



# User's Guide

## Provider Control Center



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## Preface

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

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## Document Conventions

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






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## Provisioning System



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

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

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

	Shared hosting, virtual private servers
	Hosted Exchange Extension (2010 Standalone & Hosting, 2013)
	SharePoint Extension (SP 2010 Multi-tenant & 2013)
	BlackBerry Extension (BES 5, BES 10)
	Dynamics Customer Relationship Management (CRM 4.0/2011)



	Hosted Lync Server ( 2010, Hosting Pack & 2013)
	Hosted VPS Server (Windows Server 2008 R2\2012 Hyper-v)

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## Control Panels

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

- **Provider Control Center (PCC):** This is a web based control panel for the web hosting service provider. PCC allows the service provider to setup, manage, run and monitor his hosting business from single web interface and for this it provides tools and applications.
- **Reseller Control Center (RCC):** This web based control panel provides tools and applications for the reseller user. It includes products management, billing and online store-front.
- **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.

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## Advantages

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

### Services you can deploy and manage with Control Panel

Domain name registration	Reseller Hosting (Hostmatic, Exchange, SharePoint etc.)
Shared web Hosting (Hostmatic, Plesk)	Dedicated server hosting
SharePoint Hosting	CRM Hosting
Exchange Hosting	SSL Certificates
Wireless Services hosting	Database Hosting
Microsoft Lync Hosting Services	Miscellaneous
VPS Hosting Services	

### Complete Automation & Management

Powerful domain management tools	IP Address allocation and management
Integrated help desk system	Self-provisioning tools
Automated maintenance	Much more...

## Integrated billing system

Configurable billing system	Customizable invoices
Taxation and tax exemption	Upgrade/Downgrade billing
Credit card management	Virtual terminal
Anti-Fraud filters and plug-ins	Billing reports
Sensitive data stored encrypted	Refunds, Reversals, Credit Support

## Automated credit card processing

Supporting over 5 payment processors	Get your own card processor integrated
--------------------------------------	--

## Domain registration automation

Supporting major domain registrars	Advanced domain management tools
Automated domain registration	Automated renewals and transfers
Manage domain information, WHOIS, Name Servers etc	

## Easy customization and integrations

Customizable Control Panel Logo	Customizable store front
Notifications can be customized	Easy color customization
Layout Settings i.e. Theme & Menu settings	Built-in Modules Configuration

## Multilingual, localization support

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

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## Control Server

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

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

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## Remote Server

Panel Remote Server consists of Panel Provisioning Service which is responsible to actually provision services (Windows SharePoint Services , Exchange Service, BlackBerry, Lync & VPS etc.).

Panel extends its functionality through Enterprise Extensions e.g. (Hosted Exchange Extension, SharePoint Extension, BlackBerry Extension etc.). Remote servers running Enterprise Software are provisioned using Panel Provisioning Service.

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## Services

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

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

- **Help Desk Service:** Manages Ticketing System and exhibit notifications as configured.
- **Provisioning Service:** Extends its functionality through Enterprise Extensions e.g. (Hosted Exchange Extension, SharePoint Extension, BlackBerry Extension etc.) Remote servers running Enterprise Software are provisioned using Provisioning Service.
- **Network Service:** This is responsible for network monitoring and management.
- **Billing Service:** Payments/Documents/Invoices and terminations/emails/notifications are handled through Billing Service.
- **License Service:** It communicates with the Licensing Server to activate/upgrade the licenses and is used for License Management. This service should run all the time.

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## Overview

There are two types of client accounts:

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

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

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## Customers

### Customer

#### Customers

To view customers navigate to the following path:



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

There are three buttons:

- **New Customer:** New customer is created by clicking on **New Customer** button.
- **Export to Excel:** You can also export the customer information to excel.
- **Import Customers:** You can Import more than one customer by clicking on this button.

Existing customer can be searched with the following fields:

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

#### Customers List Tab

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

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

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

#### Access Template Tab

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

##### Access Template:

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

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#### How to

Create a Customer

A customer account can be created in two ways.

**Using Off-line Order Form:** Off-line form is a convenient way for provider to add new customer account or to add subscriptions to existing client accounts.

**Using Online Store:** Online store (order form) is configured in Control Panel and deployed on your website. See [setting up order forms](#).

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



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

and select **End Customer** from the drop down list. Select customer **Ownership**. Fill in the following fields under *Customer Login Information* section:

- **User name (e-mail address):** Provide User name or email address.
- **Password:** Provide password.
- **Confirm password:** Retype password.

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

- **First Name:** Provide customers first name.
- **Last Name:** Provide customer last name.
- **Company name:** Provide company name.
- **Address:** Provide address.
- **City:** Provide city name.
- **State:** Provide state name
- **Zip:** Provide zip code.
- **Country:** Provide country name.
- **Phone:** Provide phone number
- **Mobile:** Provide mobile number.
- **Fax:** Provide fax number.
- **Alternate email:** Provide alternate email.
- **Locale:** Select locale.
- **Access Template:** Select access template.

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

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Delete a Customer

What's get deleted?

- Subscriptions
- Products/Services
- Domains
- Invoices
- Transactions
- Support Tickets

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



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

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

## Import Customers

To import customers navigate to the following path:



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

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

- **Owner:** select owner from the drop down list.
- **Access Template:** Select the access template from the drop down list.
- **Locale:** Select the locale from the drop down list.
- **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.

## Reseller Customers

### Reseller Customers

A Reseller customer can:

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

To create a reseller customer navigate to the following path and click on **New Reseller** button:



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

It shows the following listings:

1. **Name:** This is the name of the reseller.
2. **Email:** This is the email address of the reseller. For e.g. John@example.com.
3. **Status:** Indicates current status of the subscriptions.
  - **Active:** Indicates a completed subscription with order paid and service provisioned.
  - **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.
  - **Fraud:** The subscriber have the case of fraud. It can be added to **black list**.
  - **Deleted:** The subscription is expired and deleted. No further operations are possible on this subscription.

### Resellers List Tab

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

- **ID:** This is the reseller's unique id.
- **Name:** This is the name of the reseller.
- **Company Name:** This is the company name .
- **Owner:** This is the owner. It is provider in case of the reseller.
- **Country:** This is the country of the reseller.
- **Options:** In the options column a reseller can subscribe a service by clicking on the
  1. Subscribe as a reseller (If he wants to sell hosting services).
  2. Subscribe Service (if he wants to be an End customer).

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

- Upon deletion, all the customer and their subscriptions inside of the reseller will be terminated.
- Upon suspension, the reseller will not be able to login to the control panel anymore.

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

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

## Access Template Tab

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

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

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## Creating a Reseller Customer

To create a reseller customer navigate to the following path and click on **New Reseller** button:



Navigation: Home » Customer Manager » Customers » Reseller Customers

Or navigate to the path and select reseller customer from the drop down list:



Navigation: Home » Customer Manager » Offline Order

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

- **User name (e-mail address)** : Provide Username or email address.
- **Password:** Provide password.
- **Confirm password** : Retype password.

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

- **First Name:** Provide customers first name.
- **Last Name:** Provide customer last name.
- **Company name:** Provide company name.
- **Address:** Provide address.
- **City** : Provide city name.
- **State** : Provide state name
- **Zip:** Provide zip code.
- **Country:** Provide country name.
- **Phone:** Provide phone number
- **Mobile:** Provide mobile number.
- **Fax** : Provide fax number.
- **Alternate email** : Provide alternate email.
- **Locale:** select locale.
- **Access Template** : Select access template.

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

- **Web URL:** Provide web URL.
- **Address1:** Provide address.
- **City:** Provide city.
- **State:** Provide state.
- **Zip:** Provide zip code.
- **Country:** Provide country name.
- **Phone:** Provide phone number.
- **Fax:** Provide fax number.
- **Billing phone:** Provide billing phone number.
- **Sales phone:** Provide sales phone number.
- **Support phone:** Provide support phone number.
- **Billing Email:** Provide billing email.
- **Sales Email:** Provide sales email.
- **Support Email:** Provide support email.
- **Billing Signature:** Provide billing signature.
- **Sales Signature:** Provide sales signature.
- **Support Signature:** Provide support signature.

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

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

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## How to

### Customer Detail

To view customer detail navigate to the following path:



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

To view reseller customer detail navigate to the following path:



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

Then click on the customer/reseller customer name.



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

The following tabs are shown:

**Summary:** The operations column consists of the following buttons.

- **Login to Control Panel:** You can Login to the customer/reseller customer panel.
- **Suspend:** You can suspend the customer/reseller customer.
- **Delete:** You can delete the customer/reseller customer.
- **Email Customer:** You can Email to customer/reseller customer.

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

1. **Personal Info:** This will show the info of the customer/reseller such as account access,primary contact, etc.



2. **Contacts:** You can add contact to the customer/reseller by clicking on the **Add Contact** button.
3. **Billing:** Here you can generate invoice by clicking on the **Generate invoice** link, and can also make new credit adjustments by clicking on the **New credit adjustment** button.
4. **Payment profiles:** You can add credit card to your customer/reseller account by clicking on the **Add Credit Card** button.
5. **Subscriptions:** You can view a subscriptions of the customer/reseller and subscribe more services for that customer/reseller by clicking on the **Subscribe Service** button or **Subscribe as Reseller** button.
6. **Permissions:** You can update the permissions/access templates.

**Note:** All the for the tabs for the reseller customer are the same. But you can also **white label** the reseller customer.

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## Access Templates

To view customer detail navigate to the following path:



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

To view reseller customer detail navigate to the following path:



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

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

It shows the following listing:

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

Then click on **Add Template** button.

**Access Permissions Name:** Enter the name of Access permission.

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

- Allow package Upgrade/Downgrade
- Allow to purchase addons
- Allow edit profile
- Allow more services purchase from control panel

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## Subscribe service for existing customer

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



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

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



Navigation: Home »Customer Manager » Customers » Customer Details

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

**Note:** Same is applicable to Reseller Customers.

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## How to add Contact to Customer/Resellers

To view customer detail navigate to the following path:



Navigation: Home »Customer Manager » Customers

To view reseller customer detail navigate to the following path:



Navigation: Home »Customer Manager » Reseller Customers

Then click on the customer/reseller customer name.



Navigation: Home »Customer Manager » Customers » Customer Detail

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

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

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

- **First Name:** Enter first name of the customer.
- **Last Name :** Enter last name of the customer.
- **Address1:** Enter Address.
- **City :** Enter the City name
- **State:** Enter the name of the state.
- **Zip :** Enter zip or postal code.
- **Country:** Enter the name of the country.
- **Phone:** Enter the phone number.
- **Mobile :** Enter the mobile number.
- **Fax:** Enter the fax number.
- **Email Address:** Enter Email address.
- **Allow Access to Control Panel:** Check if you want to allow access to control panel for this Customer /Reseller.

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## How to 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 » Customer

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

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## How to Adjust Account Properties

Control Panel maintains complete client account information to help service provider organize and understand clients. Customer account properties are divided in several tabs, namely:

- **Summary:** This tab shows account, billing, subscriptions, domains and help desk summaries along with account notes recorded by system.
- **Personal Info:** This tab lets you change account password and edit personal profile.
- **Billing:** This tab shows all orders placed by this account and all the financial documents are listed here.
- **Payment Profile:** This tab lists credit cards on file for this account. Here you may add/edit/remove credit cards.
- **Subscription:** This tab shows all the services/products purchased by this account and their status.

To adjust account properties navigate to the following path:



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

Click on the client name you wish to manage.

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## Subscriptions Management

### Overview

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:

- Domain subscription
- Shared Hosting subscriptions
- Miscellaneous subscription
- Dedicated server subscription
- SSL certificate subscription
- Microsoft Dynamic CRM subscription
- Microsoft hosted Exchange subscription
- Microsoft hosted SharePoint subscription

## Viewing Subscription

To view a subscription navigate to the following path:



**Navigation: Home » Customer Manager » Subscriptions List**

The Subscription List section allows you to see all the subscriptions under the provider on the panel. You will only see list of subscriptions that are directly under the customer of provider. You will not see subscriptions of customers that are under any reseller.

You can filter the list of subscriptions based on following fields:

- **Subsc.ID:** You can search for a specific subscription based on the subscription ID.
- **Customer ID:** You can search for list of all the subscriptions for a specific customer ID.
- **Customer Name:** You can search for list of all the subscriptions for a customer name.
- **Domain Name:** You can search for the subscription based on domain name.
- **Service Type:** You can search for list of all the subscriptions based on the service type i.e. all exchange subscriptions etc.
- **Status:** You can search for list of all the subscriptions based on status i.e. active, deleted, on-hold, pending, graced or expired.

Subscription list view shows following details for each subscription.

- **Subsc. ID:** This is unique ID assigned to the subscriptions.
- **Subscription Name:** This is the subscription name.
- **Service Type:** This indicates the type of service this subscription is created for.
- **Package:** This is the package.
- **Customer:** This is the client for whom this subscription is created.
- **Status:** Indicates current status of the subscriptions.
  - **Active** - Indicates a completed subscription with order paid and service provisioned.
  - **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.
  - **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.
  - **Graced** - Indicated an expired subscription which is given grace period before deletion.
  - **Expired** - The subscription has been expired.
  - **Deleted** - The subscription was expired and later deleted. No further operations are possible on this subscription.

## Subscription List

Navigate through the following path:



**Navigation: Home » Customer Manager » Subscriptions List**

Subscribed customer can be searched by filling the following fields:

- **Subsc.ID:** Subsc.ID is the subscribed id For e.g. 9
- **Customer ID:** Customer ID is the customer identification.
- **Customer Name:** This field is for the customer's name.

- **Domain Name:** Domain name can be as For example: *www.google.com*
- **Service Type:** Service types can be Domain names, Shared Hosting, Misc.Products, Dedicated Servers, SSL Products, Dynamis CRM Hosting, Microsoft Exchange and All.
- **Status:** Status can be selected from the drop down list e.g. all, active, on-hold, fraud, pending, graced or expired.
- **Trial:** Trail drop down list contains trial, paid or all.

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## 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.



**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 below mentioned sections:

- **Operations:** You can perform operations like Services Management, Generate Renewal Invoice, Cancel Subscription, Upgrade & Downgrade and Fix Security Permissions.
- **General:** Shows general information about the subscription.
- **Service Summary:** Shows the service summary of the subscription i.e. status and the provider type.
- **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:

**Operations:** You can perform operations like **Edit Resources**.

**Limits:** It shows the following listings:

- Resource name
- Allocation
- Net Allocation
- Utilized
- 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:

- **Doc. Num:** It shows the number of the document.
- **Document Type:** It shows the type of the document.
- **Total Balance:** It displays the balance in specified currency.
- **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 and Mail Domains tabs along with General Info, Resources, Add-ons and Billing tabs.
5. For **Lync Subscription**, you will see Lync Organizations tab along with General Info, Resources, Add-ons and Billing tabs.
6. For **VPS Subscription**, you will see VPS Servers and IP Settings tabs along with General Info, Resources, Add-ons and Billing tabs.

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## How to

### How to Terminate 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.

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### How to Generate Renewal Invoice

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



**Navigation: Home » Customers Manager » Subscription**

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

## How to Fix Security Permissions

To fix security permissions on 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 **Fix Security Permissions** button.

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## How to Generate Subscription Renewal Order

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

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



**Navigation: Home » Customers Manager » Subscriptions List**

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

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## Offline Order

### Offline Order

## Offline Order Form

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



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

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

## Reseller:

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

## End Customer:

- 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 detail [Click Here](#).
- To subscribe services for existing customer [Click here](#).

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

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

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## Overview Billing

The concepts involved are the following:

- [Document](#)
- [Invoice](#)
- [Invoice Status](#)
- [Payment](#)
- [Payment Status](#)
- [Credit](#)
- [Refund](#)

## Document

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



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

## Invoice

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





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

## Invoice Status

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

Status	Description
1. Due	Payment is yet not made for the stated invoice.
2. Partially Paid	A part of total amount is paid for the stated invoice.
3. Paid	Total amount is paid for the stated invoice.
4. Cancelled	Invoice is cancelled due to some reason.
5. Deleted	Invoice is deleted due to some reason.
6. 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
1. Completed	Payment document was created, payment is received and account has been provisioned.
2. Open	The payment document was created, payment is received but the account is not yet provisioned.
3. Refund	Payment document has been refunded.
4. On-Hold	Payment document is on-hold.
5. Cancelled	Payment document has been cancelled.
6. Pending	Payment document was created and waiting to receive the payment.
7. 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 and 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

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## Documents

### Invoices

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

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



Navigation: Home » Billing Manager » Documents » Invoices

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

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

- **Doc. Num:** Doc Num is number of the document. It is unique.
- **Document Type:** It shows that it is an invoice.
- **Document Date:** It displays the date on which the invoice is created.
- **Customer ID:** It is the customer id.
- **Customer Name:** It is the customer name.
- **Total:** It shows the total amount for an invoice.
- **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

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## Payments

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

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



Navigation: Home » Billing Manager » Documents » Payments

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

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

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

Click on Doc Num or navigate to the following path:



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

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

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## Credits

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

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



Navigation: Home » Billing Manager » Documents »Credits

**Credits** can be searched by filling in the following fields:

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

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

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

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



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

The following tabs are shown:

**Details:** Details tab provide you customer's information.

**Invoices Paid:** It shows the invoices that are paid

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## Refunds

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

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



**Navigation:** Home » Billing Manager » Documents » Refunds

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

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

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

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## Account Statement

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

with the maximum consistency and integrity.

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



**Navigation: Home » Billing Manager » Statements**

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

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

- **Customer ID:** Enter the customer ID.
- **Customer Name:** Enter the customer name.
- **Email:** Enter email address.
- **Payment Group:** Select the currency.

It shows the following listing:

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

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



**Navigation: Home » Billing Manager » Statements » Statement Details**

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

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

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## Online Payments

### Online Payments

#### 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:



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

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## Viewing On-Hold Payments

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

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



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

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## Viewing Authorized Only Payment

Online businesses are now being preferred then other means of businesses yet making an online transaction, a person may think the validity of the business or any other stimuli which could constitute towards a trustful transaction. Thus, to ensure such constraints and depending upon your requirements and/or nature of business, you may be only Authenticating an online transaction rather actually manipulating or charging the credit card.

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



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

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## Viewing Pending Payments

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:



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

## Viewing Fraud Payment

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

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



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

## Credit Card

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

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



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

It shows the following listings:

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

## Viewing Transaction Logs

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

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



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

Following are the different status of the credit cards.

- **Pending:** Transaction is not processed yet no attempt made for charge from credit card.
- **Authorized:** Authorized means credit card owner authorized the payment.
- **Auth-call:** It verifies that the credit card owner does have enough money in his account to pay bills.
- **Cancelled:** Transaction cancelled due to some reason.
- **Refunded:** Partially or fully amount refunded back to the credit card.

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## Issue Credit

### 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:



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

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

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

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## Adjusting Customer Balance

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



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

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

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## 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:



**Navigation: Home » Billing Manager » Register Payments**

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

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## Help Desk Concepts

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

The concepts involved are the following:

### Active Ticket

Active ticket is a ticket waiting for a technician attention.

### Waiting Ticket

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

### Closed Ticket

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

### Agent User

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

### Departments

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

### Email Parser

Email parser scans mailboxes and creates tickets out of emails.

## Tickets

### Viewing Tickets

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



**Navigation:** Home » Help Desk » Tickets

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

- Reply/update ticket
- Transfer ticket to another department
- Change ticket status (active/waiting/closed)
- Delete ticket

### New Ticket

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



**Navigation:** Home » Help Desk » Tickets

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

Fill in the following fields:

- **Customer:** Select the corresponding customer.
- **Subject:** Specify subject that would appear as subject of the ticket.
- **Department:** Select relevant department from available options.
- **Priority:** Set the priority based upon the importance of the issue e.g. urgent, normal or low.
- **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.
- **Message:** The body of the message goes here.

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

## Search Ticket

You may search for a ticket by

- Ticket number
- Sender email
- Ticket subject

To search for a ticket navigate to following menu:



**Navigation: Home » Help Desk » Tickets**

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

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

and click on **Search** button.

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## Actions

### 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).

- **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.
- **UnStick Ticket(s):** UnStick is to release stick option so that ticket is put into regular order in the ticket list.
- **Delete Ticket(s):** Allows you to delete the selected ticket(s).
- **Block E-mail:** Allows you to block the email address from which the ticket was received.
- **Change Status To:** Allows you to change status of selected ticket(s). You can change the statuses to Active, Waiting, Closed or Cancelled.
- **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.
- **Assign Ticket To:** Allows you to assign the ticket to specific help desk agent user.

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## 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**

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## Block Email

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



**Navigation: Home » Help Desk » Tickets**

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## Help Desk Users

### Managing Agents

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

#### How to add a staff member

To add a staff member navigate to following path:



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

Make sure that you assign "Help Desk Administrator" role to the staff member.

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



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

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

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## Managing Help Desk Agents

### Agent User

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

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



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

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

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



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

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



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

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

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

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

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### Set Support Signature

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



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

## Departments

### Managing Departments

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

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



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

#### How to customize department's email?

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

- Confirmation of posting ticket
- Ticket updated notification
- Ticket assigned notification
- Ticket forwarded notification
- Ticket closed notification
- Ticket Auto closed notification
- Challenge Response

To customize these template navigate to following path.



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

## How to Add Department

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



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

Fill in the following fields:

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

- **Admin Access:** Choose the Agent User as administrator of the department.

Then, click on **Save** button.

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

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## Email Confirmations

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



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

This page will display the following listing:

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

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## Settings

### General Settings

#### Challenge Response

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

#### How it works?

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

To configure challenge response system navigate to following path:



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

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

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## Manage Status

Statuses regarding particular tickets can be manipulated from here:



Navigation: [Home](#) » [Help Desk](#) » [Settings](#) » [General Settings](#) » [Manage Statuses](#)

Following parameters are displayed:

- **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.

Customized statuses can be created putting in the Status Title and clicking on Save button.

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

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

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## Manage Priorities

Priorities regarding ticket can be manipulated from here:



Navigation: [Home](#) » [Help Desk](#) » [Settings](#) » [General Settings](#) » [Manage Priorities](#)

Following parameters are displayed:

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

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

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



Navigation: [Home](#) » [Help Desk](#) » [Settings](#) » [General Settings](#) » [Manage Priorities](#)

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

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## 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:

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

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

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

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

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## Email Parser

### 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 support@xyzhost.com email address you may configure it in email parser so that whenever an email is received at this address a ticket is automatically generated for an existing customer account.

To configure email parser navigate to following path:



Navigation: Home » Help Desk » Settings » Email Parser » POP3 Accounts

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

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

You can edit POP3 account by clicking on **Edit** link and provide the information.

#### Processing Rules

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

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

To create processing rule navigate to following path:



Navigation: Home » Help Desk » Settings » Email Parser » POP3 Rules

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

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## POP3 Rules

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

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

To create processing rule navigate to following path:



**Navigation: Home » Help Desk » Settings » Email Parser » POP3 Rules**

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

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

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## Overview

This is the most important section of control panel which presents the provider with various options through different sections and interfaces.

Following key aspects form the basis of the Service Queue:

- You can **Add Servers** and **Server Groups** to the control panel which you want to manage and provision services on.
- You can **Manage Organizations** and **Users**.
- You can configure and later **Manage Services** like **Shared Web Hosting, Exchange Hosting, SharePoint, Wireless, CRM, Lync and VPS** etc.
- You can view reports like **SPLA Report** and **Usage Report**.
- You can Perform **Group Actions** of all sorts collectively on selected exchange mailboxes.
- You can work with **Dedicated Servers, Domain Names, IP Addresses** etc.
- You get the central point of action i.e. the **Service Queue** where all actions are listed that require intervention or that are to be processed by the control panel automatically.

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## Service Queue

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

To view Service Queue navigate to the following path:



Navigation: Home » Service Director » Service Queue

The **service queue** tab displays following:

- **Command:** Shows the task in the queue. It is usually in the following format:

Action name: Account Name (Provider Name)

So, if you see command *"Renew Domain: somedomain.com (eNom)"* then you understand that this is domain renewal with eNom provider.

- **Status:** Indicates the current status of the command.
  - .2.**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.
  - .3.**Error:** Indicates an error condition during the provisioning. Click on it to see the error detail.
- **Date Entered:** The date when item entered in the queue.
- **Tries:** Total number of tries to provision the service automatically.
- **Last Tried:** The date/time when service was last tried.
- **Customer ID:** The customer id.
- **Customer Name:** The customer to which the service belongs.
- **Reactive:** Click on reactive to active the service.
- **Run:** Click on this button to attempt to provision service.
- **Control:** Click on this button to manually provision a service. This is very useful in two scenarios:
  - **Manual Provisioning:** For those services which cannot be provisioned automatically you can use **Control** button to provision. For example, Dedicated server provisioning.
  - **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.

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

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## Active Directory Management

### Overview

Control Panel lets you organize the active directory domains and perform advanced operations on them such as adding/removing organizational units (OU), users etc. Control Panel supports provisioning and management of hosted services spread across multiple independent active directories. You may add your active directory information which is later used when you are setting up enterprise hosting servers.

