Perfion Partner demo server setup

Perfion 2026-R1-SR2

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

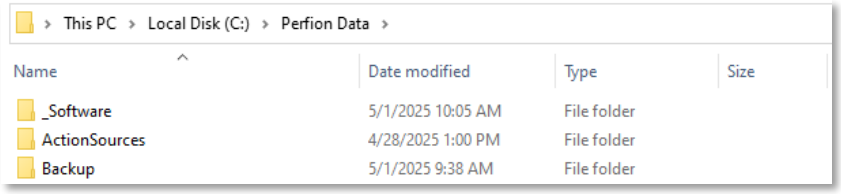
NOTE: The Perfion Partner demo setup includes BC and SAP databases but not BC and SAP applications or license files. If you restore the BC and SAP databases as instructed below, without installing BC or SAP applications, you will be able to run "ERP first" demos. If you want to run "PIM first" demos, 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.

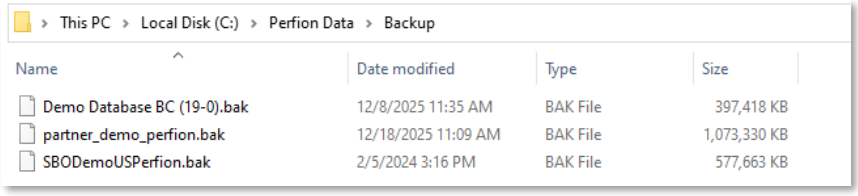
1. Unzip the provided Perfion data package

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



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*



3. Download Perfion applications

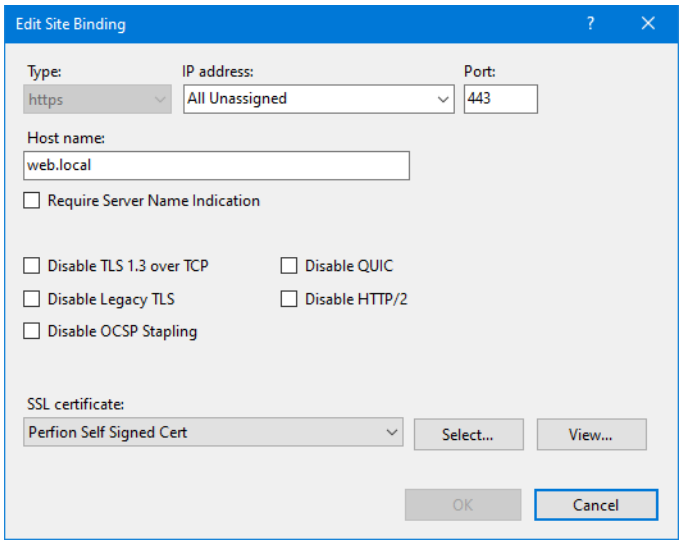
- Go to Boyum Help Center / Perfion / Software Downloads
- Download the following applications:
  - Perfion Windows Client
  - Perfion Web Client
  - Perfion Supplier Portal
  - Perfion Application Server
  - Perfion API

4. Install Perfion Windows Client

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

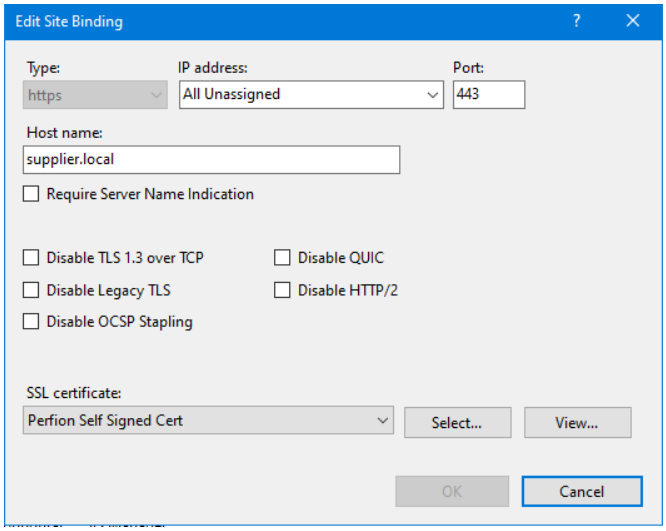
5. Install Perfion Web Client

- Install Perfion Web Client as a new site
- Installation guide can be found at Boyum Help Center / ... / 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 Boyum Help Center / ... / 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*

