Licensing Portal User Guide

Digital Okta Marketplace Member Panel

ITQAN Global for Cloud and Digital Computing Systems - Digital Okta LLC

P.O. Box 145581 | Abu Dhabi, U.A.E.

TELE : +971 (2) 6147032

Fax : +971 (2) 444 4598

Email: marketplace@digitalokta.ae

Website: https://hidubai.digitalokta.ae

Powered by

DIGITAL OKTA

Itqan global for cloud and digital computing systems

Gold Microsoft Partner

Microsoft

Table of Contents

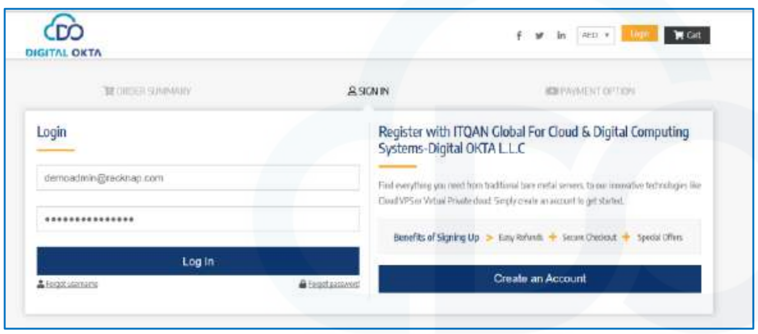
Overview

In this user guide, you will find detailed information on how to use our one-step self-service licensing portal. You will be able to buy new products, add and remove licenses and monitor Azure consumption.

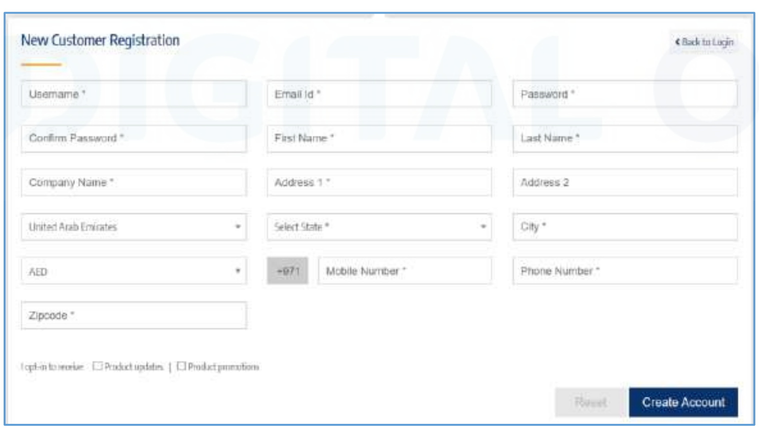
Registration Steps for New Customers

In the case of new customer below steps need to be followed:

- Go to Our Market Place URL: https://mp.digitalokta.ae/
- Click on Create an account



- Enter all the required information



Login Guidelines:

- The customer needs to enter the username and password provided to him during onboarding.
- There can be two or more user accounts with same email ID, but the username needs to be unique for each.
- In case of **forgot password** or **username**, you will be able to reset them through the login page.
- For **forgot username**, User needs to enter the registered email ID and account ID. User will receive the username on his mail.
- For **forgot password**, he needs to enter his registered username to be able to reset the password.

Overview of the Member Panel Dashboard

From your member panel dashboard, you get quick access to the most critical sections of your member panel:

https://managemp.digitalokta.ae/memberp/

My Dashboard: It is a customer control panel from where all information can be accessed and managed by the customer.

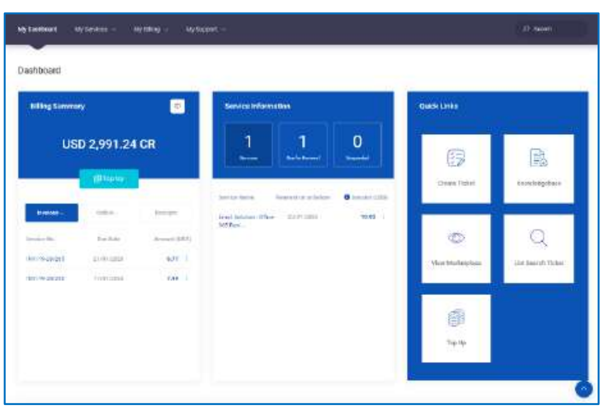
My Services section: From here, the customer can view and manage his services.

My Billing section: From here, the customer can manage details related to his billing, manage renewals, view invoices, orders, receipts, etc.

My Support section: From here, get access to different support options, submit a ticket, view mail communication and check announcements.

Profile section: From here, the customer can view and edit his personal information, set preferences, make sub-users and more.

Here' a screenshot of the home page:



My Services

Overview

Home >> My Services

The section contains information about all the services of a customer.

To access My services:

- Go to Home.

- Click on List/Search from the My Services menu.

A new page will open. Here, you can see the following:

Current Services

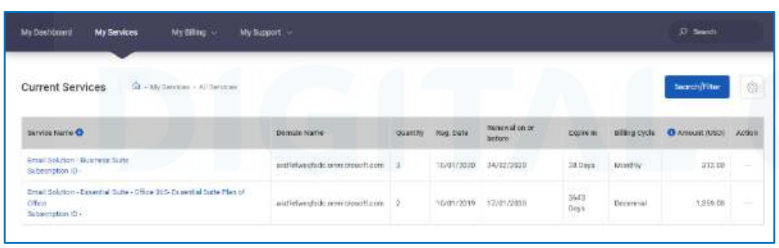
Home >> My Services >> All Services

This section will give an overview of all your current services.

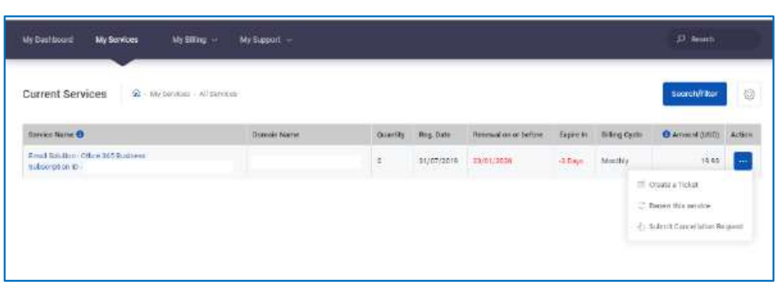
In this list, the information about each service is displayed in the below-given sequence.

Service Name – Domain Name (associated with the service) – Registration Date – Renewal on or before – Expire In - Billing Cycle – Amount – Action

See screenshot of the current services section:



On the right-hand side of these details, for every service, you can find an overflow menu icon that consists of a list of quick actions. You can do the following here:



You can do the following here:

- Create a Ticket
- Renew this service
- Submit Cancellation Request

View the complete details of a service

To view the complete details (including renewals, add-ons and management options) of a particular service, click on the service name from the Current Services' page.
This will open a new window with details of the service.

Service Details

In the Service Details tab, you get the complete details of that particular service including the billing details, passwords (if any) and Value Added Services.

The information is arranged in the following sequence: Service - Domain - Reg. Date - Due Date - Amount (INR) - Action

You will find three tabs under this section:

In the Service Details tab, you get the complete details of that particular service including the billing details, passwords (if any) and Value Added Services.

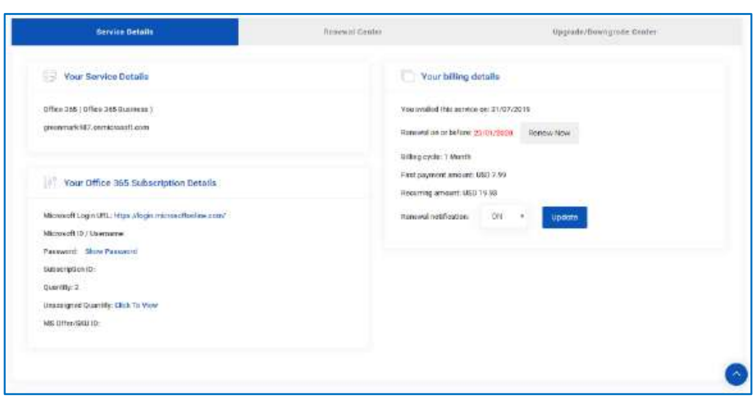
The information is arranged in the following sequence: Service - Domain - Reg. Date - Due Date - Amount (INR) – Action

You will find three tabs under this section:

- Service Details

  In the service details tab, you will get the complete details of that service including the billing details, subscription details etc.

  See screenshot:

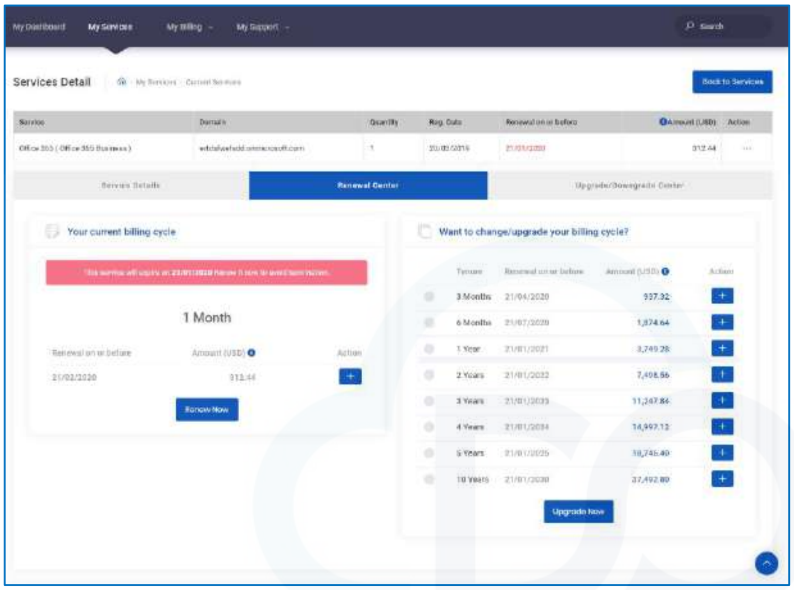


DIGITAL OKTA
ITQAN Global For Cloud & Digital Computing Systems L.L.C.

- Renewal Center

In the renewal center tab, you can view the renewal details of the service and renew the service as well. You can also upgrade the billing cycle of your service per the available billing cycles.

To renew a service:



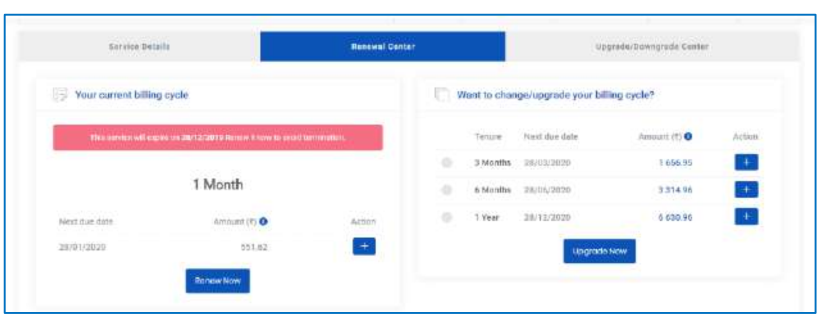
In the centre in the Renewal Centre tab, you can view the next due date and the amount to renew the service.

