




Coresuite license portal Quick Starter Guide

Agenda

- Why do we have a new portal?
- What's new?
- Function Overview
 - Login
 - Customers
 - Systems
 - Orders



Why do we have a new portal?

Why do we have a new portal?

- Adjustments were necessary to make sure we have a running and stable license portal for our partner in the future too.
- After more than 10 years it was time to update the user interface.
- The new license portal is the base for further improvements which will be implemented in the future.



What's new?

What's new?

- User Interface
- Login with Helpdesk Account. Additionally it is possible to provide access to the license portal to your employees if you're a partner administrator.
- History – You can see now the history and which changes are done by your users.

Remark: The language is based on your Browser Settings. Either German or English and some Screens look slightly different already. To speed up the process of the starter guide, the screenshots are (for now at least) available in German.

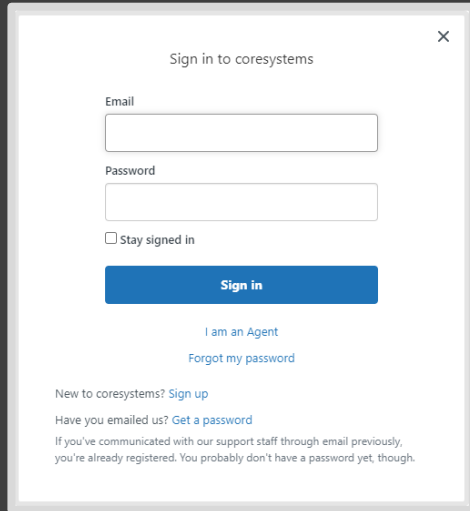


Login

Login

Go to portal.coresystems.ch and you will be requested to sign in with your Helpdesk Account.

Important: If you do not have an account by today, you have to create one by clicking on “Sign up” and verify your account by Email. **This account is replacing your existing account on the previous license portal.**

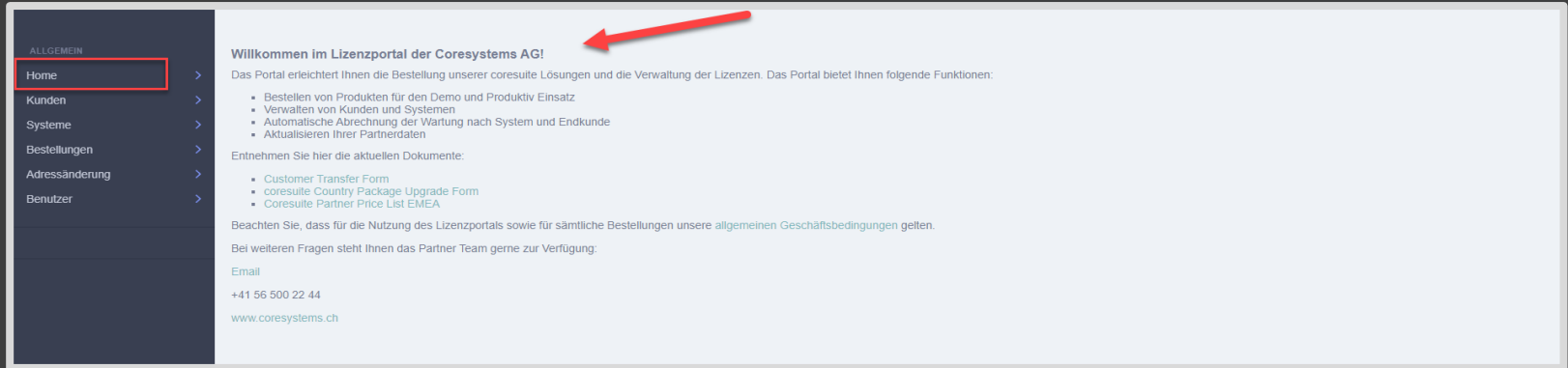


The screenshot shows a login window titled "Sign in to coresystems" with a close button (X) in the top right corner. It contains two input fields for "Email" and "Password". Below these is a checkbox labeled "Stay signed in". A blue "Sign in" button is positioned below the checkbox. Underneath the button are two links: "I am an Agent" and "Forgot my password". At the bottom, there is a link "New to coresystems? Sign up" and a paragraph: "Have you emailed us? [Get a password](#). If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though."

