

# **D365 Phase II User Manual – Disti. Portal (Opportunity)**

BC30

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**nuvoTon**

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# Disti. Portal Introduction



# Terms & Conditions(1)

First time log in the Disti. Portal

nuvoTon

Home | English | Sign in

## Terms and Conditions

Last modified: June 01, 2023

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1. Who are we?  
2. What is Personal  
3. What Personal  
4. On which legal  
5. Why do we use  
6. To whom and  
- Third party  
- International  
7. What do we do  
8. What are your  
9. How long do we  
10. Third party li  
11. Cookies  
12. Your Choice

### 15. 本政策的變更

我們將不定期修改本政策。頁面頂端的「最近更新」說明了最近一次修改時間，任何變更將在我們公布該經修訂的隱私政策後生效。

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< 加州居民適用 >  
根據加州消費者隱私法案("CCPA"), 加州居民在個人資料方面享有CCPA相關權利。請參考「根據CCPA針對加州消費者之新唐隱私權補充聲明」。

I agree to these terms and conditions.

Continue

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## Notes

1. If you are log in to the Disti Portal for the first time, the system will display the Privacy Policy . You will need to scroll down to the bottom, select the option "I agree to these terms and conditions," and click "Continue" to proceed with the login
2. The "Privacy Policy " will only display on your first-time login unless IT releases new "Privacy Policy ". In such a case, the new "Privacy Policy " will pop up, and you will need to accept them again

# Feature Introduction(1)

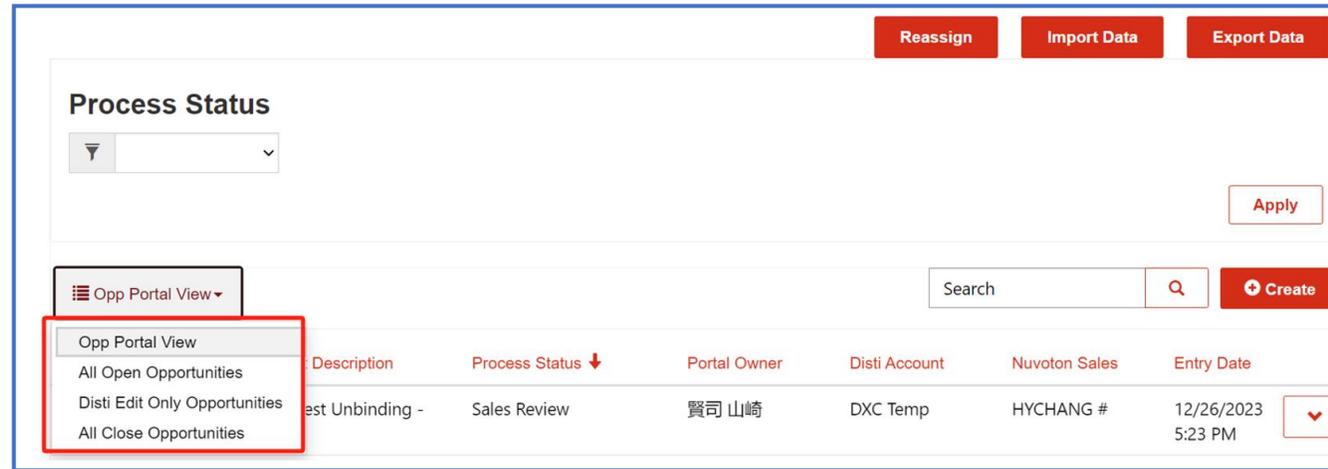


No	Feature	Description
1	Opportunity	Disti. Users can create, update, and manage opportunities
2	Download	Disti. Users can find the standard import templates for Opportunity and Opportunity Product here. Import guidelines will also be attached
3	Portal Accounts	Portal Account Admin can manage subaccount here, this menu only visible for Portal