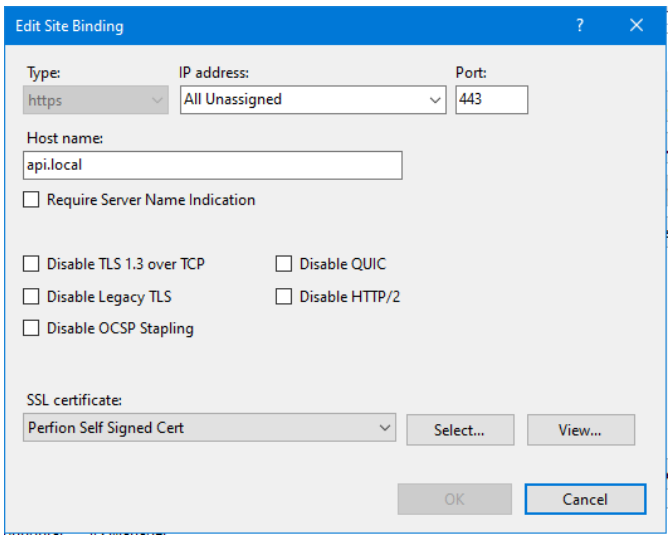


7. Install Perfion Application Server

- Install the Perfion Application Server as a service or as a console app
- Installation guide can be found at Boyum Help Center / ... / Application Server

8. Install Perfion API

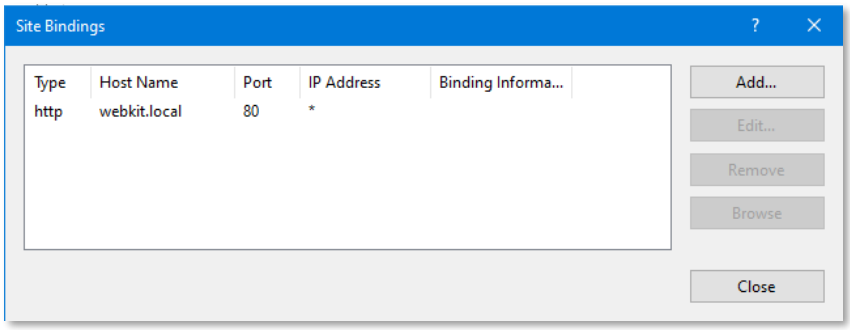
- Install Perfion API
- Installation guide can be found at Boyum Help Center / ... / API / Installation Guide
- Make sure to set up the IIS website with **HTTPS port 443** and **host name supplier.local**
    - *Certain configurations in the demo database only work when the Perfion Supplier Portal is installed with these settings*



9. Install Perfion Web Kit

The Perfion Web Kit contains a demo webstore and a DPP web application.

- Unzip C:\Perfion Data_Software\PerfionWebKit.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 WebKit is installed with these settings*

