

Next Generation Hosting Automation, Billing & Management Software

Introduction to Provisioning System

Operations Manual



Reseller Control Center

Enterprise Web Hosting

Operations Manual



Orchestration Module for MS Exchange



Orchestration Module for MS SharePoint



Orchestration Module for MS CRM



Orchestration Module for MS Skype4B



Orchestration Module for Microsoft CSP



Orchestration Module for MS Hyper-V



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Orchestration Module for Web Hosting

Preface

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

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

Document Conventions

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

Control Panel Provisioning System

Control Panel 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 Hostings** 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
	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
	Microsoft Cloud Solution Provider
	Active Directory Synchronization
	Work Folders Windows Server 2016
	Microsoft Remote Desktop Service

Control Centers

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

1. **Reseller Control Center (RCC):** This web based control center provides tools and applications for the reseller user. It includes products management, billing and online store-front.
2. **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.
3. **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. Reseller can edit profile and change password anytime. Place the cursor on **top** right corner which shows reseller name is logged in as Reseller. You can view following options
 - i. Profile
 - ii. Change Password
 - iii. Two Factor Authentication
 - iv. Logout
2. Resellers can also change **Skin color** by clicking on brush icon on **top** right corner.
3. Resellers can also **Search** Customers, Company , Subscription, User email by clicking on search icon on top right corner.
4. Resellers can also **Search** navigation to a particular page from Left pane.
5. Resellers can subscribe service for their own use and to resell to their End Customers by selecting one of following and select service.
 - i. **Subscribe Service** (Reseller as an End Customer) or
 - ii. **Subscribe As Service** (To resell service to their End Customers)
6. Resellers can also view total number of Customers, Subscriptions, Invoices, Payments, Open Tickets and view Quota and Usage Reports.

Logging In

After you connect to the control panel, you will be prompted for login name and password.

To log in to your **Reseller Control Center (RCC)**:

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

Click **Save** when done.

You can also provide additional login if 3rd party azure login is enabled and click **Add**

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.

How to Subscribe Service?

Subscribe Service for Reseller

Resellers can subscribe service for their own use and to resell to their End Customers by navigating to the following path:

Navigation: Home » Dashboard

Place cursor on one of following and select Service:

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

Subscribe Service for Customer

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

Navigation: Home » Customer Manager » Customers

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

Navigation: Home » Customer Manager » Customers » Customer Detail

Click **Subscribe Service** button under **Summary** tab. or

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

Complete Service Provisioning:

These are the step for subscribing a service.

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

Customer Management Overview

There are two types of customer accounts:

1. **Reseller account:** Reseller type customer accounts can re-sell the services.
2. **Customer account:** Customer account is end-user account associated with the provider or reseller account. The customer account user can login to Customer Control Center (CCC) to manage the products and services he purchased.

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

Customers

To view Customers navigate to the following path:

Navigation: Home » Customer Manager » Customers

You will see following:

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

New customer can be created by clicking on **New Customer** button. Existing customer can be searched by filling the following fields:

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

Customers List:

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

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

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

Access Template:

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

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

Creating a Customer

A customer account can be created in two ways.

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

To create a client using offline method navigate to the following path and select **End Customer** from the drop down list. Select Customer Ownership:



or simply navigate to the following path:



Click on **New Customer** button.

Customer Login Information

1. **User name (e-mail address):** Provide User name.
2. **Password:** Provide password.
3. **Confirm password:** Retype password.
4. **Send Setup Email:** Check box

Customer Information

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

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

Deleting a Customer

It is possible to delete a customer and everything related to them from Control Panel.

What gets deleted?

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

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



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



Click **Delete** to delete the customer.

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

Suspend a Customer

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

 Navigation: Home » Customer Manager » Customers

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

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

 Navigation: Home » Customer Manager » Customers » Customer Detail

Click **Suspend** to suspend the customer.

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

Email Customer

To email customer navigate to the following path:

 Navigation: Home » Customer Manager » Customers

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

 Navigation: Home » Customer Manager » Customers » Customer Detail

Click **Email Customer** and provide following:

Send Email

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

Click **Send** to send email.

Import Customers

To import customers navigate to the following path:



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

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

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

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

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

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

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

Access Templates

To add new Access template navigate to the following path:

 Navigation: Home » Customer Manager » Customers

Then select **Access Template** tab.

It shows the following listing:

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

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

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

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

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

 Navigation: Home » Customer Manager » Customers

Then click on the customer name.

 Navigation: Home » Customer Manager » Customers » Customer Detail

Select **Permissions** tab.

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

Click **Save**.

Customer Product Listing

Control panel offers Traditional and enterprise services through its automation modules for **Customers**. These hosted services are sold to customer by **Customer Products** which are fully customize-able as per customer needs.

Following services are offered by control panel:

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

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

To create a hosted service plan navigate to following path:



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

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

Customer Detail

To view customer detail navigate to the following path:

Navigation: Home » Customer Manager » Customers

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

Navigation: Home » Customer Manager » Customers » Customer Detail

The following tabs are shown:

Summary: The operations column consists of the following buttons.

1. **Login to Control Panel:** You can Login to the customer panel.
2. **Suspend:** You can suspend the customer.
3. **Delete:** You can delete the customer.
4. **Email Customer:** You can Email to customer.
5. **Convert to Reseller:** Click if you want to convert customer to reseller.
6. **Move Customer:** You can [Move customer](#) to a reseller.

Similarly, the account column shows the customer's account summary and the billing column shows the billing summary.

1. **Personal Info:** This will show the info of the customer such as account access, primary contact, etc. You can add WHMCS User.Id if you are using WHMCS Module.
2. **Contacts:** You can add contact to the customer by clicking on the **Add Contact** button.
3. **Billing:** Here you can generate invoice by clicking on the **Generate invoice** and can also make [new credit adjustments](#) by clicking on the **New credit adjustment** button.
4. **Payment profiles:** You can [add credit card](#) to your customer account by clicking on the **Add Credit Card** button.
5. **Subscriptions:** You can view a subscriptions of the customer and [subscribe more services](#) for that customer by clicking on the **Subscribe Service** button.
6. **Permissions:** You can update the [Permissions/Access Templates](#).
7. **White Label:** You can also [white label](#) your customers.
8. **Mailing Lists:** You can specify mailing lists if [Mailchimp](#) is enabled

Authenticate Active Directory Users

You can authenticate both customers and customers contact via AD user. You can also authenticate staff users to login to panel via AD account.

Authenticate Customers/Contacts via AD Account

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

 Navigation: Home » Customer Manager » Customers

You can authenticate both customers and customers contact.

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

Authenticate Staff Users via AD Account

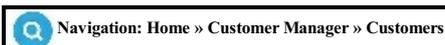
For **Staff Users**, navigate to following path:

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

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

Move Customer

To move customer detail navigate to the following path:

 Navigation: Home » Customer Manager » Customers

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

 Navigation: Home » Customer Manager » Customers » Customer Detail

Click **Move Customer**.

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

Instructions/Pre-requisites

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

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

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

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

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

In case you have mailbox template in use for the customer subscription, you also need to select new templates.

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

Click **Save** when done.

Adding Contact

To view customer detail navigate to the following path:

Navigation: Home » Customer Manager » Customers

Then click on the customer name.

Navigation: Home » Customer Manager » Customers » Customer Detail

Select **Contacts** tab. You can see the following listings for contacts.

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

Add Contact

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

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

Account Access

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

Click **Save** when done.

Additional Login

You can also provide additional login to enable azure login for your contact.

Change Billing Day

You can override default billing day by setting a billing day for customer. To do this navigate to the following path:

 Navigation: Home » Customer Manager » Customers

Click on the customer name and then click on **Billing** tab. Click **Change** in front of *Monthly Billing Day*. Select the new date and click **OK** button.

How to Add Credit Card?

Adding credit card against a client is to smooth line the payment process for that particular client, this could be for long term deals where recurring payment are likely to occur, in such situations you may be adding credit card in your billing system at the platform of Control Panel.

You can add Credit Card under **Payment profiles** for a specific customer, navigate to the following path:

Navigation: Home » Customer Manager » Customers

Then click on the customer name.

Navigation: Home » Customer Manager » Customers » Customer Detail

Select **Payment Profiles** tab and click on **Add Credit Card** button:

To add a credit card in **Billing Manager** you have to navigate to the following path and click on **Add Credit Card** button:

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

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 .

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

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

View Subscriptions

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

To view services/products navigate to following path:

 Navigation: Home » Customer Manager » Customer

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

 Navigation: Home » Customer Manager » Customers » Customer Detail

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

How To Move Subscription(s)

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

Navigation: Home » Customer Manager » Customers

Then click on the customer name.

Navigation: Home » Customer Manager » Customers » Customer Detail

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

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

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

For Package following is shown:

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

Click **Save** when done.

White Label

To white label customer navigate to the following path:

Navigation: Home » Customer Manager » Customers

Then click on the customer name.

Navigation: Home » Customer Manager » Customers » Customer Detail

Select **White Label** tab.

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

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

Click on **Update** button when done.

Understanding Subscriptions

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

Subscription Types

Following subscription types are supported:

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

Subscriptions List

To view a subscription navigate to the following path:



You can filter and search subscription list by following:

1. **Subsc.ID:** Search by Subsc.ID
2. **Customer ID:** Search by Customer ID
3. **Customer Name:** Search by Customer Name
4. **Domain Name:** Search by Domain Name
5. **Package:** Search by Package
6. **Notes:** Search by Notes
7. **Company name:** Search by Company name
8. **Select Product Type:** Search by selecting product type from dropdown list
9. **Select Status:** Search by selecting status from dropdown list
10. **Select trial:** Search by selecting status from dropdown list
11. **Label:** Search by label.
12. **Show Deleted:** Checkbox

Click **Search** button to display.

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

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

Subscription Detail

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



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



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

General Info tab shows below mentioned sections:

1. **Operations:** You can perform operations like Services Management, Generate Renewal Invoice, Cancel Subscription, [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:

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

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

Billing tab shows the listing for the following:

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

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

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

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

Deleting Subscription

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

To terminate a subscription navigate to the following path:

 Navigation: Home » Customer Manager » Subscriptions List

Click on the subscription name you want to terminate. On next form, click on **Cancel Subscription** button. Alternatively, if you cancel the payment document associated with the subscription you can mark the subscription as terminated.

Upgrade/Downgrade Subscription

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

 Navigation: Home » Service Plans

Select the type of service from following:

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

Select **Customer Product Listings** tab for Customers subscriptions.

Click **Add New Product** button.

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

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

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

 Navigation: Home » Customer Manager » Subscription List

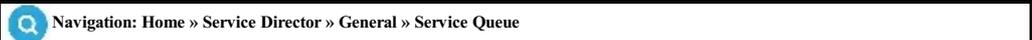
Once you click the subscription name, you will be on following navigation path:

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

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

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

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

 Navigation: Home » Service Director » General » Service Queue

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

Generate Subscription Renewal Order

When a customer subscribes with a service automatic notifications are sent to the customer before the service expiration day comes closer. There are several configurable notices sent to the customer before and after the subscription expiration and before the service termination. You may configure these notices by going to following path:

 Navigation: Home » System Configuration » Emails Configuration » Email Templates

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

 Navigation: Home » Customer Manager » Subscriptions List

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

How to Generate Renewal Invoice

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



Navigation: Home » Customer Manager » Subscriptions List

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

Adjusting Subscription Renewal Notifications

It is possible to adjust subscription renewal notifications. To do this navigate to the following path:

 Navigation: Home » System Configuration » Emails Configuration » Email Templates

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

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

Adjusting Subscription Renewal Notification Periods

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

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

Offline Order Form

Offline Order form is used to create new customer and subscribe it for service on the same go. In order to create new customer and subscribe service navigate through the following path:



End Customer:

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

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

Read more about [Store Configuration and setting up Order Forms](#).

Billing Management Overview

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

The concepts involved are the following:

1. [Document](#)
2. [Invoice](#)
3. [Invoice Status](#)
4. [Payment](#)
5. [Payment Status](#)
6. [Credit](#)
7. [Refund](#)

Document

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

 Navigation: Home » Billing Manager » Documents

Invoice

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

 Navigation: Home » Billing Manager » Documents » Invoices

Invoice Status

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

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

Payment

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

 [Home](#) » [Billing Manager](#) » [Documents](#) » [Payments](#)

Payment Status

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

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

Credit

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

 [Navigation: Home](#) » [Billing Manager](#) » [Documents](#) » [Credits](#)

Refund

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

 [Navigation: Home](#) » [Billing Manager](#) » [Documents](#) » [Refunds](#)

Documents

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

Navigate to the path:



Documents may be searched by

1. **Doc Num:** Doc Num is number of the document. It is unique.
2. **Customer ID:** It is the customer Id.
3. **Customer Name:** It is the customer name.
4. **Document Type:** The following types of the documents are available:
 - i. [Invoice](#): It displays all the invoices and shows the status whether it is due, paid, partially paid cancelled or overdue.
 - ii. [Payments](#): Payments also shows the status whether it is open, pending, fraud or completed.
 - iii. [Credit Adjustment](#): It displays the record of documents type adjusted by credit.
 - iv. [Refunds](#): It displays the record of documents type adjusted by debit.

Filter Record

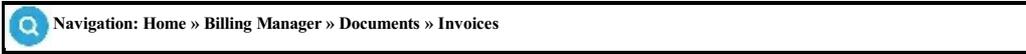
You may filter your record by applying before and after date.

1. **Status:** Paid, fraud suspect etc.
2. **Doc. Num:** It is the document number.
3. **Document Type:** It shows the type of the document i.e. Payment, invoice etc.
4. **Document Date:** It displays the date on which the document is created.
5. **Customer ID:** It is the customer ID.
6. **Customer Name:** It is the customer name.
7. **Total:** It displays the total.
8. **Balance:** It displays the balance amount.

Viewing Invoices

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

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

 Navigation: Home » Billing Manager » Documents » Invoices

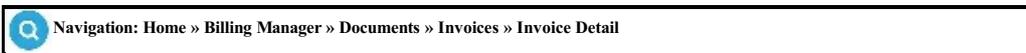
The **invoice** can be searched by filling in the following fields:

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

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

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

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

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

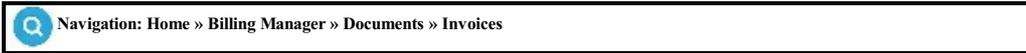
The following tabs are shown:

Details: Details tab provide you customer's information.

Invoices Paid: It shows the invoices that are paid

How to Cancel Invoice?

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



Select the invoice which you wish to cancel, by clicking the invoice number (i.e. the Doc. Num) will take you to the following interface, click on **Cancel Invoice** button under Operations.

How to Print Invoice?

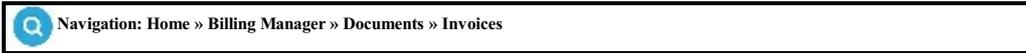
The print media has never been less important, in certain cases you may need to print the invoice for any reason like you have to fax/post the invoice to client etc. However, to print an invoice navigate to the following path:

 Navigation: Home » Billing Manager » Documents » Invoices

Select the invoice which you wish to print, by clicking the invoice number (i.e. the Doc. Num) will take you to the following interface, click on **Download PDF** button under Operations and then using the print option send print of your document.

How to Email Invoice?

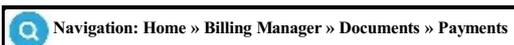
For any online business the email is a primary source of communication between client and business, most of the time you have to email the invoices to your client. Thus, to achieve this you have to navigate to the following path:



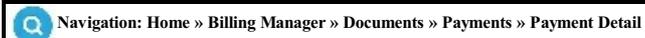
Select the invoice which you wish to send as email, by clicking the invoice number (i.e. the Doc. Num) will take you to the following interface, click on **Email Invoice** button under Operations.

Viewing Payment

To view payments navigate to the following path:

 Navigation: Home » Billing Manager » Documents » Payments

Click on Doc Num or navigate to the following path:

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

Operations: Here you can make payments OnHold/UnHold, Mark Fraud Suspect or Cancel Payment.

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

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

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

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

Then click on **Add Comment** button.

Viewing Credits

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

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

 Navigation: Home » Billing Manager » Documents » Credits

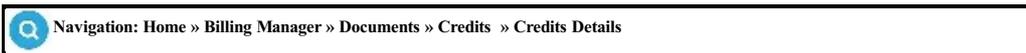
Credits can be searched by filling in the following fields:

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

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

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

Click on Doc Num or navigate to the following path:

 Navigation: Home » Billing Manager » Documents » Credits » Credits Details

The following tabs are shown:

Details: Details tab provide you customer's information.

Invoices Paid: It shows the invoices that are paid.

How to Issue Credit

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

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



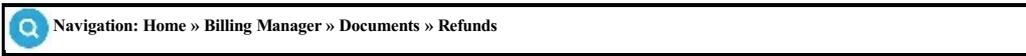
Select the client, to whom you wish to issue credit and provide the information in the field and click on **Save** button.

1. **Date:** Select date.
2. **Customer:** Select customer.
3. **Reference number:** Enter reference number.
4. **Total:** Select currency USD, Dollar (USD), Great Britain Pound (GBP) etc.
5. **Send Email:** Check/UnCheck (Will be applied on Due or New Invoices).
6. **Comment:** Enter comments.

Viewing Refund

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

To view Refunds navigate to the following path:



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

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

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

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

How to Issue Refund?

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

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

 Navigation: Home » Billing Manager » Documents » Payments

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

Account Statement

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

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

 Navigation: Home » Billing Manager » Statements

You can locate the client by searching via any credentials provided or by surfing page by page, select the client and you will be landed to the following interface which shows all of the related information for that particular client.

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

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

It shows the following listing:

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

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

 Navigation: Home » Billing Manager » Statements » Statement Detail

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

Viewing Online Payment

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

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



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

You can search payments based on following filter criteria:

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

Click **Search**.

Viewing On-Hold Payments

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

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



Select **Payments On Hold** tab.

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

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

Click **Search**.

Viewing Waiting Approval

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

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



Select **Waiting Approval** tab.

You can search waiting approval based on following filter criteria:

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

Click **Search**.

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

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

Viewing Pending for Transactions

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

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



Select **Pending For Transaction** tab.

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

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

Click **Search**.

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

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

Viewing Fraud Payment

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

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

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

Viewing Credit Card

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

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



It shows the following listings:

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

Viewing Transaction Logs

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

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

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

You can search transaction logs based on following filter criteria:

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

How to Register Offline Payment?

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

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



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

1. **Date Paid:** Select the date.
2. **Amount paid:** Enter the amount paid.
3. **Transaction ID:** Enter transaction ID or Cheque/D.D/P.O #.
4. **Payment Method:** Offline
5. **Is approved:** Tick means yes.
6. **Send e-mail confirmation:** Tick means yes.
7. **Comments:** Enter comments.

Click on **Save** button when done.

Adding Coupons

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

 Navigation: Home » Billing Manager » Coupon

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

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

Click **Save** when done.

Adjusting Customer Balance

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

 Navigation: Home » Billing Manager » Issue Credit

Select the customer, enter your reference number in **Reference number** box, enter the amount and then enter credit memo in the **comments** box. Click **Save** button.

Estimated Usage Report

Estimated Usage Report report shows estimated Azure Bill for CSP subscriptions along with customer and owner.

Navigation: Home » Billing Manager » Estimated Usage Report

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

1. Select **Company Name[Owner]**
2. **Microsoft CSP Service:** Provide customer name.
3. **Subscription Name:** Provide subscription name.
4. **Customer:** Provide customer name.
5. **Company name:** Provide company name

Click **Search** when done. You can **Export to excel** your 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 name you wish to calculate.

Navigation: Home » Customer Manager » Subscription List

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

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

You will be able to view details of the subscription you have clicked 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 Detail** showing detail per tenant along with customer name.

The path for Estimate detail is as below:

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

Billing Subscription Report

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

Navigation: Home » Billing Manager » Subscription Report

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

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

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

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

Tickets

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

The concepts involved are the following:

Active Ticket

Active ticket is a ticket waiting for a technician attention.

Waiting Ticket

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

Closed Ticket

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

Agent User

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

Departments

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

Email Parser

Email parser scans mailboxes and creates tickets out of emails.

Viewing Tickets

Both Resellers and Customers can view and manage their tickets using the control panel. To view ticket as reseller navigate to the following path:



Click on **Add New Ticket** button to create a new ticket. As an help desk agent you can perform following operation on a ticket:

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

New Ticket

To submit a new ticket navigate to following path:

 Navigation: Home » Help Desk » Tickets

Click **New Ticket** or you can also create your new tickets at following path:

 Navigation: Home » My Provider » Help Desk » New Ticket

Following fields should be completed:

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

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

Search Ticket

You may search for a ticket by

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

To search for a ticket, navigate to the following path:



On the top of page, there is Search box. Enter the value and click **Search** button.

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

Actions

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

To perform actions on tickets navigate to the following path:

Navigation: Home » Help Desk » Tickets

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

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

Change Page Refresh Interval

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

 Navigation: [Home](#) » [Help Desk](#) » [Tickets](#)

Block Email

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



Navigation: [Home](#) » [Help Desk](#) » [Tickets](#)

Managing Agents

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

How to add a staff member?

To add a staff member navigate to following path:

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

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

 Navigation: Home » Help Desk » Agent Users

Managing Help Desk Agents

Agent User

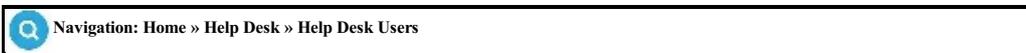
An agent user is help desk technician who receives and handles tickets. Once staff member is added navigate to the following path to activate him as Help Desk Agent and assign departments and permissions.

 Navigation: Home » Help Desk » Help Desk Users

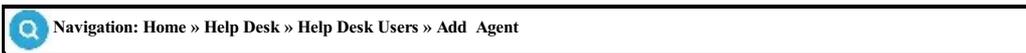
It displays the following listing:

1. **Agent Name:** It shows the name of the agent.
2. **Where ticket notice is sent:** It displays the email address of the agent.
3. **Title:** It shows the title.
4. **Designation:** It shows the designation of the agent.
5. **Options:** Agent users can be edited/removed by clicking on **Edit** or **Remove** respectively, allowing management of Help Desk agent users.

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

 Navigation: Home » Help Desk » Help Desk Users

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

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

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

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

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

Set Support Signature

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

 Navigation: [Home](#) » [Help Desk](#) » [Help Desk Users](#) » [Agent Users](#)

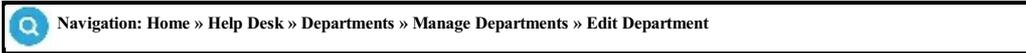
Viewing Manage Departments

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

 Navigation: Home » Help Desk » Departments » Manage Departments

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

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

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

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

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

Managing Departments

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

 Navigation: Home » Help Desk » Departments » Manage Departments

How to customize department's email?

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

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

To customize these template navigate to following path and click on Go link:

 Navigation: Home » Help Desk » Departments » Email Confirmations

Email Confirmations

For email confirmations navigate to:

 Navigation: Home » Help Desk » Departments » Email Confirmations

It displays the following listing:

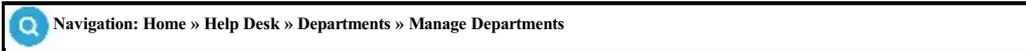
1. **Department Name:** It displays the name of the department.
2. **Description:** It shows the description of the department.
3. **Internal:** It displays its status as internal or not.
4. **Tickets:** It displays the number of the tickets.
5. **Options:** Select if you want email confirmation. Click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

Note: You can also clone, edit and remove.

To add new department click on **Add Department** button.

Add New Department

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



New department can simply be created by filling in the following relevant fields:

1. **Title:** Name for the department.
2. **Description:** Necessary details pertinent to the corresponding department.
3. **Email from address:** Specify sender's email address.
4. **Email from name:** Specify sender's name.
5. **Hours of inactivity to auto-close a ticket (0 is never auto-close):** Enter time to close in hours.
6. **Internal:** Internal department does not show up on new ticket form. It can be used to create private departments.
7. **Hours of inactivity to auto-close a ticket:** Mention the time period (in hours) of inactivity, later which the ticket will automatically be closed.

Finally, click **Save** button to continue.

General Settings

Here you may configure several help desk properties including auto-close setting, listing per page, ticket number prefix and postfix etc.



Navigation: Home » Help Desk » Settings » General Settings

You can view the following sections:

Challenge/Response:

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

Advanced Settings:

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

Click on **Save** button when done.

Challenge Response

Challenge Response is a feature that prevents SPAM emails from coming in.

How it works?

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

To configure challenge response system navigate to following path:



Make sure that **Require users to confirm registration** is checked and select the auto-kill interval from the drop-down box in front of **Kill e-mails that fail to respond to challenge e-mail after this time**. Killed e-mail is deleted.

Manage Status

Statuses regarding particular tickets can be manipulated from here:

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

Following parameters are displayed:

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

By clicking on **Edit** from following navigation path enables modification of statuses:

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

Similarly, statuses can also be Added by filling the following fields:

1. **Status Title:** Enter the title of the status.
2. **Sticky(Always on top):** Check or uncheck.
3. **Show in open Tickets:** Check or uncheck.

Then click the **Save** button.

Manage Priorities

Priorities regarding ticket can be manipulated from here:

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

Following parameters are displayed:

1. **Urgent:** Indicates that it has of high importance and critical.
2. **Normal:** Depicts priority with medium level importance.
3. **Low:** Depicts priority with Low level importance.

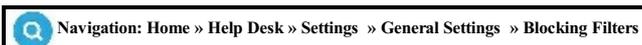
Customized priorities can be created by putting in the Title and clicking on **Save** button. By clicking on **Edit** from following navigation path enables modification of priorities:

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

Similarly, statuses can also be deleted by clicking on **Delete** .

Blocking Filters

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

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

Following parameters should be completed:

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

Customized blocking filters can be created putting in the **Block Value** and clicking on **Save** button. Clicking on **Edit** enables modification of blocking filters.

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

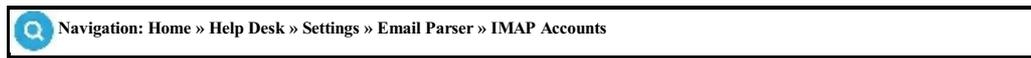
Configuring Email Parser

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

What is email parser?

Email Parser is a built-in feature which retrieves emails from POP3 accounts and generates tickets from them. For example, if you have a sales@xyzhost.com email address you may configure it in email parser so that whenever an email is received at this address a ticket is automatically generated.

To configure email parser navigate to following path:



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

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

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

Processing Rules

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

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

To create processing rule navigate to the following path:



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

IMAP Rules

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

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

To create processing rule navigate to following path:



Add IMAP Rule

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

1. **Rule name:** Provide rule name.
2. Select the Condition for your rule
 - i. **Where:** Select subject, body, sender or recipient etc.
 - ii. **Contains:** Specify condition for the rule.
3. Select the Action for your rule
 - i. **Forward to department:** Select department from the drop down list.
 - ii. **Assign To:** Select user.
 - iii. **Set Status:** Select the status of the ticket.
 - iv. **Override Priority:** Select priority.
 - v. **Delete Message:** Check or uncheck it.

Then click on **Save** button.

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

Managing Service Queue

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

To view service queue navigate to the following path:



The service queue screen displays following:

1. **In-Q:** Indicates the service provisioning is in the queue waiting for the provisioning. A service may remain In-Q if the subscription is unpaid or if the **Control Panel Provisioning Service** is stopped.
2. **Command:** Shows the task in the queue. It is usually in the following form at:
 - a. **Action Name:** If you see **Provisioning** Exchange then you knew it is the request to provision an exchange service.
3. **Customer:** The customer to which the service belongs.
4. **Owner:** It shows the name of the reseller.
5. **Details:** It shows following details for each Service queue job.
 - i. **Status:** Indicates the current status of the command.
 - a. **Error:** Indicates an error condition during the provisioning. Click on it to see the error detail.
 - ii. **Date Entered:** The date when item entered in the queue.
 - iii. **Tries:** Total number of tries to provision the service automatically.
 - iv. **Last Tried:** The date/time when service was last tried.
6. **Options:** Options column shows following button:
 - i. **Run:** Click on this button to attempt to provision service.
 - ii. **Control:** Click on this button to manually provision a service. This is very useful in two scenarios:
 - a. **Manual Provisioning:** For those services which cannot be provisioned automatically you can use **Control** button to provision. For example, Dedicated server provisioning.
 - b. **Provisioning Failed Orders:** If for any reason an order is failing to provision you may use the **Control** button to provision it.

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

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

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

Recycle Bin

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

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



Exchange mailboxes

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

Settings

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

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 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.

Group Jobs and Group Jobs Settings

To view Group Jobs you have to navigate to the following path:

Navigation: Home » Service Director » General » Group Jobs

Under **Group Jobs** tab will list all service type group Jobs in one interface and can be filtered for each service type. In order to allow service provider to configure number of group jobs to process and their respective priority, click on **Group Jobs Settings** tab:

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

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

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

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

Viewing Usage Reports (All)

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



Select **Usage Report** tab.

Microsoft Exchange

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

Microsoft CSP

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

VPS

1. VMs
2. View report

Skype4B

1. Organizations
2. Users
3. View SPLA Report

Active Directory

1. Organizations
2. Users

Microsoft SharePoint

1. Portals
2. Users
3. View SPLA Report

Microsoft CRM

1. Organizations
2. Users
3. View SPLA Report

Work Folders Hosting

1. Organizations
2. Work Folders

RDS Hosting

1. Organizations

Web Hosting

1. Domains

2. Plesk Domains
3. View report

Quota Over Used

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

1. Clients
2. Quota Over Usage report

Quota Over Usage report

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

Navigation: Home » Service Director » General » Reports

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

You will land on following page:

Navigation: Home » Service Director » General » Quota Over Usage report

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

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

Usage Reports Schedule

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

 Navigation: Home » System Configuration » General » Reports

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

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

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

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

Once done click on **Save** button.

Sell Bulk Add-ons To Customers

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

 Navigation: Home » Service Director » General » Reports

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

You will land on following page:

 Navigation: Home » Service Director » General » Quota Over Usage report

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

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

Click **Save** when done.

Email Log

To view email log, navigate to the following path:

 Navigation: Home » Service Director » General » Email Log

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

It displays following listing:

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

Dedicated Hosting

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

 Navigation: Home » Service Director » General » Dedicated Servers

Manage: Click on Manage to manage dedicated servers.

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

Active Directory Organizations

Active Directory Organizations are organizations created by Control Panel on the selected active directory domain.

Control Panel gives the provider option to create organization unit and users under that organization unit without having to subscribe to any service. Later, when the organization requests for any service, provider can enable services on the existing organizations.

To view Organizations navigate to the following path:



To search an active directory organization:

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

Then, click **Search** button.

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

1. **Organization Name:** It is the name of the organization.
2. **Users:** It displays the number of users in organization.
3. **Active Directory Domain:** It is active directory domain name under which this organization exists.
4. **Customer:** It is name of the customer who owns the organization.
5. **Subscriptions:** It shows the subscription to which the organization has been subscribed. Icon for each subscription displays that either the service is activated or it is deactivated.
6. **Options:** You can 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 fro 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.

Add Active Directory Organization Unit

To view Active Directory Organization Unit click on **Add Organization Unit** button.

