Next Generation Hosting Automation, Billing & Management Software

Introduction to Provisioning System

Operations Manual

- Panel Control Server
- Panel Remote Server
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Enterprise Hosting

Operations Manual

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- Orchestration Module for Web Hosting

Preface

This guide is intended for providers. It provides comprehensive illustration showing how to use Provider Control Center (PCC) and its wide array of rich features. It will help you carry out necessary installations, configurations and deployments as required. Please carefully follow this guide to get yourself acquainted with the control panel.

Note: Please note that not all of the features will necessary be available in this guide.

Document Conventions

Attribute	Convention	Example
Keyboard Keys	Capital Key name with bold	To complete this task press **ENTER** key
Navigation	Item name with bold	**File >> Open**
File name, Command and Directory structures	Textual name in Segoe UI	Logfile
Tabs and buttons on dialogue boxes	Tab name with bold, button name with bold	Select **General** tab
Important or Special note	Bold and underline (Note)	**Note:** This is an important note

Control Panel Provisioning System

Control Panel Provisioning System is **ALL-in-ONE** Complete Business Automation Solution for Windows. It includes everything a web hosting company needs to run its day-to-day business operations. It helps run a profitable, extensible and successful web hosting business using latest tools and cutting edge technology.

It caters the need of **Traditional** as well as **Enterprise Hosting** supporting wide range of features including **Billing, Management, Help Desk** automation and **Network Monitoring**. In addition to automation, it provides broad 3rd party integrations with popular platforms.

Control Panel provides **Unified end to end prime automation** for:

🌐	Shared Hosting Hostmatic, Plesk
✉	Exchange Server 2010 hosted, On-Premise, 2013, 2016, 2019
⚙	SharePoint Server WSS 3.0, 2010, 2010 Multi-tenant, 2013, Multi-tenant, 2016, 2019 & Subscription Edition
⚙	CRM Server 4.0, 2011, 2013, 2015, 2016, Dynamics 365
📞	Skype for Business Server 2010/2010 MT, 2013/2013 MT, 2015, 2019
🖥	VPS Server Windows Server 2008 R2/2012 R2, Windows Server 2016, 2019 & 2022
📝	Microsoft Cloud Solution Provider
☁	Active Directory Synchronization
📝	Work Folders Windows Server 2016
✉	Microsoft Remote Desktop Service

Control Centers

Control Panel provides four types of web based control centers to manage set of hosting services. Each level of control panel user receives varied level of control depending on the control panel type.

1. **Provider Control Center (PCC):** This is a web based control panel for the web hosting service provider. PCC allows the service provider to setup, manage, run and monitor his hosting business from single web interface and for this it provides tools and applications.
2. **Reseller Control Center (RCC):** This web based control panel provides tools and applications for the reseller user. It includes products management, billing and online store-front.
3. **Customer Control Center (CCC):** The customer control center is web based control panel that lets the customer manage his purchased services, order new service, request technical support and manage billing.
4. **4th level Interface:** Any active directory user created in control panel will get details about accessing the interface to login and change the password via email when their account is created.

Panel Control Server

Panel Control Server is the central provisioning system that is responsible to integrate, facilitate **ALL** hosting services (Traditional and Enterprise) and offers unified management of the said services.

It communicates with the remote servers to automatically provision the services. Panel Control Server is the complete answer to **integrated, efficient** and **robust unified** hosted services management.

Panel Remote Server

Remote Server consists of Control Panel Provisioning Service which is responsible to actually provision Hosted services. (Shared Hosting, MS Exchange Service, MS SharePoint, MS CRM, MS CSP, MS Hyper-V, Windows Work Folders, RDS etc.).

Control Panel extends its functionality through Orchestration Module e.g. (Orchestration Module for MS Exchange, Orchestration Module for MS SharePoint, Orchestration Module for MS CRM, Orchestration Module for MS Skype for Business, Orchestration Module for Hyper-V, Orchestration Module for Directory Synchronization, Orchestration Module for MS CSP, Orchestration Module for Windows Work Folders & Orchestration Module for Remote Desktop Services).

Remote servers running Enterprise Software are provisioned using Control Panel Provisioning Service.

Services

Control Panel relies on different services running on the back end to carry out its operations. All services mentioned below must be running to carry out the related operations. You can check service status and start/stop them from the server where control panel is installed under the Windows Services Manager.

Below is brief description of control panel services running on back end and the functions each service has.

1. **Help Desk Service:** Manages Ticketing System and exhibit notifications as configured.
2. **Provisioning Service:** Extends its functionality through Orchestration Modules for Enterprise Hosting e.g. (Hosted Exchange, SharePoint, Skype4B, CRM & Hyper-V etc.) and Traditional Hosting. Remote servers running Enterprise Software are provisioned using Provisioning Service.
3. **Network Service:** This is responsible for network monitoring and management.
4. **Billing Service:** Payments/Documents/Invoices and terminations/emails/notifications are handled through Billing Service.
5. **License Service:** It communicates with the Licensing Server to activate/upgrade the licenses and is used for License Management. This service should run all the time.
6. **O365 Service:** It activates CSP Module and to communicate with Microsoft Office 365 a windows service is built that operates as a bridge between Control Panel and Microsoft Office 365. To install the service please locate "**o365install.bat**" file inside "***Control Server Installation directory > Apps > O365***".

Advantages

Everything in One Software

Control Panel is a complete business life-cycle management system. It includes everything a web hosting company needs to run its day-to-day business operations. It helps run a profitable, extensible and successful web hosting business using latest tools and cutting edge technology.

Services you can deploy and manage with Control Panel

Traditional Hosting	Enterprise Hosting	Other Services
Domain name registration	Hosted Exchange	SSL Accounts
Shared web Hosting (Hostmatic, Plesk)	Hosted SharePoint	Active Directory Synchronization
Dedicated server hosting	Hosted CRM	Miscellaneous
Database Hosting	Hosted Skype for Business	Mime Cast
DNS Manager	Hosted VPS	
Data Centers	Microsoft Cloud Solution Provider (CSP)	
	Work Folders Hosting	
	Microsoft RDS	

Complete Automation & Management

Powerful domain management tools	Self provisioning tools	IP Address allocation and management
Customer Management	Email Templates	Integrated HelpDesk
Reseller Management	Automated Maintenance	Much More...

Integrated billing system

Configurable Billing System	Customizable Invoices	Upgrade/Downgrade Billing

Billing Reports	Credit Card Management	Taxation and Tax Exemption
Anti Fraud Filters and Plug-ins	Refunds, Reversals, Credit Support	WHMCS Billing
SEPA Payment	CSP Billing	

Easy customization and integrations

Customizable Control Panel Logo	Customizable store front
Notifications can be customized	Easy color customization
Layout Settings i.e. Theme & Menu settings	Built-in Modules Configuration
Microsoft CSP Profiles	Two Factor Authentication
Alerts Configuration	Resellers Configuration

Multilingual, localization support

Completely localized	Supports various languages
Bill in your local currency	Control Panel API support
Terms & Conditions	

View Dashboard

To view dashboard navigate to the following path:
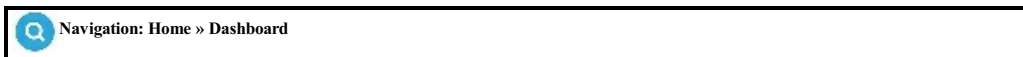
You can view following on dashboard:

1. Provider can edit profile and change password anytime. Place the cursor on **top** right corner which shows provider name is logged in as provider. You can view following options
    i. Profile
    ii. Two Factor Authentication
    iii. Change Password
    iv. Log Off
2. Provider can change **Skin color** by clicking on brush icon on **top** right corner.
3. Provider can **Search** Customers, Company, Subscription, User email by clicking on search icon on **top** right corner.
4. Provider can **Search** navigation to a particular page from Left pane.
5. Provider can select following:
    i. Select **Language**
    ii. Select **Locale**
6. Provider can also view total number of Customers, Subscriptions, Invoices, Payments, Open Tickets and view Quota and Usage Reports.

Update Profile & 2FA

You can edit your provider profile settings and change your password etc. by clicking on top right corner of the control panel web page.

Following can be be managed:

1. Profile
2. Two Factor Authentication
3. Change Password
4. Log Off

Profile

To manage profile click **profile** where you can change following:

1. **Passport Login (E-mail):** This cannot be changed.
2. **First Name:** You can change first name
3. **Last Name:** You can change last name.
4. **Designation:** You can change destination.
5. **Address:** You can change address.
6. **City:** You can change city.
7. **State/Province:** You can change province
8. **Zip/Postal code:** You can change zip code.
9. **Country:** You can change country.
10. **Phone:** You can change phone number.
11. **Mobile:** You can change mobile number
12. **Signature:** You can change signature.

Click **Save** when done.

Two Factor authentication

To enable/disable 2FA click **Two Factor Authentication.**

Click **Enabled** and select one of following:

1. **PIN through Email:** Select radio button & provide Email address.
2. **Authenticator App:** Select radio button. Re-Login will be required to configure if needed.

Click **Save** when done.

Change Password

1. **Old Password:** Provide old password.
2. **New Password:** Provide new password.
3. **Confirm New Password:** Confirm password.

Click **Save** when done.

Log Off

To log out you can select log off option this will take you to logging page of control panel.

Customer Management Overview

There are two types of client accounts:

1. **Reseller account:** Reseller type client accounts can re-sell the services. There are two types of Reseller in Control Panel:
    I. PrePaid/Subscription Based reseller
    II. Commission Based reseller
2. **Customer account:** Customer account is end-user account associated with the provider or reseller account. The client account user can login to Customer Control Center (CCC) to manage the products and services he purchased.

Subscriptions: Panel creates one subscription for every product/service purchased.

Customers

To view customers navigate to the following path:

Navigation: Home » Customer Manager » Customers

There are three buttons:

1. **New Customer:** New customer is created by clicking on **New Customer** button.
2. **Export to Excel:** You can also export the customer information to excel.
3. **Import Customers:** You can Import more than one customer by clicking on this button.
4. **Update Sub Reseller:** When you select Customers(s) from the listing. You will see button **Update Sub Reseller**. See more detail on Sub Reseller.

Existing customer can be searched with the following fields:

1. **ID:** ID is the unique ID of the customer.
2. **Name:** Name field is the name of the customer.
3. **Owner:** Owner may be provider or reseller.
4. **Email:** It is the email address. For Example: *John@example.com*.
5. **Domain Name:** It is the domain name. For example: *www.google.com*.
6. **Status:** Status could be selected from the drop down list e.g. all, active, on-hold, fraud or deleted.

Customers List Tab

The following fields are displayed in the **Customers List** tab:

1. **ID:** This is the customer's unique id.
2. **Name:** This is the name of the customer.
3. **Company Name:** This is the company name.
4. **Owner:** Owner may be provider or reseller.
5. **Country:** Country of the customer.
6. **Options:** In the options column a customer can subscribe a service by clicking on the **Subscribe Service**.

Note: A customer can be deleted by clicking on the **Delete** link and a customer can be suspended by clicking on the **Suspend** link.

Access Template Tab

In the **Access Template** tab new template can be added by clicking on the **Add Template** button.

Access Template:

An Access Template comprises of set of rules which would Allow/Disallow certain features to a customer. A Default Client Template is already defined. A template can be edited by clicking on **Edit** link and a template can be deleted by clicking on the **Delete** link.

Contacts Tab

This tab will show all the contacts that exists under customers.

Creating a Customer

A customer account can be created in two ways.

1. **Using Off-line Order Form:** Off-line form is a convenient way for provider to add new customer account or to add subscriptions to existing client accounts.
2. **Using Online Store:** Online store (order form) is configured in Control Panel and deployed on your website. See setting up order forms.

To create a client using offline method, navigate to the following path:

> **Navigation: Home » Customer Manager » Offline Order**

or simply navigate to the following path:

> **Navigation: Home » Customer Manager » Customers**

Click on **New Customer** button. Select customer **Ownership**. Fill in the following fields under *Customer Login Information* section:

1. **User name (e-mail address):** Provide User name or email address.
2. **Password:** Provide password. You can also generate random password.
3. **Confirm password:** Retype password.
4. **Send Setup Email:** Check box

Fill in the following fields under ***Customer Information*** section:

1. **First Name:** Provide customer first name.
2. **Last Name:** Provide customer last name.
3. **Company name:** Provide company name.
4. **Address:** Provide address.
5. **City:** Provide city name.
6. **State:** Provide state name.
7. **Zip:** Provide zip code.
8. **Country:** Provide country name.
9. **Phone:** Provide phone number.
10. **Is Taxable:** Check this box if taxation is applied.
    i. **Company TaxId / Vat Number:** Provide valid VAT number
    ii. **Tax Exemption ID:** Provide Tax exemption id.
11. **Chamber of Commerce Number:** Provide chamber of Commerce Number.
12. **Mobile:** Provide mobile number.
13. **Fax:** Provide fax number.
14. **Alternate email:**> Provide alternate email.
15. **Currency:** Select currency to be used by customer.
16. **Locale:** Select locale.
17. **Language:** Select language.
18. **Time Zone:** Select time zone.
19. **Access Template:** Select access template.
20. **Managed by Sub Reseller:** Select sub reseller under which you want to manage this customer.

And then either click on **Add Customer** or click on **Add and Subscribe Service** button.

Apply Taxation

Control Panel facilitates you to induce taxation into your business model and provides a third party **Avalara** solution for sales automation and tax compliance.

To configure and add new tax zones you have to navigate the following path:

🔍 **Navigation: Home » System Configurations » Billing Configurations » Taxation » Tax Zones**

See More details to [configure Taxation and Avalara](#).

Apply Taxation on Reseller

To apply taxation on reseller navigate to the following path:

🔍 **Navigation: Home » Customer Manager » Resellers**

Create **New Reseller.**

For existing reseller, click on the Reseller ID.

🔍 **Navigation: Home » Customer Manager » Resellers » Reseller Detail**

Select **Personal Info** tab and click **Edit Profile.**

1. **Is Taxable:** Select following to apply taxation
2. **Company TaxId / Vat Number:** Provide Tax Id/ VAT umber
3. **Tax Exemption ID:** Provide Tax exemption ID.

Apply Taxation on Customer

To view customer detail navigate to the following path:

🔍 **Navigation: Home » Customer Manager » Customers**

Create **New Customer.**

For existing customer, click on the Customer name.

🔍 **Navigation: Home » Customer Manager » Customers » Customer Detail**

Select **Personal Info** tab and click **Edit Profile.**

1. **Is Taxable:** Select following to apply taxation
2. **Company TaxId / Vat Number:** Provide Tax Id/ VAT umber
3. **Tax Exemption ID:** Provide Tax exemption ID.

Deleting a Customer

What's get deleted?

1. Subscriptions
2. Products/Services
3. Domains
4. Invoices
5. Transactions
6. Support Tickets

To delete a Customer account navigate to the following path, select the customer you wish to delete and then click on the **Delete** button under options.

Navigation: Home » Customer Manager » Customers

Note: A customer cannot be deleted unless all its subscriptions are cancelled. If there is even a single subscription active/pending cancel, account cannot be deleted. Once a customer is deleted, all subscriptions along the customer go to the service queue for processing of the termination request. You first need to delete all the related subscriptions by clicking on **RUN** in service queue and then the last step would be to click RUN for the customer to terminate it.

To permanently delete **customer settings**, navigate to following path:

Navigation: Home » System Configuration » Company Profile

Select **Personalization** tab.

For **Customer Settings:** Checkbox "Permanently delete customer/Reseller on service queue cancellation processing."

Suspend/Activate a Customer

To suspend customer(s) navigate to the following path:

Move the cursor to options column in front of customer name and click **Suspend.**

Or click on the name of customer, you will land on the following path:

Click **Suspend** to suspend the customer.

Similarly a suspended customer can be **Activated**. Provide "Reason" to Suspend/Activate.

Email Customer

To email customer navigate to the following path:

🔍 **Navigation: Home » Customer Manager » Customers**

and click on the name of customer, you will land on the following path:

🔍 **Navigation: Home » Customer Manager » Customers » Customer Detail**

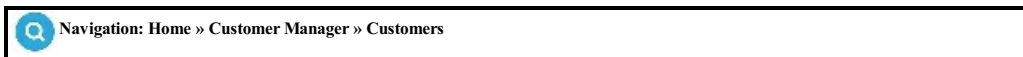Click **Email Customer** and provide following:.

Send Email

1. **From Name:** Provide from name.
2. **From Address:** Provide from email address.
3. **Send To (Email Address):** Provide send to email address.
4. **Subject:** Provide subject.
5. **Body:** Provide body of an email

Click **Send** to send email.

Import Customers

To import customers navigate to the following path:

Click on **Import Customers** button. It displays the following fields under the *Import Customers* section:

1. **Owner:** Select owner from the drop down list.
2. **Access Template:** Select the access template from the drop down list.
3. **Locale:** Select the locale from the drop down list.
4. **Browse Customer CSV File:** Brows the customer CSV file.

Click on **Import Customers** button when done. You can also download sample file Only files with (.txt) extension and less than 4 Mega Bytes in size.

Note: Customer data should in the following format. Columns are delimited by pipe and each new record begins in a new line.

CustomerNumber|FirstName|LastName|CompanyName|Address1|Address2|City|State|Country|Zip|Phone|Fax|Mobile|Email

First Name, Last Name, Email, Address1, City, Province/State, Zip, Country, Phone are mandatory fields.

Phone format is: +CCC-123456789 where CCC is country phone code.

Add Access Templates

To add new Access template navigate to the following path:

> 🔍 **Navigation: Home » Customer Manager » Customers**
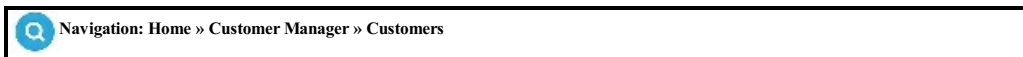
Then select **Access Template** tab.
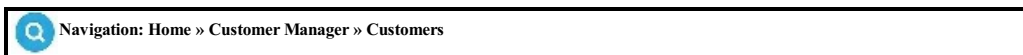
It shows the following listing:

1. **Access Template Name:** It shows the name of the access template.
2. **Options:** You can **edit** and **remove** the access template from options by clicking on the respective link

Click **Add Template** button to create a new template.

1. **Access Permissions Name:** Enter the name of Access permission.
2. Click **Plus(+)** sign to expand the required permissions for each Module
    - **(Select All / Clear All):** You can select All or clear All the options.
        i. General
        ii. Active Directory
        iii. Exchange Hosting
        iv. Dynamics CRM Hosting
        v. Skype4B Hosting
        vi. Microsoft CSP
        vii. VPS Hosting
        viii. SharePoint Hosting
        ix. Work Folders Hosting

Click **Save** and **Overwrite Sub accounts** button.

To edit **Permissions** for a specific customer navigate to the following path:

> 🔍 **Navigation: Home » Customer Manager » Customers**

Then click on the customer name.

> 🔍 **Navigation: Home » Customer Manager » Customers » Customer Detail**

Select **Permissions** tab.

1. Click **Plus(+)** sign to expand the required permissions for each Module
    - **(Select All / Clear All):** You can select All or clear All the options.
        i. General
        ii. Active Directory
        iii. Exchange Hosting
        iv. Dynamics CRM Hosting
        v. Skype4B Hosting
        vi. Microsoft CSP
        vii. VPS Hosting
        viii. SharePoint Hosting
        ix. Work Folders Hosting

Click **Save.**

Customer Product Listing

Control panel offers Traditional and enterprise services through its automation modules for **Customers/Commission Based resellers**. These hosted services are sold to customer/commission based resellers by Customer Products which are fully customizable as per customer needs.

Following services are offered by control panel:

1. Web Hosting
2. Hosted Exchange
3. Hosted SharePoint
4. Hosted CRM
5. Hosted Skype for Business
6. Virtual Machines Hosting
7. Microsoft CSP
8. Active directory synchronization
9. DigiCert SSL
10. Misc Products
11. Work Folders Hosting
12. RDS Hosting

The products for each of above service are created by powerful Service Plan Wizard.

To create a hosted service plan navigate to following path:

> **Navigation: Home » Service Plans**

Select the type of service and then select **Customer Product Listing** tab. Click **Add New Product** button.

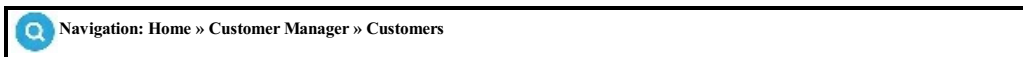**Note:** You can also edit existing products/plans by clicking on the **Edit**.

Note: For your **Commission Based resellers**, enable below option:

Enabled For Commission Reseller(s): If you check this option the Customer Product Plan will be enabled for Commission type Resellers. (Visible only if Commission Type Reseller option is enabled in Built-in Module.)

1. All Resellers
2. Select Resellers

Customer Detail

To view customer detail navigate to the following path:

> 🔍 **Navigation: Home » Customer Manager » Customers**

Then click on the Customer ID.

> 🔍 **Navigation: Home » Customer Manager » Customers » Customer Detail**

The following tabs are shown:

1. **Summary:** The operations column consists of the following buttons.
     i. **Login to Control Panel:** You can Login to the customer/reseller customer panel.
    ii. **Suspend:** You can suspend the customer.
   iii. **Subscribe Service**: Click to subscribe a service like Ex, CSP & VPS etc.
    iv. **Delete:** You can delete the customer/reseller customer.
     v. **Email Customer:** You can Email to customer/reseller customer.
    vi. **Convert to Reseller:** Click if you want to convert customer to reseller.
   vii. **Move Customer:** You can Move customer to a reseller.
2. **Personal Info:** This will show the info of the customer/reseller such as account access, primary contact, etc. You can add WHMCS User.Id if you are using WHMCS Module. See Also Add additional Login for customers
3. **Contacts:** You can add contact to the customer by clicking on the **Add Contact** button. See Also Add additional Login for Contacts
4. **Billing:** Here you can generate invoice by clicking on the **Generate invoice** link, and can also make new credit adjustments by clicking on the **New credit adjustment** button.
5. **Payment profiles:** You can add credit card to your customer/reseller account by clicking on the **Add Credit Card** button.
6. **Subscriptions:** You can view a subscriptions of the customer/reseller and subscribe more services for that customer by clicking on the **Subscribe Service** button. You can move subscription by clicking on **Move Subscriptions**.
7. **Permissions:** You can update the permissions/access templates.
8. **White Label:** You can also white label the customer.
9. **Mailing Lists:** You can specify mailing lists if Mailchimp is enabled.

Authenticate Active Directory Users

To authenticate active directory users, navigate to the following path:

Navigation: Home » System Configuration » System Users » Staff Users

Select **Active Directory** tab.

Active Directory

To enable active directory user and security groups to allow access to control panel you can configure the AD domain by providing LDAP paths:

1. **Select AD Domain:** Select active directory name.
2. **Provider staff users OU LDAP:** Provide users OU LDAP path.
3. **Provider staff security groups OU LDAP:** Provide security groups OU LDAP path.

Click **Save** button when finished.

Click **Add Staff Member** to add a new staff users or click **Edit** in front of an existing staff user. Provide Active directory user's UPN to authenticate in **Authenticate via AD Account.**

Click **Save** when done

Authenticate Customers/Contacts via AD Account

For existing **Customers**, navigate to following path:

Navigation: Home » Customer Manager » Customers

You can authenticate both customers and customers contact.

1. **Customer:** Click on customer ID and select **Personal Info** tab. Click **Edit Profile**. Select user for **Authenticate via AD account.**
2. **Contact:** Select **Contacts** tab and click **Add Contact** button. Click **Edit** to edit existing contacts and select user for **Authenticate via AD account.**

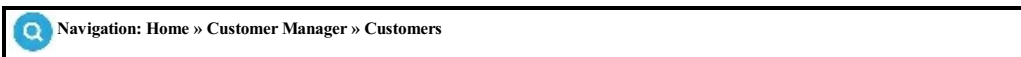### Authenticate Staff Users via AD Account

For **Staff Users**, navigate to following path:

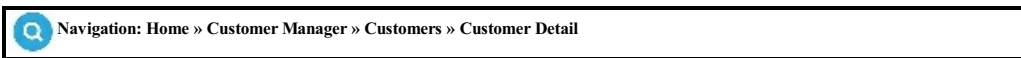**Navigation: Home » System Configuration » System Users » Staff Users**

Click **Edit** under options**.** Select user for **Authenticate via AD account.**

Move Customer

To move customer detail navigate to the following path:

Then click **Customer ID**. You will land on the following path:

Click **Move Customer**.

WARNING: Resources quota will not be verified and you have to make sure new package/Add-on selected have similar resources, server group settings so that billing and management is not affected. Please make sure services are working after move operation.

Instructions/Pre-requisites

1. Customer or subscription(s) with SSL and Domain Name Product cannot be moved.
2. Subscriptions will be moved, if new plan to map is with same server group and/or domain controller and/or country and/or locale and/or CSP profile etc. depending upon relevant product type.
3. When nested OU option is enabled, OU will not be moved in backend.
4. Voice/Plesk Subscription(s) can only be moved from one customer to another customer of same Owner.
5. Moving Customer from one owner to another owner having active Voice/Plesk Subscriptions is not supported.
6. Moving Voice/Plesk Subscription from one customer to another customer of a different owner is not supported.

In order to move customer to another reseller provide following information:

1. **Select Owner:** Select owner
2. **Please Select Access Template:** Select access template
3. **Select Payment Group:** Select payment group.
4. **Select Locale:** Select locale.
5. **Select Language:** Select language
6. **Comments:** Provide comment\reason for moving.

The existing subscriptions for customer will be shown with details below. You can switch package and cycle etc.

1. Package Type
2. Subscription Name
3. Package
4. Package Switch
5. Cycle
6. Price Freezed
7. Start Date

In case you have Mailbox template i use for the customer subscription you also need to select new templates.

1. **Old Template:** It shows old template
2. **New Template:** Select new templates from the drop down list.

Click **Save** when done.

Enable Azure Login

Control Panel provides additional login for Staff, Customers and Customer Contacts. Additional login will hold multiple 3rd party logins, like Azure username, Google user name, etc. Staff user, Customer and Customer's Contact should be able to set additional login under **Profile**.

There are two steps involved:

Step-1: Enable 3rd Party authentication. Navigate to the following path:

Navigation: Home » System Configuration » Authentication

Step-2: Provide/Add Additional Login

For **Customers**, navigate to following path:

Navigation: Home » Customer Manager » Customers

Click on the name of customer and Select **Personal Info** tab. Click **Edit Profile**. Provide following in Additional Login.

    a. **Login:** Provide Login email address.
    b. Click **Add**.

For **Customer Contacts**, Login to Customer Panel navigate to following path:

Navigation: Home » Contact Information
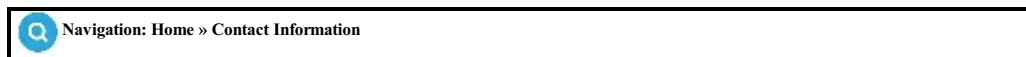
and Select **Contact** tab. Click **Edit** and provide additional login details:

    a. **Login:** Provide Login email address.
    b. Click **Add**.

For **Resellers**, navigate to following path:

Navigation: Home » Customer Manager » Resellers

Click on the name of reseller and Select **Personal Info** tab. Click **Edit Profile**. Provide following in Additional Login.

    a. **Login:** Provide Login email address.
    b. Click **Add**.

For **Staff Users**, navigate to following path:

Navigation: Home » System Configuration » System Users » Staff Users

Click **Edit** and provide additional login details:

    a. **Login:** Provide Login email address.
    b. Click **Add**.

Now "**Login with Microsoft Azure**" will appear on Login screen of control panel.

On Login with Azure, perform steps to login using Azure account. Once user is authenticated at Microsoft, find related user in panel and log-in that user. If user not found, it will give error: "Panel account for Microsoft login xyz@domain.com, does not exist, please contact *Administrator*.

Subscribe Service

Subscribe Service for Reseller

You can subscribe service for an existing Reseller by navigating to the following path and clicking on

1. **Subscribe Service** link (Reseller as an End Customer) or
2. **Subscribe As Service** (To resell service to their End Customers) link

in front of the reseller.

> **Navigation: Home » Customer Manager » Resellers**

If you are searching for existing reseller from large list, you can specify search criteria for the existing customer. You will land on following navigation path once the customer is found:

> **Navigation: Home » Customer Manager » Resellers » Reseller Detail**

Click on **Subscriptions** tab to see following button:

1. **Subscribe Service** (Reseller as an End Customer) or
2. **Subscribe As Service** (To resell service to their End Customers)

You can use one of above (as required) to subscribe this reseller for a new service.

Note: Subscribe As Reseller is NOT available for Commission Based Resellers.

Subscribe Service for Customer

You can subscribe service for an existing customer by navigating to the following path and clicking on **Subscribe Service** link in front of the desired customer.

> **Navigation: Home » Customer Manager » Customers » Customers**

If you are searching for existing customer from large list, you can specify search criteria for the existing customer. You will land on following navigation path once the customer is found:

> **Navigation: Home » Customer Manager » Customers » Customer Detail**

Click on **Subscriptions** tab to see the **Subscribe Service** button. You can click this button to subscribe this customer for a new service.

Complete Service Provisioning:

1. On Step-1 Select **Billing** currency for e.g. USD
2. On Step-2 Select the **Service** which you want to sell to selected customer from the service. For e.g. Microsoft Exchange.
3. On Step-3 Select the **Package** you want to add-on then save it in shopping cart.
4. Provide **domain and organization name** if you are creating new organization. For existing active directory organizations you can select from dropdown list.
5. **Add/Associate Addon** as required. On review page click on Next.
6. Fill out the payment method and click on "Generate" against Transaction ID if the billing method is used from Control Panel. Select the **Payment method** from the dropdown menu against Payment method. You can write order comments and billing comments also for new subscription. Click on **Save** to save the new order. You can also choose **Payment later** option.
7. Once the order has been saved it will go to the "**Service Queue**" for execution. Click on "Run" to complete the Order.

Contacts

To view customer detail navigate to the following path:
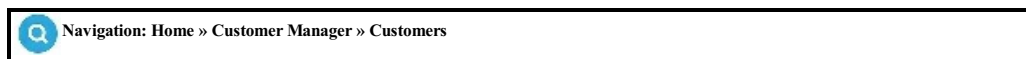
Then click on the customer name.
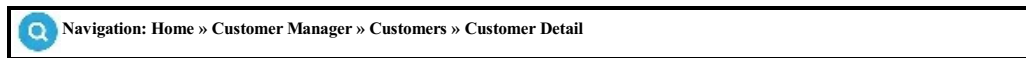
Select **Contacts** tab. You can see the following listings for contacts.

1. **Contact Name:** The shows the full name.
2. **Email Address:** It displays the email address.
3. **Phone No:** It displays the phone number.
4. **Country:** It displays the name of the country.
5. **Options:** You can **Edit** or **Delete** the contact by clicking on the respective link.

Add Contact

To add a new contact click on **Add New Contact** button and fill in the following fields:

1. **First Name:** Enter first name of the customer.
2. **Last Name:** Enter last name of the customer.
3. **Address1:** Enter Address.
4. **City:** Enter the City name
5. **State:** Enter the name of the state.
6. **Zip:** Enter zip or postal code.
7. **Country:** Enter the name of the country.
8. **Phone:** Enter the phone number.
9. **Mobile:** Enter the mobile number.
10. **Fax:** Enter the fax number.
11. **Email Address:** Enter Email address.
12. **Access Template:** Select Access Template for Contact.

Account Access

1. **Allow Access to Control Panel:** Check if you want to allow access to control panel for this Customer/Reseller.
    i. **Password:** Provide password.
    ii. **Confirm password:** Confirm password
    iii. **Authenticate via AD account:** Select AD user for authentication.
2. **2FA Enabled:** Check this option if you want to allow 2FA.

Click **Save** when done.

Issue Credit

In daily business operations there are various adjustments and alterations, these changes can be caused by any of the reason, either it could be in the favor of any discount of service interruption or explicitly on any product after sale or it could be due to change in prices etc. Thus, Control Panel allows you to make such adjustments to keep your billing/accounting up-to-date and error free.

To issue credit you have to navigate to the following path:

Navigation: **Home » Billing Manager » Issue Credit**

Select the client, to whom you wish to issue credit and provide the information in the field and click on **Save** button.

1. **Date:** Enter date.
2. **Customer:** Select customer from the drop down list.
3. **Reference number:** Provide reference number.
4. **Total:** Select currency from the drop down list.
5. **Send Email:** Check if you want to send email
6. **Comment:** Provide comments.

How to Add Credit Card

Adding credit card against a client is to smooth line the payment process for that particular client, this could be for long term deals where recurring payment are likely to occur, in such situations you may be adding credit card in your billing system at the platform of Panel.
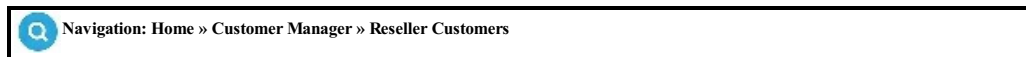
To add a credit card you have to navigate to the following path and click on the **Add Credit Card** button:

> 🔍 **Navigation: Home » Billing Manager » Online Payments » Credit Cards**

Or navigate to the following paths:

> 🔍 **Navigation: Home » Customer Manager » Customers**

and navigate to the following path for reseller:

> 🔍 **Navigation: Home » Customer Manager » Reseller Customers**

Then click on the customer/reseller customer name. Select **Payment Profiles** tab and click on **Add Credit Card** button.

Select Customer from the drop down list:

1. **Cardholder name:** Enter card holder name
2. **Type:** Select the type of the card from the drop down list.
3. **Card Number:** Enter the card number.
4. **Expiration month:** Select expiration month from the drop down list
5. **Expiration year:** Select the expiration year from the drop down list.
6. **CVV2 or CVC2 code:** Enter CVV2 or CVC2 code.
7. **Issue number (Solo/Switch Only):** Enter issue number.
8. **Card status:** Select card status from the drop down list.
9. **Allow payment by this card:** Select Yes or No.
10. **Use this card for recurring payments:** Select Yes or No.

Fill in the following fields under *Credit Card Billing Address* section.

1. **Address1:** Enter address of the card holder.
2. **City:** Enter the name of the city.
3. **State:** Enter the name of the state
4. **Country:** Enter the name of the country.
5. **Zip code:** Enter the zip code.
6. **Phone:** Enter phone number.
7. **Mobile phone:** Enter mobile number.
8. **Fax:** Enter fax number.
9. **Email:** Enter Email address.
10. **Comments:** Enter comments.

View Subscription

You can view all the products/services purchased by the customer with click of a button.

To view services/products navigate to following path:

Navigation: Home » Customer Manager » Customer

Click on the customer name you will land on customer details page.

Navigation: Home » Customer Manager » Customers » Customer Detail

Select the **Subscriptions** tab. Here you will find all products/services related to this customer.

Move Subscription(s)

To move subscriptions that belongs to customer navigate to the following path:

Navigation: Home » Customer Manager » Customers

Then click on the Customer name.

Navigation: Home » Customer Manager » Customers » Customer Detail

Select **Subscriptions** tab.

To move subscriptions that belongs to prepaid reseller navigate to the following path:

Navigation: Home » Customer Manager » Resellers

Then click on the Reseller name.

Navigation: Home » Customer Manager » Resellers » Reseller Detail

Select **Subscriptions** tab.

Now select subscription(s) and click **Move Subscription(s)**.

WARNING: Resources quota will not be verified and you have to make sure new package/addon selected have similar resources, server group settings so that billing and management is not affected. Please make sure services are working after move operation.

1. **Select Owner:** Select Owner
2. **Select Customer:** Select Customer under which the subscription is to be moved.
3. **Comments:** Provide reason /comments.

For Package following is shown:

1. **Package Type:** It shows the package type like Exchange.
2. **Subscription Name:** It shows subscription name.
3. **Package:** It shows existing package.
4. **Package Switch:** Select new package to switch package
5. **Cycle:** Select billing cycle.
6. **Price Freezed:** Check this to freeze price.
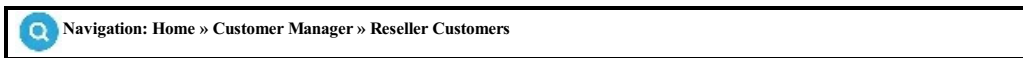7. **Start Date:** It shows start date.

Click **Save** when done.

Access Templates

To view customer Access Templates navigate to the following path:
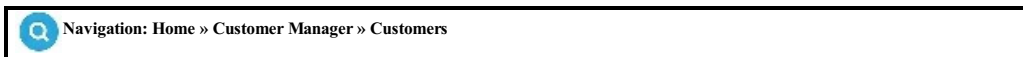
To view reseller Access Templates navigate to the following path:

Then click on the **Access Template** tab.

It shows the following listing:

1. **Access Template Name:** It shows the name of the access template.
2. **Options:** You can **edit** and **remove** the access template from options by clicking on the respective link.

Then click on **Add Template** button.

Access Permissions Name: Enter the name of Access permission.

Click **Plus(+)** sign to expand the required permissions for each Module

(Select All / Clear All): You can select All or clear All the options.

1. General
2. Active Directory
3. Exchange Hosting
4. Dynamics CRM Hosting
5. Skype4B Hosting
6. Microsoft CSP
7. VPS Hosting
8. SharePoint Hosting
9. Work Folders Hosting

Click **Save and Overwrite Sub accounts** button.

White Label

To white label customer detail navigate to the following path:

Navigation: Home » Customer Manager » Customers

Then click on the customer name:

Navigation: Home » Customers » Customer Detail

Click on **White Label** tab and provide the following details:

1. **Enabled:** Check this if you want to enable white labeling.
2. **White label URL:** Provide white label URL.
3. **Control panel brand name:** Provide control panel brand name.
4. **Company website URL:** Provide company website URL.
5. **Control panel logo:** Provide control panel logo.
6. **Copyright text:** Provide control panel logo.

Click on **Update** button when done.

To white label reseller customer, navigate to the following path:

Navigation: Home » Customer Manager » Reseller Customers

Then click on the Reseller customer name.

Navigation: Home » Reseller Customers » Reseller Detail

Click on **White Label** tab and provide the following details:

1. **Enabled:** Check this if you want to enable white labeling.
2. **White label URL:** Provide white label URL.

Mailing Lists

You can configure mailing lists via [MailChimp](#) feature in control panel. To view/add mailing lists for **customer** navigate to the following path:

> 🔍 **Navigation: Home » Customer Manager » Customers**

Then click on the Customer ID.

> 🔍 **Navigation: Home » Customer Manager » Customers » Customer Detail**

To view/add mailing lists for **reseller** navigate to the following path:

> 🔍 **Navigation: Home » Customer Manager » Resellers**

Then click on the Reseller ID.

> 🔍 **Navigation: Home » Customer Manager » Resellers » Reseller Detail**

Under **Subscribe to Mailing list** check required list and click **Save** button.

Reseller Settings

There are two types of resellers that are supported in control panel.

1. **Prepaid Resellers:** These Resellers will purchase a Service Plan or Product from you at your predefined rates that you would have fixed for your Service Plans according to your business logic and then they will create their own Service Plans at their own pricing and sell them to their own customers.
2. **Commission based Resellers:** Commission based resellers will resell the Service Plans that you have created to their own customers and will get commission on it at the rate that you would have mentioned in your service plans

To configure type of reseller in control panel, navigate to the following path:

Navigation: Home » System Configuration » Resellers Settings

Select the type of reseller you want to enable in control panel and provide below:

1. **Custom Label:** Provide custom label.
2. **Reseller Agreement Terms:** Provide Reseller Agreement term by clicking "Show Terms".

Click **Update Configurations** when done.

Reseller Customers

A Reseller customer can:

1. Subscribe/buy services as Reseller and sell services to end customers under it.
2. Subscribe/buy services as an End Customer.

To manage reseller customer navigate to the following path:

> 🔍 **Navigation: Home » Customer Manager » Customers » Reseller Customers**

There are three buttons under **Operations**:

1. **New Reseller:** New reseller is created by clicking on **New Reseller** button.
2. **Bulk Subscribe:** You can also bulk subscribe resellers.
3. **Import Resellers:** You can Import more than one reseller by clicking on this button.

You can search and filter your reseller by following:

1. **Status:** Indicates current status of the subscriptions.
   a. **Active:** Indicates a completed subscription with order paid and service provisioned.
   b. **On Hold:** Indicates that the service is currently disabled. A subscription can go into On-Hold status automatically. For example, if renewal order is not paid.
   c. **Fraud:** The subscriber have the case of fraud. It can be added to **black list**.
   d. **Deleted:** The subscription is expired and deleted. No further operations are possible on this subscription.
2. **Select Reseller Type:** Select the type of reseller. 1). Prepaid. 2). Commission Based
3. **ID:** This is the ID of reseller.
4. **Name:** This is the name of the reseller.
5. **Email:** This is the email address of the reseller. For e.g. John@example.com.

Resellers List Tab

The following fields are displayed in the **Resellers List** tab:

1. **ID:** This is the reseller's unique id.
2. **Name:** This is the name of the reseller.
3. **Company Name:** This is the company name .
4. **Customers:** This shows the total number of customers.
5. **Type:** It shows the type of the reseller such as Prepaid or Commission.
6. **Options:** In the options column a reseller can subscribe a service by clicking on the following:
   i. Login to Reseller
   ii. Subscribe as a reseller (If he wants to sell hosting services).
   iii. Subscribe Service (if he wants to be an End customer).
   iv. **Suspend:** Upon suspension, the reseller will not be able to login to the control panel anymore.
   v. **Delete:** Upon deletion, all the customer and their subscriptions inside of the reseller will be terminated.

Note: A reseller can be deleted by clicking on the **Delete** link and a reseller can be suspended by clicking on the **Suspend** link.

Before proceeding to delete a reseller customer, it is required to login to the reseller customer itself and terminate all customers and their subscriptions.

Once all customers and subscriptions inside a reseller have been deleted, the reseller can then be deleted by clicking on the **Delete** link.

### Access Template Tab

In the **Access Template** tab new template can be added by clicking on the **Add Template** button.

An Access Template comprises of set of rules which would Allow/Disallow certain features to a reseller. A Default client Template is already defined. A template can be edited by clicking on **Edit** link and a template can be deleted by clicking on the **Delete** link.

Creating a Reseller Customer

To create a reseller customer navigate to the following path and click on **New Reseller** button:
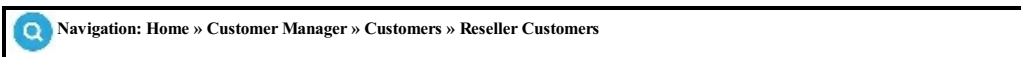
Or navigate to the path and select reseller customer from the drop down list:

Select the type of Reseller. There are two types of resellers supported in control panel.

1. **Prepaid Reseller:** It is the prepaid based reseller.
2. **Commission Reseller:** It is a commission based reseller.

Fill in the following fields under *Reseller Login Information* section:

1. **User name (e-mail address):** Provide Username or email address.
2. **Password:** Provide password. You can also generate random password.
3. **Confirm password:** Retype password.
4. **Send Setup Email:** Check box

Fill in the following fields under *Customer Information* section:

1. **First Name:** Provide reseller first name.
2. **Last Name:** Provide reseller last name.
3. **Company name:** Provide company name.
4. **Address:** Provide address.
5. **City:** Provide city name.
6. **State:** Provide state name.
7. **Zip:** Provide zip code.
8. **Country:** Provide country name.
9. **Phone:** Provide phone number.
10. **Is Taxable:** Check this box if taxation is applied.
    i. **Company TaxId / Vat Number:** Provide valid VAT number
    ii. **Tax Exemption ID:** Provide Tax exemption id.
11. **Chamber of Commerce Number:** Provide chamber of Commerce Number.
12. **Mobile:** Provide mobile number.
13. **Fax:** Provide fax number.
14. **Alternate email:** Provide alternate email.
15. **Currency:** Select currency to be used by customer.
16. **Locale:** Select locale.
17. **Language:** Select language.
18. **Time Zone:** Select time zone.
19. **Access Template:** Select access template.

Fill in the following fields under *Company Profile* section:

1. **Web URL:** Provide web URL.
2. **Address1:** Provide address.
3. **City:** Provide city.
4. **State:** Provide state.
5. **Zip:** Provide zip code.
6. **Country:** Provide country name.
7. **Phone:** Provide phone number.
8. **Fax:** Provide fax number.
9. **Billing phone:** Provide billing phone number.
10. **Sales phone:** Provide sales phone number.
11. **Support phone:** Provide support phone number.
12. **Billing Email:** Provide billing email.

13. **Sales Email:** Provide sales email.
14. **Support Email:** Provide support email.
15. **Billing Signature:** Provide billing signature.
16. **Sales Signature:** Provide sales signature.
17. **Support Signature:** Provide support signature.
18. **Clone Provider's Email Templates in Reseller:** Check box.

White label URL: Provide white label URL for the Reseller to access the control panel.

In case of Prepaid reseller, either click on **Add reseller** button or click on **Add and Subscribe Service** button.

In case of Commission based reseller, Select the **Services** which you are offering to your Commission based Reseller customer and click on **Add reseller** button.

Note: Reseller customers cannot be created using the Store Configuration/order form. This means that you cannot automate creation of reseller customer accounts using online store for web site visitors.

Bulk subscribe Reseller

To bulk subscribe reseller navigate to the following path:

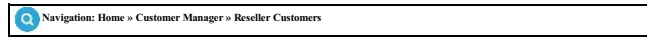Now click **Bulk Subscribe** button under **Operations** and provide following:

1. **Select Reseller:** Select resellers from Selectable to Selected
2. **Select Payment Group:** Select payment group/currency.
3. **Select Product Type:** Select type of product.
4. **Select Billing Cycle:** Select billing cycle.
5. **Reseller Package:** Select resellers package.
6. **Select Add-on:** Select Addons.
7. **Customer Package:** Select package for customers from Selectable to Selected

Note: A copy of selected customer plan(s) and associated Add-on(s) will be created under reseller.

Click **Subscribe and Create Plans** when done.

Import Resellers

To import resellers navigate to the following path:

Click on **Import Resellers** button. Provide following fields under the *Import Resellers* section:

1. **Reseller Type:** Select type of the reseller from drop down list.
2. **Access Template:** Select access template
3. **Locale:** Select locale.
4. **Language:** Select language.
5. **Time zone:** Select time zone.
6. **Clone Provider's Email Templates in Reseller:** Check box
7. **Select file:** You need to select file. See note below.

Click on **Import Resellers** button when done. You can also download sample file Only files with (.txt) extension and less than 4 Mega Bytes in size.

Note:

1. Reseller data should be in the following format. Columns shall be delimited by pipe and each new record shall begin in a new line.
2. CustomerNumber|FirstName|LastName|PrimaryEmail|SecondaryEmail|PassportLogin|PassportPassword|Country|StateOrProvince|City|ZipOrPostalCode|Phone|Fax|PrimaryAddress|SecondaryAc
3. Mandatory fields for reseller import are:FirstName, LastName, PrimaryEmail, PassportLogin, PassportPassword, Country, StateOrProvince, City, ZipOrPostalCode, Phone, PrimaryAddress, CompanyAddress1, CompanyCountry, CompanyStateOrProvince, CompanyCity, CompanyZipOrPostalCode, CompanyPhone, BillingPhone, SalesPhone, SupportPhone, BillingEmail, SalesEmail, SupportEmail, BillingSignature, SalesSignature, SupportSignature, WebUrl, DefaultCurrency, VATNumber
4. For country, set two character country code e.g. 'US' or country name e.g. 'United States'.
5. For country state, set two character state code e.g. 'CA' or state name e.g. 'California'.
6. If country has states, then valid state code or name shall be provided.
7. If Country, State, ZipOrPostalCode and Addresse(s) of the account and company are same then only provide details for account, system will automatically set those in company fields.
8. Phone format is: +CCC-123456789 where CCC is country phone code.
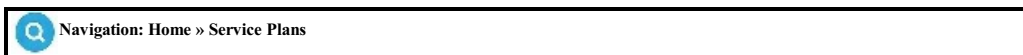
Reseller Products

Control panel offers Traditional and enterprise services through its automation modules for **PrePaid Resellers**. These hosted services are sold to prepaid resellers by Reseller Products which are fully customize-able as per reseller needs.

Following services are offered by control panel:

1. Web Hosting
2. Hosted Exchange
3. Hosted SharePoint
4. Hosted CRM
5. Hosted Skype for Business
6. Virtual Machines Hosting
7. Microsoft CSP
8. Active directory synchronization
9. DegiCert SSL
10. Misc Products
11. Work Folders Hosting
12. RDS Hosting

The Products for each of above service are created by powerful Service Plan Wizard.

To create a hosted service plan navigate to following path:
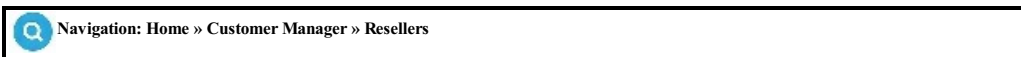
> 🔍 **Navigation: Home » Service Plans**

Select the type of service and then select **Reseller Product Listing** tab. Click **Add New Product** button.

Note: You can also edit existing products/plans by clicking on the **Edit** link.

Reseller Detail

To view reseller detail navigate to the following path:

Then click on the Reseller ID.

The following tabs are shown:

1. **Summary:** The operations column consists of the following buttons.
    a. **Login to Control Panel:** You can Login to the customer/reseller customer panel.
    b. **Suspend:** You can suspend the reseller customer. All Customers of reseller will also suspended.
    c. **Subscribe Service**: Click to subscribe a service like Ex, CSP & VPS etc.
    d. **Subscribe As Reseller:** Click Subscribe As Reseller if you want your reseller to resell their services.
    e. **Delete:** You can delete the customer/reseller customer.
    f. **Email Customer:** You can Email to customer/reseller customer.
2. **Personal Info:** This will show the info of the reseller such as account access, primary contact, etc. You can add WHMCS User.Id if you are using WHMCS Module. See Also Add additional Login
3. **Billing:** Here you can generate invoice by clicking on the **Generate invoice** link, and can also make new credit adjustments by clicking on the **New credit adjustment** button.
4. **Payment profiles:** You can add credit card to your reseller account by clicking on the **Add Credit Card** button.
5. **Subscriptions:** You can view a subscriptions of the reseller and subscribe more services for that reseller by clicking on the **Subscribe Service** button. You have to **Subscribe As Reseller** in order to resell services. To move subscription click Move Subscriptions.
6. **Permissions:** You can update the permissions.
7. **White Label:** You can also white label the reseller.
8. **Mailing Lists:** You can specify mailing lists if Mailchimp is enabled

Reseller Commission Summary

To view Commissioned reseller summary, navigate to the following path:

It shows the following listings:

1. **ID:** It shows the ID of the Reseller customer.
2. **Name:** It shows the name of the reseller.
3. **Company name:** It shows the name of the company.
4. **Country:** It shows the name of the country.
5. **Total Sales:** It shows the total sale of the reseller
6. **Total Income:** It shows the total income of the reseller.
7. **Amount paid:** It shows the total amount paid by the reseller.
8. **Balance:** It shows the total balance of the reseller.
9. **Options:** Click on New Commission Transaction to view the transaction.

New Commission Transaction

To view new commission transaction, navigate to the following path:

It shows Reseller commission summary listings as follows:

1. **ID:** It displays the ID of the reseller.
2. **Name:** It displays the name of the reseller.
3. **Company name:** It displays the company name.
4. **Primary email:** It displays the email address of the reseller.
5. **Phone:** It displays the phone number of the reseller.
6. **Payment Groups:** It displays the currency.
7. **Income:** It displays the total income of the reseller.
8. **Bonus:** It displays the bonus/commission of the reseller.
9. **Deduction:** It displays the deduction.
10. **Total Income:** It displays the total income of the reseller.
11. **Amount paid:** It displays the amount paid by the reseller.
12. **Balance:** It displays the balance

For a **New commission transaction**, please provide the following information:

1. **Reseller:** Select reseller from the drop down list.
2. **Select Transaction:** Select transaction type i.e. Payment , Bonus, or Deduction
3. **Payment Group:** Select payment group from the drop down list.
4. **Amount:** Provide total amount.
5. **Date:** Provide date
6. **Reference Id:** Provide reference ID.
7. **Comments:** Provide comments.

Click **Save** button when done.

Understanding Subscriptions

Control Panel creates a subscription for each service ordered. A customer may have one or many subscriptions depending on services ordered.

Subscription Types

Following subscription types are supported:

1. Domain subscription
2. Shared Hosting subscriptions
3. Dedicated server subscription
4. Microsoft hosted Exchange subscription
5. Microsoft hosted SharePoint subscription
6. Microsoft Dynamic CRM subscription
7. Microsoft Skype for Business/Lync subscription
8. VPS (Hyper-V) subscription
9. Microsoft Cloud Solution Provider (CSP) subscription
10. Work Folders Hosting subscription
11. RDS Hosting subscription
12. SSL certificate subscription
13. Miscellaneous subscription

Subscriptions List

Navigate through the following path:

Subscribed customer can be searched by filling the following fields:

1. **Subsc.ID:** Subsc.ID is the subscribed id For e.g. 9
2. **Customer ID:** Customer ID is the customer identification.
3. **Customer Name**: This field is for the customer's name.
4. **Domain Name:** Domain name can be as For example: *contoso.com*
5. **Package:** You can also search by Package/Product plan.
6. **Notes:** Search by Notes
7. **Company Name:** You can search subscriptions by company name.
8. **Service Type:** Select service type.from dropdown list. It can be Domain names, Shared Hosting, Misc.Products, Dedicated Servers, SSL Products, Dynamic CRM Hosting, Microsoft Exchange and All.
9. **Status:** Status can be selected from the drop down list e.g. all, active, on-hold, fraud, pending, graced or expired.
10. **Select trial:** Search by selecting status from dropdown list
11. **Label:** Search by label.
12. **Show Deleted:** Checkbox

You can select subscription(s) and **Suspend/Resume** by clicking on respective buttons. The list of subscriptions displays the following:

1. **Status:** Indicates current status of the subscriptions.
    i. **Active** - Indicates a completed subscription with order paid and service provisioned.
    ii. **Deleted** - The subscription was expired and later deleted. No further operations are possible on this subscription.
    iii. **Pending** - Invoice was generated and paid but the service is not yet provisioned for certain reason. You may check status and provision an order manually by going to Service Director » Service Queue.
    iv. **On Hold** - Indicates that the service is currently disabled. A subscription can go into On-Hold status automatically. For example, if renewal order is not paid.
    v. **Graced** - Indicated an expired subscription which is given grace period before deletion.
    vi. **Expired** - The subscription has been expired.
    vii. **Pending resume:** You may check status and run manually by going to Service Director » Service Queue.
    viii. **Pending suspend:** You may check status and run manually by going to Service Director » Service Queue.
    ix. **Pending cancel:** You may check status and run manually by going to Service Director » Service Queue.
    x. **Pending Edit:** You may check status and run manually by going to Service Director » Service Queue.
2. **Subscription:** It display following for each subscription.
    i. **Name:** This is the subscription name.
    ii. **ID:** This is unique ID assigned to the subscriptions.
    iii. **Package Type:** This indicates the type of service this subscription is created for.
    iv. **Package:** This is the package.
3. **Customer:** This is the customer name with ID for whom this subscription is created.
4. **Owner:** It displays the owner of the customer.
5. **Addons:** It displays number of addon this subscription have.
6. **Start Date:** It displays the date when subscription is created.

Subscription Detail

You can view all the details of products/services by navigating to the following path and clicking on the subscription name you wish to check details of.

Once you click the subscription name, you will be on following navigation path:

You will be able to view details of the subscription you have clicked and will be able to perform various operations on subscription. You will see following details on the Subscription Detail page.

General Info tab shows below mentioned sections:

1. **Operations:** You can perform operations like Put on Hold, Manage, Generate Renewal Invoice, Cancel Subscription, Upgrade & Downgrade and Fix Security Permissions.
2. **General:** Shows general information about the subscription.
3. **Service Summary:** Shows the service summary of the subscription i.e. status and the provider type.
4. **Account Notes:** These are notes/service messages by Control Panel or any notes added by the service provider for tagging

Resources tab shows below mentioned sections:

1. **Operations:** You can perform operations like **Edit Resources**.
2. **Limits:** It shows the following listings:
   i. Resource name
   ii. Allocation
   iii. Net Allocation
   iv. Utilized
   v. Remaining

Add-ons tab shows the record for the total no of add-ons created on the subscription. You can also buy new add by clicking on Buy Add-on button. Addon enhances the capability of already created base plan through increase of features. Under **Add-ons** tab you can click on **Add-on Resource** button to enhance the capability.

Billing tab shows the listing for the following:

1. **Doc. Num:** It shows the number of the document.
2. **Document Type:** It shows the type of the document.
3. **Total Balance:** It displays the balance in specified currency.
4. **Date:** It displays the date.

General Info, Resources, Add-ons and Billing tabs are common for all subscriptions. For each type of subscription, you will see one additional tab with subscription specific Operations section and other details about the subscription.

1. For **Exchange Subscription**, you will see Exchange Organizations tab along with General Info, Resources, Add-ons and Billing tabs.
2. For **SharePoint Subscription**, you will see Organizations/Portals tab along with General Info, Resources, Add-ons and Billing tabs.
3. For **CRM Subscription**, you will see CRM Hosted Organizations tab along with General Info, Resources, Add-ons and Billing tabs.
4. For **Shared Hosting Subscription**, you will see Domains, Mail Domains and DNS Zones tabs along with General Info, Resources, Add-ons and Billing tabs.
   i. For **Database Only Subscriptions** you will see Domains tab long with General Info, Resources, Add-ons and Billing tabs.
   ii. For **Mail Only Subscriptions** you will see Email Management.
   iii. For **DNS Only Subscriptions** you will see DNS Zones tab long with General Info, Resources, Add-ons and Billing tabs.

5. For **Skype for Business/(Lync) Subscription**, you will see [Skype4B Organizations](#) tab along with General Info, Resources, Add-ons and Billing tabs.
6. For **Hyper-V Subscription**, you will see Virtual Machines and [IP Settings](#) tabs along with General Info, Resources, Add-ons and Billing tabs.
7. For **Microsoft CSP Susbcription**, you will see [Subscriptions](#) tab along with General Info, Resources, Add-ons and Billing tabs.
8. For **Windows Work Folders hosting**, you will see [Organizations,](#) [Work Folders](#) and [File Share](#) tab along with General Info, Resources, Add-ons and Billing tabs.
9. For **RDS hosting**, you will see [RDS Organizations,](#) [Policies](#) and [User Settings](#) tab along with General Info, Resources, Add-ons and Billing tabs.

Delete Subscription

When a subscription is terminated the associated service is automatically removed (depending on service type and provider API availability). The service is pushed into Service Queue for termination and you may view the termination status and manage it.

To delete a subscription, navigate to the following path:

Navigation: Home » Customer Manager » Subscriptions List
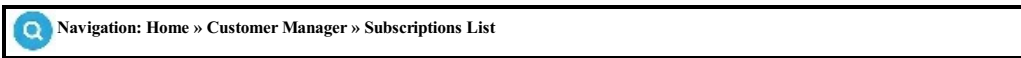
Click on the subscription name you want to delete. On next form, click on **Cancel Subscription** button. Alternatively, if you cancel the payment document associated with the subscription you can mark the subscription as terminated.

Upgrade/Downgrade Subscription

To upgrade or downgrade a hosted service you have to create a hosted service plan as required to create a hosted service plan, navigate to following path:

🔍 **Navigation: Home » Service Plans**

Select the type of service from following:

1. Web Hosting
2. Hosted Exchange
3. Hosted SharePoint
4. Hosted CRM
5. Hosted Skype for Business
6. Hyper-V Hosting
7. Microsoft CSP
8. Active directory synchronization
9. DegiCert SSL
10. Misc Products
11. Work Folders Hosting
12. RDS Hosting

Select **Reseller Product Listing** tab for resellers subscriptions and select **Customer Product Listings** tab for Customers/Commission Based Resellers subscriptions.

Click **Add New Product** button.

Note: You can also edit existing products/plans by clicking on the **Edit** link.

Under **Possible Product Upgrade / Downgrade:** Here you can configure the upgrade and downgrade behavior of this product. When a product is purchased, your client my perform upgrade/downgrade from their control center without your involvement.

Now navigate to the following path and click on the "Subscription Name":

🔍 **Navigation: Home » Customer Manager » Subscription List**

Once you click the subscription name, you will be on following navigation path:

🔍 **Navigation: Home » Customer Manager » Subscription List » Subscription Detail**

You will be able to view details of the subscription you have clicked.

Under General Info tab, click **Upgrade** or **Downgrade** button.

This action will go to **Service Queue** navigate to the following path:

🔍 **Navigation: Home » Service Director » General » Service Queue**

Click **Run** in front of Upgrade/downgrade action to complete or wait few mins, it will be processed automatically.

How to Generate Renewal Invoice

The billing cycle depends totally on your business nature and/or the subscription for any product/service offered. Hence, it is sure to generate renewal invoices by the end of the billing cycle or any other reason. Therefore, to generate renewal invoices, you have to navigate to the following path:

Navigation: Home » Customers Manager » Subscription

Select the client for whom you wish to generate renewal invoice, you can locate the client by searching with any of the credentials or by surfing page by page, clicking on the Customer ID or Customer Name; will take you to the interface, Scroll down the page and click on **Generate Renewal Invoice** button to accomplish this task.

Fix Security Permissions

To fix security permissions on a subscription, navigate to the following path:

Click on the subscription name you want to terminate. On next form, click on **Fix Security Permissions** button.

What Sync Security Group does?

1. Fix Security Permissions or Sync Security group performs following tasks:
2. Creates and sets permissions of *Org Exchange SG*, if not present already.
3. Creates RAL and ABP if not present.
4. Updates ABP of each mailbox in org.
5. For each mailbox in Org
    a. Set AL, GAL, OAB of AD User
    b. Set Calendar folder permissions for **Org Exchange SG**, Anonymous and Default user.
    c. Reset CustomAttribute1
    d. Add mailbox in **Org Exchange SG**
    e. Email Address policy enabled is unchecked.
6. For each distribution list, dynamic Distribution List in Organization
    a. Add DL in **Org Exchange SG**
    b. EmailAddress policy enabled is
7. Set Offline Address Book Schedule
8. Sets default PublicFolderMailbox of each Mailbox according to Organization setting.
9. Calls Update AL, GAL, AL, RAL, OAB

Generate Subscription Renewal Order

When a customer subscribes with a service automatic notifications are sent to the customer before the service expiration day comes closer. There are several configurable notices sent to the customer before and after the subscription expiration and before the service termination. You may configure these notices by going to System Configuration » Emails Configuration » Email Templates.

Subscription renewal notices are automatically generated before service expiration. But this is possible that you may want to change subscription renewal setting or generate renewal manually. To do this, navigate to the following path:

Navigation: Home » Customers Manager » Subscriptions List

Click the subscription name for which you want to generate renewal order. Click **Generate Renewal Invoice** button.

Adjusting Subscription Renewal Notifications

It is possible to adjust subscription renewal notifications. To do this, navigate to the following path:
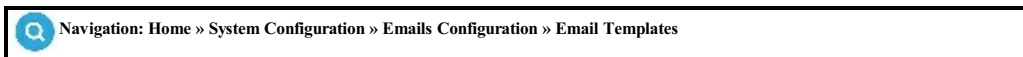
Scroll down to **Invoice Emails** and **Package Suspension/Enable Emails** groups and edit the desired email template.

See [Customizing Email Templates](#) for details on this topic.

Scroll down to **Invoice Emails** and **Package Suspension/Enable Emails** groups and edit the desired email template.

See [Customizing Email Templates](#) for details on this topic.

Adjusting Subscription Renewal Notification Periods

It is possible to adjust subscription renewal notification periods for your customer accounts. To do this, navigate to the following path:

Navigation: Home » System Configuration » Billing Configuration » General Billing

Offline Order Form

Offline Order form is used to create new reseller/customer and subscribe it for service on the same go. In order to create new customer and subscribe service navigate through the following path **Home » Customer Manager » Offline Order** then select the type of the customer from the drop down list.

There are two type of customers in control panel as described below:

Reseller:

1. If you want to create a reseller (for which you already have details like the customer name, email, and other details), you can do so by selecting "Reseller" from the drop down list. Fill in the compulsory fields and then click on the **Add Reseller** button.
2. If you want to subscribe the services on the same step, then click the **Add and Subscribe to Service** button. This will add the reseller and allow you option to subscribe for a service on the same step. For more details Click here.

End Customer:

1. If you want to create a customer (for which you already have details like the customer name, email, and other details), you can do so by selecting "End Customer" from the drop down menu in offline order form. You can create and subscribe service as an End customer by clicking on **Add and Subscribe to Service button** or you can click **Add Customer** to just create the customer and subscribe for services later form the "Customer Management" section. For further detail Click Here.
2. To subscribe services for existing customer Click here.

Note: New end customers can themselves subscribe for services using the online store build into control panel. Using this store users have the ability to view available service that they can purchase, create account in Control Panel and make payment of the purchased services. Their purchase will be automatically added to Control Panel, service that have been properly marked as paid will be automatically provisioned by the control panel and they will be able to manage their services. This entire process will be automated and minimum interaction of the provider will be required.

Read more about Store Configuration and setting up Order Forms.

Viewing Invoices

Invoice is the most important artifact of any business deal that shows the details of services/products which are rendered or sold with its particulars. This piece of document could be either an online document or a printed paper. Panel efficiently maintains the integrity control among invoices and correlation among different documents for a particular client.

To view an invoice you have to navigate the following path:

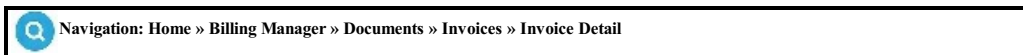> **Navigation: Home » Billing Manager » Documents » Invoices**
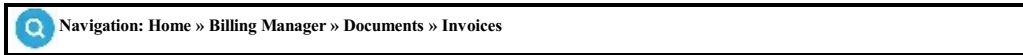
The **invoice** can be searched by filling in the following fields:

1. **Doc Num:** Doc Num is number of the document. It is unique.
2. **Customer ID:** It is the customer id.
3. **Customer Name:** It is the customer name.
4. **Invoice Status:** It is the status of an invoice i.e. due, partially paid, paid, cancelled, deleted or overdue.

You can filter the records by applying before & after date.

1. **Doc. Num:** Doc Num is number of the document. It is unique.
2. **Document Type:** It shows that it is an invoice.
3. **Document Date:** It displays the date on which the invoice is created.
4. **Customer ID:** It is the customer id.
5. **Customer Name:** It is the customer name.
6. **Total:** It shows the total amount for an invoice.
7. **Balance:** It displays the balance amount.

Click on Doc Num, or navigate to the following path:

> **Navigation: Home » Billing Manager » Documents » Invoices » Invoice Detail**

The following tabs are shown:

Details: Details tab provide you customer's information.

Invoices Paid: It shows the invoices that are paid

Billing Management Overview

The concepts involved are the following:

1. Document
2. Invoice
3. Invoice Status
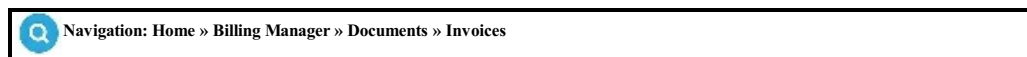4. Payment
5. Payment Status
6. Credit
7. Refund

Document

In each business environment several types of documents are associated which may include the invoices, payments document, credit document, refund document or any other document to demonstrate the status of any operation. Thus, Control Panel states such piece of artifacts as Document.

Navigation: Home » Billing Manager » Documents
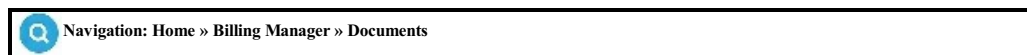
Invoice

Invoice is a primary document which shows a business deal, serve as the key entity in whole accounting and billing module of Control Panel and each single invoice carry a unique invoice number which is the identification of any invoice and also there is a status of the invoice.

Navigation: Home » Billing Manager » Documents » Invoices

Invoice Status

Each invoice is marked with some status that shows the standing of that particular invoice and the status can be one of the following:

Status	Description
Due	Payment is yet not made for the stated invoice.
Partially Paid	A part of total amount is paid for the stated invoice.
Paid	Total amount is paid for the stated invoice.
Cancelled	Invoice is cancelled due to some reason.
Deleted	Invoice is deleted due to some reason.
Over Due	Payment is not made for the stated invoice and the Due date have been reached over.

Payment

Payment is another type of the document which is generated when an invoice is paid or a business transaction is carried out against an invoice. Each payment document is uniquely identified by a document number or payment ID. Furthermore, there is some status which is plotted on each payment document.

Payment Status

Each payment document is marked with some status what shows the progress of the accounting/billing procedures to authenticate it. The status can be one of the following:

Status	Description
Completed	Payment document was created, payment is received and account has been provisioned.
Open	The payment document was created, payment is received but the account is not yet provisioned.
Refund	Total amount is paid for the stated invoice.
On Hold	Payment document is on-hold.
Cancelled	Payment Document has been cancelled.
Pending	Payment document was created and waiting to receive the payment.
Fraud	Payment has failed to authenticate and appeared to be fraudulent.

Credit

Credit Document is just similar to credit statement which gives you a summary of overall credit adjustments made over a specified time or for a specific client.

Refund

Refund document is also just same as of credit statement and it shows a summary of overall debit adjustments made over a span of time or for a specific client.

Documents

Control Panel involves certain concepts and key-terms, which carry particular meaning and help towards the use of different modules/features at the platform of Control Panel. The purpose of this document is to elaborate those specific concepts which are being used specifically in billing module and to facilitate you towards friendly adoption of Control Panel environment.

Navigate to the path:

Navigation: Home » Billing Manager » Documents

Documents may be searched by

1. **Doc Num:** Doc Num is number of the document. It is unique.
2. **Customer ID:** It is the customer Id.
3. **Customer Name:** It is the customer name.
4. **Document Type:** The following types of the documents are available:
   a. <u>Invoices:</u> It displays all the invoices and shows the status whether it is due, paid, partially paid cancelled or overdue.
   b. <u>Payments:</u> Payments also shows the status whether it is open, pending, fraud or completed.
   c. <u>Credit Adjustment:</u> It displays the record of documents type adjusted by credit.
   d. <u>Refunds:</u> It displays the record of documents type adjusted by debit.

Filter Record

You may filter your record by applying before and after date.

How to Cancel Invoice

You can cancel an invoice due to any reason, like in the case if payment is not made or any other reason. To cancel an invoice navigate to the following path:

🔍 **Navigation: Home » Billing Manager » Documents » Invoices**

Select the invoice which you wish to cancel, by clicking the invoice number (i.e. the Doc. Num).

Doing this will land you on following path:

🔍 **Navigation: Home » Billing Manager » Documents » Invoices » Invoice Detail**

Simply click on **Cancel Invoice** button under Operations section to cancel the invoice.

How to Print Invoice

The print media has never been less important, in certain cases you may need to print the invoice for any reason e.g. you have to fax/post the invoice to client etc. However, to print an invoice navigate to the following path:

Navigation: Home » Billing Manager » Documents » Invoices

Select the invoice which you wish to print, by clicking the invoice number (i.e. the Doc. Num)

Doing this will land you on following path:

Navigation: Home » Billing Manager » Documents » Invoices » Invoice Detail

Simply click on **Download PDF** button under Operations and then using the print option send print of your document.

How to Email Invoice

For any online business the email is a primary source of communication between client and business, most of the time you have to email the invoices to your client. Thus, to achieve this you have to navigate to the following path:

Navigation: Home » Billing Manager » Documents » Invoices

Select the invoice which you wish to send as email, by clicking the invoice number (i.e. the Doc. Num)

Doing this will land you on following path:

Navigation: Home » Billing Manager » Documents » Invoices » Invoice Detail

Simply click on **Email Invoice** button under Operations section to email the invoice. The invoice will be sent to the primary and alternate email addresses of the customer.

Viewing Payments

Payment is another type of the document, which is generated when an invoice is paid or a business transaction is carried out against an invoice. Each payment document is uniquely identified by a document number or payment ID. Furthermore, there is some status which is plotted on each payment document.

To view payments, you have to navigate the following path:

🔍 **Navigation: Home » Billing Manager » Documents » Payments**

 A **payment** can be searched by filling in the following fields:

1. **Doc Num:** Doc Num is number of the document. It is unique.
2. **Customer ID:** It is the customer id.
3. **Customer Name:** It is the customer name.
4. **Payment Status:** It is the status of a payment i.e. completed, open, refund, on-hold, cancelled, pending or fraud.

You can filter the records by applying before & after date.

1. **Doc. Num:** Doc Num is number of the document. It is unique.
2. **Document Type:** It shows that it is a payment.
3. **Document Date:** It displays the date on which the payment is done.
4. **Customer ID:** It is the customer id.
5. **Customer Name:** It is the customer name.
6. **Total:** It shows the total amount paid.
7. **Balance:** It displays the amount that is balance after the payment.

Click on Doc Num or navigate to the following path:

🔍 **Navigation: Home » Billing Manager » Documents » Payments » Payment Detail**

You can mark the payment **on-hold**, **Mark Fraud suspect** or may **Cancel payment**.

Viewing Fraud Payment

In any online business, where monetary transactions do occur, there always exists a certain level of fraud and theft, which is detect and defused by certain filter and precautionary measures, control panel also facilitates you to apply those full proof and comprehensive anti fraud filters which come as the built-in source towards proactive defense.

To view fraudulent payments you have to navigate the following path:

> **Navigation: Home » Billing Manager » Online Payments » Online Payments**

Select **Waiting Anti-Fraud Approval** tab.

You can search payment waiting for anti-fraud approval based on following filter criteria:

1. Select Company Name[Owner]
2. **Change Payment Method:** Select one of following: Online Payment, Offline Payment, Credit Adjustment
3. **Charge Status:** Select charge status as Pending , Charged, Authorized, Auth-Call, Cancelled, Refunded.
4. **Pay as:** Select pay as New, Recurring.
5. **Payment Gateway:** Select Payment gateway.
6. **Payment Group:** Select currency
7. **Payment Num:** Provide payment number.
8. **Customer ID:** Provide Customer ID.
9. **Customer Name:** Provide customer name.
10. **Credit Card No.:** Provide credit card number.
11. **Transaction ID:** Provide transaction ID.

Click **Search**.

Viewing Credits

Credit Document is just similar to credit statement which gives you a summary of overall credit adjustments made over a specified time or for a specific client.

To view Credits, you have to navigate to the following path:

Navigation: Home » Billing Manager » Documents » Credits

Credits can be searched by filling in the following fields:

1. **Doc Num:** Doc Num is number of the document. It is unique.
2. **Customer ID:**It is the customer id.
3. **Customer Name:** It is the customer name.

You can filter the records by applying before & after date.

1. **Doc. Num:** Doc Num is number of the document. It is unique.
2. **Document Type:** It shows that it is a credit.
3. **Document Date:** It displays the date.
4. **Customer ID:** It is the customer id.
5. **Customer Name:** It is the customer name.
6. **Total:** It shows the total.
7. **Balance:** It displays the balance amount.

Click on Doc Num, or navigate to the following path:

Navigation: Home » Billing Manager » Documents » Credits » Credit Detail

The following tabs are shown:

Details: Details tab provide you customer's information.

Invoices Paid: It shows the invoices that are paid

Viewing Refunds

Refund document is also just same as of credit statement, it shows a summary of overall debit adjustments made over a span of time or for a specific client.

To view Refunds, you have to navigate the following path:

The **refunds** can be searched by filling in the following fields:

1. **Doc Num:** Doc Num is number of the document. It is unique.
2. **Customer ID:** It is the customer id.
3. **Customer Name:** It is the customer name.
4. **Refunds Status:** It is the status of an refunds i.e. completed, open or cancelled.

You can filter the records by applying before & after date.

1. **Doc. Num:** Doc Num is number of the document. It is unique.
2. **Document Type:** It shows that it is an refunds.
3. **Document Date:** It displays the date on which the refunds are created.
4. **Customer ID:** It is the customer id.
5. **Customer Name:** It is the customer name.
6. **Total:** It shows the total.
7. **Balance:** It displays the amount in the specified currency.

How to Issue Refund

In daily business operations there are various adjustments and alterations, these changes can be caused by any of the reason either it could be in the favour of any discount of service interruption or refund on any product after sale or it could be due to any other reason. Thus, Control Panel allows you to make such adjustments to keep your billing/accounting up to date and error free.

To issue refund, you have to navigate to the following path:

Navigation: Home » Billing Manager » Documents » Payments

Search the payment document you want to refund, click on it and then click on **Cancel Payment** button. A new **Cancel Payment** window will pop-up. Click **Refund to credit card option** and submit.

Account Statement

Account statement is a type of another facilitating artifact which simply imitates a balance sheet which demonstrate what services or products you have bought, how much you have paid and how much balance is in your account. It gives a bird eye view of your account just in a while, furthermore you can have complete details of each invoice/payment for a product/service for a client which is seamlessly managed with the maximum consistency and integrity.

To view account statement for any client you have to navigate to the following path:

Navigation: Home » Billing Manager » Statements

You can locate the client by searching via any credentials provided (like Customer ID, Customer Name, Email, Payment Group) or by surfing page by page, select the client and you will be landed to the following interface which shows all of the related information for that particular client.

To search fill in the following fields and then click **Search** button.

1. **Customer ID:** Enter the customer ID.
2. **Customer Name:** Enter the customer name.
3. **Email:** Enter email address.
4. **Payment Group:** Select the currency.

It shows the following listing:

1. **Customer ID:** It shows the customer ID.
2. **Customer Name:** It displays the customer name.
3. **Balance:** It display the balance amount in USD etc.

Click on **Customer ID**, or navigate to the following path:

Navigation: Home » Billing Manager » Statements » Statement Details

You can see the account statement detail tab. It shows the **Summary**, **Filter record** and Balance forward in USD().

Note: If you support multiple currencies, it is important to choose the currency for which you want to view the statements from the drop down list. Control panel will list statements according to the payment group (currency).

Viewing Online Payment

Online Payments is made virtually and the actual transaction is made by the monetary agents, like your credit card broker or by the payment gateway. Thus, Control Panel provides a comprehensive mechanism for all online payment related issues. You can view or manipulate each payment accordingly and you can apply certain filters to restrict your search for a payment for a particular client against an invoice, in the case if there are a number of payments exists.

To view all online payment you have to navigate to the following path:

Navigation: Home » Billing Manager » Online Payments » Online Payments

Under **All Payment** tab you can see all payments listed:

You can search payments based on following filter criteria:

1. Select Company Name[Owner]
2. **Change Payment Method:** Select one of following: Online Payment, Offline Payment, Credit Adjustment
3. **Charge Status:** Select charge status as Pending , Charged, Authorized, Auth-Call, Cancelled, Refunded.
4. **Pay as:** Select pay as New, Recurring.
5. **Payment Gateway:** Select Payment gateway.
6. **Payment Group:** Select currency
7. **Payment Num:** Provide payment number.
8. **Customer ID:** Provide Customer ID.
9. **Customer Name:** Provide customer name.
10. **Credit Card No.:** Provide credit card number.
11. **Transaction ID:** Provide transaction ID.

Click **Search**.

Viewing On-Hold Payments

Limitation or constraints are enforced by each business in each circumstances, either flexible or stiff. In the case of online/offline payments there could be certain factor which may lead to hold a payment registration process, which could be either the one of verification processes or the client's authenticity, which could be worked out later on. Such payments are marked by "On-Hold" status in Panel payment queue.

To view On-Hold payments you have to navigate to the following path:

Navigation: Home » Billing Manager » Online Payments » Online Payments

Select **Payments On Hold** tab.

You can search payments On Hold based on following filter criteria:

1. Select Company Name[Owner]
2. **Change Payment Method:** Select one of following: Online Payment, Offline Payment, Credit Adjustment
3. **Charge Status:** Select charge status as Pending , Charged, Authorized, Auth-Call, Cancelled, Refunded.
4. **Pay as:** Select pay as New, Recurring.
5. **Payment Gateway:** Select Payment gateway.
6. **Payment Group:** Select currency
7. **Payment Num:** Provide payment number.
8. **Customer ID:** Provide Customer ID.
9. **Customer Name:** Provide customer name.
10. **Credit Card No.:** Provide credit card number.
11. **Transaction ID:** Provide transaction ID.

Click **Search**.

Viewing Waiting Approval

Pending payments are mostly appear on the scene when there is a twist of workload or the working hours, each business has its own standard of procedure to follow. For example: An order is to be worked out in next 6 hours since its queued though client might have made the payment too but actually the payment is yet not processed, it in the pending queue which will be transacted a while later. Thus, this could be the scenario or any other as per your business setup.

To view waiting approval payments, you have to navigate to the following path:

> 🔍 **Navigation: Home » Billing Manager » Online Payments » Online Payments**

Select **Waiting Approval** tab.

You can search waiting approval based on following filter criteria:

1. Select Company Name[Owner]
2. **Change Payment Method:** Select one of following: Online Payment, Offline Payment, Credit Adjustment
3. **Charge Status:** Select charge status as Pending , Charged, Authorized, Auth-Call, Cancelled, Refunded.
4. **Pay as:** Select pay as New, Recurring.
5. **Payment Gateway:** Select Payment gateway.
6. **Payment Group:** Select currency
7. **Payment Num:** Provide payment number.
8. **Customer ID:** Provide Customer ID.
9. **Customer Name:** Provide customer name.
10. **Credit Card No.:** Provide credit card number.
11. **Transaction ID:** Provide transaction ID.

Click **Search**.

You can select Payments and click **Approve** for bulk Payments.

For individual payment select **Approve** or **Decline** from Options column and click **Go**.

Viewing Pending for Transaction

Pending payments are mostly appear on the scene when there is a twist of workload or the working hours, each business has its own standard of procedure to follow. For example: An order is to be worked out in next 6 hours since its queued though client might have made the payment too but actually the payment is yet not processed, it in the pending queue which will be transacted a while later. Thus, this could be the scenario or any other as per your business setup.

To view payments pending for transaction, navigate to the following path:

Navigation: Home » Billing Manager » Online Payments » Online Payments

Select **Pending For Transaction** tab.

You can search payment pending for transaction based on following filter criteria:

1. Select Company Name[Owner]
2. **Change Payment Method:** Select one of following: Online Payment, Offline Payment, Credit Adjustment
3. **Charge Status:** Select charge status as Pending , Charged, Authorized, Auth-Call, Cancelled, Refunded.
4. **Pay as:** Select pay as New, Recurring.
5. **Payment Gateway:** Select Payment gateway.
6. **Payment Group:** Select currency
7. **Payment Num:** Provide payment number.
8. **Customer ID:** Provide Customer ID.
9. **Customer Name:** Provide customer name.
10. **Credit Card No.:** Provide credit card number.
11. **Transaction ID:** Provide transaction ID.

Click **Search**.

You can select Payments and **Try Transaction** for bulk Payments.

For individual payment select **Try Transaction** or **Register Transaction** from Options column and click **Go**.

Viewing Credit Card

Viewing credit card is subject to privacy however, there could be some reason to view the credit card details, it could be either out of verification process for a client's payment against some invoice or it could be any update of information provided.

To view a credit card you have to navigate to the following path:

Navigation: Home » Billing Manager » Online Payments » Credit Card

It shows the following listings:

1. **Card Number:** It displays the credit card number.
2. **Name On Card:** It shows the name of the credit card holder.
3. **Expiration Date:** It displays the expiry date.
4. **Status:** It shows the status of the card.
5. **Use for Recurring Billing:** It shows that whether it is use for recurring.
6. **Customer ID:** It shows the customer ID.
7. **Customer Name:** It shows the name of the customer.
8. **Option:** You can delete the credit card.

Viewing Transaction Logs

Transaction logs are generated when clients pay bills using the credit card.

To view the list of transaction logs being generated navigate to the following path:

> 🔍 **Navigation: Home » Billing Manager » Online Payments » Transaction Logs**

You can search transaction logs based on following filter criteria:

1. **Trans. ID:** Provide the transaction ID:
2. **Payment/Refund Num**: Provide payment \refund number.
3. **Customer ID:** Provide customer id.
4. **Customer Name:** Provide customer name.
5. **Card number:** Provide card number.
6. **Phone:** Provide phone number.
7. **Credit card last four digits:** Provide credit card last digits.
8. **Notes:** Search on the basis of notes provided.
9. **Status:** Following are the different status of the Transactions logs.
     i. **Approved:** Transactions that are approved.
     ii. **Declined:** Transactions that are declined due to some reason.
     iii. **Error:** Transactions that are having some error.
     iv. **Fraud:** Transactions with Fraud.

Register Offline Payment

In a real time business scenarios there are possibilities for local sales or indoor sales or there could be a case where you get the payment by hand or by any other means except electronic transfer which is not automated, there is the need to keep your billing and accounts up-to-date by registering the payment for that particular client/invoice manually into that system. Thus, Control Panel allows you to accomplish this task very efficiently and that leave no impact on the system.

To register offline payments, you have to navigate to the following path:

Navigation: Home » Billing Manager » Register Payments

And click on the **Register Offline Payments** tab, select the customer for whom you wish to register payment from the drop down list, provide the appropriate details and submit the form.

[Inv. ID ------ Total Due -------- Customer Name --------Owner--------- Due Date]:

Select due Invoice above then enter payment information below and click Submit button

1. **Date Paid:** Select Date
2. **Amount paid:** Enter amount paid.
3. **Transaction ID:** Provide transaction ID. (or Cheque/D.D/P.O #)
4. **Payment Method:** Offline
5. **Is approved:** Select if you want it to mark as approved.
6. **Send e-mail confirmation:** Select to send email confirmation.
7. **Comments:** Provide comments if any.

Click **Save** when done.

Adding Coupons

To add coupons, you have to navigate to the following path:

Click on the **Add Coupon** button and provide following:

1. **Coupon Code:** Provide coupon code.
2. **Discount Type:** Select discount type i.e. Percentage or Fixed
3. **Discount Value:** Provide discount value.
4. **Expiry Date:** Provide expiry date.
5. **Active:** Checkbox.

Click **Save** when done.

Adjusting Customer Balance

You can adjust a client balance by doing a Credit or Debit adjustment to the account. To do a Credit adjustment, navigate to the following path:

Navigation: Home » Billing Manager » Issue Credit

Select the client, enter your reference number in **_Reference number_** box, enter the amount and then enter credit memo in the **_comments_** box. Click **Save** button.

Estimated Usage Report

Estimated Usage Report report shows estimated Azure Bill for "Microsoft CSP subscriptions" and "VPS Metered Billing" along with customer and owner.

You can search your subscription report by any of the following:

1. Select **Company Name[Owner]**
2. **Product Type:** Select Product type. Estimated billing is available for Microsoft CSP and VPS hosting.
3. **Subscription Name**: Provide subscription name.
4. **Customer:** Provide customer name.
5. **Company name:** Provide company name

Click **Search** when done. You can **export to excel** your estimated Usage report.

How to Calculate Estimated bill?

Estimated Bill is available for azure and VPS metered billing. You can calculate Estimated bill for each subscription navigating to the following path and clicking on the subscription name you wish to calculate.
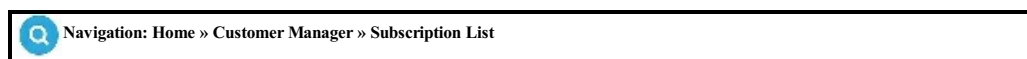
Once you click the subscription name, you will be on following navigation path:
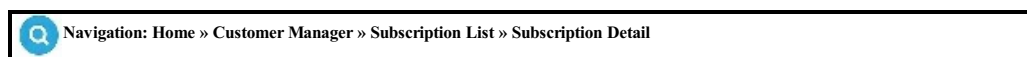
You will be able to view details of the subscription you have clicked and will be able to perform various operations on subscription. You will see following details on the Subscription Detail page.

General Info tab shows **Estimated Bill**

1. **Azure Bill Estimate:** It shows azure Bill Estimate. (For Microsoft CSP)
2. **Estimate calculated at:** It shows estimate calculated at:
   a. **Calculate Now:** Click to calculate now.
   b. **Detail:** Click to review details. It will open a new tab Estimated Usage Report showing detail per tenant along with customer name.

The path for Estimate detail is as below:

Billing Subscription Report

Billing Subscription report shows detailed billing for per subscription along with customer and owner.

You can search your subscription report by any of the following:

1. **Subsc.ID:** Provide subscription id.
2. **Customer ID:** Provide customer id.
3. **Customer:** Provide customer name.
4. **Domain Name:** Provide domain name.
5. **Package:** Provide package.
6. **Company name:** Provide company name

Click **Search** when done. You can **export to excel** your billing subscription report.

1. **Subscription:** It displays following details for subscription:
    i. **ID:** It shows the subscription id.
    ii. **Name:** It shows domain name.
    iii. **Package Type:** It shows the package type.
    iv. **Package Name:** It shows the name of package.
2. **Billing Summary:** It displays billing summary of each subscription as below:
    i. **Invoice ID:** It shows the invoice id.
    ii. **Original Price:** It shows the original price.
    iii. **Prorated Price:** It shows the prorated price.
    iv. **Quantity:** It shows quantity.
    v. **From Date:** It shows from date.
    vi. **To Date:** It shows to date.
3. **Customer:** It shows the name of the customer.
4. **Owner:** It shows the name of customer owner.

Help Desk Overview

Control Panel involves certain concepts and key-terms which carry particular meaning and help towards the use of different modules/features at the platform of Control Panel. The purpose of this document is to elaborate those specific concepts which are being used specifically in help desk module and to facilitate you towards friendly adoption of Control Panel environment.

The concepts involved are the following:

Active Ticket

Active ticket is a ticket waiting for a technician attention.

Waiting Ticket

When a technician replies to a ticket it goes to waiting state which indicates it is waiting for a confirmation from customer. A waiting ticket is automatically closed after certain number of days as configured in the settings.

Closed Ticket

Closed ticket cannot be update/replied without re-opening.

Agent User

An agent user is help desk technician who receives and handles tickets.

Departments

Department is a ways of streamlining company operation. Usually Sales, Support and Billing departments exist in a hosting company.

Email Parser

Email parser scans mailboxes and creates tickets out of emails.

Viewing Tickets

Both Provider and Customer can view and manage their tickets using the control panel. To view ticket as provider navigate to the following path:

Navigation: Home » Help Desk » Tickets

As help desk agent, you can perform following operation on a ticket:

1. Reply/update ticket
2. Transfer ticket to another department
3. Change ticket status (active/waiting/closed)
4. Delete ticket

New Ticket

A provider can submit/create ticket on behalf of the customer. You will need to do this when clients contact customer service through phone etc. To create a new ticket navigate to following path:

Navigation: Home » Help Desk » Tickets

Click on **New Ticket** button for submission of a new ticket.

Fill in the following fields:

1. **Customer:** Select the corresponding customer.
2. **Subject:** Specify subject that would appear as subject of the ticket.
3. **Department:** Select relevant department from available options.
4. **Priority:** Set the priority based upon the importance of the issue e.g. urgent, normal or low.
5. **Attachment (Optional):** This is an optional field that is not compulsory to be filled. Normally, it is a good practice to attach supplementary information as an attachment.
6. **Message:** The body of the message goes here.

Click on **Submit** button to submission of newly created ticket.

Search Ticket

You may search for a ticket by

1. Ticket number
2. Sender email
3. Ticket subject

To search for a ticket navigate to following menu:

Navigation: Home » Help Desk » Tickets

On the top of page, there is Search box. Fill in the following fields:

1. **Value:** Enter the value.
2. **Department:** Department can be added and removed from the Help Desk. You can search for tickets based on the department they are from. Couple of departments have been created for you by default as follows:
   - Support Department
   - Billing Department
3. **Field:** The field may be ticket #, sender email or subject.

and click on **Search** button.

Actions

Actions can be performed on ticket(s) to change their look and feel or to change their behavior. Actions can be performed for a single ticket or for multiple tickets that are selected from the ticket views. You just need to **(i)select the ticket** or multiple tickets,**(ii)choose the action** you want to perform on the ticket(s) and click on **(iii)Change** button to apply that action.

To perform actions on tickets navigate to the following path:

Navigation: Home » Help Desk » Tickets

Below is some explanation of each action that can be performed on ticket(s).

1. **Stick Ticket(s):** Stick means to keep the ticket on top of the ticket list, regardless of the time it arrived on or the priority it has. You can stick the tickets that you want to monitor intensively.
2. **Unstick Ticket(s):** Unstick is to release stick option so that ticket is put into regular order in the ticket list.
3. **Delete Ticket(s):** Allows you to delete the selected ticket(s).
4. **Block E-mail:** Allows you to block the email address from which the ticket was received.
5. **Change Status To:** Allows you to change status of selected ticket(s). You can change the statuses to Active, Waiting, Closed or Cancelled.
6. **Change Department To:** Allows you to switch department of the selected ticket(s). For example, if a ticket has been placed in the support department, but it should actually be for the billing department, you can change its department by selecting the ticket (s) and then after selecting the target department, click on **Change** button to switch department of the ticket.
7. **Assign Ticket To:** Allows you to assign the ticket to specific help desk agent user.

Change Page Refresh Interval

Ticket listing interface gets refreshed automatically on a pre-set interval. You may change this interval by selecting the new interval value from "Page Refresh Interval" drop-down box. To do this navigate to the following path:

Block Email

You can block unwanted email addresses. When you block an email address, the help desk system stop receiving further emails from that address. To block email navigate to the following path, select the ticket you wish to block and then select "Block Email" from the Actions drop-down box.

Managing Agents

Help Desk agents are the staff members of your company. To assign help desk agent you should add a staff member first.

How to add a staff member?

To add a staff member navigate to following path:

> 🔍 **Navigation: Home » System Configuration » System Users » Staff Users**

Make sure that you assign "Help Desk Administrator" role to the staff member. Once staff member is added navigate to the following path to activate him as Help Desk Agent and assign departments and permissions.

> 🔍 **Navigation: Home » Help Desk » Agent Users**

Click on **Add Agent** button to include a new held desk agent.

Managing Help Desk Agents

Agent User

An agent user is help desk technician who receives and handles tickets. First you need to add a [Staff Member](#), only then you will be able to activate that member as an agent in Help Desk.

Once staff member is added navigate to the following path to activate him as Help Desk User and assign departments and permissions.

Navigation: Home » Help Desk » Help Desk Users>

Agent users can be edited/removed by clicking on **Edit** or **Remove** link respectively, allowing management of Help Desk agent users.

Clicking on **Edit** link to modify help desk agent will direct to the following navigation path:

Navigation: Home » Help Desk » Help Desk Users » Edit Agent user

Click on **Add Agent** button to include a new help desk agent. You will be directed to the following navigation path:

Navigation: Home » Help Desk » Help Desk Users » Add Agent user

You can add new Help desk agent and define his/her permission rights & privileges. Following mandatory fields must be filled in to complete the process:

1. **Title:** The nick name used for the help desk agent user.
2. **Default Signature:** These signatures will be used by default for communication.

Clicking on **Save** button will update changes.

Set Support Signature

To set support signature navigate to the following path and click on **Edit** link under Options. Enter your signature in *Default Signature* box.

Navigation: **Home » Help Desk » Help Desk Users » Agent Users**

Viewing Manage Departments

You may create unlimited number of departments in Control Panel. To create and manage departments, navigate to the following path:

🔍 **Navigation: Home » Help Desk » Departments » Manage Departments**

An existing department can also be modified or deleted right away simply by clicking on **Edit** and **Remove** respectively. Furthermore, a copy of department can also be created by clicking on **Clone**.

Clicking on **Edit** to modify department will direct to the following navigation path:

🔍 **Navigation: Home » Help Desk » Departments » Manage Departments » Edit Department**

Click on **Add Department** button to create a new department.

🔍 **Navigation: Home » Help Desk » Departments » Manage Departments » Add Department**

Managing Departments

Control Panel allows you the option to have your organizational structure in control panel as it actually exists. You can create departments and have staff members manage their respective departments. For example, the Billing Department can handle tickets related to billing and Support Department can handle tickets related to support.

You may create unlimited number of departments in Panel. To create and manage departments navigate to the following path

Navigation: Home » Help Desk » Departments » Manage Departments

How to customize department's email?

For each department there are several customizable email templates available. The templates include:

1. Confirmation of posting ticket
2. Ticket updated notification
3. Ticket assigned notification
4. Ticket forwarded notification
5. Ticket closed notification
6. Ticket Auto closed notification
7. Challenge /Response

To customize these template navigate to following path.

Navigation: Home » Help Desk » Departments » Manage Departments » Email Confirmations

Email Confirmations

For email confirmations navigate to following path and select **Email Confirmation** under **Options** and click **Go** to edit email confirmations:

Navigation: Home » Help Desk » Departments » Email Confirmations

This page will display the following listing:

1. **Department Name:** It displays the name of the department.
2. **Description:** It shows the description of the department.
3. **Internal:** It displays whether it's status is internal or not.
4. **Tickets:** It displays the number of the tickets.
5. **Options:** Select if you want email confirmation. Click on **Go** to edit email confirmations.

How to Add Department

To add a department navigate to the following path and click on the **Add Department** button:

Fill in the following fields:

1. **Title:** Enter title of department here.
2. **Description:** Provide description about department.
3. **Email from address:** Email address to be used as the From Email Address.
4. **Email from name:** Email from name that will be displayed to email recipient.
5. **Hours of inactivity to auto-close a ticket (0 is never auto-close):** Ticket can be automatically closed if there is no activity on the ticket after the specified number of hours of inactivity.
6. **Internal:** Internal department does not show up on new ticket form. It can be used to create private departments.
7. **Admin Access:** Choose the Agent User as administrator of the department.

Then, click on **Save** button.

Note: You can also clone, edit and remove departments.

General Settings

Here, you can view the general settings of Help Desk. You may configure different settings for help desk like General Settings, Statuses, Priorities and Blocking Filters.

On the General Settings page you may configure Challenge/Response, and other advanced settings.

You can view the following sections:

Challenge/Response:

1. **Require registration before users can submit tickets**: Check or uncheck.
2. **Auto-Generate support accounts for incoming emails that do not match an existing account:** Check or uncheck.
3. **Require users to confirm registration:** Check or uncheck.
4. **Kill e-mails that fail to respond to challenge e-mail after this time:** Select the time period from the drop down list.
5. **Auto remove tickets from Deleted tickets:** Select Days from dropdown list.

Advanced Settings:

1. **Hide Helpdesk from Client:** If you want to hide help desk from client the check this option.
2. **Allow public users to re-open their own tickets:** Check this option.
3. **Ticket # Prefix:** Provide ticket no prefix.
4. **Ticket # Postfix:** Provide ticket no postfix.
5. **Maximum attachment file size (in megabytes):** Provide the maximum file size in MB for attachment. (0 for unlimited)
6. **Show maximum of:** Provide no of ticket shown(tickets per page in public section. (0 = no limit)).
7. **Ticket auto close:** Check or uncheck.
8. **Waiting period:** Select waiting period from the drop down list.

Click on **Save** button when done.

Challenge Response

Challenge Response is a feature that prevents SPAM emails from reaching the Help Desk.

How it works?

Whenever email is received in a department the sender email ID is matched against the control panel database. If it is found in the database as a valid user, ticket is generated and placed in the system. But if email address is not found in the control panel database, then a Challenge-Response email is automatically sent to the sender email address with URL link to visit. If URL is visited then sender is confirmed and added to control panel database. This sender never receives challenge-response email again.

To configure challenge response system navigate to following path:

Navigation: Home » Help Desk » Settings » General Settings » General Settings

Make sure that ***Require users to confirm registration*** is checked and select the auto-kill interval from the drop-down box in front of ***Kill e-mails that fail to respond to challenge e-mail after this time.*** Kill e-mail means that the e-mail is deleted if the link/URL in challenge response email is not clicked.

Manage Status

Statuses regarding particular tickets can be manipulated from here:

Following parameters are displayed:

1. **Active Ticket:** Active ticket is a ticket waiting for a technician attention.
2. **Waiting Ticket:** When a technician replies a ticket it goes into waiting state which indicates it is waiting for a confirmation from customer. A waiting ticket is automatically closed after certain number of days as configured in the settings.
3. **Closed Ticket:** Closed ticket cannot be update/replied without re-opening.
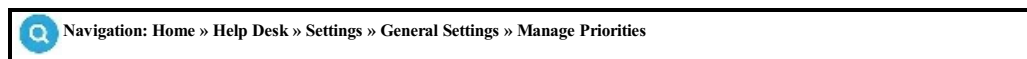
Customized statuses can be created putting in the Status Title and clicking on **Save** button.

By clicking on **Edit** link enables modification of statuses.

Statuses created by provider can be deleted by clicking on **Delete** link.

Manage Priorities

Priorities regarding ticket can be manipulated from here:

🔍 **Navigation: Home » Help Desk » Settings » General Settings » Manage Priorities**

Following parameters are displayed:

1. **Urgent:** Indicates that it is of high importance and critical.
2. **Normal:** Depicts priority with medium level importance.
3. **Low:** Not that important.

Customized priorities can be created by putting in the Title and clicking on **Save** button.

By clicking on Edit link from following navigation path enables modification of priorities:

🔍 **Navigation: Home » Help Desk » Settings » General Settings » Manage Priorities**

Priorities created by provider can be deleted by clicking on **remove** link.

Blocking Filters

Blocking filters for different entities like email, IP address or domain can be defined using following navigation path:

Navigation: Home » Help Desk » Settings » General Settings » Blocking Filters
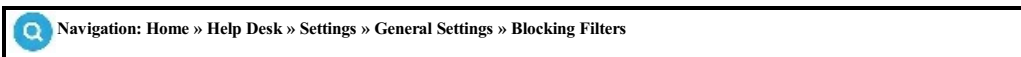
Following parameters should be completed:

1. **Block Value:** Specify the IP address, email address or domain name depending upon the block type.
2. **Block Type:** Select type of entity you want to block.

Customized blocking filters can be created putting in the Block Value and clicking on **Save** button.

Clicking on **Edit** link enables modification of blocking filters.

Similarly, blocking filters can also be deleted by clicking on **Remove** link.

Configuring Email Parser

There are two methods of opening a help desk ticket in Control Panel. First is using web based interface in the Customer Control Center while the second is through direct email.

What is email parser?

Email Parser is a built-in feature which retrieves emails from IMAP accounts and generates tickets from them. For example, if you have a support@xyzhost.com email address you may configure it in email parser so that whenever an email is received at this address a ticket is automatically generated for an existing customer account.

To configure email parser navigate to following path:

Navigation: Home » Help Desk » Settings » Email Parser » IMAP Accounts

Click on **Add IMAP Account** button and provide the information of the IMAP account from where you want to retrieve and generate tickets.

1. **Email Address:** Specify email address of the account from where emails are to be retrieved.
2. **IMAP Server:** Enter designated POP3 server.
3. **Port:** Mention appropriate port. Default IMAP port is 110.
4. **User name:** Enter user name. This is usually same as the email address of target account.
5. **Password:** Specify password corresponding to user name.
6. **Confirm password:** Re-type password for confirmation.

You can edit IMAP account by clicking on **Edit** link and provide the information.

Processing Rules

You may configure Processing Rules for each POP account. Processing rules tell Control Panel what should be done with the email. For example:

- Create a processing rule to assign tickets to Support Department if TO line is support@xyzhosting.com.
- Create a processing rule to delete the email if subject line includes "[Spam]".

To create processing rule navigate to following path:

Navigation: Home » Help Desk » Settings » Email Parser » IMAP Rules

Click on **Add New Rule** button and provide the required information on screen.

IMAP Rules

You may configure Processing Rules for each IMAP account. Processing rules tell Control Panel what should be done with the email. For example:

1. Create a processing rule to assign tickets to Support Department if TO line is support@xyzhosting.com.
2. Create a processing rule to delete the email if subject line includes "[Spam]"

To create processing rule navigate to following path:

> 🔍 **Navigation: Home » Help Desk » Settings » Email Parser » IMAP Rules**

You can also edit existing IMAP rules by clicking on **Edit** link and provide the information.

Click on **Add New Rule** button and provide the required information on screen.

1. Select the Condition for your rule
    i. **Where:** Select "Subject, Body, Sender or Recipient"
    ii. **Contains:** Specify contains.
2. Select the Action for your rule
    i. **Forward to department:** Select department, <u>added department</u> will be shown here.
    ii. **Assign To:** Select user to assign.
    iii. **Set Status:** Set status
    iv. **Override Priority:** Set priority.
    v. **Delete Message:** Check if you want to delete message.

Click **Save** when done.

Service Director Overview

The control panel serves as the central hub for managing various services and operations. It offers a comprehensive interface designed to streamline customer interactions and administrative tasks. Key features of the Service Director include:

1. **Service Queue:** This is the central action point where all tasks requiring intervention are listed. It also includes actions processed automatically by the control panel.
2. **Report Scheduling:** Schedule and generate various types of reports to monitor and analyze system performance.
3. **Audit Logs:** Access detailed logs to track system activities and changes for compliance and security purposes.
4. **AD Organizations and Users Management:** Efficiently manage Active Directory (AD) organizations and users.
5. **Service Configuration and Management:** Configure and manage a variety of services including:
    1. Shared Web Hosting
    2. Exchange Hosting
    3. SharePoint
    4. CRM
    5. Skype for Business
    6. Work Folders Hosting
    7. RDS Hosting
    8. Microsoft CSP
    9. Virtual Machines Hosting
6. **Usage Reports:** View detailed reports on service usage and performance.
7. **Group Actions Log:** Monitor and manage group actions for all services, including AD sync.
8. **DNS Zone Management:** Add and manage DNS zones for your domain.
9. **SSL Account Management:** Manage SSL accounts to ensure secure communication and data integrity.

Managing Service Queue

Service Queue is used to manage new orders provisioning, renewal, deletion, suspension etc. It is central location where the provision staff can view the incoming orders, their status, leave notes and manually control the failed orders.

To view Service Queue navigate to the following path:

Navigation: **Home » Service Director » General » Service Queue**
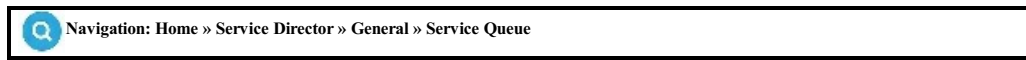
The *service queue* tab displays following:

1. **Command:** Shows the task in the queue. It is usually in the following format:
    a. <u>Account Name(Provider Name)</u> So, if you see command "*Renew Domain: somedomain.com (eNom)*" then you understand that this is domain renewal with eNom provider.
    b. <u>Action name:</u> It shows the Action performed.
2. **Status:** Indicates the current status of the command.
    i. **In-Q:** Indicates the service provisioning is in the queue waiting for the provisioning. A service may remain In-Q if the subscription is unpaid or if the Control Panel Provisioning Service is stopped.
    ii. **Error:** Indicates an error condition during the provisioning. Click on it to see the error detail.
3. **Date Entered:** The date when item entered in the queue.
4. **Tries:** Total number of tries to provision the service automatically.
5. **Last Tried:** The date/time when service was last tried.
6. **Customer ID:** The customer id.
7. **Customer Name:** The customer to which the service belongs.
8. **Reactive:** Click on reactive to active the service.
9. **Run:** Click on this button to attempt to provision service.
10. **Control:** Click on this button to manually provision a service. This is very useful in two scenarios:
    i. **Manual Provisioning:** For those services which cannot be provisioned automatically you can use **Control** button to provision. For example, Dedicated server provisioning.
    ii. **Provisioning Failed Orders:** If for any reason an order is failing to provision you may use the **Control** button to provision it.

Note: When using **Control** button to provision service you MUST deploy the service manually with the appropriate provider.

The *Settings* tab offers you the opportunity to handle the processing of service queue items.

1. **Auto processing of service queue items enabled:** Check it you enable auto processing of service queue items.
2. **Provisioning service interval:** Select intervals from the drop down list.

Recycle Bin

Recycle Bin is a new feature to soft delete mailboxes in order to avoid accidental deletion of User mailboxes. You can either restore the mailboxes or permanently delete from control panel and backend Exchange servers by navigating to Recycle Bin.

To view Recycle Bin you have to navigate to the following path:

Navigation: Home » Service Director » General » Recycle Bin

Exchange mailboxes

Under this tab you can search and select Mailboxes and then either perform **Permanent Delete** or **Restore**.

Settings

Under settings tab you can select **number of days** to automatically delete user mailboxes. Selecting **Do Immediately** will delete immediately all the deleted mailboxes.

Recovery

Recovery is a feature to recreate permanently deleted mailboxes or to reconnect from Exchange disconnected mailboxes. This feature is in Beta.

To view recovery, navigate to the following path:

Navigation: Home » Service Director » General » Recovery

Select Mailboxes to either **Recreate** or **Connect Mailbox**.

Viewing Workflows

To view and manage workflows navigate to the following path:

Provide any of the following field for search and click **Search** button.

1. Select Company Name [Owner]
2. Select workflow type
3. Select status
4. Workflow name
5. Data
6. Customer

It shows following in the listing:

1. **Owner:** It shows the name of owner of customer.
2. **Customer:** It shows the name of customer.
3. **Workflow:** It shows the name of workflow.
4. **Workflow Type**: It shows the workflow type.
5. **Details:** It shows details as below:
    i. **Status**: It shows status such as Completed
    ii. **Created On:** It shows the date when workflow was created.
    iii. **Scheduled:** It shows the when the workflow is scheduled.
    iv. **Executed on:** It shows when the workflow is executed last time.
    v. **Tries count:** It shows total number of tries.
6. **Option:** It shows the option to **Execute** and **Remove**.

Adding Workflow

To add a new workflow navigate to the following path:

Click **Add Workflow** button and provide following:

1. **Workflow type:** Select the type of the workflow.
2. **Select Owner:** Select owner of the customer
3. **Select Customer:** Select Customer from the dropdown.
4. **Workflow name:** Provide the friendly name of workflow.
5. **Workflow description:** Provide description.
6. **Select organization:** Select organization
7. **Select Active Directory User(s):** Select Active directory users.
8. **Schedule:** Click Schedule in order to schedule the workflow.
9. **Execution date:** Select execution date.
10. **HoursMinutesExecution time:** Provide the time for execution of the workflow.

Click **Save** when done.

Audit Logs

A log of changes and have complete details of each action performed in control panel by the customer\user\client withe Date and Time and IP address. Now offers audit logs for the changes being performed in Control Panel with the Date, Time, Login, IP address and other Details mentioning the Event and the Event Group name.

To view audit logs you have to navigate to the following path:

Navigation: Home » Service Director » General » Audit Logs

You can locate the client by searching via any credentials provided (like Date, Login, IP Address, Event Group) or by surfing page by page, select the client and you will be landed to the following interface which shows all of the related information for that particular event.

To search fill in the following fields and then click **Search** button.

You can also **Load Audit Logs from Archives**.

The Audit Logs displays the following:

1. **Date:** The date column shows the date with the time stamp.
2. **Login:** The Login column shows that who logged into the Control Panel.
3. **IP Address:** The IP address column shows the IP address of the server.
4. **Event Group:** The Event Group column shows the name of the event group such as Emails, Service plans, Mailbox, Login etc.
5. **Event:** The event column shows the name of the event such as create\add\delete\edit etc.
6. **Details:** The detail column shows the details.

Configuration

Select **Configuration** tab to configure rotation of Audit Logs.

1. **Remove Audit Log entries after:** Provide number of days to auto delete logs.
2. **Send Email:** Select check box to send email notification.
   a. **Send To (Email Address):** Provide email address.
   b. **From Address:** Provide from email address.
   c. **Email text:** Enter text.

Click **Save** when done.

Group Jobs and Group Jobs Settings

To view Group Jobs you have to navigate to the following path:
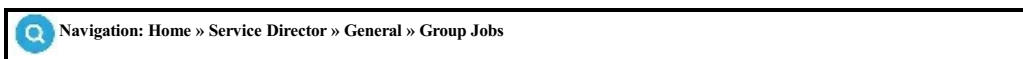
Group Jobs tab will list all service type group Jobs in one interface and can be filtered for each service type.

In order to allow service provider to configure Number of Group jobs to process and their respective priority, click on **Group Jobs Settings** tab:

It has Exchange, CSP, Skype4B, SharePoint, CRM and AD Group Actions types. Now we can set the priority of a job execution on the basis of action type. We can set number of threads to execute simultaneously through this interface.

Priority index is from 0 to 10 , 0 is a highest priority and 10 is the least priority. There is a Reset Priority Order to System Default button, it will reset to default priority which is according to panel domain experts.

1. You can see group action types for all automation modules in grouped interface i.e. panel for each extension with proper heading.
2. For each automation module in Panel have selection for Number of group jobs to process simultaneously ranging between 1 to 5.
3. Provide Priority index in dropdown for each action type inside particular automation module.

Click on **Save** Settings button when done.

Viewing Usage Reports (All)

You can view usage reports of all the services in use on one page. To view all kind of supported usage reports, navigate to the following path:

> 🔍 **Navigation: Home » Service Director » General » Reports**

Select **Usage Report** tab.

Microsoft Exchange

1. Organizations
2. Mailboxes
3. Mailbox Manager
4. View SPLA Report

Microsoft CSP

1. Microsoft CSP Account
2. Microsoft CSP Usage Report
3. Monthly Reseller Report
4. License Usage Report

VPS

1. VMs
2. View report

Skype4B

1. Organizations
2. Users
3. View SPLA Report

Active Directory

1. Organizations
2. Users

Microsoft SharePoint

1. Portals
2. Users
3. View SPLA Report

Microsoft CRM

1. Organizations
2. Users
3. View SPLA Report

Work Folders Hosting

1. Organizations
2. Work Folders

RDS Hosting

1. Organizations

Web Hosting

1. Domains

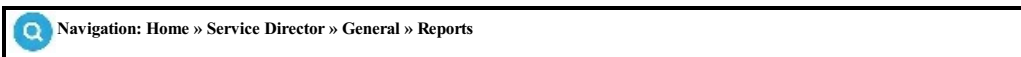2. Plesk Domains
3. View report

Quota Over Used

It shows all the subscriptions which have overused quota for resellers and customers so you can sell addon to resellers and customers in bulk.

1. Resellers
2. Clients
3. Quota Over Usage report

Quota Over Usage report

You can view Quota Over Usage report of all the subscriptions. Navigate to the following path:

Select **Usage Report** tab. Now click **Quota Over Usage report**.

You will land on following page:

Under **Subscriptions** tab you will see following:

1. **Status:** It shows status of the subscription.
2. **Subsc.ID:** It shows the subscription Id.
3. **Subscription Name:** It shows the subscription name.
4. **Owner:** It shows the owner or reseller name.
5. **Customer:** It shows the customer name.
6. **Actions:** It shows two options:
   i. **Purchase more:** It will take you to **Buy addon** page where you can select available addons and purchase as required. See more details for <u>Purchase more resources.</u>
   ii. **View Details:** It will show you how many resources are allocated utilized and remaining along with subscription name and id under **Over Used Resources** tab.

Usage Reports Schedule

To schedule emails for usage reports, navigate to the following path:

Select **Usage Report Schedule** tab. It shows the following listings:

1. **Report:** It shows the name of the report.
2. **Send Frequency:** It shows the frequency at which reports sent.
3. **From:** It shows the from address.
4. **Send To:** It shows the send to address.
5. **Actions:** It shows the actions to Edit and Remove.

Click on **Add New Schedule** button to add a new schedule. Under **Usage Report Schedule Settings** section, **select report(s) to schedule.**

1. **Send To (Email Address):** Provide Send To email address.
2. **From Address:** Provide From Address.
3. **Email Text:** Provide text.
4. **Send Frequency:** Select frequency for emails from the drop down list.
5. **Time to Send:** Provide time in hours & minutes.

Once done click on **Save** button.

Sell Bulk Add-ons To Resellers

You can sell bulk add-ons to resellers in case of over used resources. Navigate to the following path:

> 🔍 **Navigation: Home » Service Director » General » Reports**

Select **Usage Report** tab. Now click **Quota Over Usage report**.

You will land on following page:

> 🔍 **Navigation: Home » Service Director » General » Quota Over Usage report**

Select **Sell Bulk Add-ons To Resellers** tab.

1. **Select Reseller:** Select resellers from Selectable to Selected.
2. **Select Package Type:** Select package type like Exchange etc.
3. **Select Provider:** Select provider like Exchange 2019.
4. **Select Add-on:** Select add-on from the dropdown list.
5. **Quantity:** Provide quantity of addons to be sold.
6. **Sell only to subscriptions where quota is over used:** Check box
7. **Create copy of add-on under reseller for reseller's clients:** checkbox

Click **Save** when done.

Sell Bulk Add-ons To Customers

You can sell bulk add-ons to customers in case of over used resources. Navigate to the following path:

Select **Usage Report** tab. Now click **Quota Over Usage report**.

You will land on following page:

Select **Sell Bulk Add-ons To Customers** tab.

1. **Select Owner:** Select Owner from dropdown list.
2. **Select Customer:** Select customers from Selectable to Selected.
3. **Select Package Type:** Select package type like Exchange etc.
4. **Select Package:** Select package sold to the customers.
5. **Select Add-on:** Select add-on from the dropdown list.
6. **Quantity:** Provide quantity of addons to be sold.
7. **Sell only to subscriptions where quota is over used:** Check box

Click **Save** when done.

Remote Servers

To view all remote servers integrated into control panel, navigate to the following path:

Remote Servers can be filtered for each service type.

It show following listings:

1. **Actions:** You can perform following actions for each server.
    a. **Test Service:** Click **Test Service** of the respective services type.
    b. **Details:** You can review details for each server.
    c. **Update:** You can perform Update for remote servers.
2. **Status:** It shows status enable/disable.
3. **Name:** It displays the name of the Server.
4. **IP Address:** It shows the IP address of the server
5. **Reference Id:** It shows the reference name of the server.
6. **Server Group Name:** It displays the name of the Server Group.
7. **Version:** It displays the version of the server.
8. **Active Directory Domain:** It shows the Active Directory.
9. **Login Name:** It displays the administrator Login.
10. **Service Type:** It shows Exchange, SharePoint etc.

Load Balance Servers

Load balanced deployment of Control Panel allows hosting service providers to ensure the high availability of their Hosting Panel and the services they offer through Control Panel.

You can add new load balance server by clicking on **Add Peer Server.** Under **Peer Details** provide below information.

1. **Peer IP:** Provide Peer IP
2. **Peer Port:** Provide port for peer.
3. **User Name:** Provide user name.
4. **Password:** Provide password.

Click **Save** when done.

It displays following listing:

1. **Peer IP:** It shows peer IP address.
2. **Peer Port:** It shows the peer port in use.
3. **User Name:** It shows the user name.
4. **Server Role:** It shows the server role primary or secondary.
5. **Actions:** You can **Edit** existing peer details or **Remove** it.

Threads Manager

To view thread and manage its time interval navigate to the following path:

Provide any of the following field for search and click **Search** button.

1. Thread Name
2. Server IP

Update button is to update settings for logging enabled/disabled. It shows following in the listing:

1. **Logging Enabled:** check box
2. **Server IP:** It shows the server IP.
3. **Thread Name:** It shows the name of the thread.
4. **Service Name:** It show the name of the service in use by the thread.
5. **Status:** It shows the status such as Queued.
6. **Time Interval in Seconds:** You can select time interval for each thread and click **Update Interval**.
7. **Last run:** It displays the last run of the thread.
8. **Options:** It shows option to Run and Disable.

Email Log

To view email log, navigate to the following path:

You can search email log by following Date after, Date before, Company Name [Owner], Subject Email, Type, Status, Attachment and To/Cc/Bcc.

It displays following listing:

1. **Company Name:** It shows company name.
2. **Email To:** It shows the email address to which email sent to.
3. **Date:** It shows the date.
4. **Subject:** It shows the subject.
5. **Email Type:** It shows the service type.
6. **Options:** It shows the options such as Details , Resend, Remove.

Dedicated Hosting

You can view dedicated servers list by navigating to following path:

Service Management: Click on this link to manage dedicated servers.

1. You can store, view and edit **General Information** of the server.
2. You can view and manage summary, services, drivers, IPs, Event Logs, Users, Reboot the server and start/stop Processes under Server Controller area.
3. You can view **IP Addresses** assigned to the server.
4. The **Advanced** section contains information related to **Remote Reboot** and **Root Login** for the server.

IP Management Overview

IP Pools: The IP address assets are managed through groups called IP Pools. IP pools can be assigned to particular type of services e.g. shared hosting etc. When IP pool is assigned to a specific service it can be provided to the subscriptions related to that service.

To view IP Pool navigate to the following path:

Navigation: Home » Service Director » General » IP Addresses
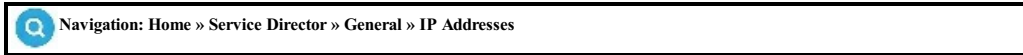
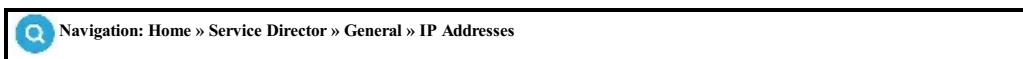Click **Add IP Pool** button to add new pool. The **IP Pool** tab shows following:

1. **Identification:** It shows name for this IP pool. Example: Gold_Reseller_Block_C.
2. **Hardware node:** It shows hardware node where the IPs are routed.
3. **Total:** It shows total number of IPs.
4. **Leased:** It shows total number of leased IPs.
5. **Excluded:** It shows total number of excluded IPs.
6. **Enabled:** It shows it status..
7. **Options:** You can **Delete** IP pool here.

The **IP Addresses** tab displays following:

1. **IP Address:** Click on IP Address to manage pool detail.
2. **Status:** It shows the status of IP for e.g. Free
3. **Lease:** It shows if it is leased.
4. **Date:** It shows the Date.

Add IP Addresses

To add IP Pool navigate to the following path:

Click **Add IP Pool** button. The add IP pool screen shows following:

1. **Identification:** Enter a friendly name for this IP pool. Example: Gold_Reseller_Block_C.
2. **Hardware node:** Select the hardware node where the IPs are routed. The servers in this list come from Server Groups. See
3. **Automatic IP collection:** Check if you want to enable.
4. **Enabled:** Checked.

Click **Save** button when you are done.

Note: This procedure creates IP address pool and attempts to setup IPs on the hardware node too. Appropriate success/failure message will show.

Pool Detail

Details related to IP Pools are enlisted here. At the **Summary** tab You can clearly see the list of IP addresses that are added in IP Pools. Also following operation can be performed:

Click **Add IP in Pool** to add new IP address in IP Pool. See details [Adding IP Address](#)

To enable NAT click on **NAT Mapping** button.

> 🔍 **Navigation: Home » Service Director » IP Addresses » Pool Detail » NAT Mapping**

Fill in these fields:

1. **Enable NAT for this IP Pool:** Check if you want to enable.
2. **Start Private IP:** Select start IP address and provide Map to public IP address.
3. **End Private IP:** Select end private IP address and provide Map to public IP address

And then click on **Save** button.

To exclude or include an IP address from automatic allocation, for this click on **New IP Exclusion.**

Leases: This tab show the IP address that has been leased.

Exclusions tab displays the IP addresses that have been excluded which cannot be assigned to any subscription.

Lease IP Address

IP address can be leased to active subscriptions. Leasing IP address lets you effectively manage your IP pool.

To lease IP navigate to the following path:

Follow the steps:

1. Click the IP Pool identification to which the IP belongs. You will see **Pool Detail** screen.
2. Click on the **Lease** link beside the IP address.
3. Select the client from the **Select Customer** list.
4. Select the subscription from **Subscription** list.
5. Select lease period **Lease period** options.

Click on **Allocate IP** button when you are done.

Logs Explorer

The logs explorer in the panel provide administrators and other users the ability to download and view the control server and remote server logs without logging into the server.

To view logs for control and remote servers navigate to the following path:

> **Navigation: Home » Service Director » General » Logs Explorer**

Provide any of the following field for search and click **Search** button.

1. Provide Log file Name
2. For Remote Server logs provide **IP address** of the remote server.
3. Select date **Last Updated** and **To Date**.

It shows following listings for **Logs Explorer**:

1. **File Name:** It displays the log filename.
2. **Date Created:** It displays the date when log was created.
3. **Date Modified:**It displays the date when logs was last modified.
4. **Options:** It displays option to **Download** and **View**.

Active Directory Management

Overview

Control Panel lets you organize the active directory domains and perform advanced operations on them such as adding/removing organizational units (OU), users, groups and contacts across your entire On- premise and Hybrid AD environments.

You may add your active directory information which is later used when you are setting up enterprise hosting servers.

Control Panel Active Directory Manager empowers the Microsoft Directory user accounts to self-manage their accounts, hence reducing the load on Domain admins. Self-service features are delegated via access permissions. With self-service the user accounts can manage their profile such as setting their phone or mobile, email, profile picture, address, job title and secondary email etc. User accounts can also manage their password like changing their password and setting recovery options for password recovery in case of forgotten/stolen password.

Viewing Active Directory Domains

To view active directory domains available in the system navigate to the following path:

The list of active directory domains displays following:

1. **Domain FQDN:** This is the primary domain FQDN.
2. **Domain NetBIOS name:** The domain NetBIOS name is the NetBIOS name of the domain controller.
3. **Org Units:** It shows the number of organizational unit on that Domain controller.
4. **Users:** It shows the number of users on that Domain controller.
5. **Edit:** Click on this link to edit active directory domain properties.
6. **Remove:** Click to remove active directory domain. You cannot remove if there are active servers with active subscriptions.

Active Directory Domain

A domain controller is the server running Active Directory; Domain controllers are typically referred as DC.

A Domain controller authenticates the users and the computers to join the domain. You can have many Domain controllers in your AD for many reasons, like redundancy and load balance as users can use anyone of them as they are replicating AD database.

Add Active Directory Domain

To add a new active directory domain navigate to the following path:

Navigation: Home » Service Director » Active Directory » Domains

Click on **Add new Domain** button. A new screen will display following:

1. **Domain FQDN:** Enter the active directory domain name, example Fabrikam.com.
2. **Domain NETBIOS Name:** Enter domain controller's NetBIOS name, such as Fabrikam.
3. **Domain Administrator Login:** Provide here the login for the domain administrator account. It is recommended that you setup a special domain administrator account to use with Control Panel. When setting up domain administrator account, following points must be noted:
    a. Do NOT Use default Administrator account. Create a new Domain Administrator such as 'Administrator2' and set here. If you use default administrator account this may result in problems later on when you modify password of the account. You will need to change the password in the control panel as well and sync with all remote servers again, otherwise you will loose connectivity with the remote servers.
    b. Make the domain administrator;administrator2 member of **Domain Admins, Enterprise Admins, Exchange Servers, Exchange Organization Administrators, Group Policy Creator Owners, Schema Admins, Exchange Trusted Sub-System group for Exchange 2010/2013/2016/2019** and **local Administrators** groups.
4. **LDAP URL:** Please add an LDAP URL here for the OU you want to sync/create Organizations.
5. **Enter comma separated IPs of Remote Server(s):** Provide IP's of all the active directories.
6. **Generate random GUID for OU name in Active Directory:** If enabled, OU name, Address Lists name, Address book policy name will be created using a random GUID like 3B844AA8-38B4-4ABD-B8CB-41ACC34BB1C2. Applies to Exchange 2010 SP2, 2013 or later, Skype for Business or later, CRM 2011 or later, SharePoint 2010 or later.
7. **Append UPN suffix in User Logon Name:** Select to append.

User Account Options

You can set password policy for each domain, select one of the option below:

a. User must change password at next logon
b. User cannot change password
c. Password never expires

Nested OU Structure

You can also place sub-OUs within an OU in a process called nesting to create a hierarchical structure.

1. **Enable Nested OU Structure:** Select this checkbox to enable nested structure of AD.
2. **Create Reseller OU:** Select this checkbox to enable for resellers.
3. **Sub OU name for Users:** Provide Sub OU name for Users.
4. **Sub OU name for Contacts:** Provide Sub OU name for Contacts.
5. **Sub OU name for Distribution Groups:** Provide Sub OU name for Distribution Groups.
6. **Sub OU name for VMs:** Provide Sub OU name for VMs.

Note: Do not enable this setting for Hosted Exchange 2010.

Active Directory Organizations

Active Directory Organizations are organizations created by Control Panel on the selected active directory domain. Control Panel gives the provider option to create organization unit and users under that organization unit without having to subscribe to any service. Later, when the organization requests for any service, provider can enable services on the existing organizations.

To view Organizations navigate to the following path:

To search an active directory organization:

1. **Active Directory Domain:** Enter active directory domain.
2. **Organization Name:** Enter organization name.
3. **Customer ID:** It is the customer id.
4. **Customer Name:** It is the name of the customer.

Then, click **Search** button.

You can Add Active Directory Units. You can also **Enable/Disable ADsync, Sync from backend** and **Delete** organizations in Bulk. It displays the following listing:

1. **Organization Name:** It is the name of the organization.
2. **Users:** It displays the number of users in organization.
3. **Active Directory Domain:** It is active directory domain name under which this organization exists.
4. **Customer:** It is name of the customer who owns the organization.
5. **Subscriptions:** It shows the subscription to which the organization has been subscribed. Icon for each subscription displays that either the service is activated or it is deactivated.
6. **Options:** You can **Manage** active Directory Organizations:
    i. **Edit:** You can Edit Active directory Organization Unit.
    ii. **Add User:** Add an active directory user an enable services like Exchange, Skype for Business etc.
    iii. **Add Bulk Users:** Add bulk ad users.
    iv. **Update Bulk Users:** Update Password in bulk for AD users.
    v. **Enable/Disable ADSync:** Enable or disable ADSync for an organization.
    vi. **Sync from Backend:** This option will sync active directory organizations, users and security groups from backend active directory server.
    vii. **Security Group:** Add security groups fro an active directory organization.
    viii. **Remove:** You can remove an organization if there is no active service like Exchange.
    ix. **Settings:** Provide default AD user password settings.
    x. **Export Locked/Expired Users:** You can export users which are locked or expired.

Add Active Directory Organization Unit

Organizational Unit (OU) is a container in Active Directory domain that can contain different objects from the same AD domain: other containers, groups, user and computer accounts. To add a OU in Active Directory from panel navigate to the following path:
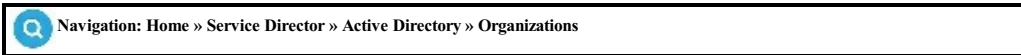
Click **Add Active Directory Organization** to add new Active directory organization. It displays the following listing:

1. **Active Directory:** Select active directory from the drop down list.
2. **Parent OU LDAP:** LDAP will be displayed where the new OU will be created.
3. **Customer:** Select name of the customer who will own the OU.
4. **Organization Name:** Enter organization name or OU.
5. **Domain Name:** This must be a valid registered and active domain.
6. **Address:** Provide address
7. **City:** Provide city
8. **State:** Provide state
9. **Zip/Postal code:** Provide zip.
10. **Country:** Select country
11. **Description:** Provide description for the active directory organization.
12. **Enable Adsync:** Select this option if you wan to enable Adsync on the organization.

Click **Save** when done.

Logon Hours Template

Logon hours are hours that the user is allowed to logon to the domain.

Specify the time/hours during which you wish to allow/restrict access to users, select the appropriate domain, specify the users to whom you wish to apply this logon hours permission and apply the changes.

To add a Logon Hour template navigate to the following path:

🔍 **Navigation:Home » Service Director » Active Directory » Organizations**

Select **Logon Hour Template** tab. You can search existing Logon hours templates, Add new Template etc..

It show following Listing:

1. **Template Id:** It shows the id of template
2. **Template Name:** It shows the template name.
3. **Time zone:** It displays the time zone
4. **Owner:** It display the owner of template.
5. **Assigned To Users:** It shows the number of Users assigned.
6. **Options:** You Can Edit, Clone and Remove the template.

Add New template

Click **Add New Template** to add a new logon hour template.

1. **Template Name:** Provide template name.
2. **Time zone:** Select your time zone.
3. **Logon Hours:** Select Logon hours. Sunday from 12:00 AM to 1:00 AM
4. **Available to Resellers:** Select Resellers
5. **Available to Customers:** Select Customers.

Click **Save** when done.

Security Groups

Security groups can provide an efficient way to assign access to users. User rights are assigned to a security group to determine what members of that group can do within the scope of a domain.

To add a new security group for an organization navigate to the following path:

Navigation: Home » Service Director » Active Directory » Organizations

Now place cursor in **Options** column in front of the organization for which you want to create a security groups and click **Security Groups**.

It show following in the listing:

1. **Display name:** It shows the display name.
2. **Group Scope:** It shows scope of group.
3. **Options:** You can **remove** the SG.

Add Security Groups

Click **Add Security Groups** to add a new Security Group

1. **Display name:** Provide display name.
2. **Group Scope:** It shows following option: Domain Local, Global, Universal
3. **Group Members:** Select users
4. **Automatically add users in group:** Select checkbox to automatically add users in this security group.

Click **Save** when done.

Enable/Disable ADSync

To enable/disable ADSync for an organization navigate to the following path:
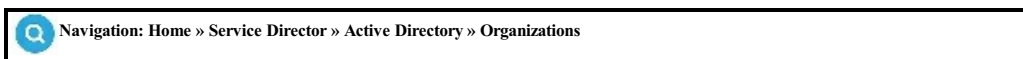
Now place cursor in **Options** column in front of the organization for which you want to create a security groups and click **Enable/Disable ADSync.**
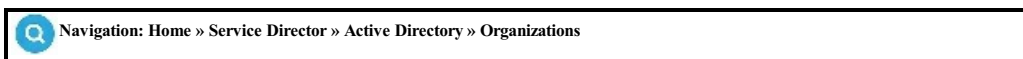
In Active Directory Organizations if you **Enable ADSync** on any organization, a pop-up shown will appear to select ADSync Template.

Apply To: Select Organization to which you want to apply the Template.

Click on **Save** button when done.

Default Settings (AD Password policy)

To add & manage Active Directory password policies navigate to the following path:

Now place cursor in **options** column in front of the organization for which you want to create a password policy and click **Settings**.

Under **Defaults** tab you can configure default settings for password policies:

AD User Password

Options: You can select one of the option below:

   a. User must change password at next logon
   b. User cannot change password
   c. Password never expires
   d. Send Email alert for password expiry to users

Password Policy

   - **Select Policy:** Select password policy from the dropdown list.

Logon Hours Template

   - **Select Template:** Select logon hours template from dropdown list.

Other configuration

   1. **Update Profile Allowed:** Checkbox
   2. **Change Password Allowed:** Checkbox
   3. **Unlock Account Allowed:** Checkbox
   4. **Allow to manage user Certificates:** Checkbox

Click **Save** when done.

Password Policies

Password policies are a set of rules which were created to increase security by encouraging users to create reliable, secure passwords and utilize them properly.

To add a new password policy for an organization navigate to the following path:

Navigation: Home » Service Director » Active Directory » Organizations

Now place cursor in **options** column in front of the organization for which you want to create a password policy and click **Settings**.

Under **Settings** tab now click **Password Polices** tab.

Add Policy

Now click **Add Policy** to create a new policy.

1. **Name:** Provide name of the password policy.
2. **Description:** Provide description.
3. **Precedence:** Provide precedence.
4. **Enforce Minimum Password Length:** Select checkbox to enforce minimum password length.
    - **Minimum Password Length (characters):** Provide number for e.g. 7
5. **Enforce Password History:** Select checkbox to enforce password policy.
    - **Number of Passwords Remembered:** Provide number for e.g 24.
6. **Password Must Meet Complexity Requirements:** Select checkbox to must meet password complexity.
7. **Store Password Using Reversible Encryption:** Select checkbox to store password using Reversible Encryption.
8. **Protected From Accidental Deletion:** Select checkbox to protect from accidental deletion.
9. **Enforce Minimum Password Age:** Checkbox to enforce minimum password age.
    - **User Cannot Change the Password Within (days):** Provide number of days.
10. **Enforce Maximum Password Age:** Check box to enforce maximum password age.
    - **User Must Change the Password After (days):** Provide number of days
11. **Enforce Account Lockout Policy:** Check box to enforce account lockout policy.
    - **Number of Failed Logon Attempts Allowed:** Provide number of attempts for e.g. 5.
12. **Reset Failed Logon Attempts Count After (mins):** Provide minutes to reset failed logon attempts.
13. **Account Will Be Locked Out for Duration of (mins):** Provide minutes to locked out duration time
14. **Applies To:** Select Users.

Click **Save** when done.

Enrollment

To add enrollment option for AD password policies navigate to the following path:

Now place cursor in **options** column in front of the organization for which you want to create a password policy and click **Settings**.

Under **Settings** tab now click **Enrollment** tab

Enrollment Options:

Allowed methods for user verification for password recovery and unlock account.

1. **Email:** Check email option
2. **Security Questions:** Check Security question option and select number of questions to be asked 1,2 or 3.

Click **Save** when done.

Viewing Active Directory Users

To view users navigate to the following path:

To search **Users**, provide search fields as per require for e.g. Select Owner, select Active Directory domain, organization name, display name, UPN etc.

Then click on **Search** button.
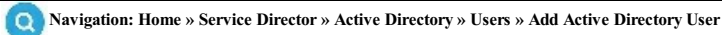
It displays the following listings:

1. **Status:** It shows the display name.
2. **User:** It shows the logon name.
3. **Details:** It shows the details of user as below:
   a. **Logon Name:** It shows logon name.
   b. **Organization Name:** It displays Organization name.
   c. **Active Directory Domain:** It is active directory domain name.
   d. **Customer:** It is name of the customer.
   e. **Logon Hours Template:** It shows if logon hour template is assigned.
4. **Subscriptions:** It shows the subscriptions for e.g. Ex, Skype4B, CRM.
5. **Options:** It shows following option for AD user
   i. Edit
   ii. Clone
   iii. Change Password
   iv. Unlock
   v. Disable
   vi. Remove

Add Active Directory User

In control panel an "Active Directory User" is an object that consists of all the information that defines a domain user, which includes user name, password, and groups in which the user account has membership.

To add a new user navigate to the following path:

To add a new user click on **Add User** button. It displays the following listing:

1. **Customer:** Select customer from the drop down list.
2. **Organization Unit:** Customer's organization unit will automatically be displayed.
3. **First Name:** Enter first name of the user
4. **Last Name:** Enter last name of the user.
5. **User Display Name:** Enter user display name.
6. **User Principal Name:** Enter user principal name.
7. **Email:** Enter email of the user.
8. **Password:** Enter password.
9. **Confirm password:** Retype password.
10. **Send Email:** Select checkbox.
11. **Send email to:** Provide email address.

Optional Settings

Click to expand the *Optional Settings*.

You can provide the AD user profile information such as Firstname, Lastname , Profile picture, Logon Hours etc.

You can also specify the Mailbox GUID for cross forest migration under optional settings. See more on [Mailbox Migration](#)

1. Mailbox GUID for migration
2. Mailbox Archive Guid
3. Mailbox Archive Name
4. Mailbox Recipient Type Details
5. Mailbox Culture
6. Proxy Addresses

Password Settings

Click to expand the *Password setting*: You can set password policy for each domain, select one of the option below:

a. User must change password at next logon
b. User cannot change password
c. Password never expires
d. Send Email alert for password expiry to users

Group Membership

Click to expand the ***Group member ship.*** Select Groups for member ship.

Enable Service For e.g. Exchange

Click to expand the ***Enable Exchange Service.***

1. **Primary email:** Provide primary email address.
2. **Mailbox type:** Select the type of mailbox: User, Linked, Shared, Room, Equipment etc.
3. **Full Access (Auto-Mapping Enabled):** Assign permissions to mailboxes on this user.
4. **Full Access (Auto-Mapping Disabled):** Assign permissions to mailboxes on this user.
5. **Send On Behalf:** Assign permissions to mailboxes on this user.
6. **Send As:** Assign permissions to mailboxes on this user.

7. **Mailbox database:** Select exchange database.
8. **Mailbox Size (in MB):** You can either select Unlimited or Custom. In case of "Custom" provide below storage limits:
    i. **Issue warning at (MB):** Provide MB's to issue warning.
    ii. **Prohibit send at (MB):** Provide MB's to prohibit send at.
    iii. **Prohibit send and receive at (MB):** Provide MB's to prohibit send and receive at.
9. **Language:** Select locale of mailbox.
10. **Time zone:** Select time zone.
11. **Alternate email:** Provide alternate email for AD user self-service to reset passwords / forgotten password.
12. **Hide from Exchange Address Lists:** Select hide.

Click **Save** when done.

Add Bulk Users

Creating and managing user accounts in control panel Active Directory is a challenging task that all administrators face in their day-to-day activities. Bulk Active Directory user allows you to create multiple user provisioning templates that contain the standard user attribute values, which can be used in creating bulk users.

To add bulk Active Directory users navigate to the following path:

Navigation: Home » Service Director » Active Directory » Organizations

Now place cursor in **Options** column in front of the organization for which you want to create bulk active directory users and click **Add Bulk Users**.

1. **Select Customer:** Select customer from the dropdown list.
2. **Organization Unit:** Select organization unit
3. **Select user to clone:** Select users to clone.
4. **CSV file to import:** Browse and select CSV file to import.

Select **Save**.

Update Bulk Users

To update bulk Active Directory users navigate to the following path:

Click **Update Bulk User** button to update bulk users.

1. **Organization Unit:** Select Organization unit
2. **Select user to clone:** Check box to clone users
3. **CSV file to import:** Select CSV file.
4. **Send password email to alternate email if password being updated:** Checkbox
5. **Retain existing attribute values for empty field in CSV:** Checkbox.

Click **Save** when done.

Active Directory Plan Management

Active Directory plans are created through powerful Service Plan Wizard. It includes following:

1. [Reseller Product Listing](#)
2. [Customer Product Listing](#)
3. Add-ons Management

To create an active directory plan navigate to following path:

> 🔍 **Navigation: Home » Service Plans » Active Directory**

Note: You can also edit existing hosted email plans by clicking on the **Edit** link.

Click **Add New Product** button. When the page loads, you will see the following settings.

1. **Product Type:** Select **Active directory** from the drop-down list.
2. **Product Name:** Enter the name of your product.
3. **Active Directory:** Select Active directory Domain.
4. **Is Active:** Select No if you want to disable this product selling.
5. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
6. **Associate Add-on:** You may want to associate add-on with this product. Your choices are:
   a. Optional
   b. Required
   c. Suppressed
7. **Associate Domain:** Select how you want to associate domains with this product. Your choices are:
   o Required
8. **Sync sold plan resources:** Check this option in order to Sync resources to sold existing subscriptions associated with the package. **Note:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings. Skype4B plan or add-on is not updated if it is assigned to user already.
9. **Enabled For Commission Reseller(s):** If you check this option the Customer Product Plan will be enabled for Commission type Resellers. (Visible only if Commission Type Reseller option is enabled in Built-in Module.)
   i. All Resellers
   ii. Select Resellers
10. **Product Comments:** Enter any comments you want to associate with this product. These comments show up on the store-front when this product is selected.

Once you click the **Next** button you will be present with series of forms to configure your product.

Resources: In step-2 you will set the no of users for the plan.

Payment Cycles: This form lets you select Payment Cycles for the plan. You must select at least one payment cycle and payment group.

Select the payment cycle and click right arrow button to move it to **Selected Cycles** list.

Select the payment group and click right arrow button to move it to **Selected Payment Groups** list.

Price Group: This form lets you set prices for the Payment Cycles and Payment Groups you have selected in the previous step. Here you may set:

a. Setup Price
b. Price
c. Discount

Enter prices in each box.

Possible Product Upgrade / Downgrade: Here you can configure the upgrade and downgrade behavior of this product. When a product is purchased, your client may perform upgrade/downgrade from their control center without

your involvement.

Associate Add-on: This form lets you associate add-on with your hosting plan. Your client may buy these add-on using online store or order them through their customer control center.

Click **Finish** button to complete product setup.

Add ADSync Template

To add a new ADSync template navigate to the following path:

With each listed Template there are options for **Set as default**, **Edit** and **Remove**.

To add a new template click on **Add ADSync Template** button. It displays the following listing:

1. **Template Name:** Enter Template name.
2. **Description:** Enter description.
3. **Set As Default Template:** Select this option to set it default.
4. **Select attribute to Sync:** There are following attributes that can be synced, Description, Display name, First Name, Last Name, Email, Initials, Middle Name, UPN, Direct Manager, Home phone, Mobile phone, Business phone, Pager Home, Page Fax, Address City, Country, State, Zip code, Company, Job title, Department, Office Location, Password, Notes, Proxy, Addresses
5. **Apply To:** Select Organization to which you want to apply the Template.

Click on **Save** button when done.

ADSync Usage Report

AdSync Usage report delivers to provider valuable information about Organizations and users that are synced using Adsync.

To view ADSync Usage Report, navigate to the following path:

Under **AdSync Organization Report** tab, You can **Export to Excel** the organization Usage Report. It displays the following listing:

1. **Company Name:** It shows the name of company.
2. **Organization Name:** It shows the name of organization.
3. **Customer Name:** It shows the customer name with id.
4. **Owner:** It shows the owner name.
5. **Users synchronized:** It shows the total number of users synchronized.
6. **Users not synchronized:** It shows the number of users not synchronized.
7. **Total Users:** It shows total number of user in an organization.

Under **Users Synchronized** tab, You can **Export to Excel** the user sync report. It displays following listing:

1. **Company Name:** It shows the name of company.
2. **Organization Name:** It shows the name of organization.
3. **Customer Name:** It shows the customer name with id.
4. **Owner:** It shows the owner name.
5. **User Display Name:** It shows the user display name.
6. **User Principal Name:** It shows UPN.
7. **Last Synced:** It shows last synced date/time.

Active Directory Usage Report

Active Directory Usage report delivers to provider valuable information about Organizations, users and security groups that are being used by customers in Control Panel.

To view AD Usage Report, navigate to the following path:

Navigation: Home » Service Director » Active Directory » Usage Report

There are three tabs:

1. Organization Usage Report
2. User Usage Report
3. Security Group Usage Report

You can **Export to Excel** all the Usage Report.

Data Centers Overview

Data Centers section is the information repository which the provider may wish to build to save information about the servers, their racks and switches. There is no provisioning involved as far as Data Centers section is concerned and all information maintained here serves just the purpose of providing information about the server with respect to its data center, rack and switches.

To view, add, edit and remove data centers information navigate to following path:

Navigation: Home » Service Director » Data Centers

Click on the **Data Center** name you can view all the details. To edit a Data Center click on **Edit** .

You can create **Racks** and **Switches** on your Data Centers.

View Data Centers

For viewing data centers information navigate to following path:

> 🔍 **Navigation: Home » Service Director » Data Centers**
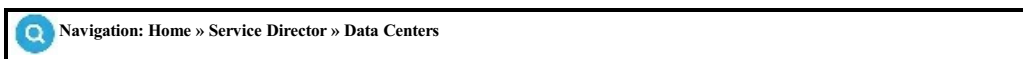
Following fields are shown:

1. **Data Center ID:** Displays data center ID.
2. **Name:** Shows the name of data center.
3. **Location:** Specifies placement/locale of data center.

You can Search Data Centers using **Data center ID** or **Name**.

You can **add**, **edit** or **remove** data centers by clicking on corresponding controls.

Edit Data Center Information

> 🔍 **Navigation: Home » Service Director » Data Centers » Edit Data Centers**
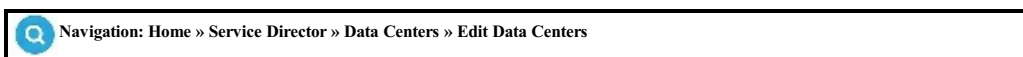
It shows the following listing:

1. **Data center name:** Edit the name of data center. For e.g. Verio.NET
2. **Address1:** Edit the address of the data center.
3. **City:** Edit the city.
4. **State:** Edit the name of the state for e.g. USA
5. **Zip:** Edit the zip code for e.g. 456435
6. **Country:** Edit the name of the country for e.g. United States
7. **Phone 1:** Edit Phone number.
8. **Phone 2:** Edit phone number.
9. **Primary email:** Edit Email address. sales@verio.net
10. **Alternate email:** Edit the alternate email.
11. **Website:** Edit the name of the website for e.g. verio.net

Then click on **Save** button.

Data Center Management

To add a new data centers you have to navigate to the following path:
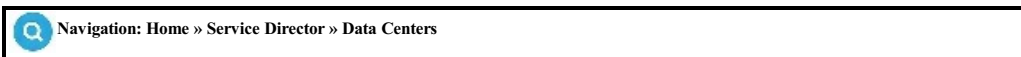
Data centers can be modified or deleted by clicking on **edit** or **remove** respectively.

Click on **Add Data Center** button to include a new data center

Add New Data Center

1. **Data center name:** Enter the name for the data center. For e.g. Verio.NET
2. **Address1:** Enter the address of the data center for e.g. 4950 Communication Ave. Suite 110
3. **City:** Enter the name of the city.
4. **State:** Enter the name of the state for e.g. USA
5. **Zip:** Enter the zip code for e.g. 456435
6. **Country:** Enter the name of the country for e.g. United States
7. **Phone 1:** Enter phone number e.g. 111-111-111
8. **Phone 2:** Enter phone number 2.
9. **Primary email:** Enter primary email for e.g. sales@verio.net
10. **Alternate email:** Enter alternate email.
11. **Website:** Enter the name of the website for e.g. verio.net

Complete necessary details and click on **Save** button to continue.

View Racks

For viewing racks information navigate to following path:

Following fields are shown:

1. **Rack ID:** Displays rack ID.
2. **Identification:** Normally used for name of rack for easy identification.
3. **Capacity:** Capability to handle units.
4. **Data Center:** Specifies designated data center.

You can **add**, **edit** or **remove** Racks by clicking on corresponding controls.

Racks Management

To add a new rack navigate to following path:
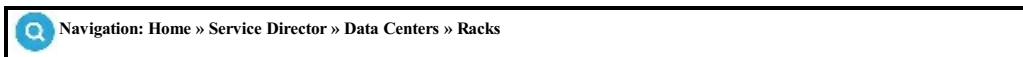
Racks can be modified or deleted by clicking on **edit** or **remove** respectively.

Click on **Add New Rack** button to include a new rack.

Following fields are shown:

1. **Identification:** Normally used for name of rack for easy identification.
2. **Capacity:** Capability to handle units.
3. **Data Center:** Specifies designated data center.

Complete necessary details and click on **Save** button to continue.

View Switches

For viewing switches information navigate to following path:

Following fields are shown:

1. **Switch ID:** Displays switch ID.
2. **Identification:** Normally used for name of switch for easy identification.
3. **Port:** Associated port number.
4. **Data Center:** Specifies designated data center.

You can **Add**, **Edit** or **Remove** Switches by clicking on corresponding controls.

Switches Management

To add a new switch navigate to following path:

Switches can be modified or deleted by clicking on **edit** or **remove** respectively.

Click on **Add Switch** button to include a new data center **Switches**

Following fields are shown:

1. **Identification:** Normally used for name of switch for easy identification.
2. **Port:** Associated port number.
3. **Select Rack:** Specifies designated rack.
4. **Brand:** Specify manufacturer or brand name.
5. **Model:** Enter model name or number.

Complete necessary details and click on **Save** button to continue.

Orchestration Module for Web Hosting

Traditional Hosting/Web Hosting is yet another powerful product which enables you to offer shared web and data hosting service to resellers and end customers.

It brings you necessary tools and controls to run a comprehensive web hosting business.

Control Panel supports for Hosting Panel

1. Hostmatic Control Server
2. Plesk

Control Panel is fully scalable and reliable hosting control panel that comes with service provisioning, management, billing, helpdesk, monitoring and reporting tools. Additionally, self-serviced cutting-edge control panels for providers, resellers and end users make it even easier to manage web hosting service.

Control Panel Cloud Enabled Web Hosting Automation Solution lets you start with minimal number of servers and expand as your grow without extra cost or investment on the control panel system.

Overview

With Control Panel you create Server Groups and assign a hosting provider to it. Each server group can have only 1 hosting provider assigned to it whereas it can have unlimited number of Server Group Members. With the use of several properties, you can configure Control Panel to provision hosting services via assigned provider in a load balanced manner.

Example:

1. Create a server group called **Shared Hosting Server Group**.
2. Assign **Hostmatic Control Server** as provider.
3. Assign server group member(s) to this Server Group. Group members are actual servers where components like IIS, FTP, DNS, Email Server, Web Stats and Databases are installed and to be used for shared hosting provisioning.
4. Create a shared hosting plan (Hosting Product) from **Home » Service Plans » Hosting Products**
5. Name it "**Premium Hosting Plan**" and assign *Shared Hosting Server Group* to this package.

Now, when you sell **Premium Hosting Plan** for shared hosting, Control Panel will automatically provision the hosting service on the group member(s).

Configuring Hostmatic

To view available hosting panel providers, navigate to the following path:

> 🔍 **Navigation: Home » System Configuration » Providers » Hosting Panels**

Hostmatic is a powerful Panel extension which extends its functionality to support **web & data hosting** provisioning on **large server farms** in a **load-balanced manner**. Using Panel's Control Center these services can be managed online. For this, you must complete following two steps.

Step 1: Create Server Group:

In order to have Hostmatic working, you need to have at least 1 server group with Hostmatic selected as its hosting panel provider.

1. To learn about Server Groups, see [Server Groups Management](#).
2. To learn how to Add a Server Group, see [Add Server Group](#).

<u>**IMPORTANT:**</u> Create a user "**Panel_Prov_Admin**" on each Panel controlled Remote Server and make it member of **ADMINISTRATORS** group. Later use **ONLY** this user when adding Hostmatic server to server group.

Step 2: Add Service Roles to Servers

You can assign multiple service roles to several servers or you may assign multiple service roles to a single server as appropriate.
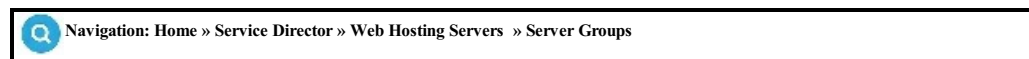
For assigning role to a server navigate to:

> 🔍 **Navigation: Home » Service Director » Web Hosting » Server Groups**

Click on the particular server and click **Add Service** button. You may select from [available services](#) (DNS, Mail, Web etc.) and that will be assigned to the server.

Viewing Server Groups

To view hosting server groups navigate to the following path:

The list of server groups displays following:

1. **Enabled:** Tick means Yes.
2. **Server Group Name:** Friendly name.
3. **Provider:** Indicates the provider for this server group.
4. **Edit:** Click on this link to edit server group properties. Do not edit the server group if it is already in use in any service plan.
5. **Remove:** Click to remove server group. You cannot remove a server group if there are active servers with active subscriptions.

Viewing Server Group Members

To view hosting server group members navigate to the following path:

Click on the **Server Group Name** a new tab **Web Hosting Servers** will open.The list of server group members displays following:

1. **Server group:** This displays the name of server group you are under.
2. **Provider:** Displays the provider selected for this server group.
3. **Server Name:** Friendly name of the server.
4. **Services:** Displays status of services. You see icons for different services. Greyed out icon means that service is not active and colored icon for a service means that the service is active. Hover the icons to see name of the service configured.
5. **Options:** Following links are available to perform actions on a server member:
    a. **Services:** Click on this link to add services under the server.
    b. **Edit:** Click on this link to edit server properties.
    c. **Disable:** Click on this link to disable hosting accounts provisioning on the server. You may want to do this if server is down or it is full.
    d. **Remove:** Click to remove server from group. You cannot remove a server if there are active subscriptions on it.

Add Server Group

To add a server group navigate to the following path:
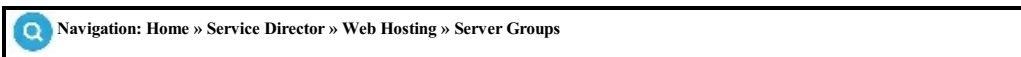
And then click on **Add Server Group** button you will land to the following path:

Fill in the following fields for server group to be added:

1. **Server Group Name:** Enter the name of the server group. This is friendly name.
2. Provider: Select Provider
    a. Hostmatic
    b. Plesk
3. **Fill Style:** Select from
    i. **Least Filled First:** In case there are multiple servers with same service under the server group, one that has lower number of services provisioned will be used for new provisioning.
    ii. **One-By-One:** In case there are multiple servers with same service under the server group, new service will be provisioned one by one on the servers regardless of the number of existing service provisioned.
4. **Enabled:** Tick means Yes.

Click on **Next** button.

Case a: Hostmatic Control Server

In **Step 2,** you will enter server information where actual provisioning will be done. If you select **Hostmatic** as provider, following fields will be displayed which you need to fill in:

1. **Reference Id:** Enter your reference id. This is friendly name for server.
2. **Datacenter:** Select name of the datacenter e.g. Verio.NET
3. **Rack:** Select rack name.
4. **Switch:** Select switch name.
5. **Server IP:** Enter server IP address where you want the services to be provisioned. Services will need to be configured once this step of adding the server is completed.
6. **Administrator login:** Enter login. Usually default server admin user **Administrator** is used as it has all the rights to deploy services successfully.
7. **Administrator password:** Enter password of the server admin.
8. **Confirm administrator password:** Retype password.

Click on **Finish** button when done.

Case b: Plesk Server

In **Step 2,** you will enter server information where actual provisioning will be done. If you select **Plesk** as Provider, following fields will be displayed which you need to fill in:

1. **Plesk Server Name:** Enter plesk server name.
2. **Plesk Base URL:** Enter plesk base URL. for e.g. /enterprise/control/agent.php
3. **Plesk Login:** Enter login name
4. **Plesk Password:** Enter password.
5. **Confirm Password:** Confirm password.
6. **Plesk Shared IP Address:** Enter please shared IP address.
7. **Maximum websites load:** Enter maximum number of website load.
8. **Current website load:** It shows current website load.

Click on **Finish** button when done.

Server Group Management

To manage a hosting server group navigate to the following path:

Click **Edit** in front of an existing Server Group to manage.

Fill in the following fields for server group to be added:

1. **Server Group Name:** Enter the name of the server group. This is friendly name.
2. Provider: Select Provider
   a. Hostmatic
   b. Plesk
3. **Fill Style:** Select from
   i. **Least Filled First:** In case there are multiple servers with same service under the server group, one that has lower number of services provisioned will be used for new provisioning.
   ii. **One-By-One:** In case there are multiple servers with same service under the server group, new service will be provisioned one by one on the servers regardless of the number of existing service provisioned.
4. **Enabled:** Tick means Yes.

Click on **Next** button.

Case a: Hostmatic Control Server

In **Step 2,** you will enter server information where actual provisioning will be done. If you select **Hostmatic** as provider, following fields will be displayed which you need to fill in:

1. **Reference Id:** Enter your reference id. This is friendly name for server.
2. **DataCenter:** Select name of the datacenter e.g. Verio.NET
3. **Rack:** Select rack name.
4. **Switch:** Select switch name.
5. **Server IP:** Enter server IP address where you want the services to be provisioned. Services will need to be configured once this step of adding the server is completed.
6. **Administrator login:** Enter login. Usually default server admin user **Administrator** is used as it has all the rights to deploy services successfully.
7. **Administrator password:** Enter password of the server admin.
8. **Confirm administrator password:** Retype password.

Click on **Finish** button when done.

Case b: Plesk Server

In **Step 2,** you will enter server information where actual provisioning will be done. If you select **Plesk** as Provider, following fields will be displayed which you need to fill in:

1. **Plesk Server Name:** Enter plesk server name.
2. **Plesk Base URL:** Enter plesk base URL. for e.g. /enterprise/control/agent.php
3. **Plesk Login:** Enter login name
4. **Plesk Password:** Enter password.
5. **Confirm Password:** Confirm password.
6. **Plesk Shared IP Address:** Enter please shared IP address.
7. **Maximum websites load:** Enter maximum number of website load.
8. **Current website load:** It shows current website load.

Click on **Finish** button when done.

Server Group Member Management

Group Member is hosting server assigned to server group. To add a hosting server as group member, navigate to the following path:

Click on the name of existing Server Group. A new tab "**Web Hosting Servers**" will open and you will see list of server(s).

You can add new servers by clicking on **Add Server to Group** button. You can manage existing servers by clicking on **Edit** link. You can **Disable** and **Remove** server from the listing. You can add services to by clicking on **Add Service** button.

Case a: Hostmatic Control Server

In **Step 2,** you will enter server information where actual provisioning will be done. If you select **Hostmatic** as provider, following fields will be displayed which you need to fill in:

1. **Reference Id:** Enter your reference id. This is friendly name for server.
2. **DataCenter:** Select name of the datacenter e.g. Verio.NET
3. **Rack:** Select rack name.
4. **Switch:** Select switch name.
5. **Server IP:** Enter server IP address where you want the services to be provisioned. Services will need to be configured once this step of adding the server is completed.
6. **Administrator login:** Enter login. Usually default server admin user **Administrator** is used as it has all the rights to deploy services successfully.
7. **Administrator password:** Enter password of the server admin.
8. **Confirm administrator password:** Retype password.

Click on **Finish** button when done.

Case b: Plesk Server

In **Step 2,** you will enter server information where actual provisioning will be done. If you select **Plesk** as Provider, following fields will be displayed which you need to fill in:

1. **Plesk Server Name:** Enter plesk server name.
2. **Plesk Base URL:** Enter plesk base URL. for e.g. /enterprise/control/agent.php
3. **Plesk Login:** Enter login name
4. **Plesk Password:** Enter password.
5. **Confirm Password:** Confirm password.
6. **Plesk Shared IP Address:** Enter please shared IP address.
7. **Maximum websites load:** Enter maximum number of website load.
8. **Current website load:** It shows current website load.

Click on **Finish** button when done.

Add Services

To add services navigate to the following path:

Click on the name of existing Server Group. A new tab "**Web Hosting Servers**" will open and you will see list of server(s). Click on **Services,** this will open new tab called **Services**.

Click on **Add Service** button to add a service.

You can add following services and each service has various configurable options which you need to choose based on the setup you have on backend for each service.

Following is list of available services you can add:

Web	FTP	Mail	DNS	Databases	Web Stats
IIS 6	Microsoft FTP 6 Server	Mail Enable Server	Microsoft DNS Server	SQL Server 2005	SmarterStats
IIS 7	Gene6 FTP Server	Merak Mail Server 9.2.1	Simple DNS Plus Server	SQL Server 2008	
IIS 8	Filezilla FTP Server	Smarter Mail Server 6.x		MYSQL	
IIS 10	Microsoft FTP 7/7.5 Server (Windows 2008 or Windows 2012)	Smarter Mail Server 8.x		SQL Server 2012	
	Microsoft FTP 10 Server (Windows 2016)	SmarterMail 11.x/12.x/13.x		SQL Server 2014	
				SQL Server 2016	

Hosting Accounts

Hosting accounts section lets you view all the hosting accounts in the system under the provider's customers. To be able to view hosting accounts under the reseller, you will need to login as a reseller first and then navigate to same path to view the hosting accounts for customers under the respective reseller.

To view Hosting accounts navigate to the following path:

Navigation: Home » Service Director » Web Hosting » Accounts

Key benefit of this section is that it filters out all the hosting accounts on single interface and you can manage any of the hosting account by clicking on **Manage** against the desired domain name.

Click on the **Manage** for any account to show options to manipulate and manage corresponding hosting account.

The list displays the following:

1. **Subscription ID:** This is unique ID assigned to the subscriptions.
2. **Domain Name:** Specifies the name of corresponding domain.
3. **Node:** Specifies the node.
4. **Customer ID:** It displays the customer ID.
5. **Customer Name:** It displays the customer name.
6. **Company Name:** It displays the name of the company.
7. **Options:** Click on **Manage** to manage server service.

Hostmatic Overview

Click on the **Manage** for any account to show options to manipulate and manage corresponding hosting account.

To view Service Management for hosting accounts navigate to the following path:

Navigation: Home » Service Director » Web Hosting » Hosting Accounts

You will be on following navigation path after clicking on Manage:

Navigation: Home » Service Director » Web Hosting » Hosting Accounts » Manage

Service Management page shows various management options, each with a unique display icon that helps the user identify the feature easily.

Summary: This section highlights the domain name which you are managing. Its shows the Domain, its status i.e. **Running/Stopped**. IP address the website is running on. Bandwidth usage graph of the domain and the **Name servers** that are set for the domain.

Domain Management: This section allows you to manage following aspects related to domain:

Turn On/Off	Lets you turn the domain On/Off.
Sub-Domains	Lets you add new sub domain and manage the existing ones.
Domain aliases	Lets you add new domain aliases or manage the existing ones.
Limits	Lets you manage quota limits for the domain.

Hosting Management: These are the detailed options available in Control Panel associated with traditional hosting or shared web hosting. Below is list of options you can manage under Hosting Management section:

| Website Settings	You can configure website settings related to permissions, authentication, application pool and performance.
Default Documents	Lets you manage default document in IIS for the domain being managed.
URL Redirection	Lets you set Redirection (physical redirection or http redirection) for the domain being managed.
Custom Errors	Lets you set custom errors for the domain being managed.
MIME Types	Lets you add MIME Types on the domain being managed.
Virtual Directory	Lets you create virtual directory under the domain being managed.
Scripting	Lets you activate/deactivate different scripting languages like ASP, ASP.Net, PHP, Python, Perl, Cold Fusion on the domain being managed.
FTP Users	Lets you add/remove FTP Users on the domain being managed.
Databases	Lets you add/remove/manage MSSQL and MYSQL databases and their users on the domain being managed.

ODBC DSN	Lets you manage ODBC DSN on the domain being managed.
File Manager	Lets you manage File Manager on the domain being managed.
Website Stats	Lets you view/manage Website Status on the domain being managed.
DNS	Lets you manage DNS on the domain being managed.
Shared SSL Links	Lets you manage SSL Links on the domain being managed.

Email Management: The Email Management section allows to manage Email accounts with shared hosting

Turn On/Off	Lets you turn the mail domain On/Off.
Mail Domain Alias	Lets you manage Mail Domain Aliases on the domain being managed.
Email Accounts	Lets you manage Email Accounts on the domain being managed.
Email Lists	Lets you create/remove email lists on the domain being managed.
Email Groups	Lets you add/remove email groups on the domain being managed.

General Settings

To view general account details navigate to the following path:

> 🔍 **Navigation: Home » Service Director**
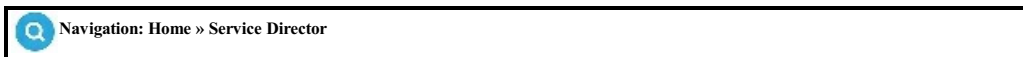
Select one of following service:

1. Web Hosting
2. Hosted Exchange
3. Hosted SharePoint
4. Hosted CRM
5. Hosted Skype for Business
6. Virtual Machines Hosting
7. Microsoft CSP
8. Windows Work Folders
9. RDS Hosting

Go to **Accounts**. Click on **Manage**. Under **General Settings** tab

You can see **Subscription Limits** showing the used and available resources for each service.

Also you can see Subscription ID, click on it. Once you click the **Subscription ID** you will be on following navigation path:
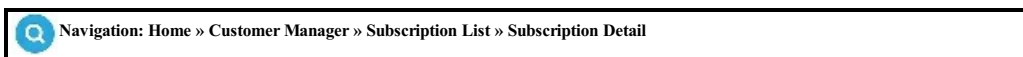
> 🔍 **Navigation: Home » Customer Manager » Subscription List » Subscription Detail**

You will be able to view details of the subscription you have clicked and perform various operations on subscription.

You will be presented different tabs to related to each service. See more on [Subscription Detail](#).

You can see **Customer name** and ID, Click on it. Once you click the Customer name you will be on following navigation path:

> 🔍 **Navigation: Home » Customer Manager » Customers » Customer Detail**
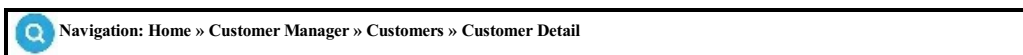
You will be able to view details of the customer you have clicked and perform various operations on customer.

You will be presented different tabs to related to each customer. See more on [Customer Detail](#).

Domains

Once you click the subscription name you will be on following navigation path.
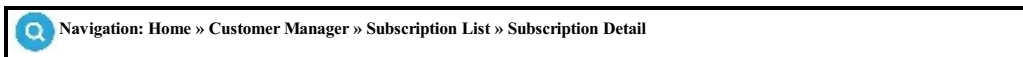
It shows the following fields:

1. **Domain Name:** It displays the domain name.
2. **IP Address:** It displays the IP address.
3. **Sub-Domains:** It shows the sub-domains.
4. **Allocated Disk:** It shows allocated disk space. (MB)
5. **Options:** In option you can Edit, Manage, Delete and Assigned dedicated IP.

Click on **Add New Domain** button to add a new domain to shared hosting.

1. **Domain Name:** Provide domain name.
2. **Disk Space allowed In:** Select space in GB.
3. **Activate mail service:** Check or uncheck it.
4. **Subscribe to:** Select from the drop down list Physical web hosting or URL forwarding.

Then click on **Save** button.

Mail Domain Alias

For listing the aliases of mail domain navigate to following path:
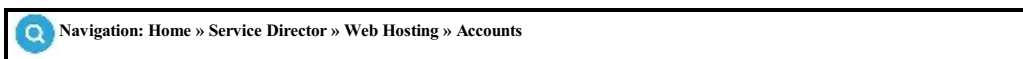
Click **Manage** in front of "Hosting account" or "Mail Only Subscriptions". It shows the following listing:

1. **Mail Domain Alias:** Displays the name of the mail domain.
2. **Options:** Remove discards the specific mail domain.

Click on **Add Mail Domain** button to add a new domain. Provide **Domain Alias Name** and click on **Save** button when done.

Manage DNS Zones

To manage DNS zones for DNS Only subscriptions navigate to the following path:

Select **DNS Only Subscriptions** tab. Click **Manage** in front of DNS Only Subscription.

Under **DNS Zones** tab, you can either **Create DNS Zone** or **Import DNS Zone.**

1. **Status:** It shows the status of the zone.
2. **Domain Name:** It shows the domain name.
3. **DNS Server:** It shows the DNS server.
4. **Customer Name:** It shows the customer name.
5. **Options:** Under options **Manage**, **Remove** and **Create Reverse Lookup** of your DNS zone.

Clicking **Manage** you can manage DNS Record, Add DNS Record and SOA Record

Domain Service Control

To view Domain Management section navigate to the following path:
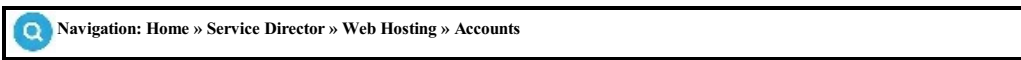
Click **Manage** in front of webhosting account. ***Domain Management*** section allows you to manage following aspects:

1. **Turn On/Off:** Lets you turn the domain On/Off in IIS.
2. **Sub-Domains:** Lets you add new sub domain and manage the existing ones.
3. **Domain aliases:** Lets you add new domain aliases or manage the existing ones.
4. **Limits:** Lets you manage quota limits for the domain.

Turn On/Off

You can stop or start/stop a site in IIS or Email Service using turn on/off feature by navigating to following path:
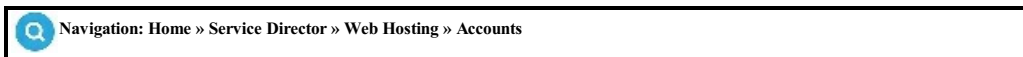
Click **Manage** in front of "Hosting account" or "Mail Only Subscriptions".

Here You can manage **Turn On/Off** for Domain and Email. It will display following if service is already running.

"Service is Running. Would you like to Stop it?

Click **Yes** or **No**.

Sub domains

A sub domain is a domain that is part of a main domain. For example, "mail.fabricam.com" and "sales.fabricam.com" are sub domains of the "fabricam.com" domain, which in turn is a sub domain of the "com" Top Level Domain (TLD).

Sub domains can be viewed, added or modified as per requirement by navigating to following path and clicking on **Sub Domains**:

> **Navigation: Home » Service Director » Web Hosting » Accounts**

Click **Manage** in front of webhosting account. Click on **Add Sub-domain** button to add a new sub domain.

1. **Sub-domain:** Provide sub domain.
2. **FTP Users:** Select FTP users from the drop down list or create new.
3. **FTP Login Name:** Provide FTP login name.
4. **FTP Password:** Provide password.
5. **Confirm password:** Retype password.

Click on **Save** button when done.

Domain Aliases

Domain name aliases are additional domain names associated with your primary domain and function with your current set of user accounts. This will help you access all e-mails addressed to domain aliases in your primary account.

Domain aliases can be viewed, added or modified as per requirement by navigating to following path and clicking on **Domain Aliases**:
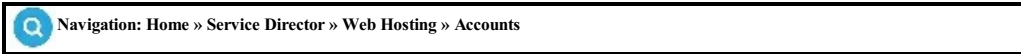
> **Navigation: Home » Service Director » Web Hosting » Accounts**

Click **Manage** in front of webhosting account. Click on **Add Domain Alias** button to include more sub domains. Provide domain alias name. Click **Save** for changes to take effect. It shows the following listing:

1. **Domain Alias Name:** It shows the name of the domain alias.
2. **Options:** You can remove the domain alias from options.

Limits

You may want to apply limitation on the resources such as bandwidth, maximum domains, user accounts, scripting support limitation etc. You can do so by navigating to:

Navigation: Home » Service Director » Web Hosting » Accounts

Click **Manage** in front of webhosting account. Various resources are enlisted that can be managed/modified by clicking on **Edit Resources** button.

Edit and adjust the resources as per your requirements and click **Save** button to finalize changes.

Website Settings

You can configure website settings related to permissions, authentication, application pool and performance at:

Click **Manage** in front of "Hosting account". Following options are available to be managed:

1. **Read:** Set read permissions in IIS.
2. **Write:** Set write permissions in IIS.
3. **Directory browsing:** Allow browsing of directory structure.
4. **Execute Permission:** Enable and allow execution of scripts/extensions.
5. **Disable IIS Logging (For Domain(s)):** Check this box to disable IIS logging.
6. **Allow anonymous access:** Allows anyone to visit the public areas of website.
7. **Enable Integrated Windows authentication:** Integrated Windows authentication does not initially prompt for a user name and password. The current Windows user information on the client is used for Integrated Windows authentication.
8. **Enable basic authentication:** Collects user name and password and send in an unencrypted form.
9. **Application Pool:** Name of the application pool that contains one or more applications run.
10. **Maximum CPU Usage:** Mention percentage for peak utilization of System CPU.
11. **Maximum Network Use (KB/S):** Enter network bandwidth usage.
12. **Connection limited to:** Specify connection limitation.

Click **Save** when done.

Default Documents

You can establish a default document for client requests to Web site that does not specify a document name. Default documents can be a directory's home page or an index page. You may add/extend support for default documents by simply navigating to:

Navigation: Home » Service Director » Web Hosting » Accounts

Click **Manage** in front of webhosting account. Click on the **Default Documents** to get to this option. Clicking on **Add New Document** will allow you to add up new default document that will now be supported. You can also delete an existing default document by clicking on **Delete** button.

Simply click on **Save** button for changes to take effect.

URL Redirection

You can make a web page available under a different URL by utilizing URL Redirection feature. Navigate to the following path:
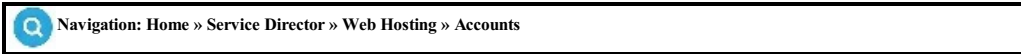
Click **Manage** in front of webhosting account. You may use one of the following options:

1. **Physical Directory Path:** Browse from physical directory path to set as redirected destination.
2. **Redirect requests to this destination:** Use this URL for redirection.

Changes will take effect on clicking the **Save** button.

Custom Errors

Use this feature to customize HTTP error messages that are sent to clients when Web server errors occur. You can view custom error messages by navigating to:
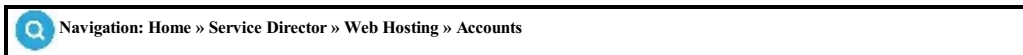
Click **Manage** in front of webhosting account. Click on the **Custom Errors** to get to this option. It displays the following listing:

1. **Http Error:** It displays the HTTP Error.
2. **Type:** It displays the type of response.
3. **Contents:** It displays the content.
4. **Default IIS Template:** It shows that the error is default or not.
5. **Operation:** You can edit and set to default.

Click on **Edit** to configure the currently selected custom error message.

1. **Status Code:** Provide status code.
2. **Prefix Language File Path:** Provide language file path.
3. **Path:** Provide path.
4. **Response mode:** Select preferred response mode.
    i. Absolute path
    ii. Executable path
    iii. URL

Click on **Save** button to save changes. Clicking on **Set to Default** will load the default template.

MIME Types

With Multipurpose Internet Mail Extensions (MIME), you can create file formats that will be used during e-mail exchange.

Navigate to following path for listing and adding MIME types:

Navigation: Home » Service Director » Web Hosting » Accounts

Click **Manage** in front of webhosting account. Click on the **MIME Types** to get to this option. You may add new MIME Type by clicking on **Add MIME Type** button.

1. **Extension:** Enter file extension e.g. .doc, .txt, .mpg etc.
2. **Content Type (MIME):** Specify type of content.

Virtual Directory

You can view/add virtual directory entries at:

Click **Manage** in front of webhosting account. Click on the **Virtual Directory** to get to this option. New virtual directory can be created by simply clicking on the **Add Virtual Directory** button.

1. **Name:** Enter the name of virtual directory you want to create.
2. **Path:** Browse for the path of virtual directory.
3. **Points To:** Select if you want it to point to a physical location on a hard drive/network or a web URL.
4. **Permissions:** Set required permission/privileges as per your requirement.
5. **Execute permission:** Allows permission to run scripts and executables.

Finally, click **Save** button to ensure changes are made.

Scripting

To enable scripting support navigate to the following path:

Click **Manage** in front of webhosting account. Following scripting languages are supported:

1. ASP Support
2. ASP.NET Support
3. PHP Support
4. Perl Support
5. Python Support
6. ColdFusion Support

Installed: Shows the status if the support for the specific scripting language is installed or not.

Options: You can install/remove and enable/disable support for a scripting language.

Once done, it will add scripting language extensions to the domain in IIS based on the extensions you specified in the IIS.

FTP Users

Please navigate to following path for adding and configuring FTP users:
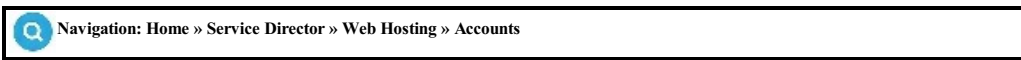
Click **Manage** in front of webhosting account. Now click on **FTP** to view an manage FTP users.

Click on **Add FTP User** to create a new FTP user.

1. **FTP account name:** Specify name of FTP account.
2. **Home directory:** Mention the path of home directory to use.
3. **Password:** Enter the password for the corresponding FTP account.
4. **Confirm Password:** Re-enter the same password for confirmation.
5. **Read Permission:** Allow read rights.
6. **Write Permission:** Allow write rights.

Clicking **Save** button will update changes.

Databases

You can add/remove/manage the Databases that are supported by the provider and configured under the Control Panel by navigating to following section:
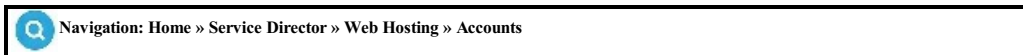
Click **Manage** in front of webhosting account. Click **Databases** to get to this option. Click on **Add Database** button to create another database.

1. **Provider:** Select what type of database you version want to create. i.e. SQL or MySQL
2. **Select Provider:** Select the version.of the database.
3. **Database Name:** Specify instance name for database.
4. **Database Size:** Select the size of the database.
5. **Database Username:** Provide respective database username.
6. **Password:** Provide password.

Click **Save** button to update changes.
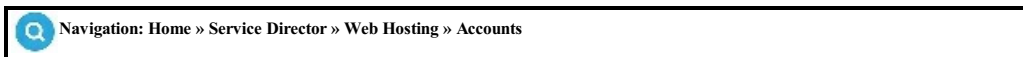
Click **Database Users** tab to configure database users.

1. **Database:** Select Database.
2. **Database Username:** Provide database username.
3. **Password:** Provide password.

Click **Save** when done.

ODBC

For ODBC configuration navigate to following path and click on the **ODBC DSN** link to get to this option:
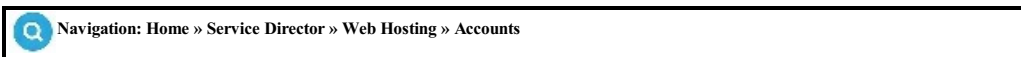
Click **Manage** in front of webhosting account. Click **Add ODBC DSN** button to add new ODBC DSN.

1. **Driver:** Specify your preferred driver for database connectivity.
2. **Data source name:** Enter string for data source.
3. **Database name:** Name of database instance.
4. **Database user:** Select respective database user.

For changes to take effect, click **Save** button.

File Manager

Please navigate to following path for adding and configuring file manager:

Click **Manage** in front of web hosting account. Select **File Manager**.

Operations In File Manager

Following operations can be performed in file manager:

1. **Sync:** Default folders created and used by control panel cannot be removed, renamed, cannot change permissions. You can sync the folders by clicking on **Sync** icon.
2. **Add Folder:** Click on **Add a Folder** icon to add a new folder. You can also add folders inside a folder.
3. **Create Text File:** Select folder and click on **Create Text File** icon. You can also **Edit** and preview Text file.
4. **Copy Files:** Select file to copy and click on **Copy Folder(s)/File(s)** icon.
5. **Move Files:** Select file to move and click on **Move Folder(s)/File(s)** icon. Select folder from tree list to move files.
6. **Rename:** Select file to rename and click on **Rename** icon.
7. **Delete Folder(s)/File(s):** Select folder(s)/file(s) to be deleted and click on **Delete Folder(s)/Files(s)** icon.
8. **Upload/Download:** Select folder/files and click on **Upload/Download** icon.
9. **Zip/Unzip:** Similarly, select folder/files and click on **Create Zip/UnZip** icon.

Shared SSL links

Control Panel provides shared SSL enable/disable option to its web hosting users.
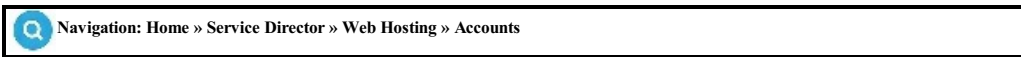
To view SSL links navigate to the following path:
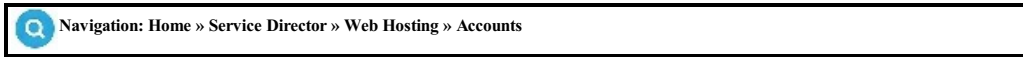
Click on the **Manage** for any account to show options to Enable and manage corresponding hosting account.

SOA

SOA: Start of Authority (SOA) defines the zone name, an e-mail contact and various time and refresh values applicable to the zone. For SOA configuration navigate to following path:

Click **Manage** in front of "Hosting account" or "DNS Only Subscriptions".

Click on DNS link and then click on **SOA record** tab to view SOA records.

1. **Refresh Interval:** Enter the refresh period, i.e. the frequency with which the data should be checked by a secondary name server.
2. **Retry Interval:** The retry period, i.e. how often a failed attempt to connect should be retried.
3. **Expire Interval:** How soon the data should expire if it hasn't been refreshed.
4. **TTL:** The default minimal Time To Live (TTL) of the data.

Website Stats

To view website stats navigate to the following path:
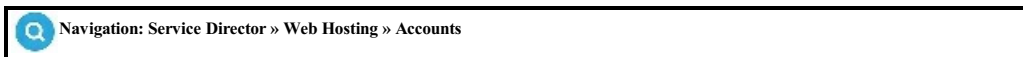
Click on the **Manage** for any account to show options to manipulate and manage corresponding hosting account. Click on **Website Stats** service control.

You can add, view or delete website stats by clicking on **Add Website Stats** button, **view** or **remove** respectively.

Click on the **Manage** for any account to show options to manipulate and manage corresponding hosting account. Click on **Website Stats** service control.

DNS Record

For DNS configuration navigate to following path:

Click **Manage** in front of "Hosting account" Click on the **DNS** to get to DNS zones.

Note: For "DNS Only subscriptions" Under **DNS Zones** tab, you can either **Create DNS Zone** or **Import DNS Zone.** Under options you can **Manage** (DNS records), **Remove** and **Create Reverse Lookup** of your DNS zone.

Click on **Add DNS Record** button to include a new DNS entry.

1. **Record Type:** Select the type of resource record such as NS, A, MX, CName etc.
    i. **NS:** Name Server records (NS) state the authoritative name servers for the given domain.
    ii. **A:** Address records (A) that map the name of a machine to its numeric IP address.
    iii. **MX:** MX (Mail exchanger) resource record identifies the mail server that is responsible for handling e-mails for a given domain name.
        a. MX record must point to hosts defined by A records.
        b. MX record cannot point to IP addresses.
    iv. **CName:** A CNAME record or Canonical Name record is a type of resource record in the Domain Name System (DNS) that specifies that the domain name is an alias of another, canonical domain name.
    v. **TXT:** Text information associated with a domain.
    vi. **SRV:** A Service record (SRV record) is a specification of data in the Domain Name System defining the location, i.e. the hostname and port number, of servers for specified services.
2. **Name:** Specify the name of the node in the zone file to which this record belongs
3. **FQDN:** A Fully Qualified Domain Name (FQDN) is the complete domain name for a specific host on the Internet.
4. **TTL:** Type the default minimal Time To Live (TTL) in seconds.
5. **Class:** A 16 bit value which defines the protocol family or an instance of the protocol. The normal value is IN = Internet protocol.
6. **FQDN for target host:** A Fully Qualified Domain Name (FQDN) is the complete domain name for the target host.

Click **Save** button to update changes. Click here to manage SOA record.

Temporary URL

To enable Temporary URL navigate to the following path:

Click on **Manage** in front of the subscription. Click **Temporary URL** and click enable/disable.

Click on **Manage** in front of the subscription. Click **Temporary URL** and click enable/disable.

Email Management

Please navigate to following path to access Email Management section:

Click on **Manage** in front of "Hosting account" or "Mail Only Subscriptions".

You can manage following under **Email Management** section.

1. Turn On/Off
2. Mail Domain Alias
3. Email Accounts
4. Email Lists
5. Email Groups

E-mail Accounts

Please follow the below mentioned navigation path to view, create, remove and configure an e-mail account:

Click **Manage** in front of "Hosting account" or "Mail Only Subscriptions". Email accounts list shows following details:

1. **Status:** It displays status.
2. **Display Name:** Display name of email account.
3. **E-mail:** E-mail address assigned to e-mail account.
4. **Size(MB):** Disk space allocated for e-mail account.
5. **Auto responder:** It shows auto responder enabled or disabled.
6. **ActiveSync:** It shows active sync enabled or disabled.
7. **Options:** It shows **Remove** option for the e-mail account.

For creating new e-mail account click on **Add Email Account** button.

1. **E-mail Account:** E-mail address assigned to that e-mail account.
2. **New Password:** Enter password for current e-mail account.
3. **Confirm Password:** Re-enter same password for confirmation purpose.
4. **Mailbox Size (MB):** Usage space or e-mail quota.

Clicking on **Save** button will update changes.

E-mail Lists

A list of e-mail addresses identified by a single name such as mail@companyname.com is an e-mail list.

You may configure e-mail lists at:

Click **Manage** in front of "Hosting account" or "Mail Only Subscriptions". Click on **Email Lists** service control under **Email Management**.

You can create new email lists by clicking on **Add Email List** button.

1. **List Name:** Provide list name.
2. **List moderator:** Select list moderator from dropdown.
3. **List type:** Select list type i.e. Unmoderated or Moderated.
4. **Description:** Provide description.
5. **Allowed posters:** Select posters.
6. **Posting requires password:** Provide password.
7. **List subject prefix:** Select from drop down list.
8. **Reply to mode:** Select from drop down list.
9. **Max message size (MB):** Provide size in MB's
10. **Max recipient per message:** Provide max limit.
11. **Enable header:** Check box
12. **Enable Footer:** Check box
13. **Allow subscription via e-mail:** Check box
14. **Allow unsubscribe from subject:** Check box
15. **Enable digest mode:** Check box

Click **Save** when done.

E-mail Groups

Groups of people having common interests can participate in discussions using e-mail.

For enlisting and configuring e-mail groups navigate to:

Navigation: Home » Service Director » Web Hosting » Accounts
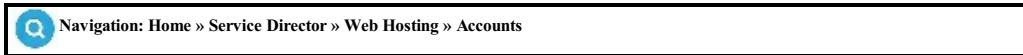
Click **Manage** in front of "Hosting account" or "Mail Only Subscriptions". It displays following in the listing:

1. **Display name:** It displays group name.
2. **Members:** It shows member added to group.
3. **Options:** It shows option to remove the email group.

Click on **Add Email Group** button.

1. **Email group name:** Provide email group name.
2. **Group Members:** Select group members
3. **Group Email Address:** Provide email address.
4. **Enabled:** Check box

Finally click **Save** button.

Viewing Database Only Subscriptions

To view database only subscriptions navigate to the following path:

> Navigation: Home » Service Director » Web Hosting » Accounts

Select **Database Only Subscriptions** tab. It displays following listing:

1. **Status:** It shows status of subscription.
2. **Subsc.ID:** It shows subscription id.
3. **Domain Name:** It shows domain name.
4. **Package:** It shows package name.
5. **Customer ID:** It shows customer id.
6. **Options:** Under options you can manage following:
    a. Manage Databases
    b. Manage ODBC Dsn

Manage Databases

Click **Manage Databases** button to manage databases and its users. Click on **Add Database** button to create new database.

1. **Provider:** Select what type of database you version want to create. i.e. SQL or MySQL
2. **Select Provider:** Select the version.of the database.
3. **Database Name:** Specify instance name for database.
4. **Database Size:** Select the size of the database.
5. **Database Username:** Provide respective database username.
6. **Password:** Provide password.

Click **Save** button to update changes.

To add new users click **Database Users** tab.

1. **Database:** Select Database.
2. **Database Username:** Provide database username.
3. **Password:** Provide password.

Click **Save** when done.

Manage ODBC Dsn

Click **Manage ODBC Dsn** button to manage ODBC Dsn. Click the **Add ODBC DSN** button to add new ODBC DSN.

1. **Driver:** Specify your preferred driver for database connectivity.
2. **Data source name:** Enter string for data source.
3. **Database name:** Name of database instance.
4. **Database user:** Select respective database user.

For changes to take effect, click **Save** button.

Viewing Mail Only Subscriptions

To view mail only subscriptions navigate to the following path:

Navigation: Home » Service Director » Web Hosting » Accounts

Select **Mail Only Subscriptions** tab. It displays following listing:

1. **Status:** It shows status of subscription.
2. **Subsc.ID:** It shows subscription id.
3. **Domain Name:** It shows domain name.
4. **Package:** It shows package name.
5. **Customer ID:** It shows customer id.
6. **Options:** Under options you can **manage** mail only subscription.

You can manage following under **Email Management** section.

1. Turn On/Off
2. Mail Domain Alias
3. Email Accounts
4. Email Lists
5. Email Groups

Viewing DNS Only Subscriptions

To view DNS only subscriptions navigate to the following path:

Select **DNS Only Subscriptions** tab. It displays following listing:

1. **Status:** It shows status of subscription.
2. **Subsc.ID:** It shows subscription id.
3. **Domain Name:** It shows domain name.
4. **Package:** It shows package name.
5. **Customer ID:** It shows customer id.
6. **Options:** Under options you can manage DNS zones and DNS records.

Web Hosting Plans Management

Hosting Plans are created through powerful Service Plan Wizard. It includes following:

1. Reseller Product Listing
2. Customer Product Listing
3. Add-ons Management

To create a hosting plan, navigate to following path:

 Navigation: Home » Service Plans » Hosting Products

Note: You can also edit existing shared hosting plans by clicking the **Edit** link at desired plan that you want to modify.

Click **Add New Product** button. When the page loads, you will see the following settings.

1. **Product Type:** Select **Shared Hosting** from the drop-down list.
2. **Control Panel:** If you select Shared Hosting or Reseller Hosting product type then you will see this box. It lets you select the control panel you are using for the product provisioning.
3. **Server Group:** If you select Shared Hosting or Reseller Hosting product type then you will see this box. It lets you select the server group where this package will be provisioned.
4. **Product Name:** Enter the name of your product.
5. **Is Active:** Select No if you want to disable this product selling.
6. **Select Package Type:** You need to select one of following for package type:
     i. Web Hosting
     ii. DNS Only
     iii. Database Only
     iv. Mail Only
7. **Allow Prorate**: Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
8. **Associate Addon:** You may want to associate addon with this product. Your choices are:
     a. Optional
     b. Required
     c. Suppressed
9. **Associate Domain:** Select how you want to associate domains with this product. Your choices are:
     a. Optional
     b. Required
     c. Suppressed
10. **Date:** This is date set by the system (not editable).
11. **Enabled For Commission Reseller(s):** If you check this option the Customer Product Plan will be enabled for Commission type Resellers. (Visible only if Commission Type Reseller option is enabled in Built-in Module.)
     i. All Resellers
     ii. Select Resellers
12. **Product Comments:** Enter any comments you want to associate with this product.

Once you click the **Next** button you will be present with series of forms to configure your product.

Payment Cycles: This form lets you select Payment Cycles for the plan. You must select at least one payment cycle and payment group.

Select the payment cycle and click right arrow button to move it to **Selected Cycles** list.

Select the payment group and click right arrow button to move it to **Selected Payment Groups** list.

Price Group: This form lets you set prices for the Payment Cycles and Payment Groups you have selected in the previous step. Here you may set:

a. Setup Price
b. Price
c. Discount

Enter prices in each box.

Possible Product Upgrade / Downgrade: Here you can configure the upgrade and downgrade behavior of this product. When a product is purchased, your client my perform upgrade/downgrade from their control center without your involvement.

Associate Addon: This form lets you associate addon with your hosting plan. Your client may buy these addon using online store or order them through their customer control center.

Click **Finish** button to complete product setup.

1. Click Dedicated Hosting to view dedicated hosting plan management.
2. Click [SSL Hosting](#) to view SSL hosting plan management.

Overview Hosting Setup

Navigate to the following path for Setup section related to shared web hosting:

Here you can manage different options like:

1. Setup/modify the [Parking Page](#).
2. Setup/modify the [Suspend Page](#).
3. Configure [Disk Quota calculation and Bandwidth calculation](#).

Parking Page Setup

This section allows you to modify the look and feel of existing parking page. Control Panel has built in HTML editor that allows you to modify the parking page. To modify parking page navigate to the following path:

🔍 **Navigation: Home » Service Director » Web Hosting » Setup**

Choose **Parking Page** tab to easily view and modify built in parking pages by clicking on **View** and **Edit** buttons respectively.

1. **Parking Page Template Name:**The name of the parking page.
2. **Type:**The type of the page.
3. **File Name:** The name of the file.

Suspend Page Setup

To view and modify Suspend Page navigate to the following path:

Navigation: Home » Service Director » Web Hosting » Setup

Choose **Suspend Page** tab to view following options:

1. **Suspend Page Name:** It displays the name of the suspend page.
2. **Options:** The following are the options:
   i. View
   ii. Edit

You can easily view and modify built in Suspend pages by clicking on **View** and **Edit** respectively.

1. **Parking Page Template Name:** The name of the parking page .
2. **Type:** The type of the page.

Click on **Save** button to save the changes when done.

Quota Settings

To set Quota Settings navigate to the following path:

Choose **Quota Settings** tab. It displays the following:

Disk Quota calculation

1. **Calculation interval:** Select interval in hours to specify the disk usage calculation interval.
2. **Send email to:** If yes (When disk usage is reached allowed limit email alert will be send to a selected member).
      i. Customer only
      ii. Owner only
      iii. Both Owner and Customer
3. **Automatic Suspend Service:** When disk is over the specified limit, the website service will be automatically suspended.
4. **Automatic Resume:** When disk usage is back to normal limit, the website service will be automatically resumed.

Bandwidth calculation

1. **Calculation interval:** Select interval in hours to specify the bandwidth calculation interval.
2. **Send email to:** If yes then select (When bandwidth usage is reached allowed limit email alert will be send to a selected member)
      i. Customer only
      ii. Owner only
      iii. Both Owner and Customer
3. **Automatic Suspend Service:** When bandwidth is over used or reach to the specified limit, the website service will be automatically suspended.
4. **Automatic Resume:** When bandwidth usage is back to normal limit, the website service will be automatically resumed.

Click on **Save** button when done.

DNS Templates

DNS templates are associated with services and used to provision DNS records.Control Panel provides you different DNS templates which you can modify according to your needs. To view/setup DNS templates you have to navigate to the following path:

Note: Existing DNS templates can be modified by simply clicking on **Edit**.

Click on **Add DNS Template** button to create a new DNS template.

1. **Template Title:** Title or name for the designated template.
2. **Name:** Name of the node to which this record pertains.
3. **Class:** A 16 bit value which defines the protocol family or an instance of the protocol. The normal value is IN = Internet protocol.
4. **DNS Type:** Select the type of resource record such as NS, A, MX, CName, SRV etc.
    i. **NS:** Name Server records (NS) state the authoritative name servers for the given domain.
    ii. **A:** Address records (A) that map the name of a machine to its numeric IP address.
    iii. **MX:** MX (Mail eXchanger) resource record identifies the mail server that is responsible for handling e-mails for a given domain name.
        a. MX record must point to hosts defined by A records.
        b. MX record cannot point to IP addresses.
    iv. **CName:** A CNAME record or Canonical Name record is a type of resource record in the Domain Name System (DNS) that specifies that the domain name is an alias of another, canonical domain name.
    v. **TXT:** Text information associated with a domain.
    vi. **SRV:** A Service record (SRV record) is a specification of data in the Domain Name System defining the location, i.e. the hostname and port number, of servers for specified services.
5. **Priority:** Provide priority.
6. **Weight:** Provide weight.
7. **Port:** Provide port number.
8. **Host:** Specify IP Address of server where service is provisioned or actual domain name using customization keys.

Click **Save** button to update changes.

Name Server Group Management

To view DNS server or Name server group navigate to the following path:

Note: You can also edit existing Name Server Group by clicking on **Edit**.

Following fields should be completed to search Names server:

1. **Host Name:** Enter host name.
2. **IP Address:** Enter IP address.

Then, click on the **Search** button.

It shows following listing for Name servers:

1. **ID:** It displays id of the name server group
2. **Name:** It displays name of the name server group.
3. **Default:** It displays if the name server is default.
4. **Option:** It displays options such as Edit / Remove.

Click on **Add Server Group** button. A new screen will display following:

1. **Name Server Group Name:** This is the friendly name of the name server group.
2. **Name Server 1:** Enter the name for Name Server 1.
3. **Name Server 2:** Enter the name for Name Server 2.
4. **IP Address:** Specify the IP address of the designated Name Server.

Click **Save** button to proceed.

Add DNS Zone

To add a new DNS zone navigate to the following path:

To search a DNS zone provide the following fields Owner, DNS Server, Domain Name, Customer ID, Customer Name, Status and click **search** button.

To import DNS zones click on **Import DNS Zones** button. You can also Add Bulk DNS Zones

1. **Select server:** Select Server from the drop down list.
2. **Select One HM-server:** Select the Hostmatic server from the drop down list.

and click on **Get DNS Zone** button.

It displays the following listings:

1. **Customer:** It shows the customer name.
2. **Domain Name:** It shows the domain name.
3. **DNS Server:** It shows the DNS server.
4. **Options :** you can mange your DNS zones and remove the zones.

Add Bulk DNS Zones

To add bulk DNS zones navigate to the following path:

Click **Add Bulk DNS Zones** and provide following:

1. **Select Customer:** Select customer
2. **Upload CSV (one domain per line):** Select file
3. **Enter comma separated domain names:** Or Provide comma separated domains.
4. **Select primary DNS server:** Select primary DNS server
5. **Select Name Servers Group:** Select name server group.
6. **Select DNS Template:** Select DNS template.

Click **Save** when done.

Web Redirect

To add a web redirect rule navigate to the following path:

Select **Web Redirect** tab and click **Add Redirect Rule**.

1. **Upload CSV (one domain per line):** You can upload domain names via csv file
2. (OR)
3. **Select DNS Zones:** or Select zones
4. **Select Rule Option:** Select Default Rule or specify Host Name.
5. **Redirect Url:** Provide redirect URL.

Click **Save** when done.

Domain Names

Control Panel has complete integration of various Domain Name Registrars. Provider can configure a domain registrar in control panel and allow users to register domain names. When a domain is registered using the control panel, users can avail facility of managing the domain name and perform different operations.

Navigate to following path to access domain names:

You can search domain name by following:

1. **Subsc.ID:** Enter subscription ID.
2. **Domain Name:** Enter domain name.
3. **Status:** Select status.
    i. Active
    ii. On-hold
    iii. Pending
    iv. Expired

You will see the following listing:

1. **Subscription ID:**It displays the subscription ID.
2. **Domain Name:** It displays the domain name.
3. **Customer ID:** It displays the customer id.
4. **Customer Name:** It displays the customer name.
5. **Company Name:** It displays the customer name.
6. **Manage:** Click on this link to manage domain name.

General tab displays important and universal data like subscription id, domain name, billing cycle, status information, domain DNS servers and shows if the domain is locked or free, domain can be locked from here.

WHOIS Lookup: Click this for WHOIS lookup.

You can access, modify or update contact information at the **Contact** tab e.g. administrator, registrant, technical & billing contact info etc.

Finally, there is **Advanced** tab where name servers information can be entered like **Name servers**, **IP address** etc.

Perform Group Actions (Domain Names)

To perform Group actions for domain names navigate to following path:

Under **Domain Names** tab, you will see **Group Actions** button.

1. **Upload CSV (one domain per line):** Select CSV file and click **Upload**.
2. **Please select domain(s) for group action:** Select domain names from selectable to selected column.

Under **Operations** you can **Lock/Unlock** selected domain or **Cancel Domains.**

Expand **Change Names Server** it will display following:

1. **Name Server 1:** Enter the name for Name Server 1.
2. **Name Server 2:** Enter the name for Name Server 2.
3. **Name Server 3:** Enter the name for Name Server 3.
4. **Name Server 4:** Enter the name for Name Server 4.

Click **Save** button to proceed.

Add Contacts (Domain Names)

To view & add contacts for domain name navigate to following path:

Under **Contacts Management** tab, you will see following listing for contacts:

1. **Contact Details:** It shows contact details save for the contact.
2. **Owner:** It shows the owner of contact.
3. **Customer:** It shows customer Id and name.
4. **Options:** It shows option to Edit/remove the contact.

To add new contact click **Add Contact**.

1. **Select Company:** Select company from dropdown list.
2. **Select Customer:** Select customer from dropdown list.
3. **Select Registrar:** Select registrar from dropdown list.
4. **Use For:** Select one of the contact is use for.
5. **First Name:** Provide first name of contact.
6. **Last Name:** Provide last name of the contact.
7. **Company:** Provide company name
8. **Email:** Provide email address.
9. **Address:** Provide address.
10. **City:** Provide city.
11. **State/Province:** Provide state/province.
12. **Zip/Postal Code:** Provide zip code.
13. **Country:** Provide country.
14. **Phone:** Provide phone number.
15. **Legal Form:** Select legal form from the drop down list.
16. **Legal form Reg No:** Provide legal for registration number.

Click **Save** when done.

Viewing Domain Verification

Domain Verification is an auto-remove unverified domain option in control panel. It will remove the non-verified domains automatically when the time reaches as mentioned say 7 days etc. Existing domains can also be skipped from verification by using the provided option. If disabled, Domain Verification would not be considered in panel.

To manage domain verification navigate to following path:

Navigation: Home » Service Director » Domain Names » Domain Verification

To enable domain verification specify following:

1. **Domain Verification Enabled:** Check box
2. **Auto remove domain if not verified:** Select days from drop down list.
3. **Verify Existing Domains:** Check box

Click **Save** when done.

Note: If Domain Verification is enabled and existing domains are not added for verification, all the existing domains are considered as verified. After that, if "Verify Existing Domains" is selected and settings are updated, it will not add the existing domains for verification

Pending Verification

To verify pending domains navigate to following path:
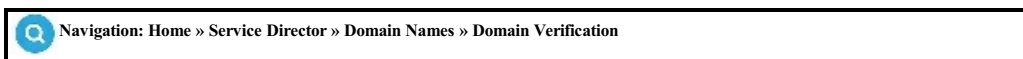
Select **Pending Verification** tab. Domains that are still pending for verification are listed here.

You can perform following operations for pending domains:

1. **Marked as Verified:** Clicking this will mark the selected Domain(s) as verified.
2. **Add to Exempted:** Clicking this will move the selected Domain(s) to exempted domain list if no more in use.
3. **Remove:** Clicking this will remove the selected Domain(s) from verification and from the corresponding enterprise modules as well if not in use.
4. **Remove and Cancel Subscription:** Clicking this will remove the selected Domain(s) and the corresponding subscription can be cancelled.

Note: User/mailbox can't be created using the domain which is not verified yet.

Verified Domains

To view and manage verified domains navigate to following path:

Select **Verified** tab. Under Verified tab verified domains are listed.

You can perform following operations for verified domains:

1. **Marked as Un-Verified:** Clicking this will mark the selected Domain(s) as un-verified for re-verification purpose.
2. **Add to Exempted:** Clicking this will move the selected Domain(s) to exempted domain list if no more in use.

Exempted Domains Management

Exempted Domains are the Domains that can not be entered in the Domain Name field throughout the system. Follow the below mentioned path to view and manage exempted domains:

Navigation: Home » Service Director » Domain Names » Domain Verification

Select **Exempted Domains** tab.

You can view the following:

1. **Domain Names:** It displays the domain names.
2. **Options:** It allows you to **add**, **edit** or **remove** exempted domains as and when required.

Usage Report (Domain Names)

To view usage report of domain names navigate to following path to access domain names:

Under **Expiring Domains** tab you will see the following listing:

You can search domain name by following:

1. Customer Name
2. Company name
3. TLD Name
4. Domain Name
5. Registrar
6. Expiring in no of days

You can also **Export to Excel** the Expiring domain usage report.

1. **Domain Name:** It shows domain name.
2. **Next Renewal:** It shows next renewal date.
3. **Customer:** It shows customer ID & name.
4. **Owner:** It shows owner name.
5. **Registrar:** It shows the registrar in use.
6. **Domain lock status:** It shows domain status.

Under **Detailed Usage** tab you will see the following listing:

You can search domain name by following:

1. Customer Name
2. Company name
3. TLD Name
4. Domain Name
5. Registrar

You can also **Export to Excel** the detailed usage report.

1. **Domain Name:** It shows domain name.
2. **Next Renewal:** It shows next renewal date.
3. **Customer:** It shows customer ID & name.
4. **Owner:** It shows owner name.
5. **Registrar:** It shows the registrar in use.
6. **Domain lock status:** It shows domain status.
7. **Owner Email:** It shows owner email address.
8. **Admin email:** It shows admin email address.
9. **Billing Email:** It shows billing email address.
10. **Technical Email:** It shows technical email address.

Exchange Hosting

Control Panel allows Exchange inventory, monitoring, reporting, auditing and specific role based groups in Exchange Hosting. The purpose of this document is to elaborate those specific monitoring concepts which are being used specifically in Exchange Hosting module and to facilitate you towards friendly adoption of Control Panel environment.

Inventory

The concepts involved in inventory are the following:

1. **Sites:** It shows the active directory site name.
2. **Domain Controllers:** It shows the domain controllers added along with DNS host name and site.
3. **Exchange Servers:** It shows all the Exchange servers added with the other details like FQDN, Role, Domain etc.

Monitoring

You can keep an eye on the storage and server health of your exchange servers i.e. the Mailbox size, Mailbox Database size and Server Volume.

Click Exchange Monitoring to view more details.

Reports

You can view SPLA Reports and Usage Reports for Exchange accounts under **Reports** tab. Click SPLA Report to view SPLA reports and click Usage Report to view usage reports.

Auditing

You can export Mailbox audit logs and admin audit log. To view more details click Auditing.

RBAC

You can also add Role Groups for your customers. To view more details click RBAC.

Orchestration Module for Microsoft Exchange

Control Panel allows Hosted Exchange Service through its Orchestration Module for Microsoft Exchange. Control Panel Automation Module for Exchange is designed for all sizes of service providers wanting to start or grow their Hosted Exchange business while minimizing ongoing support costs.

Control Panel Orchestration Module for Microsoft Exchange fully automates, controls service delivery and manages billing and provides self service control panel to your customer. Control panel supports following versions of Microsoft Exchange.

1. Microsoft Exchange 2007
2. Microsoft Exchange 2010
3. Microsoft Exchange 2010 Hosted
4. Microsoft Exchange 2013
5. Microsoft Exchange 2016
6. Microsoft Exchange 2019

Note: Please make sure you have subscribed to Orchestration Module for Microsoft Exchange to avail this service otherwise you won't be able to utilize this feature. If you have any questions or want to avail this feature, please contact your service provider.

Exchange Server Groups Overview

With Control Panel you may organize your Exchange server cluster in groups. The groups are particularly effective for segregating exchange servers based on their role or capacity. For example, you may want to reserve couple of servers for highly paid customers only. You can do this by creating a server group and then adding those servers to that group.

Example:

1. Create a server group called **Corporate Customers**.
2. Assign **Exchange Server 2019** as the provider.
3. Add 2 servers to this Server Group. These are actual servers where Exchange mailbox role is installed.
4. Create a hosting plan "Corporate Gold Mail Hosting" and assign **Corporate Customers** group to this package.

Note: For Exchange 2010 hosting mode CAS server need to be installed.

Now, when you sell Corporate Gold Mail Hosting the Control Panel will automatically provision the hosted email service on one of the two member servers.

Viewing Exchange Server Groups

To view/manage exchange server groups navigate to the following path:

The list of server groups displays following:

1. **Status:** It shows the status of server group.
2. **Server Group Name:** It shows server group name.
3. **Provider:** Indicates the Exchange server provider for this server group.
4. **Options:** It shows following options:
     i. **Add Group Member:** Click on this link to add a new member to the existing server group.
    ii. **Disable:** To disable a server group click on disable link.
   iii. **Edit:** Click on this link to edit server group properties.
    iv. **Assign UM policy:** To assign Unified Messaging Policy.(Not available for Exchange 2010 Hosted)
     v. **PST Export Settings:** PST Export or backup email, contacts, and calendar to an Outlook.pst file is possible by using PST Export settings.
    vi. **Remove:** Click to remove server group. You cannot remove a server group if there are active servers with active subscriptions.

Exchange UM Polices:

You have to create a **UM (Unified messaging) policy** at your Exchange server first. Clicking on *Assign UM Policy* from **Options** column, a new tab **Exchange UM** Policies will open:

Add a New Policy for enabling Unified messaging for your Mailbox Users. See how to add Unified Messaging for Mailboxes.

You can also **Edit Assignment** of UM policies for your Customer/Resellers.

Email Clients:

Click on **Add Email Clients** button under **Email Clients** tab:

1. **Display Name:** Provide display name.
2. **URL:** Provide URL to download email client/outlook.

Click on **Save** button when done.

Exchange Server Group Members Management

To view/manage exchange server group members navigate to the following path:

Click on the **Server Group Name**, a new tab **Exchange Hosting Servers** will open.

The list of server group members displays following:

1. **Status:** It shows the status of server.
2. **Server Name:** Friendly name of the server.
3. **Options:** It shows following in the options:
    i. **Test Service:** Click on Test service to check that server are connected and integrated successfully.
    ii. **Disable:** Click on this link to disable hosted email provisioning on the server. You may want to do this if server is down or it is full.
    iii. **Edit:** Click on Edit to edit server properties.
    iv. **Remove:** Click to remove server from group. You cannot remove a server if there are active subscriptions on it.

Add/Edit Exchange Server Group

To add a exchange server group navigate to the following path:
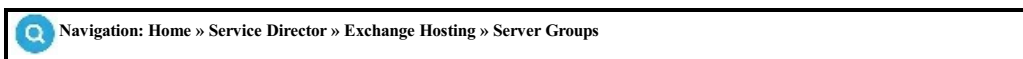
Note: You can also edit existing server group by clicking on the **Edit**.

Click on **Add Server Group** button. A new screen will display following:

1. **Server Group Name:** This is the friendly name of the server group. For example, Corporate Customers.
2. **Provider:** Select the hosted email provider for this group, for e.g. Exchange Server 2016 Hosting.
3. **Active Directory Domain:** Select the active directory domain of this Exchange server. See How to Add Active Directory Domain section to learn about managing active directory domains.
4. **LDAP URL:** This is the location of active directory OU under which Control Panel will create exchange organization. You may change this location any time as this will not affect existing accounts. Example: LDAP://OU=Control Panel System, OU=Hosting, DC=Fabrikam, DC=COM
5. **Prefered domain Controller:** Provide FQDN of Preferred domain controller.
6. **Fill Style:** Select from one of the two options.
   a. **Least Filled First:** Setup hosting on the group member which is least filled.
   b. **One-by-One:** Setup hosting on group members in circular manner.
7. **Enabled:** If unchecked, system will not provision any accounts on the server group members.
8. **Override Domain Credentials:** You can check this option and use credentials other than the one mentioned in the Active Directory Domain.

Expand the **Optional Setting** section to view the following fields:

Note: The domain name used is example.com

- **Platform access domain:** The platform access domain can be acquired from the back-end by typing the following command at power shell.

CMD: Get-outlookAnywhere | fl Externalhostname

- **Auto discover URL:** As the domain is example.com so the value for auto discover should be autodiscover.example.com. This value is acquirable from the backend server by using the following command at PS.

CMD: Get-autodiscovervirtualdirectory | fl ExternalURL

- **Auto discover redirect URL:** As the domain is example.com so the value for auto discover redirect URL should be autodiscoveredirect.example.com. This value need to be input manually.
- **MX record address:** MX values in example.com public zone. In our example it will be mx1.example.com, mx2.example.com. These values need to be input manually.
- **OWA URL:** The OWA URL can be acquired from the backend server by typing the following command.

CMD: Get-OwaVirtualDirectory | fl ExternalURL

- **Outlook Anywhere URL:** The Outlook Anywhere URL can be acquired from the backend server by typing the following command.

CMD: Get-outlookAnywhere | fl Externalhostname

- **Incoming mail Address (POP/IMAP):** These values need to be input manually. As domain is example.com so the value for POP should be pop.example.com which should be pointing to CAS. As domain is example.com so the value for IMAP should be imap.example.com which should be pointing to CAS.
- **Outgoing Mail (SMTP):** As domain is example.com so the value for SMTP should be smtp.example.com which should be pointing to HUB Server. This value need to be input manually.
- **Exchange Proxy Settings:** This value can be acquirable from the backend Exchange Server.

Click **Next** button to proceed to step-2. Now you will be prompted to add exchange server group member.

Add/Edit Exchange Server Group Member

Group Member is exchange server added to server group. To add a exchange server as group member navigate to the following path:

Note: You can also edit existing server group by clicking on the **Edit** link.

Click on **Add Group Member** button in front of desired server group.

1. **Reference ID:** This can be any internal ID you want to assign.
2. **Server alias:** Enter a friendly name of the exchange server being added.
3. **IP:** Enter the IP address of the Exchange Server.
4. **DAG Servers:** Provide DAG Server IP addresses.
5. **OAB distribution method:** Select the desired method for OAB distribution. [**Only visible for Ex 2007/Ex 2010 SP1**]
6. **Remote Server FQDN:** Enter the exchange server name or FQDN. For example, exch1.mymedia.net. Click on **Get Mailbox Databases** button to retrieve the list of exchange mailbox databases.
7. **CAS Internal FQDN:** Enter the CAS server name or FQDN.
8. **Public folder server FQDN:** Provide the public folder FQDN, same as remote Server FQDN.
9. **Public Folder database:** Select the Public Folder database from the drop down list.
10. **Handle DNS:** You must have manually created the zone and MX record if this option is left unchecked. But checking this option enables automatic creation of zone and MX record through Control Panel. For this, you need to add web server and configure DNS Service on it. [Click here](#) for details.
11. **Select Primary DNS Server:** Choose name of Primary DNS Server.
    a. **Apply DNS template:** Choose DNS Template you want to apply when Exchange Organization is provisioned.
    b. **CAS server/CAS array public IP:** Specify public IP of CAS server/CAS array.

Click on **Finish** button.

Note: OAB distribution method field is NOT available for Exchange 2010 Hosting mode and Exchange 2013/2016/2019.

Email Client

To configure download for Email Client, navigate to the following path:
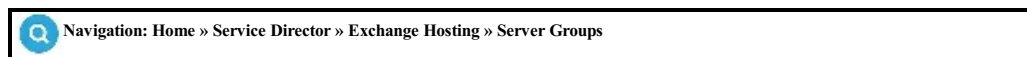
Select **Email Client** tab. Click on **Add Email Clients**.

1. Select **Email Client Type** as Outlook or Entourage.
2. Provide display name.
3. Provide a URL to download Outlook/Entourage Client.

Click **Save** when done.

Allow Customers to Download Outlook Client

You can charge your customers separately for Email clients.

To allow Customers/Resellers download outlook client for their email users, you can check/uncheck "**Outlook License Enable On**" option under "Exchange Service Plans".

When "Outlook License Enabled" is checked from service plan or via Add-on, the mailbox set up with this option will have an option in 4th Level Interface to download outlook. The link to download will not be static if this option is enabled/checked and download link will work <u>ONLY ONCE</u> for each click.

This will also be shown in Mailbox usage report.

To create a hosted email plan navigate to following path:

Under **Resources** tab you can check the option Outlook License Enable On.

Note: You can also edit existing hosted email plans by clicking on the **Edit**. and **Sync sold plan resources.**

If this **Sync sold plan resources** checkbox is checked, product name, comments, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox settings.

Assign UM Policy

UM allows an Exchange organization to store voicemail and faxes along with email, calendars and contacts in users' mailboxes.

First of all, **UM Policy >> UM Dial Plans** are created and managed on backend, review link below:

https://jaapwesselius.com/2013/02/03/lync-2013-and-exchange-2013-unified-messaging/

In control panel to assign UM Policy, navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Server Groups

Select **Assign UM Policy** from "options" column in front of the server group. A new tab **Exchange UM Polices** will open showing all the available policies.

Click **Edit Assignment** and assign to customer/resellers as required.

To activate on a user mailbox see also: Unified Messaging

PST Export/Import Settings

To manage PST export settings navigate to the following path:
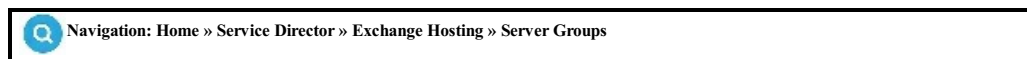
Select **PST Export/Import Settings** from **Options** column in front of a server group:

Important Note

Pre-requisites:

   a. 'Exchange Trusted Subsystem' group shall have read,write permission on UNC path for import/export.
   b. Control panel exchange server's service admin shall have read permission on UNC path for import.

PST Import Export Configuration

   1. **Server group:** It shows the Exchange Server Group.
   2. **Enabled:** Check box to enable PST export settings.
   3. **Base url for PST download link:** Provide base url for PST download for example: https://providersite/downloads/pst
   4. **UNC path for PST download:** Provide UNC path for pst download for example: \\webserver\site\pst
   5. **Maximum export jobs to be created in parallel on a server:** Provide maximum export jobs to be created from value 1 to 100.
   6. **Auto delete PST file from server after creation:** Provide no of Days to auto delete pst file from the server.
   7. **UNC path for import:** Provide UNC path for pst download for example: \\webserver\site\pst

Click **Save** when done.

Exchange Accounts

To view Exchange Accounts, navigate to the following path:
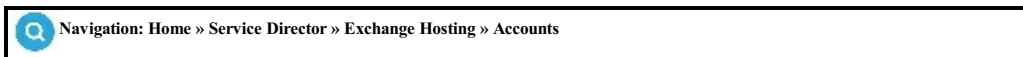
In order to Fix security permissions for all the organization, click on **Fix Security Permissions for all Organizations** button.

In order to Sync your all organization, click on **Sync data from backend for all Organizations** button. You can also Enable Litigation Hold for exchange accounts.

Click on **Manage** for any account to show options to manipulate and manage corresponding exchange account.

The list displays the following:

1. **Status:** It shows the status of account.
2. **Subsc.ID:** This is unique ID assigned to the subscriptions.
3. **Mail Domain:** The name of SMTP domain.
4. **Package:** It shows the name of package assigned.
5. **MailBoxes:** Total number of exchange mailboxes created in the organization.
6. **Customer:** It shows the customer name along with id.
7. **Owner:** It shows the name of owner.
8. **Options:** Click on **Manage** to manage exchange service.

Clicking on **Manage** of particular exchange server will allow to manage exchange service. You will be presented with **General Settings** tab initially that shows basic exchange service related information.

Settings (Exchange Accounts)

In order to enable settings for all exchange accounts navigate to the following path:
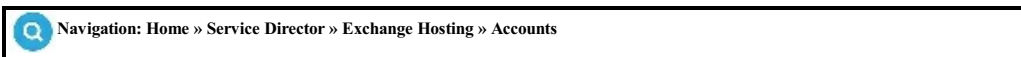
Select **Settings** tab.

### Default settings for all Organizations

1. Require that all senders are authenticated enabled for new Distribution List
2. Allow organization administrator to change Distribution List "Require that all senders are authenticated"
3. Allow Resellers to change Distribution List "Require that all senders are authenticated" for organizations"
4. Allow to add Linked mailbox.

Click **Save** when done.

Organization Settings:

You can **Add/Update Organization Settings** for selected organization as well.

Select Organizations and select from below:

1. Require that all senders are authenticated enabled for new Distribution List
2. Allow organization administrator to change Distribution List "Require that all senders are authenticated"
3. Allow to add Linked mailbox.

Click **Save** when done.

Viewing Exchange Organizations

Exchange organizations are basically mail enabled active directory organizations.

To view exchange organizations navigate to the following path:
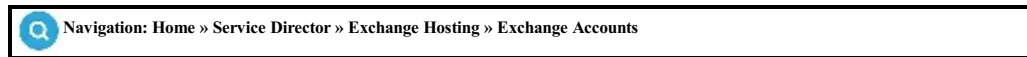
🔍 **Navigation: Home » Service Director » Exchange Hosting » Exchange Accounts**

Click on the **Subsc. ID** or **Mail Domain** name. Once you click the subscription name, you will be on following navigation path:

🔍 **Navigation: Home » Customer Manager » Subscription List » Subscription Detail**
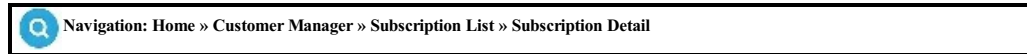
Select **Exchange Organizations** tab.

You can include new organizations by clicking on **Add New Organization** button. Click here to see how to add a new organization.

The list of exchange organization displays following:

1. **Status:** This shows the status of exchange hosting account.
2. **Mail Domain:** The primary SMTP mail domain name created for the organization.
3. **Organization Name:** It shows the name of Exchange Organization.
4. **MailBoxes:** Total number of exchange mailboxes created in the organization.
5. **Options:** You have option to Manage or Delete for desired organization.

Only the exchange organizations under the customer of logged in provider will be listed.

To view exchange organizations for customers under any reseller, you must login as that reseller.

Enable Litigation Hold

Organizations may need to preserve all email related to a specific topic or all email for certain individuals.

In order to enable litigation hold in bulk, navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Accounts
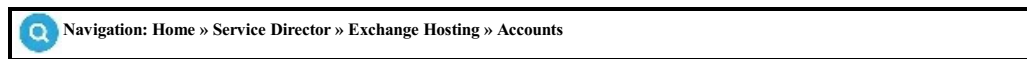
Select **Enable Litigation Hold** button for all Exchange Accounts and provide following:

1. **Organizations:** type to search an organization and select
2. **Enable litigation hold for all mailboxes within Organization:** Check if required.
3. **Litigation Hold Duration (days):** Provide number of days.
4. **Litigation Hold Date:** Select Starting date.

Click **Save** when done.

In order to Enable litigation Hold for selected Mailboxes under exchange **Accounts**, Click on **Manage** and then select **Compliance Management** tab. Now select **Litigation Hold** tab.

Note: Litigation hold is available for Enterprise and Enterprise Plus mailbox.

Click **Enable.**

1. **Mailboxes:** Select mailboxes from Selectable
2. **Litigation Hold Duration (days):** Provide number of days.
3. **Litigation Hold Date:** Select Starting date.

Click **Save** when done.

Allow Customers to Enable/Disable litigation Hold:

Enable litigation Hold is an enterprise feature. To allow **Customers/Resellers** to "Enable/Disable litigation Hold" on mailboxes, you can check/uncheck this option under "Exchange Service Plans" navigate to following path:

To create a hosted email plan navigate to following path:

Navigation: Home » Service Plans » Exchange
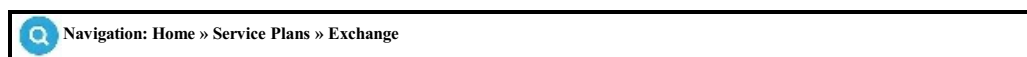
Under **Resources** tab you can check the option **Enable litigation Hold**.

Note: You can also edit existing hosted email plans by clicking on the **Edit** link. and **Sync sold plan resources.**

If this **Sync sold plan resources** checkbox is checked, product name, comments, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox settings.

Add New Organization

To add a new exchange organization, navigate to the following path:

> 🔍 **Navigation: Home » Service Director » Exchange Hosting » Exchange Accounts**
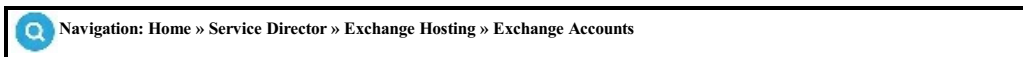
Click on the **Subsc. ID** or **Mail Domain** name. Once you click the subscription ID or Name, you will be on following navigation path:

> 🔍 **Navigation: Home » Customer Manager » Subscription List » Subscription Detail**

Select **Exchange Organizations** tab. Click the **Add New Organization** button.

The add new organization screen displays following:

1. **Add new Organization:** Usually you will select "Add new Organization" but in some cases you will be able to select an existing organization to mail enable. For example, if there is SharePoint enabled organization for same customer it would show in the list allowing you to enable hosted email service on it.
2. **Organization Name:** The active directory name of the organization. With the name an active directory organizational unit is created for the organization.
3. **Domain Name:** The primary SMTP mail domain name created for the organization.
4. **Address1**: Provide Address.
5. **City:** Provide the name of the city.
6. **State:** Provide the name of the state.
7. **Zip:** Provide the zip code.
8. **Country:** Provide the name of the country.
9. **Description:** Provide description of the organization.

Click on the **Save** button to create the organization.

Hosted Exchange Service Management

Orchestration Module for Microsoft Exchange activates rich web based interface for the management of hosted email service. Using the web interface the provider and the end-user may perform routine management task without the need of going at the exchange server or active directory.

To view exchange organizations navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** for any account to show options to manipulate and manage corresponding exchange account.

General Settings tab shows the Operations that could be performed on Exchange. Click on **Enable Migration** button to allow migration for the Public Folders from backend server. See Also Public Folders

You can also perform Export Mailbox Permissions, Sync Data from backend, Export Mailbox Forwarding and Update Recipient Limit for each exchange account.

Currently available management interfaces include:

1. Exchange Organizations Management
2. Exchange SMTP domains Management
3. Exchange Mailbox Management
4. Exchange Mail Contacts Management
5. Exchange Distribution lists Management
6. Exchange Public Folders Management
7. Exchange Wireless Service Management
8. Exchange Disclaimer Management
9. Compliance Management
10. Spam Filters Management
11. Mobile Device Mailbox Policy Management
12. Application Impersonation
13. Calendar Permissions

Enable Migration

Control panel can import all the public folders which are selected and exists on backend. To enable migration of Public Folders, navigate to the following path:
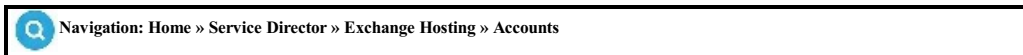
Click **Manage** in front of the organization under which you want to import public folders. Click **Enable Migration** button. After clicking on Enable migration tab go to the **Public Folders** tab. Here you will see the **Import** button under **Public Folders** tab.

Select Public folders to be imported and click on **Save** to complete the public folder import process.

Export Mailbox Permissions

Control panel can export mailbox permissions to excel sheet. To export mailbox permissions, navigate to the following path:

Click **Manage** in front of the organization under which you want to export mailbox permissions. Click **Export Mailbox Permissions** button.

Sync Data from backend

Sync from backend is there to sync data from backend for an organization where you have created new mailboxes or other object directly on backend for an organization that exists in control panel. This operation will add those mailboxes/objects into Control Panel, however if you delete a mailbox directly from backend and use Sync operation, the mailbox will not get cleared from the control panel since it's a one way process to add items to control panel, not delete them based on changes in backend.

To sync data from backend, navigate to the following path:
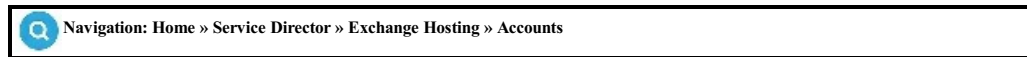
Click **Manage** in front of the organization for which you want to sync data from backend. Click **Sync Data from backend** button. After clicking on Sync data from backend it will ask following confirmation message.

All Mailbox (es), Contact(s) and Distribution List(s) will be synchronized with backend. Data that exist on backend but not already showing in Panel will be added. Subscription Resources will need to be adjusted manually once sync operation completes. Are you sure you want to continue?

Click **Yes** to proceed.

Only following operations will be synced from backend:

1. Mailboxes:
    a. Import new mailbox in DB if it is not already there. Supports all mailbox types (User, Linked, Resource)
    b. Sync General settings
    c. Sync Email addresses
    d. Sync Mail-flow settings
    e. Sync Advanced settings
    f. Sync Permissions
    g. Sync Mailbox Database
    h. Sync Personal Archive settings
    i. Sync Unified Messaging
    j. Sync Automatic replies
    k. Sync Retention enabled
2. Distribution List(s)
    a. Import new Distribution list in DB if it is not already there. Supports all Distribution List types (Simple, Dynamic, Security, Room)
    b. Sync Distribution List members
    c. Sync Email addresses
    d. Sync Advanced settings
    e. Sync Send-As settings
3. Mail Contacts
    a. Import new Mail Contact in DB if it is not already there.
    b. Sync General settings
    c. Sync Mail-flow settings
    d. Sync disabled attribute

Export Mailbox Forwarding
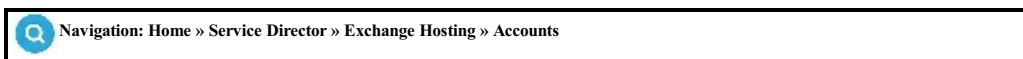
Control panel can export mailbox forwarding to excel sheet. To export mailbox forwarding, navigate to the following path:

Click **Manage** in front of the organization under which you want to export mailbox forwarding. Click **Export Mailbox Forwarding** button.
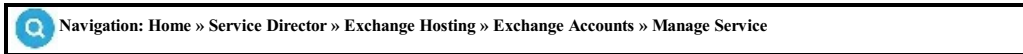
Update Recipient Settings

Control panel can update recipient settings. To update recipient settings, navigate to the following path:

🔍 **Navigation: Home » Service Director » Exchange Hosting » Accounts**

Click **Manage** in front of the organization under which you want to export mailbox permissions. Click **Update recipient settings** button.

A new tab will open under following path:

🔍 **Navigation: Home » Service Director » Exchange Hosting » Exchange Accounts » Manage Service**

Import settings

1. **Select mailboxes data file:** Select file
2. **Select distribution lists data file:** Select file
3. **Select mail contacts data file:** Select file
4. **Auto create new recipient when not found:** Check box

Click **Save** when done.

Viewing Exchange Domains

Exchange mail domains are accepted SMTP domains which are allowed to send and receive emails. To view exchange mail domains navigate to the following path:

Click on **Manage** and then select **Exchange Mail Domains** tab.

The list of exchange mail domains displays following:

1. **Mail Domain:** This shows the name of SMTP domain. Click on the domain name.
2. **Domain:** For example customerdomain.com. You can also set it default.
3. **Type:** Select the type of the domain from the drop down list such as Authoritative, internal relay or external relay. Then click on **Save** button.
4. **Default:** The default mail domain is selected by default when creating a new mailbox.
5. **Delete:** Click to delete the domain from accepted SMTP domains list in exchange.

Add SMTP Domain

To add an SMTP domain navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Accounts
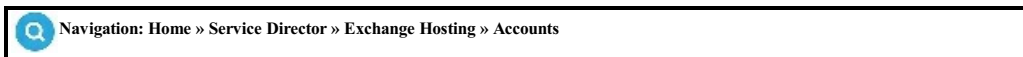
Click on **Manage** and then select **Mail Domains** tab. Enter the new SMTP domain name in **Add new SMTP domain** box and click on **Add New Domain** button.

Delete SMTP Domain

To delete an SMTP domain navigate to the following path:

Click on **Manage** and then select **Mail Domains** tab. Click on the **Delete** button in front of SMTP domain which you wish to delete.

Viewing Mailboxes

Mailboxes are mail addresses which are used to send and receive emails. To view mailboxes navigate to the following path:

Click on the **Manage** and then select **MailBoxes** tab.

You can add new mailbox by clicking on the Add New Mailbox button or you can add bulk mailboxes by clicking on **Add Bulk Mailbox** and **Add Bulk Linked Mailbox** button. You can perform group actions on the mailboxes by clicking on the **Group Actions** button. You can also remove an export bulk failed mailboxes by clicking on **Remove and Export Bulk Failed Mailboxes**.

The list of mail boxes displays following:

1. **Display name:** The mail box name such as Room Mailbox.
2. **User Principal Name:** The domain user name for this mailbox as it displays in OWA and in from address when sending mail.
3. **Email:** The email address for the mailbox.
4. **Disk Space Allowed:** Total mailbox size in Kilobytes.
5. **Status:** Only Active mailboxes can send and receive mails.
6. **Options:** It shows the following two options:
    i. **Disable:** Click this button to disconnect the mailbox.
    ii. **Remove:** Click to delete the mailbox from exchange.
    iii. **Remove and Delete AD user:** This option will remove the mailbox from exchange as well as AD user.
    iv. **PST Export:** This will export mailbox to PST.

Note: To view and manage more details and features of the mailboxes click on the mailbox display name.

Add User Mailbox

Mailboxes are mail addresses which are used to send and receive emails. To add a new mailbox navigate to the following path:

> 🔍 **Navigation: Home » Service Director » Exchange Hosting » Accounts**
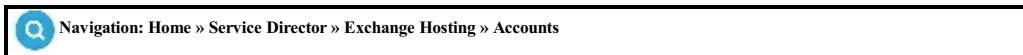
Click on the **Manage** and then select **Mail Boxes** tab. Click on the **Add New Mailbox** button.

Select one of the following Mailbox:

1. **User mailbox:** Most common type of mailbox should be selected commonly.
2. **Linked mailbox:** Linked mailboxes are mailboxes that are accessed by users in a separate, trusted forest. Linked mailboxes may be necessary for organizations that deploy Exchange in a resource forest. Click here to add a Linked mailbox.
3. **Room mailbox:** Special type of mailbox for reserving rooms etc. Click here to add a room mailbox.
4. **Equipment mailbox:** Special type of mailbox for equipment. Click here to add a equipment mailbox.
5. **Shared mailbox:** Special type of mailbox for Exchange 2013 or later. Click here to add a shared mailbox.

The add mailbox screen displays following:

1. **Mailbox Template:** Select Mailbox template from the dropdown.
2. **Mail enable active directory user:** Exchange user for which you want to enable the service.
3. **Full Name (Display name):** The mail box name as it displays in OWA and in from address when sending mail.
4. **Primary Email:** The email address for the mailbox. For example, sales.
5. **Mailbox Type:** It shows the type of mailbox selected.
6. **Password:** Enter the password you would like to set for this mailbox. See Also: Add Password Policy
7. **Full Access (Auto-Mapping Enabled):** Assign permissions to mailboxes on this user.
8. **Full Access (Auto-Mapping Disabled):** Assign permissions to mailboxes on this user.
9. **Send On Behalf:** Assign permissions to mailboxes on this user.
10. **Send As:** Assign permissions to mailboxes on this user.
11. **Mailbox Database:** You can select Mailbox database from the dropdown list.
12. **Mailbox Size (in MB):** This will be show if you select **Custom** mailbox template. You can either select package/Addon defined or Custom. In case of "Custom" provide below storage limits:
    i. **Issue warning at (MB):** Provide MB's to issue warning.
    ii. **Prohibit send at (MB):** Provide MB's to prohibit send at.
    iii. **Prohibit send and receive at (MB):** Provide MB's to prohibit send and receive at.
13. **Language:** Select locale of the mailbox.
14. **Time Zone:** Select Time zone.
15. **Alternate email:** Specify alternate email.
16. **Hide from Exchange Address List:** Click this check box if you wish to hide the email account from Global Access List (GAL).

Optional Fields: Optional fields may be left blank and filled later.

Distribution List membership: Select the distribution list for members.

Send setup Email: Check the option for Send Email if you want to send an Email.

Click on the **Add Mail Box** button when done.

Linked Mailbox

To add a linked mailbox navigate to the following path:

Click on **Manage** and then select **Mailboxes** tab. Click on the **Add new mailbox** button to add a new mailbox.

1. **Mail-enable active directory user:** Select the existing user or create the new one.
2. **Mailbox database:** Select mailbox database from the drop down list.
3. **Mailbox Size (in MB):** Provide mailbox size in MB.
4. **Full Name (Display name):** Provide the display name of the mailbox.
5. **Primary email:** Provide email address for the account.
6. **Mailbox type:** Select mailbox type **Linked Mailbox**.
7. **Linked domain controller:** Select a domain controller in the account forest. Exchange will connect to this domain controller to retrieve the list of user accounts in the account forest so that you can select the linked master account.
8. **Linked master account:** Select a user account in the account forest, and then click OK. The new linked mailbox will be associated with this account.
9. **Linked domain administrator login:** Provide administrator login.
10. **Linked domain administrator password:** Provide password.
11. **Confirm password:** Retype password.
12. **Hide from Exchange Address Lists:** Check this option if you want to hide it from the exchange address list.

Click on the **Add Mail Box** button when done.

Room/Equipment Mailbox

To add a room/equipment mailbox navigate to the following path:

Click on the **Manage** and then select **Mailboxes** tab. Click on the **Add new mailbox** button to add a new mailbox.

1. **Mail-enable active directory user:** elect the Existing user or create the new one.
2. **Mailbox database:** Select Mailbox Database from the drop down list
3. **Mailbox Size (in MB):** Provide mailbox size in MB.
4. **Full Name (Display name):** Provide the display name of the mailbox.
5. **Primary email:** Provide email address for the account.
6. **Mailbox type:** Select mailbox type **Room Mailbox / Equipment Mailbox.**
7. **Managed By:** Select the user for the management of the mailbox.
8. **Hide from Exchange Address Lists:** Check this option if you want to hide it from the exchange address list.

Click on the **Add Mail Box** button when done.

Add Shared Mailbox

Mailboxes are mail addresses which are used to send and receive emails. To add a new shared mailbox navigate to the following path:

Click on the **Manage** and then select **Mail Boxes** tab. Click on the **Add New Mailbox** button.

Now select **Shared Mailbox**.

The add mailbox screen displays following:

1. **Mail enable active directory user:** Exchange user for which you want to enable the service.
2. **Full Name (Display name):** The mail box name as it displays in OWA and in from address when sending mail.
3. **Primary Email:** The email address for the mailbox. For example, sales.
4. **Mailbox Type:** It shows the type of mailbox selected.
5. **Full Access (Auto-Mapping Enabled):** Assign permissions to mailboxes on this user.
6. **Full Access (Auto-Mapping Disabled):** Assign permissions to mailboxes on this user.
7. **Send On Behalf:** Assign permissions to mailboxes on this user.
8. **Send As:** Assign permissions to mailboxes on this user.
9. **Mailbox Database:** You can select Mailbox database from the dropdown list.
10. **Mailbox Size (in MB):** This will be show if you select **Custom** mailbox template. You can either select package/Addon defined or Custom. In case of "Custom" provide below storage limits:
    i. **Issue warning at (MB):** Provide MB's to issue warning.
    ii. **Prohibit send at (MB):** Provide MB's to prohibit send at.
    iii. **Prohibit send and receive at (MB):** Provide MB's to prohibit send and receive at.
11. **Language:** Select locale of the mailbox.
12. **Time Zone:** Select Time zone.
13. **Alternate email:** Specify alternate email.
14. **Hide from Exchange Address List:** Click this check box if you wish to hide the email account from Global Access List (GAL).

Distribution List membership:

Select the distribution list for members.

Click on the **Add MailBox** button when done.

Group Actions

To add a group actions for mailboxes navigate to the following path:

Click on the **Manage** and then select **Mailboxes** tab. Click on the **Group Actions** button.

The Group Actions screen displays following:

1. **Mailboxes:** Select the mailboxes for which you want perform Group Actions.
2. **Operations:** You can perform the following Group Actions here.
    i. Disable Archive
    ii. Disable
    iii. Enable Delete
    iv. Enable Litigation Hold
    v. Disable Litigation Hold
3. **General Settings:** The following are the general setting for the mailboxes.
4. **Hide from Exchange Address Lists:** Check this option to hide user from Exchange address list and then save it.
5. **Language:** Select the Locale of the mailbox user.
6. **Mailflow Settings:** Set the mail-flow settings for the selected mailboxes.
7. **Storage Quotas:** Define the storage quotas for the selected mailboxes.
8. **Mailbox Features:** Define the mailbox and the OWA features of the selected mailboxes.
9. **Distribution Members List:** Select the mailboxes for the distribution members list.
10. **Add Email Alias:** Provide the email alias for the selected mailboxes.
11. **Personal Archive Settings:** Provide the personal archive settings for the selected mailboxes.

Purchase More Resources

When adding a new user (Exchange, SharePoint, CRM, Skype4B) if you get a pop up:

Following Resource(s) exceeds the maximum allowed limit. **Purchase More**

To define **Purchase More**, navigate to following path:

> 🔍 **Navigation: Home » System Configuration » Company Profile**

Select **Personalization** tab. Provide "URL to purchase more resources when quota limit is reached".

URL to purchase more resources direct from the management interfaces where the existing resources reach their limit:

1. If the configurable field is left blank, Control Panel will redirect to the offline order form and if any associated Addon is available for sale, it will get selected to be sold.
2. The functionality will be available on both client and provider/reseller side with extra permission for client to be able to purchase via offline order form. If external link is provided, it will be available without any permission from client side also.
3. Functionality is implemented in Exchange, SharePoint, CRM and Skype4B.

Providers can also direct change resources for existing subscriptions without purchasing more resources in order to avoid the hassle upgrade of service plan and selling of addons. This will not involve billing.

Edit Resources

Navigating to the following path and clicking on the subscription name you wish to check details of.

> 🔍 **Navigation: Home » Customer Manager » Subscription List**

Once you click the subscription name, you will be on following navigation path:

> 🔍 **Navigation: Home » Customer Manager » Subscription List » Subscription Detail**

You will be able to view details of the subscription you have clicked.

Select **Resources** tab and click **Edit Resources** and make the desired changes.

Increase the Addon Quantity

If you are using a basic plan with zero resources and use Addons to sell more users/resources as per requirement. You can increase the quantity of addon directly.

Navigating to the following path and clicking on the subscription name you wish to check details of.

> 🔍 **Navigation: Home » Customer Manager » Subscription List**

Once you click the subscription name, you will be on following navigation path:

> 🔍 **Navigation: Home » Customer Manager » Subscription List » Subscription Detail**

Select the **Add-ons** tab. Click on the name of addon and **Edit Quantity**. You can either increase or decrease the number of addons.

To buy a new Add-on click **Buy Add-on**.

Mailbox Settings

To view and manage mailbox settings navigate to the following path:
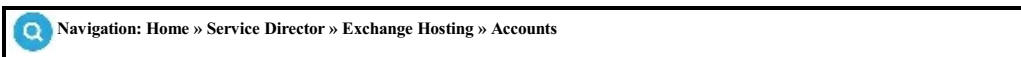
Click on **Manage** and then select **Mailboxes** tab. Click on the mailbox display name for which you wish to manage mailbox settings and features:

You will see the followings tabs:

1. General Settings
2. Email Addresses
3. Mailbox Database
4. Mail Flow Settings
5. Advanced Storage Quotas, Mail box Features.
6. Permissions
7. Wireless Service
8. Set Password
9. Personal Archive Settings
10. Unified Messaging
11. Automatic Replies
12. Distribution List Membership
13. Journaling
14. Calendar Permissions
15. Mobile Devices
16. In-Place Hold

General

To view and manage general settings of a mailbox navigate to the following path:

Click on **Manage** and then select **MailBoxes** tab. Click on the mailbox name for which you wish to set it general settings as below:

General Settings:

1. **Select template:** You can select mailbox template here. See Also: [Create Mailbox Template](), [Assign Mailbox templates]() and Custom Mailbox Template.
2. **User:** Provide or change user principal name. You can also convert User mailboxes to Shared, Room, Equipment, Linked mailbox and vice versa.
3. **Domain User name:** It sows the domain user name for e.g. test-lab2024
4. **Display name:** It shows the users display name.
5. **Mailbox type:** It shows the mailbox type for e.g. Room Mailbox
6. **Managed By:** Select the mailbox type.
7. **Hide from Exchange Address Lists:** Check or uncheck it.

Contact Information:

1. **Initials:** Provide initials if any.
2. **First Name:** Provide first name of the user.
3. **Last Name:** Provide last name of the user.
4. **Address:** Provide the address of the user.
5. **City:** Provide the name of the city.
6. **Zip/Postal Code:** Provide the zip/postal code.
7. **Business phone:** Provide phone number.
8. **Fax:** Provide fax number.
9. **Home phone:** Provide home phone number.
10. **Mobile phone:** Provide mobile phone number.
11. **Pager:** Provider pager.
12. **Web Page:** Provide web page if any.

Organization:

1. **Job title:** Provide the job title.
2. **Company name:** Provide the company name.
3. **Department:** Provide the department name.
4. **Office:** Provide the name of the office.

Click **Save** when done.

Add Email Addresses

A mailbox can have multiple email addresses or aliases. This allows the mail box to receive messages that are addressed to any one of these e-mail addresses.

To add a new email address to a mailbox navigate to the following path:
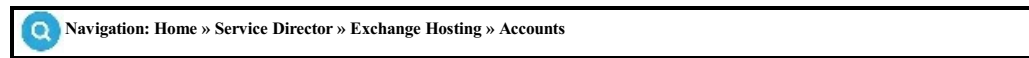
Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **Mailboxes** tab. Click on the mailbox name for which you wish to add email address. Select **Email Address** tab, enter the desired value in **Email Address** box and click on **Add** button.

Add Mailbox Database

To manage Mailbox Database navigate to the following path:

Click on **Manage** and then select **MailBoxes** tab. Click on the mailbox name for which you wish to add database. Click on the **Mailbox Database** tab.

Select **Mailbox Database** from the drop down list and then click on **Save** button.

Set Email Forwarding

A mailbox can have multiple email addresses or aliases for a specific address type. This allows the mail box to receive messages that are addressed to any one of these e-mail addresses.

To set forwarding on a mailbox navigate to the following path:

Click on **Manage** and then select **MailBoxes** tab. Click on the mailbox name for which you wish set mail forwarding. Click on the **Mail Flow Settings** tab and enable the **Enable email forwarding** checkbox. Enter the address where mail shall forward in **Forward to** box and click **Save** button.

If you wish to keep a copy of email in the mailbox then enable the **Deliver message to forwarding address and mailbox** checkbox also.

You can also apply limits.

1. **Recipient limit:** Provide limit or check Unlimited.
2. **Max sending message size limit (MB):** Provide limit or check Unlimited.
3. **Max receiving size limit (MB):** Provide limit or check Unlimited.

You can also provide delete item retention in days.

The Restrictions displays following:

Accept Message From: There are two options to select from:

a. **All senders:** If selected, message will be accepted from any sender.
b. **Only senders in the following list:** If you selected, the message will be accepted only from the addresses selected from the list.

Reject Message From: There are two options to select from:

a. **No senders:** If selected, message will never be rejected.
b. **Senders in the following list:** If you selected, the message will be rejected if coming from the addresses selected from the list.

Click on **Save** button when done.

Advanced

When a mailbox is first created it inherits the OWA and Service Access (POP/SMTP/IMAP) from the service plan assigned to exchange organization. In some cased you may want to change service features for individual mailboxes. You may do this easily via web interface.

To change storage & mailbox quotas navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **MailBoxes** tab. Click on the mailbox name for which you wish manage the service features. Now, click on the **Advanced** tabs to set various OWA and POP/IMAP/SMTP options.

Note: When using Mailbox templates the Advanced tab will be hidden except for "Custom" Mailbox template.

Permissions

To change permissions on mailboxes navigate to the following path:
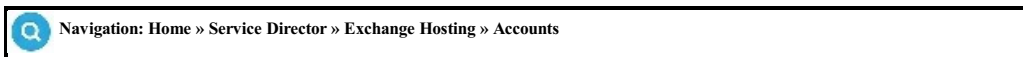
Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **MailBoxes** tab. Click on the mailbox name for which you wish manage the service features.

Select **Permissions** tab. Here you will see the three permissions of sending emails:

1. **Send on Behalf:** Granting the Send on Behalf permission to other recipients allows those recipients to send e-mail messages on behalf of a mailbox user. Specifically, recipients who are granted this permission can enter the mailbox user's name in the from field for the messages that they send
2. **Send As:** Use Send As permissions to configure a mailbox so that users other than the mailbox owner can use that mailbox to send messages. After this permission is granted, any messages that are sent from the mailbox will appear as if they were sent by the mailbox owner.
3. **Full Access:** Allows the delegate to open the mailbox, and view, add and remove the contents of the mailbox. Doesn't allow the delegate to send messages from the mailbox.

Select mailbox from the drop down list and then click on **Grant Send On Behalf, Grant Send As and Grant Full Access** button.

Manage Wireless Service

To manage wireless account navigate to the following path:
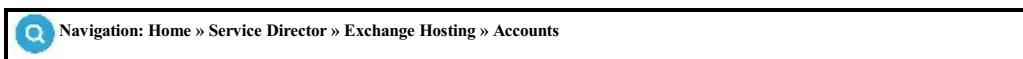
Click on **Manage** and select **Mailboxes** tab. You will be able to perform following operations when **Wireless Service** button is clicked. And select **Wireless Service** tab. To deactivate wireless account click on **Deactivate Wireless** button. You can manage following wireless device options and perform device activation:

You can also view wireless device and device activity.

Device Options

1. Clear Statistics
2. Wipe device
3. Resend Service Book

Device Activation

1. Specify an Activation Password
2. Generate an Activation Email
3. Clear Activation Password

Change Mailbox Password

To change a new mailbox password navigate to the following path:

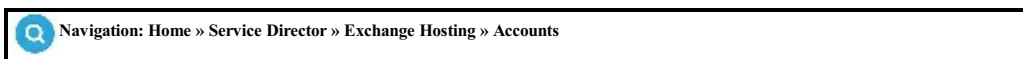Click on **Manage** and then select **Mailboxes** tab. Click on the mailbox name for which you wish to change the password. Select **General** tab and enter the new password in **New Password** box. Click **Set Password** button to set the new password.

Personal Archive Settings

To view and manage personal archive settings navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **MailBoxes** tab. Click on the mailbox name for which you wish to set archive settings. Click on the **Personal Archive Settings** tab. You will see the following options:

1. **Enabled:** Check it if you want it to enable.
2. **Personal archive database:** Select personal archive database.
3. **Warning Quota (MB):** Provide warning quota in MB or check unlimited.
4. **Quota (MB):** Provide quota in MB or check unlimited.

Then click on **Save** button.

Unified Messaging

To enable unified messaging on mailboxes navigate to the following path:

Click on **Manage** and then select **Mailboxes** tab. Click on the mailbox name for which you wish manage the service features. Now select **Unified Messaging** tab and click on **Activate** button.

1. **Policy Name:** Provide policy Name
2. **Extension:** It shows extension
3. **SIP identifier:** It shows SIP identifier for e.g. MB1.test@exdomain.com
4. **Enable for Automatic Speech Recognition:** Check/Uncheck
5. **Allow UM calls from non-users:** Check/Uncheck
6. **Allow the user to receive faxes:** Check/Uncheck
7. **Allow diverted calls without a caller ID to leave a message:** Check/Uncheck
8. **Allow user to configure call answering rules:** Check/Uncheck
9. **Personal operator extension:** It shows extension.

You can also **Disable** UM or **Reset Pin**:

1. **Automatically generate PIN to access Outlook Voice Access:** Select this option for automatic pin.
2. **Manually specify PIN:** select this to specify manual pin.

Require user to reset PIN at first telephone logon: Check/ Uncheck this option .

Automatic Replies

To enable automatic replies on mailboxes navigate to the following path:
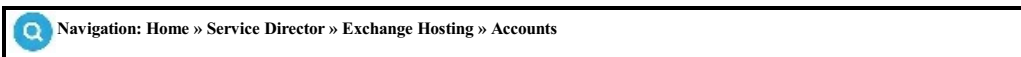
Click on **Manage** and then select **MailBoxes** tab. Click on the mailbox name for which you wish manage the service features. Now select **Automatic Replies** tab and check the enabled box, and provide the details as below:

1. **Send replies only during this time period:** When this box is checked you can select the start and end time for you Automatic reply.
    a. Start time
    b. End time
2. **Send a reply once to each sender inside my organization with the following message:** Type your message here.
3. **Send automatic reply messages to senders outside my organization:** When this box is checked, you can select on of the following option:
    a. Send replies only to senders in my Contacts list
    b. Send replies to all external senders
4. **Send a reply once to each sender outside my organization with the following message:** Type your message here.

Click **Save** button when done.

Distribution list member ship

To allow distribution list membership on DL's navigate to the following path:

Click on **Manage** and then select **MailBoxes** tab. Click on the mailbox name for which you wish manage the service features. Now select **Distribution List Membership** tab, select Distribution lists from the list box and click on **Save** button.

Calendar Permissions

To manage calendar permissions of a mailbox navigate to the following path:

Click on **Manage** and then select **Mailboxes** tab. Select mailboxes for which you wish to enable and manage calendar permissions.

1. **Member:** Select member/mailbox
2. **Permission Level:** Select Permissions.
     i. Create Items
    ii. Folder Owner
   iii. Read Items
    iv. Folder Contact
     v. Create SubFolders
    vi. Folder Visible
   vii. Edit Own
  viii. Delete Own
    ix. Edit All
     x. Delete All

Click **Save** when done.

Mobile Devices

To manage mobiles devices of a mailbox navigate to the following path:

Click on **Manage** and then select **MailBoxes** tab. Click on the mailbox name for which you wish to manage Mobile Devices.

Allow Customers to Enable/Disable Mobile device management:

To allow/disallow Mobile device Policy Management for Customers/Resellers, you can check/uncheck "Mobile Device Policy Management allowed" under "Exchange Service Plans".

To create a hosted email plan navigate to following path:

Under **Resources** tab and check option **Mobile device management allowed**.

Note: You can also edit existing hosted email plans by clicking on the **Edit** and **Sync sold plan resources.**

If this **Sync sold plan resources** checkbox is checked, product name, comments, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox settings.

Viewing Mail Contacts

Mail contacts are listed in exchange Global Address List (GAL) and visible in OWA. Click on the mail contact name to manage advanced properties. When a mail contact is disabled it no longer shows in GAL.

To view mail contacts navigate to the following path:

Click on **Manage** and then select **Mail Contacts** tab. You can **Add Mail Contact** and **Add Bulk Mail Contact**.

The list of mail contacts displays following:

1. **Display name:** The mail box name as it displays in Global Address List (GAL).
2. **External Email:** The email address for the emails for this mail contact are delivered.
3. **Status:** Only Active mailboxes can send and receive mails.
4. **Delete:** Click to delete the mail contact from exchange and active directory.

Note: you can also add bulk mail contacts by importing contact in csv file.

Mail Contact

Mail contacts are mail-enabled directory service objects that contain information about people or organizations that exist outside your Exchange or Exchange Online organization. Each mail contact has an external email address.

Add Mail Contact

To add mail contact navigate to the following path:

> 🔍 **Navigation: Home » Service Director » Exchange Hosting » Accounts**

Click on **Manage** and then select **Mail Contacts** tab. Click on the **Add Mail Contact** button.

The add mail contact screen displays following:

1. **Display name:** The mail box contact name as it displays in OWA.
2. **External Email:** The external email address where mails for this contact shall deliver.
3. **Internal Email:** For each external email address there is an SMTP email created in exchange. Enter the SMTP email address name you would like to create for this mail contact.
4. **SIP Address:** Provide SIP address of contact.
5. **Phone Number:** Provide phone number of contact.
6. **Hide from Exchange Address List:** Click this checkbox if you wish to hide the email account from Global Access List (GAL).
7. **Optional Fields:** Optional fields may be left blank and filled later.

Click on the **Add Mail Contact** button when done.

Add Bulk Mail Contact

Click on **Add Bulk Mail Contact** button to add bulk contact.

- Browse for CSV file to import all the mail contacts.

Click **Add Bulk Mail Contact** button when done.

Delete Mail Contact

To delete a mail contact navigate to the following path:

Click on **Manage** and then select **Mail Contacts** tab. Click on the **Delete** button in front of mail contact you wish to delete.

Disable Mail Contact

To disable a mail contact, navigate to the following path:

Click on **Manage** and then select **Mail Contacts** tab. Click on the **Disable** button in front of mail contact you wish to disable.

Viewing Distribution Lists

Distribution lists are group of mailboxes for easy mail distribution. For example, you may create a 'sales' distribution list, add mailboxes to it and then use sales distribution list to send single email which is distributed among all the member mail boxes.

To view distribution lists navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **Distribution List** tab.

You can **Add Distribution List**, **Add Bulk Distribution Lists**, **Export Dynamic Distribution List**, **Export to Excel** all DL's, perform **Group Actions** and get **Members Report** to excel sheet.

The list of distribution lists displays following:

1. **Display Name:** The name of distribution list as it appears in mail from address.
2. **Email:** The email address for the distribution list. Any email message sent to this email is distributed among the list members.
3. **List Members:** Shows current number of list members.
4. **Delete:** Click to delete the distribution list.

You can **Edit** existing DL by clicking on Distribution List name.

Group Actions for Distribution List

To view Group Actions navigate to the following path:

Select **Distribution List** tab. Click on the **Group Actions** button to show options to manipulate and manage groups actions for distribution lists.

The list displays the following:

Click on plus sign to expand and select required group operation on distribution Lists.

1. **General Settings**
    i. **Hide from Exchange Address Lists:** Checkbox
    ii. **Send out-of-office message to originator:** Checkbox
    iii. **Delivery reports**
        a. Send delivery reports to group manager
        b. Send delivery reports to message originator
        c. Do not send delivery reports
    iv. **Limits**
        ▪ Maximum receiving message size (MB)
    v. **Membership Approval**
        a. Member Join Restriction
        b. Member Leave Restriction
2. **Restrictions**
    i. Require that all senders are authenticated
    ii. Accept message from
        a. All senders
        b. Only senders in the following list
    iii. **Reject message from**
        a. No Senders
        b. Senders in the following list.
3. **Managed By**
    ○ Managed by (Dynamics and other DL.)
4. **Add List Members**
5. **Remove List Members**
6. **Grant Permissions**
    i. Send As
    ii. Send On Behalf
7. **Remove Permissions**
8. **Message Approval**
   i. Group Moderators
    ii. Senders who don't require message approval
    iii. Select moderation notifications

Distribution List

A distribution list is a group of mail recipients that is addressed as a single recipient. Distribution lists are used to send e-mail to groups of people without having to enter each recipient's individual address.

Add Distribution List

To add a distribution list navigate to the following path:

> 🔍 **Navigation: Home » Service Director » Exchange Hosting » Accounts**
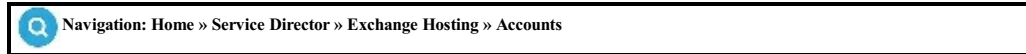
Click on **Manage** and then select **Distribution List** tab.

1. **Type:** Select type of the distribution List.
2. **Display Name:** Enter the distribution list name in **Display Name** Box.
3. **Primary Email:** Enter primary email address.
4. **Require that all senders are authenticated:** Checkbox to select.
5. **Managed By:** Select manager.
6. **Group Member:** Select DL members.

 and click **Save** button.

Add Bulk Distribution Lists

To add bulk distribution list click on **Add Bulk Distribution List** button.

1. **Primary Email:** Enter primary email address.
2. **Require that all senders are authenticated:** checkbox to select.
3. **csv file to import:** Browse to select a csv file.

Click on **Add Bulk Distribution List** button when done.

Export Dynamic Distribution list

You can export Dynamic Distribution list.

Group Actions

Click on **Group Actions** and select distribution list(s) for group operations/jobs. Following are the group operations that can be performed via control panel.

1. General Settings
2. Restrictions
3. Managed By
4. Add List Members
5. Remove List Members
6. Grant Permissions
7. Remove Permissions
8. Message Approval

Click **Save** when done.

Add Member to Distribution List

Distribution list members receives the email sent to the distribution list. They can also post email message to the list.

To add a distribution list member navigate to the following path:

Navigation: **Home » Service Director » Exchange Hosting » Accounts**

Click on **Manage** and then select **Distribution List** tab. Select the distribution list for which you wish to add a new member. Click on the **List Members** tab and select the list member from **Mailbox** drop-down list. Click the **Add** button.

If Mailbox drop-down is empty then either all available mailboxes are already list member or there is no mailbox created. To create a new mailbox, see Add Mailbox section.

Add New Mail Address

A distribution list can have multiple email addresses or aliases. This allows the distribution list to receive messages that are addressed to any one of these e-mail addresses.

To add a new email address to a distribution list navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **Distribution List** tab. Click on the distribution list name for which you wish to add email address.

Select **Email Address** tab. Select **Type** of the Email Address.

1. For **SMTP:** Enter the name of new mail address in Email Address.
2. For **Custom**: Enter the Custom address type and Email Address.

Click on **Add Email address** button.

Set Mail Restrictions

You may define *Accept Message From* and *Restrict Message From* settings for the distribution list.

To set restriction to a distribution list navigate to the following path:
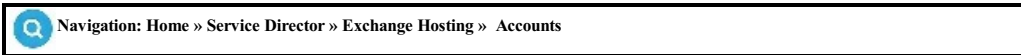
Click on **Manage** and then select **Distribution List** tab. Click on the distribution list name for which you wish to add email address and select **Advanced** tab.

The advanced interface displays following:

General Settings

1. **Display Name:** Type the name of Distribution list.
2. **Managed By:** Select manager of DL.

Restriction

Accept Message From: There are two options to select from:

1. **All senders**: If selected, message will be accepted from any sender.
2. **Only senders in the following list:** If you selected, the message will be accepted only from the addresses selected from the list.

Reject Message From: There are two options to select from:

1. **No senders:** If selected, message will never be rejected.
2. **senders in the following list:** If you selected, the message will be rejected if coming from the addresses selected from the list.

Delivery Reports

1. Send delivery reports to group manager
2. Send delivery reports to message originator
3. Do not send delivery reports

Limits

- **Maximum receiving message size (MB):** Select unlimited or provide value in MB.

Other

1. **Hide from Exchange Address Lists:** Checkbox.
2. **Send out-of-office message to originator:** Checkbox.

Membership Approval

Use this section to specify whether approval is required for users to join or leave the group.

1. **Member Join Restriction:** Choose whether owner approval is required to join the group.   Select one of the following settings:
    a. **Open:** Anyone can join this group without being approved by the group owners
    b. **Closed:** Members can be added only by the group owners. All requests to join will be rejected automatically
    c. **Owner Approval:** All requests are approved or rejected by the group owners   If you select this option, the group owner or owners receive an email requesting approval to join the group.
2. **Member Leave Restriction:** Choose whether the group is open to leave. Select one of the following settings:
    a. **Open:** Anyone can leave this group without being approved by the group owners.
    b. **Closed:** Members can be removed only by the group owners. All requests to leave will be rejected automatically

Send As

Distribution list members receives the email sent to the distribution list. They can also post email message to the list.

To grant send as to a distribution list member navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Accounts
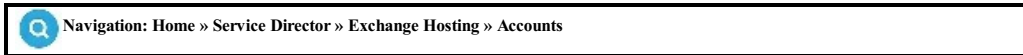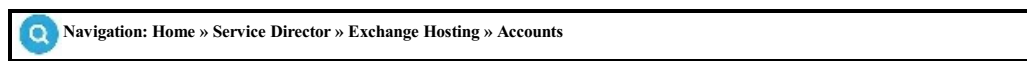
Click on **Manage** and then select **Distribution List** tab. Select the distribution list for which you wish to add a new member. Click on **Send As** tab and select the list member from **Mailbox** drop-down list. Click the **Grant Send As** button.

Send On Behalf

Distribution list members receives the email sent to the distribution list. They can also post email message to the list.

To grant Send On Behalf to a distribution list member navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **Distribution List** tab. Select the distribution list for which you wish to add a new member. Click on **Send On Behalf** tab and select the list member from **Mailbox** drop-down list. Click the **Save** button.

Message Approval

Message approval allows you to restrict whether messages sent to your central distribution list needs to be approved before they are sent out.

To grant message approval to a distribution list member navigate to the following path:

Click on **Manage** and then select **Distribution List** tab. Select the distribution list for which you wish to add a new member.

Click on **Message Approval** tab. Checkbox "Messages sent to this group have to be approved by a moderator". Further modifications can then be made using the option fields in the individual sections:

1. **Group Moderators:** Allows a selection of different people other than the owner to be able to allow or reject messages sent to the list. By default the owners will receive messages requiring approval. To change group moderators click on the add or remove buttons in the Group moderators section
2. **Senders who don't require message approval:** Allows certain email address to be able to send to the list without requiring approval. To change which senders don't need approval to send emails to the list click on the add or remove buttons in the Senders who don't require message approval section.
3. **Select moderation notifications:** You can set how senders are notified that the messages sent to the list have not been approved.
    i. Notify all senders when their messages aren't approved is selected.
    ii. Notify senders in your organization when their messages aren't approved
    iii. Don't notify anyone when a message isn't approved.

Click the **Save** button.

Viewing Public folders

Public folders are designed for shared access and provide an easy and effective way to collect, organize, and share information with other people in your work group or organization.

To view Public Folders navigate to the following path:

Click on **Manage** and then select **Public Folders** tab. To create a new Public Folder click on **Add Public Folder** button.

Migrate Public Folders

When Migration is enable on General Settings, you will see **Import** button. To migrate Public Folders from Exchange server click **Enable Migration**.

Manage Public Folders

It shows the following listings:

1. **Public Folder name:** It shows the public folder name. Click on folder name to manage public folders.
2. **Options:** You can delete the folder.

Mail Enabled folder shows the following buttons:

1. **General:** You can allow\disallow posting to the public folders. You can also allow\disallow posting to external users & internal users.
2. **Email address:** You can also add email addresses to it.
3. **Mail flow Settings:** You can manage Email forwarding settings to mailboxes.
4. **Permissions:** You can also adjust permissions such as **Send on Behalf** and **Send As**.

Then click on **Add Public Folder** button.

Note: To delete a folder click on **Delete**.

Add Public Folders

Public folders are designed for shared access and provide an easy and effective way to collect, organize, and share information with other people in your work group or organization.

To Add Public Folders navigate to the following path:

Click on **Manage** and then select **Public Folders** tab. Click on **Add Public Folder** button. Fill in the following fields:

1. **Public folder root:** Select the root for the public folder you want to create.
2. **Folder name:** Give the name of the public folder.
3. **Mail Enable Folder:** Check or uncheck if you want a Mail Enable. Provide email address.
   a. **Email Address:** Provide email address.
   b. **Allow posting to external users:** Checkbox
   c. **Allow posting to internal users:** Checkbox.

Then, click **Add Public Folder** button.

General (PF)

To view and manage general settings of Public Folders navigate to the following path:

Click **Manage** from Options in front of Exchange account and select **Public Folders** tab. Click on a existing Public Folder name or create new. Under **General** tab you will see following options
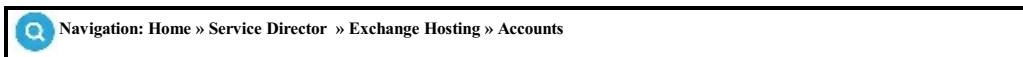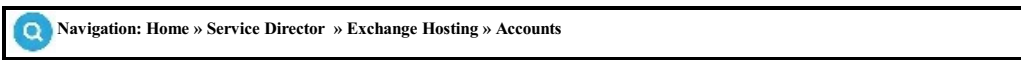
Public Folders

1. **Public folder name:** this shows the name of Public Folder.
2. **Size (MB):** It shows size of a Public folder in MBs.
3. To enable or disable mail on a PF click **Mail Enable/Disable Folder**
4. To allow /disallow posting on external users click **Allow/Disallow posting to external users**
5. To allow /disallow posting on internal users click **Allow/Disallow posting to internal users**

Public Folder Posting

1. **MailBox:** It shows the member mailboxes.
2. **Permission Level:** It shows the permission level.
3. **Options:** Following are available under options:
    i. Edit
    ii. Allow/Disallow
    iii. Apply changes to this public folder an its sub-folder.

Add Permissions to Public Folders

To add permission to public folders navigate to the following path:

Click **Manage** from options in front of Exchange account and select **Public Folders** tab. Click on a existing Public Folder name or create new. Under **General** tab, click **Add Permissions** button under section "Public Folder Posting":

1. **Member:** Select member of Public Folder posting.
2. **Permission Level:** Select permission level either from the drop down list or select custom permissions.

Click **Save** when done.

Add Email Address

To add and manage email addresses to Public Folders navigate to the following path:

Click **Manage** from Options in front of Exchange account and select **Public Folders** tab. Click on a existing Public Folder name or create new. Under **Email Address** tab you will see following listing:

1. **Email Address:** It shows the already added email address.
2. **Primary email:** It shows primary or not.
3. **Options:** It shows option to **Set as Primary** or **Remove**.

Add Email Address

Email Address: Provide email alias and select domain from the dropdown list.

Click **Add** when done.

Click **Manage** from Options in front of Exchange account and select **Public Folders** tab. Click on a existing Public Folder

Mail Flow Settings

To add and manage email addresses to Public Folders navigate to the following path:

Click **Manage** from Options in front of Exchange account and select **Public Folders** tab. Click on a existing Public Folder name or create new. Click on the **Mail Flow Settings**tab and enable the **Enable email forwarding** checkbox. Enter the address where mail shall forward in **Forward to** box.

You can also apply **limits**.

1. **Recipient limit:** Provide limit or check Unlimited.
2. **Max sending message size limit (MB):** Provide limit or check Unlimited.
3. **Max receiving size limit (MB):** Provide limit or check Unlimited.

You can also provide Storage Quotas

1. **Issue warning at (MB):** Provide issue warning at storage limit.
2. **Maximum item size (MB):** Provide maximum item size.
3. **Prohibit post at (MB):** Provide prohibit post at in MBs.

Keep delete items for (Days): You can also provide delete item retention in days.

The **Restrictions** displays following:

Accept Message From: There are two options to select from:

1. **All sender:** If selected, message will be accepted from any sender.
2. **Only senders in the following list:** If you selected, the message will be accepted only from the addresses selected from the list.

Reject Message From: There are two options to select from:

1. **No sender:** If selected, message will never be rejected.
2. **senders in the following list:** If you selected, the message will be rejected if coming from the addresses selected from the list.

Click on **Save** button when done.

Send Permissions (PF)

To manage Send on Behalf and Send As permissions on a Public Folder navigate to the following path:
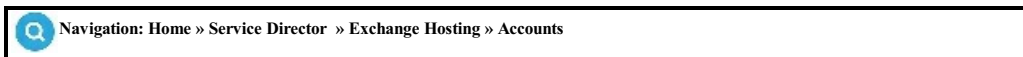
Click **Manage** from Options in front of Exchange account and select **Public Folders** tab. Click on a existing Public Folder name or create new. Click on the **Permissions** tab.

1. **Send On Behalf:** Select mailboxes/contacts/groups to Send on behalf and Save.
2. **Send As:** Select mailboxes/contacts/groups to Send As and Save.

Viewing Rules

Under **Rules** tab, you can manage disclaimers, signatures and transport rules. **Disclaimers** are custom messages (like legal notices) automatically added to emails. **Signatures** are personalized text, often including contact details, appended to emails. **Transport rules** are conditions-based actions that manage mail flow, such as redirecting, rejecting, or modifying messages. These rules help enforce policies, add disclaimers, or ensure compliance with regulations.

To view rules, navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **Rules** tab.

You can view and perform following operations:

1. **Disclaimer:** You can manage disclaimers.
2. **Signatures:** You can manage signatures.
3. **Transport Rules:** You can manage transport rules

Add Disclaimer

To add disclaimers, navigate to the following path:

Click on **Manage,** select **Rules** tab and then select **Disclaimer**.

Add Disclaimer

To add a new disclaimer click **Add Disclaimer** and provide following:

1. **Disclaimer Name:** Provide disclaimer name.
2. **Disclaimer To:** Select from drop down list incoming and outgoing message.
3. **Apply this rule if the recipient is:** Select Mailbox or Group from the dropdown list.
4. **Prepend Disclaimer:** Checkbox to prepend disclaimer.
5. **Disclaimer Text:** Here you can write your disclaimer text and apply formatting.
6. **Prepend the subject of the message with:** Please provide subject for prepend disclaimer.
7. **Except if the Sender's Domain is:** Select the conditions for displaying the disclaimer if Sender domain provided.
8. **Except if subject or body contains words:** Select the conditions for displaying the disclaimer. Please provide comma separated words or phrases without any double quotes. System will separate data on the basis of comma.
9. **Do not append disclaimer if From address contains:** Please provide comma separated email address(es) without any spaces. System will separate data on the basis of comma.

Click **Save** when done.

Add Signatures

To add signatures, navigate to the following path:

Click on **Manage,** select **Rules** tab and then select **Signatures**.

Add Signature

To add a new disclaimer click **Add Signature** and provide following:

1. **Signature Name:** Provide signature name.
2. **Signature For:** Select from Selectable to Selected.
3. **Signature Html:** Provide signature in html.
4. **Signature Text:** Provide custom variable
5. **Signature Text On Mobile:** Provide custom variables
6. **Signature Options:** Select signature options:
    i. Auto Add Signature
    ii. Auto Add Signature On Mobile
    iii. Auto Add Signature On Reply

Click **Save** when done.

Add Transport Rules

To add transport rules navigate to the following path:

Click on **Manage,** select **Rules** tab and then select **Transport Rules**.

Click **Add Transport Rule** to create an new rule and provide following:

1. **Rule name:** Provide rule name.
2. **Apply this rule if:** Please select condition.
3. **Do the following:** Select action.
4. **Except if:** Select "Except if" condition.

Properties of this rule:

1. **Audit this rule with severity level:** Select severity level.
2. **Choose a mode for this rule:** Choose mode:
   i. Enforce,
   ii. Test with Policy Tips,
   iii. Test without Policy Tips.
3. **Activate this rule on following date:** Choose date
4. **Deactivate this rule on following date:** Choose date
5. **Stop processing more rules:** Check box.
6. **Defer the message if rule processing doesn't complete:** Check box.
7. **Match sender address in message:** Select following:
   i. Header,
   ii. Envelope,
   iii. Header or Envelope.
8. **Comments:** Provide comments.

Click **Save** when done.

Group Actions

To view Group Actions, navigate to the following path:

To search for the Group actions

1. **Customer ID:** It is the customer id.
2. **Customer Name:** It is the customer name.
3. **Owner:** It is the owner of the exchange.
4. **Organization:** It is the name of the organization.
5. **Command:** It is the command on which group action is to be performed.
6. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.

Click **Reset Tries Count** to automate provisioning process once the tries count reached '10'. You can also **Clear Completed/Cancelled Jobs**. It displays the following listings:

1. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.
2. **Command:** It is the command on which group action is to be performed.
3. **Date:** It displays the date.
4. **Entered Tries:** It shows the number of entered tries.
5. **Last Tried:** It displays the last try.
6. **Customer ID:** It is the customer id.
7. **Customer Name:** It is the customer name.
8. **Owner:** It is the owner of the exchange.
9. **Added by:** It displays the name of the employee.
10. **Option:** You can manually click on RUN link for failed items. You can change password.

Viewing Retention Settings

To view/add retention policies and tags navigate to the following path:

> 🔍 **Navigation: Service Director » Exchange Hosting » Exchange Accounts » Manage**

It show the buttons to add **Retention Tags** and **Retention Policies**. The list displays the following:

1. **Tag name:** It displays the tag name.
2. **Tag type:** It displays the tag type.
3. **Action to take when age limit is reached:** It displays the action to be taken.
4. **Age:** It displays the time period.
5. **Retention enabled:** It shows the tag is enabled or not.
6. **Options:** You can remove the tag from option column.

Allow Customers to Enable/Disable Retention Settings:

To allow/disallow "Manage Retention Policies" on Customers/Resellers, check/uncheck this option under "Exchange Service Plans".

To create a hosted email plan navigate to following path:

> 🔍 **Navigation: Home » Service Plans » Exchange**

Under **Resources** tab and check the option **Customer can manage Retention policy:**

Note: You can also edit existing hosted email plans by clicking on the **Edit**. and **Sync sold plan resources.**

If this **Sync sold plan resources** checkbox is checked, product name, comments, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox settings.

Adding Retention Policies

Retention Policy is an archiving and deletion policy that automatically moves items to a user's archive mailbox and automatically deletes items from the mailbox.

To add retention policies navigate to the following path:

Navigation: Service Director » Exchange Hosting » Exchange Accounts » Manage
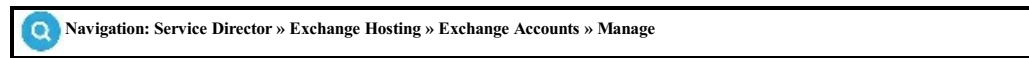
Click on the **Retention Policies** button to add.

The list displays the following:

1. **Name:** Enter the name of the policy.
2. **Retention policy tag:** Check the tag for which you want to define policy.
3. **Mailboxes:** Check mailboxes on which you want to apply the policy.

Click on **Save** button when done.

Adding Retention Tags

A retention tag applies retention settings to individual messages and folders in a user's mailbox. It defines how long a message remains in the mailbox and what action is taken when the message reaches the specified retention age. When a message reaches its retention age, it's either moved to the user's archive mailbox or it's deleted.

To add retention tags navigate to the following path:

Click on the **Retention Tags** button to add tag.

The list displays the following:

1. **Tag name:** Enter tag name.
2. **Tag type:** Select tag type from the drop down list. All other folders in the mailbox, Contacts, Conversation History, Deleted Items, Drafts, Inbox, Journal, Junk E-mail, Notes, Outbox, Personal Folder, Recoverable Items Folder, RSS Feeds, Sent Items, Sync Issues.
3. **Disable this tag:** If you want to disable the tag then check this option.
4. **Age limit for retention (days):** Enter Age limit for the tag.
5. **Action to take when age limit is reached:** Select action to be taken from the drop down list for e.g. Delete and allow recovery Permanently delete Move to archive
6. **Comments:** Enter comments.

Click on **Save** button when done.

In-Place Hold

To allow In-Place hold of a mailbox navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Exchange Accounts
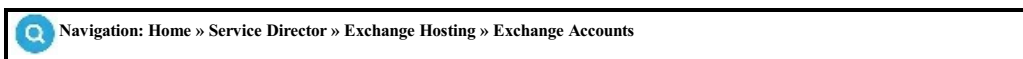
Click on **Manage** link and then select **Compliance Management** tab. Now select **In-Place hold** tab.

Enable: Check this option to enable In-place hold for a mailbox. In-place hold is available for Enterprise and Enterprise Plus mailbox.

- **Mailboxes:** Select mailboxes from Selectable

Allow Customers to Enable/Disable In-Place Hold:

In-Place Hold is an enterprise feature. You can allow/disallow customers/resellers to enable/disable In-Place Hold on mailboxes. Check/uncheck **In-Place hold allowed** option under "Exchange Service Plans".

To create a hosted email plan navigate to following path:

 Navigation: Home » Service Plans » Exchange
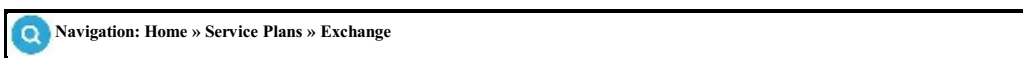
Under **Resources** tab and check option **In-Place Hold allowed**.

Note: You can also edit existing hosted email plans by clicking on the **Edit**. and **Sync sold plan resources.** If this **Sync sold plan resources** checkbox is checked, product name, comments, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox settings.

Journaling

To manage journaling of a mailbox navigate to the following path:
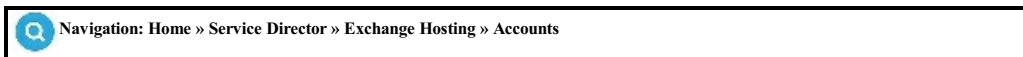
Click on **Manage** and then select **Compliance Management** tab. Now select **Journal Rules** tab.

Click on **Enable/Update Journaling** button. Journaling is available for Enterprise and Enterprise Plus mailbox.

1. **Mailboxes:** Select mailboxes from Selectable
2. **Scope:** Select scope for journaling for e.g. Global, Internal, or External.
3. **Recipient:** Select recipient user from the drop down list.

Click **Save** when done.

Allow Customers to Enable/Disable journaling:

Journaling is an enterprise feature. You can allow/disallow customers/resellers to enable/disable In-Place Hold on mailboxes. Check/uncheck **Journaling allowed** option under "Exchange Service Plans".

To create a hosted email plan navigate to following path:
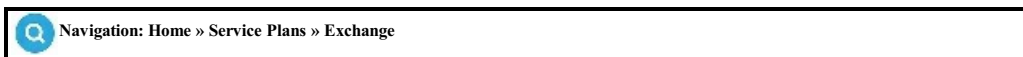
Under **Resources** tab and check option **Journaling allowed**.

Note: You can also edit existing hosted email plans by clicking on the **Edit** and **Sync sold plan resources.** If this **Sync sold plan resources** checkbox is checked, product name, comments, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox settings.

Managing Spam Filter

To manage spam filter, navigate to the following path:

Click on **Spam Filters** tab and check the following option for the organizations:

1. **Enable SPAM filter for:** Provide organization name.
2. **Admin email:** Provide the email address for the administration purpose.
3. **Password:** Provide password.

Click **Save** when done.

Mobile Device Mailbox Policy

Mobile device mailbox policy is a common set of policies or security settings to a collection of users. After you allow Exchange ActiveSync in your Exchange organization, you can create new mobile device mailbox policies or modify existing policies.

To manage mobile device mailbox policy, navigate to the following path:

🔍 **Navigation: Home » Service Director » Exchange Hosting » Accounts**
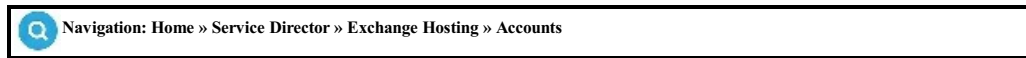
Click on **Manage** in front of the Exchange account, Select **Mobile Device Mailbox Policy** tab and check the following option for the organizations:

1. **Name:** Provide the name of mobile device policy.
2. **Allow mobile devices that don't fully support these policies to synchronize:** Check this option to enable.
3. **Require a password:** Check if required.
4. **MailBoxes:** Select mailboxes for the policy.

Click **Save** button when done.

Allow Customers to Enable/Disable Mobile device management:

To allow/disallow **Mobile device Policy Management** for customers/resellers, you can check/uncheck "Mobile Device Policy Management allowed" under "Exchange Service Plans".

To create a hosted email plan navigate to following path:

🔍 **Navigation: Home » Service Plans » Exchange**

Under **Resources** tab and check option **Mobile device management allowed**.

Note: You can also edit existing hosted email plans by clicking on the **Edit** and **Sync sold plan resources.**

If this **Sync sold plan resources** checkbox is checked, product name, comments, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox settings.

Application Impersonation

The Application Impersonation management role enables applications to impersonate users in an organization to perform tasks on behalf of the user.

To view application impersonation navigate to the following path:

Click on the **Manage** for any account to show options to manipulate and manage corresponding exchange account.

Select **Application Impersonation** tab. Select Mailboxes and then click **Save**.

Allow Customers to Enable/Disable Application Impersonation:

To allow/disallow "Application impersonation" for Customers/Resellers you can check/uncheck "**Application Management allowed**" option under "Exchange Service Plans".

To create a hosted email plan navigate to following path:

Under **Resources** tab and check option **Application impersonation management allowed:**

Note: You can also edit existing hosted email plans by clicking on the **Edit** and **Sync sold plan resources.**

If this **Sync sold plan resources** checkbox is checked, product name, comments, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox settings.

Calendar Permissions for Security Groups

To manage calendar permissions of SG navigate to the following path:
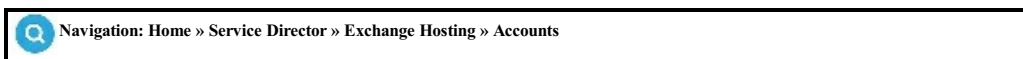
Click on **Manage** and then select **Calendar Permissions** tab. Select permission level for default SG and provide custom permissions.

1. **Anonymous:** Select permission level for e.g. None, Availabilty Only, contributor, Editor, Owner, Reviewer etc.
2. **Default:** Select default permission level for SG groups.
3. **testcompany Exchange SG:** Select SG Group.

Custom Permissions: It will show the Custom permissions that has been added to Groups already.

To add permissions provide below and click **Add**.

1. Select **Group**
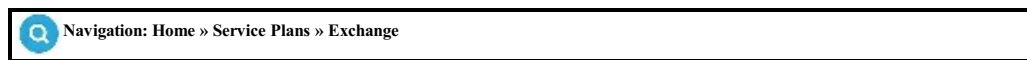2. **Permission:** Select Permission

Click **Save** when done.

Hosted Email Plan Management

Hosted email plans are created through powerful Service Plan Wizard. It includes following:

1. [Reseller Product Listing](#)
2. [Customer Product Listing](#)
3. Add-ons Management

To create a hosted email plan navigate to following path:

Note: You can also edit existing hosted email plans by clicking on the **Edit**.

Click **Add New Product** button. When the page loads, you will see the following settings.

1. **Product Type:** Select **Exchange Hosting** from the drop-down list.
2. **Product Name:** Enter the name of your product.
3. **Provider:** Select Provider
4. **Server Group:** Select server
5. **Is Active:** Select No if you want to disable this product selling.
6. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
7. **Associate Add-on:** You may want to associate add-on with this product. Your choices are:
   a. Optional
   b. Required
   c. Suppressed
8. **Associate Domain:** Select how you want to associate domains with this product. Your choices are:
   o Required
9. **Edu-Discount Package:** Check this option to enable.
10. **Date:** This is date set by the system (not editable).
11. **Sync sold plan resources:** Check this option in order to Sync resources to sold existing subscriptions associated with the package. **Note:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings. Skype4B plan or add-on is not updated if it is assigned to user already.
12. **Enabled For Commission Reseller(s):** If you check this option the Customer Product Plan will be enabled for Commission type Resellers. (Visible only if Commission Type Reseller option is enabled in Built-in Module.)
    i. All Resellers
    ii. Select Resellers
13. **Product Comments:** Enter any comments you want to associate with this product. These comments show up on the store-front when this product is selected.

Once you click the **Next** button you will be present with series of forms to configure your product.

Resources: On step-2 you will set the exchange resources for the plan.

Payment Cycles: This form lets you select Payment Cycles for the plan. You must select at least one payment cycle and payment group.

Select the payment cycle and click right arrow button to move it to **Selected Cycles** list.

Select the payment group and click right arrow button to move it to **Selected Payment Groups**list.

Price Group: This form lets you set prices for the Payment Cycles and Payment Groups you have selected in the previous step. Here you may set:

a. Setup Price
b. Price
c. Discount

Enter prices in each box.

Possible Product Upgrade / Downgrade: Here you can configure the upgrade and downgrade behavior of this product. When a product is purchased, your client may perform upgrade/downgrade from their control center without your involvement.

Associate Add-on: This form lets you associate add-on with your hosting plan. Your client may buy these add-on using online store or order them through their customer control center.

<u>Note:</u> Repository and billing service is provided, no management is involved in this case of add-on. If you require that the add-on is provisioned through Control Panel Provisioning System, please refer to: Creating Add-on

Click **Finish** button to complete product setup.

Exchange Databases

A mailbox database is a unit of granularity where mailboxes are created and stored. In control panel, each mailbox database has its own properties that you can configure.

To view Exchange Databases, navigate to the following path:

To search for the Databases select *Exchange server* from the dropdown list and click on **Go** button. The interface shows the graphical representation of

1. Database Size on Disk
2. Mailboxes allocation on databases

To add new mailbox database, click on **Add Database** button. You can also **Sync Mailbox Avg Size** from Exchange server.

Databases

You can view the following fields for the **Databases**:

1. **Database Name:**This shows the name of the Mailbox Database.
2. **Database Size on Disk:** This shows the database size on disk.
3. **Server:** This shows the server name.
4. **Mounted:** It shows the status of the database mailbox.
5. **Mailboxes:** It shows the total number of mailboxes on the server. i.e Current and Maximum.
6. **Archive Mailboxes:** It shows the number of archived mailboxes in a database.
7. **Options:** From the option column you can perform the following operations on the database:
    a. **Edit:** you can edit the settings of a mailbox database.
    b. **Avg Mailbox Size:** It will show the avg database mailbox size.
    c. **Remove:** You can remove a mailbox database from the exchange server.

Advanced Database:

Under **Advanced Management** tab you will see following listing:

1. **Database name:** THis shows the name of MAilbox Database.
2. **Server:** This shows the name of the server.
3. **Database Availability Group:** It shows the database availability group.
4. **Active Copy Status:** It shows if the database on DAG server is Active or Passive.
5. **Details:** It shows following Options:
    i. **Copy Queue Length:** It shows copy queue length.
    ii. **Replay Queue Length:** It shows replay queue length.
    iii. **Last inspected log time:** It shows the last inspected log time.
    iv. **Database Size on Disk:** This shows the database size on disk.
    v. **Content Index State:** This shows content index state.
    vi. **Circular Logging Enabled:** It shows if circular logging enabled.
    vii. **Mounted:** It shows if database is mounted.

Add Mailbox database

To add new mailbox database, navigate to the following path and click on **Add Database** button.

To add mailbox database, provide the following fields under the databases tab:

1. **Database Name:** Provide an appropriate database name.
2. **Server Groups:** Select server groups.
3. **Select server:** Select the appropriate server from the dropdown list.
4. **Mount:** Check this option to mount the mailbox database.
5. **Customer:** Select the name of the customer from the dropdown list.
6. **Databases File path:** Provide the Database file path.
7. **Log folder path:** Provide the log folder path.
8. **Personal archive database:** Provide personal archive database.
9. **Maximum number of mailboxes:** Provide maximum number of mailboxes.
10. **Current number of mailboxes:** Provide current number of mailboxes.

Click on **Save** when done.

Public Folder Mailbox

Public folder mailbox purpose is to give Outlook users access to common folders for sharing information. Administrators can control user access by assigning permissions to a Public Folder. You can also make a Public Folder available to everyone in an organization as well.

To view/manage Public Folder Mailbox(PFM), navigate to the following path:

Click on **Add** to a add anew public folder mailbox.

There are two types of Public Folder mailbox you can add in control panel.

1. **Dedicated:** Select organization
2. **Shared:** Provide name of shared organization and add organization from the selectable box to selected.

Click **Save** when done.

Mailbox Templates

A Mailbox template is used to define a certain set of storage limits or SPLA type for mailbox, Storage for folders, OWA settings and restrictions etc.

To view mailbox templates navigate to the following path:

It displays the following listings:

1. **Template Name:** It shows the name of the template.
2. **Owner:** It shows owner name:
3. **Prohibit Send & Receive At (MB):** It displays the prohibit send & receive at in MB.
4. **Outlook License Enabled:** It shows the outlook license enabled or not.
5. **OWA ActiveSync Enabled:** It shows OWA Active Sync Enabled or not.
6. **Exchange ActiveSync access allowed:** It shows the Exchange Active sync access allowed or not.
7. **Options:** The option will allow you to do the following:
   a. **Clone:** You can clone a template.
   b. **Edit:** You can edit an existing template.
   c. **Remove:** You can remove\delete a template.

Create Mailbox Template

To add new mailbox templates, navigate to the following path:

Add Template

Click on **Add** button to add a new mailbox template to the listing.

1. **Owner:** Select owner from the drop down list.
2. **Template Name :** Provide the name of the template.
3. **Distribution List Membership:** Provide distribution list membership.
4. **Microsoft SPLA Type:** Select the type of SPLA from the drop down list.

Storage Quotas: Provide and define storage under storage quotas section.

1. **Issue warning at (MB):** Provide issue warning at storage value in MB.
2. **Prohibit send at (MB):** Provide prohibit send at storage value in MB.
3. **Prohibit send and receive at (MB):** Provide prohibit send and receive at storage value in MB.
4. **Max Sending Message Size Limit (MB):** Provide maximum sending message size limit in MB.
5. **Max Receiving Size Limit (MB):** Provide maximum receiving size limit in MB.
6. **Recipient limit:** Provide recipient limit.
7. **Retention Limit:** Keep Deleted Items For Days: Provide retention limit. Leave blank for default.

Mailbox Features: Select mailbox features.

1. POP3 access allowed
2. IMAP access allowed
3. MAPI access allowed
4. OWA/HTTP access allowed
5. OWA all address lists enabled
6. OWA calendar enabled
7. OWA contacts enabled
8. OWA change password enabled
9. OWA journal enabled
10. OWA tasks enabled
11. OWA sticky notes enabled
12. OWA premium client enabled
13. OWA reminder and notifications enabled
14. OWA spell checker enabled
15. OWA search folders enabled
16. OWA signatures enabled
17. OWA junk mail enabled
18. OWA theme selection enabled
19. OWA UM integration enabled
20. OWA ActiveSync integration enabled
21. Outlook Non-Cached mode allowed
22. Exchange ActiveSync access allowed
23. OWA PublicFolder enabled
24. Outlook License Enabled

Custom Attributes: You can also select custom attributes in templates.

Assign Mailbox Templates

After creating the Mailbox Templates next is to assign mailbox templates to subscriptions. The are different ways to assign Mailbox templates to subscriptions.

Define Default Mailbox Template

To define company default mailbox template navigate to following path:

> 🔍 **Navigation: Home » System Configuration » Company Profile**

Select **Company's default mailbox template** from the dropdown list at the end of Company Profiles page.

Assign Mailbox Template using Service plans

To assign Mailbox Template using Service plans, navigate to the following path:

> 🔍 **Navigation: Home » Service Plan » Exchange**

Click **Edit** in front of Exchange Service plan under **Customer Product Listings** tab. Select **Resources** tab an then select Mailbox templates.

Click **Finish** when done.

Assign Mailbox Templates using Add-ons

To assign Mailbox Templates using Add-ons, navigate to the following path:

> 🔍 **Navigation: Home » Service Plan » Exchange**

Select **Add-on Management** tab and create new User mailbox addon and assign mailbox template. Associate this Add-on to service plan and then sell it to customer.

Mailbox Manager

To view mailbox manager navigate to the following path:

You can provide any of the following to search and filter your required mailbox(es) and click **Search** button:

1. Select Company Name [Owner]
2. Organization Name
3. Mail Domain
4. Customer ID
5. Customer Name
6. Company name
7. Display name
8. UPN
9. SAM Account Name
10. Address
11. City
12. State
13. Zip
14. Phone
15. Job title
16. Company
17. Department
18. Office
19. Mailbox Template
20. Select Country
21. Select Status
22. Select Type
23. Select Litigation hold
24. Select hidden from Address List

To add a new mailbox Click **Add Mailbox** button

1. **Mailbox type:** Select the type of mailbox such as User, Linked, Shared, Room and Equipment.
2. **Exchange Organizations:** Select Organization from the dropdown list.

Click **OK**.

It will go to following page:

You can view more details on adding a mailbox: [Add Mailbox](#)

Mailbox Migration Overview

Control Panel provides cross forest Migration i.e. providers can migrate Exchange mailboxes from Exchange servers in one forest to Exchange servers in other forest.

Pre-requisites

1. Enable MRS proxy.
2. Auto-discovery should be in place.
3. Valid SSL certificate should be in place on both Exchange Platforms.

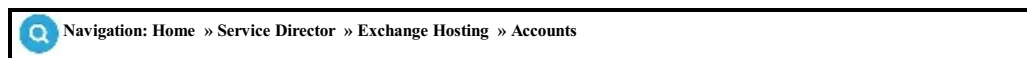In order to migrate mailboxes. Navigate to following path:

Navigation: Home » Service Director » Exchange Hosting » Mailbox Migration
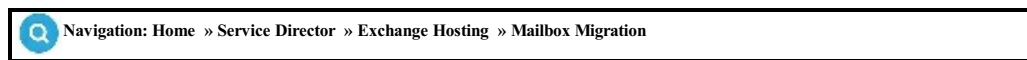
There are four tabs named as:

1. Stats
2. Endpoints
3. Batches
4. Mailbox Migration

Important: This will migrate the mailbox items (emails, folders and etc..), but it doesn't replicate the mailbox settings such as group membership, calendar permissions and etc..

To replicate the mailbox configuration settings, there is a separate desktop utility created to collect and compile the configuration/settings data of the selected mailboxes, distribution lists and mail contacts in data files in JSON format on source exchange server.

These files then can be imported in control panel by clicking on Update recipient settings under path:

Navigation: Home » Service Director » Exchange Hosting » Accounts

Click **Manage** and select **General settings** tab.

Stats (Mailbox Migration)

In order to view total stats for mailboxes that are migrated. Navigate to following path:

Dashboard

Select Exchange Server: Select Exchange server from the drop down list.

Batches: It shows following in the table.

1. **Status:** It shows status
2. **Count:** It shows total number.
3. **MailBoxes:** It shows total number of
   a. Synced
   b. Failed
   c. Stopped
   d. Remaining

MailBoxes: It shows following in the table.

1. **Status:** It shows status
2. **Count:** It shows total number.
3. **Items:** It shows total number of items that are
   a. Synced
   b. Skipped
   c. Remaining

End Points (Mailbox Migration)

In order to view and add endpoints for mailboxes that are migrated. Navigate to following path:

Select **Endpoints** tab. Click **Add New EndPoint** button.

1. **Endpoint name:** Provide end point name.
2. **Select Domain:** Select domain from dropdown list.
3. **Source mailbox email address:** Provide source mailbox email address.
4. **Source admin login in windows logon format (domain/username):** Provide source admin login in windows logon format (domainusername)
5. **Source admin password:** Provide source admin password.
6. Click **Verify End Point details.** Clicking **Verify Endpoints details** should show success message.
7. **Max concurrent migrations:** Provide maximum number of concurrent migrations.
8. **Max concurrent incremental sync:** Provide maximum number of concurrent incremental sync.

Click **Save** when done.

Batches (Mailbox Migration)

In order to view and add batches for mailboxes that are migrated. Navigate to following path:

> Navigation: **Home** » **Service Director** » **Exchange Hosting** » **Mailbox Migration**

Select **Batches** tab and click **Add New Batch** button. It shows following:

1. **Select Endpoint:** Select Endpoint from the dropdown list.
2. **Target Organization:** For target organization provide following:
   a. **Domain:** Select domain
   b. **Batch name:** Provide batch name.
3. **Select User(s):** Select users from Selectable to Selected
4. **Bad items limit:** Provide bad items limit.
5. **Large items limit:** Provide large items limit.
6. **Send report on Batch complete to:** Comma separated email addresses
7. **Auto start batch instantly:** Check box

Click **Save** when done.

Note: Exchange service should not be enabled on **Targeted AD User (s)**. For AD users you need to specify the Mailbox GUID for cross forest migration under optional settings of Ad Users.

Only those users will be visible on which GUIDs of source mailboxes are set under users and **Proxy address (es)** should be set (match email address of source mailbox).

GUID can be set on AD User(s)

1. Individually
2. Bulk import via .csv
3. Using ADSync (ADSync syncs GUIDs as well)

To add/edit an AD user navigate to the following path:

> Navigation: **Home** » **Service Director** » **Active Directory** » **Users**

Expand **Optional Settings** by clicking on (+) sign.

1. Mailbox GUID for migration
2. Mailbox Archive Guid
3. Mailbox Archive Name
4. Mailbox Recipient Type Details
5. Mailbox Culture
6. Proxy Addresses

Mailbox Migration

In order to view mailboxes that are migrated. Navigate to following path:

You will see the listing of all the mailboxes that are migrated. You can also search/filter the mailboxes using following filters:

1. Organization
2. Domain
3. Batch
4. User
5. Select Server
6. Select Status of Mailboxes from dropdown.

SPAM Expert

A SPAM Expert is a 3rd party program that is used to detect unsolicited and unwanted email and prevent those messages from getting to a user's inbox.

To integrate spam filter, navigate to the following path:

Click on **Edit** in front of the **Spam Filters** and provide the following:

1. **Enabled:** Check to enable Spam provider..
2. **Select SPAM Filter Provider:** Select spam expert.
3. **API Username:** Provide Spam expert API username.
4. **API Password:** Provide spam expert API password
5. **API URL:** Provide spam expert API URL e.g. https://demo1.spambrand.com/api/
6. **MX-Records from Spam Experts to Provision under Exchange DNS Zone:** Specify comma separated list of MX-Records without any space in HOST:PRIORITY format e.g. mx1.spambrands.com:25,mx2.spambrands.com:20,mbx.%domainName%:25 ...If Handle DNS is enabled under Exchange service, then these MX-Records will be added in exchange DNS zone.
7. **Destination Hosts to add in Spam Experts:** Select one of two options:
    a. Pick MX records from DNS templates associated with exchange service as Destination Hosts for SPAM Experts.
    b. **Set following as Destination Hosts for SPAM Experts:** Specify comma separated list of destination hosts without any space in HOST:PORT format. If PORT isn't required then set it to 0. e.g. mx1.exchange.com:25,mx2.exchange.com:0,192.168.10.10:25,mbx.%domainName%:25 ...These are usually exchange's address(es)/route(s) from DNS to add as Destination Hosts under Spam Experts domain.

Click **Save** when done.

PST Configuration

You can configure PST Exports/Imports under following path:

You will see the listing of Exchange server groups that are added in Control Panel which shows following:

1. **Server Group Name:** It shows server group name.
2. **UNC path for import:** It shows UNC path for import.
3. **UNC path for export:** It shows UNC path for export.
4. **Status:** It shows status of the server.
5. **Options:** Under option you can configure PST settings by clicking on Configure

PST Imports

To view completed PST Imports navigate to the following path:

Select **PST Imports** tab. You can import new job by clicking on **New Import Job:**

1. **Select organization:** Select organization from dropdown list.
2. **Select mailbox:** Select mailbox from dropdown list.
3. **PST file:** Select PST file
4. **Bad items limit:** Provide bad items limit.
5. **Large items limit:** Provide large items limit.
6. **Target Root Folder:** Provide target root folder.

Click **Add.**

Click **Save** when ready to import.

You can filter and search by provide following fields:

1. **Customer:** Provide customer name
2. **Organization:** Provide Organization name.
3. **Mailbox:** Provide mailbox.
4. Select **Status** for e.g. Pending, In Process, Completed with warning etc.

Click **Search** button.

PST Exports

To view completed PST Exports navigate to the following path:

Select **PST Exports** tab. You can filter and search by provide following fields:

1. **Customer:** Provide customer name
2. **Organization:** Provide Organization name.
3. **Mailbox:** Provide mailbox.
4. Select **Status** for e.g. Pending, In Process, Completed with warning etc.

Click **Search** button.

Orchestration Module for Microsoft SharePoint

Control Panel allows Hosted SharePoint Service through its Orchestration Module for Microsoft SharePoint. Control Panel Orchestration Module for SharePoint is designed for all sizes of service providers wanting to start or grow their Hosted SharePoint business while minimizing ongoing support costs.

Control Panel Orchestration Module for Microsoft SharePoint fully automates and controls service delivery for Microsoft SharePoint 2019 and its legacy versions, manages billing and provides self service control panel to your customer.

1. WSS3.0/MOSS 2007
2. Microsoft SharePoint 2010
3. Microsoft SharePoint 2010 Multi-tenant
4. Microsoft SharePoint 2013
5. Microsoft SharePoint 2013 Multi-tenant
6. Microsoft SharePoint 2016
7. Microsoft SharePoint 2016 Multi-tenant
8. Microsoft SharePoint 2019

Note: Please make sure you have subscribed to Orchestration Module for Microsoft SharePoint to avail this service otherwise you won't be able to utilize this feature. If you have any questions or want to avail this feature, please contact your service provider.

Overview SharePoint Server Groups

With Control Panel you may organize your SharePoint servers in groups. The groups are particularly effective for segregating SharePoint servers based on their role or capacity. For example, you may want to reserve couple of servers for Resellers only. You can do this by creating a server group and then adding those servers to that group.

Example:

1. Create a server group called **Reseller SharePoint Server Group**
2. Choose appropriate provider for e.g. **SharePoint 2019**
3. Add server(s) to this Server Group. These are actual servers where SharePoint Services is installed and will be provisioned.
4. Create a hosting plan "SharePoint Gold Hosting" and assign **Reseller SharePoint Server group** to this package.

Now, when you sell SharePoint Gold Hosting, Control Panel will automatically provision the hosted SharePoint service on of the member server(s) based on type of load balancing you have selected for server group.

Viewing SharePoint Server Groups

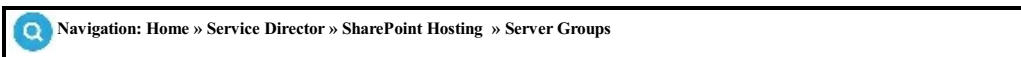To view/manage SharePoint server groups navigate to the following path:

The list of server groups displays following:

1. **Status:** It shows the status of the server group..
2. **Server Group Name:** Friendly name.
3. **Provider:** Indicates the SharePoint server provider for this server group.
4. **Options:** It shows following in the options:
    a. **Disable:** To disable a server group click on disable link.
    b. **Edit:** Click on this link to edit server group properties.
    c. **Remove:** Click to remove server group. You cannot remove a server group if there are active servers with active subscriptions.

Viewing SharePoint Server Group Members

To view/manage SharePoint server group members navigate to the following path:

Click on **Server Group Name** link, a new tab **SharePoint Hosting Servers** will open.

The list of server group members displays following:

1. **Status:** It shows the status of the SharePoint server.
2. **Server Name:** Friendly name of the server.
3. **Options:** It shows following in the options:
    a. **Test Service:** Click on Test Service link for the newly added service group to verify the connection between control server and remote server.
    b. **Disable:** Click on this link to disable hosted email provisioning on the server. You may want to do this if server is down or it is full.
    c. **Edit:** Click on this link to edit server properties.

Add/Edit SharePoint Server Group

To add a SharePoint server group navigate to the following path:

Note: You can also edit existing server group by clicking on the **Edit** link.

Click on **Add Server Group** button. A new screen will display following:

1. **Server Group Name:** This is the friendly name of the server group. For example, SPGroup01.
2. **Provider:** Select the desired hosted SharePoint provider for this group, for e.g. Microsoft SharePoint 2016
3. **Active Directory Domain:** Select the Active Directory domain. See How to Add Active Directory Domain section to learn about managing active directory domains.
4. **LDAP URL:** This is the location of active directory OU under which Control Panel will create hosted SharePoint organizations. You may change this location any time as this will not affect existing accounts. Example: LDAP://OU=Control Panel System,OU=Hosting, DC=Fabricam,DC=COM
5. **Enabled:** Check to enable the server.
6. **Override Domain Credentials:** You can check this option and use credentials other than the one mentioned in the Active Directory Domain.

Click **Next** button to proceed to step-2. Now you will be prompted to add to SharePoint server group member.

Add/Edit SharePoint Server Group Member

To add a SharePoint server group navigate to the following path:

Note: You can also edit existing server group member by clicking on the **Edit** link.

1. **Reference ID:** This can be any internal ID you want to assign.
2. **IP:** Enter the IP address of your SharePoint server.
3. **Front-End Server IP(s):** Provide IP addresses in comma separated way. i.e:10.1.1.1, 10.1.1.2, 10.1.1.3
4. **SharePoint Web Application URL:** Enter the web application name that you created during SharePoint installation step. For example, fabrikam.com. This web application is used to extend site collections.
5. **Web Application ID:** Enter the ID SharePoint site.
6. **Public IP of the SharePoint Server:** Provide SharePoint public IP.
7. **Add IIS Binding:** Check this option to add IIS bindings.
8. **Host File Entries:** Check this option to add host file entries.
9. **Handle Claim Authentication:** Check this option to add /handle claim authentication.
10. **Handle DNS:** Click here to handle DNS and select primary DNS sever from the dropdown list.
11. **File Restrictions:** Enter the file types from being saves or retrieved from nay site on the server. If a user tries to save or retrieve a blocked file type, he or she will see an error and will not be able to save or retrieve the file.
12. **Send e-mail notifications to owners of unused site collections:** Tick this checkbox if you would like to enable this option on your SharePoint server.
13. **Start sending unused site collections notifications:** Default value is 25.
14. **Check for unused site collections and send notices:** Select the interval and time.
15. **Automatically delete the site collection if use is not confirmed:** Tick this checkbox if you would like to enable this option on your SharePoint server.
16. **Delete the site collection after sending:** Default value is 28 notices.
17. **Outbound SMTP server:** Enter the SMTP server IP/name to use for sending e-mails.
18. **From/Reply-to Address:** Enter the From and Reply-to addresses for the SharePoint generated e-mails.
19. **Use TLS Connection Encryption:** Select Yes or No
20. **SMTP Server Port:** Provide SMTP port number.

In case of **SharePoint Multi-tenant 2013** you have to provide the following fields:

1. **Foundation Feature Pack ID:** Enter Feature Pack ID.
2. **Standard Feature Pack ID:** Enter Feature Pack ID.
3. **Enterprise Feature Pack ID:** Enter Feature Pack ID.
4. **User Profile Service Proxy:** Provide UPA proxy name.
5. **Managed metadata Service Proxy:** Enter MMS proxy name.

Click on **Finish** button.

SharePoint Account

To view SharePoint accounts navigate to the following path:

Click on **Manage** link for any account to show options to manipulate and manage corresponding SharePoint account.

You can provide any of the following and click **Search** to filter the SharePoint accounts:

1. Select Company Name [Owner]
2. Subsc.ID
3. Customer ID
4. Customer Name
5. Portal address
6. Portal Title
7. Domain Name

The list displays the following:

1. **Status:** It shows the status of the account.
2. **Subsc.ID:** This is unique ID assigned to the subscriptions.
3. **Portal Title:** Specific title that is assigned to the site.
4. **Package:** It shows the name of the package.
5. **URL:** Web address of newly created site.
6. **Users:** Number of subscribed users against the site.
7. **Customer:** It displays the customer name along with id.
8. **Owner:** It displays the name of the owner.
9. **Options:** Click on **Manage** link to manage SharePoint service.

Hosted SharePoint Service Management

Orchestration Module for Microsoft SharePoint activates rich web based interface for the management of hosted SharePoint service. Using the web interface the provider and the end-user may perform routine management task without the need of going at the SharePoint Central Administration server or active directory.

To manage SharePoint accounts navigate to the following path:

Navigation: Home » Service Director » SharePoint Hosting » Accounts
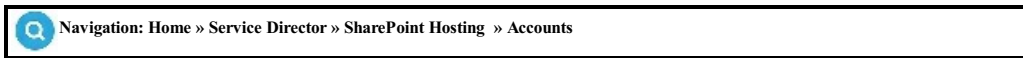
Click on **Manage** link from options.

You will see the following tabs.

1. **General Settings**: Click on Put on Hold button to put it on-hold. You can view the general and the service summary.
2. **SharePoint Portal:** Click on **Connect to SharePoint Portal** link to view SharePoint Portal. Click on **Edit** button to edit SharePoint Portal.
3. **Domains:** You can add new SharePoint domains.
4. **Permission Levels:** You can add permission level to your SharePoint account depending upon base permissions.
5. **Groups:** You can add new group for permission levels.
6. **Users:** You can view all the users. Click on **Add User** button to create a new user. Click here to Add a new User.
7. **Group Actions:** You can view all the action performed on Users.

Update Binding

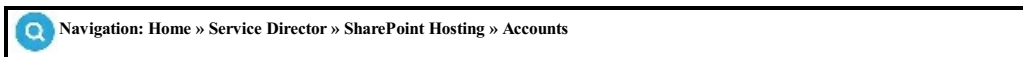To Update SharePoint bindings navigate to the following path:

Click on **Manage** link from options. Under **General Settings** tab, you can "Update Binding" by clicking: **Click here to update Front-End Server(s) binding.**

Viewing SharePoint Portals

To view SharePoint Portals navigate to the following path:

Click on **Manage** and select **SharePoint Portal** tab. Click here to see how to add new portal/organization.

1. **Domain Name:**It shows the SharePoint domain name for e.g. domain.com.
2. **Portal Title:** It shows the title of the SharePoint portal.
3. **Description:** It shows the description if any.
4. **URL:** It shows the URL of the SharePoint portal for e.g. http://pss.sp-pss-10.
5. **Manager:** It shows the manager of the portal.
6. **Manager Email:** It shows the email address.
7. **Maximum Storage level for each site collection (MB):**It shows maximum storage level fro each site.
8. **Send warning e-mail when storage for each portal reaches (MB):** It send warning when storage for each portal reaches its limit.
9. **Limit maximum usage per day to (points):** It shows maximum limit for usage per day.
10. **Send warning email when usage per day reaches (points):** It send email when usage per day reaches.
11. **Language:** It shows the Locale for e.g. English.
12. **Anonymous State:** It shows Anonymous State if any.
13. **SharePoint:** Click on the **Connect to SharePoint Portal** link to connect.

Note: Click on **Edit** button to edit a SharePoint Portal.

Add new Organizations/Portals

To create a new Organization / Portal for your SharePoint account navigate to the following path:

Click on the SharePoint Subscription. Select **Organizations/Portals** tab.

The list of SharePoint portals displays following:

1. **Organization Name:** The active directory name of the organization. With the name an active directory organizational unit (OU) is created for the organization.
2. **Portal:** This is the URL of the SharePoint portal. http://portal.machsol.com
3. **Title:** This is the SharePoint portal title.
4. **Users:** Total users in the SharePoint portal.
5. **Manage:** Click on Manage to manage SharePoint service.
6. **Delete:** Click to delete the organization. This operation removes organization's OU from active directory and associated settings from SharePoint server.

To add a new portal click on the **Add New Portal** button.

Fill in the following fields:

1. **Select existing or new organization:** Select an existing organization from the drop down list or create the new one.
2. **Domain Name:** This must be a valid registered and active domain.
3. **Manager:** Create account for the manager.
4. **Portal address:** Provide portal address. For e.g. *portaladdress.sp-pss-10*.
5. **Title:** Provide title.
6. **Description:** Provide description about the portal.
7. **Admin email:** Provide email address for the admin.
8. **Locale:** Select locale from the drop down list.

Then click on **Save** button.

Note: Click here to view the [SharePoint Service Management](#).

Adding SharePoint Domains

To add a new domain to SharePoint, navigate to following path:
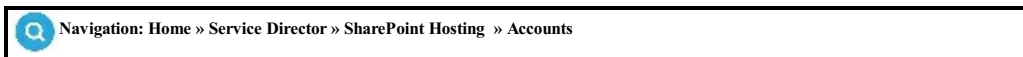
Click on **Manage** link from options. Select **Domains** tab:

1. **Domain:** This displays the domain name.
2. **Default:** It shows the domain default settings.
3. **Options:** You can delete a domain or change its default settings from options.

To add a new domain provide the domain name and click on **Save** button.

Add Permission Level

To view/add SharePoint permission level navigate to the following path:

> 🔍 **Navigation: Home » Service Director » SharePoint Hosting » Accounts**
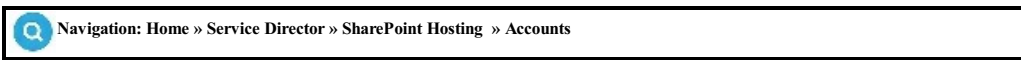
Click on **Manage** and then select **Permissions Level** tab. It displays the following listing:

1. **Name:** It displays the name of the Permission level.
2. **Description:** It displays description of the permission level.
3. **Base Permissions:** It displays the base permissions.
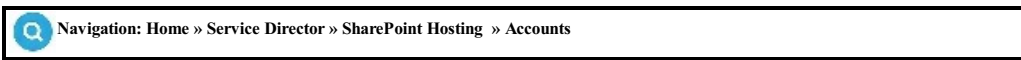4. **Options:** You can edit the group and delete the group from the options column.

Click on the **Add Permission Level** button to add a new permission level.

1. **Name:** Provide the name of the Permission level.
2. **Description:** Provide the description of the permission level.
3. **Base Permissions:** Select the base permissions.

Click on **Save** when done.

Add Groups in SharePoint

To view/add SharePoint groups, navigate to the following path:

Click on **Manage** link and then select **Groups** tab. It displays the following listing:

1. **Group name:** It displays the name of the group.
2. **Group Owner:** It displays the name of the group owner.
3. **Permission Levels:** It displays the permission levels on the group.
4. **Options:** You can edit and delete the group from the options column.

Click on the **Add Group** button to add a new group.

1. **Group name:** Provide the name of the Group.
2. **Description:** Provide the description fro the group.
3. **Group Owner:** Select he Group owner from the drop down list.
4. **Permission Levels:** Select permission level for the group i.e. Full, Design Edit, Contribute or Read.
5. **Group Members:** Check the members of the group.

Click on **Save** when done.

Viewing SharePoint Users

To view SharePoint users navigate to the following path:

Navigation: Home » Service Director » SharePoint Hosting » Accounts

Click on **Manage** link. Choose **Users** tab. You can search SharePoint users by providing any of the following and click **Search** button.

1. Display name
2. User Role
3. UPN
4. SAM Account Name
5. Address
6. City
7. State
8. Zip
9. Select Country
10. Phone
11. Job title
12. Company
13. Department
14. Office

Click **Add User** to add new SharePoint user or click **Add Bulk Users**. You can also perform **Group Actions** for SharePoint users.

It displays the following listings:

1. **User:** It shows the display name of the SharePoint user.
2. **Details:** It shows following for user details:
    a. **Status:** It displays the status of users.
    b. **User Role:** It displays the User role.
    c. **Date Created:** It displays the date on which it is created.
3. **Options:** You can **Set Primary Admin**, **Edit**, **Remove** or **Remove and Delete AD User** from options.

Add SharePoint User

To add SharePoint User(s) navigate to the following path:
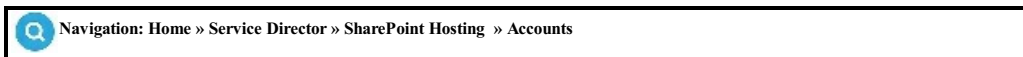
Click on **Manage** and then select **Users** tab. You can **Add User**, **Add Bulk User** and **Group actions.**

Click on **Add User** button.

The add user screen displays following:

1. **User:** You may create a new user or select an existing active directory user.
2. **Display Name:** Provide Display name of the User.
3. **User Role:** Select the user role you wish to assign to the new user.
4. **Member of:** Check the Groups for permission level for the SharePoint user.
5. **Is Site Admin:** Check if the user is site admin.
6. **Email:** This is the e-mail address where SharePoint account e-mail is sent.
7. **Password:** Provide password
8. **Notes:** Write notes if any.
9. **Send email to:** Provide email address.

Click on **Save** button when done.

To manage option such as **Delete**, assign **User roles** and Set **Site Admin** in bulk select **Group Actions** button.

Edit SharePoint Users

To edit SharePoint users navigate to the following path:
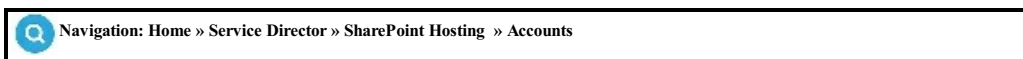
Click on **Manage** link. Choose **Users** tab. It displays the following listings:

You can **Edit** SharePoint user from options.

The **General** button displays the following:

1. **User:** Edit the name of the user.
2. **Display Name:** Enter a friendly name.
3. **User Role:** Select user role as Owner, Visitor or Member
4. **Member of:** Select Group.
5. **Is Admin:** Check this if you want to set user as Admin
6. **Notes:** Enter notes. Then click on **Save** button.

The **Set Password** button displays the following:

1. **Password:** Enter password.
2. **Confirm password:** Re-type Password.
3. **Send Email:** Tick means Yes.
4. **Send email to:** Enter receiver's email address. Then click on **Set Password** button.

Group Actions

To view Group Actions, navigate to the following path:

To search for the Group actions

1. **Parameter:** Provide parameter.
2. **Select Action Type:** It is the command on which group action is to be performed.
3. **Select Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.

Click **Reset Tries Count** to automate provisioning process once the tries count reached '10'. You can also **Clear Completed/Cancelled Jobs**. It displays the following listings:

1. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.
2. **Command:** It is the command on which group action is to be performed.
3. **Date:** It displays the date.
4. **Entered Tries:** It shows the number of entered tries.
5. **Last Tried:** It displays the last try.
6. **Customer ID:** It is the customer id.
7. **Customer Name:** It is the customer name.
8. **Owner:** It is the owner of the exchange.
9. **Added by:** It displays the name of the employee.
10. **Option:** You can manually click on RUN link for failed items. You can change password.

Hosted SharePoint Plan Management

Orchestration Module for Microsoft SharePoint offers extremely powerful and flexible SharePoint hosting plan wizard. To create a hosted SharePoint plan, navigate to following path:

🔍 **Navigation: Home » Service Plans » SharePoint**

Note: You can also edit existing hosted SharePoint plans by clicking on the **Edit** link. It includes following tabs:

1. Reseller Product Listing
2. Customer Product Listing
3. Add-ons Management

Click **Add New Product** button. When the page loads, you will see the following settings.

1. **Product Type:** Select *Microsoft SharePoint* from the drop-down list.
2. **Product Name:** Enter the name of your product.
3. **Provider:** Select SharePoint provider.
4. **Server Group:** Select the server group where this service plan's user accounts will be setup.
5. **Allow Additional URL's:** Check this option to allow.
6. **Is Active:** Select No if you want to disable this product selling.
7. **Allow Prorate**: Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
8. **Associate Addon:** You may want to associate add-on with this product. Your choices are:
    a. Optional
    b. Required
    c. Suppressed
9. **Associate Domain:** Select how you want to associate domains with this product. Your choices are:
    a. Optional
    b. Required
    c. Suppressed
10. **Language:** Select Language of the server.
11. **Date:** This is date set by the system (not editable).
12. **Sync sold plan resources:** Check this option in order to Sync resources to sold existing subscriptions associated with the package. **Note:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings. Skype4B plan or addon is not updated if it is assigned to user already.
13. **Enabled For Commission Reseller(s):** If you check this option the Customer Product Plan will be enabled for Commission type Resellers. (Visible only if Commission Type Reseller option is enabled in Built-in Module.)
    a. All Resellers
    b. Select Resellers
14. **Product Comments:** Enter any comments you want to associate with this product. These comments show up on the store-front when this product is selected.

Once you click the **Next** button you will be present with series of forms to configure your product.

Resources: On step-2 you will set the SharePoint resources for the plan.

1. **Create portal as:** Select Sub-domain Sub-Domain -OR- Vanity URL Vanity Url.
2. **No. of Site Collections:** Provide total number of sites.
3. **Maximum Users per Organization / Site Collection:** Enter maximum number of users.
4. **Maximum Storage level for each site collection (MB):** Enter maximum number of storage level for each site collection.
5. **Sandboxed solution resource quota:** Send warning email when usage per day reaches (point) must be less then or equal to Limit maximum usage per day to (points).
    i. **Limit maximum usage per day to (points):** Provide maximum usage per day.
    ii. **Send warning e-mail when usage per day reaches (MB):** Enter storage for sending warning email.

Payment Cycles: This form lets you select Payment Cycles for the plan. You must select at least one payment cycle and payment group.

Select the payment cycle and click right arrow button to move it to **_Selected Cycles_** list.

Select the payment group and click right arrow button to move it to **_Selected Payment Groups_** list.

Payment Groups: This form lets you set prices for the Payment Cycles and Payment Groups you have selected in the previous step. Here you may set:

a. Setup Price
b. Price
c. Discount

Enter prices in each box.

Possible Product Upgrade / Downgrade: Here you can configure the upgrade and downgrade behavior of this product. When a product is purchased, your client may perform upgrade/downgrade from their control center without your involvement.

Associate Addon: This form lets you associate add-on with your hosting plan. Your client may buy these add-on using online store or order them through their customer control center.

Click **Finish** button to complete product setup.

SPLA Report

To view the SPLA Report for SharePoint navigate to the following path:

Click on the **Export to Excel** button to export the SPLA report to excel. The list displays the following:

The SPLA report tab displays the following:

1. **Site Collections**: It shows the total number of sites.
2. **Users:** It shows the total number of users.

The Multi-tenant SPLA report tab displays the following:

1. **Feature Pack:** This shows the foundation, standard, enterprise and total.
2. **Site Collections:** It shows the total number of sites according to feature pack.
3. **Users:** It shows the total number of users according to feature pack.

Portal Usage Report

To view/manage the Usage Report for SharePoint navigate to the following path:

Click on the **Export to Excel** button to export the usage report to excel. The list displays the following:

1. **Organization Name:** It displays the name of the SharePoint organization. To manage service click on the organization name.
2. **Customer Name:** It displays the customer name.
3. **Owner:** It displays the owner name.
4. **Title:** It shows the title of the SharePoint account.
5. **Portal address:** It shows the portal address.
6. **Allocated Storage:** It shows the allocated storage in MB.
7. **Current Storage Used:** It shows the storage used currently in MB.
8. **Active Domains:** It shows the no of active domains.
9. **Users:** It shows the no of users.

Orchestration Module for Microsoft CRM

Control Panel allows MS Dynamics CRM through its automation Module of CRM. Orchestration Module for Microsoft CRM adds billing, provisioning and management of Microsoft CRM Services to your hosted services. It allows your enterprise to perform better and in entirety, by covering every functional capability (e.g. CRM organization creation/deletion, Enable/Disable CRM Organization, CRM users and Security roles management etc.).

Following CRM version are supported in control panel:

1. CRM 4.0
2. CRM 2011
3. CRM 2013
4. CRM 2015
5. CRM 2016
6. Dynamics 365

Note: Please make sure you have subscribed to Orchestration Module for Microsoft CRM to avail this service otherwise you won't be able to utilize this feature. If you have any questions or want to avail this feature, please contact your service provider.

CRM Server Groups Overview

With Panel you may organize your CRM servers in groups. By Using Control Panel you may organize your CRM Servers in groups and may create different service plans for Customers / Resellers and at the same time handling of Internet-Facing Deployment (IFD) URL for every CRM organization."

Example:

1. Create a server group called **Reseller Customers**.
2. Assign **CRM 2016** as the provider.
3. Create a hosting plan "**CRM Gold Hosting**" and assign Reseller Customers group to this package.
4. Now, when you sell CRM Gold Hosting, Panel will automatically provision the hosted CRM service.
5. Remove Server from group. You cannot remove a server if there are active subscriptions on it.

Now when you sell CRM Gold Hosting, Panel will automatically provision the hosted CRM service on one of the two member servers.

Viewing CRM Server Groups

To view/manage CRM server groups navigate to the following path:

To add a new server click on **Add Server Group** button.

The list of server groups displays following:

1. **Status:** It shows the status of the CRM Server Group.
2. **Server Group Name:** Friendly name.
3. **Provider:** Indicates the CRM server provider for this server group.
4. **Options:** Following are the options:
   a. **Edit:** Click on this link to edit server group properties.
   b. **Remove:** Click to remove server group. You cannot remove a server group if there are active servers with active subscriptions.

Viewing CRM Server Group Members

To view/manage CRM server group members navigate to the following path:
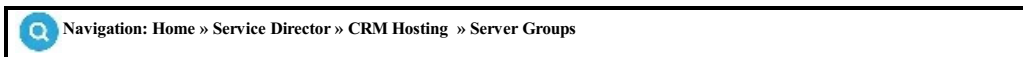
Click on the **Server Group Name** link a new tab **CRM Servers** will open.

The list of server group members displays following:

1. **Status:** It shows the status of CRM server.
2. **Server Name:** Friendly name of the server.
3. **SQL Report Server URL:** Type the SQL Report Server URL e.g. **http://<ReportServerIP>/ReportServer**
4. **Options**: Following are available in options column:
   i. **Test Service:** Click on Test Service link to test the servers are connected and integrated successfully.
   ii. **Disable:** Click on this link to disable hosted provisioning on the server. You may want to do this if server is down or it is full.
   iii. **Edit:** Click on this link to edit server properties.
   iv. **Remove:** Click to remove server from group. You cannot remove a server if there are active subscriptions on it.

Add/Edit CRM Server Group

To add a CRM server group navigate to the following path:
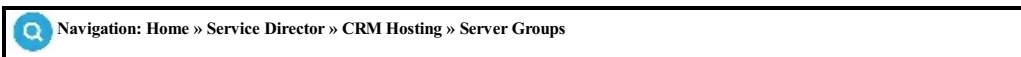
Note: You can also edit existing server group by clicking on the **Edit** link.

Click on **Add Server Group** button. A new screen will display following:

1. **Server Group Name:** This is the friendly name of the server group. For example, CRM ServerGroup01.
2. **Provider:** Select the hosted CRM provider for this group, for e.g. CRM 2016
3. **Active Directory Domain:** Select the Active Directory domain. See How to Add Active Directory Domain section to learn about managing active directory domains.
4. **LDAP URL:** This is the location of active directory OU under which Control Panel will create hosted CRM organizations. You may change this location any time as this will not affect existing accounts. Example: LDAP://OU=Control Panel System, OU=Hosting, DC=Fabricam, DC=COM
5. **Fill Style:** Select from one of the two options.
   a. **Least Filled First:** Setup hosting on the group member which is least filled.
   b. **One-by-One:** Setup hosting on group members in circular manner.
6. **Enabled:** Check to enable the server.
7. **Override Domain Credentials:** You can check this option and use credentials other than the one mentioned in the Active Directory Domain.

Click on **Next** button to proceed to step-2. Now you will be prompted to add CRM server group member.

Add/Edit CRM Server Group Member

To add a CRM server group navigate to the following path:

Note: You can also edit existing server group member by clicking on the **Edit** link.

Click on **Add Group Member** button in front of desired server group.

1. **Reference ID:** This can be any internal ID you want to assign.
2. **Server IP:** Enter the IP address of your CRM server.
3. **Front End Server IP (Muti-tier):** Enter the IP address of your CRM server.
4. **CRM IFD site URL:** Enter the CRM IFD site URL.
5. **URL Base:** Specify the CRM service URL base e.g. MS CRM Services.
6. **CRM Server Port:** Set here the port number for your CRM server, e.g. 5555. Default port is 80.
7. **Discovery Service URL:** http:// or https:// Enter the discovery Service URL.
8. **Discovery Service Port:** Enter port number of the discovery service.
9. **SQL Server Name:** Name of SQL server that is used for the Microsoft CRM database.
10. **SQL Report Server URL:** Type the SQL Report Server URL e.g. http://<ReportServerIP>/ReportServer
11. **ADFS Server FQDN:** Provide ADFS Server FQDN.
12. **External Relying Party Display Name:** Provide External relay party display name.
13. **Add Host Entry:** Check to add host entry.
14. **Handle DNS:** Check to handle DNS for CRM.
    i. **Select primary DNS server:** Select primary server
    ii. **Public IP of CRM server:** Provide public IP of CRM server.

Click **Save** button.

Note 1: In case when **CRM 4.0** is selected as provider the **discovery service URL** and **port** option will not be available.

Note 2: In **CRM 2011** and **CRM 2013**, the above two fields are mandatory in **IFD** deployments and are optional without IFD.

CRM Accounts

Navigating to the following path will display CRM accounts:
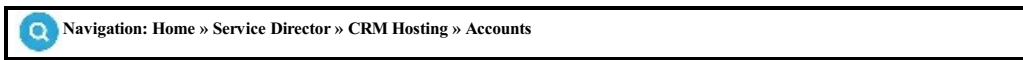
Click on **Manage** for any account to show options to manipulate and manage corresponding CRM account.

The list displays the following:

1. **Subsc. ID:** This is unique ID assigned to the subscriptions.
2. **Organization:** It displays following:
    i. **Name:** Title or name that is displayed.
    ii. **Package:** It displays the CRM package in use.
    iii. **URL:** Address of newly created site.
3. **Users:** Number of subscribed users against the site.
4. **Customer:** It displays customer name.
5. **Owner:** It displays the owner of customer.
6. **Options:** Click on **Manage** to manage CRM service.

Hosted CRM Service Management

Orchestration Module for Microsoft CRM activates rich web based interface for the management of hosted CRM service. Using the web interface the provider and the end-user may perform routine management task without the need of going at the CRM server or active directory.

Navigate to the following path:

Navigation: Home » Service Director » CRM Hosting » Accounts

Click on **Manage** from options. You will see the following four tabs:

1. **General Settings:** Click on **Put on hold** button to put it on hold. You can view general and service info for CRM account. You can synchronize business units by clicking on the button.
2. **CRM Organizations:** Click on **Connect to CRM organizations** link to view CRM Organizations.
3. **Domains:** You can view and add new domains to CRM account.
4. **Business Units:** you can also add Business Units.
5. **Users:** You can add new users to CRM account.
6. **Group Actions:** You can view group actions performed on CRM account.

Sync from CRM

You can also perform sync from backend for Business Units and USers. To sync from CRM navigate to the following path:

Navigation: Home » Service Director » CRM Hosting » Accounts

Click on **Manage** in front of the CRM account for which you want to manage CRM Services. Under **General Settings** tab **Click to Sync Business Units** and **Click to Sync Users**.

Viewing CRM Organization

To view CRM Organization navigate to the following path:

Click on the **CRM Organization** tab. Click here to see how to add new organization.

Interface shows the following:

1. **Title:** This is the name or title of organization.
2. **URL:** Corresponding URL of the CRM organization.
3. **Manager:** User in charge for CRM organization.
4. **Manager Email:** Specifies email address of manager.
5. **Status:** Shows if the particular organization is enabled or disabled.
6. **CRM:** Connect to CRM Organization, this will direct and connect to the corresponding organization.

Add CRM Organization

To add CRM Organization navigate to the following path:

Click on the **Display Name** and then **CRM Hosted Organizations** tab.

Note: You may disable or even delete an organization by clicking on disable or delete based upon the requirement.

You can include new organizations by clicking on **Add New Organization** button.

The add new organization screen displays following:

1. **Add new Organization:** Usually you will select "Add new Organization" but in some cases you will be able to select an existing organization to mail enable. For example, if there is SharePoint enabled organization for same customer it would show in the list allowing you to enable hosted email service on it.
2. **Domain Name:** The primary SMTP mail domain name created for the organization.
3. **Manager:** Create account for the manager.
4. **Admin email:** Provide admin email address.
5. **Password:** (Must be alpha-numeric. Example: 1PassW0rD)
6. **Confirm Password:** Retype address.
7. **Organization Display Name:** The active directory name of the organization. With the name an active directory organizational unit is created for the organization.
8. **Organization Unique Name: This is the unique name of the organization.**
9. **Language:** Select Language.
10. **First Name:** Provide first name.
11. **Last Name:** Provide last name.

Fill in the necessary information regarding **User** and **CRM** and click **Save** button to continue.

Add CRM Domain

To view CRM Domains navigate to the following path:

Click on **Manage** and select **Domains** tab.

1. **Domain:** It shows the CRM domain name.
2. **Default:** It shows that whether it is default or not.
3. **Options:** If you want to set it as default the click on **Set Default**. Click on **delete** link to delete the CRM domain.

To add a new domain to the CRM account.

1. **Add New Domain:** Provide domain name.
2. **Set default:** Check or uncheck it.

Click **Save** when done.

Business Units

To view and add business units navigate to the following path:

Click on **Manage** and then select **Business Units** tab. It displays the following listing:

1. **Business Unit:** Enter Business Unit name.
2. **Parent Business Unit:** Select parent business unit name.

To add a new business unit click on **Add Business Unit** button.

Viewing CRM Users

To view CRM Users navigate to the following path:

Click **Manage** in front of the CRM account for which you want to manage CRM Users. Then select **Users** tab. You can filter and search user as per your criteria.

You can add new user by clicking on **Add User** or you can **Add Bulk Users**. You can also perform **Group Actions** for CRM Users.

It will display following in the listing:

1. **User:** It shows the user display name along with email address.
2. **Details:** It shows following options:
   a. **Status:** It shows the status of the user.
   b. **User Role:** It shows the user role assigned.
   c. **Date Created:** It shows the date when it is created.
   d. **Business Unit:** It shows the business unit
3. **Options:** You have options to **Edit**, **Enable/Disable**, **Delete** and **Remove and Delete AD User** .

Add CRM User

To add a new CRM user for a CRM organization navigate to the following path:
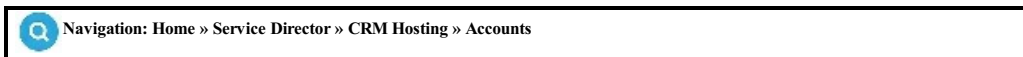
Click on **Manage** and then select **Users** tab. Click on the **Add User** button.

Note: Existing user can be modified or disabled by clicking on **Edit** and **Disable** respectively.

The add user screen displays following:

1. **User:** You may create a new user or select an existing (that is used by other services e.g. Exchange, SharePoint but not CRM) active directory user account.
2. **Display Name:** Provide display name.
3. **First Name:** Provide first name.
4. **Last Name:** Provide last name.
5. **Access Mode:** Select Access mode of user.
6. **CAL Type:** Select CAL type.
7. **Business Unit:** Select business unit
8. **User Role:** Select the user role you wish to assign to the new user.
9. **Email:** This is the email address where CRM account email is sent.
10. **Password:** Provide password.
11. **Notes:** Provide notes.
12. **Send Email:** Check this to send and email notification and provide email address.

Click on the **Save** button when done.

Group Actions

To view Group Actions, navigate to the following path:

To search for the Group actions

1. **Customer ID:** It is the customer id.
2. **Customer Name:** It is the customer name.
3. **Owner:** It is the owner.
4. **Organization:** It is the name of the organization.
5. **Command:** It is the command on which group action is to be performed.
6. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.

Click **Reset Tries Count** to automate provisioning process once the tries count reached '10'. You can also **Clear Completed/Cancelled Jobs**. It displays the following listings:

1. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.
2. **Command:** It is the command on which group action is to be performed.
3. **Date:** It displays the date.
4. **Entered Tries:** It shows the number of entered tries.
5. **Last Tried:** It displays the last try.
6. **Customer ID:** It is the customer id.
7. **Customer Name:** It is the customer name.
8. **Owner:** It is the owner of the exchange.
9. **Added by:** It displays the name of the employee .
10. **Option:** You can manually click on RUN link for failed items. You can change password.

Hosted CRM Plan Management

Orchestration Module for Microsoft CRM allows you to add CRM hosting products for your customers. Hosted CRM plans are created through powerful Service Plan Wizard. It includes following:

1. Reseller Product Listing
2. Customer Product Listing
3. Add-ons Management

To create a hosted CRM plan, navigate to following path:

> 🔍 **Navigation: Home » Service Plans » CRM**

Note: You can also edit existing hosted CRM plans by clicking on the **Edit** link.

Click **Add New Product** button. When the page loads, you will see the following settings.

1. **Product Type:** Select **CRM Hosting Product** from the drop-down list.
2. **Product Name:** Enter the name of your product.
3. **Provider:** Select the version CRM Server.
4. **Server Group:** Select the server group where this service plan's user accounts will be setup.
5. **Language:** Select Language of the server.
6. **Is Active:** Select No if you want to disable this product selling.
7. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
8. **Associate Addon:** You may want to associate add-on with this product. Your choices are:
   a. Optional
   b. Required
   c. Suppressed
9. **Date:** This is date set by the system (not editable).
10. **Sync sold plan resources:** Check this option in order to Sync resources to sold existing subscriptions associated with the package. **Note:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings. Skype4B plan or addon is not updated if it is assigned to user already.
11. **Enabled For Commission Reseller(s):** If you check this option the Customer Product Plan will be enabled for Commission type Resellers. (Visible only if Commission Type Reseller option is enabled in Built-in Module.)
    i. All Resellers
    ii. Select Resellers
12. **Product Comments:** Enter any comments you want to associate with this product. These comments show up on the store-front when this product is selected.

Once you click the **Next** button you will be presented with series of forms to configure your product.

Resources: On step-2 you will set the CRM resources for the plan.

Payment Cycles: This form lets you select Payment Cycles for the plan. You must select at least one payment cycle and payment group.

Select the payment cycle and click right arrow button to move it to *Selected Cycles* list.

Select the payment group and click right arrow button to move it to *Selected Payment Groups* list.

Price Group: This form lets you set prices for the Payment Cycles and Payment Groups you have selected in the previous step. Here you may set:

a. Setup Price
b. Price
c. Discount

Enter prices in each box.

Possible Product Upgrade / Downgrade: Here, you can configure the upgrade and downgrade behavior of this product. When a product is purchased, your client may perform upgrade/downgrade from their control center without your involvement.

Associate Addon: This form lets you associate add-on with your hosting plan. Your client may buy these addon using online store or order them through their customer control center.

Click **Finish** button to complete product setup.

SPLA Report

To view SPLA Report you have to navigate to the following path:

You can see the following details SPLA report in CRM.

To export to excel click **Export to Excel** button.

1. **Organizations**
    i. **Active:** Shows number of organizations in active state.
    ii. **Suspended/Disabled:** It shows the number of organizations suspended/disabled.
    iii. **Total :** It shows the total number of organizations.
2. **Users**
    i. **Enabled Users:** It shows the enabled users in CRM
    ii. **Disabled Users:** It shows disabled number of users.
    iii. **Total:** It shows total number of users.
3. **Access Mode**
    i. **Read Write :** It shows the number read write access mode.
    ii. **Administrative:** It shows the number of administrative access mode.
    iii. **Read Permission:** It shows the number of read permission access mode.
    iv. **Total:** It shows the total number of access mode.
4. **CAL Type**
    i. **Full Access:** It shows the number of full access CAL.
    ii. **Administrative:** It shows the number of administrative CAL.
    iii. **Limited:** It shows the number of limited CAL.
    iv. **Device Full:** It shows the number of device full CAL.
    v. **Device Limited:** It show the number of device limited CAL.
    vi. **Total:** It shows the total number of CAL.

CRM Usage Report

To view the Usage Report for CRM navigate to the following path:

Click on **Export to Excel** button to export the usage report to excel. The list displays the following:

1. **Customer:** It displays the customer name.
2. **Organization Name:** It displays the name of the CRM organization. To manage service click on the organization name.
3. **Domain Names:** It shows the display name of the customer.
4. **Owner:** It displays the owner name.
5. **Display name:** It shows the display name of the customer.
6. **Organization URL:** It shows the organization URL.
7. **Enabled Users:** It shows the no of enabled users.
8. **Disabled Users:** It shows the no of disabled users.
9. **Total Users:** It shows the total no of users.
10. **Domains:** It displays the no of domains.

Orchestration Module for Microsoft Skype for Business

Control Panel allows Hosted Skype for Business Service through its Orchestration Module for Microsoft Skype for Business. Control Panel Automation Module for Skype for Business is designed for all sizes of service providers wanting to start or grow their Hosted Skype4B business while minimizing ongoing support costs.

Control Panel Orchestration Module for Microsoft Skype for Business fully automates and controls service delivery for Microsoft Skype for Business 2019 and its legacy versions, manages billing and provides self service control panel to your customer.

1. Microsoft Lync server 2010
2. Microsoft Lync 2010 Hosting Pack
3. Microsoft Lync 2013
4. Microsoft Lync 2013 Hosting Pack
5. Skype for Business 2015
6. Skype for Business 2019

Note: Please make sure you have subscribed to Orchestration Module for Microsoft Skype for Business to avail this service otherwise you won't be able to utilize this feature. If you have any questions or want to avail this feature, please contact your service provider.

Skype4B Server Groups Overview

With Control Panel you may organize your Skype for Business servers in groups. The groups are particularly effective for segregating Skype for Business servers based on their providers or roles/capacity. For example, you may want to reserve couple of servers for Resellers only. You can do this by creating a server group and then adding those servers to that group.

Example:

1. Create a server group called **Reseller Skype4B Server Group**
2. Choose appropriate provider for e.g. **Skype for Business 2019**
3. Add server(s) to this Server Group. These are actual servers where Skype for Business FEPools are installed and will be provisioned.
4. Create a hosting plan "Skype4B Premium Hosting" and assign **Reseller Skype4B Server group** to this package.

Now, when you sell Skype4B Premium Hosting, Control Panel will automatically provision the hosted Skype for Business service on of the member server(s) based on type of load balancing you have selected for server group.

Viewing Skype4B Server Groups

To view/manage Skype4B server groups navigate to the following path:

To [add a new server group](#) click on **Add Server Group**button. The list of server groups displays following:

1. **Enabled:** Tick means Yes.
2. **Server Group Name:** Friendly name.
3. **Provider:** Indicates the Skype4B server provider for this server group.
4. **Options:** Following are the options:
   a. **Add Front End Pool:** Click to add a new FE Pool.
   b. **Disable:** You can disable you Skype4B Servers by clicking on the Disable link.
   c. **Edit:** Click on this link to edit server group properties.
   d. **Remove:** Click to remove server group. You cannot remove a server group if there are active servers with active subscriptions.

Skype for Business Server Groups Management

To view/manage Skype for Business server groups navigate to the following path:

To add a new server group click on **Add Server Group** button.

In **Step-1** complete the form by:

1. **Server Group Name:** Entering friendly name for Server Group.
2. **Provider:** Select Provider.
3. **Active Directory Domain:** Selecting appropriate Active Directory Domain.
4. **LDAP URL:** Specifying LDAP URL where hosted organizations and users will be created.
5. **Connection string of CDR database:** Provide connection string of CDR database. Click "Test Connection".
6. **Time Zone:** Select time zone.
7. **Default Domain:** Provide default domain. This must be a valid active and registered domain or otherwise leave blank.
8. **Meet URL options:** Select any one of the three options. For more details: http://technet.microsoft.com/en-us/library/gg425874.aspx
9. **Fill Style:** Select from one of the two options.
    a. **Least Filled First:** Setup hosting on the group member who is least filled.
    b. **One-by-One:** Setup hosting on group members in circular manner.
10. **Enabled:** If unchecked, system will not provision any accounts on the server group members.
11. **Override Domain Credentials:** You can check this option and use credentials other than the one mentioned in the Active Directory Domain.

Then click on the **Next** button.

Skype for Business Server Groups Member Management

To view/manage Skype for Business server groups navigate to the following path:

To add a new server click on **Add Front End Pool** and provide Front End pool information:

1. **Front End pool FQDN:** Provide Front End pool FQDN. (You can get the pool name by running **Get-CSPool** on Skype4B management shell)
2. **Application Server FQDN:** Enter Application Server FQDN.
3. **IP of Skype4B Front End server**. Enter comma separated IP's of all Front End Server(s) associated with above Front End Pool.
4. **FQDN of Persistent Chat:** Enter the FQDN of Persistent Chat server.
5. Enter the IP(s) of **Director Server**.
6. **Access Edge Service FQDN**: Enter the Access Edge Service FQDN.
7. **Handle DNS:** Checkbox to handle DNS.
   a. Select primary DNS server>
   b. Apply DNS template

In **User Limit** Section for all thee cases specify number of **Current number of users** and **Maximum number of users** to be created on this server.

Click on **Finish** button to add the server.

Viewing Skype4B Accounts

To view Skype4B accounts navigate to the following path:

You can search your Skype4B account by its account status such as **All**, **Active**, **Suspended** and **Graced**.

It displays the following listing:

1. **Status:** It shows the status of Skype4B account.
2. **Subsc.ID:** It shows the subscription id.
3. **SIP Domain:** It shows the SIP domain name
4. **Organization Name:** It shows the organization name of the Skype4B account.
5. **Package:** It shows the name of Package in use by account.
6. **Users:** It displays the no of users.
7. **Customer ID:** It displays the customer id along with customer name.
8. **Owner:** It displays the owner name.
9. **Options:** Click on **Manage** link to manage services for Skype4B account.

Hosted Skype4B Service Management

Orchestration Module for Microsoft Skype for Business activates rich web based interface for the management of hosted Skype4B service. Using the web interface the provider and the end-user may perform routine management task.

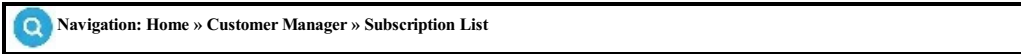To view Skype4B accounts navigate to the following path:

Click on **Manage**. Here you can see the following tabs:

1. **General Settings:** You can view the general and the service summary.
2. **Domains:** You can [add new domains](#) to your Skype4B account.
3. **Users:** You can [add new users](#) & [add bulk users](#) to your Skype4B account.
4. **Federation Settings:** You can also define [federation settings](#).
5. **Phone numbers:** You can view [Phone numbers](#) for Skype4B account.
6. **Persistent Chat Service:** You can [add category](#) and [add chat rooms](#) to your Skype4B account.
7. **Response Groups:** You can [add Groups](#), [Queues](#) and [Workflows](#) under response groups tab.
8. **Group Actions:** You can view Group Actions that are performed.
9. **Contacts:** You can [add contacts](#) for Skype4B accounts
10. **Meeting Rooms:** You can [enable CS meeting rooms](#).

Skype4B Organizations

You can view all the details of products/services by navigating to the following path and clicking on the subscription name you wish to check details of.

Navigation: Home » Customer Manager » Subscription List

Once you click the subscription name you will be on following navigation path:

Navigation: Home » Customer Manager » Subscription List » Subscription Detail

Select **Skype4B Organization** tab. You will be able to view the following listing:

1. **Status:** It shows the status of the subscription.
2. **Organization Name:** It displays the organization name.
3. **Users:** It displays the no. of users.
4. **Options:** Click on the **Manage** link to manage services of the lync account.

Adding domain to Skype4B

To view and add new domain to your Skype4B accounts navigate to the following path:
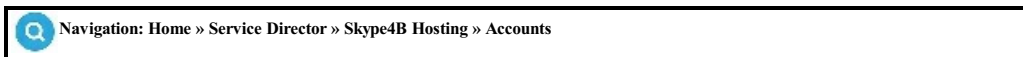
Click on **Manage** and select **Domains** tab.

It displays the following listing:

1. **Domain:** It shows the domain name.
2. **Default:** It shows that the domain is default or not.
3. **Options:** You can **Delete** or **Set As Default** your domain.

Enter new domain name in Add New Domain field and click on **Add New Domain** button.

Viewing User

To add user to Skype4B accounts navigate to the following path:
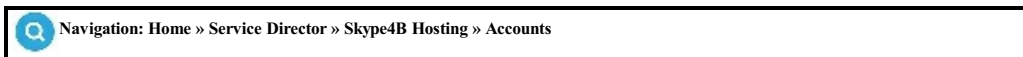
Click on **Manage** link and select **Users** tab.

Click on **Add New User** button or click **Add Bulk Users**. You can add a linked user by clicking on **Add Linked User** button. First specify **Linked AD Settings.**

You can also perform **Group Actions** for bulk users. You can perform **Fix Security permissions** for Users.

It shows following listing for each user:

1. **User:** It shows the user display name and SIP address.
2. **Details:** It shows following details for each user:
    i. **Status:** It shows status of users such as disabled.
    ii. **SIP Address:** It shows the SIP address.
    iii. **SPLA Type:** It shows the SPLA type of the user
    iv. **Package/Addon:** It shows the Package/Addon name in use
    v. **Date Created:** It show the date when it is created.
3. **Options:** It shows following options:
    i. **Edit:** You can edit and manage following on a Skype4B user.
        a. Change Package/addon of a User and other setting such as display name SIP address and Voice policies etc.
        b. Reset Password
        c. Activate Unified Messaging
        d. Specify conferencing PIN
    ii. Disable
    iii. Clone
    iv. Remove
    v. Remove and Delete AD User.

Adding User to Skype4B

To add user to Skype4B accounts navigate to the following path:

> 🔍 **Navigation: Home » Service Director » Skype4B Hosting » Accounts**
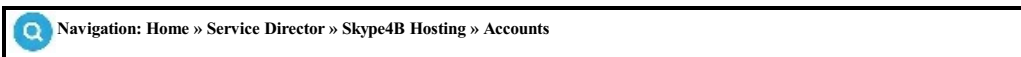
Click on **Manage** and select **Users** tab. Click on **Add New User** button.

Fill in the following field in *Add User* section

1. **Package:** Select package.
2. **Enable Existing Active Directory users:** Select user from the drop down list.
3. **Full Name (Display name):** Enter your full name.
4. **Sign-in-Name:** Enter your sign-in name.
5. **SIP Address:** Provide your SIP address.
6. **Password:** Generate Random (Must be alpha-numeric. Example: 1PassW0rD)
7. **Confirm password:** Retype password.
8. **Line URI:** Select Line URI for enterprise voice packages. For each user you can define phone numbers with extensions. Phone numbers can be either local or global. In Line URI, specify the telephone number of the user. Private extensions can only be dialed from within the organization. **Extension:** Provide Extension.
9. **Private Line:** Provide Phone number for private line. **Extension:** Provide Extension.
10. **Dial Plan:** Select Dial plan
11. **Voice Policy:** Select voice policy
12. **Enable Voice Mail Policy:** Check box to enable voice mail policy.
13. **Conferencing Policy:** Select conferencing policy.

Fill in the field under *Send setup Email* section.

1. **Send Email:** Check if you want to setup send email.
2. **Email Address:** Provide email address

Note: The Line URI, Private Line, Voice policy and conferencing policy options will appear ONLY if you select "Enterprise Voice plan".

Optional Fields

Fill in the following field in *Optional fields* section. These are optional:

1. **Initials:** Provide initials if any.
2. **First Name:** Provide first name of the user.
3. **Middle Name:** Provide middle name of the user.
4. **Last Name:** Provide last name of the user.
5. **Street Address:** Provide street number.
6. **City:** Provide the name of the city.
7. **State/Province:** Provide the name of the state/province.
8. **Zip/Postal Code:** Provide zip/postal code.
9. **Country:** Provide the name of the country.
10. **Mobile:** Provide mobile number.
11. **Fax:** Provide fax number.
12. **Phone (Business):** Provide office phone number.
13. **Phone (Home):** Provide home phone number.
14. **Pager:** Provider pager address.
15. **Web Page:** Provide web page URL.
16. **Description:** Provide description of the user.

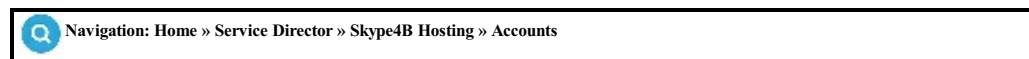Fill in the following fields under *Organization* section.

1. **Job title:** Provide job title.
2. **Company:** Provide company name.
3. **Department:** Provide department name
4. **Office:** Provide office name.

Then click on **Save** button.

Note: You can also [add bulk users](#) to your Skype4B account.

Adding Bulk User to Skype4B

To add bulk user to Skype4B accounts navigate to the following path:

Click on **Manage** and select **Users** tab. Click on **Add Bulk User** button.

1. **Package:** Select package from the drop down list for which you want to import bulk user.
2. **Select User:** You can select one of the following options:
    a. Create new using CSV
    b. Skype4B enabled Active Directory users
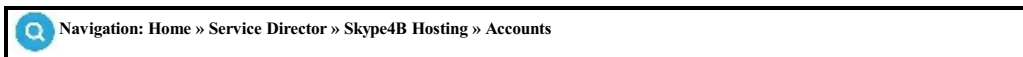3. **CSV file to import:** Browse to select a csv file.

Then click on **Next** button.

Send Setup Email: Check this option if you want to send emails too.

Click on **Save** button when done.

Edit Skype4B User

To Edit user of a Skype4B account navigate to the following path:

Click on **Manage** and select **Users** tab. From Options column click **Edit** in front of a User.

Under **General** tab you can change following for a User:

1. **Package:** You can change package/addon.
2. **Full Name (Display name):** Change full name.
3. **Sign-in-Name:** You can change your sign-in name.
4. **SIP Address:** You can change your SIP address.
5. **Line URI:** You can change Line URI for enterprise voice packages. For each user you can define phone numbers with extensions. Phone numbers can be either local or global. In Line URI, specify the telephone number of the user. Private extensions can only be dialed from within the organization. **Extension:** You can change Extension
6. **Private Line:** You can change Phone number for private line. **Extension:** You can change Extension.
7. **Dial Plan:** You can change Dial plan
8. **Voice Policy:** You can change voice policy
9. **Enable Voice Mail Policy:** Check box to enable voice mail policy.
10. **Conferencing Policy:** You can change conferencing policy.

Fill in the field under *Send setup Email* section.

1. **Send Email:** Check if you want to setup send email.
2. **Email Address:** You can change email address

Click **Save** when done.

Set Password for Skype4B

To set/reset password of Skype4B user navigate to the following path:

Click on **Manage** and select **Users** tab. From Options column click **Edit** in front of a User.

Under **Set Password** tab:

1. **Password:** Generate Random (Must be alpha-numeric. Example: 1PassW0rD)
2. **Confirm password:** Retype password.
3. **Send Email:** Check if you want to setup send email.
4. **Email Address:** Provide email address

Click **Save** when done.

Unified Messaging for Skype4B

To activate Unified Messaging of a Skype4B user navigate to the following path:
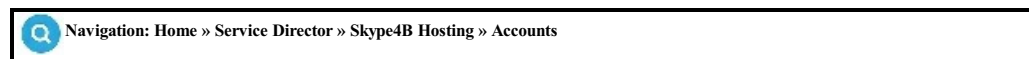
Click on **Manage** and select **Users** tab. From *Options* column click **Edit** in front of a User.

Select **Unified Messaging** tab and click **Activate.**

Conferencing PIN

To specify conferencing PIN for a Skype4B user navigate to the following path:

Click on **Manage** and select **Users** tab. From Options column click **Edit** in front of a User.

Select **Conferencing PIN** tab and provide **Dial-in Conferencing PIN**. Then click on **Save** button.

You can also **Lock /UnLock PIN** by clicking respective button.

Federation Settings

To view Skype4B accounts navigate to the following path:

Click on **Manage** and select **Federation Settings** tab.

You can **Sync Allowed Domain** from backend. You can view the following listing under Federation settings tab:

1. **Domain Name:** This shows the domain name.
2. **Options:** You can remove the domain by clicking on the remove link.

Click **Add Domain** to add a new domain or **Add Bulk Domains**.

Fill in the following fields for the federation/domain.

1. **Domain Name:** Provide the domain name.
2. **Access Edge Service (FQDN):** Provide the Access edge service (FQDN).
3. **Comments:** Provide comments (if any).

Click on **Save** button when done.

Viewing Phone numbers

To phone numbers added to Skype4B accounts navigate to the following path:

Click on **Manage** and select **Phone Numbers** tab.

Click **Import Numbers** to import new phone numbers. Following Options are available:

1. **On Fly:** Add new number on fly.
    i. Checkbox to hide user/workflow interface if you want to hide numbers.
    ii. Select Country
    iii. Select region
    iv. Select type
    v. Provide numbers
2. **Available Pool:** Select available numbers from pool.
3. **CSV file to Import:** Click select file.

Select any one of the above options. Click **Next** and then click **Save** the selected numbers. Phone numbers will be added to the listing. It displays the following columns:

1. **Status:** It shows the status of phone number as Available or Leased.
2. **Phone number:** It displays the phone number.
3. **Assigned To:** It shows to which it is assigned.
4. Hide from user/workflow interface.

Persistent Chat Feature

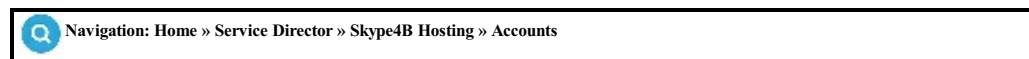To view/manage Skype4B persistent chat feature, navigate to the following path:

Click **Manage** in front of the Skype4B account and select **Persistent Chat** tab. You can add & manage **Chat categories** and **Chat rooms** under **Persistent Chat** tab.

Adding Category

To add category to Skype4B accounts navigate to the following path:

Click on **Manage** and select **Persistent Chat** tab and then Select the **Chat Categories** tab:

Fill in the following fields to add a category to Skype4B account.

1. **Category Name:** Provide organization name - category name.
2. **General Settings:** Check the following options, if you want to enable.
    a. Enable Invitations
    b. Enable File Upload
    c. Enable chat History

Chat Room creators:

1. **Entire Organizations:** Checking this option will allow everyone to create chat rooms
2. **Users:** Select Users.

Chat Room Access

1. **Entire Organizations:** Checking this will allow everyone to access chat rooms within this category.
2. **Users:** Select Users.

Adding Chat Rooms

To add chat room(s) to Skype4B accounts navigate to the following path:
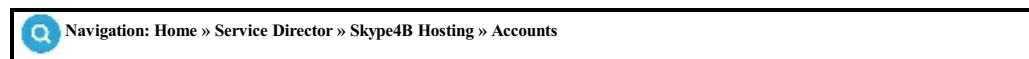
Click on **Manage** and select **Persistent Chat** tab and then click on **Chat Room** tab:

Fill in the following fields to create chat rooms.

1. **Chat Room name:** Provide the name of the chat room.
2. **Select category:** Select category from the dropdown list.
3. **Type:** Select Normal or Auditorium.
4. **Disabled:** Checking this option will disable the chat room.
5. **Members:** Provide the list of members.
6. **Managers:** Provide the list of managers.
7. **Presenters:** Provide the list of presenters.

Viewing Groups

Agent groups contain a specified set of user accounts, that belong to a "Response group", how calls are Routed in the group, and what options a member has, are configured at the agent group level.

To view Groups, navigate to the following path:

Click on **Manage**. Under **Response Group** tab, click on **Groups** tab you will see the following:

To add a new Group click on **Add New Group** button

1. **Group name:** It displays the name of the group.
2. **Participation Policy:** It displays the participation policy such as formal or informal etc.
3. **Routing Method:** It displays the routing method such as longest Idle etc.
4. **Description:** It shows the description of the group.
5. **Options:** You can Edit or Remove the group from the listing by clicking on the respective link.

Adding a Group

To add a new Groups, navigate to the following path:

Click on **Manage.** Under **Response Group** tab, click on **Groups** tab you will see the following:

To add a new Group, click on **Add New Group** button and fill in the following fields:

1. **Group name:** Provide a friendly name for a group.
2. **Description:** Provide a detailed description of the group.
3. **Participation Policy:** Select the participation policy from dropdown list as formal or informal.
4. **Alert Time (in seconds):** You must enter a numeric value between 10 to 600 for alerts.
5. **Routing Method:** Select routing method from the drop down list.
6. **Agents:** Select to define a new group or select an existing distribution group.
7. **Agents:** Select existing groups as agents.

Click on **Save** when done.

Viewing Queues

A queue is an object that holds Callers as they dial in to the "response group".

To view queues navigate to the following path:

Click on **Manage.** Under **Response Group** tab, click on **Queues** tab. To add a new Queue click on **Add New Queue** button.

It will display the following listings:

1. **Queue Name:** It shows the name of the queue.
2. **Description:** It displays the description of the queue.
3. **Options:** You can Edit or Remove the queues from the listing by clicking on the respective link.

Adding a Queue

A queue can contain multiple agent groups, or sometimes just a single agent group is included. Settings such as time Outs, and call capacity are configured at the queue level.

To add a queue navigate to the following path:

Click on **Manage**. Under **Response Group** tabs, click on **Queues** tab. To add a new work flow click on **Add New Queue** button.

1. **Queue Name:** Enter a friendly queue name.
2. **Description:** Enter a detailed description of the queue.
3. **Groups:** Select appropriate groups from the available box.
4. **Enable queue time-out:** Check if you want to enable queue time out.
    a. **Time-out Period (in seconds):** You must enter a numeric value between 10 to 65535.
    b. **Actions:** Select an action from the drop down list.
5. **Enable queue overflow:** Check if you want to enable queue overflow.
    a. **Maximum Number of Calls:** Provide maximum number of calls. You must enter a numeric value between 0 to 1000.
    b. **Forward the Call:** Select when to forward a call.
    c. **Call Action:** Select an appropriate action to be applied on a call.

Click on **Save** button when done.

Viewing Work Flows

Workflows ties together the agent groups and queues. The workflow settings determine how a caller reaches a specific queue depending on question responses, time of day, or holidays.

To view work flows navigate to the following path:

Click on **Manage**. Under **Response Group** tab, click on **Workflows** tab you will see the following:

To add a new workflow click **Add New Workflow** button. To manage a holiday set for the workflow click **Manage Holiday Sets** button. To manage business hours for the workflow click **Manage Business Hours** button.

1. **Workflow Name:** It displays the name of the workflow.
2. **Active:** It shows that the work flow is active or not.
3. **Template:** It shows the name of the response group template.
4. **Address:** It displays the address of the workflow.
5. **Language:** It displays the language of the workflow.
6. **Managed:** It displays that it is managed workflow or not.
7. **Options:** You can *Edit* or *Delete* the workflow form the listing by clicking on the respective link.

Adding a Workflow

Workflows ties together the agent groups and queues. The workflow settings determine how a caller reaches a specific queue depending on question responses, time of day, or holidays. To add work flows navigate to the following path:
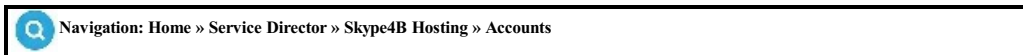
> 🔍 **Navigation: Home » Service Director » Skype4B Hosting » Accounts**

Click on **Manage**. Under **Response Group** tab, click on **Workflows** tab. To add a new work flow click on **Add New Workflow** button.

There are two types of work flows that are supported in Control Panel Hunt groups, and interactive groups.

A. Hunt Group:

Simple routing to a hunt group you define and additional settings such as welcome message, availability, and music on hold.

B. Interactive:

In addition to Hunt Group settings, you can specify up to two levels of questions that callers will hear. Each question can have up to four possible answers.

Under Hunt Group or IVR Group Section, Please provide the following details:

1. **Display name:** Enter a friendly name of the workflow.
2. **Activate the workflow:** Check if you want to enabled this workflow group.
3. **Enable for federation:** Check if you want to be enabled for federation.
4. **Enable agent anonymity:** Check if you want to enable agent anonymity. If you enable agent anonymity, some call modalities will be disabled.
5. **SIP Address:** Enter SIP address or domain name
6. **Telephone Number:** Provide telephone number and extension.
7. **Display Number:** Provide the number which is displayed.
8. **Description:** Enter description of the workflow group.
9. **Workflow Type:** Select the workflow is managed or unmanaged.

Select Language for the workflow under *Language Selection* Section.

Configure welcome message under *Welcome Message* section.

Select a music file when the when the call is on hold under *Music on Hold* section.

Configure IVR responses under *IVR Responses* section.

1. **Play a welcome message. Choose the message format:** Check this box to configure a welcome message.
2. **Configure Welcome Message:** Choose on of the following:
   a. Use text-to-speech
   b. Select a recording

Manage Holidays Sets

To configure a holiday set from *Holidays* Section.

1. **Standard holiday lists:** Select the holiday set which is already defined from the drop down list.
2. **Play a message during holidays:** Select message to be displayed during holidays.
3. **Outside of business hours, process call as follows (after the message has played, if you have configured one):** Define how to process a call.

Manage Business Hours

Define business hours for a workflow under **Business Hours** section.

1. **Time zone:** Select time zone for a workflow from the dropdown list.
2. **Configure the business hours schedule:** Select one of the following:

   i. **Use a preset schedule:** Select a predefined schedule from the dropdown list.
   ii. **Use a custom schedule:** Define a new schedule.
     a. **To edit or add hours of operation, type in your opening and closing times:** Select days and define open and close hours.

3. **Play a message when the response group is outside of business hours:** Check the option if you want to know when the response group is outside of business hours

4. **Outside of business hours, process call as follows (after the message has played, if you have configured one):** Select a process for call.

Managing Holiday sets
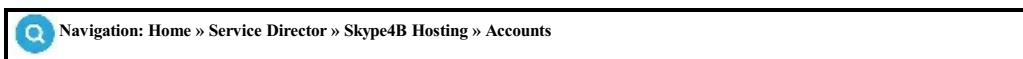
To manage holiday sets, navigate to the following path:

Click on **Manage**. Under **Response Group** tab, click on **Workflows** tab:

Now click on **Manage Holiday Sets** button.

Select a holiday set from the dropdown list or click **Add Holiday Set** button and define a new holiday set:

1. **Holiday Set Name:** Enter Holiday set name.
2. **Holiday Name:** Define a new holiday.

Click on **Add Holiday** button when done and **Save** the settings.

Managing Business Hours

To manage business hours, navigate to the following path:

Click on **Manage**. Under **Response Group** tab, click on **Workflows** tab:

Now click on **Manage Business Hours** button. It display following listing:

1. **Name:** It shows the name of the business hour.
2. **Options:** You can edit and delete your business hours.

Select the day for your business hour and provide timings for opening and closing in front of the week day.

Provide the name of the business hour.

Group Actions (Skype4B)

To view Group Actions, navigate to the following path:

To search for the Group actions

1. **Customer ID:** It is the customer id.
2. **Customer Name:** It is the customer name.
3. **Owner:** It is the owner.
4. **Organization:** It is the name of the organization.
5. **Command:** It is the command on which group action is to be performed.
6. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.

Click **Reset Tries Count** to automate provisioning process once the tries count reached '10'. You can also **Clear Completed/Cancelled Jobs**. It displays the following listings:

1. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.
2. **Command:** It is the command on which group action is to be performed.
3. **Date:** It displays the date.
4. **Entered Tries:** It shows the number of entered tries.
5. **Last Tried:** It displays the last try.
6. **Customer ID:** It is the customer id.
7. **Customer Name:** It is the customer name.
8. **Owner:** It is the owner of the exchange.
9. **Added by:** It displays the name of the employee .
10. **Option:** You can manually click on RUN link for failed items. You can change password.

Viewing Contacts

To view Contacts navigate to the following path:
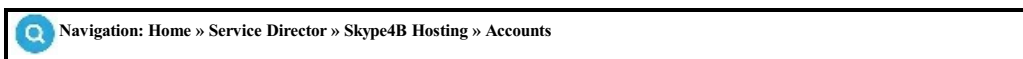
Click on **Manage** and select **Contacts** tab. You can provide any of below field and and click **Search** to search contacts.

1. Display name
2. Email Address
3. SIP Address
4. Phone number

To add a new contact click **Add Contact** or you can also **Add Bulk Contacts.**

It shows following listing for contacts:

1. **Display name:** It shows the display name of the contact.
2. **External email:** It shows the external email address.
3. **SIP Address:** It shows the SIP address.
4. **Phone number:** It shows the phone number.
5. **Status:** It shows the status of the contact.
6. **Options:** You can **delete** the contact from options.

Adding a Contact

To add new Contacts navigate to the following path:
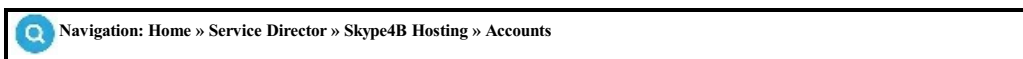
Click on **Manage** and select **Contacts** tab. To add a new contact click **Add Contact** and provide following:

1. **Display name:** Provide display name of contact.
2. **External email:** Provide external email address.
3. **SIP Address:** Provide SIP address.
4. **Phone number:** Provide phone number.

Click **Add Contact** when done.

or you can also **Add Bulk Contacts** by selecting CSV file to import bulk contacts.

Enable Meeting Rooms

To enable meeting rooms navigate to the following path:

Navigation: Home » Service Director » Skype4B Hosting » Accounts

Click on **Manage** and select **Meeting Rooms** tab.

Click on **Enable CS Meeting Room**. Select resource from the dropdown list and click **Enable**.

Skype4B Hosting Plan Management

Orchestration Module for Microsoft Skype4B allows you to add Skype4B hosting products for your customers. Hosting Plans are created through powerful Service Plan Wizard. It includes following:

1. Reseller Product Listing
2. Customer Product Listing
3. Add-ons Management

To create a hosting plan navigate to following path:

> **Navigation: Home » Service Plans » Skype4B**

Note: You can also edit existing Skype4B hosting plans by clicking the **Edit** link at desired plan that you want to modify.

Click **Add New Product** button. When the page loads, you will see the following settings.

1. **Product Type:** Select **Skype4B Hosting** from the drop-down list.
2. **Product Name:** Enter the name of your product.
3. **Provider:** Select provider.
4. **Server Group:** Select Server Group.
5. **Is Active:** Select No if you want to disable this product selling.
6. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
7. **Associate Addon:** You may want to associate addon with this product. Your choices are:
   a. Optional
   b. Required
   c. Suppressed
8. **Associate Domain:** Select how you want to associate domains with this product. Your choices are:
   i. Optional
   ii. Required
   iii. Suppressed
9. **Profit to add on call cost:** Provide percentage of profit to add on a Call Cost.
10. **Date:** This is date set by the system (not editable).
11. **Sync sold plan resources:** Check this option in order to Sync resources to sold existing subscriptions associated with the package. **Note:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings. Skype4B plan or addon is not updated if it is assigned to user already.
12. **Enabled For Commission Reseller(s):** If you check this option the Customer Product Plan will be enabled for Commission type Resellers. (Visible only if Commission Type Reseller option is enabled in Built-in Module.)
    a. All Resellers
    b. Select Resellers
13. **Product Comments:** Enter any comments you want to associate with this product.

Once you click the **Next** button and specify **Resources** of your Skype4B (Lync) product.

Limits

1. Check box to **Use Common Provider Domain**
2. **No. of SIP Domains:** Enter the no. of SIP domains or check Unlimited.
3. **Maximum number of users:** Enter the maximum no. of users or check Unlimited.
4. **Automatic Provisioning:** Select to enable automatic DID provisioning.
5. **DID Specification:** Specify Country, Region, Type, Quantity etc.

Service Features

1. **Enable Line URI Extension:** Check this option to enable the line URI extension for the Skype4B account.
2. **Enable Persistent Chat Feature:** Check this option to enable the chat feature for the Skype4B account.
3. **Associate Call Bundle:** You call select Call Bundle to associate it with a Plan.
4. **SPLA Type:** Select SPLA type.

Service Policies

1. **Telephony:** You can select telephony option options from the drop down list.
2. **Dial Plan:** You can select dial plan from the drop down list.
3. **Voice Policy:** You can select voice policy from the drop down list.
4. **Conferencing Policy:** You can select conferencing policy from the drop down list.
5. **Voice Mail Policy:** You can select voice mail policy from the drop down list.
6. **Client Version Policy:** You can select client version policy from the drop down list.
7. **PIN Policy:** You can select PIN policy from the drop down list.
8. **External Access Policy:** You can select external access policy from the drop down list.
9. **Archiving Policy:** You can select archiving policy from the drop down list.
10. **Location Policy:** You can select location policy from the drop down list.
11. **Client Policy:** You can select client policy from the drop down list.
12. **Mobility Policy:** You can select Mobility policy from the drop down list.
13. **Persistent Chat Policy:** You can select Persistent Chat policy from the drop down list.

Click on **Next** button.

Payment Cycles: This form lets you select Payment Cycles for the plan.

- **Call bill frequency:** Select Call bill frequency i.e Weekly, Monthly etc.

You must select at least one payment cycle and payment group.

1. Select the payment cycle and click right arrow button to move it to *Selected Cycles* list.
2. Select the payment group and click right arrow button to move it to *Selected Payment Groups* list.

Payment Groups: This form lets you set prices for the Payment Cycles and Payment Groups you have selected in the previous step. Here you may set:

a. Setup Price
b. Price
c. Discount

Enter prices in each box.

Possible Product Upgrade / Downgrade: Here you can configure the upgrade and downgrade behavior of this product. When a product is purchased, your client my perform upgrade/downgrade from their control center without your involvement.

Associate Addon: This form lets you associate addon with your hosting plan. Your client may buy these addon using online store or order them through their customer control center.

Click **Finish** button to complete product setup.

Phone Numbers

To add phone numbers to your Skype4B hosting account navigate to the following path:

You can export phone numbers to excel sheet by clicking on **Export To Excel** button.

Select **Import Numbers** button under **Phone Numbers** tab.

Following Options are available:

1. **On Fly:** Add new number on fly.
     i. Checkbox to hide user/workflow interface if you want to hide numbers.
     ii. Select Country
     iii. Select region
     iv. Select type
     v. Provide numbers
2. **Available Pool:** Select available numbers from pool.
3. **CSV file to Import:** Click select file.

Select any one of the above options. Click **Next** and then click **Save** the selected numbers. Phone numbers will be added to the listing.

It displays the following listing:

1. **Status:** It shows the status of phone number as Available or Leased.
2. **Phone number:** It shows the Phone Number.
3. **Country:** It shows country assigned.
4. **Assigned To:** It shows the user to user to which the number is assigned.
5. **Group name :** It shows the Phone Group name.
6. **Options:** You can remove a number from options.

Add Phone Group

To add phone group to your Skype4B hosting account navigate to the following path:

Select **Phone Group** button under **Phone Number Inventory** tab. It displays the following listing:

1. **Group name:** It shows the phone group name.
2. **Customer:** It shows the customer of the phone group.
3. **Total Numbers:** It shows the total numbers of the groups
4. **Options:** From options you can **Edit** and **Remove** the phone group.

To add a phone group click on the **Add Phone Group** button.

1. **Group name:** Enter the name of the phone group.
2. **Select Customer:** Select the customer from the drop down list.
3. **Import Numbers:** Import phone numbers.

Then click on **Save** button.

Phone Group Detail

To view phone group detail navigate to the following path:

Click on the existing group name. It displays the following listing:

1. **Phone number:** It displays the phone number.
2. **Assigned To:** It displays to whom the number is assigned.
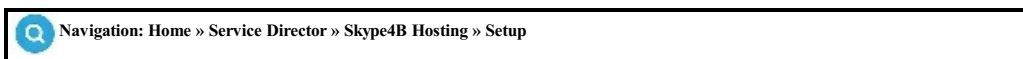3. **Options:** You can also **remove** the phone group.

To Edit the phone group click on the **Edit Phone Group** button.

1. **Group name:** Enter the name of the phone group.
2. **Select Customer:** Select the customer from the drop down list.
3. **Import Numbers:** Import phone numbers.

Then click on **Save** button.

To view phone group listings click on the **Phone Group Listing** button.

Dial Plan

To view/add dial plan to your Skype4B hosting account navigate to the following path:

Dial Plans can be created from control panel now, Following functions are available with rules in a plan

1. Add
2. Edit
3. Clone
4. Ordering (Move up/down)
5. Remove

Select **Dial Plan** tab and click on **Add Dial Plan** to create a new dial plan. It displays the following listing:

1. **Server group:** Select server name.
2. **Name:** Provide dial plan name.
3. **Simple Name:** Provide simple name.
4. **Description:** Provide description.
5. **Dial-in conferencing region:** Provide dial-in conferencing region.
6. **External access prefix:** Provide external access prefix.
7. **Associated Normalization Rules:** Following operations are available for normalization rule:
    i. **Create New Rule:** You can create a normalization rule for your **Dial Plans**. Provide following details to create a new rule:
        a. Name
        b. Description
        c. Build a Normalization Rule
        d. Starting digits
        e. Length
        f. Digits to remove
        g. Digits to add
        h. Pattern to match
        i. Translation rule
        j. Internal extension
    ii. **Clone:** You can clone a rule.
    iii. **Select:** Select rules.
    iv. **Show Details:** You can review details of the selected rule.
    v. **Remove/Remove All:** You can remove selected rules.
    vi. **Move Up/Move down:** You can move up and down the selected rules.

Conference Dial In

To add Conference Dial in phone numbers to your Skype4B hosting account navigate to the following path:

Click on **Conference Dial In** tab, click on **Add Phone Number** button and **Import** number. Then click on **Save** button.

It displays the following listing:

1. **Phone number:** It shows the Phone Number.
2. **Options:** You can remove a number from options.

Call Destinations

To view/add call destinations to your Skype4B hosting account navigate to the following path:

It displays the following listing:

1. **Name:** It displays the name of destination.
2. **Prefix:** It displays the prefix.
3. **Option:** You can remove a destination from option.

Click on **Add Destinations** button to import new destinations using a CSV file.

SIP Gateways

To view/add sip gateways to your Skype4B hosting account navigate to the following path:

It displays the following listing:

1. **Group Name:** It displays the name of destination.
2. **Total Gateways:** It displays the prefix.
3. **Option:** You can remove a gateway from option.

Click on **Add Gateway Group** button to add new Gateway Group.

1. **Group Name:** Provide name of the Gateway Group.
2. **Enter Gateways:** Provide SIP Gateways.

Call Bundles

To view/add call bundles to your Skype4B hosting account navigate to the following path:

It displays the following listing:

1. **Bundle Name:** It displays the name of bundle.
2. **Description:** It shows the description.
3. **Pulse Type:** It displays the pulse type.
4. **Option:** You can remove a bundle from option.

Click on **Add Call Bundle** button to add new bundle.

1. **Bundle Name:** Provide name of Bundle.
2. **Description:** Provide description.
3. **Pulse Type:** Select pulse type from the drop down list.
4. **Local Call Rate:** Provide local call rate.
5. **Select CSV file:** Select CSV file for the call bundle.

You can also provide Default Call rates. Click **Save** button when done.

Note: Please be patient after clicking finish button as the process may take time.

SPLA Report for Skype4B

To view SPLA report navigate to the following path:

SPLA Report

You can export SPLA report to excel sheet by clicking on **Export To Excel** button. It displays the following listing:

1. **Standard SAL:** It shows the total number of Standard SAL.
2. **Enterprise SAL:** It shows the total number of Enterprise SAL.
3. **Plus SAL:** It shows the total number of Standard SAL Plus.
4. **Enterprise Plus SAL:** It shows the total number of Enterprise Plus SAL.

SPLA Report By Customer

You can export SPLA report to excel sheet by clicking on **Export To Excel** button. It displays the following listing:

1. Owner
2. Customer
3. Standard SAL
4. Enterprise SAL
5. Plus SAL
6. Enterprise Plus SAL

Usage Report

To view Usage report navigate to the usage report.

You can export usage report to excel sheet by clicking on **Export To Excel** button. It displays the following listing:

You can search Usage report by providing following:

1. **Owner:** It is the name of the owner.
2. **Customer Name:** It is the customer name.
3. **Organization Name:** It is the organization name.
4. **Company Name:** It is the company name.

Then click on **Search** button.

Under **Organization Usage Report** tab you can view following in report:

1. **Organization Name:** It displays the name of the organization.
2. **Domain Names:** It display the domain name.
3. **Customer:** It displays the name of the customer along with id.
4. **Product Name:** It displays the product name.
5. **Owner**: It displays the name of the owner.
6. **Active Domains:** It displays the number of active domains.
7. **Users:** It displays the number of users.
8. **Phone Numbers:** It displays the phone number.

Under **User Usage Report** you can view following in report.

1. **Organization Name:** It displays the name of the organization.
2. **Customer:** It displays the name of the customer along with id.
3. **Owner**: It displays the name of the owner.
4. **Skype4B User:** It displays the users.
5. **SPLA Type:** It displays the spla type of users.
6. **Phone Numbers:** It displays the phone number.

Call Report

The Call Report provides a detailed look at an individual call. To view call report navigate to the following path:

You can export Call report to excel sheet by clicking on **Export To Excel** button. You can view Call Reports as Call Data Report, Organization Call Data Report, User Call Data Report

Under **Call Data Report** tab, it will display the following listings:

1. **Organization Name:** It displays the organization name.
2. **Total In-Bound Calls:** It displays the total In-bound Calls with the *Duration* and *Cost*.
3. **Total Out-Bound Calls:** It displays the total Out-bound Calls with the *Duration* and *Cost*.
4. **Total Internal Calls:** It displays the total Internal Calls with the *Duration* and *Cost*.
5. **Total Video Calls:** It displays the total Video Calls with the *Duration* and *Cost*.
6. **Total Cost:** It displays total cost.

Conference Call Report

The Conference Call Report provides a detailed look at an organization conference calls. To view conference call report navigate to the following path:

You can export conference call report to excel sheet by clicking on **Export To Excel** button. You can View Conference Call Reports as Conference Call Report, Organization Conference Call Report, User Conference Call Report.

Under **Conference Call Report** tab, it will display the following listings:

1. **Company name:** It shows the company name.
2. **Organization Name:** It shows the organization name.
3. **Customer Name:** It shows the customer name.
4. **dispNUM Owner:** It shoe the customer number.
5. **Total Conferences:** It shows the total number of conferences.
6. **Total Calls Duration:** It shows the total duration of the conference calls.
7. **Total Cost:** It shows the total cost.

VPS Hosting (Inventory)

Automation Module of Microsoft VPS dashboard view offers complete inventory details of your deployed Hyper-v topologies and its monitoring. This document is intended to elaborate and illustrate features Set Control Panel Hyper-v Module offer via its Dashboard View.

In order to view hyper-v servers inventory navigate to the following path:

Summary:

Server Group level resources Comparison Analytics

1. Select Server Group:
2. Memory Usage
3. Disk Usage
4. Processor Usage

Server resources Analytics

1. Select Server:
2. Memory Usage
3. Disk Usage
4. Processor Usage

Inventory

Inventory helps you keep the record of your hypervisors and bare metal from single interface. You can view the type of VM, clustered or standalone and it keeps record of the OS, Number of VM residing/running, Off, memory allocated, memory consumed and virtual processor allocated to each server with their NetBIOS name.

1. Bare Metal Inventory
2. Hypervisor Inventory

Monitoring

Under monitoring tab you can view following:

1. **Storage:** You can **view** storage of each server.
2. **CPU & Memory:** You can **view** and **update** the CPU usage and memory for each server.
3. **Services:** You can **View** and **Update** services on hyper-v servers.
4. **Event Logs:** Click **Get Logs** to get latest logs from the server.
5. **Hypervisor:** You can view details for hypervisor.

Orchestration Module for Microsoft Hyper-V

Control Panel allows Hosted VPS Service through its Orchestration Module for Microsoft Hyper-V. Control Panel Orchestration Module for VPS is designed for all sizes of service providers wanting to start or grow their Hosted VPS business while minimizing ongoing support costs.

Control Panel Orchestration Module for Microsoft Hyper-V fully automates and controls service delivery for Microsoft Hyper-V Server 2022 and its legacy versions, manages billing and provides self service control panel to your customer.

1. Microsoft Hyper-V Server 2008
2. Microsoft Hyper-V Server 2012
3. Microsoft Hyper-V Server 2012 R2
4. Microsoft Hyper-V Server 2016
5. Microsoft Hyper-V Server 2019
6. Microsoft Hyper-V Server 2022

Note: Please make sure you have subscribed to Orchestration Module for Microsoft Hyper-V to avail this service otherwise you won't be able to utilize this feature. If you have any questions or want to avail this feature, please contact your service provider.

Hyper-V Server Groups Overview

With panel you may organize your Hyper-V servers in groups. By Using Control Panel you may organize your Hyper-V Servers in groups and may create different service plans for Resellers/Customers:

 Example:

1. Create a server group called **Hyper-V Servers**.
2. Assign **Hyper-V** as the provider.
3. Create a hosting plan "**Virtual Machines Hosting**" and assign Reseller/Customers group to this package.
4. Now, when you sell Virtual Machines Hosting, Panel will automatically provision the hosted VPS service.
5. Remove Server from group. You cannot remove a server if there are active subscriptions on it.

Viewing Hyper-V Server Groups

To view/manage Hyper-V server groups navigate to the following path:

To add a new server group click on **Add Server Group** button. The list of server groups displays following:

1. **Status:** It show the status of the Server Groups.
2. **Server Group Name:** Friendly name.
3. **Provider:** It shows Vitual Machine hosting provider for this server group.
4. **Options:** Following are the options:
    i. **Add Group Member:** Click to add a new group member.
    ii. **Disable:** You can disable your Hyper-V Servers by clicking on **Disable**.
    iii. **Edit:** Click on this link to edit server group properties.
    iv. **IP Pool:** Click on the IP pool to add IP pools.
    v. **Remove:** Click to remove server group. You cannot remove a server group if there are active servers with active subscriptions.

Hyper-V Server Groups Management

To add Hyper-V server groups navigate to the following path:

To add a new server click on **Add Server Group** button.

In **Step-1** complete the form by:

1. **Server Group Name:** Entering friendly name for Server Group.
2. **Provider:** Select Provider.
3. **Active Directory Domains:** Selecting appropriate Active Directory Domain.
4. **Storage Configuration:** There are two types of storage configuration:
   a. Standalone
   b. Clustered
5. **Cluster Name:** Provide the name of cluster (It is hidden in case of standalone).
6. **Enabled:** Check this box.
7. **Virtual Machine Location:** Provide virtual machine location path.
8. **Archive deleted VHDs for:** Select Days.
9. **Deleted VHDS archive location:** Provide location for archiving of deleted machines.
10. **Add CustomerId as Prefix in VMName:** Check this option to add prolific in VM name.
11. **Override domain credentials:** Use this option if you want to use a different account for this service from what is specified in active directory domain settings. In the **Server Credentials** section fill in the following fields:
    i. **Username:** Provide Username.
    ii. **Password:** Provide password.
    iii. **Confirm password:** Retype password.

In case of clustered you need to add VHD location.

1. **VHD Path:** Provide VHD path.
2. **Max Size (GBs):** Provide size in GB's
3. **Storage Type:** Select storage type from drop down. See Storage Types
4. **Customer:** Select customers

Click **Add** when done.

Then click on the **Next** button.

Note: The Cluster option is For Hyper-V 2012 or later only with Active Directory selection. (If no active directory is selected then Storage configuration is Stand Alone and it will disable Cluster radio button. If Provider is Hyper-V Server 2008 then Storage Configuration is Stand Alone and Cluster will be disabled.

Subnet Pools

An IP Pool is associated to a VM Subnet that belong to a VM network. For each VM Subnet it is possible to create one or more IP Pool while the IP addresses in the range belong to the VM subnet.

To add an IP Pool, navigate to following path:

Navigation: Home » Service Director » Virtual Machines Hosting » Server Groups

Click **Subnet Pool** from Options column in front of a Server Group.

You can see all the existing IP Pools listed. To add a new Subnet Pool, provide below:

1. **IP Pool Name:** Provide an IP Pool name.
2. **Type:** Select type of IP pool. a). Public 2). Private
3. **Virtual Switch:** Select Virtual Switch. See Also [Virtual Switch](#)
4. **VLAN ID:** Provide VLAN ID.
5. **First IP address:** Provide starting IP **to :** ending IP.
6. **Subnet Mask:** Provide subnet Mask
7. **Gateway:** Provide gateway
8. **Assign IP Pool To Resellers:** Select resellers.

Click **Save** when done.

DNS Pool

To add a DNS Pool navigate to following path:

Select **DNS Pool** from Options column in front of the server group and provide following:

1. **Preferred DNS:** Provide preferred DNS pool.
2. **Alternate DNS:** Provide alternate DNS pool.

Click **Save** button.

IP Settings

You can view all the details of products/services by navigating to the following path and clicking on the subscription name you wish to check details of.

> **Navigation: Home » Customer Manager » Subscription List**

Once you click the Hyper-V subscription you will be on following navigation path:

> **Navigation: Home » Customer Manager » Subscription List » Subscription Detail**
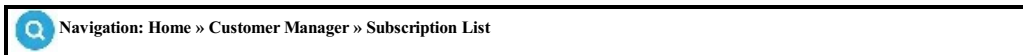
You will be able to view details of the subscription you have clicked and will be able to perform various operations on subscription. You will see following details on the Subscription Detail page.

DNS Pool:

You can select the DNS pool. Click **Save** when done.

Select **IP Settings** tab:

It shows the following listing:

1. **IP Address:** It shows the IP address.
2. **Status:** It shows the status.
3. **Options:** You can remove an IP address from options.

To add new IP click on **Add IP Address** button.

Select IP from the list under **Add new IP** section.

Click on **Save** button when done.

Viewing VPS Server Group Members

To view/manage VPS server group members navigate to the following path:

To view server group members click on **Server Group** name. To add a new server to the group click on **Add Server to Group** button. The server group members displays the following listings:

1. **Status:** It show the status of the Servers.
2. **Server Name:** Friendly name.
3. **Options:** Following are the options:
    i. **Virtual Network:** Click to Virtual Network link in order to view virtual networks.
    ii. **Test Service:** To test the VPS servers click on Test Service link.
    iii. **Disable:** You can disable your VPS Servers
    iv. **Edit:** Click on this link to edit server properties.
    v. **Remove:** Click to remove server. You cannot remove a server if there are active servers with active subscriptions.

VPS Server Group Members Management

To add VPS server group members navigate to the following path:
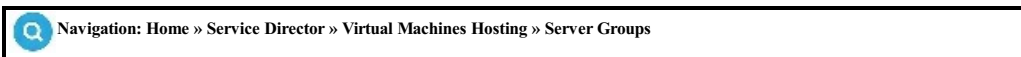
Click on **Add Group Member** link from options in front of an existing server group or add a new server by clicking on **Add Server Group** button.

In **Step-2** complete the form by:

In the *VPS Server* section fill in the following fields:

1. **Enabled:** It shows that the Server is enabled.
2. **Reference Id:** Entering Reference ID for VPS server.
3. **IP:** Entering IP of VPS server.
4. **No. of VM's allowed on this server**: Provide no of Virtual machines allowed on this server
5. **RAM that can be allocated to VMs:** Provide RAM in GB
6. **Virtual Processors:** Provide number of virtual processors.

In the *Server Credentials* section fill in the following fields:

1. **Username:** Provide Username.
2. **Password:** Provide password.
3. **Confirm password:** Retype password.

In case of standalone you can add VHD locations for each server.

1. **VHD Path:** Provide VHD path.
2. **Max Size (GBs):** Provide size in GB's
3. **Customer:** Select customers

Click **Add** when done.

Click on **Finish** button to add the server.

Virtual Networks

To view/manage Virtual Networks navigate to the following path:
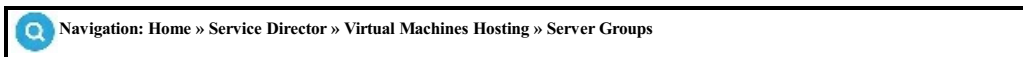
Now click on the name of the existing VPS server group name and then select **Virtual Networks** from options in front of the VPS server. To add a new virtual switch click on **Add Virtual Switch** button.

Virtual Network tab displays the following listings:

1. **Status:** It shows the status of virtual switch.
2. **Virtual Switch:** It displays the virtual switch.
3. **Hide From panel:** When this option is checked the virtual switch is not shown.

Adding Virtual Switch

To add a Virtual Switch to Virtual Machines navigate to the following path:

Navigation: Home » Service Director » Virtual Machines Hosting » Server Groups
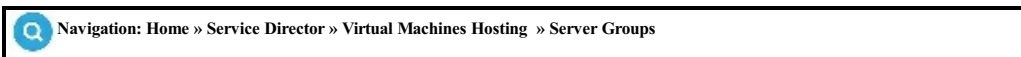
Now click on the name of the existing Hyper-V server group name and then select **Virtual Networks** from options in front of the Hyper-V server. To add a new virtual switch click on **Add Virtual Switch** button.

It shows the following fields under **Add Virtual Switch** section:

1. **Name:** Provide name of the virtual switch.
2. **Network Adapter:** Select the network adapter from the dropdown list.
3. **Allow management Operating System to share this network adapter:** Check or uncheck it.
4. **Enable virtual LAN identification for management operating system:** Check or uncheck it.
5. **VLAN ID:** Provide VLAN ID.

Click on **Save** button when done.

Add Virtual Machine

A virtual machine (VM) is a software program or operating system that not only exhibits the behavior of a separate computer, but is also capable of performing tasks such as running applications and programs like a separate computer.

To add a virtual machine navigate to following path:

Navigation: Home » Customer Manager » Customers

Now click on the Customer Name, Select **Subscriptions** tab and click on the Hyper-V subscription.

Navigation: Home » Customer Manager » Subscription List

Once you click theHyper-V subscription you will be on following navigation path:

Navigation: Home » Customer Manager » Subscription List » Subscription Detail
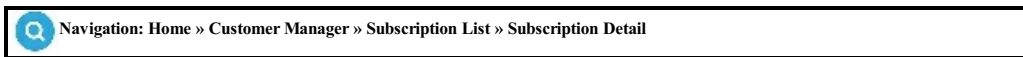
You will be able to view details of the subscription you have clicked and will be able to perform various operations on subscription. You will see following details on the Subscription Detail page.

Select **Virtual Machines** tab:

To add a new Virtual Machine click on **Add Virtual Machines** button and fill in the following fields:

1. **Virtual Machine Name:** Provide the name of the virtual machine name.
2. **CPU Cores:** Provide no of CPU cores.
3. **RAM (MB):** Provide RAM in MB.
4. **Disk Space (GB):** Provide disk space in GB.
5. **Snapshots:** Provide the no of Snapshots.
6. **No. of External IP Addresses:** Provide the no of external IP addresses.
7. **Select IP:** Select IP's from the list.
8. **Sealed Images:** Select sealed image from the drop down list.

Click on **Add** button when done.

Once the Virtual Machine is processed, you can Manage Virtual Machines.

Virtual Machines

To view & manage Virtual Machines navigate to the following path:
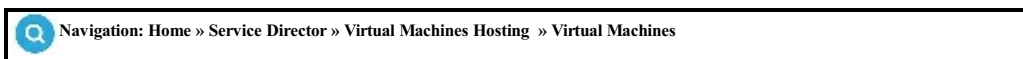
It displays the following listing:

1. **Status:** It show the status of the Virtual Machines.
2. **Subsc.ID:** It displays the subscription number.
3. **Virtual Machine Name:** It displays the name of the virtual machine.
4. **Customer ID:** It shows the customer ID.
5. **Customer Name:** It displays the name of the customer.
6. **Company name:** It displays the name of the company.
7. **Options:** Click on **Manage** from option to manage services for Virtual Machines. You can also **Add VPS**.

Virtual Machines Service Management

Orchestration Module for Microsoft Hyper-V activates rich web based interface for the management of hosted VPS service. Using the web interface the provider and the end-user may perform routine management task.

To view Virtual Machines navigate to the following path:

Navigation: Home » Service Director » Virtual Machines Hosting » Virtual Machines

Click on **Manage**. Here you can see the following tabs:

1. **Dashboard:** Under **Dashboard** tab, you can view the general settings of the VPS (Hyper-v) account such as subscription ID, account info etc. Also you can view the usage such as virtual machine, CPU, memory, disk usage in graphs.
2. **Management:** Select **Management** tab for the machine operations and network management.

Virtual Machine Management

To manage virtual machines and networks navigate to the following path:

Click on **Manage**. Select **Management** tab:

You can perform the following three *Machine Operations*:

1. **Turn Off:** Clicking on this button it will turn off the machine.
2. **Shut Down:** You can shut down the VM.
3. **Hard Reset:** Clicking on the button will reset the all the machine operations.
4. **Suspend:** Clicking on this button will suspend the VPS machine.
5. **Web Console:** you can go to Web console if configured in Servers.
6. **Change Password:** You can change password of a VM.
7. **Sync VM:** You can move to any hyper -V node (Available for Standalone)
8. **Quick Migration:** This option is available for Clustered VPS. Select Best Available Node

You can see the virtual machine settings under **General** section:

You can also add IP address and DNS address by clicking on the **Add IP Address** and **Add DNS Address** buttons respectively.

1. **Virtual Machine Name:** It displays the virtual machine name.
2. **VM Id:** It shows virtual machine Id
3. **VM NetBIOS Name:** It shows virtual machine NetBIOS name.
4. **Memory (RAM):** It displays the size of the memory in MB. You can also change your memory by clicking on **Change** button.
5. **Virtual Processors:** It shows the number of virtual processors.
6. **Snapshot Limit:** It shows the snapshot limits per machine. You can change the snapshot limits by clicking on the **Change** button.
7. **Operating System:** It shows the operating system version.
8. **License Key:** You can select and apply key.
9. **Boot From CDROM:**It shows the CDROM to boot from.

Connect:

Console | RDP
To connect to your virtual machine via RDP, select an IP address and download the RDP file.

1. **IP Address:** Select IP address.
2. **RDP Port:** Select port number.

You can also download RDP File.

Statistics:

You can Refresh a machine by clicking **Refresh Now**.

1. **Machine State:** It shows the state of the machine whether On or Off.
2. **Status:** It shows the Status of machine.
3. **CPU Usage:** It shows CPU usage.
4. **UpTime:** It shows up-time
5. **Heart beat:** It shows heart beat of machine.

Disks:

You can also add new disk by clicking on **Add Disk** button.

i. **Remove:** To remove existing disk.
ii. **Expand:** To expand the disk space.

iii. **Move To:** You can Move Disk.

Networks:

You can also manage virtual networks under *Network Management* section:

1. **Address:** It displays the IP address. To remove an IP select address from the list and click on **Remove IP Address** button.
2. **DNS Address:** It shows the DNS address. To remove the DNS address select it from the list and click on **Remove DNS Address** button.
3. **VLAN ID:** It shows the VLAN ID for e.g.10. You can also change your VLAN ID by clicking on **Change** button.
4. **Gateway:** It shows the gateway address.
5. **Subnet Mask:** It shows the subnet mask.
6. **NIC Disable due to band width over use:** It shows disabled NIC due to bandwidth overuse YES or NO.
7. **MAC Address:** It shows MAC addresses.

You can also **Add Public and Private IP's** under Network Management section.

i. To manage existing NIC click **Manage**.
ii. To remove IP addresses click **Delete.**

Boot Order:

You can Add Boot Order, Move boot order up & down. Click **Save** when done.

ISO Image:

You can attach ISO image to machine.

Snapshots

To manage snapshots navigate to the following path:

Click on **Manage**. Select **Snapshots** tab. You can perform the following four operations on snapshots:

1. Refresh List
2. Take Snapshot
3. Delete Snapshot
4. Apply Snapshot

Bandwidth Detail

To view bandwidth details navigate to the following path:

Click on **Manage**. Select **Bandwidth Detail** tab. Bandwidth Details tab shows bandwidth allowed per month for a Virtual Machine, total bandwidth used in a selected date range.

VPS Hosting Plan Management

Orchestration Module for Microsoft Hyper-V allows you to add hosting products for your customers. It includes following:

1. [Reseller Product Listing](#)
2. [Customer Product Listing](#)
3. Add-ons Management

To view/manage Hyper-V products navigate to the following path:

> 🔍 **Navigation: Home » Service Plans » Virtual Machines Hosting**

Note: You can also edit existing Hyper-V products plans by clicking on the **Edit** .

Click on **Add New Product** button. When the page loads, you will see the following settings.

1. **Product Type: Virtual Machines Hosting** from the drop-down list is selected.
2. **Product Name:** Enter the name of your product.
3. **Provider:** Select Hyper-V as a provider.
4. **Server Group:** Select the desired server group from the drop down list.
5. **Single VM:** Select If you want to enable it for single VM.
6. **Metered Billing:** Select if you want to enable Metered billing for resellers and customers.
7. **TS Gateway FQDN:** Provide TS gateway FQDN.
8. **Product Comments:** Enter any comments you to associate with this product. These comments show up on the store-front when this product is selected.
9. **Is Active:** Select No if you want to disable this product selling.
10. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
11. **Associate Addon:** You may want to associate add-on with this product. Your choices are:
    a. Optional
    b. Required
    c. Suppressed
12. **Date:** This is date set by the system (not editable).
13. **Sync sold plan resources:** Check this option in order to Sync resources to sold existing subscriptions associated with the package. **Note:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings. Skype4B plan or addon is not updated if it is assigned to user already.
14. **Enabled For Commission Reseller(s):** If you check this option the Customer Product Plan will be enabled for Commission type Resellers. (Visible only if Commission Type Reseller option is enabled in Built-in Module.)
    i. All Resellers
    ii. Select Resellers

Once you click the **Next** button you will be presented with series of forms to configure your product.

1. **Maximum VPS:** Enter the maximum number of VPS.
2. **Virtual Processors:** Provide no of total number of virtual processors allowed.
3. **RAM Per VPS (MB):** Provide RAM size per VPS in MB.
4. **Memory Type:** You can select Memory type Static RAM, Dynamic RAM or both.
5. **Memory Weight:** Provide memory weight for each VM.
6. **Bandwidth Allowed Per Month(GB):** Provide bandwidth allowed per month in GB.
7. **Disk Space per VPS (GB):** Provide disk space per VPS (GB).
8. **VHD Type:** Select VHD type: Fixed, Dynamic, Both.
9. **Auto Create Additional disks:** If this is checked Provide
    i. Disk Name
    ii. Storage Type
    iii. Size (GB)
10. **Snapshots:** Provide no of maximum snapshots per VPS.
11. **No. of Public IP Addresses:** Provide the no of Public IP addresses per VPS.
12. **No. of Private IP Addresses:** Provide the no of Private IP addresses per VPS.

13. **Public NIC Bandwidth Tiers:** Select public bandwidth tiers.
14. **Private NIC Bandwidth Tiers:** Select private bandwidth tiers.
15. **Available disk images:** Check if the disk image is available.

Payment Cycles: This form lets you select Payment Cycles for the plan. You must select at least one payment cycle and payment group.

Select the payment cycle and click right arrow button to move it to **_Selected Cycles_** list.

Select the payment group and click right arrow button to move it to **_Selected Payment Groups_** list.

Payment Groups: This form lets you set prices for the Payment Cycles and Payment Groups you have selected in the previous step. Here you may set:

   a. Setup Price
   b. Price
   c. Discount

Enter prices in each box.

Possible Product Upgrade / Downgrade: Here you may configure the upgrade and downgrade behavior of this product. When a product is purchased, your client may perform upgrade/downgrade from their control center without your involvement.

Associate Addon: This form lets you associate addon with your hosting plan. Your client may buy these addon using online store or order them through their customer control center.

Click on **Finish** button to complete product setup.

Usage Report for VPS

To view Usage report navigate to the usage report.

To filter record fill in the following field:

1. **Owner:** Search by the name of the owner.
2. **Customer Name:** It is the customer name.
3. **Company Name:** It is the company name.
4. **Server Node:** Search by server node.
5. **VM Name:** Search by VM name.

Then click on **filter** Button. You can view and **Export to Excel** following from VPS Usage Report. It displays the following listing:

1. **Company Name:** It shows the company name.
2. **Customer Name:** It shows the customer name.
3. **Customer number:** It shows customer number.
4. **Package Name:** It shows the package name the vps account is using.
5. **Owner:** It shows the name of owner.
6. **VM Name:** It shows the name of VM.
7. **CPU Cores:** It shows total number of CPU cores.
8. **RAM (MB):** It shows the RAM.
9. **Operating System:** It shows the operating system.
10. **No Of Disks:** It shows the number of disks
11. **Total Disks Space:** It shows total disk space.
12. **Total Public NICs:** It shows total public NICs.
13. **Total Private NICs:** It shows total private NICs.
14. **Total Public IPs:** It shows total public IPs.
15. **Total Private IPs:** It shows total number of private IPs.
16. **Date Created:** It shows the date when it is created.

Group Actions for VPS

To view Group actions navigate to the usage report.

To filter record fill in the following field:

1. **Owner:** search by the name of the owner.
2. **Customer Name:** It is the customer name.
3. **Company Name:** It is the company name.
4. **Command:** Search by command.
5. **Status:** Search by status for e.g. enable/disabled.

Click **Reset Tries Count** to automate provisioning process once the tries count reached '10'. You can also **Clear Completed/Cancelled Jobs**. It displays the following listings:

1. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.
2. **Command:** It is the command on which group action is to be performed.
3. **Date:** It displays the date.
4. **Entered Tries:** It shows the number of entered tries.
5. **Last Tried:** It displays the last try.
6. **Customer ID:** It is the customer id.
7. **Customer Name:** It is the customer name.
8. **Owner:** It is the owner of the exchange.
9. **Added by:** It displays the name of the employee.
10. **Option:** You can manually click on RUN link for failed items.

Adding Sealed Images

To view/manage sealed images navigate to the following path:

To add a new image click on **Add Sealed Image** button.

1. **Image Name:** Provide image title.
2. **Image path:** Provide the path of the image.
3. **VM Generation:** Select Generation 2 or Generation 1
4. **Sealed Image Type:** Select the type of the sealed image Windows\ Linux.
5. **Operating System:** Select operating system from the dropdown.
6. **Apply Windows Product Key:** Check box to apply key.
7. **Delay for OS initialization after 1st boot:** Provide delay.

Click on **Save** button when done.

Quota Settings (Hyper-V)

To view/manage quota settings navigate to the following path:

To configure quota select **Quota Settings** tab:

1. **Enable Bandwidth Metering:** Check this option to enable.
2. **Send email to:** Select option for e.g. Owner Only, Customer Only, Both Owner and Customer. When bandwidth usage is -----% of allowed limit.
3. **Automatic Suspend Service:** Select days. When bandwidth is over used.
4. **Automatic Resume:** Check this option for automatic resume.

Click on **Save** button when done.

OS Licenses

To view and manage OS Licenses navigate to the following path:

Select **OS Licenses** tab.

1. **License Key:** Provide License Key.
2. **Operating System:** Select Operating system
3. **Max Activations:** Provide maximum number of activations.
4. **Active:** Select Active

Click **Save** when done.

Adding ISO image

To view and manage OS Licenses navigate to the following path:

Select **ISO Image** tab. Click **Add ISO Image** button.

1. **Image Name:** Provide ISO image name.
2. **ISO Image File Path:** Provide ISO image path.
3. **Enabled:** Check this box to enable.
4. **Select Customer(s):** Select Customers to apply this ISO image.

Click **Save** when done

Adding Storage Types

To view and manage OS Licenses navigate to the following path:

Select **Storage Type** tab. Click **Add Storage Type** button.

- **Storage Type Name:** Provide storage type name.

Click **Save** when done.

VNIC Bandwidth Tiers

To view and manage VNIC bandwidth tiers navigate to the following path:

Select **VNIC Bandwidth Tiers** tab. Click **Add Bandwidth Tier** button.

1. **Tier Name:** Provide bandwidth tier name.
2. **Min Mbps:** Provide min mbps for tier.
3. **Max Mbps:** Provide max mbps for tier.
4. **Applied To:** Select Public or Private tier.

Click **Save** when done.

RDP Custom Ports

To view and manage rdp custom ports navigate to the following path:

Select **RDP Custom Ports** tab.

To add custom port click **Add RDP Custom Ports Range**

1. **Ports Range:** Provide range for rdp custom ports.
2. **Enabled:** Check box
3. **Select Customer(s):** Select Customers.

Click Save when done.

Orchestration Module for Microsoft CSP

Control Panel allows Microsoft CSP/Office365 Service through its Orchestration Module for Microsoft CSP. Orchestration Module for Microsoft CSP fully automate and manage entire lifecycle of your Direct and Indirect CSP Business with Control Panel.

It provides Showcase, Bundle and Sell Integrated offers and services through white labelled customized storefront with complete control over subscription and plans.

It accelerate your success with complete business automation of Microsoft O365 & Azure. Provision, Manage, support & Bill Microsoft CSP.

Control Panel automate all aspects of your financial operations with ability to Direct billing to customers with unified & consolidated invoices to simplify the billing process for Microsoft Office365, Azure CSP Billing.

Note: Please make sure you have subscribed to Orchestration Module for Microsoft CSP to avail this service otherwise you won't be able to utilize this feature. If you have any questions or want to avail this feature, please contact your service provider.

Microsoft CSP Profiles

In order to provision and manage CSP tenant you need to add CSP profiles depending upon locale, region etc. Control Panel integrate CSP profile using *Secure Application Model framework*.

You will see following tabs:

1. You can add new CSP profiles by clicking Add CSP Profile button. The Microsoft CSP Profiles will display following listing:
    i. **Profile Name:** It shows the name of CSP Profile.
    ii. **Region:** It shows the region of the CSP Profile.
    iii. **Web App Domain:** It shows the name of Web application domain.
    iv. **User Name:** It shows the user name.
    v. **Options:** It display options to **Edit**, Commercial Saas Products, **Test** and **Remove** a profile.
2. You can Add New Offers Price listing under **Offers Price Listing** tab.
3. You can add Commercial Saas Products Price listing under **Commercial Saas Prod Price** tab.
4. You can Add Power BI View under **Power BI View** tab.
5. You can Import/Export CSP offers under **Offer Name and Description** tab.

Secure Application Model

References:

INSTALLING PRE-REQUISITES AND POWERSHELL MODULES

For Control Panel to interact with Microsoft CSP / Office 365, there are multiple PowerShell modules required to be installed on control server. Apart from PowerShell modules installation, there are other configuration steps involved and host machine environment requirements to complete and these are as follows.

1. **Dot Net Framework 4.5:** Microsoft Dot Net Framework 4.5 or above shall be installed on host machine (In most cases it will be already installed on control server)
2. **Set Execution Policy:** Execution policy for Windows PowerShell needs to be set to 'RemoteSigned' so that remote commands can be executed in shell. To set execution policy, please open windows PowerShell and type below command and then press enter to execute:

Set-ExecutionPolicy RemoteSigned

Powershell Modules and their Configuration/Installation

1. Ensure there is no "Microsoft Azure Active Directory Module for Windows PowerShell" v1.1.166.0 or older, Uninstall this if it is installed.
2. Install PowerShell 5.1 if not installed. To check your PowerShell version use command:
   $PSVersionTable.PSVersion
3. It should be like below or a latest build

```
2.
3.  PS C:\WINDOWS\system32> $PSVersionTable.PSVersion
4.
5.  Major   Minor   Build   Revision
6.  -----   -----   -----   --------
7.  5       1       17134   858
8.
```

To install: https://www.microsoft.com/en-us/download/details.aspx?id=54616

Install **Module MSOnline** using command: Open PowerShell as Administrator

1. Run Command Get-PackageProvider
   a. See: NuGet, version should be: 2.8.5.208 or latest.
      I. If version is older then 2.8.5.208 run commands:
         i. [System.Net.ServicePointManager]::SecurityProtocol =[System.Net.SecurityProtocolType]::Tls12;
         ii. Install-PackageProvider -Name NuGet -RequiredVersion 2.8.5.208 -Force
      II. Once done, Close PowerShell and Re-open as Administator.
2. Run commands:
   a. [System.Net.ServicePointManager]::SecurityProtocol = [System.Net.SecurityProtocolType]::Tls12;
   b. Install-Module -Name MSOnline
   c. Install-Module -Name PartnerCenter
   d. Import-Module MSOnline
   e. Get-Module
      I. MsOnline version should be >= 1.1.183.17

On Control Server use the file **SharePointOnlineManagementShell_7414-1200_x64_en-us** to install SharePoint Online Module for Office 365.

Execute commands below to get your - ***Refresh Token**: - to be inserted into Control Panel CSP Profile settings.

```
$webAppId = '00000000-0000-0000-0000-000000000000'

$webAppSecret = 'fjrnf34ffn43oif34iofj3ifjfoi34foi34fj' | ConvertTo-SecureString -AsPlainText -Force

$tenantId = '00000000-0000-0000-0000-000000000000'
```

```
$credential = New-Object -TypeName System.Management.Automation.PSCredential -ArgumentList
$webAppId,$webAppSecret

$token = New-PartnerAccessToken -Consent -Credential $credential -Resource
https://api.partnercenter.microsoft.com -TenantId

$tenantId -ApplicationId $webAppId
```

Enter CSP Service Account **Username**/**Password and MFA Key** when prompted **during command execution** to generate token.

To get token value write $token.refreshtoken and hit **Enter**. Copy value of **Refresh token.**

```
$credential = New-Object -TypeName System.Management.Automation.PSCredential -ArgumentList
$webAppId,$webAppSecret


$token = New-PartnerAccessToken -Consent -Credential $credential -Resource
https://api.partnercenter.microsoft.com -TenantId


$tenantId -ApplicationId $webAppId
```

Add CSP Profile

Automation Module for Microsoft CSP / Office 365 is the only management software that completely wipes out the complexities in Office 365 management by its unified approach. It allows you to significantly reduce your time to manage users, groups, contacts and manipulate plenty of settings via single interface. It is simple, fast and consolidated admin center that allows you to perform numerous action at a time without waiting for any previous one to be completed.

To achieve this, you need to integrate CSP profile using [Secure Application Model.](#)

To add a new CSP Profile navigate to the path mentioned below:

> 🔍 **Navigation: Home » Service Director » Microsoft CSP » Microsoft CSP Profiles**

You can Add your CSP profiles depending upon Locale and region etc. by clicking **Add CSP Profile** button.

1. **Profile Name:** Provide user friendly Profile name.
2. **Sell to location:** Select location from the drop down list.
3. **Azure Environment:** Select from drop down list.
4. **Locale:** Select Locale for your profile.

For below settings refer to https://partnercenter.microsoft.com/en-us/pcv/apiintegration/appmanagement:

1. **Tenant ID:** Get from Azure Application [**Directory(tenant) ID**]
2. **Web AppId:** Get from https://partnercenter.microsoft.com and get **Web>>App ID** to speify here.
3. **Web App Secret:** Get from Azure Application (the **Client Secret** that you generated.
4. **Web App Domain:** Get from Microsoft Partner Center (**App Management>>Domain**)
5. **Native App Id:** Get from https://partnercenter.microsoft.com and get **Native App**>>App ID to speify here.
6. **Refresh Token:** Provide refresh token here.

Click **Save** when done.

Add Offers Price Listing

To add a new CSP Offers Price navigate to the path mentioned below:

Select **CSP Offers Price** tab.

You can Add Offers Price Listing depending upon Locale and region etc. by clicking **Add Offers Price Listing** button.

1. **Select CSP Profile:** Select CSP profile
2. **Select Microsoft Price Sheet:** Click "Select File" and browse
3. **Billing Cycle:** Provide billing cycle.
4. **Profit To Add:** Provide profit percentage.
5. **Update pricing for existing packages:** Select this option for existing packages.
6. **Select Package:** Select existing CSP products.

Click **Save** when done.

Commercial Saas Products Price

Control Panel fully automate Microsoft's New Commerce Experience (NCE) for CSP. To add product Price for commercial Saas products navigate to the path mentioned below:
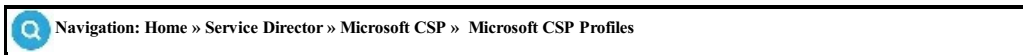
Under **Microsoft CSP Profiles** select **Commercial Saas Prod Price tab** to see the Products Price lists:

1. **Date stamp:** It shows the date and time to add price listing.
2. **Profile Name:** It shows the profile name.
3. **Profit to add:** It shows profit percentage.
4. **Update Existing Packages:** It will shows if existing packages are updated or not.
5. **Payment Group:** It shows currency.
6. **Options:** It shows details for the price listing.

Add Products Price Listing

To add new Prices click **Add Products Price Listing** and provide following information.

1. **Select CSP profile:** Select profile.
2. **Payment Group:** Select payment group.
3. **Country:** Select country.
4. **Language/Locale:** Select language/locale.
5. **Profit to add:** Provide profit in percentage.
6. **Update pricing for existing packages:** Check box
7. **Select Microsoft price sheet:** Click **Select file** and select Microsoft price listing sheet.
8. **Send email:** An email will be sent to all customers.

Click **Save** when done.

Add Power BI View

Power BI is a business analytics service by Microsoft. It aims to provide interactive visualizations and business intelligence capabilities with an interface simple enough for end users to create their own reports and dashboards.

To add a new Power BI view navigate to the path mentioned below:

Select **Power BI View** tab.

You can Power BI view by clicking **Add Power BI View.**

1. **Select CSP Profile:** Select CSP profile
2. **View Name:** Provide view name.
3. **View Link:** Provide power BI link.

Click **Save** when done.

Import/Export Commercial Saas Products

Control Panel fully automate Microsoft's New Commerce Experience (NCE) for CSP. To import/export commercial Saas products navigate to the path mentioned below:
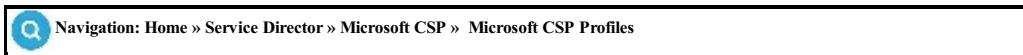
Under **Microsoft CSP Profiles** place cursor in **Options** column of your existing CSP profile. Click **Commercial Saas Products** to see the Products lists:

Import Products

Click on **Import Products** you can import **Commercial Saas Products** using an Excel file.

Export Products

Click on **Export Products** to export **Commercial Saas Products** on an Excel file.

You can also **Sync from backend** and **Get Products** for New Commerce Experience (NCE).

CSP Commercial Saas Products will show following details in column:

1. Product
2. Billing cycle
3. Cost Price
4. Sale Price

Offer Name & Description

To import and export offers navigate to the path:

Select **Offer Name and Description** tab. You can Import and Export offers here by clicking **Import** and **Export**.

You need to select file in order to import desired offers.

Select **Offer Name and Description** tab. You can Import and Export offers here by clicking **Import** and **Export**.

You need to select file in order to import desired offers.

Viewing Sync CSP Products Jobs

In order to view CSP Products jobs navigate to following path:

Click **Clear Completed Jobs** to clear jobs from the listing.

You will see following in the listing:

1. **Profile Name:** It shows profile name
2. **Country:** It shows country/region.
3. **Culture:** It shows culture
4. **Currency:** It shows currency.
5. **Status:** It shows status of job like CompletedWithSuccess/Errors
6. **Job details:** It shows the job details.
7. **Option:** It shows option to manually RUN the job.

CSP Distributors

Tech Data is one of the world's largest technology distributors. Indirect CSP will allow you to partner up with a CSP Provider who can help offer that support to customers.

To add a new CSP distributor navigate to the path mentioned below:

🔍 **Navigation: Home » Service Director » Microsoft CSP » CSP Distributor**

You can choose **TechData** as CSP distributor (Indirect Partner) by clicking **Add CSP Distributor** button.

1. **Distribution Provider:** Select TechData
2. **Name:** Provide friendly name of CSP distributor.
3. **Description:** Provide description
4. **Authentication End Point:** Provide authentication end point.
5. **API End Point:** Provide API end point.
6. **Client Id:** Provide client ID
7. **Client Secret:** Provide secret key
8. **Reseller Signature Key:** Provide reseller signature key.
9. **Reseller ID:** Provide reseller ID
10. **Status:** Select status Enable or Disabled.

Click **Save** when done.

Microsoft CSP Tenants

To manage CSP Accounts, navigate to the following path as shown below:

You can *search* your CSP Tenants by Owner, Tenant Name, Subsc.ID, Domain, Subsc Status, Customer ID, Customer Name, Company Name.

You can **Send CSP Invitation** for tenants and **Export Subscription reconciliation Report.**

The CSP Tenants will display following listing:

1. **Status:** It shows the status of the CSP tenant.
2. **Subsc.ID:** It shows the subscription ID of the CSP account.
3. **Tenant Name:** It shows the tenant name.
4. **Domain:** It shows the Domain of the tenant.
5. **Package Name :** It shows the package to which the tenant is subscribed.
6. **Customer:** It shows its customer name.
7. **Company Name:** It shows the name of company.
8. **Owner:** It shows the name of owner i.e. Host
9. **Options:** It displays the options to Manage and Edit account.

Send CSP Invitation

To send CSP invitation to customer navigate to the path mentioned below:

Click **Send CSP Invitation** to customers by email:

From: Select owner/customer from dropdown list.

1. **Select Language:** Select Language.
2. **Select CSP Profile:** Select CSP profile
3. **Invitation Link:** Provide Invitation link
4. **To Address:** Provide to address
5. **CC:** Provide CC address.
6. **Subject:** Enter Subject of email
7. **Body:** Customize body of email.

Click **Save** when done

Click **Send CSP Invitation** to customers by email:

CSP Tenants Service Management

To manage CSP tenants/Accounts navigate to the following path:

Click **Manage** in front of CSP tenant. You will land on "Tenant Detail" page:

You will see following tabs for CSP tenant Management:

1. General Settings: You will see detail of Edit, **Subscription ID**.To manage subscriptions click on "subscription ID" and select **Susbcriptions** tab. See **Note** below, Tenant admin details and License information.
2. Account Information : You can view customer bill to information as well as Microsoft agreement.
3. Domains: Here you can add new domains.
4. Users: You can view, add and manage Users.
5. Shared Mailboxes: You can view, add and manage shared users.
6. Resource Mailboxes: You can view, add and manage Resource mailboxes.
7. Mail Contacts: You can view, add and manage contacts.
8. Groups: You can view, add, manage and perform group actions on distribution groups.
9. SharePoint: You can view, add and manage SharePoint sites. Once the SharePoint site has been added you can view, add, manage Users, Permission level, Groups and perform groups actions.
10. Direct Routing: You can configure direct routing & assign numbers to users/resources.
11. Polices: You can configure password policies for CSP user.
12. Group Actions: You can view all group action performed.
13. Teams: Under teams tab you can manage Teams and Channels.

Note: Clicking on **Subscription ID**, you will be on following navigation path:
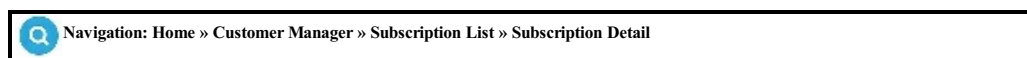
Select **Subscriptions** tab. You can **Add Subscription** and **Import Subscription** from Microsoft CSP for existing tenant.

To view more details on CSP subscription management Click Here.

General Settings/Edit Tenant Details

To Edit tenant details, navigate to following path:

Click **Manage** in front of CSP Tenant. Select **General Settings** tab.

You can perform following operation on a CSP Tenant under **general settings** tab:

1. **Edit:** You cannot edit owner, customer and tenant name.
     i. **Select Owner:** It shows Owner name.
    ii. **Select Customer:** It shows customer name.
   iii. **Tenant Name:** It shows Tenant name
    iv. **Administrator login:** It shows Administrator login.
     v. **Password:** Leave blank if you do not want to change.
    vi. **Country:** It shows the dropdown list to select country.
   vii. **Select Locale:** Select locale.
2. Sync All with Microsoft CSP.
3. Sync Domains, Licenses, Policies and roles.

General

1. **Subscription ID:** It shows the subscription ID and name by click you will go to subscription details.
2. **Customer:** It shows customer Id and name by click on it you will go to customer detail.
3. **Owner:** It shows owner.
4. **Tenant Name:** It shows the tenant name.
5. **Admin email:** It shows Admin email.
6. **Admin password:** It shows password when you click show password.
7. **Manage tenant using panel:** Select disable to disable management of tenant using control panel.
8. **Azure AD Sync enabled:** It shows if Azure AD Sync enabled
9. **Exchange Hybrid Mode enabled:** It shows if Hybrid Mode is enabled.

License Information:

It shows following columns which shows units along with name.

1. Name
2. Active Units
3. Consumed Units
4. Locked-Out Units
5. Suspended Units
6. Warning Units

Manage CSP Tenant using panel

To manage CSP Accounts navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant.

Manage tenant using panel: Select Enable to enable management of tenant using control panel. Provide Global Admin user details:

1. **Admin email:** It shows Admin email.
2. **Admin password:** It shows password when you click show password.

Manage Hybrid Organization

A hybrid cloud is a type of cloud computing that combines a private cloud (on-premises infrastructure), with a public cloud like Azure Active Directory. You can manage a hybrid organization in which Users have access to both on-premises and cloud applications. Also you can Sync new users, contacts, and groups created in on-premises/hosted Active Directory to the cloud automatically.

Hybrid Cloud Management for On-Premise Microsoft Exchange and Microsoft 365:

STEP-1: Create a CSP plan and select option "Linked with local organization" under **Resources** tab:

1. **Linked with local organization:** Check this option if you want to link organization i.e. Hybrid Organizations.

STEP-2: Create Organizations for CSP and Exchange using **Existing** organization. For e.g "Hybrid Org"

1. **Subscribe to Microsoft 365/CSP:** Subscribe to Microsoft Office 365 service and create an organization for e.g "Hybrid Org" using Microsoft CSP Service plan.
2. **Subscribe to Microsoft Exchange Hosted:** Subscribe to Microsoft Exchange Service by selecting the existing Organization "Hybrid Org" from the drop down.

In order to manage the hybrid organization navigate to the path:

> 🔍 **Navigation: Home » Service Director » Active Directory » Active Directory Organizations**

You can see both **Microsoft Exchange** and **Office 365** under "Subscriptions" for Hybrid Organizations.

1. You can **Add/Edit** users and enable required services like Exchange, O365.
2. Click **Add User** to add new user in case you are creating & managing users from web interface.
3. To enable Microsoft 365 service on this user, expand **Enable Microsoft 365** service section and check option **Add Microsoft 365** and provide other details.
4. Similarly, Enable Exchange service check **Add mailbox** option and provide other details and click **Save** when done. Group jobs will be added and processed in backend.
5. Once jobs are processed a hybrid user is added with services on hosted AD and O365.
6. The user is now successfully added for both services and you can **Edit**, **Change Passwords** and perform other actions from options column.
7. Changing password will update user on both places i.e. on Hosted AD and Office 365
8. Similarly, you can change **Group Membership** of user.
9. Separate tabs will be shown for already enabled services i.e. Microsoft 365 Account & Mailbox Account.

Viewing CSP Subscriptions

In CSP each subscription have unique set of offer(s)/addon(s). You can increase/decrease license count as well add new add-ons (sub-offers) by clicking on subscription.

To view CSP subscriptions details, navigate to following path:

> 🔍 **Navigation: Home » Service Director » Microsoft CSP » Accounts**

Click **Manage** in front of CSP Tenant. Select **General Settings** tab.

Click on the **Subscription ID**, you will be on following navigation path:

> 🔍 **Navigation: Home » Customer Manager » Subscription List » Subscription Detail**

You will be able to view details of the subscription you have clicked and will be able to perform various operations on subscription. Select **Subscriptions** tab. You have following option for subscription management:

1. Add subscription
2. Import Active/Inactive Subscription
3. Convert trial offers to Billing
4. Increase/Decrease Licenses
5. Activate/suspend subscription
6. Upgrade subscription

Add CSP Subscription

To add & manage CSP subscriptions navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Under **General** tab you will see **subscription ID and name** by clicking on it you will go to subscription details.

Select **Subscriptions** tab, Click **Add Subscription** to add a new subscription.

Increase/Decrease License

To increase/decrease License quantity of a CSP subscription navigate to the following path as shown below:

Click on **Manage** link in front of a CSP Tenant. Under **General** tab you will see **subscription ID and name** by clicking on it you will go to subscription details.

Select **Subscriptions** tab, Increase or decrease the **License quantity** for a particular subscription.

Click **Update** when done.

Activate/Suspend CSP Subscription

To activate/suspend CSP subscription navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Under **General** tab you will see subscription ID and name by clicking on it you will go to subscription details.

Select **Subscriptions** tab, change **Status** (Activate/Suspend) for a particular subscription.

Click **Update** when done.

Import CSP Subscription

To Import a CSP subscription for an existing tenant navigate to the following path as shown below:

> 🔍 **Navigation: Home » Service Director » Microsoft CSP » Accounts**

Click on **Manage** in front of a CSP Tenant. Under **General** tab you will see **subscription ID and name** by clicking on it you will go to subscription details.

Select **Subscriptions** tab, click **Import Subscription** button.

Import Trial subscription

In order to import a **Trial Subscription** (Inactive) you need to create a Trial CSP Product by choosing required Trial CSP Offers/Add-ons.

See Also [Create a CSP Product](#)

Trial offers do NOT support **quantity** update and **status (suspend/resume)** update.

Trial subscriptions will not be billed, they will be shown under **Trial Subscription.** To view navigate to the following path as shown below:

> 🔍 **Navigation: Home » Service Director » Microsoft CSP » Trial Subscriptions**

Trial offers can also be converted to paid/billed offers. Click on the name of Trial Offer, select new offer in **"Convert To"** and click **Save**.

Upgrade existing CSP Subscription

You can upgrade the existing subscriptions along with Add-ons. To upgrade an existing CSP subscription navigate to the following path as shown below:

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of a CSP Tenant. Under **General** tab you will see **subscription ID and name** by clicking on it you will go to subscription details.

Select **Subscriptions** tab, click on the name of subscription. Select new Offer / available add-ons and **Save.**

Convert Trial Offers

Trial offers (Inactive subscriptions) can also be converted to paid/billed offers. Click on the name of Trial Offer, select new offer in **"Convert To"** and click **Save**.

Account Information

To view and update CSP account information, navigate to the following path as shown below:
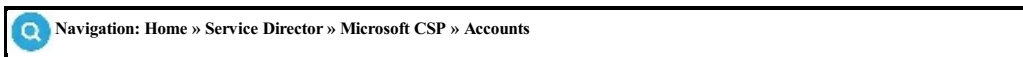
Click on **Manage** and select **Account Information** tab.

You can update following for a CSP account:

Microsoft ID: you can view the Microsoft ID of the account.

Bill-to info

1. **First Name:** Here provide the First name.
2. **Last Name:** Here provide the Last name.
3. **Company Name:** Here provide the customer name.
4. **Address:** Here provide the Address.
5. **City:** Here provide the city.
6. **Country/Region:** It shows country region.
7. **State/Province:** It shows State/ Province
8. **Zip/Postal Code:** Here provide the postal code.
9. **Phone Number:** Here provide the phone number.
10. **Email Address :** Here provide the email address.

Company Information

1. **Company:** It shows company name.
2. **Primary Contact:** It shows primary contact.

Update Microsoft Agreement

To update Microsoft agreement of a CSP account navigate to the following path as shown below:

Click on **Manage** and select **Account Information** tab. Click **Update**.

CSP Domains

To view and add CSP tenant Domains, navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Domains** tab. To add a new Domain click **Add Domain** button. Provide domain name and click **Save**.

It displays following:

1. **Domain:** It shows the name of the domain.
2. **Default:** It shows that domain is Default or not.
3. **Authentication Type:** It display the authentication type.
4. **Status:** It displays the status of domain.
5. **Options:** It displays options to Set Default and Remove.

CSP Users

To view and add users, navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Users** tab.

To add a new user click **Add User** button. You can also **Add Bulk Users**, perform **Group Operations** for Users and **Sync All with Microsoft CSP.**

It displays following:

1. **Sign-In Status:** It shows the Sign-In status of the user.
2. **Display name:** It shows the display name of User.
3. **User Principal Name:** It shows the UPName of User.
4. **Licenses:** It displays the licenses of the user
5. **Role:** It shows the role assigned to user.
6. **Status:** It displays the status of the user.
7. **Options:** It shows the options to **Edit, Remove**.

Add CSP Users

To add Users, navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Users** tab. To add a new user click **Add User** button.

General Settings

1. **First Name:** Provide First name of the user.
2. **Last Name:** Provide Last name.
3. **User Display Name:** Provide user display name.
4. **User Principal Name:** Provide UPName.
5. **Password:** Provide password.
6. **Make this person change their password the next time they sign in:** Check this option to enable it.
7. **Password never expires:** Check this option to set password never expires.
8. **Send Email:** Check this option to send email and provide email address.

Settings

1. **Assign role:** Check this option to assign role and select role.
2. **Alternate email:** Alternate email address is mandatory when assigning a role to the user. Otherwise this can be left blank
3. **Sign-In Status:** Select on of the following:
   a. Allowed
   b. Blocked

Licenses

1. **Usage Location:** Select Location.
2. **Assign Licenses:** Select Licenses.

Click **Save** when done.

Group Operations

To view Group Operations, navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Users** tab. To perform group operations click **Group Operations** tab.

You can search users by User Principal Name, Display name, Alternate email, Role, Sign-In Status, License Status. You can also use **Advanced** Search.

Users/Mailboxes: Select Users / Mailboxes

1. **General Information:** You can update following under general information Department, Office, Phone (Business), Fax, Street Address, City, State/Province, Zip/Postal Code, Country/Region.
2. **Archiving:** You can enable/disable archiving.
3. **Permissions And Licenses :** You can assign role, status and licenses etc.
4. **Mailbox General Settings:** You can change Language, time zone etc.
5. **Membership:** You can Add distribution list member ship.
6. **Litigation Hold:** You can enable/disable litigation hold.
7. **Add Email Alias:** You can set email address and domain.
8. **Unified Messaging:** You can enable/disable UM.
9. **Email Forwarding:** You can set Email forwarding.
10. **Grant Permission:** You can grant permissions such as send As, Full Access etc.
11. **Remove Permission:** You can remove permissions.
12. **Calendar Permissions:** You can assign Calendar permissions.
13. **Automatic Reply:** You can set automatic reply.
14. **Update Password:** You can update password.

Viewing Shared Mailboxes

To view and add shared mailboxes, navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Shared Mailboxes** tab. To add a new shared mailbox click **Add Mailbox** button.

It displays following listing:

1. **Display name:** It shows the display name of mailbox.
2. **Primary SMTP email:** It shows the primary SMTP email.
3. **Licenses:** It shows the licenses.
4. **Email alias name:** It shows the email alias name.
5. **Hide from Exchange Address Lists:** It shows if it is hidden from Exchange Address list.
6. **Status:** It shows the status of the mailbox.
7. **Options:** It shows the option to **Edit** and **Delete** the mailbox.

Add Shared Mailbox

To view and add shared mailboxes, navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Shared Mailboxes** tab. To add a new shared mailbox click **Add Mailbox** button.

Under **General Setting**s section provide following:

1. **User Display Name:** Provide User friendly name of shared mailbox.
2. **User Principal Name:** Provide UPName of Mailbox.

Licenses

1. **Usage Location:** Select Location.
2. **Assign Licenses:** Select Licenses.

Under **Exchange Properties** section you can provide following information.

General Settings: You can select and provide following in general settings.b

1. **Email alias name :** Provide email alias name.
2. **Address Book Policy:** Select address book policy.
3. **Hide from Exchange Address Lists:** Check if you want to hide from Exchange address list
4. **Language:** Select Language
5. **Time zone:** Select Time zone.
6. **Manager:** Select Manager.
7. **Custom Attributes:** Select Custom Attributes for the Shared Mailbox.
8. **Email Addresses:** Provide here email address.
9. **Mailbox features:** You can provide following mailbox features for shared mailboxes.

Policies

1. **Sharing Policy:** Select sharing policy.
2. **Role Assignment Policy:** Select role assignment policy.
3. **Retention policy:** Select retention policy.
4. **ActiveSync enabled:** Check to enable ActiveSync.

Email Connectivity

1. **OWA Enabled:**Check to enable OWA.
2. **IMAP Enabled:** Check to enable IMAP.
3. **POP3 Enabled:** Check to enable POP3.
4. **MAPI Enabled:** Check to enable MAPI.
5. **Mailbox Archive:** Check to enable Mailbox Archive and provide Mailbox archive name.
6. **Mail Flow Settings:** Check this option to Enable email forwarding and select from the dropdown list.

Message Size Restrictions

1. **Maximum sent message size (KB):** Provide size in KB.
2. **Maximum received message size (KB):** Provide size in KB.

Message Delivery Restrictions: Select senders as per requirement.

1. **Accept messages from:** Select one of following: a). All senders b). Only senders in the following list
2. **Require that all senders are authenticated:** Check to enable this option
3. **Reject message from:** a). No senders b). Senders in the following list

Mail Tip: Provide mailtip.

Mailbox Permissions: You can select mailboxes for Send As, and Full Access Permissions.

Member Of: Select member (s) of the shared Mailbox.

Calendar Permissions: Click **Add Permission** to add calendar permissions, Select **Member** and **Permission Level** and save.

Viewing Resource Mailboxes

To view and add resource mailboxes, navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Resource Mailboxes** tab.

To add a new resource mailbox click **Add Mailbox.**

1. Room Mailbox
2. Equipment Mailbox

It displays following listing:

1. **Display name:** It shows the display name of mailbox.
2. **Primary SMTP email:** It shows the primary SMTP email.
3. **Mailbox Type:** It shows the type of resource Mailbox.
4. **Licenses:** It shows the licenses.
5. **Email alias name:** It shows the email alias name.
6. **Hide from Exchange Address Lists:** It shows if it is hidden from Exchange Address list.
7. **Status:** It shows the status of the mailbox.
8. **Options:** It shows the option to **Edit** and **Delete** the mailbox.

Add Resource Mailbox (Room Mailbox)

To add room mailboxes navigate to the following path as shown below:

Click on **Manage** link in front of a CSP Tenant. Now select **Resource Mailboxes** tab. To add a new room mailbox click **Add Mailbox (Room Mailbox)** button.

Under **General Settings** section provide following:

1. **User Display Name:** Provide User friendly name of room mailbox.
2. **User Principal Name:** Provide UPName of Mailbox.

Under **Licenses** provide following:

1. **Usage Location:** Select Location.
2. **Assign Licenses:** Select Licenses.

Under **Exchange Properties** section you can provide following information.

1. **General Settings:** You can select and provide following in general settings.
    i. **Email alias name :** Provide email alias name.
    ii. **Resource Capacity:** Provide resource capacity.
    iii. **Hide from Exchange Address Lists:** Check if you want to hide from Exchange address list
    iv. **Language:** Select Language
    v. **Time zone:** Select Time zone.
    vi. **Manager:** Select Manager.
2. **Custom Attributes:** Select Custom Attributes for the Shared Mailbox.
3. **Email Addresses:** Provide here email address.
4. **Mailbox features:** You can provide following mailbox features for shared mailboxes.
    i. Policies
        a. **Sharing Policy:** Select sharing policy.
        b. **Role Assignment Policy:** Select role assignment policy.
        c. **Retention policy:** Select retention policy.
        d. **ActiveSync enabled:** Check to enable ActiveSync.
    ii. Email Connectivity
        a. **OWA Enabled:** Check to enable OWA.
        b. **IMAP Enabled:** Check to enable IMAP.
        c. **POP3 Enabled:**Check to enable POP3.
        d. **MAPI Enabled:** Check to enable MAPI.
    iii. **Mailbox Archive:** Check to enable Mailbox Archive and provide Mailbox archive name.
    iv. **Mail Flow Settings:** Check this option to Enable email forwarding and select from the dropdown list.
5. Message Size Restrictions
    i. **Maximum sent message size (KB):** Provide size in KB.
    ii. **Maximum received message size (KB):** Provide size in KB.
6. Message Delivery Restrictions: Select senders as per requirement.
    i. **Accept messages from**: Select one of following: a). All senders b). Only senders in the following list
    ii. **Require that all senders are authenticated:** Check to enable this option
    iii. **Reject message from:** a). No senders b). Senders in the following list
7. Booking Settings
    1. Booking Delegates
        i. **Booking requests:** Select one of the following for booking requests
            a. Accept or decline booking requests automatically
            b. Select delegates who can accept or decline booking requests
        ii. **Booking Options**
            a. **Specify when this room can be scheduled:** You have following option in booking.
                I. Allow repeating meetings: Check this option to enable repeated meeting.
                II. Allow scheduling only during working hours: Check this option to book during office hrs only.

        III.   Always decline if the end date is beyond this limit: Check to enable this option.

        IV.   Maximum booking lead time (days): Provide no of days.

        V.   Maximum duration (hours): Provide duration in hrs.

       b. **If you want the meeting organizer to receive a reply, enter the text below:** Enter reply here.

8. **Mailbox Permissions:** You can select mailboxes for Send As, and Full Access Permissions.

9. **Calendar Permissions:** Click **Add Permission** to add calendar permissions, Select **Member** and **Permission Level** and save.

Click **Save** when done.

Add Resource Mailbox (Equipment)

To add Equipment mailboxes navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Resource Mailboxes** tab. To add a new Equipment mailbox click **Add Mailbox (Equipment Mailbox)** button.

Under **General Setting**s section provide following:

1. **User Display Name:** Provide User friendly name of Equipment mailbox.
2. **User Principal Name:** Provide UPName of Mailbox.

Licenses

a. **Usage Location:** Select Location.
b. **Assign Licenses:** Select Licenses.

Click **Save** when done.

Mail Contacts

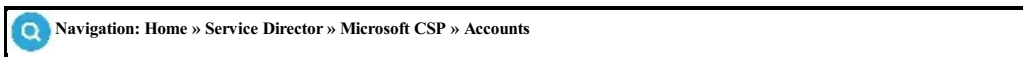To view and add Mail Contacts, navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Mail Contacts** tab. To add a new contact click **Add Mail Contact** button. You can also **Sync All with Microsoft CSP.**

You can search users by Display name and Value.

1. **Display name:** Provide friendly name for Contact
2. **Email Address:** Provide Email address for the contact.
3. **Alias:** Provide alias for the contact
4. **Hide from Exchange Address Lists:** Check if you want to hide from Exchange address list.

Viewing CSP Groups

To view and add Groups, navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Groups** tab. To add a new group click **Add Group** button.

It displays following listing:

1. **Display name:** It shows the display name of group.
2. **Email Address:** It shows the Email address.
3. **Group Type :** It shows the type of group added.
4. **Status:** It shows the status of the group.
5. **Options:** It shows the options to Edit, Remove the group.

Groups

To add Groups navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Groups** tab. To add a new Group click **Add Group** button.

1. **Group Type:** Select the type of group you want to add: Distribution Group, Dynamic distribution group, Mail enabled Security Group, Security Group or Office 365 group.
2. **Display name:** Provide the display name of the group.
3. **Email Address :** Provide Email address of the group.
4. **Group Name:** Provide group name.
5. **Group Alias:** Provide group alias.
6. **Hide from address list:** Check if you want to hide from exchange address list.
7. **Group Owner:** Select owner of the group.
8. **Add group owners as members:** Check if you want to add owners as members.

In addition to above you add also configure following:

1. **Group Members:** Select Group Members.
   a. **Member Join Restriction:**Select join restriction.
      i. **Open:** Anyone can join this group without being approved by the group owners.
      ii. **Closed:** Members can be added only by the group owners. All requests to join will be rejected automatically.
      iii. **Approval Required:** All requests are approved or rejected by the group owners.
   b. **Member Leave Restriction:** Select leave restriction.
      i. **Open:** Anyone can leave this group without being approved by the group owners.
      ii. **Closed:** Members can be removed only by the group owners. All requests to leave will be rejected automatically.
2. **Delivery management:** You can choose delivery management for senders.
   a. **Choose who can send messages to this group:** Select one of the following:
      i. Only senders inside my organization
      ii. Senders inside and outside of my organization
   b. **Accept message from:** Select members.
   c. **Reject message from:** Select members.
3. **Message Approval:** Configure Message approval for group.
   a. **Moderation enabled:** Check if you want to enable.
   b. **Moderated By:** Select members.
   c. **Send moderation notifications :** Select one of the following option.
      i. Notify all senders when their messages aren't approved
      ii. Notify senders in your organization when their messages aren't approved.
      iii. Don't notify anyone when a message isn't approved
   d. **Sender's who do not require approval:** Select members.
4. **Group Delegation:** Select members for Send As and Send on behalf.
5. **Email options:** You can also add Email addresses.
   a. **Mailtip:** Provide Mail tip.
   b. **Email Addresses:** Select the email address type :
      i. SMTP
      ii. Custom address type

Note: The address can be EX, X.500, X.400, MSMail, CcMail, Lotus Notes, NovellGroupWise, EUM Proxy address, and free text.

Click **Save** when done.

Viewing SharePoint

To view SharePoint sites under CSP account navigate to the following path as shown below:

Click on **Manage** in front of the CSP tenant/account. Select **SharePoint** tab.

You can add new sites by clicking on **Add Site**. You can perform Group Operations for SharePoint sites, users, groups etc.

You can also **Sync all from Office 365.**

Add Site

To add new SharePoint site(s) under CSP account navigate to the following path:

Click on **Manage** in front of the CSP tenant/account. Select **SharePoint** tab.

Click on **Add Site** to add a new site.

1. **Title:** Provide site title.
2. **Url:** Provide URL for SharePoint site for e.g. https://portal.office.com
3. **Description:** Provide description.
4. **Owner:** Select owner of site from dropdown list.
5. **Template:** Select template from dropdown list.
6. **Language:** select language from dropdown list.
7. **Request Access Email:** Provide request access email address.
8. **Allow Designer:** Tick means yes.
9. **Share By Email:** Tick means yes.
10. **Allow Rss Feeds:** Tick means yes.
11. **Sharing Capability:** Select sharing capability from dropdown list.
12. **StorageQuota (MB):** Provide storage quota in MB's.

Now click **Add Site** when done.

Edit SharePoint Site

Once the SharePoint site has been added you can **Edit** site and add Users, Groups and Permission Levels. To Edit SharePoint site(s) under CSP account navigate to the following path:

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of the CSP tenant/account. Select **SharePoint** tab.

Now select **Edit** from options column of a SharePoint site.

You will see following tabs under **Edit SharePoint site**.

1. General Information: You can edit general information for SharePoint site.
2. Users: You can add internal /external users.
3. Groups: You can add groups.
4. Permission Levels: You can view permission levels.

General Information (CSP SharePoint)

To Edit SharePoint site(s) under CSP account navigate to the following path:

Click on **Manage** in front of the CSP tenant/account. Select **SharePoint** tab.

Now select **Edit** from options column of a SharePoint site. Under **General Information** tab you can edit following:

1. **Title:** Provide title of SharePoint site.
2. **Description:** Provide description.
3. **Request Access Email:** Provide request access email address.
4. **Allow Designer:** Tick means yes.
5. **Share By Email:** Tick means yes.
6. **Allow Rss Feeds:** Tick means yes.
7. **Sharing Capability:** Select sharing capability from dropdown list.

Click **Save** when done.

Add Internal/External Users (CSP SharePoint)

To Edit SharePoint site(s) under CSP account navigate to the following path:

Click on **Manage** in front of the CSP tenant/account. Select **SharePoint** tab.

Now select **Edit** from options column of a SharePoint site. Under **Users** tab you can add Internal/External Users.

Add Internal Users

Click **Add Internal Users** and provide following:

1. **Users:** Select users from Selectable to Selected.
2. **Permission Levels:** Select permission levels from Selectable to Selected.
3. **Groups:** Select groups from Selectable to Selected.
4. **Is Admin:** Checkbox.

Click **Add User** when done.

Add External Users

Click **Add External Users** and provide following:

1. **Users:** Provide external users.
2. **Permission Levels:** Select permission levels from Selectable to Selected.
3. **Groups:** Select groups from Selectable to Selected.

Click **Add User** when done.

Add Group (CSP SharePoint)

To Edit SharePoint site(s) under CSP account navigate to the following path:

Click on **Manage** in front of the CSP tenant/account. Select **SharePoint** tab.

Now select **Edit** from options column of a SharePoint site. Under **Groups** tab you can add new group by clicking **Add Group**.

1. **Name:** Provide name of group.
2. **Owner:** Select owner of group.
3. **Permissions:** Select permissions.

Click **Add SharePoint Group** when done.

Permission Levels (CSP SharePoint)

To Edit SharePoint site(s) under CSP account navigate to the following path:

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of the CSP tenant/account. Select **SharePoint** tab.

Now select **Edit** from options column of a SharePoint site. Under **Permission Levels** tab you can view permissions levels with Name & Description.

Group Operations (SharePoint)

To add/perform group operations on SharePoint sites under CSP account navigate to the following path as shown below:

Click on **Manage** and select **SharePoint** tab.

Click **Group Operations** to perform Group Actions for SharePoint sites, users, groups etc.

You will see following options for Group Actions.

Select Sites: Select sites from selectables to selected an select following Group Operations.

1. **General Information:** You can perform following under General Information:
   i. **Request Access Email:** Provide and check Update.
   ii. **Allow Designer:** Select one of following three options: a). No Change b). Yes c). No
   iii. **Share By Email:** Select one of following three options: a). No Change b). Yes c). No
   iv. **Allow Rss Feeds:** Select one of following three options: a). No Change b). Yes c). No
   v. **Sharing Capability:** Select and check Update. Click **Save** when done.
2. Add Internal Users
   i. **Users:** Select Users from selectables to selected.
   ii. **Permission Levels:** Select Permission levels from selectables to selected.
   iii. **Groups:** Select Groups from selectables to selected.
   iv. **Is Admin:** Tick means yes.
   v. Click **Save** when done.
3. Add External Users
   i. **Users:** Select Users from selectables to selected.
   ii. **Permission Levels:** Select Permission levels from selectables to selected.
   iii. Click **Save** when done.
4. Add Groups:
   i. **Name:** Enter group(s) name separated by comma
   ii. **Owner:** Select owner from dropdown list.
   iii. **Permission Levels:** Select Permission levels from selectables to selected.
   iv. Click **Save** when done.
5. Update Internal Users
   i. **Users:** Select Users from selectables to selected.
   ii. **Permission Levels To Add:** Tick means yes.
   iii. **Permission Levels To Remove:** Tick means yes.
   iv. **Groups To Add:** Tick means yes.
   v. **Groups To Remove:** Tick means yes.
   vi. **Is Admin:** Select one of following three options: a). No Change b). Yes c). No
   vii. Click **Save** when done.
6. Update External Users
   i. **Users:** Enter user(s) email separated by comma
   ii. **Permission Levels To Add:** Tick means yes.
   iii. **Permission Levels To Remove:** Tick means yes.
   iv. **Groups To Add:** Tick means yes.
   v. **Groups To Remove:** Tick means yes.
   vi. Click **Save** when done.
7. Update Groups:
   i. **Groups:** Enter group(s) name separated by comma.
   ii. **Owner:** Select owner from dropdown list.
   iii. **Permission Levels To Add:** Tick means yes.
   iv. **Permission Levels To Remove:** Tick means yes.
8. **Remove Internal Users:** Select users and provide reason.
9. **Remove External Users:** Select users and provide reason.
10. **Remove Groups:** Select Groups and provide reason.

Configure Direct Routing

To configure direct routing, navigate to the following path as shown below:

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of a CSP Tenant. Now select **Direct Routing** tab.

1. **Domain:** Select domain to configure direct routing. Click **Verify Domain**
2. **Activate Direct Routing:** Click assign License

Click **Finish** when completed.

Once the direct routing is activated you can manage following:

1. **Assignments:** Under Assignments section you can Assign Direct Routing to Users/Resources. You can also use excel to assign direct routing in bulk.
2. **Audio Conferencing:** Under Audio conferencing section you can assign and select phone numbers for audio conferencing.
3. **Phone Numbers:** You can Add Phone numbers, Search and remove under Phone Numbers section
4. **Service Phone Numbers:** You can Add Service Phone numbers, Search and remove under Service Phone Numbers section:
5. **Dial Plan:** You can add Normalization Rules & Dial Plans under Dial Plans.
6. **Resources:** You can view and add new resources.

Assignments (Direct Routing)

To assign numbers in direct routing, navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Select **Direct Routing** tab.

Now select **Assignments** tab.

1. Under **Assignments** section you can **Assign Direct Routing** to Users/Resources. You can also use excel to assign direct routing in bulk.
2. **Sync Users and Resources** which already have assigned direct routing / phone numbers at backend CSP

Assign direct Routing

1. **Users/Resources:** Select User or Resource
2. **Voice Routing Policy:** Select voice routing policy
3. **Enterprise Voice Enabled:** Check box
4. **Hosted Voice Mail Enabled:** Check box
5. **Phone Number:** Select Phone number.

Click **Save** when done.

Audio Conferencing (Direct Routing)

To configure audio conferencing in direct routing, navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Select **Direct Routing** tab.

Now select **Audio Conferencing** tab.

Under **Audio conferencing** section you can assign and select phone numbers for audio conferencing.

1. Select Bridge
2. Select Phone Numbers

Click **Save** when done.

Adding Phone Numbers

To add phone numbers in direct routing, navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Select **Direct Routing** tab. Now select **Phone Numbers** tab. It displays following in the listing:

1. **Phone Number:** It shows phone number that are added.
2. **Assigned to:** It shows user/resource to which phone number is assigned.
3. **Options:** It shows option to remove number.

To add a new number click **Add Phone Number**, provide **phone number** and click **Save**.

Service Phone Numbers

To add service phone numbers in direct routing, navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Select **Direct Routing** tab. Now select **Service Phone Numbers** tab. It displays following in the listing:

1. **Phone Number:** It shows phone number that are added.
2. **Assigned to:** It shows user/resource to which phone number is assigned.
3. **Options:** It shows option to remove number.

To add a new number click **Add Phone Number**, provide **phone number** and click **Save**.

Viewing Dial Plans (Direct Routing)

You can view & manage Dial Plans under Direct routing of CSP tenant. Navigate to following path:

Navigation: Home » Service Director » Microsoft CSP » Accounts

Now click **Manage** in front of CSP tenant and select **Direct Routing** tab. Then select **Dial Plans**.

1. Add Rule
2. Add Dial Plan

Add Normalization Rule (Direct Routing)

You can add normalization rules for your dial plan under Direct routing of CSP tenant. Navigate to following path:

Now click **Manage** in front of CSP tenant and select **Direct Routing** tab. Then select **Dial Plans**.

Click **Add Rule** to add a new normalization rule.

1. **Name:** Provide name of rule.
2. **Description:** Provide description. **Note:** Must include description with slash like 'Global/InternationalRule1'
3. **Pattern:** Provide pattern. **Note:** A regular expression that the dialed number must match in order for this rule to be applied.
   Default: ^(\d{11})$ (Any set of numbers up to 11 digits.)
4. **Translation:** Provide translation. **Note:** The regular expression that will be applied to the number to convert it to E.164 format. **Default:** +$1 (Prefixes the number with a plus sign [+].)
5. **Default Rule:** Select check box to set as default.

Click **Save** when done.

Add Dial Plan (Direct Routing)

You can manage Dial Plans under Direct routing of CSP tenant. Navigate to following path:

Now click **Manage** in front of CSP tenant and select **Direct Routing** tab. Then select **Dial Plans**.

Click **Add Dial Plan** and provide following:

1. **Name:** Provide friendly name for dial plan.
2. **Normalization rule:** Select normalization rule

Click **Save** when done.

Resources (Direct Routing)

You can view & manage resources under Direct routing of CSP tenant. Navigate to following path:

Navigation: Home » Service Director » Microsoft CSP » Accounts

Now click **Manage** in front of CSP tenant and select **Direct Routing** tab. Then select **Resources**.

Click **Add Resources** and provide the required resources.

Navigation: Home » Service Director » Microsoft CSP » Accounts

Viewing Teams

To view and manage teams navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Teams** tab.

You can add new team, **Sync All Teams** and perform bulk Import, Export teams.

Adding Teams

To add teams navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Teams** tab.

Click **Add Team** to add a new team and provide following:

1. **Name:** Provide friendly name of team.
2. **Description:** Provide description.
3. **Type:** Select type a). Public or b). Private
4. **Giphy Content Rating:** Select content rating a). Strict b). Moderate
5. **Owners:** Select owner from Selectable to Selected
6. **Members:** Select members from Selectable to Selected

Click **Save** when done.

Bulk Import Teams

To bulk import teams navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Teams** tab.

Bulk Import Teams

Click **Import** to bulk import teams.

Select Excel file to import: Select File

There are two options to Import:

1. Create New
2. Create new and update existing

Click **Import Teams** when done.

Viewing Channels (Teams)

To view and manage channels navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Teams** tab. Then select **Channels** tab.

You can add new channel, **Sync All Teams** and perform bulk Import, Export channels.

Adding Channels (Teams)

To add channels navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Teams** tab. Then select **Channels** tab.

Click **Add Channel** to add a new team and provide following:

1. **Team:** Select existing team from drop down list.
2. **Name:** Provide friendly name of channel.
3. **Description:** Provide description.
4. **Type:** Select type a). Public or b). Private

Click **Save** when done.

Bulk Import Channels

To bulk import channels navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Teams** tab. Then select **Channels** tab.

Bulk Import Channels

Click **Import** to bulk import channels.

Select Excel file to import: Select File

There are two options to Import:

1. Create New
2. Create new and update existing

Click **Import Channels** when done.

Policies

To add password policies for csp users, navigate to the following path as shown below:

Click on **Manage** in front of a CSP Tenant. Now select **Policies** tab.

Set user passwords to never expire: Check box

Click **Save** when done.

CSP Settings

To enable/disable CSP settings related to SharePoint site navigate to the path mentioned below:

Navigation: Home » Service Director » Microsoft CSP » Accounts

Select **Settings** tab and check **Allow SharePoint Management**. Click **Save** when done.

Phone Numbers Management

To import Phone Numbers to Tenant navigate to the path mentioned below:

Select **Phone Numbers Management** tab and click **Add Phone Numbers**.

Following Options are available:

Select Tenant: Select tenant from the dropdown list.

1. **On Fly:** Add new number on fly.
2. **CSV file to Import:** Click select file.

Click **Save** when done.

Add Phone group (CSP)

To add phone group to your CSP account navigate to the following path:

Select **Phone Numbers Management** tab and then select **Phone Group** tab:

Click **Add Phone Group** button to add a new group:

1. **Tenant Name:** Select tenant
2. **Import Numbers:** You have two options to import numbers
   a. On Fly
   b. CSV file to Import

Once the phone numbers are added you can add Phone Group as well.

Service Phone Numbers (CSP)

To import Service Phone Numbers to Tenant navigate to the path mentioned below:

Select **Service Phone Numbers** tab and click **Add Phone Numbers**.

Following Options are available:

Select Tenant: Select tenant from the dropdown list.

1. **On Fly:** Add new number on fly.
2. **CSV file to Import:** Click select file.

Click **Save** when done.

Add Service Phone Group (CSP)

To add phone group to your CSP account navigate to the following path:

Select **Service Phone Numbers** tab and then select **Phone Group** tab:

Click **Add Phone Group** button to add a new group:

1. **Tenant Name:** Select tenant
2. **Import Numbers:** You have two options to import numbers
   a. On Fly
   b. CSV file to Import

Once the service phone numbers are added you can add Phone Group as well.

Subscriptions Report

To view subscriptions report, navigate to the path below:

Under **Summary** tab you can see the reports in graphic form for each reseller/customer.

Under **Details** tab you can **Export to Excel** and **PDF** as per your requirement.

It shows following for subscriptions report:

Subscription Name, Quantity, Product, Setup Date, End Date, Status, Is Add-on, Is Trial, Auto Renew, Is Commercial SaaS Product, Billing Type, Product type, Publisher, Tenant, Company Name, Tenant Name, Domain Name, Signup date, Package.

Account SKU Config

To view Account SKU ID and its friendly name navigate to the path below:

Under tab **Account SKU**, you can search SKU by Locale, SKU ID, and SKU Friendly Name. It displays following listing:

1. **SKU ID:** It shows the SKU ID.
2. **SKU Friendly Name:** It shows SKU friendly name.

Under tab **Service Plan**, you can search service plan by Locale, Service Plan ID, Service Plan Friendly Name. It displays following listing:

1. **Service Plan ID:** It shows service plan Id.
2. **Service Plan Friendly Name:** It shows the service plan friendly name.

CSP Usage Report

To view CSP usage report, navigate to the path below:
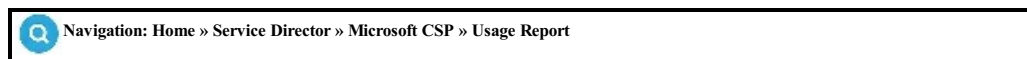
You can export Usage Reports to Excel by clicking **Export to Excel** button.

Under tab **Microsoft CSP Usage Report**, you can view following:

Customer Name, Company Name, Owner, Tenant Name, Active users, Deleted users, Total Users, Domains, User Mailboxes, Shared Mailboxes, Room Mailboxes, Equipment Mailboxes, Skype4B Users, Distribution Groups, Dynamic Distribution Groups, Mail Enabled Security Groups, Simple Security Groups, Microsoft CSP Groups, Mail Contacts, Date Created, Last synced at.

Under tab **O365 Subscription Usage Report**, you can view following:

Customer, Customer number, Company Name, Owner, Tenant Name, Linked With Local Org, Subscription Name, Offer Name, Microsoft Offer Id, Is AddOn, Quantity, Status, Category Name, Package Name, Profile Name, Setup date, End Date, Suspend Date.

Under tab **Detailed Usage Report**, you can view following:

Customer Name, Customer number, Company Name, Owner, Tenant Name, Display name, User Principal Name, Licenses, User Roles, Sign-In Status, Deleted, Mailbox type, Skype4B Enabled.

Under **Azure Usage Report** you can view Azure Usage reports.

Under **Direct Routng Report**, you can view following:

Customer, Company name, Owner, Tenant Name, PSTN Gateway, Associated Phone Numbers, Assigned Phone Numbers, Voice Mail enabled Users, Enterprise Voice Enabled Users.

Microsoft CSP Product

Microsoft CSP plans are created through powerful Service Plan Wizard. Microsoft CSP Plan supports wide variety of Offer/Add-ons. It includes following:

a. Enterprise
b. Government
c. Small Business
d. Trial

To create a CSP plan navigate to following path:

 Navigation: Home » Service Plans » Microsoft CSP

You will see following tabs under which you can create respective products for reseller and customer and Addons.

1. [Reseller Product Listing](#)
2. [Customer Product Listing](#)
3. Add-ons Management

Note: You can **Import** and **Export** CSP offers. To view offers on an existing CSP Product click **Show Offers** from Options column. You can also edit existing CSP plans by clicking on the **Edit.**

Click **Add New Product** button. When the page loads, you will see the following settings.

1. **Product Type:** Select **Microsoft CSP Services** from the drop-down list.
2. **Product Name:** Enter the name of your product.
3. **Microsoft 365 Partner Profile:** Select O365 Partner profile.
4. **Country:** Select country. (Available in Reseller Products)
5. **Locale:** Select Locale.
6. **Is Active:** Select No if you want to disable this product selling.
7. **Usage based billing enabled:** If this is checked **resellers** can add new offers to service plan.
8. **Allow Prorate**: Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
9. **Associate Addon:** You may want to associate add-on with this product. Your choices are:
    i. Optional
    ii. Required
    iii. Suppressed
10. **Associate Domain:** Select how you want to associate domains with this product. Your choices are:
    o Required
11. **Edu-Discount Package:** Check this option to enable.
12. **Date:** This is date set by the system (not editable).
13. **Sync sold plan resources:** Check this option in order to Sync resources to sold existing subscriptions associated with the package. **Note:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings. Skype4B plan or addon is not updated if it is assigned to user already.
14. **Enabled For Commission Reseller(s):** If you check this option the Customer Product Plan will be enabled for Commission type Resellers. (Visible only if Commission Type Reseller option is enabled in Built-in Module.)
    i. All Resellers
    ii. Select Resellers
15. **Product Comments:** Enter any comments you want to associate with this product. These comments show up on the store-front when this product is selected.

Once you click the **Next** button you will be present with series of forms to configure your product.

Resources: In step-2 you will set the resources for the plan.

1. **Linked with local organization:** Check this option if you want to link.
2. **Handle DNS:** Check this option if you want to handle DNS.
    i. Select DNS server

        ii. Select DNS template.
3. **Manage Tenant Using Panel:** If tenant admin credentials provided and tenant management is enabled then Management of tenant will be allowed.

Offers: In step-3 click **Sync Offers/Addons from O365**. You can select different offers/Addons after clicking on plus(+) to expand as below:

   a. Enterprise
   b. Government
   c. Small Business.
   d. Trial

Payment Cycles: This form lets you select Payment Cycles for the plan. You must select at least one payment cycle and payment group.

Select the payment cycle and click right arrow button to move it to ***Selected Cycles*** list.

Select the payment group and click right arrow button to move it to ***Selected Payment Groups*** list.

Price Group: This form lets you set prices for the Payment Cycles and Payment Groups you have selected in the previous step. Here you may set:

   a. Setup Price
   b. Price
   c. Discount

Enter prices in each box.

CSP Commercial SaaS Products: Here you can see CSP Commercial SaaS Products which are exported for the respective Product prices.

Associate Addon: This form lets you associate addon with your hosting plan. Your client may buy these add-on using online store or order them through their customer control center.

Click **Finish** button to complete product setup.

CSP Group Actions

To review CSP Group Jobs navigate to the path as shown below:

CSP Group Actions can be searched by Company Name [Owner], Customer ID, Parameters, Action Type, Status.

Click **Reset Tries Count** to automate provisioning process once the tries count reached '10'. You can also **Clear Completed/Cancelled Jobs**. It displays the following listings:

1. **Status:** It display the status of Job i.e. pending, failed or completed.
2. **Command:** It display the command of the Job i.e. Add, Sync, Remove etc.
3. **Date Entered:** It displays the date of the Job added.
4. **Tries:** It displays the total numbers of tries for a job.
5. **Last Tried:** It displays when the job tried last time.
6. **Entity:** It displays the Entity i.e. user, group, tenant etc.
7. **Customer:** It displays the customer name.
8. **Owner:** It displays the owner name.
9. **Added by:** It displays who (provider, employee, customer etc.) added the Job.
10. **Option:** It displays options to Run, Cancel the job.

Monthly Reseller Report

To view Monthly Reseller Report navigate to the path mentioned below:

You can **Search** reports by following and **Export to Excel**.

1. Company Name (Owner)
2. Month
3. Year
4. Tenant Name
5. Customer ID
6. Customer Name
7. Subscription Name
8. Microsoft Offer Id

You can view following under **Summary** tab:

1. **Subscription Name:** It shows the subscription name.
2. **License Quantity:** It shows the number of license.
3. **Price for Reseller:** It shows the price for reseller.
4. **Total:** It shows total.

You can view detailed report under **Details** tab:

1. **Customer:** It shows name of customer
2. **Company name**: It shows company name
3. **Owner:** It shows owner name.
4. **Tenant Name:** It shows tenant name.
5. **Start Date:** It shows starting date.
6. **Suspend Date:** It shows suspend date.
7. **Subscription Id:** It shows subscription id.
8. **Subscription Name:** It shows subscription name.
9. **Microsoft Offer Id:** It shows Microsoft offer id.
10. **Quantity:** It shows license count.
11. **Provider Cost:** It shows provider cost.
12. **Provider Total:** It shows total cost.

Trial Subscriptions

To view trial subscriptions navigate to the path mentioned below:

You can **Trial Subscriptions** by following:

1. Company Name (Owner)
2. Customer ID
3. Tenant Name
4. Select Status

You can **Trial Subscriptions** by following:

1. Company Name (Owner)
2. Customer ID

License Usage Report

To view License Usage Report navigate to the path mentioned below:

You can **Search** reports by following:

1. Company Name (Owner)
2. Customer
3. Company Name
4. Tenant
5. Domain
6. License

You can view following under **License Usage Report**

1. **Customer:** It displays customer name along with ID.
2. **Company Name:** It displays company name.
3. **Owner:** It displays owner.
4. **Tenant:** It displays tenant name, domain name.
5. **License:** It displays license in use.
6. **Active Units:** It displays active units.
7. **Consumed Units:** It displays consumed units.
8. **Locked Out Units:** It displays locked out units.
9. **Suspended Units:** It displays suspended units.
10. **Warning Units:** It displays warning units.

Tenant Price Report

To view CSP tenant price and package price report navigate to the path mentioned below:

Select **Tenant Price Report** tab. You can **Search** reports by following and **Export to Excel**.

1. Select Profile
2. Select Package
3. Offer Name

Following listing will be shown.

1. Tenant
2. Offers/Add-ons
3. Offer ID
4. Status
5. Price

Package Price Report

Select **Package Price Report** tab. You can **Search** reports by following and **Export to Excel**.

1. Select Profile
2. Select Package
3. Offer Name

Following listing will be shown.

1. Tenant
2. Offers/Add-ons
3. Offer ID
4. Status
5. Price

MimeCast API Settings

Control panel integrates 3rd party software "MimeCast" for email protection software services. MimeCast deliver solutions for email security, continuity and archiving, helping to simplify email management while reducing cost and minimizing risk.

To configure mimecast API navigate to the path mentioned below:

Navigation: Home » Service Director » MimeCast » API Settings

Under **MimeCast API Settings** tab, Fill-in the API information as below:

1. **API URL:** Provide Mimecast API URL.
2. **API Login:** Provide mimecast API login.
3. **API Password:** Provide password.
4. **Application ID:** Provide mimecast application ID
5. **Application Key:** Provide application key.
6. **Access Key:** Provide access key.
7. **Secret Key:** Provide secret key.

Note: To avoid access key and secret key expiration, Please set "Authentication Cache TTL" setting in the service user's effective Authentication Profile to "Never Expire".

Click **Save** when done.

Under **Technical Contacts** tab, click Add contact to add a new contact.

1. **Contact Name:** Provide name of the contact.
2. **Contact Email:** Provide email address.
3. **Default Contact:** Select if it is a default contact.

Click **Save** when done.

MimeCast Account

Control panel integrates 3rd party software "MimeCast" for email protection software services. MimeCast deliver solutions for email security, continuity and archiving, helping to simplify email management while reducing cost and minimizing risk.

To create mimecast account navigate to the path mentioned below:

Navigation: Home » Service Director » MimeCast » Account
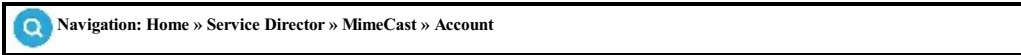
To create a new account click **Create Account.**

You can also **Export** accounts.

Orchestration Module for Windows Work Folders

Control Panel allows Work Folders Hosting Service through its Orchestration Module for Windows Work Folders. Control Panel Orchestration Module for Windows Work Folders is designed for all sizes of service providers wanting to start or grow their Work hosting while minimizing ongoing support costs.

Control Panel Orchestration Module for Windows Work Folders fully automates and controls service delivery for "Windows Server 2016".

Work Folders Hosting is a solution to file syncing and collaboration problems and secure all users data on file servers synced on all devices, stored on-premise at your own file infrastructure of the organization. The files are accessed based on users roles. This adds for security and also Integrity of files data stored on the server.

Note: Please make sure you have subscribed to Orchestration Module for Windows Work Folders to avail this service otherwise you won't be able to utilize this feature. If you have any questions or want to avail this feature, please contact your service provider.

Viewing Work Folders Hosting Server Groups

Work folders hosting module is a powerful tool for **file sharing and storage**.

To view Work Folders Hosting Server Groups navigate to following path:
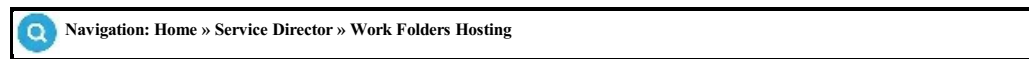
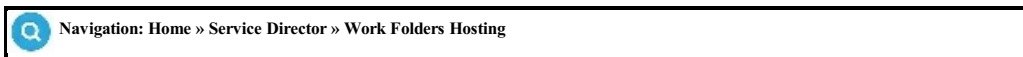**Navigation: Home » Service Director » Work Folders Hosting**

It shows following listing for Server Groups:

1. **Status:** It shows the status enable or disabled
2. **Server Group Name:** It shows the server group friendly name.
3. **Provider:** It shows provider such as windows server 2016.
4. **Options:** It shows following options:
     i. Add Group Member
    ii. Disable
   iii. Edit
    iv. Remove
     v. Sync Quota Templates

Click **Add Server Group** to add a new group.

Viewing Work Folders Hosting Servers

To view Work Folders Hosting Servers navigate to following path:

It shows following listing for Server Groups:

1. **Status:** It shows the status enable or disabled
2. **Server Group Name:** It shows the server group friendly name.
3. **Options:** It shows following options:
    i. Test Service
    ii. Sync Quota Templates
    iii. Disable
    iv. Edit
    v. Remove

Click **Add Server to Group** to add a new server.

Add new Work Folders Server Group

To add new Work Folders Hosting Server navigate to following path:
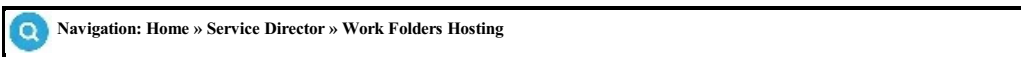
Click **Add Server Group** to add a new Work Folders Server Group.

1. **Server Group Name:** Provide friendly server group name.
2. **Provider:** Select provider
3. **Active Directory Domains:** Select active directory domain
4. **Storage Configuration:** Select following:
   a. Standalone
   b. **Clustered:** When clustered is selected. Provide below
      i. **Cluster Name:** Provide cluster name.
      ii. **Public URL:** Provide public URL.

In case of **Clustered** server group you have to add new storage location. See Also Add new storage location

Add New Work Folders Server

To add new Work Folders Hosting Server navigate to following path:

Click **Add Server to Group** to add a new server.

Case-1: In case of **Standalone** Storage configuration, provide following:

1. **Server FQDN:** Provide Server FQDN
2. **IP:** Provide IP address.
3. **Public URL:** Provide Public URL.

To Add a new Storage location Click [Add New Storage Location](#)

Click **Finish** when done.

Case-2: In case of **Clustered** Storage configuration, provide following:

1. **Server FQDN:** Provide Server FQDN
2. **IP:** Provide IP address.
3. **Public URL:** Provide Public URL.

Click **Finish** when done.

Add New Storage Location

To add new storage location navigate to following path:

There are two types of storage configurations:

1. Standalone
2. Clustered

In **Stand Alone** type server group these storage locations are added\managed at server level.

In **Clustered** type server group these storage locations are added\managed at server group level.

Case-1: In case of **Standalone** storage:

Click on the **Server Group Name** a new tab will open, now click **Edit** from Options column in front of Server.

Now Click **Add New Storage Location**

1. **Storage Location Path:** Provide path for storage location
2. **Max Size (GBs):** Provide size in GB's
3. **Maximum file upload size in MBs:** Provide maximum upload size.
4. **Customer:** Select customers

Click **Add** when done.

Case-2: In case of **Clustered** storage:

Click on **Edit** from Options column in front of Server Group.

Now Click **Add New Storage Location**

1. **Storage Location Path:** Provide path for storage location
2. **Max Size (GBs):** Provide size in GB's
3. **Maximum file upload size in MBs:** Provide maximum upload size.
4. **Customer:** Select customers

Click **Add** when done.

Sync Quota Templates

To sync quota templates navigate to following path:

You can perform sync quota template both at the server group and server level.

Case a: Server Groups

Click on "**Sync Quota Templates"** from options column in front of Server Group. It will sync all "File Storage Quota Templates" from all servers added under this server group to database.

Case b: Work Folder Servers

Click on the **Server Group Name** a new tab **Work Folder Servers** will open,

Now click "**Sync Quota Templates**" will sync all "File Storage Quota Templates" from servers to database.

Work Folders Accounts

To view work folders accounts navigate to following path:

You can search work folders account by following:

1. Select **Company Name[Owner]**
2. Customer ID
3. Customer Name
4. Company name
5. Hosting Id
6. Package Name
7. Domain Name
8. Select **Status**

Click **Search**.

Click **Manage** in front of a work folders account in options column. It displays following in the listing:

1. **Status:** It shows the status of work folder account.
2. **Subsc.ID:** It shows the subscription id.
3. **Domain Name:** It shows the domain name.
4. **Package**: It shows the name of package.
5. **Customer:** It displays the customer id along with customer name.
6. **Owner:** It displays the owner name.
7. **Work Folders:** It shows the number of work folders added.
8. **Options:** Click on **Manage** to manage work folders account.

Work Folders Service Management

To manage work folders accounts navigate to following path:

Click **Manage** in front of a work folders account in options column. Once you click **Manage**, you will be on following navigation path:

You will be able to view details of the subscription and will be able to perform various operations on subscription. You will see following details on the **Subscription Detail** page.

General Info tab shows below mentioned sections:

1. **Operations:** You can perform operations like **Put On Hold**, **Generate Renewal Invoice**, and **Cancel Subscription**.
2. **Service Summary:** Shows the service summary of the subscription i.e. status and the provider type.
3. **Notes:** These are notes/service messages by Control Panel or any notes added by the service provider for tagging.

Resources tab shows below mentioned sections:

1. **Operations:** You can perform operations like **Edit Resources**.
2. **Limits:** It shows the following listings:
    i. Resource name
    ii. Allocation
    iii. Net Allocation
    iv. Utilized
    v. Remaining

Add-ons tab shows the record for the total no of add-ons created on the subscription. Addon enhances the capability of already created base plan through increase of features. Under **Add-ons** tab you can click on **Add-on Resource** button to enhance the capability.

Billing tab shows the listing for the following:

1. **Doc. Num:** It shows the number of the document.
2. **Document Type:** It shows the type of the document.
3. **Total Balance:** It displays the balance in specified currency.
4. **Date:** It displays the date.
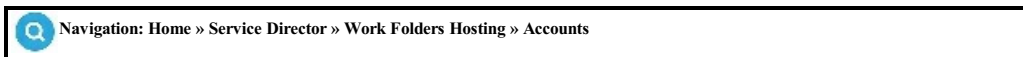
Organization tab: It shows following tab:

1. [Organization:](#) You can view Active directory organization.
2. [Security Groups:](#) You can add and manage security groups.
3. [Users:](#) You can add and mange Active directory users.
4. [Group Actions:](#) You can view group actions for users and security groups.

Work Folders tab: You can add and manage [work folders](#).

File Share tab: You can also manage [file share](#).

Viewing Organization

To view organization navigate to the following path:

Click **Manage** in front of a work folders account in options column. You will be on following navigation path:

Select **Organization** tab. It shows following in the listing:

Organization tab: It shows the Organization detail.

1. **Organization Name:** It shows the name of organization.
2. **Organization Internal name:** It shows the internal name of organization.
3. **Details:** It shows following under details:
    i. **Active Directory Domain:** It shows the active directory domain.
    ii. **ADSync Enabled:** It shows Yes or No.
    iii. **ADSync Template:** If ADSync is enable it shows template name.
    iv. **Subscriptions:** It shows the subscription id name.

Security Group tab: It shows the [Security Groups](#).

Users tab: It shows the Active directory [users](#) added.

Group Actions tab: It shows the [group actions](#) performed on users and security groups.

Add Security Group

To view and add Security Groups for work folders organization navigate to the following path:

Navigation: Home » Service Director » Work Folders Hosting » Accounts

Click **Manage** in front of a work folders account in options column.

Navigation: Home » Customer Manager » Subscription List » Subscription Detail

Select **Organization** tab and then select **Security Groups** tab. It display following in the listing:

1. **Display name:** It shows the display name.
2. **SAM Account Name:** It shows SAM account name.
3. **Group Scope:** It shows scope of group.
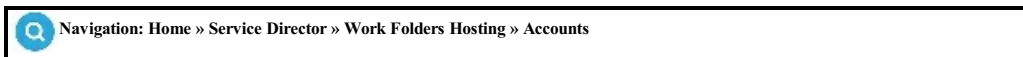4. **Options:** You can **remove** the SG.

Click **Add Security Group** button to add a new Security Group (SG):

1. **Display name:** Provide SG display name.
2. **Group Scope:** It shows following option: Domain Local, Global, Universal
3. **Group Members:** Add users in group as members.
4. **Automatically add users in group:** Check this box to automatically add new users in SG.

Click **Save** when done.

Viewing Users

To view AD users in work folder organization navigate to the following path:

Click **Manage** in front of a work folders account in options column.

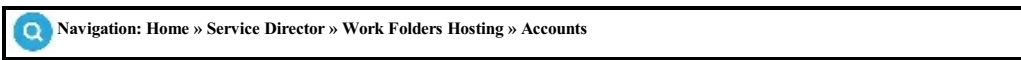Select **Organization** tab and then select **Users** tab.

To search **Users**, provide search fields as per requirement, then click on **Search** button. You can Add User, Add Bulk User, Update Bulk Users.

It displays the following in listings:

1. **Status:** It shows the status of user.
2. **User:** It shows the logon name.
3. **Details:** It shows the details of user as below:
    i. **Logon Name:** It shows logon name.
    ii. **Organization Name:** It displays Organization name.
    iii. **Active Directory Domain:** It is active directory domain name.
    iv. **Customer:** It is name of the customer.
    v. **Logon Hours Template:** It shows if logon hour template is assigned.
4. **Options:** It shows following option for AD user
    i. Edit
    ii. Clone
    iii. Change Password
    iv. Disable
    v. Unlock
    vi. Remove

Adding User

To add AD users in work folder organization navigate to the following path:

Click **Manage** in front of a work folders account in options column.

Select **Organization** tab and then select **Users** tab. To add a new active directory user click **Add User** button. You will land on following page:

To ad active directory **Users**, provide following fields as per requirement, then click on **Save** button.

1. **Organization Unit:** Select Organization unit.
2. **First Name:** Provide first name.
3. **Last Name:** Provide last name.
4. **User Display Name:** Provide user display name.
5. **User Principal Name:** Provide UPName.
6. **Email:** Provide email address.
7. **Password:** Provide password.
8. **Optional Settings:** Provide optional settings, click Plus (+) sign to expand.
9. **Password Settings:** Select password settings, click Plus (+) sign to expand.
10. **Group Membership:** Select security group membership, click Plus (+) sign to expand.
11. **Send Email:** Check this box to send email.
12. **Send email to:** Provide email address.

Update Bulk Users

To update bulk users navigate to following path:

Navigation: Home » Service Director » Work Folders Hosting » Accounts

Click **Manage** in front of a work folders account in options column.

Navigation: Home » Customer Manager » Subscription List » Subscription Detail
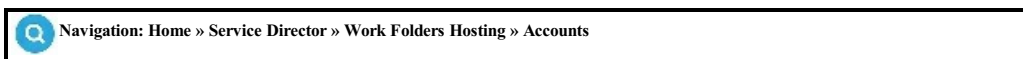
Select **Organization** tab and then select **Users** tab. Now click **Update Bulk Users**:

1. **Organization Unit:** Select Organization unit
2. **Select user to clone:** Check box to clone users
3. **CSV file to import:** Select CSV file.
4. **Send password email to alternate email if password being updated:** Checkbox
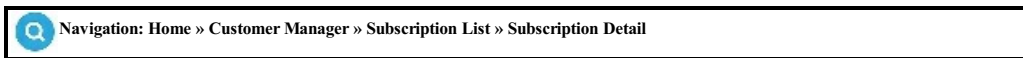5. **Retain existing attribute values for empty field in CSV:** Checkbox.

Click **Save** when done.

Navigation: Home » Service Director » Work Folders Hosting » Accounts

Group Actions

To view group actions performed on Users and Security Groups navigate to following path:

Click **Manage** in front of a work folders account in options column.

Select **Organization** tab and then select **Group Actions** tab. You can **Search** group actions by providing following:

1. Parameter
2. Select Action type
3. Select Status

Click **Reset Tries Count** to automate provisioning process once the tries count reached '10'. You can also **Clear Completed/Cancelled Jobs**. It displays the following listings:

1. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.
2. **Command:** It is the command on which group action is to be performed.
3. **Date Entered:** It displays the date.
4. **Tries:** It shows the number of entered tries.
5. **Last Tried:** It displays the last try.
6. **Customer ID:** It is the customer id.
7. **Customer Name:** It is the customer name.
8. **Owner:** It is the owner of the exchange.
9. **Added by:** It displays the name of the employee.
10. **Option:** It shows the option to **RUN** and **Cancel** the action.

Add New Work Folder

To add work folder navigate to the following path:
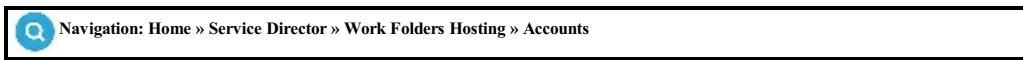
> 🔍 **Navigation: Home » Service Director » Work Folders Hosting » Accounts**

Click **Manage** in front of a work folders account in options column. You will be on following navigation path:

> 🔍 **Navigation: Home » Customer Manager » Subscription List » Subscription Detail**

Select **Work Folders** tab. It shows following in the listing:

1. **Sync Share Name:** It shows file share name
2. **Details:** It displays following detail:
    i. Server FQDN
    ii. Path
    iii. Status
    iv. Allocated Storage
    v. Last synced at
3. **Options:** It shows option to Edit, disable and Delete Work folders.
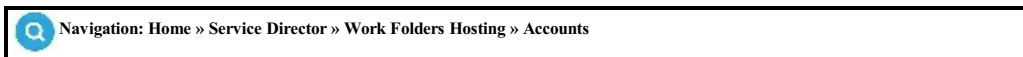
To add a new work folder click **Add New Work Folder.** You can also **Sync all Work Folders Used Storage.**

1. **Storage Status:** It shows storage status
2. **Sync Share Name:** Provide sync share name
3. **Select Quota Template:** Select template for file share
4. **Specify custom size:** Specify Custom size
5. **User Folder Structure:** Choose a folder-naming format based on whether you have to maintain user folder compatibility or want to support identical aliases across domains.
    a. **User alias:** Maintains compatibility with existing user folders that use aliases for their names.
    b. **User alias@domain:** Eliminates conflicts between identical user aliases in different domains.
6. **Max. File Upload Size:** Select maximum upload size
7. **Description:** Provide description
8. **Sync Access:** Select from Selectable to selected.
9. **Device Policies:** Select Encrypt Work folders or Automatically Lock Screen and require password

Click **Save** when done.

Add New File Share

To add file share navigate to the following path:

> 🔍 **Navigation: Home » Service Director » Work Folders Hosting » Accounts**

Click **Manage** in front of a work folders account in options column. You will be on following navigation path:

> 🔍 **Navigation: Home » Customer Manager » Subscription List » Subscription Detail**

Select **File Share** tab. It shows following in the listing:

1. **File Share Name:** It shows file share name
2. **Details:** It displays following detail:
   i. Path
   ii. Allocated Storage
   iii. Current Storage Used
   iv. Quota Template Name
   v. Last synced at
3. **Options:** It shows option to Edit and Remove file share.

To add a new file share click **Add New file Share.** You can also **Sync all File Share Used Storage.**

1. **Storage Status:** It shows storage status
2. **File Share Name:** Provide file share name and select following:
   a. Enable access-based enumeration
   b. Allow caching of shares
   c. Encrypt data access.
3. **Select Quota Template:** Select template for file share
4. **Specify custom size:** Specify Custom size
5. **Sync Access:** Select from Selectable to selected.

Click **Save** when done.

Work Folder Hosting Product

Work Folders Hosting plans are created through powerful Service Plan Wizard. It includes following:

1. Reseller Product Listing
2. Customer Product Listing
3. Add-ons Management

To create a work folders plan navigate to following path:

Note: You can also edit existing work folders plans by clicking on the **Edit**link.

Click **Add New Product** button. When the page loads, you will see the following settings.

1. **Product Type:** Select **Work Folders Hosting** from the drop-down list.
2. **Product Name:** Enter the name of your product.
3. **Provider:** Select Provider
4. **Server Group:** Select server
5. **Is Active:** Select No if you want to disable this product selling.
6. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
7. **Associate Add-on:** You may want to associate add-on with this product. Your choices are:
    a. Optional
    b. Required
    c. Suppressed
8. **Associate Domain:** Select how you want to associate domains with this product. Your choices are:
    - Required
9. **Sync sold plan resources:** Check this option in order to Sync resources to sold existing subscriptions associated with the package. **Note:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings. Skype4B plan or add-on is not updated if it is assigned to user already.
10. **Enabled For Commission Reseller(s):** If you check this option the Customer Product Plan will be enabled for Commission type Resellers. (Visible only if Commission Type Reseller option is enabled in Built-in Module.)
    i. All Resellers
    ii. Select Resellers
11. **Product Comments:** Enter any comments you want to associate with this product. These comments show up on the store-front when this product is selected.

Once you click the **Next** button you will be present with series of forms to configure your product.

Resources: In step-2 you will set the work folders resources for the plan. Provide **Total Storage Quota in GB(s)**

Payment Cycles: This form lets you select Payment Cycles for the plan. You must select at least one payment cycle and payment group.

Select the payment cycle and click right arrow button to move it to **Selected Cycles** list.

Select the payment group and click right arrow button to move it to **Selected Payment Groups** list.

Price Group: This form lets you set prices for the Payment Cycles and Payment Groups you have selected in the previous step. Here you may set:

a. Setup Price
b. Price
c. Discount

Enter prices in each box.

Possible Product Upgrade / Downgrade: Here you can configure the upgrade and downgrade behavior of this

product. When a product is purchased, your client may perform upgrade/downgrade from their control center without your involvement.

Associate Add-on: This form lets you associate add-on with your hosting plan. Your client may buy these add-on using online store or order them through their customer control center.

Click **Finish** button to complete product setup.

Usage Report

To view usage report for work folders navigate to following path:

All the reports can be exported to excel by clicking in **Export to Excel.**

Under **Organization Usage Report** tab you can search by following:

1. Select Company Name[Owner]
2. Customer Name
3. Organization Name
4. Company Name

Click **Search**.

Under **Work Folder Usage Report** tab you can search by following:

1. Select Company Name[Owner]
2. Customer Name
3. Organization Name
4. Company Name
5. Display Name
6. Work Folder Path
7. Select Quota Template
8. Select Server
9. Select **Status**

Click **Search**.

Orchestration Module for Remote Desktop Services

Control Panel allows Remote Desktop Service through its Orchestration Module for Remote Desktop Services. Control Panel Orchestration Module for RDS is designed for all sizes of service providers wanting to start or grow their RDS Hosting business while minimizing ongoing support costs.

Control Panel Orchestration Module for Remote Desktop Service (RDS) fully automates and controls service delivery for Microsoft Remote Desktop Service manages billing and provides self service control panel to your customer.

Note: Please make sure you have subscribed to Orchestration Module for RDS Hosting to avail this service otherwise you won't be able to utilize this feature. If you have any questions or want to avail this feature, please contact your service provider.

Overview RDS Server Groups

With Panel you may organize your RDS servers in groups. By Using Control Panel you may organize your RDS Servers in groups and may create different service plans for Resellers/Customers:

 Example:

1. Create a server group called **RDS Servers**.
2. Assign **RDS2019** as the provider.
3. Create a hosting plan "**RDS Hosting**" and assign Reseller/Customers group to this package.
4. Now, when you sell RDS Hosting, Panel will automatically provision the hosted RDS service.
5. Remove Server from group. You cannot remove a server if there are active subscriptions on it.

Viewing RDS Server Groups

To view/manage RDS server groups navigate to the following path:

To add a new server group click on **Add Server Group** button. The list of server groups displays following:

1. **Status:** It show the status of the Server Groups.
2. **Server Group Name:** Friendly name.
3. **Provider:** It shows the RDS server provider for this server group.
4. **Options:** Following are the options:
    i. **Edit:** Click on **Edit** to edit server group properties.
    ii. **Servers:** Click on Servers to add new servers.
    iii. **Remove:** Click to remove server group. You cannot remove a server group if there are active servers with active subscriptions.

RDS Server Group Management

To add RDS server groups navigate to the following path:
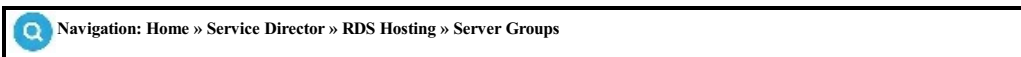
To add a new server click on **Add Server Group** button.

Complete the form by providing below:

1. **Server Group Name:** Provide friendly server group name.
2. **Provider:** Select RDS 2016.
3. **Active Directory Domains:** Select active directory domain from dropdown.
4. **Enabled:** Check this box to enable.
5. **Override domain credentials:** Use this option if you want to use a different account for this service from what is specified in active directory domain settings. In the **Server Credentials** section fill in the following fields:
    i. **Username:** Provide Username.
    ii. **Password:** Provide password.
    iii. **Confirm password:** Retype password.

Click **Save** when done.

Viewing RDS Servers

To view/manage RDS servers navigate to the following path:

To view RDS servers click on **Servers** from **options** in front of a RDS Server Group. You will be on following path:

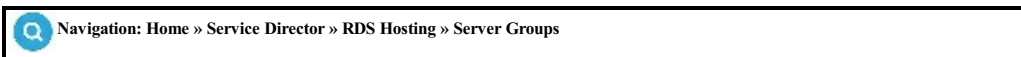To add a new server to the group click on **Add Server** button. The servers displays the following listings:

1. **Status:** It show the status of the Servers.
2. **Server FQDN:** Friendly name.
3. **IP:** It displays the IP address.
4. **Options:** Following are the options:
   i. **Test Service:** To test the RDS servers click on Test Service.
   ii. **Edit:** Click Edit to edit server properties.
   iii. **Remove:** Click to remove server. You cannot remove a server if there are active servers with active subscriptions.

RDS Servers Management

To add new RDS server navigate to the following path:

To add a new server click on **Servers** button from **options** in front of a RDS Server Group. You will be on following path:

Now click **Add server** to add a new RDS server and provide following:

1. **Server FQDN:** Provide RDS server FQDN. This is the Fully Qualified Domain Name for RDS Server.
2. **Server IP:** Provide RDS server IP address. This is the IP address (as per IP Binding in Remote Configuration Studio) of RDS Server.
3. **Roles:** Select roles from the dropdown list. This is the designated Server Role (deployed on remote RDS server). You can select "RD Connection Broker", "RD TS Gateway" or "Both" from drop-down:
4. **Enabled:** Check this box to enable.

Click **Save** when done.

RDS Accounts

To view/manage RDS accounts navigate to following path:

It displays the following listing:

1. **Status:** It show the status of the RDS account.
2. **Subsc.ID:** It displays the subscription number.
3. **Organization Name:** It displays the name of the RDS Organization.
4. **Package Name:** It displays the name of package in use.
5. **Customer:** It shows the customer ID and name.
6. **Owner:** It displays the name of owner.
7. **Options:** Click on **Manage** from option to [manage services for RDS](#) accounts.

RDS Service Management

To manage RDS accounts navigate to following path:

Click **Manage** in front of a RDS account in options column. Once you click **Manage**, you will be on following navigation path:

You will be able to view details of the subscription and will be able to perform various operations on subscription. You will see following details on the **Subscription Detail** page.

General Info tab shows below mentioned sections:

1. **Operations:** You can perform operations like **Put On Hold**, **Generate Renewal Invoice**, and **Cancel Subscription**.
2. **Service Summary:** Shows the service summary of the subscription i.e. status and the provider type.
3. **Notes:** These are notes/service messages by Control Panel or any notes added by the service provider for tagging

Add-ons tab shows the record for the total no of add-ons created on the subscription. Addon enhances the capability of already created base plan through increase of features. Under **Add-ons** tab you can click on **Add-on Resource** button to enhance the capability.

Billing tab shows the listing for the following:

1. **Doc. Num:** It shows the number of the document.
2. **Document Type:** It shows the type of the document.
3. **Total Balance:** It displays the balance in specified currency.
4. **Date:** It displays the date.

RDS Organization tab: It shows following tab:

1. RDS Organization: You can view Active directory organization.
2. Security Groups: You can add and manage security groups.
3. Users: You can add and mange Active directory users.
4. Group Actions: You can view group actions for users and security groups.

Policies tab: You can add and manage policies for RDS.

User Settings tab: You can add and manage user settings.

Viewing RDS Organization

To view RDS organization navigate to the following path:

Navigation: Home » Service Director » RDS Hosting » Accounts

Click **Manage** in front of a RDS account in options column. You will be on following navigation path:

Navigation: Home » Customer Manager » Subscription List » Subscription Detail

Select **RDS Organization** tab.

RDS Organization tab: It shows the RDS organization detail.

1. **Organization Name:** It shows the name of organization.
2. **Organization Internal name:** It shows the internal name of organization.
3. **Details:** It shows following under details:
     i. **Active Directory Domain:** It shows the active directory domain.
    ii. **ADSync Enabled:** It shows Yes or No.
   iii. **ADSync Template:** If ADSync is enable it shows template name.
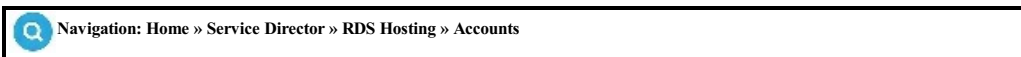   iv. **Subscriptions:** It shows the subscription id name.

Security Group tab: It shows the Security Groups.

Users tab: It shows the Active directory users added.

Group Actions tab: It shows the group actions performed on users and security groups.

Add Security Group

To view and add Security Groups for RDS organization navigate to the following path:

Click **Manage** in front of a RDS account in options column.

Select **RDS Organization** tab and then select **Security Groups** tab. It display following in the listing:

1. **Display name:** It shows the display name.
2. **SAM Account Name:** It shows SAM account name.
3. **Group Scope:** It shows scope of group.
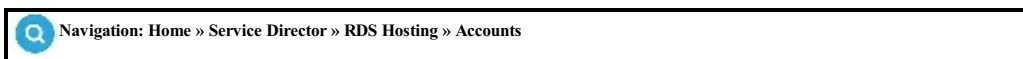4. **Options:** You can **remove** the SG.

Click **Add Security Group** button to add a new Security Group (SG):

1. **Display name:** Provide SG display name.
2. **Group Scope:** It shows following option: Domain Local, Global, Universal
3. **Group Members:** Add users in group as members.
4. **Automatically add users in group:** Check this box to automatically add new users in SG.

Click **Save** when done.

Viewing Users

To view AD users in RDS organization navigate to the following path:

Click **Manage** in front of a RDS account in options column.

Select **RDS Organization** tab and then select **Users** tab.

To search **Users**, provide search fields as per requirement, then click on **Search** button. You can Add User, Add Bulk User, Update Bulk Users.

It displays the following in listings:

1. **Status:** It shows the status of user.
2. **User:** It shows the logon name.
3. **Details:** It shows the details of user as below:
   i. **Logon Name:** It shows logon name.
   ii. **Organization Name:** It displays Organization name.
   iii. **Active Directory Domain:** It is active directory domain name.
   iv. **Customer:** It is name of the customer.
   v. **Logon Hours Template:** It shows if logon hour template is assigned.
4. **Options:** It shows following option for AD user
   i. Edit
   ii. Clone
   iii. Change Password
   iv. Disable
   v. Unlock
   vi. Remove

Adding User

To add AD users in RDS organization navigate to the following path:

Click **Manage** in front of a RDS account in options column.

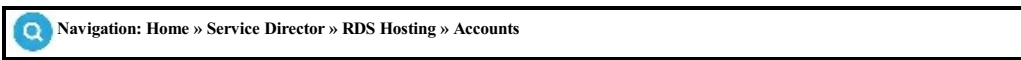Select **RDS Organization** tab and then select **Users** tab. To add a new active directory user click **Add User** button. You will land on following page:

To ad active directory **Users**, provide following fields as per requirement, then click on **Save** button.

1. **Organization Unit:** Select Organization unit.
2. **First Name:** Provide first name.
3. **Last Name:** Provide last name.
4. **User Display Name:** Provide user display name.
5. **User Principal Name:** Provide UPName.
6. **Email:** Provide email address.
7. **Password:** Provide password.
8. **Optional Settings:** Provide optional settings, click Plus (+) sign to expand.
9. **Password Settings:** Select password settings, click Plus (+) sign to expand.
10. **Group Membership:** Select security group membership, click Plus (+) sign to expand.
11. **Send Email:** Check this box to send email.
12. **Send email to:** Provide email address.

Update Bulk Users

To update bulk users navigate to following path:

Click **Manage** in front of a RDS account in options column.

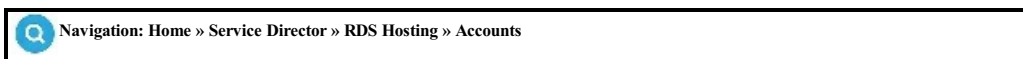Select **RDS Organization** tab and then select **Users** tab. Now click **Update Bulk Users**:

1. **Organization Unit:** Select Organization unit
2. **Select user to clone:** Check box to clone users
3. **CSV file to import:** Select CSV file.
4. **Send password email to alternate email if password being updated:** Checkbox
5. **Retain existing attribute values for empty field in CSV:** Checkbox.

Click **Save** when done.

Group Actions

To view group actions performed on Users and Security Groups navigate to following path:

Click **Manage** in front of a work folders account in options column.

Select **RDS Organization** tab and then select **Group Actions** tab. You can **Search** group actions by providing following:

1. Parameter
2. Select Action type
3. Select Status

Click **Reset Tries Count** to automate provisioning process once the tries count reached '10'. You can also **Clear Completed/Cancelled Jobs**. It displays the following listings:

1. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.
2. **Command:** It is the command on which group action is to be performed.
3. **Date Entered:** It displays the date.
4. **Tries:** It shows the number of entered tries.
5. **Last Tried:** It displays the last try.
6. **Customer ID:** It is the customer id.
7. **Customer Name:** It is the customer name.
8. **Owner:** It is the owner of the exchange.
9. **Added by:**b It displays the name of the employee.
10. **Option:** It shows the option to **RUN** and **Cancel** the action.

Adding Policies

To view and add policies for RDS navigate to following path:
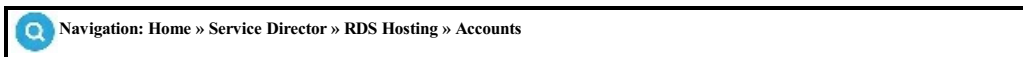
Click **Manage** in front of a RDS account in options column. You will be on following navigation path:

Select **Policies** tab. It shows following in the listing:

1. **Name:** It displays the name of policy.
2. **Description:** It displays the description.
3. **Options:** It shows option to **Edit** and **Remove** the policy.

To add a new policy click **Add Policy** button and provide following:

1. **Name:** Provide friendly name.
2. **Description:** Provide description.
3. **Users and Groups:** Select users and security groups from selectable to selected.
4. **Session Collections:** Select sessions collections.
5. **Virtual Desktop Collections Pooled:** Select virtual desktop collections pooled.
6. **Virtual Desktop Collections Personal:** Select virtual desktop collections personal.
7. **TS Gateway Policies:** Select TS gateway policies.
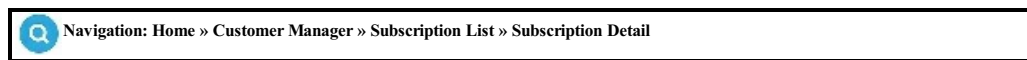8. **Published Apps:** Select published apps.

Click **Save** when done.

User Settings

To view and add user settings for RDS navigate to following path:

Click **Manage** in front of a RDS account in options column. You will be on following navigation path:

Select **User Settings** tab. It shows following in the listing:

1. **Name:** It displays the name of policy.
2. **Description:** It displays the description.
3. **Options:** It shows option to **Edit** and **Remove** the policy.

Click **Add Users Settings** to add new user settings for RDS and provide following:

1. **Name:** Provide name of a user setting.
2. **Description:** Provide description.
3. **Profile:** There is User Profile and Home folder.
    a. **User Profile:** For User Profile provide
        i. **Profile path:** Provide profile path.
        ii. **Logon script:** Provide logon script.
    b. **Home Folder:** Provide following for home folder:
        i. **Local Path:** Provide local path.
        ii. **Connect:** Select Drive **To:** provide To
4. **Environment:** There is starting program and client devices.
    a. **Starting Program**
        i. **Program file name:** Provide program file name.
        ii. **Start in:** Provide start in.
    b. **Client Devices**
        i. Connect client devices at logon
        ii. Connect client printers at logon
        iii. Default to main client printer
5. **Remote Desktop Services User Profile**
    a. **User Profile:** Provide user profile.
    b. **Remote Desktop Services Home Folder:** For Home folder provide:
        i. **Local Path:** Provide local path.
        ii. **Connect:** Select Drive **To:** provide To
        iii. Deny this user permissions to log on to Remote Desktop Session Host server: Check this option.
6. **Applies To:** Select users and security groups.

Click **Save** when done.

RDS Hosting Plan Management

Automation Module for RDS allows you to add hosting products for your customers. It includes following:

1. [Reseller Product Listing](#)
2. [Customer Product Listing](#)
3. Add-ons Management

To view/manage RDS products navigate to the following path:

Note: You can also edit existing RDS products plans by clicking on the **Edit** link.

Click on **Add New Product** button. When the page loads, you will see the following settings.

1. **Product Type: RDS Hosting** from the drop-down list is selected.
2. **Product Name:** Enter the name of your product.
3. **Provider:** Select **RDS 2016** as a provider.
4. **Server Group:** Select the desired server group from the drop down list.
5. **Is Active:** Select No if you want to disable this product selling.
6. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
7. **Associate Addon:** You may want to associate add-on with this product. Your choices are:
   a. Optional
   b. Required
   c. Suppressed
8. **Sync sold plan resources:** Check this option in order to Sync resources to sold existing subscriptions associated with the package. **Note:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings. Skype4B plan or addon is not updated if it is assigned to user already.
9. **Enabled For Commission Reseller(s):** If you check this option the Customer Product Plan will be enabled for Commission type Resellers. (Visible only if Commission Type Reseller option is enabled in Built-in Module.)
   a. All Resellers
   b. Select Resellers
10. **Product Comments:** Enter any comments you to associate with this product. These comments show up on the store-front when this product is selected.

Resources: Once you click the **Next** button you will be presented with series of forms to configure your product.

1. Session Collections
2. Virtual Desktop Collections Pooled
3. Virtual Desktop Collections Personal
4. TS Gateway Policies
5. Published Apps

Payment Cycles: This form lets you select Payment Cycles for the plan. You must select at least one payment cycle and payment group.

Select the payment cycle and click right arrow button to move it to **Selected Cycles** list.

Select the payment group and click right arrow button to move it to **Selected Payment Groups** list.

Payment Groups: This form lets you set prices for the Payment Cycles and Payment Groups you have selected in the previous step. Here you may set:

a. Setup Price
b. Price
c. Discount

Enter prices in each box.

Possible Product Upgrade / Downgrade: Here you may configure the upgrade and downgrade behavior of this product. When a product is purchased, your client may perform upgrade/downgrade from their control center without your involvement.

Associate Addon: This form lets you associate addon with your hosting plan. Your client may buy these addon using online store or order them through their customer control center.

Click on **Finish** button to complete product setup.

SSL Accounts

To view SSL accounts in control panel, navigate to the following path:

You can search and Manage SSL accounts.

To view DigiCert certificates select **DigiCerts Certificates** tab.

Hosting Plans Management Overview

Control Panel offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you may easily create hosting plans and sell them via Offline order form or integrated store-front. Following service plans are available in the Control Panel:

1. [Domain Name Plan Management](#)
2. [Shared Hosting Plan Management](#)
3. [Active Directory Plan Management](#)
4. [Exchange Hosting Plan Management](#)
5. [Hosted SharePoint Plan Management](#)
6. [Hosted CRM Plan Management](#)
7. [Skype for Business Hosting Plan Management](#)
8. [Miscellaneous Plan Management](#)
9. [Virtual Machines Hosting Plan Management](#)
10. [Microsoft Cloud Solution Provider (CSP)](#)
11. [DigiCert SSL Plan Management](#)
12. [Work Folders Hosting Plan Management](#)
13. [RDS Hosting Plan Management](#)
14. Add-ons Management

Domain Name Plan Management

Control Panel Supports automated domain registration, renewal, and transfers with supported domain providers. Currently following domain providers are supported:

1. DirectI (Logic Boxes)
2. DK Hostmaster Registry
3. Enom
4. GoDaddy
5. Offline Domain Registrar
6. Open SRS
7. Registry.be
8. RRPproxy
9. RRPproxy EPP
10. SIDN EPP
11. StarGate
12. TransIP

You can add as many TLDs (Top Level Domains) to the system as you need. You can assign TLDs to appropriate domain registration supported by the system.

TLD Listing

To create TLD navigate to following path:

> 🔍 **Navigation: Home » Service Plans » Domain Name Products**
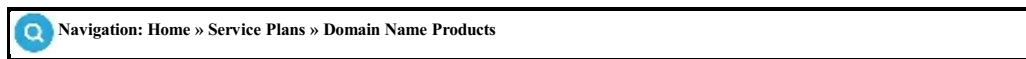
Here you will see list of TLDs created in the system. Here you can disable TLD or set pricing instantly.

Note: To edit existing TLDs click on **Edit** link and follow the instructions on screen.

To create TLDs

Click **Add New TLD** button. When the page loads, you will see the following settings.

1. **Extension:** Enter TLD name here. For example, for .COM TLD you will enter "COM" in this box.
2. **Registrar:** Select the Registrar provider who handles this TLD. You may activate registrar providers from *System Configuration » Providers » Domain Registrars*.
3. **Active:** Uncheck if you want to disable this product selling.
4. **Is Transferable:** If this is checked then client can place transfer orders for this TLD on store front.
5. **Minimum Term:** This is minimum period this TLD can be registered e.g. for .uk minimum period is 2 years.
6. **Remote Lock:** Check this option if registrar locking for TLD is supported.
7. **Enabled for Commission Reseller(s):** Check box.

Once you click the **Next** button you will be present with series of forms to configure your product.

Payment Cycles: This form lets you select Payment Cycles for the TLD. You must select at least one payment cycle and payment group.

Select the payment cycle and click right arrow button to move it to **Selected Cycles** list.

Select the payment group and click right arrow button to move it to **Selected Payment Groups** list.

Payment Groups: This form lets you set prices for the Payment Cycles and Payment Groups you have selected in the previous step. Here you may set:

a. Setup Price
b. Price
c. Discount
d. Renewal Price
e. Transfer Price

Enter prices in each box.

Associate Addon: This form lets you associate addon with your domain name. Your client may buy these addon using online store or order them through their customer control center.

Click **Finish** button to complete product setup.

Web Hosting Plan Overview

Orchestration Module for Web Hosting offers extremely powerful and flexible hosting plan wizard. Control Panel Supports web/shared hosting plans provisioning on supported providers. Currently following provider is supported:

1. Hostmatic Control Server
2. Plesk Server

Hosting Plans are created through powerful Service Plan Wizard. To create a hosting plan, navigate to following path:

There are separate tabs for reseller products listing, customer product listing and add-ons management.

 Navigation: Home » Service Plans » Hosting Products

There are three tabs:

1. [Reseller Product Listing](#)
2. [Customer Product Listing](#)
3. Add-ons Management

The list of Web Hosting plans displays the following:

1. **Status:** If plan is available for sale the status will be *Active*.
2. **ID:** It is the product ID.
3. **Products Name:** This is the WebHosting package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
    i. **Clone:** To clone a product select clone from options.
    ii. **Edit:** Click to edit.
    iii. **Deactivate:** You can also deactivate a product.
    iv. **Remove:** To remove a product select remove option.

Exchange Hosting Products Overview

Orchestration Module for Microsoft Exchange offers extremely powerful and flexible email hosting plan wizard. Using Service Plan Wizard you can easily create hosted email plans and sell them via Offline order form or integrated store-front.

To view the hosted email plans:

> 🔍 **Navigation: Home » Service Plans » Exchange**

There are three tabs:

1. Reseller Product Listing
2. Customer Product Listing
3. Add-ons Management

The list of hosted email plans displays the following:

1. **Status:** If plan is available for sale the status will be *Active*.
2. **ID:** It is the product ID.
3. **Products Name:** This is the hosted Exchange package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
    i. **Clone:** To clone a product select clone from options.
    ii. **Edit:** Click to edit.
    iii. **Deactivate:** You can also deactivate a product.
    iv. **Remove:** To remove a product select remove option.

Hosted SharePoint Service Plans Overview

Orchestration Module for Microsoft SharePoint offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you may easily create hosted SharePoint plans and sell them via Off-line order form or integrated store-front.

To view the hosted SharePoint plans:

Navigation: Home » Service Plans » SharePoint

There are three tabs:

1. Reseller Product Listing
2. Customer Product Listing
3. Add-ons Management

To add a new Product Click **Add New Product** button.

The list of hosted SharePoint plans displays the following:

1. **Status:** If plan is available for sale the status will be *Active*.
2. **ID:** It is the product ID.
3. **Products Name:** This is the hosted SharePoint package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
    i. **Clone:** To clone a product select clone from options.
    ii. **Edit:** Click to edit.
    iii. **Deactivate:** You can also deactivate a product.
    iv. **Remove:** To remove a product select remove option.

Hosted CRM Service Plans Overview

Orchestration Module for Microsoft CRM offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you may easily create hosted CRM plans and sell them via Off-line order form or integrated store-front.

To view the hosted CRM plans:

> **Navigation: Home » Service Plans » CRM**

There are three tabs:

1. Reseller Product Listing
2. Customer Product Listing
3. Add-ons Management

The list of hosted CRM plans displays the following:

1. **Status:** If plan is available for sale the status will be *Active*.
2. **ID:** It is the product ID.
3. **Products Name:** This is the hosted CRM package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
    i. **Clone:** To clone a product select clone from options.
    ii. **Edit:** Click to edit.
    iii. **Deactivate:** You can also deactivate a product.
    iv. **Remove:** To remove a product select remove option.

Hosted Skype4B Plans Overview

Orchestration Module for Microsoft Skype for Business offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you can easily create hosted Skype4B plans and sell them via Offline order form or integrated store-front.

To view the hosted Skype for Business plans:

> 🔍 **Navigation: Home » Service Plans » Skype4B**

There are three tabs:

1. Reseller Product Listing
2. Customer Product Listing
3. Add-ons Management

The list of hosted Skype for Business plan displays the following:

1. **Status:** If plan is available for sale the status will be *Active*.
2. **ID:** It is the product ID.
3. **Products Name:** This is the hosted Skype4B package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
    i. **Clone:** To clone a product select clone from options.
    ii. **Edit:** Click to edit.
    iii. **Deactivate:** You can also deactivate a product.
    iv. **Remove:** To remove a product select remove option.

Miscellaneous Products

Miscellaneous Product support feature allows you to add non hosting product which you only want to track for billing purposes. It can be any service or product which your company is offering to its clients. You will be able to take orders and do billing, provisioning would be manual.

To view/manage miscellaneous products navigate to the following path:

> **Navigation: Home » Service Plans » Miscellaneous Products**
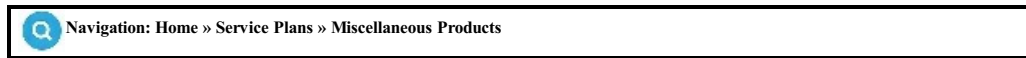
Note: You can also edit existing miscellaneous products plans by clicking on the **Edit** link.

It includes following:

1. Customer Product Listing
2. Add-ons Management

Click on **Add New Product** button. When the page loads, you will see the following settings.

1. **Product Type: Misc. Product** from the drop-down list is selected.
2. **Product Name:** Enter the name of your product.
3. **Category Name:** Provide the category of misc. Product.
4. **Is Active:** Select No if you want to disable this product selling.
5. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
6. **Associate Addon:** You may want to associate addon with this product. Your choices are:
   a. Optional
   b. Required
   c. Suppressed
7. **Date:** This is date set by the system (not editable).
8. **Enabled For Commission Reseller(s):** If you check this option the Customer Product Plan will be enabled for Commission type Resellers. (Visible only if Commission Type Reseller option is enabled in Built-in Module.)
   i. All Resellers
   ii. Select Resellers
9. **Process this product automatically:** If checked, the misc product will be run automatically and you will not have to Run manually from Service Queue. Recommended for product that does not involve any manual setup.
10. **Product Comments:** Enter any comments you to associate with this product. These comments show up on the store-front when this product is selected.

Once you click the **Next** button you will be presented with series of forms to configure your product.

In **Step-2** you will set the following:

Payment Cycles: This form lets you select Payment Cycles for the plan. You must select at least one payment cycle and payment group.

Select the payment cycle and click right arrow button to move it to **Selected Cycles** list.

Select the payment group and click right arrow button to move it to **Selected Payment Groups** list.

Payment Groups: This form lets you set prices for the Payment Cycles and Payment Groups you have selected in the previous step. Here you may set:

a. Setup Price
b. Price
c. Discount

Enter prices in each box.

Possible Product Upgrade / Downgrade: Here you may configure the upgrade and downgrade behavior of this product. When a product is purchased, your client may perform upgrade/downgrade from their control center without your involvement.

Associate Addon: This form lets you associate addon with your hosting plan. Your client may buy these addon using online store or order them through their customer control center.

Click on **Finish** button to complete product setup.

Hosted VPS Plans Overview

Orchestration Module for Microsoft Hyper-V offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you can easily create hosted email plans and sell them via Offline order form or integrated store-front.

To view the VPS hosting plans:

> **Q** Navigation: Home » Service Plans » Virtual Machines Hosting

There are three tabs:

1. Reseller Product Listing
2. Customer Product Listing
3. Add-ons Management

The list of Virtual Machines Hosting plan displays the following:

1. **Status:** If plan is available for sale the status will be *Active*.
2. **ID:** It is the product ID.
3. **Products Name:** This is the hosted VPS package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
   - i. **Clone:** To clone a product select clone from options.
   - ii. **Edit:** Click to edit.
   - iii. **Deactivate:** You can also deactivate a product.
   - iv. **Remove:** To remove a product select remove option.

Microsoft CSP Plan Overview

Orchestration Module for Microsoft CSP offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you can easily create hosted email plans and sell them via Offline order form or integrated store-front.

To view the Microsoft CSP plans:

There are three tabs:

1. Reseller Product Listing
2. Customer Product Listing
3. Add-ons Management

You can also **Export** and **Import** CSP packages Offers prices. Select CSV file to import offers prices. Click **Update Prices** when done.

The list of Microsoft CSP plans displays the following:

1. **Status:** If plan is available for sale the status will be *Active*.
2. **ID:** It is the product ID.
3. **Products Name:** This is the Microsoft CSP package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
    i. **Clone:** To clone a product select clone from options.
    ii. **Edit:** Click to edit.
    iii. **Deactivate:** You can also deactivate a product.
    iv. **Show Offers:** It shows the offer a particular plan has.
    v. **Commercial Saas Products:** It shows products fro NCE.
    vi. **Remove:** To remove a product select remove option.

Active Directory Plan Overview

Active Directory Management offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you can easily create hosted email plans and sell them via Offline order form or integrated store-front.

To view the Active Directory plans:

There are three tabs:

1. Reseller Product Listing
2. Customer Product Listing
3. Add-ons Management

The list of active directory plans displays the following:

1. **Status:** If plan is available for sale the status will be *Active*.
2. **ID:** It is the product ID.
3. **Products Name:** This is the Active Directory package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
    i. **Clone:** To clone a product select clone from options.
    ii. **Edit:** Click to edit.
    iii. **Deactivate:** You can also deactivate a product.
    iv. **Remove:** To remove a product select remove option.

DigiCert SSL Plan Management

DigiCert SSL Plans are created through powerful Service Plan Wizard. It includes following:

1. [Reseller Product Listing](#)
2. [Customer Product Listing](#)

To create a DigiCert SSL plan, navigate to following path:

Navigation: Home » Service Plans » DigiCert SSL

Note: You can also edit existing SSL plans by clicking the **Edit** link at desired plan that you want to modify.

Click **Add New Product** button. When the page loads, you will see the following settings.

1. **SSL Provider:** Select **DigiCert SSL** from the drop-down list.
2. **Product Name:** Enter the name of your product.
3. **Is Active:** Select No if you want to disable this product selling.
4. **Allow Prorate**: Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
5. **Product Comments:** Enter any comments you want to associate with this product. These comments show up on the store-front when this product is selected.

Once you click the **Next** button you will be present with series of forms to configure your product.

Price Group: This form lets you set prices for the Payment Cycles and Payment Groups you have selected in the previous step. Here you may set:

a. Setup Price
b. Price
c. Discount

Enter prices in each box.

Payment Cycles: This form lets you select Payment Cycles for the plan. You must select at least one payment cycle and payment group.

Select the payment cycle and click right arrow button to move it to **Selected Cycles** list.

Select the payment group and click right arrow button to move it to **Selected Payment Groups**list.

Click **Finish** button to complete product setup.

Work Folder Hosting Plan Overview

Orchestration Module for Windows Work Folders offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you can easily create hosted work folder plans and sell them via Offline order form or integrated store-front.

To view work folder hosting plans:

There are three tabs:

1. Reseller Product Listing
2. Customer Product Listing
3. Add-ons Management

The list of work folder hosting plans displays the following:

1. **Status:** If plan is available for sale the status will be *Active*.
2. **ID:** It is the product ID.
3. **Products Name:** This is the work folder hosting package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
    i. **Clone:** To clone a product select clone from options.
    ii. **Edit:** Click to edit.
    iii. **Deactivate:** You can also deactivate a product.
    iv. **Remove:** To remove a product select remove option.

RDS Hosting Plan Overview

Orchestration Module for RDS offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you can easily create hosted RDS plans and sell them via Offline order form or integrated store-front.

To view RDS hosting plans:

There are three tabs:

1. Reseller Product Listing
2. Customer Product Listing
3. Add-ons Management

The list of RDS hosting plans displays the following:

1. **Status:** If plan is available for sale the status will be *Active*.
2. **ID:** It is the product ID.
3. **Products Name:** This is the RDS hosting package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
    i. **Clone:** To clone a product select clone from options.
    ii. **Edit:** Click to edit.
    iii. **Deactivate:** You can also deactivate a product.
    iv. **Remove:** To remove a product select remove option.

Import Organization

You can migrate existing Active directory organizations to Control Panel using Organization Import Wizard.

Organization Import wizard makes it easy to bulk import AD organizations. To import organization navigate to following path:

Pre-requisites:

1. The customer account should be present.
2. UPN Suffix must be set for the organizations

Import settings

In **Step-1**, provide import settings:

1. **Company Name [Owner]:** Select Owner, it could be provider or a reseller
2. **Active Directory:** Select Active directory domain
3. **LDAP URL:** Provide LDAP path where organization exists.
4. **Organization Import batch limit:** Provide total number of domains which can be imported in one batch.

Click Next.

Select Organizations

In **Step-2**, select organizations:

1. **Import:** Tick means yes.
2. **Organization:** The organizations that are available will be displayed. Provide domain name.
3. **Name:** Provide name of organization.
4. **For Client:** Select the client from the drop down list.

Click **Finish** when done.

Domain Import Wizard

To import domains using domain import wizard navigate to following path:

Under **Import settings** provide following:

1. **Company Name [Owner]:** Select Company name or owner.
2. **Customer:** Select customer.
3. **Domain Registrar:** Select domain registrar.
4. **Payment Group:** Select payment group/currency.
5. **Import batch limit:** Provide total number of domains which can be imported in one batch.

Click **Import** when done.

Exchange Migration

You can migrate existing organizations, mailboxes, contact lists and distribution lists etc. from Exchange 2019 and it legacy versions to Control Panel using Exchange Migration Toolkit.

Control panel migration utility is used for importing already existing mailboxes from Exchange Server into control panel. For example, there is a company fabricam.com which is already using their exchange solution and they want to manage their exchange functionality from control panel.

Exchange migration wizard makes it easy to bulk import and create Exchange based hosted organizations.

To import exchange organization navigate to following path:

> **Navigation: Home » Import Utilities » Exchange**

License Requirement: Please note that Migration Toolkit license is required to use this wizard.

Pre-requisites:

1. At least one Exchange Service Plan should be created.
2. The customer account should be present.

Post-Migration Tasks:

Verify and fix resources allocated to customer and reseller(Owner) according to actual usage.

Import Settings

In **Step-1**, provide import settings:

1. **Select Owner:** Select owner/provider from the drop down list.
2. **Select Exchange Server:** Select Exchange mailbox server from the drop down list.

Select Organizations

In **Step-2**, select organizations to import

1. **Import:** Tick means yes.
2. **Organization:** The organizations that are available will be displayed. Provide domain name.
3. **For Client:** Select the client from the drop down list.
4. **Associate Service Plan:** Select the service plan from drop down list. This service plan will be sold to customer during import/migration process.
5. **Options:** If you want to import click **import** link. This will take you to Step 3.

Billing Information

In **Step-3** you are required to give the billing information:

1. **Organization:** Name of the organization.
2. **Client:** Name of the client.
3. **Billing Cycle:** Select billing cycle from the drop down list.
4. **Payment Group:** Select the payment group from the list.

Then click on **Finish** button.

Note: Please be patient after clicking finish button as the process may take time

Import CSP Tenants

You can migrate existing CSP tenants to Control Panel using CSP Tenants Import Wizard.

CSP Tenant import wizard makes it easy to bulk import office 365 tenants, Users, Licenses and roles. To import CSP tenants navigate to following path:

Navigation: Home » Import Utilities » Microsoft CSP

Pre-requisites:

1. At least one CSP Service Plan should be created.
2. When owner other than provider is selected then reseller shall be already subscribed to the Offers/Subscriptions of associated tenant being imported.
3. Selected CSP service plan shall contain all the Offers/Subscriptions of associated tenant being imported.
4. It is recommended to not select more than 10 tenants in a single batch when importing as this is a time consuming process and may encounter catastrophic problems.

Import settings

In **Step-1**, provide import settings:

1. **Company Name [Owner]:** Select Owner, it could be provider or a reseller
2. **Select CSP Profile:** Select CSP profile.
3. **Select Package:** Select CSP Product in which required Offers/Addons are selected.
4. **Tenant import batch limit:** Provide batch limit 10 to 99.
   [Note: Setting higher limit for tenant import batch will result in lower page response and in some cases deadlock.]

Click **Next**.

Select Organizations

In **Step-2**, Select the tenants you wish to import and associate them with the customer and service plan.

1. **Tenant** Tick means yes.
2. **Service Account Credentials:** Provide Global Admin User credentials.
   i. In bulk import if **Manage tenant using panel** is 'ON' then user name and password inputs are optional.
   ii. In bulk import if **Manage tenant using panel** is 'OFF' then user name and password inputs and hidden/removed.
3. **For Customer:** Select the client from the drop down list.
4. **Subscription start Date:** Select date.
5. **Import Inactive Subscriptions:** Import Tenant without licenses (Trial) is possible. Check "Import Inactive Subscriptions"

After selecting customer and tenant click "Import".

SharePoint Migration

You can migrate existing organizations/portals, users etc. from SharePoint 3.0 to SharePoint 2019, to Control Panel using SharePoint Migration Toolkit. Control panel migration utility is used for importing already existing organizations / portals from SharePoint 2019 and its legacy versions into control panel. For example, there is a company fabricam.com which is already using their SharePoint and they want to manage their SharePoint functionality from control panel.

SharePoint migration wizard makes it easy to bulk import SharePoint based hosted organizations. To import SharePoint portals navigate to following path:

> **Navigation: Home » Import Utilities » SharePoint**

License Requirement: Please note that Migration Toolkit license is required to use this wizard.

Pre-requisites:

1. At least one SharePoint Service Plan should be created.
2. The customer account should be present.

Post-migration tasks:

Verify and fix resources allocated to customer and reseller (Owner) according to actual usage.

Import Settings

In **Step-1** you have to set the following import settings:

1. **Select Owner:** Select from the drop down list.
2. **Select SharePoint Server:** Select SharePoint server from the drop down list.

Click **Next**.

Select Organizations

In **Step-2**, select organization to import.

1. **Import:** Tick means yes.
2. **Organization:** The organization available will be displayed
3. **For Client:** Select the client from the drop down list.
4. **Associate Service Plan:** Select the service plan from drop down list. This service plan will be sold to customer during import/migration process.
5. **Options:** If you want to import click **import** link. This will take you to Step 3.

Billing Information

In **Step-3** you are required to give the billing information:

1. **Organization:** Name of the Portal.
2. **Client:** Name of the client.
3. **Billing Cycle:** Select billing cycle from the drop down list.
4. **Payment Group:** Select the payment group from the list.

Then click on **Finish** button.

Note: Please be patient after clicking finish button as the process may take time.

CRM Migration

You can migrate existing organizations, users etc. from CRM 4.0 to CRM 2016 setup, to Control Panel using CRM Migration Toolkit. Control panel migration utility is used for importing already existing organizations from CRM 2016 into control panel. For example, there is a company fabricam.com which is already using their CRM and they want to manage their CRM functionality from control panel.

CRM migration wizard makes it easy to bulk import CRM based hosted organizations. To import CRM organizations navigate to following path:

Navigation: Home » Import Utilities » CRM

License Requirement: Please note that Migration Toolkit license is required to use this wizard.

Pre-requisites:

1. At least one CRM Service Plan should be created.
2. The customer account should be present.

Post-migration tasks:

Verify and fix resources allocated to customer and reseller(Owner) according to actual usage.

Import Settings

In **Step-1**, provide import settings:

1. **Select Owner:** Select from the drop down list.
2. **Select CRM Server:** Select CRM server from the drop down list.

Click **Next**.

Select Organizations

In **Step-2** select organizations:

1. **Import:** Tick means yes.
2. **Organization:** The organization available will be displayed
3. **For Client:** Select the client from the drop down list.
4. **Associate Service Plan:** Select the service plan from drop down list. This service plan will be sold to customer during import/migration process.
5. **Options:** If you want to import click **import** link. This will take you to Step 3.

Billing Information

In **Step-3** you are required to give the billing information:

1. **Organization:** Name of the organization.
2. **Client:** Name of the client.
3. **Billing Cycle:** Select billing cycle from the drop down list.
4. **Payment Group:** Select the payment group from the list.

Then click on **Finish** button.

Note: Please be patient after clicking finish button as the process may take time

Skype for Business (Lync) Migration

You can migrate existing organizations, users etc. from Microsoft Skype for Business 2019 and for its legacy versions, to Control Panel using Skype for Business Migration Toolkit. Control panel migration utility is used for importing already existing organizations for Microsoft Lync 2010, 2013 and Skype for Business 2019 into control panel. For example, there is a company fabricam.com which is already using their Skype for Business and they want to manage their Skype for Business functionality from control panel.

Skype for Business migration wizard makes it easy to bulk import Skype for Business hosted organizations. It supports Lync 2010, 2013/Multitenant & Skype for Business 2019.

To import Skype for Business organizations, navigate to following path:
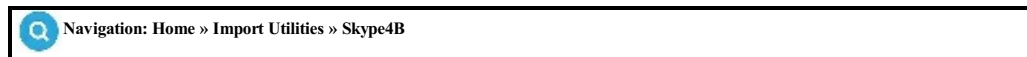
> **Navigation: Home » Import Utilities » Skype4B**

License Requirement: Please note that Migration Toolkit license is required to use this wizard.

Pre-requisites:

1. At least one Skype for Business Service Plan should be created.
2. The customer account should be present.
3. Names of Federated Domains at server should start with organization name and a "-". e.g. "OrgName-"
4. Names of chat categories, chat rooms, response groups and queues should start with organization name and a "-". e.g. "OrgName-"
5. FQDN of Persistent Chat Server is required for chat categories & chat rooms.
6. FQDN of Application Server is required for response groups and queues.

Post-migration tasks:

Verify and fix resources allocated to customer and reseller(Owner) according to actual usage.

Import Settings

In the **Step-1,** you have to set the following import settings:

1. **Select Owner:** Select owner from the drop down list.
2. **Select Skype for Business Server:** Select Skype for Business server from the drop down list.
3. **LDAP URL:** Provide LDAP URL for import.

Select Organizations

In **Step-2,** Select Organizations:

1. **Import:** Tick means yes.
2. **Organization:** The organization available will be displayed
3. **For Client:** Select the client from the drop down list.
4. **Associate Service Plan:** Select the service plan from drop down list. This service plan will be sold to customer during import/migration process.
5. **Options:** If you want to import click **import** link. This will take you to Step 3.

Billing Information

In **Step-3,** you are required to give the billing information:

1. **Organization:** Name of the Portal.
2. **Client:** Name of the client.
3. **Billing Cycle:** Select billing cycle from the drop down list.
4. **Payment Group:** Select the payment group from the list.

Then click on **Finish** button.

Note: Please be patient after clicking finish button as the process may take time.

Hosted VPS Import

You can migrate existing virtual Machines from VPS Server to Control Panel which do not exists in Panel. Control panel migration utility is used for importing already existing organizations from Microsoft HyperV Server 2019 and its legacy versions into control panel.

Virtual Machine Import wizard makes it easy to bulk import VM's. To Import VMs, navigate to following path:

> 🔍 **Navigation: Home » Import Utilities » Virtual Machine**

License Requirement: Please note that Migration Toolkit license is required to use this wizard.

Pre-requisites:

1. At least one VM Service Plan should be created.
2. The customer account should be present

Post-migration tasks:

Verify and fix resources allocated to customer and reseller(Owner) according to actual usage.

Import Settings

In the **Step-1,** you have to set the following import settings:

1. **Select Owner:** Select owner from the drop down list.
2. **Select Server:** Select Hyper-V server from the drop down list.

Select Organizations

In **Step-2,** Select Organizations:

1. **Import:** Tick means yes.
2. **Organization:** The organization available will be displayed
3. **For Client:** Select the client from the drop down list.
4. **Associate Service Plan:** Select the service plan from drop down list. This service plan will be sold to customer during import/migration process.
5. **Options:** If you want to import click **import** link. This will take you to Step 3.

Subscription Information

In **Step-3,** you are required to give the billing information:

1. **Virtual Machine Name:** Name of the Portal.
2. **Client:** Name of the client.
3. **Billing Cycle:** Select billing cycle from the drop down list.
4. **Payment Group:** Select the payment group from the list.
5. Settings: Click **NIC settings** to adjust NIC settings.

Then click on **Finish** button.

Note: Please be patient after clicking finish button as the process may take time.

WHMCS Import Wizard

To view/manage WHMCS import navigate to the following path:

You can also disable **Skip Exchange Organization Creation for import.**

You can use following options to **Filter** Import settings:

1. Subsc.ID
2. Customer ID
3. Customer Name
4. Domain Name
5. Package
6. Service Type

Click on **Search**.

Customers

Under **Customers** tab, provide WHMCS User.Id.

1. **Status:** It shows status of Customer.
2. **Customer:** It shows the name of customer along with customer ID.
3. **WHMCS User.Id:** Provide WHMCS User.Id.

Click on **Save** button.

Susbscription List

Under **Subscriptions List** tab, You have to provide WHMCS User.Id against customer and WHMCS ID against subscription.

1. **Status:** It shows status of Customer.
2. **Customer:** It shows the name of customer along with customer ID.
3. **WHMCS User Id:** Provide WHMCS User.Id.
4. **Subscription Name:** It shows the subscription.
5. **Package:** It display package in use.
6. **Subscription ID:** It shows subscription ID.
7. **WHMCS Id:** Provide WHMCS Id.

Click on **Save** button when done.

3rd Party Import

This import wizard makes it easy to import Exchange subscriptions from selected control panel. Also using bulk operations you can subscribe all resellers for SharePoint and Skype4B and create End Customer plans under reseller.

To Import organizations, navigate to following path:

Pre-requisites:

1. At least one Reseller Exchange Service Plan should be created in Panel for Subscription Reseller.
2. At least one Customer Exchange Service Plan should be created in Panel.
3. At least one Reseller Skype4B Service Plan should be created in Panel.
4. At least one Customer Skype4B Service Plan should be created in Panel.
5. At least one Skype4B Addon should be created in Panel.
6. At least one Reseller SharePoint Service Plan should be created in Panel.
7. At least one Customer SharePoint Service Plan should be created in Panel.

Post-import tasks:

Verify and fix resources allocated to customer and reseller(Owner) according to actual usage.

Import Settings:

You have to provide following for Exchange import under Import Settings:

1. Select 3rd party Control panel option allows you to choose which control panel you are importing data from. Choose your source control panel name from the available options.
2. **Import As option** Lets you choose which type of reseller to create in Control Panel. Any reseller you have in the source control panel will be picked up and then created as the chosen reseller type.
   a. **Subscription based reseller** is a stand-alone reseller in Control Panel that does not inherit business logic/prices/plans from the provider. This type of reseller has its own service plans. This reseller purchases a bulk quantity from provider (any number of resources or even unlimited resources), then creates his own service plans, and sells the services on his own terms and conditions, business logic and pricing. This is a little complex to set up compared to Commission based reseller but has advantage of being able to offer services of his choice and on his own terms.
   b. **Commission based reseller** is a subsidized reseller in Control Panel that inherits business logic/service plans and pricing set by the provider. This type of reseller does not have the ability to create his own service plans or pricing. This type of reseller uses and sells existing service plans offered by the provider and earns commission while selling services to his own customers. The services maintain same naming, business logic, pricing conventions as set by the provider. This type of reseller is easy to set up and maintain as compared to Subscription based reseller but has the disadvantage of being unable to offer services of his own choice, terms or pricing.

After selecting 3rd party panel and **Import As** option you have to provide following:

1. **Control Panel Database Connection string:** Provide Connection String of the source Control Panel Database. This is connection string of your "MSPControl", "WebSitePanel" , "Hosting Controller" or "CloudBlue" database.
2. **Reseller Exchange service plan:** Select Reseller's Exchange service plan which should be assigned to all your resellers selected during import. After import this plan will be assigned as subscription to the selected resellers in Control Panel.
3. **Customer Exchange service plan:** Select Customer's Exchange service plan which should be assigned to all your end customers selected during import. After import this plan will be assigned as subscription to the selected customers in Control Panel.
4. **Select Exchange Server:** Select Exchange Server that you want to assign to selected resellers / customers. As a result, once the import is complete new mailboxes will be created on the selected server.
5. **LDAP URL:** Provide LDAP URL. This is the source LDAP URL that contains the organization Units for each of your organizations. This is mostly the default LDAP URL of your current panel where all sub OUs are created for each organization.

6. Now Click the **Get resellers** option to see list of all available reseller that can be imported.
7. **Select resellers to import:** Select Resellers from the List and Click Import button. To multi-select press **SHIFT** or **CTRL** key and select ALL in sequence or select required resellers one by one respectively.
8. **Comma seperated CustomerIds to Import:** Provide customer Id(s) which are required to import in Panel.

Click **Import**.

Bulk Operations

You have to select following for Skype for Business (Lync) and then Click Create and Subscribe Lync Plans for All Resellers

1. Select Lync Reseller Package
2. Select Lync Customer Package
3. Select Lync Reseller AddOn
4. Select Lync Customer AddOn

For SharePoint select following and Click Create and Subscribe for SharePoint Plans for All Resellers

1. Select SharePoint Reseller Package
2. Select SharePoint Customer Package

Import DNS Zones

To import DNS zones navigate to following path:

It shows following:

1. **Select server:** Select server
2. **Owner:** Select owner of customer.
3. **Customer:** Select customer

Click **Get DNS Zones.**

You will able to see list of available zones. In this step you need to specify following for zones to be imported.

1. **Domain Name:** It shows the domain name you need to select domains
2. **Select Customer:** Select Customer
3. **Associate Service Plan:** Select service plan.
4. **Subscription Start Date:** It shows subscription start date.
5. **Billing cycle:** It shows billing cycle.
6. **Payment Group:** It shows currency.

Click **Save** when done.

For already existing "DNS Only subscriptions" navigate to the following path:

Select **DNS Only Subscriptions** tab. Click **Manage** in front of DNS Only Subscription.

Under **DNS Zones** tab, click **Import DNS Zone.**

System Configuration Overview

The System Configuration Module allows you to customize and manage various settings related to your modules, providers, and the personalization of your control panel. Below is a brief overview of the settings you can configure within this module:

1. **Company Profile and Policies:** Set up your company profile, define your organizational culture, configure API settings, and establish terms and conditions.
2. **Control Panel Personalization:** Customize the control panel with your company's branding, including logos and background images.
3. **Module Management:** Choose which modules to display, such as Billing, Helpdesk, WHMCS, etc.
4. **Reseller Configuration:** Define and manage different types of resellers.
5. **Alerts and Notifications:** Set up panel alerts and notifications to keep your team informed.
6. **Authentication/Security Settings:** Configure third-party logins (e.g., Azure) and enable two-factor authentication for added security.
7. **Billing and Payments:** Manage billing settings, currency configurations, payment processing, and invoice handling.
8. **Email Configuration:** Set up email delivery settings and customize email templates.
9. **Provider Management:** Configure various providers to suit your business needs.
10. **E-commerce Store Setup:** Set up and manage your online store.
11. **MailChimp Integration:** Integrate and manage your MailChimp settings for marketing campaigns.
12. **Staff Management:** Define and manage staff user accounts.
13. **License Management:** Manage software licenses efficiently.
14. **Logging Configuration:** Set up and manage system logging for tracking and auditing purposes.

Company Profile Settings

Company profile settings are used in all the documents where company information is displayed. For example, Invoice document, Payment document, customer control center etc.

To change/update company profile navigate to following path:

Navigation: Home » System Configuration » Company Profile

There are five tabs which are displayed in company profile section:

1. Company Profile Tab
2. Culture Tab
3. Personalization Tab
4. API Settings Tab
5. Terms & Conditions Tab
6. Skins

Company Profile

To edit company profile settings navigate to the following path:

Company Profile

1. **Company name:** Provide company name.
2. **URL:** Provide URL.
3. **Address:** Provide address.
4. **City:** Provide the name of city.
5. **State:** Provide the name of state.
6. **Zip:** Provide zip code.
7. **Country:** Provide country name.
8. **Phone:** Provide phone number.
9. **Billing phone:** Provide billing phone number.
10. **Sales phone:** Provide sales phone number.
11. **Support phone:** Provide support phone number.
12. **Billing Email:** Provide billing email.
13. **Sales Email:** Provide sales email.
14. **Support Email:** Provide support email.
15. **Billing Signature:** Provide billing signature.
16. **Sales Signature:** Provide sales signature.
17. **Support Signature:** Provide support signature.
18. **Append disclaimer in emails:** Selecting this option will append disclaimer in emails.
19. **Company's default mailbox template:** You can set default Mailbox template for a company.

Enter the necessary information in the fields and click the **Save** button.

Culture

To edit company profile settings navigate to the following path:

Select **Culture** tab:

Locale: Select locale from the drop down list.

Only enabled languages can be set as default. It shows the following listing:

1. **Name:** It displays the name of the language.
2. **Available/Enabled:** It shows the enabled languages.
3. **Set As Default:** You can set the language as default.

Languages that can be set as default are English (United States), Spanish (Uruguay), Dutch, Portuguese, and German etc..

Select **Culture** tab:

Personalization

To edit company profile settings navigate to the following path:

Select **Personalization** tab. It shows the following fields under *Personalization* section:

1. **Control panel brand name:** Provide control panel brand name.
2. **Company name:** Provide company name.
3. **Company website URL:** Provide company website URL.
4. **Control panel logo:** You can either provide log URL or upload logo. Select logo of size. 400px x 45px
5. **Login Background Image:** You can either provide image URL or Upload image.
6. **Favicon: (16px x 16px):** You can either provide favicon URL or Upload favicon.
7. **Copyright text:** Provide copy right text and year.
8. **Send Application crash report to:** Provide email address.
9. **Customer settings:** Check below options
   - Check option if you want remove customer and reseller after cancelling from service queue.
   - Check if you want to display customer number.
10. **Customer Number Title:** Provide customer number.
11. **Url to purchase more resources when quota limit is reached:** You can provide URL to your store products/Add-on to buy more resources. **Note:** Three query string variables will be appended when a link for more resources is generated. these will be 1: SvcTypeId, 2: SubsId, 3: CustId. You can use these variables on your provided link. See More on [Purchase more resources](#)
12. **Send email checkbox checked**: Select option to send email.
13. **Hide login as end user option from login page:** Select checkbox to hide option for end user (4rth level Active Directory user) to login to control panel.

Click **Save** when done.

API Settings

To edit company profile settings navigate to the following path:
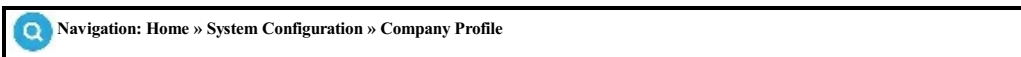
Select **API Settings** tab, it shows the following fields under *API information* section:

1. **API Login:** Provide API login.
2. **API Password:** Provide API password.
3. **Allowed IP addresses:** Provide IP addresses in comma separated way. i.e:10.1.1.1, 10.1.1.2, 10.1.1.3]
4. **Status:** Select enabled or disabled from the drop down list.
5. **WHMCS Module:** Check this option for WHMCS.
6. **Encryption Key:** Generate Key. [Note:This key will be used to encrypt/decrypt data that is transmitted between panel and WHMCS via browser as hidden fields or in the url. This key shall be provided in WHMCS integration handler file]
7. **Security Code:** Generate code [Note:This security code will be used to validate the auto login authentication from WHMCS into Panel. This Code shall be provided in WHMCS integration handler file]

Click on **Save** button when done.

Terms & Conditions for Control panel

To change/update terms and conditions for company profile navigate to following path:

**Navigation: Home » System Configuration » Company Profile**

Select **Term & Conditions** tab:

1. You can **Set As Default** one Term & condition.
2. **Name:** Provide friendly name. Example: Support Policy
3. **Web URL:** Provide URL for terms. Example: http://domain.com/terms.htm
4. **Language:** Select language.

Click **Add More Terms** to add more.

Skins

To customize control panel skin navigate to following path:

Navigation: Home » System Configuration » Company Profile
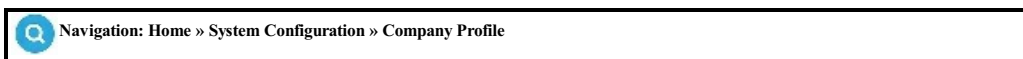
Select **Skins** tab. To add a custom skin click **Add Custom Skin** and provide following:

1. **Name:** Provide skin name.
2. **Select Skin Color:** Choose skin color
3. **Select Font Color:** Choose font color
4. **Select Sidebar/Breadcrumb Background Color:** Choose side bar/breadcrumb background color.
5. **Select Wizard Active Link Color:** Choose wizard active link color
6. **Select Button Background Color:** Choose button background color
7. **Select Nav Pills Background Color:** Choose nav pills background color
8. **Select Breadcrumb Span Color:** Choose breadcrumb background color
9. **Select Border Color Of Label After Checkbox And Before/After Radio:** Select color
10. **Select Border Right And Border Bottom Color Of Label Before Checkbox:** Select color
11. **Select Anchor Color Of Content Not Disabled:** Select color
12. **Select Background Color Of Table Striped/Store Header:** Select color
13. **Select Border Bottom Color Of Expandable Item:** Select color
14. **Select Background Color Of Label Count:** Select color
15. **Set as Default:** Check box.

Click **Save** when done.

1. **Allow Resellers to change Skin Settings:** Check box.
2. **Allow Customers to set Skin:** Check box.
3. **Allow Employees to set Skin:** Check box.

You can also choose which skin is **Default** or **Is allowed**. Click **Save** when done.

BuiltIn Modules

To view Built-in Modules navigate to the following path:

Module Configuration Options

Cascade setting for all resellers: This option will change all companies settings according to provider settings.

Web Hosting	Microsoft Exchange	DNS Module	Microsoft SharePoint
Domain Name Product	Microsoft Dynamics CRM	SSL module	Microsoft Skype for Business
Billing module	Wireless Services	VPS Module	Help desk module
Dedicated server Hosting	Online Help	Data Center	Directory Services
WHMCS Module	Microsoft CSP	Misc. Products	Import Utilities
Mimecast	WorkFolders Hosting	RDS Hosting	

Check the desired modules to enable and click on **Update Configuration** button.

Menu Settings

To view/manage Menu settings navigate to the following path:

The two tabs are shown Provider/Reseller Menu and the Customer Menu:

1. Provider/Reseller Menu: Select Node
    - Custom Url Options
        i. **Node Selected:** Select the node under custom URL column.
        ii. **Node title:** Provide node title. You can also select language.
        iii. **Node url:** Provide node URL
        iv. **Node Icon:** Select Icon
        v. **Show on reseller:** Check it.
2. Customer Menu: Select Node
    - Custom Url Options
        i. **Node Selected:** Select the node under custom URL column.
        ii. **Node title:** Provide node title. You can also select language.
        iii. **Node url:** Provide node URL
        iv. **Node Icon:** Select Icon

Click **Add** when done.

Configure Alerts

To configure alerts, navigate to the following path:

Navigation: Home » System Configuration » Configure Alerts

Alerts are reminders that appear to notify you of new activity on your Control Panel account. They will appear on your Alerts icon on the top bar of the Control Panel UI near the name of the Provider/Customer name logged in.

Click on Alert icon to see all the alerts.

The alerts notification will appear for the following modules/section (if enabled):

1. Billing Manager
2. Help Desk Manager
3. Subscriptions
4. Customer Manager
5. Service Queue

3rd Party Authentication

Provider/Resellers/Customer/Staff users can authenticate using existing Azure account instead of Control Panel account. Also if customer/resellers have Azure or ADFS account, they can also authenticate using their Azure/ADFS account as well via control panel Login.

To enable 3rd Party authentication in control panel, navigate to the following path:

Navigation: Home » System Configuration » Authentication

Select **3rd Party Authentication** tab and provide following:

1. **Enable login using Microsoft account**: Select checkbox to enable
2. **Enable login using ADFS:** Select checkbox to enable
3. **Azure Web Application Id:** Provide Azure web application ID.
4. **ADFS Login App Url:** Provide url for ADFS login app.
5. **Signout from ADFS on panel signout:** Select checkbox to enable.

Click "**How to configure Azure Web Application?**" for more details:

1. Sign in to the Azure portal.
2. If your account gives you access to more than one, click your account in the top right corner, and set your portal session to the desired Azure AD tenant.
3. In the left-hand navigation pane, click the Azure Active Directory service, click App registrations, and click New application registration.
4. When the Create page appears, enter your application's registration information:
   a. **Name:** Enter a meaningful application name example PortalAuth
   b. **Application Type:** Select "Web app / API"
   c. **Sign-On URL:** Provide the base URL of panel. For example, https://cp.hosting.com
   d. Click **Create**
5. You are taken to the application's main registration page, which opens up the Settings page for the application.
6. Click Properties, a new window will open, at end of window set Multi-Tenanted to Yes, and click **Save**.
7. Click Required Permissions, then click Grant Permissions, and click Yes.
8. Click Reply URLs, add all white label urls for resellers and customers under Reply URLs and click Save.
9. Click X, on Settings page to close Settings.
10. Switch to the Edit manifest page, by clicking Manifest from the application's registration page. A web-based manifest editor opens, allowing you to Edit the manifest within the portal. Locate and set the "oauth2AllowImplicitFlow" value to "true." By default, it is set to "false."Click **Save**.
11. Copy Application Id and specify in Azure Web Application Id.

Click **Save Settings**.

Two Factor Authentication

To enable two factor authentication (2FA) with in control panel, navigate to the following path:

Select **Two Factor Authentication Settings** tab.

1. **Enabled:** Select checkbox to enable 2FA. Once check you have other options to enable by default for all new customers and update existing users as below
   a. Enabled by default for new customers/resellers/staff users
   b. Update existing users.

For 2FA Settings Authenticate Using following:

1. **Send PIN through Email:** Provide "**PIN expires in**" Minutes.
2. **Send PIN through SMS:** Select this option for SMS settings.
3. **Authenticator App:** Authenticator App is used to enable **Google Authentication** in Control Panel.
4. **Duo Authentication:** Select this option to enable Duo authentication.

Click **Save Settings**.

For **Update existing Users** you can select **No change**, **Enabled** and **Disabled** for following:

1. Provider Staff Users
2. Reseller's Staff Users
3. Provider Customers
4. Reseller's Customers
5. End (Active Directory) Users

Click **Save**.

Configure Google Authentication

To configure Google Authentication or 2FA Settings, navigate to following path:

Select **Two Factor Authentication** tab. Check **Enabled** check box and select **Authenticator App:**

Click **Save Settings**.

How Login Works?

1. 1st time login
   i. After password is verified
   ii. User is shown a QR code
   iii. User will scan QR code using any app, suggested apps are (Google Authenticator, Authy 2-Factor Authentication)
   iv. When QR code is scanned, user will get 6-digit auth code in application.
      a. **Warning:** Code changes in 30 seconds.
      b. 6-digit OTP Code in application
      c. In case user account is duplicated, then latest one will be valid.
   v. User will input code, if code is accepted user is logged in.
2. Returning user login
   i. Same as 1st time login but no need to scan QR code.
   ii. User just needs to enter code from his mobile app.
3. Reset Google Authenticator
   i. Needed in case user lost his device, or reinstalled app and does not have code available.
   ii. Click on **Reset Google Authenticator** link on Login screen of control panel.
   iii. Enter email address to get secret key on your registered email address.

SMS API Settings

To configure SMS API (twilio) with in control panel, navigate to the following path:

To configure SMS API click **Edit** and provide following details:

1. **Account SID:** Here provide the twilio Account SID.
2. **Auth Token:** Provide twilio account authentication token
3. **Number:** Provide your number.
4. **Twilio API URL:** Provide the Twilio API URL.

Click **Save settings** when done.

Now Select SMS Templates tab to configure SMS templates settings.

SMS Templates

To setup SMS template settings for either authentication (2FA) or forgot password with in control panel, navigate to the following path:

Navigation: Home » System Configuration » SMS Settings

To add a new SMS template click **Add Template**

1. **Template Name:** Provide template name.
2. **SMS Body:** Provide body of SMS.
3. **Insert Variable:** Select variable for SMS.
4. **Language:** Select language of the template.
5. **Purpose:** Select purpose for the SMS template i.e. 2FA or forgot password.

Click **Save** when done.

Add Custom Tile

To add Dashboard tiles, navigate to the following path:

Click **Add Custom Tile**.

1. **Name:** Provide name of tile.
2. **Icon Path:** Select Image URL or Upload Image
3. **URL:** Provide URL of custom tile.
4. **Show To Reseller:** Check box
5. **Show To Customer:** Check box
6. **Show To Staff:** Check box
7. **Show On 4th level:** Check box

Click **Save** when done.

Billing Preferences

Billing preferences are set of configurations that are supposed to be setup according to the underlying business scenarios because these settings totally depend on your business nature and customer relationship. Billing preferences involve various settings including invoice setting and payment queue.

1. General Billing
2. Invoice Settings
3. Payment Queue Settings
4. Advanced
5. Invoice Templates
6. Credit Card Types
7. CSP billing

General billing

To setup the billing configurations, navigate to the following path.

> 🔍 **Navigation: Home » System Configuration » Billing Configuration » General Billing**
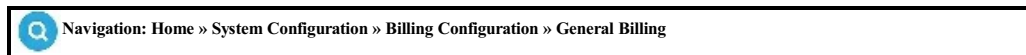
Click on the First tab, that is "**Billing Settings**" to configure billing settings. Here, you can **Enable/disable PCI compliance**, turn ON/OFF the billing system, Enable/Disable tax collection, the different document ID's to start from, Hide credit card interfaces and enable SEPA payment method etc.

1. **Day of month to bill:** Select the day of billing from the drop down list.
2. **Enable PCI Compliance:** Select this option to enable PCI compliance in control panel. If PCI Compliance enabled, credit card data will not be saved in local database, instead all payment profiles will be created on payment gateway.
3. **Disable prorate billing:** Prorated billing is a technique for applying standard billing methods to nonstandard billing periods. For example, if a bill for a service is usually invoiced monthly, prorating the bill allows the service provider to bill for an amount that reflects the portion of the month in which the service was used. Prorated billing can be applied to periods shorter or longer than the usual billing period. If you **disable prorated billing,** following will happen:
    a. The add-ons purchased with a subscription will be prorated with that subscription and a single invoice will contain one subscription and its Add-ons. This will only apply to subscriptions and add-ons having same billing cycle (Weekly, Monthly, Yearly etc).
    b. On the other hand, the subscriptions will be billed on the date it is purchased. Also, all the subscriptions purchased on the same day will be invoiced together.
4. **Disable price freeze:** You can disable price freeze option
5. **Set Pay later as default in offline order form:** You can set Pay later as default for billing in your offline order form.
6. **Disable tax collection:** You can disable tax option for your panel.
7. **Issue tax return on credits generated by system:** Check box.
8. **Balance sign meaning:**
    a. Positive balance means the customer owes money to the provider: When this option is selected, the positive balances shown in statements are owed by customer.
        i. Balance without brackets (customer owes money to provider)
        ii. Balance with brackets (provider owes money to customer)
    b. Negative balance means the customer owes money to the provider: When we select this option, the negative balances shown in statements are owed by customer.
        i. Balance with brackets (customer owes money to provider)
        ii. Balance without brackets (provider owes money to customer)
1. **Next invoice ID:** You can provide next invoice ID.
2. **Next payment ID:** You can provide next payment ID.
3. **Next payment request ID:** you can provide next payment request ID.
4. **Hide Credit Card Interfaces:** You can select this option to hide credit card interfaces from customer panel.
5. **Default Payment Group:** Select default payment group for your control panel.
6. **Verify reseller's credit card profile on Reseller Partner SignUp form:** Check box.
7. **Add next billing month in pro-rate bill when bill days are less than 15 days:** Check box.

Click **Save** when done.

Invoice Settings

Click on the Second tab, that is "**Invoice Settings**" to configure invoice setting. Here, you can setup when to generate invoice and when to email it to the client and other settings.

Reset Invoices: Provider/Reseller can reset invoices for their company. Select **Invoice Settings** tab, click on "**Reset Invoices**" button. This interface will delete all old invoices and payments and cancelled subscriptions/add-ons from the database and generates new invoices for selected payment group, from Next Renewal Date of the subscriptions/add-ons by picking prices etc. data from associated service plans.

Before running this operation, service queue should be empty for selected company. For each subscription this will generate single setup invoice with sum total of the associated add-ons with subscription.

Payment Queue Settings

Click on the Third tab, that is "**Payment Queue Settings**" to configure payment/credit card settings. Here, you can specify either to Charge or Authenticate the credit card, when to charge or how many time make an attempt to charge a credit card and similar other settings.

Charge: By selecting this option the payment is automatically paid and its status will be changed to complete. For viewing, please navigate to:

> 🔍 **Navigation: Home » Billing Manager » Documents » Payments**

Authenticate Only: When we select Authenticate only mode then payments will show in waiting capture tab.

> 🔍 **Navigation: Home » System Configuration » Billing Configuration » General Billing**

Click on the Third tab, that is **Payment Queue Settings** & select Authenticate Only.

Waiting Capture: When you select this option, the payments are placed in pending for transaction tab in online payment section. For viewing, please navigate to:

> 🔍 **Navigation: Home » Billing Manager » Online Payments » Online Payments » Waiting Capture**

Automatically process orders selected to be paid offline: By enabling this option the services will automatically be provisioned from service queue. By disabling this option the services will not automatically provisioned from service queue. You have to provision it manually by clicking **Run** in the **Service Queue**.

Advanced

Under **Advanced** Tab you can enable/disable the option to Allow Payment by Draft and Allow Payment by Cheque.

Invoice templates

Select Language and customize the invoice template as per requirement.

Credit Card Types

Under **Credit Card Types** tab you can enable/disable Credit Cards.

  i. Visa
  ii. MasterCard
  iii. American Express
  iv. Diners Club
  v. JCB
  vi. Maestro
  vii. Discover

CSP Billing

Give credit on O365/CSP Subscription Suspend/Upgrade/Quantity Decrease: Tick means Yes.

Note: This does not applies to:

1. Usage based reseller subscription.
2. Customer subscriptions which have Defer bill option enabled.

Invoice due period: Select day for invoice due period.

Click **Save** when done.

Tax Zones

It is a common practice to pay government tax and good businesses do take care of these business ethics by collecting and paying the taxes.

Control Panel facilitates you to induce this functionality into your business model with quite ease and that is seamlessly managed within your defined billing system at this platform.

1. Use build-In Taxation
2. Use Avalara for Taxation

To configure and add new tax zones you have to navigate the following path:

Navigation: Home » System Configurations » Billing Configurations » Taxation » Tax Zones

Adding Tax Zone

To add a new tax zone, click on the **Add Tax Zone** button and it will take you to the following interface, provide the relevant information and set the status of the zone and then, click on **Save**.

Enable/Disable Tax Collection

You can Enable/Disable tax collection in Billing Preferences, by navigating to the following path:

Navigation: Home » System Configurations » Billing Configurations » General Billing

Avalara AvaTax

In control panel as third party **Avalara** solution for sales automation and tax compliance is included to bring value to your business. When you want to use AvaTAx to calculate tax you have to provide below settings:

1. **Account ID:** Provide account ID.
2. **License Key:** Provide license key
3. **API Url:** Provide API URL.
4. **LIVE URL:** Provide live URL for e.g. https://rest.avatax.com
5. **Select Locale:** Select locale.

Tax Report

To view Tax Report navigate to the following path.

It shows the following listing:

1. **Country:** Select the country from the drop down list.
2. **State/Province:** Select the State/Province.
3. **Currency:** Select the currency.
4. **Date after:** Choose the after date from the calendar.
5. **Date before:** Choose the before date from the calendar.

Then, click on the **Generate** button to view the Tax Report.

Payment Groups

Currencies

Currency is one of the primary means of any business, it could be different from country to country or from one geographical location to another, depending upon demo graphical factors. Thus, Control Panel has the flexibility to get adapted for varying different currencies according to your business requirement.

To setup currencies suitably and to configure them with payment gateways, navigate to the following path:

Navigation: Home » System Configurations » Billing Configurations » Payment Groups

Add Payment Group

Adding a new payment group facilitates you to add new currency in the case if there is no default currency exists or you need to configure it as per your requirements.

Note: You can also edit existing payment group by clicking on the **Edit** link.

Click on the **Add Payment Group** button and it will take you to the interface where you can setup Payment Group according to your needs. Fill in the information and the fields which are marked with (*) are mandatory. Click on Next to complete the setup.

Note: The Currency field can NOT be changed while other fields can be edited later on.

Fraud Control

In any online business scenario, the safety and security of each transaction or any operation is the key to success. Your business is more reliable if you have strict anti-fraud or theft prevention schemes implied otherwise you may have huge degree of risk. Panel facilitates you to enforce built-in anti-fraud plug-ins to avoid any sort of theft or unauthorized access.

To configure Anti-Fraud Plug-ins, you have to navigate to the following path:

Navigation: **Home » System Configurations » Billing Configurations » Fraud Control**

There are 7 following anti-fraud plug-ins. To Enable/Disable any plug-in, check the box on the left and click on Enable/Disable, as per your requirements. For further settings and explanation click on any of the following list.

1. Country Black List
2. IP Black List
3. Credit Card Black List
4. Email Black List
5. Domain Name Black List
6. Phone Code Black List
7. Zip Pattern Black List

Country Black List

Country blacklist plug-in works on an abstract level, it simply blocks the access for each access or the IP's of the specified country. You can set Add/Delete any country to/from the blacklist plug-in.

IP Black List

IP blacklist plug-in is limited to the scope of just single IP or the specified IP range. You can add any suspected or malicious IP to/from blacklist.

Note: Use IP range carefully because a single digit in range can draw a big difference.

Credit Card Black List

Credit card blacklist plug-in is significantly important to avoid any sort of unauthenticated or unauthorized use of the card, once you found any card being used illegally or suspected, so you can Add/Delete the card number to/from the blacklist.

Email Black List

Email blacklist plug-in is similar to IP blacklist plug-in but the difference is obvious that its implies over Email address or addresses over a specified domain, this can be quite easy to restricted suspected or SPAM emails.

Note: Use *@DomainName.com to block all possible emails.

Domain Name Black List

Domain name blacklist plug-in is one step ahead then Email blacklist plug-in, you can simply Add/Delete the domain to/from the blacklist, which seems suspected or appear to be SPAM.

Phone Code Black List

Phone code blacklist plug-in is another useful component which helps to restrict illegal or unauthorized access, by filtering phone number against the ones specified in the blacklist.

Zip Pattern Black List

Zip pattern blacklist plug-in is similar to phone code plug-in but it is more strong as it has dual filtration by country and the pattern defined. It is quite simple to configure this plug-in by selecting a country and specifying the particular pattern to be blacklisted.

Anti Fraud Filters

Panel facilitates you to apply full proof and comprehensive anti-fraud filters which come as the built-in source towards proactive defense. You can enable/disable and configure these anti-fraud filters by navigating to:

> **Navigation: Home » System Configurations » Billing Configurations » Anti-Fraud Filters**

Here, **Threshold** is criteria of goodwill for a customer. The points will be awarded or deducted from customer repute on successful/failed order respectively.

You may enable/disable the filter as per your requirement.

First Order Filter

This filter will be applied to a customer who has placed an order with the company for the first time. This filter may contain more strict rules to streamline a legitimate or fraud order.You can enable/disable and configure these anti-fraud filters

You can also delete/enable or disable the filter by clicking on the related button.You can define the settings by clicking on the **Create New Rule** and these rule parameters will be used for this filter.

Second Order Filter

This filter will be applied to a customer who has placed an order with the company previously. This filter may contain moderate rules to streamline a legitimate or fraud order. Since, a customer is already known so it may bypass some strict rules as set in First Order Filter.

You can enable/disable and configure these anti-fraud filters

You can also delete/enable or disable the filter by clicking on the related button. You can define the settings by clicking on the **Create New Rule** and these rule parameters will be used for this filter.

Payment Gateways

Payment gateway is an important third-party component/module among different business environment where online payments are concerned. As there are many factors involved in making an online transaction including the safety and security of confidential credentials and a trusted link to carry the transaction. Thus by introducing some trusted and secure way to make online transaction, payment gateways are needed yet there are number of such gateways exist but at the platform of Control Panel you will be able to induce the only the supported gateways.

To configure any of the available payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.

Navigation: Home » System Configuration » Billing Configuration » Payment Gateways

For editing the settings on the gateways, click on **Configure**. When PCI compliance mode is **Enabled** following Payment Gateways will be shown:

Provider	Integration Status	Status	Options
2Checkout	Stable	Enabled	Configure
PayPal Express CheckOut	Stable	Enabled	Configure
Mollie	Stable	Enabled	Configure
Authorize.Net CIM	Stable	Enabled	Configure
PayPal Pro	Stable	Enabled	Configure
Zarin Pal	Stable	Enabled	Configure
Authorize.Net CIM Hosted	Stable	Enabled	Configure
Stripe	Stable	Enabled	Configure
PayPal Braintree	Stable	Enabled	Configure
PayStack	Stable	Enabled	Configure
Rabo Omnikassa	Stable	Enabled	Configure
PayiBAN SEPA Direct Debit	Stable	Enabled	Configure
Stripe Checkout	Stable	Enabled	Configure
Safer Pay	Stable	Enabled	Configure
Razor Pay	Stable	Enabled	Configure

When PCI Compliance Mode is **Disabled** following Payment Gateways will be shown:

Provider	Integration Status	Status	Options
2Checkout	Stable	Enabled	Configure

PayPal Express CheckOut	Stable	Enabled	[Configure](#)
BeanStream	Stable	Enabled	[Configure](#)
ESelectPlus	Stable	Enabled	[Configure](#)
Payment Junction	Stable	Enabled	[Configure](#)
Raven	Stable	Enabled	[Configure](#)
VCS	Stable	Enabled	[Configure](#)
St.George	Stable	Enabled	[Configure](#)
SoEasyPay	Stable	Enabled	[Configure](#)
Mundipagg	Stable	Enabled	[Configure](#)
Zarin Pal	Stable	Enabled	[Configure](#)
PayStack	Stable	Enabled	[Configure](#)
Rabo Omnikassa	Stable	Enabled	[Configure](#)
PayiBAN SEPA Direct Debit	Stable	Enabled	[Configure](#)
Stripe Checkout	Stable	Enabled	[Configure](#)
Razor Pay	Stable	Enabled	[Configure](#)

Configuring Provider: 2Checkout

To configure 2Checkout as your payment gateway navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Merchant ID:** Enter your 2Checkout merchant ID.
5. **API URL:** Defaults to *https://www.2checkout.com/2co/buyer/purchase?*. Usually you don't need to change this.
6. **Validate Gateway Response:** Enable this checkbox if you want to validate gateway response with a validation code you provide.
7. **Validation Code:** Enter the validation code to validate gateway response. You must login to your 2checkout merchant control center to retrieve this code.
8. **Text to show if selected:** Type necessary text.

Click **Save** when done.

Since 2Checkout.com is HTML gateway therefore there is additional setting to be done in your 2Checkout Merchant Control Center. To do this setting, follow procedure below:

a. Login to your 2Checkout.com control center.
b. Scroll down and click **Look & Feel** settings under **Helpful Links**.

This procedure tells 2Checkout where to send payments information (PIN). If this procedure is not followed you will have to manually enter New Payments in Control Panel.

IMPORTANT: Since 2Checkout doesn't send PIN notifications for recurring payments therefore you will have to manually enter all recurring payments in billing system.

Configure Provider: PayPal Express Checkout

IMPORTANT: You'll need to create an API username for PayPal, which is different from your PayPal username. Give the API username, password and signature in the settings below. Follow these steps.

1. Log in to your PayPal Business account.
2. Click **My Account**.
3. Click **Profile**.
4. Under "Account Information", click **API Access**
5. Click **Request API Credentials**.
6. Click **API Signature**.
7. Click the **Agree** checkbox.
8. Click **Submit**.

To configure PayPal as your payment gateway, navigate to the following path:
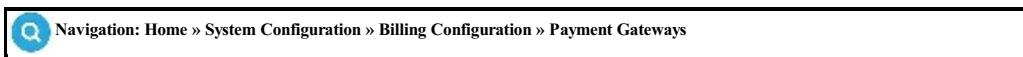
> **Navigation: Home » System Configuration » Billing Configuration » Payment Gateways**

Click on the **Configure** link and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **API Client ID:** Please go to https://developer.paypal.com/developer/applications/ , scroll down, and either use existing REST API APP or create new one. To create a PayPal app and get API Client ID, please visit: https://developer.paypal.com/developer/applications/create
5. **Text to show if selected:** Type necessary text.

Click **Save** when done.

Configure Provider: Mollie

To configure Mollie as your payment gateway, navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Partner ID:** Enter your Mollie partner ID.

Click **Save** when you are done.

Configure Provider: Authorize.NET

To configure Authorize.NET as your payment gateway, navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **API Login:** Enter your Authorize.NET API login ID. You must login to your Authorize.NET account to retrieve this login ID. It should be under Account Settings.
5. **API Transaction Key:** You must login to your Authorize.NET account to retrieve this key. It should be under Account Settings.
6. **API URL:** Defaults to *https://secure.authorize.net/gateway/transact.dll*. Usually you don't need to change this.
7. **Validate Gateway Response:** Enable this checkbox if you want to validate gateway response with a validation code you provide.
8. **Validation Code:** Enter the validation code to validate gateway response. You must login to your Authorize.NET account to retrieve this code.
9. **Text to show if selected:** Type necessary text.

Click **Save** when done.

Configure Provider: PayPal Pro

To configure any of the available payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.

For editing the settings on the gateways, click on **Configure** link.

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Secret Key:** Provide secret key.
5. **API URL:** Provide api url.
6. **Text to show if selected:** Provide text.

Click on **Save** button when done.

Configure Provider: ST. George

To configure St.George as your payment gateway navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Server:** Type the server of the St.George. i.e. www.gwipg.stgeorge.
4. **Customer ID:** Enter customer Id of the test account.
5. **Certificate:** Enter certificate number.
6. **Password:** Enter password.
7. **Text to show if selected:** Type necessary text.

Click **Save** when done.

Configure Provider: BeanStream

To configure BeanStream as your payment gateway, navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Merchant ID:** Enter your BeanStream merchant ID.
5. **API Username:** Provide API Username.
6. **API Password:** Provide API password.
7. **Text to show if selected:** Provide text to show.

Click **Save** when you are done.

Configure Provider: ESselectPlus

To configure ESselectPlus as your payment gateway navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.

Provider Configuration

1. **API Token:** Enter your ESselectPlus API Token.
2. **Store ID:** Enter the store id.
3. **API URL:** Enter the API url.
4. **Text to show if selected:** Type necessary text.

Click **Save** when done.

Configure Provider: Payment Junction

To configure any of the available payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.

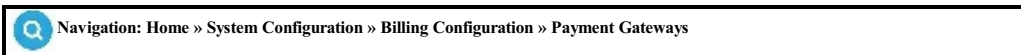🔍 **Navigation: Home » System Configuration » Billing Configuration » Payment Gateways**

For editing the settings on the gateways, click on **Configure** link.

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **API Login:** Enter your Payment Junction API login ID. You must login to your Payment Junction account to retrieve this login ID. It should be under Account Settings.
5. **API Password:** You must login to your Payment Junction account to retrieve this key. It should be under Account Settings.
6. **API URL:** Defaults to *www.payjunctionlabs.com*.
7. **Text to show if selected:** Provide text.

Click on **Save** button when done.

Configure Provider: Raven

To configure any of the available payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.

For editing the settings on the gateways click on **Configure** link.

Provider Status section shows the following fields:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.

Provider Configuration section displays the following fields:

1. **User name:** Provide the user name.
2. **Shared Secret:** Provide shared secret.
3. **PRN (Payment Routing Number):** Provide payment routing number (PRN).
4. **Text to show if selected:** Provide text.

Click on **Save** button when done.

Configure Provider: Virtual Card Services VCS

To configure VCS as your payment gateway navigate to the following path:

Navigation: Home » System Configuration » Billing Configuration » Payment Gateways

Click on the **Configure** link and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Terminal-Id/User-Id:** Provide the Terminal-id/user-id.
4. **Gateway Url:** It is the Gateway URL. You don't need to change this URL.
   https://www.vcs.co.za/vvonline/ccxmlauth.asp
5. **Text to show if selected:** Type necessary text.

Click **Save** when done.

Configure Provider: SoEasyPay

To configure SoEasyPay as your payment gateway navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Terminal-Id/User-Id:** Provide the Terminal-id/user-id.
4. **Password:** Provide password.
5. **Gateway Url:** It is the Gateway URL. You don't need to change this URL.
   https://secure.soeasypay.com/gateway.asmx
6. **Text to show if selected:** Type necessary text.

Click **Save** when done.

Configure Provider: MundiPagg

To configure Mundipagg your payment gateway navigate to the following path:

🔍 **Home » System Configuration » Billing Configuration » Payment Gateways**

Click on the **Configure** link and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Merchant Key:** Provide MundiPagg Merchant Key.
5. **Gateway Url:** Provide gateway URL.
6. **Text to show if selected:** Type necessary text.

Click **Save** when you are done.

Configure Provider: Zarin Pal

To configure Zarin Pal as your payment gateway, navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Merchant ID:** Provide Merchant ID.
4. **API URL:** Enter Zarin Pal API URL.
5. **Text to show if selected:** Provide text.

Click **Save** when done.

Configure Provider: Authorize.NET CIM Hosted

To configure Authorize.NET CIM Hosted as your payment gateway, navigate to the following path:

Click on the **Configure**link and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **API Client ID:** Enter your **Authorize.NET CIM Hosted** Client ID.
5. **API Transaction Key:** You must login to your **Authorize.NET CIM Hosted** account to retrieve this key. It should be under Account Settings.
6. **Text to show if selected:** Type necessary text.

Click **Save** when done.

Configure Provider: Stripe

To configure any of the available payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.

To configure the settings for a gateway, click on **Configure** link.

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Publishable Key:** Provide publishable key.
5. **Secret Key:** Provide secret key.
6. **Text to show if selected:** Provide text.

Click on **Save** button when done.

Configure Provider: PayPal Braintree

To configure any of the available payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.

For editing the settings on the gateways, click on **Configure** link.

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Braintree Merchant Id:** Provider braintree merchant id.
5. **Braintree Secret Key:** Provide secret key.
6. **Braintree Public Key:** Provide public key.
7. **Text to show if selected:** Provide text.

Click on **Save** button when done.

Configure Provider: PayStack

To configure any of the available payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.

For editing the settings on the gateways, click on **Configure** link.

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Secret Key:** Provide secret key.
5. **Public Key:** Provide public key.
6. **Text to show if selected:** Provide text.

Click on **Save** button when done.

Configure Provider: Rabo OmniKassa

To configure any of the available payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.

For editing the settings on the gateways, click on **Configure** link.

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Signing Key:** Provide signing key.
5. **Refresh Token**: Provide refresh token.
6. **Text to show if selected:** Provide text.

Click on **Save** button when done.

Configure Provider: PayiBAN SEPA Direct Debit

To configure PayiBAN SEPA Direct Debit as your payment gateway, navigate to the following path:

🔍 **Navigation: Home » System Configuration » Billing Configuration » Payment Gateways**

Important: SEPA payment method only works with EURO. Provider/Owner must have tenant account for PayiBank. Merchant must be added and API keys must be generated in tenant before proceeding.

Click on the **Configure** link and follow the instructions below:

Provider

1. **Provider:** It shows PayiBAN SEPA Direct Debit
2. **Friendly name:** Provide friendly name of payment gateway.
3. **Enabled:** Select Yes or No.
4. **Enable Test Mode:** It will shows if test mode is available.

Provider Configuration

PayiBank Details (These details will be fetched from your PayiBank Reseller Account "This is an API Account" for automated e-mandate creation):

1. **PayiBank Tenant API Key:** You get this key from PayiBank reseller account.
2. **PayiBank Tenant REST API URL:** This needs to be set as per Payment Gateway state (Test or Live). In both cases their respective URLs will be as follows:
   a. **LIVE URL:** https://payibank.io/api
   b. **TEST URL:** https://acc.payibank.io/api

PayiBAN Details (These details will be fetched from your PayIBAN Account "This is the actual account in which direct debits and corresponding XML batches can be managed")

1. **PayiBAN API User Name:** Account Username.
2. **PayiBAN API Password:** Account Password.
3. **PayiBAN Client ID:** This can be found under Account Profile.
4. **PayiBAN API URL:** This is a static URL i.e. https://api.payiban.com/webservice/index.php

Creditor's (payment recipient's) Bank Details (will be provided by corresponding bank):

1. IBAN
2. BIC
3. Direct Debit Collector ID
4. Creditor Id
5. Creditor Name
6. Creditor Country

Additional Panel related options for SEPA Flow and Direct Debit:

1. **Instrumentation:** We have two types of SEPA Mandates: B2B and CORE. Select and configure corresponding instrumentation type for your resellers and customers. (each reseller will get the same options and will need to configure these as per his needs for their end customers).
   a. **B2B stands for:** Business to Business. This is used when the Reseller has a real Business Bank account.
   b. **CORE stands for:** Business to Consumer. This is used when the Reseller is a small company and has a Personal Bank account only.
2. **Allow to create profile from store:** These are generic settings for payment gateways, for online store and may not be useful in case of SEPA. With these settings, the customer is able to add their payment profile details directly via the online store. Like if you are using a credit card, the system will allow to add credit card directly via store when placing order. For SEPA not sure if the setting is valid.
3. **Restrict Reseller's navigation in Panel (if no SEPA mandate exists):** If restrict reseller navigation is selected,

reseller have to create its SEPA mandate in his my provider section. Otherwise they will not be allowed to access any interface after login (where ever they click, they will automatically be redirected to add SEPA mandate page.)

4. **Text to show if selected:** Gateway text is not useful in case of SEPA, normally we display it in summary box, while doing payment in checkout process in front of selected payment gateway checkbox.
5. **Gateway handling fee:** The gateway handing fee is added in invoice for recurring invoices and new orders if client uses this gateway for payment(s). 1st order is exempted of gateway charges.

Click **Save** when done.

Configure Provider: Stripe Checkout

To configure any of the available payment gateways, you will have to navigate to the following path:

To configure the settings for a gateway, click on **Configure** link.

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Friendly name:** Provide friendly name of the payment gateway.
3. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
4. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.

Provider Configuration

1. **Publishable Key:** Provide publishable key.
2. **Secret Key:** Provide secret key.
3. **Text to show if selected:** Provide text.
4. **Gateway handling fee:** The gateway handing fee is added in invoice for recurring invoices and new orders if client uses this gateway for payment(s). 1st order is exempt of gateway charges.

Click on **Save** button when done.

Configure Provider: Safer Pay

To configure any of the available payment gateways, you will have to navigate to the following path:

To configure the settings for a gateway, click on **Configure** link.

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Friendly name:** Provide friendly name of the payment gateway.
3. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
4. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.

Provider Configuration

1. **API Username:** Provide API username.
2. **API Password:** Provide api password.
3. **Safer Pay Customer Id:** Provider safer pay customer Id.
4. **Terminal ID:** Provide terminal id.
5. **Text to show if selected:** Provide text.
6. **Gateway handling fee:** The gateway handing fee is added in invoice for recurring invoices and new orders if client uses this gateway for payment(s). 1st order is exempt of gateway charges.

Click on **Save** button when done.

Configure Provider: Razor Pay

To configure Razor Pay as your payment gateway, navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Friendly name:** Provide friendly name.
3. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
4. **Enable Test Mode:** Select YES if you want to enable test mode.
5. **API Key:** Provide razor pay API key..
6. **Secret Key:** Enter Razor Pay secret key.
7. **Text to show if selected:** Provide text.
8. **Gateway handling fee:** Provide gateway handling fee.

Click **Save** when done.

Email Templates

The flow of handy and well managed information among different involved entities in a business is the primary goal to be achieved. As this plays a very significant role in each business operation, one of such managed piece of information could be in the form of an email or a draft, which can be your business identity for a product or any other important document. Thus, Control Panel provides you different email templates which you can modify according to your needs and trends with ease and flexibility to interact with your customers for billing issues or any other concerns.

To setup email templates you have to navigate the following path:

Navigation: System Configurations » Billing Configurations » Email Configurations » Email Templates

Email Delivery Settings

To send mails successfully, you have to provide valid SMTP details. See also Email Delivery.

Note: SMTP user name MUST be complete email address.

Customizing Email Templates

The emails that are sent out to your customers can be fully customized. Before customizing templates, understand the following concept.

Runtime Variables: Runtime variables are set of variables which you can use in the email template. These variables are replaced with actual value at the time of email generation. Runtime variables are great for fully customizing your emails.

Example: If you insert %companyName% variable in an email template it will be replaced with "Your Company Name" when the email is actually sent out to the customer.

When customizing email template, you will notice 3 types of runtime variables available.

1. **Company Variable:** These are set of company related variables.
2. **Customer Variables:** These are set of customer related variables.
3. **Group Variables:** These are specific to email group you are editing. For example, when editing Package Information Group emails you will see variables like %packageName%, %subscriptionID% etc.

To customize email template navigate to the following path:

> 🔍 **Navigation: Home » System Configuration » Emails Configuration » Email Templates**
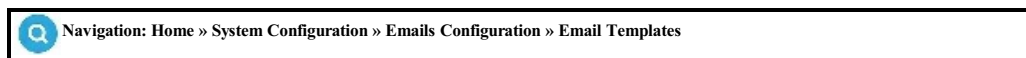
The Email Templates screen shows the following:

- **Operations:** Under this box you set the email addresses for the email group. You can configure different email addresses for each email group.

Click **Edit Template** button for the template you wish to customize. The edit template screen shows following:

1. **Email template group:** Select template group.
2. **Email template name:** Select template name.
3. Click **Load Default Template** to return to default email.
4. **Change email template name:** Friendly name. You don't need to change this setting.
5. **Locale Language:** Set the language locale for your email.
6. **Email priority:** Set the priority flag for your email.
7. **Subject:** This is the subject with which the email is sent. You can use variables in the subject line too.
8. **Body:** This is the actual email body. You can use %Variables% inside body. You can change the text in your emails but you MUST use valid variables. Use the drop down list boxes for automatic insertion at cursor location instead of typing it.
9. **Enable/Disable Template:** Enable this check box if you want to suppress the email template. In this case the email will always be bypassed.
10. **Enable/Disable all Templates of Group:** select Option to Enable/Disable templates.
11. **Set as default:** You can set a template as default.
12. **Do not send to Customer:** Check this option so that email is not sent to customer.

Click **Save** button when you are done.

Email Delivery Settings

Control Panel support SMTP mail sending method. SMTP method is easiest and most fastest method.

To configure email delivery, navigate to the following path:

Navigation: Home » System Configuration » Emails Configuration » Email Delivery

Email Delivery screen shows the following:

1. **SMTP Server:** Set here the SMTP server you use for emails. Example: mail.xyzhost.com.
2. **Port:** Set here the port number for your SMTP server. Default port is 25.
3. **SMTP server requires authentication:** Enable this check box if your SMTP server requires authentication.
4. **SMTP User Name:** Enter SMTP user name if SMTP authentication is ON. It is usually in user@domain.com format.
5. **Password:** Enter your SMTP password.

Click **Save** when you are done.

Hosting Panels

Control Panel supports all popular hosting control panels in the market. This includes Hostmatic & Plesk. To view the list of available hosting panel providers, navigate to:

It shows the following listing:

1. **Provider :** Control Panel supports the following Hosting Panels.
    i. Hostmatic Control Server
    ii. Plesk
2. **Integration Status :** It displays the integration status.
3. **Status:** It shows that the server is enabled or disabled.

Domain Registrars

There is ever growing list of domain registrars supported by Control Panel. This includes Enom, DirectI, PKNIC and Stargate and more. To view the list of available hosting panel providers, navigate to:

You may configure your required provider by clicking on the **Configure**.

Provider	Integration Status	Status	Options
Direct I (Logic Boxes)	Stable	Enabled	a. Configure b. Enable/Disable
DK Hostmaster Registry	Stable	Enabled	a. Configure b. Enable/Disable
Enom	Stable	Enabled	a. Configure b. Enable/Disable
GoDaddy	Stable	Enabled	a. Configure b. Enable/Disable
Offline Domain Registrar	Stable	Enabled	a. Configure b. Enable/Disable
OpenSRS	Stable	Enabled	a. Configure b. Enable/Disable
Registry.be	Stable	Enabled	a. Configure b. Enable/Disable
RRPproxy	Stable	Enabled	a. Configure b. Enable/Disable
RRPproxy EPP	Stable	Enabled	a. Configure b. Enable/Disable
SIDN EPP	Stable	Enabled	a. Configure b. Enable/Disable
StarGate	Stable	Enabled	a. Configure b. Enable/Disable
TransIP	Stable	Enabled	a. Configure b. Enable/Disable

Direct I/Logic Boxes

In order to configure DirectI domain registrar navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enable DirectI(Logic Boxes):** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your DirectI reseller login ID.
5. **Test mode Password:** Enter your DirectI reseller password.
6. **Test mode Parent ID:** Enter your DirectI Parent ID.Contact DirectI or its reseller for the ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

DK Hostmaster Registry

In order to configure DK hostmaster registry domain registrar navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your DK hostmaster reseller login ID.
5. **Test mode Password:** Enter your DK hostmaster reseller password.
6. **Test mode Parent ID:** Enter yourDK hostmaster Parent ID.Contact DK hostmaster or its reseller for the ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data**if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data**if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

eNom

To configure eNom domain registrar navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enable eNom:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your eNom reseller login ID.
5. **Test mode Password:** Enter your eNom reseller password.
6. **Test mode Parent ID:** Enter your eNom Parent ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Parked Domain Name Servers:** Select the name servers assigned by default to domain registrations.
10. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
11. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
13. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Important: eNom TEST and LIVE servers are restricted by IP. You must contact eNom support, provider them your IP and request to allow it for TEST/LIVE API calls.

To do this:

1. Log into your eNom reseller account, click on left menu option Help then, eNom **Support Center** link.
2. Click the request help feature from Support Center tool.
3. Send your login name and the IP address you want added to the live environment.
4. You will receive a confirmation email with the case assigned.
5. eNom will reply back via the assigned case when it's completed.

Click **Save** when done.

GoDaddy

In order to configure GoDaddy domain registrar navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your GoDaddy reseller login ID.
5. **Test mode Password:** Enter your GoDaddy reseller password.
6. **Test mode Parent ID:** Enter your GoDaddy Parent ID. Contact GoDaddy or its reseller for the ID.
7. **API Key:** Provide GoDaddy API key.
8. **Secret Key**: Provide secret key.
9. **Allow Transfer:** Will you allow domain transfer? Select Yes.
10. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
11. **Parked Domain Name Servers:** Select the name servers assigned by default to domain registrations.
12. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
13. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
14. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
15. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

Offline Domain Registrar

To configure Offline Domain Registrar navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Provider:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your Offline Domain Registrar reseller login ID.
5. **Test mode Password:** Enter your Offline Domain Registrar reseller password.
6. **Test mode Parent ID:** Enter your Offline Domain Registrar Parent ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

OpenSRS

To configure OpenSRS domain registrar navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **User name:** Enter your OpenSRS reseller login ID.
5. **Password:** Enter your OpenSRS reseller password.
6. **Confirm Password:** ReEnter your password.
7. **API key:** Enter API key.
8. **Allow Transfer:** Will you allow domain transfer? Select Yes.
9. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
10. **Parked Domain Name Servers:** Select the name servers assigned by default to domain registrations.
11. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
12. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
13. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
14. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

Registry.be

To configure RegistryBE domain registrar navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your RegistryBE reseller login ID.
5. **Test mode Password:** Enter your RegistryBE reseller password.
6. **Test mode Parent ID:** Enter your RegistryBE Parent ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data**if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

RRPproxy

To configure RRPproxy domain registrar navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your RRPproxy reseller login ID.
5. **Test mode Password:** Enter your RRPproxy reseller password.
6. **Test mode Parent ID:** Enter your RRPproxy Parent ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

RRPproxy EPP

To configure RRPproxy EPP domain registrar navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your RRPproxy EPP reseller login ID.
5. **Test mode Password:** Enter your RRPproxy EPP reseller password.
6. **Test mode Parent ID:** Enter your RRPproxy EPP Parent ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

SIDN EPP

To configure SIDN EPP domain registrar navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your SIDN EPP reseller login ID.
5. **Test mode Password:** Enter your SIDN EPP reseller password.
6. **Test mode Parent ID:** Enter your SIDN EPP Parent ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

Stargate

To configure Stargate domain registrar navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your Stargate reseller login ID.
5. **Test mode Password:** Enter your Stargate reseller password.
6. **Test mode Parent ID:** Enter your Stargate Parent ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

Trans IP

To configure TransIP domain registrar navigate to the following path:

Click on the **Configure** link and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your TransIP reseller login ID.
5. **Test mode Password:** Enter your TransIP reseller password.
6. **Test mode Parent ID:** Enter your TransIP Parent ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

Exchange Providers

To configure Exchange Server as your exchange based hosted email service provider, navigate to the following path:

It shows the following listing:

1. **Provider:** Control panel supports following Microsoft Exchange Servers.
    i. Microsoft Exchange 2007
    ii. Microsoft Exchange 2010
    iii. Microsoft Exchange 2010 Hosted
    iv. Microsoft Exchange 2013
    v. Microsoft Exchange 2016
    vi. Microsoft Exchange 2019
2. **Integration Statu :** It displays the integration status.
3. **Status:** It shows that the server is enabled or disabled.

Make sure that the provider status shows *Tick* mark and **Enabled** sign.

Note: You can Enable/Disable the Exchange Server 2007/2010 Hosting/Non-Hosting by clicking the Enable/Disable Provider button.

SharePoint Providers

To configure Windows SharePoint Services as your SharePoint service provider navigate to the following path:

It shows the following listing:

1. **Provider:** Control Panel supports following Microsoft SharePoint servers.
    i. WSS3.0/MOSS 2007
    ii. Microsoft SharePoint 2010
    iii. Microsoft SharePoint 2010 Multi-tenant
    iv. Microsoft SharePoint 2013
    v. Microsoft SharePoint 2013 Multi-tenant
    vi. Microsoft SharePoint 2016
    vii. Microsoft SharePoint 2016 Multi-tenant
    viii. Microsoft SharePoint 2019
    ix. SharePoint Server Subscription Edition
2. **Integration Status:** It displays the integration status.
3. **Status:** It shows that the server is enabled or disabled.

Make sure that the provider status shows *Tick* mark and **Enabled**sign.

CRM Providers

You can disable/enable CRM Providers by clicking on the Disable/Enable Provider button after navigating to:

It shows the following listing:

1. **Provider:** Control Panel supports following Microsoft CRM servers.
   i. CRM 4.0
   ii. CRM 2011
   iii. CRM 2013
   iv. CRM 2015
   v. CRM 2016
   vi. Dynamics 365
2. **Integration Status:** It displays the integration status.
3. **Status:** It shows that the server is enabled or disabled.

Make sure that the provider status shows *Tick* mark and **Enabled** sign.

Skype4B Providers

To view available Skype4BLync providers navigate to the following path:

It shows the following listing:

1. **Provider :** Control Panel supports following Microsoft Skype4B\Lync Servers.
     i. Microsoft Lync server 2010
    ii. Microsoft Lync 2010 Hosting Pack
   iii. Microsoft Lync 2013
    iv. Microsoft Lync 2013 Hosting Pack
     v. Skype for Business 2015
    vi. Skype for Business 2019
2. **Integration Status :** It displays the integration status.
3. **Status:** It shows that the server is enabled or disabled.

Note: You can Enable/Disable provider on clicking the **Enable/Disable** button.

Database Server

Control Panel supports all popular databases in the market. To view the list of available database providers navigate to the following path:

It shows the following listings:

1. **Provider:** Control Panel supports following Database Servers.
    i. SQL Server 2000
    ii. SQL Server 2005
    iii. SQL Server 2008
    iv. MySQL
    v. SQL Server 2012
    vi. SQL Server 2014
    vii. SQL Server 2016
2. **Integration Status:** It displays the integration status.
3. **Status:** It shows that the server is enabled or disabled.

Mail Server

Several mail servers are supported by Control Panel that comprise of Mail Enable, Merak Mail, and SmarterMail etc. To view the list of available mail providers, navigate to:

> **Navigation: Home » System Configuration » Providers » Mail Server**

It shows the following listing:

1. **Provider :** Control Panel support following Mail Servers:
    i. Mail Enable 3.0
    ii. Merak Mail 9.2.1
    iii. IMail Server 8.21 (Pending)
    iv. SmarterMail 5.x (Pending)
    v. SmarterMail 6.x
    vi. SmarterMail 8.x
    vii. SmarterMail 11.x/12.x/13.x.
2. **Integration Status:** It displays the integration status.
3. **Status:** It shows that the server is enabled or disabled.

FTP Server

Control Panel provides support for a variety of FTP providers. To view the list of available FTP providers navigate to the following path:

It shows the following listing:

1. **Provider:** Control Panel support following FTP servers:
      i. Microsoft FTP
      ii. Gene6 FTP
      iii. Filezilla Server
      iv. Microsoft FTP 7.5
      v. Microsoft FTP 10 Server (Windows 2016)
2. **Integration Status:** It displays the integration status.
3. **Status:** It shows that the server is enabled or disabled.

Web Server

To view the list of available Web servers navigate to:

It shows the following listing:

1. **Provider:** Control Panel supports following Internet Information Servers:
     i. Internet Information Server 6
    ii. Internet Information Server 7
   iii. Internet Information Server 8
    iv. Internet Information Server 10
2. **Integration Status:** It displays the integration status.
3. **Status:** It shows that the server is enabled or disabled.

Click **Save** when enabled.

DNS Server

For a list of DNS servers along with status corresponding to particular DNS server can be viewed at:

It shows the following listings:

1. **Provider:** It displays the Microsoft DNS and Simple DNS Plus.
2. **Integration Status:** It displays the integration status.
3. **Status:** It shows that the server is enabled or disabled.

Click **Save** when enabled.

Stats Server

To view the list of available providers navigate to the following path:

It shows the following listing:

1. **Provider:** It supports SmarterStats.
2. **Integration Status:** It displays the integration status.
3. **Status:** It shows that the server is enabled or disabled.

Click **Save** when enabled.

SSL Vendors

To view list of SSL vendors that can be enabled or disabled navigate to the following path:

 It shows the following listing:

1. **Provider:** Control Panel supports the DigiCert SSL.
2. **Integration Status:** It displays the integration status.
3. **Status:** It shows that the server is enabled or disabled.
4. **Configure:** Click on **Configure** link in front of the SSL vendor and provide the following:
   i. **Provider:** It shows the SSL vendor name for e.g DigiCert.
   ii. **Customer Name:** Provide customer name.
   iii. **Customer Account #:** Provide the customer account number.
   iv. **API Key:** Provide API key.

Click on **Save** when done.

DigiCert Central Configuration

Click on **DigiCert Central** tab

1. **API Key:** Provide API Key
2. **API Url:** Provide API URL.
3. **Parent Division Id:** Provide parent Division ID.
4. **Enabled:** Select Enabled.

Click on **Save** when done.

VPS Providers

You can disable/enable Microsoft Hyper-V Server by clicking on the Disable/Enable Provider button after navigating to:
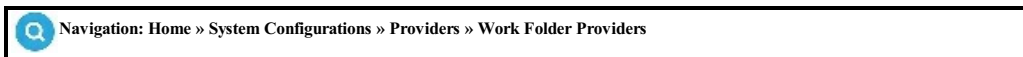
It shows the following listing:

1. **Provider:** Control Panel supports following Hyper-V Servers.
    i. Microsoft Hyper-V Server 2008
    ii. Microsoft Hyper-V Server 2012
    iii. Microsoft Hyper-V Server 2012 R2
    iv. Microsoft Hyper-V Server 2016
    v. Microsoft Hyper-V Server 2019
    vi. Microsoft Hyper-V Server 2022
2. **Integration Status:** It displays the integration status.
3. **Status:** It shows that the server is enabled or disabled.

Click **Save** when enabled.

Work Folder Providers

To view Work Folder Providers that can be enabled or disabled navigate to the following path:

It shows the following listing:

1. **Provider:** Control Panel supports the Microsoft Windows Server 2016.
2. **Integration Status:** It displays the integration status.
3. **Status:** It shows that the server is enabled or disabled.

Click **Save** when enabled.

RDS Providers

To view RDS Providers that can be enabled or disabled navigate to the following path:

It shows the following listing:

1. **Provider:** Control Panel supports all versions of Microsoft Remote Desktop Service.
2. **Integration Status:** It displays the integration status.
3. **Status:** It shows that the server is enabled or disabled.

Click **Save** when enabled.

Configuring Store and Setting Up Order Form(s)

Control Panel provides built-in store front for online sale of services. You can launch Store using Order Form. You have option to create multiple store portals (order forms). These order forms enable you to sell your products and bill them by presenting a front end / store front to the customer. It is very easy to build an online store using Control Panel's Store Order Form. Using order forms you can sell products, charge credit card and provision services.

This online store enables users to select services you offer on the online store, it allows them to create new accounts or use their existing account to purchase services. It allows new customers to select services, make their account and pay for the purchased services in the same go. They can choose different products and services using this very self-intuitive web interface.

You may create unlimited number of order forms in Control Panel each branding for different set of product and currencies.

To setup order form navigate to the following path:

🔍 **Navigation: Home » System Configuration » Store Configuration**
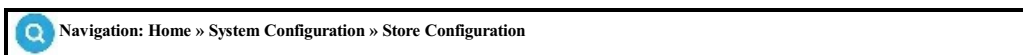
Note: You may also edit the existing order form by clicking on the **Edit** link.

Click **New Order Form** button and follow the instructions below:

1. **Order Form Name:** The name for your order form.
2. **Payment Groups:** Select the currency this order form will use. You may assign more than 1 Payment Group to order form but you have to ensure the products are configured for all the selected currencies.
3. **Domain option:** Select whether domain purchasing will be available on the form or not.
4. **Pay by Cheque Allowed:** Select *Yes* if you want to allow Cheque payment on checkout.
5. **Pay by Bank Draft Allowed:** Select *Yes* if you want to allow Bank draft payment on checkout.
6. **Pay by Invoice:** Select *Yes* if you want to allow submitting order without payment. In this case order is registered in system and held until user pays the invoice.
7. **Continue Shopping URL:** Enter the URL where you want to take user when **Continue Shopping** button on the form is clicked.
8. **Terms URL:** Enter the URL where terms of service is available.
9. **Header:** Customize header of your store
10. **Footer:** Customize Footer of your store
11. **Products sold through this Order Form:** Select the products you wish to sell via the order form you are setting up.

Click **Save** button when you are done.

Once the order form is set up, you will see **Launch Store** link. Click on the link to launch the newly configured store. Copy the URL from the address bar of the newly opened window of store front page and publish it on the web. The URL is same as the control panel URL with additional parameters like store ID.

Customizing Order Forms

You can also customize your existing order forms. To customize order form text navigate to the following path:

Click on the **Edit** link.

Select **Language** and provide Custom Text for Menu, Title and description for each Module.

Click **Save** when done.

Click on the **Edit** link.

Select **Language** and provide Custom Text for Menu, Title and description for each Module.

Notifications

This is an announcement facility that is provided to facilitate display of major announcements, alerts and notifications right at the dashboard or on the login page. For example, when invoices are sent automatically, account expiry alerts, suspension alerts etc.

To view list of notifications that would display at the login or dashboard, navigate to following path:

> 🔍 **Navigation: Home » System Configuration » Notifications**

Note: You may modify or remove existing notifications by clicking on **Edit** or **Delete** respectively.

You can include new notifications by clicking at the **Add Notification** button. Simply, fill in the following necessary fields and click **Save** to continue:

1. **Title:** Main head for the notification.
2. **Notification:** Description of corresponding notification goes here.
3. **Start Date:** Select the start date from which the notification will become active.
4. **End Date:** Specify the end date after which the notification will be de-activated automatically.
5. **Visible To:** Select transparency level e.g. notification visible to reseller, customer or not.
6. **Display Area:** Select your desired placement for notification to appear, either at the login or at the dashboard or both.

Click **Save** when done.

How to email notifications?

Select **Email Notifications** tab. Click **Compose Email** to configure email Notifications for customers:

1. **Subject:** Provide subject.
2. **Select Product Type:** Select product e.g. Active Directory, Exchange etc.
3. **Send To (Customers):** Select customers.
4. **From Address:** Provide from email address.
5. **From Name:** Provide from name.
6. **From Email:** Select from email address.
7. **Reply to mode:** Select reply to mode.
8. **Attachment:** Select attachment if any.
9. **Body:** Provide email body.
10. **Schedule:** Checkbox to schedule.

Click **Save** when done.

MailChimp Settings

Mailchimp is a marketing automation platform and an email marketing service. To configure mailchimp in control panel navigate to following path:

Navigation: Home » System Configuration » MailChimp

Under **MailChimp Settings** tab select **Enabled** and provide API settings as below:

- **API Url:** Provide API url.
- **API Key:** Provide API Key.

Hint: API Key: Log in to mailchimp.com, go to Account, go to Extras, click on API Keys and create a Key

Click **Save** when done.

Viewing Staff Users

Staff Users are those users which are assigned a particular role. These role based users have access to some of the the control panel areas such as Billing, HelpDesk.

To view staff users, navigate to the following path:

The list of staff users displays following:

1. **Status:** It shows the status of the user.
2. **Name**: The full name of staff user.
3. **Email:** The email address of staff user. It is also the login ID for staff user.
4. **Last Login:** Shows the last login date and time.
5. **Last Login IP:** Shows the IP from where this user logged-in.
6. **Options:** It shows options to **Edit** and **Disable** the staff users.

You can add new staff users by clicking on **Add Staff Members**

Note: You can edit an existing staff user by clicking on the **edit** link.

Staff Users

Staff users are your staff member who can access the administrative features.

To add staff users, navigate to the following path:

Click **Add Staff Member** button and follow the instructions below:

1. **Passport Login:** Enter the email address of user. This is used as login for the system.
2. **Passport Password:** Enter a password for the staff member.
3. **Authenticate via AD Account:** The AD users can also be authenticated by providing UPN. See Also Authenticate AD user
4. **Roles:** Select the Roles you want to assign to staff user. New roles can be created and assigned to users.

Primary Contact: Here only First Name and Last Name fields are compulsory. Other scan be left blank.

Click **Save** button when finished.

Note: The Active directory domain and the user LDAP path should be configured under **Active directory** tab.

Add Sub Reseller

A sub-reseller is partner of a provider/reseller who can manage some assigned customers (during customer creation you can choose if that customer can be managed by the sub-reseller and choose that sub-reseller).

It is a three step process:

1. Add Sub reseller role
2. Add Staff User and assign sub reseller role
3. Choose sub reseller during customer creation

Step-1:

Create a sub reseller role. In order to add a sub reseller role, navigate to the following Path:

> 🔍 **Navigation: Home » System Configuration » System Users » Staff Roles**

To create a new Sub Reseller role, click **Add New Role** button and check option **Is sub reseller**.

Step-2:

Create a new staff user and assign sub reseller role created in step-1. Navigate to following path:

> 🔍 **Navigation: Home » System Configuration » System Users » Staff Users**

Click **Add Staff Member** button to add a staff user.

Step-3:

If you want your customer to be managed by this sub reseller you can assign this sub reseller during **create customer**. Navigate to following path:

> 🔍 **Navigation: Home » Customer Manager » Customers**

Now click **New Customer** to add a new customer. Select sub reseller under **Managed By Sub Reseller**.

To update existing customers you need to select Customers(s) from the listing. You will see button **Update Sub Reseller**. Click **Update Sub Reseller** and select sub reseller from the drop down list.

Click **Save and Apply** when done.

Configure Password Policy

To configure password policy for control panel customers and users, navigate to the following path:

Password Configuration

Under **Configuration** tab, you can also set password length and complexity.

1. **Must contain at least 1 capital and 1 small alphabet:** Select option to define complexity.
2. **Must contain at least 1 numeric character:** Select option to define complexity.
3. **Must contain at least 1 special character:** Select option to define complexity.
4. **Minimum password length:** Minimum length should be at least 8 characters.
5. **Enable Password Expiration:** Select option to enable password expiration in control panel.
   a. **Password expires in:** Provide number of days.
   b. **Exclude users from password expiration:** Select and add Users.

Click **Save** button when finished.

Viewing Staff Roles

Staff roles define privileges assigned to the Staff member. To view staff roles, navigate to the following path:

There are couple of pre-defined roles that come packaged with Control Panel. These roles include:

1. **Super Administrator:** This role has full unrestricted access to the system. Assign this role only to the staff members who will have full access to every feature of the system.
2. **Billing Administrator:** This role can access only billing relevant section of system. For example, this role can access *Billing Manager* section but cannot view *Network Eye* section.
3. **Help Desk Administrator:** This role can access only Help Desk section of the system.
4. **Network Administrator:** This role can access only *Network Eye* section.

You cannot edit default roles but you can create new roles and assign them to your staff members.

To create a new role, click **Add New Role** button.

Staff Roles

Staff roles define privileges assigned to the Staff member.

To add new staff roles, navigate to the following path:

> 🔍 **Navigation: Home » System Configuration » System Users » Staff roles**

To create a new role, click **Add New Role** button and follow the instructions below:

1. **Role Name:** Enter the name for this role.
2. **Role Description:** Enter some description here.
3. **Is sub reseller:** Select this option if you want to use this staff user as a sub-reseller.
4. **Features Access:** Click the check boxes to define which system areas this role can access. Click '+' to expand for sub-features of each module.
    i. Billing Manager
    ii. Customer Manager
    iii. Service Director
    iv. VPS Hosting
    v. Active Directory
    vi. Dynamics CRM Hosting
    vii. Web Hosting
    viii. Import Utilities
    ix. System Configuration
    x. Exchange Hosting
    xi. Work Folders Hosting
    xii. RDS Hosting
    xiii. Skype4B Hosting
    xiv. Microsoft CSP
    xv. SharePoint Hosting
    xvi. Mimecast

Click **Save** button when finished.

IP LockDown

IP LockDown define privileges assigned to the Staff member. To lock an IP, navigate to the following path:

Navigation: Home » System Configuration » System Users » IP LockDown
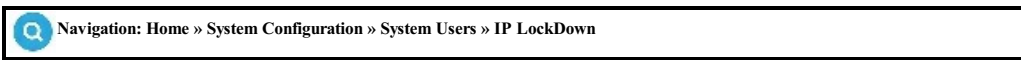
There are the following options for IP lock.

1. **IP LockDown for the staff:** Check this option to enable lock for staff and click on **Save** button.
2. **IP Addresses:** Add IP addresses and click on **Save** button.

Note: You will not able to login from any other IP if IP LockDown is enabled.

How Does Licensing Work?

Control Panel licenses are activated from central licensing servers. Control Panel periodically connects with licensing server to validate your installed licenses. Once license is validated a local key is generated and your software continues working. During the time local key is valid your software will continue working without dependence on the license server.

You have to make sure that outgoing HTTPS calls are allowed from the Control Panel server. If Control Panel is unable to connect to licensing server for over 7 days then it may seize functioning.

If Control Panel primary license server goes down, it will try to backup license server automatically. License servers are geographically distributed and independent of each other.

Updating License

Each Control Panel installation is identified by a unique Installation ID which is a 20 digit alpha-numeric number in **xxxx-xxxxx-xxxxx-xxxxx** format. When you place order (license, upgrades, SSA etc) you will be asked for your Installation ID. Upon completion of your purchase your software license will automatically update. You can also update your license manually.

To manually update Control Panel license navigate to the following path:

Navigation: Home » System Configuration » License Management

Click the **Update License** button.

You can view your Installation ID.

1. **License:** It shows the Licence related to its module such as CAL, MAL etc
2. **License ID:** It shows the License ID for e.g. EjadSPMRs-D7B658E6CB.
3. **Status:** It shows the statue of the license for e.g. Active.
4. **Expiry:** It shows the expiry date.
5. **Total:** It shows the total number of licenses.
6. **In Use:** It shows the number of licenses in use.
7. **Available:** It show the number of available licenses.

Extensive Logging

By enabling "Extensive logging" on Control and Remote servers, it will generate logs for each step involved in a particular operation, such as create an AD user or create mailbox etc. Extensive logging is enabled for some of the critical operations and/or operations that have multiple steps and perform multiple operations on backend as well as on database.

Following types of logging options are available.

1. Advanced logging enabled
2. Log HTTP Requests and Responses
3. Billing service logging enabled
4. Help desk service logging enabled
5. License service logging enabled
6. Provisioning service logging enabled
7. You can delete files from control and remote servers after selected number of days.

Click **Save** when done.