- Click on the Renew Now button to renew the service.

To Upgrade Billing Cycle:

On the right-hand side in the Renewal Centre tab, you can change or upgrade the billing cycle of your service based on the available billing cycles.

- Click on the No. of Months/Years you want to change or update your billing cycle to and Then click on the Upgrade Now button.



- Upgrade/Downgrade Centre

In the Upgrade Centre tab, you can upgrade/downgrade your plan/billing cycle and add more resources to your service.

The Upgrade Centre provides different options for different services. But, generally, you get the following two option:

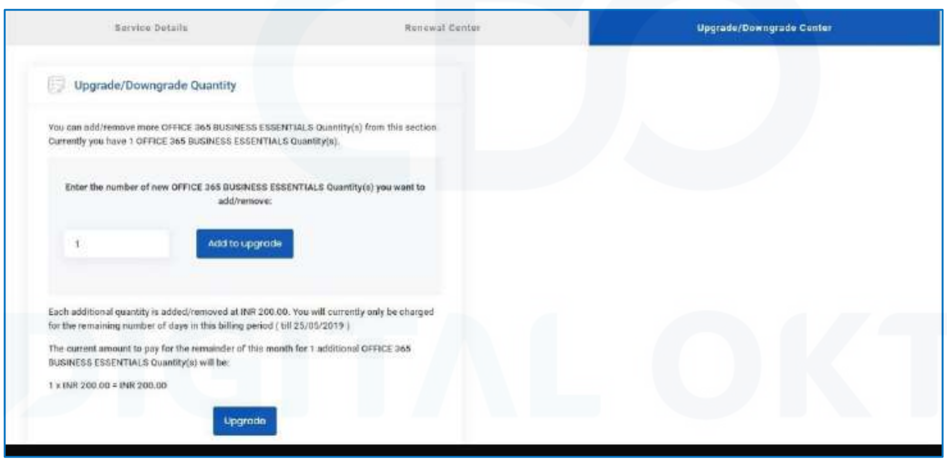
- **Upgrade/Downgrade Quantity**

In the Upgrade Quantity section, you can add more accounts to your service if the service is available based on quantity.

Enter the number of accounts that you want to add or remove.

On clicking on Add to Upgrade, Upgrade option will appear. As soon as the admin clicks on it, a new order is generated, once the order is paid then licenses (Number of quantities added) is updated and displayed in the service section of the client.

See sample screenshot of the Upgrade/Downgrade Centre section:



<u>Pro-rata billing</u>

Under Prorate billing, for any additional service license upgrade, the customer is billed taking in account the number of days remaining in his service billing cycle and the price per license.

Prorate Billing:

To calculate the per day price of any additional service license, the following method is followed:

Per day price of additional service license = Billing Cycle's Price / Billing cycle days

Then,

The price of additional service license = Number of days remaining in the billing cycle X Per Day Price of additional service license.

For example: For a service, **Billing cycle Price is 274 Rs per month**. (Billing cycle pricing can be checked in Plan pricing under Packages section in settings)

The number of days in the billing cycle is **30,** and the purchase date is **20/01/2019** to **19/02/2019**.

Per day price of additional service license = Billing Cycle's Price / Billing cycle days or,

274/30 (here)

Thus, **Per day price of additional service license = 9.13 Rs. (approx.)**

If the customer buys one more service license on 5/02/2019, the additional license will be billed as:

Remaining days in the billing cycle = 15 days

Per new service license price = Number of days remaining in the billing cycle X Per day price of additional service license i.e.

= 15 days X 9.13 Rs.

= 137 Rs.

Please note that same process will be used in case of service license downgrade.

*The information used in the example is for indicative purpose only. Actual calculations may vary depending upon the parameters used.

Set Upgrade/Downgrade permission for Sub-Contacts

In the Upgrade/Downgrade section, you can set permission for sub-contacts.

There are two scenarios to set permission for sub-contacts:

1. Service provider end customer
2. Partner end customer

Service provider end customer

Home >> Clients >> Customers >> Sub Contacts >> Add New Sub Contact

- Go to Sub Contacts (tab) page.
- Under Permissions list, there is Products/Services Actions checkbox.
- Check the Upgrade/Downgrade Quantity under Products/Services checkbox.
- If the Upgrade/Downgrade Quantity is checked, the tab will show in the customer panel.
- If the Upgrade/Downgrade Quantity is unchecked, the tab will not show in the customer panel.

- If sub contact user does not have billing permission in the Upgrade/Downgrade Quantity case, then the user will be allowed to place the order but not make the payment.
- If sub contact user has billing permission in the Upgrade/Downgrade Quantity case, then the user will be allowed to place the order as well as make the payment.

DIGITAL OKTA

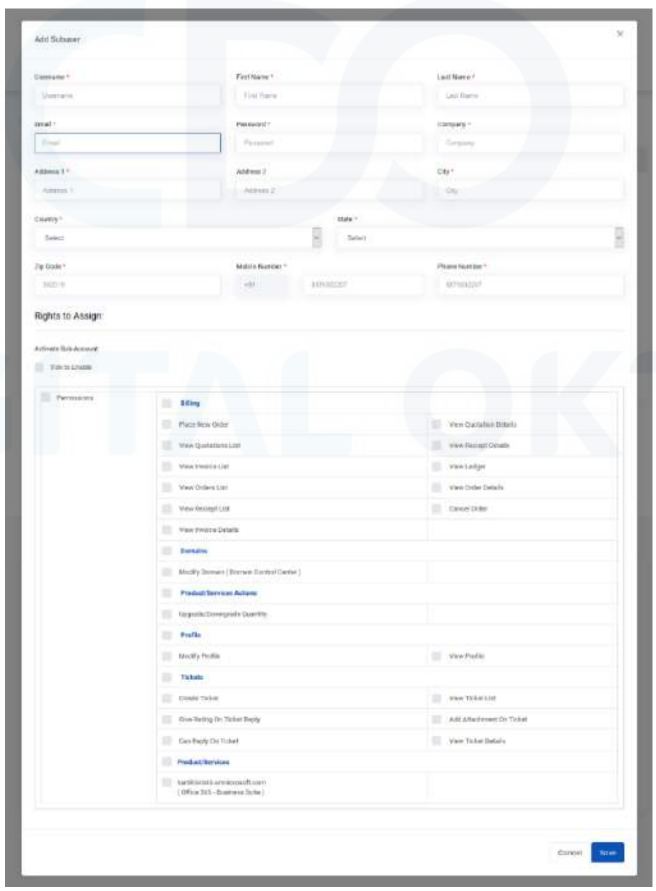
ITQAN Global For Cloud & Digital Computing Systems L.L.C.

Client Panel

Profile >> Subuser >> Add/Edit Sub User

- Go to Subuser(tab) page.
- Under Permissions list, there are Products/Services Actions checkbox.
- Check the Upgrade/Downgrade Quantity under Products/Services checkbox.
- If the Upgrade/Downgrade Quantity is checked, the tab will show in the customer panel.
- If the Upgrade/Downgrade Quantity is unchecked, the tab will not show in the customer panel.

- If sub-user does not have billing permission in the Upgrade/Downgrade Quantity case, then the user will be allowed to place the order but not make the payment.
- If sub-user has billing permission in the Upgrade/Downgrade Quantity case, then the user will be allowed to place the order as well as make the payment.



Partner end customer

Home >> Clients >> Customers >> Sub Contacts >> Add/Edit Sub Contact

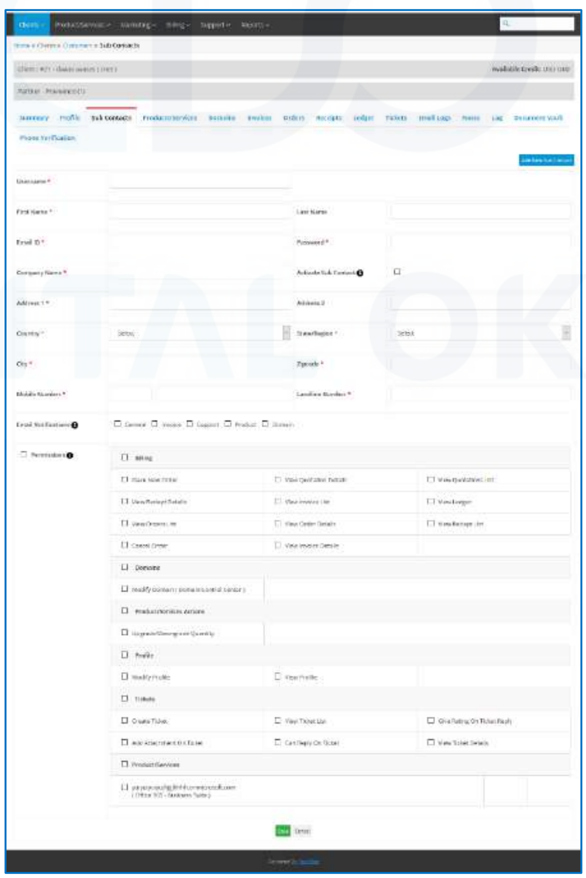
• Go to Sub Contacts (tab) page.

• Under Permissions list, there are Products/Services Actions checkbox.

• Check the Upgrade/Downgrade Quantity under Products/Services checkbox.

• If the Upgrade/Downgrade Quantity is checked, the tab will show in the customer panel.

- If the Upgrade/Downgrade Quantity is unchecked, the tab will not show in the customer panel.
- If the sub contact user does not have billing permission in the Upgrade/Downgrade Quantity case, then the user will be allowed to place the order but not make the payment.
- If sub contact user has billing permission in the Upgrade/Downgrade Quantity case, then the user will be allowed to place the order as well as make the payment.

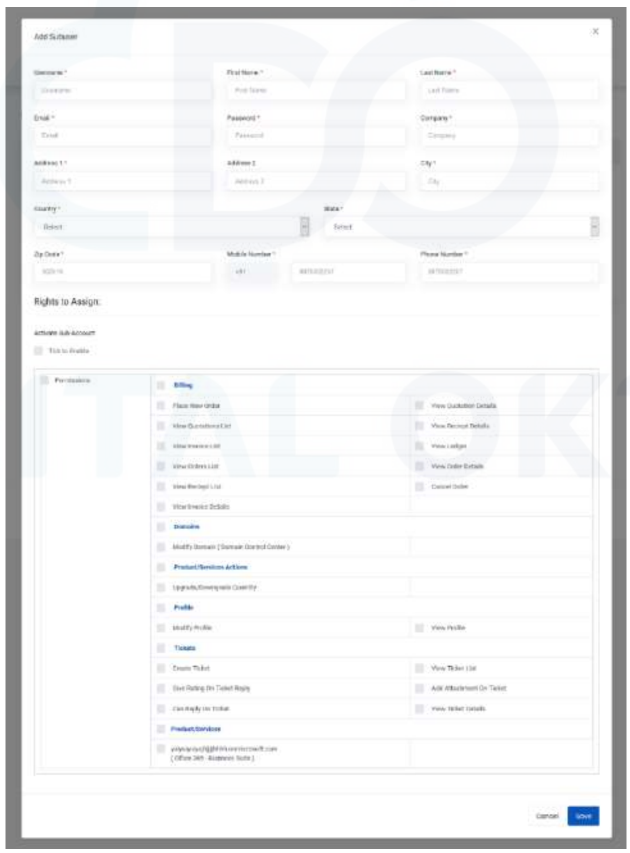


Client Panel

Profile >> Subuser >> Add/Edit Sub User

- Go to Subuser(tab) page.
- Under Permissions list, there are Products/Services Actions checkbox.
- Check the Upgrade/Downgrade Quantity under Products/Services checkbox.
- If the Upgrade/Downgrade Quantity is checked, the tab will show in the customer panel.
- If the Upgrade/Downgrade Quantity is unchecked, the tab will not show in the customer panel.