 Navigation:Home » Service Director » Active Directory » Organizations

Click **Add Active Directory Organization** to add new Active directory organization. It displays the following listing:

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

Click **Save** when done.

Logon Hours Template

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

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

Navigation: Home » Service Director » Active Directory » Organizations

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

It show following Listing:

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

Add New template

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

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

Click **Save** when done.

Security Groups

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

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

Navigation: Home » Service Director » Active Directory » Organizations

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

It show following in the listing:

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

Add Security Groups

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

1. **Display name:** Provide display name.
2. **Group Members:** Select users
3. **Group Scope:** It shows following option: Domain Local, Global, Universal
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:

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 **Enable/Disable ADSync**.

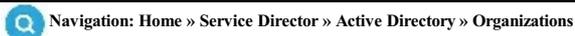
In Active Directory Organizations if you **Enable ADSync** on any organization, a pop-up shown will appear to select ADSync Template.

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

Click on **Save** button when done.

Default Settings (AD Password policy)

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

 Navigation: Home » Service Director » Active Directory » Organizations

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

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

AD User Password

Options: You can select one of the option below:

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

Password Policy

- **Select Policy:** Select [password_policy](#) from the dropdown list.

Logon Hours Template

- **Select Template:** Select [logon_hours_template](#) from dropdown list.

Other configuration

1. Update Profile Allowed: Checkbox
2. Change Password Allowed: Checkbox
3. Unlock Account Allowed: Checkbox

Click **Save** when done.

Add AD Password Policy

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

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

Navigation: Home » Service Director » Active Directory » Organizations

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

Under **Settings** tab now click **Password Policies** tab

Add Policy

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

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

Click **Save** when done.

Enrollment

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

 Navigation: Home » Service Director » Active Directory » Organizations

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

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

Enrollment Options:

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

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

Click **Save** when done.

Viewing Active Directory Users

To view users navigate to the following path:

 Navigation: Home » Service Director » Active Directory » Users

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

Then click on **Search** button.

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. **Active Directory Domain:** It is active directory domain name.
 - iv. **Customer:** It is name of the customer.
 - v. **Logon Hours Template:** It shows if logon hour template is assigned.
4. **Subscriptions:** It shows the subscriptions for e.g. Ex, Skype4B, CRM.
5. **Options:** It shows following option for AD user
 - i. Edit
 - ii. Clone
 - iii. Change Password
 - iv. 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. **Customer:** Select customer from the drop down list.
2. **Organization Unit:** Customer's organization unit will automatically be displayed.
3. **First Name:** Enter first name of the user
4. **Last Name:** Enter last name of the user.
5. **User Display Name:** Enter user display name.
6. **User Principal Name:** Enter user principal name.
7. **Email:** Enter email of the user.
8. **Password:** Enter password.
9. **Confirm password:** Retype password.
10. **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 setting**: 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 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 database:** Select exchange database.
10. **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.
11. **Language:** Select locale of mailbox.
12. **Time zone:** Select time zone.
13. **Alternate email:** Provide alternate email for AD user self-service to reset passwords/forgotten password.
14. **Hide from Exchange Address Lists:** Select 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:



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.

Select **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

Active Directory Plan Management

Active Directory plans are created through powerful Service Plan Wizard. To create a Active Directory plan navigate to following path:

Navigation: Home » Service Plans » Active Directory

Note: You can also edit existing Active Directory plans by clicking on the **Edit**.

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

1. **Product Type:** Select **Active Directory** from the drop-down list.
2. **Product Name:** Enter the name of your product.
3. **Select Active Directory:** Select your desired Active Directory from the drop down list.
4. **Is Active:** Select No if you want to disable this product selling.
5. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
6. **Associate Addon:** You may want to associate addon with this product. Select Yes or No.
7. **Associate Domain:** Select how you want to associate domains with this product. Your choices are:
 - o Required
8. **Sync sold plan resources:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings.
9. **Product Comments:** Enter any comments you to associate with this product. These comments show up on the store-front when this product is selected.

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

Resources: On step-2 you will set the resources for Active Directory plan.

1. **No. Of Organization Units:** Provide number of organization units.
2. **No. of Security Groups:** Provide number of security groups.
3. **No. of Active Directory Users:** Provide number of active directory users.
4. **No. of ADSync Enabled Users:** Provide number of adsync enabled users.
5. **On Organization unit creation, create Security Group(s):** Check if you want to create Security Groups.
 - o Click **Security Group** button and add security group(s).
6. **Make New Security Group Created Member of following Group(s):** Check if you want to make New Security Group Created Member of following Group(s).
 - i. Select Security Group(s):
 - ii. Type to search
 - iii. Selectable

Click **Next** button.

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

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

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

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

- a. Setup Price
- b. Price
- c. Discount

Enter prices in each box.

Possible Product Upgrade / Downgrade: Here you may configure the upgrade and downgrade behavior of this

product. When a product is purchased, your client may perform upgrade/downgrade from their control center without your involvement.

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

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

Add ADSync Templates

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

Navigation: Home » Service Director » Active Directory » ADSync Templates

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

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

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

Click on **Save** button when done.

ADSync Usage Report

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

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

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

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.

Usage Report for Active Directory

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

Control Panel supports for Hosting Panel

1. Hostmatic Control Server
2. Plesk

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

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

Hosting Accounts

To view Hosting accounts navigate to the following path:

 Navigation: Home » Service Director » Web Hosting » Accounts

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

1. **Subsc.ID:** Enter the subscription ID.
2. **User name:** Enter user name.
3. **Domain Name:** Enter domain name.
4. **Status:** Select status.
 - i. Active
 - ii. On-Hold
 - iii. Pending
 - iv. Graced
 - v. Expired

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

The list displays the following:

1. **Status:** This shows the status of web hosting account.
2. **Subscription ID:** This is unique ID assigned to the subscriptions.
3. **Domain Name:** Specifies the name of corresponding domain.
4. **Package:** This shows the name of product plan assigned to the subscription.
5. **Provider name:** It shows the provider i.e. Hostmatic Control Server or Plesk.
6. **Customers ID:** It shows the customer name along with customer ID against the subscription.
7. **Options:** Click on **Manage** to [manage server service](#).

Hostmatic Overview

Click on **Manage** for any account to show options to manipulate and manage corresponding hosting account. To view Service Management link for hosting accounts navigate to the following path:



You will be on following navigation path after clicking on Service Management link:



Service Control 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:

Turn On/Off	Lets you turn the domain On/Off.
Sub-Domains	Lets you add new sub domain and manage the existing ones.
Domain aliases	Lets you add new domain aliases or manage the existing ones.
Limits	Lets you manage quota limits for the domain.

Hosting Management: These are the detailed options available in Control Panel associated with traditional hosting or shared web hosting. Below is list of options you can manage under Hosting Management section:

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

ODBC DSN	Lets you manage ODBC DSN on the domain being managed.
File Manager	Lets you manage File Manager on the domain being managed.
Website Stats	Lets you view/manage Website Status on the domain being managed.
DNS	Lets you manage DNS on the domain being managed.
Shared SSL Links	Lets you manage SSL Links on the domain being managed.

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

Turn On/Off	Lets you turn the mail domain On/Off.
Mail Domain Alias	Lets you manage Mail Domain Aliases on the domain being managed.
Email Accounts	Lets you manage Email Accounts on the domain being managed.
Email Lists	Lets you create/remove email lists on the domain being managed.
Email Groups	Lets you add/remove email groups on the domain being managed.

General Settings

To view general account details navigate to the following path:

 Navigation: Home » Service Director

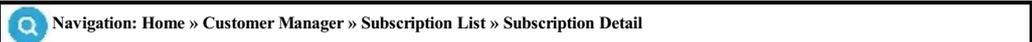
Select one of following service:

1. Web Hosting
2. Hosted Exchange
3. Hosted SharePoint
4. Hosted CRM
5. Hosted Skype for Business
6. Hyper-V Hosting
7. Microsoft CSP
8. Windows Work Folders Hosting
9. RDS hosting

Go to **Accounts**. Click on **Manage**. Under **General Settings** tab

You can see **Subscription Limits** showing the used and available resources for each service.

Also you can see **Subscription ID**, click on it. Once you click the **Subscription ID** you will be on following navigation path:

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

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

You will be presented different tabs to related to each service. See more on [Subscription Detail](#).

You can see **Customer name** and ID, click on it. Once you click the Customer name you will be on following navigation path:

 Navigation: Home » Customer Manager » Customers » Customer Detail

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

You will be presented different tabs to related to each customer. See more on [Customer Detail](#).

Domains

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

 Navigation: Home » Customer Manager » Subscriptions » Subscription Detail

It shows the following fields:

1. **Domain Name:** It displays the domain name.
2. **IP Address:** It displays the IP address.
3. **Sub-Domains:** It shows the sub-domains.
4. **Allocated Disk:** It shows allocated disk space. (MB)
5. **Options:** In option you can Edit, Manage, Delete and Assigned dedicated IP links

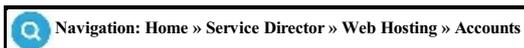
Click on **Add New Domain** button to add a new domain to shared hosting.

1. **Domain Name:** Provide domain name.
2. **Disk Space allowed In:** Select space in GB.
3. **Activate mail service:** Check or uncheck it.
4. **Subscribe to:** Select from the drop down list Physical web hosting or URL forwarding.

Then click on **Save** button.

Mail Domain Alias

For listing the aliases of mail domains navigate to following path:

 Navigation: Home » Service Director » Web Hosting » Accounts

Click **Manage** in front of "Hosting account" or "Mail Only Subscriptions". It shows the following listing:

1. **Mail Domain Alias:** Displays the name of the mail domain.
2. **Options:** Remove discards the specific mail domain.

Click on **Add Mail Domain** button to add a new domain. Provide **Domain Alias Name** and click on **Save** button when done

Manage DNS Zones

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

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](#)

Mail 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 Mail service using turn on/off feature by navigating to following path:

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

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.

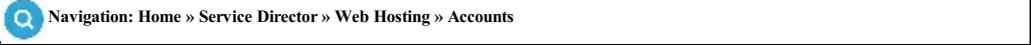
"Service is Running. Would you like to Stop it?"

Click **Yes** or **No**.

Sub domains

A sub domain is a domain that is part of a larger 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:

 Navigation: Home » Service Director » Web Hosting » Accounts

Click **Manage** in front of the subscription. To add a sub-domain click on **Add Sub Domain** button to include more sub domains.

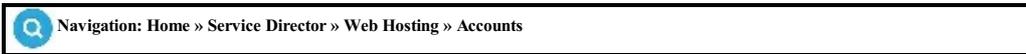
1. **Sub-domain:** Provide sub domain.
2. **FTP Users:** Select FTP users from the drop down list or create new.
3. **FTP Login Name:** Provide FTP login name.
4. **FTP Password:** Provide password.
5. **Confirm password:** Retype password.

Click on **Save** button when done.

Domain Aliases

Domain name aliases are additional domain names associated with your primary domain and function with your current set of user accounts. This will help you access all e-mails addressed to domain aliases in your primary account.

Domain aliases can be viewed, added or modified as per requirement by navigating to:



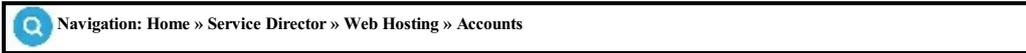
Click **Manage** in front of the subscription. Click on **Add Domain Alias** button to include more sub domains.

1. **Domain Alias Name:** It shows the name of the domain alias.
2. **Options:** You can remove the domain alias from options.

Click **Save** for changes to take effect.

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** in front of the subscription. 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](#) » [WebHosting](#) » [Accounts](#)

Click on **Manage** in front of the subscription. Click on the **Website Settings** to configure website settings.

1. **Read:** Set read permissions in IIS.
2. **Write:** Set write permissions in IIS.
3. **Directory browsing:** Allow browsing of directory structure.
4. **Execute Permission:** Enable and allow execution of scripts/extensions.
5. **Disable IIS Logging (For Domain(s)):** Check this box to disable IIS logging.
6. **Allow anonymous access:** Allows anyone to visit the public areas of website.
7. **Enable Integrated Windows authentication:** Integrated Windows authentication does not initially prompt for a user name and password. The current Windows user information on the customer is used for Integrated Windows authentication.
8. **Enable basic authentication:** Collects user name and password and send in an unencrypted form.
9. **Application Pool:** Name of the application pool that contains one or more applications run.
10. **Maximum CPU Usage:** Mention percentage for peak utilization of System CPU.
11. **Maximum Network Use (KB/S):** Enter network bandwidth usage.
12. **Connection limited to:** Specify connection limitation.

Click **Save** when done.

Default Documents

You can establish a default document for client requests to Web site that does not specify a document name. Default documents can be a directory's home page or an index page. You may add/extend support for default documents by simply navigating to:

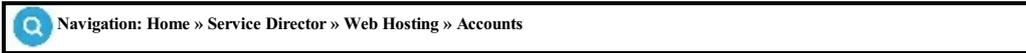


Click on **Manage** in front of the subscription. Clicking on **Add New Document** will allow you to add up new default document that will now be supported. You can also delete an existing default document by clicking on **Delete** button.

Simply click on **Save** button for changes to take effect.

URL Redirection

You can make a web page available under multiple URLs by utilizing URL Redirection feature. Navigate to the following path:



Click on **Manage** in front of the subscription. Click **URL Redirection**. 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 on **Manage** in front of the subscription. Click on the **Custom Errors** to get to this option. It displays the following listing:

1. **Http Error:** It displays the HTTP Error.
2. **Type:** It displays the type of response.
3. **Contents:** It displays the content.
4. **Default IIS Template:** It shows that the error is default or not.
5. **Operation:** You can **Edit** and **Set IIS Default Template**.

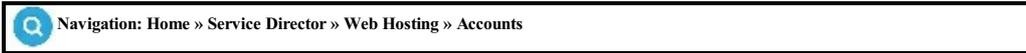
Click on **Edit** to configure the currently selected custom error message.

1. **Status Code:** Provide status code.
2. **Prefix Language File Path:** Provide language file path.
3. **Path:** Provide path.
4. **Response mode:** Select preferred response mode.
 - a. Absolute path
 - b. Executable path
 - c. URL

Click on **Save** button to save changes. Clicking on **Set to Default** will load the default template.

MIME Types

With Multipurpose Internet Mail Extensions (MIME), you can create file formats that will be used during e-mail exchange. Navigate to following path for listing and adding MIME types:



Click on **Manage** in front of the subscription. Click **MIME Types**. 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 on **Manage** in front of the subscription. Click **Virtual Directory**. 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:

 Navigation: Home » Service Director » Web Hosting » Accounts

Click on **Manage** in front of the subscription. Click **Scripting**. Following scripting languages are supported:

- i. ASP Support
- ii. ASP.NET Support
- iii. PHP Support
- iv. Perl Support
- v. Python Support
- vi. ColdFusion Support

Installed: Shows the status if the support for the specific scripting language is installed or not.

Options: You can install/remove and enable/disable support for a scripting language.

Once done, it will add scripting language extensions to the domain in IIS, based on the extensions you specified in the IIS.

FTP Users

Please navigate to following path for adding and configuring FTP users:

 Navigation: Home » Service Director » Web Hosting » Accounts

Click on **Manage** in front of the subscription then click **FTP Users**. Click on **Add FTP User** button 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

Databases that can be configured are listed at:

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

Click on **Manage** in front of the subscription then click **Databases**. Click on **Add Database** button to create another database.

1. **Provider:** Mention your MS SQL version.
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 DSN

For ODBC DSN configuration navigate to following path:

 Navigation: Home » Service Director » Web Hosting » Accounts

Click on **Manage** in front of the subscription. Click **ODBC DSN** and then click **Add ODBC DSN** button. Fill in the following fields:

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

Select **File Manager**.

Operations In File Manager

Following Operations can be performed in File Manager:

1. **Sync:** Default folders created and used by Control Panel cannot be removed, renamed, cannot change permissions. You can Sync the folders by clicking on **Sync** icon.
2. **Add Folder:** Click on **Add a Folder** icon to add a new folder. You can also add folders inside a folder.
3. **Create Text File:** Select Folder and click on Create Text File icon. You can also Edit and preview Text file.
4. **Copy Files:** Select File to copy and click on Copy Folder(s) / File(s) icon.
5. **Move Files:** Select File to move and click on Move Folder(s) / File(s) icon. Select folder from tree list to move files.
6. **Rename:** Select File to rename and click on Rename icon.
7. **Delete Folder(s)/File(s):** Select Folder(s)/File(s) to be deleted and click on delete Folder(s)/Files(s) icon.
8. **Upload/Download:** Select Folder/Files and click on Upload / Download icon.
9. **Zip/Unzip:** Similarly, Select Folder/Files and click on Create Zip/UnZip icon.

Shared SSL Links

Control Panel provides shared SSL link to its web hosting users.

To view Shared SSL links navigate to the following path:



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

SOA

SOA: Start of Authority (SOA) defines the zone name, an e-mail contact and various time and refresh values applicable to the zone. For SOA configuration, navigate to following path:



Click on **SOA record** tab.

1. **Refresh Interval:** Enter the refresh period i.e. the frequency with which the data should be checked by a secondary name server.
2. **Retry Interval:** The retry period i.e. how often a failed attempt to connect should be retried.
3. **Expire Interval:** How soon the data should expire if it hasn't been refreshed.
4. **TTL:** The default minimal Time To Live (TTL) of the data.

Website Stats

To view website stats navigate to the following path:

 Navigation: Home » Service Director » Web Hosting » Accounts

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

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

DNS

For DNS configuration navigate to following path:



Click on **Manage** in front of the subscription. Click **DNS**. Click on **Add DNS Record** button to include DNS entry.

1. **Record Type:** Select the type of resource record such as NS, A, MX 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 name.
 - 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. **Host:** A Fully Qualified Domain Name (FQDN) is the complete domain name for the target host.

Click **Save** button to update changes. [Click here](#) to manage SOA record.

Temporary URL

To enable Temporary URL navigate to the following path:

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

Click on **Manage** in front of the subscription. Click **Temporary URL** and click enable/disable.

Email Management

Please navigate to following path to access Email Management section:

 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](#)

E-mail Accounts

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



Click on **Manage** in front of "Hosting account" or "Mail Only Subscriptions". Email accounts list shows following details:

1. **Status:** It displays status.
2. **Display Name:** Display name of email account.
3. **E-mail:** E-mail address assigned to e-mail account.
4. **Size(MB):** Disk space allocated for e-mail account.
5. **Auto responder:** It shows auto responder enabled or disabled.
6. **ActiveSync:** It shows active sync enabled or disabled.
7. **Options:** It shows **Remove** option for the e-mail account.

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

1. **E-mail Account:** E-mail address assigned to that e-mail account.
2. **New Password:** Enter password for current e-mail account.
3. **Confirm Password:** Re-enter same password for confirmation purpose.
4. **Mailbox Size (MB):** Usage space or e-mail quota.

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

E-mail Lists

A list of e-mail addresses identified by a single name, such as mail@companyname.com is an e-mail list.

You may configure e-mail lists at:

 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.

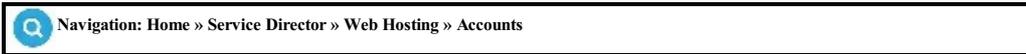
1. **List Name:** Provide list name.
2. **List moderator:** Select list moderator from dropdown.
3. **List type:** Select list type i.e. Unmoderated or Moderated.
4. **Description:** Provide description.
5. **Allowed posters:** Select posters.
6. **Posting requires password:** Provide password.
7. **List 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.

Email Groups

Groups of people having common interests can participate in discussions using e-mail.

For enlisting and configuring e-mail groups navigate to:



Click on **Manage** in front of "Hosting account" or "Mail Only Subscriptions". It displays following in the listing:

1. **Display name:** It displays group name.
2. **Members:** It shows member added to group.
3. **Options:** It shows option to remove the email group.

Click on **Add Email Group** button.

1. **Email group name:** Provide email group name.
2. **Group Members:** Select group members
3. **Group Email Address:** Provide email address.
4. **Enabled:** Check box

Finally click **Save** button.

Viewing Database Only Subscriptions

To view database only subscriptions navigate to the following path:



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:
 1. Manage Databases
 2. 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.

Shared Hosting Plan Management

Control Panel Supports shared hosting plans provisioning Hostmatic Control Server only.

Hosting Plans are created through powerful Service Plan Wizard. To create a hosting plan, navigate to following path:



Note: You can also edit existing shared hosting plans by clicking the **Edit** at desired plan that you want to modify.

There are separate tabs for customer product listing and add-ons management.

1. [Customer Product Listing](#)
2. Add-on Management

To create a new product click on **Add New Product** button under reseller product listing /product listing tab. Select the desired hosting product from the drop down list.

1. **Product Type:** Select **Shared Hosting** from the drop-down list.
2. **Control Panel:** If you select Shared Hosting or Reseller Hosting product type then you will see this box. It lets you select the control panel you are using for the product provisioning.
3. **Server Group:** If you select Shared Hosting or Reseller Hosting product type then you will see this box. It lets you select the server group where this package will be provisioned.
4. **Product Name:** Enter the name of your product.
5. **Select Package Type:** You need to select one of following package type:
 - i. Web Hosting
 - ii. DNS Only
 - iii. Database Only
 - iv. Mail Only
6. **Is Active:** Select No if you want to disable this product selling.
7. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
8. **Associate Addon:** You may want to associate addon with this product. Your choices are:
 - a. Optional
 - b. Required
 - c. Suppressed
9. **Associate Domain:** Select how you want to associate domains with this product. Your choices are:
 - a. Optional
 - b. Required
 - c. Suppressed
10. **Date:** This is date set by the system (not editable).
11. **Product Comments:** Enter any comments you want to associate with this product.

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

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

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

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

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

1. Setup Price
2. Price
3. Discount

Enter prices in each box.

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

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

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

1. Click [Dedicated Hosting](#) to view dedicated hosting plan management.
2. Click [SSL Hosting](#) to view SSL hosting plan management.

Usage Reports

You can view Usage Reports for Webhosting accounts. To view Usage reports navigate to following path :

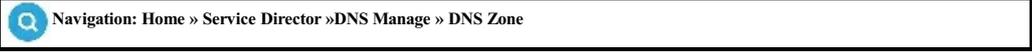
 Navigation: Home » Service Director » Web Hosting » Usage Report

Under **Usage Summary** tab, it shows following listing:

1. **Domain Name:** It shows the domain name of webhosting account.
2. **Customer:** It shows the customer name along with id.
3. **Product name:** It shows the product name.
4. **Sub-Domains:** It shows the number of sub-domains.
5. **FTP:** It shows FTP Users
6. **Mail Domains:** It shows the umber of mail domains.
7. **MailBoxes:** It shows the number of mailboxes.
8. **DNS Zones:** It shows the DNS zones.
9. **MYSQL:** It show MYSQL server enabled.
10. **Web Stats:** It shows webstats enabled.
11. **Website Quota Set (MB):** It shows Website quota set in MBs.
12. **Website Quota Used (MB):** It shows Website quota used in MBs.
13. **Dedicated IP Addresses:** It shows the dedicated IP addresses.

Add DNS Zone

To add a new DNS zone navigate to the following path:

 Navigation: Home » Service Director » DNS Manage » DNS Zone

To search a DNS zone provide the following fields Owner, DNS Server, Domain Name, Customer ID, Customer Name, Status and click **search** button.

It displays the following listings:

1. **Status:** It shows the status of the DNS zone.
2. **Domain Name:** It shows the domain name.
3. **Customer:** It shows the customer name along with id.
4. **DNS Server:** It shows the DNS server.
5. **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

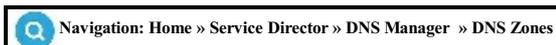
Click **Add Bulk DNS Zones** and provide following:

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

Click **Save** when done.

Web Redirect

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

 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

(OR)

1. **Select DNS Zones:** or Select zones
2. **Select Rule Option:** Select Default Rule or specify Host Name.
3. **Redirect Url:** Provide redirect URL.

Click **Save** when done.

Domain Names

Control Panel has complete integration of various Domain Name Registrars. Reseller can configure a domain registrar in control panel and allow users to register domain names. When a domain is registered using the control panel, users can avail facility of managing the domain name and perform different operations.

An array of IP addresses may point to a domain name. Domain names are enlisted here:



You can search domain name by following:

1. **Subsc.ID:** Enter subscription ID.
2. **Domain Name:** Enter domain name.
3. **Status:** Select status.
 - i. Active
 - ii. On-hold
 - iii. Pending
 - iv. Expired

You will see the following listing:

1. **Subscription ID:** It displays the subscription ID.
2. **Domain Name:** It displays the domain name.
3. **Customer ID:** It displays the customer id.
4. **Customer Name:** It displays the customer name.
5. **Company Name:** It displays the customer name.
6. **Manage:** Click on this button to manage domain name.

Clicking on **Manage** 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:



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. **Customer:** It shows customer Id and name.
3. **Options:** It shows option to Edit/remove the contact.

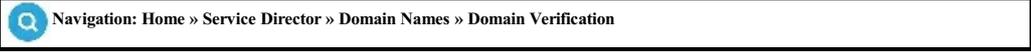
To add new contact click **Add Contact**.

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

Click **Save** when done.

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. Customer Name
2. Company name
3. TLD Name
4. Domain Name
5. Registrar
6. Expiring in no of days

You can also **Export to Excel** the Expiring domain usage report.

1. **Domain Name:** It shows domain name.
2. **Next Renewal:** It shows next renewal date.
3. **Customer:** It shows customer ID & name.
4. **Registrar:** It shows the registrar in use.
5. **Domain lock status:** It shows domain status.

Under **Detailed Usage** tab you will see the following listing:

You can search domain name by following:

1. Customer Name
2. Company name
3. TLD Name
4. Domain Name
5. Registrar

You can also **Export to Excel** the detailed usage report.

1. **Domain Name:** It shows domain name.
2. **Next Renewal:** It shows next renewal date.
3. **Customer:** It shows customer ID & name.
4. **Owner:** It shows owner name.
5. **Registrar:** It shows the registrar in use.
6. **Domain lock status:** It shows domain status.
7. **Admin email:** It shows admin email address.
8. **Billing Email:** It shows billing email address.
9. **Technical Email:** It shows technical email address.

Exchange Hosting

Control Panel allows Exchange reporting, auditing and specific role based groups in Exchange Hosting. The purpose of this document is to elaborate Reporting/Auditing & RBAC features for Exchange Hosting module and to facilitate you towards friendly adoption of Control Panel environment.

Reports

You can view SPLA Reports and 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.

Orchestration Module for Microsoft Exchange

Control Panel allows Hosted Exchange Service through its Orchestration Module for Microsoft Exchange. Automation Module for Exchange is designed for all sizes of service providers wanting to start or grow their Hosted Exchange business while minimizing ongoing support costs.

Orchestration Module for Exchange fully automates and controls service delivery on Microsoft Exchange 2019 and its legacy versions, manages billing and provides self service control panel. Control panel supports following versions of Microsoft Exchange.

1. Microsoft Exchange 2007
2. Microsoft Exchange 2010
3. Microsoft Exchange 2010 Hosted
4. Microsoft Exchange 2013
5. Microsoft Exchange 2016
6. Microsoft Exchange 2019

Note: Please make sure you have subscribed to Orchestration Module for 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 Account navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Accounts

In order to Fix security permissions for all the organization, click on **Fix Security Permissions for all Organizations** button.

In order to Sync your all organization, click on **Sync data from backend for all Organizations** button. You can also [Enable Litigation Hold](#) for exchange accounts.

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

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

1. **Status:** It shows the status of account.
2. **Subsc.ID:** This is unique ID assigned to the subscriptions.
3. **Mail Domain:** The name of SMTP domain.
4. **Package:** It shows the name of package assigned.
5. **MailBoxes:** Total number of exchange mailboxes created in the organization.
6. **Customer:** It shows the customer name along with id.
7. **Owner:** It shows the name of owner.
8. **Options:** Click on **Manage** to [manage exchange service](#).

Viewing Exchange Organizations

Exchange organizations are basically mail enabled active directory organizations.

To view exchange organizations navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on the **Subsc. ID** or **Mail Domain** name. Once you click the subscription name, you will be on following navigation path:

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

Select **Exchange Organizations** tab. You can include new organizations by clicking on **Add New Organization** button. [Click here](#) to see how to add a new organization.

The list of exchange organization displays following:

1. **Status:** This shows the status of exchange hosting account.
2. **Mail Domain:** The primary SMTP mail domain name created for the organization.
3. **Organization Name:** It shows the name of Exchange Organization.
4. **MailBoxes:** Total number of exchange mailboxes created in the organization.
5. **Options:** You have option to **Manage** or **Delete** for desired organization.

Only the exchange organizations under the customer of logged in provider will be listed.

To view exchange organizations for customers under any reseller, you must login as that reseller.

Enable Litigation Hold

Organizations may need to preserve all email related to a specific topic or all email for certain individuals. In order to enable litigation hold in bulk, navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Accounts

Select **Enable Litigation Hold** button and provide following:

1. **Organizations:** Type to search an organization and select
2. **Enable litigation hold for all mailboxes within Organization:** Check if required.
3. **Litigation Hold Duration (days):** Provide number of days.
4. **Litigation Hold Date:** Select Starting date.

Click **Save** when done.

In order to enable litigation hold for selected mailboxes under exchange **Accounts**, click on **Manage** and then select **Compliance Management** tab. Now select **Litigation Hold** tab.

Note: Litigation hold is available for Enterprise and Enterprise Plus mailbox.

Click **Enable**.

1. **Mailboxes:** Select mailboxes from Selectable
2. **Litigation Hold Duration (days):** Provide number of days.
3. **Litigation Hold Date:** Select Starting date.

Click **Save** when done.

Allow Customers to Enable/Disable litigation Hold:

Enable litigation Hold is an enterprise feature. To allow **Customers** to "Enable/Disable litigation Hold" on mailboxes, you can check/uncheck this option under "Exchange Service Plans" navigate to following path:

To create a hosted email plan navigate to following path:

Navigation: Home » Service Plans » Exchange

Under **Resources** tab you can check the option **Enable litigation Hold**.

Note: You can also edit existing hosted email plans by clicking on the **Edit**. and **Sync sold plan resources**.

If this **Sync sold plan resources** checkbox is checked, product name, comments, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox settings.

Add New Organization

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



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 e-mail service on it.
2. **Organization Name:** The active directory name of the organization. With the name an active directory organizational unit is created for the organization.
3. **Domain Name:** The primary SMTP mail domain name created for the organization.
4. **Address1:** Provide Address.
5. **City:** Provide the name of the city.
6. **State:** Provide the name of the state.
7. **Zip:** Provide the zip code.
8. **Country:** Provide the name of the country.
9. **Description:** Provide description of the organization.

Click on the **Save** button to create the organization.

Hosted Email Service Management

Orchestration Module for Microsoft Exchange activates rich web based interface for the management of hosted email service. Using the web interface the provider and the end-user may perform routine management task without the need of going at the exchange server or active directory.

To view Exchange organizations navigate to the following path:



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 Calendar Permissions](#), [Sync Data form 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 Disclaimer Management](#)
8. [Compliance Management](#)
9. [Spam Filters Management](#)
10. [Mobile Device Mailbox Policy Management](#)
11. [Application Impersonation](#)
12. [Calendar permissions](#)

Export Mailbox Permissions

Control panel can export mailbox permissions to excel sheet. To export mailbox permissions, navigate to the following path:



Click **Manage** in front of the organization under which you want to export mailbox permissions. Click **Export Mailbox Permissions** button.