# Opportunity View and Function Button

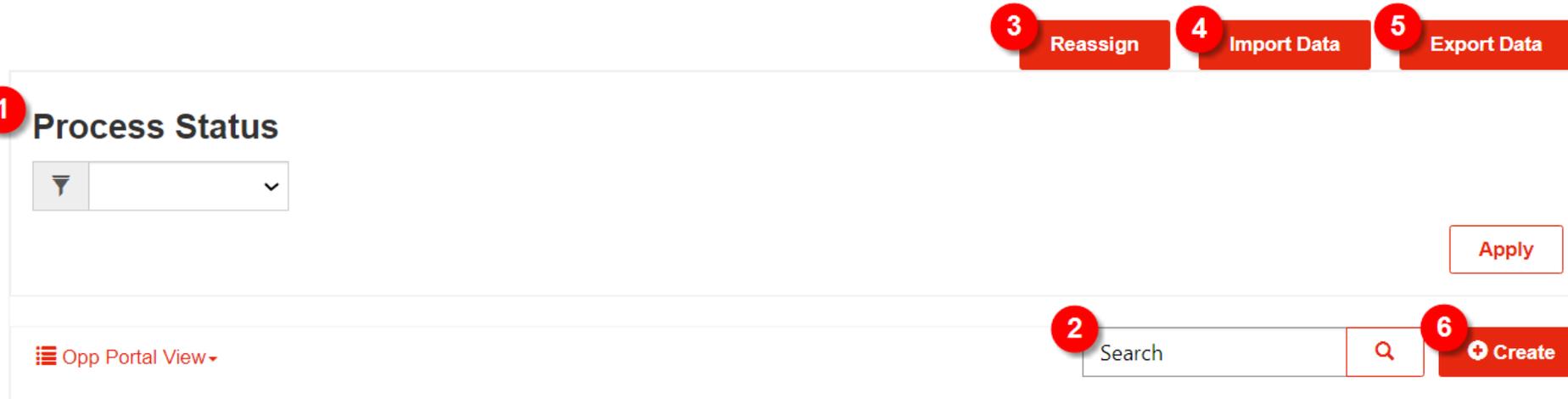


# Opportunity View (1)



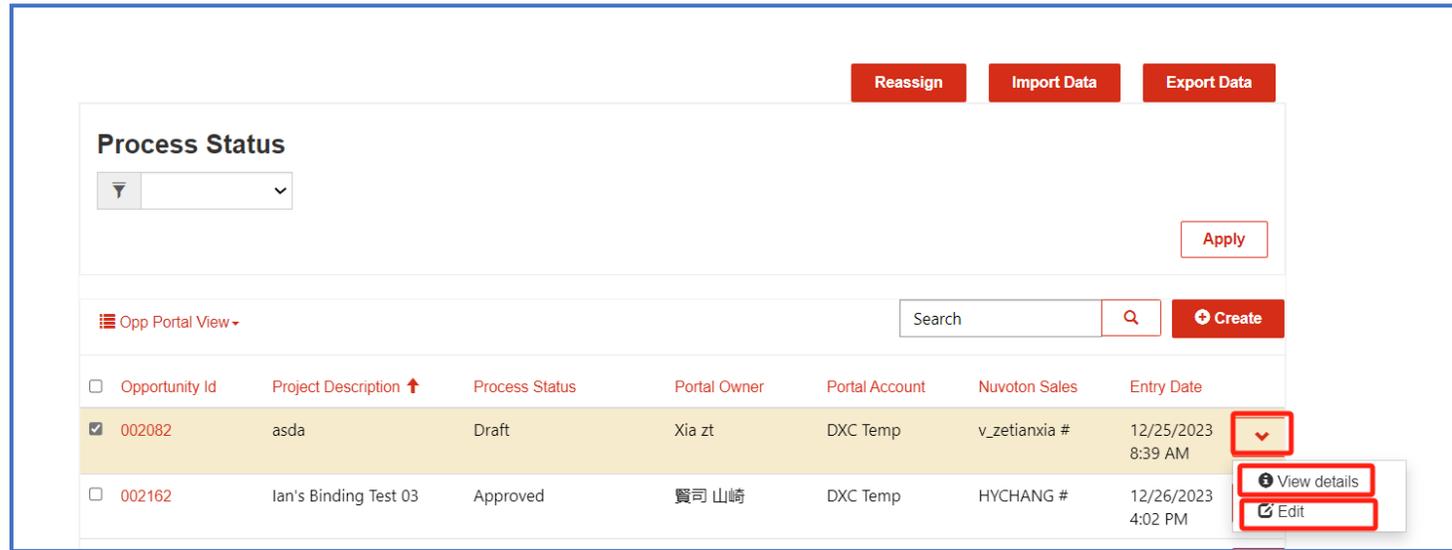
No	View Name	Description
1	Opp Portal View	All Opportunities ( within the same company ) are listed here
2	All Open Opportunities	All Opportunities (within the same company) and with [Opportunity status]='Open' are listed here
3	Disti. Edit Only Opportunities	All editable opportunities are listed here <ul style="list-style-type: none"> <li>Opportunity Admin : Allow modify other's Opportunities within the same company .</li> <li>Opportunity Personnel: Only Allow modify his own Opportunities</li> </ul>
4	All Close Opportunities	All closed opportunities are listed here

# Function Button (1)



- ❶ **Process Status:** Disti. Users can filter the Process Status and click “**Apply**” to search for corresponding Opportunities
- ❷ **Search:** Disti. Users can input keywords in the search box and click “**Apply**”/ **Magnifier** icon to search for Opportunities
- ❸ **Reassign:** **Opportunity Admin** can reassign Opportunities. This button is only visible to Opportunity Admin
- ❹ **Import Data:** Disti. Users can import Excel file to create/update Opportunities and Opportunities Products
- ❺ **Export Data** : Disti. User can click “Export Data” to export Opportunity data
- ❻ **Create:** Disti. User can click “Create “ to create a new Opportunity

# Function Button (2)



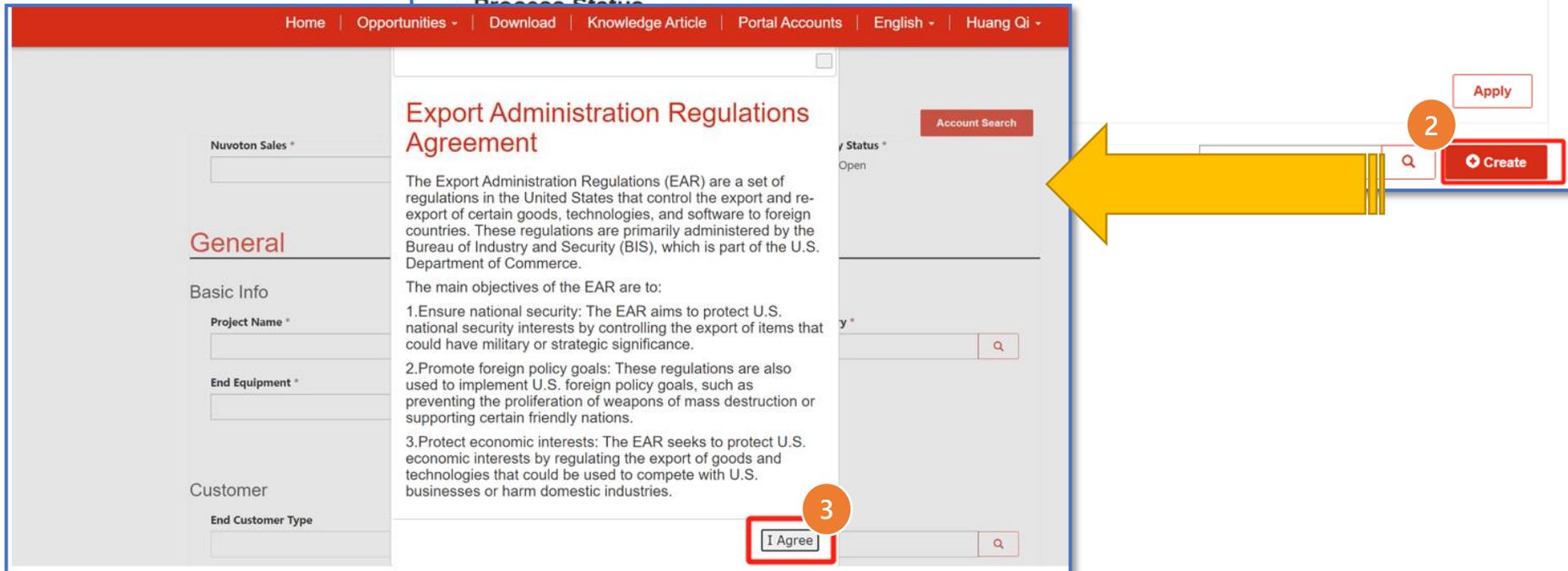
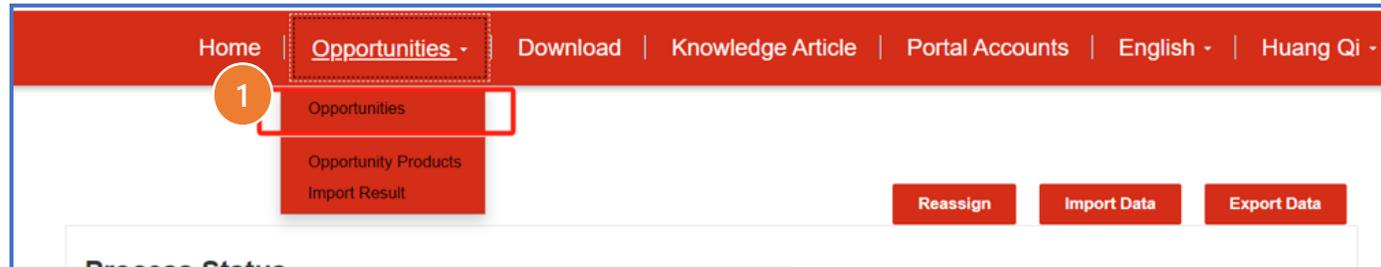
Click the drop-down arrow button, and there will be two options ( Edit will be only displayed when you have permission to modify the Opportunity )

