



User manual

Version 1.3



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Squid Live Demo Guide

- System requirements
- Setup your virtual machine
- Setup a valid license
- Using Squid

System requirements

- MACOS X 10.10 or later.
- Windows 7.x or later.
 - Processor Intel Core i3 or later
 - 8 GB RAM
 - 10 GB of free space on HDD
 - NIC @ 100 mbps or better
- Oracle Virtual Box software (open source).
- Latest version Google Chrome web browser.
- Internet connection to <https://license.cospace.cloud>

NOTE: its highly recommended to read at least Squid General Overview and Squid Billing sections of the Squid Support Center to understand how Squid works.

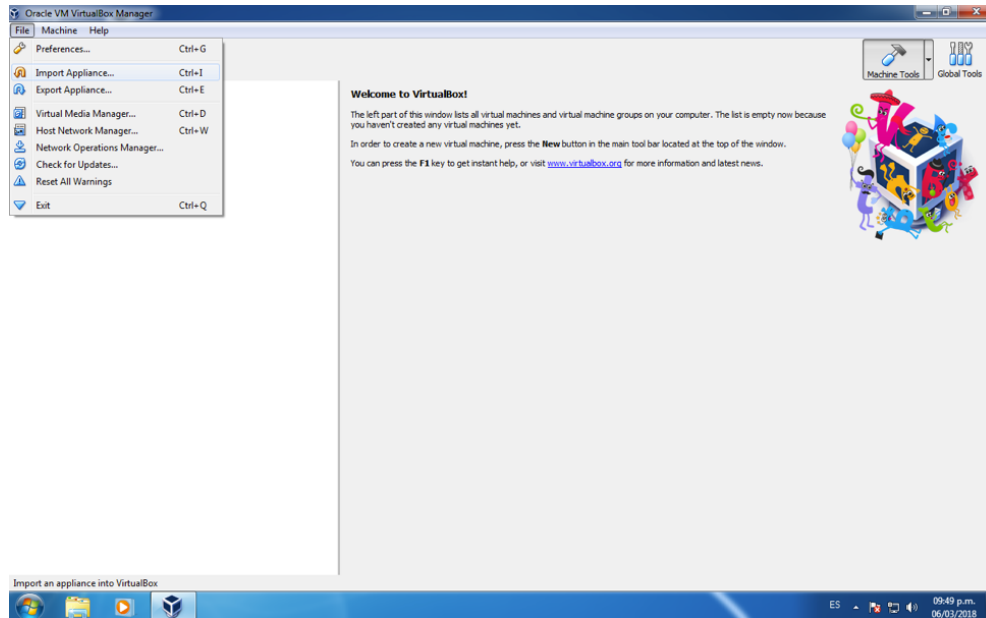
Setup your virtual machine

Squid Live demo runs as a virtual host, we recommend installing VirtualBox from Oracle, you can download the latest version from its site: <https://www.virtualbox.org/>.

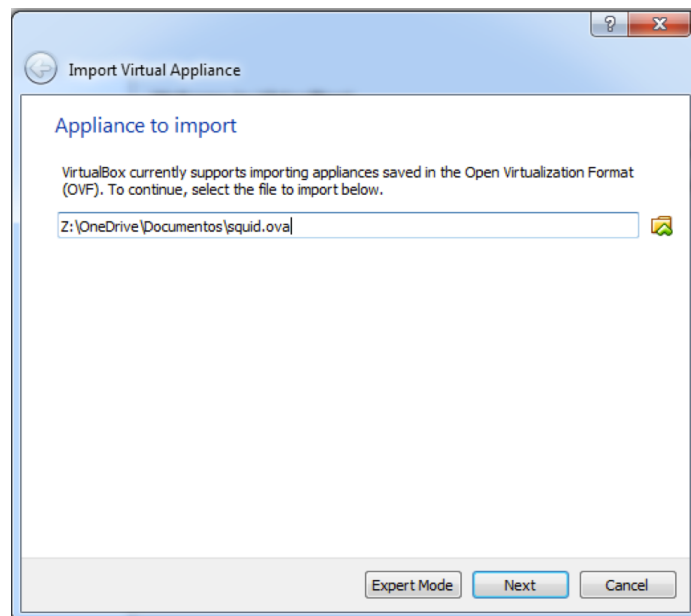
When VirtualBox is downloaded, and installed, the next step is to confirm that the file Squid Live OVA has successfully downloaded. Remember that to have this file you need to register in www.insightlevel.com/download.html.

Then, you can import OVA file into VirtualBox following next steps:

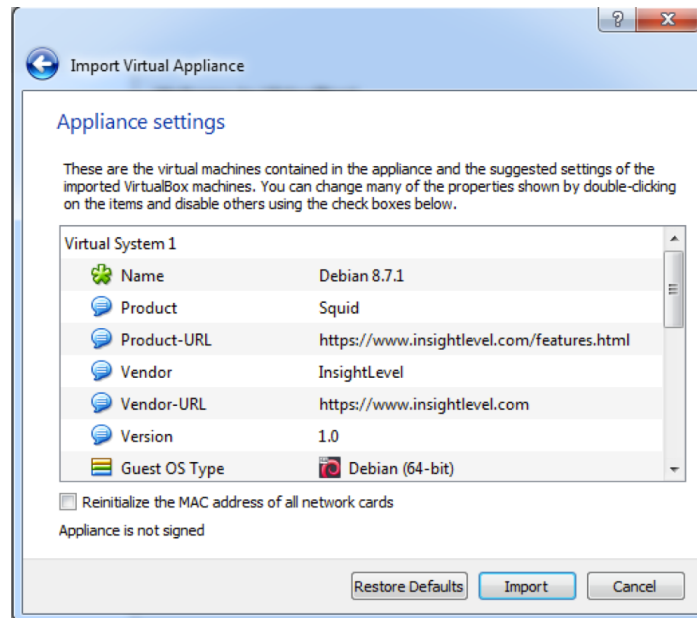
1. Open VirtualBox program and go to **File -> Import Appliance**.



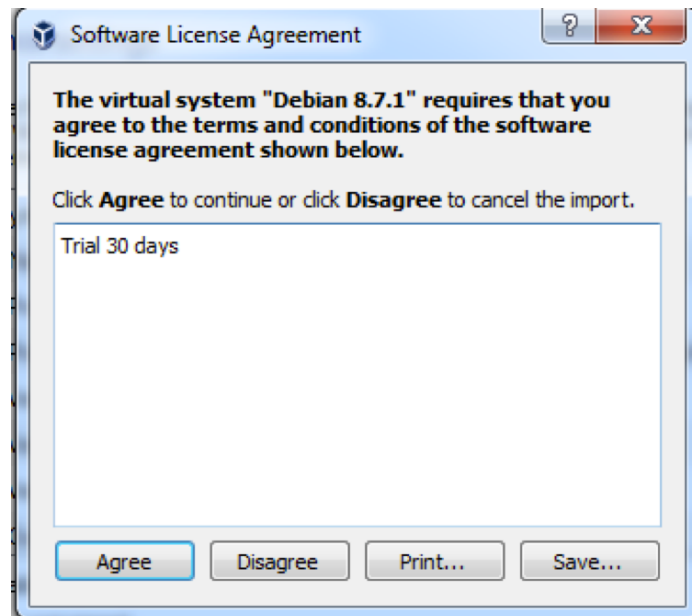
2. Locate the **squid.ova** file on your hard disk, select it and then click **Next**.



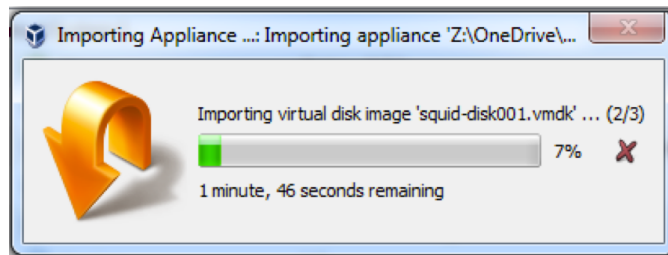
3. See the summary of the machine to be imported and click on **Import**.



4. Click on **Agree** when ask for TRIAL installation.

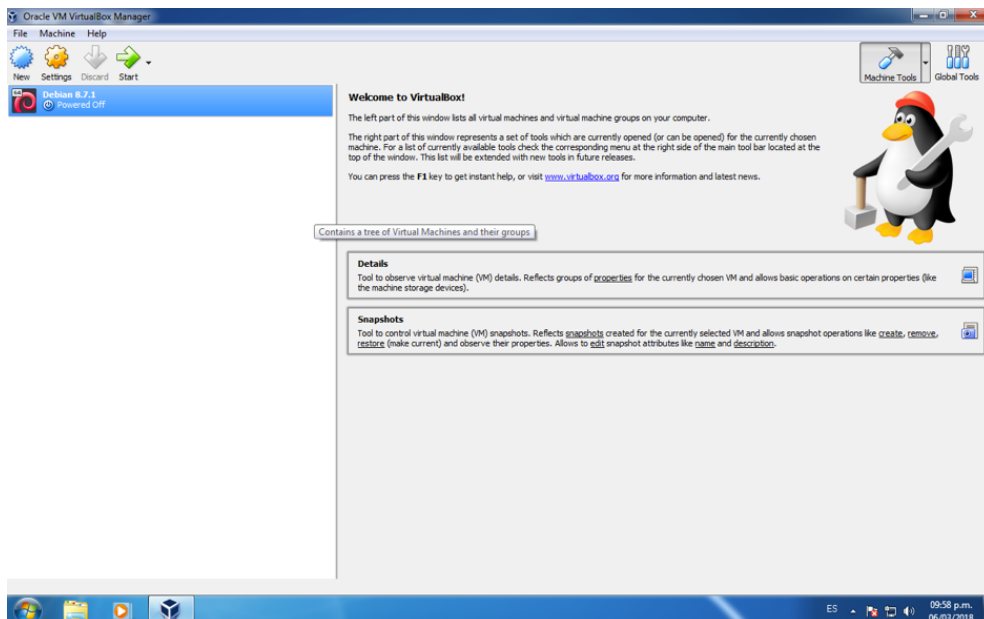


5. Import of the machine will start, please wait until it's finished.

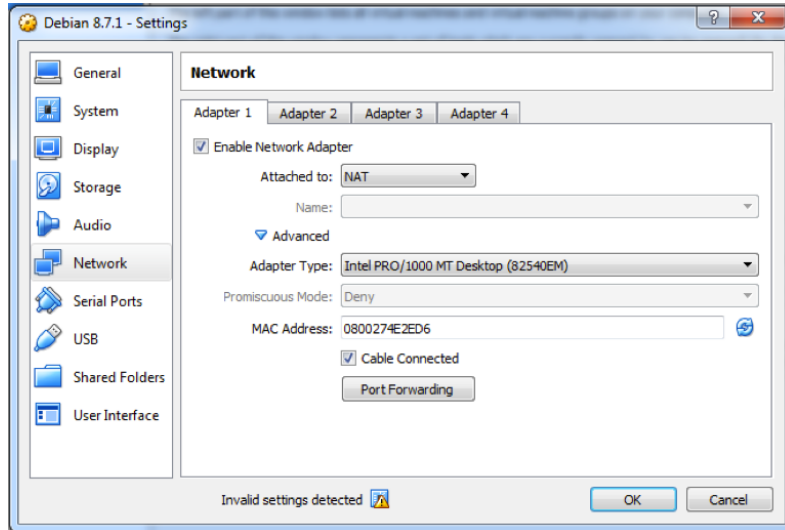


6. Once the virtual machine is finally imported and before starting the virtual host, you need to configure the **Port Redirection**, so first check configuration following these steps:

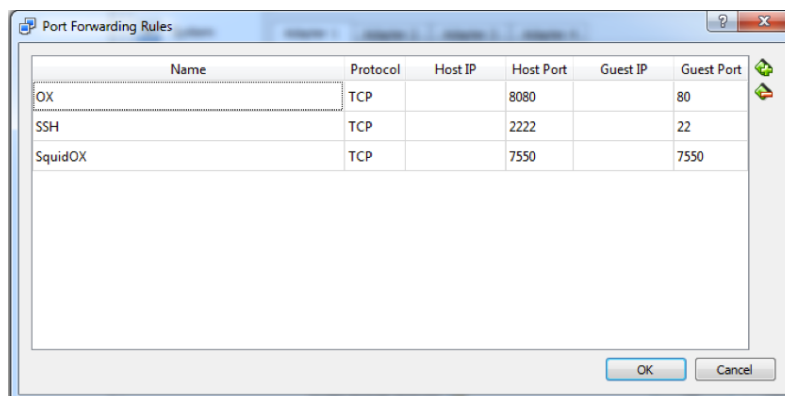
- a. Click on the virtual host Debian 8.7.1
- b. Then click on **Settings menu**.