Sync Data from Backend

Sync from backend is there to sync data from backend for an organization where you have created new mailboxes or other object directly on backend for an organization that exists in control panel. This operation will add those mailboxes/objects into Control Panel, however if you delete a mailbox directly from backend and use Sync operation, the mailbox will not get cleared from the control panel since it's a one way process to add items to control panel, not delete them based on changes in backend.

To sync data from backend, navigate to the following path:

 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

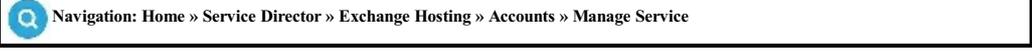
Update Recipient Settings

Control panel can update recipient settings. To update recipient settings, navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Accounts

Click **Manage** in front of the organization under which you want to export mailbox permissions. Click **Update recipient settings** button.

A new tab will open under following path:

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

Import settings

1. **Select mailboxes data file:** Select file
2. **Select distribution lists data file:** Select file
3. **Select mail contacts data file:** Select file
4. **Auto create new recipient when not found:** Check box

Click **Save** when done.

Viewing Mail 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:

1. **Mail Domain:** This shows the name of SMTP domain. Click on the domain name.
 - i. **Domain:** For example customerdomain.com. You can also set it default.
 - ii. **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.

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.

Add SMTP Domain

To add an SMTP domain navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **Mail Domains** tab. Enter the new SMTP domain name in Add new SMTP domain box and click on **Add New Domain** button.

Delete SMTP Domain

To delete an SMTP domain navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **Mail Domains** tab. Click on the **Delete** button in front of SMTP domain which you wish to delete.

Viewing Mailboxes

Mailboxes are mail addresses which are used to send and receive emails. To view mailboxes navigate to the following path:



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

You can add new mailbox by clicking on the [Add New Mailbox](#) button or you can add bulk mailboxes by clicking on **Add Bulk Mailbox** and **Add Bulk Linked Mailbox** button. You can perform group actions on the mailboxes by clicking on the **Group Actions** button. You can also remove an export bulk failed mailboxes by clicking on **Remove and Export Bulk Failed Mailboxes**.

The list of mail boxes displays following:

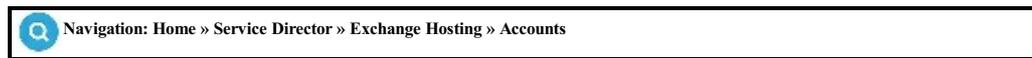
1. **Display name:** The mailbox name such as Room Mailbox.
2. **User Principal Name:** The domain user name for this mailbox as it displays in OWA and in from address when sending mail.
3. **Email:** The email address for the mailbox.
4. **Disk Space Allowed:** Total mailbox size in Kilobytes.
5. **Status:** Only Active mailboxes can send and receive mails.
6. **Options:** It shows the following two options:
 - i. **Disable:** Click this button to disconnect the mailbox.
 - ii. **Remove:** Click to delete the mailbox from exchange.
 - iii. **Remove an Delete AD user:** This option will remove the mailbox from exchange as well as AD user.
 - iv. **PST Export:** This will export mailbox to PST.

Note: To view and manage more details and features of the mailboxes click on the mailbox display name.

Add User Mailbox

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

To add a new mailbox navigate to the following path:



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

Select one of the following Mailbox:

1. **User mailbox:** Most common type of mailbox should be selected commonly.
2. **Linked mailbox:** Linked mailboxes are mailboxes that are accessed by users in a separate, trusted forest. Linked mailboxes may be necessary for organizations that deploy Exchange in a resource forest. [Click here](#) to add a Linked mailbox.
3. **Room mailbox:** Special type of mailbox for reserving rooms etc. [Click here](#) to add a room mailbox.
4. **Equipment mailbox:** Special type of mailbox for equipment. [Click here](#) to add a equipment mailbox.
5. **Shared mailbox:** Special type of mailbox for Exchange 2013 or later. [Click here](#) to add a shared mailbox.

The add mailbox screen displays following:

1. **Mailbox Template:** Select Mailbox template from the dropdown.
2. **Mail enable active directory user:** Exchange user for which you want to enable the service.
3. **Full Name (Display name):** The mail box name as it displays in OWA and in from address when sending mail.
4. **Primary Email:** The email address for the mailbox. For example, sales.
5. **Mailbox Type:** It shows the type of mailbox selected.
6. **Password:** Enter the password you would like to set for this mailbox. See Also: [Add Password Policy](#)
7. **Full Access (Auto-Mapping Enabled):** Assign permissions to mailboxes on this user.
8. **Full Access (Auto-Mapping Disabled):** Assign permissions to mailboxes on this user.
9. **Send On Behalf:** Assign permissions to mailboxes on this user.
10. **Send As:** Assign permissions to mailboxes on this user.
11. **Mailbox Database:** You can select Mailbox database from the dropdown list.
12. **Mailbox Size (in MB):** You can either select Package /Addon defined or Custom. In case of "Custom" provide below storage limits:
 - i. **Issue warning at (MB):** Provide MB's to issue warning.
 - ii. **Prohibit send at (MB):** Provide MB's to prohibit send at.
 - iii. **Prohibit send and receive at (MB):** Provide MB's to prohibit send and receive at.
13. **Language:** Select locale of the mailbox.
14. **Time Zone:** Select Time zone.
15. **Alternate email:** Specify alternate email.
16. **Hide from Exchange Address List:** Click this check box if you wish to hide the email account from Global Access List (GAL).

Optional Fields: Optional fields may be left blank and filled later.

Distribution List membership: Select the distribution list for members.

Send setup Email: Check the option for Send Email if you want to send an Email.

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

Linked Mailbox

To add a linked mailbox navigate to the following path:



Click on the **Manage** and then select **MailBoxes** tab. Click on the **Add New Mailbox >> Linked 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.

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

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.

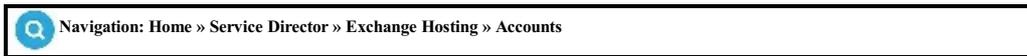
1. **Mail-enable active directory user:** Select the Existing user or create the new one.
2. **Mailbox database:** Select Mailbox Database from the drop down list
3. **Mailbox Size (in MB):** Provide mailbox size in MB.
4. **Full Name (Display name):** Provide the display name of the mailbox.
5. **Primary 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 the **Manage** and then select **Mailboxes** tab. Click **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. i.e. shared mailbox
5. **Full Access (Auto-Mapping Enabled):** Assign permissions to mailboxes on this user.
6. **Full Access (Auto-Mapping Disabled):** Assign permissions to mailboxes on this user.
7. **Send On Behalf:** Assign permissions to mailboxes on this user.
8. **Send As:** Assign permissions to mailboxes on this user.
9. **Mailbox Database:** You can select Mailbox database from the dropdown list.
10. **Mailbox Size (in MB):** You can either select Package /Addon defined or Custom. In case of "Custom" provide below storage limits:
 - i. **Issue warning at (MB):** Provide MB's to issue warning.
 - ii. **Prohibit send at (MB):** Provide MB's to prohibit send at.
 - iii. **Prohibit send and receive at (MB):** Provide MB's to prohibit send and receive at.
11. **Language:** Select locale of the mailbox.
12. **Time Zone:** Select Time zone.
13. **Alternate email:** Specify alternate email.
14. **Hide from Exchange Address List:** Click this check box if you wish to hide the email account from Global Access List (GAL).

Distribution List membership: Select the distribution list for members.

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

Group Actions Button (Mailbox)

To add a group actions for mailboxes navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on the **Manage** and then select **Mailboxes** tab. Click on the **Group Actions** button.

The Group Actions screen displays following:

1. **Mailboxes:** Select the mailboxes for which you want perform Group Actions.
2. **Operations:** You can perform the following Group Actions here.
 - i. Disable Archive
 - ii. Disable
 - iii. Enable Delete
 - iv. Enable Litigation Hold
 - v. Disable Litigation Hold
3. **General Settings:** The following are the general setting for the mailboxes.
4. **Hide from Exchange Address Lists:** Check this option to hide user from Exchange address list and then save it.
5. **Language:** Select the Locale of the mailbox user.
6. **Mailflow Settings:** Set the mail-flow settings for the selected mailboxes.
7. **Storage Quotas:** Define the storage quotas for the selected mailboxes.
8. **Mailbox Features:** Define the mailbox and the OWA features of the selected mailboxes.
9. **Distribution Members List:** Select the mailboxes for the distribution members list.
10. **Add Email Alias:** Provide the email alias for the selected mailboxes.
11. **Personal Archive Settings:** Provide the personal archive settings for the selected mailboxes.

Purchase More Resources

When adding a new user (Exchange, SharePoint, CRM, Skype4B) if you get a pop up:

Following resource(s) exceeds the maximum allowed limit. **Purchase More**

To define **Purchase More**, navigate to following path:

 Navigation: Home » System Configuration » Company Profile

Select **Personalization** tab. Provide "URL to purchase more resources when quota limit is reached".

URL to purchase more resources direct from the management interfaces where the existing resources reach their limit:

1. If the configurable field is left blank, Control Panel will redirect to the offline order form and if any associated Addon is available for sale, it will get selected to be sold.
2. The functionality will be available on both client and reseller side with extra permission for client to be able to purchase via offline order form. If external link is provided, it will be available without any permission from client side also.
3. Functionality is implemented in Exchange, SharePoint, CRM and Skype4B.

Providers can also direct change resources for existing subscriptions without purchasing more resources in order to avoid the hassle upgrade of service plan and selling of addons. This will not involve billing.

Edit Resources

Navigating to the following path and clicking on the subscription name you wish to check details of.

 Navigation: Home » Customer Manager » Subscription List

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

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

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

Select **Resources** tab and click **Edit Resources** and make the desired changes.

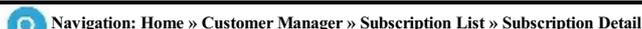
Increase the Addon Quantity

If you are using a basic plan with zero resources and use Addons to sell more users\resources as per requirement. You can increase the quantity of addon directly.

Navigating to the following path and clicking on the subscription name you wish to check details of.

 Navigation: Home » Customer Manager » Subscription List

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

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

Select the **Add-ons** tab. Click on the name of addon and **Edit Quantity**. You can either increase or decrease the number of addons.

To buy a new Add-on click **Buy Add-on**.

Mailbox Settings

To view and manage mailbox settings navigate to the following path:

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

General

To view and manage general settings of a Mailbox navigate to the following path:



Click on **Manage** and then select **Mailboxes** tab. Click on the mailbox name for which you wish to set its general settings as below:

General Settings:

1. **Mailbox template:** You can select mailbox template here. See Also: [Create Mailbox Template](#), [Assign Mailbox templates](#) and Custom Mailbox Template.
2. **User:** Provide or change user principal name.
3. **Domain User name:** It shows the domain user name.
4. **Display name:** It shows the user's display name.
5. **Mailbox type:** It shows the mailbox type for e.g. Room Mailbox
6. **Managed By:** Select the mailbox type.
7. **Hide from Exchange Address Lists:** Check or uncheck it.

Contact Information:

1. **Initials:** Provide initials if any.
2. **First Name:** Provide first name of the user.
3. **Last Name:** Provide last name of the user.
4. **Address:** Provide the address of the user.
5. **City:** Provide the name of the city.
6. **Zip/Postal Code:** Provide the zip/postal code.
7. **Business phone:** Provide phone number.
8. **Fax:** Provide fax number.
9. **Home phone:** Provide home phone number.
10. **Mobile phone:** Provide mobile phone number.
11. **Pager:** Provide 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 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 add a new email address to 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 add email address. Select **Email Address** tab, enter the name of new mail address in **Email Address** box and click on **Add** button.

Add Mailbox Database

To manage Mailbox Database 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 add database. Click on the **Mailbox Database** tab.

Select **Mailbox Database** from the drop down list and then click on **Save** button.

Set Email Forwarding

A mailbox can have multiple email addresses or aliases for a specific address type. This allows the mail box to receive messages that are addressed to any one of these e-mail addresses.

To set forwarding on a mailbox navigate to the following path:



Click on **Manage** and then select **Mailboxes** tab. Click on the mailbox name for which you wish set mail forwarding. Click on the **Mail Flow Settings** tab and enable the **Enable email forwarding** checkbox. Enter the address where mail shall forward in **Forward to** box and click **Save** button.

If you wish to keep a copy of email in the mailbox then enable the **Deliver message to forwarding address and mailbox** checkbox also.

You can also apply **limits**.

1. **Recipient limit:** Provide limit or check Unlimited.
2. **Max sending message size limit (MB):** Provide limit or check Unlimited.
3. **Max receiving size limit (MB):** Provide limit or check Unlimited.

You can also provide delete item retention in days.

The **Restrictions** displays following:

Accept Message From: There are two options to select from:

- i. **All senders:** If selected, message will be accepted from any sender.
- ii. **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:

- i. **No sender:** If selected, message will never be rejected.
- ii. **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 the **Advanced** tabs to set various OWA and POP/IMAP/SMTP options.

Note: When using Mailbox templates the **Advanced** tab will be hidden except for "Custom" Mailbox template.

Permissions

To change permissions on mailboxes navigate to the following path:



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.

Manage Wireless Service

To manage wireless account navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and select **Mailboxes** tab. You will be able to perform following operations when **Wireless Service** button is clicked. And select **Wireless Service** tab. To deactivate wireless account click on **Deactivate Wireless** button. You can manage following wireless device options and perform device activation:

You can also view wireless device and device activity.

Device Options

- i. Clear Statistics
- ii. Wipe device
- iii. Resend Service Book

Device Activation

- i. Specify an Activation Password
- ii. Generate an Activation Email
- iii. Clear Activation Password

Change Mailbox Password

To change a new mailbox password, 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 change the password. Select **General** tab and enter the new password in **New Password** box. Click **Set Password** button to set the new password.

Personal Archive Settings

To view and manage personal archive settings navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Accounts

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

1. **Enabled:** Check it if you want it to enable.
2. **Personal archive database:** Select personal archive database.
3. **Warning Quota (MB):** Provide warning quota in MB or check unlimited.
4. **Quota (MB):** Provide quota in MB or check unlimited.

Then click on **Save** button.

Unified Messaging

To enable unified messaging on mailboxes navigate to the following path:

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 **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 the **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.
 - i. Start time
 - ii. 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:
 - i. Send replies only to senders in my Contacts list
 - ii. 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:



Click on the **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 **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.

Allow Customers to Enable/Disable Mobile device management:

To allow/disallow Mobile device Policy Management for Customers/Resellers, you can check/uncheck "Mobile Device Policy Management allowed" under "Exchange Service Plans".

To create a hosted email plan navigate to following path:

Navigation: Home » Service Plans » Exchange

Under **Resources** tab and check option **Mobile device management allowed**.

Note: You can also edit existing hosted email plans by clicking on the **Edit**. and **Sync sold plan resources**.

If this **Sync sold plan resources** checkbox is checked, product name, comments, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox settings.

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.

Allow Customers to Enable/Disable In-Place Hold:

In-Place Hold is an enterprise feature. You can allow/disallow Customers to Enable/Disable In-Place Hold on mailboxes. Check/uncheck **In-Place hold allowed** option under "Exchange Service Plans".

To create a hosted email plan navigate to following path:

 Navigation: Home » Service Plans » Exchange

Under **Resources** tab and check option **In-Place Hold allowed**.

Note: You can also edit existing hosted email plans by clicking on the **Edit** and **Sync sold plan resources**. If this **Sync sold plan resources** checkbox is checked, product name, comments, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox settings.

Viewing Mail Contacts

Mail contacts are listed in exchange Global Address List (GAL) and visible in OWA. Click on the mail contact name to manage advanced properties. When a mail contact is disabled it no longer shows in GAL.

To view mail contacts navigate to the following path:



Click on **Manage** and then select **Mail Contacts** tab. 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. **Internal Email:** For each external email address there is an SMTP email created in exchange. Enter the SMTP email address name you would like to create for this mail contact.
4. **SIP Address:** Provide SIP address of contact.
5. **Phone Number:** Provide phone number of contact.
6. **Hide from Exchange Address List:** Click this checkbox if you wish to hide the email account from Global Access List (GAL).
7. **Optional Fields:** Optional fields may be left blank and filled later.

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

Add Bulk Contact

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

- 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 the **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:

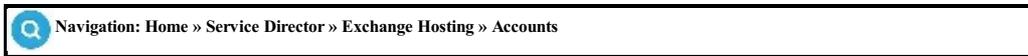
 Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on the **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 mail boxes for easy mail distribution. For example, you may create a 'sales' distribution list, add mail boxes 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** and then select **Distribution List** tab. You can add Distribution List, bulk distribution lists, export dynamic distribution list and manage group actions for DL's.

You can [Add Distribution List](#), **Add Bulk Distribution Lists**, **Export Dynamic Distribution List**, **Export to Excel** all DL's, perform **Group Actions** and get **Members Report** to excel sheet.

The list of distribution lists displays following:

1. **Display Name:** The name of distribution list as it appears in mail from address.
2. **Email:** The email address for the distribution list. Any email message sent to this email is distributed among the list members.
3. **List Members:** Shows current number of list members.
4. **Delete:** Click to delete the distribution list.

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](#)

Add Distribution List

A distribution list is a group of mail recipients that is addressed as a single recipient. Distribution lists are used to send e-mail to groups of people without having to enter each recipient's individual address. To add a distribution list navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **Distribution List** tab.

1. **Type:** Select type of the distribution List.
2. **Display Name:** Enter the distribution list name in **Display Name** Box.
3. **Primary Email:** Enter primary email address.
4. **Require that all senders are authenticated:** Checkbox to select.
5. **Managed By:** Select manager.
6. **Group Member:** Select DL members.

and click **Save** button.

Add Bulk Distribution Lists

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

1. **Primary Email:** Enter primary email address.
2. **Require that all senders are authenticated:** Checkbox to select.
3. **csv file to import:** Browse to select a csv file.

Click on **Add Bulk Distribution List** button when done.

Export Dynamic Distribution list

You can export Dynamic Distribution list.

Group Actions

Click on **Group Actions** and select distribution list(s) for group operations/jobs. Following are the group operations that can be performed via control panel.

1. General Settings
2. Restrictions
3. Managed By
4. Add List Members
5. Remove List Members
6. Grant Permissions
7. Remove Permissions
8. Message Approval

Click **Save** when done.

Add Member to Distribution List

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

To add a distribution list member navigate to the following path:



Click on the **Manage** and then select **Distribution List** tab. Select the distribution list for which you wish to add a new member. Click on the **List Member** 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.

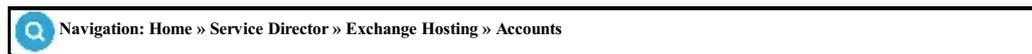
To add a new email address to a distribution list navigate to the following path:

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

Click on the **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:

 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 and select **Advanced** tab.

The advanced interface displays following:

General Settings

1. **Display Name:** Type the name of Distribution list.
2. **Managed By:** Select manager of DL.

Restriction

Accept Message From: There are two options to select from:

1. **All senders:** If selected, message will be accepted from any sender.
2. **Only senders in the following list:** If you selected, the message will be accepted only from the addresses selected from the list.

Reject Message From: There are two options to select from:

1. **No senders:** If selected, message will never be rejected.
2. **senders in the following list:** If you selected, the message will be rejected if coming from the addresses selected from the list.

Delivery Reports

1. Send delivery reports to group manager
2. Send delivery reports to message originator
3. Do not send delivery reports

Limits

- **Maximum receiving message size (MB):** Select unlimited or provide value in MB.

Other

1. **Hide from Exchange Address Lists:** Checkbox.
2. **Send out-of-office message to originator:** Checkbox.

Membership Approval

Use this section to specify whether approval is required for users to join or leave the group.

1. **Member Join Restriction:** Choose whether owner approval is required to join the group. Select one of the following settings:
 - i. **Open:** Anyone can join this group without being approved by the group owners
 - ii. **Closed:** Members can be added only by the group owners. All requests to join will be rejected automatically
 - iii. **Owner Approval:** All requests are approved or rejected by the group owners. If you select this option, the group owner or owners receive an email requesting approval to join the group.
2. **Member Leave Restriction:** Choose whether the group is open to leave. Select one of the following settings:
 - i. **Open:** Anyone can leave this group without being approved by the group owners.
 - ii. **Closed:** Members can be removed only by the group owners. All requests to leave will be rejected automatically

Send As

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

To grant send as to a distribution list member navigate to the following path:

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

Click on **Manage** and then select **Distribution List** tab. Select the distribution list for which you wish to add a new member. Click on **Send As** tab and select the list member from **Mailbox** drop-down list. Click the **Grant Send As** button.

Send On Behalf

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

To grant Send On Behalf to a distribution list member navigate to the following path:

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

Click on **Manage** and then select **Distribution List** tab. Select the distribution list for which you wish to add a new member. Click on **Send On Behalf** tab and select the list member from **Mailbox** drop-down list. Click the **Save** button.

Message Approval

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** from options in front of Exchange account and select **Public Folders** tab. To create a new Public Folder click on **Add Public Folder** button.

Migrate Public Folders

When Migration is enable on General Settings, you will see **Import** button. To migrate Public Folders from Exchange server click **Enable Migration**.

Manage Public Folders

It shows the following listings:

1. **Public Folder name:** It shows the public folder name. Click on folder name to manage public folders.
2. **Mail enable Folder:** It shows Yes or No.
3. **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. **Email address:** You can also add email addresses to it.
3. **Mail flow Settings:** You can manage Email forwarding settings to mailboxes.
4. **Permissions:** You can also adjust permissions such as **Send on Behalf** and **Send As**.

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

Add Public Folders

To Add Public Folders navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **Public Folders** tab. Click on **Add Public Folder** button. Fill in the following fields:

1. **Public folder root:** Select the root for the public folder you want to create.
2. **Folder name:** Give the name of the public folder.
3. **Mail Enable Folder:** Check or uncheck if you want a Mail Enable.
 - i. **Email Address:** Provide email address.
 - ii. **Allow posting to external users:** Checkbox
 - iii. **Allow posting to internal users:** Checkbox.

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

General (PF)

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



Click **Manage** from options in front of Exchange account and select **Public Folders** tab. Click on a existing Public Folder name or create new. Under **General** tab you will see following options

Public Folders

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

Public Folder Posting

1. **MailBox:** It shows the member mailboxes.
2. **Permission Level:** It shows the permission level.
3. **Options:** Following are available under options:
 - i. Edit
 - ii. Allow/Disallow
 - iii. Apply changes to this public folder an its sub-folder.

Add Permissions to Public Folders

To add permission to public folders navigate to the following path:



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

- i. **Member:** Select member of Public Folder posting.
- ii. **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.

Mail Flow Settings (PF)

To add and manage email addresses to 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. 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:

- i. **All senders:** If selected, message will be accepted from any sender.
- ii. **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:

- i. **No senders:** If selected, message will never be rejected.
- ii. **senders in the following list:** If you selected, the message will be rejected if coming from the addresses selected from the list.

Click on **Save** button when done.

Send Permissions (PF)

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



Click **Manage** from options in front of Exchange account and select **Public Folders** tab. Click on a existing Public Folder name or create new. Click on the **Permissions** tab.

1. **Send On Behalf:** Select mailboxes/contacts/groups to Send on behalf and Save.
2. **Send As:** Select mailboxes/contacts/groups to Send As and Save.

Viewing Rules

Under **Rules** tab, you can manage disclaimers, signatures and transport rules. **Disclaimers** are custom messages (like legal notices) automatically added to emails. **Signatures** are personalized text, often including contact details, appended to emails. **Transport rules** are conditions-based actions that manage mail flow, such as redirecting, rejecting, or modifying messages. These rules help enforce policies, add disclaimers, or ensure compliance with regulations.

To view rules, navigate to the following path:

Navigation: Home » Service Director » Exchange Hosting » Accounts

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

You can view and perform following operations:

1. **Disclaimer:** You can manage disclaimers.
2. **Signatures:** You can manage signatures.
3. **Transport Rules:** You can manage transport rules

Add Disclaimer

To add disclaimer navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Accounts

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.

Group Actions

To view Group Actions navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Group Actions

Click **Group Actions** tab. To search for the Group actions

1. **Customer ID:** It is the customer id.
2. **Customer Name:** It is the customer name.
3. **Owner:** It is the owner of the exchange.
4. **Organization:** It is the name of the organization.
5. **Command:** It is the command on which group action is to be performed.
6. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.

It displays the following listings:

1. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.
2. **Command:** It is the command on which group action is to be performed.
3. **Date:** It displays the date.
4. **Entered Tries:** It shows the number of entered tries.
5. **Last Tried:** It displays the last try.
6. **Customer ID:** It is the customer ID.
7. **Customer Name:** It is the customer name.
8. **Owner:** It is the owner of the exchange.
9. **Added by:** It displays the name of the employee .

Viewing Retention Settings

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

 Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then 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.

Allow Customers to Enable/Disable Retention Settings:

To allow/disallow "Manage Retention Policies" on Customers, check/uncheck this option under "Exchange Service Plans".

To create a hosted email plan navigate to following path:

 Navigation: Home » Service Plans » Exchange

Under **Resources** tab and check the option **Customer can manage Retention policy:**

Note: You can also edit existing hosted email plans by clicking on the **Edit.** and **Sync sold plan resources.**

If this **Sync sold plan resources** checkbox is checked, product name, comments, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox settings.

Adding Retention Policies

To add retention policies navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **Compliance Management** tab. Click on the **Retention Policies** button to add policy.

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 on **Manage** and then select **Compliance Management** 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.

Journaling

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



Click on **Manage** and then select **Compliance Management** tab. Now select **Journal Rules** tab.

Click on **Enable/Update Journaling** button. Journaling is available for Enterprise and Enterprise Plus mailbox.

1. **Mailboxes:** Select mailboxes from Selectable
2. **Scope:**Select scope for journaling for e.g. Global, Internal, or External.
3. **Recipient:** Select recipient user from the drop down list.

Click **Save** when done.

Allow Customers to Enable/Disable journaling:

Journaling is an enterprise feature. You can allow/disallow Customers to Enable/Disable In-Place Hold on mailboxes. Check/uncheck **Journaling allowed** option under "Exchange Service Plans".

To create a hosted email plan navigate to following path:



Under **Resources** tab and check option **Journaling allowed**.

Note: You can also edit existing hosted email plans by clicking on the **Edit**. and **Sync sold plan resources**. If this **Sync sold plan resources** checkbox is checked, product name, comments, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox settings.

Managing Spam Filters

To manage spam filter, navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Accounts

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

Enable SPAM filter for: example.com

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

Click **Save** when done.

Managing Mobile Devices

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

 Navigation: Home » Service Director » Exchange Hosting » Accounts

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.

 Navigation: Home » Service Director » Exchange Hosting » Accounts

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:

 Navigation: Home » Service Director » Exchange Hosting » Accounts

Click on **Manage** and then select **Calendar Permissions** tab. Select permission level for default SG and provide custom permissions.

1. **Anonymous:** Select permission level for e.g. None, 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.

Hosted Email Plan Management

Hosted email plans are created through powerful Service Plan Wizard. It includes following:

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

To create a hosted email plan, navigate to following path:



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

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

1. **Product Type:** Select **Exchange Hosting** from the drop-down list.
2. **Product Name:** Enter the name of your product.
3. **Provider:** Select your desired Exchange provider from the drop down list.
4. **Is Active:** Select No if you want to disable this product selling.
5. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
6. **Associate Addon:** You may want to associate addon with this product. Select Yes or No.
7. **Associate Domain:** Select how you want to associate domains with this product.
8. **Edu-Discount Package:** Check this option to enable.
9. **Date:** This is date set by the system (not editable).
10. **Sync sold plan resources:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings.
11. **Product Comments:** Enter any comments you to associate with this product. These comments show up on the store-front when this product is selected.

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

Resources: On step-2 you will set the exchange resources for the plan.

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

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

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

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

- a. Setup Price
- b. Price
- c. Discount

Enter prices in each box.

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

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

Note: Repository and billing service is provided, no management is involved in this case of addon. If you require that the addon is provisioned through Control Panel Provisioning System, please refer to: Creating Addon

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

Viewing Mailbox Templates

A mailbox template is used to define a certain set of storage limits or SPLA type for mailbox, Storage for folders, OWA settings and restrictions etc.

To view mailbox templates navigate to the following path:

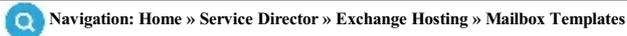
 Navigation: Home » Service Director » Exchange Hosting » Mailbox Templates

It displays the following listings:

1. **Template Name:** It shows the name of the template.
2. **Owner:** It shows owner name:
3. **Prohibit Send & Receive At (MB):** It displays the prohibit send & receive at in MB.
4. **Outlook License Enabled:** It shows the outlook license enabled or not.
5. **OWA ActiveSync Enabled:** It shows OWA Active Sync Enabled or not.
6. **Exchange ActiveSync access allowed:** It shows the Exchange Active sync access allowed or not.
7. **Options:** The option will allow you to do the following:
 - a. **Clone:** You can clone a template.
 - b. **Edit:** You can edit an existing template.
 - c. **Remove:** You can remove/delete a template.

Create Mailbox Templates

To add new mailbox templates, navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Mailbox Templates

Add Template

Click on **Add** button to add a new mailbox template to the listing.

1. **Owner:** Select owner from the drop down list.
2. **Template Name:** Provide the name of the template.
3. **Distribution List Membership:** Provide distribution list membership.
4. **Microsoft SPLA Type:** Select the type of SPLA from the drop down list.

Storage Quotas: Provide and define storage under storage quotas section.

1. **Issue warning at (MB):** Provide issue warning at storage value in MB.
2. **Prohibit send at (MB):** Provide prohibit send at storage value in MB.
3. **Prohibit send and receive at (MB):** Provide prohibit send and receive at storage value in MB.
4. **Max Sending Message Size Limit (MB):** Provide maximum sending message size limit in MB.
5. **Max Receiving Size Limit (MB):** Provide maximum receiving size limit in MB.
6. **Recipient limit:** Provide recipient limit.
7. **Keep Deleted Items For Days:** Provide retention limit. Leave blank for default.

Mailbox Features: Select mailbox features.

1. POP3 access allowed
2. IMAP access allowed
3. MAPI access allowed
4. OWA/HTTP access allowed
5. OWA all address lists enabled
6. OWA calendar enabled
7. OWA contacts enabled
8. OWA change password enabled
9. OWA journal enabled
10. OWA tasks enabled
11. OWA sticky notes enabled
12. OWA premium client enabled
13. OWA reminder and notifications enabled
14. OWA spell checker enabled
15. OWA search folders enabled
16. OWA signatures enabled
17. OWA junk mail enabled
18. OWA theme selection enabled
19. OWA UM integration enabled
20. OWA ActiveSync integration enabled
21. Outlook Non-Cached mode allowed
22. Exchange ActiveSync access allowed
23. OWA PublicFolder enabled
24. Outlook License Enabled

Custom Attributes: You can also select custom attributes in templates.

Assign Mailbox Templates

After creating the Mailbox Templates next is to assign mailbox templates to subscriptions. There are different ways to assign Mailbox templates to subscriptions.