- View details: Clicking "View details" will lead to the details form of the current Opportunity, where the data will be read-only
- Edit: Clicking "Edit" will also take you to the details form of the current Opportunity, but the data will be editable if you have the proper permission

# Disti. Portal Opportunity Operation Instruction

# Create Opportunity - Portal (1)

## Disti. create Opportunity



## Notes

- Log in Disti.Portal
- Expand the menu “Opportunities and click “Opportunities”
- Click “Create” button
- The system will then pop up the new creation page with “EAR Agreement”
- Click “I Agree” button to continue creating new Opportunity



# Create Opportunity - Portal (2)

## Disti. create Opportunity

**Account Search**

Nuvoton Sales \*

Lookup records

Search

Choose one record and click Select to continue

Name	Created On
<input type="checkbox"/> Liu #	12/11/2023 10:57 AM
<input type="checkbox"/> LFBin #	12/11/2023 10:57 AM
<input type="checkbox"/> SPChen #	
<input type="checkbox"/> TATSUI #	
<input type="checkbox"/> MTCHEN1 #	
<input checked="" type="checkbox"/> HYCHANG #	
<input type="checkbox"/> CYCHENO #	12/25/2023 3:12 PM

Disti. can select the relevant sales responsible for the Disti based on [Disti to Sales mapping] setting

Select Cancel Remove value

## Notes

- If you cannot find the Nuvoton sales' name, please contact sales directly
- Possible Causes:
  1. The sales account is inactive
  2. "Disti. to Sales Mapping" is not configured
- Once submitted for review, if you need to adjust Sales, please contact the new Sales or Nuvoton system person in charge

# Create Opportunity - Portal (3)

Disti. create Opportunity – General section

**General**

Basic Info

**Project Description \*** 7 Maximum Length: 40

**Territory \*** 8 Will be used as a filter condition for [End Customer]

**Sub Territory \*** 9

**End Equipment \*** 10

**Reference Design** 11

No  Yes

**Currency \***

USD

## Notes

To enter mandatory fields manually

- For [Territory] and [Sub Territory], click the “magnifying glass” icon to choose the data
- For [Project Description] and [End Equipment], manually input the data in the text box

# Create Opportunity - Portal (4)

Disti. create Opportunity – Customer section

The screenshot shows a form titled "Customer" with the following fields and callouts:

- End Customer Type**: A dropdown menu with a callout "12" pointing to the dropdown arrow. The menu is open, showing options: IDH, In-house, OBM, EMS, Foundry, and **Distributor**.
- Application \***: A text input field with a callout "13" pointing to a magnifying glass search icon.
- End Customer Layer 2 \***: A text input field.
- Sales Representative \***: A text input field.

## Notes

- For [End Customer Type], drop down the option list and choose the data.
- For [Application], click the "magnifying glass" icon to choose the data

# Create Opportunity - Portal (5)

## Disti. create Opportunity – Customer section

**14** Account Search

Nuvoton Sales \*  
HYCHANG # [x] [q]

Process Status \*  
Draft

Opportunity Status \*  
 Close  Open

### General

#### Basic Info

Project Description \* [q]

End Equipment \* [q]

Sub Territory \* [q]

Currency \*  
USD

#### Customer

End Customer Type

End Customer \* [q]

End Customer Layer 2 \* [q]

Distributor \* [q]

Sales Representative \* [q]

Application \* [q]

For the following fields, click "Account Search" to select the data accordingly:

- [End Customer]
- [End Customer Layer 2]
- [Distributor]
- [Sales Representative]

## Notes

- ❑ Note: Account search supports multi-language queries
- One of the two fields [Distributor] and [Sales Representative] must be filled in

# Create Opportunity - Portal (6)

## Disti. create Opportunity – Customer section

**15** Please select one record and click "Set" to continue

Account Type: End Customer

**16** a

**Choose one "Account Type"**

**17** Select the data record

IDB Code	Name	Name 1	Name 2	Territory
0110001010	(Block) Yantai Fuhuada	(Block) Yantai Fuhuada precision		
0110000978	(Block)Ennoconn	(Block)Ennoconn		
0110000843	Action Technology (HK) Co.,Ltd.	Action Technology (HK) Co.,Ltd.	Action Technology (HK) Co.,Ltd.	China/HK
0110000499	AeRa Corporation	AeRa Corporation	AeRa Corporation	China/HK
0110001020	AIC	AIC INDUSTRIAL (XIAMEN) CO., LTD.	AIC	China/HK
0110000461	ALL PLUS CO LTD	ALL PLUS CO LTD	ALL PLUS CO LTD	China/HK
0110000662	Ambit	Ambit Microsystems(ShangHai) LTD	Ambit	China/HK

If you cannot find the account in the above list, please select the "Dummy Account" listed below.

