

CONNECTPORTAL INSTANCES

This document contains information about the ConnectPortal Instances in TRIMIT 2017.

It is based on the released version of NAV and TRIMIT, and will only discuss the functionality and fields in standard TRIMIT.

For information about standard NAV fields, please see the documentation from Microsoft.

The audience for this document is the NAV Consultant or very skilled NAV User.

Be aware of not changing settings and parameters in a live database without consulting the implementing partner.

The information in this document is valid for TRIMIT version 2017 and beyond.

Be aware that the appearance in later versions of TRIMIT may vary from the screenshots in this document.

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INTRODUCTION

NAV TRIMIT and Modelyn support multiple portals instances connected to one company in TRIMIT. This functionality allows creating a load balancing on the web servers.

For example, it might be needed to isolate an existing B2C Webshop on a hosted high performing web server and to have a B2B Webshop on another local scaled down server in comparison.

In addition, this gives a possibility of e.g. splitting up a B2C brands on two instances but still share the same company in TRIMIT. Furthermore, initiating user synchronization is available from both ends - from TRIMIT and from Modelyn admin.

Furthermore, NAV TRIMIT has a feature of embedding portal pages inside the NAV application. This is one of the important steps in making TRIMIT NAV and Portals one system for the user.

The functionality described is the functionality in **TRIMIT 2017 W1**

The pictures in this White Paper are based on the demo database for **TRIMIT 2017 W1** (based on Microsoft Dynamics NAV 2017) in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. from Microsoft Dynamics NAV 2017).

COMPONENTS

TRIMIT ConnectPortals instance Mapping contains the following objects:

Table	<i>6038124 Instance Mapping</i>
Page	<i>6038100 Connect Portal Instances</i>
CodeUnit	<i>6038102 Portal Service Handler</i>

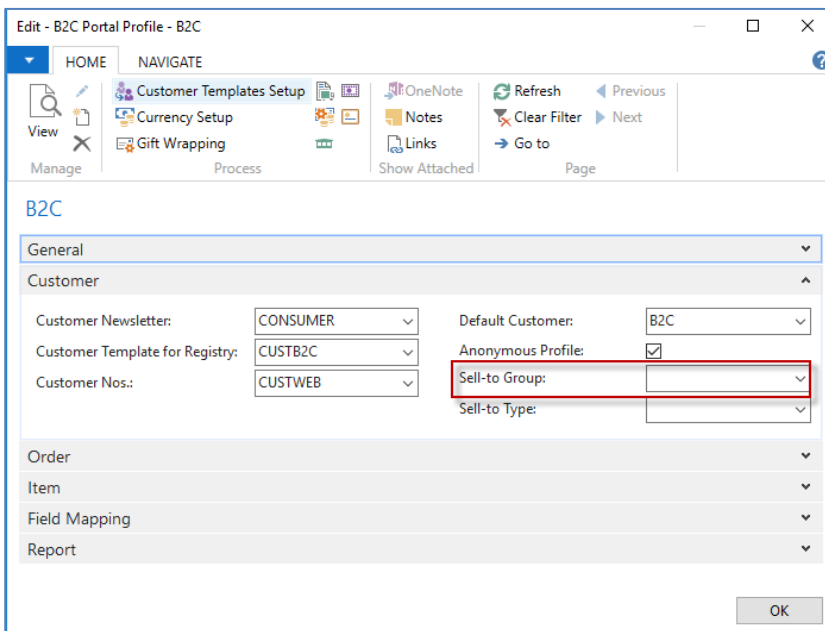
SETUP

In case of having multiple portal instances connected to the same NAV company the system uses unique user identification based on Modelyn Database ID and a unique user GUID. Hence, if there is a need to set up isolated instances, the key is to have a unique Database ID in the Modelyn database. In order to check or modify the Modelyn Database ID – go to the

CPO admin/System/Setup/Config/License/Database Id and locate the unique Database ID. If the ID is modified then it is required to recycle the application pool.