- If sub-user does not have billing permission in the Upgrade/Downgrade Quantity case, then the user will be allowed to place the order but not make the payment.
- If sub-user has billing permission in the Upgrade/Downgrade Quantity case, then the user will be allowed to place the order as well as make the payment.



Search/Filter Service

In the Service Details tab, you get the complete details of that particular service including the billing details, passwords (if any) and Value Added Services.

The customer can also filter his services based on several parameters.

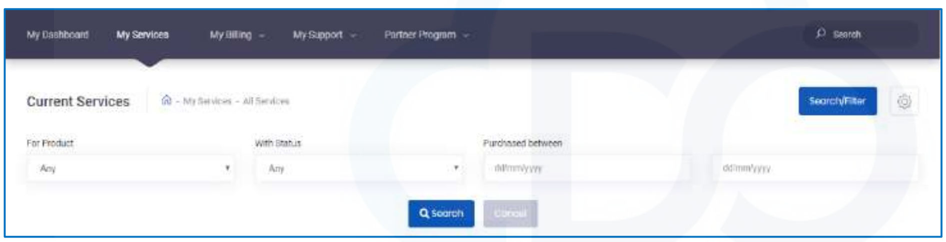
To search/filter services:

- Click on the Search/Filter button located in front of the current services.

- This will open a search form. You can filter based on Product, Status and Purchased date.

- After selecting the desired filter, click on the Search button.

See the sample screenshot of the search/filter section:



Adjacent to the search/filter button on the current services page, you will find a gear icon with different filters like - **All, Due for Renewal, Suspended, Terminated, Expired** and **Pending Delete Restorable** along with the number of count for each filter. You can filter the services directly from here too.

My Billing

• My Ledger - The Ledger section lists all the transactions that you have made. Here, you can view and export ledger.

• My Invoices - The Invoices section lists all your generated invoices. Here, you can view and download invoice details.

• My Orders - The Orders section lists all the orders that you have placed.

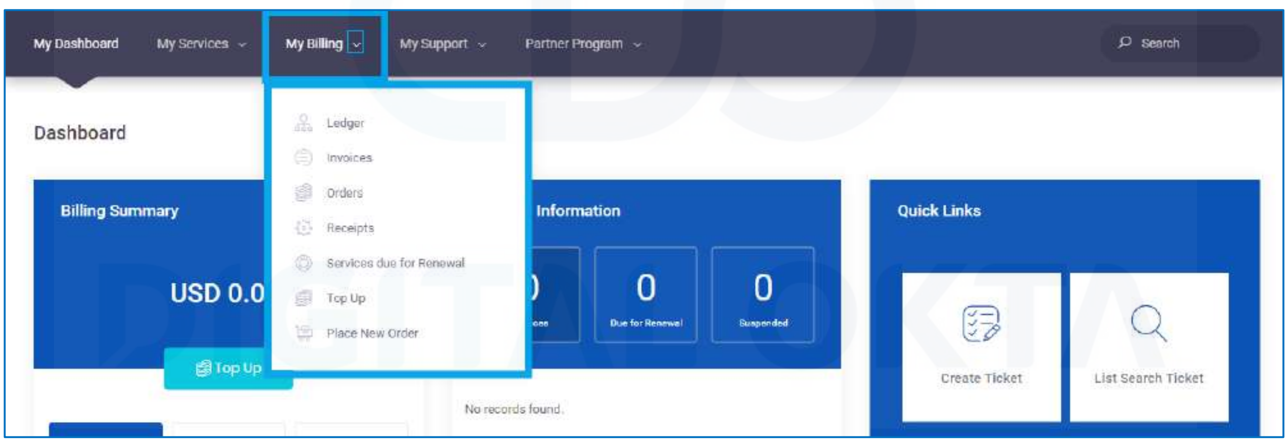
• My Receipts - The Receipts section lists all the receipts generated for your transactions.

• My Services Due for Renewal - The Services Due for Renewal section lists all your services that are due for renewal or need to be renewed in a short while.

• Top-up - Through this section, the customer can add fund in his account.

• Place New Order - Through this section, the customer can place an order for a new product.

See the screenshot of the My Billing section:



My Ledger

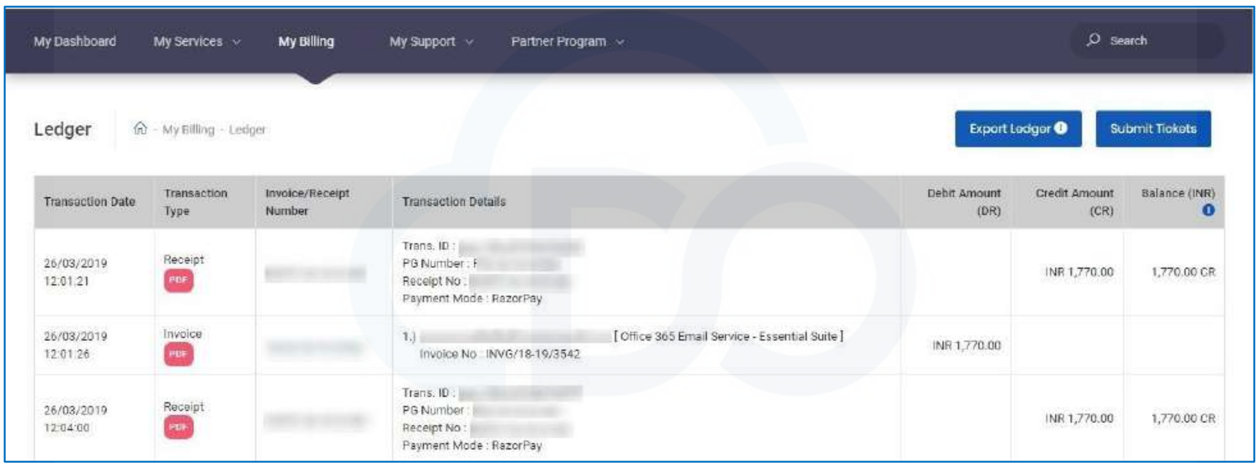
Overview

Home >> My Billing >> Ledger

To access the Ledger section from your member panel dashboard:

- Click on the My Billing tab on the member panel dashboard and then click on Ledger on My Billing menu.

See screenshot for the Ledger section:



The Ledger section lists all the transactions that you have made.

Here, the information about each transaction in the ledger is listed in the below-given sequence.

- Transaction Date – Transaction Type – Invoice/Receipt Number – Transaction Details – Debit Amount – Credit Amount – Balance (Current balance in your account where CR = Credit Balance, DR = Debit Balance)

Here, the customer can also do the following:

Download Receipt/Invoice: To download any receipt or invoice click on the PDF button provided in the Transaction Type column below every transaction.

View or Download Invoice: Click on an Invoice number to open it. You can either directly view it here Or click on the Download button to download the invoice.

Export Ledger

To export the complete transaction details in the ledger in a CSV (Excel) file:

- Click on the Export Ledger button.

Submit Tickets

The customer can also raise support tickets from here.

- Click on Submit Ticket button adjacent to the Export Ledger button.
- Create a ticket form will open.

You can check the entire process of creating a new ticket here.

My Invoices

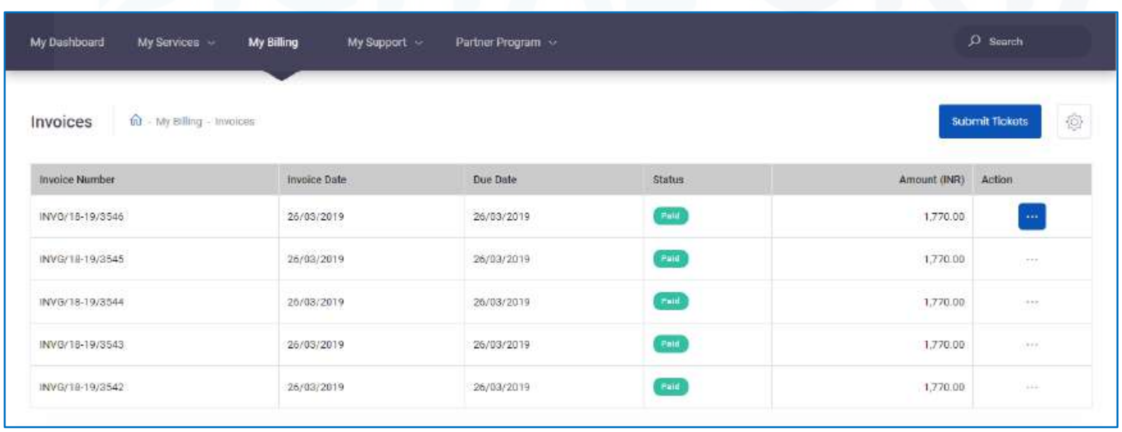
Overview

Home >> My Billing >> Invoices

To access the Invoices section from your member panel dashboard:

- Click on the My Billing tab on the member panel dashboard and then click on Invoices under My Billing menu.

See sample screenshot:



The Invoices section lists all your generated invoices. Here, your invoices are categorized in two sections viz.

- Paid

- Unpaid

Here, the information about each invoice is listed in the below-given sequence.

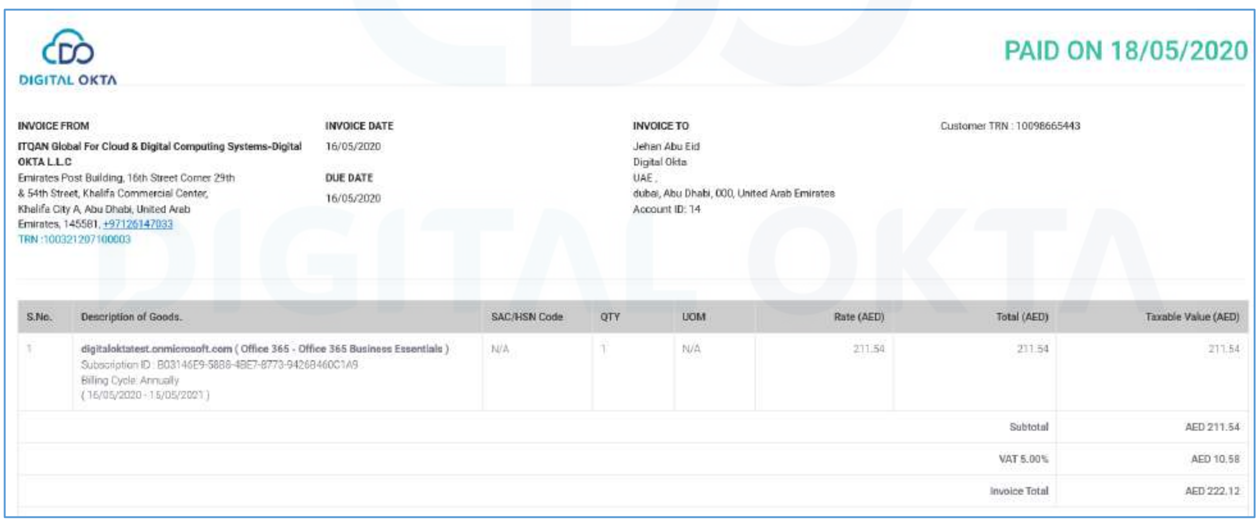
- Invoice Number – Invoice Date – Due Date – Status (Paid/Unpaid) – Amount – Action

View Complete Details of an Invoice

To view the complete details of an invoice:

- In front of the Invoice which you want to open, under Action Column, you will find an overflow menu. Select View Invoice from the overflow menu.

