

# Perfion Partner demo server setup

## Perfion 2025-R3

Go through the steps below to install and configure your local Perfion demo setup.

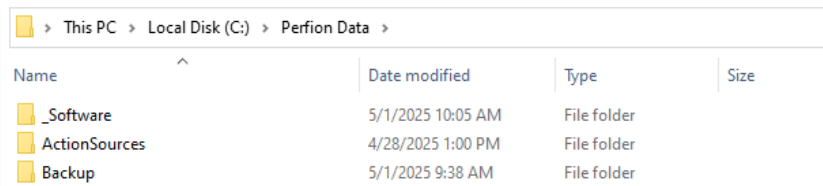
*NOTE: The Perfion Partner demo setup includes BC and SAP databases but not BC and SAP applications or license files. If you restore the BC and SAP databases as instructed below, without installing BC or SAP applications, you will be able to run “ERP first” demos. If you want to run “PIM first” demos, you must install BC and/or SAP applications yourself including the addons “Release2BC” and/or “Release2SAP”.*

## Installation

Follow these steps to install the Perfion software suite.

### 1. Unzip the provided Perfion data package

- Unzip the provided zip-file to C:\Perfion Data

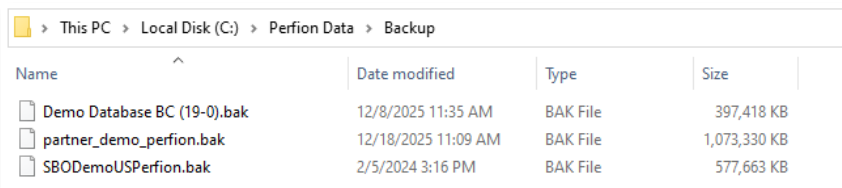


A screenshot of a Windows File Explorer window showing the contents of the 'Perfion Data' folder on the local disk (C:). The breadcrumb path is 'This PC > Local Disk (C:) > Perfion Data'. The table below lists the files and folders:

Name	Date modified	Type	Size
_Software	5/1/2025 10:05 AM	File folder	
ActionSources	4/28/2025 1:00 PM	File folder	
Backup	5/1/2025 9:38 AM	File folder	

### 2. Restore databases

- Restore Perfion, BC and SAP databases using the backup files in C:\Perfion Data\Backup
- *NOTES: SQL Server 16 or newer required*



A screenshot of a Windows File Explorer window showing the contents of the 'Backup' folder within 'Perfion Data' on the local disk (C:). The breadcrumb path is 'This PC > Local Disk (C:) > Perfion Data > Backup'. The table below lists the backup files:

Name	Date modified	Type	Size
Demo Database BC (19-0).bak	12/8/2025 11:35 AM	BAK File	397,418 KB
partner_demo_perfion.bak	12/18/2025 11:09 AM	BAK File	1,073,330 KB
SBODemoUSPerfion.bak	2/5/2024 3:16 PM	BAK File	577,663 KB

### 3. Download Perfion applications

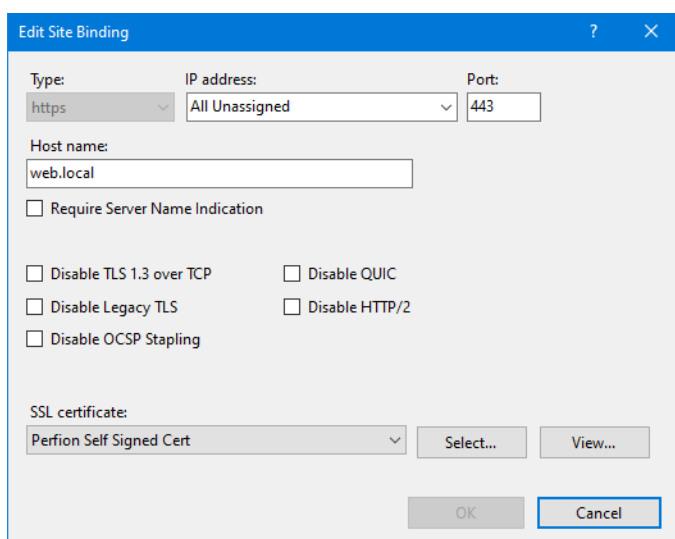
- Go to [Perfion Download Centre](#)
- Download the following applications:
  - Perfion Windows Client
  - Perfion Web Client
  - Perfion Supplier Portal
  - Perfion Application Server
  - Perfion API