CUSTOMER ENTITY VERSUS E-MAIL

In conjunction with the ability to separate B2C instances, it is necessary to pay attention to the B2C user creation. If you want to support users creating themselves on different B2C brand sites (allowing different customer clubs etc.) you need to add a “creation” group. Otherwise user will be sharing same entity in TRIMIT based on the E-Mail address, which means you have two users point to same Customer entity in TRIMIT. Therefore, field **Sell-to Group** on **Customer Registration** FastTab on B2C profile should be filled in with its own group code.



Edit - B2C Portal Profile - B2C

HOME NAVIGATE

View Currency Setup Gift Wrapping Manage Process OneNote Notes Links Show Attached Refresh Clear Filter Go to Previous Next Page

B2C

General

Customer

Customer Newsletter: CONSUMER

Customer Template for Registry: CUSTB2C

Customer Nos.: CUSTWEB

Default Customer: B2C

Anonymous Profile: ☒

Sell-to Group:

Sell-to Type:

Order

Item

Field Mapping

Report

OK

MULTIPLE INSTANCES SETUP

In case when e.g. two portal instances are related to the same NAV company then portal profile has a setup to accommodate this. Sales agent and Supplier portal, B2B and B2C webshop profiles have a field Portal Database Id under fast tab **Advanced**.

Edit - B2C Portal Profile - B2C

HOME NAVIGATE

View Edit New Delete Manage

Customer Templates Setup Currency Setup Gift Wrapping Delivery Method Delivery Setup Show stock Stores Process

B2C

General

Customer

Order

Item

Field Mapping

Report

Advanced

Portal Database Id: 5086D9E6D5414A419FFFA137EE516867

The portal database ID can be taken from Modelyn under **System/Setup/Config/License/Database Id**:

System

Config: Database Id Save Save and Activate Use Default Value

Value

Database Id

5086d9e6d5414a419fffa137ee516867

Description

A unique id of this db. This is used when synchronizing user etc. You should not change this unless your an expert

Advanced

Connections

Schedules

Config

Main

Content

FTP

License

Owner Name

License Key

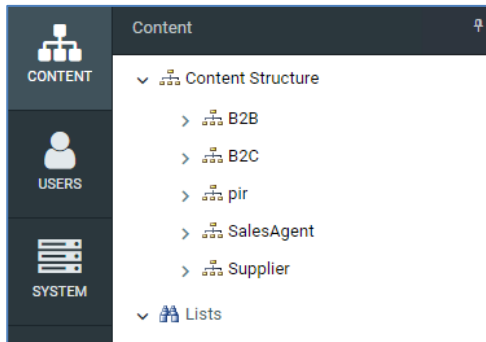
Database Id

Insights

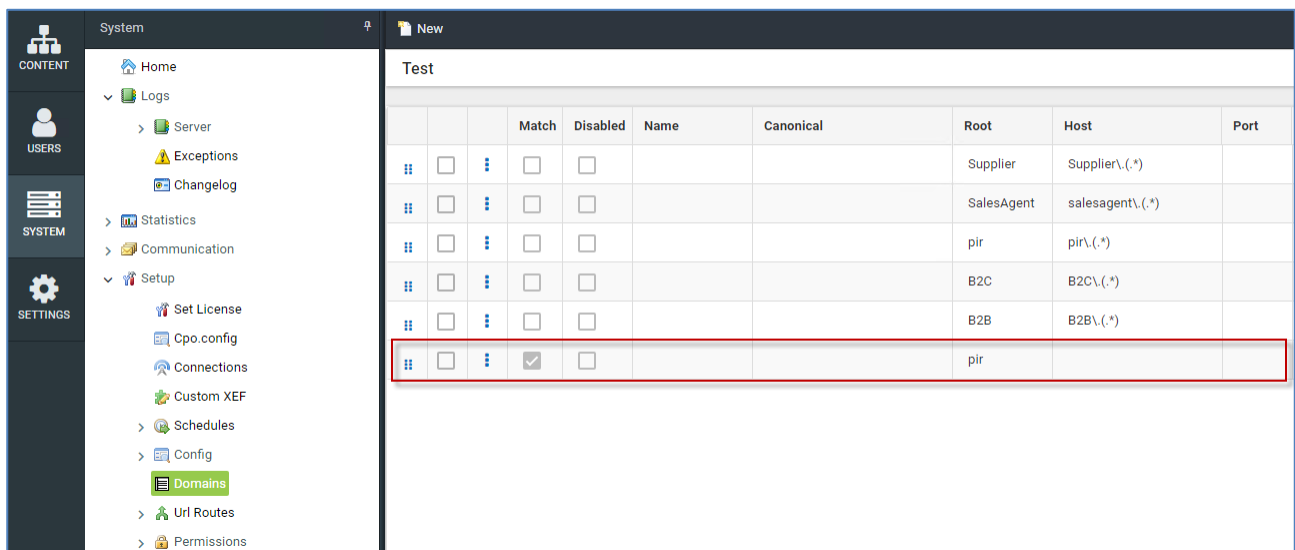
Therefore, if a portal is related to NAV and has s dedicated portal profile, then the profile should include the portal database ID.

