

# Next Generation Hosting Automation, Billing & Management Software

## Introduction to Provisioning System

### Operations Manual

 Customer Control Center

## Enterprise Web Hosting

### Operations Manual

 Orchestration Module for Microsoft Exchange

 Orchestration Module for Microsoft SharePoint

 Orchestration Module for Microsoft CRM

 Orchestration Module for Microsoft Skype4B

 Orchestration Module for Microsoft CSP

 Orchestration Module for VPS

 Orchestration Module for Windows Work Folders

 Orchestration Module for RDS

## Shared Web Hosting

### Operations Manual

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Orchestration Module for MS Hyper-V



Orchestration Module for Work Folders



Orchestration Module for RDS

## Shared Web Hosting

### Operations Manual



Orchestration Module for Web Hosting

## **Preface**

This guide is intended for end customers. It provides an illustration showing how to use Customer Control Center (CCC) and its array of rich features. It will help you carry out necessary setup and essential configuration settings 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 <b>ENTER</b> key
Navigation	Item name with bold	<b>File &gt;&gt; Open</b>
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 <b>General</b> tab
Important or Special note	Bold and underline (Note)	<b><u>Note:</u></b> This is an important note

## Control Panel Provisioning System

Control Panel is an **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.

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

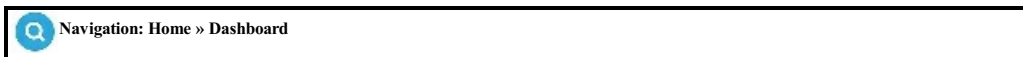
## Customer Control Center

Client 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.

1. **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.
2. **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.

## Viewing Dashboard

To view dashboard navigate to the following path:



You can view following on dashboard:

1. Customers can edit profile and change password anytime. Place the cursor on top right corner which shows customer name is logged in as customer. You can view following options
  - i. Profile
  - ii. Change Password
  - iii. Two Factor Authentication
  - iv. Logout
2. Customers can also change Skin color by clicking on brush icon on top right corner.
3. Customers can also Search Subscription, User email by clicking on search icon on top right corner.
4. Customers can also Search navigation to a particular page from Left pane.
5. Customers can subscribe service for their own use and to resell to their End Customers bu selecting one of following and select service.
  - o Subscribe Service
6. Customers can also view total number of Subscriptions, Invoices, Payments, Open Tickets and view Usage Reports.

## Accessing Your Control Panel Customer Control Center

To access your Control Panel Customer Control Center (CCC), follow these steps:

1. Open your web browser (e.g., Internet Explorer, Firefox, etc.) and enter the URL provided by your service provider in the address bar.
2. Press **ENTER** or click the **Go** button on your web browser.
3. The Control Panel CCC login screen will appear.
4. Log in:
  - i. Enter your email address (e.g., john@ControlPanel.com) in the Login box.
  - ii. Enter the password provided by your service provider in the Password box.
5. Choose your preferred language from the **Language** drop-down list.
  - If it's your first time, you can skip this step; the system default language will be used.
6. Click the **Log in** button.
7. You now have access to the Control Panel Customer Control Center, where you can view and manage the functions available for your account with a comprehensive 360-degree interface.

**Note:** If third party or 2FA authentication is configured, you may be prompted to enter details such as a PIN.

## 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 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. **First Name:** You can change first name
2. **Last Name:** You can change last name.
3. **Customer Number:** Edit customer number
4. **Company name:** You can change company name.
5. **Address:** You can change address.
6. **City:** You can change city.
7. **State/Province:** You can change province
8. **Country:** You can change country.
9. **Zip/Postal code:** You can change zip code.
10. **Phone:** You can change phone number.
11. **Is Taxable:** Check box
12. **Fax:** Provide fax number
13. **Mobile:** You can change mobile number
14. **Alternate email:** Provide alternate email.
15. **Locale:** Select locale
16. **Time zone:** Select time zone.
17. **Language:** Select language.
18. **Authenticate via AD account:** Select user to authenticate via AD account
19. **2FA Enabled:** Check this box to enable two factor authentication.

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.

## Subscribe Service

To subscribe service navigate to the path:



Navigation: Home » Dashboard

Click on the service you want to subscribe.



Navigation: Home » Dashboard » Subscribe service

These are the step for subscribing a service.

1. Select the desired billing currency from the drop down list.
2. Fill in the compulsory fields and then click on the **Shopping Cart** button.
3. Then click on **Place Order** button.
4. Make Payment or pay later.

## Contact Information

Complete contact detail for the client is maintained by Control Panel. Client contact information can be viewed by navigating to:



Navigation: Home » Contact Information

You can also edit the **Primary Contact** information by clicking the **Edit** button. Clicking the **Update** button will simply update the respective field information.

Fill in the following fields

1. **First Name:** This the First name.
2. **Last Name:** This is the last name
3. **Company name:** This show the company name.
4. **Address:** This shows the address of primary contact
5. **City:** This show the city.
6. **State/Province:** This shows the state/province.
7. **Country:** This shows the country.
8. **Zip/Postal code:** This shows the Zip code.
9. **Phone:** This shows the 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. **Fax:** This shows fax number.
12. **Mobile:** This shows mobile number
13. **Alternate email:** This shows the alternate email.
14. **Locale:** This shows locale.
15. **Time zone:** This shows the time zone.
16. **Language:** This shows the language.
17. **2FA Enabled:** Check this box to enable two factor authentication.
18. **Authenticate via AD account:** Check this box to authenticate via AD account.

## Add Contact

You can add and manage your contacts and allow access to your panel by navigating to:



Navigation: Home » Contact Information

Select **Contacts** tab and click **Add Contact** button. Click **Edit** to edit existing contacts.

1. **First Name:** Provide First name.
2. **Last Name:** Provide last name
3. **Address:** Provide address of contact
4. **City:** Provide the city.
5. **State/Province:** Provide state/province.
6. **Zip/Postal code:** Provide Zip code.
7. **Country:** Provide country.
8. **Phone:** Provide the phone number.
9. **Fax:** Provide fax number.
10. **Mobile:** This shows mobile number
11. **Email Address:** Provide email address.

### Allow Access to Control Panel

1. **Allow Access to Control Panel:** Check this box to allow access to panel
2. **Password:** Provide password to login to panel.
3. **2FA Enabled:** Check this box to enable two factor authentication.
4. **Authenticate via AD account:** Select user to authenticate via AD account
5. **Access Template:** Select Permission/access template.

Click **Save** when done.

## Access Template

An Access Template comprises of set of rules which would Allow/Disallow certain features to a contact. A Default Contact Template is already defined.

You can add/edit Access template for contacts by navigating to:



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

A template can be edited by clicking on **Edit** link and a template can be deleted by clicking on the **Delete** link.

## Billing History

You can view complete billing history. Information regarding different Document types is enlisted here. To view billing history, navigate to following path:



Navigation: Home » Billing Information » Billing History

Click on **Document type** or **Document number** to view details. Here you will find all billing documents related to this account.

## Pay Bills

You can pay your bills through different payment methods e.g. online payments/credit cards etc. Please navigate to following path to view outstanding invoices and make payments:



Navigation: Home » Billing Information » Pay Bills

You can select multiple invoices and pay right away. Documents waiting for payment:

1. **ID:** It is the ID of the document.
2. **Type:** It shows the type of the document e.g. invoice.
3. **Total:** It displays the total amount.
4. **Balance:** It displays the balance amount in specified currency.
5. **Due Date:** It shows the due date.

Select the document / invoice(s) you wish to pay and click **Continue** button to make payment.

## Payment Profile

You can add credit card information within your payment profile by simply clicking on the **Add Credit Card** button.

 Navigation: Home » Billing Information » Payment profile

[Click here](#) to see how to add a credit card.

## Add Credit Card

Adding credit card is to smooth line the payment process for the 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 Control Panel.

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

 Navigation: Home » Billing Information » Payment Profile

Click on **Add Credit Card** button. It will land to the following page:

 Navigation: Home » Billing Information » Payment Profile » New Payment Profile

Select customer for which you want to add credit card.

### Credit Card Information

1. **Cardholder name:** Enter customer/card holder name.
2. **Type:** Select type of the credit card e.g. Visa, MasterCard, American Express, Diners Club, JCB, Maestro etc.
3. **Card Number:** Enter card number.
4. **Expiration month:** Select expiry month duration.
5. **Expiration year:** Select expiry year duration.
6. **CVV2 or CVC2 code:** Enter code.
7. **Issue number (Solo/Switch Only):** Enter issue number.
8. **Card status:** Select status as Ok, UnChecked, Disabled, Expired or Error.
9. **Allow payment by this card:** Select Yes/No.
10. **Use this card for recurring payments:** Select Yes /No .

### Credit Card Billing Address

Enter Credit card billing address information as Address1, Address2, City, State, Province, Country, Zip code, Phone, Mobile phone, Fax, Email and Comments.

Finally, click on **Save** button for changes to take effect.

## Estimated Usage Report

Estimated Usage Report report shows estimated Azure Bill for CSP subscriptions. To view navigate to following path:

Navigation: Home » Billing Information » Estimated Usage Report

You can search your estimated usage report by any of the following:

1. Select **Product Type**
2. **Subscription Name**: Provide subscription name.

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

### How to Calculate Estimated bill?

You can calculate Azure Estimated bill for each subscription navigating to the following path and clicking on the **subscription ID** you wish to calculate.

Navigation: Home » Subscriptions » All Subscriptions

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.
2. **Estimate calculated at**: It shows estimate calculated at:
  - i. **Calculate Now**: Click to calculate now.
  - ii. **Detail**: Click to review details. It will open a new tab Estimated Usage Report showing detail per tenant >

The path for Estimate detail is as below:

Navigation: Home » Billing Information » Estimated Usage Report » Estimate Detail

## Billing Subscription Report

Billing Subscription report shows detailed billing for per subscription.

Navigation: Home » Billing Information » Subscription Report

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

1. **Subsc.ID:** Provide subscription id.
2. **Domain Name:** Provide domain name.
3. **Package:** Provide package.
4. **Company name:** Provide company name.
5. Select **Product Type**.
6. Select **Status**.

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

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.

## All Subscriptions

Control Panel creates a subscription for each service ordered. A client may have one or many subscriptions depending on services ordered. For viewing the complete list of subscriptions, navigate to:



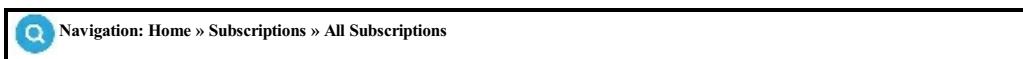
Navigation: Home » Subscriptions » All Subscriptions

The list of subscriptions displays the following:

1. **Subsc. ID:** This is unique ID assigned to the subscriptions.
2. **Subscription Name:** This is the subscription name.
3. **Service Type:** This indicates the type of service this subscription is created for.
4. **Start Date:** It shows the start date.
5. **Next Renewal:** It shows the next renewal .
6. **Status:** Indicates current status of the subscriptions.
  - i. **Active** - Indicates a completed subscription with order paid and service provisioned.
  - ii. **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**.
  - iii. **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.
  - iv. **Graced** - Indicated an expired subscription which is given grace period before deletion.
  - v. **Expired** - The subscription has been expired.
  - vi. **Deleted** - The subscription was expired and later deleted. No further operations are possible on this subscription.

## Subscription Detail

You can view all the details of products/services by navigating to the following path:



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 Manage, Generate Renewal Invoice and upgrade/downgrade.
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:

- **Limits:** It shows the following listings:
  - a. Resource name
  - b. Allocation
  - c. Net Allocation
  - d. Utilized
  - e. 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.

**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 hosting** you will also see the [Exchange Organizations](#) tab along with General Info, Resources, Add-ons and Billing tabs.
2. For **SharePoint Hosting** you will also see the [Organizations/Portals](#) tab along with General Info, Resources, Add-ons and Billing tabs.
3. For **CRM hosting** you will also see the [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 **Skype4B Subscription**, you will see [Skype4B Organizations](#) tab along with General Info, Resources, Add-ons and Billing tabs.
6. For **VPS Subscription**, you will see [VPS Servers](#) and [IP Settings](#) tabs along with General Info, Resources, Add-ons

and Billing tabs.

7. For **CSP Subscription**, you will see [Subscriptions](#) tab along with General Info, Resources, Add-ons and Billing tabs.
8. For **Work Folders hosting**, you will see [Organizations](#) and Work folders 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.