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## Domains

### Viewing Active Directories

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



**Navigation:** Home » Service Director » Active Directory » Domains

The list of active directory domains displays following:

- **Preferred Domain Controller:** This is the primary domain controller name.
- **Domain NetBIOS name:** The domain NetBIOS name is the NetBIOS name of the domain controller.
- **Edit:** Click on this link to edit active directory domain properties.
- **Remove:** Click to remove active directory domain. You cannot remove if there are active servers with active subscriptions.

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### Add Active Directory Domain

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



**Navigation:** Home » Service Director » Active Directory » Domains

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

- **Preferred Domain Controller:** Enter the preferred domain controller name. Example, ad01.fabrikam.com.
- **Domain FQDN:** Enter the active directory domain name, example Fabrikam.com.
- **Domain NETBIOS Name:** Enter domain controller's NetBIOS name, such as Fabrikam.
- **Domain Administrator Login:** Provide here the login for the domain administrator account. It is recommended that you setup a special domain administrator account to use with Control Panel. When setting up domain administrator account, following points must be noted:
  - Do NOT Use default Administrator account. Create a new Domain Administrator such as 'Administrator2' and set here. If you use default administrator account this may result in problems later on when you modify password of the account. You will need to change the password in the control panel as well and sync with all remote servers again, otherwise you will loose connectivity with the remote servers.
  - Make the domain administrator;administrator2 member of Domain Admins, Enterprise Admins, Exchange Servers, Exchange Organization Administrators, Group Policy Creator Owners, Schema Admins, Exchange Trusted Sys-System group for Exchange 2010 and local Administrators groups.

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## Organization

### 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:



Navigation: Home » Service Director » Active Directory » Organizations

To search an active directory organization:

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

Then, click **Search** button.

It displays the following listing:

- **Organization Name:** It is the name of the organization.
- **Users:** It displays the number of users in organization.
- **Active Directory Domain:** It is active directory domain name under which this organization exists.
- **Customer:** It is name of the customer who owns the organization.
- **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.
- **Options:** To remove organization, click **Remove** link.

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## Add Active Directory Organization Unit

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



Navigation: Home » Service Director » Active Directory » Organizations » Add Active Directory Organization

It displays the following listing:

- **Active Directory:** Select active directory from the drop down list.
- **Parent OU LDAP:** LDAP will be displayed where the new OU will be created.
- **Customer:** Select name of the customer who will own the OU.
- **Organization Name:** Enter organization name or OU.
- **Domain Name:** This must be a valid registered and active domain.
- **Description:** Provide description for the active directory organization.

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## Users

### Add Active Directory User

To add a new user navigate to the following path:



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

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

- **Customer:** Select customer from the drop down list.
- **Organization Unit:** Customer's organization unit will automatically be displayed.
- **User Display Name:** Enter user display name.
- **User Logon Name:** Enter user logon name.
- **User Principal Name:** Enter user principal name.

- **Password:** Enter password.
- **Confirm password:** Retype password.

Click to expand the *Optional Settings*:

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

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## Data Centers

### Overview

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

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



**Navigation: Home » Service Director » Data Centers**

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



**Navigation: Home » Service Director » Data Centers » Data Center Detail**

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

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## Data Centers

### Data Center Management

For viewing data centers you have to navigate to the following path:



**Navigation: Home » Service Director » Data Centers**

Data centers can be modified or deleted by clicking on **edit** or **remove** link respectively.

Click on **Add Data Center** button to include a new data center at following navigation path:



Navigation: Home » Service Director » Data Centers » Add Data Center

## Add New Data Center

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

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

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## View Data Centers

For viewing data centers information navigate to following path:



Navigation: Home » Service Director » Data Centers

Following fields are shown:

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

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

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

## Edit Data Center Information



Navigation: Home » Service Director » Data Centers » Edit Data Centers

It shows the following listing:

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

Then click on **Save** button

## Racks

### Racks Management

For viewing racks information navigate to following path:



**Navigation:** Home » Service Director » Data Centers » Racks

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

Click on **Add New Rack** button to include a new rack at following navigation path:



**Navigation:** Home » Service Director » Data Centers » Racks » Add Racks

Following fields are shown:

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

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

### View Racks

For viewing racks information navigate to following path:



**Navigation:** Home » Service Director » Data Centers » Racks

Following fields are shown:

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

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



## Switches

### Switches Management

For viewing switches information navigate to following path:



**Navigation:** Home » Service Director » Data Centers » Switches

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

Click on **Add Switch** button to include a new data center at following navigation path:



**Navigation:** Home » Service Director » Data Centers » Switches » Add Switches

Following fields are shown:

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

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

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### View Switches

For viewing switches information navigate to following path:



**Navigation:** Home » Service Director » Data Centers » Switches

Following fields are shown:

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

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

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## Web Hosting

### Server Groups Management

#### Overview

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

#### Example:

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

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

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#### Server Groups

View Server Groups

To view hosting server groups navigate to the following path:



Navigation: **Home » Service Director » Web Hosting Servers » Server Groups**

The list of server groups displays following:

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

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Viewing Server Group Members

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



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

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

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

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How to

Server Group Management

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



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

**Note:** You can also edit existing Server Group by clicking on **Edit** link.

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

- **Server Group Name:** This is the friendly name of the server group. For example, *Premium Resellers*.
- **Provider:** Select the hosting panel provider for this group.
- **Fill Style:** Select from one of the two options.
  - Least Filled First: Setup hosting on the group member which is least filled.
  - One-by-One: Setup hosting on group members in circular manner.
- **Purpose:** Select the type of service this server group provisions. You may restrict a server group to provision only Shared Hosting or Reseller Hosting or Both.
- **Enabled:** If unchecked, system will not provision any accounts on the server group members.

Click **Next** button to proceed to step-2. Now you will be prompted to add a server group member.

- **Reference ID:** This can be any internal ID you want to assign.
- **Datacenter:** Select the datacenter where server is located.
- **Rack:** Select Rack or N/A if not applicable.
- **Switch:** Select Switch or N/A if not applicable.
- **Server IP:** This the IP of the server. It must be a live connectable IP.
- **Administrator Login:** System takes administrator login in order to enable you to remotely manage this server via Network Eye module.
- **Administrator Password:** Enter administrator account password.

**IMPORTANT:** When you click Next the system may take a while since, it will be trying to validate the administrator login/password and connectivity.

Click on **Finish** button.

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## Server Group Member Management

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



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

**Note:** You can also edit existing Server Group member by clicking on **Edit** link.

Click on **Add Group Member** button in front of desired server group.

- **Reference ID:** This can be any internal ID you want to assign.
- **Datacenter:** Select the datacenter where server is located.
- **Rack:** Select Rack or N/A if not applicable.
- **Switch:** Select Switch or N/A if not applicable.
- **Server IP:** This the IP of the server. It must be a live connectable IP.
- **Administrator Login:** System takes administrator login in order to enable you to remotely manage this server via Network Eye module.
- **Administrator Password:** Enter administrator account password.

**IMPORTANT:** When you click Next the system may take a while since it will be trying to validate the administrator login/password and connectivity.

Click on **Finish** button.

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How to

To add services navigate to the following path:



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

Click on **Services** link under **Options** this will open new tab called **Services**. Click on **Add Service** button to add a service.

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

Web	FTP	Mail	DNS	Databases	Web stats
IIS 6	Microsoft FTP (IIS 6)	MailEnable	Microsoft DNS	SQL Server 2000	SmarterStats
IIS 7	Gene6 FTP Server	Merak Mail Server 9.2.1	Simple DNS Plus	SQL Server 2005	
	Filezilla FTP Server	SmarterMail 5.x		SQL Server 2008	
	Microsoft FTP 7.5 (IIS 7.5)	SmarterMail 6.x		MySQL 5.1	
		SmarterMail 8.x			

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## Hosting Accounts

### Hosting Accounts

Hosting accounts section lets you view all the hosting accounts in the system under the provider's customers. To be able to view hosting accounts under the reseller, you will need to login as a reseller first and then navigate to same path to view the hosting accounts for customers under the respective reseller.

To view Hosting accounts, navigate to the following path:



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

Key benefit of this section is that it filters out all the hosting accounts on single interface and you can manage any of the hosting account by clicking on the **Service Management** link against the desired domain name.

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

The list displays the following:

- **Subscription ID:** This is unique ID assigned to the subscriptions.
- **Domain Name:** Specifies the name of corresponding domain.
- **Node:** Specifies the node.
- **Customer ID:** It displays the customer ID.
- **Customer Name:** It displays the customer name.
- **Company Name:** It displays the name of the company.
- **Options:** Click on **Service Management** link to manage server service.

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### Service Management

Hostmatic Overview

Click on the **Service Management** link 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:



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

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



**Navigation:** Home » Service Director » Web Hosting » Hosting Accounts » Service Management

**Service Management** page shows various management options, each with a unique display icon that helps the user identify the feature easily.

**1) 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.

**2) Domain Management:** Allows you to manage following aspects:

<b>Turn On/Off</b>	Lets you turn the domain On/Off.
--------------------	----------------------------------

<b>Sub-Domains</b>	Lets you add new sub domain and manage the existing ones.
<b>Domain aliases</b>	Lets you add new domain aliases or manage the existing ones.
<b>Limits</b>	Lets you manage quota limits for the domain.

**3) Hosting Management:** These are the detailed options available in Control Panel to let you manage all options associated with traditional hosting or shared web hosting. Below is list of options you can manage:

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

#### 4) Email Management:

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

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Domain Management

Domain Service Control

To view Domain Management section navigate to the following path:



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

Domain Management section allows you to manage following aspects:

- **Turn On/Off:** Lets you turn the domain On/Off in IIS.
- **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.

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Turn On/Off

You can stop or start a site in IIS using turn on/off feature by navigating to following path:



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

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Sub Domains

A sub domain is a domain that is part of a main domain. For example, "mail.fabricam.com" and "sales.fabricam.com" are sub domains of the "fabricam.com" domain, which in turn is a sub domain of the "com" Top Level Domain (TLD).

Sub domains can be viewed, added or modified as per requirement by navigating to following path and clicking on **Sub Domains** link:



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

Click on **Add Sub-domain** button to add a new sub domain.

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

Click on **Save** button when done.

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Domain Aliases

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

Domain aliases can be viewed, added or modified as per requirement by navigating to following path and clicking on **Domain Aliases** link:



**Navigation:** Home » Service Director » Web Hosting » Hosting Accounts » Service Management

Click on **Add Domain Alias** button to include more sub domains. Provide domain alias name. Click **Save** for changes to take effect. It shows the following listing:

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

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## Limits

You may want to apply limitation on the resources such as bandwidth, maximum domains, user accounts, scripting support limitation etc. You can do so by navigating to:



**Navigation:** Home » Service Director » Web Hosting » Hosting Accounts » Service Management

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.

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## Hosting Management

### Website Settings

You can configure website settings related to permissions, authentication, application pool and performance at:



**Navigation:** Home » Service Director » Web Hosting » Hosting Accounts » Service Management

Following options are available to be managed:

- **Read:** Set read permissions in IIS.
- **Write:** Set write permissions in IIS.
- **Directory browsing:** Allow browsing of directory structure.
- **Execute Permission:** Enable and allow execution of scripts/extensions.
- **Allow anonymous access:** Allows anyone to visit the public areas of website.
- **Enable Integrated Windows authentication:** Integrated Windows authentication does not initially prompt for a user name and password. The current Windows user information on the client is used for Integrated Windows authentication.
- **Enable basic authentication:** Collects user name and password and send in an unencrypted form.
- **Application Pool:** Name of the application pool that contains one or more applications run.
- **Maximum CPU Usage:** Mention percentage for peak utilization of System CPU.
- **Maximum Network Use (KB/S):** Enter network bandwidth usage.



- **Connection limited to:** Specify connection limitation.

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## Default Documents

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



**Navigation:** Home » Service Director » Web Hosting » Hosting Accounts » Service Management

Click on the **Default Documents** link to get to this option. Clicking on **Add New Document** will allow you to add up new default document that will now be supported. You can also delete an existing default document by clicking on **Delete** button.

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

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## URL Redirection

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



**Navigation:** Home » Service Director » Web Hosting » Hosting Accounts » Service Management

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.

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## 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:



**Navigation:** Home » Service Director » Web Hosting » Hosting Accounts » Service Management

Click on the **Custom Errors** link to get to this option. It displays the following listing:

- **Http Error:** It displays the HTTP Error.
- **Type :** It displays the type of response.
- **Contents :** It displays the content.
- **Default IIS Template :** It shows that the error is default or not.
- **Operation:** You can edit and set to default.

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

- **Status Code:** Provide status code.
- **Prefix Language File Path:** Provide language file path.
- **Path:** Provide path.
- **Response mode:** Select preferred response mode.
  - Absolute path
  - Executable path
  - URL

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

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## MIME Types

With Multipurpose Internet Mail Extensions (MIME), you can create file formats that will be used during e-mail exchange.

Navigate to following path for listing and adding MIME types:



**Navigation: Home » Service Director » Web Hosting » Hosting Accounts » Service Management**

Click on the **MIME Types** link to get to this option. You may add new MIME Type by clicking on **Add MIME Type** button.

- **Extension:** Enter file extension e.g. .doc, .txt, .mpg etc.
- **Content Type (MIME):** Specify type of content.

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## Virtual Directory

You can view/add virtual directory entries at:



**Navigation: Home » Service Director » Web Hosting » Hosting Accounts » Service Management**

Click on the **Virtual Directory** link to get to this option. New virtual directory can be created by simply clicking on the **Add Virtual Directory** button.

- **Name:** Enter the name of virtual directory you want to create.
- **Path:** Browse for the path of virtual directory.
- **Points To:** Select if you want it to point to a physical location on a hard drive/network or a web URL.
- **Permissions:** Set required permission/privileges as per your requirement.
- **Execute permission:** Allows permission to run scripts and executables.

Finally, click **Save** button to ensure changes are made.

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## Scripting

To enable scripting support navigate to the following path:



**Navigation:** Home » Service Director » Web Hosting » Hosting Accounts » Service Management

Following scripting languages are supported:

- ASP Support
- ASP.NET Support
- PHP Support
- Perl Support
- Python Support
- 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.

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## FTP Users

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



**Navigation:** Home » Service Director » Web Hosting » Hosting Accounts » Service Management

Click on **Add FTP User** to create a new FTP user.

- **FTP account name:** Specify name of FTP account.
- **Home directory:** Mention the path of home directory to use.
- **Password:** Enter the password for the corresponding FTP account.
- **Confirm Password:** Re-enter the same password for confirmation.
- **Read Permission:** Allow read rights.
- **Write Permission:** Allow write rights.

Clicking **Save** button will update changes.

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## Databases

You can add/remove/manage the Databases that are supported by the provider and configured under the Control Panel by navigating to following section:



**Navigation:** Home » Service Director » Web Hosting » Hosting Accounts » Service Management

Click on the **Databases** link to get to this option. Click on **Add Database** button to create another database.

- **Provider:** Select what type of database you version want to create .
- **Database Name:** Specify instance name for database.
- **Database User:** Add respective database user.
- **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.

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## ODBC DSN

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



**Navigation:** Home » Service Director » Web Hosting » Hosting Accounts » Service Management

Click the **Add ODBC DSN** button to add new ODBC DSN.

- **Data source name:** Enter string for data source.
- **Driver:** Specify your preferred driver for database connectivity.
- **Database name:** Name of database instance.
- **Database user:** Select respective database user.

For changes to take effect, click **Save** button.

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## Website Stats

To view website stats navigate to the following path:



**Navigation:** Service Director » Web Hosting » Hosting Accounts

Click on the **Service Management** link 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** link or **remove** link respectively.

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## DNS

For DNS configuration navigate to following path:



**Navigation: Home » Service Director » Web Hosting » Hosting Accounts » Service Management**

Click on the **DNS** link to get to this option. Click on **Add DNS Record** button to include a new DNS entry.

- **Record Type:** Select the type of resource record such as NS, A, MX, CName etc.
  - **NS:** Name Server records (NS) state the authoritative name servers for the given domain.
  - **A:** Address records (A) that map the name of a machine to its numeric IP address.
  - **MX:** MX (Mail exchanger) resource record identifies the mail server that is responsible for handling e-mails for a given domain name.
    - MX record must point to hosts defined by A records.
    - MX record cannot point to IP addresses.
  - **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.
  - **TXT:** Text information associated with a domain.
  - **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.
- **Name:** Specify the name of the node in the zone file to which this record belongs
- **FQDN:** A Fully Qualified Domain Name (FQDN) is the complete domain name for a specific host on the Internet.
- **TTL:** Type the default minimal Time To Live (TTL) in seconds.
- **Class:** A 16 bit value which defines the protocol family or an instance of the protocol. The normal value is IN = Internet protocol.
- **FQDN for target host:** A Fully Qualified Domain Name (FQDN) is the complete domain name for the target host.

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

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## SOA

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



**Navigation: Home » Service Director » Web Hosting » Hosting Accounts » Service Management**

Click on DNS link and then click on **SOA record** tab to view SOA records.

- **Refresh Interval:** Enter the refresh period, i.e. the frequency with which the data should be checked by a secondary name server.
- **Retry Interval:** The retry period, i.e. how often a failed attempt to connect should be retried.
- **Expire Interval:** How soon the data should expire if it hasn't been refreshed.

- **TTL:** The default minimal Time To Live (TTL) of the data.

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Email Management

Email Management

Please navigate to following path to access Email Management section:



**Navigation:** Home » Service Director » Web Hosting » Hosting Accounts » Service Management

Also by navigating to following path and choosing **Mail Domains** tab:



**Navigation:** Home » Customers Manager » Subscriptions List » Subscription Detail

Click on **Manage** link for desired mail domain to view detailed options for Email Management.

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Mail Domain Alias

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



**Navigation:** Home » Service Director » Web Hosting » Hosting Accounts » Service Management

It shows the following listing:

- **Mail Domain:** Displays the name of the mail domain.
- **Enable/Disable:** To activate and de-activate specific mail domain.
- **Manage:** Directs you to the interface for mail domain management.
- **Remove:** Discards the specific mail domain.

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

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Email Accounts

Please follow the below mentioned navigation path to view, create, remove and configure an e-mail account:



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

Email accounts list shows following details:

- **Display Name:** Display name of email account.
- **E-mail:** E-mail address assigned to e-mail account.
- **Size:** Disk space allocated for e-mail account.
- **Options:** Different choices to manipulate upon the e-mail account.

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

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

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

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## Email Groups

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

For enlisting and configuring e-mail groups navigate to:



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

Click on **Add Email Group** button.

Finally click **Save** button.

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## Email 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 » Hosting Accounts » Service Management

Click on **Email Lists** service control under **Email Management**.

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

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## Set Up

### Overview Hosting Setup

Navigate to the following path for Setup section related to shared web hosting:



**Navigation:** Home » Service Director » Web Hosting » Setup

Here you can manage different options like:

- Setup/modify the Parking Page.
- Setup/modify the Suspend Page.
- Configure Disk Quota calculation and Bandwidth calculation.

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### Create Parking Pages

This section allows you to modify the look and feel of existing parking page. Control Panel has built in HTML editor that allows you to modify the parking page. To modify parking page navigate to the following path:



**Navigation:** Home » Service Director » Web Hosting » Setup

Choose **Parking Page** tab to easily view and modify built in parking pages by clicking on **View** and **Edit** buttons respectively.

- **Parking Page Template Name:** The name of the parking page .
- **Type:** The type of the page.
- **File Name:** The name of the file.

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### Suspend Page

To view and modify Suspend Page navigate to the following path:



**Navigation:** Home » Service Director » Web Hosting » Setup

Choose **Suspend Page** tab to view following options:

- Suspend Page Name: It displays the name of the suspend page.
- Options: The following are the options:
  - View
  - Edit

You can easily view and modify built in Suspend pages by clicking on **View** and **Edit** links respectively.

- **Parking Page Template Name:** The name of the parking page .
- **Type:** The type of the page.



Click on **Save** button to save the changes when done.

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## Quota Settings

To set Quota Settings navigate to the following path:



**Navigation:** Home » Service Director » Web Hosting » Setup

Choose **Quota Settings** tab. It displays the following:

### Disk Quota calculation

- **Calculation interval:** Select interval in hours to specify the disk usage calculation interval.
- **Send email to:** If yes then select (When disk usage is reached allowed limit email alert will be send to a selected member).
  - .1.Customer only
  - .2.Owner only
  - .3.Both Owner and Customer
- **Automatic Suspend Service:** When disk is over the specified limit, the website service will be automatically suspended.
- **Automatic Resume:** When disk usage is back to normal limit, the website service will be automatically resumed.

### Bandwidth calculation

- **Calculation interval:** Select interval in hours to specify the bandwidth calculation interval.
- **Send email to:** If yes then select (When bandwidth usage is reached allowed limit email alert will be send to a selected member)
  - .1.Customer only
  - .2.Owner only
  - .3.Both Owner and Customer
- **Automatic Suspend Service:** When bandwidth is over used or reach to the specified limit, the website service will be automatically suspended.
- **Automatic Resume:** When bandwidth usage is back to normal limit, the website service will be automatically resumed.

Click on **Save** button when done.

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## DNS Manager

### DNS Templates

DNS templates are associated with services and used to provision DNS records. Control Panel provides you different DNS templates which you can modify according to your needs. To view/setup DNS templates you have to navigate to the following path:



**Navigation:** Home » Service Director » DNS Manager » DNS Templates

**Note:** Existing DNS templates can be modified by simply clicking on **Edit** link.

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

- **Template Title:** Title or name for the designated template.
- **Name:** Name of the node to which this record pertains.

- **Record Type:** Select the type of resource record such as NS, A, MX, CName, SRV etc.
  - **NS:** Name Server records (NS) state the authoritative name servers for the given domain.
  - **A:** Address records (A) that map the name of a machine to its numeric IP address.
  - **MX: MX** (Mail eXchanger) resource record identifies the mail server that is responsible for handling e-mails for a given domain name.
    - MX record must point to hosts defined by A records.
    - MX record cannot point to IP addresses.
  - **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.
  - **TXT:** Text information associated with a domain.
  - **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.
- **Class:** A 16 bit value which defines the protocol family or an instance of the protocol. The normal value is IN = Internet protocol.
- **Host:** Specify IP Address of server where service is provisioned or actual domain name using customization keys.

Click **Save** button to update changes.

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## Name Server

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



**Navigation:** Home » Service Director » DNS Manager » Name Server

**Note:** You can also edit existing Name Server Group by clicking on **Edit** link.

Following fields should be completed to search Names server:

- **Host Name:** Enter host name.
- **IP Address:** Enter IP address.

Then, click on the **search** button.

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

- **Name Server Group Name:** This is the friendly name of the name server group.
- **Name Server 1:** Enter the name for Name Server 1.
- **Name Server 2:** Enter the name for Name Server 2.
- **IP Address:** Specify the IP address of the designated Name Server.

Click **Save** button to proceed.

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## Add DNS Zone

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



**Navigation:** Home » Service Director » DNS Manager » 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.

To import DNS zones click on **Import DNS Zones** button.

- **Select server:** Select Server from the drop down list.
- **Select One HM-server:** Select the hostmatic server from the drop down list.

and click on **Get DNS Zone** button.

It displays the following listings:

- **Customer:** It shows the customer name.
- **Domain Name:** It shows the domain name.
- **DNS Server:** It shows the DNS server.
- **Options :** you can [manage you DNS zones](#) and remove the zones.

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## Exchange Hosting

### Overview

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

Control Panel Hosted Exchange Extension fully automates and controls service delivery on Microsoft Exchange 2007/2010(SP & SP2)/2013, manages billing and provides self service control panel to your customer.

**Note:** Please make sure you have subscribed to Hosted Exchange Extension 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.

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## Server Groups

### Overview

With Control Panel you may organize your Exchange server cluster in groups. The groups are particularly effective for segregating exchange servers based on their role or capacity. For example, you may want to reserve couple of servers for highly paid customers only. You can do this by creating a server group and then adding those servers to that group.

#### **Example:**

- Create a server group called **Corporate Customers**.
- Assign **Exchange Server 2010 Hosting/Non-Hosting** as the provider.
- Add 2 servers to this Server Group. These are actual servers where Exchange mailbox role is installed.
- Create a hosting plan "Corporate Gold Mail Hosting" and assign **Corporate Customers** group to this package.

**Note:** For Exchange 2010 hosting mode CAS server need to be installed.

Now, when you sell Corporate Gold Mail Hosting the Control Panel will automatically provision the hosted email service on one of the two member servers.

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## Exchange Server Groups Management

To view/manage exchange server groups navigate to the following path:



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

The list of server groups displays following:

- **Enabled:** Tick means Yes.
- **Server Group Name:** Friendly name.
- **Provider:** Indicates the Exchange server provider for this server group.
- **Add Group Member:** Click on this link to add a new member to the existing server group.
- **Disable:** To disable a server group click on disable link.
- **Edit:** Click on this link to edit server group properties.
- **Remove:** Click to remove server group. You cannot remove a server group if there are active servers with active subscriptions.

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## Exchange Server Group Members Management

To view/manage exchange server group members navigate to the following path:



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

Click on the **Server Group Name** link, a new tab **Exchange Hosting Servers** will open.

The list of server group members displays following:

- **Enabled:** Tick means Yes.
- **Server Name:** Friendly name of the server.
- **Test Service:** Click on Test service link to check that server are connected and integrated successfully.
- **Disable:** Click on this link to disable hosted email provisioning on the server. You may want to do this if server is down or it is full.
- **Edit:** Click on this link to edit server properties.
- **Remove:** Click to remove server from group. You cannot remove a server if there are active subscriptions on it.

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## How to

Add and Edit Exchange Server Group

To add a exchange server group navigate to the following path:



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

**Note:** You can also edit existing server group by clicking on the **Edit** link.

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

- **Server Group Name:** This is the friendly name of the server group. For example, *Corporate Customers*.
- **Provider:** Select the hosted email provider for this group, for e.g. *Exchange Server 2010 Hosting*.
- **Active Directory Domain:** Select the active directory domain of this Exchange server. See [How to Add Active Directory Domain](#) section to learn about managing active directory domains.
- **LDAP URL:** This is the location of active directory OU under which Control Panel will create exchange organization. You may change this location any time as this will not affect existing accounts.  
  
Example: LDAP://OU=Control Panel System, OU=Hosting, DC=Fabrikam, DC=COM
- **Fill Style:** Select from one of the two options.
  - Least Filled First: Setup hosting on the group member which is least filled.
  - One-by-One: Setup hosting on group members in circular manner.
- **Enabled:** If unchecked, system will not provision any accounts on the server group members.

Expand the **Optional Setting** section to view the following fields:

**Note:** The domain name used is example.com

- **Platform access domain:** The platform access domain can be acquired from the back-end by typing the following command at power shell.  
  
CMD: *Get-outlookAnywhere | fl Externalhostname*
- **Auto discover URL:** As the domain is example.com so the value for auto discover should be autodiscover.example.com. This value is acquirable from the backend server by using the following command at PS.  
  
CMD: *Get-autodiscovervirtualdirectory | fl ExternalURL*
- **Auto discover redirect URL:** As the domain is example.com so the value for auto discover redirect URL should be autodiscoveredirect.example.com. This value need to be input manually.
- **MX record address:** MX values in example.com public zone. In our example it will be mx1.example.com, mx2.example.com. These values need to be input manually.
- **OWA URL:** The OWA URL can be acquired from the backend server by typing the following command.  
  
CMD: *Get-OwaVirtualDirectory | fl ExternalURL*
- **Outlook Anywhere URL:** The Outlook Anywhere URL can be acquired from the backend server by typing the following command.  
  
CMD: *Get-outlookAnywhere | fl Externalhostname*
- **Incoming mail Address (POP/IMAP)**  
  
These values need to be input manually.
  - As domain is example.com so the value for POP should be pop.example.com which should be pointing to CAS.
  - As domain is example.com so the value for IMAP should be imap.example.com which should be pointing to CAS.
- **Outgoing Mail (SMTP):** As domain is example.com so the value for SMTP should be smtp.example.com which should be pointing to HUB Server. This value need to be input manually.
- **Exchange Proxy Settings:** This value can be acquirable from the backend Exchange Server.
- **Override Domain Credentials:** You can check this option and use credentials other than the one mentioned in the Active Directory Domain.

Click **Next** button to proceed to step-2. Now you will be prompted to [add exchange server group member](#).

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## Add/Edit Exchange Server Group Member

Group Member is exchange server added to server group. To add a exchange server as group member navigate to the following path:



**Navigation:** Home » Service Director » Exchange Hosting » Server Groups

**Note:** You can also edit existing server group by clicking on the **Edit** link.

Click on **Add Group Member** button in front of desired server group.

- **Reference ID:** This can be any internal ID you want to assign.
- **Server alias:** Enter a friendly name of the exchange server being added.
- **IP :** Enter the IP address of the Exchange Server.
- **OAB distribution method:** Select the desired method for OAB distribution.
- **Remote Server FQDN:** Enter the exchange server name or FQDN. For example, exch1.mymedia.net. Click on **Get Mailbox Databases** button to retrieve the list of exchange mailbox databases.
- **CAS Internal FQDN:** Enter the CAS server name or FQDN.
- **Mailbox database:** Select the mailbox database from the drop down list.
- **Public folder server FQDN:** Provide the public folder FQDN, same as remote Server FQDN.
- **Personal archive database:** Select the mailbox database from the drop down list.
- **Maximum number of mailboxes:** Enter maximum number of mailbox that you would like to create on this particular exchange server.
- **Current number of mailboxes:** Enter the current number of mailboxes that this exchange server has. This value is used in contrast with *Maximum number of mailboxes* setting.
- **Handle DNS:** You must have manually created the zone and MX record if this option is left unchecked. But checking this option enables automatic creation of zone and MX record through Control Panel. For this, you need to add web server and configure DNS Service on it. [Click here](#) for details.
  - **Select Primary DNS Server:** Choose name of Primary DNS Server.
  - **Apply DNS template:** Choose DNS Template you want to apply when Exchange Organization is provisioned.
  - **CAS server/CAS array public IP:** Specify public IP of CAS server/CAS array.

Click on **Finish** button.

**Note:** OAB distribution method field is not available for Exchange 2010 Hosting mode and Exchange 2013.

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## Exchange Accounts

### Exchange Accounts

To view Exchange Accounts, navigate to the following path:



**Navigation:** Service Director » Exchange Hosting » Exchange Accounts

Click on **Service Management** link for any account to show options to manipulate and manage corresponding exchange account.

The list displays the following:

- **Subscription ID:** This is unique ID assigned to the subscriptions.
- **Mail Domain:** The name of SMTP domain.
- **Mail Boxes:** Total number of exchange mailboxes created in the organization.

- **Service Management:** Click on this link to [manage exchange service](#).

Clicking on **Service Management** of particular exchange server will allow to manage exchange service. You will be presented with **General Settings** tab initially that shows basic exchange service related information.

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## Service Management

### Hosted Email Service Management

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

To view exchange organizations navigate to the following path:



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

Click on the **Service Management** link 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. Click on **Put on hold** button to put it on hold and click on **Enable Migration** button if you want to allow migration for the exchange server.

Currently available management modules include:

- [Exchange Organizations Management](#)
- [Exchange SMTP domains Management](#)
- [Exchange Mailbox Management](#)
- [Exchange Mail Contacts Management](#)
- [Exchange Distribution lists Management](#)
- [Exchange Public Folders Management](#)
- [Exchange Wireless Service Management](#)
- [Exchange Retention Settings Management](#)

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### Managing Exchange Domains

#### Viewing Exchange Domains

Exchange mail domains are accepted SMTP domains which are allowed to send and receive emails. To view exchange mail domains navigate to the following path:



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

Click on the **Service Management** link and then select **Exchange Mail Domains** tab.

The list of exchange mail domains displays following:

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

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

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How to

To add an SMTP domain navigate to the following path:



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

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

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To delete an SMTP domain navigate to the following path:



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

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

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Managing Mail Boxes

Viewing Mailboxes

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



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

Click on the **Service Management** link and then select **Mail Boxes** 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 also perform group actions on the mailboxes by clicking on the **Group Actions** button. The list of mail boxes displays following:

The icon shows that it is **User mailbox , Room Mailbox, Equipment mailbox or Linked mailbox**.

- **Display name:** The mail box name such as Room Mailbox.
- **User Principal Name:** The domain user name for this mailbox as it displays in OWA and in from address when sending mail.
- **Email:** The email address for the mailbox.
- **Disk Space Allowed:** Total mailbox size in Kilobytes.
- **Status:** Only Active mailboxes can send and receive mails.
- **Options:** It shows the following two options:
  - .1.**Disable:** Click this button to disconnect the mailbox.
  - .2.**Delete:** Click to delete the mailbox from exchange and active directory.

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

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How to

Mailboxes are mail addresses which are used to send and receive emails. To add a new mailbox navigate to the following path:



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

Click on the **Service Management** link and then select **Mail Boxes** tab. Click on the **Add New Mailbox** button. The add mailbox screen displays following:

- **Mail enable active directory user:** Exchange user for which you want to enable the service.
- **Mailbox Database:** You can select Mailbox database from the dropdown list.
- **Mailbox size:** For Instance if you have a plan(2 mailboxes 2048MB) and one add-on(2 mailboxes 4096MB). Now you have total 4 mailboxes, you can create 2 mailboxes with size 2 GB and two with 4GB at the time of creation with fixed sizes.
- **Language:** Select locale of the mailbox.
- **Full Name (Display name):** The mail box name as it displays in OWA and in from address when sending mail.
- **Primary Email:** The email address for the mailbox. For example, sales.
- **Mailbox Type:** Select the mailbox type as **User mailbox**. Available options are
  - 1.2.**User mailbox:** Most common type of mailbox should be selected commonly.
  - 1.3.**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.
  - 1.4.**Room mailbox:** Special type of mailbox for reserving rooms etc. [Click here](#) to add a room mailbox.
  - 1.5.**Equipment mailbox:** Special type of mailbox for equipment. [Click here](#) to add a equipment mailbox.
  2. **Password:** Enter the password you would like to set for this mailbox. The password must contain at least 1 digit, 1 upper-case letter, 1 lower-case letter and 1 special character.
  3. **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.

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



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

Click on the **Service Management** link and then select **Mail Boxes** tab. Click on the **Add new mailbox** button to add a new mailbox.

- **Mail-enable active directory user:** Select the Existing user or create the new one.
- **Mailbox database:** Select Mailbox Database from the drop down list
- **Mailbox Size (in MB):** Provide mailbox size in MB.
- **Full Name (Display name):** Provide the display name of the mailbox.
- **Primary email:** Provide email address for the account.
- **Mailbox type:** Select mailbox type **Room Mailbox \ Equipment Mailbox.**
- **Managed By:** Select the user for the management of the mailbox.
- **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.

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To add a linked mailbox navigate to the following path:



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

Click on the **Service Management** link and then select **Mail Boxes** tab. Click on the **Add new mailbox** button to add a new mailbox.

- **Mail-enable active directory user:** Select the Existing user or create the new one.
- **Mailbox database:** Select Mailbox Database from the drop down list
- **Mailbox Size (in MB):** Provide mailbox size in MB.
- **Full Name (Display name):** Provide the display name of the mailbox.
- **Primary email:** Provide email address for the account.
- **Mailbox type:** Select mailbox type **Linked Mailbox.**
- **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.
- **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.
- **Linked domain administrator login:** Provide Administrator login.
- **Linked domain administrator password:** Provide password.
- **Confirm password:** Retype password.
- **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.

To add a new mailbox navigate to the following path:



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

Click on the **Service Management** link and then select **Mail Boxes** tab. Click on the **Group Actions** button.

The Group Actions screen displays following:

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

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



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

Click on the **Service Management** link and then select **Mail Boxes** tab. Click on the mailbox display name for which you wish to manage mailbox settings and features:

You will see the followings tabs:

- [General Settings](#)
- [Email Addresses](#)
- [Mailbox Database](#)
- [Mail Flow Settings](#)
- [Advanced Storage Quotas](#), [Mail box Features](#).
- [Permissions](#)
- [Wireless Service](#)
- [Set Password](#)
- [Personal Archive Settings](#)

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



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

Click on the **Service Management** link and then select **Mail Boxes** tab. Click on the mailbox name for which you wish to set its general Settings as below:

#### General Settings:

- **User:** Provide or change user principal name.
- **Domain User name:** It shows the domain user name for e.g. pss-lab2010
- **Display name:** It shows the user's display name.
- **Mailbox type:** It shows the mailbox type for e.g. Room Mailbox
- **Managed By:** Select the mailbox type.
- **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

- **Job title:** Provide the job title.
- **Company name:** Provide the company name.
- **Department:** Provide the department name.
- **Office:** Provide the name of the office.

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A mailbox can have multiple email addresses or aliases. This allows the mailbox 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 » Exchange Accounts

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

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To manage Mailbox Database navigate to the following path:



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

Click on the **Service Management** link and then select **Mail Boxes** 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.

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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:



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

Click on the **Service Management** link and then select **Mail Boxes** 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.

- **Recipient limit:** Provide limit or check Unlimited.
- **Max sending message size limit (MB):** Provide limit or check Unlimited.
- **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:

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

- **No senders:** If selected, message will never be rejected.
- **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.

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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:



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

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

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When a mailbox is first created it inherits the OWA and Service Access (POP/SMTP/IMAP) from the service plan assigned to exchange organization. In some cases you may want to change service features for individual mailboxes. You may do this easily via web interface.

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



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

Click on the **Service Management** link and then select **Mail Boxes** tab. Click on the mailbox name for which you wish manage the service features. Now, click on the **Advanced** tabs to set various OWA and POP/IMAP/SMTP options.

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To change permissions on mailboxes navigate to the following path:



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

Click on the **Service Management** link and then select **Mail Boxes** 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:

- Send on Behalf
- Send As
- 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.

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To manage wireless account navigate to the following path:



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

Click on **Service Management** link 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 activations:

You can also view wireless device and device activity.

#### **Device Options**

- Clear Statistics
- Wipe device
- Resend Service Book

#### **Device Activation**

- Specify an Activation Password
- Generate an Activation Email
- Clear Activation Password

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



**Navigation:** Home » Service Director » Exchange Control Panel » Exchange Accounts

Click on the **Service Management** link and then select **Mail Boxes** 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.

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



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

Click on the **Service Management** link and then select **Mail Boxes** 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:

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

Then click on **Save** button.

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Managing Mail Contacts

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:



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

Click on the **Service Management** link and then select **Mail Contacts** tab.

You can **Add Mail Contact** and **Add Bulk Mail Contact**.

The list of mail contacts displays following:

- **Display name:** The mail box name as it displays in Global Address List (GAL).
- **External Email:** The email address for the emails for this mail contact are delivered.
- **Status:** Only Active mailboxes can send and receive mails.
- **Delete:** Click to delete the mail contact from exchange and active directory.

**Note:** you can also [add bulk mail contacts](#) by importing contact in csv file.

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How to

To add a mail contact or bulk mail contact navigate to the following path:



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

Click on the **Service Management** link and then select **Mail Boxes** tab. Click on the **Add New Mail Contact** button.



The add mail contact screen displays following:

- **Display name:** The mail box contact name as it displays in OWA.
- **External Email:** The external email address where mails for this contact shall deliver.
- **Primary SMTP Email:** For each external email address there is an SMTP email created in exchange. Enter the SMTP email address name you would like to create for this mail contact.
- **Hide from Exchange Address List:** Click this checkbox if you wish to hide the email account from Global Access List (GAL).
- **Optional Fields:** Optional fields may be left blank and filled later.

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

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

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

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

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To delete a mail contact navigate to the following path:



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

Click on the **Service Management** link and then select **Mail Contacts** tab. Click on the **Delete** button in front of mail contact you wish to delete.

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To disable a mail contact, navigate to the following path:



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

Click on the **Service Management** link and then select **Mail Contacts** tab. Click on the **Disable** button in front of mail contact you wish to disable.

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Managing Distribution Lists

Viewing Distribution Lists

Distribution lists are group of mailboxes for easy mail distribution. For example, you may create a 'sales' distribution list, add mailboxes to it and then use sales distribution list to send single email which is distributed among all the member mail boxes.

To view distribution lists navigate to the following path:



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

Click on the **Service Management** link and then select **Distribution List** tab.

The list of distribution lists displays following:

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

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How to

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

To add a distribution list navigate to the following path:



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

Click on the **Service Management** link and then select **Distribution List** tab.

- **Type:** Select type of the distribution List.
- **Display Name:** Enter the distribution list name in **Display Name** Box.
- **Primary Email:** Enter primary email address.

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

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

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

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

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

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



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

Click on the **Service Management** link and then select **Distribution List** tab. Select the distribution list for which you wish to add a new member. Click on the **List Members** tab and select the list member from **Mailbox** drop-down list. Click the **Add** button.

If Mailbox drop-down is empty then either all available mailboxes are already list member or there is no mailbox created. To create a new mailbox, see [Add Mailbox](#) section.

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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 » Exchange Accounts

Click on the **Service Management** link 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.

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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 » Exchange Accounts

Click on the **Service Management** link and then select **Distribution List** tab. Click on the distribution list name for which you wish to add email address and select **Advanced** tab.

The advanced interface displays following:

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

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

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

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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 » Exchange Accounts

Click on the **Service Management** link 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.

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Managing Public Folders

Viewing Public folders

To view Public Folders navigate to the following path:



**Navigation:** Home » Service Director » Exchange Hosting » Exchange Accounts » Service Management

To create a new Public Folder Click on **Add Public Folder** Button.

It shows the following listings:

- **Public Folder name:** It shows the public folder name. Click on folder name to manage public folders.
- **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**.

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

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

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How to

Click on the **Service Management** link and then select **Public Folders** tab.

To Add Public Folders navigate to the following path:



**Navigation:** Home » Service Director » Exchange Hosting » Exchange Accounts » Service Management

Click on **Add Public Folder** button. Fill in the following fields:

- **Public folder root:** Select the root for the public folder you want to create.
- **Folder name:** Give the name of the public folder.
- **Mail Enable Folder:** Check or uncheck if you want a Mail Enable.

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

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## Managing Wireless Service

### View Wireless Accounts

This section will display all the active wireless accounts. To view wireless service accounts navigate to the following path:



**Navigation: Home » Service Director » Wireless Services » Wireless Accounts**

The list displays the following:

- **Display Name:** Shows Title or name of the mailbox for which wireless services have been activated.
- **Email Address:** Shows email address of the mailbox for which wireless services have been activated.
- **Provider:** Shows the provider version that has been activated for each mailbox.
- **Device Status:** Shows connectivity status of the device with wireless server.
- **Manage Service:** Click on **Manage Service** link to [manage wireless service](#).

Or navigate to the following path:



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

Click on **Service Management** link and select **Wireless Service** tab. Click on **Activate** link to activate wireless services. To deactivate wireless account click on **Deactivate Wireless** button.

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## Manage Wireless Service

To manage wireless account navigate to the following path:



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

Click on **Service Management** link 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 activations:

You can also view wireless device and device activity.

### Device Options

- Clear Statistics
- Wipe device
- Resend Service Book

### Device Activation

- Specify an Activation Password
- Generate an Activation Email
- Clear Activation Password

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Managing Group Actions

Viewing Group Actions

To view Group Actions navigate to the following path:



**Navigation: Service Director » Exchange Hosting » Exchange Accounts » Service Management**

Click on the **Group Actions** tab to show options to manipulate and manage group actions.

The list displays the following:

- **Mailboxes:** Select Mailboxes on which you want to perform Group Action.
- **Operations:** You can perform following operations:
  - Disable Archive
  - Enable
  - Disable
  - Delete
  - Enable Litigation Hold
  - Disable Litigation Hold
- **General Settings:** It shows the status of the group action i.e. cancelled, completed, failed or pending.
- **Mail Flow Settings:** You can configure general settings such as Language etc.
- **Storage Quotas:** You can define storage quotas for bulk mailboxes.
- **Mailbox Features:** You can change the mailbox features.
- **Mailbox Databases:** You can change mailbox databases.
- **Distribution member Lists:** You can add Distribution member lists. It is option to make multiple mailboxes/users member of multiple distribution lists can be used from Group Actions.
- **Add Email Alias:** You can add email alias.

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Managing Retention Settings

Viewing Retention Settings

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



**Navigation: Service Director » Exchange Hosting » Exchange Accounts » Service Management**

It show the buttons to add **Retention Tags** and **Retention Policies**. The list displays the following:

- **Tag name:** It displays the tag name.
- **Tag type:** It displays the tag type.
- **Action to take when age limit is reached:** It displays the action to be taken.
- **Age:** It displays the time period.
- **Retention enabled:** It shows the tag is enabled or not.
- **Options:** You can remove the tag from option column.

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## Adding Retention Policies

To add retention policies navigate to the following path:



**Navigation: Service Director » Exchange Hosting » Exchange Accounts » Service Management**

Click on the **Retention Policies** button to add.

The list displays the following:

- **Name:** Enter the name of the policy.
- **Retention policy tag:** Check the tag for which you want to define policy.
- **Mailboxes:** Check mailboxes on which you want to apply the policy.

Click on **Save** button when done

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## Adding Retention Tags

To add retention tags navigate to the following path:



**Navigation: Service Director » Exchange Hosting » Exchange Accounts » Service Management**

Click on the **Retention Tags** button to add tag.

The list displays the following:

- **Tag name:** Enter tag name.
- **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.
- **Disable this tag:** If you want to disable the tag then check this option.
- **Age limit for retention (days):** Enter Age limit for the tag.
- **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
- **Comments:** Enter comments.

Click on **Save** button when done.

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## SPLA Report

To view SPLA Report navigate to the following path:



**Navigation: Home » Service Director » Exchange Hosting » SPLA Report**

It displays the listing as follows:

- **Plan:** The following plans are available:
  1. **Basic:** (where MAPI Access=FALSE & Exchange Active Sync=FALSE)
  2. **Standard:** (where MAPI Access=FALSE & Exchange Active Sync=TRUE)
  3. **Standard Plus:** (where MAPI Access=TRUE)
- **Active Mailboxes:** It displays the number of active mailboxes.
- **Pending Setup/Disabled Mailboxes:** It shows the number of pending setup/disabled mailboxes.
- **Total:** It displays the total number mailboxes.

**Note:** You can also view and export to excel the Edu-discount plan.

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## Usage Report

To view Usage Report navigate through the following path:



**Navigation:** Home » Service Director » Exchange Hosting » Usage Report

To filter record fill in the following field:

- **Owner:** It is the name of the owner.
- **Customer Name:** It is the customer name.
- **Organization Name:** It is the organization name.

Then click on **filter** Button.

The **Organization Usage Report** tab shows the following listings:

- **Organization Name:** It displays the name of the organization.
- **Customer Name:** It displays the name of the customer.
- **Owner:** It displays the name of the owner.
- **Accepted Domains:** It shows the no. of accepted domains.
- **Mailboxes:** It displays the no. of the mailboxes are available.
- **Distribution Lists:** It shows the no. of distribution lists.
- **Contact Lists:** It displays the no. of contact lists
- **Public Folders:** It displays the no. of public folders.
- **Wireless Accounts:** It shows the no. of wireless accounts.
- **MailBox Usage (MB):** It displays the mailbox usage in MB.
- **Public Folder Usage (MB):** It displays the public folder usage in MB.

To view **MailBox Usage Report** navigate through the following path:



**Navigation:** Home » Service Director » Exchange Hosting » Usage Report

Then click on the **MailBox Usage Report** tab.

- **Organization Name:** It displays the name of the organization.
- **Customer Name:** It displays the name of the customer.
- **Owner:** It displays the name of the owner.
- **MailBox:** It displays the number of available mailboxes .
- **Size (MB) :** It displays the size of the mailbox in MB.
- **Issue warning at (MB):** It displays the size in MB when to issue the warning.
- **Prohibit send at (MB):** It displays the size in MB for prohibit send.
- **Prohibit send and receive at (MB):** It displays the size in MB for prohibit send and receive.
- **Last Updated:** It displays the date when it was updated last time.

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## Group Actions

To view Group Actions, navigate to the following path:



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

To search for the Group actions

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

It displays the following listings:

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

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## Exchange Databases

### Exchange Databases

To view Exchange Databases, navigate to the following path:



**Navigation: Home » Service Director » Exchange Hosting » Exchange Databases**

To search for the Databases select **Exchange server** from the dropdown list and click on **Go** button. To add new mailbox database, click on **Add Database** button.

You can view the following fields for the Databases:

- **Database Name:** This shows the name of the Mailbox Database.
- **Current Number of Mailboxes:** This shows the current number of the Mailboxes.
- **No of Archive Mailboxes:** This shows the no of archive Mailboxes.
- **Options:** From the option column you can perform the following operations on the database:
  - **Mount\Dis Mount:** This option will allow you to mount\dis-mount a particular mailbox database.
  - **Edit:** you can edit the settings of a mailbox database.
  - **Remove:** You can remove a mailbox database from the exchange server.

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### Add Exchange database

To add new mailbox database, navigate to the following path and click on **Add Database** button.



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

To add mailbox database, provide the following fields under the databases tab:

- **Database Name:** Provide an appropriate database name.
- **Select server:** Select the appropriate server from the dropdown list.
- **Mount:** Check this option to mount the mailbox database.
- **Customer:** Select the name of the customer from the dropdown list.
- **Databases File path:** Provide the Database file path.
- **Log folder path:** Provide the log folder path.

Click on **Save** when done.

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## SharePoint Hosting

### Server Groups

#### Overview

With Control Panel you may organize your SharePoint servers in groups. The groups are particularly effective for segregating SharePoint servers based on their role or capacity. For example, you may want to reserve couple of servers for resellers only. You can do this by creating a server group and then adding those servers to that group.