- c. Then click on **Network -> Advanced -> Port Forwarding**.



- d. If they are not already created, create the next Port Forwarding rules by editing the fields on the port forwarding options, if they are already created just skip this step:



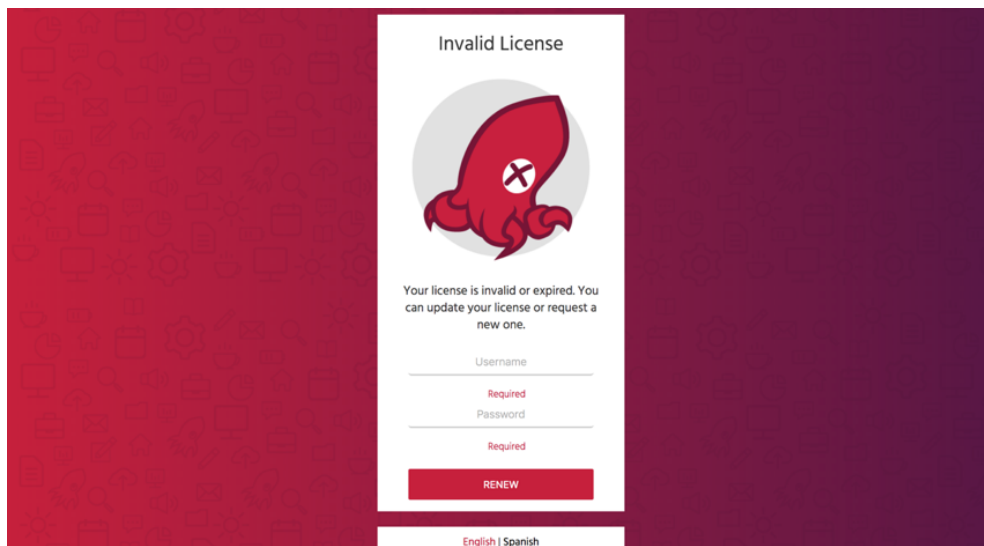
7. Now you can start your virtual machine!

NOTE: Virtual machine usually takes 2 o 3 minutes to start all the services, please be patient.

Setup a valid license

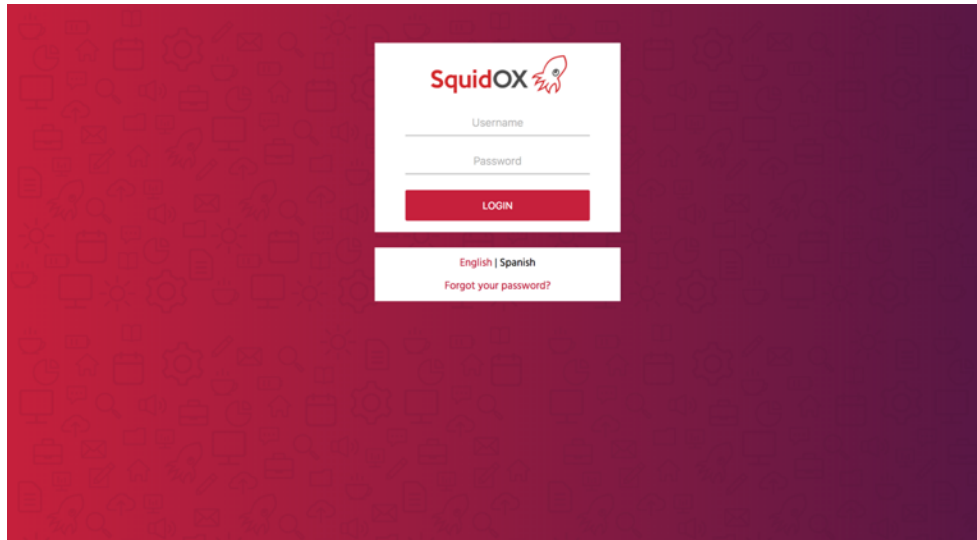
Once virtual machine is running, you can start Squid following the next steps:

1. Open a Google Chrome browser on your host machine and go to <http://localhost:7550/SquidOX-Core>.
2. Because the default Squid license is invalid, you need to use your e-mail address and password given by InsightLevel. If you still haven't those, please ask for them to your sales representative to receive your credentials to login into the Squid Platform.



NOTE: InsightLevel registration take 1 business day to send your information to your e-mail.

3. Once you provide a valid license, Squid will show you a login screen.



Using Squid

NOTE: All provisioned demo entities (users) use the same password: **il.123**

1. You can login with the Service Provider user. This is the top entity on the platform that can provision VARs; its credential is described below:
 - a. Username as Service Provider: **squid**
2. There is a small Squid's distributors network preloaded, which is composed by VARs, Resellers, ECs and users. In the same way, you can login with any of them depending on which part of the network or what entity you will use, users are:
 - a. Username as VAR: **var11.prepayment**
 - VAR: **var12.prepayment**
 - Reseller: **reseller12.prepayment**
 - Enterprise Customer: **ecl2.prepayment**

- b. Username as VAR: **var1.postpayment**
- c. Username as VAR: **var1.payasyougo**
 - Reseller: **reseller.payasyougo**
 - Enterprise Customer: **ec2.payasyougo**
 - Enterprise Customer: **ec.payasyougo**

Description of every entity can be found on Squid Support center on the General Overview Section.

3. Finally, once Enterprise Customers provision some users, you can use the email boxes in Open-Xchange. You can go to <http://localhost:8080/appsuite> and test them on App Suite platform. It will be needed to use the previous credentials for each user created and see the features assigned to them.

For a quick start guide to create the first VAR, and the first Enterprise Customer see this link: http://www.insightlevel.com/help/help_section.html?category=quickStart.

NOTE: You can create your own entities with different package features. For further details about Squid and all its features you can review Squid's Support Center here: <http://www.insightlevel.com/help/help.html>.

NOTE: For this TRIAL, the only features available are: OX PIM, OX Sync and OX Drive, so based on this scenario you can differentiate that a user is provisioned with mailbox + drive or just with mailbox.

IMPORTANT NOTE: AppSuite environment is not functional, it is just for testing integration and creation of mailboxes provided by Squid.



Squid Installer User Guide

- Introduction
- Requirements
- Installation

Introduction

Welcome to Squid Installation guide, this manual is designed to guide you through the Squid installation process, it describes the basics configuration and software requirements to install a fresh instance of Squid. This guide is intended as a quick walk-through and it assumes an existing installation of the operating system, database and an Open-Xchange deployment and requires average system administration skills.

Requirements

To install Squid, you need:

- Squid's installation script (can be found [here](#)).
- **Virtual machine is recommended**, so you can use KVM, Vmware, Hyper-V or any provider that support a Linux Debian distribution to install.
 - 1 vCPU @ 2Ghz
 - 4 GB RAM
 - 30 GB SSD
- The virtual machine or server must have been connected to a network with an internet connection (this is used to activate Squid software).
- Plain installed operating system [Linux Debian](#) 8.x or later, or any derivative operating system based on Linux Debian like Ubuntu, Kali Linux, etc. More information can be found on this [link](#).
- A valid SSH username and password is required user with root privileges on the operating system.
- Any MySQL 5.x Database installed and configured, you can use [MySQL community server](#), you'll require creating a user with the privileges to create and manage databases, see this [links](#) for more information:

- [Linux Installation Debian](#)
- [Using a Database](#)
- An Open-Xchange deployment based on App Suite On-premise or as OX as a Service (OXaaS) to install Open-Xchange see:
 - [AppSuite Open-Xchange Installation Guide for Debian 8.0](#)
 - Squid supports Open-Xchange App Suite versions 7.8.2 and 7.8.3 by default, so regarding the guide when configure the repository for download software please use one of the following options:
 - Deb <http://software.open-xchange.com/products/appsuite/7.8.3/appsuiteui/DebianJessie/> /
deb <http://software.open-xchange.com/products/appsuite/7.8.3/backend/DebianJessie/> /
 - deb <http://software.open-xchange.com/products/appsuite/7.8.2/appsuiteui/DebianJessie/> /
deb <http://software.open-xchange.com/products/appsuite/7.8.2/backend/DebianJessie/> /

On the **Add Open-Xchange Repository** section in this guide:

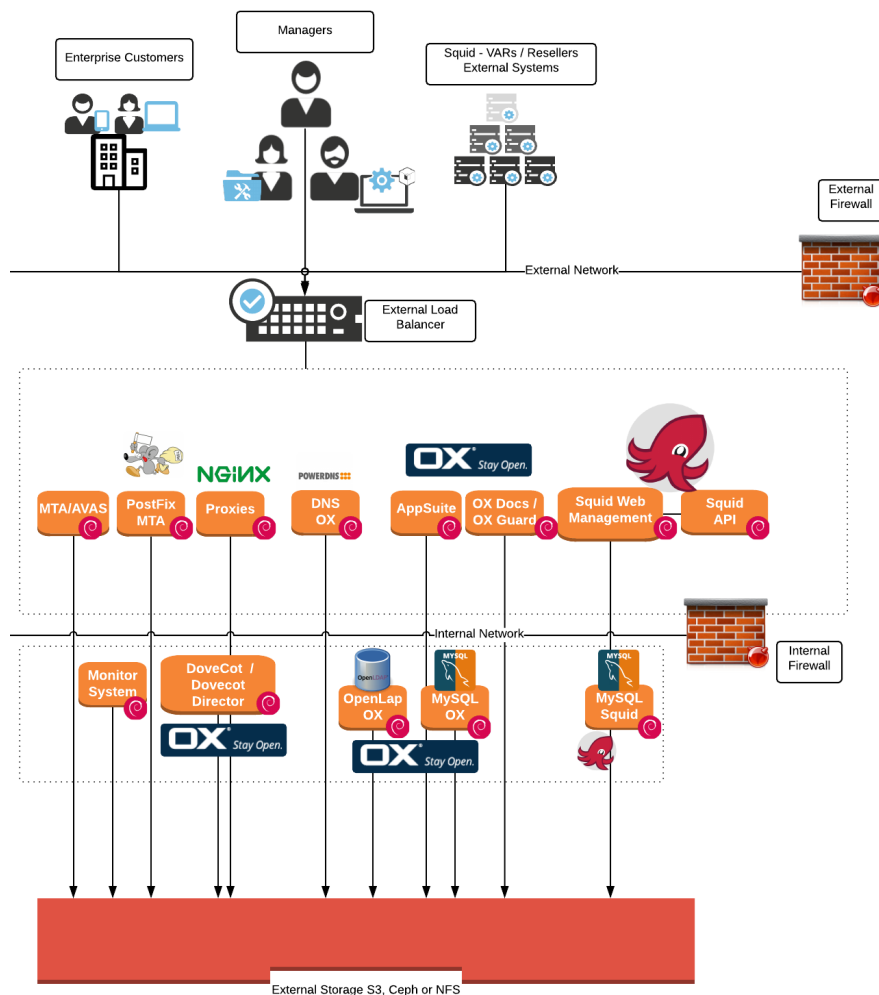
- Open-Xchange API SOAP installed and configured.
- Postfix installed as a MTA for Open-Xchange App Suite.
- Squid username and password credentials, these will be provided by e-mail once you are registered for download Squid.

NOTES:

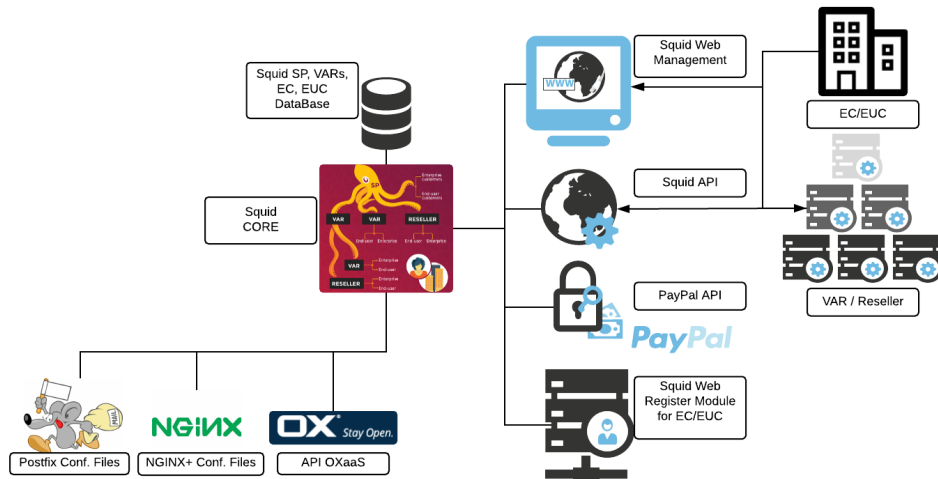
- If you have a different Open-Xchange deployment or a different Open-Xchange version, Squid still can be installed but need to do some specific changes on API integration, in that case you can [contact us](#) and we will be pleased to help you to deploy Squid successfully on your environment.