## Expiring Subscriptions

To view Expiring Subscriptions you have to navigate to the following path:



Navigation: Home » Subscriptions » Expiring Subscriptions

Expiring subscription can be searched by:

1. **Subsc.ID:** It is the unique ID for the expired subscription.
2. **Domain Name:** It shows the domain name.
3. **Service Type:** The following are the types of the services:
  - i. Domain Name Products
  - ii. Shared Hosting
  - iii. Microsoft Exchange
  - iv. Dynamics CRM Hosting
  - v. SharePoint Hosting
  - vi. Skype For Business Hosting
  - vii. VPS Hosting
  - viii. Microsoft CSP
  - ix. Work Folders Hosting
  - x. RDS Hosting
  - xi. Dedicated Server Hosting
  - xii. SSL Products
  - xiii. Misc. Hosting
4. **Status:** Status shown is **Graced**.

Then click on **Search** button.

## Expired Subscriptions

Subscription that have not been paid and have expired are enlisted on a page that can be viewed by navigating to:



Navigation: Home » Subscriptions » Expired Subscriptions

Expired subscription can be searched by :

1. **Subsc.ID:** It is the unique ID for the expired subscription.
2. **Domain Name:** It shows the domain name.
3. **Service Type:** The following are the types of the services:
  - i. Domain Name Products
  - ii. Shared Hosting
  - iii. Microsoft Exchange
  - iv. Dynamics CRM Hosting
  - v. SharePoint Hosting
  - vi. Skype For Business Hosting
  - vii. VPS Hosting
  - viii. Microsoft CSP
  - ix. Work Folders Hosting
  - x. RDS Hosting
  - xi. Dedicated Server Hosting
  - xii. SSL Products
  - xiii. Misc. Hosting
4. **Status:** Status shown is **Expired**.

Then click **Search** button.

## 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:
  - i. Shared Web Hosting
  - ii. Exchange Hosting
  - iii. SharePoint
  - iv. CRM
  - v. Skype for Business
  - vi. Work Folders Hosting
  - vii. RDS Hosting
  - viii. Microsoft CSP
  - ix. 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.

## 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:



## Exchange mailboxes

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

## Usage Reports

To view Usage Reports you have to navigate to the following path:

Navigation: Home » Service Director » General » Reports

You can view **Usage report** by clicking on the name of the desired report. It displays usage report based on type of service(s) subscribed by the customer.

### 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

## Audit Logs

A log of changes and have complete details of each action performed in control panel by the customer/user/client with the Date and Time and IP address. Now Control Panel 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:



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.

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.

## Active Directory Organizations

Active Directory Organizations are organizations created by Control Panel on the selected active directory domain. Control Panel gives the customer option to view organization unit.

Later, when the organization requests for any service, you can enable services on the existing organizations.

To view Organizations navigate to the following path:



To search an active directory organization:

1. **Organization Name:** Enter organization name.
2. **Domain Name:** Enter domain name.
3. Select Service enabled

Then, click **Search** button.

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. **Organization Internal Name:** It shows the internal name of the organization.
3. **Users:** It displays the number of users in organization.
4. **Details:** It shows following details:
  - i. **Active Directory Domain:** It is active directory domain name under which this organization exists.
  - ii. **ADSync Enabled:** It shows Yes or No.
  - iii. **ADSync Template:** It shows the ADSync template name.
  - iv. **Subscriptions:** It shows the Yes or No.
  - v. **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 perform following from options:
  - i. **Add User:** Add an active directory user an enable services like Exchange, Skype for Business etc.
  - ii. **Add Bulk Users:** Add bulk ad users.
  - iii. **Update Bulk Users:** Update Password in bulk for AD users.
  - iv. **Enable/Disable ADsync:** Enable or disable ADSync for an organization.
  - v. **Sync from Backend:** This option will sync active directory organizations, users and security groups from backend active directory server.
  - vi. **Security Group:** Add security groups for an active directory organization.
  - vii. **Remove:** You can remove an organization if there is no active service like Exchange.
  - viii. **Settings:** Provide default AD user password settings.
  - ix. **Password Policies:** Create and assign new password policies.

## 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:



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. **Assigned To Users:** It shows the number of Users assigned.
5. **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

Click **Save** when done.

## Add 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

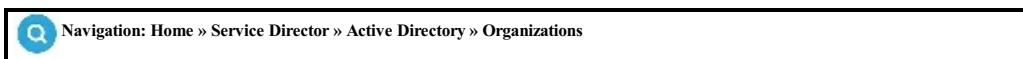
Click **Add Security Groups** to add a new Security Group

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.

## 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 **Password Policies**.

### 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.

## Viewing Active Directory Users

To view users navigate to the following path:



To search **Users**,

1. **Active Directory Domain:** Enter active directory domain.
2. **Organization Name:** Enter organization name.
3. **Display name:** Enter display name.
4. **Customer Name:** Enter the name of the customer.

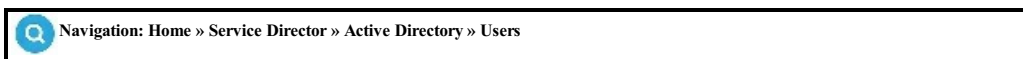
Then click on **Search** button.

You can [Add User](#), [Add Bulk Users](#) and [Update Bulk Users](#). 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:
  - i. **Logon Name:** It shows logon name.
  - ii. **Organization Name:** It displays Organization name.
  - iii. **Logon Hours Template:** It shows if logon hour template is assigned.
4. **Subscriptions:** It shows the subscriptions for e.g. Ex, Skype4B, CRM etc.
5. **Options:** It shows following option for AD user
  - i. Edit
  - ii. Clone
  - iii. Change Password
  - iv. Disable
  - v. Unlock
  - vi. Remove

## Add Active Directory User

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. **Organization Unit:** Select organization unit from dropdown list.
2. **First Name:** Enter first name of the user
3. **Last Name:** Enter last name of the user.
4. **User Display Name:** Enter user display name.
5. **User Principal Name:** Enter user principal name.
6. **Email:** Enter email of the user.
7. **Password:** Enter password.
8. **Confirm password:** Retype password.
9. **2FA Enabled:** Check box to enable two factor authentication.

### Optional Settings

Click plus (+) sign to expand the Optional Settings. You can provide the AD user profile information such as Firstname, Lastname, Profile picture etc.

### Password Settings

Click plus (+) sign to expand the Password Settings. You can set password policy for each domain, select one of the option below:

1. User must change password at next logon
2. User cannot change password
3. Password never expires

### Group Membership

Click plus (+) sign 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. Click **Add Mailbox** checkbox.
2. **Select Template:** Select Mailbox template from the dropdown list.
3. **Primary email:** Provide primary email address.
4. **Mailbox type:** Select the type of mailbox: User, Linked, Shared, Room, Equipment etc.
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 Size (in MB):** This is visible only when mailbox template "Custom" is selected. 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.
10. **Language:** Select locale of mailbox.
11. **Time zone:** Select time zone.
12. **Alternate email:** Provide alternate email for AD user self-service to reset passwords forgotten password.
13. **Hide from Exchange Address Lists:** Check box to hide.

### Distribution List Membership

Click plus (+) sign to expand the distribution list membership. Select distribution list(s).

1. **Send Email:** Select checkbox.
2. **Send email to:** Provide email address.

Click **Save** when done.

## Add Bulk AD 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 » Users

Click **Add Bulk User** button to add users in bulk.

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.
5. **Send AD user create email to alternate email:** Checkbox

Click **Save**.

## Update Bulk Users (AD)

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

Navigation: Home » Service Director » Active Directory » Users

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.

## 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.

## AD 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.

## 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 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 end users make it even easier to manage web hosting service.

**Note:** Please make sure you have subscribed to Orchestration Module for Web 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.

## Hosting Accounts

Navigating to the following path will display shared web & data hosting accounts:



Click on **Manage** link for any account to show options to manipulate and manage corresponding hosting account.

The list displays the following:

1. **Status:** It shows the status of hosting account.
2. **Subscription ID:** This is unique ID assigned to the subscriptions.
3. **Domain Name:** The name of domain.
4. **Package:** It shows the package.
5. **Customer ID:** It shows customer ID.
6. **Options:** Click on Manage to [manage hosting name service](#).

## Hosting Accounts Overview

Under Hosting Accounts click on **Manage** for any account to show options to manipulate and manage corresponding hosting account.

Navigate to the following path:

Navigation: Home » Service Director » Hosting Accounts

You will be on following navigation path after clicking on Manage link:

Navigation: Home » Service Director » Hosting Accounts » Manage Service

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. It 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:** Allows you to manage following aspects:

<b>Turn On/Off</b>	Lets you turn the domain On/Off.
<b>Sub-Domains</b>	Lets you add new sub domain and manage the existing ones.
<b>Domain aliases</b>	Lets you add new domain aliases or manage the existing ones.
<b>Limits</b>	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:

<b>Website Settings</b>	You can configure website settings related to permissions, authentication, application pool and performance.
<b>Default Documents</b>	Lets you manage default document in IIS for the domain being managed.
<b>URL Redirection</b>	Lets you set Redirection (physical redirection or http redirection) for the domain being managed.
<b>Custom Errors</b>	Lets you set custom errors for the domain being managed.
<b>MIME Types</b>	Lets you add MIME Types on the domain being managed.
<b>Virtual Directory</b>	Lets you create virtual directory under the domain being managed.
<b>Scripting</b>	Lets you activate/deactivate different scripting languages like ASP, ASP.Net, PHP, Python, Perl, Cold Fusion on the domain being managed.
<b>FTP Users</b>	Lets you add/remove FTP Users on the domain being managed.

<b>Databases</b>	Lets you add/remove/manage MSSQL and MYSQL databases and their users on the domain being managed.
<b>ODBC DSN</b>	Lets you manage ODBC DSN on the domain being managed.
<b>File Manager</b>	Lets you manage File Manager on the domain being managed.
<b>Website Stats</b>	Lets you view/manage Website Status on the domain being managed.
<b>DNS</b>	Lets you manage DNS on the domain being managed.
<b>Shared SSL Links</b>	Lets you manage SSL Links on the domain being managed.

**Email Management:** The Email Management section allows to manage Email accounts with shared hosting

<b>Turn On/Off</b>	Lets you turn the mail domain On/Off.
<b>Mail Domain Alias</b>	Lets you manage Mail Domain Aliases on the domain being managed.
<b>Email Accounts</b>	Lets you manage Email Accounts on the domain being managed.
<b>Email Lists</b>	Lets you create/remove email lists on the domain being managed.
<b>Email Groups</b>	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** link. 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 » Subscriptions » All Subscriptions

You will be able to view details of the subscription you have clicked and perform various operations on subscription.

## 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:** Here Service Management, Delete and Assigned dedicated IP links are provided.

Click on **Add New Domain** button to add a new domain to shared hosting.

### Allow Posting To

1. **Domain Name:** Provide domain name.
2. **Activate mail service:** Check or uncheck it.
3. **Subscribe to:** Select from the drop down list Physical web hosting or URL forwarding.

Then click on **Save** button.











## 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:

 Navigation: [Home](#) » [Service Director](#) » [Web Hosting](#) » [Accounts](#)

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.

## Manage DNS Zones

To manage DNS zones for DNS Only subscriptions navigate to the following path:



Navigation: Home » Service Director » Web Hosting » Accounts

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

For displaying the summary of services that you can manage navigate to the path:

Navigation: Home » Service Director » Web Hosting » Accounts

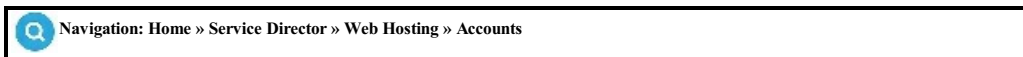
Click on **Manage** in front of the subscription.

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:



Now 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.

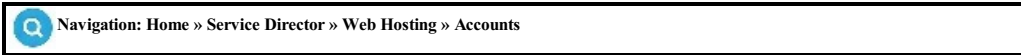
"Service is Running. Would you like to Stop it?"

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** link:



Click **Manage** and select **Subscriptions Only** tab. 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.

## 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:



Click **Manage** and select **Subscriptions Only** tab. 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:



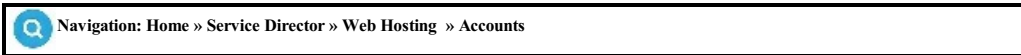
Navigation: Home » Service Director » Web Hosting » Accounts

Click **Manage** and select **Subscriptions Only** tab. 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. **Allow anonymous access:** Allows anyone to visit the public areas of website.
6. **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.
7. **Enable basic authentication:** Collects user name and password and send in an unencrypted form.
8. **Application Pool:** Name of the application pool that contains one or more applications run.
9. **Maximum CPU Usage:** Mention percentage for peak utilization of System CPU.
10. **Maximum Network Use (KB/S):** Enter network bandwidth usage.
11. **Connection limited to:** Specify connection limitation.