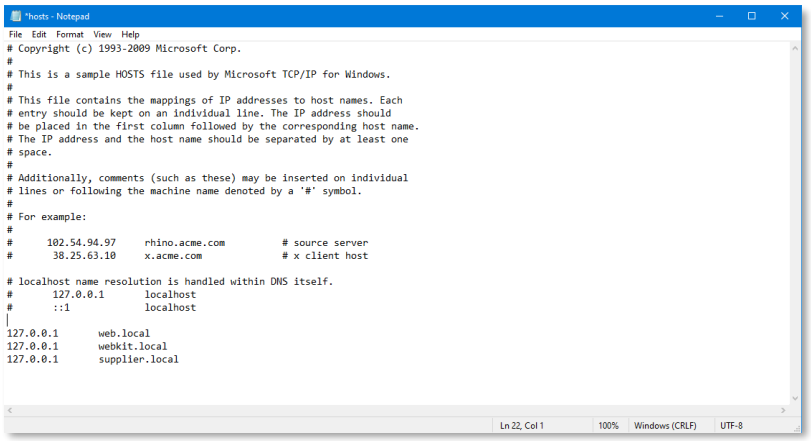


10. Install Perfion-Shopify connector

- 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

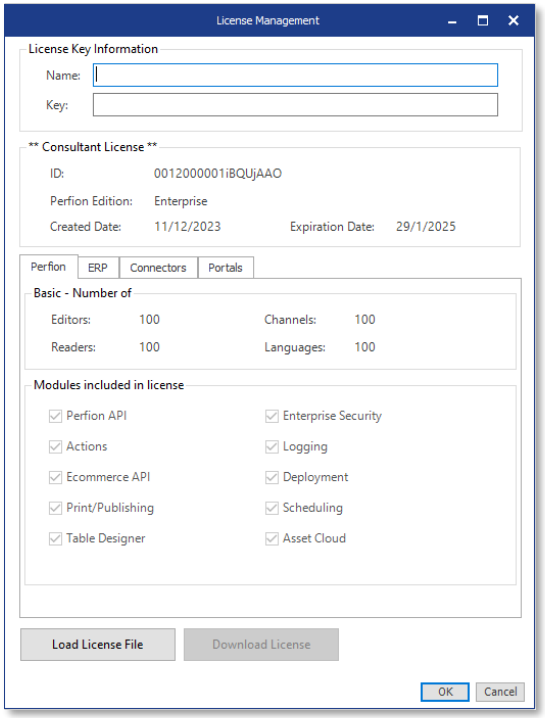


Configuration and personalization

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



2. 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.

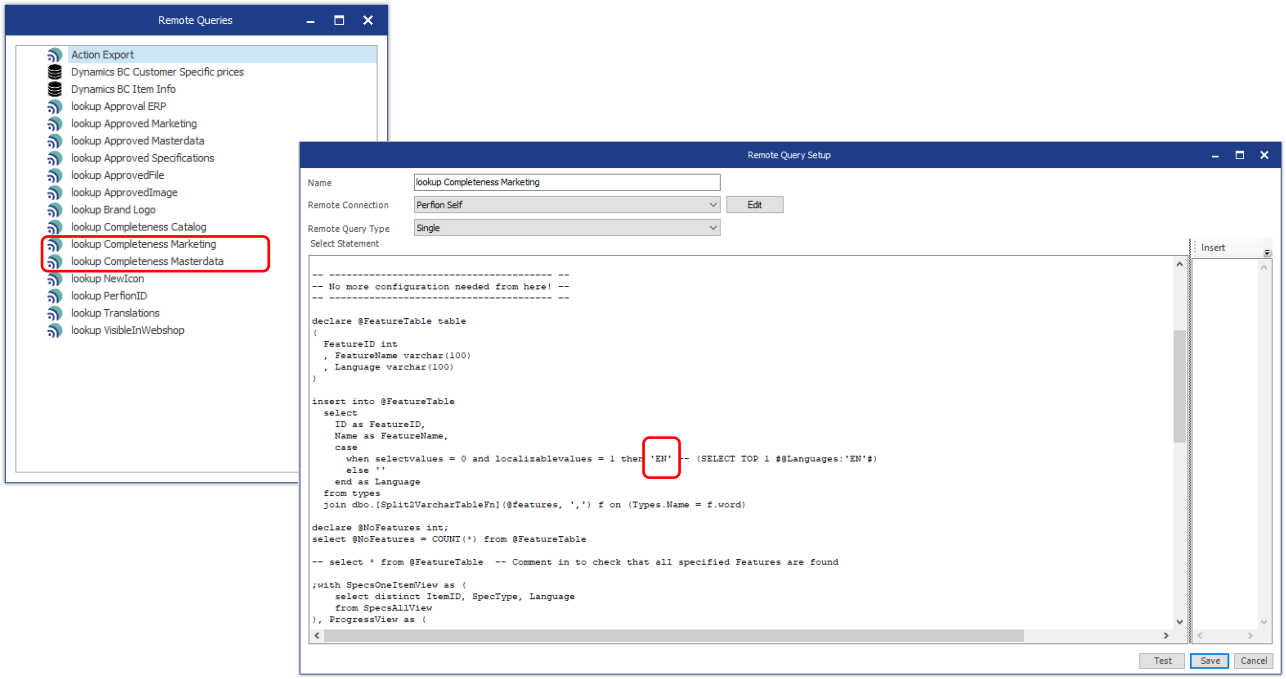
- In web client, log in with admin user and change **data language** and **interface language** to your preferred language
- Log in to supplier portal with both users below and change **data language** and **interface language** to your preferred language:
    - perfionsupplierEN1@boyum-it.com / PerfionDemo23
    - perfionsupplierEN2@boyum-it.com / PerfionDemo23

3. 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

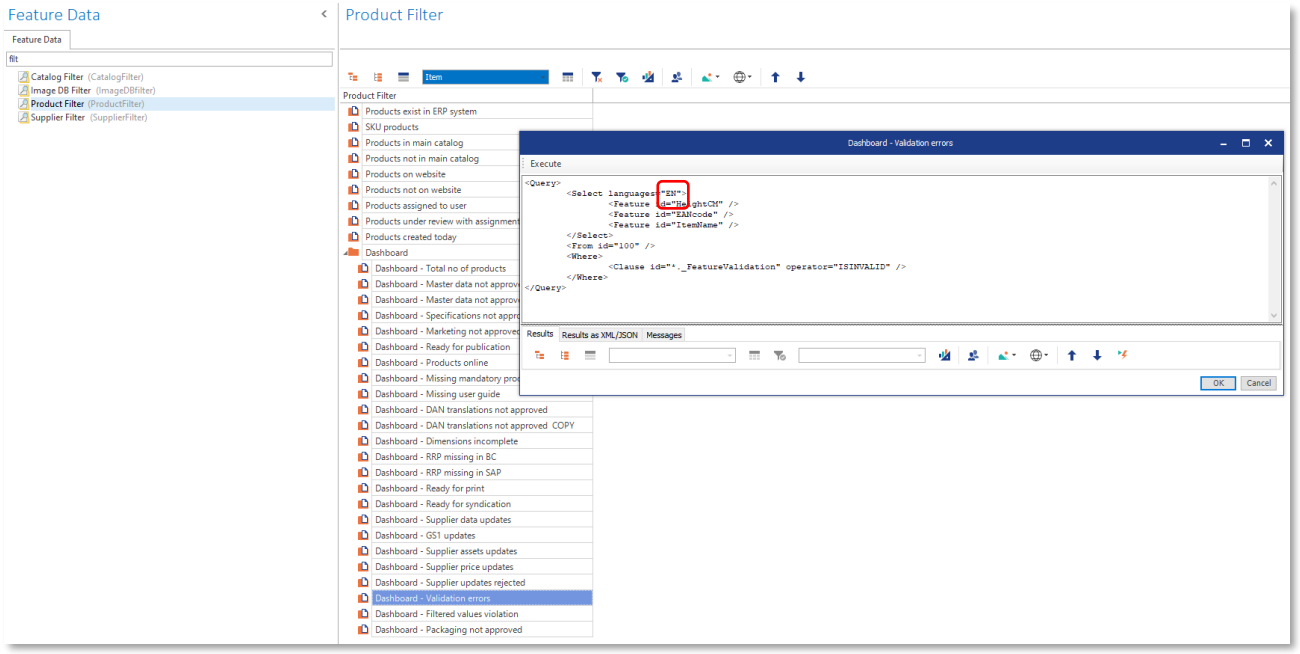
- In code, change EN to your preferred language code



4. 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.

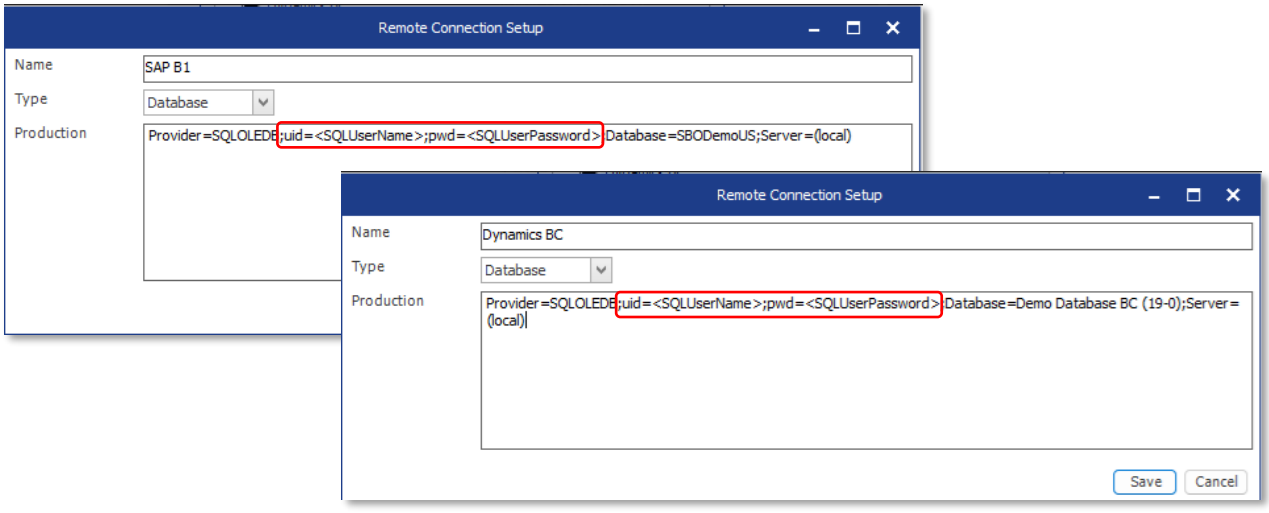
- Go to Feature Data and find **ProductFilter**
- Edit query for item **Dashboard – Validation errors**
- Change language in query from **EN** to **DE/NLD/FR/ES/ITA**



5. 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.

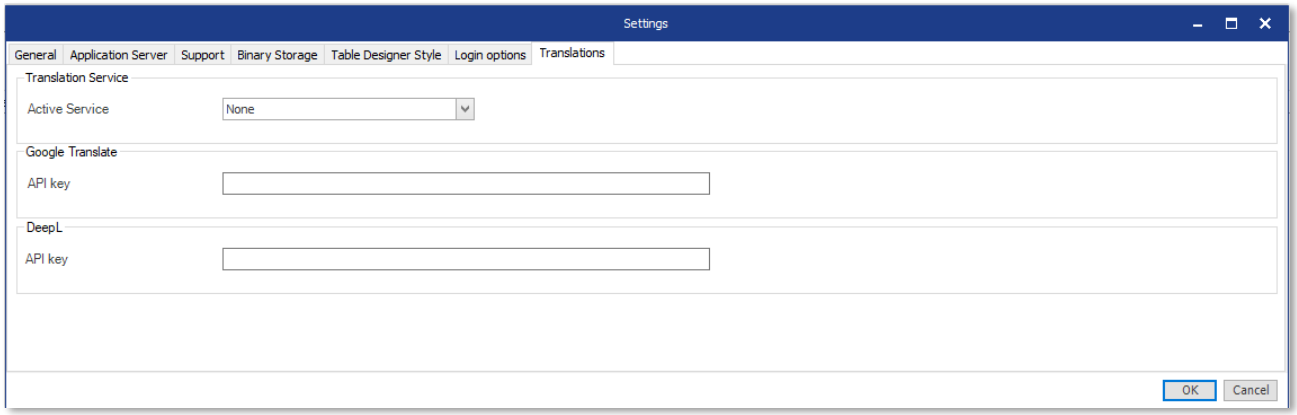
- Go to Administration -> Remote Connections
- Open "SAP B1" and "Dynamics BC" and update SQL user id and SQL password with valid credentials to your SQL server:



6. Insert DeepL translation key

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

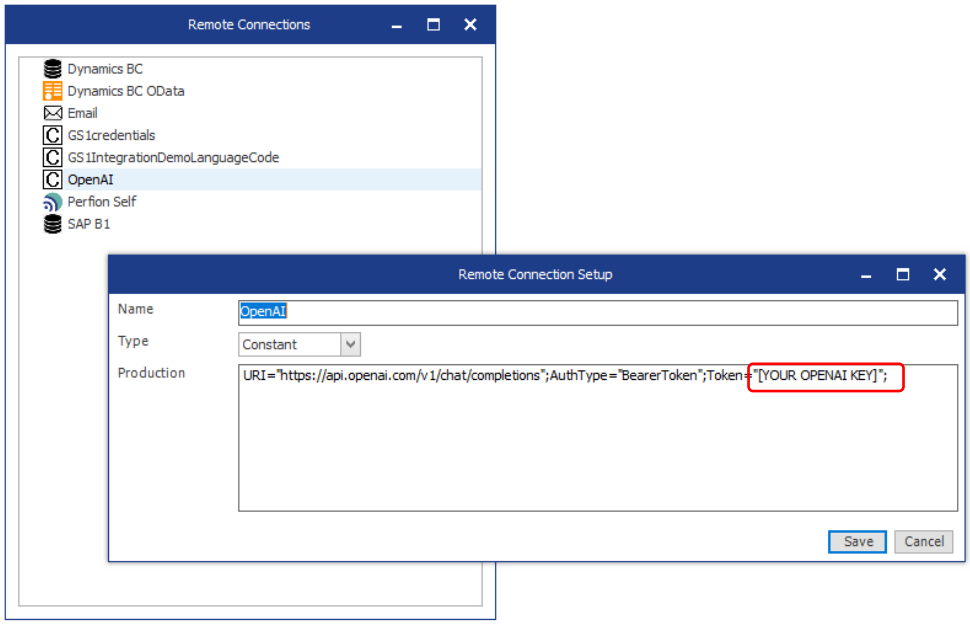
- Visit https://www.deepl.com/pro-api?cta=header-pro-api and sign up for an API key
- Go to Administration -> Settings -> Translation and load the API key



7. 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.

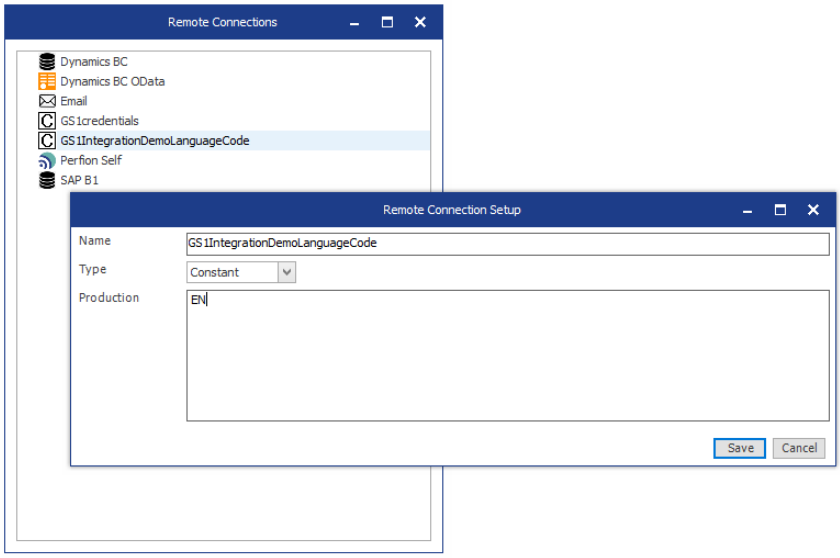
- Visit https://openai.com/ and sign up for an API key
- Go to Administration -> Remote Connections and find OpenAI
- Insert your OpenAI Key where indicated below



8. 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.