#### 4. Install Perfion Windows Client

- Install Perfion Windows Client in default location
- Connect to the restored Perfion demo database

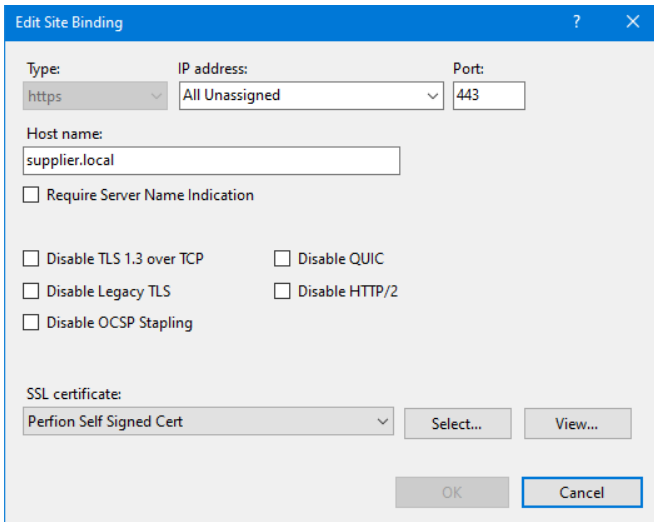
#### 5. Install Perfion Web Client

- Install Perfion Web Client as a new site
- Installation guide can be found at [Perfion Knowledge Base – Web Client Installation Guide](#)
- Make sure to set up the IIS website with **HTTPS port 443** and **host name web.local**
  - *Certain configurations in the demo database only work when the Perfion Web Client is installed with these settings*



#### 6. Install Perfion Supplier Portal

- Install Perfion Supplier Portal
- Installation guide can be found at [Perfion Knowledge Base - Supplier Portal Installation](#)
- Make sure to set up the IIS website with **HTTPS port 443** and **host name supplier.local**
  - *Certain configurations in the demo database only work when the Perfion Supplier Portal is installed with these settings*

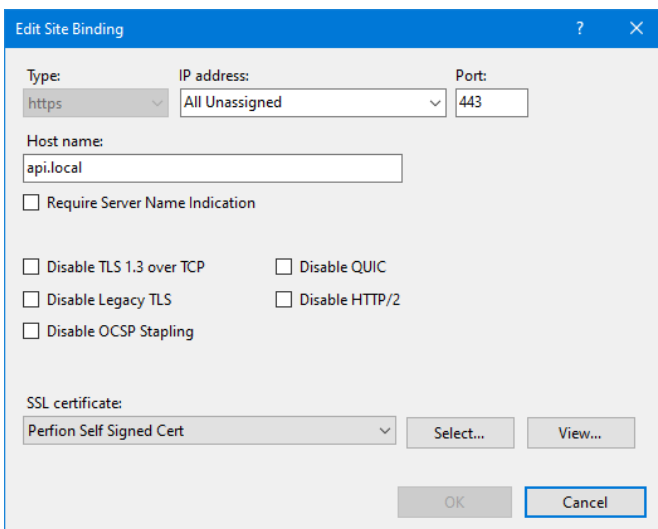


## 7. Install Perfion Application Server

- Install the Perfion Application Server as a service or as a console app
- Installation guide can be found at [Perfion Knowledge Base – Application Server](#)