MODELYN DOMAIN SETUP

ConnectPortals Instances functionality can resolve domain setups with subfolders (e.g. **trimit.com/pir/**) and subdomains (e.g. **pir.trimit.com**). The Modelyn domain setup though requires having the default domain pointing to PIR if Modelyn content structure is based on sub domains:

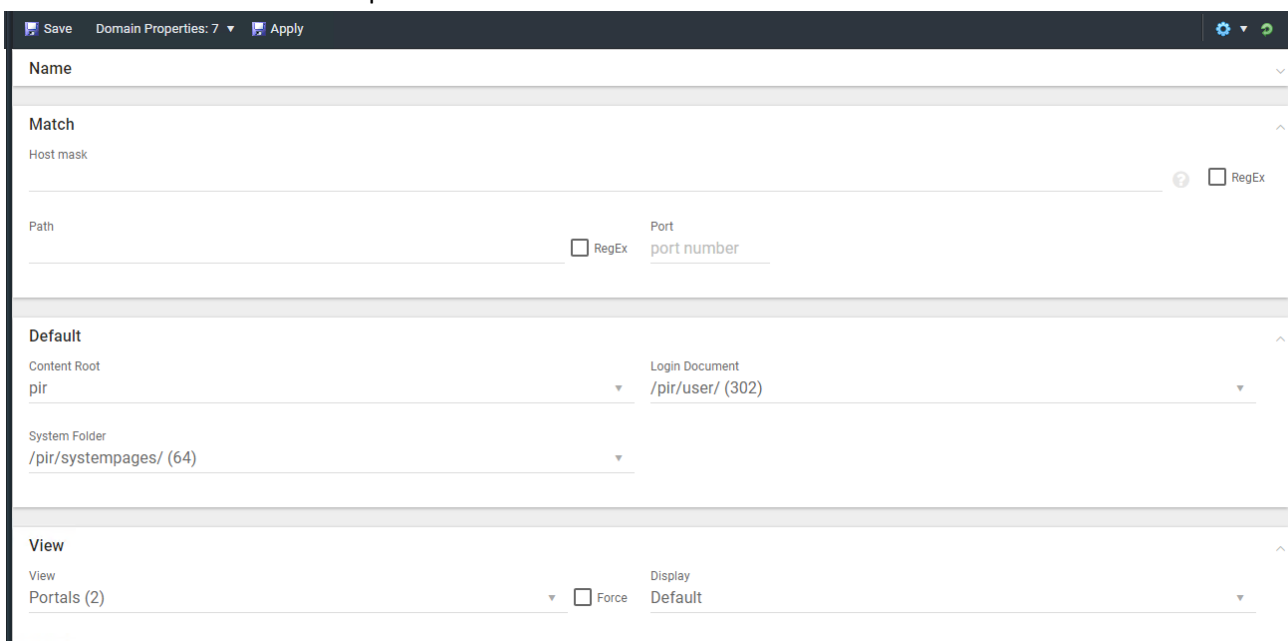


Modelyn domain setup:



(this is only needed for the time of resolving instances and can be changed afterwards).