#### Example:

- Create a server group called **Reseller Customers**.
- Choose appropriate provider i.e. **Windows SharePoint 3.0/SharePoint 2010/SharePoint Multi-tenant /SharePoint 2013**.
- Add server(s) to this Server Group. These are actual servers where SharePoint Services is installed and will be provisioned.
- Create a hosting plan "SharePoint Gold Hosting" and assign **Reseller Customers** group to this package.

Now, when you sell SharePoint Gold Hosting, Control Panel will automatically provision the hosted SharePoint service on of the member server(s) based on type of load balancing you have selected for server group.

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### SharePoint Server Groups Management

To view/manage SharePoint server groups navigate to the following path:



Navigation: [Home](#) » [Service Director](#) » [SharePoint Hosting](#) » [Server Groups](#)

The list of server groups displays following:

- **Enabled:** Tick means Yes.
- **Server Group Name:** Friendly name.
- **Provider:** Indicates the SharePoint server provider for this server group.
- **Add Group Member:** Click on this link to add a new member to the existing server group.
- **Test Service:** Click on Test Service link to check if the server is integrated successfully.
- **Disable:** To disable a server group click on disable link.
- **Edit:** Click on this link to edit server group properties.
- **Remove:** Click to remove server group. You cannot remove a server group if there are active servers with active subscriptions.

## SharePoint Server Group Members Management

To view/manage SharePoint server group members navigate to the following path:



**Navigation:** Home » Service Director » SharePoint Hosting » Server Groups

Click on the **Server Group Name** link, a new tab **SharePoint Hosting Servers** will open.

The list of server group members displays following:

- **Enabled:** Tick means Yes.
- **Server Name:** Friendly name of the server.
- **Test Service:** Click on Test Service link for the newly added service group to verify the connection between MachPanel control server and remote server.
- **Disable:** Click on this link to disable hosted email provisioning on the server. You may want to do this if server is down or it is full.
- **Edit:** Click on this link to edit server properties.
- **Remove:** Click to remove server from group. You cannot remove a server if there are active subscriptions on it.

## How to

Add and Edit SharePoint Server Group

To add a SharePoint server group navigate to the following path:



**Navigation:** Home » Service Director » SharePoint Hosting » Server Groups

**Note:** You can also edit existing server group by clicking on the **Edit** link.

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

- **Server Group Name:** This is the friendly name of the server group. For example, SPGroup01.
- **Provider:** Select the hosted SharePoint provider for this group, i.e. Microsoft SharePoint 3.0/SharePoint 2010.
- **Active Directory Domain:** Select the Active Directory domain. See How to [Add Active Directory Domain](#) section to learn about managing active directory domains.
- **LDAP URL:** This is the location of active directory OU under which Control Panel will create hosted SharePoint organizations. You may change this location any time as this will not affect existing accounts.  
Example: LDAP://OU=Control Panel System,OU=Hosting, DC=Fabricam,DC=COM
- **Fill Style:** Select from one of the two options.
  - Least Filled First: Setup hosting on the group member which is least filled.
  - One-by-One: Setup hosting on group members in circular manner.
- **Enabled:** Check to enable the server.
- **Override Domain Credentials:** You can check this option and use credentials other than the one mentioned in the Active Directory Domain.

Click **Next** button to proceed to step-2. Now you will be prompted to add to SharePoint server group member.

## Add and Edit SharePoint Server Group Member

To add a SharePoint server group navigate to the following path:



**Navigation:** Home » Service Director » SharePoint Hosting » Server Groups

**Note:** You can also edit existing server group member by clicking on the **Edit** link.

Click on **Add Group Member** button in front of desired server group.

- **Reference ID:** This can be any internal ID you want to assign.
- **IP:** Enter the IP address of your SharePoint server.
- **SharePoint Web Application URL:** Enter the web application name that you created during SharePoint installation step. For example, fabrikam.com. This web application is used to extend site collections.
- **Web Application IP:** Enter the IP address of your SharePoint server.
- **Public IP of the SharePoint Server:** Provide SharePoint public IP.
- **Host File Entries:** Check this option to add host file entries.
- **Handle DNS:** Click here to handle DNS and select primary DNS sever from the dropdown list.
- **File Restrictions:** Enter the file types from being saves or retrieved from nay site on the server. If a user tries to save or retrieve a blocked file type, he or she will see an error and will not be able to save or retrieve the file.
- **Send e-mail notifications to owners of unused site collections:** Tick this checkbox if you would like to enable this option on your SharePoint server.
- **Start sending unused site collections notifications:** Default value is 25.
- **Check for unused site collections and send notices:** Select the interval and time.
- **Automatically delete the site collection if use is not confirmed:** Tick this checkbox if you would like to enable this option on your SharePoint server.
- **Delete the site collection after sending:** Default value is 28 notices.
- **Outbound SMTP server:** Enter the SMTP server IP/name to use for sending e-mails.
- **From/Reply-to Address:** Enter the From and Reply-to addresses for the SharePoint generated e-mails.

In case of **SharePoint Multi-tenant 2010** you have to provide the following fields:

- **Foundation Feature Pack ID:** Enter Feature Pack ID.
- **Standard Feature Pack ID:** Enter Feature Pack ID.
- **Enterprise Feature Pack ID:** Enter Feature Pack ID.
- **User Profile Service Proxy:** Provide UPA proxy name.
- **Managed metadata Service Proxy:** Enter MMS proxy name.

Click on **Finish** button.

## SharePoint Accounts

### SharePoint Account

To view SharePoint accounts navigate to the following path:



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

Click on the **Service Management** link for any account to show options to manipulate and manage corresponding SharePoint account.

The list displays the following:

- **Subscription ID:** This is unique ID assigned to the subscriptions.
- **Portal Title:** Specific title that is assigned to the site.
- **URL:** Web address of newly created site.
- **Users:** Number of subscribed users against the site.
- **Customer ID:** It displays the customer id.
- **Customer Name:** It displays the customer name.
- **Company Name:** It displays the name of the company.
- **Options:** Click on **Service Management** link to [manage SharePoint service](#).

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## Service Management

Hosted SharePoint Service Management

SharePoint Extension 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.



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

Click on the Service Management link from options.

You will see the following tabs.

- **General Settings:** Click on Put on Hold button to put it on-hold. You can view the general and the service summary.
- **SharePoint Portal:** Click on **Connect to SharePoint Portal** link to [view SharePoint Portal](#). Click on **Edit** button to edit SharePoint Portal.
- **Domains:** You can [add new SharePoint domains](#).
- **Users:** You can view all the users. Click on **Add User** button to create a new user. Click here to [Add an new User](#).

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SharePoint Portals

View ing SharePoint Portal

To view SharePoint Portals navigate to the following path:



Navigation: Home » Service Director » SharePoint Hosting

Click on the **Service Management** link and select **SharePoint Portal** tab. [Click here](#) to see how to add new portal\organization.

- **Domain Name:**It shows the SharePoint domain name for e.g. domaine.com.
- **Title:** It shows the title of the SharePoint portal.
- **Description:** It shows the description if any.

- **URL:** It shows the URL of the SharePoint portal for e.g. `http://pss.sp-pss-10`.
- **Manager:** It shows the manager of the portal.
- **Manager Email:** It shows the email address.
- **Maximum Storage level for each site collection (MB):** Unlimited
- **Send warning e-mail when storage for each portal reaches (MB):** Unlimited
- **Language:** It shows the Locale for e.g. English.
- **SharePoint:** Click on the **Connect to SharePoint Portal** link to connect.

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

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Add new Organizations Portals

To create a new Organization / Portal for your SharePoint account navigate to the following path:



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

Click on the SharePoint Subscription. Select **Organizations/Portals** tab.

The list of SharePoint portals displays following:

- **Organization Name:** The active directory name of the organization. With the name an active directory organizational unit (OU) is created for the organization.
- **Portal:** This is the URL of the SharePoint portal. `http://portal.machsol.com`
- **Title:** This is the SharePoint portal title.
- **Users:** Total users in the SharePoint portal.
- **Service Management:** Click on this link to manage SharePoint service.
- **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:

- **Select existing or new organization:** Select an existing organization from the drop down list or create the new one.
- **Domain Name:** This must be a valid registered and active domain.
- **Manager:** Create account for the manager.
- **Portal address:** Provide portal address. For e.g. `portaladdress.sp-pss-10`.
- **Title:** Provide title.
- **Description:** Provide description about the portal.
- **Admin email:** Provide email address for the admin.
- **Locale:** Select locale from the drop down list.

Then click on **Save** button.

**Note:** Click here to view the [SharePoint Service Management](#).

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## Domains

### Adding SharePoint Domains

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



**Navigation:** Home » Service Director » SharePoint Hosting » SharePoint Accounts

Click on the Service Management link from options. Click on the **Service Management** link from options. Select **Domains** tab:

1. **Domain:** This displays the domain name.
2. **Default:** It shows the domain default settings.
3. **Options:** You can delete a domain or change its default settings from options.

To add a new domain provide the domain name and click on **Save** button.

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## Users

### Add\_Sharepoint\_User

To view SharePoint Users navigate to the following path:



**Navigation:** Home » Service Director » SharePoint Hosting » SharePoint Accounts

Click on the **Service Management** link and then select **Users** tab. Click on the **Add User** button.

The add user screen displays following:

- **User:** You may create a new user or select an existing active directory user.
- **Display Name:** Provide Display name of the User.
- **User Role:** Select the user role you wish to assign to the new user.
- **Email:** This is the e-mail address where SharePoint account e-mail is sent.
- **Password:** Provide password
- **Notes:** Write notes if any.
- **Send email to:** Provide email address.

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

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## SPLA Report

To view the SPLA Report for SharePoint navigate to the following path:



**Navigation:** Home » Service Director » SharePoint Hosting » SPLA Report

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

The SPLA report tab displays the following:

- **Site Collections:** It shows the total number of sites.
- **Users:** It shows the total number of users.

The Multi-tenant SPLA report tab displays the following:

- **Feature Pack:** This shows the foundation, standard, enterprise and total.
- **Site Collections:** It shows the total number of sites according to feature pack.

- **Users:** It shows the total number of users according to feature pack.

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## Usage Report

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



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

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

- **Organization Name:** It displays the name of the SharePoint organization. To manage service click on the organization name.
- **Customer Name:** It displays the customer name.
- **Owner:** It displays the owner name.
- **Title:** It shows the title of the SharePoint account.
- **Portal address:** It shows the portal address.
- **Allocated Storage:** It shows the allocated storage in MB.
- **Current Storage Used:** It shows the storage used currently in MB.
- **Active Domains:** It shows the no of active domains.
- **Users:** It shows the no of users.

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## Wireless Hosting

### Server Groups

#### Wireless Server Group Member Management

To view/manage wireless server group members navigate to the following path:



**Navigation:** Home » Service Director » Wireless Service » Server Groups

Click on the **Server Group Name** link.

The list of server group members displays following:

- **Enabled:** Tick means Yes.
- **Server Name:** Friendly name of the server.
- **Options:**
  - **Test Service:** Test service before provisioning.
  - **Disable:** Click on this link to disable hosted email provisioning on the server. You may want to do this if server is down or it is full.
  - **Edit:** Click on this link to edit server properties.
  - **Remove:** Click to remove server from group. You cannot remove a server if there are active subscriptions on it.

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## Add Server to Wireless Service

To add server to wireless service navigate to the following path:



Navigation: Home » Service Director » Wireless Services » Server Groups

Click on **Server Group Name** under which you want to add new server member and then click **Add Server to Group**.

Fill the form presented on screen and click **Save** button at the end of page when done.

- **Enabled:** Checked means server is enabled.
- **Friendly Name:** Enter friendly name of server.
- **BESAdmin Server FQDN:** Enter FQDN of BlackBerry enterprise server.
- **BESInstance name:** Enter BlackBerry server instance name.
- **Server IP:** Enter IP address of BlackBerry server.
- **User Name:** Enter Username of BlackBerry Server Administrator account.
- **Password:** Password of BlackBerry Server Administrator account.
- **Confirm Password:** Re-enter password of blackberry server administrator account.
- **BES Admin Client Path:** Enter full path to BESUserAdminClient.exe.
- **IT Policies:** BlackBerry IT Policy. Its value is usually "Default".
- **Default Handheld PIN:** This is default PIN for BlackBerry handling.
- **Prepended Disclaimer:** Prepended disclaimer values for BlackBerry.
- **Appended Disclaimer:** Appended disclaimer value for BlackBerry.
- **Auto-generated Password Length:** Specify length for auto-generated password for wireless account.
- **Auto-generated Password Type:** It may be AlphaNumeric Numeric only Lowercase only Uppercase only
- **Password Expiry Time(hrs):** Time in hours for password expiry for blackberry.
- **Max Accounts:** Maximum number of wireless accounts to be provisioned by control panel on the wireless server.
- **Current Accounts Load:** Current number of accounts provisioned on the wireless server.

Click on **Save** when done.

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## Add and Edit BlackBerry Enterprise Server

You must add at least 1 BlackBerry Enterprise Server to Control Panel System. This server will be used for the provisioning of hosted blackberry service. To do this, navigate to the following path:



Navigation: Home » Service Director » Wireless Services » Server Groups

**Note:** You can also edit existing server group by clicking on the **Edit** link.

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

- **Server Group Name:** This is the friendly name of the server group. For example, BSG-1.
- **Provider:** Select "BlackBerry 4.1 or 5.0" from the list.
- **Exchange Server Group:** Select the Exchange Server Group to which this BlackBerry serves.
- **Fill Style:** Select from one of the two options.
  - Least Filled First: Setup hosting on the group member which is least filled.
  - One-by-One: Setup hosting on group members in circular manner.
- **Automatic Provisioning:** If checked the system will automatically provision accounts on group members. If cleared, system will not provision account automatically.

- **Enabled:** If unchecked, system will not provision any accounts on the server group members.
- **Override Domain Credentials:** You can check this option and use credentials other than the one mentioned in the Active Directory Domain.

Click **Next** button to proceed to step-2. Now you will be prompted to add BlackBerry Server group member.

- **Friendly Name:** This can be any internal ID you want to assign. Not used anywhere, it's just for your own reference.
- **Server Name:** This is the friendly name of the server. For example, BSG-1.
- **BESAdmin Server Name:** Enter the NETBIOS name of BlackBerry Enterprise Server. Do not enter IP Address in this field.
- **BES Admin Client Path:** Enter full path to BESUserAdminClient.exe. For example, C:\Program Files\BESUserAdminClient\BESUserAdminClient.exe.

**Note:** The above mentioned path can vary depending upon the location you choose. Please ensure that the file BESUserAdminClient.exe exists on BES at the above mentioned (or chosen) path.

- **Server IP:** Enter the BES IP here.
- **User Name:** Enter BESAdmin here or the user which was used to install BES.
- **Password:** Provide BESAdmin password here.
- **Confirm password:** Provide your password here for confirmation purpose.

**Note:** Provisioning Service will run with BES user rights and credentials.

- **IT Policies:** Enter the IT policy which should be applied on the newly provisioned device. Enter "Default" if you haven't created custom IT policies.
- **Default Handheld PIN:** This is the default PIN set for newly provisioned devices. It makes easy for the service provider to publish in the FAQs.
- **Prepended/Appended Disclaimer:** Enter any disclaimers you wish to add.
- **Auto-generated Password Length:** Enter the maximum length for auto-generated password.
- **Auto-generated Password Type:** Select AlphaNumeric from the list.
- **Password Expiry Time:** Default setting is 48 hours.
- **Maximum Accounts:** Enter maximum number of BlackBerry activations that you would like to create on this particular BlackBerry server.
- **Current Accounts Load:** Currently enabled number of mailboxes.

Click on **Finish** button.

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## Wireless Accounts

### View Wireless Accounts

This section will display all the active wireless accounts. To view wireless service accounts navigate to the following path:



Navigation: Home » Service Director » Wireless Services » Wireless Accounts

The list displays the following:

- **Display Name:** Shows Title or name of the mailbox for which wireless services have been activated.
- **Email Address:** Shows email address of the mailbox for which wireless services have been activated.
- **Provider:** Shows the provider version that has been activated for each mailbox.
- **Device Status:** Shows connectivity status of the device with wireless server.
- **Manage Service:** Click on **Manage Service** link to [manage wireless service](#).

Or navigate to the following path:



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

Click on **Service Management** link and select **Wireless Service** tab. Click on **Activate** link to activate wireless services. To deactivate wireless account click on **Deactivate Wireless** button.

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## Provision BlackBerry Account

In order to provision BlackBerry account navigate to the following path:



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

In order to activate wireless service on a mailbox follow these steps:

- Click **Service Management >> Wireless Services** tab
- Click **Activate**.

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## Service Management

Manage Wireless Service

To manage wireless account navigate to the following path:



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

Click on **Service Management** link 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 activations:

You can also view wireless device and device activity.

### Device Options

- Clear Statistics
- Wipe device
- Resend Service Book

### Device Activation

- Specify an Activation Password
- Generate an Activation Email
- Clear Activation Password

## CRM Hosting

### Overview

#### Hosted CRM Extension(HCE):

Control Panel Supports MS Dynamics CRM 4.0\2011 multi-tenancy that allows the creation of multiple organizations on a single CRM server. Hosted CRM for Control Panel 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.).

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## Server Groups

### Overview

With Panel you may organize your CRM servers in groups. By Using Control Panel you may organize your CRM Servers in groups and may create different service plans for Customers / Resellers and at the same time handling of Internet-Facing Deployment (IFD) URL for every CRM organization."

#### Example:

- Create a server group called **Reseller Customers**.
- Assign **CRM 4.0/CRM 2011** as the provider.
- Create a hosting plan "**CRM Gold Hosting**" and assign Reseller Customers group to this package.
- Now, when you sell CRM Gold Hosting, Panel will automatically provision the hosted CRM service.
- Remove Server from group. You cannot remove a server if there are active subscriptions on it.

Now when you sell CRM Gold Hosting, Panel will automatically provision the hosted CRM service on one of the two member servers.

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## Viewing CRM Server Groups

To view/manage CRM server groups navigate to the following path:



**Navigation: Home » Service Director » CRM Hosting » Server Groups**

To add a new server click on **Add Server Group** button.

The list of server groups displays following:

- **Enabled:** Tick means enabled.
- **Server Group Name:** Friendly name.
- **Provider:** Indicates the CRM server provider for this server group.
- **Options:** Following are the options:
  - **Add Group member:** Click to add new member.
  - **Edit:** Click on this link to edit server group properties.

- **Remove:** Click to remove server group. You cannot remove a server group if there are active servers with active subscriptions.

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## Viewing CRM Server Group Members

To view/manage CRM server group members navigate to the following path:



**Navigation:** Home » Service Director » CRM Hosting » Server Groups

Click on the **Server Group Name** link a new tab **CRM Servers** will open.

The list of server group members displays following:

- **Enabled:** Tick means Yes.
- **Server Name:** Friendly name of the server.
- **SQL Report Server URL:** Type the SQL Report Server URL e.g. **http://<ReportServerIP>/ReportServer**
- **Test Service:** Click on test Service link to test the servers are connected and integrated successfully.
- **Disable:** Click on this link to disable hosted provisioning on the server. You may want to do this if server is down or it is full.
- **Edit:** Click on this link to edit server properties.
- **Remove:** Click to remove server from group. You cannot remove a server if there are active subscriptions on it.

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## How to

Add and Edit CRM Server Group

To add a CRM server group navigate to the following path:



**Navigation:** Home » Service Director » CRM Hosting » Server Groups

**Note:** You can also edit existing server group by clicking on the **Edit** link.

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

- **Server Group Name:** This is the friendly name of the server group. For example, CRM ServerGroup01.
- **Provider:** Select the hosted CRM provider for this group, i.e. CRM 4.0/CRM 2011.
- **Active Directory Domain:** Select the Active Directory domain. See How to [Add Active Directory Domain](#) section to learn about managing active directory domains.
- **Default Reseller LDAP URL:** This is the location of active directory OU under which Control Panel will create hosted CRM organizations. You may change this location any time as this will not affect

existing accounts.

Example: LDAP://OU=Control Panel System, OU=Hosting, DC=Fabricam, DC=COM

- **Fill Style:** Select from one of the two options.
  - **Least Filled First:** Setup hosting on the group member which is least filled.
  - **One-by-One:** Setup hosting on group members in circular manner.
- **Enabled:** Check to enable the server.
- **Override Domain Credentials:** You can check this option and use credentials other than the one mentioned in the Active Directory Domain.

Click on **Next** button to proceed to step-2. Now you will be prompted to add CRM server group member.

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Add and Edit CRM Server Group Member

To add a CRM server group navigate to the following path:



**Navigation:** Home » Service Director » CRM Hosting » Server Groups

**Note:** You can also edit existing server group member by clicking on the **Edit** link.

Click on **Add Group Member** button in front of desired server group.

- **Reference ID:** This can be any internal ID you want to assign.
- **Server IP:** Enter the IP address of your CRM server.
- **Front End Server IP (Muti-tier):** Enter the IP address of your CRM server for CRM 2011.
- **CRM IFD site URL:** Enter the CRM IFD site URL.
- **URL Base:** Specify the CRM service URL base e.g. MS CRM Services.
- **CRM Server Port:** Set here the port number for your CRM server, e.g. 5555. Default port is 80.
- **Discovery Service URL:** http:// or https:// Enter the discovery Service URL.
- **Discovery Service Port:** Enter port number of the discovery service.
- **SQL Server Name:** Name of SQL server that is used for the Microsoft CRM database.
- **SQL Report Server:** Type the SQL Report Server URL e.g. http://<ReportServerIP>/ReportServer
- **Enabled:** Check to enable the CRM service.
- **Add Host Entry:** Check to add host entry.
- **Handle DNS:** Check to handle DNS for CRM.

Click **Save** button.

**Note:** In case when **CRM 4.0** is selected as provider the **discovery service URL** and **port** option will not be available.

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## CRM Accounts

### CRM Accounts

Navigating to the following path will display CRM accounts:



**Navigation:** Home » Service Director » CRM Hosting » CRM Accounts

Click on the **Service Management** link for any account to show options to manipulate and manage corresponding CRM account.

The list displays the following:

- **Subscription ID:** This is unique ID assigned to the subscriptions.
- **Display Name:** Title or name that is displayed.
- **URL:** Address of newly created organization.
- **Users:** Number of subscribed users against the organization.
- **Service Management:** Click on **Service Management** link to [manage CRM service](#).

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## Service Management

### Overview

Hosted CRM activates rich web based interface for the management of hosted CRM service. Using the web interface the provider and the end-user may perform routine management task without the need of going at the CRM server or active directory.

Navigate to the following path:



**Navigation: Home » Service Director » CRM Hosting » CRM Accounts**

Click on **Service Management** link from options. You will see the following four tabs:

- **General Settings:** Click on **Put on hold** button to put it on hold. You can view general and service info for CRM account. You can synchronize business units by clicking on the link.
- **CRM Organizations:** Click on **Connect to CRM organizations** link to [view CRM Organizations](#).
- **Domains:** You can view and [add new domains](#) to CRM account.
- **Users:** You can [add new users](#) to CRM account.
- **Business Units:** you can also [add Business Units](#).

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### CRM Organization

#### Viewing CRM Organization

To view CRM Organization navigate to the following path:



**Navigation: Home » Service Director » CRM Hosting » CRM Accounts**

Click on the **CRM Organization** tab. [Click here](#) to see how to add new organization.

Interface shows the following:

- **Title:** This is the name or title of organization.
- **URL:** Corresponding URL of the CRM organization.
- **Manager:** User in charge for CRM organization.
- **Manager Email:** Specifies email address of manager.
- **Status:** Shows if the particular organization is enabled or disabled.
- **CRM:** This link will direct and connect to the corresponding organization.

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## Add CRM Organization

To add CRM Organization navigate to the following path:



**Navigation:** Home » Service Director » CRM Hosting » CRM Accounts

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:

- **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.
- **Domain Name:** The primary SMTP mail domain name created for the organization.
- **Manager:** Create account for the manager.
- **Admin email:** Provide admin email address.
- **Password:** (Must be alpha-numeric. Example: 1PassW0rD)
- **Confirm Password:** Retype address.
- **Organization Display Name:** The active directory name of the organization. With the name an active directory organizational unit is created for the organization.
- **Organization Unique Name:** This is the unique name of the organization.
- **Language:** Select Language.
- **First Name:** Provide first name.
- **Last Name:** Provide last name.

Fill in the necessary information regarding **User** and **CRM** and click **Save** button to continue.

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## CRM Domains

### Add CRM Domain

To view CRM Domains navigate to the following path:



**Navigation:** Home » Service Director » CRM Hosting » CRM Accounts

Click on the **Service Management** link. Select Domains tab.



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

To add a new domain to the CRM account.

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

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CRM Users

Add CRM User

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



**Navigation: Home » Service Director » CRM Hosting » CRM Accounts**

Click on the **Service Management** link and then select **Users** tab. Click on the **Add User** button.

**Note:** Existing user can be modified or disabled by clicking on **Edit** and **Disable** respectively.

The add user screen displays following:

- **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.
- **User Role**: Select the user role you wish to assign to the new user.
- **Email**: This is the email address where CRM account email is sent.

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

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Buisness Units

Buisness Units

To view and add buisness units navigate to the following path:



**Navigation: Home » Service Director » CRM Hosting » CRM Accounts**

Click on the **Service Management** link and then select **Buisness Units** tab. It displays the following listing:

- **Business Unit**: Enter Business Unit name.
- **Parent Business Unit**: Select parent buisness unit name.

To add a new buisness unit click on **Add Business Unit** button.

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## SPLA Reports

To view SPLA Report you have to navigate to the following path:



**Navigation: Home » Service Director » CRM Hosting » SPLA Report**

You can see the following details SPLA report in CRM.

To export to excel click **Export to Excel** button.

- **Organizations**
  - **Active:** Shows number of organizations in active state.
  - **Suspended/Disabled:** It shows the number of organizations suspended/disabled.
  - **Total :** It shows the total number of organizations.
- **Users**
  - **Enabled Users:** It shows the enabled users in CRM
  - **Disabled Users:** It shows disabled number of users.
  - **Total:** It shows total number of users.
- **Access Mode**
  - **Read Write :** It shows the number read write access mode.
  - **Administrative:** It shows the number of administrative access mode.
  - **Read Permission:** It shows the number of read permission access mode.
  - **Total:** It shows the total number of access mode.
- **CAL Type**
  - **Full Access:** It shows the number of full access CAL.
  - **Administrative:** It shows the number of administrative CAL.
  - **Limited:** It shows the number of limited CAL.
  - **Device Full:** It shows the number of device full CAL.
  - **Device Limited:** It show the number of device limited CAL.
  - **Total:** It shows the total number of CAL.

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## CRM Usage Report

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



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

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

- **Organization Name:** It display the name of the CRM organization. To manage service click on the organization name.
- **Customer Name:** It displays the customer name.
- **Owner:** It displays the owner name.
- **Display name:** It shows the display name of the customer.
- **Organization Url:** It shows the organization URL.
- **Users:** It shows the no of users.
- **Domains:** It displays the no of domains.

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## Lync Hosting

### Server Groups

#### Viewing Lync Server Groups

To view/manage Lync server groups navigate to the following path:



Navigation: Home » Service Director » Lync Hosting » Server Groups

To add a new server click on **Add Server Group** button. The list of server groups displays following:

- **Enabled:** Tick means Yes.
- **Server Group Name:** Friendly name.
- **Provider:** Indicates the Lync server provider for this server group.
- **Options:** Following are the options:
  - **Add Group Member:** Click to add a new group member.
  - **Disable:** You can disable you Lync Servers by clicking on the Disable link.
  - **Edit:** Click on this link to edit server group properties.
  - **Remove:** Click to remove server group. You cannot remove a server group if there are active servers with active subscriptions.

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#### Lync Server Groups Management

To view/manage Lync server groups navigate to the following path:



Navigation: Home » Service Director » Lync Hosting » Server Groups

To add a new server click on **Add Server Group** button.

In **Step-1** complete the form by:

- **Server Group Name:** Entering friendly name for Server Group.
- **Provider:** Select Provider.
- **Active Directory Domain:** Selecting appropriate Active Directory Domain.
- **LDAP URL:** Specifying LDAP URL where hosted organizations and users will be created.
- **Meet URL options:** Select any one of the three options. For more details <http://technet.microsoft.com/en-us/library/gg425874.aspx>
- **Fill Style:** Select from one of the two options.
  - **Least Filled First:** Setup hosting on the group member who is least filled.
  - **One-by-One:** Setup hosting on group members in circular manner.
- **Enabled:** If unchecked, system will not provision any accounts on the server group members.
- **Override Domain Credentials:** You can check this option and use credentials other than the one mentioned in the Active Directory Domain.

Then click on the **Next** button.

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## Lync Server Groups Member Management

To view/manage Lync server groups navigate to the following path:



**Navigation:** Home » Service Director » Lync Hosting » Server Groups

To add a new server click on **Add Server Group** button. Or Click on **Add Group Member** link.

In **Step-2** complete Server Information section:

- Entering **Front End pool FQDN**. (you can get the pool name by running **Get-CSPool** on Lync management shell)

- Entering **IP of Lync Front End server**.
- Entering the **FQDN of Persistent Chat Server**.

In **User Limit** Section for all three cases specify number of **Current number of users** and **Maximum number of users** to be created on this server.

Click on **Finish** button to add the server.

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## Lync Accounts

### Viewing Lync Accounts

To view Lync accounts navigate to the following path:



**Navigation:** Home » Service Director » Lync Hosting » Lync Accounts

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

It displays the following listing:

- **Subsc.ID** : It shows the subscription id.
- **SIP Domain**: It shows the SIP domain name
- **Users**: It displays the no of users.
- **Customer ID**: It displays the customer id.
- **Customer Name**: It displays the customer name.
- **Company name**: It displays the company name.
- **Options**: Click on **Service Management** link to manage services for Lync account.

## Service Management

### Hosted Lync Service Management

Lync Extension activates rich web based interface for the management of hosted Lync service. Using the web interface the provider and the end-user may perform routine management task. To view Lync accounts navigate to the following path:



**Navigation:** Home » Service Director » Lync Hosting » Lync Accounts

Click on **Service Management** link. Here you can see the following tabs:

- **General Settings:** You can view the general and the service summary.
- **Domains:** You can [add new domains](#) to your lync account.
- **Phone numbers:** you can view [Phone numbers](#) for Lync account.
- **Persistent Chat Service:** You can [add category](#) and [add chat rooms](#) to your Lync account.
- **Users:** You can [add new users](#) & [add bulk users](#) to your lync account.
- **Group Actions:** you can view [Group Actions](#) that are performed.
- **Federation Settings:** You can also define [federation settings](#).

### Domains

#### Adding domain to Lync

To view and add new domain to your Lync accounts navigate to the following path:



**Navigation:** Home » Service Director » Lync Hosting » Lync Accounts

Click on **Service Management** link and select **Domains** tab.

It displays the following listing:

- **Domain:** It shows the domain name.
- **Default:** It shows that the domain is default or not.
- **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.

Phone Numbers

Phone Numbers

To phone numbers added to Lync accounts navigate to the following path:



**Navigation:** Home » Service Director » Lync Hosting » Lync Accounts

Click on **Service Management** link and select **Phone Numbers** tab. It displays the following columns:

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

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Persistent Chat Feature

Persistent Chat Feature

To view/manage Lync persistent chat feature, navigate to the following path:



**Navigation:** Home » Service Director » Lync Hosting » Service Management

You can add & manage Chat categories and Chat rooms under **Persistent Chat** tab.

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Adding Category

To add category to Lync accounts navigate to the following path:



**Navigation:** Home » Service Director » Lync Hosting » Lync Accounts

Click on **Service Management** link. Select **Persistent Chat** tab and then Select the **Chat Categories** tab:

Fill in the following fields to add a category to Lync account.

- **Category Name:** Provide organization name - category name.
- **General Settings:** Check the following options, if you want to enable.
  - .2.Enable Invitations
  - .3.Enable File Upload
  - .4.Enable chat History

**Chat Room creators:**

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

## Chat Room Access

- **Entire Organizations:** Checking this will allow everyone to access chat rooms within this category.
- **Users:** Select Users.

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### Adding Chat Rooms

To add chat room(s) to Lync accounts navigate to the following path:



**Navigation:** Home » Service Director » Lync Hosting » Lync Accounts

Click on **Service Management** link. Select **Persistent Chat** tab and then click on **Chat Room** tab:

Fill in the following fields to create chat rooms.

- **Chat Room name:** Provide the name of the chat room.
- **Select category:** Select category from the dropdown list.
- **Type:** Select Normal or Auditorium.
- **Disabled:** Checking this option will disable the chat room.
- **Members:** Provide the list of members.
- **Managers:** Provide the list of managers.
- **Presenters:** Provide the list of presenters.

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### Users

#### Adding User to Lync

To add user to Lync accounts navigate to the following path:



**Navigation:** Home » Service Director » Lync Hosting » Lync Accounts

Click on **Service Management** link and select **Users** tab. Click on **Add New User** button.

Fill in the following field in *Add User* section

- **Package :** Select package.
- **Lync enabled Active Directory users:** Select user from the drop down list.
- **Full Name (Display name):** Enter your full name.
- **Sign-in-Name:** Enter your sign-in name.
- **Password:** Generate Random (Must be alpha-numeric. Example: 1PassW0rD)
- **Confirm password:** Retype password.
- **Notes:** Enter notes here.

Fill in the following field in *Optional fields* section. These are optional:

- **Initials:** Provide initials if any.
- **First Name:** Provide first name of the user.
- **Middle Name:** Provide middle name of the user.
- **Last Name:** Provide last name of the user.

- **Street Address:** Provide street number.
- **City:** Provide the name of the city.
- **State/Province:** Provide the name of the state/province.
- **Zip/Postal Code:** Provide zip/postal code.
- **Country:** Provide the name of the country.
- **Mobile:** Provide mobile number.
- **Fax:** Provide fax number.
- **Phone (Business):** Provide office phone number.
- **Phone (Home):** Provide home phone number.
- **Pager:** Provide pager address.
- **Web Page:** Provide web page URL.
- **Description:** Provide description of the user.

Fill in the following fields under *Organization* section.

- **Job title:** Provide job title.
- **Company:** Provide company name.
- **Department:** Provide department name
- **Office:** Provide office name.

Fill in the field under *Send setup Email* section.

- **Send Email:** Check if you want to setup send email.
- **Email Address:** Provide email address

Then click on **Save** button.

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

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Adding Bulk User to Lync

To add bulk user to Lync accounts navigate to the following path:



**Navigation:** Home » Service Director » Lync Hosting » Lync Accounts

Click on **Service Management** link and select **Users** tab. Click on **Add Bulk User** button.

- **Package:** Select package from the drop down list for which you want to import bulk user.
- **Select User:** you can select one of the following options:
  - Create new using CSV
  - Lync enabled Active Directory users
- **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.

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Group Actions

Group Actions

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



**Navigation:** Home » Service Director » Lync Hosting » Lync Accounts

Click on **Service Management** link and select **Group Actions** tab.

Select **Package \ Users** to perform group actions.

- **Package :** Select package.
- **Lync enabled Active Directory users:** Select users.
- **Full Name (Display name):** It shows display\ full name.

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Federation Settings

Federation Settings

To view Lync accounts navigate to the following path:



**Navigation:** Home » Service Director » Lync Hosting » Lync Accounts

Click on **Service Management** link. Select **Federation Settings** tab:

You can view the following listing under Federation settings tab:

- **Domain Name:** This shows the domain name.
- **Options:** You can remove the domain by clicking on the remove link.

Fill in the following fields for the federation \ domain.

- **Domain Name:** Provide the domain name.
- **Access Edge Service (FQDN):** Provide the Access edge service (FQDN).
- **Comments:** Provide comments (if any).

Click on **Add New Domain** button when done.

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## Setup

### Add Phone Group

To add phone group to your Lync hosting account navigate to the following path:



**Navigation:** Home » Service Director » Lync Hosting » Setup

It displays the following listing:

- **Group name:** It shows the phone group name.
- **Customer:** It shows the customer of the phone group.
- **Total Numbers :** It shows the total numbers of the groups
- **Options:** From options you can **Edit** and **Remove** the phone group.

To add a phone group click on the **Add Phone Group** button.

- **Group name:** Enter the name of the phone group.
- **Select Customer:** Select the customer from the drop down list.
- **Import Numbers:** Import phone numbers.

Then click on **Save** button.

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### Phone Group Detail

To view phone group detail navigate to the following path:



**Navigation:** Home » Service Director » Lync Hosting » Setup

Click on the existing group name. It displays the following listing:

- **Phone number:** It displays the phone number.
- **Assigned To:** It displays to whom the number is assigned.
- **Options:** You can also **remove** the phone group.

To Edit the phone group click on the **Edit Phone Group** button.

- **Group name:** Enter the name of the phone group.
- **Select Customer:** Select the customer from the drop down list.
- **Import Numbers:** Import phone numbers.

Then click on **Save** button.

To view phone group listings click on the **Phone Group Listing** button.

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## Usage Report

To view Usage report navigate to the usage report.



**Navigation:** Home » Service Director » Lync Hosting » Usage Report

It displays the following listing:

To filter record fill in the following field:

- .2.**Owner:** It is the name of the owner.
- .3.**Customer Name:** It is the customer name.
- .4.**Organization Name:** It is the organization name.

Then click on **filter** Button.

- **Organization Name:** It displays the name of the organization.
- **Customer Name:** It displays the name of the customer.
- **Product Name:** It displays the product name.
- **Owner:** It displays the name of the owner.
- **Active Domains:** It displays the number of active domains.
- **Users:** It displays the number of users.
- **Phone Numbers:** It displays the phone number.

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## VPS Hosting

### Server Groups

#### VPS Server Groups Overview

With Panel you may organize your VPS servers in groups. By Using Control Panel you may organize your VPS Servers in groups and may create different service plans for Resellers/Customers:

Example:

- Create a server group called **VPS Servers**.
- Assign **Hyper-V** as the provider.
- Create a hosting plan "**VPS Hosting**" and assign Reseller/Customers group to this package.
- Now, when you sell VPS Hosting, Panel will automatically provision the hosted VPS service.
- Remove Server from group. You cannot remove a server if there are active subscriptions on it.

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#### Viewing VPS Server Groups

To view/manage VPS server groups navigate to the following path:



**Navigation:** Home » Service Director » VPS Hosting » Server Groups

To add a new server click on **Add Server Group** button. The list of server groups displays following:

- **Enabled:** Tick means Yes.
- **Server Group Name:** Friendly name.
- **Provider:** Select appropriate VPS server provider for this server group.

- **Options:** Following are the options:
  - **Add Group Member:** Click to add a new group member.
  - **Disable:** You can disable your VPS Servers by clicking on Disable link.
  - **Edit:** Click on this link to edit server group properties.
  - **IP Pool:** Click on the IP pool to add IP pools.
  - **Remove:** Click to remove server group. You cannot remove a server group if there are active servers with active subscriptions.

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## Viewing VPS Server Group Members

To view/manage VPS server group members navigate to the following path:



**Navigation:** Home » Service Director » VPS Hosting » Server Groups

To view server group members click on **Server Group** name. To add a new server to the group click on **Add Server to Group** button. The server group members displays the following listings:

- **Enabled:** Tick means Yes.
- **Server Name:** Friendly name.
- **Options:** Following are the options:
  - **Virtual Network:** Click to Virtual Network link in order to view virtual networks.
  - **Test Service:** To test the VPS servers click on Test Service link.
  - **Disable:** You can disable you VPS Servers
  - **Edit:** Click on this link to edit server group properties.
  - **Remove:** Click to remove server group. You cannot remove a server group if there are active servers with active subscriptions.

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## How to

VPS Server Group Management

To add VPS server groups navigate to the following path:



**Navigation:** Home » Service Director » VPS Hosting » Server Groups

To add a new server click on **Add Server Group** button.

In **Step-1** complete the form by:

- **Server Group Name:** Entering friendly name for Server Group.
- **Provider:** Select Provider.
- **Active Directory Domains:** Selecting appropriate Active Directory Domain.
- **Automatic Provisioning:** If checked the system will automatically provision accounts on group

members. If cleared, system will not provision account.

- **Enabled:** If unchecked, system will not provision any accounts on the server group members.

Then click on the **Next** button.

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## VPS Server Group Member Management

To add VPS server group members navigate to the following path:



**Navigation:** Home » Service Director » VPS Hosting » Server Groups

Click on **Add Group Member** link from options in front of an existing server group or add a new server by clicking on **Add Server Group** button.

In **Step-2** complete the form by:

In the **VPS Server** section fill in the following fields:

- **Enabled:** It shows that the Server is enabled.
- **Reference Id:** Entering Reference ID for VPS server.
- **IP:** Entering IP of VPS server.
- **Virtual Hard Disc Location:** Provide the location of the virtual hard disk.
- **Virtual Machine Location:** Provide the location of the virtual machine.

In the **Server Credentials** section fill in the following fields:

- **Username:** Provide Username.
- **Password:** Provide password.
- **Confirm password:** Retype password.

Click on **Finish** button to add the server.

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## VPS Accounts

### VPS Accounts

To view/manage VPS accounts navigate to the following path:



**Navigation:** Home » Service Director » VPS Hosting » VPS Accounts

It displays the following listing:

- **Enabled:** Tick means enabled.
- **Subsc.ID:** It displays the subscription number.
- **Virtual Machine Name:** It displays the name of the virtual machine.
- **Customer ID:** It shows the customer ID.
- **Customer Name:** It displays the name of the customer.
- **Company name:** It displays the name of the company.
- **Options:** Click on **Service Management** link from option to [manage services for VPS](#) accounts.

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## Service Management

### Hosted VPS Service Management

VPS Extension activates rich web based interface for the management of hosted VPS service. Using the web interface the provider and the end-user may perform routine management task. To view VPS accounts navigate to the following path:



**Navigation:** Home » Service Director » VPS Hosting » VPS Accounts

Click on **Service Management** link. Here you can see the following tabs:

- **General Settings:** You can view the general and the service summary.
- **Virtual Machine Management:** Select Virtual Machine management tab for the [machine operations and network management](#).
- **Snapshots:** To [manage snapshot](#) select Snapshots tab.

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### Virtual Machine Management

### Virtual Machine Management

To manage virtual machines and networks navigate to the following path:



**Navigation:** Home » Service Director » VPS Hosting » VPS Accounts

Click on **Service Management** link. Select **Virtual Machine Management** tab:

You can perform the following three *Machine Operations*:

- **Turn Off:** Clicking on this button it will turn off the machine.
- **Hard Reset:** Clicking on the button will reset the all the machine operations.

- **Suspend:** Clicking on this button will suspend the VPS machine.

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.

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

You can also manage virtual networks under *Network Management* section:

- **Address:** It displays the IP address. To remove an IP select address from the list and click on **Remove IP Address** button.
- **DNS Address:** It shows the DNS address. To remove the DNS address select it from the list and click on **Remove DNS Address** button.
- **VLAN ID:** It shows the VLAN ID for e.g.10. You can also change your VLAN ID by clicking on **Change** button.
- **Gateway:** It shows the gateway address.
- **Subnet Mask:** It shows the subnet mask.

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## Virtual Networks

To view/manage Virtual Networks navigate to the following path:



**Navigation: Home » Service Director » VPS Hosting » Server Groups**

Now click on the name of the existing VPS server group name and then select **Virtual Networks** from options in front of the VPS server. To add a new virtual switch click on **Add Virtual Switch** button.

*Virtual Network* tab displays the following listings:

- **Virtual Switch:** It displays the virtual switch.
- **Options:** You can also remove a virtual switch from options.

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## Adding Virtual Switch

To add a Virtual Switch to VPS hosting account navigate to the following path:



**Navigation: Home » Service Director » VPS Hosting » Server Groups**

Now click on the name of the existing VPS server group name and then select **Virtual Networks** from options in front of the VPS server. To add a new virtual switch click on **Add Virtual Switch** button.

It shows the following fields under *Add Virtual Switch* section:

- **Name:** Provide name of the virtual switch.
- **Network Adapter:** Select the network adapter from the dropdown list.
- **Allow management Operating System to share this network adapter:** Check or uncheck it.
- **Enable virtual LAN identification for management operating system:** Check or uncheck it.
- **VLAN ID:** Provide VLAN ID.

Click on **Save** button when done.

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Snapshots

Snapshots

To manage snapshots navigate to the following path:



**Navigation: Home » Service Director » VPS Hosting » VPS Accounts**

Click on **Service Management** link. Select **Snapshots** tab. You can perform the following four operations on snapshots:

- Refresh List
- Take Snapshot
- Delete Snapshot
- Apply Snapshot

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## Setup

### Adding Sealed Images

To view/manage sealed images navigate to the following path:



**Navigation: Home » Service Director » VPS Hosting » Setup**

To add a new image click on **Add Sealed Image** button.

- **Image Name:** Provide image title.
- **Image path:** Provide the path of the image.

Click on **Save** button when done.

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## Dedicated Servers

### Overview Dedicated Servers

Dedicate Server hosting section allows management of dedicated servers sold to customers. Since there is no medium of automatically setting up dedicated servers in a data centre, so you can only manage an existing server and view its details by adding it to the control panel.

- You can store, view and edit General Information of the server.
- You can view and manage summary, services, drivers, IPs, Event Logs, Users, Reboot the server and start/stop Processes under Server Controller area.
- You can view IP Addresses assigned to the server.



- The Advanced section contains information related to Remote Reboot and Root Login for the server.

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## Dedicated Hosting

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



**Navigation:** Home » Service Director » Dedicated Servers

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

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

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## Domain Names

### Domain Names

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

Navigate to following path to access domain names:



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

The list include various attributes including **Subscription ID, Domain Name, Customer ID, Customer Name, Company Name** and **Options**.

**Service Management:** Click on this link to manage domain name.

Clicking on **Service Management** 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.

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.

## IP Addresses

### IP Management Overview

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

### Viewing IP Pools

To view IP Pool navigate to the following path:



**Navigation: Home » Service Director » IP Addresses**

The add IP pool screen shows following:

- **Identification:** Friendly name for this IP pool.
- **Alloc. Type:** Indicates service allocation for this pool.
- **Total:** Shows total number of IPs in the pool.
- **Leased:** Shows IPs leased (assigned) to subscriptions.
- **Excluded:** Shows the excluded or reserved IP range which cannot be assigned to any subscription.
- **Enabled:** Indicates whether IP pool is active or blocked. A blocked pool is not available for IP leasing.

### How to

#### Adding IP Pool

To add IP Pool navigate to the following path:



**Navigation: Home » Service Director » IP Addresses**

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

- **Identification:** Enter a friendly name for this IP pool. Example: Gold\_Reseller\_Block\_C.
- **Hardware node:** Select the hardware node where the IPs are routed. The servers in this list come from Server Groups. See
- Automatic IP collection: Check if you want to enable.
- Enabled: Checked.

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

**Note:** This procedure creates IP address pool and attempts to setup IPs on the hardware node too.

Appropriate success/failure message will show.

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## Lease IP Address

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

To lease IP navigate to the following path:



**Navigation: Home » Service Director » IP Addresses**

### Follow the steps:

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

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

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## Pool Detail/NAT Mapping

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

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



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

Fill in these fields:

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

And then click on **Save** button.

To exclude or include an IP address from automatic allocation, for this click on **New IP Exclusion** and **Add IP in Pool** button respectively.

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

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## Provisioning

### Service Provisioning Overview

Control Panel provisions many services automatically with the respective providers. Depending on the provider capability there may be some services which require manual intervention.

Following is the list of automatic and manual provisioned services.

#### Automatically Provisioned Services

- Shared Hosting
- Reseller Hosting
- Domain Name Registration/Renewal/Transfer
- Hosted Email (Microsoft Exchange)

#### Manually Provisioned Services

- SSL Certificates
- Dedicated Servers
- VPS Servers

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## Exempted Domains Management

Exempted Domains are the Domains that can not be entered in the Domain Name field throughout the system. Follow the below mentioned path to view and manage exempted domains:



**Navigation:** Home » Service Director » Provisioning

You can view the following:

- **Domain Names:** It displays the domain names.
- **Options:** It allows you to **add**, **edit** or **remove** exempted domains as and when required.

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## 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:



**Navigation:** Home » Service Director » Audit Logs

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

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

The Audit Logs displays the following:

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

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## Server Controller

### Adding a Server

Control Panel support remote management of Windows based servers.

To add a server to server controller, navigate to the following path:



**Navigation:** Home » Network Eye » Server Controller

Click **Add New Server** button. The add new server screen shows following:

- **Server name:** Friendly name for the server you are adding.
- **IP Address:** The IP address of this server.
- **Administrator login:** Provide the login of a user with administrative rights.
- **Password:** Provide the password for administrator user.

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

**Note:** All the sensitive information like Password is stored in strong encrypted format.

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### Removing a Server

Control Panel support remote management of Windows based servers.

To remove a server to server controller navigate to the following path:



**Navigation:** Home » Network Eye » Server Controller

Select the server you want to remove from **Select Server** list and then click **Remove Server** button under *Operations* section.

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## Server Management

### Overview

Control Panel provides rich built-in server controller to remotely control your hosting servers. The server controller doesn't require installation of additional software on the server to be controlled.

There are certain pre-requisites before you could successfully work with this module.

- **Windows Servers:** The monitored server should be running Windows operating system
- **Firewall:** If there is firewall between Panel Control Server and target server then make sure that you allow RPC port range 1024 to 5000.
- **Administrator Rights:** When adding a server to server controller ensure that you provide Administrators group user account and password. All password are stored in strong encryption in Panel database.

With server controller you can do following:

- View disk usage
- View CPU usage
- Manage services
- View/manage event logs
- View/manage IP addresses
- Reboot server
- View user accounts
- View/manage system processes

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### Manage System Processes

Control Panel support remote management of Windows based servers. You can manage system processes (running programs) on remote Windows servers.

To manage system processes navigate to the following path:



**Navigation: Home » Network Eye » Server Controller**

Select the server you want to manage and click on **Processes** tab. The detail page shows following:

- **Image Name:** This is the name of running processes. Click on the name and select **Terminate** if you wish to Kill the process. Killing a running process may have undesired results so be careful with using this option.

**To create a new process:**

- Click on the **Create New Process** button.
- Enter the new process name in the **Process name** box. Example: Messenger.
- Enter the exact part of the executable file for the process in **Working directory path**. Example: C:\Windows\Messenger.exe.

## Manage Drivers

To manage drivers navigate to the following path:



**Navigation: Home » Network Eye » Server Controller**

It displays the following listings:

- **Name :** It displays the driver name.
- **Description:** It describes the drivers.
- **Volume Name:** It shows the volume name.
- **File System:** It shows the type of the file system.
- **Size (GB):** It displays the size in GB.
- **Free Space (GB):** It displays the free space available in GB.
- **MediaType:** It displays the type of media.

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## Manage Windows Services

Control Panel support remote management of Windows based servers. You can manage windows services on remote Windows servers.

To manage Windows services navigate to the following path:



**Navigation: Home » Network Eye » Server Controller**

Select the server you want to manage and click on **Services** tab. The detail page shows following:

- **Service Name:** The name of Windows service.
- **Display Name:** The display name as it shows in service applet in Windows.
- **Status:** Current status of the service. When you take pointer here you will see 5 options:
  - Start: Click to Start the service
  - Stop: Click to Stop the service
  - Pause: Click to Pause the service
  - Resume: Click to Resume a paused service
  - Restart: Click to Restart the service
- **Start Mode:** Indicates the start mode of the service. It can be Automatic, Manual or Disabled. You can change start mode by pointing to it and selecting the mode from the pop-up menu.
- **Logon As:** Shows the rights with which the service runs.

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## Managing IP Addresses

Control Panel support remote management of Windows based servers. You can manage IP addresses on the NIC card of remote Windows servers.

To manage IP addresses navigate to the following path:



**Navigation: Home » Network Eye » Server Controller**

Select the server you want to manage and click on **IPs** tab. The detail page shows following:

- **IP Address:** Shows the IP address.
- **Subnet:** Shows subnet assigned to the IP address.
- **Remove:** Click on this option to remove the IP from NIC card.

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## Managing Event Logs

Control Panel support remote management of Windows based servers. You can manage Event Logs of remote Windows servers.

To manage event logs navigate to the following path:



**Navigation: Home » Network Eye » Server Controller**

Select the server you want to manage and click on **Event logs** tab. The detail page shows following:

- **Select Log Type:** Select Application, System or Security log. Click the **Load Log Data** button to load log.

Click **Clear Logs** button to empty logs.

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## Reboot Server

Control Panel support remote management of Windows based servers. You can reboot remote Windows servers.

To reboot server navigate to the following path:



**Navigation: Home » Network Eye » Server Controller**

Select the server you want to manage and click on **Reboot** tab. Click the **Click to Reboot** button.

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## View Users

Control Panel support remote management of Windows based servers. You can view operating system users list of remote Windows servers.

To view users list navigate to the following path:



**Navigation: Home » Network Eye » Server Controller**

Select the server you want to manage and click on **Users** tab. The detail page shows following:

- **Caption:** Shows the login name of the user account.
- **Name:** Shows full name of user account.
- **Password Expires:** Shows whether Password expiry is set for this account.
- **Disable:** True if user account login is disabled.
- **Status:** Shows current account status.

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## Server Monitoring

### Viewing Server Monitors

Control Panel supports monitoring of Windows based servers.

To view server monitors navigate to the following path:



**Navigation: Home » Network Eye » Server Monitoring**

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### How to add a Monitor

Control Panel support remote monitoring of Windows based servers.

To add a server monitor to server navigate to the following path:



**Navigation: Home » Network Eye » Server Monitoring**

Click **Add New Monitor** button. In Step 1

- **Select Server:** Select server from the drop-down list.
- **Select Monitor:** Specify the type of monitoring role e.g. disk space monitor, CPU usage monitor, FTP server monitor etc.
- **Monitor configuration:** Once you click the **Next** button, in the next step, you will be presented with series of options to configure your monitor server. Options include success & failure actions, actions triggered when monitoring server is down or up.

## Copy Monitors

To ease monitoring setup, you may copy existing monitors from an already configured server to a target server. This copies all monitors along with their actions to target server. You must be careful since this may copy monitors that may be invalid for your target server. For example, copy monitoring of E: whereas it doesn't exist on target server.

- **Copy:** Select Monitor.
- **From server:** Select server.

Then click **Copy Monitors** button. Click **Next button** for Step 2.

### Define success & failure actions for this monitor

- **Check after each:** Select Minutes, Hours or days.

### Actions Triggerred on Monitoring Alert (DOWN)

- Do Immediately
- 1 min after first error
- 3 min after first error
- Do every 5 minutes

### Actions Triggerred When Monitor Returns to OK (UP)

- Do Immediately
- 1 min after first error
- 3 min after first error
- Do every 5 minutes

In front of Actions Triggerred on Monitoring Alert (DOWN/UP) it displays the following options:

- Send Email
- Reboot server
- Start or stop service

Click **Finish** button when done.

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## Server Monitors

### Servers Monitoring Overview

Control Panel provides built-in server monitoring facility. The server monitoring engine lets you monitor wide range of services and ports on any number of remote Windows servers.

When monitoring system detects a problem, it can perform following 3 operations:

- Sends alert to configured email address
- Restart a Windows service (configurable)
- Reboot server

Following services can be monitored:

- **Disk space:** You can monitor and get notified when disk usage exceeds the threshold.
- **Memory usage:** You can monitor and get notified when memory usage exceeds the threshold.
- **Mail server:** SMTP, POP, IMAP services.
- **IIS web server:** IIS web server on port 80 is monitored.
- **FTP server:** FTP server on port 21 is monitored.
- **DNS server:** DNS server on UDP 53 is monitored.
- **Windows services:** Windows service monitored for trouble free running.
- **TCP Port:** You can enter any Port to monitor.
- **Web Page:** You can monitor web pages.

There are certain pre-requisites before you could successfully work with this module.

- **Windows Servers:** The monitored server should be running Windows operating system
- **Firewall:** If there is firewall between Panel Control Server and target server then make sure that you allow RPC port range 1024 to 5000.
- **Administrator Rights:** When adding a server to server controller ensure that you provide Administrators group user account and password. All password are stored in strong encryption in Panel database.

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## Monitor CPU Usage

Control Panel support remote monitoring of Windows based servers. To add a new monitor navigate to the following path:



Navigation: Home » Network Eye » Server Monitoring

Click **Add New Monitor** button. Select the server where you want to setup monitoring from **Select server** list and follow these instructions:

### Setting up Monitoring parameters:

- Select **CPU Usage Monitor** from Select monitor list.
- Set monitoring criteria by changing the values in **Monitor configuration** boxes. Click **Next** button.

### Setting up Monitoring actions:

- Enter the interval at which Control Panel should check monitored item in **Check after** each box.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is raised. Select from following options:
  - **Send Email:** When selected, this option will send email alerts on the configured email address.
  - **Reboot server:** This option will reboot the server when alert is raised.
  - **Start or stop service:** Selecting this option gives list of Windows services available on the target machine. You can select a service from the list to restart whenever the alert is raised.
- Select desired option and using the right-arrow button move it to the interval list on left side.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is removed (when monitored item is back to OK state). Same options are available here as with *Actions Triggered on Monitoring Alert (DOWN)* option.

Click on **Finish** button when you are done.

**Note:** Newly create monitor takes at least 5 minutes to show up in the Server Monitors list.

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## Monitor Disk Usage

Control Panel support remote monitoring of Windows based servers. To add a new monitor navigate to the following path:



Navigation: Home » Network Eye » Server Monitoring

Click **Add New Monitor** button. Select the server where you want to setup monitoring from **Select server** list and follow these instructions:

## Setting up Monitoring parameters:

- Select **Disk Space Monitor** from Select monitor list.
- Set monitoring criteria by changing the values in **Monitor configuration** boxes. Click **Next** button.

## Setting up Monitoring actions:

- Enter the interval at which Control Panel should check monitored item in **Check after each** box.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is raised. Select from following options:
  - **Send Email:** When selected, this option will send email alerts on the configured email address.
  - **Reboot server:** This option will reboot the server when alert is raised.
  - **Start or stop service:** Selecting this option gives list of Windows services available on the target machine. You can select a service from the list to restart whenever the alert is raised.
- Select desired option and using the right-arrow button move it to the interval list on left side.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is removed (when monitored item is back to OK state). Same options are available here as with *Actions Triggered on Monitoring Alert (DOWN)* option.

Click on **Finish** button when you are done.

**Note:** Newly create monitor takes at least 5 minutes to show up in the Server Monitors list.

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## Monitor DNS Server

Control Panel support remote monitoring of Windows based servers. To add a new monitor navigate to the following path:



Navigation: Home » Network Eye » Server Monitoring

Click **Add New Monitor** button. Select the server where you want to setup monitoring from **Select server** list and follow these instructions:

## Setting up Monitoring parameters:

- Select **DNS Monitor** from Select monitor list.
- Enter the DNS port number where DNS service is running. Default is port 53 (UDP).
- Click on **Next** button.

## Setting up Monitoring actions:

- Enter the interval at which Control Panel should check monitored item in **Check after each** box.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is raised. Select from following options:
  - **Send Email:** When selected, this option will send email alerts on the configured email address.
  - **Reboot server:** This option will reboot the server when alert is raised.
  - **Start or stop service:** Selecting this option gives list of Windows services available on the target machine. You can select a service from the list to restart whenever the alert is raised.
- Select desired option and using the right-arrow button move it to the interval list on left side.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is removed (when monitored item is back to OK state). Same options are available here as with *Actions Triggered on Monitoring Alert (DOWN)* option.

Click on **Finish** button when you are done.

**Note:** Newly create monitor takes at least 5 minutes to show up in the Server Monitors list.

## Monitor FTP Server

Control Panel support remote monitoring of Windows based servers. To add a new monitor navigate to the following path:



Navigation: Home » Network Eye » Server Monitoring

Click **Add New Monitor** button. Select the server where you want to setup monitoring from **Select server** list and follow these instructions:

### Setting up Monitoring parameters:

- Select **FTP Server Monitor** from Select monitor list.
- Enter the FTP server port number where FTP service is running. Default is port 21.
- Click on **Next** button.

### Setting up Monitoring actions:

- Enter the interval at which Control Panel should check monitored item in **Check after each** box.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is raised. Select from following options:
  - **Send Email:** When selected, this option will send email alerts on the configured email address.
  - **Reboot server:** This option will reboot the server when alert is raised.
  - **Start or stop service:** Selecting this option gives list of Windows services available on the target machine. You can select a service from the list to restart whenever the alert is raised.
- Select desired option and using the right-arrow button move it to the interval list on left side.
- **Actions Triggered on Monitoring Alert (UP):** Select here the actions you want the system to take when an alert is removed (when monitored item is back to OK state). Same options are available here as with *Actions Triggered on Monitoring Alert (DOWN)* option.

Click on **Finish** button when you are done.

**Note:** Newly create monitor takes at least 5 minutes to show up in the Server Monitors list.

## Monitor IIS

Control Panel support remote monitoring of Windows based servers. To add a new monitor navigate to the following path:



Navigation: Home » Network Eye » Server Monitoring

Click **Add New Monitor** button. Select the server where you want to setup monitoring from **Select server** list and follow these instructions:

### Setting up Monitoring parameters:

- Select **IIS Monitor** from Select monitor list.
- Enter the IIS server IP in **IIS server address** box.
- Set **maximum time in milliseconds** to wait for response before considering IIS down. Default is 300000 ms.

- Click on **Next** button.

## Setting up Monitoring actions:

- Enter the interval at which Control Panel should check monitored item in **Check after each** box.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is raised. Select from following options:
  - **Send Email:** When selected, this option will send email alerts on the configured email address.
  - **Reboot server:** This option will reboot the server when alert is raised.
  - **Start or stop service:** Selecting this option gives list of Windows services available on the target machine. You can select a service from the list to restart whenever the alert is raised.
- Select desired option and using the right-arrow button move it to the interval list on left side.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is removed (when monitored item is back to OK state). Same options are available here as with Actions *Triggered on Monitoring Alert (DOWN)* option.

Click on **Finish** button when you are done.

**Note:** Newly create monitor takes at least 5 minutes to show up in the Server Monitors list.

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## Monitor Mail Server

Control Panel support remote monitoring of Windows based servers. To add a new monitor navigate to the following path:



Navigation: Home » Network Eye » Server Monitoring

Click **Add New Monitor** button. Select the server where you want to setup monitoring from **Select server** list and follow these instructions:

## Setting up Monitoring parameters:

- Select **Mail Sever Monitor** from Select monitor list.
- Enter the mail server IP in **Mail Server IP** box.
- Ticket the services you want to monitor. You can monitor **POP, SMTP, IMAP** services.
- Click on **Next** button.

## Setting up Monitoring actions:

- Enter the interval at which Control Panel should check monitored item in **Check after each** box.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is raised. Select from following options:
  - **Send Email:** When selected, this option will send email alerts on the configured email address.
  - **Reboot server:** This option will reboot the server when alert is raised.
  - **Start or stop service:** Selecting this option gives list of Windows services available on the target machine. You can select a service from the list to restart whenever the alert is raised.
- Select desired option and using the right-arrow button move it to the interval list on left side.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is removed (when monitored item is back to OK state). Same options are available here as with Actions *Triggered on Monitoring Alert (DOWN)* option.

Click on **Finish** button when you are done.

**Note:** Newly create monitor takes at least 5 minutes to show up in the Server Monitors list.

## Monitor Memory Usage

Control Panel support remote monitoring of Windows based servers. To add a new monitor navigate to the following path:



Navigation: Home » Network Eye » Server Monitoring

Click **Add New Monitor** button. Select the server where you want to setup monitoring from **Select server** list and follow these instructions:

### Setting up Monitoring parameters:

- Select **Memory Usage Monitor** from Select monitor list.
- Set monitoring criteria by changing the values in **Monitor configuration** boxes. Click **Next** button.

### Setting up Monitoring actions:

- Enter the interval at which Control Panel should check monitored item in **Check after each** box.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is raised. Select from following options:
  - **Send Email:** When selected, this option will send email alerts on the configured email address.
  - **Reboot server:** This option will reboot the server when alert is raised.
  - **Start or stop service:** Selecting this option gives list of Windows services available on the target machine. You can select a service from the list to restart whenever the alert is raised.
- Select desired option and using the right-arrow button move it to the interval list on left side.
- **Actions Triggered on Monitoring Alert (UP):** Select here the actions you want the system to take when an alert is removed (when monitored item is back to OK state). Same options are available here as with *Actions Triggered on Monitoring Alert (DOWN)* option.

Click on **Finish** button when you are done.

**Note:** Newly created monitor takes at least 5 minutes to show up in the Server Monitors list.

## Monitor TCP Port

Control Panel support remote monitoring of Windows based servers. To add a new monitor navigate to the following path:



Navigation: Home » Network Eye » Server Monitoring

Click **Add New Monitor** button. Select the server where you want to setup monitoring from **Select server** list and follow these instructions:

### Setting up Monitoring parameters:

- Select **TCP Port Monitor** from Select monitor list.
- Enter the port number which you wish to monitor.
- Click on **Next** button.

### Setting up Monitoring actions:

- Enter the interval at which Control Panel should check monitored item in **Check after each** box.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is raised. Select from following options:
  - **Send Email:** When selected, this option will send email alerts on the configured email address.
  - **Reboot server:** This option will reboot the server when alert is raised.
  - **Start or stop service:** Selecting this option gives list of Windows services available on the target machine. You can select a service from the list to restart whenever the alert is raised.
- Select desired option and using the right-arrow button move it to the interval list on left side.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is removed (when monitored item is back to OK state). Same options are available here as with *Actions Triggered on Monitoring Alert (DOWN)* option.

Click on **Finish** button when you are done.

**Note:** Newly create monitor takes at least 5 minutes to show up in the Server Monitors list.

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## Monitor Windows Service

Control Panel support remote monitoring of Windows based servers. To add a new monitor navigate the following path:



Navigation: Home » Network Eye » Server Monitoring

Click **Add New Monitor** button. Select the server where you want to setup monitoring from **Select server** list and follow these instructions:

### Setting up Monitoring parameters:

- Select **Service Monitor** from Select monitor list.
- Select the service you want to monitor from the list box.
- Click on **Next** button.

### Setting up Monitoring actions:

- Enter the interval at which Control Panel should check monitored item in **Check after each** box.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is raised. Select from following options:
  - **Send Email:** When selected, this option will send email alerts on the configured email address.
  - **Reboot server:** This option will reboot the server when alert is raised.
  - **Start or stop service:** Selecting this option gives list of Windows services available on the target machine. You can select a service from the list to restart whenever the alert is raised.
- Select desired option and using the right-arrow button move it to the interval list on left side.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is removed (when monitored item is back to OK state). Same options are available here as with *Actions Triggered on Monitoring Alert (DOWN)* option.

Click on **Finish** button when you are done.

**Note:** Newly create monitor takes at least 5 minutes to show up in the Server Monitors list.

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## Monitor Web Page

Control Panel support remote monitoring of Windows based servers. To add a new monitor navigate to the following path:



Navigation: Home » Network Eye » Server Monitoring

Click **Add New Monitor** button. Select the server where you want to setup monitoring from **Select server** list and follow these instructions:

### Setting up Monitoring parameters:

- Select **Web Page Monitor** from Select monitor list.
- Enter following information:
  - **Page URL to look into:** Enter here the URL which needs to be monitored.
  - **Success Text:** Enter here the text which indicates the site is working. For example, if you enter text "content management" the monitor will try to find this text on the monitored URL. If it is not found the page will be considered down and alert will raise.
  - **Failure Text:** Enter here the text which indicates the site is down. For example, if you enter text "Page not found" the monitor will try to find this text on the monitored URL. If it is found the page will be considered down and alert will raise.
  - **Max response time (ms):** Enter here the maximum time in milliseconds to wait for response. Default is 300000 ms.
- Click on **Next** button.

### Setting up Monitoring actions:

- Enter the interval at which Control Panel should check monitored item in **Check after each** box.
- **Actions Triggered on Monitoring Alert (DOWN):** Select here the actions you want the system to take when an alert is raised. Select from following options:
  - **Send Email:** When selected, this option will send email alerts on the configured email address.
  - **Reboot server:** This option will reboot the server when alert is raised.
  - **Start or stop service:** Selecting this option gives list of Windows services available on the target machine. You can select a service from the list to restart whenever the alert is raised.
- Select desired option and using the right-arrow button move it to the interval list on left side.
- **Actions Triggered on Monitoring Alert (UP):** Select here the actions you want the system to take when an alert is removed (when monitored item is back to OK state). Same options are available here as with *Actions Triggered on Monitoring Alert (DOWN)* option.

Click on **Finish** button when you are done.

**Note:** Newly create monitor takes at least 5 minutes to show up in the Server Monitors list.

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## Monitoring Settings

### Configuring Email Alerts

You can customize the email alerts send by the monitoring system. To customize email alerts navigate to the following path:



Navigation: Home » Network Eye » Monitoring Settings

The email alerts settings page shows following:

- **Email priority:** Select the priority flag for the email.
- **MIME Type:** Default is HTML.
- **Mail from address:** Set the address that should appear in the FROM line.
- **Mail to address:** Set the address where the email should go. Example: staff@xyzhosting.com.
- **Subject:** Enter subject of the email. You can use customization keys in the subject line.
- **Body:** Set the body of the email message. Following customization keys are available.
  - **%SysIPandName%**  
Server where monitor detected the issue.
  - **%MonitorType%**  
Type of monitor that detected the issue.
  - **%MonitorCriteria%**  
Criteria which triggered alert.
  - **%MonitorStatus%**  
Typically this will be ALERT or OK.
  - **%Message%**  
Message returned from monitor.
  - **%DateTime%**  
Date and time.

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## HPM\_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:

- [Domain Name Plan Management](#)
- [Shared Hosting Plan Management](#)
- [Exchange Hosting Plan Management](#)
- [BlackBerry Hosting](#)
- [Hosted SharePoint Plan Management](#)
- [Hosted CRM Plan Management](#)
- [Lync Hosting Plan Management](#)
- [Hosted VPS Plan Management](#)
- [Miscellaneous Plan Management](#)
- [Add-ons Management](#)

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## Domain Name Plan Management

Control Panel Supports automated domain registration, renewal, and transfers with supported domain providers. Currently following domain providers are supported:

- eNom
- StarGate
- DirectI
- Offline Domain Registrar

You can add as many TLDs (Top Level Domains) to the system as you need. You can assign TLDs to appropriate domain registration supported by the system.

### To list TLDs

To create TLD navigate to following path:



**Navigation:** Home » Service Plans » Domain Name Products

Here you will see list of TLDs created in the system. Here you can disable TLD or set pricing instantly.

**Note:** To edit existing TLDs click on **Edit** link and follow the instructions on screen.

## To create TLDs

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

- **Extension:** Enter TLD name here. For example, for .COM TLD you will enter "COM" in this box.
- **Registrar:** Select the Registrar provider who handles this TLD. You may activate registrar providers from *System Configuration » Providers » Domain Registrars*.
- **Active:** Uncheck if you want to disable this product selling.
- **Is Transferable:** If this is checked then client can place transfer orders for this TLD on store front.
- **Minimum Term:** This is minimum period this TLD can be registered e.g. for .uk minimum period is 2 years.
- **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:

- Setup Price
- Price
- Discount
- Renewal Price
- Transfer Price

Enter prices in each box.

**Associate Addon:** This form lets you associate addon with your domain name. Your client may buy these addon using online store or order them through their customer control center.

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

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## Reseller Hosting Plans Management

Control Panel Supports hosting plans provisioning on supported providers. Currently following providers are supported:

- Plesk (Windows)
- Plesk (Linux)
- Helm

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

following path:



**Navigation:** Home » Service Plans » Hosting Products

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

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

- Reseller Product Listing
- Customer Product Listing
- Add-on Management

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

- **Product Type:** Select **Shared Hosting** from the drop-down list.
- **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.
- **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.
- **Product Name:** Enter the name of your product.
- **Product Comments:** Enter any comments you want to associate with this product.
- **Is Active:** Select No if you want to disable this product selling.
- **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
- **Associate Addon:** You may want to associate addon with this product. Your choices are:
  - Optional
  - Required
  - Suppressed
- **Associate Domain:** Select how you want to associate domains with this product. Your choices are:
  - Optional
  - Required
  - Suppressed
- **Date:** This is date set by the system (not editable).

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:

- Setup Price
- Price
- 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.

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

## Exchange Hosting Plan Management

### Hosted Email Plan Management

Hosted email plans are created through powerful Service Plan Wizard. To create a hosted email plan navigate to following path:



Navigation: Home » Service Plans » Exchange Hosting Products

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

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

- **Product Type:** Select **Exchange Hosting** from the drop-down list.
- **Product Name:** Enter the name of your product.
- **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.
- **Is Active:** Select No if you want to disable this product selling.
- **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
- **Associate Addon:** You may want to associate addon with this product. Your choices are:
  - Optional
  - Required
  - Suppressed
- **Associate Domain:** Select how you want to associate domains with this product. Your choices are:
  - Required
- **Date:** This is date set by the system (not editable).

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:

- Setup Price
- Price
- 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 add-on 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 add-on. If you require that the add-on is provisioned through Control Panel Provisioning System, please refer to: [Creating Add-on](#)

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

## Hosted CRM Plan Management

Hosted CRM plans are created through powerful Service Plan Wizard. To create a hosted CRM plan, navigate to following path:



**Navigation:** Home » Service Plans » CRM Products

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

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

- **Product Type:** Select **CRM Hosting Product** from the drop-down list.
- **Product Name:** Enter the name of your product.
- **Provider:** Select CRM 4.0/CRM 2011.
- **Server Group:** Select the server group where this service plan's user accounts will be setup.
- **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.
- **Is Active:** Select No if you want to disable this product selling.
- **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
- **Associate Addon:** You may want to associate add-on with this product. Your choices are:
  - Optional
  - Required
  - Suppressed

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:

- Setup Price
- Price
- Discount

Enter prices in each box.

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

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

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

## Hosted SharePoint Plan Management

Hosted SharePoint plans are created through powerful Service Plan Wizard. To create a hosted email plan, navigate to following path:



**Navigation:** Home » Service Plans » SharePoint Products

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

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

- **Product Type:** Select **Microsoft SharePoint** from the drop-down list.
- **Product Name:** Enter the name of your product.
- **Provider:** Select Microsoft SharePoint 3.0/SharePoint 2010/SharePoint 2010 Multi-tenant\ SharePoint 2013.
- **Server Group:** Select the server group where this service plan's user accounts will be setup.
- **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.
- **Is Active:** Select No if you want to disable this product selling.
- **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
- **Associate Addon:** You may want to associate add-on with this product. Your choices are:
  - Optional
  - Required
  - Suppressed
- **Associate Domain:** Select how you want to associate domains with this product. Your choices are:
  - Required
- **Date:** This is date set by the system (not editable).

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.

- **Create portal as:** Select Sub-domain Sub-Domain -OR- Vanity URL Vanity Url
- **Maximum Hosted Organizations / Site Collections:** Enter number of maximum hosted organizations\ site collections.
- **Maximum Users per Organization / Site Collection:** Enter maximum number of users.
- **Maximum Storage level for each site collection (MB):** Enter maximum number of storage level for each site collection.
- **Send warning e-mail when storage for each portal reaches (MB):** Enter storage for sending warning email.

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

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

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

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

- Setup Price
- Price
- Discount

Enter prices in each box.

**Possible Product Upgrade / Downgrade:** Here you can configure the upgrade and downgrade behavior of this product. When a product is purchased, your client may perform upgrade/downgrade from their

control center without your involvement.

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

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

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## Lync Hosting Plan Management

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



Navigation: Home » Service Plans » Lync Hosting Products

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

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

- **Product Type:** Select **Lync Hosting** from the drop-down list.
- **Product Name:** Enter the name of your product.
- **Provider:** Select Lync 2010\Lync 2010 hosting Pack\ Lync 2013.
- **Product Comments:** Enter any comments you want to associate with this product.
- **Is Active:** Select No if you want to disable this product selling.
- **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
- **Associate Addon:** You may want to associate addon with this product. Your choices are:
  - Optional
  - Required
  - Suppressed
- **Associate Domain:** Select how you want to associate domains with this product. Your choices are:
  - Optional
  - Required
  - Suppressed
- **Date:** This is date set by the system (not editable).

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

### Limits

1. **No. of SIP Domains:** Enter the no. of SIP domains or check Unlimited.
2. **Maximum number of users:** Enter the maximum no. of users or check Unlimited.

### Service Features

**Enable Persistent Chat Feature:** Check this option to enable the chat feature for the Lync account.

### Service Plans

- **Telephony:** You can select telephony option options from the drop down list.s
- **Dial Plan:** You can select dial plan from the drop down list.
- **Voice Policy:** You can select voice policy from the drop down list.
- **Conferencing Policy:** You can select conferencing policy from the drop down list.
- **Client Version Policy:** You can select client version policy from the drop down list.
- **PIN Policy:** You can select PIN policy from the drop down list.
- **External Access Policy:** You can select external access policy from the drop down list.
- **Archiving Policy:** You can select archiving policy from the drop down list.
- **Location Policy:** You can select location policy from the drop down list.
- **Client Policy:** You can select client policy from the drop down list.

Click on **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.

**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:

- Setup Price
- Price
- 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.

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## VPS Hosting Plan Management

VPS Hosting support feature allows you to add hosting products for your customers. It also allows you to create add-ons for VPS hosting products under the **Add-on Management** tab.

To view/manage VPS products navigate to the following path:



**Navigation:** Home » Service Plans » VPS Hosting

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

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

- **Product Type:** **VPS Hosting** from the drop-down list is selected.
- **Product Name:** Enter the name of your product.
- **Provider:** Select Hyper-V as a provider.
- **Server Group:** Select the desired server group from the drop down list.
- **Product Comments:** Enter any comments you to associate with this product. These comments show up on the store-front when this product is selected.
- **Is Active:** Select No if you want to disable this product selling.
- **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
- **Associate Addon:** You may want to associate addon with this product. Your choices are:
  - Optional
  - Required
  - Suppressed

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

- **Maximum VPS:** Enter the maximum number of VPS.
- **CPU Cores per VPS:** Provide no of CPU cores per VPS.
- **RAM Per VPS (MB):** Provide RAM size per VPS in MB.
- **Total Allowed Disks per VPS:** Provide total allowed disks Per VPS.

- **Disk Space per VPS (GB):** Provide disk space per VPS (GB).
- **Maximum Snapshots per VPS:** Provide no of maximum snapshots per VPS.
- **Maximum External IP Addresses per VPS:** Provide the maximum no of external IP addresses per VPS.
- **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:

- Setup Price
- Price
- 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.

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## Miscellaneous Products

Miscellaneous Product support feature allows you to add non hosting product which you only want to track for billing purposes. It can be any service or product which your company is offering to its clients. You will be able to take orders and do billing, provisioning would be manual.

To view/manage miscellaneous products navigate to the following path:



**Navigation:** Home » Service Plans » Miscellaneous Products

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

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

- **Product Type: Misc. Product** from the drop-down list is selected.
- **Product Name:** Enter the name of your product.
- **Product Comments:** Enter any comments you to associate with this product. These comments show up on the store-front when this product is selected.
- **Is Active:** Select No if you want to disable this product selling.
- **Allow Prorate:** Select Yes if you want to allow pro-rated billing (applicable only if billing system is in Pro-rate mode).
- **Associate Addon:** You may want to associate addon with this product. Your choices are:
  - Optional
  - Required
  - Suppressed

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.

**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:

- Setup Price
- Price
- 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.

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## Exchange Migration

You can migrate existing organizations, mailboxes, contact lists and distribution lists etc. from Exchange 2007 and Exchange 2010 Hosting/Non-Hosting setup, to Control Panel using Exchange Migration Toolkit. Control panel migration utility is used for importing already existing mailboxes from Exchange(2007/2010) into control panel. For example, there is a company fabricam.com which is already using their exchange solution and they want to manage their exchange functionality from control panel.

You cannot use control panel migration utility to import mailboxes which are not present in platform in which control panel is installed. As control panel migration utility only imports those organizations which exists in the platform on which control panel is installed.

Exchange migration wizard makes it easy to bulk import and create Exchange based hosted organizations.

**License Requirement:** Please note that Migration Toolkit license is required to use this wizard.

Pre-requisites:

- At least one Exchange Service Plan should be created.
- The customer account should be present.

### Post-Migration Tasks:

Verify and fix resources allocated to customer and reseller(Owner) according to actual usage.

### Import Settings

- **Select Owner:** Select owner/provider from the drop down list.
- **Select Exchange Server:** Select Exchange mailbox server from the drop down list.

### Select Organizations

- **Import:** Tick means yes.
- **Organization:** The organization available will be displayed
- **For Client:** Select the client from the drop down list.

- **Associate Service Plan:** Select the service plan from drop down list. This service plan will be sold to customer during import/migration process.
- **Options:** If you want to import click **import** link. This will take you to Step 3.

In **step 3** you are required to give the billing information:

## Billing Information

- **Organization:** Name of the organization.
- **Client:** Name of the client.
- **Billing Cycle:** Select billing cycle from the drop down list.
- **Payment Group:** Select the payment group from the list.

Then click on **Finish** button.

**Note:** Please be patient after clicking finish button as the process may take time

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## CRM Migration

You can migrate existing organizations, users etc. from CRM 4.0 to CRM 2011 setup, to Control Panel using CRM Migration Toolkit. Control panel migration utility is used for importing already existing organizations from CRM 4.0 into control panel. For example, there is a company fabricam.com which is already using their CRM and they want to manage their CRM functionality from control panel.

CRM migration wizard makes it easy to bulk import CRM based hosted organizations.

**License Requirement:** Please note that Migration Toolkit license is required to use this wizard.

### Pre-requisites:

- At least one CRM Service Plan should be created.
- The customer account should be present.

### Post-migration tasks:

Verify and fix resources allocated to customer and reseller(Owner) according to actual usage.

## Import Settings

- **Select Owner:** Select from the drop down list.
- **Select CRM Server:** Select CRM server from the drop down list.

## Select Organizations

- **Import:** Tick means yes.
- **Organization:** The organization available will be displayed
- **For Client:** Select the client from the drop down list.
- **Associate Service Plan:** Select the service plan from drop down list. This service plan will be sold to customer during import/migration process.
- **Options:** If you want to import click **import** link. This will take you to Step 3.

In **step 3** you are required to give the billing information:

## Billing Information

- **Organization:** Name of the organization.
- **Client:** Name of the client.
- **Billing Cycle:** Select billing cycle from the drop down list.
- **Payment Group:** Select the payment group from the list.

Then click on **Finish** button.

**Note:** Please be patient after clicking finish button as the process may take time

## SharePoint Migration

You can migrate existing organizations/portals, users etc. from SharePoint 3.0 to SharePoint 2010 setup, to Control Panel using SharePoint Migration Toolkit. Control panel migration utility is used for importing already existing organizations / portals from SharePoint 3.0 into control panel. For example, there is a company fabricam.com which is already using their SharePoint and they want to manage their SharePoint functionality from control panel.

Sharepoint migration wizard makes it easy to bulk import Sharepoint based hosted organizations.

**License Requirement:** Please note that Migration Toolkit license is required to use this wizard.

**Pre-requisites:**

- At least one Sharepoint Service Plan should be created.
- The customer account should be present.

**Post-migration tasks:**

Verify and fix resources allocated to customer and reseller(Owner) according to actual usage.

In the **step 1** you have to set the following import settings:

**Import Settings**

- **Select Owner:** Select from the drop down list.
- **Select SharePoint Server:** Select SharePoint server from the drop down list.

**Select Organizations**

- **Import:** Tick means yes.
- **Organization:** The organization available will be displayed
- **For Client:** Select the client from the drop down list.
- **Associate Service Plan:** Select the service plan from drop down list. This service plan will be sold to customer during import/migration process.
- **Options:** If you want to import click **import** link. This will take you to Step 3.

In **step 3** you are required to give the billing information:

**Billing Information**

- **Organization:** Name of the Portal.
- **Client:** Name of the client.
- **Billing Cycle:** Select billing cycle from the drop down list.
- **Payment Group:** Select the payment group from the list.

Then click on **Finish** button.

**Note:** Please be patient after clicking finish button as the process may take time.

## Company Profile

### Company Settings

Company profile settings are used in all the documents where company information is displayed. For example, Invoice document, Payment document, customer control center etc.



**Navigation:** Home » System Configuration » Company Profile

There are four tabs which are displayed in company profile section:

- [Company Profile Tab](#)
- [Culture Tab](#)
- [Personalization Tab](#)
- [MachPanel API Settings Tab](#)
- [Usage Reports Schedule Tab](#)

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## Company Profile

To edit company profile settings navigate to the following path:



**Navigation:** Home » System Configuration » Company Profile

### Company Profile

- **Company name:** Provide company name.
- **URL:** Provide URL.
- **Address:** Provide address.
- **City:** Provide the name of city.
- **State:** Provide the name of state.
- **Zip:** Provide zip code.
- **Country:** Provide country name.
- **Phone:** Provide phone number.
- **Billing phone:** Provide billing phone number.
- **Sales phone:** Provide sales phone number.
- **Support phone:** Provide support phone number.
- **Billing Email:** Provide billing email.
- **Sales Email:** Provide sales email.
- **Support Email:** Provide support email.
- **Billing Signature:** Provide billing signature.
- **Sales Signature:** Provide sales signature.
- **Support Signature:** Provide support signature.

Enter the necessary information in the fields and click the **Save** button.

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## 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:

- **Name:** It displays the name of the language.
- **Available/Enabled:** It shows the enabled languages.
- **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.

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## Personalization

To edit company profile settings navigate to the following path:



**Navigation:** Home » System Configuration » Company Profile

Select **Personalization** tab. It shows the following fields under *Personalization* section:

- **Control panel brand name:** Provide control panel brand name.
- **Company name:** Provide company name.
- **Company website URL:** Provide company website URL.
- **Control panel logo:** Select logo of size. 400px x 45px
- **Customer settings:** Check if you want to display customer number.

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## MachPanel API

To edit company profile settings navigate to the following path:



**Navigation:** Home » System Configuration » Company Profile

Select **MachPanel API Settings** tab, it shows the following fields under *API information* section:

- **API Login:** Provide API login.
- **API Password:** Provide API password.
- **Status:** Select enabled or disabled from the drop down list.

Click on **Save** button when done.

## Usage Reports Schedule

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



**Navigation:** Home » System Configuration » Company Profile

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

- **Report:** It shows the name of the report.
- **Send Frequency:** It shows the frequency at which reports sent.
- **From:** It shows the from address.
- **Send To:** It shows the send to address.
- **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.

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

Once done click on **Save** button.

## Layout Settings

### Theme Settings

Theme settings are used in the Control Panel. To apply or change the theme navigate to the following path:



**Navigation:** Home » System Configuration » Layout Settings » Theme Settings

It shows the following listings under *Theme Configuration* section:

- **Theme Name:** It displays the name of themes exist in Control Panel.
- **Default:** It shows whether the theme is default or not.
- **Options:** From options you can **Set As Default** your theme.

**Theme change allowed:** Check this option to allow your Reseller/Customer to change the theme.

After applying the changes click on **Update** button.

**Note:** You can also select your desired **Theme** option from the drop down list at the upper right corner.



## Menu Settings

To view/manage Menu settings navigate to the following path:



Navigation: Home » System Configuration» Layout Settings » Menu Settings

The two tabs are shown Provider/Reseller Menu and the Customer Menu:

### 1. Provider/Reseller Menu

#### Custom Url Options

- **Node Selected:** Select the node under custom URL column.
- **Node title:** Provide node title.
- **Node url:** Provide node URL
- **Show on reseller:** Check it.

And click on **Add** button.

### 2. Customer Menu

#### Custom Url Options

- **Node Selected:** Select the node under custom URL column.
- **Node title:** Provide node title.
- **Node url:** Provide node URL
- **Show on end customer of reseller:** Check it.

And click on **Add** button.

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## Built\_in Modules

To view Built-in Modules navigate to the following path:



Navigation: Home » System Configuration» Built-in Modules

#### Module Configuration Options

Web hosting module enabled	Exchange module enabled	DNS module enabled
Sharepoint module enabled	Domain module enabled	CRM module enabled
SSL module enabled	Lync module enabled	Billing module enabled
Network eye module enabled	Misc. product module enabled	Help desk module enabled
VPS module enabled	Dedicated server hosting module enabled	Online help enabled
Wireless module enabled	Migration director enabled	

Check the desired modules to enable and click on **Update Configuration** button.

## Billing Configuration

### Billing Preferences

Billing preferences are set of configurations that are supposed to be setup according to the underlying business scenarios because these settings totally depend on your business nature and customer relationship.

Billing preferences involve various settings including invoice setting and payment queue. 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 turn ON/OFF the billing system, Enable/Disable tax collection and the different document ID's to start from.

**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:

- 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).
- 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.

#### Balance sign meaning:

**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.

- Balance without brackets (customer owes money to provider)
- Balance with brackets (provider owes money to customer)

For viewing, please navigate to:



**Navigation:** Home » Billing Manager » Statements

**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.

- Balance with brackets (customer owes money to provider)
- Balance without brackets (provider owes money to customer)

For viewing, please navigate to:



**Navigation:** Home » Billing Manager » Statements

Click on the Second tab, that is "Invoice Settings" to configure invoice setting. Here, you can setup when to generate invoice and when to email it to the client and other settings.

Click on the Third tab, that is "Payment Queue Settings" to configure payment/credit card settings. Here, you can specify either to Charge or Authenticate the credit card, when to charge or how many time make an attempt to charge a credit card and similar other settings.

**Charge:** By selecting this option the payment is automatically paid and its status will be changed to

complete. For viewing, please navigate to:



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

**Authenticate Only:** When we select Authenticate only mode then payments will show in waiting capture tab.



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

Click on the Third tab, that is Payment Queue Settings & select Authenticate Only.

**Waiting Capture:** When you select this option, the payments are placed in pending for transaction tab in online payment section.

For viewing, please navigate to:



**Navigation:** Home » Billing Manager » Online Payments » Online Payments » Waiting Capture

**Automatically process orders selected to be paid offline:** By enabling this option the services will automatically be provisioned from service queue.

By disabling this option the services will not automatically provisioned from service queue. You have to provision it manually by clicking **Run** in the **Service Queue**.

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## Taxation

### 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:

- **Country:** Select the country from the drop down list.
- **State/Province:** Select the State/Province.
- **Currency:** Select the currency.
- **Date after:** Choose the after date from the calendar.
- **Date before:** Choose the before date from the calendar.

Then, click on the **Generate** button to view the Tax Report.

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## 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 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 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

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## Payment Groups

### Payment Groups

## Currencies

Currency is one of the primary means of any business, it could be different from country to country or from one geographical location to another, depending upon 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:



Navigation: Home » System Configurations » Billing Configurations » Payment Groups

## Payment Group Management

Adding a new payment group facilitates you to add new currency in the case if there is no default currency exists or you need to configure it as per your requirements.

**Note:** You can also edit existing payment group by clicking on the **Edit** link.

Click on the **Add Payment Group** button and it will take you to the interface where you can setup Payment Group according to your needs.

Fill in the information and the fields which are marked with (\*) are mandatory. Click on Next to complete the setup.

**Note:** The Currency field can NOT be changed while other fields can be edited later on.

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To setup currencies suitably and to configure them with payment gateways navigate to the following path:



**Navigation: Home » System Configurations » Billing Configurations » Payment Groups**

## Payment Group Management

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** link.

Click on the **Add Payment Group** button and it will take you to the interface where you can setup Payment Group according to your needs.

Fill in the information and the fields which are marked with (\*) are mandatory. Click on Next to complete the setup.

**Note:** The Currency field can NOT be changed while other fields can be edited later on.

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## Fraud Control

In any online business scenario, the safety and security of each transaction or any operation is the key to success. Your business is more reliable if you have strict anti-fraud or theft prevention schemes implied otherwise you may have huge degree of risk. Panel facilitates you to enforce built-in anti-fraud plug-ins to avoid any sort of theft or unauthorized access.

To configure Anti-Fraud Plug-ins, you have to navigate to the following path:



**Navigation: Home » System Configurations » Billing Configurations » Fraud Control**

There are 7 following anti-fraud plug-ins. To Enable/Disable any plug-in, check the box on the left and click

on Enable/Disable, as per your requirements. For further settings and explanation click on any of the following list.

- [Country Black List](#)
- [IP Black List](#)
- [Credit Card Black List](#)
- [Email Black List](#)
- [Domain Name Black List](#)
- [Phone Code Black List](#)
- [Zip Pattern Black List](#)

## Country Black List

Country blacklist plug-in works on an abstract level, it simply blocks the access for each access or the IP's of the specified country. You can set Add/Delete any country to/from the blacklist plug-in.

## IP Black List

IP blacklist plug-in is limited to the scope of just single IP or the specified IP range. You can add any suspected or malicious IP to/from blacklist.

**Note:** Use IP range carefully because a single digit in range can draw a big difference.

## Credit Card Black List

Credit card blacklist plug-in is significantly important to avoid any sort of unauthenticated or unauthorized use of the card, once you found any card being used illegally or suspected, so you can Add/Delete the card number to/from the blacklist.

## Email Black List

Email blacklist plug-in is similar to IP blacklist plug-in but the difference is obvious that it implies over Email address or addresses over a specified domain, this can be quite easy to restrict suspected or SPAM emails.

**Note:** Use \*@DomainName.com to block all possible emails.

## Domain Name Black List

Domain name blacklist plug-in is one step ahead then Email blacklist plug-in, you can simply Add/Delete the domain to/from the blacklist, which seems suspected or appear to be SPAM.

## Phone Code Black List

Phone code blacklist plug-in is another useful component which helps to restrict illegal or unauthorized access, by filtering phone number against the ones specified in the blacklist.

## Zip Pattern Black List

Zip pattern blacklist plug-in is similar to phone code plug-in but it is more strong as it has dual filtration by country and the pattern defined. It is quite simple to configure this plug-in by selecting a country and specifying the particular pattern to be blacklisted.

## Anti Fraud Filters

Panel facilitates you to apply full proof and comprehensive anti-fraud filters which come as the built-in source towards proactive defense. You can enable/disable and configure these anti-fraud filters by navigating to:



**Navigation:** Home » System Configurations » Billing Configurations » Anti-Fraud Filters

Here, **Threshold** is criteria of goodwill for a customer. The points will be awarded or deducted from customer repute on successful/failed order respectively.

You may enable/disable the filter as per your requirement.

### First Order Filter

This filter will be applied to a customer who has placed an order with the company for the first time. This filter may contain more strict rules to streamline a legitimate or fraud order.

You can enable/disable and configure these anti-fraud filters 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.

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## Emails Configuration

### Email Templates

The flow of handy and well managed information among different involved entities in a business is the primary goal to be achieved. As this plays a very significant role in each business operation, one of such managed piece of information could be in the form of an email or a draft, which can be your business identity for a product or any other important document. Thus, Control Panel provides you different email templates which you can modify according to your needs and trends with ease and flexibility to interact with

your customers for billing issues or any other concerns.

To setup email templates you have to navigate the following path:



**Navigation:** System Configurations » Billing Configurations » Email Configurations » Email Templates

## Email Delivery Settings

To send mails successfully, you have to provide valid SMTP details by navigating the following path:



**Navigation:** Home » System Configurations » Billing Configurations » Email Configurations » Email Delivery

**Note:** SMTP user name MUST be complete email address.

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## Email 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:

- **SMTP Server:** Set here the SMTP server you use for emails. Example: mail.xyzhost.com.
- **Port:** Set here the port number for your SMTP server. Default port is 25.
- **SMTP server requires authentication:** Enable this check box if your SMTP server requires authentication.
- **SMTP User Name:** Enter SMTP user name if SMTP authentication is ON. It is usually in user@domain.com format.
- **Password:** Enter your SMTP password.

Click **Save** when you are done.

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## Customizing Order Form

It is very easy to customize look & feel of your order forms by customizing the store template in your / Template directory. Follow the instructions below:

- Go to **/Template** folder inside your Control Panel installation folder.
- Open **Store.master** file in your favourite HTML editor, for example FrontPage. It is a good idea to take a backup before going further.
- Find following tag and replace **Header** with the HTML for the header of your order form.



```
<!--Page header html paste here-->
```

```
<div id="Header" class="HeaderFooter">Header</div>
```

```
<!-- //End page header html-->
```

- Find following tag and replace **Footer** with the HTML for the header of your order form.

```
<!--Page footer html paste here-->
```

```
<div id="Footer" class="HeaderFooter">Footer</div>
```

```
<!-- //End page header html-->
```

- To change colors, fonts, style, etc you can edit the CSS file. Go to **/App\_Themes/Store** folder and edit **Style.css** file to your taste.

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## Customizing PDF Invoices

PDF invoices are generated from an HTML template. To customize the PDF invoice, follow the instructions below:

- Go to **/Template** folder inside your Control Panel installation folder.
- Open **Invoice.htm** file in your favourite HTML editor, for example FrontPage. It is a good idea to take a back before going further.
- When editing the template ensure that you do not change **%variables%** (contained in % sign).

**Note:** You must take special care when editing the following section. It must remain intact otherwise the PDF template will be broken.

```
%%GenerateRows%%
```

```
<tr>
```

```
<td align="center">%packageName%</td>
```

```
<td align="center">%packageCycle%</td>
```

```
<td align="center">%invoicedPeriod%</td>
```

```
<td align="center">01</td>
```

```
<td align="center">%packagePriceBeforeDiscount%</td>
```

```
<td align="center">%packageSetupFee%</td>
```

```
<td align="center">%packageDiscountPercent%</td>
```

```
<td align="center">%packagePriceAfterDiscount%</td>
```

```
</tr>
```

```
%% / GenerateRows%%
```

Save the file when you are done.

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## 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.

- Company Variable:** These are set of company related variables.
- Customer Variables:** These are set of customer related variables.

- **Group Variables:** These are specific to email group you are editing. For example, when editing Package Information Group emails you will see variables like %packageName%, %subscriptionID% etc.

To customize email template navigate to the following path:



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

The Email Templates screen shows the following:

- **Operations:** Under this box you set the email addresses for the email group. You can configure different email addresses for each email group.

Click **Edit Template** button for the template you wish to customize. The edit template screen shows following:

- **Change email template name:** Friendly name. You don't need to change this setting.
- **Locale Language:** Set the language locale for your email.
- **Email priority:** Set the priority flag for your email.
- **Subject:** This is the subject with which the email is sent. You can use variables in the subject line too.
- **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.
- **Kill Template:** Enable this check box if you want to suppress the email template. In this case the email will always be bypassed.

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

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## Providers

### Hosting Panels

#### Hosting Panels

Control Panel supports all popular hosting control panels in the market. This includes Hostmatic Control Server. To view the list of available hosting panel providers, navigate to:



**Navigation:** Home » Service Director » System Configuration » Providers » Hosting Panels

It shows the following listing:

Logo	Provider	Integration status	Status
	Hostmatic Control Server ( <a href="#">Learn More..</a> )	Stable	Enabled

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## Domain Registrars






### Domain Registrars

There is ever growing list of domain registrars supported by Control Panel. This includes eNom, DirectI, PKNIC and Stargate. To view the list of available hosting panel providers, navigate to:



Navigation: [Home](#) » [System Configuration](#) » [Providers](#) » [Domain Registrars](#)

You may configure your required provider by clicking on the **Configure** link.

Logo	Domain Registrars	Integration Status	Status	Options
	<a href="#">Direct I</a>	Stable	Enabled	<a href="#">Configure</a> <a href="#">Disable</a>
	<a href="#">eNom</a>	Stable	Enabled	<a href="#">Configure</a> <a href="#">Disable</a>
	<a href="#">Offline Domain Registrar</a>	Stable	Enabled	<a href="#">Configure</a> <a href="#">Disable</a>
	<a href="#">OpenSRS</a>	Stable	Enabled	<a href="#">Configure</a> <a href="#">Disable</a>
	<a href="#">StarGate</a>	Stable	Enabled	<a href="#">Configure</a> <a href="#">Disable</a>

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### DirectI

In order to configure DirectI domain registrar navigate to the following path:



Navigation: [Home](#) » [System Configuration](#) » [Providers](#) » [Domain Registrars](#)

Click on the **Configure** link and follow the instructions below:

- **Provider:** Friendly name for this provider. No need to change this field.
- **Enable DirectI( Logic Boxes):** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
- **Enable Test Mode:** Select YES if you want to perform test domain registrations.
- **Test mode User name:** Enter your DirectI reseller login ID.
- **Test mode Password:** Enter your DirectI reseller password.
- **Test mode Parent ID:** Enter your DirectI Parent ID.Contact DirectI or its reseller for the ID.
- **Allow Transfer:** Will you allow domain transfer? Select Yes.
- **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
- **Parked Domain Name Servers:** Select the name servers assigned by default to domain registrations.
- **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.
- **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.
- **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.
- **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.

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## Stargate

To configure Stargate domain registrar navigate to the following path:



Navigation: Home » System Configuration » Providers » Domain Registrars

Click on the **Configure** link and follow the instructions below:

- **Provider:** Friendly name for this provider. No need to change this field.
- **Enable Stargate :** 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.
- **Enable Test Mode:** Select YES if you want to perform test domain registrations.
- **Test mode User name:** Enter your Stargate reseller login ID.
- **Test mode Password:** Enter your Stargate reseller password.
- **Test mode Parent ID:** Enter your Stargate Parent ID.
- **Allow Transfer:** Will you allow domain transfer? Select Yes.
- **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
- **Parked Domain Name Servers:** Select the name servers assigned by default to domain registrations.
- **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.
- **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.
- **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.
- **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.

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## eNom

To configure eNom domain registrar navigate to the following path:



Navigation: Home » System Configuration » Providers » Domain Registrars

Click on the **Configure** link and follow the instructions below:

- **Provider:** Friendly name for this provider. No need to change this field.
- **Enable eNom :** Select NO only if you want to disable the registrar. This will result in removal of TLDs assigned to this registrar from order forms and prevents system from renewing these TLDs.
- **Enable Test Mode:** Select YES if you want to perform test domain registrations.
- **Test mode User name:** Enter your eNom reseller login ID.
- **Test mode Password:** Enter your eNom reseller password.
- **Test mode Parent ID:** Enter your eNom Parent ID.
- **Allow Transfer:** Will you allow domain transfer? Select Yes.
- **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
- **Parked Domain Name Servers:** Select the name servers assigned by default to domain registrations.
- **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.
- **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.
- **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.
- **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:

- Log into your eNom reseller account, click on left menu option Help then, eNom **Support Center** link.
- Click the request help feature from Support Center tool.
- Send your login name and the IP address you want added to the live environment.
- You will receive a confirmation email with the case assigned.
- eNom will reply back via the assigned case when it's completed.

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## OpenSRS

To configure OpenSRS domain registrar navigate to the following path:



**Navigation:** Home » System Configuration » Providers » Domain Registrars

Click on the **Configure** link and follow the instructions below:

- **Provider:** Friendly name for this provider. No need to change this field.
- **Enable OpenSRS :** 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.
- **Enable Test Mode:** Select YES if you want to perform test domain registrations.
- **User name:** Enter your OpenSRS reseller login ID.
- **Password:** Enter your OpenSRS reseller password.
- **Confirm Password:** ReEnter your password.
- **API key:** Enter API key.
- **Allow Transfer:** Will you allow domain transfer? Select Yes.
- **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
- **Parked Domain Name Servers:** Select the name servers assigned by default to domain registrations.
- **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.
- **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.
- **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.
- **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.

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## Offline Domain Registrar

To configure Offline Domain Registrar navigate to the following path:



**Navigation:** Home » System Configuration » Providers » Domain Registrars

Click on the **Configure** link and follow the instructions below:

- **Provider:** Friendly name for this provider. No need to change this field.
- **Enable Offline Domain Registrar :** 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.

- **Enable Test Mode:** Select YES if you want to perform test domain registrations.
- **Test mode User name:** Enter your Offline Domain Registrar reseller login ID.
- **Test mode Password:** Enter your Offline Domain Registrar reseller password.
- **Test mode Parent ID:** Enter your Offline Domain Registrar Parent ID.
- **Allow Transfer:** Will you allow domain transfer? Select Yes.
- **Allow Change Contact Info:** Will you allow user to change domain contact info? Select Yes.
- **Parked Domain Name Servers:** Select the name servers assigned by default to domain registrations.
- **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.
- **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.
- **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.
- **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.

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## Payment Gateways

### Payment Gateways












Payment gateway is an important third-party component/module among different business environment where online payments are concerned. As there are many factors involved in making an online transaction including the safety and security of confidential credentials and a trusted link to carry the transaction. Thus by introducing some trusted and secure way to make online transaction, payment gateways are needed yet there are number of such gateways exist but at the platform of Control Panel you will be able to induce the only the supported gateways.

To configure any of the available payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.



**Navigation:** Home » System Configurations » Providers » Payment Gateways

For editing the settings on the gateways, click on **Configure** link.

Logo	Payment Gateways	Integration Status	Option
	<a href="#">2Checkout</a>	Stable	<a href="#">Configure</a>
	<a href="#">Authorize.net</a>	Stable	<a href="#">Configure</a>
	<a href="#">PayPal</a>	Stable	<a href="#">Configure</a>
	<a href="#">Beanstream</a>	Stable	<a href="#">Configure</a>
	<a href="#">ESselectPlus</a>	Stable	<a href="#">Configure</a>
	<a href="#">Mollie</a>	Stable	<a href="#">Configure</a>
	<a href="#">Payment Junction</a>	Stable	<a href="#">Configure</a>
	<a href="#">Raven</a>	Stable	<a href="#">Configure</a>
	<a href="#">Virtual Card Services</a>	Stable	<a href="#">Configure</a>
	<a href="#">SoEasyPay</a>	Stable	<a href="#">Configure</a>
	<a href="#">St. George</a>	Stable	<a href="#">Configure</a>

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## 2Checkout

To configure 2Checkout as your payment gateway navigate to the following path:



**Navigation: Home » System Configuration » Providers » Payment Gateways**

Click on the **Configure** link and follow the instructions below:

- **Provider:** Shows the name of provider you are configuring. Not editable.
- **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
- **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
- **Merchant ID:** Enter your 2Checkout merchant ID.
- **API URL:** Defaults to <https://www.2checkout.com/2co/buyer/purchase?>. Usually you don't need to change this.
- **Validate Gateway Response:** Enable this checkbox if you want to validate gateway response with a validation code you provide.
- **Validation Code:** Enter the validation code to validate gateway response. You must login to your 2checkout merchant control center to retrieve this code.
- **Text to show if selected:** Type necessary text.

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:

- Login to your 2Checkout.com control center.
- Scroll down and click **Look & Feel** settings under **Helpful Links**.

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.

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## Authorize.NET

To configure Authorize.NET as your payment gateway, navigate to the following path:



**Navigation: Home » System Configuration » Providers » Payment Gateways**

Click on the **Configure** link and follow the instructions below:

- **Provider:** Shows the name of provider you are configuring. Not editable.
- **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
- **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
- **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.
- **API Transaction Key:** You must login to your Authorize.NET account to retrieve this key. It should be under Account Settings.
- **API URL:** Defaults to <https://secure.authorize.net/gateway/transact.dll>. Usually you don't need to change this.
- **Validate Gateway Response:** Enable this checkbox if you want to validate gateway response with a validation code you provide.
- **Validation Code:** Enter the validation code to validate gateway response. You must login to your Authorize.NET account to retrieve this code.

- **Text to show if selected:** Type necessary text.

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## PayPal

**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.

- Log in to your PayPal Business account.
- Click **My Account**.
- Click **Profile**.
- Under Account Information, click **API Access**.
- Click **Request API Credentials**.
- Click **API Signature**.
- Click the **Agree** checkbox.
- Click **Submit**.

To configure PayPal as your payment gateway, navigate to the following path:



**Navigation: Home » System Configuration » Providers » Payment Gateways**

Click on the **Configure** link and follow the instructions below:

- **Provider:** Shows the name of provider you are configuring. Not editable.
- **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
- **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
- **API User Name:** Enter your PayPal API username.
- **API Password:** PayPal API password.
- **API Signature:** Enter your PayPal signature.
- **API URL:** Defaults to <https://www.paypal.com/cgi-bin/webscr?>. Leave it same.
- **Text to show if selected:** Type necessary text.

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## BeanStream

To configure BeanStream as your payment gateway, navigate to the following path:



**Navigation: Home » System Configuration » Providers » Payment Gateways**

Click on the **Configure** link and follow the instructions below:

- **Provider:** Shows the name of provider you are configuring. Not editable.
- **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
- **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
- **Merchant ID:** Enter your BeanStream merchant ID.

Click **Save** when you are done.

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## ESselectPlus

To configure ESselectPlus as your payment gateway navigate to the following path:



**Navigation: Home » System Configuration » Providers » Payment Gateways**

Click on the **Configure** link and follow the instructions below:

- **Provider:** Shows the name of provider you are configuring. Not editable.
- **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
- **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

- **API Token:** Enter your ESselectPlus API Token.
- **Store ID:** Enter the store id.
- **API URL:** Enter the API url.
- **Text to show if selected:** Type necessary text.

Click **Save** when you are done.

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## Mollie

To configure Mollie as your payment gateway navigate to the following path:



**Navigation: Home » System Configuration » Providers » Payment Gateways**

Click on the **Configure** link and follow the instructions below:

- **Provider:** Shows the name of provider you are configuring. Not editable.
- **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
- **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
- **Partner ID:** Enter your Mollie partner ID.

Click **Save** when you are done.

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## Payment Junction

To configure any of the available payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.



**Navigation: Home » System Configurations » Providers » Payment Gateways**

For editing the settings on the gateways, click on **Configure** link.

- **Provider:** Shows the name of provider you are configuring. Not editable.
- **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from

- charging bills through this gateway.
- **Enable Test Mode:** Select YES if you want to perform test transaction. No credit card is charged in this case, so be careful.
- **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.
- **API Password:** You must login to your Payment Junction account to retrieve this key. It should be under Account Settings.
- **API URL:** Defaults to [www.payjunctionlabs.com](http://www.payjunctionlabs.com).
- **Text to show if selected:** Provide text.

Click on **Save** button when done.

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## Raven

To configure any of the available payment gateways, you will have to navigate to the following path, where you can Edit the settings according to your requirements.



**Navigation:** Home » System Configurations » Providers » Payment Gateways

For editing the settings on the gateways click on **Configure** link.

*Provider Status* section shows the following fields:

- **Provider:** Shows the name of provider you are configuring. Not editable.
- **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
- **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:

- **User name:** Provide the user name.
- **Shared Secret:** Provide shared secret.
- **PRN (Payment Routing Number):** Provide payment routing number (PRN).
- **Text to show if selected:** Provide text.

Click on **Save** button when done.

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## Virtual Card Services VCS

To configure VCS as your payment gateway navigate to the following path:



**Navigation:** Home » System Configurations » Providers » Payment Gateways

Click on the **Configure** link and follow the instructions below:

- **Provider:** Shows the name of provider you are configuring. Not editable.
- **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
- **Terminal-Id/User-Id:** Provide the Terminal-id/user-id.
- **Gateway Url:** It is the Gateway URL. You don't need to change this URL. <https://www.vcs.co.za/>

vvonline/ccxmlauth.asp

- **Text to show if selected:** Type necessary text.

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## SoEasyPay

To configure SoEasyPay as your payment gateway navigate to the following path:



**Navigation:** Home » System Configurations » Providers » Payment Gateways

Click on the **Configure** link and follow the instructions below:

- **Provider:** Shows the name of provider you are configuring. Not editable.
- **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
- **Terminal-Id/User-Id:** Provide the Terminal-id/user-id.
- **Gateway Url:** It is the Gateway URL. You don't need to change this URL. <https://secure.soeasypay.com/gateway.aspx>
- **Text to show if selected:** Type necessary text.

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## ST. George

To configure St.George as your payment gateway navigate to the following path:



**Navigation:** Home » System Configurations » Providers » Payment Gateways

Click on the **Configure** link and follow the instructions below:

- **Provider:** Shows the name of provider you are configuring. Not editable.
- **Enabled:** Select NO only if you want to disable the payment gateway. This will prevent system from charging bills through this gateway.
- **Server:** Type the server of the St.George. i.e. [www.gwipg.stgeorge.com.au](http://www.gwipg.stgeorge.com.au)
- **Port:** Enter the port number of the St.George.
- **Customer ID:** Enter customer Id of the test account.
- **Certificate:** Enter certificate number.
- **Password:** Enter password.
- **Text to show if selected:** Type necessary text.

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## Exchange Servers

To configure Exchange Server 2007/2010 Hosting/Non-Hosting as your exchange based hosted email service provider, navigate to the following path:



**Navigation:** Home » System Configuration » Providers » Microsoft Exchange

It shows the following listing:

- **Provider:** Microsoft Exchange 2007, Microsoft Exchange 2010 Hosting, Microsoft Exchange 2010 Non-hosting & Microsoft Exchange 2013.
- **Integration Status :** It displays the integration status.
- **Status:** It shows that the server is enabled or disabled.

Make sure that the provider status shows *Tick* mark and **Enabled** sign.

**Note:** You can Enable/Disable the Exchange Server 2007/2010 Hosting/Non-Hosting by clicking the Enable/Disable Provider button.

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## SharePoint Servers

To configure Windows SharePoint Services as your SharePoint service provider navigate to the following path:



**Navigation:** Home » System Configuration » Providers » Microsoft SharePoint

It shows the following listing:

- **Provider:** Microsoft SharePoint 3.0, SharePoint 2010, SharePoint Multi-tenant 2010, and SharePoint 2013.
- **Integration Status :** It displays the integration status.
- **Status:** It shows that the server is enabled or disabled.

Make sure that the provider status shows *Tick* mark and **Enabled** sign.

**Note:** You can Enable/Disable the Windows SharePoint Services 3.0/2010 by clicking the Enable/Disable Provider button.

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## CRM Server

You can disable/enable CRM Providers by clicking on the Disable/Enable Provider button after navigating to:



**Navigation:** Home » System Configuration » Providers » CRM Providers

It shows the following listing:

- **Provider:** It displays the Microsoft CRM 4.0/2011.
- **Integration Status :** It displays the integration status.
- **Status:** It shows that the server is enabled or disabled.

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## Wireless Services

You can disable/enable Wireless Services by clicking on the Disable/Enable Provider button after navigating to:



**Navigation:** Home » System Configuration » Providers » Wireless Services

It shows the following listing:

- **Provider:** It displays BlackBerry 4.0, BES 5, BES 10 and BlackBerry 5.0 Express.
- **Integration Status :** It displays the integration status.
- **Status:** It shows that the server is enabled or disabled.

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## Lync Server

To view the Lync Server navigate to the following path:



**Navigation:** Home » System Configuration » Providers » Lync Server

Microsoft Lync server 2010, Microsoft Lync 2010 Hosting Pack & Microsoft Lync 2013 is supported by Control Panel. It shows the following listing:

- **Provider :** It displays the Microsoft Lync Server.
- **Integration Status :** It displays the integration status.
- **Status:** It shows that the server is enabled or disabled.

**Note:** You can Enable\Disable provider on clicking the **Enable\Disable** button.

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## VPS Provider

You can disable/enable Microsoft Hyper-V Server by clicking on the Disable/Enable Provider button after navigating to:



**Navigation:** Home » System Configuration » Providers » VPS Hosting

It shows the following listing:

- **Provider:** It displays the **Microsoft Windows Server R2 Hyper-V & Microsoft Hyper-V Windows Server 2012.**
- **Integration Status:** It displays the integration status.
- **Status:** It shows that the server is enabled or disabled.

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## FTP Server

Control Panel provides support for variety of FTP providers including Microsoft FTP, MS FTP 7.5, Gene6 FTP and Filezilla to name a few. To view the list of available FTP providers navigate to the following path:



**Navigation:** Home » System Configuration » Providers » FTP Server

It shows the following listing:

- **Provider** : It displays the Microsoft FTP, Microsoft FTP 7.5, Gene6 FTP and Filezilla Server.
- **Integration Status** : It displays the integration status.
- **Status**: It shows that the server is enabled or disabled.

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## Database Server

Control Panel supports all popular databases in the market. This includes MS SQL Server 2000/2005/2008 and MySQL. To view the list of available database providers navigate to the following path:



**Navigation:** Home » System Configuration » Providers » Database Server

It shows the following listings:

- **Provider** : It displays the SQL Server 2000/2005/2008 and MySQL.
- **Integration Status** : It displays the integration status.
- **Status**: It shows that the server is enabled or disabled.

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## DNS Server

For a list of DNS servers along with status corresponding to particular DNS server can be viewed at:



**Navigation:** Home » System Configuration » Providers » DNS Server

It shows the following listings:

- **Provider** : It displays the Microsoft DNS and Simple DNS Plus.
- **Integration Status** : It displays the integration status.
- **Status**: It shows that the server is enabled or disabled.

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## Web Server

To view the list of available Web servers navigate to:



**Navigation:** Home » System Configuration » Providers » Web Server

It shows the following listing:

- **Provider** : It displays the Internet Information Server 6 and 7.
- **Integration Status** : It displays the integration status.
- **Status**: It shows that the server is enabled or disabled.

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## Mail Server

Several mail servers are supported by Control Panel that comprise of Mail Enable, Merak Mail, and SmarterMail etc. To view the list of available mail providers, navigate to:



**Navigation:** Home » System Configuration » Providers » Mail Server

It shows the following listing:

- **Provider** : It displays the Mail Enable 3.0, Merak Mail 9.2.1, and SmarterMail 5.x, 6.x and 8.x Server.
- **Integration Status** : It displays the integration status.
- **Status**: It shows that the server is enabled or disabled.

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## Stats Server

To view the list of available providers navigate to the following path:



**Navigation:** Home » System Configuration » Providers » Stats Server

It shows the following listing:

- **Provider** : It displays the SmarterStats Server.
- **Integration Status** : It displays the integration status.
- **Status**: It shows that the server is enabled or disabled.

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## SSL Vendors

To view list of SSL vendors that can be enabled or disabled navigate to the following path:



Navigation: Home » System Configurations » Providers » SSL Vendors

It shows the following listing:

- **Provider** : It displays the DigiCert and Offline SSL provider
- **Integration Status** : It displays the integration status.
- **Status**: It shows that the server is enabled or disabled.

Click on [Configure](#) link in front of the SSL vendor and provide the following:

- **Provider**: It shows the SSL vender name for e.g DigiCert.
- **Customer Name**: Provide customer name.
- **Customer Account#**: Provide the customer account number.
- **API Key**: Provide API key.

Click on **Save** when done.

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## Notifications

This is an announcement facility that is provided to facilitate display of major announcements, alerts and notifications right at the dashboard or on the login page. For example, when invoices are sent automatically, account expiry alerts, suspension alerts etc.

To view list of notifications that would display at the login or dashboard, navigate to following path:



Navigation: Home » System Configuration » Notifications

**Note:** You may modify or remove existing notifications by clicking on **Edit** or **Delete** respectively.

You can include new notifications by clicking at the **Add Notification** button. Simply, fill in the following necessary fields and click **Save** to continue:

- **Title**: Main head for the notification.
- **Notification**: Description of corresponding notification goes here.
- **Start Date**: Select the start date from which the notification will become active.
- **End Date**: Specify the end date after which the notification will be de-activated automatically.
- **Visible To**: Select transparency level e.g. notification visible to reseller, customer or not.
- **Display Area**: Select your desired placement for notification to appear, either at the login or at the dashboard or both.

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## Store Configuration

### Setting Up Order Form

Control Panel provides built-in store front for online sale of services. You can launch Store using Order Form. You have option to create multiple store portals (order forms). These order forms enable you to sell your products and bill them by presenting a front end / store front to the customer. It is very easy to build an online store using Control Panel's Store Order Form. Using order forms you can sell products, charge credit card and provision services.

This online store enables users to select services you offer on the online store, it allows them to create new accounts or use their existing account to purchase services. It allows new customers to select services, make their account and pay for the purchased services in the same go. They can choose different products and services using this very self-intuitive web interface.

You may create unlimited number of order forms in Control Panel each branding for different set of product and currencies.

To setup order form navigate to the following path:



**Navigation: Home » System Configuration » Store Configuration**

**Note:** You may also edit the existing order form by clicking on the **Edit** link.

Click **New Order Form** button and follow the instructions below:

- **Order Form Name:** The name for your order form.
- **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.
- **Domain option:** Select whether domain purchasing will be available on the form or not.
- **Pay by Cheque Allowed:** Select Yes if you want to allow Cheque payment on checkout.
- **Pay by Bank Draft Allowed:** Select Yes if you want to allow Bank draft payment on checkout.
- **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.
- **Continue Shopping URL:** Enter the URL where you want to take user when **Continue Shopping** button on the form is clicked.
- **Terms URL:** Enter the URL where terms of service is available.
- **Products sold through this Order Form:** Select the products you wish to sell via the order form you are setting up.

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

Once the order form is set up, you will see **Launch Store** link. Click on the link to launch the newly configured store. Copy the URL from the address bar of the newly opened window of store front page and publish it on the web. The URL is same as the control panel URL with additional parameters like store ID.

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## System Users

### 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](#)

There are couple of pre-defined roles that come packaged with Control Panel. These roles include:

- **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.
- **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.
- **Help Desk Administrator:** This role can access only Help Desk section of the system.
- **Network Administrator:** This role can access only *Network Eye* section.

You cannot edit default roles but you can create new roles and assign them to your staff members.

To create a new role, click **Add New Role** button and follow the instructions below:

- **Role Name:** Enter the name for this role.
- **Role Description:** Enter some description here.
- **Features Access:** Click the check boxes to define which system areas this role can access.

Click **Save** button when finished.

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## 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](#)

The list of staff users displays following:

- **Name:** The full name of staff user.
- **Email:** The email address of staff user. It is also the login ID for staff user.
- **Last Login:** Shows the last login date and time.
- **Last Login IP:** Shows the IP from where this user logged-in.
- **Role:** Shows the Role(s) assigned to the user.

**Note:** You can edit an existing staff user by clicking on the **edit** link.

To create a staff user, click **Add Staff Member** button and follow the instructions below:

- **Passport Login:** Enter the email address of user. This is used as login for the system.
- **Passport Password:** Enter a password for the staff member.
- **Primary Contact:** Here only First Name and Last Name fields are compulsory.
- **Roles:** Select the Roles you want to assign to staff user.

Click **Save** button when finished.

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## 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.

- **IP LockDown for the staff:** Check this option to enable lock for staff and click on **Save** button.
- **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.

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## License Management

### Updating License Key

Each Control Panel installation is identified by a unique Installation ID which is a 20 digit alpha-numeric number in xxxx-xxxxx-xxxxx-xxxxx format. When you place order (license, upgrades, SSA etc) you will be asked for your Installation ID. Upon completion of your purchase your software license will automatically update. You can also update your license manually.

To manually update **Control Panel license** navigate to the following path:



Navigation: Home » System Configuration » License Management » Control Panel Licenses

Click the **Update License** button.

To manually update **remote license** navigate to the following path:



Navigation: Home » System Configuration » License Management » Remote Licenses

Click the **Update License** button.

Click on the **License ID** of the remote server.

#### License Information

- **License ID:** It shows the License ID for e.g. EjadSPMRs-D7B658E6CB.
- **License Assigned to:** Provide the name of the user.
- **Expiry:** Provide the expiry date.
- **License Status:** It shows the statue oft he license for e.g. Active.

#### Binding

- **Bind License to:** Provide to which the license is bind.

Then click on **Save** button.

Similarly, for **Enterprise Extensions** navigate to the following path:



Navigation: Home » System Configuration » License Management » Enterprise Extensions

Click the **Update License** button.

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## How Does Licensing Work

Control Panel licenses are activated from central licensing servers. Control Panel periodically connects with licensing server to validate your installed licenses. Once license is validated a local key is generated and your software continues working. During the time local key is valid your software will continue working without dependence on the license server.

You have to make sure that outgoing HTTP calls are allowed from the Control Panel server. If Control Panel is unable to connect to licensing server for over 7 days then it may cease functioning.

If Control Panel primary license server goes down, it will try to backup license server automatically. License servers are geographically distributed and independent of each other.

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