- It is always recommended to install Squid on the same private network where Open-Xchange App Suite SOAP package is installed, or at least set firewall access rules to allow bidirectional communication between Squid and Open-Xchange App Suite SOAP.

Here is a couple of diagrams of a recommended network schema about Squid installation with Open-Xchange App Suite in a OXaaS or On-Premise deployment.



Squid Network Schema, deployed on the same network as Open-Xchange App Suite.



Squid Concept Diagram.

Installation

To install Squid:

1. Go to [Squid Download page](#).
2. Register your data for download, it's important to register a valid email address because this email address will be used to deliver Squid credentials.
3. Download Squid installation script.
4. On the operating system, with a MySQL database installed and configured please copy and execute the installation script with a SSH user with root privileges.

Detailed Steps:

A. Executing squid-setup.sh

1. Run installer script as root user or with any user but using sudo command in your operating system.

```
./squid-setup.sh --configure
```

```
-c | --configure: Starts Squid's setup
```

```
-h | --help: Shows help of Squid's setup
```

```
[root@54f25f3086a3:/home# ./squid-setup.sh --configure
```

2. Wait for Linux dependencies to be installed, script will download and install all the dependencies required.

```
=====
Squid Installer Environment
Version 1.0.0
By Insight Level
=====
Starting Squid installation wizard.....
1.===== INSTALLING INITIAL RESOURCES =====
Reading package lists... Done
Building dependency tree
Reading state information... Done
git-core is already the newest version (1:2.11.0-3+deb9u2).
0 upgraded, 0 newly installed, 0 to remove and 35 not upgraded.
Reading package lists... Done
Building dependency tree
Reading state information... Done
unzip is already the newest version (6.0-21).
```

3. The setup script will request to select your Open-Xchange App Suite version.

```
4.===== PLEASE CHOOSE YOUR OX VERSION =====
a) v7.8.2
b) v7.8.3
option:
```

WARNING: Because of the Open-Xchange API dependencies, if you select the wrong version, Squid will not operate correctly.

4. After selecting the Open-Xchange App Suite version, the script will download Squid sources showing a progress download status.

```
4.===== PLEASE CHOOSE YOUR OX VERSION =====
a) v7.8.2
b) v7.8.3
[option: a
Your OX version is: v7.8.2
!!=====Folders created successfully
5.===== DOWNLOADING & INSTALLING Squid RESOURCES =====
  % Total    % Received % Xferd  Average Speed   Time    Time     Time  Current
                                 Dload  Upload   Total   Spent    Left   Speed
 13 165M   13 22.8M    0     0  1660k      0  0:01:42  0:00:14  0:01:28 4592k█
```

5. Once all the sources are downloaded, the script will ask you to configure a specific TCP/IP port to deploy the web application server.

```
6.===== SETTING UP WILDFLY 10 APPLICATION SERVER =====
Would you like change the application server port(default port: 7550)? [Y/n]:
```

If you select **Y**, you must specify the TCP/IP port to use.

```
What port would you prefer to setting up to Wildfly server? 80█
```

If you select **n**, Squid will use the TCP/IP port 7550 by default.

6. Once Squid is installed a message will be displayed to continue with the installation wizard over an internet browser through the next URL: <http://your-host-url:port/Squid-Installer>.

```
Please Wait[Finishing the last configurations].....
!!===== Installation has finished!!!
!!===== Please continue on your internet browser
```

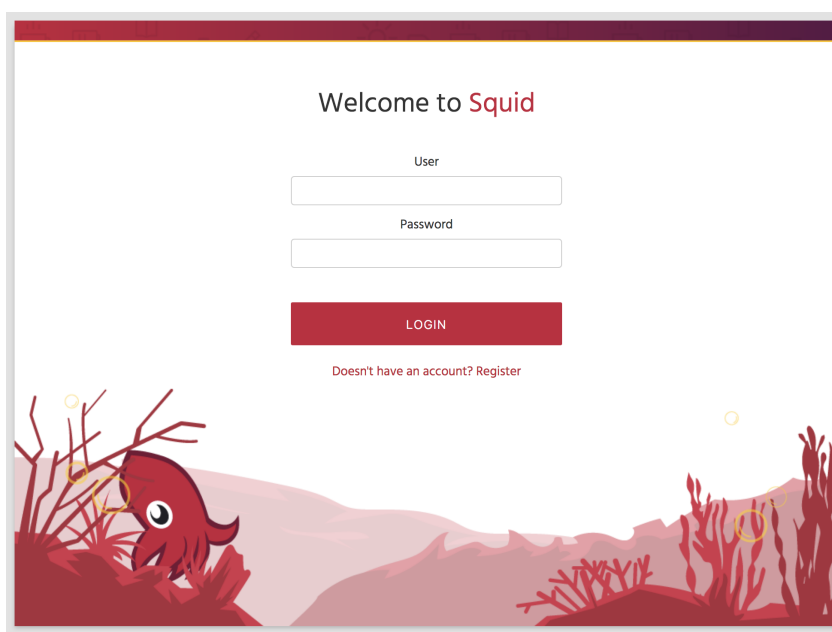
B. Configuring Squid through the installation Wizard

1. Squid Wizard Login

Once a welcome page is displayed, Squid Wizard will guide step by step for further Squid configurations.

In this first step you must enter your client credentials.

NOTE: These credentials will be delivered by e-mail once you are registered on InsightLevel's web site.



User:	Client's username.
-------	--------------------

Password:	Client's password.
-----------	--------------------

Login button:	Access to Squid wizard.
---------------	-------------------------

NOTE: If you click on Register you will be redirected to InsightLevel's registration page to register your data and receive your credentials by e-mail.

WARNING: The delivery of the credentials can take up to 1 business day, so it's always recommended first register your data, download the latest installation script and then proceed with the installation, if you receive Squid installation script from another source than the InsightLevel's web site.

2. Welcome Page

After entering your credentials data Squid, it will validate the info and will give you access to the welcome page where you must select the language, the Open-Xchange App Suite's architecture, define if your deployment is a fresh install of Open-Xchange App suite (not users previously provisioned) or a current deployment of Open-Xchange (with users already provisioned) and finally you must accept Terms and Conditions.

Available Languages are:

- English
- Spanish

Available Open Xchange's architecture:

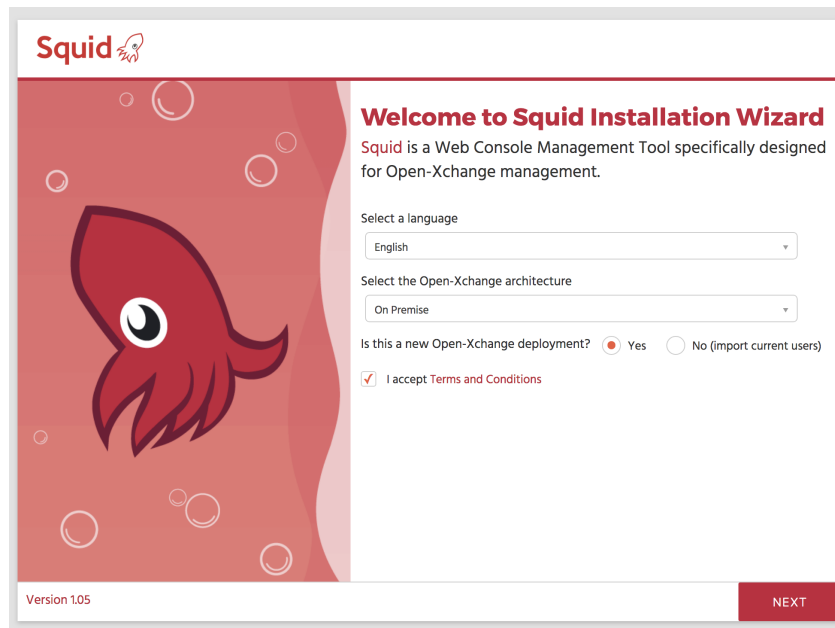
- OXaaS
- On Premise
- On Premise + LDAP

On the Option: **Is this a new Open-Xchange deployment?**

- Select **Yes** if your Open-Xchange App Suite is a fresh install without any user provisioned yet, otherwise choose "No (import current users)".

- If you selected **No (import current users)**, Squid will read Open-Xchange database and synchronize users into Squid database.

Check Terms and Conditions box to allow you to continue with the next step on the installation wizard.



The screenshot shows the 'Welcome to Squid Installation Wizard' screen. On the left is a red background with a cartoon squid and bubbles. The right side is white with the following text and controls:

- Welcome to Squid Installation Wizard**
- Squid is a Web Console Management Tool specifically designed for Open-Xchange management.
- Select a language: English (dropdown menu)
- Select the Open-Xchange architecture: On Premise (dropdown menu)
- Is this a new Open-Xchange deployment? ☒ Yes ☐ No (import current users)
- ☒ I accept [Terms and Conditions](#)
- Version 1.05 (bottom left)
- NEXT button (bottom right)

Once all the information is complete press **Next** button.

If there is a problem, an error will be displayed on screen with details. If not, you will be redirected to General Information Page.

3. General Information Page

Open-Xchange Deployment Options:

If you have selected Open-Xchange architecture as "OXaaS" or "On-Premise" you must enter the Open-Xchange API and MySQL server information.

Enter the Open-Xchange API information in the following fields:

- **Open-Xchange host:** This field is used to set the URL Open-Xchange API SOAP.
- **Master User:** This field is used to set Open-Xchange's Admin Master user defined on Open-Xchange installation.
- **Master Password:** This field is used to set Open-Xchange's Admin Master password defined on Open-Xchange installation.

MySQL Server is the database server where Squid will create his own database information.

Enter the MySQL server information in the following fields:

- **MySQL Host:** This field is used to set the IP address of the MySQL server database host used exclusively for Squid.
- **User:** This field is used to set MySQL database's username used for Squid.
- **Password:** This field is used to set MySQL database's password used for Squid.

The screenshot shows the 'General Information' window of the Squid Installer. It contains two sections of configuration fields. The first section is for Open-Xchange, with fields for 'Open-Xchange Host' (http://192.168.1.100/webservices), 'Master User' (oxadminmaster), and 'Master Password' (masked with dots). The second section is for MySQL, with fields for 'MySQL Host' (192.168.34.213:3306), 'User' (userAdmin), and 'Password' (masked with dots). At the bottom, there are 'BACK' and 'NEXT' buttons.

General Information	
Open-Xchange Host	http://192.168.1.100/webservices
Master User	oxadminmaster
Master Password
MySQL Host	192.168.34.213:3306
User	userAdmin
Password
BACK	NEXT

But if you selected “On Premise + LDAP” Open Xchange’s architecture, additionally you must fill the following fields:

LDAP Host:	This field is used to set the IP address of the LDAP server used by Open-Xchange.
User DN:	This field is used to set the LDAP’s user access.
Password:	This field is used to set the LDAP’s user access password.
Nginx Key:	This field is used to set the Nginx key from your Nginx configuration.

The screenshot shows the 'General Information' form in the Squid Installer. The form is divided into sections for Open-Xchange, LDAP, and MySQL configuration. The Open-Xchange section includes fields for Host, Master User, and Master Password. The LDAP section, highlighted with a grey background, includes fields for LDAP Host, User DN, Password, and Nginx Key. The MySQL section includes fields for MySQL Host, User, and Password. At the bottom, there are 'BACK' and 'NEXT' buttons.

General Information	
Open-Xchange Host	<input type="text" value="http://192.168.1.100/webservices"/>
Master User	<input type="text" value="oxadminmaster"/>
Master Password	<input type="password" value="....."/>
LDAP Configuration	
LDAP Host	<input type="text" value="192.168.1.120:389"/>
User DN	<input type="text" value="cn=oxadmin,o=oxcs"/>
Password	<input type="password" value="....."/>
Nginx Key	<input type="password" value="....."/>
MySQL Configuration	
MySQL Host	<input type="text" value="192.168.34.213:3306"/>
User	<input type="text" value="userAdmin"/>
Password	<input type="password" value="....."/>
BACK	NEXT

Once all the information is complete press **Next** button.

If there is a problem, an error will be displayed on screen with details. If not, you will be redirected to Server Information Page.

4. Server Information Page

This section is used to fill information about Proxies (Nginx) and MTAs (Postfix) servers of the Open-Xchange deployment.