## 8. Install Perfion API

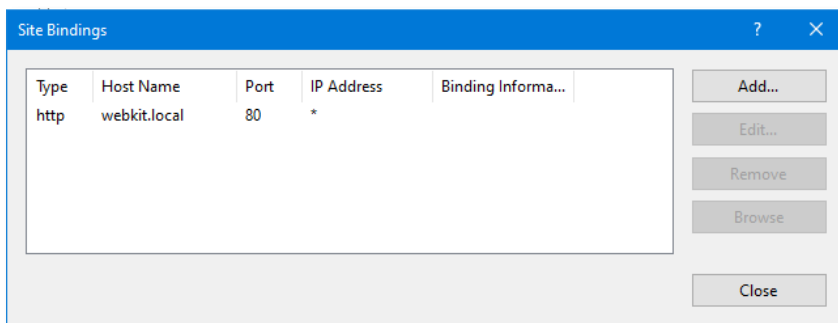
- Install Perfion API
- Installation guide can be found at [Perfion Knowledge Base - Perfion Knowledge Base](#)
- Make sure to set up the IIS website with **HTTPS port 443** and **host name supplier.local**
  - *Certain configurations in the demo database only work when the Perfion Supplier Portal is installed with these settings*



## 9. Install Perfion Web Kit

*NOTE: The Perfion Web Kit is not needed if you use Shopify in your demos. It is only provided as backup.*

- Unzip C:\Perfion Data\\_Software\Perfion.WebKit [version].zip
- Copy all files to C:\inetpub\PerfionWebKit
- Update connection string in Web.config to your local Perfion database
- Create new website in IIS and link to C:\inetpub\PerfionWebKit
- Make sure to set up the IIS website with **HTTP port 80** and **host name webkit.local**
  - *Certain configurations in the demo database only work when the Perfion Web Kit is installed with these settings*



## 10. Install Perfion-Shopify connector

- Unzip C:\Perfion Data\\_Software\Shopify.zip
- Copy all files to C:\Perfion Data\Shopify
- Follow separate Shopify Setup guide to configure connector

## 11. Update Hosts file

- Go to C:\Windows\System32\drivers\etc and open the "hosts" file
- Add these three settings to the file:
  - 127.0.0.1 web.local
  - 127.0.0.1 webkit.local
  - 127.0.0.1 supplier.local

```
*hosts - Notepad
File Edit Format View Help
# Copyright (c) 1993-2009 Microsoft Corp.
#
# This is a sample HOSTS file used by Microsoft TCP/IP for Windows.
#
# This file contains the mappings of IP addresses to host names. Each
# entry should be kept on an individual line. The IP address should
# be placed in the first column followed by the corresponding host name.
# The IP address and the host name should be separated by at least one
# space.
#
# Additionally, comments (such as these) may be inserted on individual
# lines or following the machine name denoted by a '#' symbol.
#
# For example:
#
# 102.54.94.97    rhino.acme.com      # source server
# 38.25.63.10    x.acme.com          # x client host

# localhost name resolution is handled within DNS itself.
#   127.0.0.1    localhost
#   ::1          localhost
|
127.0.0.1    web.local
127.0.0.1    webkit.local
127.0.0.1    supplier.local

Ln 22, Col 1    100%    Windows (CRLF)    UTF-8
```

## Configuration and personalization

Follow these steps to configure and personalize your Perfion demo setup.

### 1. Load Perfion license

- Obtain a Perfion partner license via [Boyum IT Partner Portal](#)
- Start Perfion Windows Client and load license. Login credentials:
  - Username: admin
  - Password: kaffethe

The screenshot shows the 'License Management' dialog box. It contains the following sections:

- License Key Information:** Fields for Name and Key.
- \*\* Consultant License \*\*:** ID: 0012000001iBQUjAAO, Perfon Edition: Enterprise, Created Date: 11/12/2023, Expiration Date: 29/1/2025.
- Perfon:** Tabs for ERP, Connectors, and Portals.
- Basic - Number of:** Editors: 100, Channels: 100, Readers: 100, Languages: 100.
- Modules included in license:** A list of modules with checkboxes, all of which are checked: Perfon API, Enterprise Security, Actions, Logging, Ecommerce API, Deployment, Print/Publishing, Scheduling, Table Designer, and Asset Cloud.
- Buttons:** Load License File, Download License, OK, and Cancel.