## 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:



Click on the **Default Documents** link 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:



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** and **Susbcrpitions Only** tab. Click on the **Custom Errors** link 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** link 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.
  - a. Absolute path
  - b. Executable path
  - c. Url

Click on **Save** button to save changes. Clicking on **Set to Default** link 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:



Click **Manage** and select **Subscriptions Only** tab. Click on the **MIME Types** link 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:

 Navigation: [Home](#) » [Service Director](#) » [Web Hosting](#) » [Accounts](#)

Click **Manage** and select **Subscriptions Only** tab. Click on the **Virtual Directory** link 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** and select **Subscriptions Only** tab. Following scripting languages are supported:

1. ASP Support
2. ASP.NET Support
3. PHP Support
4. Perl Support
5. Python Support
6. ColdFusion Support
  - i. **Installed:** Shows the status if the support for the specific scripting language is installed or not.
  - ii. **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:



Navigation: Home » Service Director » Web Hosting » Account

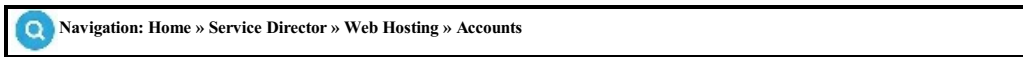
Click **Manage** and select **Subscriptions Only** tab. Click on **Add FTP User** to create a new FTP user.

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 on the **Databases** link 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 .
2. **Database Name:** Specify instance name for database.
3. **Database User:** Add respective database user.
4. **Database User roles:** Assign specific role to database user.

Click **Save** button to update changes.

You can also click **Database Users** tab to configure database users.

## ODBC

For ODBC configuration navigate to following path and click on the **ODBC DSN** link to get to this option:




Click **Manage** and select **Subscriptions Only** tab. Click the **Add ODBC DSN** button to add new ODBC DSN.

1. **Data source name:** Enter string for data source.
2. **Driver:** Specify your preferred driver for database connectivity.
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:

 Navigation: Home » Service Director » Web Hosting » Accounts

Click **Manage** and select **Subscriptions Only** tab. Click **File Manager**.

### Operations In File Manager

Following Operations can be performed in File Manager:

1. Sync
2. Add Folder
3. Create Text file
4. Copy Files
5. Move Files
6. Rename Folder
7. Delete Folder/Files
8. Upload/Download
9. Zip/Unzip

#### 1.1.1 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

#### 1.1.2 Add Folder

Click on Add a Folder icon to add a new folder. You can also add folders inside a folder.

#### 1.1.3 Create Text File

Select Folder and click on Create Text File icon. You can also Edit and preview Text file.

#### 1.1.4 Copy Files

Select File to copy and click on Copy Folder(s) / File(s) icon.

#### 1.1.5 Move Files

Select File to move and click on Move Folder(s) / File(s) icon. Select folder from tree list to move files.

#### 1.1.6 Rename

Select File to rename and click on Rename icon.

#### 1.1.7 Delete Folder(s)/File(s)

Select Folder(s)/File(s) to be deleted and click on delete Folder(s)/Files(s) icon.

#### 1.1.8 Upload/Download

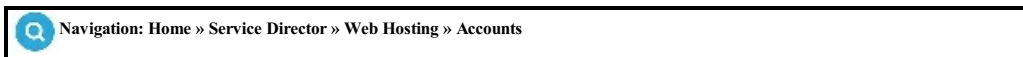
Select Folder /Files and click on Upload / Download icon.

#### 1.1.9 Zip/Unzip

Similarly, Select Folder /Files and click on Create Zip/UnZip icon.

## Website Stats

To view Website Stats navigate to the following path:



Click **Manage** and select **Subscriptions Only** tab. Click on **Website Stats** service control.

You can add, view or delete website stats by clicking on **Add Website Stats** button, **view** link or **remove** link respectively.

## DNS Record

For DNS configuration navigate to following path:



Navigation: Home » Service Director » Web Hosting » Accounts » Manage

Click on the **DNS** link to get to this option. 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.

## 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:



Navigation: Home » Service Director » Web Hosting » Accounts

Click **Manage** and select **Subscriptions Only** tab. 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.

## Email Management

Please navigate to following path to access Email Management section:

Navigation: Home » Service Director » Web Hosting » Accounts

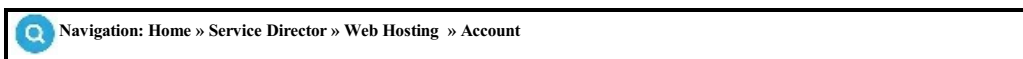
Click on **Manage** in front of "Hosting account" or "Mail Only Subscriptions".

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](#)

## Mail Domain Alias

For listing the aliases of mail domains 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



## E-mail Accounts

Please follow the below mentioned navigation path for listing and configuration of e-mail accounts:

 Navigation: Home » Service Director » Web Hosting » Accounts » Manage

It shows the following listing:

1. **E-mail:** E-mail address assigned to that e-mail account.
2. **Size:** Usage space or e-mail quota.
3. **Status:** Shows particular state associated with the account.
4. **Options:** Different choices to manipulate upon the e-mail account.

For creating new e-mail account click on **Add Email Account** button.

1. **Display Name:** Title of the e-mail account.
2. **E-mail Account:** E-mail address assigned to that e-mail account.
3. **New Password:** Enter password for current e-mail account.
4. **Confirm Password:** Re-enter same password for confirmation purpose.
5. **Mailbox Size (KB):** Usage space or e-mail quota.
6. **Enabled:** Check to activate the account.

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:



Navigation: Home » Service Director » Web Hosting » Accounts

Click **Manage** in front of "Hosting account" or "Mail Only Subscriptions". Click on **Email Lists** service control under **Email Management**.

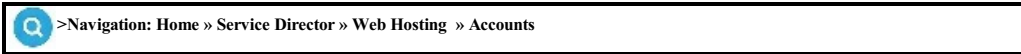
You can create new email lists by clicking on **Add Email List** button.

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 the following path:



Now click **Manage** in front of "Hosting account" or "Mail Only Subscriptions".

Click on **Add Email Group** button. 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:
  - i. Manage Databases
  - ii. 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:



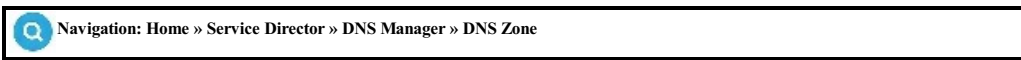
Navigation: Home » Service Director » Web Hosting » Accounts

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](#).

## 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.

You can **Add Bulk DNS Zones** and **Add Bulk DNS Zones with Redirect Rules**

It displays the following listings:

1. **Status:** It shows the status of dns zone.
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:



Navigation: Home » Service Director » DNS Manager » DNS Zones

Click **Add Bulk DNS Zones** and provide following:>

1. **Upload CSV (one domain per line):** Select file
2. **Enter comma separated domain names:** Or Provide comma separated domains.
3. **Select primary DNS server:** Select primary DNS server
4. **Select Name Servers Group:** Select name server group.
5. **Select DNS Template:** Select DNS template.

Click **Save** when done.

## Web Redirect

To add a web redirect rule navigate to the following path:



Navigation: Home » Service Director » DNS Manager » DNS Zones

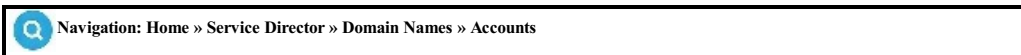
Select **Web Redirect** tab and click **Add Redirect Rule**.

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

When a domain is registered using the control panel, users can avail facility of managing the domain name and perform different operations. Navigating to the following path will display 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. **Manage:** Click on the **Manage** for any account to show options to manipulate and manage corresponding domain name.

It will enlist the detailed information regarding corresponding domain name with following:

**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:

Navigation: Home » Service Director » Domain Names » Accounts

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:

Navigation: Home » Service Director » Domain Names » Accounts

Under **Contacts Management** tab, you will see following listing for contacts:

1. **Contact Details:** It shows contact details save for the contact.
2. **Options:** It shows option to Edit/remove the contact.

To add new contact click **Add Contact**.

1. **Select Registrar:** Select registrar from dropdown list.
2. **Use For:** Select one of the contact is use for.
3. **First Name:** Provide first name of contact.
4. **Last Name:** Provide last name of the contact.
5. **Company:** Provide company name
6. **Email:** Provide email address.
7. **Address:** Provide address.
8. **City:** Provide city.
9. **State/Province:** Provide state/province.
10. **Zip/Postal Code:** Provide zip code.
11. **Country:** Provide country.
12. **Phone:** Provide phone number.
13. **Legal Form:** Select legal form from the drop down list.
14. **Legal form Reg No:** Provide legal for registration number.

Click **Save** when done.

## Pending Verification

To verify pending domains navigate to following path:

Navigation: Home » Service Director » Domain Names » Domain Verification

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:

Navigation: Home » Service Director » Domain Names » Domain Verification

Select **Verified** tab. Under Verified tab verified domains are listed.

## Usage Report (Domain Names)

To view usage report of domain names navigate to following path to access domain names:



Navigation: Home » Service Director » Domain Names » Usage Report

Under **Expiring Domains** tab you will see the following listing:

You can search domain name by following:

1. TLD Name
2. Domain Name
3. Registrar
4. 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. **Registrar:** It shows the registrar in use.
4. **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. TLD Name
2. Domain Name
3. 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. **Registrar:** It shows the registrar in use.
4. **Domain lock status:** It shows domain status.
5. **Owner Email:** It shows owner email address.
6. **Admin email:** It shows admin email address.
7. **Billing Email:** It shows billing email address.
8. **Technical Email:** It shows technical email address.

## Exchange Hosting

Control Panel allows reporting, auditing and specific role based groups in Exchange Hosting. The purpose of this document is to elaborate those specific reporting, auditing and specific role based groups concepts which are being used specifically in Exchange Hosting module and to facilitate you towards friendly adoption of Control Panel environment.

### Reports

You can view Usage Reports for Exchange accounts under **Reports** tab. Click Usage Report to view usage reports.

### Auditing

You can export Mailbox audit logs. To view more details click Auditing.

### RBAC

You can also add Role Groups for your customers. To view more details click RBAC.

## OrchestrationModule for Microsoft Exchange

Control Panel allows Hosted Exchange Service through its Orchestration Module for Exchange.

Control PaneOrchestration 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 Hosted 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 Accounts

To view Exchange accounts navigate to the following path:



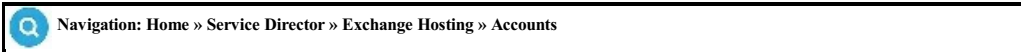
Click on **Manage** for any account to show options to manipulate and manage corresponding exchange account.

The list displays the following:

1. **Status:** It shows the status of exchange account.
2. **Subsc.ID:** It is the unique ID for each subscription..
3. **Mail Domain:** The name of SMTP domain.
4. **Package:** It shows the package name.
5. **MailBoxes:** Total number of exchange mail boxes created in the organization.
6. **Options:** Click on **Manage** to [manage Exchange Server service](#).

## Viewing Exchange Organizations

Exchange organizations are basically mail enabled active directory organizations. To view exchange organizations navigate the following path:



Click on the *Exchange subscription* and 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:** Only Active organizations can be managed.
2. **Organization Name:** The active directory name of the organization. With the name an active directory organizational unit is created for the organization.
3. **Mail Domain:** The primary SMTP mail domain name created for the organization.
4. **MailBoxes:** Total number of exchange mail boxes created in the organization.
5. **Options:** Click on **Manage** to [manage exchange server service](#). Click **Delete** to delete the organization. This operation removes organization's OU from active directory and associated settings from exchange server.

## Hosted Email Service Management

Orchestration Module for 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:



Click on **Manage** for any account to show options to manipulate and manage corresponding exchange account.

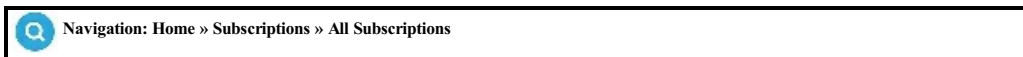
**General info** tab shows the Operations that could be performed on Exchange. You can perform [Export Mailbox Permissions](#), [Sync Data from backend](#), Export Mailbox Forwarding and Update Recipient Settings for each exchange account.