See sample screenshot of the Complete Invoice Details window:



DIGITAL OKTA

PAID ON 18/05/2020

INVOICE FROM
ITQAN Global For Cloud & Digital Computing Systems-Digital OKTA L.L.C
Emirates Post Building, 16th Street Corner 29th
& 54th Street, Khalifa Commercial Center,
Khalifa City A, Abu Dhabi, United Arab
Emirates, 145581, +97126147033
TRN :100321207100003

INVOICE DATE
16/05/2020

DUE DATE
16/05/2020

INVOICE TO
Jehan Abu Eid
Digital Okta
UAE ,
dubai, Abu Dhabi, 000, United Arab Emirates
Account ID: 14

Customer TRN : 10098665443

S.No.	Description of Goods.	SAC/HSN Code	QTY	UOM	Rate (AED)	Total (AED)	Taxable Value (AED)
1	**digitaloktatest.onmicrosoft.com (Office 365 - Office 365 Business Essentials)** Subscription ID : B03146E9-5888-4BE7-8773-94268460C1A9 Billing Cycle: Annually (16/05/2020 - 15/05/2021)	N/A	1	N/A	211.54	211.54	211.54
						Subtotal	AED 211.54
						VAT 5.00%	AED 10.58
						Invoice Total	AED 222.12

Download an Invoice as PDF

To download an invoice in a PDF format:

- Click on View invoice from the Actions column.

- Then, click on the Download Invoice button to download it in the Default PDF format.

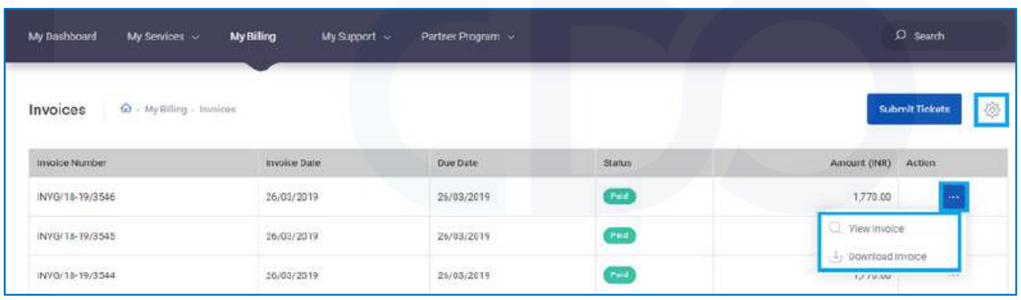
Filter Invoices based on Paid/Unpaid categories

To filter an invoice based on Paid/Unpaid:

- Click on right top Gear Icon >> Paid for all paid invoices.

- Click on right top Gear Icon >> Unpaid for all Unpaid invoices.

See sample screenshot:



You can also Submit Ticket from here using the **Submit Ticket** button provided next to the gear icon on top.

My Orders

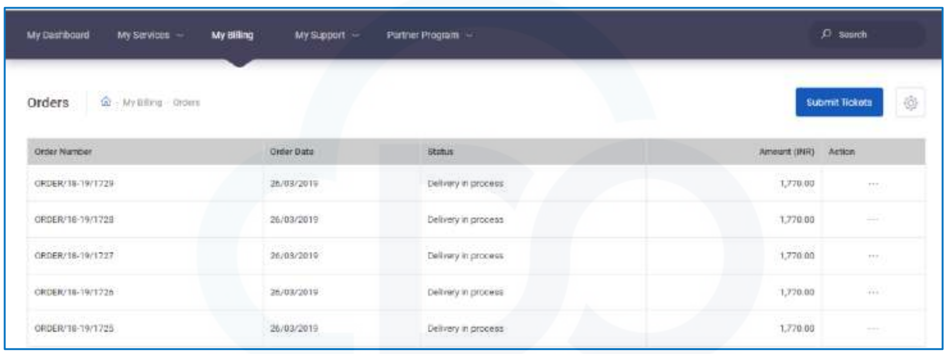
Overview

Home >> My Billing >> Orders

To access the Orders section from your member panel dashboard:

- Click on the My Billing tab on the member panel dashboard and then click on Orders button on the My Billing menu.

See screenshot of the Orders section:



The Orders section lists all the orders that you have placed.

The Orders section is categorized into five sections viz. - All, Due for Payment, Delivery in Process, Delivered, Cancelled.

Here, the information about each order is listed in the below-given sequence.

- Order Number – Order Date – Status – Amount – Action

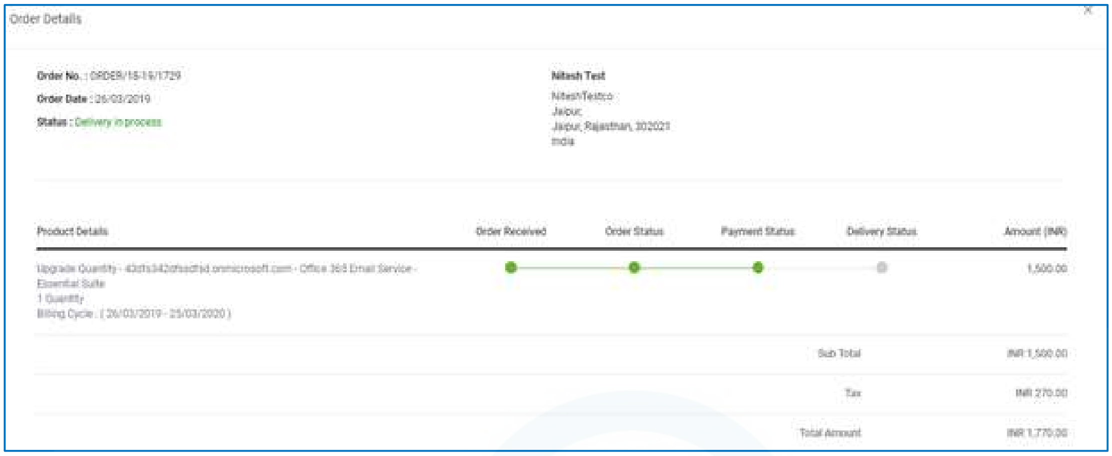
View Complete Details of an Order

To view the complete details of an order:

- Click on View Order under the Actions column in the Orders list.

- It will open the full details of that order in a modal pop up.

See screenshot:



If the Status of the Order is “Due for Payment”, the customer will get the additional options to:

Pay Order: By clicking on this, the customer can make payment for the order.

Cancel Order: The customer can also cancel the order by clicking on this button.

- Use the gear icon provided at the top right corner to filter the orders based on various parameters.
- Use Submit Ticket button near to the gear icon to raise tickets from here.

Cancel Order

To cancel one or more order:

- Select the order(s) you want to cancel.
- Click on Cancel Order tab.
- It should ask for confirmation. Once done, an Invoice Cancellation pop up will appear with Cancellation Reason and Description options.
- Select a cancellation reason from the drop-down and describe the cancellation reason in detail in the text area.
- Next, click on the Save button. This will save data and cancel the selected order.

If an invoice is already cancelled or is not generated for an order, then invoice cancellation popup will not be displayed.

My Receipts

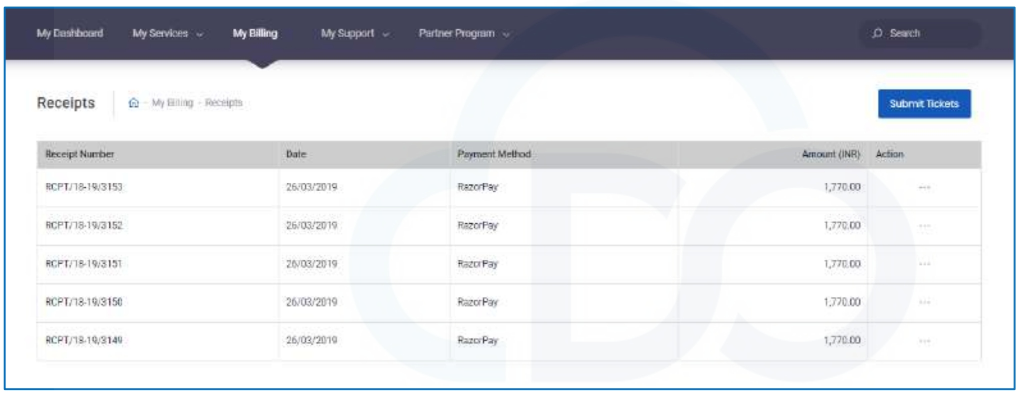
Overview

Home >> My Billing >> Receipts

To access the Receipts section from your member panel dashboard:

- Click on the My Billing tab on the member panel dashboard and then click on Receipts on the My Billing menu.

See screenshot of the receipts section:



The Receipts section lists all the receipts generated for your transactions.

Here, the information about each receipt is listed in the below-given sequence:

- Receipt Number – Date – Payment Method – Amount

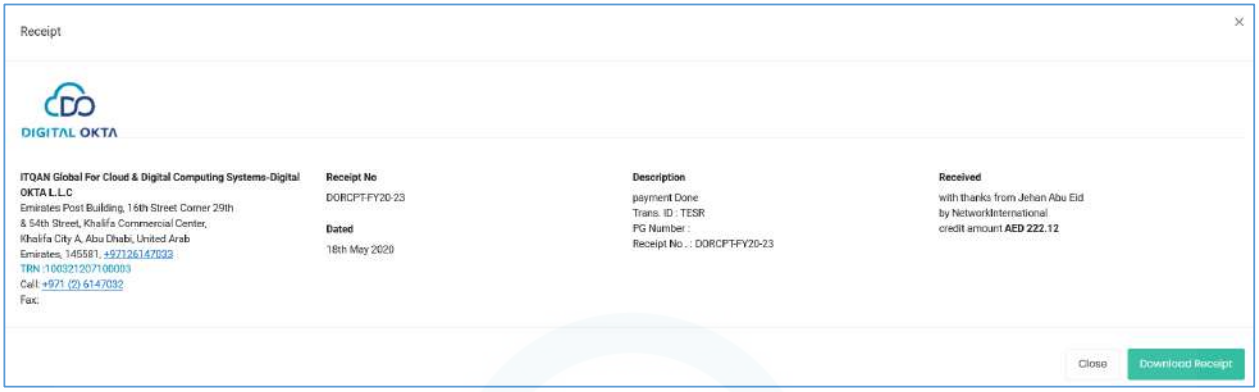
View Complete Details of a Receipt

To view the complete details of a receipt:

- From the Action column, click on the overflow menu in front of the receipt you want to see. Click on View Receipt from the menu.

