

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

BC30

2024.02.20



nuvoTon

Disti. Portal介紹

Opportunity視圖及功能按鈕

Portal Opportunity 操作指引

Portal 帳號 & 子帳號管理

01.

02.

03.

04.



Disti. Portal 介紹

Terms & Conditions(1)

第一次登入Disti. Portal

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。

16. 更多資訊
如您對蒐集、處理、利用您的個人資料或本政策有任何疑問，請聯絡我們。
< 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

Notes

1. 如果您是第一次登入 Disti Portal，系統將顯示隱私權政策。您需要向下捲動到底部，選擇 "I agree to these terms and conditions," 選項，然後按一下 "Continue" 以繼續登入
2. 「隱私權政策」僅在您首次登入時顯示，除非 NTC IT發布新的「隱私權政策」。在這種情況下，會彈出新的 "隱私權政策"，您需要再次接受它們

功能介紹 (1)

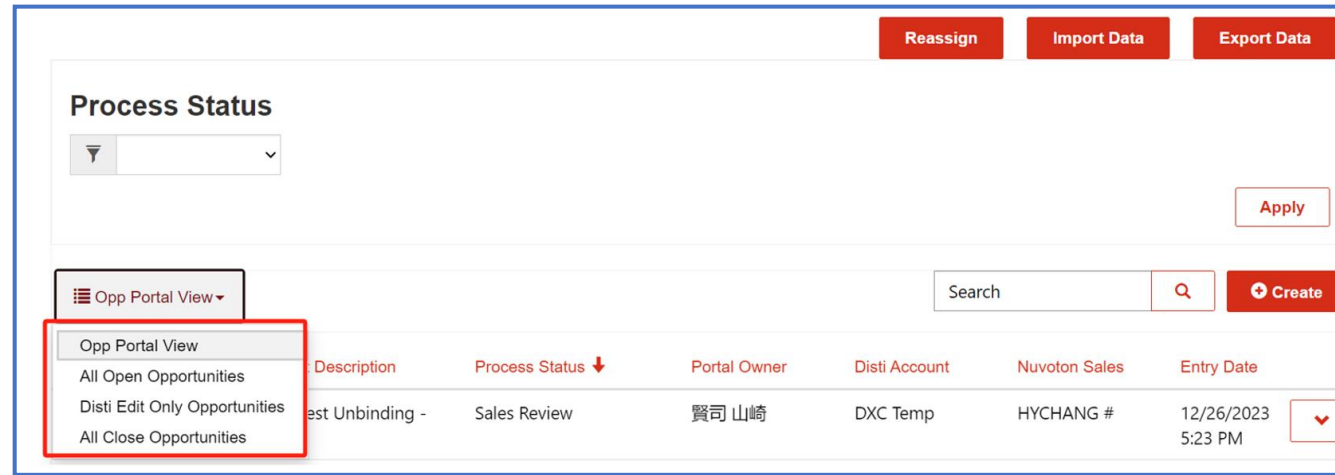


No	功能	描述
1	Opportunity	Disti 使用者可以創建、更新和管理Opportunity
2	Download	Disti 使用者可以在此處找到Opportunity和Opportunity Product 的標準導入範本與指南
3	Portal Accounts	Portal帳戶管理員可以在這裡管理子帳戶

Opportunity 視圖及功能按鈕



Opportunity 視圖 (1)



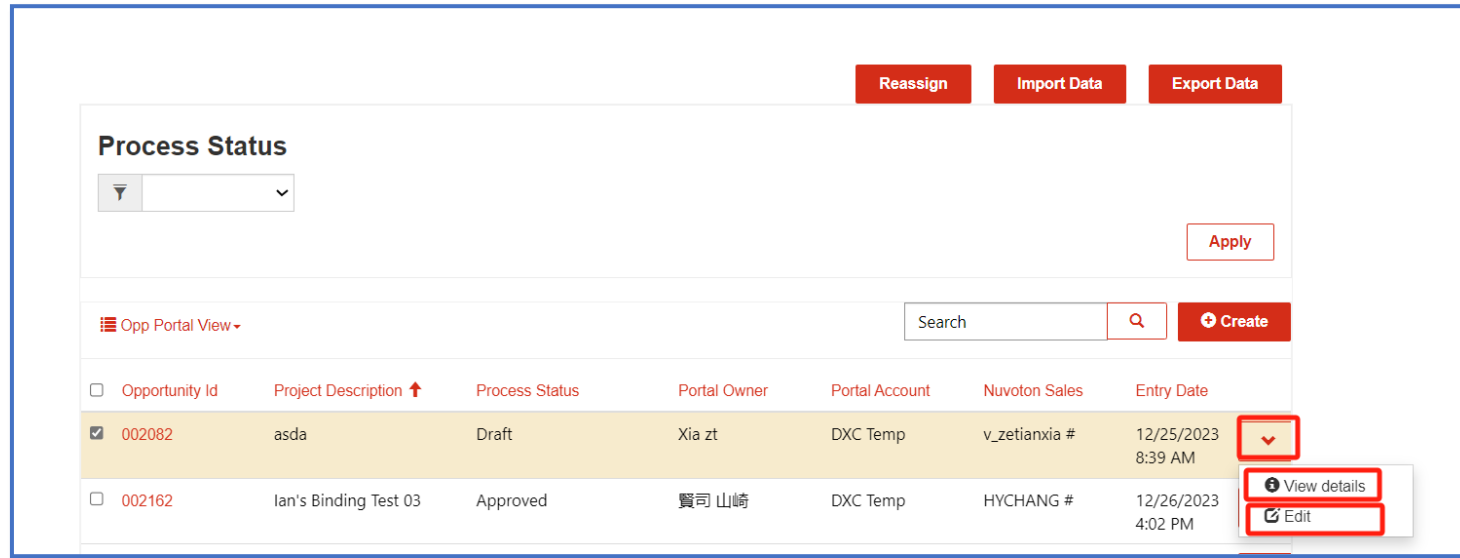
No	視圖名稱	描述
1	Opp Portal View	所有Opportunity (同一家公司內) 都列在這裡
2	All Open Opportunities	此處列出了[Opportunity status]= 'Open' 的所有機會 (同一公司內)
3	Disti. Edit Only Opportunities	這裡列出了所有可編輯的機會 - Opportunity Admin : 允許修改同一公司內其他人的Opportunity Opportunity Personnel: 只允許修改自己的機會
4	All Close Opportunities	這裡列出了所有已close的Opportunity

Function Button (1)

The screenshot displays a user interface for managing opportunities. At the top right, there are three red buttons: 'Reassign' (labeled 3), 'Import Data' (labeled 4), and 'Export Data' (labeled 5). On the left side, there is a 'Process Status' section (labeled 1) with a dropdown menu and an 'Apply' button. Below this, there is a search bar (labeled 2) with a magnifying glass icon and a 'Create' button (labeled 6) with a plus icon. The search bar contains the text 'Search'. At the bottom left, there is a 'Opp Portal View' dropdown menu.

- ❶ **Process Status:** Disti 可以過濾 Process Status 並點擊 “Apply” 來搜尋相應的 Opportunity
- ❷ **Search:** Disti 可以在搜尋框中輸入關鍵字，然後按一下 “Apply” / 放大鏡 圖示來搜尋 Opportunity
- ❸ **Reassign:** **Opportunity Admin** 可以重新分配 Opportunity。此按鈕僅有 Opportunity Admin 看的見
- ❹ **Import Data:** Disti 可以匯入 Excel 檔案來更新 Opportunity 和 Opportunity product
- ❺ **Export Data :** Disti 可以點選 “Export Data” 匯出 Opportunity 數據
- ❻ **Create:** Disti 可以點擊 “Create” 來創建一個新的 Opportunity

Function Button (2)



Reassign Import Data 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	Entry Date	
<input checked="" type="checkbox"/>	002082	asda	Draft	Xia zt	DXC Temp	v_zetianxia #	12/25/2023 8:39 AM	▼ View details Edit
<input type="checkbox"/>	002162	Ian's Binding Test 03	Approved	賢司 山崎	DXC Temp	HYCHANG #	12/26/2023 4:02 PM	

點擊下拉箭頭按鈕，會有兩個選項（只有當您有修改機會的權限時才會顯示"Edit"） **View details:**

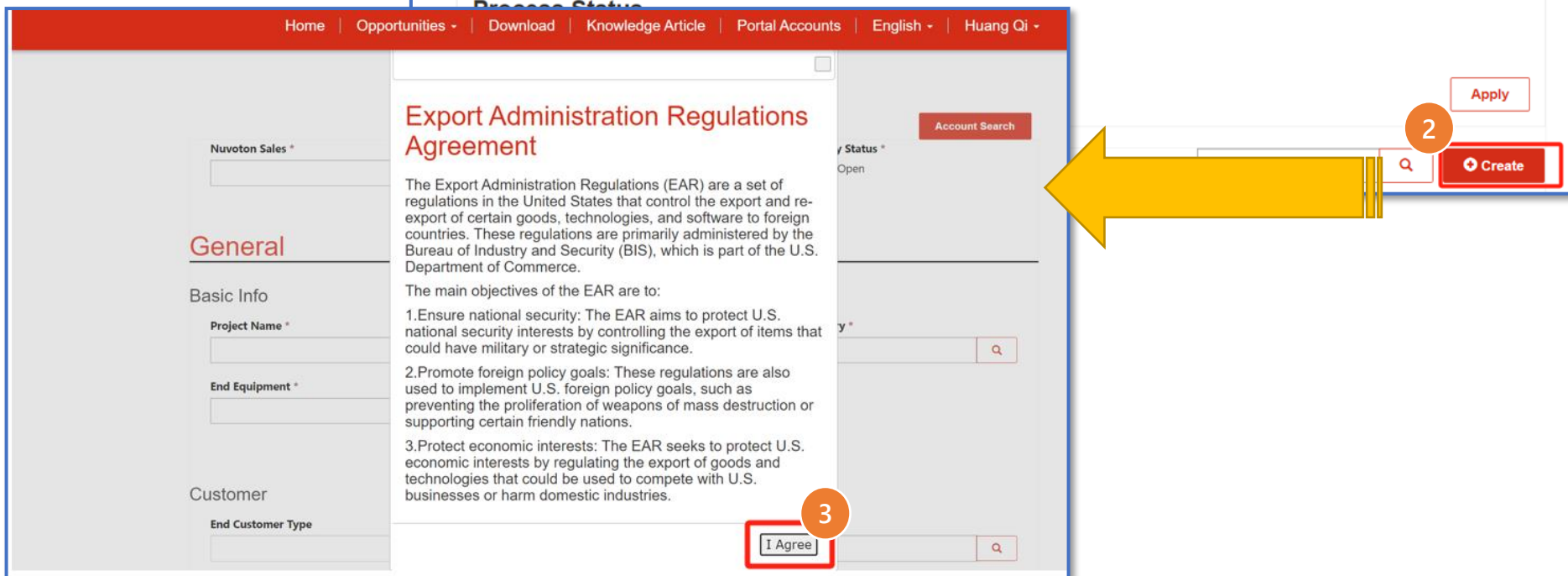
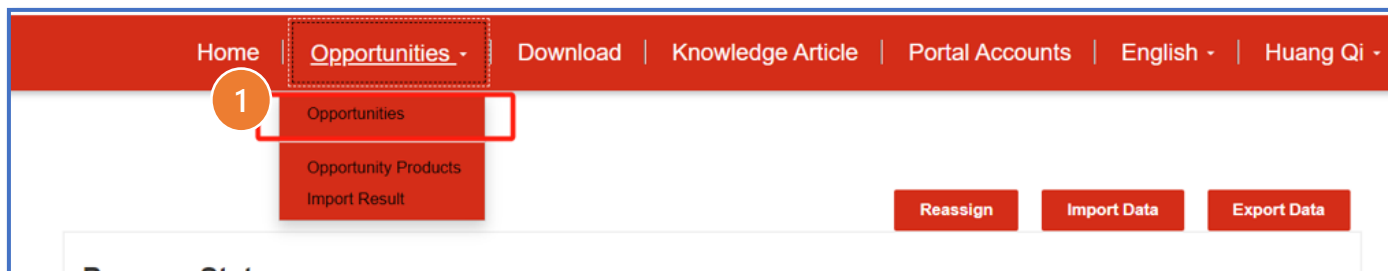
- 點擊 **"View details"**：將進入目前Opportunity的詳細資料表單，資料為唯讀
- 點擊 **"Edit"**：將您帶到目前Opportunity的詳細資料表單，但如果您相應權限，數據將是可被編輯的

Portal Opportunity 操作指引



Create Opportunity - Portal (1)

Disti. 創建 Opportunity



Notes

- 登入 Disti.Portal
- 展開Opportunities” 菜單 “並點擊 “Opportunities”
- 點選” Create” 按鈕
- 系統會彈出新的建立頁面，上面寫有「EAR Agreement」
- 點擊 “I Agree” 按鈕繼續創建新的 Opportunity



Create Opportunity - Portal (2)

Disti. 創建 Opportunity

4

5

6

Disti可以根據[Disti to Sales mapping]設定選擇負責Disti的Sales

Notes

- 如果您找不到 [NuvoTon Sales]的姓名，請直接與sales聯絡
- 可能的原因：
 - 1. Sales帳戶處於 inactive狀態
 - 2. 未配置 “Disti. to Sales Mapping”
- 一旦送出審核，如需要調整Sales也請連絡新的Sales或新唐系統負責人

Create Opportunity - Portal (3)

Disti. 創建 Opportunity – General section

General

Basic Info

Project Description * 7 最大長度: 40

Territory * 8 將用作[End Customer]的過濾條件

Sub Territory * 9

End Equipment * 10

Reference Design 11

No Yes

Currency *
USD

Notes

手動輸入必填欄位

- 對於 [Territory]和 [Sub Territory]，按一下「放大鏡」圖示以選擇數據
- 對於[Project Description]和[End Equipment]，在文字方塊中手動輸入資料

Create Opportunity - Portal (4)

Disti. 創建 Opportunity – Customer section

The screenshot shows the 'Customer' section of a portal. It contains the following fields and callouts:

- End Customer Type**: A dropdown menu with a callout '12' and a red box around 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' and a red box around a search icon (magnifying glass) on the right side.
- End Customer Layer 2 ***: A text input field.
- Sales Representative ***: A text input field.

Notes

- 對於 [End Customer Type]，下拉選項清單並選擇資料
- 對於 [Application]，點擊「放大鏡」圖示選擇數據

Create Opportunity - Portal (5)

Disti. 創建 Opportunity – Customer section

General

Basic Info

Project Description *

End Equipment *

Sub Territory *

Currency *

USD

Application *

Customer

End Customer Type

End Customer *

End Customer Layer 2 *

Distributor *

Sales Representative *

對於以下字段，點擊
“Account Search” 來選擇
相應的值：

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

14 Account Search

Notes

- ❑ [Account Search] 支持多語言查詢
- [Distributor] 和 [Sales Representative] 兩個欄位需擇一必填

Create Opportunity - Portal (6)

Disti. 創建 Opportunity – Customer section

Account Search

Please select one record and click "Set" to continue

15 Account Type: End Customer

16 Search: a

17 選擇數據記錄

IDB Code	Name	Name 1	Name 2	Territory
0110001010	(Block) Yantai Fuhuada	(Block) Yantai Fuhuada precision	(Block) Yantai Fuhuada precision	China/HK
0110000978	(Block)Ennoconn	(Block)Ennoconn	(Block)Ennoconn	China/HK
0110001251	Acision-Power	NANJING ACSION-POWER TECHNOLOGY CO.	Acision-Power	China/HK
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 點擊 "Set"

為 [End Customer] 或 [End Customer Layer 2] 選擇 Dummy Account

ntcdistiqas2.powerappsportals.com says

Dummy Account Added: DO NOT FORGET maintaining End Customer Text

Account Search

Please select one record and click "Set" to continue

Account Type: End Customer

Search: 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

End Customer *: Dummy Account

End Customer Layer 2 *: Dummy Account

End Customer Text *:

End Customer Layer 2 Text *:

Distributor *:

Application *: AAD4

Application Description: Automotive_ADAS_Face-ID

必填欄位。只有當您選擇dummy account時，這兩個欄位才會相應顯示

Notes


- 重複step 15 至 step18，設定[End Customer]、[End Customer Layer 2]、[Distributor] 和 [Sales Representative] 的值
- 如果您無法找到您想要的[End Customer] 和[End Customer Layer 2]的帳戶訊息，您可以選擇 "Dummy Account"，手動維護[End Customer Text]和 [End Customer Layer 2 Text]欄位

Create Opportunity - Portal (7)

Disti. 創建 Opportunity – “Fields only for Non-Japan Distributors” & “Remarks” se

Fields only for Non-Japan Distributors

Platform OS

  19

Remarks

Opportunity Remark 20

Previous Opportunity Remarks

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

Create Opportunity - Portal (8)

Disti. 創建 Opportunity – Milestones section

Milestones

Common

Mass Production Date * 23 Entry Date
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

Inquiry Received* (Open) M/D/YYYY

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

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

Opportunity Id
002292

Save 25

[Last Shipping Date]一定要大於[Mass Production Date]

Notes

- 輸入[Milestone]必填欄位
- 點選 “Save”
- ❑ Note: [Last Shipment Date] 的值大於 [Mass Production Date]，否則系統不會允許 “Save”
- 新Opportunity 儲存成功後，會自動產生該 Opportunity 的 [Opportunity ID]

Create Opportunity - Portal (9)

Disti. 創建 Opportunity – Product section

Product

點擊Product section
中的“Create”按鈕

26

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

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"/>	—

系統會彈出新視窗

Create Opportunity - Portal (10)

Disti. 創建 Opportunity – Product section

Product Line Id: FF102LOG

ASP *: 55

Product (Part No/GC Code) *: BT013A

Currency: USD

AMT: —

AMT(JPY): —

AMT(USD): —

Part Status *: Open

Competitor: —

Compt.Price: —

Design In Date: —

Won/Lost Date: —

按一下“放大鏡”圖示選擇產品 (Part No/GC Code)。 [Product Line Id]將自動相應填寫

為 [Product (Part No/GC Code)] 選擇 Dummy Product

Product Line Id *:

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

Currency: USD

Product (Part No/GC Code) Text *:

Note: 如果您選擇 Dummy Product 作為 [Product (Part No/GC Code)]，則必須在建立表單中手動維護 [Product (Part No/GC Code)] Text] 並手動選擇 [Product line Id]

Notes

- 只有當您選擇 Dummy Product 時，此欄位 [[Product (Part No/GC Code)] Text] 才會相應顯示

Create Opportunity - Portal (11)

Disti. 創建 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 輸入其餘必填字段

Create

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 點擊 "Save"

Notes

- Part status在一開始只能選擇Open階段，送審至Sales並由Sales送審給他的主管審核後(亦即Process status = Approved)時，Open的狀態才可以進入下個階段即Design-in或Lost

Create Opportunity - Portal (12)

Disti. 創建 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

Pr

17,600

新建立的opportunity product記錄將顯示在product view中，並自動計算相關的[Project Total QTY]和[Project Total AMT]

Save

30

Submit to Sales

點擊 "Submit to Sales"

Notes

- 點擊 "Submit to Sales" (Opportunity status將自動更新為 "Sales review" ，並且此Opportunity 將不允許Disti再對其進行編輯，直至其被Sales "Approved/Rejected" 從BPM或退回 "back to Disti")
- Note: 在將此 opportunity 提交給 sales之前，請確保您已為opportunity 添加了至少一種產品；否則系統將不允許您提交



Unbind Validation- Portal (1)

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

[View Audit](#)

Opportunity Id
002320

Nuvoton Sales * v_gavinchen # **Process Status *** Sales Review **Opportunity Status *** Close Open

General

Basic Info

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

Customer

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

Notes

- 如果 [End Customer] 和 [End Customer Layer 2] 正被另一個 Disti 公司使用，當您點擊“Submit to Sales”時，系統會彈出一條訊息提醒您“ This Opportunity is bound by another Disti. and cannot be submitted, please contact [Nuvoton Sales] for details”