Currently available management modules 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. [Compliance Management](#)
9. [Spam Filters Management](#)
10. [Mobile Device Mailbox Policy Management](#)
11. [Application Impersonation](#)

## Add New Organization

To add a new exchange organization navigate to the following path:



Click on the *Exchange subscription* and 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.

## Export Mailbox Permissions

Control panel can export mailbox permissions to excel sheet. To export mailbox permissions, 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 **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:

Navigation: Home » Service Director » Exchange Hosting » Accounts

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:

- i. Import new mailbox in DB if it is not already there. Supports all mailbox types (User, Linked, Resource)
- ii. Sync General settings
- iii. Sync Email addresses
- iv. Sync Mail-flow settings
- v. Sync Advanced settings
- vi. Sync Permissions
- vii. Sync Mailbox Database
- viii. Sync Personal Archive settings
- ix. Sync Unified Messaging
- x. Sync Automatic replies
- xi. Sync Retention enabled

### 2. Distribution List(s)

- i. Import new Distribution list in DB if it is not already there. Supports all Distribution List types (Simple, Dynamic, Security, Room)
- ii. Sync Distribution List members
- iii. Sync Email addresses
- iv. Sync Advanced settings
- v. Sync Send-As settings

### 3. Mail Contacts

- i. Import new Mail Contact in DB if it is not already there.
- ii. Sync General settings
- iii. Sync Mail-flow settings
- iv. Sync disabled attribute

## 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 **Mail Domains** tab. The list of exchange mail domains displays following:

The list of exchange mail domains displays following:

1. **Default:** The default mail domain is selected by default when creating a new mailbox.
2. **Server Group Name:** Friendly name.
3. **Delete:** Click to delete the domain from accepted SMTP domains list in exchange.

To add a new SMTP domain:

1. **Mail Domain:** This is 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.

## Add SMTP Domain

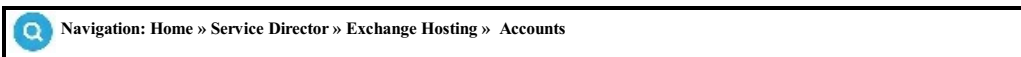
To add an SMTP domain navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **Exchange 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:

Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **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 remove an export bulk failed mailboxes by clicking on **Remove and Export Bulk Failed Mailboxes**. You can also add **Linked AD Settings**:

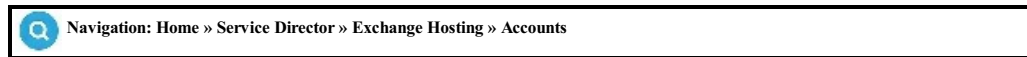
The list of mailboxes displays following:

1. **Mailbox:** The mail box name as it displays in OWA and in from address when sending mail.
2. **Details:** The domain username for this mailbox.
  - a. **Status:** It shows status of mailbox. Only Active mailboxes can send and receive mails.
  - b. **Type:** It shows the type of the mailbox.
  - c. **Usage:** Total mailbox size in MBs.
3. **Options:** It shows the following two options:
  - i. **Enable/Disable Litigation Hold:** Click to enable/disable litigation hold for a mailbox.
  - ii. **Disable:** Click this button to disconnect the mailbox.
  - iii. **Remove:** Click to delete the mailbox from exchange.
  - iv. **Remove and Delete AD user:** This option will remove the mailbox from exchange as well as AD user.
  - v. **PST Export:** This will export mailbox to PST.

## 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:



Click on **Manage** and then select **Mailboxes** 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. **Room mailbox:** Special type of mailbox for reserving rooms etc. [Click here](#) to add a room mailbox.
3. **Equipment mailbox:** Special type of mailbox for equipment. [Click here](#) to add a equipment mailbox.
4. **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.
5. **Shared mailbox:** Special type of mailbox for Exchange 2013. [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.
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 shown 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 distribution lists.

**Send Email Setup:** check this option if you want to send email. Click on the **Save**.

Click on the **Add Mail Box** button when done.

## Linked Mailbox

To add a Linked mailbox navigate to the following path:



Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **Mailboxes** tab. Click on the **Add New Mailbox** button.

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

## Room/Equipment Mailbox

To add a room/equipment mailbox navigate to the following path:



Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **Mailboxes** tab. Click on the **Add Mailbox** button.

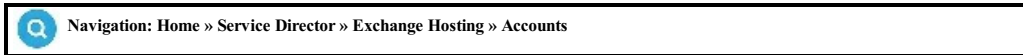
1. **Mail-enable active directory user:** Select the Existing user or create the new one.
2. **Mailbox database:** Select Mailbox Database from the drop down list
3. **Mailbox Size (in MB):** Provide mailbox size in MB.
4. **Full Name (Display name):** Provide the display name of the mailbox.
5. **Primary email:** Provide email address for the account.
6. **Mailbox type:** Select mailbox type **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 **Manage** and then select **Mailboxes** tab. Click on the **Add New Mailbox** button.

Now select **Shared Mailbox**.

The add mailbox screen displays following:

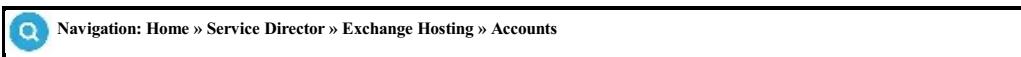
1. **Mail enable active directory user:** Exchange user for which you want to enable the service.
2. **Full Name (Display name):** The mail box name as it displays in OWA and in from address when sending mail.
3. **Primary Email:** The email address for the mailbox. For example, sales.
4. **Mailbox Type:** 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 Size (in MB):** This will be shown if you select **Custom** mailbox Template. You can either select Package/Add-on 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.
10. **Language:** Select locale of the mailbox.
11. **Time Zone:** Select Time zone.
12. **Alternate email:** Specify alternate email.
13. **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 distribution lists.

Click on the **Add Mail Box** button when done.

## Group Actions

To perform Group Actions on mailboxes navigate to the following path:



Click on the **Manage** link 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.
  - a. Disable Archive
  - b. Disable
  - c. Enable
  - d. Remove
  - e. Enable/Disable Litigation Hold
  - f. Enable/Disable Journaling
  - g. Enable/Disable In-Place Hold
  - h. Enable/Disable Audit
3. **General Settings:** The following are the general setting for the mailboxes.
  - i. Select **Template**
  - ii. **Hide from Exchange Address Lists:** Check this option to hide user from Exchange address list and then save it.
  - iii. **Language:** Select the Locale of the mailbox user.
  - iv. Timezone:
4. **Mailflow Settings:** Set the mail-flow settings for the selected mailboxes.
5. **Storage Quotas:** Define the storage quotas for the selected mailboxes.
6. **Mailbox Features:** Define the mailbox and the OWA features of the selected mailboxes.
7. **Distribution Members List:** Select the mailboxes for the distribution members list.
8. Enable Litigation Hold:
9. **Add Email Alias:** Provide the email alias for the selected mailboxes.
10. Update Primary Email:
11. **Personal Archive Settings:** Provide the personal archive settings for the selected mailboxes.
12. Public Folders:
13. Email Forwarding:
14. Calendar Permissions:
15. Grant Permissions:
16. Remove Permissions:
17. Add Email Alias Using CSV:
18. Enable/Update Journaling:
19. Booking Delegates:

## MailBox Settings

To view and manage mailbox 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 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. [Mail Flow Settings](#)
4. [Advanced Storage Quotas](#), [Mailbox Features](#).
5. [Permissions](#)
6. [Set Password](#)
7. [Personal Archive Settings](#)
8. [Unified Messaging](#)
9. [Automatic Replies](#)
10. [Distribution List Membership](#)
11. [Calendar Permissions](#)
12. [Mobile Devices](#)
13. [In-Place Hold](#)

## General

To view and manage General 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 it general Settings as below:

### General Settings:

1. **User:** Provide or change user principal name.
2. **Domain User name:** It shows the domain user name.
3. **Display name:** It shows the users display name.
4. **Mailbox type:** It shows the mailbox type for e.g. Room Mailbox
5. **Managed By:** Select the mailbox type.
6. **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.

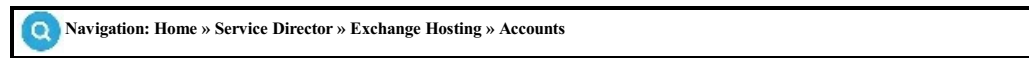
### Organization:

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.

## 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:

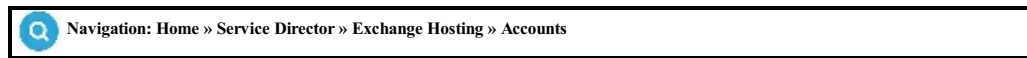


Click on **Manage** and then select **MailBoxes** tab. Click on the mailbox name for which you wish to add email address. Select **Email Address** tab, enter the desired value in **Email Address** box and click on **Add** button.

## 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:

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.

Click on **Save** button when done.

## Set Mailbox Quotas

When a mailbox is first created it inherits the storage and mail quotas from the service plan assigned to exchange organization. In some cases you may want to change storage & mail quotas for individual mailboxes. You may do this easily via web interface.

To change storage & mailbox quotas navigate to the following path:

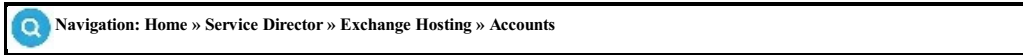


Click on **Manage** and then select **Mailboxes** tab. Click on the mailbox name for which you wish manage the storage and mailbox quota. Now, click on **Mail Flow Settings** and **Advanced** tabs to manage various storage and mail quota options.

## Manage Mailbox Features

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 cases 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:



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.

## 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
2. Send As
3. Full Access

Select mailbox from the drop down list and then click on **Grant Send On Behalf**, **Grant Send As** and **Grant Full Access** button.

## Change Mailbox Password

To change a new mailbox password navigate to the following path:

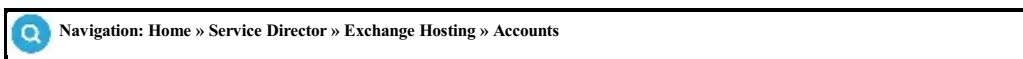


Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **Mailboxes** tab. Click on the mailbox name for which you wish to 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:



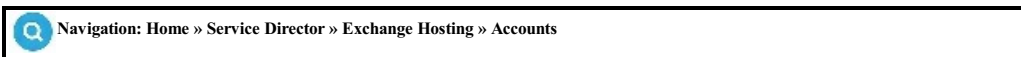
Click on **Manage** and then select **Mailboxes** tab. Click on the mailbox name for which you wish to set archive settings. Click on the **Personal Archive Settings** tab. You will see the following options:

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:

 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 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 Membership

To allow distribution list membership on DL's 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 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:

 Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on the **Manage** and then select **Mailboxes** tab. Click on the mailbox name 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:

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 manage Mobile Devices.

## Enable In-Place Hold

To allow In-Place hold of a mailbox navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **Compliance Management** tab. Now select **In-Place hold** tab.

**In-place hold enabled:** Check this option to enable In-place hold for a mailbox. In-place hold is available for Enterprise and Enterprise Plus mailbox.

## 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:



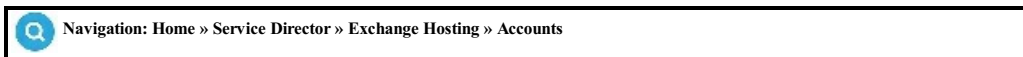
Click on **Manage** link and then select **Mail Contacts** tab. Click on [Add Mail Contact](#) button to add new contact. Click on the **Add Bulk Mail Contact** button to add bulk contacts.

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. **Internal Email:** The internal email address where mails for this contact shall deliver.
4. **Status:** Only Active mailboxes can send and receive mails.
5. **Options:** You have options to **disable** and **delete** the contact.

## Add Mail Contact

To add a mail contact navigate to the following path:



Click on **Manage** and then select **Mail Contacts** tab. Click on the **Add New 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. **Primary SMTP 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. **Hide from Exchange Address List:** Click this checkbox if you wish to hide the email account from Global Access List (GAL).
5. **Optional Fields:** Optional fields may be left blank and filled later.

Click on the **Add Mail Contact** button when done.

Click on the **Add Bulk Mail Contact** button to add bulk contact.

- Browse for CSV file to import all the mail contacts.

Click on the **Add Bulk Mail Contact** button when done.

## Disable Mail Contact

To disable a 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 **Disable** button in front of mail contact you wish to disable.

## Delete Mail Contact

To delete a 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 **Delete** button in front of mail contact you wish to delete.

## 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:



Click on **Manage** link 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.

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. **Options:** Click **Remove** to delete the distribution list.

Click on the name of a Distribution List to manage following for DL.