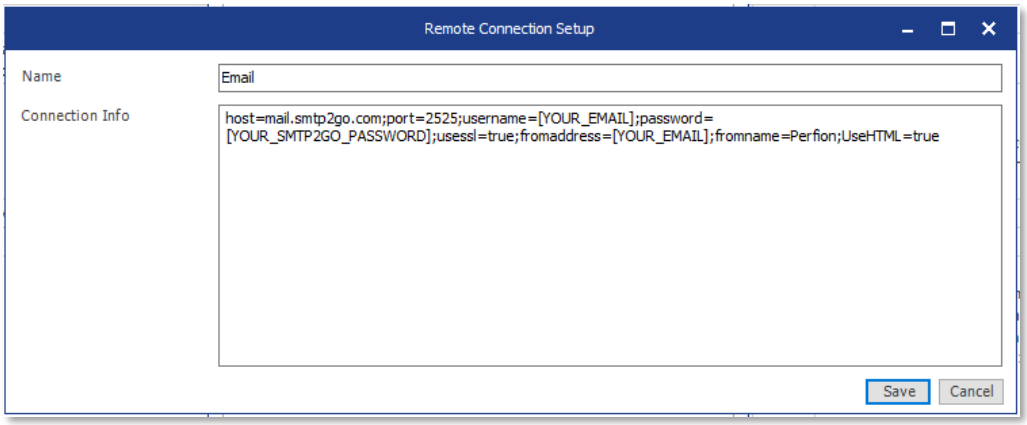
- Go to Remote Connections and open GS1IntegrationDemoLanguageCode
- Change language locale from **EN** to **DE**/**NLD**/**FR/ITA/ES** here:



9. Configure Perfion 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.

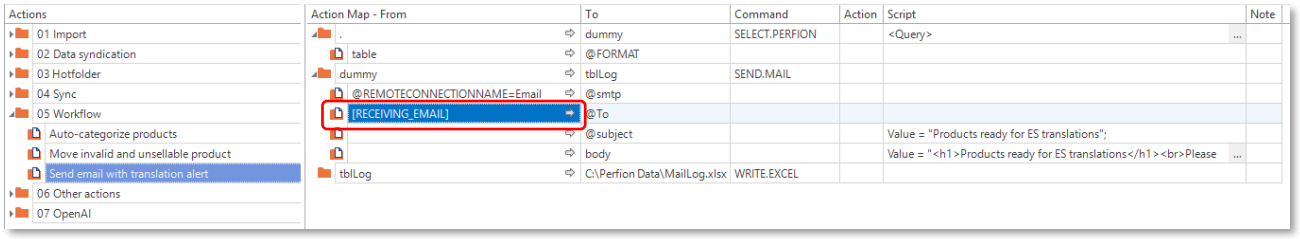
- Visit https://www.smtp2go.com/ and create an account (other SMTP services can be used)
- Go to Administration -> Remote Connections and open "Email" or "Notifications"
- Update the connection string with username, password and fromaddress

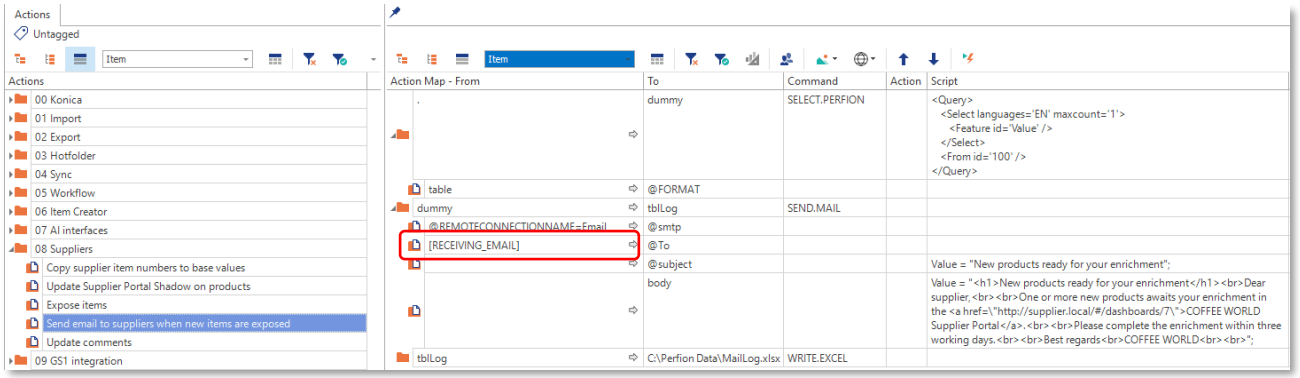


10. Update Actions with relevant receiving email addresses

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





11. 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