### 2. Reactivate your content store

- The unique key to your content store must be added to the demo database.
- Please contact **Perfion Support** for assistance.

### 3. Change to your preferred language

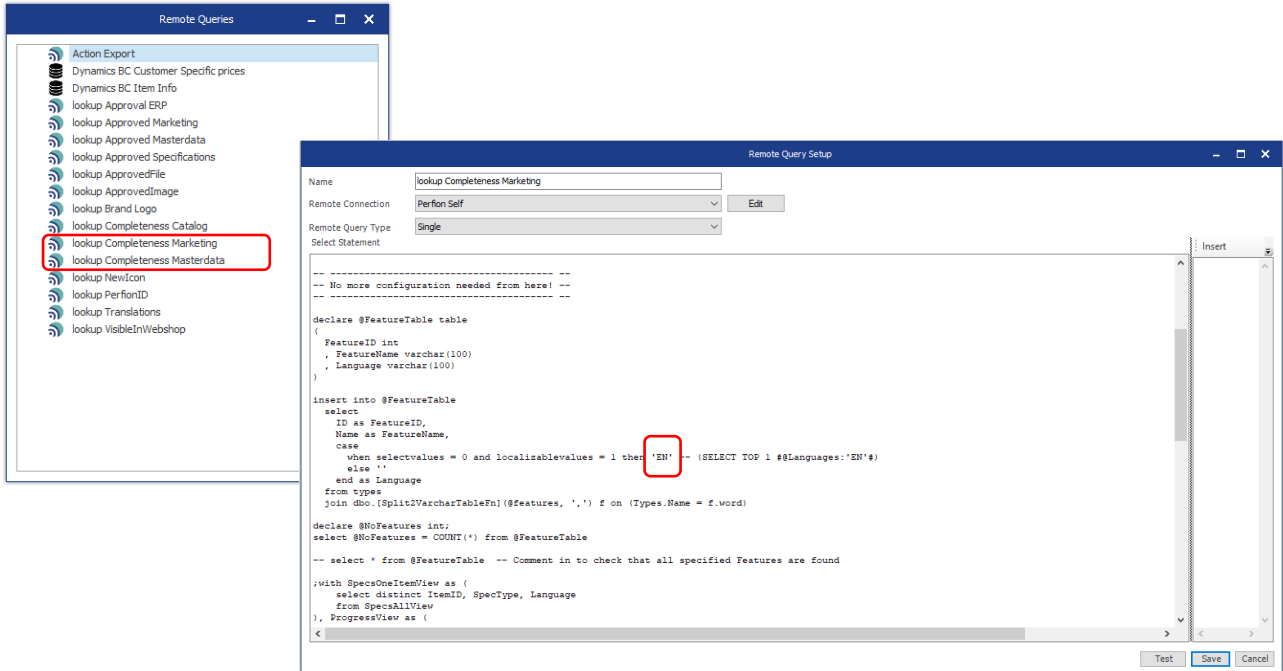
Perfion demo database is default set up to operate in English. Other supported languages are German, Dutch, French, Spanish and Italian. Skip these steps if you plan to run demos in English.

- In web client, log in with admin user and change **data language** and **interface language** to your preferred language
- Log in to supplier portal with both users below and change **data language** and **interface language** to your preferred language:
  - perfionsupplierEN1@boyum-it.com / PerfionDemo23
  - perfionsupplierEN2@boyum-it.com / PerfionDemo23
- Change language in **webkit** config file C:\inetpub\PerfionWebKit\Web.config (line 4)

#### 4. Configure “completeness scores” to operate in your preferred language

Completeness scores are set up to check EN values in localizable fields. You need to modify the related Remote Queries if you plan to run demos in German, Dutch, French, Spanish or Italian.

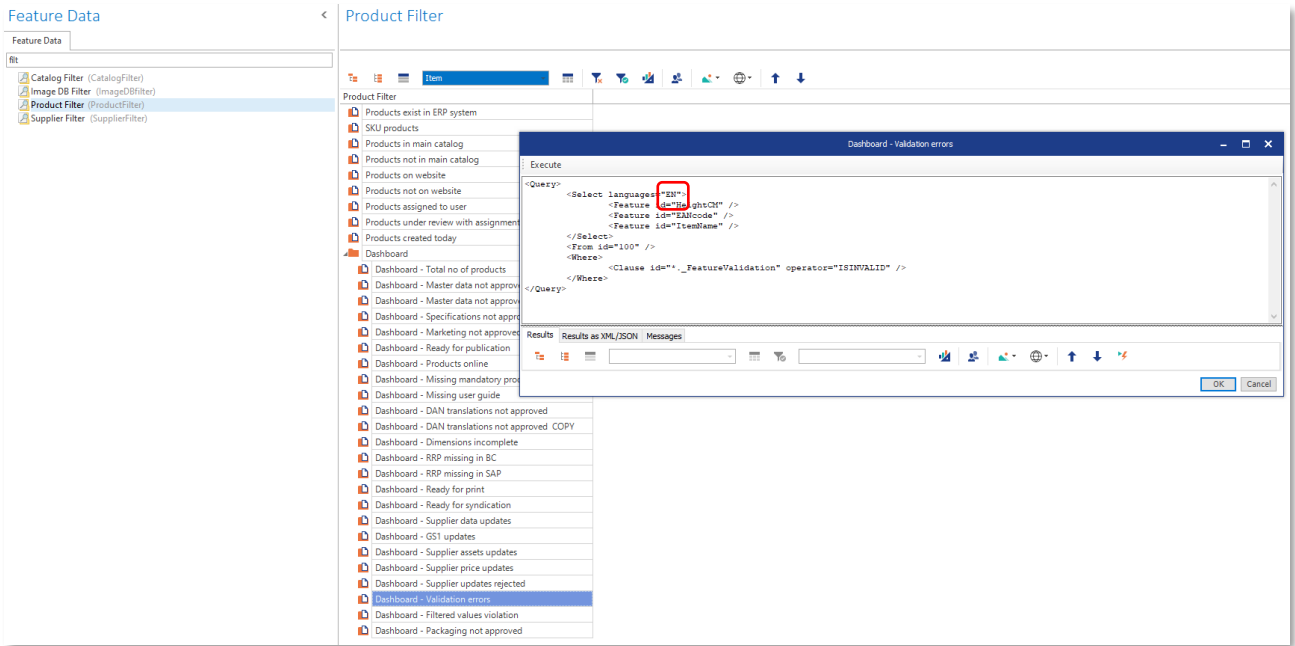
- Go to Remote Queries and update language code in the two indicated completeness queries
- In code, change EN to your preferred language code



#### 5. Configure Quality dashboard (validation errors) to operate in your preferred language

The widget “Validation errors” on the Quality dashboard is set up to check EN values in localizable fields. You need to modify the related Search Query if you plan to run demos in German, Dutch, French, Spanish or Italian.

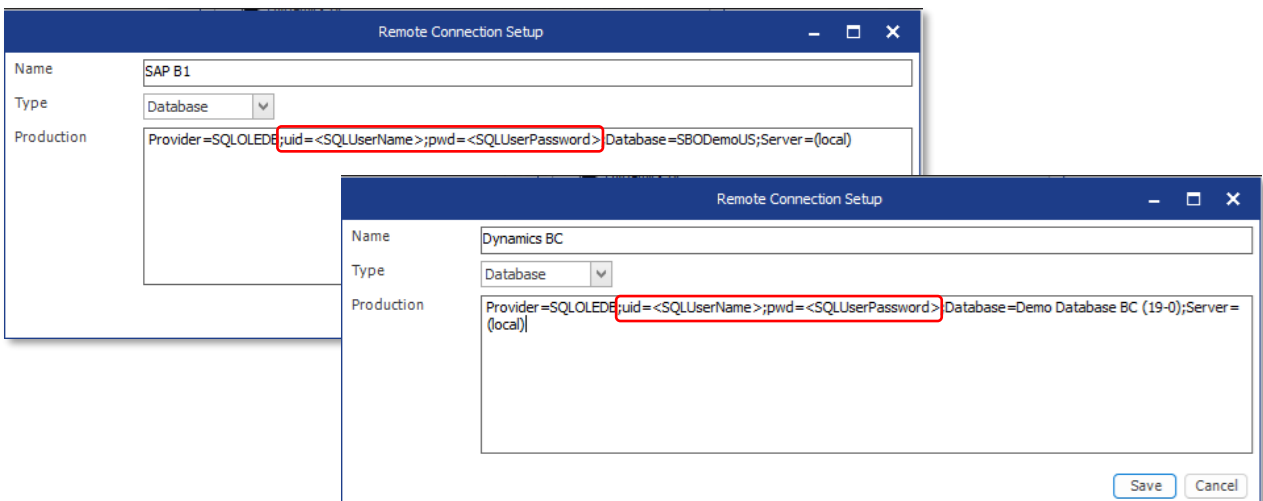
- Go to Feature Data and find **ProductFilter**
- Edit query for item **Dashboard – Validation errors**
- Change language in query from **EN** to **DE/NLD/FR/ES/ITA**



## 6. Configure SAP and BC remote queries

SAP and BC remote queries are “neutralized” in the provided Perfion database. You must configure these to connect to the restored SAP and BC databases.

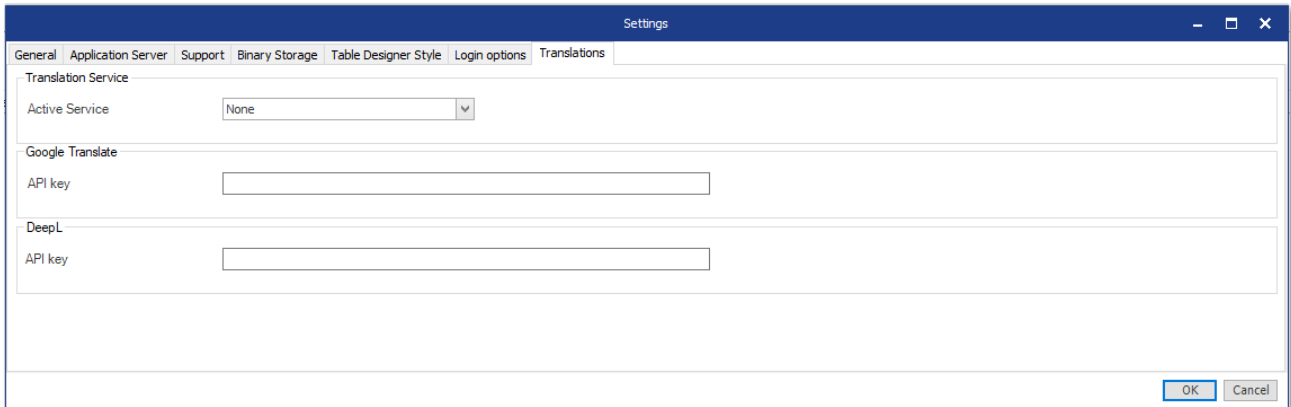
- Go to Administration -> Remote Connections
- Open “SAP B1” and “Dynamics BC” and update SQL user id and SQL password with valid credentials to your SQL server:



## 7. Insert DeepL translation key

To demonstrate Perfion's automated translation capabilities you need to load a DeepL (or Google Translate) key into Perfion.

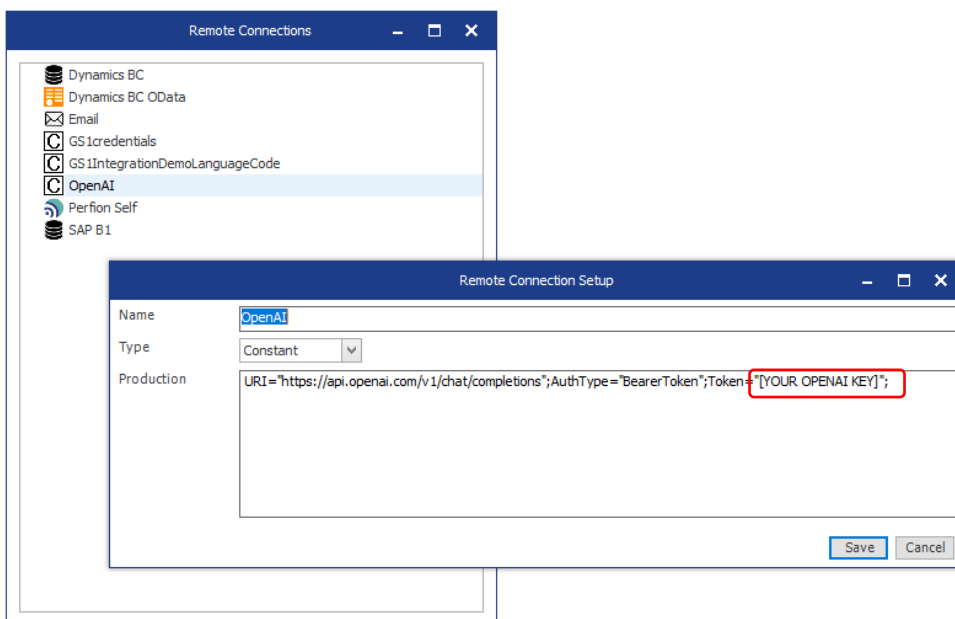
- Visit <https://www.deepl.com/pro-api?cta=header-pro-api> and sign up for an API key
- Go to Administration -> Settings -> Translation and load the API key



## 8. Insert OpenAI API key

Demo server contains two actions, that generate English product descriptions via integration with OpenAI. The two OpenAI actions require an OpenAI API key to work.

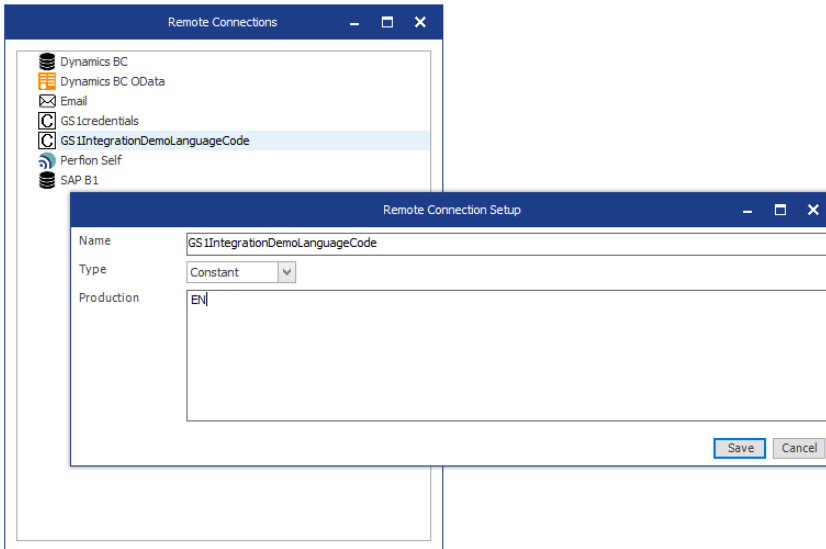
- Visit <https://openai.com/> and sign up for an API key
- Go to Administration -> Remote Connections and find OpenAI
- Insert your OpenAI Key where indicated below



## 9. Configure GS1 demo to operate in your preferred language

You need to modify the GS1 language if you plan to run demos in German, Dutch, French, Italian or Spanish. You can skip these steps if you plan to run demos in English.

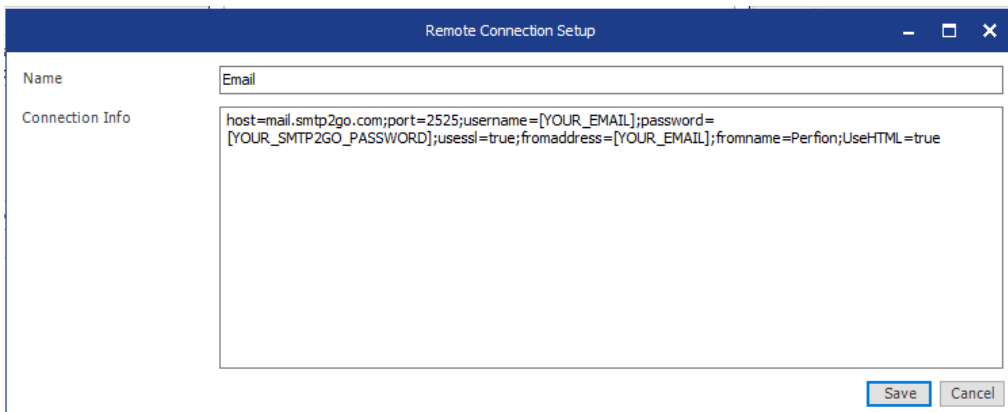
- Go to Remote Connections and open GS1IntegrationDemoLanguageCode
- Change language locale from **EN** to **DE/NLD/FR/ITA/ES** here:



## 10. Configure Perflon to send emails

The demo database contains two remote connections ("Notifications" and "Email") which are used to send emails. You must update both of these connections with your SMTP settings to demonstrate email capabilities.

- Visit <https://www.smtp2go.com/> and create an account (other SMTP services can be used)
- Go to Administration -> Remote Connections and open "Email" or "Notifications"
- Update the connection string with username, password and fromaddress



## 11. Update Actions with relevant receiving email addresses

The demo database has two actions that send emails. You must update receiving email in both.

- Go to Actions and find:
  - 05 Workflow -> Send email with translation alert
  - 08 Suppliers -> Send email to suppliers when new items are exposed
- In both actions, replace [RECEIVING\_EMAIL] with the email address you want to use in demo situations

Actions	Action Map - From	To	Command	Action	Script	Note
01 Import	.	dummy	SELECT.PERFION		<Query>	...
02 Data syndication	table	@FORMAT				
03 Hotfolder	dummy	tblLog	SEND.MAIL			
04 Sync	@REMOTECONNECTIONNAME=Email	@smtp				
05 Workflow	[RECEIVING_EMAIL]	@To				
Auto-categorize products		@subject			Value = "Products ready for ES translations";	
Move invalid and unsellable product		body			Value = "<h1>Products ready for ES translations</h1> Please ...	
Send email with translation alert	tblLog	C:\Perfion Data\MailLog.xlsx	WRITE.EXCEL			
06 Other actions						
07 OpenAI						

Actions	Action Map - From	To	Command	Action	Script	Note
00 Konica	.	dummy	SELECT.PERFION		<Query>	
01 Import	table	@FORMAT			<Select languages='EN' maxcount='1'>	
02 Export	dummy	tblLog	SEND.MAIL		<Feature id='Value' />	
03 Hotfolder	@REMOTECONNECTIONNAME=Email	@smtp			</Select>	
04 Sync	[RECEIVING_EMAIL]	@To			<From id='100' />	
05 Workflow		@subject			</Query>	
06 Item Creator		body			Value = "New products ready for your enrichment";	
07 AI interfaces					Value = "<h1>New products ready for your enrichment</h1> Dear supplier,  One or more new products awaits your enrichment in the <a href='\"http://supplier.local/#/dashboards/7\"'>COFFEE WORLD Supplier Portal</a>.  Please complete the enrichment within three working days.  Best regards COFFEE WORLD  ";	
08 Suppliers	tblLog	C:\Perfion Data\MailLog.xlsx	WRITE.EXCEL			
09 GS1 integration						

## 12. Create new backup of Perfion database

When above changes have been done, you want to create a new backup of the Perfion database. This will make it easy to reset demo server after a demo

- Start SQL Management Studio
- Backup database **demo\_perfion** to **C:\Perfion Data\Backup\ demo\_perfion.bak**
  - NOTE: delete existing backup file before creating the new file