Open-Xchange Proxy: This section is used to fill the relevant information about the Open-Xchange's proxy servers (Nginx).

IP:	This field is used to set the IP address of a proxy server.
SSH User:	This field is used to set the operating system SSH username to allow Squid to manage configuration files (user must have permission to write).
Password:	This field is used to set the username SSH password.
Path:	This field is used to set the path where Nginx configuration file is located.
Add More button:	This button is used to add another Open-Xchange proxy (Nginx) server, if required.

MTA for Open-Xchange: This section is used to fill information about the Open-Xchange's MTAs servers (Postfix).

Host:	This field is used to set the IP address of a MTA server.
SSH User:	This field is used to set the operating system SSH username to allow Squid to manage configuration files (user must have permission to write).
Password:	This field is used to set the username SSH password.

Path: This field is used to set the path where Nginx configuration file is located.

Add More button: This button is used to add another Open-Xchange proxy (Nginx) server, if required.

Once all the information is complete press **Next** button.

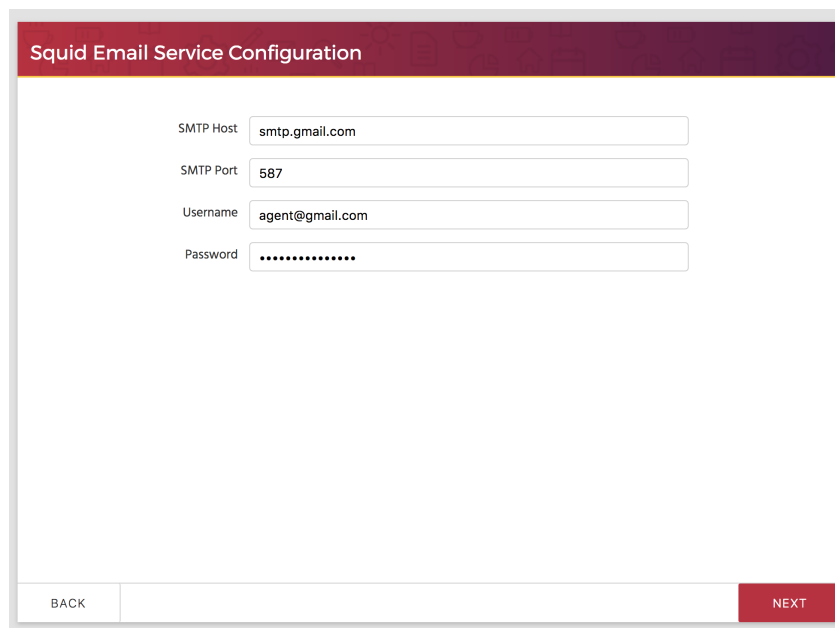
If there is a problem, an error will be displayed on screen with details. If not, you will redirect to Squid E-mail Service Configuration Page.

5. Squid E-mail Service Configuration Page

This section is used to configure the SMTP email server for Squid. This server is used to send email notifications, batch reports and receipts.

SMTP Host: This field is used to set the IP address of the SMTP host.

SMTP Port:	This field is used to set the TCP/IP port of the SMTP host.
Username:	This field is used to set the username to authenticate on the SMTP host.
Password:	This field is used to set the password to authenticate on the SMTP host.



Once all the information is complete press **Next** button.

If there is a problem, an error will be displayed on screen with details. If not, you will be redirected to Squid Master Account page.

6. Squid Master Account Page

This section is used to configure information about the service provider account that will be created in Squid. This is the Master Account used to manage Squid.

Service Provider:	This field is used to set the name of the Top Service provider in Squid.
Super Admin:	This field is used to set the super admin username.
Password:	This field is used to set the password for the super admin.
Email:	This field is used to set an email to bind with the super admin username, this email is used to reset the password when required.
User Manual button:	Link to go to Squid User Guide on web.

The screenshot shows the 'Squid Master Account' setup form. It has a dark red header with the title 'Squid Master Account'. Below the header, there are two main sections: 'SERVICE PROVIDER' and 'SUPER ADMIN'. The 'SERVICE PROVIDER' section has a 'Name' field with the value 'InsightLevel'. The 'SUPER ADMIN' section has four fields: 'User' (superAdmin), 'Password' (masked with dots), 'Email' (super.admin@insightlevel.com), and a 'User Manual' button with a download icon. At the bottom of the form, there are 'BACK' and 'NEXT' buttons.

Once all the information is complete press **Next** button.

If there is a problem, an error will be displayed on screen with details. If not, you will be redirected to Features Page.

7. Features Page

This section is used to look up the features included in your Open-Xchange installation, all the features available on your deployment will be displayed here. It's required to add prices for every feature that will be used in Squid's Packages; don't worry about the prices set here, these will be used as default, but can be changed any time through the Squid Administration Console.

The screenshot shows a web interface titled "Initial Catalog Configuration". Below the title is a section labeled "SET THE PRICES FOR OPEN-XCHANGE'S FEATURES". This section contains four input fields, each with a dark header and a light body:

OX Sync	OX PIM	OX Drive	OX Documents
\$ 0.5	\$ 1	\$ 2	\$ 0.5

At the bottom of the form, there are two buttons: "BACK" on the left and "NEXT" on the right, which is highlighted in red.

Once all the information is complete press **Next** button.

If there is a problem, an error will be displayed on screen with details. If not, you will be redirected to Discount Group Page.

8. Discount Group Page

This section is used to create the first Discount group in Squid, this configuration is required to start using Squid; don't worry about the discount group created here, this will be used by default for all the imported Valued Added Resellers in Squid database, this can be changed later any time on the Squid Administration Console.

Name:	This field is used to set Discount group name.
Initial range:	This field is used to set the initial number of packages to start applying a discount.
End range:	This field is used to set the final number of packages to apply discounts.
%:	This field is used to set the % discount to apply to the tier.
New tier button:	This button is used to add more tiers to the Discount group.
Delete button:	This button is used to delete a delete tier in the Discount group.

Initial Configuration for Discount Groups

GROUP NAME

Name

SELECT TIERS

Initial Range		End Range		%	
<input type="text" value="0"/>	to	<input type="text" value="1000"/>	=	<input type="text" value="5"/>	<input type="button" value="X"/>
<input type="text" value="1001"/>	to	<input type="text" value="5000"/>	=	<input type="text" value="10"/>	<input type="button" value="X"/>

BACK

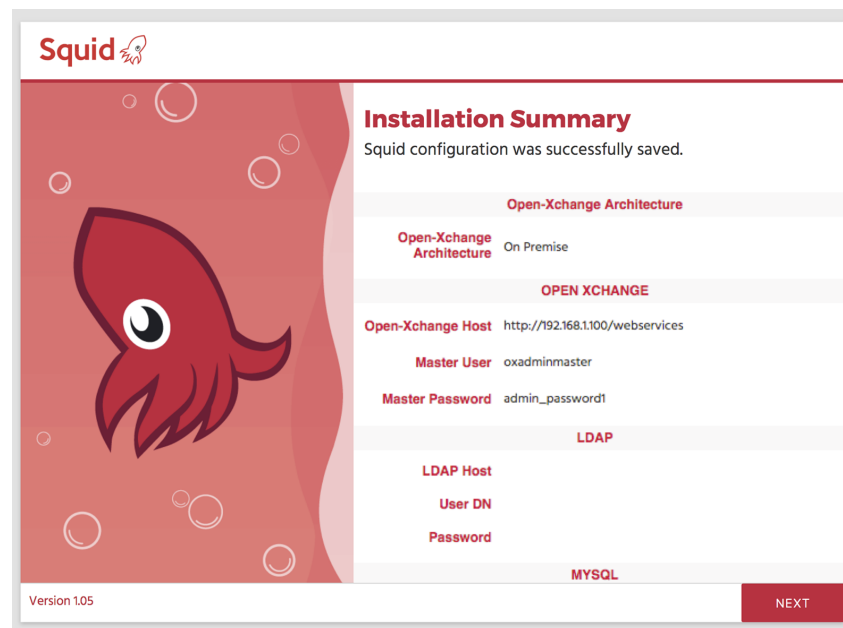
Once all the information is complete press **Next** button.

If there is a problem, an error will be displayed on screen with details. If not, you will be redirected to Resume Page.

9. Resume Page

This section will display the configuration details set, this page is used to give you a summary before proceeding to configure all parameters in Squid.

a. Resume Page



Press **Next** button to proceed to configure Squid.

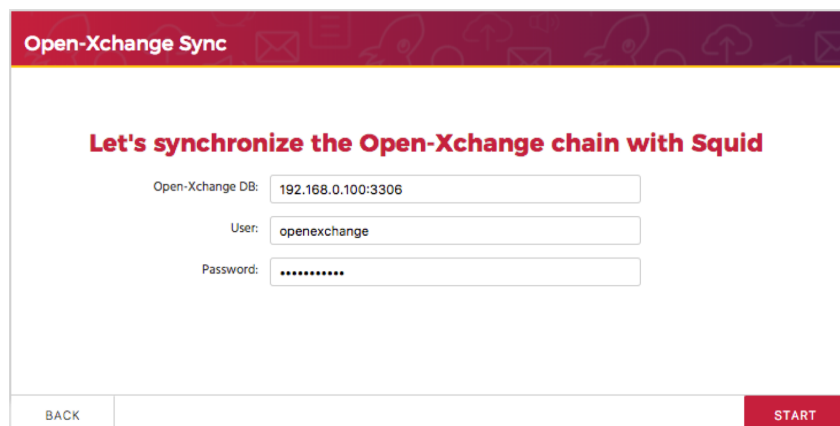
If there is a problem, an error will be displayed on screen with details. If not you will be redirected to the last page of the Configuration Wizard.

b. Synchronize with Open-Xchange Page

This section will be displayed only if you selected “No (import users)” at step 2: “Welcome Page”. In this section, you will need to provide Open-Xchange MySQL database credentials to sync accounts and users with Squid database.

Open-Xchange DB:	This field is used to set the IP address and TCP/IP port of the Open-Xchange MySQL database.
User:	This field is used to set the Open-Xchange MySQL Database’s admin username.
Password:	This field is used to set the Open-Xchange MySQL Database’s admin password.
Start Sync button:	This button is used to start the synchronization process between Open-Xchange Containers, Contexts and Resellers; and Squid database.

IMPORTANT NOTE: By default, Squid configures “Containers” and “Resellers” on Open-Xchange as “Valued Added Resellers” in Squid; and “Contexts” on Open-Xchange as “Enterprise Customers” in Squid.



Open-Xchange Sync

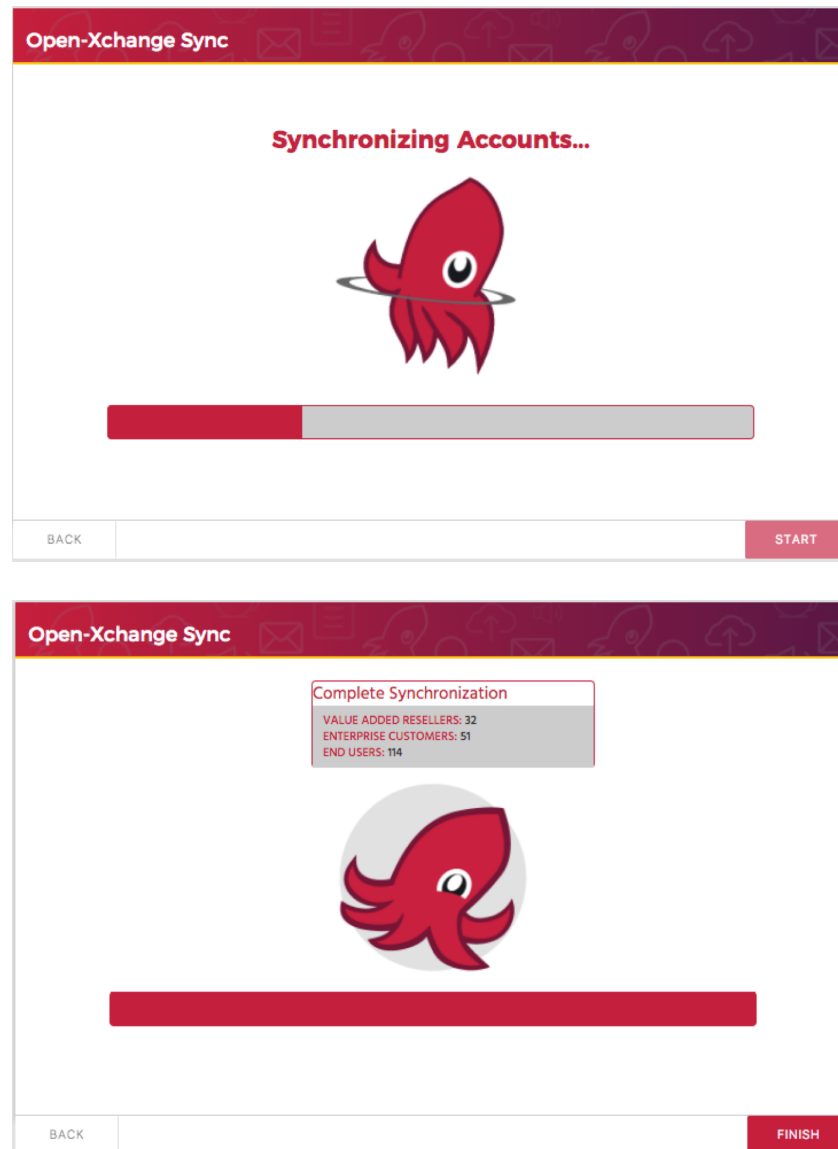
Let's synchronize the Open-Xchange chain with Squid

Open-Xchange DB: 192.168.0.100:3306

User: openexchange

Password: *****

BACK START



Once the Squid's synchronization process finishes, press **Finish**.