1. [List Members](#)
2. [Email Address](#)
3. [Advanced](#)
4. [Send As](#)
5. [Send On Behalf](#)
6. [Message Approval](#)

## Group Actions

To perform Group Actions on distribution lists navigate to the following path:

Navigation: Service Director » Exchange Hosting » Accounts » Manage

Select **Distribution List** tab. Click on the **bGroup Actions** button to show options to manipulate and manage groups actions for distribution lists.

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

## Add Distribution List

Mailboxes are mail addresses which are used to send and receive emails.

To add a distribution list navigate to the following path:



Click on **Manage** link and then select **Distribution List** tab. Click **Add Distribution List** button to add a new DL and provide below:

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.

Select the list manager from **Managed By** drop-down list and click **Add** button.

To add bulk distribution list click on **Add Bulk Distribution List** button.

1. **Primary Email:** Enter primary email address.
2. **csv file to import:** Browse to select a csv file.

Click on **Add Bulk Distribution List** button 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:



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, enter the name of new mail address in **Email Address** box and click on **Add** 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:

**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.

## 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:

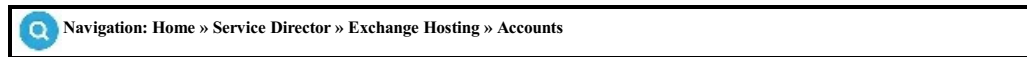
 Navigation: [Home](#) » [Service Director](#) » [Exchange Hosting](#) » [Accounts](#)

Click on **Manage** link 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

Distribution list members receives the email sent to the distribution list. They can also post email message to the list.

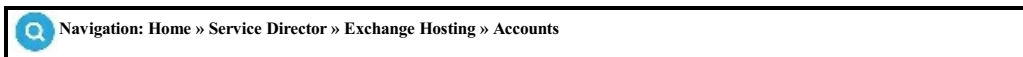
To grant message approval to a distribution list member navigate to the following path:



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 and check option to manage message approval and select the list member from **Mailbox** drop-down list. Click the **Save** button.

## Viewing Public folders

To view Public Folders navigate to the following path:



Click **Manage** and select **Public Folders** tab. To create a new public folder click on [Add Public Folder](#) button.

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.

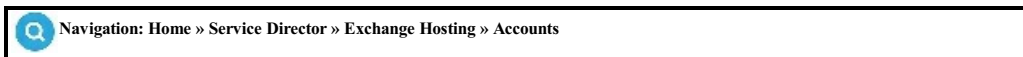
Mail Enable folder shows the following buttons:

1. **General:** You can allow/disallow posting to the public folders. You can also allow\disallow posting to external users.
2. **Add Permissions:** You can [Add Permissions Level](#) of mailboxes on a Public Folder
3. **Email address:** You can also [add email addresses](#) to it.
4. **Mail flow Settings:** You can manage [Email forwarding](#) settings to mailboxes.
5. **Permissions:** You can also adjust [permissions](#) such as **Send on Behalf** and **Send As**.

**Note:** To delete a folder click on **Delete** link.

## Add Public Folders

To Add Public Folders navigate to the following path:



Click on **Manage** and then select **Public Folders** tab.

To create a new folder, click on **Add Public Folder** button. Fill in the required 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.

Then, click **Add Public Folder** button.

## General (PF)

To view and manage general settings of Public Folders navigate to the following path:



Navigation: Home » Service Director » Exchange Hosting » Accounts

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

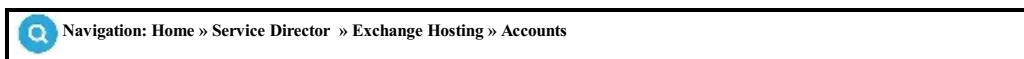
1. **Public folder name:** this shows the name of Public Folder.
2. **Size (MB):** It shows size of a Public folder in MBs.
3. To enable or disable mail on a PF click **Mail Enable/Disable Folder**
4. To allow/disallow posting on external users click **Allow/Disallow posting to external users**
5. To 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:



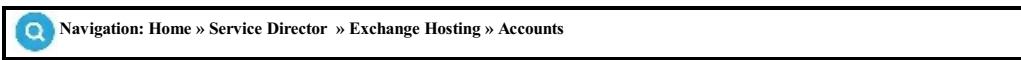
Click **Manage** from options in front of Exchange account and select **Public Folders** tab. Click on a existing Public Folder name or create new. Under **General** tab, click **Add Permissions** button under section "Public Folder Posting":

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**.

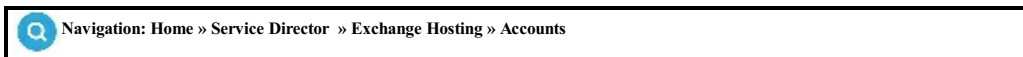
### Add Email Address

**Email Address:** Provide email alias and select domain from the dropdown list.

Click **Add** when done.

## Add 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 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.

Click on **Save** button when done.

## Send Permissions

To manage Send on Behalf and Send As permissions on a Public Folder navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Accounts

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.

## Manage Wireless Service

To manage wireless account navigate to the following path:



Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and select **Mailboxestab**. 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

## 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:



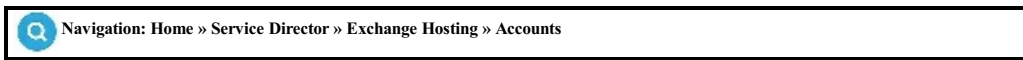
Click on **Manage** and then select **Rules** tab.

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 disclaimer navigate to the following path:



Click on **Manage** and then select **Disclaimer** tab.

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:

Navigation: Home » Service Director » Exchange Hosting » Accounts

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:



Navigation: Home » Service Director » Exchange Hosting » Accounts

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.

## Viewing Retention Settings

To view\add retention policies and tags navigate to the following path:

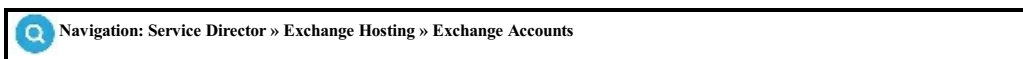


Click **Manage** and select **Compliance Management** tab. It show the buttons to add **Retention Tags** and **Retention Policies**. The list displays the following:

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.

## Adding Retention Policies

To add retention policies navigate to the following path:



Click **Manage** in front of an Exchange account and select **Retention Settings** tab. Click on the **Retention Policies** button to add.

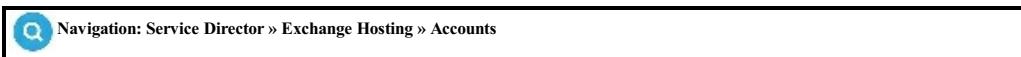
The list displays the following:

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

To add retention tags navigate to the following path:



Click **Manage** in front of an Exchange account and select **Retention Settings** tab. 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.

## 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 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.

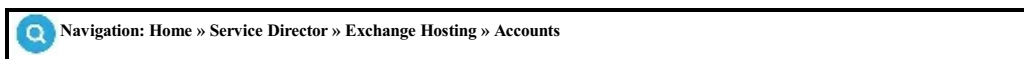
Click **Enable**.

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.

## Journaling

To manage journaling of a mailbox navigate to the following path:



Click **Manage** and select **Compliance Management** tab. Select **Journal Rules** tab to add journaling,

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.

## Managing Spam Filters

To manage spam filter navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Accounts

Click **Manage** and select **Spam** Filters tab and check the following option for the organizations:

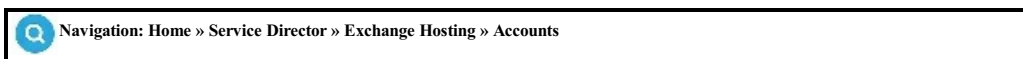
**Enable SPAM filter for:** organizationname.com

1. **Admin email:** Provide the email address for the administration purpose.
2. **Password:** Provide password.

Click **Save** when done.

## Mobile Device Mailbox Policy

To manage mobile device mailbox policy navigate to the following path:



Click on **Manage** and select **Mobile Device Mailbox Policy** tab and check the following option for the organizations:

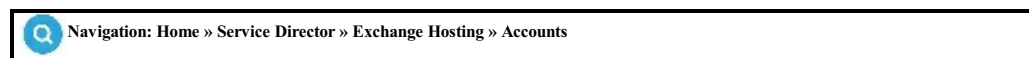
1. **Name:** Provide the name of mobile device policy.
2. **Allow mobile devices that don't fully support these policies to synchronize:** Check this option to enable.
3. **Require a password:** Check if required.
4. **MailBoxes:** Select mailboxes for the policy.

Click **Save** button when done.

## Application Impersonation

The Application Impersonation management role enables applications to impersonate users in an organization to perform tasks on behalf of the user.

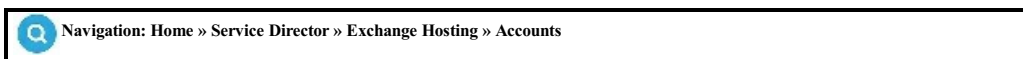
To view application impersonation navigate to the following path:



Click on **Manage** for any account to show options to manipulate and manage corresponding exchange account. Select **Application Impersonation** tab. Select **Mailboxes** and then click **Save**.

## Calendar Permissions for Security Groups

To manage calendar permissions of SG navigate to the following path:



Click on **Manage** link 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, Availability 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.

## PST Exports

To view completed PST Exports navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » PST Exports

You can filter and search by provide following fields:

1. **Organization:** Provide Organization name.
2. **Mailbox:** Provide mailbox.
3. 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.

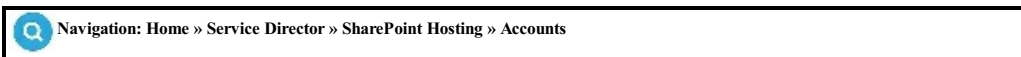
Control Panel Orchestration Module for Microsoft SharePoint fully automates and controls service delivery for Microsoft SharePoint 2019 and its legacy versions, manages billing and provides self service control panel to your customer.

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
9. SharePoint Server Subscription Edition

**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.

## 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. Portal address
4. Portal Title
5. Domain Name

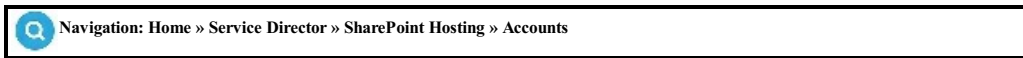
The list displays the following:

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. **Options:** Click on **Manage** link to [manage server 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.

Navigate to following path:

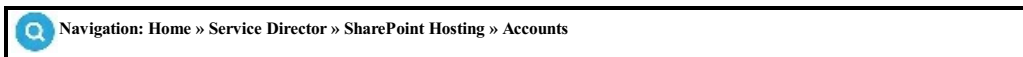


Click on **Manage** link from options. You will see the following tabs.

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 domains](#) to SharePoint.
4. **Permissions level:** 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.

## Viewing SharePoint Portal

To edit SharePoint account navigate to the following path:



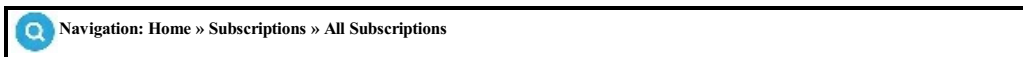
Click on **Manage** and select **SharePoint Portal** tab. [Click here](#) to see how to add new portal/organization.

1. **Domain Name:** It shows the SharePoint domain name for e.g. domainname.com.
2. **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.
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):** Enter maximum storage or quota for site collections.
8. **Send warning e-mail when storage for each portal reaches (MB):** Enter maximum numbers of storage for send warning emails.
9. **Language:** It shows the Locale for e.g. English.
10. **SharePoint:** Click on the **Connect to SharePoint Portal** link to connect.

**Note:** Click on **Edit** button to edit a SharePoint Portal.

## Add new Organization/Portal

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. For e.g. <http://portal.machsol.com>
3. **Title:** This is the SharePoint portal title.
4. **Users:** Total users in the SharePoint portal.
5. **Manage:** Click on this link 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:

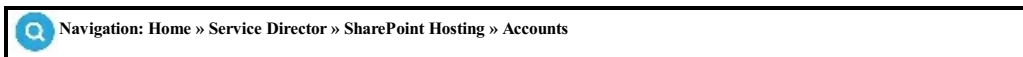
1. **Add new organization:** Select an existing organization from the drop down list or create the new one.
2. **Domain Name:** This must be a valid registered and active domain.
3. **Manager:** Create account for the manager.
4. **Portal address:** Provide portal address. For e.g. *portaladdress.sp-pss-10*.
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 Domain

To add an new SharePoint domain, navigate to following path:



Click on **Manage** 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 Levels

To view/add SharePoint permission level navigate to the following path:



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.