If you require access to more than one company, please get in touch with us.

Login

Depending on the browser settings (if language is German the navigation remain in German, otherwise the navigation will be in English) you access the coresuite license portal.



The screenshot shows the home page of the Coresystems AG license portal. On the left is a dark blue sidebar with a menu. The 'Home' item is highlighted with a red rectangle. The main content area is white and contains the following text:

Willkommen im Lizenzportal der Coresystems AG!

Das Portal erleichtert Ihnen die Bestellung unserer coresuite Lösungen und die Verwaltung der Lizenzen. Das Portal bietet Ihnen folgende Funktionen:

- Bestellen von Produkten für den Demo und Produktiv Einsatz
- Verwalten von Kunden und Systemen
- Automatische Abrechnung der Wartung nach System und Endkunde
- Aktualisieren Ihrer Partnerdaten

Entnehmen Sie hier die aktuellen Dokumente:

- Customer Transfer Form
- coresuite Country Package Upgrade Form
- Coresuite Partner Price List EMEA

Beachten Sie, dass für die Nutzung des Lizenzportals sowie für sämtliche Bestellungen unsere allgemeinen Geschäftsbedingungen gelten.

Bei weiteren Fragen steht Ihnen das Partner Team gerne zur Verfügung:

Email

+41 56 500 22 44

www.coresystems.ch

On the Home Screen you find information about relevant documents like the current price list.



Customer

Customer

You can search or create new customers in the menu “Customers”.

The screenshot displays the 'Kunden' (Customers) section of the Core Systems web application. On the left, a dark sidebar menu contains the following items: ALLGEMEIN, Home, **Kunden** (highlighted with a red box), Systeme, Bestellungen, Adressänderung, and Benutzer. The main content area features a search bar with the placeholder text 'Suche' and a green 'SUCHE' button. In the top right corner, there is a button labeled '+ Kunde hinzufügen' (Add Customer). Below the search bar, a table lists customers and their allocated systems. The table has columns for NAME, STADT, LAND, and SYSTEME. Two customers are listed: 'Cloud Nr. 9' from Heaven, Germany, and 'Mary Poppins' from Windisch, Switzerland. Each customer row has two buttons: 'Systeme anzeigen' (View Systems) and 'Neues System anlegen' (Create New System). Red arrows point to these buttons. The bottom right corner of the table area shows '0 Kunden'.

NAME	STADT	LAND	SYSTEME
Cloud Nr. 9	Heaven	Germany	<button>Systeme anzeigen</button> <button>Neues System anlegen</button>
Mary Poppins	Windisch	Switzerland	<button>Systeme anzeigen</button> <button>Neues System anlegen</button>

You can as well view all allocated systems, update those and download license files as well as create a new system for your customer.



Systems

Systems

Search for your customer system, create a new one or purchase licenses for the selected system.

ALLGEMEIN

- Home >
- Kunden >
- Systeme >**
- Offene Bestellungen >
- Bestätigte Bestellungen >

Suche Nach Kunde Nach OnDemand SUCHE

+ System hinzufügen

PK	AKTIV	CUSTOMER PARTNER	x v KUNDE	INSTALLATION ID	EXTERNE SYSTEM ID	HARDWARE KEY	ONDEMAND	DB NAME FÜR ONDEMAND	BEMERKUNGEN	LIZENZ KAUFEN
21046	✓	coresuite Lizenzportal TEST (3023557)	Cloud Nr. 9	123456	789	P0906134699	✓	cloud9	onDemand System	Lizenz kaufen
21045	✓	coresuite Lizenzportal TEST (3023557)	Mary Poppins	310475712	20239612	D0458218479	✗	-	Produktivsystem	Lizenz kaufen

Systems

In the menu “Systems” you can search for your customer systems, create a new one or order licenses directly. In order to create a new system, go to the button “create new system” and complete the requested information.

The screenshot displays the 'KUNDE HINZUFÜGEN' (Add Customer) form in the Core Systems application. The breadcrumb trail at the top reads: HOME > CORE > KUNDEN > KUNDE HINZUFÜGEN. The form is divided into two main sections: CUSTOMER and NOTES.

