizations.
Note: If you have a significant amount of users which need to be entered, please contact support@itaap.net and we can automate this process, if you have this information in a digital format.

From the menu, select Administration/Users and a current list of users in your organization with be presented along with a create user button.

1. Select the create user button.
2. Enter in the users email address, what email address to send the email to, if different and select the user company.
    a. User Company: Select the company the user works for, there logo will be shown when they log into your Organization.
    b. The organization defaults to your organization.
3. Select the user role
4. Select the companies they have access to view or select all customers, this can be edited in the future.
5. Select Create Account and you will be prompted with an email message.
6. Send the email and the customer will login with their email account.

Add all your users both company, customer, etc.

Customize your Organization:

On the home page of your organization as a sysadmin, there are a few options not available to other user roles. Two of those items are access to the organization .css file and access to the organization api configuration .yaml file.

.CSS file:

The default .css is copied to your organization and this .css file can be downloaded and edited to provide a custom look and feel. Many or the classes can be customized with colors, fonts and additional information. An experienced HTML developer will be able to edit this file and provide a completely custom organization view.

1. Downloading the Organization.css, go to the Home page, As a SysAdmin role on the left payne there will be a download link to the organization.css.
2. Download this file to edit and make changes
3. Uploading once changes are made is simply drag and drop the file into the dropbox.
4. It will be uploaded and stored. The .css cache time varies but your updates should be seen within a 24 hour period and possibly sooner. If it doesn't change, please reach out to support@itaap.net .

Note: if you need assistance with modifying the .css, please reach out to support@itaap.net .

API Configuration .YAML file:

This is the configuration to integrate with the Ingram-Micro API. There are a few prerequisites required to edit this file and provide the correct information for the API to communicate correctly. Once this information has been attained:
1. Downloading the API Configuration .YAML, go to the Home page, As a SysAdmin role on the left payne there will be a download link to the API COnfiguration .YAML.
2. Download this file to edit and make changes
3. Uploading once changes are made is simply drag and drop the file into the dropbox.
4. It will be uploaded and stored. This .yaml file is read by the API gateway everytime a request is made, This takes effect immedaitely. If things are not working as you expect, please reach out to support@itaap.net .

Multiple Ingram-Micro accounts are supported. If you have any questions, please contact support@itaap.net.

Quoting Schema:

The quoting schema is the default schema used to setup quoting for your customers. There is the defaul quoting schema and customer specific quoting schema. First we want to make sure the default schema is setup to fit your business needs.
1. As a SysAdmin, go to the menu Administration/Organization Schemas and select it.
2. From the dropdown select the vendor/api/ingrammicro/quote and select edit.
3. This brings up the default view of the quoting information presented to you when quoting.
   a. This is the default for all quotes and they will be shown based on this schema
   b. Node Type - this defines the json document and how to import the json document from Ingram-Micro. These should not be changed.
      i. Changing default Margin - Scroll down to Field22: NodeName: table/margin/15 to change the default margin calculation for all quotes except customer specific quotes, change the 15 to whatever default margin you want to apply to your quotes. This can be changed when quoting but it will be the quote default.
   c. Show Node - This setting defines if the node canl be shown on a quote to the customer. All Dollar, Dollar -calc, Percentage and Percent-calc will be shown when quoting but not shown on the actual customer quote unless you select Show Node.
      i. Recommendation is to stay with defaults and modify in future as you use iTAAP.
      ii. An item setup to show node can be not shown when turned off when creating the quote.
   d. Encrypt Data - Never enable for quoting

     e. Node Type - This defines how iTAAP processes the field and validates the field. These should not be changed.

     f. Node Value - This is the title of the column on the quote. This can be changed and all future quotes will leverage the new Node Value setting on the quote column.

4. Once you have made the changes, select Edit or Copy and the changes have been saved.

Customer Specific Quoting Schema:

A customer specific quoting schema defines exactly how you want to present your quotes to the customer with a standard layout, margin, etc. This makes it extremely easy to quote specifically for a customer with little no quoting tweeks.

1. As a SysAdmin, go to the menu Administration/Organization Schemas and select it.
2. From the dropdown select the vendor/api/ingrammicro/quote and select edit.
3. In the name of the schema field add the following:
   a. customer/[nameofcustomer}/
   b. {nameofcustomer} as defined in itaap for the customer
   c. Example: customer/abccompany/vendor/api/ingrammicro/quote
4. This brings up the default view of the quoting information presented to you when quoting.
   a. This is the default for all quotes and they will be shown based on this schema
   b. Node Type - this defines the json document and how to import the json document from Ingram-Micro. These should not be changed.
      i. Changing default Margin - Scroll down to Field22: NodeName: table/margin/15 to change the default margin calculation for all quotes except customer specific quotes, change the 15 to whatever default margin you want to apply to your quotes. This can be changed when quoting but it will be the default.
   c. Show Node - This setting defines if the node canl be shown on a quote to the customer. All Dollar, Dollar -calc, Percentage and Percent-calc will be shown when quoting but not shown on the actual customer quote unless you select Show Node.
      i. Recommendation is to stay with defaults and modify in future as you use iTAAP.
      ii. An item setup to show node can be not shown when turned off when creating the quote.
   d. Encrypt Data - Never enable for quoting
   e. Node Type - This defines how iTAAP processes the field and validates the field. These should not be changed.
   f. Node Value - This is the title of the column on the quote. This can be changed and all future quotes will leverage the new Node Value setting on the quote column.

5. Once you have made the changes, select Edit or Copy and the changes have been saved to the customer/{nameofcustomer}/….
6. To edit this in the future, select the customer/[nameofcustomer/vendor/api/ingrammicro/quote
7. This can be performed for any and all customers, most of the time this is for specific customers. If a customer does't have a customer specific quoting schema the default is used.

Other Schemas to Review:

There are several other default schemas that can be customized as defaults and made to be customer specific. These are in no particular order:
1. config/businessunit - the generic business units your customers have you do business with
2. config/department - the generic departments your customers have you do business with
3. customer/menu/options - allows customer to upload there own purchase orders into iTAAP.
4. email-ses-info - the generic text included when sending emails from iTAAP interface for various functions.

All this can be customer specific as well. Please refer to scheam administration to understand more about each of these schemas.