If there is a problem, an error will be displayed on screen with details. If not, you will be redirected to Success Page.

10. Success Page

Finally, a success message will be displayed and Squid will be ready to use.



Once you press **Go to Squid Administration Console** button, you will be redirected to Squid Administration Console Login Page.



Quick Start Operation Guide

- Introduction
- Starting Guide for Service provider
- Starting Guide for Value Added Resellers
- Starting Guide for Enterprise Customers

Introduction

This guide explains the steps to get started quickly with Squid, for further explanation about all the functionalities, definitions and depth knowledge about how to use Squid, please check the complete user's guide.

This guide assumes that Open-Xchange App Suite and Squid are installed and integrated. For detailed information about Squid's installation, please refer to the Squid's installation guide.

This guide is divided in 3 sections:

- Starting Guide for Service Provider
- Starting Guide for Value Added Resellers
- Starting Guide for Enterprise Customers

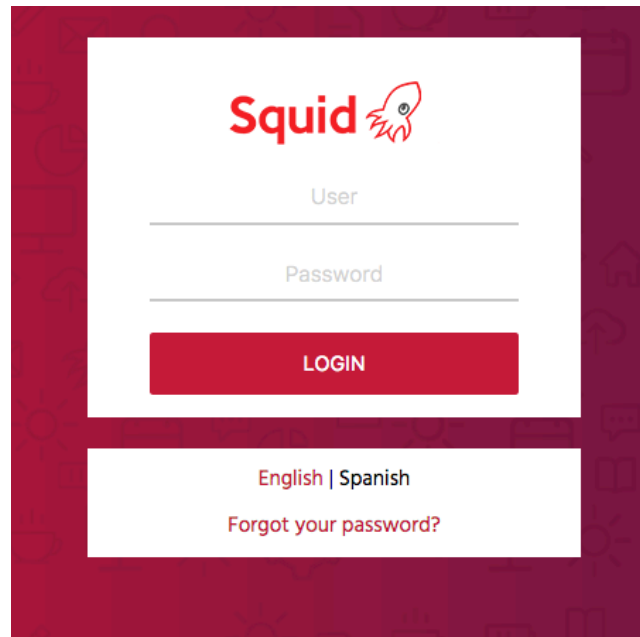
Following the steps listed on these 3 sections, Squid will be up and running and managing e-mail accounts on Open-Xchange App Suite platform.

Starting Guide for Service Provider

Service Provider is the first entity to start operating Squid, it needs to have in hand its manager's username and password, and the URL ([http://\[domain.com\]/Squid-Core/](http://[domain.com]/Squid-Core/)) of the Squid's web admin portal.

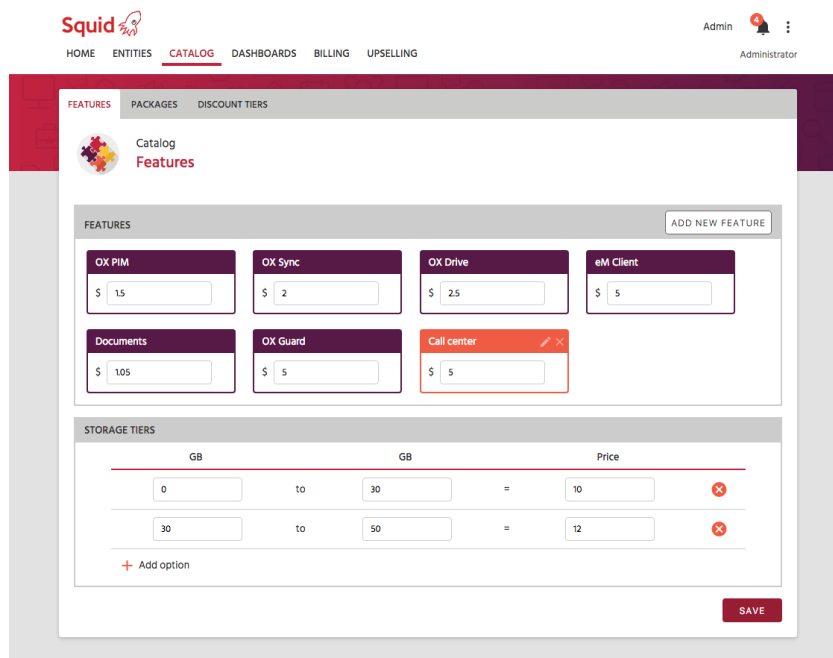
Steps for a quick start in Squid as a Service Provider are:

1. Login into Squid web interface.



The login interface for the Squid web interface. It features the Squid logo at the top, followed by input fields for 'User' and 'Password'. A red 'LOGIN' button is positioned below the password field. At the bottom, there are links for 'English | Spanish' and 'Forgot your password?'.

2. Go to Squid web admin portal Home -> Catalog -> Features.



The screenshot shows the 'Features' page in the Squid web admin portal. The top navigation bar includes 'HOME', 'ENTITIES', 'CATALOG', 'DASHBOARDS', 'BILLING', and 'UPSELLING'. The 'CATALOG' section is active, and the 'Features' sub-section is selected. The page displays a grid of feature cards with their respective prices. The 'Call center' card is highlighted in orange. Below the features, there is a 'STORAGE TIERS' section with a table for defining storage tiers.

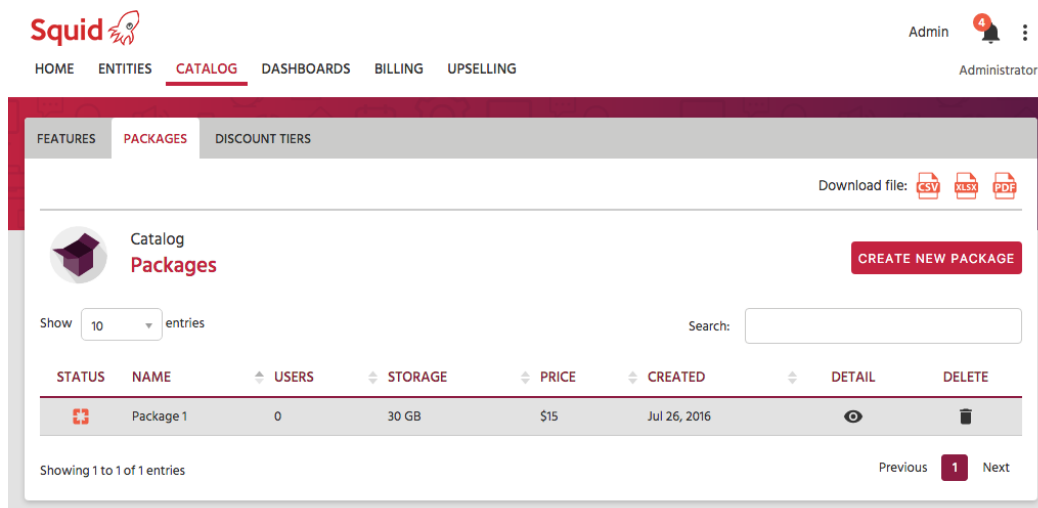
GB		GB		Price	
0	to	30	=	10	✗
30	to	50	=	12	✗

+ Add option

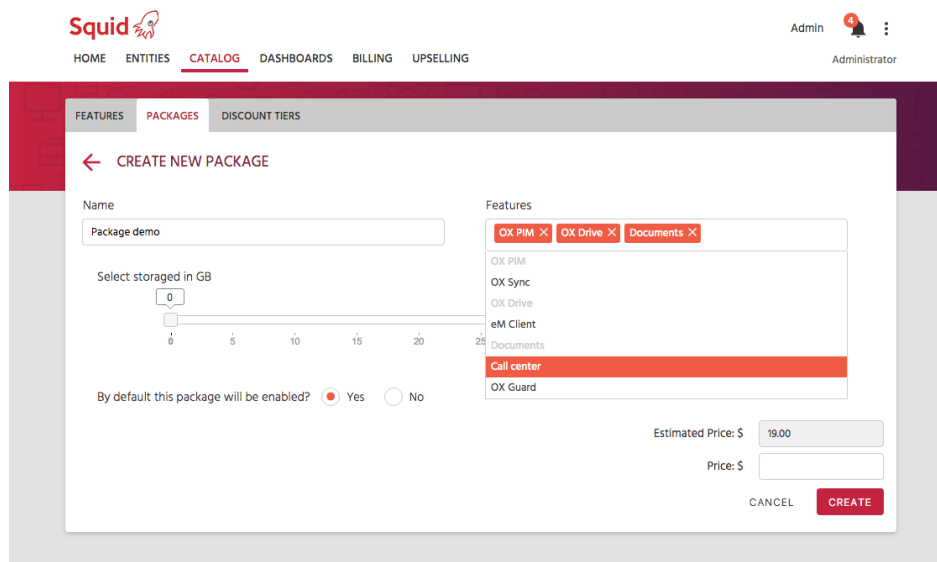
SAVE

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3. Set a default price for Open-Xchange features.
4. Add custom features as required, and set a price for each one (this step is not mandatory, so it can be skipped).
5. Create Storage Tiers and set prices for each Tier.
6. Go to Packages section (Home -> Catalog -> Packages).



7. Create at least one package with the PIM Open-Xchange feature (for further explanation about package creation, please refer to the user's guide).



- Go to Discount Groups (Home -> Catalog -> Discount Groups), and create one discount group with not less than one tier.

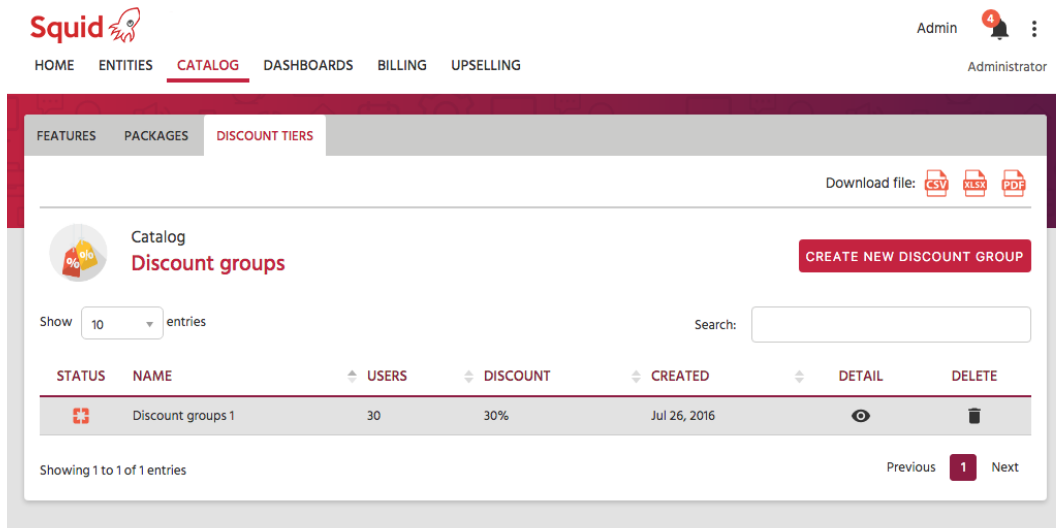


Figure 1 - Discount Groups Page.