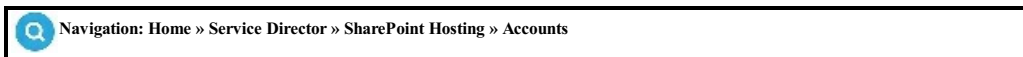
Click on the **Add Permission Level** button to add a new permission level.

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** 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 the group and delete the group from the options column.

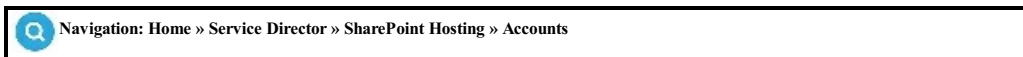
Click on the **Add Group** button to add a new group.

1. **Group name:** Provide the name of the Group.
2. **Description:** Provide the description for the group.
3. **Group Owner:** Select the 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 & edit SharePoint users navigate to the following path:



Click on **Manage**. 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:
  - i. **Status:** It displays the status of users.
  - ii. **User Role:** It displays the User role.
  - iii. **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 a SharePoint user navigate to the following path:



Click on **Manage** and choose **Users** tab and click **Add Users** button.

1. **User:** Create new account.
2. **Display Name:** It displays the friendly name.
3. **User Role:** Select user role as Member, Owner or Visitor.
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:** Enter user's email address.
7. **Password:** Enter password (Must be alpha-numeric. Example: 1PassW0rD)
8. **Confirm password:** Re-type password.
9. **Notes:** Enter notes.
10. **Send Email:** Tick means Yes.
11. **Send email to:** Enter receiver's Email.

Click **Save** button.

## Edit SharePoint User

To edit SharePoint users navigate to the following path:

Navigation: Home » Service Director » SharePoint Hosting » Accounts

Click on **Manage** link. Choose **Users** tab. 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.

## Portal Usage Report

To view/manage the Usage Report for SharePoint navigate to the following path:



Navigation: Home » Service Director » SharePoint Hosting » Usage Report

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 Orchestration 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 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. **Subscription ID:** This is unique ID assigned to the subscriptions.
2. **Display Name:** Title or name that is displayed.
3. **URL:** Address of newly created site.
4. **Users:** Number of subscribed users against the site.
5. **Service Management:** 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:



Click on **Manage** link 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 also synchronize business units.
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. **Users:** You can [add new users](#) to CRM account.
5. **Business Units:** You can also [view and add business units](#).

## Viewing CRM Organization

To view CRM Organization navigate to the following path:



Click **Manage** and then 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:** This link 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:

 Navigation: Home » Service Director » CRM Hosting » Accounts

Click on **Manage** link. Select **Domains** tab.

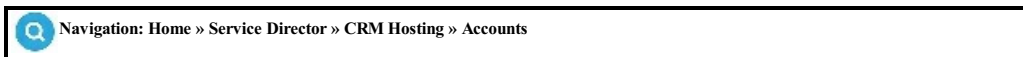
1. **Domain:** It shows the CRM domain name.
2. **Default:** It shows that whether it is default or not.
3. **Options:** If you want to set it as default the click on **Set Default**. Click on **delete** link to delete the CRM domain.

To add a new domain to the CRM account.

1. **Add New Domain:** Provide domain name.
2. **Set default:** Check or uncheck it.

## 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.

## Add CRM User

To add a new CRM user for a CRM organization navigate to the following path:

 Navigation: Home » Service Director » CRM Hosting » Accounts

Click on **Manage** link 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, Share Point but not CRM) active directory user account.
2. **User Role:** Select the user role you wish to assign to the new user.
3. **Email:** This is the e-mail address where CRM account e-mail is sent.

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

## CRM Usage Report

To view the Usage Report for CRM navigate to the following path:



Navigation: Home » Service Director » CRM Hosting » Usage Report

Click on the **Export to Excel** button to export the usage report to excel. The list displays the following:

1. **Organization Name:** It display the name of the CRM 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. **Display name:** It shows the display name of the customer.
5. **Organization Url:** It shows the organization URL.
6. **Users:** It shows the no of users.
7. **Domains:** It displays the no of domains.

## Orchestration Module for Skype for Business

Control Panel allows Hosted Skype for Business Service through its Orchestration Module for Microsoft Skype for Business.

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.

## Viewing Skype4B Accounts

To view Skype4B accounts navigate to the following path:



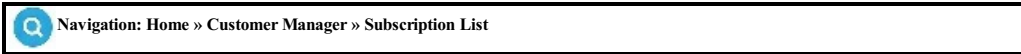
You can search your Skype4B/lync account by its account status such as **All**, **Active**, **Suspended** and **Graced**.

It displays the following listing:

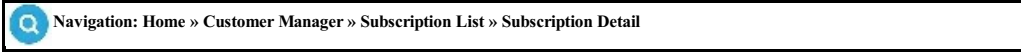
1. **Status:** It shows the status of the Skype4B account.
2. **Subsc.ID :**It shows the subscription id.
3. **SIP Domain:** It shows the SIP domain name
4. **Organization Name:** It displays the organization name.
5. **Package:** It displays the package name.
6. **Users:** It displays the no of users.
7. **Options:** Click on **Manage** to [manage services for Skype4B](#) account.

## 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.



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



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 **Manage** to [manage services of the 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:

 Navigation: Home » Service Director » Skype4B Hosting » Accounts

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:** 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 view and create [contacts](#).
10. **Meeting rooms:** You can enable [meeting rooms](#).

## Adding domain to Lync

To view and add new domain to your Lync 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 Skype4B User

To view and add user to Skype4B accounts navigate to the following path:

Navigation: Home » Service Director » Skype4B Hosting » Accounts

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. 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 Lync/Skype4B

To add user to Lync/ Skype 4B 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. **Lync enabled 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. **Password:** Generate Random (Must be alpha-numeric. Example: 1PassW0rD)
6. **Confirm password:** Retype password.
7. **Notes:** Enter notes here.

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:** Provide 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.

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

Then click on **Save** button.

**Note:** You can also [add bulk users](#) to your Lync account.

## Adding Bulk User

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:
  - i. Create new using CSV
  - ii. 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.

## Group Actions

To perform group actions on users of Skype4B accounts navigate to the following path:

 Navigation: Home » Service Director » Skype4B Hosting » Accounts

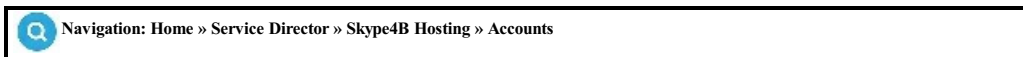
Click on **Manage** and select **Group Actions**> tab.

Select **Package/User**sto perform group actions.

1. **Package** : Select package.
2. **Skype4B enabled Active Directory users**: Select users.
3. **Full Name (Display name)**: It shows display/full name.

## Edit Skype4B User

To edit existing user of a Skype4B account navigate to following path:



Click on **Manage** link 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 User

To set/reset password of Skype4B user navigate to the following path:

Navigation: Home » Service Director » Skype4B Hosting » Accounts

Click on **Manage** link and select **Users** tab. From Options column click **Edit** in front of a User.

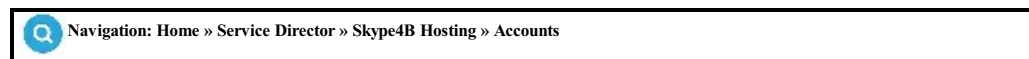
Under **Set Password** tab:

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** link 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:

Navigation: Home » Service Director » Skype4B Hosting » Accounts

Click on **Manage** link 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 and manage federation settings navigate to the following path:



Click on **Manage** link. Select **Federation Settings** tab:

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.

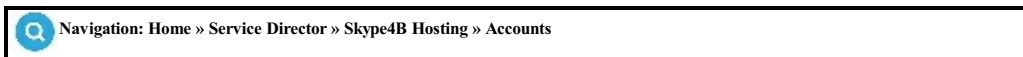
Fill in the following fields for the federation \ domain.

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 **Add New Domain** 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. It displays the following columns:

1. **Phone number:** It displays the phone number.
2. **Assigned To:** It shows to which it is assigned.

## Persistent Chat

Persistent chat lets you create topic-based discussion rooms that persist over time. Persistent chat rooms are where you can communicate and collaborate with a group of people who have a common area of interest.

To view and manage Persistent Chat navigate to the following path:



Click on **Manage**. Select **Persistent Chat** tab:

You can add & manage [Chat categories](#) and [Chat rooms](#) under **Persistent Chat** tab.

## Adding Chat Categories

To view and manage Persistent Chat navigate to the following path:



Click on **Manage**. 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:

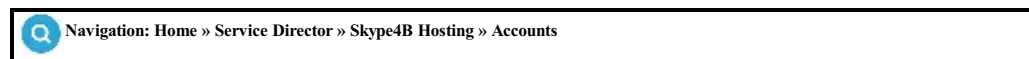
1. **Entire Organizations:** Checking this option will allow everyone to create chat rooms
2. **Users:** Select Users.

### 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 view and manage Persistent Chat navigate to the following path:



Click on **Manage**. 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 agent 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 and manage 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** link. 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 and manage queues navigate to the following path:



Navigation: Home » Service Director » Skype4B Hosting » Accounts

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.
  - i. **Time-out Period (in seconds):** You must enter a numeric value between 10 to 65535.
  - ii. **Actions:** Select an action from the drop down list.
5. **Enable queue overflow:** Check if you want to enable queue overflow.
  - i. **Maximum Number of Calls:** Provide maximum number of calls. You must enter a numeric value between 0 to 1000.
  - ii. **Forward the Call:** Select when to forward a call.
  - iii. **Call Action:** Select an appropriate action to be applied on a call.

Click on **Save** button when done.

## Viewing Workflows

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 Workflows 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 on **Add New Workflow** button.

If you want to [manage a holiday set](#) for the workflow click on the **Manage Holiday Sets** 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 are the glue that 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 and manage Workflows navigate to the following path:



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.

**Hunt Group:** Simple routing to a hunt group you define and additional settings such as welcome message, availability, and music on hold.

**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.

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:
  - i. Use text-to-speech
  - ii. Select a recording

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.
    - **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.

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.

Select a music file when the when the call is on hold under ***Music on Hold*** section.

Configure IVR responses under ***IVR Responses*** section.

## Managing Business Hours

To manage business hours, navigate to the following path:

 Navigation: Home » Service Director » Skype4B Hosting » Accounts

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.

## Managing Holiday Sets

To view and manage holiday sets navigate to the following path:

 Navigation: Home » Service Director » Skype4B Hosting » Accounts

Click on **Manage**. Select **Response Group** tab, click on **Workflows** tab:

Now click on **Manage Holiday Sets** button.

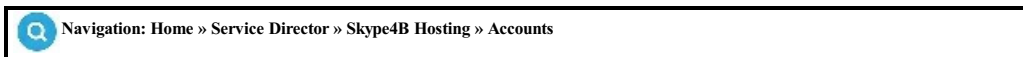
Select a holiday set from the dropdown list or click on **Add Holiday Set** button and define a new holiday set:

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.

## Viewing Contacts

To view Contacts navigate to the following path:



Click on **Manage** link 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

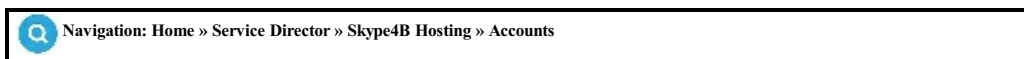
To add a new contact click [Add Contact](#) or you can also **Add Bulk Contacts**.

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 Contact

To add new Contacts navigate to the following path:



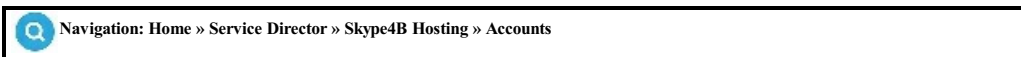
Click on **Manage** link and select **Contacts** tab. To add a new contact click **Add Contact** and provide following:

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. 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:



Click on **Manage** link and select **Meeting Rooms** tab.

Click on **Enable CS Meeting Room**. Select resource from the dropdown list and click **Enable**.

## Usage Report

To view Usage report navigate to the usage report.

 Navigation: Home » Service Director » Skype4B Hosting » Usage Report

To filter record provide **Organization Name**. Then click on **Search** button. You can also export usage report to excel sheet by clicking on **Export To Excel** 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. **Product Name:** It displays the product name.
4. **Active Domains:** It displays the number of active domains.
5. **Users:** It displays the number of users.
6. **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. **Skype4B User:** It displays the users.
3. **SPLA Type:** It displays the spla type of users.
4. **Phone Numbers:** It displays the phone number.