Define Default Mailbox Template

To define company default mailbox template navigate to following path:

Navigation: Home » System Configuration » Company Profile

Select **Company's default mailbox template** from the dropdown list at the end of Company Profiles page.

Assign Mailbox Template using Service plans

To assign Mailbox Template using Service plans, navigate to the following path:

Navigation: Home » Service Plan » Exchange

Click **Edit** in front of Exchange Service plan under **Customer Product Listings** tab. Select **Resources** tab and then select Mailbox templates.

Click **Finish** when done.

Assign Mailbox Templates using Add-ons

To assign Mailbox Templates using Add-ons, navigate to the following path:

Navigation: Home » Service Plan » Exchange

Select **Add-on Management** tab and create new User mailbox add-on and assign mailbox template. Associate this Add-on to service plan and then sell it to customer.

Mailbox Manager

To view mailbox manager navigate to the following path:

 Navigation: Home » Service Director » Exchange Hosting » Mailbox Manager

You can provide any of the following to search and filter your required mailbox(es) and click **Search** button:

1. Select Company Name [Owner]
2. Organization Name
3. Mail Domain
4. Customer ID
5. Customer Name
6. Company name
7. Display name
8. UPN
9. SAM Account Name
10. Address
11. City
12. State
13. Zip
14. Phone
15. Job title
16. Company
17. Department
18. Office
19. Mailbox Template
20. Select Country
21. Select Status
22. Select Type
23. Select Litigation hold
24. Select hidden from Address List

To add a new mailbox Click **Add Mailbox** button

1. **Mailbox type:** Select the type of mailbox such as User, Linked, Shared, Room and Equipment.
2. **Exchange Organizations:** Select Organization from the dropdown list.

Click **OK**.

It will go to following page:

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

You can view more details on adding a mailbox: [Add Mailbox](#)

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. **Customer:** Provide customer name
2. **Organization:** Provide Organization name.
3. **Mailbox:** Provide mailbox.
4. Select **Status** for e.g. Pending, In Process, Completed with warning etc.

Click **Search** button.

Orchestration Module for SharePoint

Control Panel allows Microsoft SharePoint Service through its Orchestration Module for SharePoint. Automation Module for SharePoint is designed for all sizes of service providers wanting to start or grow their Hosted SharePoint business while minimizing ongoing support costs.

Orchestration Module for SharePoint fully automates and controls service delivery on Microsoft SharePoint 2019 and its legacy versions, manages billing and provides self service control panel. Control Panel supports following version of Microsoft SharePoint.

1. WSS3.0/MOSS 2007
2. Microsoft SharePoint 2010
3. Microsoft SharePoint 2010 Multi-tenant
4. Microsoft SharePoint 2013
5. Microsoft SharePoint 2013 Multi-tenant
6. Microsoft SharePoint 2016
7. Microsoft SharePoint 2016 Multi-tenant
8. Microsoft SharePoint 2019

Note: Please make sure you have subscribed to SharePoint service 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 Accounts

To view SharePoint accounts navigate to the following path:

 Navigation: Home » Service Director » SharePoint Hosting » Accounts

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

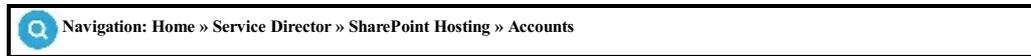
The list displays the following:

1. **Subscription ID:** This is unique ID assigned to the subscriptions.
2. **Portal Name:** The name of Portal that this SharePoint server has. This will be part of the URL.
3. **Portal Title:** Specific title that is assigned to the site.
4. **URL:** Web address of newly created site.
5. **Users:** Number of subscribed users against the site.
6. **Options:** Click on **Manage** 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** 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 info and the service summary.
2. **SharePoint Portal:** Click on **Connect to SharePoint Portal** link to [view SharePoint Portal](#). You can also **Edit** SharePoint portal.
3. **Domains:** You can [add new SharePoint domains](#).
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](#) on SharePoint account.
7. **Group Actions:** You can view all the group actions performed on users and groups.

Add New Domain

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

 Navigation: Home » Service Director » SharePoint Hosting » Accounts

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.

Viewing SharePoint Portals

To view & edit SharePoint Portals navigate to the following path:



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

1. **Domain Name:** It shows the SharePoint domain name for e.g. domainname.com.
2. **Portal Title:** It shows the title of the SharePoint portal.
3. **Description:** It shows the description if any.
4. **URL:** It shows the URL of the SharePoint portal for e.g. http://pss.sp-pss-10.
5. **Manager:** It shows the manager of the portal.
6. **Manager Email:** It shows the email address.
7. **Maximum Storage level for each site collection (MB):** It shows maximum storage level for each site.
8. **Send warning e-mail when storage for each portal reaches (MB):** It shows Send warning e-mail when storage for each portal reaches.
9. **Limit maximum usage per day to (points):** It shows Limit maximum usage per day
10. **Send warning email when usage per day reaches (points):** It shows send warning email when usage per day reaches.
11. **Language:** It shows the Locale for e.g. English.
12. **SharePoint:** Click on the **Connect to SharePoint Portal** to connect.

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

Add new Organizations/Portals

To create a new Organization / Portal for your SharePoint account navigate to the following path:



Click on SharePoint Subscription. Select **Organizations/Portals** tab:

The list of SharePoint portals displays following:

1. **Portal:** This is the URL of the SharePoint portal. <http://portal.machsol.com>
2. **Title:** This is the SharePoint portal title.
3. **Users:** Total no. of users on the SharePoint portal.
4. **Manage:** Click on **Manage** to manage SharePoint service.
5. **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](#).

Add Permission Levels

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

 Navigation: Home » Service Director » SharePoint Hosting » Accounts

Click on **Manage** and then select **Permissions Level** tab. It displays the following listing:

1. **Name:** It displays the name of the Permission level.
2. **Description:** It displays description of the permission level.
3. **Base Permissions:** It displays the base permissions.
4. **Options:** You can edit the group and delete the group from the options column.

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

1. **Name:** Provide the name of the Permission level.
2. **Description:** Provide the description of the permission level.
3. **Base Permissions:** Select the base permissions.

Click on **Save** when done.

Add Group in SharePoint

To view/add SharePoint groups, navigate to the following path:



Click **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.

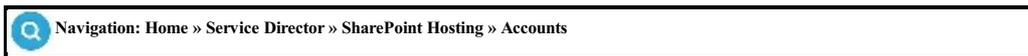
Click on the **Add Group** button to add a new group.

1. **Group name:** Provide the name of the Group.
2. **Description:** Provide the description fro the group.
3. **Group Owner:** Select he Group owner from the drop down list.
4. **Permission Levels:** Select permission level for the group i.e. Full, Design, Edit, Contribute or Read.
5. **Group Members:** Check the members of the group.

Click on **Save** when done.

Add SharePoint User

To add a new SharePoint user for a SharePoint collection navigate to the following path:



Click on **Manage** in front of SharePoint account and select **Users** tab. Click on **Add User** button.

The add user screen displays following:

1. **User:** Create new account @ipcheck.com
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 on the **Save** button when done.

View and Edit SharePoint Users

To view & edit SharePoint users navigate to the following path:



Click on **Manage** and select **Users** tab. It displays the following listings:

1. **Display Name:** It shows the display name. i.e. Friendly name.
2. **User name/Principle Name:** It displays the user name.
3. **Role:** It displays the user's role.
4. **Date Created:** It shows the date on which the user is created.
5. **Options:** To remove a SharePoint user click on **Remove**. To edit click on **Edit** it shows the two buttons.

The **General** button displays the following:

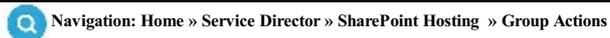
1. **User:** Provide user name @ipcheck.com.
2. **Display Name:** Enter a friendly name.
3. **User Role:** Select user role as Owner, Visitor or Member
4. **Notes:** Enter notes. Then click on **Save** button.

The **Set Password** button displays the following:

1. **Password:** Enter password.
2. **Confirm password:** Re-type Password.
3. **Send Email:** Tick means Yes.
4. **Send email to:** Enter receiver's email address. Then click on **Set Password** button.

Group Actions for SharePoint

To view Group Actions, navigate to the following path:

 Navigation: Home » Service Director » SharePoint Hosting » Group Actions

To search for the Group actions

1. **Customer ID:** It is the customer id.
2. **Customer Name:** It is the customer name.
3. **Owner:** It is the owner of the SharePoint.
4. **Organization:** It is the name of the organization.
5. **Command:** It is the command on which group action is to be performed.
6. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.

Click **Reset Tries Count** to automate provisioning process once the tries count reached '10'. You can also **Clear Completed/Cancelled Jobs**. It displays the following listings:

It displays the following listings:

1. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.
2. **Command:** It is the command on which group action is to be performed.
3. **Date:** It displays the date.
4. **Entered Tries:** It shows the number of entered tries.
5. **Last Tried:** It displays the last try.
6. **Customer ID:** It is the customer id.
7. **Customer Name:** It is the customer name.
8. **Owner:** It is the owner of the exchange.
9. **Added by:** It displays the name of the employee .

Hosted SharePoint Plan Management

Hosted SharePoint plans are created through powerful Service Plan Wizard. It includes following:

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

To create a hosted email plan navigate to following path:



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

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

1. **Product Type:** Select **Microsoft SharePoint** from the drop-down list.
2. **Product Name:** Enter the name of your product.
3. **Provider:** Select your desired SharePoint provider from the drop down list..
4. **Server Group:** Select the server group where this service plan's user accounts will be setup.
5. **Is Active:** Select No if you want to disable this product selling.
6. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
7. **Associate Addon:** You may want to associate addon with this product. Select Yes or No.
8. **Associate Domain:** Select how you want to associate domains with this product.
9. **Sync sold plan resources:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings.
10. **Product Comments:** Enter any comments you to associate with this product. These comments show up on the store-front when this product is selected.

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

Resources: On step-2 you will set the SharePoint resources for the plan.

1. **Create portal as:** Select Sub-domain Sub-Domain -OR- Vanity URL Vanity Url
2. **Maximum Hosted Organizations / Site Collections:** Enter number of maximum hosted organizations/site collections.
3. **Maximum Users per Organization / Site Collection:** Enter maximum number of users.
4. **Maximum Storage level for each site collection (MB):** Enter maximum number of storage level for each site collection.
5. **Send warning e-mail when storage for each portal reaches (MB):** Enter storage for sending warning email.

Click **Next** button.

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

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

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

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

- a. Setup Price
- b. Price
- c. Discount

Enter prices in each box.

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

your involvement.

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

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

Portal Usage Reports

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

 Navigation: Home » Service Director » SharePoint Accounts » 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 Microsoft 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:

 Navigation: Home » Service Director » CRM Hosting » Accounts

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

The list displays the following:

1. **Subsc. ID:** This is unique ID assigned to the subscriptions.
2. **Organization:** It displays following:
 - i. **Name:** Title or name that is displayed.
 - ii. **Package:** It displays the CRM package in use.
 - iii. **URL:** Address of newly created site.
3. **Users:** Number of subscribed users against the site.
4. **Options:** Click on **Manage** to [manage CRM service](#).

Hosted CRM Service Management

Orchestration Module for Microsoft CRM activates rich web based interface for the management of hosted CRM service. Using the web interface the provider and the end-user may perform routine management task without the need of going at the CRM server or active directory.

Navigate to the following path:



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

1. **General Settings:** Click on **Put on hold** button to put it on hold. You can view general and service summary for CRM account. You can also synchronize business units.
2. **CRM Organizations:** Click on **Connect to CRM organizations** link to [view CRM organization](#).
3. **Domains:** You can view and [add new domains](#) to CRM account.
4. **Business Unit:** You can also create [business units](#).
5. **Users:** You can [add new users](#) to CRM account.
6. **Group Actions:** You can view [group actions](#) performed on CRM account.

Viewing CRM Organization

To view CRM Organization navigate to the following path:

 Navigation: Home » Service Director » CRM Hosting » Accounts

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. **Connect to CRM Organization:** 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:



Click on **Manage**. 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** 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:

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

Click on **Manage** and then select **Business Units** tab. It displays the following listing:

1. **Business Unit:** Enter Business Unit name.
2. **Parent Business Unit:** Select parent business unit name.

To add a new business unit click on **Add Business Unit** button.

Viewing CRM Users

To view users for a CRM organization navigate to the following path:



Click on **Manage** and then select **Users** tab. You can filter and search user as per your criteria.

You can add new user by clicking on **Add User** or you can **Add Bulk Users**. You can also perform **Group Actions** for CRM Users.

It will display following in the listing:

1. **User:** It shows the user display name along with email address.
2. **Details:** It shows following options:
 - i. **Status:** It shows the status of the user.
 - ii. **User Role:** It shows the user role assigned.
 - iii. **Date Created:** It shows the date when it is created.
 - iv. **Business Unit:** It shows the business unit
3. **Options:** You have options to **Edit, Enable/Disable, Delete** and **Remove and Delete AD User** .

Add CRM User

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



Click on **Manage** and then select **Users** tab. Click on the **Add User** button.

Note: Existing user can be modified or disabled by clicking on **Edit** and **Disable** respectively.

The add user screen displays following:

1. **User:** You may create a new user or select an existing (that is used by other services e.g. Exchange, SharePoint but not CRM) active directory user account.
2. **Display Name:** Provide display name.
3. **First Name:** Provide first name.
4. **Last Name:** Provide last name.
5. **Access Mode:** Select Access mode of user.
6. **CAL Type:** Select CAL type.
7. **Business Unit:** Select business unit
8. **User Role:** Select the user role you wish to assign to the new user.
9. **Email:** This is the email address where CRM account email is sent.
10. **Password:** Provide password.
11. **Notes:** Provide notes.
12. **Send Email:** Check this to send and email notification and provide email address.

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

Group Actions for CRM

To view Group Actions, navigate to the following path:

 Navigation: Home » Service Director » CRM Accounts » Group Actions

To search for the Group actions

1. **Customer ID:** It is the customer id.
2. **Customer Name:** It is the customer name.
3. **Owner:** It is the owner of the CRM.
4. **Organization:** It is the name of the organization.
5. **Command:** It is the command on which group action is to be performed.
6. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.

Click **Reset Tries Count** to automate provisioning process once the tries count reached '10'. You can also **Clear Completed/Cancelled Jobs**. It displays the following listings:

1. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.
2. **Command:** It is the command on which group action is to be performed.
3. **Date:** It displays the date.
4. **Entered Tries:** It shows the number of entered tries.
5. **Last Tried:** It displays the last try.
6. **Customer ID:** It is the customer id.
7. **Customer Name:** It is the customer name.
8. **Owner:** It is the owner of the exchange.
9. **Added by:** It displays the name of the employee .
10. **Option:** You can manually click on RUN for failed items.

Hosted CRM Plan Management

Hosted CRM plans are created through powerful Service Plan Wizard. It includes following:

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

To create a hosted CRM plan, navigate to following path:



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

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

1. **Product Type:** Select **CRM Hosting Product** from the drop-down list.
2. **Product Name:** Enter the name of your product.
3. **Provider:** Select desired CRM 4Server from the drop down list.
4. **Server Group:** Select the server group where this service plan's user accounts will be setup.
5. **Is Active:** Select No if you want to disable this product selling.
6. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
7. **Associate Addon:** You may want to associate addon with this product. Your choices are:
 - a. Optional
 - b. Required
 - c. Suppressed
8. **Associate Domain:** Select how you want to associate domains with this product. Your choices are:
 - o Required
9. **Sync sold plan resources:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings.
10. **Product Comments:** Enter any comments you to associate with this product. These comments show up on the store-front when this product is selected.

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

Resources: On step-2 you will set the CRM resources for the plan.

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

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

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

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

- a. Setup Price
- b. Price
- c. Discount

Enter prices in each box.

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

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

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

CRM Usage Reports

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

 Navigation: 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. **Customer:** It displays the customer name.
2. **Organization Name:** It displays the name of the CRM organization. To manage service click on the organization name.
3. **Domain Names:** It shows the display name of the customer.
4. **Organization URL:** It shows the organization URL.
5. **Enabled Users:** It shows the no of enabled users.
6. **Disabled Users:** It shows the no of disabled users.
7. **Total Users:** It shows the total no of users.
8. **Domains:** It displays the no of domains.

Orchestration Module for Microsoft Skype for Business

Control Panel allows Hosted Skype for Business Service through its Orchestration Module for Microsoft Skype for Business. Control Panel Orchestration Module for Skype for Business is designed for all sizes of service providers wanting to start or grow their Hosted Skype4B business while minimizing ongoing support costs.

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

1. Microsoft Lync server 2010
2. Microsoft Lync 2010 Hosting Pack
3. Microsoft Lync 2013
4. Microsoft Lync 2013 Hosting Pack
5. Skype for Business 2015
6. Skype for Business 2019

Note: Please make sure you have subscribed to Orchestration Module for Microsoft Skype for Business to avail this service otherwise you won't be able to utilize this feature. If you have any questions or want to avail this feature, please contact your service provider.

Viewing Skype4B Accounts

To view Skype4B accounts navigate to the following path:

 Navigation: Home » Service Director » Skype4B Hosting » Accounts

You can search your Skype4B(Lync) account by its account status such as **All**, **Active**, **Suspended** and **Graced**.

It displays the following listing:

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

Hosted Skype4B Service Management

Orchestration module for Skype4B 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 and manage Skype4B accounts navigate to the following path:

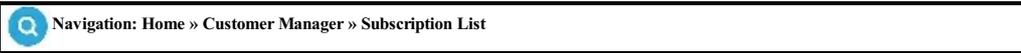


Click on **Manage**. Here you can see the following tabs:

1. **General Settings:** You can view the general and the service summary.
2. **Domains:** You can [add new domains](#) to your Skype4B account.
3. **Users:** You can [add new users](#) and [add bulk users](#) to your Skype4B account.
4. **Federation Settings:** You can also define [federation settings](#).
5. **Phone numbers:** you can view [Phone numbers](#) for Skype4B account.
6. **Persistent Chat Service:** You can [add category](#) and [add chat rooms](#) to your Skype4B account.
7. **Response Groups:** You can [add Groups](#), [Queues](#) and [Workflows](#) under response groups tab.
8. **Group Actions:** You can view Group Actions that are performed.
9. **Contacts:** You can view and create [contacts](#).
10. **Meeting rooms:** You can enable [meeting rooms](#).

Skype4B Organization

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

 Navigation: Home » Customer Manager » Subscription List

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

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

Select **Skype4B Organization** tab. You will be able to view the following listing:

1. **Status:** It shows the status of the subscription.
2. **Organization Name:** It displays the organization name.
3. **Users:** It displays the no. of users.
4. **Options:** Click on **Manage** to [manage services of the Skype4B account](#).

Adding Domains to Skype4B

To view and manage Skype4B accounts navigate to the following path:

 Navigation: Home » Service Director » Skype4B Hosting » Accounts

Click on **Manage** and select **Domains** tab.

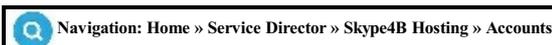
It displays the following listing:

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.

Adding Users to Skype4B

To view and manage Skype4B accounts navigate to the following path:

 Navigation: Home » Service Director » Skype4B Hosting » Accounts

Click on **Manage** and select **Users** tab. Click on **Add New User** button.

Fill in the following field in *Add User* section

1. **Package:** Select package.
2. **Skype4B enabled Active Directory users:** Select users 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:** Provider pager address.
15. **Web Page:** Provide web page URL.
16. **Description:** Provide description of the user.

Fill in the following fields under **Organization** section.

1. **Job title:** Provide job title.
2. **Company:** Provide company name.
3. **Department:** Provide department name
4. **Office:** Provide office name.

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.

Adding Bulk User to Skype4B

To add bulk user to Skype4B accounts navigate to the following path:



Click on **Manage** and select **Users** tab. Click on **Add Bulk User** button.

1. **Package:** Select package from the drop down list for which you want to import bulk user.
2. **Select User:** you can select one of the following options:
 - 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.

Federation Settings

To view and manage federation settings navigate to the following path:

 Navigation: Home » Service Director » Skype4B Hosting » Accounts

Click on **Manage**. 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.

Phone Numbers

To view phone numbers navigate to the following path:

 Navigation: Home » Service Director » Skype4B Hosting » Accounts

Click on **Manage**. Select **Phone Numbers** tab. It displays the following listing:

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

Viewing Groups

Agent groups contain a specified set of user accounts, that belong to a "Response group", how calls are Routed in the group, and what options a member has, are configured at the agent group level. To view Groups, navigate to the following path:



Click on **Manage**. Under **Response Group** tab, click on **Groups** tab you will see the following:

To [add a new Group](#) click on **Add New Group** button

1. **Group name:**It displays the name of the group.
2. **Participation Policy:** It displays the participation policy such as formal or informal etc.
3. **Routing Method:**It displays the routing method such as longest Idle etc.
4. **Description:**It shows the description of the group.
5. **Options:** You can Edit or Remove the group from the listing by clicking on the respective link.

Adding a Group

To add a new Groups, navigate to the following path:

 Navigation: Home » Service Director » Skype4B Hosting » Accounts

Click on **Manage**. Under **Response Group** tab, click on **Groupstab** you will see the following:

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

1. **Group name:** Provide a friendly name for a group.
2. **Description:** Provide a detailed description of the group.
3. **Participation Policy:** Select the participation policy from dropdown list as formal or informal.
4. **Alert Time (in seconds):** You must enter a numeric value between 10 to 600 for alerts.
5. **Routing Method:** Select routing method from the drop down list.
6. **Agents:** Select to define a new group or select an existing distribution group
7. **Agents:** Select existing groups as agents

Click on **Save** when done.

Viewing Queues

A queue is an object that holds Callers as they dial in to the "response group". To view queues navigate to the following path:



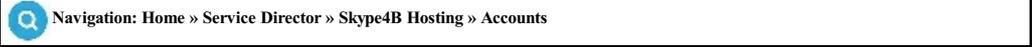
Click on **Manage**. Under **Response Group** tab, click on **Queues** tab. To [add a new Queue](#) click on **Add New Queue** button.

It will display the following listings:

1. **Queue Name:** It shows the name of the queue.
2. **Description:** It displays the description of the queue.
3. **Options:** You can Edit or Remove the queues from the listing by clicking on the respective link.

Adding a Queue

A queue can contain multiple agent groups, or sometimes just a single agent group is included. Settings such as time Outs, and call capacity are configured at the queue level. To add a queue navigate to the following path:

 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 work flows navigate to the following path:



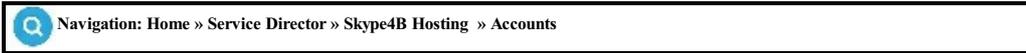
Click on **Manage**. Under **Response Group** tab, click on **Workflows** tab you will see the following:

To [add a new workflow](#) click on **Add New Workflow** button. If you want to [manage a holiday set](#) for the workflow click on the **Manage Holiday Sets** button. If you want to [manage business hours](#) for the workflow click on the **Manage Business Hours** button.

1. **Workflow Name:** It displays the name of the workflow.
2. **Active:** It shows that the work flow is active or not.
3. **Template:** It shows the name of the response group template.
4. **Address:** It displays the address of the workflow.
5. **Language:** It displays the language of the workflow.
6. **Managed:** It displays that it is managed workflow or not.
7. **Delete:** Delete the workflow form the listing by clicking on the respective link.

Adding a Workflow

Workflows ties together the agent groups and queues. The workflow settings determine how a caller reaches a specific queue depending on question responses, time of day, or holidays. To add work flows navigate to the following path:



Click on **Manage** and select **Response Group** tab. Now select **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.

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

2. 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:
 - a. Use text-to-speech
 - b. 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:
 - a. **Use a preset schedule:** Select a predefined schedule from the dropdown list.
 - b. **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 manage holiday sets, navigate to the following path:

 Navigation: Home » Service Director » Skype4B Hosting » Accounts

Click on **Manage** and select **Response Group** tab. Now click on **Workflows** tab:

To manage holiday sets click **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.

Persistent Chat

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

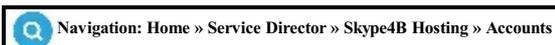
 Navigation: [Home](#) » [Service Director](#) » [Skype4B Hosting](#) » [Accounts](#)

Click on **Manage** and select **Persistent Chat** tab:

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

Adding Chat Categories

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

 Navigation: Home » Service Director » Skype4B Hosting » Accounts

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.
 - i. Enable Invitations
 - ii. Enable File Upload
 - iii. 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:

 Navigation: Home » Service Director » Skype4B Hosting » Accounts

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 Contacts

To view Contacts navigate to the following path:

 Navigation: Home » Service Director » Skype4B Hosting » Accounts

Click on **Manage** and select **Contacts** tab. You can provide any of below field and and click **Search** to search contacts.

1. Display name
2. Email Address
3. SIP Address
4. Phone number

To add a new contact click [Add Contact](#) or you can also **Add Bulk Contacts**. It shows following listing for contacts:

1. **Display name:** It shows the display name of the contact.
2. **External email:** It shows the external email address.
3. **SIP Address:** It shows the SIP address.
4. **Phone number:** It shows the phone number.
5. **Status:** It shows the status of the contact.
6. **Options:** You can **delete** the contact from options.

Adding Contact

To add new Contacts navigate to the following path:

 Navigation: Home » Service Director » Skype4B Hosting » Accounts

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

1. **Display name:** Provide display name of contact.
2. **External email:** Provide external email address.
3. **SIP Address:** Provide SIP address.
4. **Phone number:** Provide phone number.

Click **Add Contact** when done. You can also **Add Bulk Contacts** by selecting CSV file to import bulk contacts.

Enable Meeting Rooms

To enable meeting rooms navigate to the following path:

 Navigation: Home » Service Director » Skype4B Hosting » Accounts

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

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

Phone Number Inventory

To add phone numbers to your Skype4B hosting account navigate to the following path:

 Navigation: Home » Service Director » Skype4B Hosting » Call Settings

It displays the following listing:

1. **Phone number:** It shows the Phone Number.
2. **Assigned To:** It shows the user to user to which the number is assigned.
3. **Group name:** It shows the Phone Group name.
4. **Options:** You can remove a number from options.

Select **Import Numbers** button under **Phone Number Inventory** tab.

Provide Phone numbers **On Fly** or use **CSV file to bulk import** phone numbers.

Then click on **Save** button.

Add Phone Group

To add phone group to your Skype4B hosting account navigate to the following path:

 Navigation: Home » Service Director » Skype4B Accounts

Select **Phone Group** button under **Phone Number Inventory** tab. It displays the following listing:

1. **Group name:** It shows the phone group name.
2. **Customer:** It shows the customer of the phone group.
3. **Total Numbers:** It shows the total numbers of the groups
4. **Options:** From options you can **Edit** and **Remove** the phone group.

To add a phone group click on the **Add Phone Group** button.

1. **Group name:** Enter the name of the phone group.
2. **Select Customer:** Select the customer from the drop down list.
3. **Import Numbers:** Import phone numbers.

Then click on **Save** button.

Skype for Business Plan Management

Skype for Business Hosting Plans are created through powerful Service Plan Wizard. It includes following:

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

To create a Skype for Business hosting plan navigate to following path:



Note: You can also edit existing Skype for Business plans by clicking the **Edit** at desired plan that you want to modify.

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

1. **Product Type:** Select **Skype for Business Products** from the drop-down list.
2. **Product Name:** Enter the name of your product.
3. **Provider:** Select your desired Skype for Business provider from the drop down list..
4. **Is Active:** Select No if you want to disable this product selling.
5. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
6. **Associate Addon:** You may want to associate addon with this product. Your choices are:
 - a. Optional
 - b. Required
 - c. Suppressed
7. **Associate Domain:** Select how you want to associate domains with this product.
 - a. Required
8. **Profit to add on call cost:** Provide percentage of profit to add on a Call Cost.
9. **Date:** It shows the date when product is created.
10. **Sync sold plan resources:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings.
11. **Product Comments:** Enter any comments you to associate with this product. These comments show up on the store-front when this product is selected.

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

Limits

1. Check box to **Use Common Provider Domain**
2. **No. of SIP Domains:** Enter the no. of SIP domains or check Unlimited.
3. **Maximum number of users:** Enter the maximum no. of users or check Unlimited.
4. **Automatic Provisioning:** Select to enable automatic DID provisioning.
5. **DID Specification:** Specify Country, Region, Type, Quantity etc.

Service Features

1. **Enable Line URI Extension:** Check this option to enable the line URI extension for the Skype4B account.
2. **Enable Persistent Chat Feature:** Check this option to enable the chat feature for the Skype4B account.
3. **Associate Call Bundle:** You call select Call Bundle to associate it with a Plan.
4. **SPLA Type** Select SPLA type.

Service Policies

1. **Telephony:** You can select telephony option options from the drop down list.
2. **Dial Plan:** You can select dial plan from the drop down list.
3. **Voice Policy:** You can select voice policy from the drop down list.
4. **Conferencing Policy:** You can select conferencing policy from the drop down list.
5. **Voice Mail Policy:** You can select voice mail policy from the drop down list.
6. **Client Version Policy:** You can select client version policy from the drop down list.
7. **PIN Policy:** You can select PIN policy from the drop down list.

8. **External Access Policy:** You can select external access policy from the drop down list.
9. **Archiving Policy:** You can select archiving policy from the drop down list.
10. **Location Policy:** You can select location policy from the drop down list.
11. **Client Policy:** You can select client policy from the drop down list.
12. **Mobility Policy:** You can select Mobility policy from the drop down list.
13. **Persistent Chat Policy:** You can select Persistent Chat policy from the drop down list.

Click on **Next** button.

Payment Cycles: This form lets you select Payment Cycles for the plan.

- **Call bill frequency:** Select Call bill frequency i.e Weekly, Monthly etc.

You must select at least one payment cycle and payment group.

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

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

1. Setup Price
2. Price
3. Discount

Enter prices in each box.

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

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

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

Usage Report

To view Usage report navigate to the usage report.

Navigation: Home » Service Director » Skyp4B Hosting » Usage Report

You can search Usage report by providing following:

1. **Owner:** It is the name of the owner.
2. **Customer Name:** It is the customer name.
3. **Organization Name:** It is the organization name.
4. **Company Name:** It is the company name.

Then click on **Search** Button. 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. **Customer:** It displays the name of the customer along with id.
4. **Product Name:** It displays the product name.
5. **Owner:** It displays the name of the owner.
6. **Active Domains:** It displays the number of active domains.
7. **Users:** It displays the number of users.
8. **Phone Numbers:** It displays the phone number.

Under **User Usage Report** you can view following in report.

1. **Organization Name:** It displays the name of the organization.
2. **Customer:** It displays the name of the customer along with id.
3. **Owner:** It displays the name of the owner.
4. **Skype4B User:** It displays the users.
5. **SPLA Type:** It displays the spla type of users.
6. **Phone Numbers:** It displays the phone number.

Viewing Call Report

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

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

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 Conference Call Reports as Conference Call Report, Organization Conference Report, User Conference Report

Under **Conference Call Report** tab, it will display the following listings:

1. **Company name:** It shows the company name.
2. **Organization Name:** It shows the organization name.
3. **Customer Name:** It shows the customer name.
4. **dispNUM Owner:** It shoe the customer number.
5. **Total Conferences:** It shows the total number of conferences.
6. **Total Calls Duration:** It shows the total duration of the conference calls.
7. **Total Cost:** It shows the total cost.