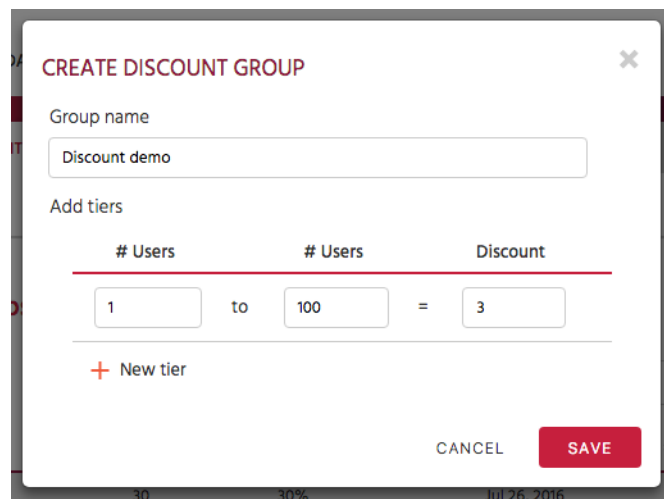


Figure 2 - Discount Group provisioning.

- The next step is to define a payment method for the Service Provider. This configuration is set in "Settings" (Home -> Configuration button -> Settings), and check at least the "Manual Payment" checkbox. Fill in the textbox below to set the message that will appear for manual payments for VARs, this message can contain instructions or even links to another web pages; for instance, here you can detail a Bank Account transfer option, as well as instructions for the VAR to prove that the payment was made.

PAYMENT OPTIONS

Select options

☒ Paypal

☒ Manual Payment

Paypal Configuration

Client ID

isc.payasyougo

Secret ID

Manual Payment

Please follow these instructions to activate your SquidOX Account.

Do a Bank wire transfer to the Account ID XXXX on Bank : YYYY

Scan the receipt and send it by email to xxx@domain.com

Once the payment is confirmed you'll receive an e-mail with the information to access SquidOX to start your self provisioning

Display Billing history up to

12

months.

- Next step is to define the Billing invoice template; where details about terms, conditions and messages will be used as default when creating invoices to all the VARs in the distribution network. Go to Home -> Billing -> Receipt Template. Configure the tags and fill in the appropriate text messages for each section (for a detailed explanation about each field please refer to the user's guide).

SquidOX

Admin Administrator

HOME ENTITIES CATALOG DASHBOARDS **BILLING** UPSELLING

INVOICE HISTORIC DATA MAIL ALERT **RECEIPT TEMPLATE**

Invoice
Receipt Template

TEMPLATE FORMAT

Receipt

<receipt_value>

Billing date: <billing_date>

Due date: <due_date>

Client details:

Bank payment details:

Quantity	Descriptor	Unit Price	Days charged	Extended Price
\$product_quantity	\$product_desc	\$product_unit	\$product_days	\$product_ext

Net total: \$net_total

Discount: \$discount

Total: \$purchase

Terms & Conditions

You can log in to your client area to view and pay your invoice. Visit our web page for complete payment instructions. If you do not have an account yet, please contact your account administrator: 'ADMIN_NAME'('ADMIN_MAIL'). Please note that by paying this invoice you confirm that you have read, understood and fully agreed to the General

VARIABLES

Click an option to add into your template.

My Data

NAME ALIAS

E-MAIL

Dependent Data

NAME ALIAS

E-MAIL TAX ID

CUSTOMER ID

Dates

BILLING DATE

CURRENT DATE

DUE DATE

Payment

PAYMENT TYPE

PAYMENT DETAILS

SAVE

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Figure 3 - Receipt Template.

- Next required step is to create the first VAR in the Squid distribution network. Go to Home -> Entities -> Value Added Resellers page and click on **Add new VAR button**.

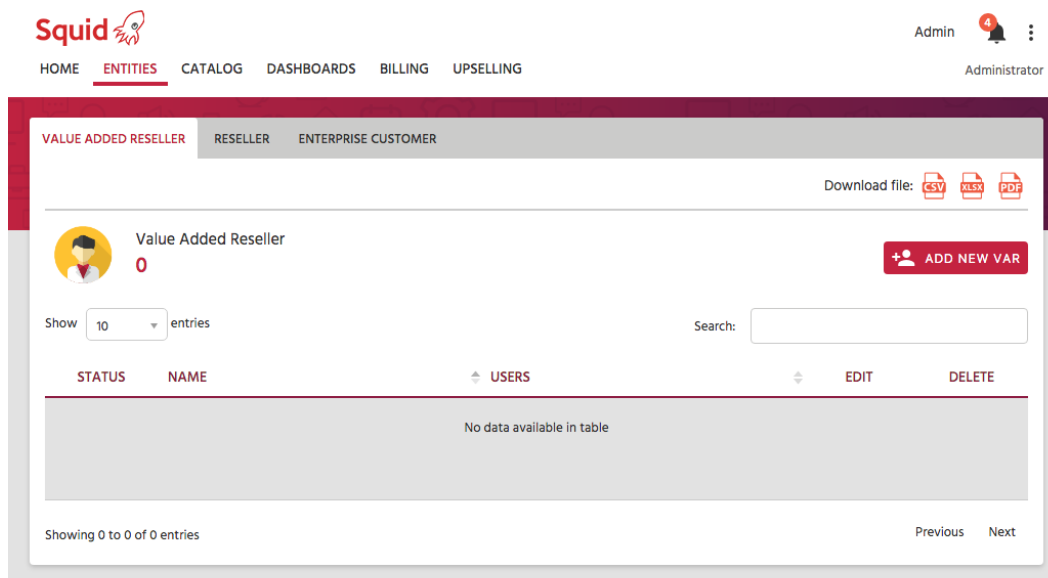


Figure 4 - Value Added Resellers Page.

12. Fill in all required fields (for detailed information about each field, please refer to the user's guide).

NOTES:

- All fields in this screen define the commercial behavior of the distribution network for that VAR.
- **Payment Details:** These fields (Discount Group, Due Day) define commercial rules for the VAR.
- **Payment Options:** These fields (billing type, payment type, payment methods) define the commercial scheme of the VAR.
- **License Management:** These fields define the package assignation to the VAR, used for invoices.
- **Permissions:** They are used to set permissions to extend the distribution network and allow them to create packages or features.

- **User Account:** Here it is defined the VAR access to the Squid web admin portal.

The screenshot shows the 'ADD NEW VALUE ADDED RESELLER' page in the Squid web admin portal. The page has a dark red header with the Squid logo and navigation links: HOME, ENTITIES, CATALOG, DASHBOARDS, BILLING, and UPSELLING. The user is logged in as 'Administrator'.

The form is organized into several sections:

- GENERAL INFO:** Includes fields for Name, Alias, Address, Country (dropdown), State (dropdown), City, Zip Code, Tax ID, E-mail, and Client ID.
- PAYMENT DETAILS:** Includes a Discount Group (dropdown), Due Date, API URL Access? (radio buttons for Yes/No), and API Cart Available? (radio buttons for Yes/No).
- PAYMENT OPTIONS:** Includes Billing type (dropdown), Payment type (dropdown), Select (dropdown), and Credit days (text input).
- LICENSES MANAGEMENT:** Includes Package (dropdown), Price (text input), Licenses (text input), and an Infinite checkbox.
- PERMISSIONS:** Divided into 'To create' and 'To modify' sections. 'To create' includes checkboxes for Value Added Reseller, Reseller, Packages, and New features. 'To modify' includes a checkbox for Web Interface Customization.
- USER ACCOUNT:** Includes User (text input), Password (text input), and a GENERATE button.

At the bottom right, there are CANCEL and SAVE buttons. A footer note at the bottom center reads: '2017 © All rights reserved | INSIGHTLEVEL'.

Figure 5 - Create new Value Added Reseller page.

- Now you are ready to operate as a Service Provider. There are a lot more tasks involved in the management, like defining profiles and permissions for users, analyzing dashboards and reports, or approving invoices for VARs; so please refer to the user's guide for further details.

Starting Guide for Value Added Resellers

VARs are the entities that can manage Resellers, Enterprise Customers and even another VARs under its distribution network in Squid.

Because VARs can be created on different commercial schemes, this starting guide shows the steps required to start operations for VARs on commercial schemes “Per Contract: Pre-payment and Post-payment”, these commercial schemes inherit the packages provided by the Service Provider.

Finally, and just to clarify, the 3rd commercial scheme is “Pay as you Go: Post-payment”. Basically, the steps are the same; but the main difference is that a VAR also needs to create packages (these steps are described on the Service Provider section of this guide).

The steps required to start operations as a Value Added Reseller are:

1. Login into the Squid web admin portal; VAR's manager will need the username and password created by the Service Provider, and the URL ([http://\[domain.com\]/Squid-Core/](http://[domain.com]/Squid-Core/)) also delivered by the Service Provider.
2. Go to Home -> Billing -> Receipt template. Here are set texts like terms and conditions, VAR's name, among others; this information will be used in the invoice delivered to Enterprise Customers. The steps required to modify the receipt template are the same described on the Service Provider section, so please refer to those steps.
3. The next step is to create the first Enterprise Customer in the VAR's distribution network. The VAR entity has assigned packages to be distributed to dependents on its distribution network, these packages were provided by the Service Provider, so go to Home -> Entities -> Enterprise Customer.

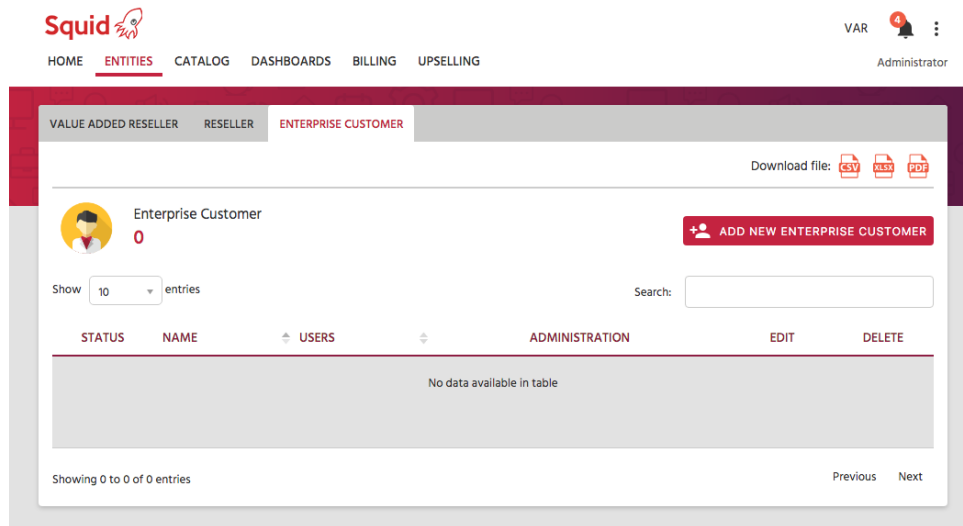


Figure 6 - Enterprise Customer's section page.

4. Click on **Add new Enterprise Customer button** to create the first Enterprise Customer in the distribution network.
5. On Enterprise Customer's page, fill in all the mandatory fields and click on **Save**.

Figure 7 - Enterprise Customer provisioning page.

PAYMENT METHOD

Method Credit days

PERMISSIONS

☐ Administrator support

USER ACCOUNT

User Password

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Figure 7 - Enterprise Customer provisioning page.

NOTES:

- License management section is used to assign the number of packages to the Enterprise Customer and set the price for each package. Basically, these prices are used in the Billing process; the number of packages means the number of users that can be provisioned on the Open-Xchange App Suite platform, and the functionalities available for each mailbox. (for further details, please refer to the user's guide).
 - Payment Method is used to allow the Enterprise Customer to configure its PayPal account for automatic charges.
 - Credit days are only available if the VAR is on "Per Contract: Post-payment" or "Pay as you Go: Post-payment" commercial schemes.
 - Enterprise Customers inherit the commercial scheme from its parent entity.
 - User account section is used to set the username and password for the Enterprise Customer to allow access to Squid web admin portal. This username is sent to the e-mail address set on "general info" section.
6. Once the Enterprise Customer is created, it is now ready to provision its e-mail user accounts. There are many other activities involved in managing the VAR, please refer to the user's guide for further details.

Starting Guide for Enterprise Customers

Enterprise Customers are the entities that can manage user's mailboxes in the Open-Xchange App Suite platform, among many other activities.

VARs and Resellers can also manage user's mailboxes using the "log in as" feature, provided in Squid web admin portal. For more information about how to use the "log in as" feature, please refer to the user's guide.

To start operations as an Enterprise Customer, follow these steps:

1. Log into Squid web admin portal with the right credentials and the URL ([http://\[domain.com\]/Squid-Core/](http://[domain.com]/Squid-Core/)) provided by the VAR.
2. Go to Entities → Users, to start provisioning users into the Open-Xchange App Suite platform.

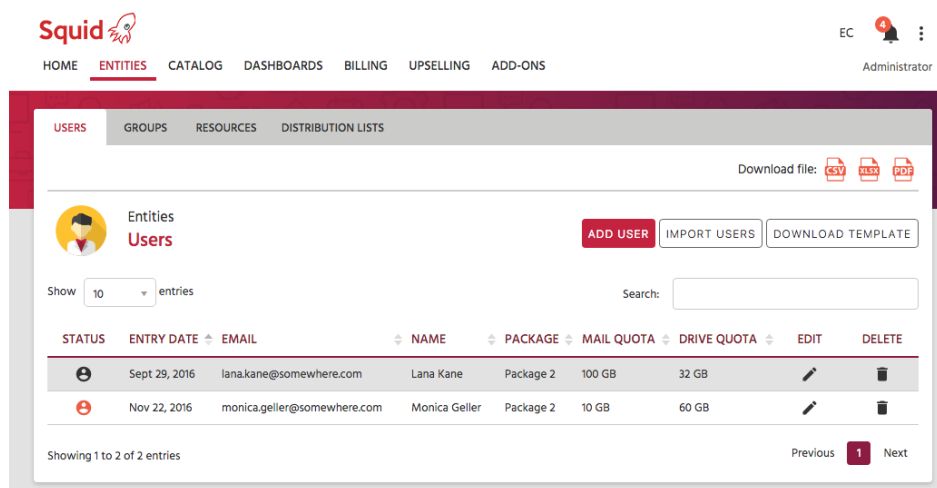


Figure 8 - Enterprise customer's user provision page.

3. Click on **Add User button** to provision the first user mailbox.
4. Fill in all the mandatory fields and click on **Save**.

CREATE NEW USER

Email @example.com

Password

First Name

Last Name

Package

Status ☒ Active ☐ Disabled

Alias

Groups

- ☐ Group Sales
- ☐ Group Marketing

Split aliases by comma

Storage

30% Mail 70% Drive

Figure 9 - Add new users page.

NOTES:

- Password field is randomly created by Squid, but the Enterprise Customer has the option to change it.
- Package field is used to assign a package to the user, keep in mind that “package” means functionality for Open-Xchange App Suite platform; so, depending on the package, the user will have access to Web Mail, Drive, Documents, Guard functionalities, among other features.
- “Storage bar” is used to distribute the storage assigned to the package between mailbox and drive; please refer to the user’s guide for further information.

Once the first mailbox is created, everything is ready for the user to access the Open-Xchange App Suite.

There are many more management options for an Enterprise Customers, please refer to the user's guide.



General Overview

- What is Squid?
- Squid's Entities
- Squid's Benefits
- Squid's Modules

What is Squid?

SP

VAR

RESELLER

EC

Squid is a Cloud software platform designed to control and build a business model based on the distribution and provisioning of digital services through a commercial distribution network composed by service providers, partners, distributors and/or fee finders. Squid provides an integration to third-party software such as Open-Xchange App suite platform and Postfix, to provision users into that third-party platforms.

Basically, Squid supports and manages daily-based business operations, for the sales process, these operations includes:

- Invoicing or billing
- Discounts for resellers
- Provisioning of Enterprise Customers
- Provisioning of digital services

Squid's Entities

SP

VAR

RESELLER

EC

In Squid, there are five main actors: Service Providers, Value Added Resellers, Resellers, Enterprise Customers and End Users.

Service Provider (SP): is the top-level hierarchy entity, it is the owner of the Open-Xchange platform and usually is the responsible for the services. This entity installs Squid and has full control over Valued Added Resellers, Resellers and Enterprise Customers provisioned on the Open-Xchange platform.

SP sets all basic commercial rules for package creation, prices, commission tiers, permissions to modify or view the different features in Squid.

SP has full access to a complete set of features in Squid; including, but not limited to:

- Manage VARs, Resellers and Enterprise Customers.
- Manage Packages and set permissions to all the VARs, Resellers and Enterprise Customers.
- Manage feature catalog of services for packages.
- Manage discount tiers for all the VARs / Resellers
- View the commercial behavior of sales (users, packages, revenues, VARs, Resellers and Enterprise Customers) through understandable and intuitive dashboards.
- Full access to billing receipts for VARs, Resellers and Enterprise Customers.
- Full Control over the commercial distribution network created on Squid.
- Provision different managers with multiple access profiles.
- Manage users, groups, resources, distribution lists and domain aliases for every EC.
- Configure integration settings for PayPal.
- Configure multiple billing templates.
- Configure multiple mail notification templates.
- Configure specific and cross information scheduled reports.
- Use full API functions for the operations permitted in Squid.

Value Added Reseller (VAR): Usually known as partner or distributor; is an entity that acts as a business partner of a service provider and can provide valued added services for the Open-Xchange environment. VARs are usually enforced invoice and offer technical and commercial support assistance to their Enterprise Customers.

Under their distribution network, a VAR is able to manage:

- Other VARs, Resellers and Enterprise Customers.

- Changes on their distribution network (for instance, move ECs from one Reseller to another, or from one VAR to another).
- Multiple prices for Open-Xchange features and third-party products, or services in packages.
- Discount tiers for their Resellers or other VAR.
- E-mail templates for payment notifications.
- Scheduled custom reports.
- Billing Cash In and Cash Out operations.
- Upselling transactions from their VARs or Enterprise Customers.
- Customization of the Squid interface.
- Other managers with different profiles and functions under his distribution chain.
- Users, groups, resources, distribution lists, domain aliases for every one of their Enterprise Customers.

VARs can also use the Squid's API if they prefer to use their own front-ends or billing systems.

Reseller (R): It is an entity that works as a sales agent or a fee finder for a Service Provider or Value Added Reseller. It doesn't add value added services or products and usually doesn't invoice to End Users or Enterprise Customers. On Squid, a Reseller can:

- Register new Enterprise Customers under his distribution network.
- Manage custom reports and dashboards about users, revenue and packages related only to their Enterprise Customers provisioned under their distribution network.

Enterprise Customers (EC): Is an organization and usually owns an internet domain (small business or big enterprises). EC users usually collaborate using Open-Xchange and Squid platform, this is the entity that consume the service based on Open-Xchange App Suite platform.

An Enterprise Customer usually contacts a Reseller or a Value Added Reseller to contract services for the Open-Xchange App Suite.

In Squid, an Enterprise Customer usually performs the following tasks:

- Manages Users, Groups, Resources in Open-Xchange.
- Manages Domain Aliases and Distribution Lists.
- Provisions other managers.
- Manages Upselling offers.
- Customizes their access to Squid portal.
- View billing reports.
- View dashboards with information about users and packages.

End Users: A user that uses the Open-Xchange platform services in a stand-alone way, meaning it will not use collaboration tools. An End User usually has direct contact with Resellers, VARs or Service Providers to contract communication services. Usually, this entity doesn't have an own internet domain and uses the internet domain provided by the Reseller, VAR or Service Provider.

Squid's Benefits

SP

VAR

RESELLER

EC

Squid has benefits for all actors that participate on a commercial distribution model in order to distribute Open-Xchange App Suite services; which benefits Service Providers, Value Added Resellers, Resellers and Enterprise Customers.

Benefits for Service Providers:

- Allows managing/building a sustainable commercial distribution business model based on Open-Xchange Collaboration Services.
- Allows measuring the business behavior through time and provides useful information to make decisions.
- Allows managing business relationships between:
 - Service Providers <-> Value Added Resellers <-> Resellers <-> Enterprise Customers.
 - Value Added Resellers <-> Resellers <-> Enterprise Customers.
 - Value Added Resellers <-> Enterprise Customers.
- Helps improve and automatize billing and provisioning processes for Value Added Resellers and Enterprise Customers.
- Generates income based on demand services requested by Enterprise Customers.
- Provides total control of products and services that will be delivered to customers in the entire commercial distribution model.
- Has built-in commercial models like: "Pay as you go" or "Pay per contract" for the entire distribution network.

Benefits for VARs:

- Helps Value Added Resellers to increase revenue based on commission schemas for Resellers or other Value Added Resellers.
- Allows Value Added Resellers to create new services without a big investment.
- Provides total control of their own distribution network.
- Provides tools to automate the billing process.
- Provides a powerful API to integrate external Web portals.

- Provides control for the up-rise prices of the services provided by the Service Provider and allows to add or create custom service packages.
- Provides a user-friendly web interface for provisioning users, groups, resources, domain aliases, distribution lists for the Open-Xchange Collaboration Platform.
- Provides a friendly interface for billing operations and notifications.
- Provides understandable dashboards to review behavior over time about the distribution chain based on users, packages, revenues, Value Added Resellers and Resellers.

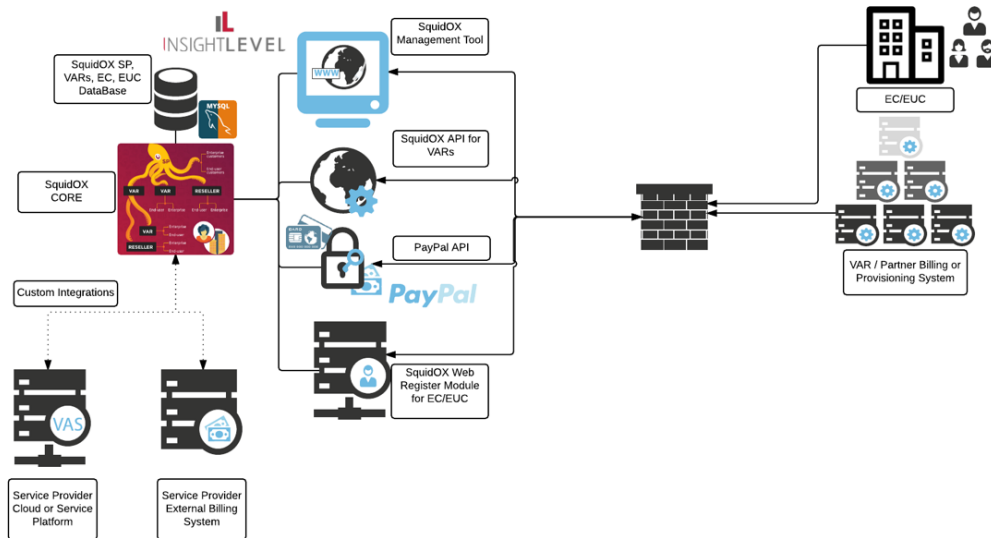
Benefits for Resellers:

- Provides a user-friendly interface that improves and manages sales processes.
- Provides total control over customers that belong to their distribution network.
- Provides understandable dashboards to review behavior over time about users, revenue and packages for their distribution network.

Benefits for Enterprise Customers:

- Provides a user-friendly web management tool in a self-service way, so the Enterprise user can provision users, groups, resources and distribution lists.
- Provides a user-friendly web interface that allows to control the packages assigned to End Users and the packages available to be assigned.
- Provides functions to request more services directly to the Value Added Resellers.
- Provides secure payment methods.
- Provides savings in time and money for the provisioning of collaboration services to new the employees in the Enterprise.

Squid's Modules



Squid has the following modules:

- **Squid Web Management Tool for SPs, VARs, Resellers y ECs:** It is the main web interface and allows managing the complete cycle for selling, distributing and provisioning services based on Open-Xchange platform
- **Squid API:** It is a powerful API for VARs (Service Provider's partners) to allow them use all Squid functions.
- **Connector to PayPal:** This is an out-of-the-box Squid plugin to manage automatic charges using paypal accounts.
- **Connector to OXaaS API:** This is an out-of-the-box Squid plugin to manage: containers, contexts, users, groups, resources and different options into the Open-Xchange App Suite.

- **Connector to Postfix:** This is an out-of-the-box Squid plugin to manage: e-mail distribution lists.
- **Web Registration Page for ECs:** It's a dedicated mini market place for every VAR or Reseller that allows to distribute Open-Xchange packages through web link delivered to their customers for a self-service registration process.



Login

- Login
- Forgot password
- Language selection
- Logout

Login



Login Page is common for all entities in the distribution network. Same login page is used by Service Providers, Value Added Resellers, Resellers and Enterprise Customer managers.

In order to access Squid it is required to have a manager account and the Squid URL web portal. For instance: [http://\[domain\]/Squid-Core/login](http://[domain]/Squid-Core/login). Domain corresponds to Squid host, i.e. www.mydomain.com.

Squid

Username

Password

LOGIN

English | Spanish

Forgot your password?

Figure 1 - Squid main login page.

Login Page has the following attributes:

- **Login icon:** Shows Squid icon.
- *** Username:** This field is used for username.

- *** Password:** This field is used for password.
- **Login button:** On click action, it will allow access to Squid home screen.
- **Language selection:** These options allow the user to select languages, which could be “English” or “Spanish”. English is the default language.
- **Forgot your password:** Redirects to a “Forgot Password” page.