- This will open a modal box with Receipt details.

See screenshot:

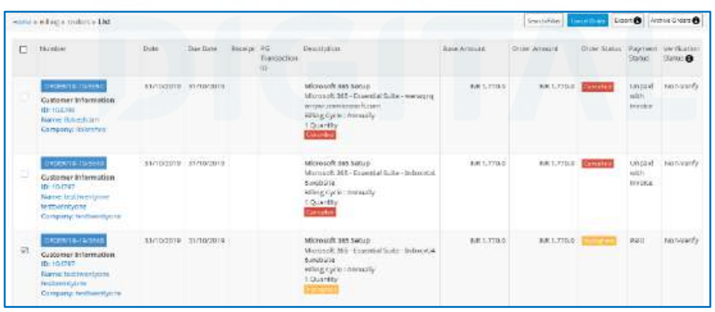


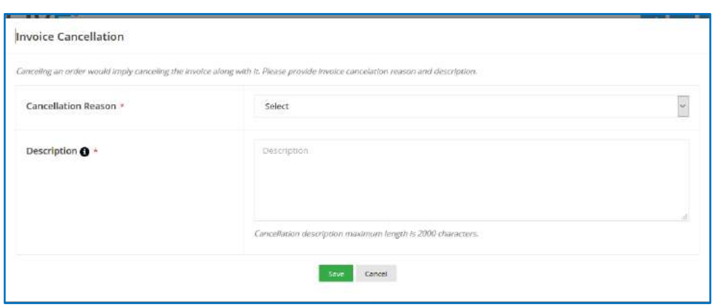
Download the Receipt

From the Action column, click on the overflow menu in front of the receipt you want to download. Click on Download Receipt from the menu.

You can also Submit Tickets from here using the Submit Ticket button on the top right corner.

See Screenshots



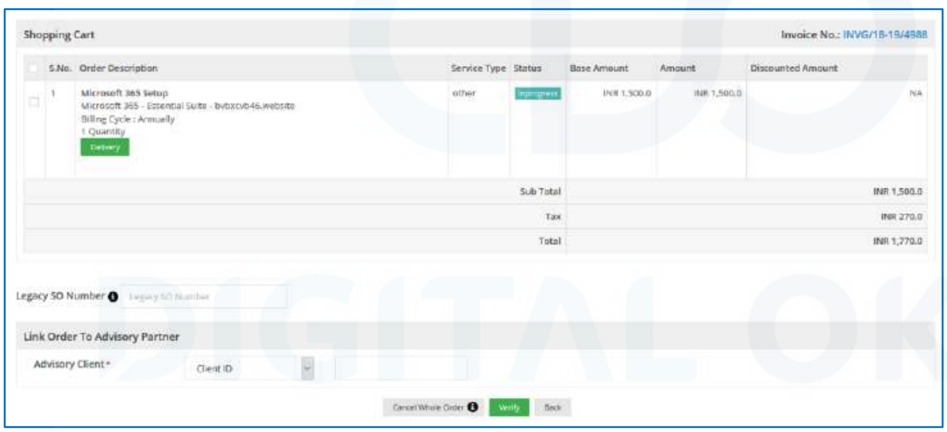


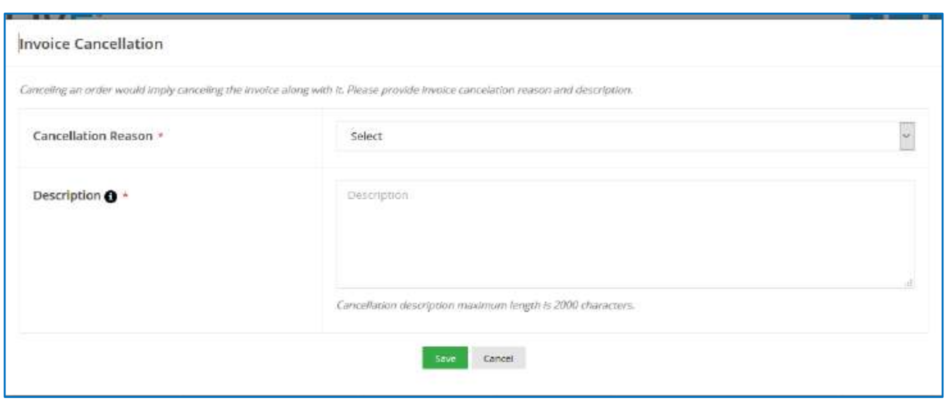
To cancel one order:

- Go to Order Detail page.
- Click on Cancel Whole Order tab.
- It should ask for confirmation. Once done, an Invoice Cancellation pop up will appear with Cancellation Reason and Description options.
- Select a cancellation reason from the drop-down and describe the cancellation reason in detail in the text area.
- Next, click on the Save button. This will save data and cancel the selected order.

If an invoice is already cancelled or is not generated for an order, then invoice cancellation popup will not be displayed.

See Screenshots





My Services due for renewal

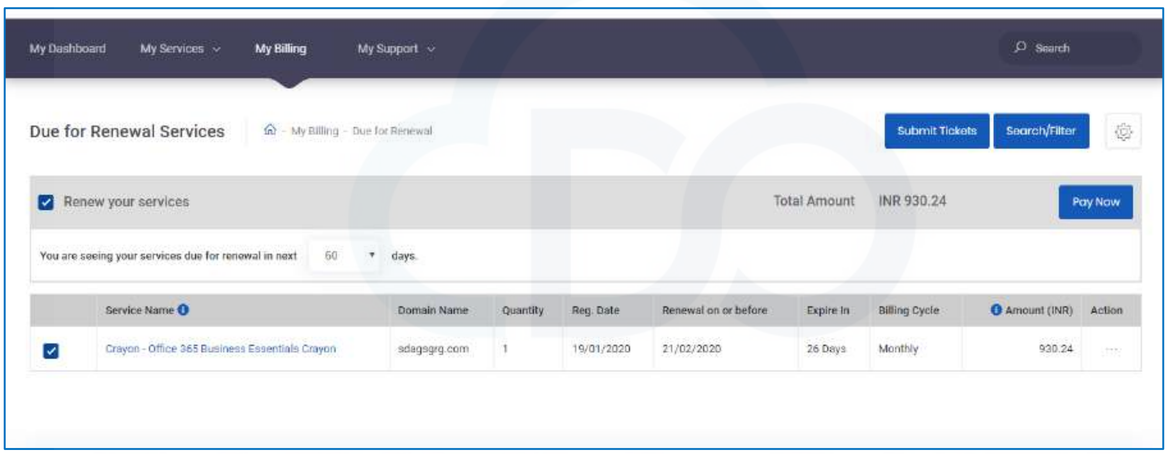
Overview

Home >> My Billing >> Services Due for Renewal

To access the Services Due for Renewal section from your member panel dashboard:

- Click on the My Billing tab on the member panel dashboard and then click on Services Due for Renewal button on the My Billing menu.

See screenshot of the services due for renewal section:



The Services Due for Renewal section lists all your services that are due for renewal or needs to be renewed in a short while.

The information about each service due for renewal is listed in the below-given sequence.

- Service Name – Registration Date – Due Date – Amount

On the right-hand side of these details, for every service, you can access a drop-down list of quick links. Using these links, you can do the following:

· Create a Ticket (for the respective service)

· Renew this service

· Submit Cancellation Request

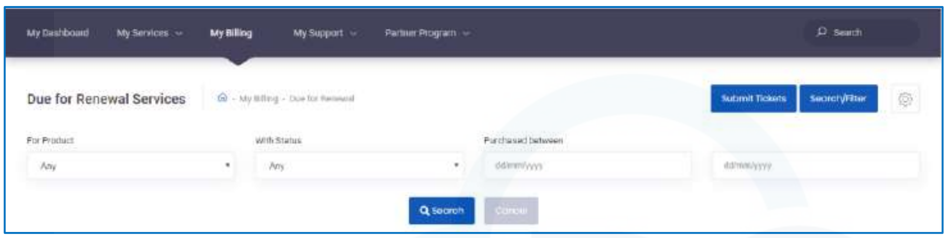
On the right top just on the left to Gear Icon there is a button called “Search / Filter”. Using this option, we can perform the advance searching on the service renewal table based on the following three inputs as following:

· For Product

· With Status

· Purchase Date (between any provided range of dates)

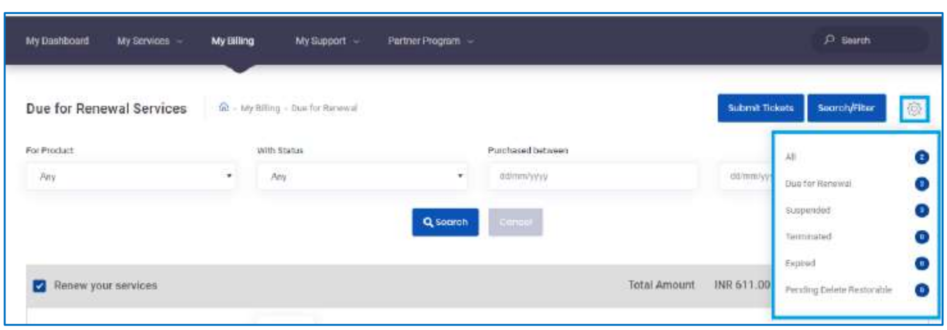
See a sample screenshot of “Search / Filter”:



On the right top Gear Icon Using this option, we can perform data filter on the service renewal table based on the following six categories:

- All
- Due for Renewal
- Suspended
- Terminated
- Expired
- Pending Delete Restorable

See screenshot:



Use Submit Tickets button provided near the Search/filter option to raise a new ticket.

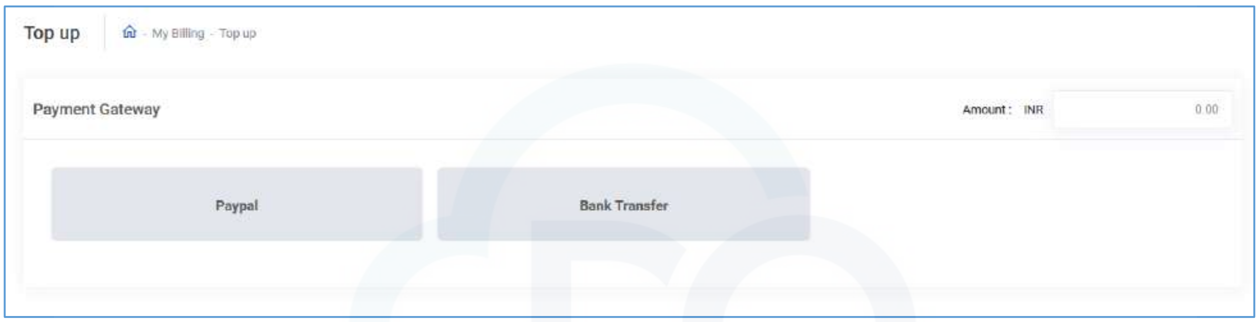
Top-up

Overview

Home >> My Billing >> Top-up

- Click on the My Billing button on the member panel navigation menu and then click on Top Up button on the My Billing menu.

