CONTROL PANEL

INTRODUCTION AND SUPPORT

Control Panel 2011 Customer Support Guide

CONTENTS

INTRODUCTION

Welcome to your introduction to the Control Panel. This guide will form your Control Panel Training Programme and is designed to provide you with the foundation knowledge required to be able to administer your account.

AIM

To provide an introduction to the Control Panel and ensure that customers are easily able to navigate through the various menus available and are confident in successfully administrating their account.

WHAT WILL A CUSTOMER USE THE CONTROL PANEL FOR?

You will use the Control Panel to:

- Manage Account Contacts and Account Information
- Manage Users, Logins, Roles and Passwords
- Create, View, Make and Manage Payments and Invoices
- View Subscriptions

GLOSSARY OF TERMS

TERM	WHAT DOES IT MEAN?
Control Panel	Control Panel is the system in which the customer account can be managed, viewed, changed or added to. The Control Panel will be used by you for your Hosted Applications. By default this is called the Customer Control Panel
Server	A server is simply a computer that provides services or resources to other computers.
Service Provider	A service provider is an entity that provides services to other entities. Usually this refers to a business that provides subscription or web service to other businesses or individuals. Examples of these services include Internet access, Mobile phone operator, and web application hosting. Outsourcery is a Service Provider!
Organisation	An Organisation is a Company created within Control Panel. You will find Organisations attached to Reseller accounts as these will be customers of the Reseller as opposed to a direct customer of Outsourcery.
Reseller	A Reseller is a customer who buys services in bulk from Outsourcery and resells these onto their customers (Organisations).
User	A User is an End User of a Reseller or an Organisation. Channel Services will not deal with a User as per the standard Business process.
IP Address	IP Address is an 'Internet Protocol' Address. This is a numerical identification that is assigned to a web address which indicates where the address is.
Services	Services are hosted products such as CRM, SharePoint, Blackberry/Windows mobile, and Hosted Exchange etc.
Provision	This is the term used to refer to the creation and set up of an account.
Resources	Refers to the number of services the user has.

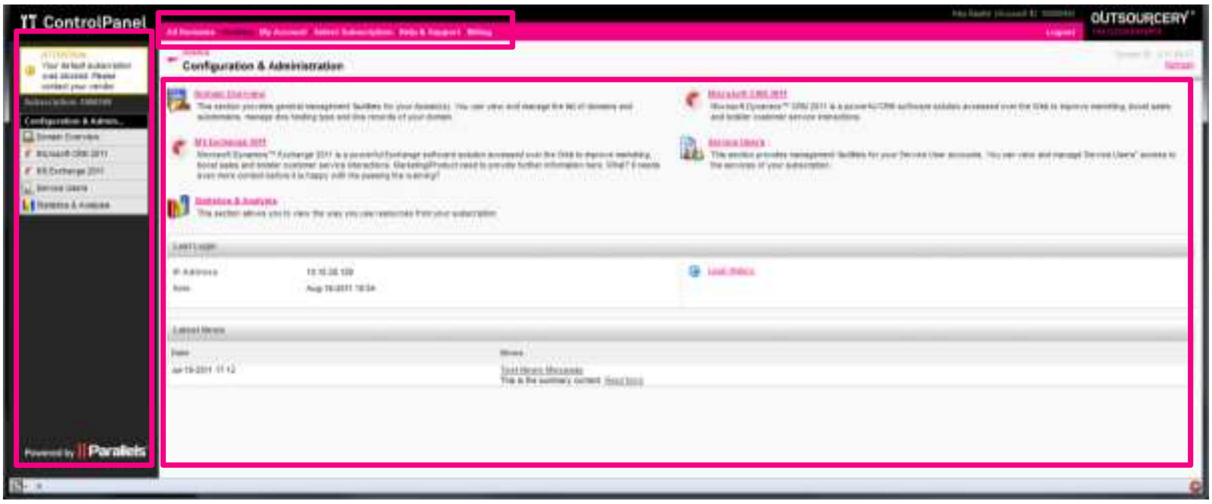
HOW DO I ACCESS THE CONTROL PANEL?

1. Navigate to https://controlpanel.outsourcery.co.uk
2. Enter your username
3. Enter your password
4. Click **Login** to login

You will now have access to the Customer Control Panel or CCP for short.

CONTROL PANEL TOOLS AND ICONS

The control panel displays:



TOP FRAME/SYSTEM TOOLBAR

The Top frame is located in the upper part of the interface window and contains the system toolbar. A number of clickable service icons are aligned to the left side of the top frame and represent the system toolbar. The following icons are present in the system toolbar (some icons may not be present initially):

- All Domains – Any domains that have been registered or registered as part of a subscription will be displayed here.
- My Account – This section allows you to administer your account. You can manage: roles, address details, users, account contacts and password policies.
- Help & Support – This will open the support section of the CCP. Not shown but will be available
- Billing - Clicking this icon directs you to your ordering and billing site.
- Logout - Clicking this icon terminates your current session and logs you out of the system. Not shown but will be available

LEFT HAND FRAME/NAVIGATION MENU

This provides links to the different areas of functionality within the control panel. The content displayed on the Main Frame will reflect the link clicked on this Navigation Menu. Generally the links here are the same links that are displayed on the Main Area (Frame) of the page.