Orchestration Module for Microsoft Hyper-V

Control Panel allows Virtual Machines Hosting through its Orchestration Module for Microsoft Hyper-V. Control Panel Orchestration Module for Microsoft Hyper-V is designed for all sizes of service providers wanting to start or grow their Virtual Machines Hosting business while minimizing ongoing support costs.

Control Panel Orchestration Module for Microsoft Hyper-V fully automates and controls service delivery for Microsoft Hyper-V Server 2022 and its legacy versions, manages billing and provides self service control panel to your customer.

1. Microsoft Hyper-V Server 2008
2. Microsoft Hyper-V Server 2012
3. Microsoft Hyper-V Server 2012 R2
4. Microsoft Hyper-V Server 2016
5. Microsoft Hyper-V Server 2019
6. Microsoft Hyper-V Server 2022

Note: Please make sure you have subscribed to Orchestration Module for Microsoft Hyper-V to avail this service otherwise you won't be able to utilize this feature. If you have any questions or want to avail this feature, please contact your service provider.

Add Virtual Machine

A virtual machine (VM) is a software program or operating system that not only exhibits the behavior of a separate computer, but is also capable of performing tasks such as running applications and programs like a separate computer.

To add a virtual machine navigate to following path:

 Navigation: Home » Customer Manager » Customers

Now click on the "Customer ID", Select **Subscriptions** tab and click on the Hyper-V subscription.

 Navigation: Home » Customer Manager » Subscription List

Once you click the Hyper-V subscription you will be on following navigation path:

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

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

Select **Virtual Machines** tab:

To add a new Virtual Machine, click on **Add Virtual Machines** button and fill in the following fields:

1. **Virtual Machine Name:** Provide the name of the virtual machine name.
2. **CPU Cores:** Provide no of CPU cores.
3. **RAM (MB):** Provide RAM in MB.
4. **Disk Space (GB):** Provide disk space in GB.
5. **Snapshots:** Provide the no of Snapshots.
6. **No. of External IP Addresses:** Provide the no of external IP addresses.
7. **Select IP:** Select IP's from the list.
8. **Sealed Images:** Select sealed image from the drop down list.

Click on **Add** button when done.

Once the Virtual Machine is processed, you can [Manage Virtual Machines](#).

Virtual Machines

To view/manage Virtual Machines, navigate to the following path:

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

It displays the following listing:

1. **Enabled:** Tick means enabled.
2. **Subsc.ID:** It displays the subscription number.
3. **Virtual Machine Name:** It displays the name of the virtual machine.
4. **Customer ID:** It shows the customer ID.
5. **Customer Name:** It displays the name of the customer.
6. **Company name:** It displays the name of the company.
7. **Options:** Click on [Manage](#) from option to manage services for Virtual Machines.

Virtual Machines Management

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

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

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

1. **Dashboard:** Under **Dashboard** tab, you can view the general settings of the VPS (Hyper-v) account such as subscription ID, account info etc. Also you can view the usage such as virtual machine, CPU, memory, disk usage in graphs.
2. **Management:** Select **Management** tab for the [machine operations and network management](#).

IP Settings

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

Navigation: Home » Customer Manager » Subscription List

Once you click the Hyper-V subscription you will be on following navigation path:

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

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

Select **IP Settings** tab:

It shows the following listing:

1. **IP Address:** It shows the IP address.
2. **Status:** It shows the status.
3. **Options:** You can remove an IP address from options.

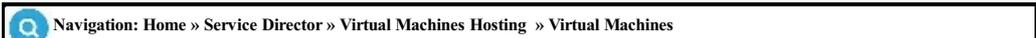
To add new IP click on **Add IP Address** button.

Select **IP** from the list under **Add new IP** section.

Click on **Save** button when done.

Virtual Machine Management

To manage virtual machines and networks navigate to the following path:

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

Click on **Manage**. 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. **Change Password:** You can change password of a VM.
7. **Sync VM:** You can Move To another 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.

Disk Management:

You can also add new disk by clicking on **Add Disk** button.

1. **Remove:** To remove existing disk.
2. **Expand:** To expand the disk space.
3. **Move To:** You can Move Disk.

ISO Image:

You can attach ISO image to machine.

Boot Order:

You can add Boot Order, Move boot order up & down. Click **Save** when done.

Network Management:

1. **Address:** It displays the IP address. To remove an IP select address from the list a **Remove IP Address** button.
2. **DNS Address:** It shows the DNS address. To remove the DNS address select it from the list and click on **Remove DNS Address** button.
3. **VLAN ID:** It shows the VLAN ID for e.g.10. You can also change your VLAN ID by clicking on **Change** button.
4. **Gateway:** It shows the gateway address.
5. **Subnet Mask:** It shows the subnet mask.
6. **NIC Disable due to band width over use:** It shows disabled NIC due to bandwidth overuse YES or NO.

7. **MAC Address:** It shows MAC addresses.

You can also **Add Public and Private IP's** under **Network Management** section.

1. To manage existing NIC click **Manage**.
2. To remove IP addresses click **Delete**.

Snapshots

To manage snapshots 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:

[Home](#) » [Service Director](#) » [Virtual Machines Hosting](#) » [Virtual Machines](#)

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

Virtual Machines Hosting Plan Management

Virtual Machines Hosting support feature allows you to add hosting products for your customers. It also allows you to create add-ons for Virtual Machines hosting products under the **Add-on Management** tab.

To view/manage Virtual Machines Hosting products navigate to the following path:

 Navigation: Home » Service Plans » Virtual Machines Hosting

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

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

1. **Product Type: Virtual Machines Hosting** from the drop-down list is selected.
2. **Product Name:** Enter the name of your product.
3. **Provider:** Select Hyper-V as a provider.
4. **Server Group:** Select the desired server group from the drop down list.
5. **Single VM:** Select If you want to enable it for single VM.
6. **Metered Billing:** Select if you want to enable Metered billing for resellers and customers.
7. **TS Gateway FQDN:** Provide TS Gateway FQDN.
8. **Is Active:** Select No if you want to disable this product selling.
9. **Associate Addon:** You may want to associate addon with this product. Select Yes or No.
10. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
11. **Associate Domain:** Select how you want to associate domains with this product.
12. **Sync sold plan resources:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings.
13. **Product Comments:** Enter any comments you to associate with this product. These comments show up on the store-front when this product is selected.

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

1. **Maximum VPS:** Enter the maximum number of VPS.
2. **Virtual Processors:** Provide no of total number of virtual processors allowed.
3. **RAM Per VPS (MB):** Provide RAM size per VPS in MB.
4. **Memory Type:** You can select Memory type Static RAM, Dynamic RAM or both.
5. **Memory Weight:** Provide memory weight for each VM.
6. **Bandwidth Allowed Per Month(GB):** Provide bandwidth allowed per month in GB.
7. **Disk Space per VPS (GB):** Provide disk space per VPS (GB).
8. **VHD Type:** Select VHD type: Fixed, Dynamic, Both.
9. **Auto Create Additional disks:** If this is checked Provide
 - i. Disk Name
 - ii. Storage Type
 - iii. Size (GB)
10. **Snapshots:** Provide no of maximum snapshots per VPS.
11. **No. of Public IP Addresses:** Provide the no of Public IP addresses per VPS.
12. **No. of Private IP Addresses:** Provide the no of Public IP addresses per VPS.
13. **Public NIC Bandwidth Tiers:** Select public bandwidth tiers.
14. **Private NIC Bandwidth Tiers:** Select private bandwidth tiers.
15. **Available disk images:** Check if the disk image is available.

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

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

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

Payment Groups: This form lets you set prices for the Payment Cycles and Payment Groups you have selected in the

previous step. Here you may set:

- a. Setup Price
- b. Price
- c. Discount

Enter prices in each box.

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

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

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

Usage Report for Virtual Machine

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:** It shows the company name.
2. **Customer Name:** It shows the customer name.
3. **Customer number:** It shows customer number.
4. **Package Name:** It shows the package name, the VM is using.
5. **Owner:** It shows the name of owner.
6. **VM Name:** It shows the name of VM.
7. **CPU Cores:** It shows total number of CPU cores.
8. **RAM (MB):** It shows the RAM.
9. **Operating System:** It shows the operating system.
10. **No Of Disks:** It shows the number of disks
11. **Total Disks Space:** It shows total disk space.
12. **Total Public NICs:** It shows total public NICs.
13. **Total Private NICs:** It shows total public IPs.
14. **Total Private IPs:** It shows total number of private IPs.
15. **Date Created:** It shows the date when it is created.

Orchestration Module for Microsoft CSP

Control Panel allows Microsoft CSP/Office365 Service through its Orchestration Module for CSP. Orchestration Module for Microsoft CSP fully automate and manage entire life cycle 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 by providing Provisioning, Management, support & Bill Microsoft CSP.

Control Panel automate all aspects of your financial operations with ability to Direct billing to customers with unified & consolidated invoices to simplify the billing process for Microsoft Office365, Azure CSP Billing.

Note: Please make sure you have subscribed to Orchestration Module for Microsoft CSP to avail this service otherwise you won't be able to utilize this feature. If you have any questions or want to avail this feature, please contact your service provider.

Manage 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. **Tenant Name:** It shows the tenant name.
4. **Domain:** It shows the Domain of the tenant.
5. **Package Name:** It shows the package to which the tenant is subscribed.
6. **Customer:** It shows its customer name.
7. **Company Name:** It shows the name of company.
8. **Owner:** It shows the name of owner i.e. Host
9. **Options:** It displays the options to [Manage](#) and [Edit](#) account.

Send CSP Invitation

To send CSP invitation to customer navigate to the path mentioned below:



Click **Send CSP Invitation** to customers by email:

From: Select owner/customer from dropdown list.

1. **Select Language:** Select Language.
2. **Select CSP Profile:** Select CSP profile
3. **Invitation Link:** Provide Invitation link
4. **To Address:** Provide to address
5. **CC:** Provide CC address.
6. **Subject:** Enter Subject of email
7. **Body:** Customize body of email.

Click **Save** when done

CSP Tenants Service Management

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

 Navigation: Home » Service Director » Microsoft CSP » Accounts

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

 Navigation: Home » Service Director » Microsoft CSP Management » Tenant detail

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:

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

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 Tenants

To Edit tenant details, navigate to following path:



Click **Manage** in front of CSP Tenant. Select **General Settings** tab. You can perform following operation on a CSP Tenant under **general settings** tab:

1. **Edit:** You cannot edit owner, customer and tenant name.
 - i. **Select Owner:** It shows Owner name.
 - ii. **Select Customer:** It shows customer name.
 - iii. **Tenant Name:** It shows Tenant name
 - iv. **Administrator login:** It shows Administrator login.
 - v. **Password:** Leave blank if you do not want to change.
 - vi. **Country:** It shows the dropdown list to select country.
 - vii. **Select Locale:** Select locale.
2. Sync All with Microsoft CSP.
3. Sync Domains, Licenses, Policies and roles.

General

1. **Subscription ID:** It shows the subscription ID and name by click you will go to [subscription details](#).
2. **Customer:** It shows customer Id and name by click on it you will go to customer detail.
3. **Owner:** It shows owner.
4. **Tenant Name:** It shows the tenant name.
5. **Admin email:** It shows Admin email.
6. **Admin password:** It shows password when you click show password.
7. **Manage tenant using panel:** Select disable to disable management of tenant using control panel.
8. **Azure AD Sync enabled:** It shows if Azure AD Sync enabled
9. **Exchange Hybrid Mode enabled:** It shows if Hybrid Mode is enabled.

License Information:

It shows following columns which shows units along with name.

1. Name
2. Active Units
3. Consumed Units
4. Locked-Out Units
5. Suspended Units
6. Warning Units

Manage Tenant Using Panel

To manage CSP Accounts navigate to the following path as shown below:



Click on **Manage** in front of a CSP Tenant.

Manage tenant using panel: Select Enable to enable management of tenant using control panel. Provide Global Admin user details:

1. **Admin email:** It shows Admin email.
2. **Admin password:** It shows password when you click show password.

Change Package (CSP)

To Change Package or upgrade/downgrade Offers/sub-offers(Add-ons) navigate to the following path:

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click **Manage** in front of CSP Tenant. Select **General Settings** tab. Click on the **Subscription ID**, you will be on following navigation path:

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

You will be able to view details of the subscription you have clicked and will be able to perform various operations on subscription. Under **General Info** tab click **Change Package**.

Select **Package** and the **Billing cycle**. Click **Save** when done.

CSP Subscriptions

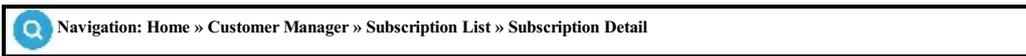
In CSP each subscription have unique set of offer(s)/addon(s). You can increase/decrease license count as well add new add-ons (sub-offers) by clicking on subscription.

To view CSP subscriptions details, navigate to following path:

 Navigation: Home » Service Director » Microsoft CSP » Accounts

Click **Manage** in front of CSP Tenant. Select **General Settings** tab.

Click on the **Subscription ID**, you will be on following navigation path:

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

You will be able to view details of the subscription you have clicked and will be able to perform various operations on subscription. Select **Subscriptions** tab. You have following option for subscription management:

1. [Add subscription](#)
2. [Import Active/Inactive Subscription](#)
3. [Convert trial offers to Billing](#)
4. [Increase/Decrease Licenses](#)
5. [Activate/suspend subscription](#)
6. [Upgrade subscription](#)

Add CSP Subscription

To add & manage CSP subscriptions navigate to the following path as shown below:

 Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of a CSP Tenant. Under **General** tab you will see **subscription ID and name** by clicking on it you will go to subscription details.

Select **Subscriptions** tab, Click **Add Subscription** to add a new subscription.

Increase/Decrease License

To increase/decrease License quantity of a CSP subscription navigate to the following path as shown below:



Click on **Manage** 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:

 Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of a CSP Tenant. Under **General** tab you will see **subscription ID and name** by clicking on it you will go to subscription details.

Select **Subscriptions** tab, 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:



Click on **Manage** in front of a CSP Tenant. Under **General** tab you will see **subscription ID and name** by clicking on it you will go to subscription details.

Select **Subscriptions** tab, click **Import Subscription** button.

Import Trial subscription

In order to import a **Trial Subscription** (Inactive) you need to create a Trial CSP Product by choosing required Trial CSP Offers/Add-ons.

See Also [Create a CSP Product](#)

Trial offers do NOT support **quantity** update and **status (suspend/resume)** update.

Trial subscriptions will not be billed, they will be shown under **Trial Subscription**. To view navigate to the following path as shown below:



Trial offers can also be converted to paid/billed offers. Click on the name of Trial Offer, select new offer in "**Convert To**" and click **Save**.

Upgrade existing CSP Subscription

You can upgrade the existing subscriptions along with Add-ons. To upgrade an existing CSP subscription navigate to the following path as shown below:

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of a CSP Tenant. Under **General** tab you will see **subscription ID and name** by clicking on it you will go to subscription details.

Select **Subscriptions** tab, click on the name of subscription. Select new Offer / available add-ons and **Save**.

Convert Trial Offers

Trial offers (Inactive subscriptions) can also be converted to paid/billed offers. Click on the name of Trial Offer, select new offer in "**Convert To**" and click **Save**.

Account Information

To view and update CSP account information, navigate to the following path as shown below:



Click on **Manage** in front of CSP tenant. Select **Account Information** tab. You can update following for a CSP account:

Microsoft ID: You can view the Microsoft ID of the account.

Bill-to info

1. **First Name:** Here provide the First name.
2. **Last Name:** Here provide the Last name.
3. **Company Name:** Here provide the customer name.
4. **Address:** Here provide the Address.
5. **City:** Here provide the city.
6. **Country/Region:** It shows country region.
7. **State/Province:** It shows State/ Province
8. **Zip/Postal Code:** Here provide the postal code.
9. **Phone Number:** Here provide the phone number.
10. **Email Address:** Here provide the email address.

Company Information

1. **Company:** It shows company name.
2. **Primary Contact:** It shows primary contact.

Update Microsoft Agreement

To update Microsoft agreement of a CSP account navigate to the following path as shown below:

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of CSP tenant. Select **Account Information** tab. Click **Update**.

CSP Domains

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

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of a CSP Tenant. Now select **Domainstab**. 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. **AuthenticationType:** 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** in front of a CSP Tenant. Now select **Users** tab. To add a new user click [Add User](#) button. You can also **Add Bulk Users**, perform [Group Operations](#) for Users and **Sync All with Microsoft CSP**.

It displays following:

1. **Sign-In Status:** It shows the Sign-In status of the user.
2. **Display name:** It shows the display name of User.
3. **User Principal Name:** It shows the UPName of User.
4. **Licenses:** It displays the licenses of the user
5. **Role:** It shows the role assigned to user.
6. **Status:** It displays the status of the user.
7. **Options:** It shows the options to **Edit, Remove**.

Add CSP Users

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



Click on **Manage** in front of a CSP Tenant. Now select **Users** tab. To add a new user click **Add User** button.

General Settings

1. **First Name:** Provide First name of the user.
2. **Last Name:** Provide Last name.
3. **User Display Name:** Provide user display name.
4. **User Principal Name:** Provide UPName.
5. **Password:** Provide password.
6. **Make this person change their password the next time they sign in:** Check this option to enable it.
7. **Password never expires:** Check this option to set password never expires.
8. **Send Email:** Check this option to send email and provide email address.

Settings

1. **Assign role:** Check this option to assign role and select role.
2. **Alternate email:** Alternate email address is mandatory when assigning a role to the user. Otherwise this can be left blank
3. **Sign-In Status:** Select on of the following:
 - a. Allowed
 - b. Blocked

Licenses

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

Click **Save** when done.

Group Operations

To view Group Operations, navigate to the following path as shown below:



Click on **Manage** in front of a CSP Tenant. Now select **Users** tab. To perform group operations click **Group Operations** tab.

You can search users by User Principal Name, Display name, Alternate email, Role, Sign-In Status, License Status. You can also use Advanced Search.

Users/Mailboxes: Select Users / Mailboxes

1. **General Information:** You can update following under general information Department, Office, Phone (Business), Fax, Street Address, City, State/Province, Zip/Postal Code, Country/Region.
2. **Archiving:** You can enable/disable archiving.
3. **Permissions And Licenses:** You can assign role, status and licenses etc.
4. **Mailbox General Settings:** You can change Language, time zone etc.
5. **Membership:** You can add distribution list member ship.
6. **Litigation Hold:** You can enable/disable litigation hold.
7. **Add Email Alias:** You can set email address and domain.
8. **Unified Messaging:** You can enable/disable UM.
9. **Email Forwarding:** You can set email forwarding.
10. **Grant Permission:** You can grant permissions such as send As, Full Access etc.
11. **Remove Permission:** You can remove permissions.
12. **Calendar Permissions:** You can assign calendar permissions.
13. **Automatic Reply:** You can set automatic reply.
14. **Update Password:** You can update password.

Viewing Shared Mailboxes

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

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of a CSP Tenant. Now select **Shared Mailboxes** tab. To add a new shared mailbox click [Add Mailbox](#) button. You can also **Sync All with Microsoft CSP**.

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 Mailboxes

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

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of a CSP Tenant. Now select **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.
2. **Custom Attributes:** Select Custom Attributes for the Shared Mailbox.
3. **Email Addresses:** Provide here email address.
4. **Mailbox features:** You can provide following mailbox features for shared mailboxes.
 - i. **Policies**
 - a. **Sharing Policy:** Select sharing policy.
 - b. **Role Assignment Policy:** Select role assignment policy.
 - c. **Retention policy:** Select retention policy.
 - d. **ActiveSync enabled:** Check to enable ActiveSync.
 - ii. **Email Connectivity**
 - a. **OWA Enabled:** Check to enable OWA.
 - b. **IMAP Enabled:** Check to enable IMAP.
 - c. **POP3 Enabled:** Check to enable POP3.
 - d. **MAPI Enabled:** Check to enable MAPI.
 - iii. **Mailbox Archive:** Check to enable Mailbox Archive and provide Mailbox archive name.
 - iv. **Mail Flow Settings:** Check this option to Enable email forwarding and select from the dropdown list.
5. **Message Size Restrictions**
 - i. **Maximum sent message size (KB):** Provide size in KB.
 - ii. **Maximum received message size (KB):** Provide size in KB.
6. **Message Delivery Restrictions:** Select senders as per requirement.
 - i. **Accept messages from:** Select one of following: a). All senders b). Only senders in the following list
 - ii. **Require that all senders are authenticated:** Check to enable this option
 - iii. **Reject message from:** a). No senders b). Senders in the following list
 - iv. **Mail Tip:** Provide mailtip.
7. **Mailbox Permissions:** You can select mailboxes for Send As, and Full Access Permissions.
8. **Calendar Permissions:** Click **Add Permission** to add calendar permissions, Select **Member** and **Permission Level** and save.

Click **Save** when done.

Viewing Resource Mailboxes

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

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of a CSP Tenant. Now select **Resource Mailboxes** tab. To add a new resource mailbox click **Add Mailbox**.

1. [Room Mailbox](#)
2. [Equipment Mailbox](#)

It displays following listing:

1. **Display name:** It shows the display name of mailbox.
2. **Primary SMTP email:** It shows the primary SMTP email.
3. **Mailbox Type:** It shows the type of resource Mailbox.
4. **Licenses:** It shows the licenses.
5. **Email alias name:** It shows the email alias name.
6. **Hide from Exchange Address Lists:**It shows if it is hidden from Exchange Address list.
7. **Status:**It shows the status of the mailbox.
8. **Options:** It shows the option to **Edit** and **Delete** the mailbox.

Add Resource Mailbox (Room Mailbox)

To add room mailboxes navigate to the following path as shown below:

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** 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 Setting** section provide following:

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

Under **Licenses** provide following:

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

Under Exchange Properties section you can provide following information.

1. **General Settings:** You can select and provide following in general settings.
 - i. **Email alias name:** Provide email alias name.
 - ii. **Resource Capacity:** Provide resource capacity.
 - iii. **Hide from Exchange Address Lists:** Check if you want to hide from Exchange address list
 - iv. **Language:** Select Language
 - v. **Time zone:** Select Time zone.
 - vi. **Manager:** Select Manager.
2. **Custom Attributes:** Select Custom Attributes for the Shared Mailbox.
3. **Email Addresses:** Provide here email address.
4. **Mailbox features:** You can provide following mailbox features for shared mailboxes.
 - i. **Policies**
 - a. **Sharing Policy:** Select sharing policy.
 - b. **Role Assignment Policy:** Select role assignment policy.
 - c. **Retention policy:** Select retention policy.
 - d. **ActiveSync enabled:** Check to enable ActiveSync.
 - ii. **Email Connectivity**
 - a. **OWA Enabled:** Check to enable OWA.
 - b. **IMAP Enabled:** Check to enable IMAP.
 - c. **POP3 Enabled:** Check to enable POP3.
 - d. **MAPI Enabled:** Check to enable MAPI.
 - iii. **Mailbox Archive:** Check to enable Mailbox Archive and provide Mailbox archive name.
 - iv. **Mail Flow Settings:** Check this option to Enable email forwarding and select from the dropdown list.
5. **Message Size Restrictions**
 - i. **Maximum sent message size (KB):** Provide size in KB.
 - ii. **Maximum received message size (KB):** Provide size in KB.
6. **Message Delivery Restrictions:** Select senders as per requirement.
 - i. **Accept messages from:** Select one of following: a). All senders b). Only senders in the following list
 - ii. **Require that all senders are authenticated:** Check to enable this option
 - iii. **Reject message from:** a). No senders b). Senders in the following list
 - iv. **Mail Tip:** Provide mailtip.
7. **Booking Settings**
 - I. Booking Delegates
 - A. **Booking requests:** Select one of the following for booking requests
 1. Accept or decline booking requests automatically
 2. Select delegates who can accept or decline booking requests
 - B. **Booking Options**
 1. **Specify when this room can be scheduled:** You have following option in booking.
 - a. **Allow repeating meetings:** Check this option to enable repeated meeting.
 - b. **Allow scheduling only during working hours:** Check this option to book during office hrs

only.

c. **Always decline if the end date is beyond this limit:** Check to enable this option

d. **Maximum booking lead time (days):** Provide no of days.

e. **Maximum duration (hours):** Provide duration in hrs.

2. **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:

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of a CSP Tenant. Now select **Resource Mailboxes** tab. To add a new Equipment mailbox click **Add Mailbox (Equipment Mailbox)** button.

Under **General 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.

Click **Save** when done.

Add Mail Contacts

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



Click on **Manage** in front of a CSP Tenant. Now select **Mail Contacts** tab. To add a new contact click **Add Mail Contact** button. You can also **Sync All with Microsoft CSP**.

You can search users by Display name and Value.

1. **Display name:** Provide friendly name for Contact
2. **Email Address:** Provide Email address for the contact.
3. **Alias:** Provide alias for the contact
4. **Hide from Exchange Address Lists:** Check if you want to hide from Exchange address list.

Click **Save** when done.

Viewing CSP Groups

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



Click on **Manage** in front of a CSP Tenant. Now select **Groupstab**. 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 Group

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



Click on **Manage** in front of a CSP Tenant. Now select **Groups** tab. To add a new Group click **Add Group** button.

1. **Group Type:** Select the type of group you want to add: Distribution Group, Dynamic distribution group, Mail enabled Security Group, Security Group or Office 365 group.
2. **Display name:** Provide the display name of the group.
3. **Email Address:** Provide Email address of the group.
4. **Group Name:** Provide group name.
5. **Group Alias:** Provide group alias.
6. **Hide from address list:** Check if you want to hide from exchange address list.
7. **Group Owner:** Select owner of the group.
8. **Add group owners as members:** Check if you want to add owners as members.

In addition to above you add also configure following:

1. **Group Members:** Select Group Members.
 - 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.

Viewing SharePoint (CSP)

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

 Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** and 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** and 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:



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:

 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 **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.

Permissions Level (CSP SharePoint)

To view permissions level of SharePoint site(s) under CSP account navigate to the following path:

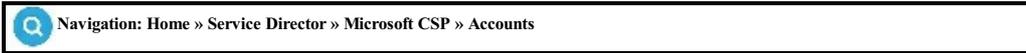
Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of the CSP tenant/account. Select **SharePoint** tab.

Now select **Edit** from options column of a SharePoint site. Under **Permission Levels** tab you can view permissions levels with Name & Description.

Group Operations for SharePoint (CSP)

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



Click on **Manage** and select **SharePoint** tab. Click **Group Operations** to perform Group Actions for SharePoint sites, users, groups etc. You will see following options for Group Actions.

Select Sites: Select sites from selectables to selected an select following Group Operations.

1. **General Information:** You can perform following under General Information:
 - i. **Request Access Email:** Provide and check Update.
 - ii. **Allow Designer:** Select one of following three options: a). No Change b). Yes c). No
 - iii. **Share By Email:** Select one of following three options: a). No Change b). Yes c). No
 - iv. **Allow Rss Feeds:** Select one of following three options: a). No Change b). Yes c). No
 - v. **Sharing Capability:** Select and check Update. Click **Save** when done.
2. Add Internal Users
 - i. **Users:** Select Users from selectables to selected.
 - ii. **Permission Levels:** Select Permission levels from selectables to selected.
 - iii. **Groups:** Select Groups from selectables to selected.
 - iv. **Is Admin:** Tick means yes.
 - v. Click **Save** when done.
3. Add External Users
 - i. **Users:** Select Users from selectables to selected.
 - ii. **Permission Levels:** Select Permission levels from selectables to selected.
 - iii. Click **Save** when done.
4. Add Groups:
 - i. **Name:** Enter group(s) name separated by comma
 - ii. **Owner:** Select owner from dropdown list.
 - iii. **Permission Levels:** Select Permission levels from selectables to selected.
 - iv. Click **Save** when done.
5. Update Internal Users
 - i. **Users:** Select Users from selectables to selected.
 - ii. **Permission Levels To Add:** Tick means yes.
 - iii. **Permission Levels To Remove:** Tick means yes.
 - iv. **Groups To Add:** Tick means yes.
 - v. **Groups To Remove:** Tick means yes.
 - vi. **Is Admin:** Select one of following three options: a). No Change b). Yes c). No
 - vii. Click **Save** when done.
6. Update External Users
 - i. **Users:** Enter user(s) email separated by comma
 - ii. **Permission Levels To Add:** Tick means yes.
 - iii. **Permission Levels To Remove:** Tick means yes.
 - iv. **Groups To Add:** Tick means yes.
 - v. **Groups To Remove:** Tick means yes.
 - vi. Click **Save** when done.
7. Update Groups:
 - i. **Groups:** Enter group(s) name separated by comma.
 - ii. **Owner:** Select owner from dropdown list.
 - iii. **Permission Levels To Add:** Tick means yes.
 - iv. **Permission Levels To Remove:** Tick means yes.
8. **Remove Internal Users:** Select users and provide reason.
9. **Remove External Users:** Select users and provide reason.
10. **Remove Groups:** Select Groups and provide reason.

Configure Direct Routing

To configure direct routing, navigate to the following path as shown below:



Click on **Manage** in front of a CSP Tenant. Now select **Direct Routing** tab.

1. **Domain:** Select domain to configure direct routing. Click **Verify Domain**
2. **Activate Direct Routing:** Click assign License

Click **Finish** when completed.

Once the direct routing is activated you can manage following:

1. **Assignments:** Under [Assignments](#) section you can Assign Direct Routing to Users/Resources. You can also use excel to assign direct routing in bulk.
2. **Audio Conferencing:** Under [Audio conferencing](#) section you can assign and select phone numbers for audio conferencing.
3. **Phone Numbers:** You can Add [Phone numbers](#), Search and remove under Phone Numbers section
4. **Service Phone Numbers:** You can Add [Service Phone numbers](#), Search and remove under Service Phone Numbers section:
5. **Dial Plan:** You can [add Normalization Rules](#) & [Dial Plans](#) under Dial Plans.
6. **Resources:** You can view and add new [resources](#).

Assignments (Direct Routing)

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

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of a CSP Tenant. Select **Direct Routing** tab.

Now select **Assignments** tab.

1. Under **Assignments** section you can **Assign Direct Routing** to Users/Resources. You can also use excel to assign direct routing in bulk.
2. **Sync Users and Resources** which already have assigned direct routing / phone numbers at backend CSP

Assign direct Routing

1. **Users/Resources:** Select User or Resource
2. **Voice Routing Policy:** Select voice routing policy
3. **Enterprise Voice Enabled:** Check box
4. **Hosted Voice Mail Enabled:** Check box
5. **Phone Number:** Select Phone number.

Click **Save** when done.

Audio Conferencing (Direct Routing)

To configure audio conferencing in direct routing, navigate to the following path as shown below:

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of a CSP Tenant. Select **Direct Routing** tab.

Now select **Audio Conferencing** tab.

Under **Audio conferencing** section you can assign and select phone numbers for audio conferencing.

1. Select Bridge
2. Select Phone Numbers

Click **Save** when done.

Adding Phone Numbers

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

Navigation: Home » Service Director » Microsoft CSP » Accounts

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

1. **Phone Number:** It shows phone number that are added.
2. **Assigned to:** It shows user/resource to which phone number is assigned.
3. **Options:** It shows option to remove number.