## Viewing Call Report

The Call Report provides a detailed look at an individual call. To view call report navigate to the following path:



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.

## Viewing 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:



Navigation: Home » Service Director » Skype4B Hosting » Conference Call Report

You can View Call Reports as Call Data Report, Organization Call Data Report, User Call Data Report

Under **Conference 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.

## Orchestration Module for Virtual Machines Hosting

Control Panel allows Virtual Machines Hosting through its Orchestration Module for Microsoft Hyper-V.

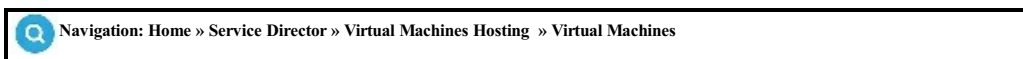
Control Panel Orchestration Module for Microsoft Hyper-V fully automates and controls service delivery for Microsoft Hyper-V Server 2022 and its legacy versions, manages billing and provides self service control panel. It support following version of Windows server:

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.

## VPS Accounts

To manage VPS accounts navigate to the following path:

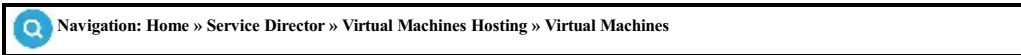


It displays the following listing:

1. **Status:** It shows the status of the account.
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 VPS](#) accounts.

## Virtual Machines Service Management

Orchestration Module for Microsoft Hyper-V activates rich web based interface for the management of Virtual Machines using the web interface the provider and the end-user may perform routine management task. To view Virtual Machines navigate to the following path:

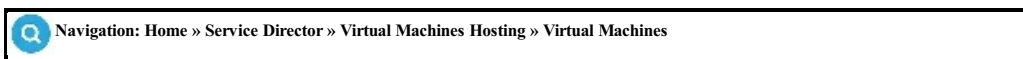


Click on **Manage**. Here you can see the following tabs:

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** link. Select **Virtual Machine 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. **Remote Desktop:** You can see the remote desktop.
6. **Move To:** You can Move To another VM.
7. **Change Password:** You can change password of a VM.

You can see the virtual machine settings under *Virtual Machine Settings* 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. **Machine State:** It shows the state of the machine whether On or Off.
3. **Memory (RAM):** It displays the size of the memory in MB. You can also change your memory by clicking on **Change** button.
4. **CPU Cores:** It displays the no of CPU cores. You can also change your the no of CPU cores by clicking on **Change** button.
5. **Boot From CDROM:** It shows the CDROM to boot from.
6. **Snapshot Limit:** You can change the snapshot limits by clicking on the **Change** button.

Further we have also have given following option in latest build:

1. Password change option
2. Host name change Option
3. Band width quota change option
4. Showing current month band width used.


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.

You can also Add new disk by clicking on **Add Disk** button. You can also Add Public and Private IP's under Network Management section.

## Snapshots

To manage snapshots (standalone) navigate to the following path:

 Navigation: Home » Service Director » Virtual Machines Hosting » Virtual Machines

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:

Navigation: Home » Service Director » Virtual Machines Hosting » Virtual Machines

Click on **Manage** in front of the VPS account. Select **Bandwidth Detail** tab. Bandwidth Details tab shows bandwidth allowed per month for a VPS, total bandwidth used in a selected date range.

## Usage Report for Virtual Machines

To view Usage report navigate to the usage report.



Navigation: Home » Service Director » Virtual Machines Hosting » 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 **Export to Excel**.

It displays the following listing:

1. Company Name
2. Customer Name
3. Customer number
4. Package Name
5. Server name
6. Owner
7. VM Name
8. CPU Cores
9. RAM (MB)
10. Operating System
11. No Of Disks
12. Total Disks Space
13. Total Public NICs
14. Total Private NICs
15. Total Public IPs
16. Total Private IPs
17. Date Created

## 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 handle 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 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.

The CSP Tenants will display following listing:

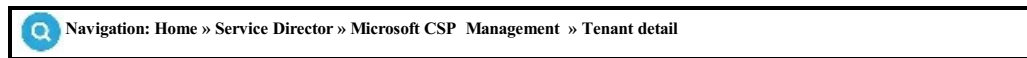
1. **Status:** It shows the status of the CSP tenant.
2. **Subsc.ID:** It shows the subscription ID of the CSP account.
3. **Package Name:** It shows the package to which the tenant is subscribed.
4. **Tenant Name:** It shows the tenant name.
5. **Options:** It displays the options to Manage and Edit account.

## CSP Tenants Service Management

To manage CSP tenants/Accounts, navigate to the following path:



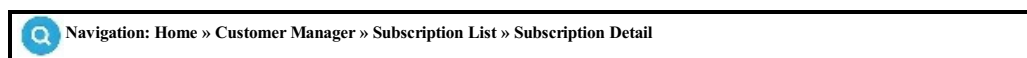
Click **Manage** in front of CSP tenant. You will land on "Tenant Detail" page:



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 **Subscriptions** 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](#): If direct routing is configured you can assign numbers to users/resources.
11. **Teams**: Under teams tab you can manage [Teams](#) and [Channels](#).
12. [Policies](#): You can configure password policies for CSP user.
13. [Group Actions](#): You can view all group action performed.

**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:

Navigation: Home » Service Director » Microsoft CSP » Accounts

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 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. **Tenant Name:** It shows the tenant name.
3. **Admin email:** It shows Admin email.
4. **Admin password:** It shows password when you click show password.
5. **Manage tenant using panel:** Select **Disable** to disable management of tenant using control panel.
6. **Azure AD Sync enabled:** It shows if Azure AD Sync enabled
7. **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

## 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 » Subscriptions » All Subscriptions

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](#)

## 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.

In order to manage the hybrid organization navigate to the path:



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.

## Add CSP Subscription

To add & manage CSP subscriptions 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, 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:

Navigation: Home » Service Director » Microsoft CSP » Accounts

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** 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, 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** 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, 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. 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 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, 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** link. 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.

## CSP Domains

To view and add CSP tenant Domains, navigate to the following path as shown below:



Click on **Manage** link 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.

## Viewing CSP Users

To view and add users, navigate to the following path as shown below:



Click on **Manage** link 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 User

To add Users, navigate to the following path as shown below:



Click on **Manage** link 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

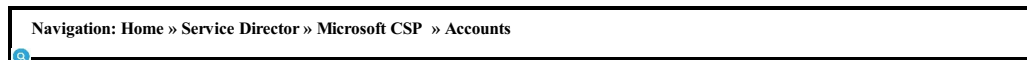
### Licenses

1. **Usage Location:** Select Location.
2. **Assign Licenses:** Select Licenses.

Click **Save** when done.

## Viewing O365 Shared Mailboxes

To view and add shared mailboxes, navigate to the following path as shown below:



Click on **Manage** link 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** link in front of a CSP Tenant. Now select **Shared Mailboxes** tab. To add a new shared mailbox click **Add Mailbox** button.

Under **General Settings** 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.

1. **General Settings:** You can select and provide following in general settings.
  - i. **Email alias name:** Provide email alias name.
  - ii. **Address Book Policy:** Select address book policy.
  - 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.
  - vii. **Custom Attributes:** Select Custom Attributes for the Shared Mailbox.
  - viii. **Email Addresses:** Provide here email address.
  - ix. **Mailbox features:** You can provide following mailbox features for shared mailboxes.
2. **Policies**
  - i. **Sharing Policy:** Select sharing policy.
  - ii. **Role Assignment Policy:** Select role assignment policy.
  - iii. **Retention policy:** Select retention policy.
  - iv. **ActiveSync enabled:** Check to enable ActiveSync.
3. **Email Connectivity**
  - i. **OWA Enabled:** Check to enable OWA.
  - ii. **IMAP Enabled:** Check to enable IMAP.
  - iii. **POP3 Enabled:** Check to enable POP3.
  - iv. **MAPI Enabled:** Check to enable MAPI.
  - v. **Mailbox Archive:** Check to enable Mailbox Archive and provide Mailbox archive name.
  - vi. **Mail Flow Settings:** Check this option to Enable email forwarding and select from the dropdown list.
4. **Message Size Restrictions**
  - i. **Maximum sent message size (KB):** Provide size in KB.
  - ii. **Maximum received message size (KB):** Provide size in KB.
5. **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
6. **Mail Tip:** Provide mailtip.
7. **Mailbox Permissions:** You can select mailboxes for Send As, and Full Access Permissions.
8. **MemberOf:** Select member(s) of the shared mailbox.
9. **Calendar Permissions:** Click **Add Permission** to add calendar permissions, Select **Member** and **Permission Level** and save.

Click **Save** when done.

## Viewing CSP Resource Mailboxes

To view and add resource 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 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 CSP 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.
  - a. Policies
    - i. **Sharing Policy:** Select sharing policy.
    - ii. **Role Assignment Policy:** Select role assignment policy.
    - iii. **Retention policy:** Select retention policy.
    - iv. **ActiveSync enabled:** Check to enable ActiveSync.
  - b. **Email Connectivity**
    - i. **OWA Enabled:** Check to enable OWA.
    - ii. **IMAP Enabled:** Check to enable IMAP.
    - iii. **POP3 Enabled:** Check to enable POP3.
    - iv. **MAPI Enabled:** Check to enable MAPI.
  - c. **Mailbox Archive:** Check to enable Mailbox Archive and provide Mailbox archive name.
  - d. **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:**
  - A. 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:** Select following:
      - 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** link 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 Settings** section provide following:

1. **User Display Name:** Provide User friendly name of Equipment mailbox.
2. **User Principal Name:** Provide UPName of Mailbox.

### Licenses

1. **Usage Location:** Select Location.
2. **Assign Licenses:** Select Licenses.

## Viewing CSP Groups

To view and add Groups, navigate to the following path as shown below:



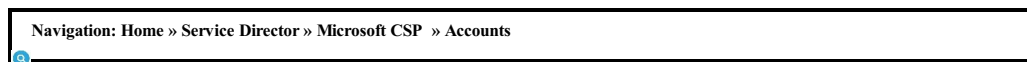
Click on **Managelink** in front of a CSP Tenant. Now select **Groups** tab. To add a new group click [Add Group](#) button.

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.

## Add CSP Groups

To add Groups navigate to the following path as shown below:



Click on **Manage** link 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.
  - i. **Member Join Restriction:** Select join restriction.
    - 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. **Approval Required:** All requests are approved or rejected by the group owners.
  - ii. **Member Leave Restriction:** Select leave restriction.
    - 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.
2. **Delivery management:** You can choose delivery management for senders.
  - i. **Choose who can send messages to this group:** Select one of the following:
    - a. Only senders inside my organization
    - b. Senders inside and outside of my organization
  - ii. **Accept message from:** Select members.
  - iii. **Reject message from:** Select members.
3. **Message Approval:** Configure Message approval for group.
  - i. **Moderation enabled:** Check if you want to enable.
  - ii. **Moderated By:** Select members.
  - iii. **Send moderation notifications:** Select one of the following option.
    - a. Notify all senders when their messages aren't approved
    - b. Notify senders in your organization when their messages aren't approved.
    - c. Don't notify anyone when a message isn't approved
  - iv. **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.
  - i. **Mailtip:** Provide Mail tip.
  - ii. **Email Addresses:** Select the email address type:
    - a. SMTP
    - b. 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.



## Add Mail Contacts

To view and add Mail Contacts, navigate to the following path as shown below:



Click on **Manage** link 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.

Click **Save** when done.

## Viewing SharePoint (CSP)

To view SharePoint sites under CSP account navigate to the following path as shown below:



Click on **Manage** link. 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** link. 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 permissions level.

## 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 add users for 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 **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 add group in 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.

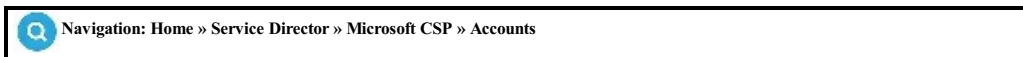
Now select **Edit** from options column of a SharePoint site. Under **Groups** tab you can add new group by clicking **Add Group**.

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 view permissions level of 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 **Permission Levels** tab you can view permissions levels with Name & Description.

## Group Operations for SharePoint (CSP)

To add/perform group operations on SharePoint sites under CSP account navigate to the following path as shown below:

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** link. 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.

## Assignments (Direct Routing)

To assign numbers in direct routing, navigate to the following path as shown below:



Click on **Manage** link 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** link 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 (Direct Routing)

To add phone numbers in direct routing, navigate to the following path as shown below:



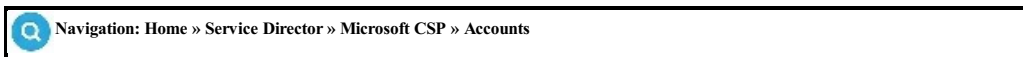
Click on **Manage** link in front of a CSP Tenant. Select **Direct Routing** tab. Now select **Phone Numbers** tab. It displays following in the listing:

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(Direct Routing)

To add service phone numbers in direct routing, navigate to the following path as shown below:



Click on **Manage** link 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.

## Viewing Dial Plans ( Direct Routing)

You can view & 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**.

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:

Navigation: Home » Service Director » Microsoft CSP » Accounts

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:

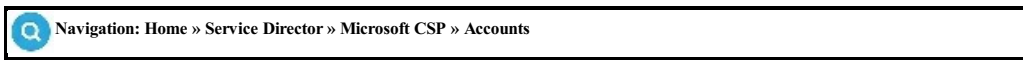
Navigation: Home » Service Director » Microsoft CSP » Accounts

Now click **Manage** in front of CSP tenant and select **Direct Routing** tab. Then select **Resources**.

Click **Add Resources** and provide the required resources.

## Viewing Teams

To view and manage teams navigate to the following path as shown below:

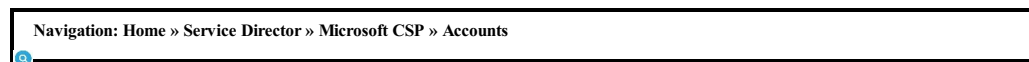


Click on **Manage** link in front of a CSP Tenant. Now select **Teams** tab.

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** link in front of a CSP Tenant. Now select **Teams** tab.

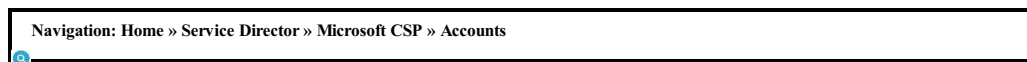
Click **Add Team** to add a new team and provide following:

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** link 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 an 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** link 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** link 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 (Teams)

To bulk import channels navigate to the following path as shown below:

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** link 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

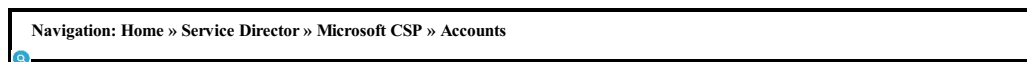
There are two options to Import:

1. Create New
2. Create new an 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** link in front of a CSP Tenant. Now select **Policies** tab.

**Set user passwords to never expire:** Check box

Click **Save** when done.

## 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:

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:

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:

Tenant Name, Display name, User Principal Name, Licenses, User Roles, Sign-In Status, Deleted, Mailbox type, Skype4B Enabled.

Under tab **Azure Usage report** you can view azure usage reports.

Similarly you under tab **Direct Routing reports**, you can view following:

Tenant Name, PSTN Gateway, Associated Phone Numbers, Assigned Phone Numbers, Voice Mail enabled Users, Enterprise Voice Enabled Users

## Group Actions for CSP

To review CSP Group Jobs navigate to the path as shown below:

A navigation breadcrumb bar with a blue circular icon on the left and the text "Navigation: Home » Service Director » Microsoft CSP » Group Actions" inside a black rectangular border.

CSP Group Actions can be searched by Parameters, Action Type, Status.

It displays following listing:

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. **Added by:** It displays who (provider, employee, customer etc.) added the Job.
8. **Option:** It displays options to Run, Cancel the job.

## Trial Subscriptions

To view trial subscriptions navigate to the path mentioned below:

Navigation: Home » Service Director » Microsoft CSP » Trial Subscriptions

You can **Trial Subscriptions** by following:

1. Tenant Name
2. Select Status

## License Usage Report

To view License Usage Report navigate to the path mentioned below:



Navigation: Home » Service Director » Microsoft CSP » License Usage Report

You can **Search** reports by following:

1. Tenant
2. Domain
3. License

You can view following under **License Usage Report**

1. **Tenant:** It displays tenant name, domain name.
2. **License:** It displays license in use.
3. **Active Units:** It displays active units.
4. **Consumed Units:** It displays consumed units.
5. **Locked Out Units:** It displays locked out units.
6. **Suspended Units:** It displays suspended units.
7. **Warning Units:** It displays warning units.

## Tenant Price Report

To view CSP tenant price and package price report navigate to the path mentioned below:

Navigation: Home » Service Director » Microsoft CSP » Price Report

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

## 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 fully automates and controls service delivery for "Windows Server 2016".

Windows Work Folders 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.

## Work Folders Accounts

To view work folders accounts navigate to following path:



Navigation: Home » Service Director » Work Folders Hosting » Accounts

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**

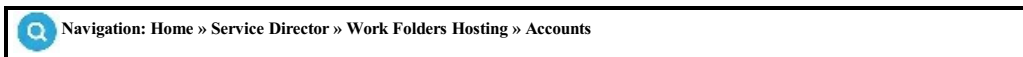
Click **Search**.

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. **Work Folders:** It shows the number of work folders added.
6. **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. You will land on following path:



**General Info tab** shows below mentioned sections:

1. **Operations:** You can perform operations like Generate Renewal Invoice.
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:

- **Limits:** It shows the following listings:
  - a. **Resource name**
  - b. **Allocation**
  - c. **Net Allocation**
  - d. **Utilized**
  - e. **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 manage 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:

Navigation: Home » Service Director » Work Folders Hosting » Accounts

Click **Manage** in front of a work folders account in options column.

Navigation: Home » Subscriptions » All Subscriptions » Work Folders Hosting

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.

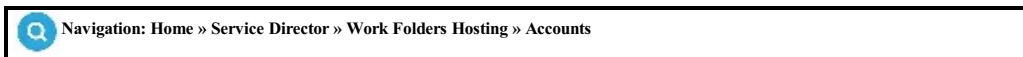
**Security Group** tab: It shows the [Security Groups](#).

**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 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 **Security Groups** tab. It display 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.

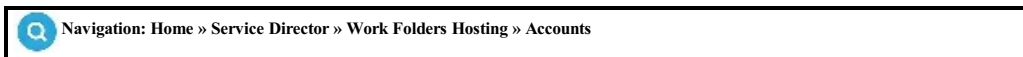
Click **Add Security Group** button to add a new Security Group (SG):

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 display name.
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. **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. Unlock
  - v. Disable
  - vi. Remove

## Add Users

To add AD users in work folder 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 » Subscriptions » All Subscriptions » Work Folders Hosting

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:

Navigation: Home » Service Director » Active Directory » Active Directory Users

To add 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 » Subscriptions » All Subscriptions » Work Folders Hosting

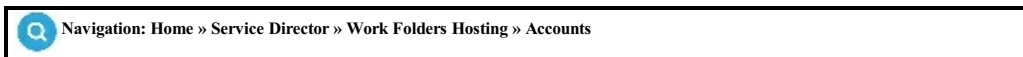
Select **Organization** tab and then select **Users** tab. Now click **Update Bulk Users**:

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.

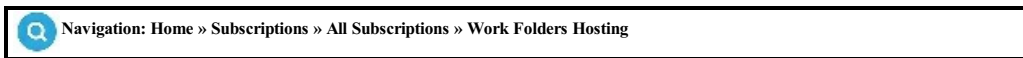
Click **Save** when done.

## 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 Complete/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. Status
  - ii. Allocated Storage
  - iii. 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. Allocated Storage
  - ii. Current Storage Used
  - iii. Quota Template Name
  - iv. 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.

## Usage Report

To view usage report for work folders navigate to following path:



Navigation: Home » Service Director » Work Folders Hosting » Usage Report

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. Organization Name
3. Company Name
4. Display Name
5. Work Folder Path
6. Select Quota Template
7. Select Server
8. 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 Remote Desktop Services (RDS) fully automates and controls service delivery for **Microsoft Remote Desktop Service**, manages billing and provides self service control panel to your customer.

Customers can now avail virtual (personal / pooled) desktops and terminal sessions. With only a reliable internet connection, you can have access to a single panel to manage RDS session collections, RDS virtual desktop collections, user's associations and many via Control Panel's Remote Desktop Service Module.

**Note:** Please make sure you have subscribed to Orchestration Module for Remote Desktop Services 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.

## RDS Accounts

To view/manage RDS accounts navigate to following path:

Navigation: Home » Service Director » RDS Hosting » Accounts

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. **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 manage 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 following path:

Navigation: Home » Service Director » RDS Hosting » Accounts

Click **Manage** in front of a RDS account in options column. Once you click **Manage**, you will be on following navigation path:

Navigation: Home » Subscriptions » All Subscriptions » RDS Hosting

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.

Select **RDS Organization** tab. It shows following in the listing:

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.

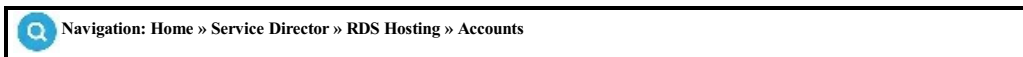
**Security Group** tab: It shows the [Security Groups](#).

**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 in 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.

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. **Group Scope:** It shows scope of group.
3. **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 RDS users navigate to following path:

Navigation: Home » Service Director » RDS Hosting » Accounts

Click **Manage** in front of a RDS account in options column. Once you click **Manage**, you will be on following navigation path:

Navigation: Home » Subscriptions » All Subscriptions » RDS Hosting

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.

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. **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 new users in RDS account navigate to following path:

Navigation: Home » Service Director » RDS Hosting » Accounts

Click **Manage** in front of a RDS account in options column. Once you click **Manage**, you will be on following navigation path:

Navigation: Home » Subscriptions » All Subscriptions » RDS Hosting

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.

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:

Navigation: Home » Service Director » Active Directory » Active Directory Users

To add 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 in RDS account navigate to following path:

Navigation: Home » Service Director » RDS Hosting » Accounts

Click **Manage** in front of a RDS account in options column. Once you click **Manage**, you will be on following navigation path:

Navigation: Home » Subscriptions » All Subscriptions » RDS Hosting

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.

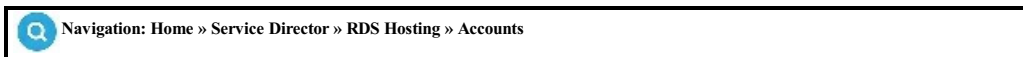
Select **RDS Organization** tab and then select **Users** tab. Now click **Update Bulk Users**:

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 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.

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:** 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:

Navigation: Home » Service Director » RDS Hosting » Accounts

Click **Manage** in front of a RDS account in options column. Once you click **Manage**, you will be on following navigation path:

Navigation: Home » Subscriptions » All Subscriptions » RDS Hosting

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.

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:

Navigation: Home » Service Director » RDS Hosting » Accounts

Click **Manage** in front of a RDS account in options column. Once you click **Manage**, you will be on following navigation path:

Navigation: Home » Subscriptions » All Subscriptions » RDS Hosting

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.

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.

## My Tickets


To view My Tickets navigate to the following path:

 Navigation: Home » Help Desk » My Tickets

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

1. **Ticket Number:** Enter ticket number.
2. **Subject:** Enter subject.
3. **Department:** Select department e.g. support department, billing department etc.
4. **Status:** It shows the status i.e. Waiting, Replied or Closed.
5. **Title:** It shows the title.

Click on the Ticket number to view ticket details:

 Navigation: Home » Help Desk » Client Tickets

### Ticket ID

1. **Department:** It shows the department for e.g. billing department.
2. **Created On:** It shows the date of the ticket on which it was created.
3. **Priority of ticket:** It shows the priority of the ticket for e.g. high.
4. **Status:** It shows the status of the ticket.

To Post a Ticket Response, fill in these fields and then click on **Send Reply** button.

1. **Subject:** It contains the subject.
2. **Body:** Provide body of the reply.
3. **Attachment:** Choose attachment.

## New Ticket

New tickets can be submitted by navigating to:



Navigation: Home » Help Desk » New Ticket

Fill in the required fields:

1. **Subject:** Enter subject.
2. **Department:** Select the department from the drop down list Support Department, Billing Department, Copy Of Support Department etc.
3. **Priority:** Select priority e.g. Urgent, Normal or Low.
4. **Attachment:** Upload the attachment.
5. **Message:** Enter message.

Now simply submit the ticket by clicking on **Submit** button.

## Mailing Lists

To view mailing lists navigate to the following path:

Navigation: Home » My Provider » Mailing Lists

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