Name	Name 1	Name 2	Territory
Dummy Account	Dummy Account	Dummy Account	

**18** Click "Set"

Set

Select Dummy Account for [End Customer] or [End Customer Layer 2]

ntcdistiqas2.powerappsportals.com says

Dummy Account Added! DO NOT FORGET maintaining End Customer Text

Account Type: End Customer

aaa

Choose one record and click Select to continue

IDB Code	Name	Name 1	Name 2	Territory
	Dummy Account	Dummy Account	Dummy Account	

If you cannot find the account in the above list, please select the "Dummy Account" listed below.

Name	Name 1	Name 2	Territory
Dummy Account	Dummy Account	Dummy Account	

Set

Customer

End Customer Type: OBM

Application \*: AAD4

End Customer \*: Dummy Account

End Customer Layer 2 \*: Dummy Account

Application Description: Automotive\_ADAS\_Face-ID

End Customer Text \*: [Field]

End Customer Layer 2 Text \*: [Field]

Distributor \*: [Field]

**Required Field. Only when you choose dummy account, these two fields will be displayed accordingly**

## Notes

- Repeat the steps from 15 to 18 to set value for [End Customer], [End Customer Layer 2], [Distributor] and [Sales Representative]
- If you are unable to find the account information for [End Customer] and [End Customer Layer 2] that you want, you can select "Dummy Account" and manually maintain the [End Customer Text] and [End Customer Layer 2 Text] in the form

# Create Opportunity - Portal (7)

Disti. create Opportunity – “Fields only for Non-Japan Distributors” & “Remarks” section

Fields only for Non-Japan Distributors

Platform OS

19

Remarks

20

Opportunity Remark

AAABBB

Previous Opportunity Remarks

[01/31/2024 06:36 PM][lan Chang]AAABBB

# Create Opportunity - Portal (8)

## Disti. create Opportunity – Milestones section

**Milestones**

Common

**Mass Production Date \*** 23  
M/D/YYYY

**Last Shipment Date \***  
M/D/YYYY

**Design Complete Date** 24  
M/D/YYYY

Fields only for Japan Distributors

**Promotion\* (Open)**  
M/D/YYYY

**Submit Specifications\* (Design-in)**  
M/D/YYYY

**Sample Shipping Date\* (Design-in)**  
M/D/YYYY

**Inquiry Received\* (Open)**  
M/D/YYYY

**Opportunity Id**  
002292

**Save** 25

[Last Shipping Date] should be greater than [Mass Production Date]

## Notes

- Enter milestone fields
- Click "Save"
- Note: Please make sure you have entered all the mandatory fields and that the value of the field [Last Shipment Date] is greater than the [Mass Production Date]. Otherwise, the system won't allow you to save it
- After the new opportunity has been saved successfully, the [Opportunity ID] of this Opportunity will be generated automatically

# Create Opportunity - Portal (9)

## Disti. create Opportunity – Product section

### Product

Click "Create" in Product session.

Please click "Save" to save your changes in the Opportunity before "Create" or "Edit" a product record. Otherwise you will lose your changes

26

Opportunity Product No.      Opportunity

Create

Product Line Id	ASP *
<input type="text"/>	<input type="text"/>
Product (Part No/GC Code) *	QTY *
<input type="text"/> <input type="button" value="Q"/>	<input type="text"/>
Currency	
USD	
AMT	AMT(TWD)
—	—
AMT(JPY)	AMT(USD)
—	—
Part Status *	
Open	
Competitor	Design In Date
<input type="text"/>	—
Compt.Price	Won/Lost Date
<input type="text"/>	—

The system will pop up a new creation window

# Create Opportunity - Portal (10)

Disti. create Opportunity – Product section

Create

Product Line Id: FF102LOG

ASP \*: 55

Product (Part No/GC Code) \*: BT013A

Currency: USD

AMT: —

AMT(JPY): —

Part Status \*: Open

Competitor: —

Compt.Price: —

Design In Date: —

Won/Lost Date: —

Click the "magnifier" icon to choose a Product (Part No/GC Code). The [Product Line Id] will be filled in automatically accordingly.

Select Dummy Product for [Product (Part No/GC Code)]

Create

Product Line Id \*: [Empty]

Product (Part No/GC Code) \*: Dummy Product

Currency: USD

Product (Part No/GC Code) Text \*: [Empty]

ASP \*: [Empty]

QTY \*: [Empty]

Note: If you choose Dummy Product as [Product (Part No/GC Code)], you must maintain [Product (Part No/GC Code) Text] manually in creation form and choose [Product line Id] manually.

## Notes

- ❑ Only when you choose Dummy Product, this field [Product (Part No/GC Code) Text] will be displayed accordingly

# Create Opportunity - Portal (11)

## Disti. create Opportunity – Product section

Create

Product Line Id: FF102LOG

Product (Part No/GC Code) \*: BT013A

Currency: US\$

AMT: —

AMT(JPY): —

Part Status \*: Design-In

Competitor: —

Compt.Price: —

ASP \*: 22

QTY \*: 800

AMT(TWD): —

AMT(USD): —

Design In Date: —

Won/Lost Date: —

28

Input rest mandatory fields

Create

NOT required fields

Cust. part#: —

Competitor part no: —

Part Remark: —

Unit \*: Primary Unit

Reg. Cost: —

Reg. No(US only): —

Previous Part Remarks: —

Opportunity Product Status: Draft

29

Save

Click "Save"

## Notes

- ❑ Part status can only select the "Open" stage at the beginning. After it is submitted to Sales and sent to his supervisor for review (that is, Process status = Approved), the Open status can enter the next stage, namely Design-in or Lost.

# Create Opportunity - Portal (12)

## Disti. create Opportunity – Product section

Product

Please click "Save" to save your changes in the Opportunity before "Create" or "Edit" a product record. Otherwise you will lose your changes

Create

Opportunity Product No.	Opportunity	Product (Part No/GC Code)	Product (Part No/GC Code) Text	Product Line Id	Part Status
002814-1	002814	BT013A		FF102LOG	Design-In

Project Total Qty: 800

Project Total AMT: 17,600.00

Project Total AMT(TWD): 546,040

Project Total AMT(JPY): 2,376,000

30

Save

Submit to Sales

Click "Submit to Sales"

Then the newly created opportunity product record will be displayed on the product view, and the related [Project Total QTY] and [Project Total AMT] will be calculated automatically.