See sample screenshot:



A new form will open with available payment gateways.

- Fill the amount.

- Select payment gateway

- After selecting the payment gateway, a confirm pop up box will appear to proceed with the chosen payment gateway.

The amount will be credited in your account.

Place New Order

Overview

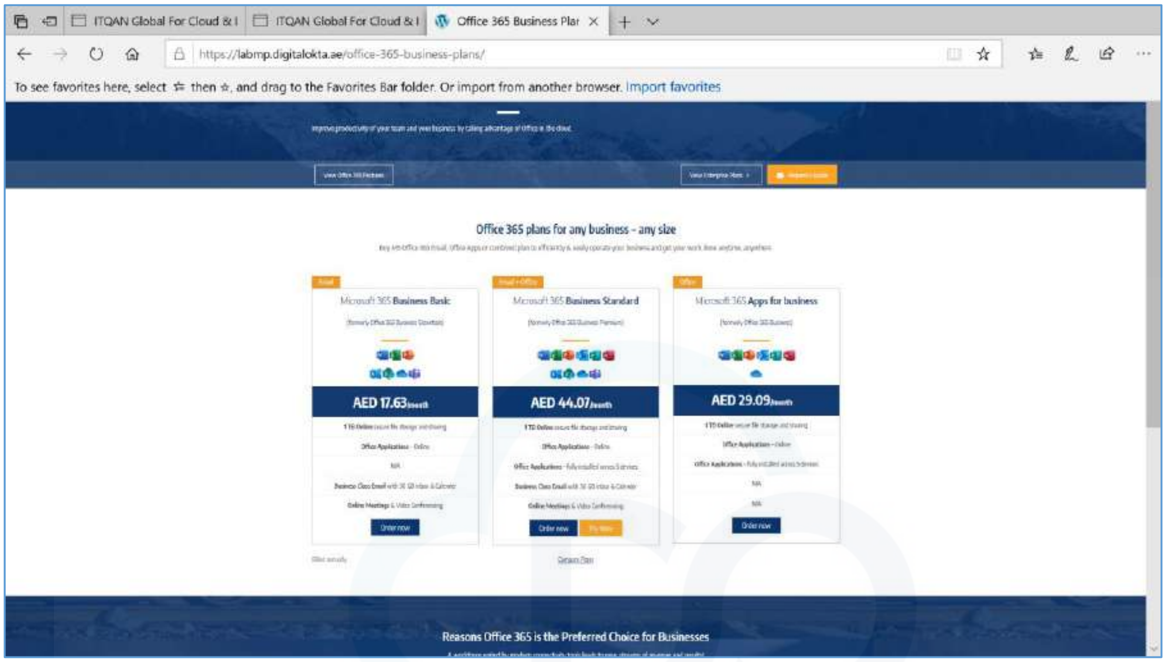
Home >> My Billing >> place new order

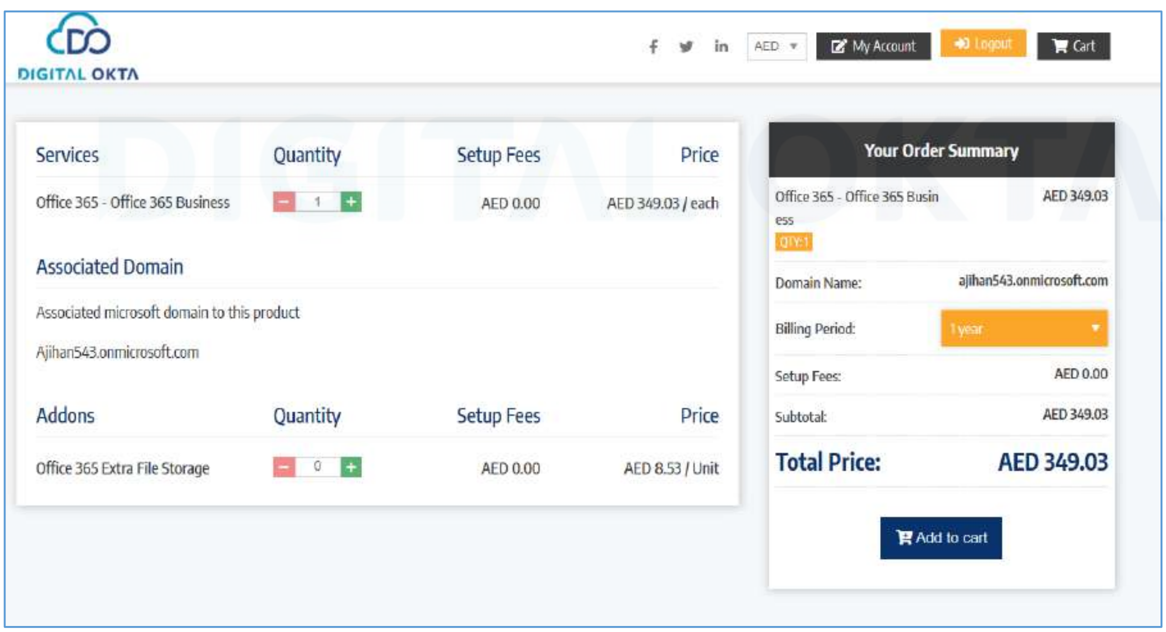
To access the Place New Order section from your member panel dashboard:

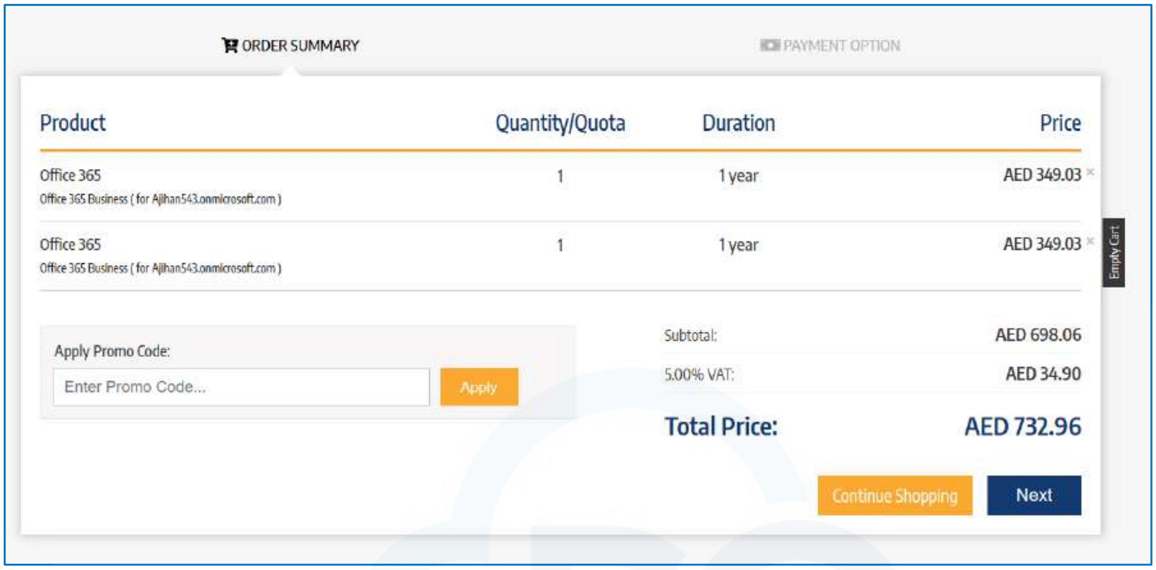
- Click on the My Billing button on the member panel navigation menu and then click on Place New Order button on the My Billing menu.

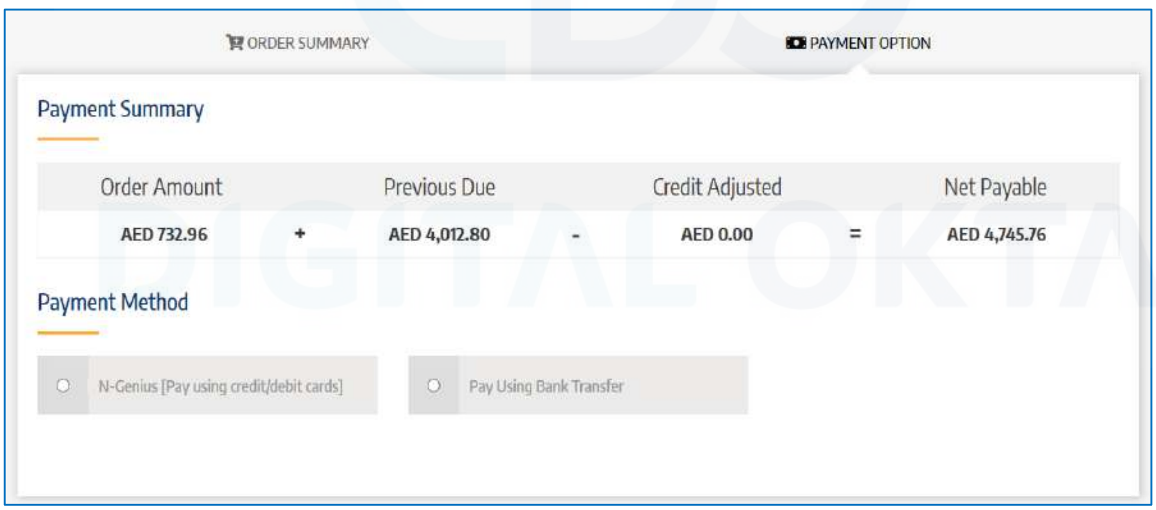
This will take the customer to the marketplace from where he can place any order.

