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

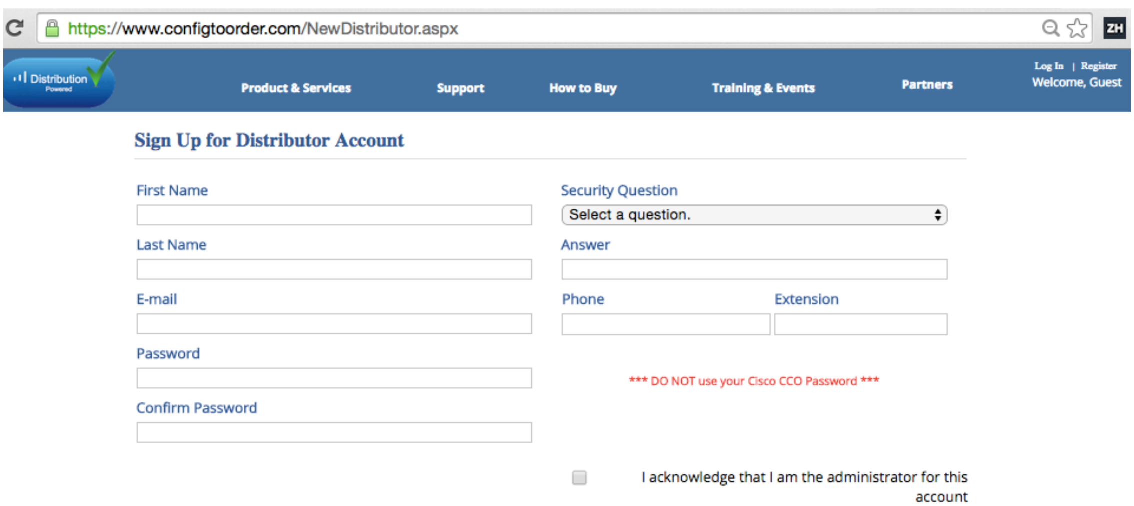
For any/all requirements in support of CTOP, please send your requests to: Support@CompletelyManaged.com

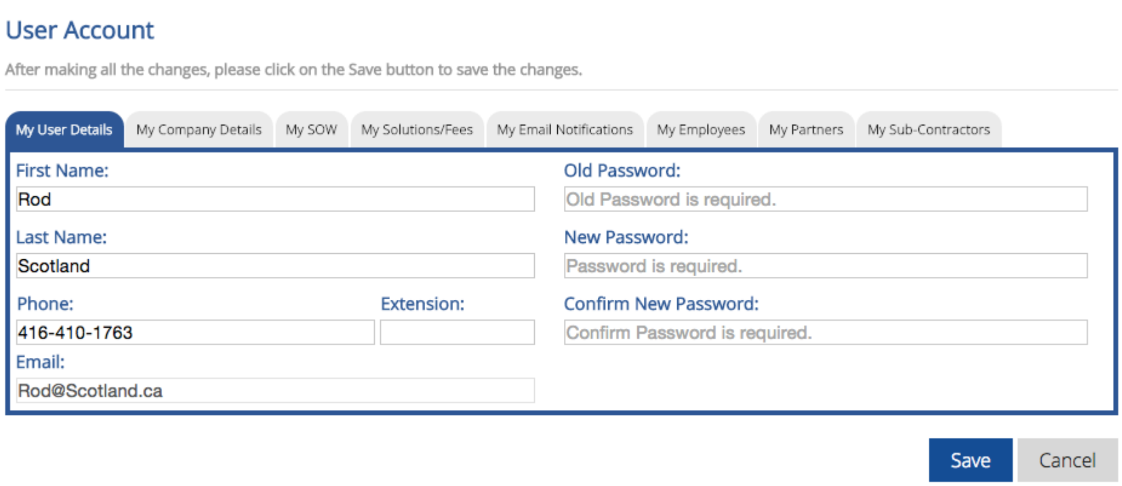
Distribution Partner Self-Enrolment - https://www.configtoorder.com/NewDistributor.aspx

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.

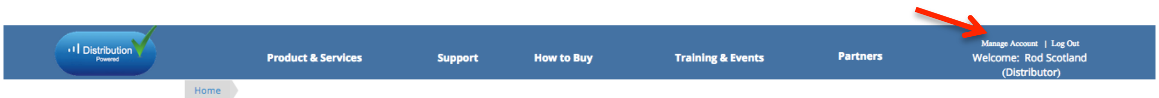
Within v1.6, New Distribution Partners are able to use the below New Distributor Link and follow the initial registration process. Once registered, the Distribution Admin user will be directed to the “Account Settings” Tabs (as documented below), with the new ability to complete this information in real-time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

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



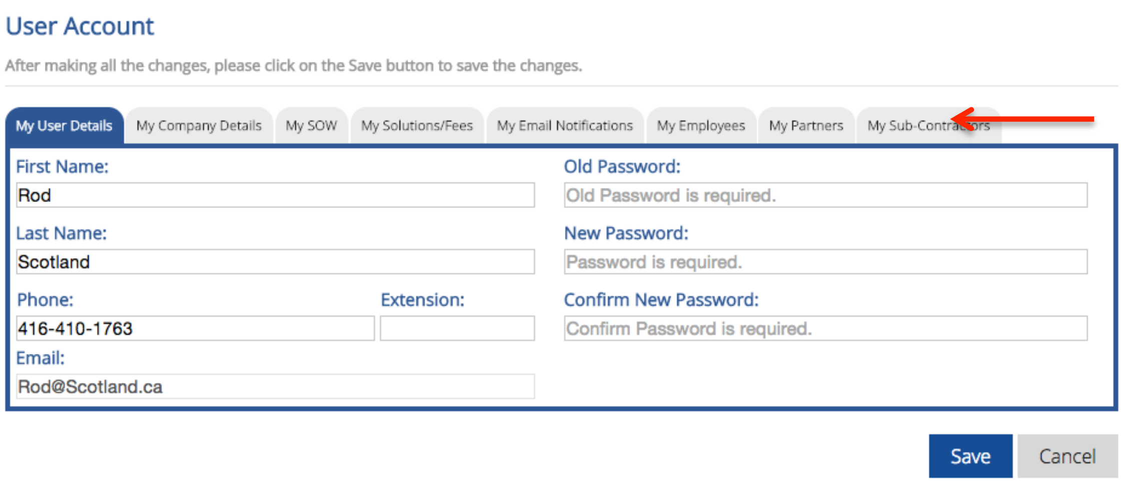


New and existing Distribution partners, once logged in to CTOP, under the Account Management link on the far top right, you should notice several new tabs. These tabs enable you to do the following;



Tab 1 – My User Details

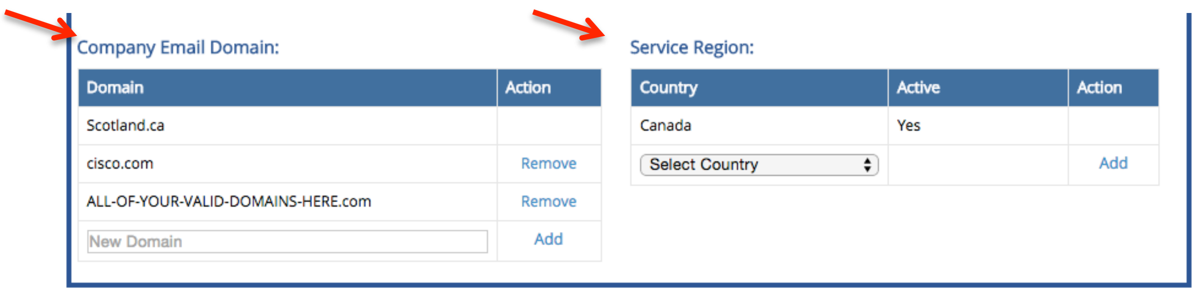
The My User Details Tab enables the user to add or change basic information about their profile including First and Last Name, Contact details. This tab also enables the ability to change the user password for the account.



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.

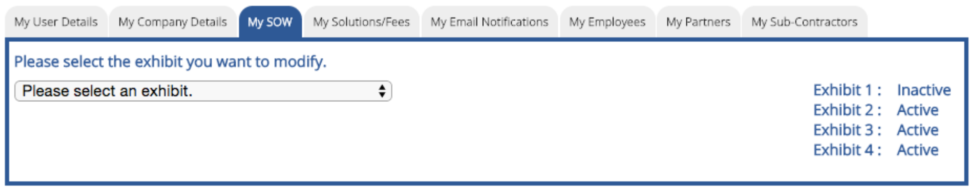
At the bottom of this Tab exists the ability to add the organizations valid Company Email Domains. This is a very important section to complete within CTOP as these listed domains are then used upon user registration. If a new registering user's email address domain matches any of the listed domains 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.



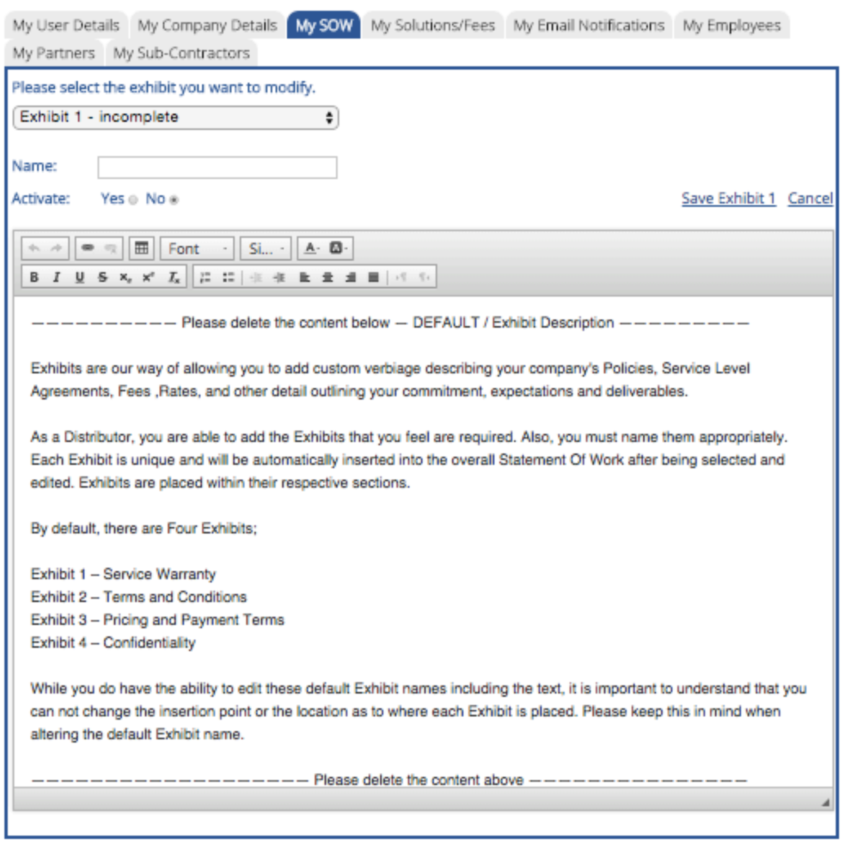
To the bottom right, you will see the option to set your active Service Regions. Within this section, you have the ability to enable your single CTOP Distribution Centre as an active drop down within multiple Cities and/or Countries. As an example, if ABC Distribution Centre is located in Canada however, 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.



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.

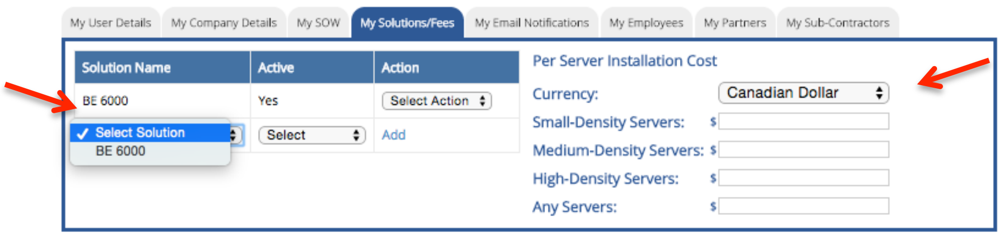


Editing an Exhibit is easy! The user is provided a Web word processing like interface with most all formatting features enabled.

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 4 – My Solutions/Fees

The My Solutions / Fees Tab enables the Distribution partner to enable (Activate) various solutions that exist within their CTOP offer.

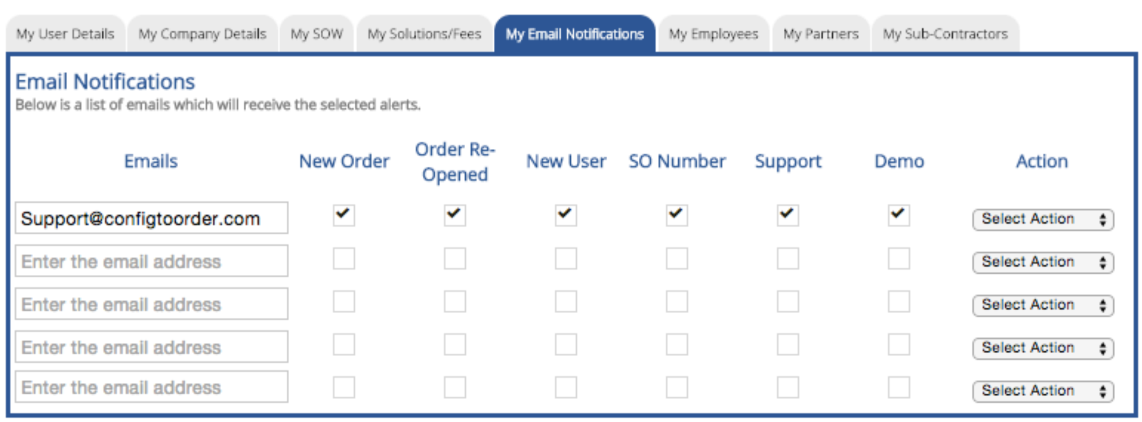


As CTOP progresses to include other Cisco Communications offerings, including the Business Edition 6000, 6000S and forward, these solutions will allow the Admin user to “Activate” the offer and equally, set their local Currency and Rate<s> associated to each offer, Server type and blanket Fee<s> accordingly.

If the Distributor is not prepared to provide a service to the particular offer, simply not making it “Active” is all that is required for that offer to not be available to partners. When ready, simply activate the offer on demand.

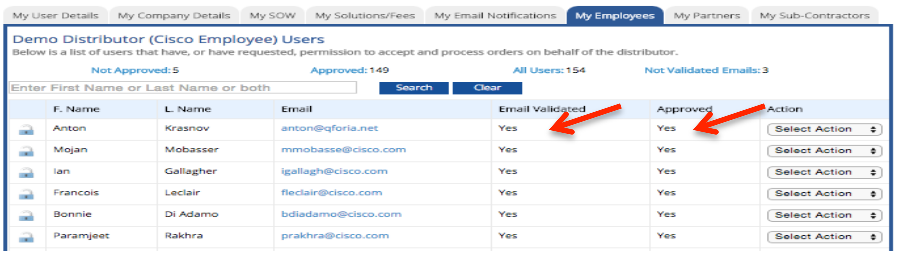
Tab 5 – My Email Notifications

The My Email Notifications Tab enables the Admin to specify Notification contacts for each of the available Notification conditions as seen below. This is straight forward matrix detailing the email (or alias) address with the associated check box under the Notification. Traditionally, the Distribution partner will have created team Alias email addresses however, if a particular person or email address is all that is required, simply add this to the required notification condition.   Use the “”Action” drop down to test the email account for proper working notifications.



Tab 6 – My Employees

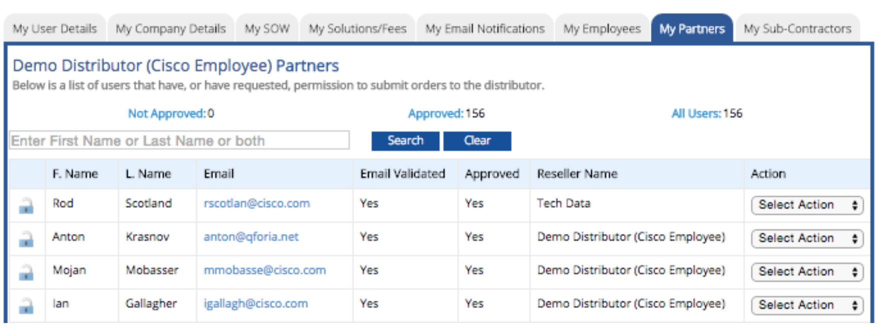
The My Employees Tab enables the Admin user to manage the companies registered employees.



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. If 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.

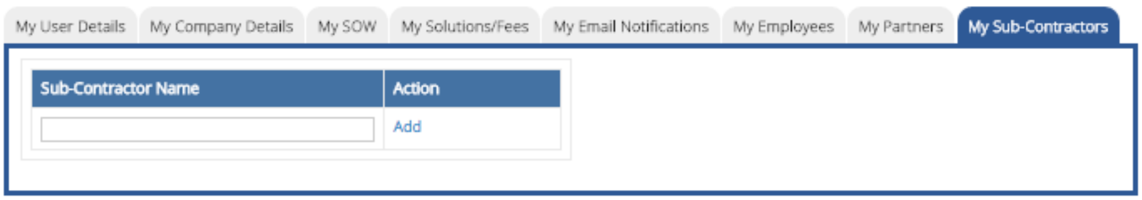
Tab 7 – My Partners

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.



Tab 8 – My Sub Contractors

The My Sub Contractors Tab enables the Distribution partner the ability to have sub-contactor 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.



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