## Notes

- Click "Submit to Sales" (The Opportunity status will be updated to "Sales review" automatically and this opportunity will not allow the Disti. User to edit it anymore until it has been "back to Disti" by sales in D365 or "Approved/Rejected" in BPM.)
- Note: Before you submit this opportunity to sales, make sure you have added at least one product for this opportunity; otherwise, the system won't allow you to submit it.



# Unbind Validation- Portal (1)

[View Audit](#)

This Opportunity is bound by another Disti. and cannot be submitted, please contact [Nuvoton Sales] for details.

**Opportunity Id**  
002320

<b>Nuvoton Sales *</b> v_gavinchen #	<b>Process Status *</b> Sales Review	<b>Opportunity Status *</b> <input type="radio"/> Close <input checked="" type="radio"/> Open
---	---	--

### General

#### Basic Info

<b>Project Description *</b> Test Demo 010223	<b>Territory *</b> America	<b>Sub Territory *</b> Alabama
<b>End Equipment *</b> test	<b>Reference Design</b> <input checked="" type="radio"/> No <input type="radio"/> Yes	<b>Currency *</b> USD

#### Customer

<b>End Customer Type</b> In-house	<b>Application *</b> AA02	
<b>End Customer *</b> HP	<b>End Customer Layer 2 *</b> HP	<b>Application Description</b> Automotive_ADAS_Camera Monitoring System

**Notes**

- If the [End Customer] and [End Customer Layer 2] are being used by another Disti. company, when you click "Submit to Sales", the system will pop up a message reminding you that "This Opportunity is bound by another Disti. and cannot be submitted ,please contact [Nuvoton Sales] for details"

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# Conflict Validation (1)

[View Audit](#)

This Opportunity is conflict.

**Opportunity Id**  
002319

**Nuvoton Sales \***  
v\_gavinchen #

**Process Status \***  
Sales Review

**Opportunity Status \***  
 Close  Open

## General

### Basic Info

**Project Description \***  
test create1228

**Territory \***  
China/HK

**Sub Territory \***  
Beijing

**End Equipment \***  
test

**Reference Design**  
 No  Yes

**Currency \***  
USD

### Customer

**End Customer Type**  
In-house

**Application \***  
AA01

**End Customer \***  
(Block)Ennoconn

**End Customer Layer 2 \***  
Anand Mando eMobility

**Application Description**  
Automotive\_ADAS\_Around View

## Notes

- If the newly created/updated Opportunity has a similar [Project Description], the same [End Customer], the same [End Customer Layer 2], and the same [Product (Part No/GC Code)] as another Opportunity created by the same Dist. Account user, when you click 'Submit to Sales', the system will pop up a message: "This Opportunity is a conflict"

# Update Opportunity (1)

Reassign Import Data Export Data

Process Status  
Editing

Product  
Update the editable fields

Please click "Save" to save your changes in the Opportunity before "Create" or "Edit" a product record. Otherwise you will lose your changes

Product part no	Compt.Price	Cust. part#	Registered	Reg. Cost	Reg. No(US only)	Created On
			No			2/1/2024 11:37 AM

Project Total Qty: 800  
Project Total AMT: 17,600.00  
Project Total AMT(TWD): 546,040  
Project Total AMT(JPY): 2,376,000  
Project Total AMT(USD): 17,600

Click "Save"

Click "Submit to Sales"

Click "Edit"

## Notes

Find the record that you want edit

1. Click drop down arrow
2. Click "Edit"

Note: For Opportunity Admin : allow to modify all the Opportunities created by same account users(which Opportunity Process status="Draft"/ "Editing"/ "Approved"/ "Rejected)

For Opportunity Personnel : Only allow to modify his Own created Opportunities(which Opportunity Process status="Draft"/ "Editing"/ "Approved"/ "Rejected)

# Update Opportunity Product (1)

## Notes

1. Click "Edit" and Update the editable fields
  2. Click "Save"
  3. Click "Submit to Sales"
- ❑ Noted: Please click "Save" to save your changes in the opportunity before "Create" or "Edit" a product record. Otherwise you will lost your changes

**Product**

Please click "Save" to save your changes in the Opportunity before "Create" or "Edit" a product record. Otherwise you will lose your changes

**1** Click "Edit"

Update the editable fields  
E.g.: Part Status

**2** Click "Save"

**3** Click "Submit to Sales"

Submit to Sales

Unit \*  
Primary Unit

Opportunity Product Status  
HasBeenApproved

Part Remark

Competitor part no

Reg. No(US only)

Reg. Cost

Cust. part#

or part no

2/1/2018

o(US only)

Create

Edit

# Update Opportunity Product (2)

## 1. AI Application Tag in Opportunity Information:

- When filling in Opportunity details, please check whether the "Application Tag" is related to AI applications.
- Scenario A: If a Product (Part No/GC Code) is pre-defined by Nuvoton as an AI product, the system will automatically apply the AI tag. If the product is not AI-related, you may remove the tag.
- Scenario B: If a Product (Part No/GC Code) is not pre-defined as an AI product by Nuvoton, you may manually add the AI tag if applicable.

## 2. Current AI Product Definition:

- Only M55M1 is currently defined as an AI product in the system.

The screenshot displays the 'Edit' form for an Opportunity Product. The form includes the following fields and values:

- Product (Part No/GC Code): M0318TYE3AE
- Currency: USD
- Product Group: MCU
- Product Group Description: Foundry
- ASP: 55.00000
- QTY: 10,000
- Opportunity Product No: 003062-1
- Application Tag: AI
- AMT: 550,000.00
- AMT(TWD): 17,063,750
- AMT(USD): 550,000

A blue arrow points to the 'Application Tag' field, which is highlighted in yellow and contains the value 'AI'. A red circle with the number '2' is next to the 'Application Tag' field. A red circle with the number '1' is at the bottom right of the form.