See sample screenshot






ORDER SUMMARY
PAYMENT OPTION
Product
Quantity/Quota
Duration
Price
Office 365
Office 365 Business (for Ajihan543.onmicrosoft.com)
1
1 year
AED 349.03
Office 365
Office 365 Business (for Ajihan543.onmicrosoft.com)
1
1 year
AED 349.03
Empty Cart
Apply Promo Code:
Enter Promo Code...
Apply
Subtotal:
AED 698.06
5.00% VAT:
AED 34.90
Total Price:
AED 732.96
Continue Shopping
Next

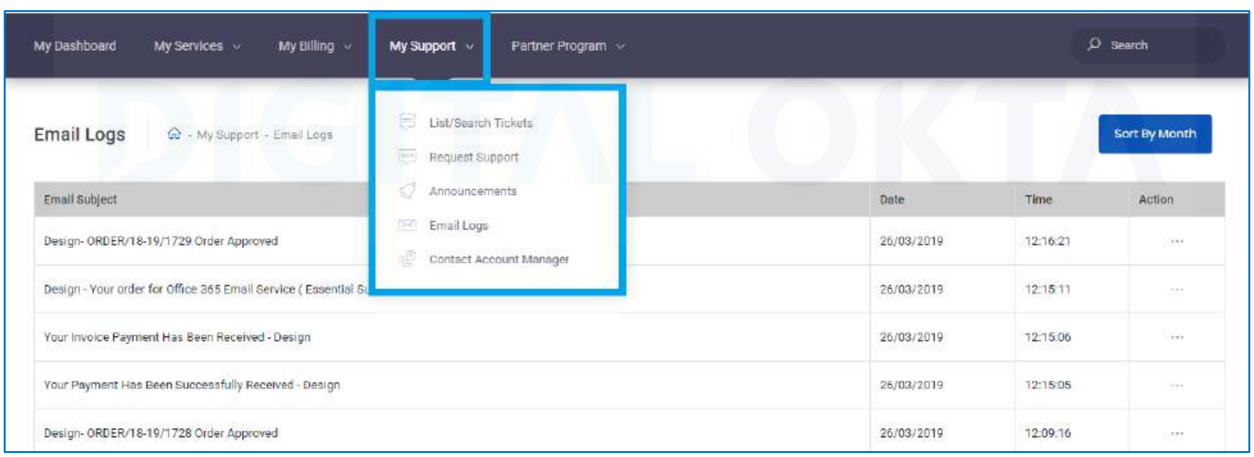

ORDER SUMMARY
PAYMENT OPTION
Payment Summary
Order Amount
Previous Due
Credit Adjusted
Net Payable
AED 732.96
+
AED 4,012.80
-
AED 0.00
=
AED 4,745.76
Payment Method
N-Genius [Pay using credit/debit cards]
Pay Using Bank Transfer

My Support

- List/Search Tickets - This section lists essential information about your open tickets and Services under maintenance. You get your support pin and client ID here.
- Request Support - My Tickets section lists all your support tickets that you have raised. You can view, reply, escalate, close and view your older tickets as well.
- Announcements - Announcements section lists all the announcements made about your services/products by your service provider.
- Email Logs - Email Logs section lists all the emails that have been exchanged between you and your service provider.

The customer can also directly contact his account manager from here by clicking on the **"Contact Account Manager"** option in the My Support menu. This will redirect him to his email.

See sample screenshot:



List/Search Tickets

Overview

Home >> My Support >> List/Search Tickets

Through this section, the customer can view all his tickets, post reply to an existing ticket, create a new ticket or escalate tickets.

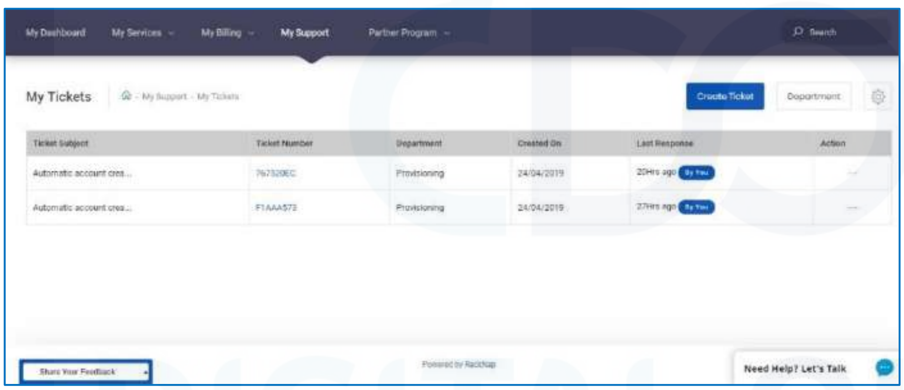
List/Search Tickets

To access the List/Search tickets section:

- Go to Home.

- Select List/Search Tickets from the My Support Menu.

See sample screenshot:



The information in this section is arranged in the following sequence:

Ticket Subject - Ticket Number - Department - Created On - Last Response – Action

Ticket Subject: The issue which was raised while creating a ticket is shown as the subject of the ticket.

Ticket Number: The ticket number is generated when you create a ticket.

Department: It will list the department to which the issue is addressed.

Created On: This will show the date on which the ticket was raised.

Last Response: It will show the time when the last response was made to the ticket.

Additional Actions: The overflow menu in front of the ticket will list the additional things that can be done here:

- *See Latest Response:* You can see the latest response to the ticket.
- *Close this ticket:* This will change the ticket’s status to close.
- *Escalate this ticket:* You can escalate this ticket to higher authorities like Duty Manager, Support Manager, Support HOD, Company Management.

Search/filter tickets

A customer can also apply filters in this section to narrow down the list of tickets. He can apply a filter based on Department button which is provided on the top of the ticket lists. (Please refer first screenshot)

He can also filter based on Ticket status:

- Click on the gear icon near the Department button and filter from the available categories of ticket - All, Awaiting your response, Awaiting, and Closed.

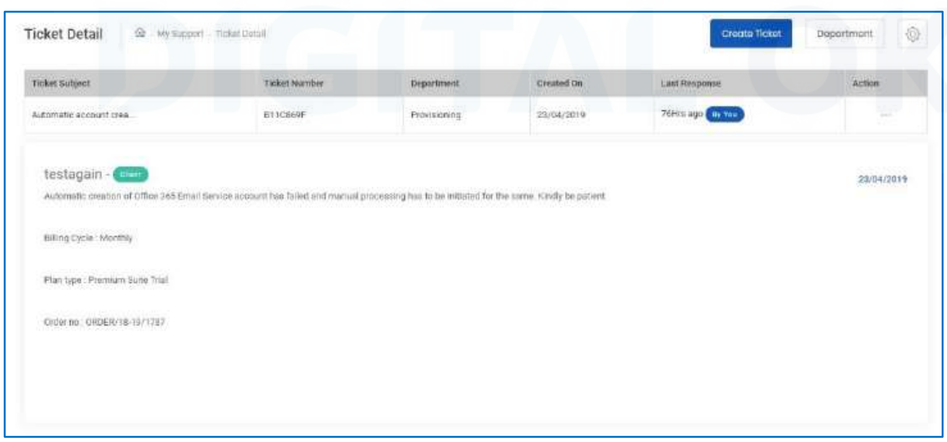
Ticket Details

To access the details of a ticket:

- On the ticket’s list/search page, click on a ticket number to open it.

This section will provide details related to created ticket like ticket subject, ticket number, department, the date on which the ticket was created, time duration since the last response was made on the ticket and some additional actions.

See sample screenshot:



Here, the customer can do the following:

In the Action column, on clicking the overflow menu, the customer will find the following options:

See Latest Response: Clicking on this will take the customer to the bottom of the page where he can see the latest response if any.

Reply Ticket: This will again take the customer to the bottom of the page, where he can enter his reply and click on Post Reply button to post his reply.

Whenever a reply is posted then a confirmation mail will be sent to a customer, and all the admins will also receive an email along with attachments (if any). If a customer does not get the required response from the ticket, live chat & direct call

Escalate Ticket: This option provides facility to a customer to raise a ticket to higher authorities like Duty Manager, Support Manager, Support HOD

Request Support

Overview

Home >> My Support >> Request Support

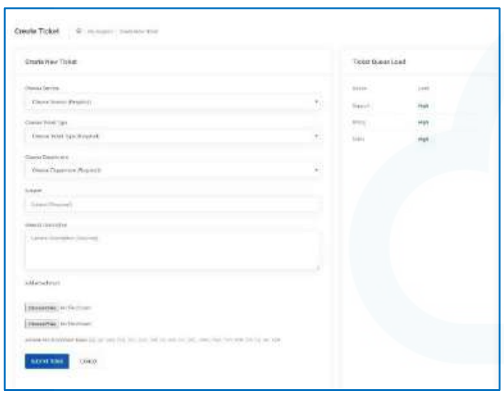
Through this section, the customer can raise a new ticket for his service-related issues and concerns.

To access the section:

- Go to Home.

- Select Request Support from the My Support menu.

See sample screenshot:



Create a new ticket

- Select a service from the Choose Service drop-down.

- Select a ticket type from the Choose ticket type drop-down.

- Select a department from the Choose Department drop-down.

- Enter the subject of the ticket.

- Provide a brief description.

- You can also add attachments.

- Once done, click on Submit Ticket.

- Whenever a customer submits the request for ticket creation, then a ticket will be created in the automation platform, and an email will be sent to the customer with confirmation that a ticket has been generated.
- All admins will also receive emails that a customer has generated ticket along with attached files (if any). This created ticket will be visible in the ticket lists section.

Announcements

Overview

Home >> My Support >> Announcements

To access the Announcements section from your member panel dashboard:

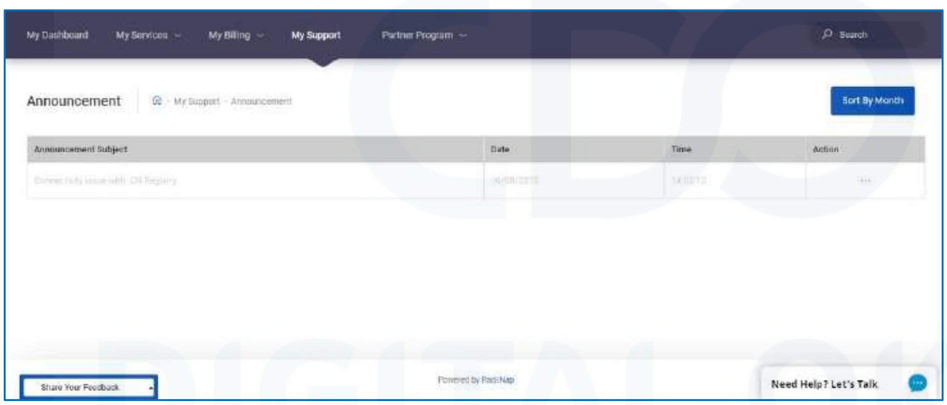
- Click on My Support tab on the member panel dashboard and then click on Announcements from the My Services menu.

The Announcements section lists all the announcements made for your information by your service provider.

Here, the information about each announcement is displayed in the below-given sequence.

- Announcement Subject – Date – Time – Action

See a sample screenshot of the Announcements section:



View an Announcement in Detail

To view any announcement in detail:

- From the overflow menu in the Action column, select See Announcement Detail. It will open a modal box with complete details of the announcement.

View Announcements of a Month

To view the complete list of announcements for a particular month:

- Select the month for which you want to see the announcements from the Sort by Month drop-down. (Please refer first screenshot)

- This will open the list of announcements made in that particular month.

Email Logs

Overview

Home >> My Support >> Email Logs

To access the Email Logs section from your member panel dashboard:

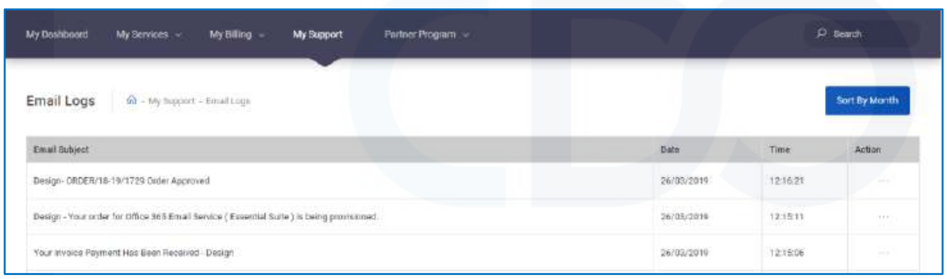
- Click on My Support tab on the member panel dashboard and then click on Email Logs on the My Services menu.

The Email Logs section lists all the emails that have been exchanged between you and your service provider.