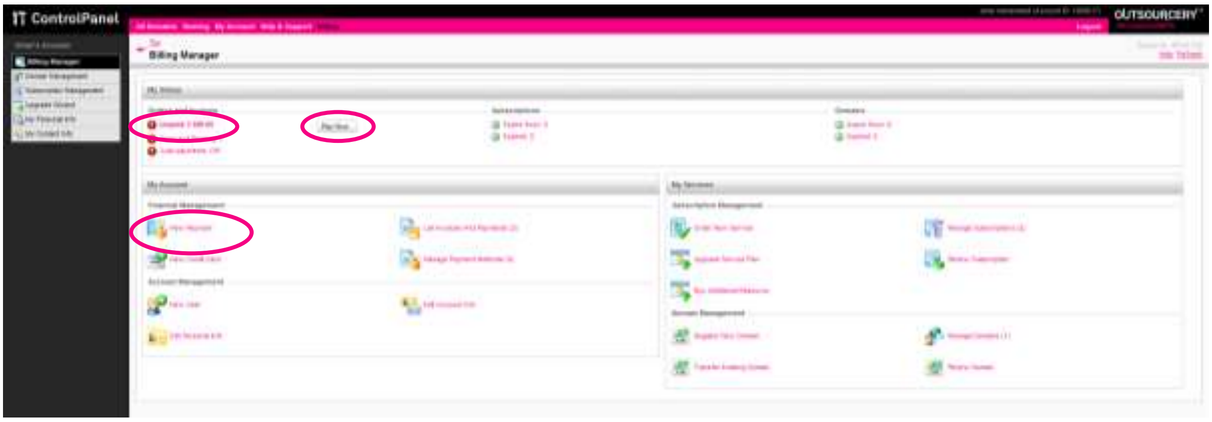
MAIN FRAME

The content displayed here relates to the different options selected via the Navigational Menu and the system toolbar.

PAY FOR SERVICES VIA CREDIT/DEBIT CARD

If you would like to make a payment via credit or debit card then you can perform the following steps:

1. Login or ensure you are currently logged into the Control Panel
2. Click on **Billing**
3. You will see the following screen

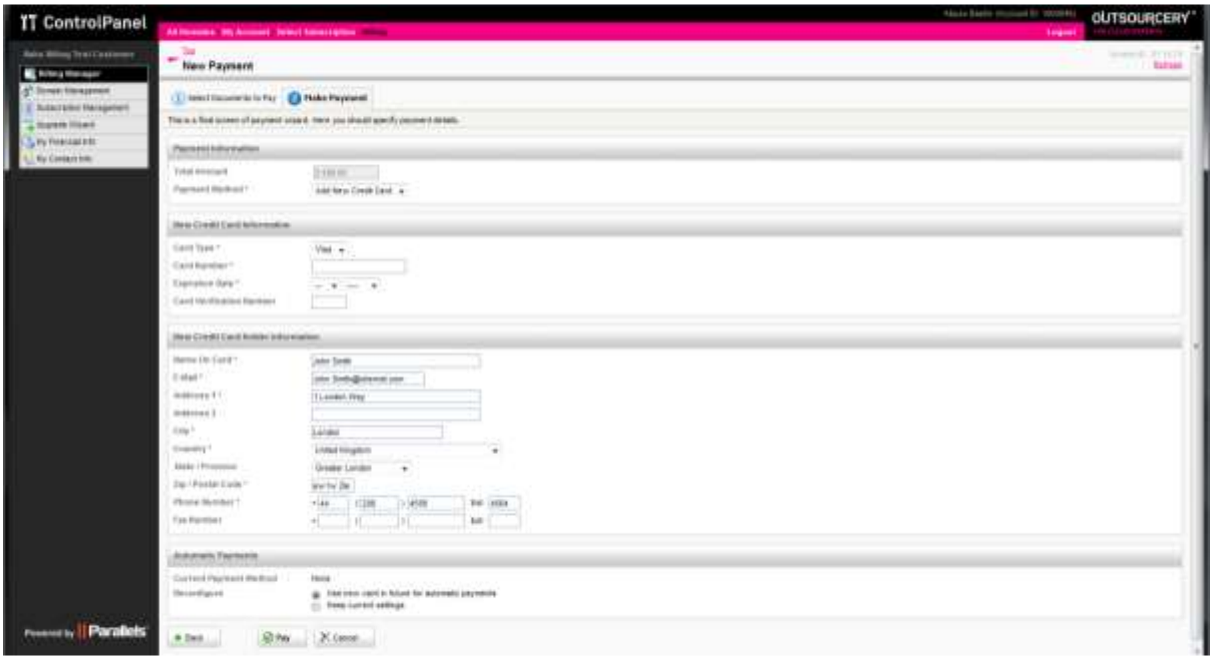


1. You can see the **Unpaid** amount under the **My Status** section. Next to this amount owed (**£2.500.00**) is a **Pay Now** button which you need to click in order to start the payment process. You can also carry out the following actions by clicking on the actual amount or by clicking on the **New Payment** link
2. You will see the following screen

1. You will be on the **Select Documents to Pay** section
2. The invoices and the number of open orders that have yet to be paid will be displayed

3. Click a checkbox next the **Document Number** of the order that you wish to make a payment on
4. Click **Next**

1. You will be on the **Make Payment** section and the **Total Amount** will be displayed
2. Select **Add New Credit Card** for the **Payment Method**

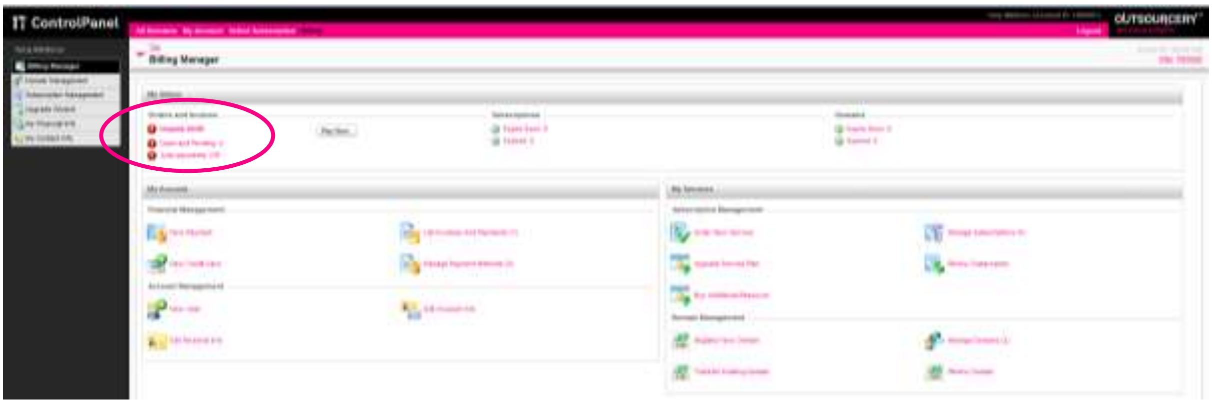


1. You must enter your card details on this screen
2. You must select one of the two options available under **Automatic Payments.** If **Keep current settings** is selected then this card will not be saved for use on future payments and the details must be entered again. If **Use new card in future for automatic payments** is selected then the card details will be saved securely and you will be allowed to choose this card the next time a payment is to be made
3. Click **Pay**
4. The payment will now be processed

PAY FOR A SERVICE FROM AN EXISTING PAYMENT

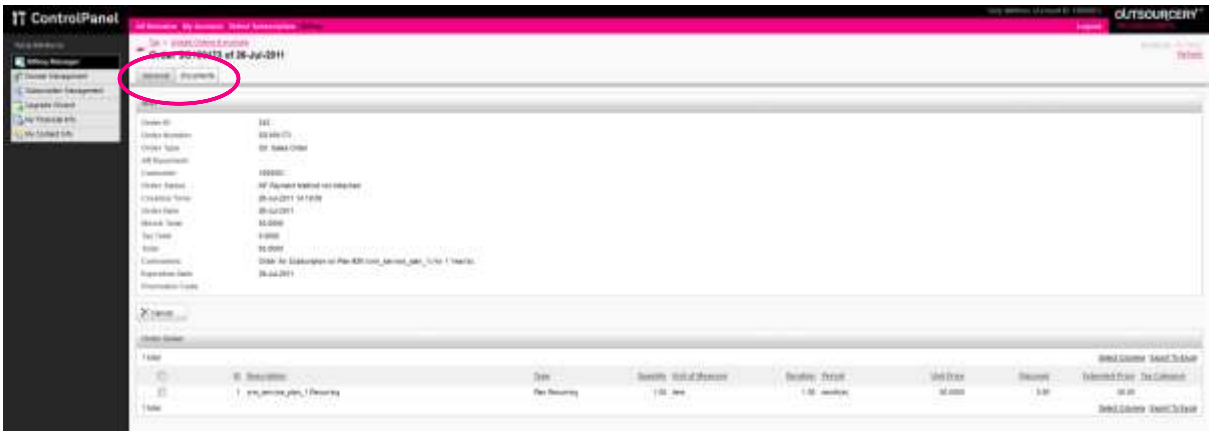
If your account is in credit and you would like to pay from this outstanding amount then you can perform the following actions.

1. Login or ensure you are logged into the Control Panel
2. Click **Billing** if you are not already on this screen
3. You will see the following screen



1. You now need to click on the **Unpaid: 50.00** link
2. You will now see the following screen

1. There will be a list of unpaid orders and invoices on this screen
2. Click the **Document Number** of the relevant order to open up the details screen



1. This screen displays the order details
2. Click **Documents**

1. Click **Attach Existing Payments**

1. Select the checkbox next to the payment which is to be used for this order
2. Click **Attach**

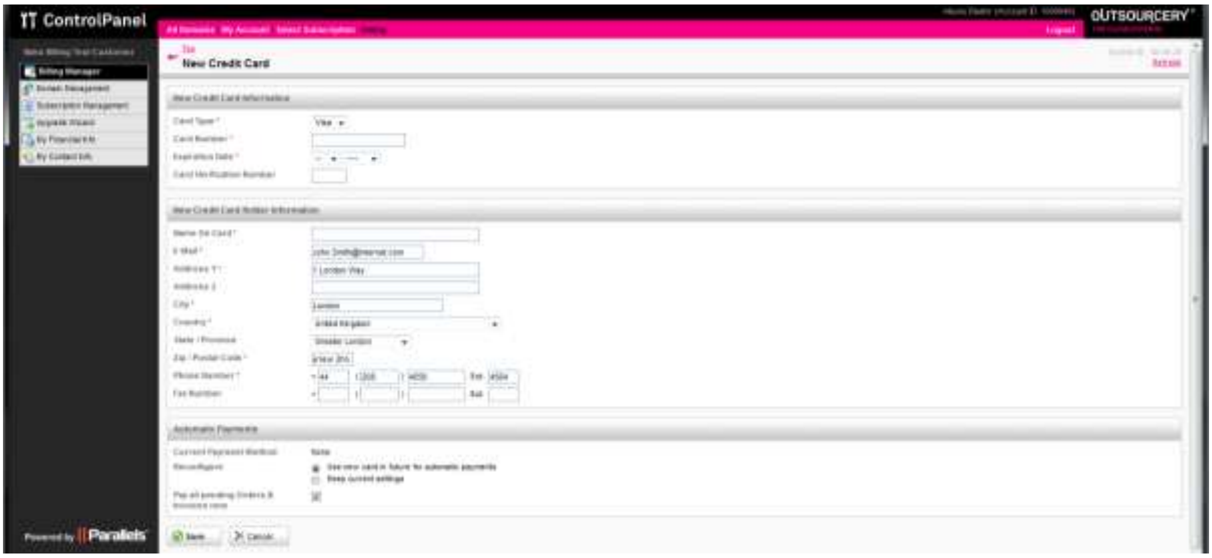
1. A confirmation message will appear confirming the document has been attached .This essentially means that the order is now attached to the balance on the account and hence has been paid or partially paid
2. Click on **Billing**

1. The **Unpaid** balance is now **0.00** but it was initially **50.00**

ADD NEW CREDIT/DEBIT CARD

If you would like to add a credit/debit card to your account so that you can select the card the next time you would like to make a payment rather than enter all the card details in manually then please perform the following:

1. Login to the CCP or ensure you are logged in already
2. Click on **Billing**
3. Select the **New Credit Card** link or you can click on **Manage Payment Methods** and click **Add New Credit Card**
4. You will see the following screen

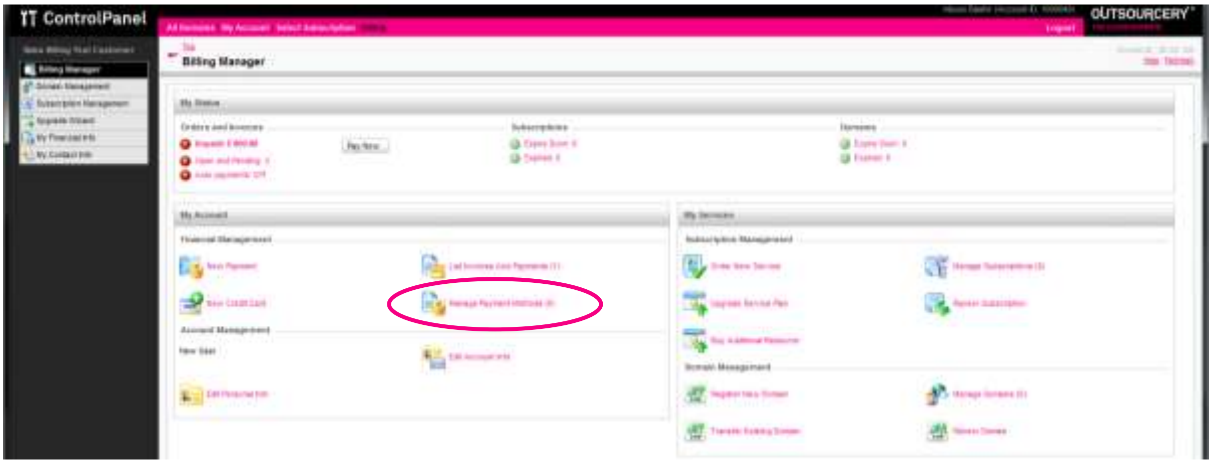


1. Populate the required fields
2. On the **Reconfigure** field you can select **Use new card in future for automatic payments** which will ensure that payments are taken automatically from this card when required. You can select **Keep current settings** if you just want to save the card details for future use and keep all other settings as they currently are.
3. Select the checkbox next to the **Pay all pending Orders & Invoices now** if you want this card to be used immediately to pay off all pending payments
4. Click **Save**
5. The details will be saved

ADD NEW BANK ACCOUNT

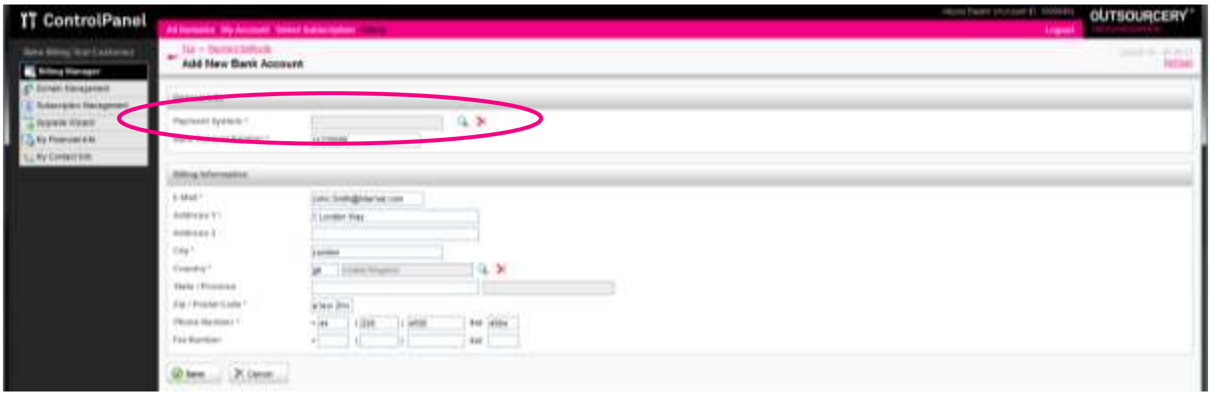
If you would like to add a bank account so that payments can be taken directly from your account rather than manually then please perform the following actions.

1. Login to the CCP or ensure you are logged in already
2. Click on **Billing**

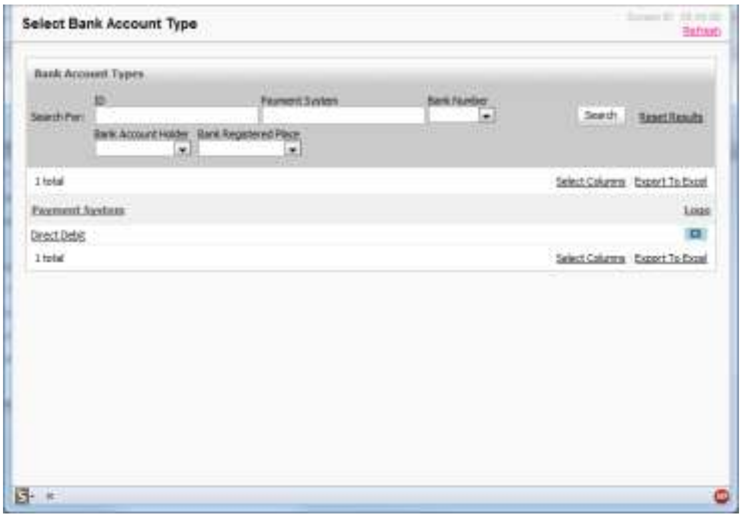


3. Click on the **Manage Payment Methods** link
4. You will see the following screen

1. Click on the **Add New Bank Account** link



1. Select a **Payment System**

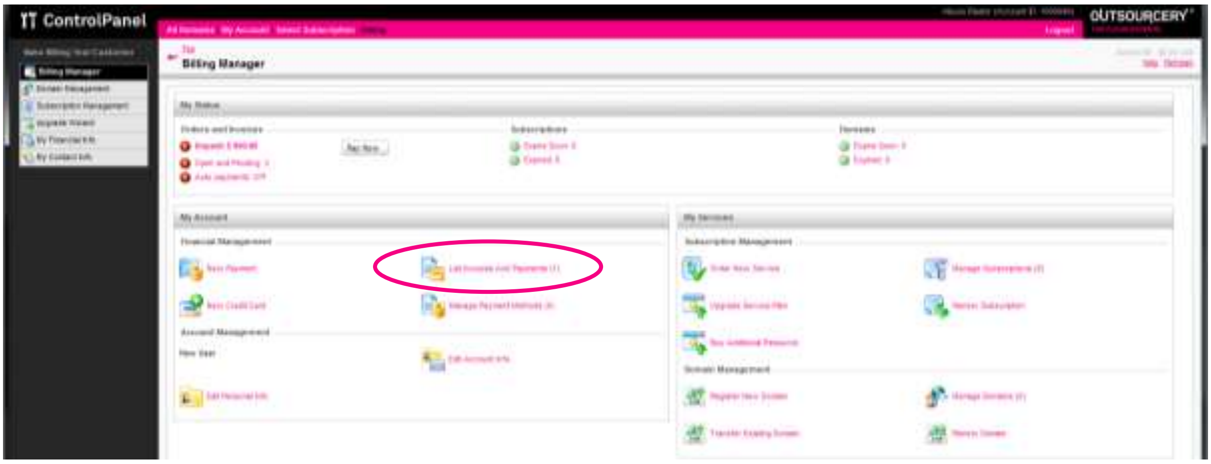


1. Populate the remaining fields
2. Click **Save**
3. The account details will have been saved successfully

VIEW INVOICES & PAYMENTS

If you would like to view all the current invoices received so far as well as all payments then please carry out the following actions.

1. Login to the CCP or ensure you are logged in already
2. Click on **Billing**
3. You should see the following screen



1. Click on **List Invoices and Payments**
2. You should see the follow screen

1. All invoices and payments will be displayed here

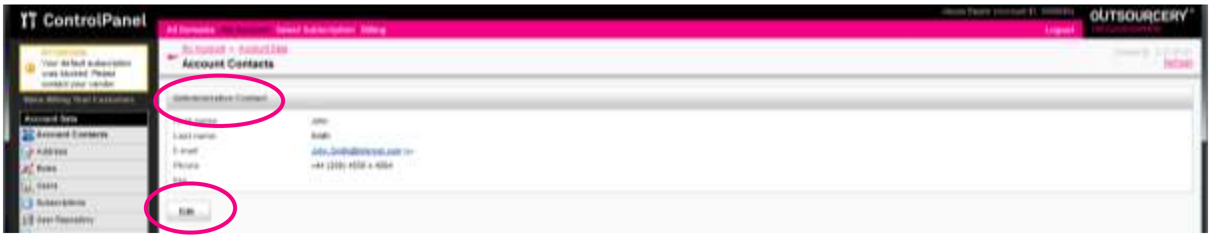
MY ACCOUNT

EDIT ACCOUNT CONTACTS

If you would like to edit account contact information such as changing the details of the administrative contact held on the account then please perform the following actions

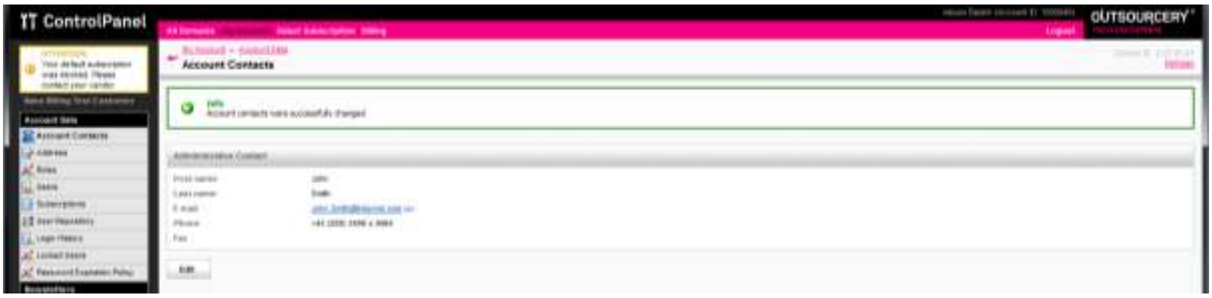
1. Login to the CCP or ensure you are logged in already
2. Click on **My Account** and you shall be viewing the following screen

1. Click on **Account Contacts**



1. The **Administrative Contact** should be displayed
2. Click **Edit**
3. You will see the following screen

1. Populate the required fields
2. If you would like the **Billing Contact** and the **Technical Contact** details to be the same as the Administrative Contact then please keep the checkboxes ticked. If not, remove the ticks and populate the required fields
3. Click **Submit**

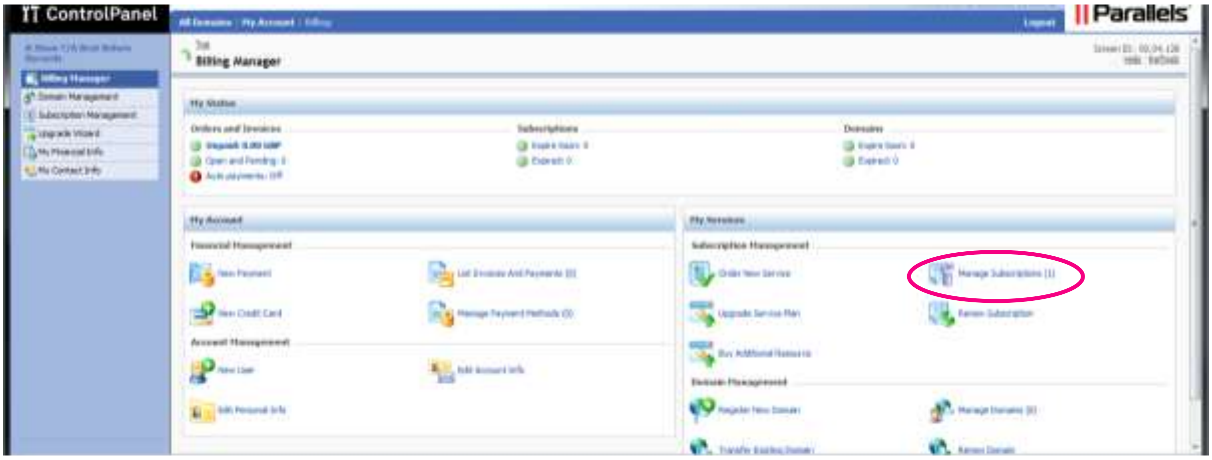


1. The changes will be saved successfully

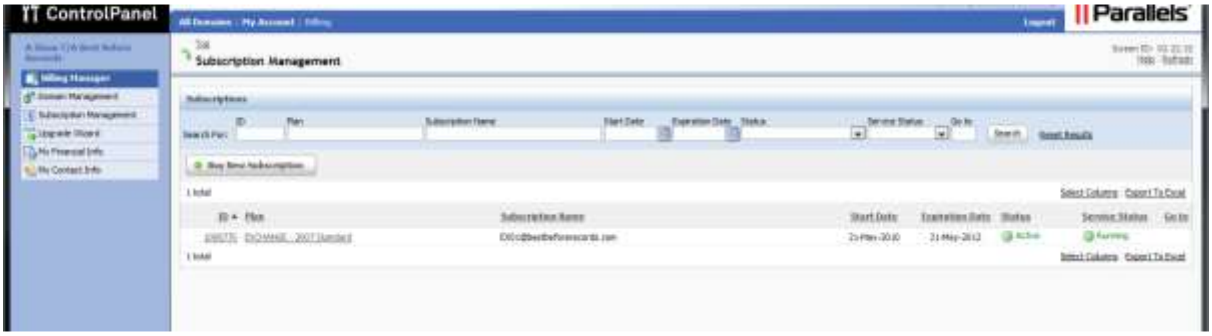
VIEW SUBSCRIPTIONS

If you would like to view your list of subscriptions, their details and all resources that are linked to each subscription then please perform the following actions.

1. Login to the CCP or ensure you are logged in already
2. Click on **Billing** and you shall be viewing the following screen



1. Click the **Manage Subscriptions** link
2. The following screen will be displayed



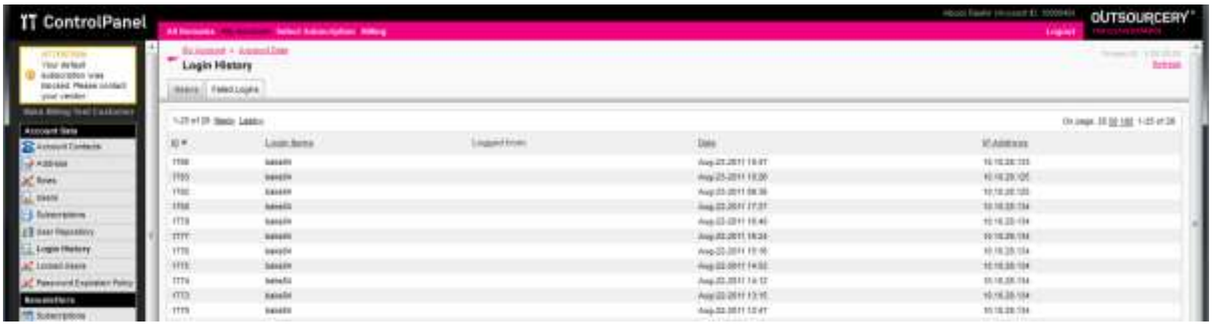
1. A list of all the services that you are subscribed to will be displayed

LOGIN HISTORY

If you would like to view the history of all login attempts to this account then the action need to be performed.

1. Login to the CCP or ensure you are logged in already
2. Click on **My Account** and you shall be viewing the following screen

1. Click the **Login History** link



1. A list of login attempts will be listed here. As you can see the date of login and the IP address used is also listed
2. You can click the **Failed Logins** tab to display a list of users who have unsuccessfully attempted to login. This is displayed in the following image

PASSWORD EXPIRATION POLICY

Password expiration policy can be set for the account through here. To set a policy please perform the following.

1. Login to the CCP or ensure you are logged in already
2. Click on **My Account** and you shall be viewing the following screen

2. Click the **Password Expiration Policy** link

1. You can click **Reset to defaults** to change the settings back to default
2. Click **Edit**

1. If you want to enable the expiration of passwords then please select the checkbox next to **Enable password Expiration**
2. Populate the **Expiration period** field

3. Select the checkbox next to the **Policy locked** field if you want this policy to be secure so that no other users can modify it
4. Click **Submit**

1. The changes will be saved

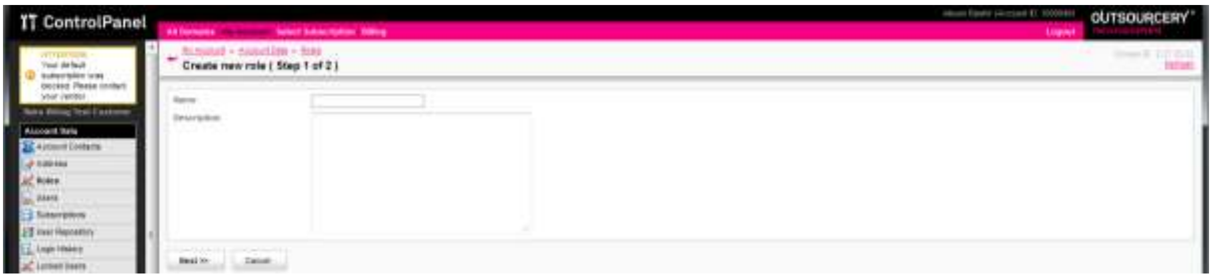
CREATE ADDITIONAL ROLES

Roles can be created through the control panel that allow you add and remove different privileges, these privileges can enable and restrict access to different features available in the control panel, restrict access to payments for example. Please carry out the following actions to create a role.

1. Login to the CCP or ensure you are logged in already
2. Click on **My Account** and you shall be viewing the following screen

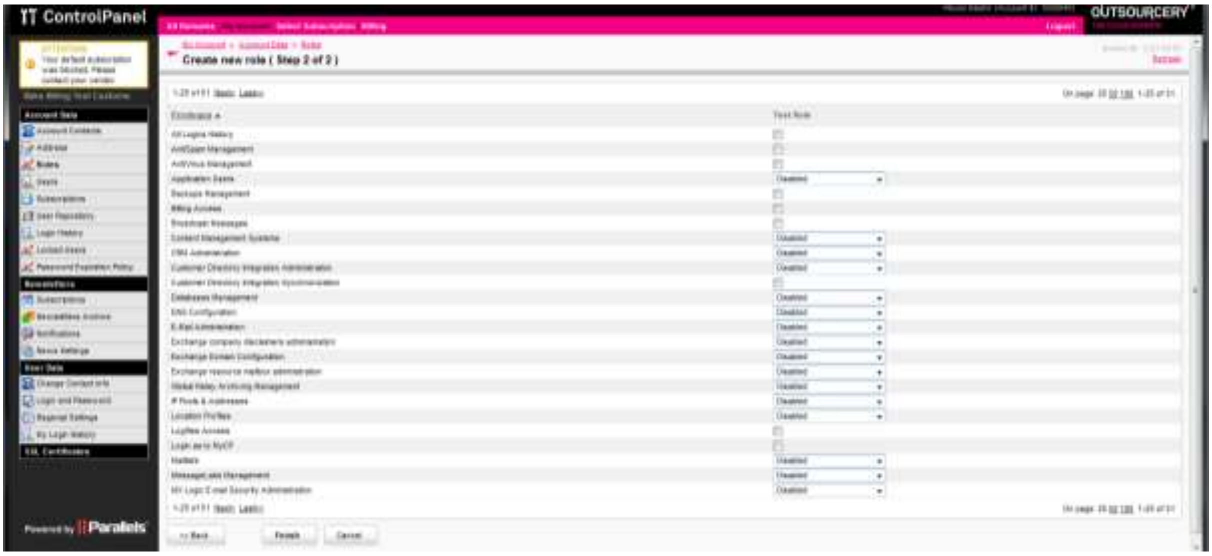
1. Click the **Roles** link

1. Some roles will already be displayed
2. Click the **Add New Role** button to start the process of creating a new role



1. Populate the **Name** field with the name of the new role
2. Populate the **Description** field with a description of the role
3. Click **Next**

4. You will see the following screen



1. Select the required privileges
2. Click **Finish**
3. The following screen should appear

1. The role will have been created successfully

LOCKED USERS

If a staff member on your account has managed to lock themselves out of the system via multiple failed login attempts then you can carry out the following to effectively unlock the user and login.

1. Login to the CCP or ensure you are logged in already
2. Click on **My Account** and you shall be viewing the following screen

1. Click the **Locked Users** link
2. A list of locked users will be displayed
3. Select a checkbox next to the users you would like to unlock and press **Unlock**
4. The relevant users will now be unlocked

EDIT USER DETAILS

To edit specific users details then please carry out the following steps.

1. Login or ensure you are already logged in
2. Click on **Billing**
3. Click on **My Account** and you shall be viewing the following screen

1. Click the **Users** link

1. Click the **Login Name** of the user you would like to edit
2. The following screen will show

1. Clicking **Edit** on each one of the different tabs here allows you to change the different details that are held against this user. For example, the **Contacts** tab allows you to edit the customers address details and the **Password Expiration** tab allows you to set a specific password expiration policy against this user
2. Click **Submit** if any changes are made