# View Audit –Check update details (1)

## Notes

1. Click "View Audit", View Audit window pops up; all the updated records are listed in the page

Account Search View Audit

Saved

Opportunity Id  
002292

Nuvoton Sales  
v\_gavinchen

### View Audit

User	Operation	Modified On	Value
# Portals-NTC Sales - ntcsales	Update	12/28/2023 7:23 PM	Change:Last Update Final:12/28/2023 7:20 PM => 12/28/2023 7:23 PM, Change:Last Update(Disti):12/28/2023 7:20 PM => 12/28/2023 7:23 PM, Change:Project Description:test create1228 => test create1228 update,
# Portals-NTC Sales - ntcsales	Update	12/28/2023 7:20 PM	Change:Last Update Final:12/28/2023 12:17 PM => 12/28/2023 7:20 PM, Change:Last Update(Disti):12/28/2023 12:17 PM => 12/28/2023 7:20 PM,
# Portals-NTC Sales - ntcsales	Create	12/28/2023 12:44 PM	New Value:Application => AA02, New Value:Currency => USD, New Value:Distributor => ABBA, New Value:End Customer => (Block)Ennoconn, New Value:End Customer Layer 2 => Anand Mando eMobility, New Value:End Customer Type => In-house, New Value:End Equipment => Mobile, New Value>Last Shipment Date => 12/28/2023, New Value>Last Update Final => 12/28/2023 12:17 PM, New Value>Last Update(Disti) => 12/28/2023 12:17 PM, New Value>Last Updated by(Disti) => Huang Qi, New Value:Mass Production Date => 11/28/2023, New Value:Nuvoton Sales => v_gavinchen #, New Value:Opportunity Status => Open, New Value:Opportunity Type => Existing Customer,

# Reassign Opportunity (For Opportunity Admin Only) (1)

Process Status

Click "Reassign"

2

Apply

Opp Portal View

Search

Create

<input type="checkbox"/>	Opportunity	Project Description	Process Status	Portal Owner	Portal Account	Nuoton Sales	Entry Date	
<input checked="" type="checkbox"/>	002222	TEST 3	Sales Review	Chen Gavin	DXC Temp	HYCHANG #	12/27/2023 4:55 PM	▼
<input checked="" type="checkbox"/>	002168	Ian's Test Unbinding - 1226	Sales Review	賢司 山崎	DXC Temp	HYCHANG #	12/26/2023 5:23 PM	▼
<input checked="" type="checkbox"/>	002166		iew	賢司 山崎	DXC Temp	HYCHANG #	12/26/2023 5:17 PM	▼
<input checked="" type="checkbox"/>	002153		iew	賢司 山崎	DXC Temp	HYCHANG #	12/26/2023 1:25 PM	▼
<input checked="" type="checkbox"/>	002134	unbinding demo -003	Sales Review	Liu Yuntao	DXC Temp	v_mica #	12/26/2023 9:56 AM	▼
<input checked="" type="checkbox"/>	002133	unbinding demo -002	Sales Review	Liu Yuntao	DXC Temp	v_mica #	12/26/2023 9:51 AM	▼

Opportunity Admin select the Opportunities records that need to reassign

## Notes

- Note: Closed Opportunities cannot be reassigned

# Reassign Opportunity (For Opportunity Admin Only) (2)

## Notes

- ❑ Note: Closed Opportunities cannot be reassigned

Reassign Opportunity

Please select one record and click "Confirm" to continue

Name	Email
<input type="radio"/> [Name]	aiwen.chang@dxc.com
<input checked="" type="radio"/> Chen Gavin	gavin.chen2@dxc.com
<input type="radio"/> Huang Qi	
<input type="radio"/> Jiang Zhiwei	
<input type="radio"/> Li Muchun	
<input type="radio"/> Liu Yuntao	
<input type="radio"/> Xia Zetian	zetian.xiaz@dxc.com

Confirm

ntcdistiqas2.powerappsportals.com says Opportunities have been successfully reassigned.

OK

Select the person to whom you want to reassign opportunities

Click "Confirm"

Click "OK"

The system will pop-up messages to remind you that the opportunities have been successfully reassigned

# Export Opportunity (1)

Home | Opportunities | Download | Knowledge Article | Portal Accounts | English | Huang Qi

1 Expand the Opportunities menu and select "Opportunities"

2 Click "Export Data"

Process Status

Apply

Opp Portal View - Search Q Create

<input type="checkbox"/> Opportunity Id ↓	Project Description	Process Status ↓	Portal Owner	Portal Account	Nuvoton Sales	Status	Entry Date
<input type="checkbox"/> 002320	Test Demo 0102	Sales Review	Huang Qi	DXC Temp	v_gavinchen #	Open	1/2/20 4:24 PM
<input type="checkbox"/> 002319	test create1228	Sales Review	Huang Qi	DXC Temp	v_gavinchen #	Open	1/2/20 4:06 PM

## Notes

- Note: The exported data file contains all the Open Opportunities which were created by you

# Export Opportunity Product (1)

The screenshot shows the NuvoTon web portal interface. At the top, there is a navigation bar with links for Home, Opportunities, Download, Knowledge Article, Portal Accounts, English, and Huang Qi. Below the navigation bar, there is a dropdown menu for 'Opportunities' with three options: Opportunities, Opportunity Products, and Import Result. A red box highlights the 'Opportunity Products' option, with a circled '1' next to it. To the right of the dropdown menu, there are two buttons: 'Import Data' and 'Export Data'. A red box highlights the 'Export Data' button, with a circled '2' next to it. Below the buttons, there is a table with columns for Opportunity Product No., Product (Part No/GC Code) Text, and Product Line. The table contains several rows of data, including Opportunity Product No. 002217-1, 002081-1, 002086-1, 002129-1, 002133-1, 002134-1, 002227-1, 002235-1, 002292-1, and 002317-1. A red box highlights the 'Export Data' button with the text 'Click "Export Data"'. Another red box highlights the 'Opportunity Products' option with the text 'Expand the Opportunities menu and select "Opportunity Products"'. At the bottom of the table, there is a pagination bar with a blue circle containing the number '1' and arrows for navigation.

Opportunity Product No.	Product (Part No/GC Code) Text	Product Line
002217-1		CUC8BSC
002081-1		MMRBI0256 Won
002086-1	002086 Dummy Product pro001	MMRBI0256 Lost
002129-1	002129 W626C0157166	FNY3Y Open
002133-1	002133 W626C0157166	FNY3Y Open
002134-1	002134 A99148-018	FF101060SS Open
002227-1	002227 W83330DS	AMXPR Open
002235-1	002235 A99148-018	FF101060SS Open
002292-1	002292 W626C0157166	FNY3Y Design
002317-1	002317 A99148-018	FF101060SS Open

## Notes

- Note: The exported data file contains all the Opportunity products of the **Open** Opportunities that were **created by you**

# Opportunity Data Import Guide - D365 (1)

Native import have certain limitations:

- (1) All the business-related fields must be filled in the corresponding import template, if the fields are not filled, then the corresponding fields will be empty after creation;
- (2) If the fields have the specific logic, when import the data, if this field doesn't fill the value in the import template , the field will not be set the value according to the specific logic;
- (3) If the required fields are not filled in the import template, it still can be imported successfully.
- (4) For Opportunity/Opportunity Product import, follow the below steps:
  - **Data Update: Please do not modify columns A~D**

A	B	C	D
(Do No▼	(Do No▼	(Do Not Modify) Modified On ▼	Opportunity Id ▼

# Import Opportunity / Product (1)

1 Expand the Opportunities menu and select "Opportunities"

2 Click " Import Data"

3 Choose "Data Type " accordingly based on your imported file data

4 Click " Chose File" to select file from your local folder

5 Click " Submit"

## Notes

- ❑ Note: Only updated data is allowed to be imported, and new data is not allowed to be created.

# Import Opportunity / Product (1)

Home | **Opportunities** | Download | Knowledge Article | Portal Accounts | English | Huang Qi

Opportunities  
Opportunity Products  
**Import Result**

Reassign | Import Data | Export Data

1

Expand the Opportunities menu and select "Import Result"

Home | Opportunities | Download | Knowledge Article | Portal Accounts | English | Huang Qi

Name	Created On ↓	Result Type	Result
OpportunityProduct 2023-12-27 Currency USD.xlsx 12/28/2023 3:00 PM	12/28/2023 2:59 PM	Success	#Total Count:2 #Success Count:2 #Failed Count:0
Opportunity 2023-12-27 19_57_10.xlsx 12/27/2023 8:00 PM	12/27/2023 7:58 PM	Success	#Total Count:8 #Success Count:8 #Failed Count:0

View details

Find the data file name that you imported and click "View Details" to check error information if needed

Notes

# Opportunity Close- D365 (1)

## 1. Normal close:

When [Part Status] are all Won/Lost, and Approved, Opportunity will normal close.

## 2. Manually close

Sales click the "Close as lost" button in D365.

## 3. Automatically close:

Opportunity keeps open for specific period, Opportunity will close automatically.

- a. [Territory]="China", it will be automatically closed in 12 weeks;
- b. [Territory]<>"China", it will be automatically closed in 40 weeks.

# Oppty Notification - D365 (1)

Auto Close

Mail To: [Owner] of the Opportunity  
Mail Cc: [Portal Owner] of the Opportunity

Condition/Action	Notification Subject	Notification message	[Part Status]
[Territory]="China" & [Last Update Final] is 4 weeks ahead of today	Opportunity Auto Close Notification	This Opportunity has been opened more than 4 weeks. Please review with customer and update in system. System will move this Opportunity to close after 8 week(s).	Open
[Territory]="China" & [Last Update Final] is 8 weeks ahead of today	Opportunity Auto Close Notification	This Opportunity has been opened more than 8 weeks. Please review with customer and update in system. System will move this Opportunity to close after 4 week(s).	Open
[Territory]="China" & [Last Update Final] is 11 weeks ahead of today	Opportunity Auto Close Notification	Open case has been open more than 11 weeks. Please review with customer and update in system. System will move this Opportunity to close after 1 week(s).	Open
[Territory]="China" & [Last Update Final] is 12 weeks ahead of today	Opportunity Auto Close Notification	Open case has been open more than 12 weeks. System automatically close it as lost.	Open
[Territory]<>"China" & [Last Update Final] is 8 weeks ahead of today	Opportunity Auto Close Notification	Open case has been open more than 8 weeks. Please review with customer and update in system. System will move this Opportunity to close after 32 week(s).	Open
[Territory]<>"China" & [Last Update Final] is 16 weeks ahead of today	Opportunity Auto Close Notification	Open case has been open more than 16 weeks. Please review with customer and update in system. System will move this Opportunity to close after 24week(s).	Open
[Territory]<>"China" & [Last Update Final] is 32 weeks ahead of today	Opportunity Auto Close Notification	Open case has been open more than 32 weeks. Please review with customer and update in system. System will move this Opportunity to close after 8 week(s).	Open
[Territory]<>"China" & [Last Update Final] is 39 weeks ahead of today	Opportunity Auto Close Notification	Open case has been open more than 39 weeks. Please review with customer and update in system. System will move this Opportunity to close after 1 week(s).	Open
[Territory]<>"China" & [Last Update Final] is 40 weeks ahead of today	Opportunity Auto Close Notification	Open case has been open more than 40 weeks. System automatically close it as lost.	Open

# Oppty Notification - D365 (2)

Mail To: [Owner] of the Opportunity  
Mail Cc: [Portal Owner] of the Opportunity

## Milestone notification

Condition/Action	Notification Subject	Notification message	[Part Status]
[Mass Production Date] is 42 days ahead of today.	Opportunity Mass Production Date Notification	The [Mass Production Date] of this Opportunity is 42 days from now.	Open, Design-In, Won
[Mass Production Date] equals to today.	Opportunity Mass Production Date Notification	The [Mass Production Date] of this Opportunity is today.	Open, Design-In, Won

# Report



# Download all information reports

Opportunities

Opportunity Products  
Import Result

Import Data

Export Data

Import Data

Export Data

## Part Status

▼

Apply

All Opportunity Products

- Open Opportunities
- Closed Opportunities
- Design-In Opportunities
- Lost Opportunities
- Won Opportunities
- Alert Opportunities -Open more than 40 weeks
- Alert Opportunities -Open more than 12 weeks
- All Opportunity Products

Search



Download Report

No.	Product Line Id	Group ID (Product Line Id)	SBU (Product Line Id)	Product (Part No)
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# Portal Account & Sub Account Management



# Create Sub Account (Portal Account Admin Only) (1)

Disti. create sub account

The screenshot shows the Nuvoton portal account administration interface. The top navigation bar includes links for Home, Opportunities, Download, Knowledge Article, Portal Accounts, English, and Huang Qi. The main content area is titled 'Portal Account' and is divided into two sections: 'Account Info' and 'Disti Sub Account Apply'.

**Account Info**

- Account Name \*: DXC Temp
- Disti. Major Account: Huang Qi
- First Name \*: Huang
- Major Account Email \*: huang.qi@dxc.com
- Disti Email Domain \*: @dxc.com
- Sub Account Quota \*: 8
- Major Account Due Date: —

**Disti Sub Account Apply**

If you have created or updated sub-accounts, please remember to click the "Submit" button.

Buttons: Create, Submit

Disti. Type ↑	Apply Status	First Name ↑	Last Name	Email	
Major Account	Success	Huang	Qi	huang.qi@dxc.com	
Sub Account	Success	Chang	Aven	aiwen.chang@dxc.com	Yes
Sub Account	Success	Chen	Gavin	gavin.chen2@dxc.com	Yes
Sub Account	Success	Jiang	Zhiwei	zhiwei.jiang@dxc.com	Yes
Sub Account	Success	Li	Muchun	muchun.li@dxc.com	Yes
Sub Account	Success	Liu	Yuntao	yuntao.liu@dxc.com	Yes

## Notes

- ❑ Note: This menu (Portal Account) is only visible to Portal Account Admin

# Create Sub Account (Portal Account Admin Only) (2)

Disti. create sub account

Create

## Disti Portal Sub Account

Basic Info

3 **First Name \***  
George

**Last Name \***  
Green

**Email \***  
greengenogre@dxc.com

**Disti Type**  
Sub Account

**Job Title**  
[Empty]

**Mobile Phone**  
Provide a telephone number

**Login Status**

**Login Enable \***  
 No  Yes

**Input the mandatory fields**

Create

Provide a telephone number

Log in

Log in

Permissions

4 **Web Role**

Opportunity Admin x

Select or search options

Select all 5 items

Case Admin

Case Personnel

✓ Opportunity Admin

Opportunity Personnel

5 **Save**

**Click "Save"**

**Assign the web role of Oppty and Case for subaccount**

# Create Sub Account (Portal Account Admin Only) (3)

Disti. create sub account

Portal Account

### Account Info

**Account Name \***  
DXC Temp

**Disti. Major Account**  
Huang Qi

**First Name \***  
Huang

**Major Account Email \***  
huang.qi@dxc.com

**Disti Email Domain \***  
@dxc.com

**Sub Account Quota \***  
8

**Major Account Due Date**  
—

**Disti Sub Account Apply**

If you have created or updated sub-accounts, please remember to click the "Submit" button.

Click "Submit"

6

Create Submit

Disti. Type	Apply Status ↑	First Name	Last Name	Email	Login E
Sub Account	Draft	George	Green	greengenogre@dxc.com	Yes
Sub Account	Su				Yes
Major Account	Su				Yes
Sub Account	Su				Yes
Sub Account	Su				Yes
Sub Account	Success	Chen	Gavin	gavin.chen2@dxc.com	Yes

The newly created record will be displayed in the view and the [Apply Status] will be set to "Draft"

## Notes

- ❑ Note: The related job for the portal Account runs automatically every five minutes. Once completed, the Apply Status of the newly created record will be automatically updated to "success," and the corresponding Sub Account user will receive an invitation email
- ❑ The quantity of subaccounts that the portal account admin can create is controlled by the subaccount quota. If you need to create more subaccounts than the allocated quota, please contact Sales & IT to increase the subaccount quota

# Update Sub Account (Portal Account Admin Only) (1)

Disti. update sub account

## Account Info

### Account Name \*

DXC Temp

### Disti. Major Account

Huang Qi

### First Name \*

Huang

### Major Account Email \*

huang.qi@dxc.com

### Disti Email Domain \*

@dxc.com

### Sub Account Quota \*

8

### Disti Sub Account Apply

If you have created or updated sub-accounts, please remember to click the "Submit" button.

Create

Submit

Web Role	Job Run Result ↑	Created On	
Opportunity Admin	Account Update Success!	1/2/2024 1:35 PM	▼
Opportunity Admin	Major Account Update Success	12/11/2023 3:38 PM	▼
Opportunity Personnel; Training Course Only	Sub Account Update Success	12/11/2023 3:42 PM	Edit View details
Opportu			
Case Adr			

Find the subaccount you want to modify, click the arrow button to expand the dropdown menu, and select 'Edit'

## Notes

Mobile Phone: 12345678  
Contact: Huang Qi

Login Status  
Login Enable \*  
 No  Yes

Permissions  
Web Role: Opportunity Admin

Apply Status \*  
Success

Job Run Result  
Major Account Update Success

Save

Click "Save"

# Update Sub Account (Portal Account Admin Only) (2)

Disti. update sub account

Portal Account

## Account Info

**Account Name \***  
DXC Temp

**Disti. Major Account**  
Huang Qi

**First Name \***  
Huang

**Major Account Email \***

**Disti Sub Account Apply**

If you have created or updated sub-accounts, please remember to click the "Submit" button.

Disti. Type	Apply Status ↑	First Name	Last Name	Email	Login
Sub Account	Draft	Jiang	Zhiwei	zhiwei.jiang@dxc.com	Yes

Click "Submit"

The [Apply Status] of the modified record will be 'Draft'.



# FAQ

## FAQ For Portal

2024/3/14 revised

We compiled solutions to some common issues that Portal users have encountered recently and listed here for your reference.

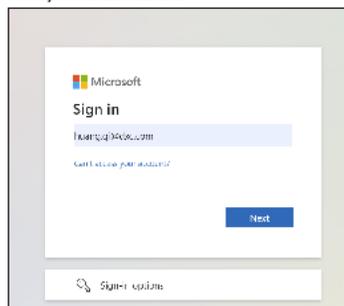
### 1. Why I cannot log in Disti. Portal?

- 1) If you log in, please ensure that your account is already created in the current PROD environment.
- 2) The Portal Account was created based on the user list provided by Ian. Please make sure that the email you used for logging in is the same one as you provided in user List.

### 2. When I received the email invitation for the portal, what should I use to log in?

The Portal account was created by the email address which you've provided.

- 1) If your account is already a Microsoft account: After entering your account, the page will directly turn to the corresponding organization for authentication. There is no separated password, it is the same as the one of your Microsoft account.





nuvoTon

**Thank You**

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# Q & A