Here, the information about each email is displayed in the below-given sequence:

- Email Subject – Date – Time – Action

See a sample screenshot of the Email Logs section:



View an Email Log in Detail

To view any email log in detail:

- From the overflow menu in the Action column, click on See Email Logs Details.

View Email Logs of a Month

To view the complete list of email logs for a particular month:

- Select the month for which you want to view the email logs from the Sort by Month drop-down list.

- - This will open the complete list of email logs for that particular month.

My Profile

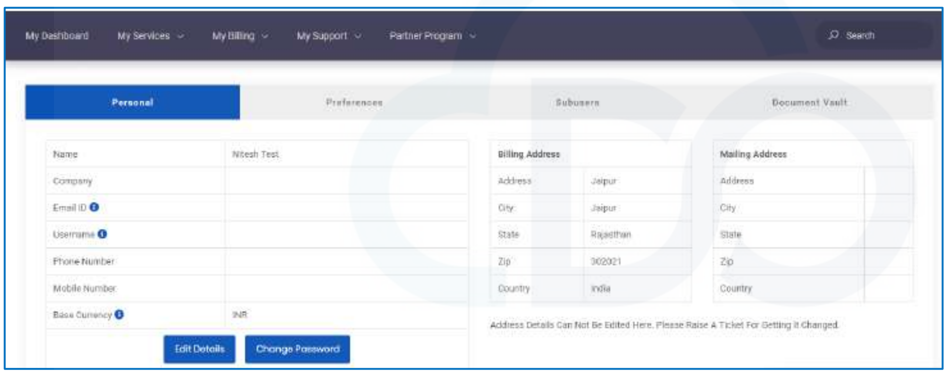
Personal Information - In this section, you can view and edit your personal details, your professional details and change account password.

Preferences - In this section, you can manage your preference settings for receiving Emails/SMS/Notifications related to your products or services.

Sub users - Sub users are the additional users to your account that can be given separate login credentials and granted limited permissions.

Document Vault - In this section, you can upload your identity verification documents.

See sample screenshot:



Personal Information

Overview

Home >> My Profile >> Personal

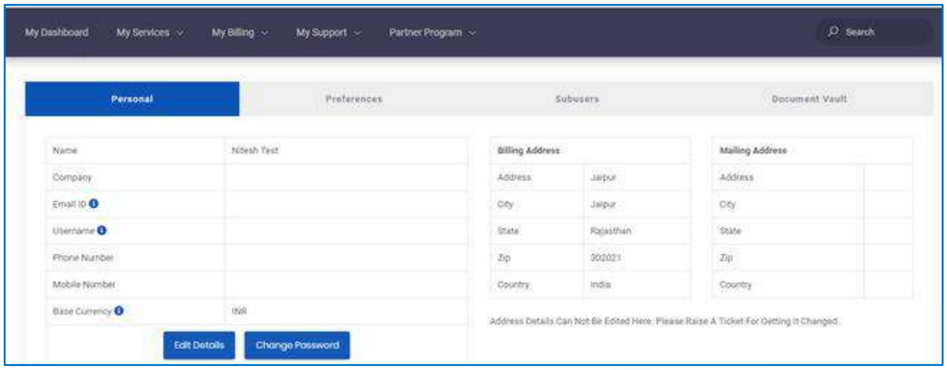
To view and edit your personal profile details in the Profile section:

- Click on My Profile from the top right corner of the screen where your profile pic is located.

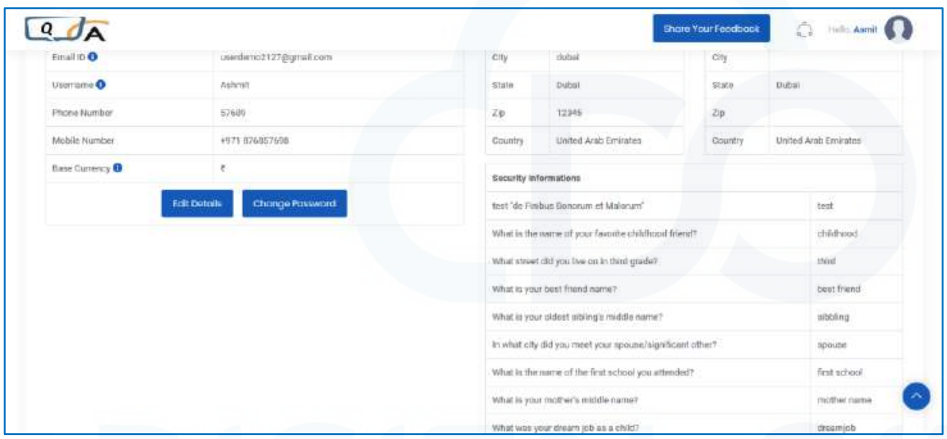
- This will open the My profile section. You will find four tabs - Personal, Preferences, Subusers, Document Vault.

- Click on the Personal tab in the Profile section.

See screenshot of the Personal Profile Details section



See screenshot of the Personal Profile Details section (When a user answers security questions)



Users who give answers to security questions will be able to see the security questions list in **Personal Profile Details** section.

Users who do not to give answers to security questions won't see security questions list on their screen. (as shown in the first screenshot above)

Edit Personal Details

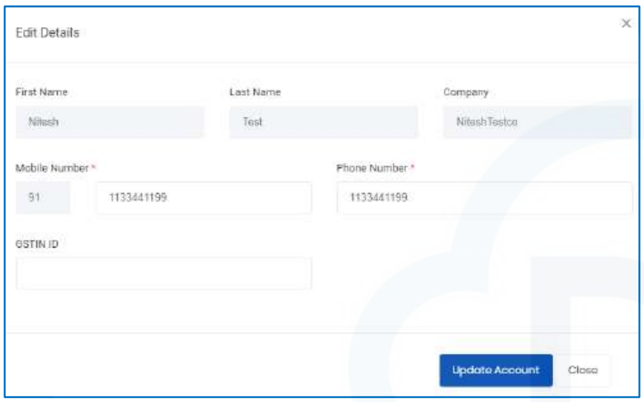
To edit your personal details:

- Click on the Edit Details button in the Personal Information section.

- Enter/Edit the details in the Edit Personal Details window that appears.

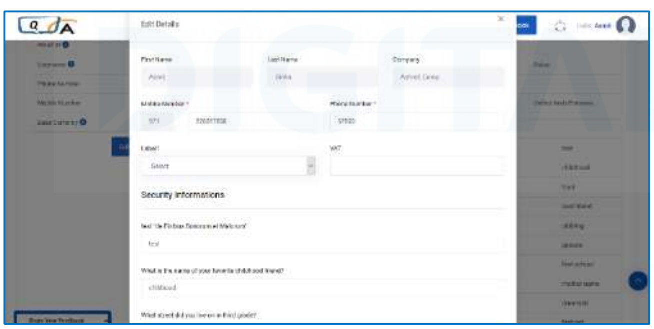
- Click on the Update Account button.

See screenshot of the Edit Personal Details section



By default, users cannot edit their **First Name**, **Last Name**, and **Company** from this section. If you want to change any of these, you have to raise a ticket in the support section.

See screenshot of the Edit Personal Details section (When a user answers security questions)



Users who give answers to security questions will be able to see security information in **Edit Personal Details** section. Users can update the answers to security questions from here.

Users who do not to give answers to security questions won't see security information on their screen. (as shown in the first screenshot above)

Change Your Account Password

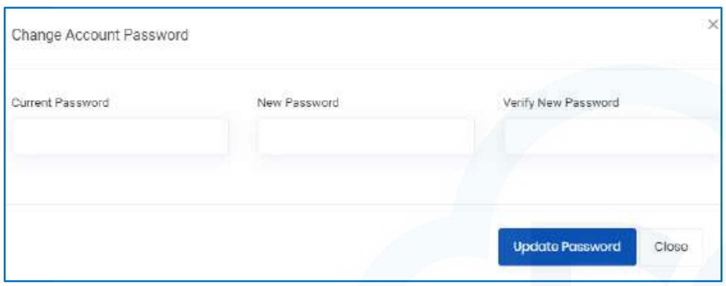
To change your Member panel account password:

- Click on the Change Password button in the Personal Information section.

- Enter the current and new passwords in the Change Account Password window that appears.

- Click on the Update Password button.

See screenshot of the Change Account Password window:



Preferences

Overview

Home >> Profile >> Preferences

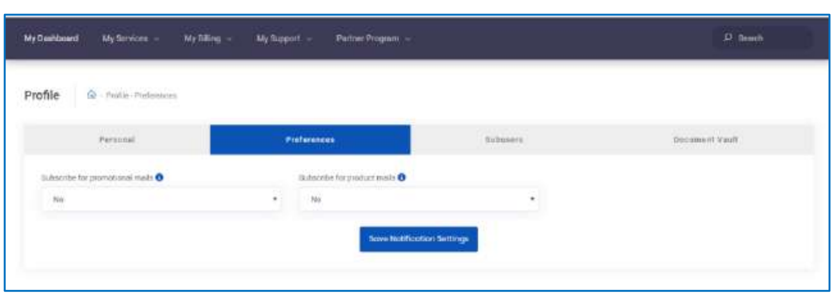
To manage your preference settings for receiving Emails/SMS/Notifications related to your products or services:

- Click on the Preferences tab in the Profile section.

In this section, you can:

- Set your preferences about receiving SMS and Email notifications related to different services.

See screenshot of the Notification Settings section:



To select your preferred notification settings

- Select an option from the drop-down list in front of a particular service.

- Click on the **Save Notification Settings** button to save the changes made.

Sub users

Overview

Home >> My Profile >> Subusers

To manage the Sub users of your account:

- Click on the Sub users tab in the Profile section.

Sub users are the additional users to your account that can be given separate login credentials and granted limited permissions.

Add a New Sub User Account

To add a new sub-user to your account:

- Click on the Add New Subuser button in the Sub users section.

- This will open up the Add New User window.

- Enter the details of the new sub-user.

- Tick Activate Sub-Account to enable the new sub-user account.

- Assign the rights and permissions by tick marking them.

- Click on the Save button.

Guidelines for adding Zip-code (same to be followed while editing sub-user account):

- It allows alphabets and digits with space and hyphen (-) character only.
- It provides space, the hyphen in between for field zip-code which are mandatory (count space, hyphen for
  length of the field)
- Max length will be as per the brand setting from admin panel if zero then no limit on length.
- No hyphen or space allowed in starting or ending of the zip-code.

Edit a Sub User Account

To edit the details or permissions of a sub-user account:

- Click on the Sub user account name in the Sub users section.

- Click on the **Edit User** button.

- This will open the **Edit User** window.

- Make the desired changes in the sub-user details and permissions.

- Click on the **Update** button.

Delete a Sub User Account

To delete an existing sub-user account:

- Click on the Sub user account name in the Sub users section.

- Click on the **Delete** User button.

Document Vault

Overview

Home >> My Profile >> Document Vault

To submit your identity verification documents:

- Click on the Document Vault button in the Profile section.

- Click on the Choose File button in the section related to your document (Government Issued Identification/Utility Bill/Credit Card/Other Requested Documents).

- Browse and select a file to upload.

- Click on the Upload button.

See screenshot of the Identity Verification section: