

CTOP v1.6 Update Summary – Account Administration April 14th, 2015 - Release

This CTOP update is focused on the Self-Distribution Administration enablement. As you will see below, CTOP is evolving to various market demands including capabilities and features. As part of the commitment to CTOP, we recognise that it is important for our Distribution Partners and it's users to have ability to customize settings while enabling self-enrolment self-administrative capabilities.

V1.6 Update Summary;

1. Distributor Self-Registration
 - a. New Distributor registration page / Link
 - b. Distribution Self Administration
 - i. Enabled additional email domains
 - ii. Enabled additional service regions (Multiple Country Association)
 - iii. Enabled ability to Edit SOW exhibit statements
 - iv. Enabled Installation fees for Solutions and Server platforms
 - v. Enabled Local Currency
 - vi. Enabled to set Solutions as Active/Inactive
 - vii. Enabled Sub-Contractors
2. Fixes
 - a. Fixed the ability to properly add new Distributors to partner profiles
 - b. Additional performance improvements

**For any/all requirements in support of CTOP, please send your requests to:
Support@CompletelyManaged.com**

Distribution Partner Self-Enrolment -

<https://www.configtoorder.com/NewDistributor.aspx>

Previous to CTOP release v1.6, new Distributors would manually provide Company information, User information, Email Notification addresses and Statement Of Work Exhibits, in a manual form. The CTOP Development team would manually convert this information to CTOP expected output. The team would then work with the Distribution partner to activate their Portal.

Within v1.6, New Distribution Partners are able to use the below New Distributor Link and follow the initial registration process. Once registered, the Distribution Admin user will be directed to the "Account Settings" Tabs (as documented below), with the new ability to complete this information in real-time and directly within the CTOP Portal.

<https://www.configtoorder.com/NewDistributor.aspx>

The screenshot shows a web browser window with the URL <https://www.configtoorder.com/NewDistributor.aspx>. The page has a blue header with navigation links: Product & Services, Support, How to Buy, Training & Events, and Partners. On the right, there are links for Log In, Register, and Welcome, Guest. The main content area is titled "Sign Up for Distributor Account" and contains a registration form with the following fields:

- First Name:
- Last Name:
- E-mail:
- Password:
- Confirm Password:
- Security Question:
- Answer:
- Phone:
- Extension:

Below the form, there is a red warning message: ***** DO NOT use your Cisco CCO Password *****. At the bottom, there is a checkbox and the text: I acknowledge that I am the administrator for this account.

User Account

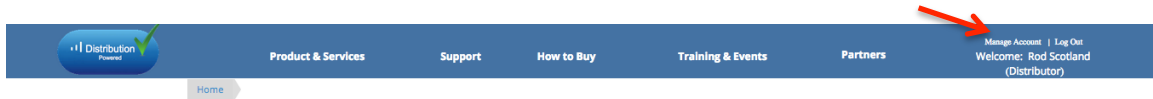
After making all the changes, please click on the Save button to save the changes.

The screenshot shows the "My User Details" tab selected in a navigation bar. The tab contains the following fields:

- First Name:
- Last Name:
- Phone:
- Extension:
- Email:
- Old Password:
- New Password:
- Confirm New Password:

At the bottom right, there are two buttons: "Save" (in a blue box) and "Cancel" (in a grey box).

New and existing Distribution partners, once logged in to CTOP, under the Account Management link on the far top right, you should notice several new tabs. These tabs enable you to do the following;



Tab 1 – My User Details

The My User Details Tab enables the user to add or change basic information about their profile including First and Last Name, Contact details. This tab also enables the ability to change the user password for the account.

User Account

After making all the changes, please click on the Save button to save the changes.

A screenshot of the 'My User Details' tab in the CTOP system. The tab is highlighted in blue. Below the tab, there is a form with several input fields. The 'First Name' field contains 'Rod'. The 'Last Name' field contains 'Scotland'. The 'Phone' field contains '416-410-1763'. The 'Email' field contains 'Rod@Scotland.ca'. The 'Old Password' field contains 'Old Password is required.'. The 'New Password' field contains 'Password is required.'. The 'Confirm New Password' field contains 'Confirm Password is required.'. A red arrow points to the 'My Sub-Contractors' tab. At the bottom right, there are 'Save' and 'Cancel' buttons.

Tab 2 – My Company Details

The My Company Details Tab enables the user to add or change company specific information such as the Company Name, Address and Country detail. Additionally, this Tab is where the Company Admin user can upload the Companies Logo that is displayed within the Statement Of Work.

At the bottom of this Tab exists the ability to add the organizations valid Company Email Domains. This is a very important section to complete within CTOP as these listed domains are then used upon user registration. If a new registering user's email address domain matches any of the listed domains within this section, this user automatically becomes recognised as an employee of the company. This business rule enables a streamlined user registration that separates how Distribution employees are distinguished from Distribution Partner users. This business rule also assures that anyone using your domain within their email registration is seen and be validated as an employee.

The screenshot displays two main sections: 'Company Email Domain' and 'Service Region'. The 'Company Email Domain' section contains a table with columns for 'Domain' and 'Action'. It lists 'Scotland.ca', 'cisco.com', and 'ALL-OF-YOUR-VALID-DOMAINS-HERE.com', each with a 'Remove' button. Below the table is a text input field labeled 'New Domain' and an 'Add' button. The 'Service Region' section contains a table with columns for 'Country', 'Active', and 'Action'. It shows 'Canada' with 'Active' set to 'Yes' and an 'Add' button. Below the table is a dropdown menu labeled 'Select Country'.

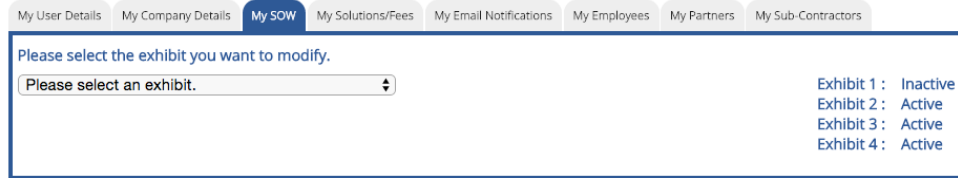
Company Email Domain:	
Domain	Action
Scotland.ca	
cisco.com	Remove
ALL-OF-YOUR-VALID-DOMAINS-HERE.com	Remove
<input type="text" value="New Domain"/>	Add

Service Region:		
Country	Active	Action
Canada	Yes	
<input type="text" value="Select Country"/>		Add

To the bottom right, you will see the option to set your active Service Regions. Within this section, you have the ability to enable your single CTOP Distribution Centre as an active drop down within multiple Cities and/or Countries. As an example, if ABC Distribution Centre is located in Canada however, has the requirement to also serve additional countries, simply by adding the required Country while setting active to "yes", enables new users register and enter their local country information, and due to ABC Distributor now actively serving this Region, ABC will appear within the Dropdown for the user to select.

Tab 3 – My SOW

The My SOW Tab enables the Admin within the Distribution partner to edit their own Statement Of Work Exhibits.



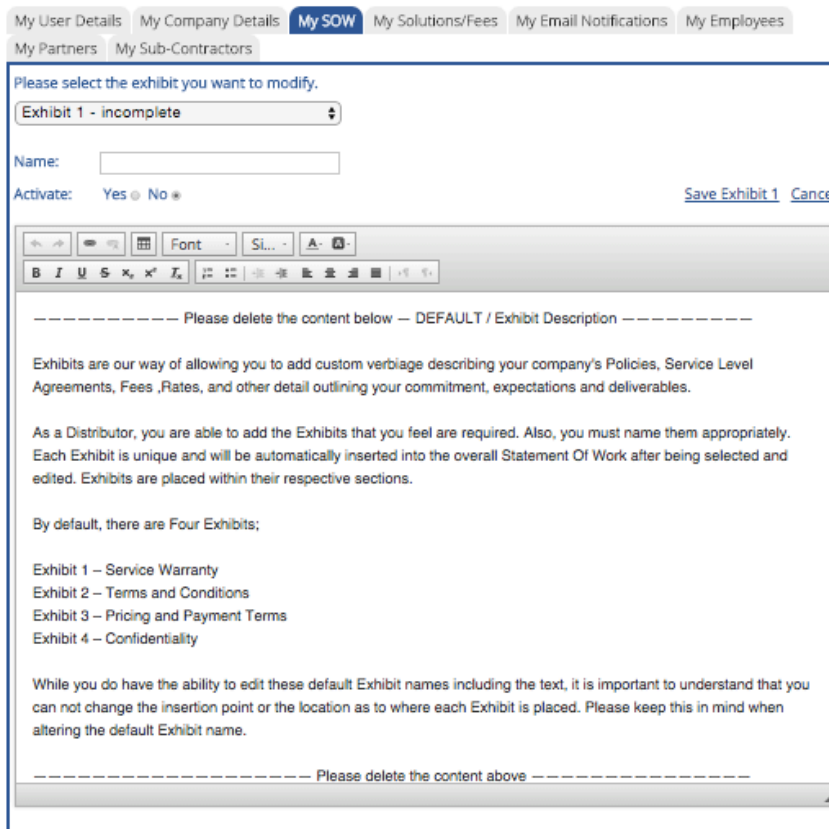
My User Details My Company Details **My SOW** My Solutions/Fees My Email Notifications My Employees My Partners My Sub-Contractors

Please select the exhibit you want to modify.

Please select an exhibit. ▾

Exhibit 1 : Inactive
Exhibit 2 : Active
Exhibit 3 : Active
Exhibit 4 : Active

On the initial screen, the user can see the “status” of the 4 available exhibits. The user can set each exhibit as: Inactive or Active. An Inactive exhibit will not be displayed within the final SOW document.



My User Details My Company Details **My SOW** My Solutions/Fees My Email Notifications My Employees
My Partners My Sub-Contractors

Please select the exhibit you want to modify.

Exhibit 1 - incomplete ▾

Name:

Activate: Yes No

[Save Exhibit 1](#) [Cancel](#)

----- Please delete the content below -- DEFAULT / Exhibit Description -----

Exhibits are our way of allowing you to add custom verbiage describing your company's Policies, Service Level Agreements, Fees ,Rates, and other detail outlining your commitment, expectations and deliverables.

As a Distributor, you are able to add the Exhibits that you feel are required. Also, you must name them appropriately. Each Exhibit is unique and will be automatically inserted into the overall Statement Of Work after being selected and edited. Exhibits are placed within their respective sections.

By default, there are Four Exhibits;

Exhibit 1 – Service Warranty
Exhibit 2 – Terms and Conditions
Exhibit 3 – Pricing and Payment Terms
Exhibit 4 – Confidentiality

While you do have the ability to edit these default Exhibit names including the text, it is important to understand that you can not change the insertion point or the location as to where each Exhibit is placed. Please keep this in mind when altering the default Exhibit name.

----- Please delete the content above -----

Editing an Exhibit is easy! The user is provided a Web word processing like interface with most all formatting features enabled.

It is important (and mandatory) to properly name your Exhibits. Note that these names are used within the SOW and represent the name of the “section” that is generated within your SOW. Pressing Save at the bottom of the Exhibit, saves the section and setting it Active, will enable it within the official SOW

Tab 6 – My Employees

The My Employees Tab enables the Admin user to manage the companies registered employees.

F. Name	L. Name	Email	Email Validated	Approved	Action
Anton	Krasnov	anton@qforia.net	Yes	Yes	Select Action
Mojan	Mobasser	mmobasse@cisco.com	Yes	Yes	Select Action
Ian	Gallagher	igallagh@cisco.com	Yes	Yes	Select Action
Francois	Leclair	fleclair@cisco.com	Yes	Yes	Select Action
Bonnie	Di Adamo	bdiadamo@cisco.com	Yes	Yes	Select Action
Paramjeet	Rakhra	prakhra@cisco.com	Yes	Yes	Select Action

Within the “Actions” dropdown, the user can select certain options with respect to the current “state” of the user. The actions drop down options are dynamic and only associated to that particular user. Please pay special attention to the current states of the employee registration status. The two red arrows above represent the fields that clearly outline these states. The Email validated state, outlines that the user has email validated their account. This is important and is the first step that is required for each user to be approved. Self email validation is a security measure that validates that the user is a real user and with a valid email address that they have access to in order to receive communications. The Approved state is equally important. The status of this represents if the Distribution admin has validated the account for use within the portal. It is not uncommon to see that a user has either not validated the email account or has however, the admin had yet to approve them for CTOP use within their portal. The Actions drop down allow the Admin to dynamically set options for the user. Email Notification Reminders, Deactivate/Delete and other user administrative capabilities.

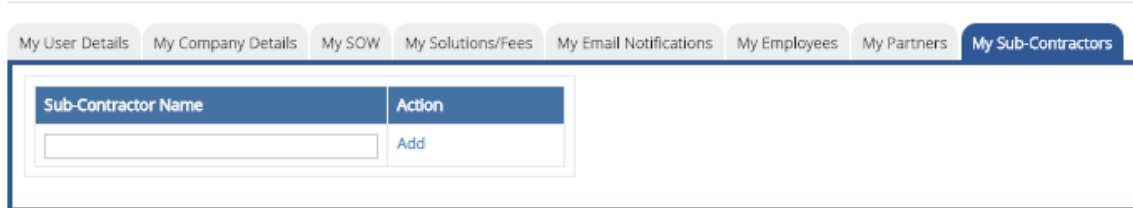
Tab 7 – My Partners

The My Partners tab is very similar to the My Employees tab. The same principals apply with each of these Tabs however, the Partners Tab does require unique validation to enable the requesting partner the ability to complete the partner side of the CTOP configuration. Once again, pay special care to the Status fields for each user.

F. Name	L. Name	Email	Email Validated	Approved	Reseller Name	Action
Rod	Scotland	rscotland@cisco.com	Yes	Yes	Tech Data	Select Action
Anton	Krasnov	anton@qforia.net	Yes	Yes	Demo Distributor (Cisco Employee)	Select Action
Mojan	Mobasser	mmobasse@cisco.com	Yes	Yes	Demo Distributor (Cisco Employee)	Select Action
Ian	Gallagher	igallagh@cisco.com	Yes	Yes	Demo Distributor (Cisco Employee)	Select Action

Tab 8 – My Sub Contractors

The My Sub Contractors Tab enables the Distribution partner the ability to have sub-contractor partners perform the work of the actual delivery to the CTOP order, or perhaps can be used to simply track where the order originated. An example of this could be that ABD Distributor has a sub-distribution partner that would like to have their partners register to the portal, however select ABC's sub-contractor as their Distribution partner but have the actual CTOP order executed from ABC Distribution. Later this can be reported or used to segment order information as required.



The screenshot shows a navigation bar with several tabs: 'My User Details', 'My Company Details', 'My SOW', 'My Solutions/Fees', 'My Email Notifications', 'My Employees', 'My Partners', and 'My Sub-Contractors'. The 'My Sub-Contractors' tab is selected and highlighted in blue. Below the navigation bar is a table with two columns: 'Sub-Contractor Name' and 'Action'. The 'Sub-Contractor Name' column contains a text input field. The 'Action' column contains an 'Add' button.

Sub-Contractor Name	Action
<input type="text"/>	Add

If sub-contractor is keyed in and made active, partner users will see this option in the dropdown with all new CTOP orders upon the new order creation process.

Regards,

Your CTOP Development and Support Team