To add a new number click **Add Phone Number**, provide **phone number** and click **Save**.

Service Phone Numbers

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



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

1. **Phone Number:** It shows phone number that are added.
2. **Assigned to:** It shows user/resource to which phone number is assigned.
3. **Options:** It shows option to remove number.

To add a new number click **Add Phone Number**, provide **phone number** and click **Save**.

Viewing Dial Plans (Direct Routing)

You can view & manage Dial Plans under Direct routing of CSP tenant. Navigate to following path:



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** 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 Team

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

Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of a CSP Tenant. Now select **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:

Navigation: Home » Service Director » Microsoft CSP » Accounts

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

Bulk Import Teams

Click **Import** to bulk import teams.

Select Excel file to import: Select File

There are two options to Import:

1. Create New
2. Create new an update existing

Click **Import Teams** when done.

Viewing Channels (Teams)

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

 Navigation: Home » Service Director » Microsoft CSP » Accounts

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

You can [add new channel](#), **Sync All Teams** and perform [bulk Import](#), Export channels.

Adding Channels (Teams)

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



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

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

1. **Team:** Select existing team from drop down list.
2. **Name:** Provide friendly name of channel.
3. **Description:** Provide description.
4. **Type:** Select type a). Public or b). Private

Click **Save** when done.

Bulk Import Channels (Team)

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

 Navigation: Home » Service Director » Microsoft CSP » Accounts

Click on **Manage** in front of a CSP Tenant. Now select **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:

Navigation: Home » Service Director » Microsoft CSP » Accounts

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

Set user passwords to never expire: Check box

Click **Save** when done.

CSP Usage Report

To view CSP usage report, navigate to the path below:

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

You can export Usage Reports to Excel by clicking **Export to Excel** button.

Under tab **Microsoft CSP Usage Report**, you can view following:

Customer Name, Company Name, Tenant Name, Active users, Deleted users, Total Users, Domains, User Mailboxes, Shared Mailboxes, Room Mailboxes, Equipment Mailboxes, Skype4B Users, Distribution Groups, Dynamic Distribution Groups, Mail Enabled Security Groups, Simple Security Groups, Microsoft CSP Groups, Mail Contacts, Date Created, Last synced at.

Under tab **O365 Subscription Usage Report**, you can view following:

Customer, Customer number, Company Name, Tenant Name, Linked With Local Org, Subscription Name, Offer Name, Microsoft Offer Id, Is AddOn, Quantity, Status, Category Name, Package Name, Profile Name, Setup date, End Date, Suspend Date.

Under tab **Detailed Usage Report**, you can view following:

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

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

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

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

Microsoft CSP Plan Management

CSP plans are created through powerful Service Plan Wizard. Microsoft CSP Plan supports wide variety of Offers/Add-ons. It includes following:

1. Enterprise
2. Government
3. Small Business
4. Trial

To create a CSP plan navigate to following path:



You will see following tabs under which you can create respective products for reseller and customer and Addons.

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

Note: You can **Import** and **Export** CSP offers. To view offers on an existing CSP Product click **Show Offers** from Options column. You can also edit existing CSP plans by clicking on the **Edit**.

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

1. **Product Type:** Select **Microsoft CSP Services** from the drop-down list.
2. **Product Name:** Enter the name of your product.
3. **O365 Partner Profile:** Select O365 Partner profile.
4. **Country:** Select country.
5. **Locale:** Select Locale.
6. **Is Active:** Select No if you want to disable this product selling.
7. **Defer new subscription and change quantity bill till next invoice:** Check box
8. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
9. **Associate Addon:** You may want to associate add-on with this product. Your choices are:
 - a. Optional
 - b. Required
 - c. Suppressed
10. **Associate Domain:** Select how you want to associate domains with this product. Your choices are:
 - a. Required
11. **Edu-Discount Package:** Check this option to enable.
12. **Date:** This is date set by the system (not editable).
13. **Sync sold plan resources:** Check this option in order to Sync resources to sold existing subscriptions associated with the package. **Note:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings. Skype4B plan or addon is not updated if it is assigned to user already.
14. **Product Comments:** Enter any comments you want to associate with this product. These comments show up on the store-front when this product is selected.

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

Resources: In step-2 you will set the resources for the plan.

1. **Linked with local organization:** Check this option if you want to link.
2. **Number of Domains allowed:** Provider total number of domains .
3. **Number of Users allowed:** Provide total number of users.
4. **Handle DNS:** Check this option if you want to handle DNS.
 - a. Select DNS server
 - b. Select DNS template.
5. **Manage Tenant Using Panel:** If tenant admin credentials provided and tenant management is enabled then Management of tenant will be allowed.

Offers: In step-3 click **Sync Offers/Addons from O365**. You can select different offers/Addons after clicking on plus(+) to expand as below:

1. Enterprise
2. Government
3. Small Business.
4. Trial

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

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

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

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

1. Setup Price
2. Price
3. Discount

Enter prices in each box.

CSP Commercial SaaS Products Here you can see CSP Commercial SaaS Products which are exported for the respective Product prices.

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

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

Group Action for CSP

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



CSP Group Actions can be searched by Customer ID, 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. **Customer:** It displays the customer name.
8. **Added by:** It displays who (provider, employee, customer etc.) added the Job.
9. **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. Company Name (Owner)
2. Customer ID
3. Tenant Name
4. 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. Company Name (Owner)
2. Customer
3. Company Name
4. Tenant
5. Domain
6. License

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

1. **Customer:** It displays customer name along with ID.
2. **Company Name:** It displays company name.
3. **Owner:** It displays owner.
4. **Tenant:** It displays tenant name, domain name.
5. **License:** It displays license in use.
6. **Active Units:** It displays active units.
7. **Consumed Units:** It displays consumed units.
8. **Locked Out Units:** It displays locked out units.
9. **Suspended Units:** It displays suspended units.
10. **Warning Units:** It displays warning units.

Tenant Price Report

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

 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 Work Folders Hosting fully automates and controls service delivery for "Windows Server 2016".

Work Folders Hosting is a solution to file syncing and collaboration problems and secure all users data on file servers synced on all devices, stored on-premise at your own file infrastructure of the organization. The files are accessed based on users roles. This adds for security and also Integrity of files data stored on the server.

Note: Please make sure you have subscribed to Orchestration Module for Windows Work Folders to avail this service otherwise you won't be able to utilize this feature. If you have any questions or want to avail this feature, please contact your service provider.

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. **Customer:** It displays the customer id along with customer name.
6. **Owner:** It displays the owner name.
7. **Work Folders:** It shows the number of work folders added.
8. **Options:** Click on **Manage** to [manage work folders](#) account.

Work Folders Service Management

To manage work folders accounts navigate to following path:

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

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

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

You will be able to view details of the subscription 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. **Account Notes:** These are notes/service messages by Control Panel or any notes added by the service provider for tagging

Resources tab shows below mentioned sections:

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

Add-ons tab shows the record for the total no of add-ons created on the subscription. 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. You will be on following navigation path:

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

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 Groups

To view and add Security Groups 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 » Customer Manager » Subscription List » Subscription Detail

Select **Organization** tab and then select **Security Groups** tab. It display following in the listing:

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

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

1. **Display name:** Provide SG display name.
2. **Group Scope:** It shows following option: Domain Local, Global, Universal
3. **Group Members:** Add users in group as members.
4. **Automatically add users in group:** Check this box to automatically add new users in SG.

Click **Save** when done.

Viewing Users

To view AD users in work folder organization navigate to the following path:

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

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

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

Select **Organization** tab and then select **Users** tab.

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. **Customer:** It is name of the customer.
 - v. **Logon Hours Template:** It shows if logon hour template is assigned.
4. **Options:** It shows following option for AD user
 - i. Edit
 - ii. Clone
 - iii. Change Password
 - iv. Unlock
 - v. Disable
 - vi. Remove

Adding User

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 » Customer Manager » Subscription List » Subscription Detail

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 » Customer Manager » Subscription List » Subscription Detail

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

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

Click **Save** when done.

Group Actions

To view group actions performed on Users and Security Groups navigate to following path:

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

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

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

Select **Organization** tab and then select **Group Actions** tab. You can **Search** group actions by providing following:

1. Parameter
2. Select Action type
3. Select Status

Click **Reset Tries Count** to automate provisioning process once the tries count reached '10'. You can also **Clear Completed/Cancelled Jobs**. It displays the following listings:

1. **Status:** It is the status of the group action i.e. completed, pending, cancelled or failed.
2. **Command:** It is the command on which group action is to be performed.
3. **Date Entered:** It displays the date.
4. **Tries:** It shows the number of entered tries.
5. **Last Tried:** It displays the last try.
6. **Customer ID:** It is the customer id.
7. **Customer Name:** It is the customer name.
8. **Owner:** It is the owner of the exchange.
9. **Added by:** It displays the name of the employee.
10. **Option:** It shows the option to **RUN** and **Cancel** the action.

Add New Work Folder

To add work folder navigate to the following path:

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

Click **Manage** in front of a work folders account in options column. You will be on following navigation path:

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

Select **Work Folders** tab. It shows following in the listing:

1. **Sync Share Name:** It shows file share name
2. **Details:** It displays following detail:
 - i. Server FQDN
 - ii. Path
 - iii. Status
 - iv. Allocated Storage
 - v. Last synced at
3. **Options:** It shows option to Edit, disable and Delete Work folders.

To add a new work folder click **Add New Work Folder**. You can also **Sync all Work Folders Used Storage**.

1. **Storage Status:** It shows storage status
2. **Sync Share Name:** Provide sync share name
3. **Select Quota Template:** Select template for file share
4. **Specify custom size:** Specify Custom size
5. **User Folder Structure:** Choose a folder-naming format based on whether you have to maintain user folder compatibility or want to support identical aliases across domains.
 - a. **User alias:** Maintains compatibility with existing user folders that use aliases for their names.
 - b. **User alias@domain:** Eliminates conflicts between identical user aliases in different domains.
6. **Max. File Upload Size:** Select maximum upload size
7. **Description:** Provide description
8. **Sync Access:** Select from Selectable to selected.
9. **Device Policies:** Select Encrypt Work folders or Automatically Lock Screen and require password

Click **Save** when done.

Add New File Share

To add file share navigate to the following path:

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

Click **Manage** in front of a work folders account in options column. You will be on following navigation path:

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

Select **File Share** tab. It shows following in the listing:

1. **File Share Name:** It shows file share name
2. **Details:** It displays following detail:
 - i. Path
 - ii. Allocated Storage
 - iii. Current Storage Used
 - iv. Quota Template Name
 - v. Last synced at
3. **Options:** It shows option to Edit and Remove file share.

To add a new file share click **Add New file Share**. You can also **Sync all File Share Used Storage**.

1. **Storage Status:** It shows storage status
2. **File Share Name:** Provide file share name and select following:
 - i. Enable access-based enumeration
 - ii. Allow caching of shares
 - iii. Encrypt data access.
3. **Select Quota Template:** Select template for file share
4. **Specify custom size:** Specify Custom size
5. **Sync Access:** Select from Selectable to selected.

Click **Save** when done.

Work Folder Hosting Plan Management

Work Folders Hosting plans are created through powerful Service Plan Wizard. It includes following:

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

To create a work folders plan navigate to following path:



Note: You can also edit existing work folders plans by clicking on the **Edit**.

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

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

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

Resources: In step-2 you will set the work folders resources for the plan. Provide **Total Storage Quota in GB(s)**

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

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

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

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

- a. Setup Price
- b. Price
- c. Discount

Enter prices in each box.

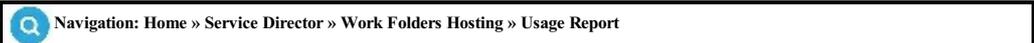
Possible Product Upgrade / Downgrade: Here you can configure the upgrade and downgrade behavior of this product. When a product is purchased, your client may perform upgrade/downgrade from their control center without your involvement.

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

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

Usage Report

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

 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. Customer Name
3. Organization Name
4. Company Name
5. Display Name
6. Work Folder Path
7. Select Quota Template
8. Select Server
9. Select **Status**

Click **Search**

Orchestration Module for RDS Hosting

Control Panel allows Remote Desktop Service through its Orchestration Module for RDS. Control Panel Orchestration Module for RDS is designed for all resellers wanting to start or grow their RDS Hosting business.

Control Panel Orchestration Module for Remote Desktop Service (RDS) fully automates and controls service delivery for **Microsoft Remote Desktop Service**, manages billing and provides self service control panel to your customer.

Note: Please make sure you have subscribed to Orchestration Module for RDS Hosting to avail this service otherwise you won't be able to utilize this feature. If you have any questions or want to avail this feature, please contact your service provider.

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. **Customer:** It shows the customer ID and name.
6. **Options:** Click on **Manage** from option to [manage services for RDS](#) accounts.

RDS Service Management

To manage RDS accounts 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 » Customer Manager » Subscription List » Subscription Detail

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 the following path:

 Navigation: Home » Service Director » RDS Hosting » Accounts

Click **Manage** in front of a RDS account in options column. You will be on following navigation path:

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

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

Organization tab: It shows the RDS organization detail.

1. **Organization Name:** It shows the name of organization.
2. **Organization Internal name:** It shows the internal name of organization.
3. **Details:** It shows following under details:
 - i. **Active Directory Domain:** It shows the active directory domain.
 - ii. **ADSync Enabled:** It shows Yes or No.
 - iii. **ADSync Template:** If ADsync is enable it shows template name.
 - iv. **Subscriptions:** It shows the subscription id name.

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

Users tab: It shows the Active directory [users](#) added.

Group Actions tab: It shows the [group actions](#) performed on users and security groups.

Add Security Group

To view and add Security Groups for RDS organization navigate to the following path:

 Navigation: Home » Service Director » RDS Hosting » Accounts

Click **Manage** in front of a RDS account in options column.

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

Select **Organization** tab and then select **Security Groups** tab. It display following in the listing:

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

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

1. **Display name:** Provide SG display name.
2. **Group Scope:** It shows following option: Domain Local, Global, Universal
3. **Group Members:** Add users in group as members.
4. **Automatically add users in group:** Check this box to automatically add new users in SG.

Click **Save** when done.

Viewing Users (RDS)

To view AD users in RDS organization navigate to the following path:

 Navigation: Home » Service Director » RDS Hosting » Accounts

Click **Manage** in front of a RDS account in options column.

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

Select **RDS Organization** tab and then select **Users** tab.

To search **Users**, provide search fields as per requirement, then click on **Search** button. You can [Add User](#), Add Bulk User, [Update Bulk Users](#).

It displays the following in listings:

1. **Status:** It shows the status of user.
2. **User:** It shows the logon name.
3. **Details:** It shows the details of user as below:
 - i. **Logon Name:** It shows logon name.
 - ii. **Organization Name:** It displays Organization name.
 - iii. **Active Directory Domain:** It is active directory domain name.
 - iv. **Customer:** It is name of the customer.
 - v. **Logon Hours Template:** It shows if logon hour template is assigned.
4. **Options:** It shows following option for AD user
 - i. Edit
 - ii. Clone
 - iii. Change Password
 - iv. Disable
 - v. Unlock
 - vi. Remove

Adding User

To add AD users in RDS organization navigate to the following path:

 Navigation: Home » Service Director » RDS Hosting » Accounts

Click **Manage** in front of a RDS account in options column.

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

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 navigate to following path:

 Navigation: Home » Service Director » RDS Hosting » Accounts

Click **Manage** in front of a RDS account in options column.

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

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:

Navigation: Home » Service Director » RDS Hosting » Accounts

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

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

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. You will be on following navigation path:

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

Select **Policies** tab. It shows following in the listing:

1. **Name:** It displays the name of policy.
2. **Description:** It displays the description.
3. **Options:** It shows option to **Edit** and **Remove** the policy.

To add a new policy click **Add Policy** button and provide following:

1. **Name:** Provide friendly name.
2. **Description:** Provide description.
3. **Users and Groups:** Select users and security groups from selectable to selected.
4. **Session Collections:** Select sessions collections.
5. **Virtual Desktop Collections Pooled:** Select virtual desktop collections pooled.
6. **Virtual Desktop Collections Personal:** Select virtual desktop collections personal.
7. **TS Gateway Policies:** Select TS gateway policies.
8. **Published Apps:** Select published apps.

Click **Save** when done.

User Settings

To view and add user settings for RDS navigate to following path:



Click **Manage** in front of a RDS account in options column. You will be on following navigation path:



Select **User Settings** tab. It shows following in the listing:

1. **Name:** It displays the name of policy.
2. **Description:** It displays the description.
3. **Options:** It shows option to **Edit** and **Remove** the policy.

Click **Add Users Settings** to add new user settings for RDS and provide following:

1. **Name:** Provide name of a user setting.
2. **Description:** Provide description.
3. **Profile:** There is User Profile and Home folder.
 - a. **User Profile:** For User Profile provide
 - i. **Profile path:** Provide profile path.
 - ii. **Logon script:** Provide logon script.
 - b. **Home Folder:** Provide following for home folder:
 - i. **Local Path:** Provide local path.
 - ii. **Connect:** Select Drive **To:** provide To
4. **Environment:** There is starting program and client devices.
 - a. **Starting Program**
 - i. **Program file name:** Provide program file name.
 - ii. **Start in:** Provide start in.
 - b. **Client Devices**
 - i. Connect client devices at logon
 - ii. Connect client printers at logon
 - iii. Default to main client printer
5. **Remote Desktop Services User Profile**
 - a. **User Profile:** Provide user profile.
 - b. **Remote Desktop Services Home Folder:** For Home folder provide:
 - i. **Local Path:** Provide local path.
 - ii. **Connect:** Select Drive **To:** provide To
 - iii. Deny this user permissions to log on to Remote Desktop Session Host server: Check this option.
6. **Applies To:** Select users and security groups.

Click **Save** when done.

RDS Hosting Plan Management

Orchestration Module for RDS allows you to add hosting products for your customers. It includes following:

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

To view/manage RDS products navigate to the following path:



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

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

1. **Product Type: RDS Hosing** from the drop-down list is selected.
2. **Product Name:** Enter the name of your product.
3. **Provider:** Select **RDS** as a provider.
4. **Server Group:** Select the desired server group from the drop down list.
5. **Is Active:** Select No if you want to disable this product selling.
6. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
7. **Associate Addon:** You may want to associate add-on with this product. Your choices are:
 - a. Optional
 - b. Required
 - c. Suppressed
8. **Sync sold plan resources:** Check this option in order to Sync resources to sold existing subscriptions associated with the package. **Note:** If this checkbox is checked, product name, comments, Edu discount bit, plan resources will be updated in sold subscription resources. Changing plan resources does not auto update entities like Mailbox or Skype4B User settings. Skype4B plan or addon is not updated if it is assigned to user already.
9. **Product Comments:** Enter any comments you to associate with this product. These comments show up on the store-front when this product is selected.

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

1. Session Collections
2. Virtual Desktop Collections Pooled
3. Virtual Desktop Collections Personal
4. TS Gateway Policies
5. Published Apps

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

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

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

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

1. Setup Price
2. Price
3. Discount

Enter prices in each box.

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

Associate Addon: This form lets you associate addon with your hosting plan. Your client may buy these addon using

online store or order them through their customer control center.

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

SSL Accounts

To view SSL accounts in control panel, navigate to the following path:

 Navigation: Home » System Configuration » SSL Accounts

You can search and Manage SSL accounts.

To view DigiCert certificates select **DigiCerts Certificates** tab.

Hosting Plans Management Overview

Control Panel offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you may easily create hosting plans and sell them via Offline order form or integrated store-front.

Following service plans are available in the Control Panel:

1. [Domain Name Plan Management](#)
2. [Shared Hosting Plan Management](#)
3. [Exchange Hosting Plan Management](#)
4. [Hosted SharePoint Plan Management](#)
5. [Hosted Skype4B Plan Management](#)
6. [Hosted CRM Plan Management](#)
7. [Miscellaneous Plan Management](#)
8. [Hosted VPS \(Hyper-V\) Plan Management](#)
9. [Microsoft CSP Plan Management](#)
10. [Active Directory Plan Management](#)
11. [Work Folder Hosting Plan Management](#)
12. [RDS Hosting Plan Management](#)
13. [DigiCert SSL Plan Management](#)
14. Add-ons Management

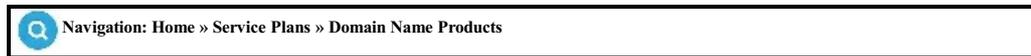
Domain Name Plan Management

Control Panel Supports automated domain registration, renewal and transfers with supported domain providers. Currently following domain providers are supported:

1. DirectI(Logic Boxes)
2. DK Hostmaster Registry
3. Enom
4. GoDaddy
5. Offline Domain Registrar
6. Open SRS
7. Registry.be
8. RRPproxy
9. RRPproxy EPP
10. SIDN EPP
11. StarGate
12. TransIP

You can add as many TLDs (Top Level Domains) to the system as you need. You assign TLDs to appropriate domain registration supported by the system.

To create TLD navigate to following path:



Here you will see list of TLDs created in the system. Here you can disable TLD or set pricing instantly.

Note: To edit existing TLDs click on **Edit** and follow the instructions on screen.

To create TLDs

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

1. **Extension:** Enter TLD name here. For example. for .COM TLD you will enter "COM" in this box.
2. **Registrar:** Select the Registrar provider who handles this TLD. You may activate registrar providers from *System Configuration » Providers » Domain Registrars*.
3. **Active:** Uncheck if you want to disable this product selling.
4. **Is Transferable:** If this is checked then customer can place transfer orders for this TLD on store front.
5. **Minimum Term:** This is minimum period this TLD can be registered for. Example, .uk minimum period is 2 years.
6. **Remote Lock:** Check this option if registrar locking for TLD is supported.

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

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

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

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

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

- a. Setup Price
- b. Price
- c. Discount
- d. Renewal Price
- e. Transfer Price

Enter prices in each box.

Associate Addon: This form lets you associate addon with your domain name. Your customer may buy these addon

using online store or order them through their customer control center.

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

Shared Hosting Plan Overview

Control Panel Supports shared hosting plans provisioning on supported providers. Currently following provider is supported:

1. Hostmatic Control Server
2. Plesk Server

Hosting Plans are created through powerful Service Plan Wizard. To create a hosting plan, navigate to following path:

Navigation: [Home](#) » [Service Plans](#) » [Hosting Products](#)

There are separate tabs for customer product listing and add-ons management.

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

The list of Web Hosting plans displays the following:

1. **Status:** If plan is available for sale the status will be *Active*.
2. **ID:** It is the product ID.
3. **Products Name:** This is the WebHosting package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
 - i. **Clone:** To clone a product select clone from options.
 - ii. **Edit:** Click to edit.
 - iii. **Deactivate:** You can also deactivate a product.
 - iv. **Remove:** To remove a product select remove option.

Hosted Email Plans Overview

Orchestration Module for MS Exchange offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you may easily create hosted email plans and sell them via Offline order form or integrated store-front.

To view the hosted email plans:



There are separate tabs for customer product listing and add-ons management.

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

The list of hosted email plans displays the following:

1. **Status:** If plan is available for sale the status will be *Active*.
2. **ID:** It is the product ID.
3. **Products Name:** This is the hosted Exchange package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
 - i. **Clone:** To clone a product select clone from options.
 - ii. **Edit:** Click to edit.
 - iii. **Deactivate:** You can also deactivate a product.
 - iv. **Remove:** To remove a product select remove option.

Exchange Addon Management

Control Panel allows you to extend your service plan offerings and accommodate additional features as and when available through the use of **Addons**. An addon enhances the capability of already created base plan through increase of features. Control Panel offers array of options to manage addons. For this, let us explain the working of base plan and addons. For instance, if you create a base plan with following resources.

- Exchange Organizations = 2
- Mailboxes per organization = 3

It means you can create total 6 mailboxes, i.e. 3 mailboxes in each Exchange Organization.

For addons there are two different scenarios:

Scenario 1: Add-on with Zero Exchange Organization

Let's say if you create an addon with following resources:

- Exchange Organizations = 0
- Mailboxes per organization = 1

It means you can create this additional mailbox in any already existing organization.

Also if you create an addon with following resources:

- Exchange Organizations = 0
- Mailboxes per organization = 5

This way these 5 mailboxes can be created in any of the existing organizations. For example, if you have two organizations then you can distribute these 5 mailboxes between these 2 organizations.

Scenario 2: Add-on with Exchange Organization greater than Zero

Let's say if you create an addon with following resources:

- Exchange Organizations = 1
- Mailboxes per organization = 2

It means that the mailboxes are only for additional exchange organization. You first need to create a separate Exchange Organization and then you can create mailboxes in this organization.

Resource Quota Bar

Also please note that in Mailboxes tab it only shows the resources of base plan and addon resources only appears once you created new additional mailbox. It shows like 1 + 2 Add-ons, means 1 mailbox of base plan and 2 addon mailboxes.

Hosted SharePoint Service Plans Overview

Orchestration Module for MS SharePoint offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you may easily create hosted SharePoint plans and sell them via Off-line order form or integrated store-front.

To view the hosted SharePoint plans:



There are separate tabs for customer product listing and add-ons management.

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

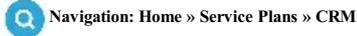
To add a new Product Click **Add New Product** button. The list of hosted SharePoint plans displays the following:

1. **Status:** If plan is available for sale the status will be **Active**.
2. **ID:** It is the product ID.
3. **Products Name:** This is the hosted SharePoint package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
 - i. **Clone:** To clone a product select clone from options.
 - ii. **Edit:** Click to edit.
 - iii. **Deactivate:** You can also deactivate a product.
 - iv. **Remove:** To remove a product select remove option.

Hosted CRM Service Plans Overview

Orchestration Module for Microsoft CRM offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you may easily create hosted CRM plans and sell them via Off-line order form or integrated store-front.

To view the hosted CRM plans:

 Navigation: Home » Service Plans » CRM

There are separate tabs for customer product listing and add-ons management.

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

The list of hosted CRM plans displays the following:

1. **Status:** If plan is available for sale the status will be **Active**.
2. **ID:** It is the product ID.
3. **Products Name:** This is the hosted CRM package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
 - i. **Clone:** To clone a product select clone from options.
 - ii. **Edit:** Click to edit.
 - iii. **Deactivate:** You can also deactivate a product.
 - iv. **Remove:** To remove a product select remove option.

Hosted Skype4B Plans Overview

Orchestration Module for Microsoft Skype4B offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you may easily create hosted Skype4B plans and sell them via Offline order form or integrated store-front.

To view the hosted Skype4B plans:

Navigation: [Home](#) » [Service Plans](#) » [Skype4B](#)

There are separate tabs for customer product listing and add-ons management.

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

The list of hosted Skype for Business plan displays the following:

1. **Status:** If plan is available for sale the status will be **Active**.
2. **ID:** It is the product ID.
3. **Products Name:** This is the hosted Skype4B package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
 - i. **Clone:** To clone a product select clone from options.
 - ii. **Edit:** Click to edit.
 - iii. **Deactivate:** You can also deactivate a product.
 - iv. **Remove:** To remove a product select remove option.

Microsoft CSP Plan Overview

Orchestration Module for Microsoft CSP offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you can easily create hosted email plans and sell them via Offline order form or integrated store-front.

To view the Microsoft CSP plans:

Navigation: [Home](#) » [Service Plans](#) » [Microsoft CSP](#)

There are separate tabs for customer product listing and add-ons management.

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

You can also **Export** and **Import** CSP packages Offers prices. Select **CSV file** to import offers prices. Click **Update Prices** when done.

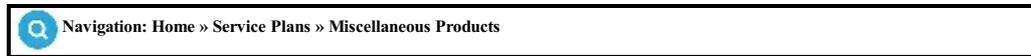
The list of Microsoft CSP plans displays the following:

1. **Status:** If plan is available for sale the status will be *Active*.
2. **ID:** It is the product ID.
3. **Products Name:** This is the Microsoft CSP package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
 - i. **Clone:** To clone a product select clone from options.
 - ii. **Edit:** Click to edit.
 - iii. **Deactivate:** You can also deactivate a product.
 - iv. **Show Offers:** It shows the offer a particular plan has.
 - v. **Remove:** To remove a product select remove option.

Miscellaneous Products

Miscellaneous Product support feature allows you to add non hosting product which you only want to track for billing purposes. It can be any service or product which your company is offering to its clients. You will be able to take orders and do billing, provisioning would be manual.

To view/manage miscellaneous products, navigate to:



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

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

1. **Product Type:** Misc. Product from the drop-down list is selected.
2. **Product Name:** Enter the name of your product.
3. **Is Active:** Select No if you want to disable this product selling.
4. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
5. **Associate Addon:** You may want to associate addon with this product. Your choices are:
 - a. Optional
 - b. Required
 - c. Suppressed
6. **Associate Domain:** Select how you want to associate domains with this product.
 - a. Optional
 - b. Required
 - c. Suppressed
7. **Process this product automatically:** If checked, the misc product will be run automatically and you will not have to Run manually from Service Queue. Recommended for product that does not involve any manual setup.
8. **Product Comments:** Enter any comments you to associate with this product. These comments show up on the store-front when this product is selected.

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

On step-2 you will set the following:

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

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

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

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

- a. Setup Price
- b. Price
- c. Discount

Enter prices in each box.

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

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

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

Hosted Hyper-V Plans Overview

Orchestration Module for Microsoft Hyper-V offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you can easily create hosted email plans and sell them via Offline order form or integrated store-front.

To view the Virtual Machines hosting plans:

 Navigation: [Home](#) » [Service Plans](#) » [Virtual Machines Hosting](#)

There are separate tabs for customer product listing and add-ons management.

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

The list of VPS Hosting plan displays the following:

1. **Status:** If plan is available for sale the status will be **Active**.
2. **ID:** It is the product ID.
3. **Products Name:** This is the hosted VPS package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
 - i. **Clone:** To clone a product select clone from options.
 - ii. **Edit:** Click to edit.
 - iii. **Deactivate:** You can also deactivate a product.
 - iv. **Remove:** To remove a product select remove option.

Active Directory Plan Overview

Active Directory Module offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you can easily create hosted email plans and sell them via Offline order form or integrated store-front.

To view the Active Directory plans:

 Navigation: [Home](#) » [Service Plans](#) » [Active Directory](#)

There are separate tabs for customer product listing and add-ons management.

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

The list of active directory plans displays the following:

1. **Status:** If plan is available for sale the status will be *Active*.
2. **ID:** It is the product ID.
3. **Products Name:** This is the Active Directory package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
 - i. **Clone:** To clone a product select clone from options.
 - ii. **Edit:** Click to edit.
 - iii. **Deactivate:** You can also deactivate a product.
 - iv. **Remove:** To remove a product select remove option.

DigiCert SSL Plan Management

DigiCert SSL Plans are created through powerful Service Plan Wizard. To create a DigiCert SSL plan navigate to following path:



Note: You can also edit existing SSL plans by clicking the **Edit** at desired plan that you want to modify.

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

1. **SSL Provider:** Select **DigiCert** from the drop-down list.
2. **Product Name:** Enter the name of your product.
3. **Is Active:** Select No if you want to disable this product selling.
4. **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
5. **Product Comments:** Enter any comments you want to associate with this product. These comments show up on the store-front when this product is selected.

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

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

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

- a. Setup Price
- b. Price
- c. Discount

Enter prices in each box.

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

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

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

Work Folder Hosting Plan Overview

Orchestration Module for Windows Work Folders offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you can easily create hosted Work Folders and sell them via Offline order form or integrated storefront.

To view the work folder hosting plans:

Navigation: [Home](#) » [Service Plans](#) » [Work Folder Hosting](#)

There are separate tabs for customer product listing and add-ons management.

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

The list of work folder hosting plans displays the following:

1. **Status:** If plan is available for sale the status will be **Active**.
2. **ID:** It is the product ID.
3. **Products Name:** This is the work folder hosting package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
 - i. **Clone:** To clone a product select clone from options.
 - ii. **Edit:** Click to edit.
 - iii. **Deactivate:** You can also deactivate a product.
 - iv. **Remove:** To remove a product select remove option.

RDS Hosting Plan Overview

Orchestration Module for RDS hosting offers extremely powerful and flexible hosting plan wizard. Using Service Plan Wizard you can easily create hosted remote desktop services 2016 (RDS) plans and sell them via Offline order form or integrated store-front.

To view RDS hosting plans:



There are separate tabs for customer product listing and add-ons management.

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

The list of RDS hosting plans displays the following:

1. **Status:** If plan is available for sale the status will be **Active**.
2. **ID:** It is the product ID.
3. **Products Name:** This is the RDS hosting package name.
4. **Total Sold:** It displays the total no of sold products.
5. **Date Created:** It displays the date on which the plan was created.
6. **Products Type:** Indicates the provider for the service plan.
7. **Options:** There are following options:
 - i. **Clone:** To clone a product select clone from options.
 - ii. **Edit:** Click to edit.
 - iii. **Deactivate:** You can also deactivate a product.
 - iv. **Remove:** To remove a product select remove option.

Company Profile Settings

Company profile settings are used to all the documents where company information is displayed. For example, Invoice document, Payment document, customer control center etc.

To edit company profile settings navigate to the following path:

 Navigation: [Home](#) » [System Configuration](#) » [Company Profile](#)

There are five tabs for profile settings

1. [Company Profile](#)
2. [Culture](#)
3. [Personalization](#)
4. [API Settings](#)
5. [Module Configuration Options](#)
6. [Terms & Conditions](#)
7. [Skins](#)

Enter the necessary information in the fields and click the **Save** button.

Company Profile

To edit company profile settings navigate to the following path:



Navigation: Home » System Configuration » Company Profile

You can see the following fields under **Company Profile** tab:

1. **Company name:** Provide company name.
2. **URL:** Provide URL.
3. **Address:** Provide address.
4. **City:** Provide the name of city.
5. **State:** Provide the name of state.
6. **Zip:** Provide zip code.
7. **Country:** Provide country name.
8. **Phone:** Provide phone number.
9. **Billing phone:** Provide billing phone number.
10. **Sales phone:** Provide sales phone number.
11. **Support phone:** Provide support phone number.
12. **Billing Email:** Provide billing email.
13. **Sales Email:** Provide sales email.
14. **Support Email:** Provide support email.
15. **Billing Signature:** Provide billing signature.
16. **Sales Signature:** Provide sales signature.
17. **Support Signature:** Provide support signature.
18. **Append disclaimer in emails:** Selecting this option will append disclaimer in emails.
19. **Company's default mailbox template:** You can set default Mailbox template for a company.

Enter the necessary information in the fields and click on the **Save** button.

Culture

To edit company profile settings navigate to the following path:

 Navigation: Home » System Configuration » Company Profile

Select **Culture** tab:

- **Locale:** Select locale from the drop down list.

Only enabled languages can be set as default. It shows the following listing:

1. **Name:** It displays the name of the language.
2. **Available/Enabled:** It shows the enabled languages.
3. **Set As Default:** You can set the language as default.

Languages that can be set as default are English (United States), Spanish (Uruguay), Dutch, Portuguese, and German.

Personalization

To edit company profile settings navigate to the following path:



Select **Personalization** tab:

Personalization

1. **Control panel brand name:** Provide control panel brand name.
2. **Company name:** Provide company name.
3. **Company website URL:** Provide company website URL.
4. **Control panel logo:** You can either provide log URL or upload logo. Select logo of size. 400px x 45px
5. **Login Background Image:** You can either provide image URL or Upload image.
6. **Favicon: (16px x 16px):** You can either provide favicon URL or Upload favicon.
7. **Copyright text:** Provide copy right text and year.
8. **Url to purchase more resources when quota limit is reached:** You can provide URL to your store products/Add-on to buy more resources. See more at [Purchase more resources](#).
9. **Send email checkbox checked:** Select option to send email.
10. **Hide login as end user option from login page:** Select checkbox to hide option for end user (4rth level Active Directory user) to login to control panel.

Click **Save** when done.

API Settings

To edit company profile settings navigate to the following path:



Select **API Settings** tab, it shows the following fields under *API information* section:

1. **API Login:** Provide API login.
2. **API Password:** Provide API password.
3. **Allowed IP addresses:** Provide IP addresses in comma separated way. i.e:10.1.1.1, 10.1.1.2, 10.1.1.3]
4. **Status:** Select enabled or disabled from the drop down list.
5. **WHMCS Module:** Check this option for WHMCS.
6. **Encryption Key:** Generate Key. [Note:This key will be used to encrypt/decrypt data that is transmitted between panel and WHMCS via browser as hidden fields or in the url. This key shall be provided in WHMCS integration handler file]
7. **Security Code:** Generate code [Note:This security code will be used to validate the auto login authentication from WHMCS into Panel. This Code shall be provided in WHMCS integration handler file]

Click on **Save** button when done.

Module Configuration Options

To enable/disable help desk and billing module navigate to following path:

Navigation: Home » System Configuration » Company Profile

Select **Module Configuration Options** tab:

1. Help Desk Module
2. Billing Module.

Select above and click **Update configuration**.

Terms & Conditions

To change/update terms and conditions for company profile navigate to following path:



Navigation: Home » System Configuration » Company Profile

Select **Term & Conditions** tab:

1. You can **Set As Default** one Term & condition.
2. **Name:** Provide friendly name. Example: Support Policy
3. **Web URL:** Provide URL for terms. Example: <http://domain.com/terms.htm>
4. **Language:** Select language.

Click **Add More Terms** to add more.

Skins

To customize control panel skin navigate to following path:

 Navigation: Home » System Configuration » Company Profile

Select **Skins** tab. You can choose which skin is **Default** or **Is allowed**. Click **Save** when done.

Two Factor Authentication Settings

To enable two factor authentication (2FA) with in control panel, navigate to the following path:

Navigation: Home » System Configuration » Authentication

Select **Two Factor Authentication Settings** tab.

- **Enabled:** Select checkbox to enable 2FA. Once check you have other options to enable by default for all new customers and update existing users as below
 - i. Enabled by default for new customers
 - ii. Enabled by default for new staff users

For 2FA Settings Authenticate Using following:

- a. **Send PIN through Email:** Check box
- b. **Authenticator App:**

For **Update existing Users** you can select **No change**, **Enabled** and **Disabled** for following:

1. Staff Users
2. Customers
3. End (Active Directory) Users

Click **Save**.

Custom Dashboard Tiles

To add Dashboard tiles, navigate to the following path:

Navigation: Home » System Configuration » Custom Dashboard Tiles

Click **Add Custom Tile**.

1. **Name:** Provide name of tile.
2. **Icon Path:** Select Image URL or Upload Image
3. **URL:** Provide URL of custom tile.
4. **Show To Customer:** Check box
5. **Show To Staff:** Check box
6. **Show On 4th level:** Check box

Click **Save** when done.

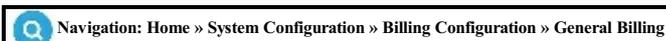
Billing Preferences

Billing preferences are set of configurations that are supposed to be setup according to the underlying business scenarios. As these settings totally depend on your business nature and customer relationship.

1. [General Billing](#)
2. [Invoice Settings](#)
3. [Payment Queue Settings](#)
4. [Advanced](#)
5. [Invoice Templates](#)
6. [Credit Card Types](#)
7. [CSP billing](#)

General Billing

Billing preferences involve various settings including invoice setting, and payment queue. To setup the billing configurations, navigate to the following path.

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

Click on the First tab, that is "**Billing Settings**" to configure billing settings. Here, you can **Enable/disable PCI compliance**, turn ON/OFF the billing system, Enable/Disable tax collection, the different document ID's to start from, Hide credit card interfaces and enable SEPA payment method etc.

1. **Day of month to bill:** Select the day of billing from the drop down list.
2. **Enable PCI Compliance:** Select this option to enable PCI compliance in control panel. If PCI Compliance enabled, credit card data will not be saved in local database, instead all payment profiles will be created on payment gateway.
3. **Disable prorate billing:** Prorated billing is a technique for applying standard billing methods to nonstandard billing periods. For example, if a bill for a service is usually invoiced monthly, prorating the bill allows the service provider to bill for an amount that reflects the portion of the month in which the service was used. Prorated billing can be applied to periods shorter or longer than the usual billing period. If you **disable prorated billing**, following will happen:
 - a. The add-ons purchased with a subscription will be prorated with that subscription and a single invoice will contain one subscription and its Add-ons. This will only apply to subscriptions and add-ons having same billing cycle (Weekly, Monthly, Yearly etc).
 - b. On the other hand, the subscriptions will be billed on the date it is purchased. Also, all the subscriptions purchased on the same day will be invoiced together.
4. **Disable price freeze:** You can disable price freeze option
5. **Set Pay later as default in offline order form:** You can set Pay later as default for billing in your offline order form.
6. **Disable tax collection:** You can disable tax option for your panel.
7. Issue tax return on credits generated by system:
8. **Balance sign meaning:**
 - i. Positive balance means the customer owes money to the provider: When this option is selected, the positive balances shown in statements are owed by customer.
 - a. Balance without brackets (customer owes money to provider)
 - b. Balance with brackets (provider owes money to customer)
 - ii. Negative balance means the customer owes money to the provider: When we select this option, the negative balances shown in statements are owed by customer.
 - a. Balance with brackets (customer owes money to provider)
 - b. Balance without brackets (provider owes money to customer)
9. **Next invoice ID:** You can provide next invoice ID.
10. **Next payment ID:** You can provide next payment ID.
11. **Next payment request ID:** you can provide next payment request ID.
12. **Hide Credit Card Interfaces:** You can select this option to hide credit card interfaces from customer panel.
13. **Default Payment Group:** Select default payment group for your control panel.
14. **Add next billing month in pro-rate bill when bill days are less than 15 days:** Check box.

Invoice Settings

Click on Second tab, that is "**Invoice Settings**" to configure invoice setting. Here, you can setup when to generate invoice and when to email it to the client and other settings.

Reset Invoices: Provider/Reseller can reset invoices for their company. Select **Invoice Settings** tab, click on "**Reset Invoices**" button. This interface will delete all old invoices and payments and cancelled subscriptions/add-ons from the database and generates new invoices for selected payment group, from Next Renewal Date of the subscriptions/add-ons by picking prices etc. data from associated service plans.

Before running this operation, service queue should be empty for selected company. For each subscription this will generate single setup invoice with sum total of the associated add-ons with subscription.

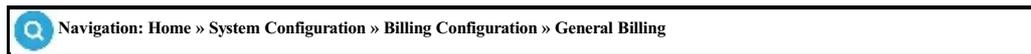
Payment Queue Settings

Click on Third tab, that is "**Payment Queue Settings**" to configure payment/credit card settings. Here, you can specify either to **Charge** or **Authenticate** the credit card, when to charge or how many time make an attempt to charge a credit card and similar other settings.

Charge: By selecting this option the payment is automatically paid and its status will be changed to complete. For viewing, please navigate to:

 Navigation: Home » Billing Manager » Documents » Payments

Authenticate Only: When we select Authenticate only mode then payments will show in waiting capture tab.

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

Click on the Third tab, that is Payment Queue Settings & select Authenticate Only.

Waiting Capture: When you select this option, the payments are placed in pending for transaction tab in online payment section.

For viewing, please navigate to:

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

Automatically process orders selected to be paid offline: By enabling this option the services will automatically be provisioned from service queue.

By disabling this option the services will not automatically provisioned from service queue. You have to provision it manually by clicking **Run** in the **Service Queue**.

Advanced

Under **Advanced** tab you can enable/disable the option to Allow Payment by Draft and Allow Payment by Cheque.

Invoice Templates

Select Language and customize the invoice template as per requirement.

Credit Card Types

Under **Credit Card Types** tab you can enable/disable Credit Cards.

1. Visa
2. MasterCard
3. American Express
4. Diners Club
5. JCB
6. Maestro
7. Discover

CSP Billing

Give credit on O365/CSP Subscription Suspend/Upgrade/Quantity Decrease: Tick means Yes.

Note: This does not applies to:

1. Usage based reseller subscription.
2. Customer subscriptions which have Defer bill option enabled.

Invoice due period: Select day for invoice due period.

Click **Save** when done.

Tax Zones

It is a common practice to pay government tax and good businesses do take care of these business ethics by collecting and paying the taxes. Control Panel facilitates you to induce this functionality into your business model with quite ease and that is seamlessly managed within your defined billing system at this platform.

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

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

Tax Reports

To view report generated by the system regarding tax detail navigate to the following path:

 Navigation: Home » System Configurations » Billing Configurations » Taxation » Tax Reports

Adding Tax Zone

To add a new tax zone, click on the **Add Tax Zone** button and it will take you to the following interface, provide the relevant information and set the status of the zone and then click on **Save**.

Enable/Disable Tax Collection

You can Enable/Disable tax collection in **Billing Preferences** by navigating to the following path:

 Navigation: Home » System Configurations » Billing Configurations » General Billing

Avalara AvaTax

In control panel as third party **Avalara** solution for sales automation and tax compliance is included to bring value to your business. When you want to use AvaTAX to calculate tax you have to provide below settings:

1. **Account ID:** Provide account ID.
2. **License Key:** Provide license key
3. **API Url:** Provide API URL.
4. **LIVE URL:** Provide live URL for e.g. <https://rest.avatax.com>
5. **Select Locale:** Select locale.

Tax Report

To view tax report navigate to the following path.

Navigation: Home » System Configuration » Billing Configuration » Taxation » Tax Report

It shows the following listing:

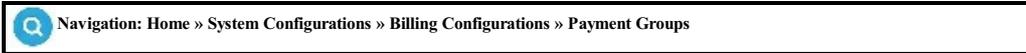
1. **Country:** Select the country from the drop down list.
2. **State/Province:** Select the state/province.
3. **Currency:** Select the currency.
4. **Date after:** Choose the after date from the calendar.
5. **Date before:** Choose the before date from the calendar.

Then, click on the **Generate** button to view the tax report.

Currencies

Currency is one of the primary means of any business, it could be different from country to country or from one geographical location to another, depending upon demographical factors. Thus, Control Panel has the flexibility to get adapted for varying different currencies according to your business requirement.

To setup currencies suitably and to configure them with payment gateways navigate to the following path:



Add Payment Group

Adding a new payment group facilitate you to add new currency in the case if there is no default currency exists or you need to configure it as per your requirements.

Note: You can also edit existing payment group by clicking on the **Edit**.

Click on the **Add Payment Group** button and it will take you to the following interface where you can setup Payment Group according to your needs and suitability.

Fill in the information and the fields which are marked with (*) are mandatory. Click on Next to complete the setup.

Note: The Currency field can NOT be changed while other fields can be edited later on.

Anti-Fraud Plug-ins

In any online business scenario, the safety and security of each transaction or any operation is the key to success. Your business is more reliable if you have strict anti-fraud or theft prevention schemes implied, otherwise you may have huge degree of risk. Control Panel facilitates you to enforce built-in anti-fraud plug-ins to avoid any sort of theft or unauthorized access.

To view Fraud Control you have to navigate to the following path:



There are seven following anti-fraud plug-ins. To Enable/Disable any plug-in, check the box on the left and Click on Enable/Disable as per your requirements. For further settings and explanation click on any of the following list.

1. [Country Black List](#)
2. [IP Black List](#)
3. [Credit Card Black List](#)
4. [Email Black List](#)
5. [Domain Name Black List](#)
6. [Phone Code Black List](#)
7. [Zip Pattern Black List](#)

Country Black List

Country blacklist plug-in works on an abstract level, it simply blocks the access for each access or the IP's of the specified country. You can set Add/Delete any country to/from the blacklist plug-in.

IP Black List

IP blacklist plug-in is limited to the scope of just single IP or the specified IP range. You can add any suspected or malicious IP to/from blacklist.

Note: Use IP range carefully because a single digit in range draw a big difference.

Credit Card Black List

Credit card blacklist plug-in is significantly important to avoid any sort of unauthenticated or unauthorized use of the card, once you found any card being used illegally or suspected so you can Add/Delete the card number to/from the blacklist.

Email Black List

Email blacklist plug-in is similar to IP blacklist plug-in but the difference is obvious that is it implies over Email address or addresses over a specified domain and this can be quite easy to restricted suspected or SPAM emails.

Note: Use *@DomainName.com to block all possible emails.

Domain name blacklist

Domain name blacklist plug-in is one step ahead then Email blacklist plug-in, you can simply Add/Delete the domain to/from the blacklist, which seems suspected or appear to be SPAM.

Phone Code Black List

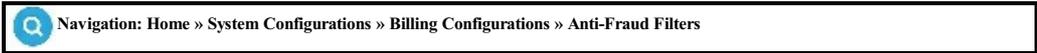
Phone code blacklist plug-in is another useful component which helps to restrict illegal or unauthorized access, by filtering phone number against the ones specified in the blacklist.

Zip Pattern Black List

Zip pattern blacklist plug-in is similar to phone code plug-in, but it its more strong as it has dual filtration by country and the pattern defined. It is quite simple to configure this plug-in by selecting a country and specifying the particular pattern to be blacklisted.

Anti Fraud Filters

Control Panel facilitates you to apply full proof and comprehensive anti-fraud filters which come as the built-in source towards proactive defense. You can enable/disable and configure these anti-fraud filters by navigating to:

 Navigation: Home » System Configurations » Billing Configurations » Anti-Fraud Filters

Here, **Threshold** is criteria of goodwill for a customer. The points will be awarded or deducted from customer reputе on successful/failed order respectively.

You may enable/disable the filter as per your requirement.

First Order Filter

This filter will be applied to a customer who has placed an order with the company for the first time. This filter may contain more strict rules to streamline a legitimate or fraud order.

You can enable/disable and configure these anti-fraud filters by navigating to:

 Navigation: Home » System Configurations » Billing Configurations » Anti-Fraud Filters

You can also delete/enable or disable the filter by clicking on the related button. You can define the settings by clicking on the **Create New Rule** and these rule parameters will be used for this filter.

Second Order Filter

This filter will be applied to a customer who has placed an order with the company previously. This filter may contain moderate rules to streamline a legitimate or fraud order. Since, a customer is already known so it may bypass some strict rules as set in First Order Filter.

You can enable/disable and configure these anti-fraud filters by navigating to:

 Navigation: Home » System Configurations » Billing Configurations » Anti-Fraud Filters » Fraud Filter Detail

You can also delete/enable or disable the filter by clicking on the related button. You can define the settings by clicking on the **Create New Rule** and these rule parameters will be used for this filter.

Payment Gateways

Payment gateway is an important third-party component/module among different business environment where online payments are concerned. As there are many factors involved in making an online transaction including the safety and security of confidential credentials and a trusted link to carry the transaction. Thus, by introducing some trusted and secure way to make online transaction, payment gateways are needed yet there are number of such gateways exist but at the platform of Control Panel you will be able to induce the only the supported gateways.

To configure any of the above payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.

 Navigation: Home » System Configurations » Billing Configuration » Payment Gateways

For editing the settings on the gateways, click on **Configure**. When PCI compliance mode is **Enabled** following Payment Gateways will be shown:

Provider	Integration Status	Status	Options
2Checkout	Stable	Enabled	Configure
PayPal Express CheckOut	Stable	Enabled	Configure
Mollie	Stable	Enabled	Configure
Authorize.Net CIM	Stable	Enabled	Configure
PayPal Pro	Stable	Enabled	Configure
Zarin Pal	Stable	Enabled	Configure
Authorize.Net CIM Hosted	Stable	Enabled	Configure
Stripe	Stable	Enabled	Configure
PayPal Braintree	Stable	Enabled	Configure
PayStack	Stable	Enabled	Configure
Rabo Omnikassa	Stable	Enabled	Configure
PayiBAN SEPA Direct Debit	Stable	Enabled	Configure
Stripe Checkout	Stable	Enabled	Configure
Safer Pay	Stable	Enabled	Configure
Razor Pay	Stable	Enabled	Configure

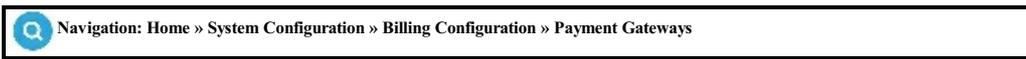
When PCI Compliance Mode is **Disabled** following Payment Gateways will be shown:

Provider	Integration Status	Status	Options
2Checkout	Stable	Enabled	Configure

PayPal Express CheckOut	Stable	Enabled	Configure
BeanStream	Stable	Enabled	Configure
ESelectPlus	Stable	Enabled	Configure
Payment Junction	Stable	Enabled	Configure
Raven	Stable	Enabled	Configure
VCS	Stable	Enabled	Configure
St.George	Stable	Enabled	Configure
SoEasyPay	Stable	Enabled	Configure
Mundipagg	Stable	Enabled	Configure
Zarin Pal	Stable	Enabled	Configure
PayStack	Stable	Enabled	Configure
Rabo Omnikassa	Stable	Enabled	Configure
PayiBAN SEPA Direct Debit	Stable	Enabled	Configure
Stripe Checkout	Stable	Enabled	Configure
Razor Pay	Stable	Enabled	Configure

Configure Provider: 2Checkout

To configure 2Checkout as your payment gateway navigate to the following path:



Click on the **Configure** and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Merchant ID:** Enter your 2Checkout merchant ID.
5. **API URL:** Defaults to <https://www.2checkout.com/2co/buyer/purchase?>. Usually you don't need to change this.
6. **Validate Gateway Response:** Enable this checkbox if you want to validate gateway response with a validation code you provide.
7. **Validation Code:** Enter the validation code to validate gateway response. You must login to your 2checkout merchant control center to retrieve this code.
8. **Text to show if selected:** Type necessary text.

Click **Save** when you are done.

Since 2Checkout.com is HTML gateway therefore there is additional setting to be done in your 2Checkout Merchant Control Center. To do this setting, follow procedure below:

1. Login to your 2Checkout.com control center.
2. Scroll down and click **Look & Feel** settings under **Helpful Links**.
3. Scroll down the page and enter <http://YourSite.com:786/Client/2COReturnPage.aspx> under **Approved URL** and **Pending URL**. Here <http://YourSite.com:786> is your Control Panel control panel URL.

This procedure tells 2Checkout where to send payments information (IPN). If this procedure is not followed you will have to manually enter New Payments in Control Panel.

IMPORTANT: Since 2Checkout doesn't send IPN notifications for recurring payments therefore you will have to manually enter all recurring payments in billing system.

Configure Provider: PayPal Express Checkout

IMPORTANT: You'll need to create an API username for PayPal, which is different from your PayPal username. Give the API username, password and signature in the settings below. Follow these steps.

1. Log in to your PayPal Business account.
2. Click **My Account**.
3. Click **Profile**.
4. Under Account Information, click **API Access**
5. Click **Request API Credentials**.
6. Click **API Signature**.
7. Click the **Agree** checkbox.
8. Click **Submit**.

To configure PayPal as your payment gateway, navigate to the following path:



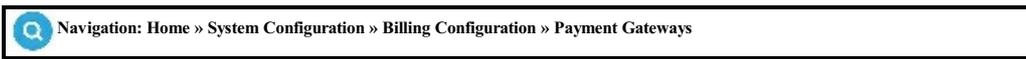
Click on the **Configure** and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **API Client ID:** Please go to <https://developer.paypal.com/developer/applications/> , scroll down, and either use existing REST API APP or create new one. To create a PayPal app and get API Client ID, please visit: <https://developer.paypal.com/developer/applications/create>
5. **Text to show if selected:** Type necessary text.

Click **Save** when done.

Configure Provider: Mollie

To configure Mollie as your payment gateway navigate to the following path:



Click on the **Configure** and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Merchant ID:** Enter your Mollie merchant ID.

Click **Save** when you are done.

Configure Provider: Authorize.NET

To configure Authorize.NET as your payment gateway navigate to the following path:

 Navigation: Home » System Configuration » Billing Configuration » Payment Gateways

Click on the **Configure** and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **API Login:** Enter your Authorize.NET API login ID. You must login to your Authorize.NET account to retrieve this login ID. It should be under Account Settings.
5. **API Transaction Key:** You must login to your Authorize.NET account to retrieve this key. It should be under Account Settings.
6. **API URL:** Defaults to *https://secure.authorize.net/gateway/transact.dll*. Usually you don't need to change this.
7. **Validate Gateway Response:** Enable this checkbox if you want to validate gateway response with a validation code you provide.
8. **Validation Code:** Enter the validation code to validate gateway response. You must login to your Authorize.NET account to retrieve this code.
9. **Text to show if selected:** Type necessary text.

Click **Save** when done.

Configure Provider: PayPal Pro

To configure any of the available payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.

 Navigation: Home » System Configuration » Billing Configuration » Payment Gateways

For editing the settings on the gateways, click on **Configure**.

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Secret Key:** Provide secret key.
5. **API URL:** Provide api url.
6. **Text to show if selected:** Provide text.

Click on **Save** button when done.

Configure Provider: ST. George

To configure St.George as your payment gateway navigate to the following path:

 Navigation: Home » System Configuration » Billing Configuration » Payment Gateways

Click on the **Configure** and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Server:** Type the server of the St.George. i.e. www.gwipg.stgeorge.com.au
4. **Port:** Enter the port number of the St.George.
5. **Customer ID:** Enter customer Id of the test account.
6. **Certificate:** Enter certificate number.
7. **Password:** Enter password.
8. **Text to show if selected:** Type necessary text.

Click on **Save** button when done.

Configure Provider: BeanStream

To configure BeanStream as your payment gateway navigate to the following path:

 Navigation: Home » System Configuration » Billing Configuration » Payment Gateways

Click on the **Configure** and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Merchant ID:** Enter your BeanStream merchant ID.
5. **API Username:** Provide API Username.
6. **API Password:** Provide API password.
7. **Text to show if selected:** Provide text to show.

Click **Save** when you are done.

Configure Provider: ESSelectPlus

To configure ESSelectPlus as your payment gateway navigate to the following path:

 Navigation: Home » System Configuration » Billing Configuration » Payment Gateways

Click on the **Configure** and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.

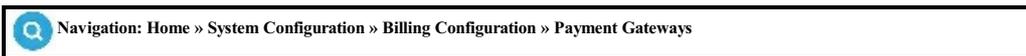
Provider Configuration

1. **API Token:** Enter your ESSelectPlus API Token.
2. **Store ID:** Enter the store id.
3. **API URL:** Enter the API url.
4. **Text to show if selected:** Type necessary text.

Click **Save** when you are done.

Configure Provider: Payment Junction

To configure Payment Junction as your payment gateway navigate to the following path:



Click on the **Configure** and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **API Login:** Enter your Payment Junction API login ID. You must login to your Payment Junction account to retrieve this login ID. It should be under Account Settings.
5. **API Password:** You must login to your Payment Junction account to retrieve this key. It should be under Account Settings.
6. **API URL:** Defaults to *www.payjunctionlabs.com*.
7. **Text to show if selected:** Provide text.

Click on **Save** button when done.

Configure Provider: Raven

To configure Raven as your payment gateway navigate to the following path:



Click on the **Configure** and follow the instructions below:

Provider Status section shows the following fields:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.

Provider Configuration section displays the following fields:

1. **User name:** Provide the user name.
2. **Shared Secret:** Provide shared secret.
3. **PRN (Payment Routing Number):** Provide payment routing number (PRN).
4. **Text to show if selected:** Provide text.

Click on **Save** button when done.

Configure Provider: Virtual Card Services VCS

To configure VCS as your payment gateway navigate to the following path:

 Navigation: Home » System Configuration » Billing Configuration » Payment Gateways

Click on the **Configure** and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Terminal-Id/User-Id:** Provide the Terminal-id/user-id.
4. **Gateway Url:** It is the Gateway URL. You don't need to change this URL.
<https://www.vcs.co.za/vvonline/ccxmlauth.asp>
5. **Text to show if selected:** Type necessary text.

Click on **Save** button when done.

Configure Provider: SoEasyPay

To configure SoEasyPay as your payment gateway navigate to the following path:

 Navigation: Home » System Configuration » Billing Configuration » Payment Gateways

Click on the **Configure** and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Terminal-Id/User-Id:** Provide the Terminal-id/user-id.
4. **Gateway Url:** It is the Gateway URL. You don't need to change this URL.
<https://secure.soeasypay.com/gateway.aspx>
5. **Text to show if selected:** Type necessary text.

Click on **Save** button when done.

Configure Provider: MundiPagg

To configure MundiPagg your payment gateway navigate to the following path:

 Navigation: Home » System Configurations » Billing Configuration » Payment Gateways

Click on the **Configure** and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Merchant Key:** Provide MundiPagg Merchant Key.
5. **Gateway Url:** Provide gateway URL.
6. **Text to show if selected:** Type necessary text.

Click **Save** when you are done.

Configure Provider: Zarin Pal

To configure Mollie as your payment gateway, navigate to the following path:

 Navigation: Home » System Configurations » Billing Configuration » Payment Gateways

Click on the **Configure** and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Merchant ID:** Provide Merchant ID.
4. **API URL:** Enter Zarin Pal API URL.
5. **Text to show if selected:** Provide text.

Click **Save** when you are done.

Configure Provider: Authorize.NET CIM Hosted

To configure Authorize.NET CIM Hosted as your payment gateway, navigate to the following path:



Click on the **Configure** and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **API Client ID:** Enter your **Authorize.NET CIM Hosted** Client ID.
5. **API Transaction Key:** You must login to your **Authorize.NET CIM Hosted** account to retrieve this key. It should be under Account Settings.
6. **Text to show if selected:** Type necessary text.

Click **Save** when done.

Configure Provider: Stripe

To configure any of the available payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.

 Navigation: Home » System Configuration » Billing Configuration » Payment Gateways

To configure the settings for a gateway, click on **Configure**.

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Publishable Key:** Provide publishable key.
5. **Secret Key:** Provide secret key.
6. **Text to show if selected:** Provide text.

Click on **Save** button when done.

Configure Provider: PayPal Braintree

To configure any of the available payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.

 Navigation: Home » System Configuration » Billing Configuration » Payment Gateways

For editing the settings on the gateways, click on **Configure**.

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Braintree Merchant Id:** Provider braintree merchant id.
5. **BraintreeSecret Key:** Provide secret key.
6. **Braintree Public Key:** Provide public key.
7. **Text to show if selected:** Provide text.

Click on **Save** button when done.

Configure Provider: PayStack

To configure any of the available payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.

Navigation: Home » System Configuration » Billing Configuration » Payment Gateways

For editing the settings on the gateways, click on **Configure**.

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Secret Key:** Provide secret key.
5. **Public Key:** Provide public key.
6. **Text to show if selected:** Provide text.

Click on **Save** button when done.

Configure Provider: Rabo OmniKassa

To configure any of the available payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.

Navigation: Home » System Configuration » Billing Configuration » Payment Gateways

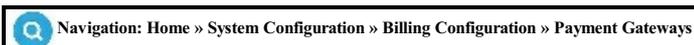
For editing the settings on the gateways, click on **Configure**.

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
3. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
4. **Signing Key:** Provide signing key.
5. **Refresh Token:** Provide refresh token.
6. **Text to show if selected:** Provide text.

Click on **Save** button when done.

Configure Provider: PayiBAN SEPA Direct Debit

To configure PayiBAN SEPA Direct Debit as your payment gateway, navigate to the following path:

 Navigation: Home » System Configuration » Billing Configuration » Payment Gateways

Important: SEPA payment method only works with EURO. Provider/Owner must have tenant account for PayiBank. Merchant must be added and API keys must be generated in tenant before proceeding.

Click on the **Configure** and follow the instructions below:

Provider

1. **Provider:** It shows PayiBAN SEPA Direct Debit
2. **Friendly name:** Provide friendly name of payment gateway.
3. **Enabled:** Select Yes or No.
4. **Enable Test Mode:** It will shows if test mode is available.

Provider Configuration

PayiBank Details (These details will be fetched from your PayiBank Reseller Account "This is an API Account" for automated e-mandate creation):

- **PayiBank Tenant API Key:** You get this key from PayiBank reseller account.
- **PayiBank Tenant REST API URL:** This needs to be set as per Payment Gateway state (Test or Live). In both cases their respective URLs will be as follows:
 - i. **LIVE URL:** <https://payibank.io/api>
 - ii. **TEST URL:** <https://acc.payibank.io/api>

PayiBAN Details (These details will be fetched from your PayiBAN Account "This is the actual account in which direct debits and corresponding XML batches can be managed")

- i. **PayiBAN API User Name:** Account Username.
- ii. **PayiBAN API Password:** Account Password.
- iii. **PayiBAN Client ID:** This can be found under Account Profile.
- iv. **PayiBAN API URL:** This is a static URL i.e. <https://api.payiban.com/webservice/index.php>

Creditor's (payment recipient's) Bank Details (will be provided by corresponding bank):

1. IBAN
2. BIC
3. Direct Debit Collector ID
4. Creditor Id
5. Creditor Name
6. Creditor Country

Additional Panel related options for SEPA Flow and Direct Debit:

1. **Instrumentation:** We have two types of SEPA Mandates: B2B and CORE. Select and configure corresponding instrumentation type for your resellers and customers. (each reseller will get the same options and will need to configure these as per his needs for their end customers).
 - a. **B2B stands for:** Business to Business. This is used when the Reseller has a real Business Bank account.
 - b. **CORE stands for:** Business to Consumer. This is used when the Reseller is a small company and has a Personal Bank account only.
2. **Allow to create profile from store:** These are generic settings for payment gateways, for online store and may not be useful in case of SEPA. With these settings, the customer is able to add their payment profile details directly via the online store. Like if you are using a credit card, the system will allow to add credit card directly via store when placing order. For SEPA not sure if the setting is valid.
3. **Restrict Reseller's navigation in Panel (if no SEPA mandate exists):** If restrict reseller navigation is selected, reseller have to create its SEPA mandate in his my provider section. Otherwise they will not be allowed to access

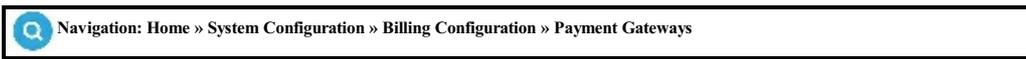
any interface after login (where ever they click, they will automatically be redirected to add SEPA mandate page.)

4. **Text to show if selected:** Gateway text is not useful in case of SEPA, normally we display it in summary box, while doing payment in checkout process in front of selected payment gateway checkbox.
5. **Gateway handling fee:** The gateway handling fee is added in invoice for recurring invoices and new orders if client uses this gateway for payment(s). 1st order is exempted of gateway charges.

Click **Save** when done.

Configure Provider: Stripe Checkout

To configure any of the available payment gateways, you will have to navigate to the following path:



To configure the settings for a gateway, click on **Configure**.

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Friendly name:** Provide friendly name of the payment gateway.
3. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
4. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.

Provider Configuration

1. **Publishable Key:** Provide publishable key.
2. **Secret Key:** Provide secret key.
3. **Text to show if selected:** Provide text.
4. **Gateway handling fee:** The gateway handling fee is added in invoice for recurring invoices and new orders if client uses this gateway for payment(s). 1st order is exempt of gateway charges.

Click on **Save** button when done.

Configure Provider: Safer Pay

To configure any of the available payment gateways, you will have to navigate to the following path:

 Navigation: Home » System Configuration » Billing Configuration » Payment Gateways

To configure the settings for a gateway, click on **Configure**.

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Friendly name:** Provide friendly name of the payment gateway.
3. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
4. **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.

Provider Configuration

1. **API Username:** Provide API username.
2. **API Password:** Provide api password.
3. **Safer Pay Customer Id:** Provider safer pay customer Id.
4. **Terminal ID:** Provide terminal id.
5. **Text to show if selected:** Provide text.
6. **Gateway handling fee:** The gateway handling fee is added in invoice for recurring invoices and new orders if client uses this gateway for payment(s). 1st order is exempt of gateway charges.

Click on **Save** button when done.

Configure Provider: Razor Pay

To configure Razor Pay as your payment gateway, navigate to the following path:

 Navigation: Home » System Configuration » Billing Configuration » Payment Gateways

Click on the **Configure** and follow the instructions below:

1. **Provider:** Shows the name of provider you are configuring. Not editable.
2. **Friendly name:** Provide friendly name.
3. **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
4. **Enable Test Mode:** Select YES if you want to enable test mode.
5. **API Key:** Provide razor pay API key..
6. **Secret Key:** Enter Razor Pay secret key.
7. **Text to show if selected:** Provide text.
8. **Gateway handling fee:** Provide gateway handling fee.

Click **Save** when done.

Email Templates

The flow of handy and well managed information among different involved entities in a business is the primary goal to be achieved. As, this plays a very significant role in each business operation, one of such managed piece of information could be in the form of an email or a draft which can be your business identity for a product or any other important document. Thus, Control Panel provides you different email templates which you can modify according to your needs and trends with ease and flexibility to interact with your customers for billing issues or any other concerns.

To setup email templates you have to navigate to the following path:



Navigation: Home » System Configurations » Email Configurations

Select **Email Templates** to manipulate templates. [Click here](#) to customize Email templates.

Note: SMTP user name MUST be complete email address.

Customizing Email Templates

The emails that are sent out to your customers can be fully customized. Before customizing templates, understand the following concept.

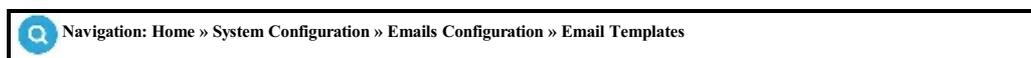
Runtime Variables: Runtime variables are set of variables which you can use in the email template. These variables are replaced with actual value at the time of email generation. Runtime variables are great for fully customizing your emails.

Example: If you insert %companyName% variable in an email template it will be replaced with "Your Company Name" when the email is actually sent out to the customer.

When customizing email template, you will notice 3 types of runtime variables available.

1. **Company Variable:** These are set of company related variables.
2. **Customer Variables:** These are set of customer related variables.
3. **Group Variables:** These are specific to email group you are editing. For example, when editing Package Information Group emails you will see variables like %packageName%, %subscriptionID% etc.

To customize email template navigate to the following path:



The Email Templates screen shows the following:

- **Operations:** Under this box you set the email addresses for the email group. You can configure different email addresses for each email group.

Click **Edit Template** button for the template you wish to customize. The edit template screen shows following:

1. **Email template group:** Select template group.
2. **Email template name:** Select template name.
3. Click **Load Default Template** to return to default email.
4. **Change email template name:** Friendly name. You don't need to change this setting.
5. **Locale Language:** Set the language locale for your email.
6. **Email priority:** Set the priority flag for your email.
7. **Subject:** This is the subject with which the email is sent. You can use variables in the subject line too.
8. **Body:** This is the actual email body. You can use %Variables% inside body. You can change the text in your emails but you **MUST** use valid variables. Use the drop down list boxes for automatic insertion at cursor location instead of typing it.
9. **Kill Template:** Enable this check box if you want to suppress the email template. In this case the email will always be bypassed.
10. **Enable/Disable all Templates of Group:** Select option to Enable/Disable templates.
11. **Set as default:** You can set a template as default.
12. **Do not send to Customer:** Check this option so that email is not sent to customer.

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

Email Delivery Settings

Control Panel support SMTP mail sending method. SMTP method is easiest and most fastest method.

To configure email delivery, navigate to the following path:

 Navigation: Home » System Configuration » Emails Configuration » Email Delivery

Email Delivery screen shows the following:

1. **SMTP Server:** Set here the SMTP server you use for emails. Example: mail.xyzhost.com.
2. **Port:** Set here the port number for your SMTP server. Default port is 25.
3. **SMTP server requires authentication:** Enable this check box if your SMTP server requires authentication.
4. **SMTP User Name:** Enter SMTP user name if SMTP authentication is ON. It is usually in user@domain.com format.
5. **Password:** Enter your SMTP password.

Click **Save** when you are done.

Domain Registrars

There is ever growing list of domain registrars supported by Control Panel. This includes eNom, DirectI, Offline Domain Registrar and Stargate. To view the list of available hosting panel providers navigate to the path:

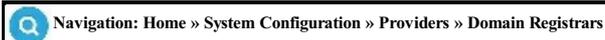
 Navigation: Home » System Configuration » Providers » Domain Registrars

You may configure your required provider by clicking on the **Configure**.

Provider	Integration Status	Status	Options
Direct I (Logic Boxes)	Stable	Enabled	a. Configure b. Enable/Disable
DK Hostmaster Registry	Stable	Enabled	a. Configure b. Enable/Disable
Enom	Stable	Enabled	a. Configure b. Enable/Disable
GoDaddy	Stable	Enabled	a. Configure b. Enable/Disable
Offline Domain Registrar	Stable	Enabled	a. Configure b. Enable/Disable
OpenSRS	Stable	Enabled	a. Configure b. Enable/Disable
Registry.be	Stable	Enabled	a. Configure b. Enable/Disable
RRPproxy	Stable	Enabled	a. Configure b. Enable/Disable
RRPproxy EPP	Stable	Enabled	a. Configure b. Enable/Disable
SIDN EPP	Stable	Enabled	a. Configure b. Enable/Disable
StarGate	Stable	Enabled	a. Configure b. Enable/Disable
TransIP	Stable	Enabled	a. Configure b. Enable/Disable

Direct I/Logic Boxes

To configure DirectI domain registrar navigate to the following path:

 Navigation: Home » System Configuration » Providers » Domain Registrars

Click on the **Configure** and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your DirectI reseller login ID.
5. **Test mode Password:** Enter your DirectI reseller password.
6. **Test mode Parent ID:** Enter your DirectI Parent ID. Contact DirectI or its reseller for the ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

DK Hostmaster Registry

In order to configure DK hostmaster registry domain registrar navigate to the following path:

Navigation: Home » System Configuration » Providers » Domain Registrars

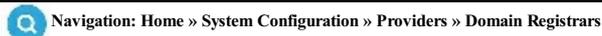
Click on the **Configure** and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your DK hostmaster reseller login ID.
5. **Test mode Password:** Enter your DK hostmaster reseller password.
6. **Test mode Parent ID:** Enter your DK hostmaster Parent ID. Contact DK hostmaster or its reseller for the ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

eNom

To configure eNom domain registrar navigate to the following path:

 Navigation: Home » System Configuration » Providers » Domain Registrars

Click on the **Configure** and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your eNom reseller login ID.
5. **Test mode Password:** Enter your eNom reseller password.
6. **Test mode Parent ID:** Enter your eNom Parent ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Parked Domain Name Servers:** Select the name servers assigned by default to domain registrations.
10. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
11. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
13. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Important: eNom TEST and LIVE servers are restricted by IP. You must contact eNom support, provide them your IP and request to allow it for TEST/LIVE API calls.

To do this:

1. Log into your eNom reseller account, click on left menu option Help then eNom **Support Center**.
2. Click the request help feature from Support Center tool.
3. Send your login name and the IP address you want added to the live environment.
4. You will receive a confirmation email with the case assigned.
5. eNom will reply back via the assigned case when it's completed.

Click **Save** when done.

GoDaddy

In order to configure GoDaddy domain registrar navigate to the following path:

Navigation: Home » System Configuration » Providers » Domain Registrars

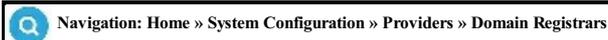
Click on the **Configure** and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your GoDaddy reseller login ID.
5. **Test mode Password:** Enter your GoDaddy reseller password.
6. **Test mode Parent ID:** Enter your GoDaddyParent ID. Contact GoDaddy or its reseller for the ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

Offline Domain Registrar

To configure Offline Domain Registrar navigate to the following path:

 Navigation: Home » System Configuration » Providers » Domain Registrars

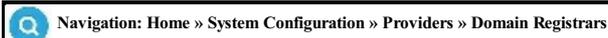
Click on the **Configure** and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your Offline Domain Registrar reseller login ID.
5. **Test mode Password:** Enter your Offline Domain Registrar reseller password.
6. **Test mode Parent ID:** Enter your Offline Domain Registrar Parent ID. Contact Offline Domain Registrar or its reseller for the ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

Open SRS

To configure OpenSRS domain registrar navigate to the following path:

 Navigation: Home » System Configuration » Providers » Domain Registrars

Click on the **Configure** and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your OpenSRS reseller login ID.
5. **Test mode Password:** Enter your OpenSRS reseller password.
6. **Test mode Parent ID:** Enter your OpenSRS Parent ID. Contact OpenSRS or its reseller for the ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

Registry.be

To configure RegistryBE domain registrar navigate to the following path:

Navigation: Home » System Configuration » Providers » Domain Registrars

Click on the **Configure** and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your RegistryBE reseller login ID.
5. **Test mode Password:** Enter your RegistryBE reseller password.
6. **Test mode Parent ID:** Enter your RegistryBE Parent ID. Contact RegistryBE or its reseller for the ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

RRPproxy

To configure RRPproxy domain registrar navigate to the following path:

 Navigation: Home » System Configuration » Providers » Domain Registrars

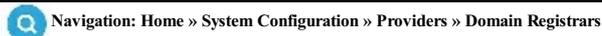
Click on the **Configure** and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your RRPproxy reseller login ID.
5. **Test mode Password:** Enter your RRPproxy reseller password.
6. **Test mode Parent ID:** Enter your RRPproxy Parent ID. Contact RRPproxy or its reseller for the ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

RRPproxy EPP

To configure RRPproxy EPP domain registrar navigate to the following path:

 Navigation: Home » System Configuration » Providers » Domain Registrars

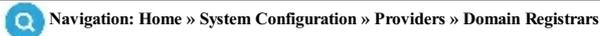
Click on the **Configure** and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your RRPproxy EPP reseller login ID.
5. **Test mode Password:** Enter your RRPproxy EPP reseller password.
6. **Test mode Parent ID:** Enter your RRPproxy EPP Parent ID. Contact RRPproxy EPP or its reseller for the ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

SIDN EPP

To configure SIDN EPP domain registrar navigate to the following path:

 Navigation: Home » System Configuration » Providers » Domain Registrars

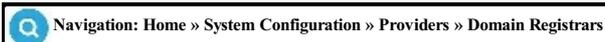
Click on the **Configure** and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your SIDN EPP reseller login ID.
5. **Test mode Password:** Enter your SIDN EPP reseller password.
6. **Test mode Parent ID:** Enter your SIDN EPP Parent ID. Contact SIDN EPP or its reseller for the ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

Stargate

To configure Stargate domain registrar navigate to the following path:

 Navigation: Home » System Configuration » Providers » Domain Registrars

Click on the **Configure** and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your Stargate reseller login ID.
5. **Test mode Password:** Enter your Stargate reseller password.
6. **Test mode Parent ID:** Enter your Stargate Parent ID. Contact Stargate or its reseller for the ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

TransIP

To configure TransIP domain registrar navigate to the following path:



Click on the **Configure** and follow the instructions below:

1. **Display Name:** Friendly name for this provider. No need to change this field.
2. **Enabled:** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
3. **Enable Test Mode:** Select YES if you want to perform test domain registrations.
4. **Test mode User name:** Enter your TransIP reseller login ID.
5. **Test mode Password:** Enter your TransIP reseller password.
6. **Test mode Parent ID:** Enter your TransIP Parent ID. Contact TransIP or its reseller for the ID.
7. **Allow Transfer:** Will you allow domain transfer? Select Yes.
8. **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
9. **Allow Register Name Server:** Will you allow to register child name servers? If selected Yes, customer can register child name servers using customer control panel.
10. **Admin Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
11. **Technical Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.
12. **Billing Contact:** Check **Use Customer Profile Data** if you want to use customer's profile for admin contact of newly registered domains, otherwise enter the information in the fields given.

Click **Save** when done.

Notifications

This is an announcement facility that is provided to facilitate display of major announcements, alerts and notifications right at the dashboard. For example, when invoices are sent automatically, account expiry alerts, suspension alerts etc.

To view list of notifications that would display at the login or dashboard, navigate to following path:



Note: You may modify or remove existing notifications by clicking on **Edit** or **Delete** respectively.

You can include new notifications by clicking at the **Add Notification** button. Simply fill in the following necessary fields and click **Save** to continue:

1. **Title:** Main head for the notification.
2. **Notification:** Description of corresponding notification goes here.
3. **Start Date:** Select the start date from which the notification will become active.
4. **End Date:** Specify the end date after which the notification will be de-activated automatically.
5. **Visible To:** Select transparency level e.g. notification visible to Reseller, customer or not.
6. **Display Area:** Select your desired placement for notification to appear, either at the login or at the dashboard or both.

How to email notifications?

Select **Email Notifications** tab. Click **Compose Email** to configure email Notifications for customers:

1. **Subject:** Provide subject.
2. **Select Product Type:** Select product e.g. Active Directory, Exchange etc.
3. **Send To (Customers):** Select customers.
4. **From Address:** Provide from email address.
5. **From Name:** Provide from name.
6. **From Email:** Select from email address.
7. **Reply to mode:** Select reply to mode.
8. **Attachment:** Select attachment if any.
9. **Body:** Provide email body.
10. **Schedule:** Checkbox to schedule.

Click **Save** when done.

MailChimp

Mailchimp is a marketing automation platform and an email marketing service. To configure mailchimp in control panel navigate to following path:

Navigation: Home » System Configuration » MailChimp

Under **MailChimp Settings** tab select **Enabled** and provide API settings as below:

- **API Url:** Provide API url.
- **API Key:** Provide API Key.

Hint: Log in to mailchimp.com, go to **Account**, go to **Extras**, click on **API Keys** and create a key.

Click **Save** when done.

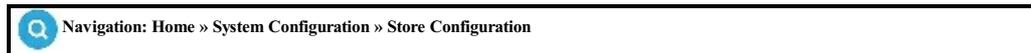
Configuring Store and Setting Up Order Form(s)

Control Panel provides built-in store front for online sale of services. You can launch Store using Order Form. You have option to create multiple store portals (order forms). These order forms enable you to sell your products and bill them by presenting a front end/store front to the customer. It is very easy to build an online store using Control Panel's Store Order Form. Using order forms you can sell products, charge credit card and provision services.

This online store enables users to select services you offer on the online store, it allows them to create new accounts or use their existing account to purchase services. It allows new customers to select services, make their account and pay for the purchased services in the same go. They can choose different products and services using this very self-intuitive web interface.

You may create unlimited number of order forms in Control Panel each branding for different set of product and currencies.

To setup order form navigate to the following path:



Note: You may also edit the existing order form by clicking on the **Edit**.

Click **New Order Form** button and follow the instructions below:

1. **Order Form Name:** The name for your order form.
2. **Payment Groups:** Select the currency this order form will use. You may assign more than 1 Payment Group to order form but you have to ensure the products are configured for all the selected currencies.
3. **Domain option:** Select whether domain purchasing will be available on the form or not.
4. **Pay by Cheque Allowed:** Select *Yes* if you want to allow Cheque payment on checkout.
5. **Pay by Bank Draft Allowed:** Select *Yes* if you want to allow Bank draft payment on checkout.
6. **Pay by Invoice:** Select *Yes* if you want to allow submitting order without payment. In this case order is registered in system and held until user pays the invoice.
7. **Continue Shopping URL:** Enter the URL where you want to take user when **Continue Shopping** button on the form is clicked.
8. **Terms URL:** Enter the URL where terms of service is available.
9. **Products sold through this Order Form:** Select the products you wish to sell via the order form you are setting up.

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

Once the order form is set up, you will see **Launch Store**. Click on Launch to review the newly configured store. Copy the URL from the address bar of the newly opened window of store front page and publish it on the web. The URL is same as the control panel URL with additional parameters like store ID.

Staff Users

Staff users are your staff member who can access the administrative features. To view staff users navigate to the following path:

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

To create a staff user click on **Add Staff Member** button.

The list of staff users displays following:

1. **Status:** It shows the status of the user.
2. **Name:** The full name of staff user.
3. **Email:** The email address of staff user. It is also the login ID for staff user.
4. **Last Login:** Shows the last login date and time.
5. **Last Login IP:** Shows the IP from where this user logged-in.
6. **Options:** It shows options to **Edit** and **Disable** the staff users.

Add Staff User

Staff users are your staff member who can access the administrative features.

To add staff users, navigate to the following path:

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

Click **Add Staff Member** button and follow the instructions below:

1. **Passport Login:** Enter the email address of user. This is used as login for the system.
2. **Passport Password:** Enter a password for the staff member.
3. **Authenticate via AD Account:** The AD users can also be authenticated by providing UPN.
4. **Roles:** Select the Roles you want to assign to staff user. [New roles](#) can be created and assigned to users.

Primary Contact: Here only First Name and Last Name fields are compulsory. Other can be left blank.

Click **Save** button when finished.

Add Sub Reseller

A sub-reseller is partner of a reseller who can manage some assigned customers (during customer creation you can choose if that customer can be managed by the sub-reseller and choose that sub-reseller).

It is a three step process:

1. Add Sub reseller role
2. Add Staff User and assign sub reseller role
3. Choose sub reseller during customer creation

Step-1:

Create a sub reseller role. In order to add a sub reseller role, navigate to the following Path:

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

To create a [new Sub Reseller role](#), click **Add New Role** button and check option **Is sub reseller**.

Step-2:

Create a new staff user and assign sub reseller role created in step-1. Navigate to following path:

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

Click **Add Staff Member** button to [add a staff user](#).

Step-3:

If you want your customer to be managed by this sub reseller you can assign this sub reseller during **create customer**. Navigate to following path:

Navigation: Home » Customer Manager » Customers

Now click **New Customer** to add a [new customer](#). Select sub reseller under **Managed By Sub Reseller**.

To update existing customers you need to select Customers(s) from the listing. You will see button **Update Sub Reseller**. Click **Update Sub Reseller** and select sub reseller from the drop down list.

Click **Save and Apply** when done.

Configure Password

To configure password policy for control panel customers and users, navigate to the following path:

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

Password Configuration

Under **Configuration** tab, you can also set password length and complexity.

1. **Must contain at least 1 capital and 1 small alphabet:** Select option to define complexity.
2. **Must contain at least 1 numeric character:** Select option to define complexity.
3. **Must contain at least 1 special character:** Select option to define complexity.
4. **Minimum password length:** Minimum length should be at least 8 characters.
5. **Enable Password Expiration:** Select option to enable password expiration in control panel.
 - i. **Password expires in:** Provide number of days.
 - ii. **Exclude users from password expiration:** Select and add Users.

Click **Save** button when finished.

Staff Roles

Staff roles define privileges assigned to the Staff member. To view staff roles navigate to the following path:

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

To create a new role, click **Add New Role** button. There are couple of pre-defined roles that come packaged with Control Panel. These roles include:

1. **Super Administrator:** This role has full unrestricted access to the system. Assign this role only to the staff members who will have full access to every feature of the system.
2. **Billing Administrator:** This role can access only billing relevant section of system. For example, this role can access *Billing Manager* section but cannot view *Network Eye* section.
3. **Help Desk Administrator:** This role can access only Help Desk section of the system.
4. **Network Administrator:** This role can access only *Network Eye* section.

You cannot edit default roles but you can create new roles and assign them to your staff members.

Add Staff Role

Staff roles define privileges assigned to the Staff member.

To add new staff roles, navigate to the following path:

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

To create a new role, click **Add New Role** button and follow the instructions below:

1. **Role Name:** Enter the name for this role.
2. **Role Description:** Enter some description here.
3. **Is sub reseller:** Select this option if this staff user is a subreseller .
4. **Features Access:** Click the check boxes to define which system areas this role can access. Click '+' to expand for sub-features of each module.
 - i. Billing Manager
 - ii. Customer Manager
 - iii. Help Desk Manager
 - iv. Product Manager
 - v. Service Director
 - vi. System Configuration
 - vii. Exchange Hosting
 - viii. Work Folders Hosting
 - ix. RDS Hosting

Click **Save** button when finished.

Enable IP LockDown

IP LockDown define privileges assigned to the Staff member. To lock an IP navigate to the following path:

Navigation: Home » System Configuration » System Users » IP LockDown

There are the following options for IP lock.

1. **IP LockDown for the staff:** Check this option to enable lock for staff and click on **Save** button.
2. **IP Addresses:** Add IP addresses and click on **Save** button.

Note: You will not able to login from any other IP if IP LockDown is enabled.

License Management

To view reseller licenses navigate to the following path:

 Navigation: Home » System Configuration » License Management

You can view following:

1. **License:** It shows the Licence related to its module such as CAL, MAL etc
2. **Total:** It shows the total number of licenses.
3. **Allocated to Customer:** It show how many allocated to customers
4. **In Use:** It shows the number of licenses in use.
5. **Available:** It show the number of available licenses.

All Subscriptions

To view All Subscriptions navigate to the following path:

 Navigation: Home » My Provider » Subscriptions » All Subscriptions

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

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. Dedicated Server Hosting
 - iv. Microsoft Exchange
 - v. Microsoft SharePoint
 - vi. Microsoft CRM
 - vii. Microsoft Skype4B
 - viii. Microsoft CSP
 - ix. VPS Hosting
 - x. Work Folders Hosting
 - xi. RDS Hosting
 - xii. SSL Products
4. **Status:** Select the status e.g. active, deleted, on-hold, pending, graced ,expired etc.

It displays the following columns for all Subscriptions, click on a [Subscription to view details](#):

1. **Status:** It shows the status of the subscription.
2. **Subsc.ID:** It displays the subscription ID.
3. **Subscription Name:** It displays the subscription name.
4. **Service Type:** It shows the type of the service.
5. **Start Date:** It displays the starting date.
6. **Next Renewal:** It displays the next renewal.

Expiring Subscriptions

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

 Navigation: [Home](#) » [My Provider](#) » [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. Dedicated Server Hosting
 - iv. Microsoft Exchange
 - v. Microsoft SharePoint
 - vi. Microsoft CRM
 - vii. Microsoft Skype4B
 - viii. Microsoft CSP
 - ix. VPS Hosting
 - x. Work Folders Hosting
 - xi. RDS Hosting
 - xii. SSL Products
4. **Status:** Status shown is **Graced**.

Then click **Search** button.

Expired Subscriptions

To view Expired Subscriptions you have to navigate through the following path:

 Navigation: Home » My Provider » Subscriptions » Expired Subscriptions

Expired subscription can be searched by :

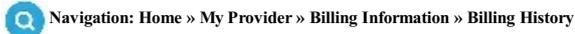
1. **Subsc.ID:** It is the unique ID for the expired subscription.
2. **Domain Name:** It shows the domain name.
3. **Service Type:** The following are the types of the services:
 - i. Domain Name Products
 - ii. Shared Hosting
 - iii. Dedicated Server Hosting
 - iv. Microsoft Exchange
 - v. Microsoft SharePoint
 - vi. Microsoft CRM
 - vii. Microsoft Skype4B
 - viii. Microsoft CSP
 - ix. VPS Hosting
 - x. Work Folders Hosting
 - xi. RDS Hosting
 - xii. SSL Products
4. **Status:** Status shown is **Graced**.

Then click **Search** button.

View Billing History

You can view complete billing history of your customers.

To view billing history navigate to the following path:

 Navigation: Home » My Provider » Billing Information » Billing History

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

1. **Doc. Num:** Enter the document number.
2. **Document Type:** Select the document type.
 - i. Invoice
 - ii. Payment
 - iii. Credit Adjustment
 - iv. Debit Adjustment

The following listing will be shown

1. **Doc. Num:** It displays the document number.
2. **Document Type:** It displays the document type.
3. **Document Date:** The date on which it is created.
4. **Total:** It displays the total.
5. **Balance:** It shows the balance amount.

Pay Bills

To view Pay Bills you have to navigate to the following path:

 Navigation: Home » My Provider » Billing Manager » Pay Bills

It shows the following listing:

1. **ID:** It shows the ID.
2. **Type:** It displays the type of the invoices.
3. **Total:** It displays the amount in USD.
4. **Balance:** It displays the balance.
5. **Due Date:** It displays the date which is due for payment.

To continue click **continue** button.

Pay Invoices

1. **Invoice documents to pay:** It displays the number of invoice documents to pay.
2. **Total:** It shows the amount.

Payment Method: Select one of the methods:

- a. Credit Card
- b. Pay by Cheque
- c. Pay by Draft

Payment Information

1. **Name on Credit Card:** Enter the name on the credit card.
2. **Credit card number:** Enter the credit card number.
3. **Credit Card Type:** Enter the type of the credit card.
4. **CVV2 or CVC2 code:** CVV2 Code is located on the back of MasterCard, Visa and Discover credit or debit cards and is typically a separate group of 3 digits to the right of the signature strip.
5. **Issue number (Solo/Switch Only):** Enter the issue number.

After finishing this click **Make Payment** button.

Payment Profiles

To view payment profile you have to navigate to the following path:

 Navigation: Home » My Provider » Billing Manager » Payment Profiles

To add a new credit card click on **Add Credit Card** button.

Credit Card Information

1. **Cardholder name:** Enter the name of the card holder.
2. **Card Number:** Enter the card number.
3. **Expiration month:** Select the expiration month for the credit card.
4. **Expiration year:** Select the expiration year.
5. **CVV2 or CVC2 code:** CVV2 Code is located on the back of MasterCard, Visa and Discover credit or debit cards and is typically a separate group of 3 digits to the right of the signature strip.
6. **Issue number (Solo/Switch Only):** Enter the issue number.
7. **Allow payment by this card:** Select Yes or No .
8. **Use this card for recurring payments:** Select Yes or No .

Then fill out the **Credit Card Billing Address** information and click on **Save** button.

1. **Address:** Provide address
2. **Zip Code:** Provide zip code
3. **Phone:** Provide phone number.
4. **Email:** Provide email.

My Tickets

To view My Tickets navigate to the following path:



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

1. **Ticket Number:** It shows ticket number.
2. **Subject:** It shows subject.
3. **Department:** It shows 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:



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.

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.