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

- 如果新建立/更新的 Opportunity 與另一個機會具有相似的 [Project Description]、相同的 [End Customer]、[End Customer Layer 2] 和 [Product (Part No/GC Code)]，又是同一 Distri 公司用戶，當您點擊 'Submit to Sales' 時，系統會彈出一則訊息：
"This Opportunity is a conflict"

Update Opportunity (1)

更新可編輯的欄位

點擊 "Save"

點擊 "Submit to Sales"

點擊 "Edit"

Order 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	Project Total AMT	Project Total AMT(TWTD)	Project Total AMT(JPY)	Project Total AMT(USD)
800	17,600.00	546,040	2,376,000	17,600

Notes

- 找到您要編輯的記錄
 1. 按一下下拉箭頭
 2. 點擊 "Edit"
- Note:
 - Opportunity Admin : 允許修改由同一帳戶使用者建立的所有 Opportunity (其中 Opportunity Process status = "Draft" / "Editing" / " Approved" / " Rejected)
 - Opportunity Personnel : 只允許修改自己建立的機會 (其中 Opportunity Process status = "Draft" / "Editing" / " Approved" / " Rejected)

Update Opportunity Product (1)

Notes

1. 點擊 "Edit" 並更新可編輯字段
 2. 點選 "Save"
 3. 點擊 "Submit to Sales"
- ❑ Noted: 在 "Create" 或 "Edit" 產品記錄之前，請按一下 "Save" 以儲存對opportunity的變更。否則您將丟失所做的更改

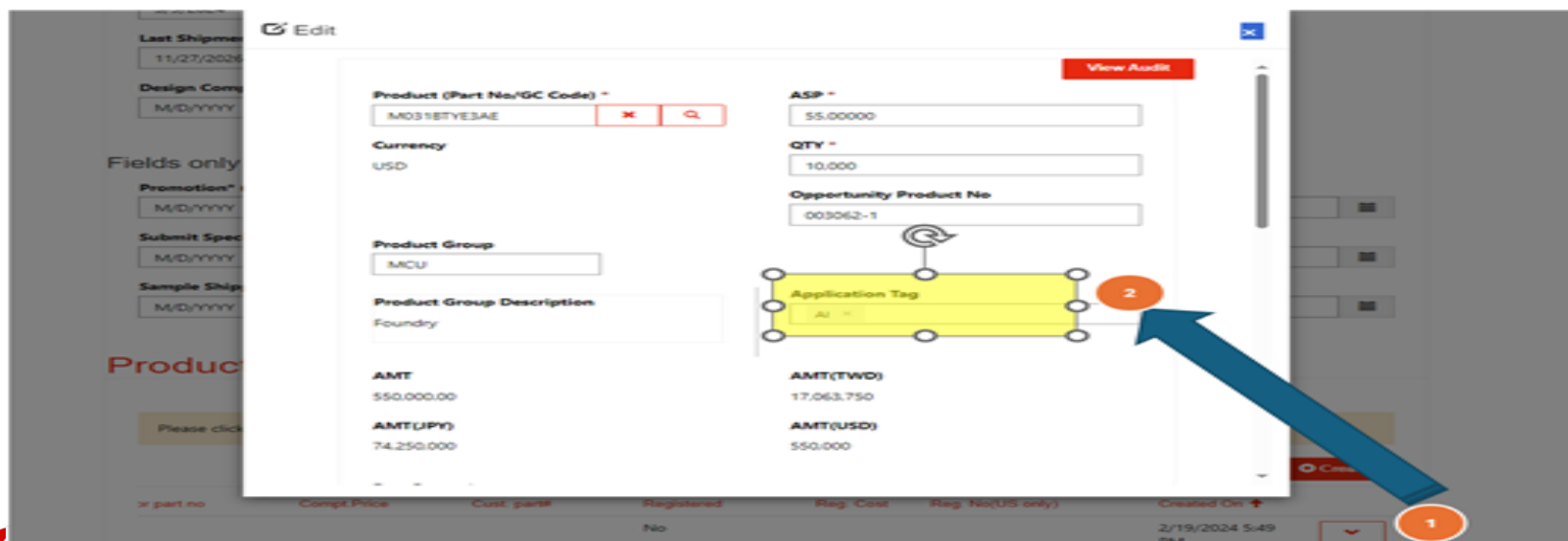
Product

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

The screenshot shows a web interface for editing a product record. A yellow box at the top contains a warning message. The main form has several input fields: 'Cust. part#' (with a red box around it), 'Reg. Cost', 'Competitor part no', 'Part Remark', 'Unit *' (set to 'Primary Unit'), 'Reg. No(US only)', and 'Opportunity Product Status' (set to 'HasBeenApproved'). A red box highlights the 'Edit' button, with a callout '1' and the text '點擊 "Edit"'. A yellow arrow points from the 'Edit' button to the 'Cust. part#' field, with a callout '更新可編輯字段 E.g.: Part Status'. A red box highlights the 'Save' button, with a callout '2' and the text '點擊 "Save"'. A yellow arrow points from the 'Save' button to the 'Submit to Sales' button, with a callout '3' and the text '點擊 "Submit to Sales"'. A red box highlights the 'Submit to Sales' button.

Update Opportunity Product (2)

- 請於填寫Opportunity訊息時，於 " Application Tag " 確認是否為AI相關應用。
 - Product (Part No/GC Code)如在系統中被新唐定義為AI產品，將會自動出現AI 標記，如判斷非與AI相關，可移除該標記。
 - Product (Part No/GC Code)如在系統中被新唐不被定義為AI產品，可自行加入AI 標記。
- 目前僅定義M55M1為AI產品



View Audit – Check update details (1)

Notes

- 點擊 “View Audit” ，彈出查看審核視窗；頁面中列出了所有更新的記錄

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)

The screenshot displays the 'Opportunity Admin' interface. At the top, there are three buttons: 'Reassign', 'Import Data', and 'Export Data'. Below these is a 'Process Status' dropdown menu and an 'Apply' button. A search bar and a 'Create' button are also visible. The main area contains a table of opportunities with columns for 'Opportunity ID', 'Project Description', 'Process Status', 'Portal Owner', 'Portal Account', 'Nuvo Sales', and 'Entry Date'. The first row is highlighted, and a red box surrounds the 'Reassign' button and the first row. A callout box points to the first row with the text: 'Opportunity Admin選擇需要重新分配的Opportunity'.

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

Notes

- Note: 已Close的 Opportunity無法重新分配

Reassign Opportunity (For Opportunity Admin Only) (2)

Notes

- ❑ Note: 已Close的 Opportunity無法重新分配

Reassign Opportunity

Please select one record and click "Confirm" to continue

Name	Email
Chen Gavin	gavin.chen2@dx.com
Huang Qi	
Jiang Zhiwei	
Li Muchun	
Liu Yuntao	yuntao.liu@dx.com
Xia Zetian	zetian.xia2@dx.com

選擇您想要重新分配的人

4 點擊 "Confirm"

5 點擊 "OK"

系統會彈出訊息提醒您機會已成功重新分配

Export Opportunity (1)

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

Opportunities
Opportunity Process
Import Result

展開“Opportunities”選單
並選擇 “Opportunities”

Reassign | Import Data | **Export Data**

點擊 “Export Data”

Process Status

▼

Apply

Opp Portal View - Search [] [] [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: 匯出的資料檔案包含您創建的所有Open Opportunities

Export Opportunity Product (1)

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

1 Opportunities
Opportunity Products
Import Result

2 Import Data Export Data

展開Opportunities選單並選擇“Opportunity Products”

點擊“Export Data”

Opportunity Product No.	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

< 1 2 3 4 >

Notes

- Note: 匯出的資料檔案包含您創建的Open Opportunities的所有Opportunity products

Opportunity Data Import Guide - D365 (1)

原生導入有一定的限制：

- (1) 對應的導入模板中所有與業務相關的欄位都必須填寫，如果沒填入欄位，那麼創建後對應的欄位值將為空；
- (2) 如果欄位有特定的邏輯，在匯入資料時，如果該欄位沒有填入匯入範本中的值，則該欄位不會依照特定的邏輯去產生值；
- (3) 如果匯入模板中沒有填寫必填欄位，仍然可以匯入成功
- (4) 對於Opportunity/Opportunity Product產品導入，請按照以下步驟操作:
 - Sales導入Opportunity資料
 - Opportunity建立成功後，Sales需要記錄Opportunity ID
 - 匯入Opportunity Product數據，在Opportunity Product匯入範本中，使用者需要填寫Opportunity ID以與相應的機會產品關聯
 - **Data Update: 請不要更改columns A~D**

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

Import Opportunity / Product (1)

Notes

- ❑ Note: 只准許透過匯入更新資料，不准許創建新資料

1 Opportunities - Download | Cases | Knowledge Article | Portal Accounts | English - |

Ian Cha Opportunities
Opportunity Prod
Import Result

展開"Opportunities"選單
並選擇 "Opportunities"

2 Reassign Import Data Export Data
點擊 " Import Data "

Import Data

3 Data Type * 根據您匯入的文件資料相應選擇 "Data Type "

Opportunity
Opportunity Product

4 Attach a file * 點擊 " Chose File " 從本機資料夾中選擇文件
Choose File

5 Submit 點擊 " Submit "

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 展開Opportunities選單並選擇“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

找到您匯入的資料檔案名，如果需要，點擊“View Details”查看錯誤訊息

Notes

Opportunity Close- D365 (1)

1. Normal close:

當[Part Status]全部為Won/Lost並被批准時，Opportunity 將正常關閉

2. Manually close

Sales點選 D365 中的「Close as lost」按鈕

3. Automatically close:

Opportunity有Part Status = Open的產品且在特定時間內沒有任何更新，機會將自動關閉

- a. [Territory]= "China" , 12週後自動關閉
- b. [Territory]<>" China" , 40週後將自動關閉

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)
-----	-----------------	----------------------------	-----------------------	-------------------

Portal帳號&子帳號管理

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

Disti. 創建 sub account

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

點擊“Portal 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.

Create Submit

點擊“Create”

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:** 僅Major Account能看到Portal Account選單

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

Disti. 創建 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
輸入必填字段

Disti
DXC Temp

Mobile Phone
Provide a telephone number

Contact
—

Login Status

Login Enable *
 No Yes

Create

Provide a telephone number

Login

Log

O

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** 點擊“Save”

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

Disti. 創建 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.

點擊 "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	Success	Jiang		jiang@dxc.com	Yes
Major Account	Success	Qi		qi@dxc.com	Yes
Sub Account	Success	Xia	Zetian	zetian.xia2@dxc.com	Yes
Sub Account	Success	Liu	Yuntao	yuntao.liu@dxc.com	Yes
Sub Account	Success	Chen	Gavin	gavin.chen2@dxc.com	Yes

新建立的記錄將顯示在 view list 中，並且 [Apply Status] 將設定為 "Draft"

Notes

- ❑ Note: Portal Account的相關job每五分鐘自動執行一次。完成後，新建立記錄的申請狀態將自動更新為 "Success"，對應的 Subaccount將收到一封邀請郵件
- ❑ Note: Portal account admin可以建立的subaccount是有數量限制的。如果您需要建立的 subaccount數量多於分配的配額，請聯絡NTC Sales和 IT 部門以增加 subaccount配額

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

Disti.更新 subaccount

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
Opportunity Admin	Sub Account Update Success		▼
Case Admin; Opportunity Admin	Sub Account Update Success		▼

Edit

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

點擊 "Save"

找到您要修改的subaccount，按一下箭頭按鈕展開下拉式選單，然後選擇 "Edit"

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

Disti. 更新 subaccount

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.

Create **Submit**

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

點擊 "Submit"

2

更新subaccount的資訊[Apply Status]將變為 '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.

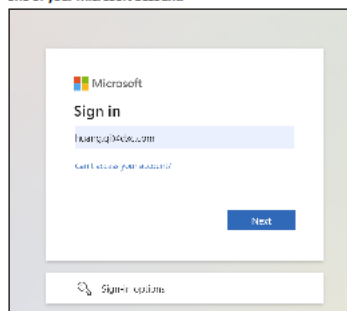
1. Why I cannot log in Disti. Portal?

- 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.





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Thank You

Q & A