CUSTOMER SECTION:

- Name:** Mary Poppins
- Strasse:** Supercallfraglisticxpialdocious Street 1
- Postleitzahl:** 5210
- Stadt:** Windisch
- Land:** Switzerland (dropdown menu)
- Aktiv:** ☒

CONTACT SECTION:

- Kontaktname:** Mary
- Email:** (empty field)

NOTES SECTION:

- Notes:** Productive System

Buttons:

- Systeme anzeigen** (indicated by a red arrow pointing right)
- Neues System anlegen** (indicated by a red arrow pointing left)

Footer: A red box highlights the **SICHERN** (Save) button at the bottom left of the form.

Systems

In the detail view you can update the system information, view the license information and download the license file. In case there were changes made on that system, you can see the changes by clicking on the “History” button.

HOME > CORE > SYSTEME > 310475712 - 20239612 - D0458218479

ALLGEMEIN

Kunde:* Mary Poppins

OnDemand:* ☐ OnDemand ☒ OnPremise

Installation Id.* 310475712
Example: 000000000310475711

Externe System Id.* 20239612
Example: 0020239611

Hardware Key.* D0458218479
Example: D0458218478

WEITERES

Bemerkungen: Produkktivsystem

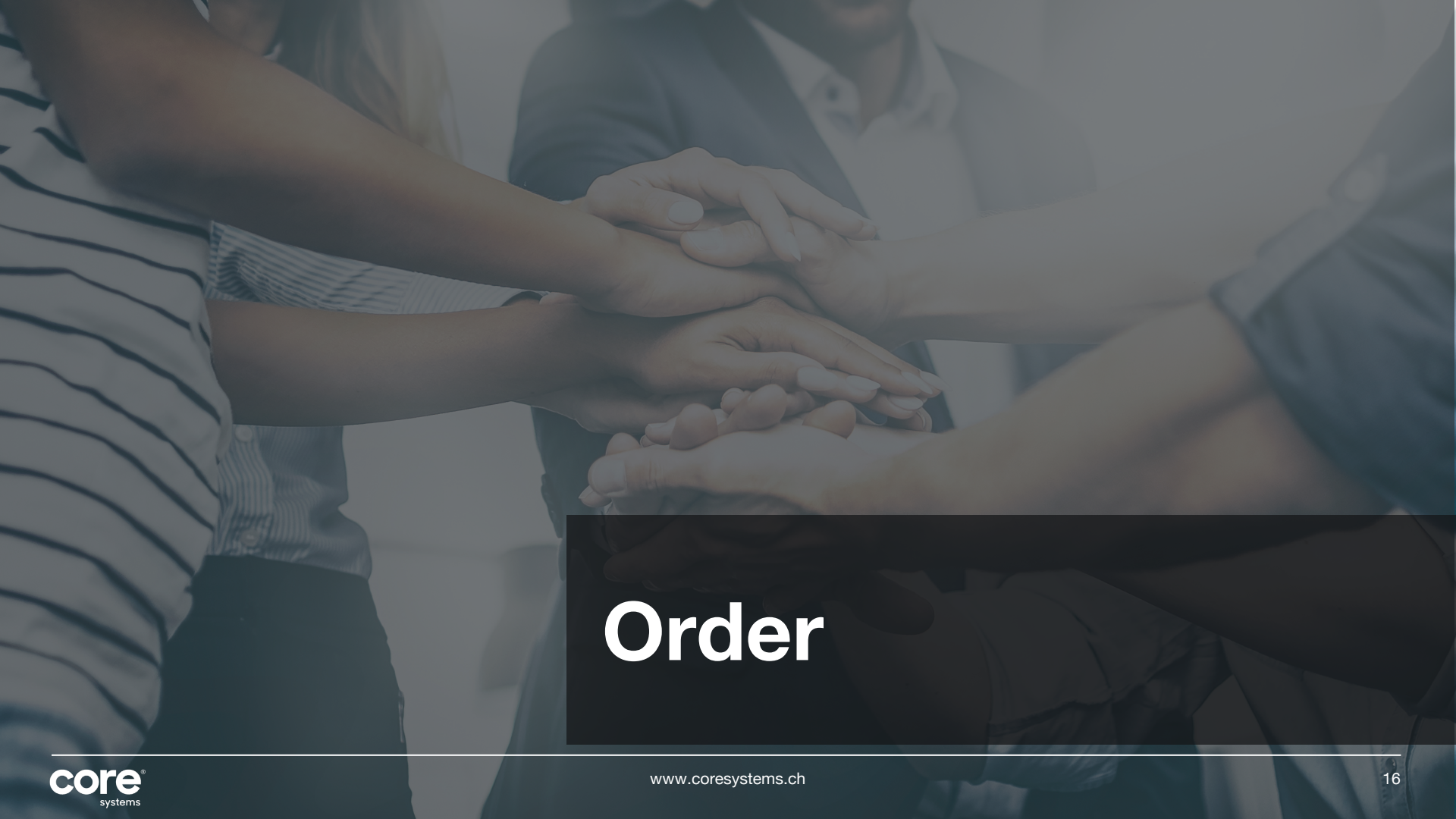
Produkte	Typ	Gültig bis	Menge
Coresulte Time	Produktiv	31. Dezember 2099	1
SwissAddOns	Produktiv	31. Dezember 2099	1
SwissAddOns ON HANA	Produktiv	31. Dezember 2099	1

Lizenz anfordern

SICHERN

Historie

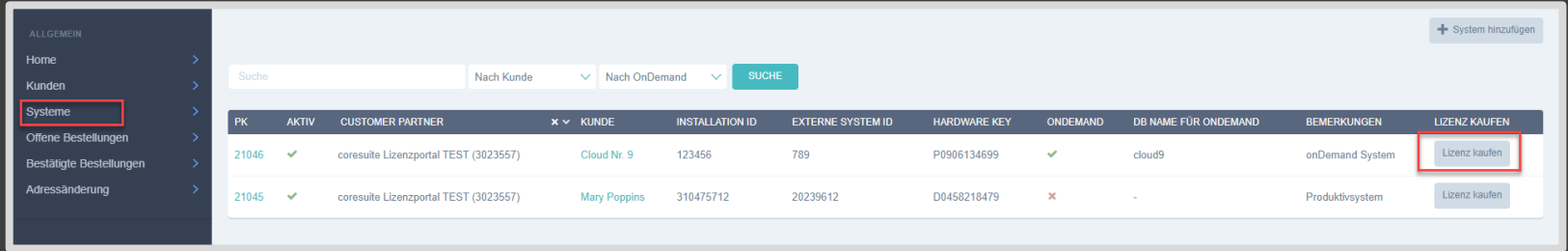
Important: Do not forget to save your changes!



Order

Order

To place a new order, it is important to create the system first. To order additional licenses, you have to select the corresponding system:



The screenshot shows the Core Systems web interface. On the left, a dark sidebar contains a menu with the following items: 'ALLGEMEIN', 'Home', 'Kunden', 'Systeme' (highlighted with a red box), 'Offene Bestellungen', 'Bestätigte Bestellungen', and 'Adressänderung'. The main content area has a light blue header with a search bar and filters. Below this is a table with two rows of system data. The first row is for 'Cloud Nr. 9' and the second for 'Mary Poppins'. Both rows have a 'LIZENZ KAUFEN' button, with the first one highlighted by a red box. A '+ System hinzufügen' button is in the top right corner.

PK	AKTIV	CUSTOMER PARTNER	KUNDE	INSTALLATION ID	EXTERNE SYSTEM ID	HARDWARE KEY	ONDEMAND	DB NAME FÜR ONDEMAND	BEMERKUNGEN	LIZENZ KAUFEN
21046	✓	coresuite Lizenzportal TEST (3023557)	Cloud Nr. 9	123456	789	P0906134699	✓	cloud9	onDemand System	Lizenz kaufen
21045	✓	coresuite Lizenzportal TEST (3023557)	Mary Poppins	310475712	20239612	D0458218479	✗	-	Produkktivsystem	Lizenz kaufen

Order

HOME > CORE > BESTELLUNGEN > BESTELLUNG HINZUFÜGEN

Partner: coresuite Lizenzportal TEST (3023557)
Kunde: Cloud Nr. 9
System: 123456 - 789 - P0606134599 - cloud9

Typ:
☐ Demo / Entwicklung
☒ Produktiv
☐ Produktiv (Eigengebrauch)

ARTIKEL	GÜLTIG BIS	EXISTENZ	MENGE	BASISPREIS PRO ARTIKEL	RABATT	PREIS TOTAL
Coresuite Time SQL CLOUD		0	0		0%	0
Coresuite Time HANA CLOUD	09.09.2021	0	1	80 EUR	30%	56.0 EUR
Coresuite Service CLOUD		0	0		0%	0
Coresuite Booking Wizard CLOUD		0	0		0%	0
Coresuite Country Package SQL CLOUD		0	0		0%	0
Coresuite Country Package SQL CLOUD (20 licenses)		0	0		0%	0
Coresuite Country Package SQL CLOUD (30 licenses)		0	0		0%	0
Coresuite Country Package SQL CLOUD (40 licenses)		0	0		0%	0
Coresuite Country Package HANA CLOUD	09.09.2021	0	1	105 EUR	30%	73.5 EUR
Coresuite Country Package HANA CLOUD (20 licenses)		0	0		0%	0
Coresuite Country Package HANA CLOUD (30 licenses)		0	0		0%	0
Coresuite Country Package HANA CLOUD (40 licenses)		0	0		0%	0
Total Lizenzkosten						130 EUR

* Alle Preise sind exklusiv MwSt und/oder Steuern.
Stornierungen sind nicht über das Portal möglich. Bitte info@coresystems.ch kontaktieren.

Bemerkungen:

☒ AGBs zustimmen

Bestellen

Select the correct order type and the licenses which should be ordered.

Complete the order by accepting the G&T's and submitting the order by the "Order" button.

Order

You receive an order confirmation by Email – you can see the details in the portal as well:

Order Confirmation Details:

Partner: coresuite Lizenzportal TEST (3023557)
Kunde: Mary Poppins
System: 310475712 - 20239612 - D0450218479

ARTIKEL	GÜLTIG BIS	MENGE	TYP	TOTAL NACH RABATT
Coresuite Time	08.12.2020	1	Produktiv	112 EUR
Coresuite Service	31.12.2099	1	Produktiv	966 EUR
Total Lizenzkosten				1078 EUR
Wartung / Jahr (10% vom Basispreis)				154.00 EUR

Bemerkungen: Viele Grüsse nach Windisch

[Schließen](#)

Orders List:

Bestellung „#35511: 310475712 - 20239612 - D0450218479“ wurde erfolgreich hinzugefügt.

Suche: Nach Kunde

ID	ERSTELLUNGSDATUM	SYSTEM INSTALLATION ID	SYSTEM CUSTOMER	BEMERKUNGEN	BESTÄTIGT
35511	9. September 2020 10:48	310475712	Mary Poppins	Viele Grüsse nach Windisch	✗
35496	8. September 2020 13:09	310475712	Mary Poppins	Test	✓
35477	4. September 2020 11:46	123456	Cloud Nr: 9	Greetings to Coresystem! Cheers Fabienne	✗
35476	4. September 2020 11:43	310475712	Mary Poppins	Test Fabienne	✗

4 Bestellungen

Open Orders = Order is placed, but licenses are not released yet (will be committed after payment)
Committed Orders = Licenses are released, order is completed.



User Management

User Management

ALLGEMEIN

Suche

BENUTZER	PORTAL ACCESS	PORTAL ADMIN
testpartner@coresystemsmail.ch	Aktueller Benutzer	Aktueller Benutzer
testpartner2@coresystemsmail.ch	<input type="button" value="Nein"/>	<input type="button" value="Nein"/>

2 Profile

Der User mit Portal Admin Rechten kann die weiteren Benutzer mit der gleichen Domain hier einsehen, sofern der User mit einem Helpdesk Account eingerichtet ist. Der Admin User kann definieren, welche User Portal Zugang erhalten sollen.

Wenn ein User nicht sichtbar ist, muss dieser vorab einen Helpdesk Account erstellen und kann dann eingesehen werden.

Contact us for further questions:



Euer Partner Team

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