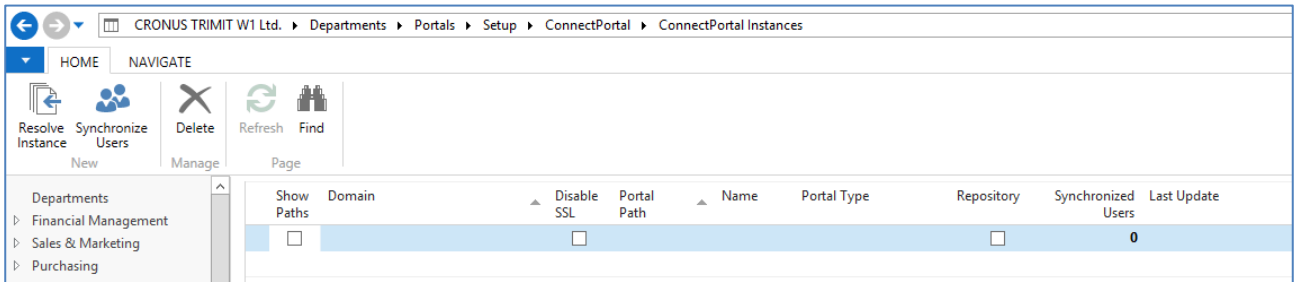
Inside the default domain setup:



NOTE: Make sure that Portal is connected to the right NAV Web service and NAV company.

INSTANCE MAPPING SETUP

In order to manage portal instances navigate in TRIMIT to page **ConnectPortal Instances** (via **Departments/Portals/Setup/ConnectPortal/ConnectPortal Instances**).



DESCRIPTION OF THE FIELDS

SHOW PATHS

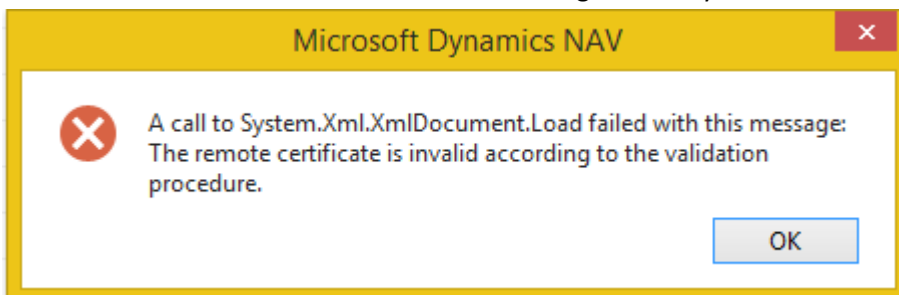
Boolean field. If set to **TRUE** then sub domains will be shown as well if there are any

DOMAIN

This field contains domain name. This field is mandatory before invoking **Resolve Instance** action

DISABLE SSL

Boolean field. Allows to disable SSL protocol while resolving instances. If this field is set to **FALSE** and **Resolve Instance** action is activated the following error may occur:



To avoid this happening – set this Boolean field to **TRUE**.

PORTAL PATH

This field is populated by the system after **Resolve Instance** action is activated. This field contains a path to a portal in a Modelyn content structure

NAME

Portal name, can be added manually

PORTAL TYPE

Portal Type, e.g. *BusinessToBusiness*, is set by the system.

The options are:

BusinessToBusiness
BusinessToConsumer
SalesAgent
BusinessToSupplier

REPOSITORY

Detected and set by the system for PIR subdomain/subfolder

SYNCHRONIZED USERS

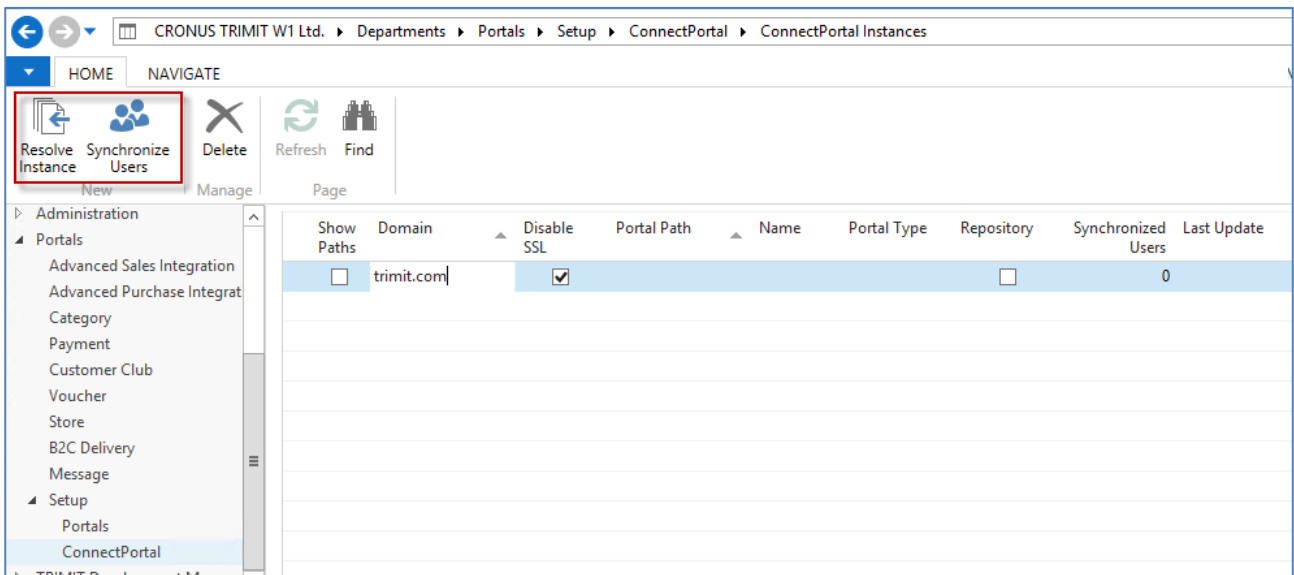
Number of Modelyn users

LAST UPDATE

The date of the last update

NOTE:

The Portals URL should be resolvable from the outside and inside of the local network. If the portal URL is resolvable from the inside but not from the outside then it is necessary to apply the Split-Brain DNS setup (<https://blogs.technet.microsoft.com/teamdhcp/2015/08/31/split-brain-dns-in-active-directory-environment-using-dns-policies/>). Otherwise make sure that all necessary ports are open in the firewall.



Show Paths	Domain	Disable SSL	Portal Path	Name	Portal Type	Repository	Synchronized Users	Last Update
☐	trimit.com	☒				☐	0	

When setup in Modelyn is done, it is needed to open ConnectPortal Instances in NAV TRIMIT (via **Departments/Portals/Setup/ConnectPortal/ConnectPortal Instances**) and specify the domain name of your portal without sub domains or sub folders, e.g. **trimit.com**. If no "https://" is used then set **Disable SSL** to **TRUE**. Now click **Resolve Instances** in the ribbon *Home*. The system queries your portal solution and retrieves all available sub domains or sub folders.

Setup with subdomains:

Show Paths	Domain	Disable SSL	Portal Path	Name	Portal Type	Repository	Synchronized Users	Last Update
☐	B2B.test.dk	☒	B2B		BusinessToBusiness	☐	2	04-05-2017
☐	pir.test.dk	☒	pir			☒	2	04-05-2017
☐	SalesAgent.test.dk	☒	SalesAgent		Sales Agent	☐	2	04-05-2017
☐	Supplier.test.dk	☒	Supplier		BusinessToSupplier	☐	2	04-05-2017
☐	test.dk	☒				☐	2	04-05-2017
☐	test.dk	☒	B2C		BusinessToConsumer	☐	2	04-05-2017

Setup with subfolders:

Show Paths	Domain	Disable SSL	Portal Path	Name	Portal Type	Repository	Synchronized Users	Last Update
☐	portal.dk	☒				☐	137	04-05-2017
☐	portals.dk	☒	/b2b/		BusinessToBusiness	☐	137	04-05-2017
☐	portals.dk	☒	/b2c/		BusinessToConsumer	☐	137	04-05-2017
☐	portals.dk	☒	/pir/			☒	137	04-05-2017
☐	portals.dk	☒	/salesagent/		Sales Agent	☐	137	04-05-2017
☐	portals.dk	☒	/supplier/		BusinessToSupplier	☐	137	04-05-2017

The following fields will be filled in automatically:

Domain – will be filled in with sub domains or portal domain when using subfolders, all depending on content structure in Modelyn

Disable SSL – if set for the domain the it will be set for all related sublines

Portal Path – will display all the available sub domains and sub folders

Portal Type – will detect the portal type and fill it in, except of domain and PIR records

Repository – PIR subdomain or sub folder will be detected and set to *TRUE*

Synchronized Users – the number of all Modelyn users will be detected and set automatically. If needed then press **Synchronize Users** in the ribbon *Home* to update this number

Last Update – will be filled in automatically.

SYNCHRONIZE USERS

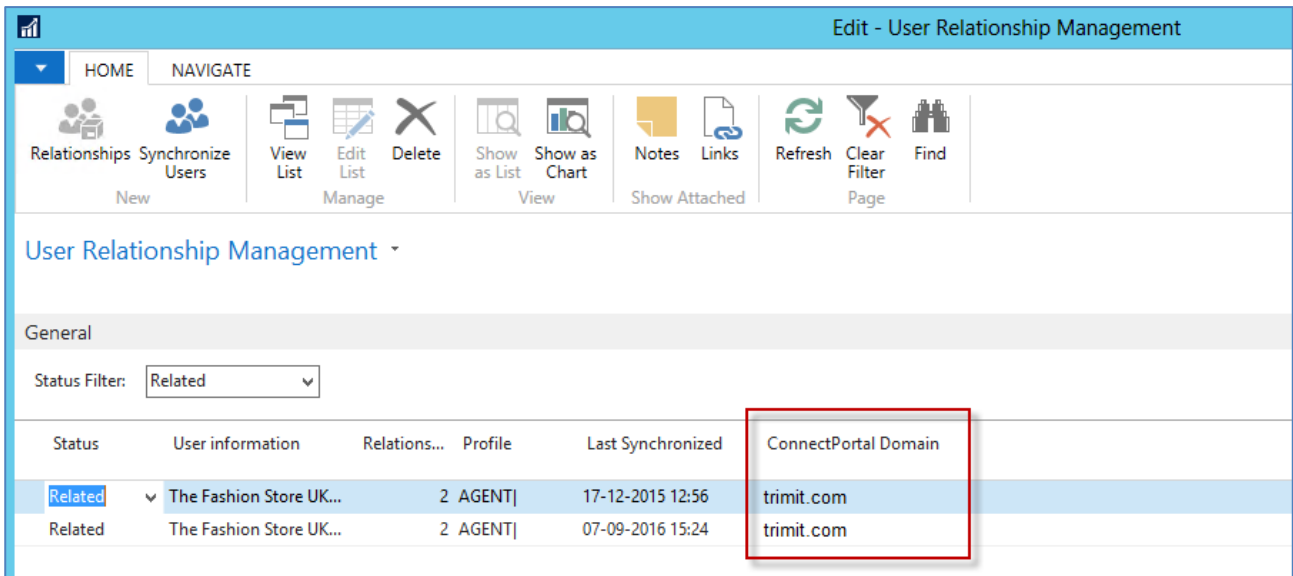
Having successfully resolved and setup the Instance(s) it is now possible to execute a user synchronization from NAV TRIMIT. For this - click **Synchronize Users** on the ribbon *Home* to run the service. Though user synchronization is handled during instance resolving automatically, however this can be needed if number of Modelyn users is updated.

The user synchronization will display a message verifying a successful execution. The number in field **Synchronized Users** will increase/decrease depending on users being created or deleted on the portal instance.

NOTE

If the User synchronization fails, the service will return the error message from the service. Go to the ConnectPortal to get more detailed information and resolve any issues.

Portal domain will be reflected for each Modelyn user in **User Relationship Management** list:



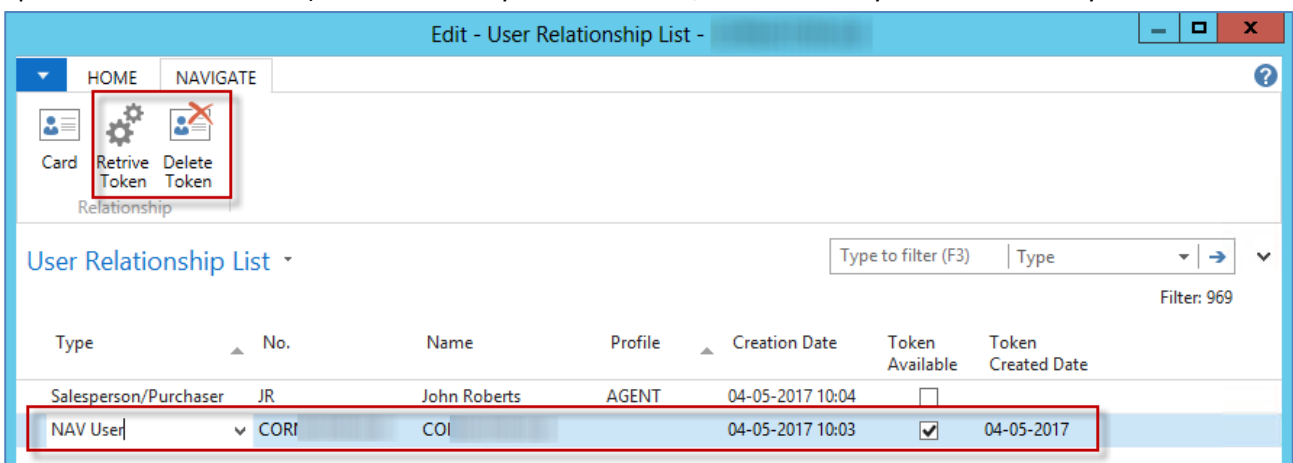
The screenshot shows the 'Edit - User Relationship Management' window. The 'General' tab is active, and the 'Status Filter' is set to 'Related'. A table lists users with columns: Status, User information, Relations..., Profile, Last Synchronized, and ConnectPortal Domain. The 'ConnectPortal Domain' column is highlighted with a red box, showing 'trimit.com' for two entries.

Status	User information	Relations...	Profile	Last Synchronized	ConnectPortal Domain
Related	The Fashion Store UK...	2 AGENT	17-12-2015 12:56	trimit.com	
Related	The Fashion Store UK...	2 AGENT	07-09-2016 15:24	trimit.com	

RETRIEVE TOKEN

After resolving instances and user synchronization is done then it is needed to relate a Modelyn user to appropriate relations in NAV TRIMIT under **User Relationship Management** (via **Departments/Portals/Setup/Portals**).

To be able to open PIR portal from the master page in NAV TRIMIT it is required to add a NAV User relation and retrieve an authentication token by clicking **Retrieve Token** (to skip login page every time the PIR is opened from NAV TRIMIT). This can be any valid NAV user, not necessarily the same Modelyn user.



The screenshot shows the 'Edit - User Relationship List' window. The 'Card' button is highlighted with a red box, and the 'Retrieve Token' button is also highlighted. Below the table, a row for 'NAV User' is highlighted with a red box, showing details for 'CORI'.

Type	No.	Name	Profile	Creation Date	Token Available	Token Created Date
Salesperson/Purchaser	JR	John Roberts	AGENT	04-05-2017 10:04	☐	
NAV User	CORI	COI		04-05-2017 10:03	☒	04-05-2017

DESCRIPTION OF THE ACTIONS

RETRIEVE TOKEN

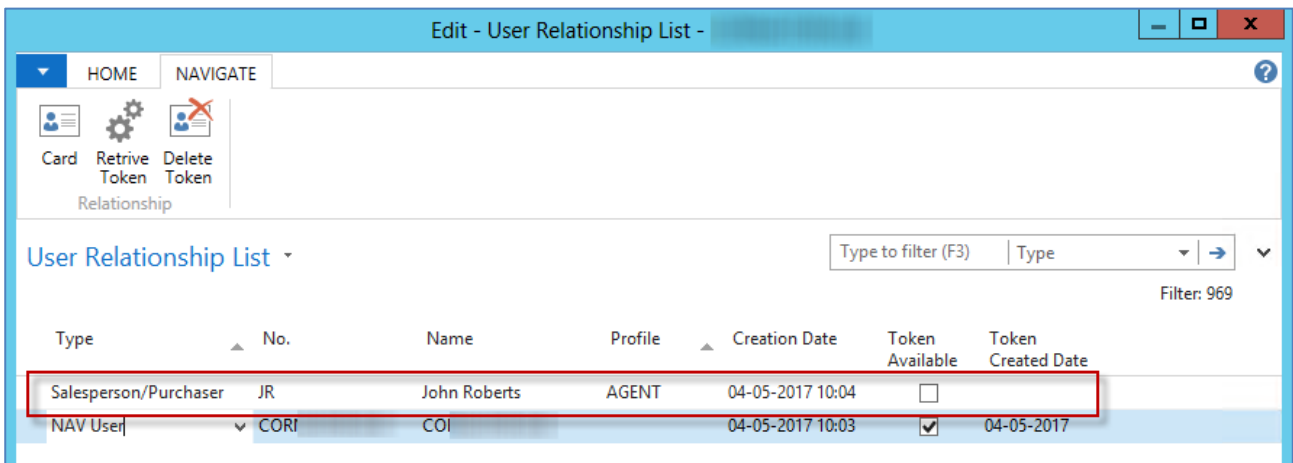
When this is clicked, the system makes a service call to the Portal repository services (see instance mapping). Where the system will security check the call via token handshakes. If that goes well the Modelyn will generate a token and attach that to the Modelyn user. The Token is then returned to NAV where it is set on the relationship.

This token is used behind the scene and applied to any request that needs authentication.

DELETE TOKEN

This action removes the token and sends a request to the Modelyn side to delete the token. After deletion, the auto login ability does not work anymore – any request from NAV to a page behind login will be redirected to a login page (it is considered that the request should not be executed if a token is not present).

In order to be able to open Sales Agent portal from NAV TRIMIT and initiate creation of a new order by using **Create Portal order Navigation** (in NAV TRIMIT Role Center) – it is required to relate a Modelyn user to a sales person in **User Relationship Management** (via **Departments/Portals/Setup/Portals**).



Type	No.	Name	Profile	Creation Date	Token Available	Token Created Date
Salesperson/Purchaser	JR	John Roberts	AGENT	04-05-2017 10:04	☐	
NAV User	CORI	COI		04-05-2017 10:03	☒	04-05-2017

NOTE:

If you have a current portals solution running with version before TRIMIT/Portals 2016 then users are created without the unique GUIDs - which is a condition for running multiple ConnectPortal Instances against the same TRIMIT Company. For more information, please refer to our documentation **Upgrade Guide for TRIMIT 2016 CPO users**.