NOTES:

- It's highly recommended to protect Squid URL with a SSL certificate in order to maintain a secure communication.
- Username and password fields are limited to use only alphanumeric characters and symbols as “_”, “@” and “.”.
- Squid Login form will show an error if either the username or password is invalid or doesn't exist.
- Fields with “*” are mandatory.

Forgot password

SP

VAR

RESELLER

EC

This feature allows restoring a valid manager password in Squid. It will send an e-mail with a URL to set a new password for the manager's account. Then, the new password is sent to the registered e-mail. **This feature is common for all entities' managers in the entire distribution network in Squid.**

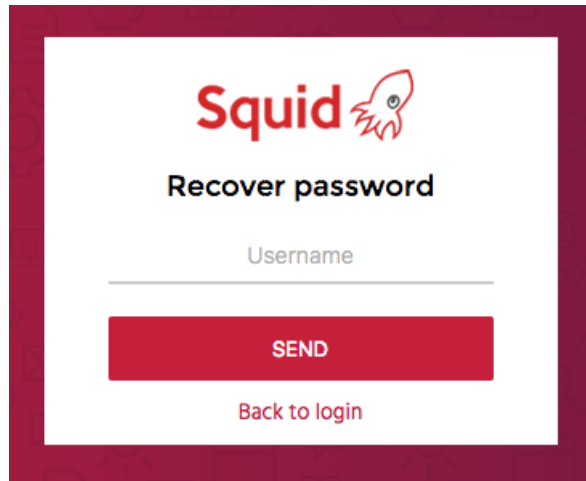


Figure 2 - Squid's forgot password page.

Forgot password page has the following attributes:

- **Username:** This field allows adding the username for a manager account.
- **Send button:** Button to send the request to restore password.
- **Go to Login link:** Link to "Login" page.

Steps to recover a manager password are described below:

1. Click on the link, the user will be redirected to the Forgot Password Page.
2. Enter the username, which is required to recover the password.
3. Click on the **Send button**.
4. The status of the action is shown, for security reasons Squid will only display a confirmation action message. If the user is valid, he will receive a notification with instructions to reset his password on his registered mailbox.

Language selection



This feature switches the language of the Squid portal. The available languages are English and Spanish. This selection can be changed in Regional Settings functionality as well. This functionality is common for all entities' managers in the entire distribution network in Squid.

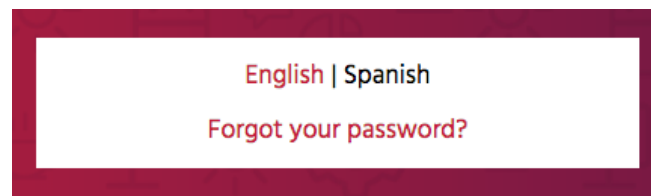


Figure 3 - Squid's login Page language selection option.

When the user has been logged in and is able to access Squid main interface, he will have access to the following sections.

Logout



This section allows users to close the current session on Squid. In order to access this section, it is mandatory to follow the next path: Home Page -> Header Section -> More icon -> Logout. By pressing the Logout button the current session will be closed and Squid will redirect the user to the Login page. This functionality is common for all entities' managers in the entire distribution network in Squid.

NOTES:

- Squid will allow a control session per user, meaning that an account can only have one active session on Squid web admin portal.
- Squid also handles session time-out per user. So, if a user loses connection to Squid web admin portal, the user will not be allowed to access again until the session time-out expires.



Home

- Home
- Month Overview Dashboard
- Activity Log
- View Entities Network

Home

SP

VAR

RESELLER

EC

Home page is the first page in Squid web admin portal. After login, on the main screen, the entity (SP, VAR, Reseller and Enterprise Customers) can view the general behavior of the distribution network, the last changes made by their managers in their distribution network (the activity log). Depending on the permissions assigned by a parent entity, it will see the complete menu options. Finally, the entity will also have access to the configuration settings menu, notifications menu, and the view of his current username. In order to access this section, follow the next path: Home Page.

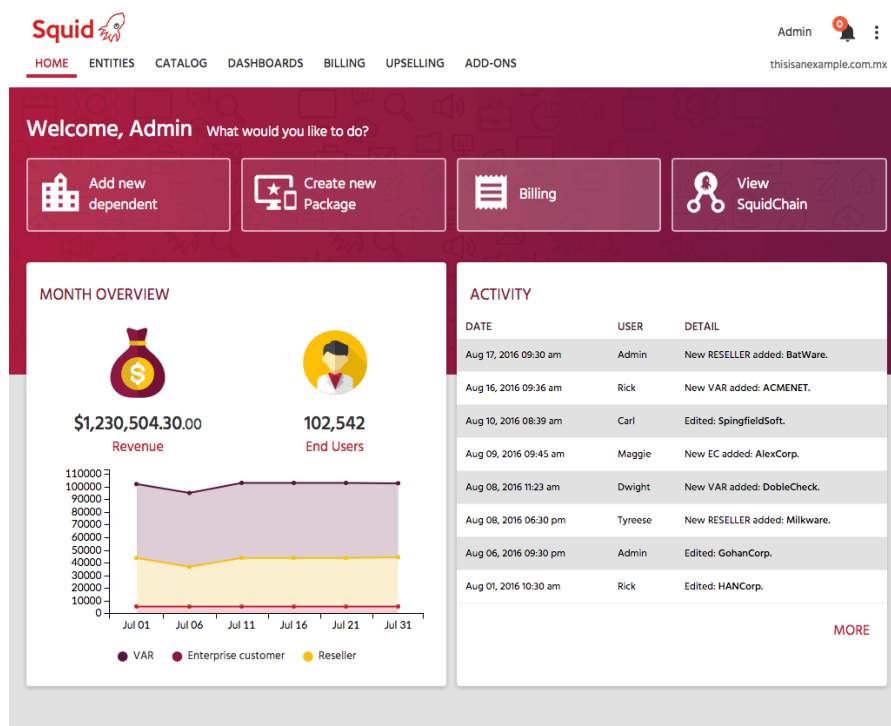


Figure 1 - Squid's Home Page, main screen on login.

Month Overview Dashboard

SP

VAR

RESELLER

EC

This sub-section shows month overview indicators about revenue and end-users from all VARs, Resellers and or Enterprise Customers on their distribution network.

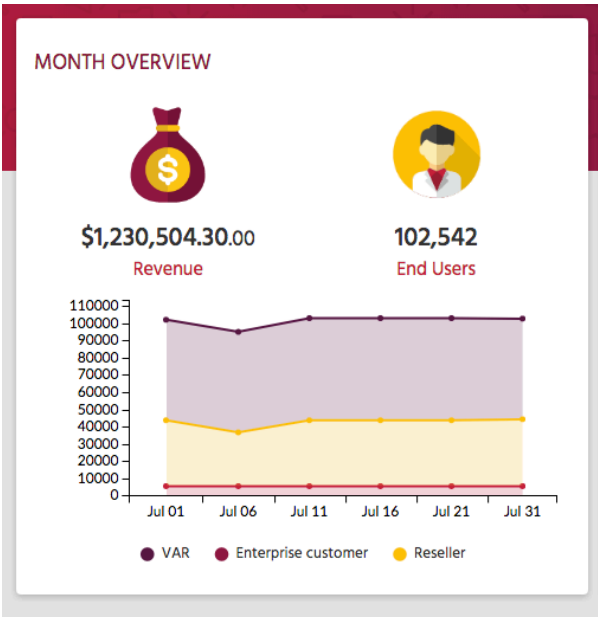


Figure 2 - Squid Home – Month Overview.

Month Overview Dashboard has the following attributes:

Revenue:	Shows the behavior of the last 30 days about the revenue of the entity’s distribution network.
End-Users:	Shows the behavior of the last 30 days about the end-users provisioned on Squid and Open-Xchange Platforms on the entity’s distribution network.

Linear chart:

This chart shows the behavior of the last 30 days about the users that were provisioned in the Open-Xchange platform on the entity's distribution network.

NOTES: The SP entity can only view VAR's behaviors because it's only allowed to create 2nd level VARs under its distribution network. A VAR entity can see dependents that belong to their distribution network like another VAR, a Reseller or an Enterprise Customer, there is no shared information between VARs that belong to a different distribution network.

This section will have different behavior depending the entity logged in, so in case of an Enterprise Customers, it will only show the End Users metrics.

Activity Log

SP

VAR

RESELLER

EC

This section shows a binnacle of activity done by the managers provisioned by the entity.

ACTIVITY		
DATE	USER	DETAIL
Aug 17, 2016 09:30 am	Admin	New RESELLER added: BatWare.
Aug 16, 2016 09:36 am	Rick	New VAR added: ACMENET.
Aug 10, 2016 08:39 am	Carl	Edited: SpringfieldSoft.
Aug 09, 2016 09:45 am	Maggie	New EC added: AlexCorp.
Aug 08, 2016 11:23 am	Dwight	New VAR added: DobleCheck.
Aug 08, 2016 06:30 pm	Tyreese	New RESELLER added: Milkware.
Aug 06, 2016 09:30 pm	Admin	Edited: GohanCorp.
Aug 01, 2016 10:30 am	Rick	Edited: HANCorp.
MORE		

Figure 3 - Squid Home – Activity Log.

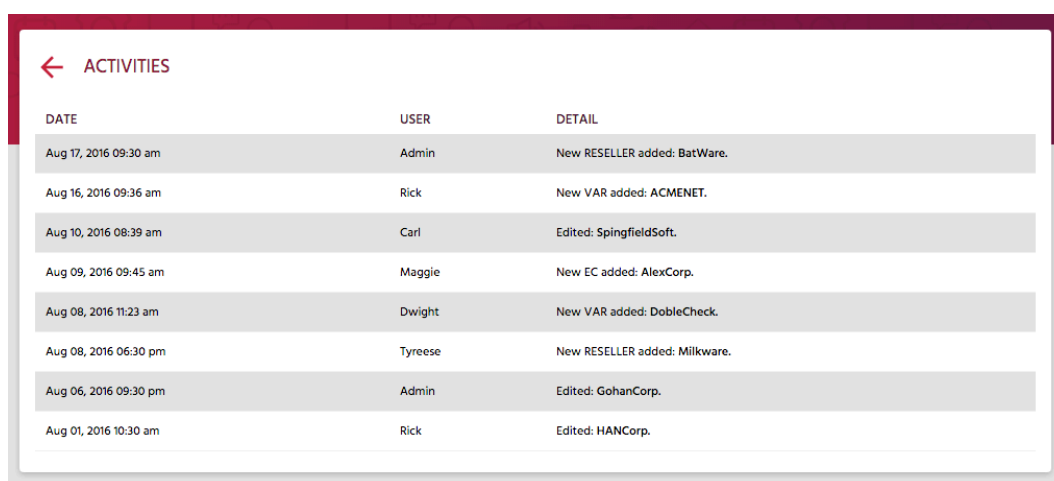
Activity Log has the following attributes:

Activity: This table shows the last 8 activities done by the managers of the entity.

More: [Link to the activity log detail page](#), where historic records can be viewed for audit purposes.

Audit records include success and failed operations for:

- Provision, delete, enable or disable VARs, Resellers, Enterprise Customers, users, groups, resources, distribution lists, domain aliases, managers, packages, discount groups, configuration settings, scheduled reports, scheduled notifications, template modifications.
- Login access.
- Changes in passwords, regional settings.
- Locked users.



The screenshot shows a web interface titled "ACTIVITIES" with a back arrow icon. Below the title is a table with three columns: DATE, USER, and DETAIL. The table contains eight rows of activity logs, alternating between light gray and white background colors. The activities include adding new resellers, VARs, and enterprise customers, as well as editing existing ones.

DATE	USER	DETAIL
Aug 17, 2016 09:30 am	Admin	New RESELLER added: BatWare.
Aug 16, 2016 09:36 am	Rick	New VAR added: ACMENET.
Aug 10, 2016 08:39 am	Carl	Edited: SpringfieldSoft.
Aug 09, 2016 09:45 am	Maggie	New EC added: AlexCorp.
Aug 08, 2016 11:23 am	Dwight	New VAR added: DobleCheck.
Aug 08, 2016 06:30 pm	Tyreese	New RESELLER added: Milkware.
Aug 06, 2016 09:30 pm	Admin	Edited: GohanCorp.
Aug 01, 2016 10:30 am	Rick	Edited: HANCorp.

Figure 4 - Squid Home – Activity Log Details.

View Entities Network

SP

VAR

RESELLER

This button allows the entity to view the entire distribution network in a hierarchy tree format. In order to access this section, follow the next path: Home Page -> Distribution Network.

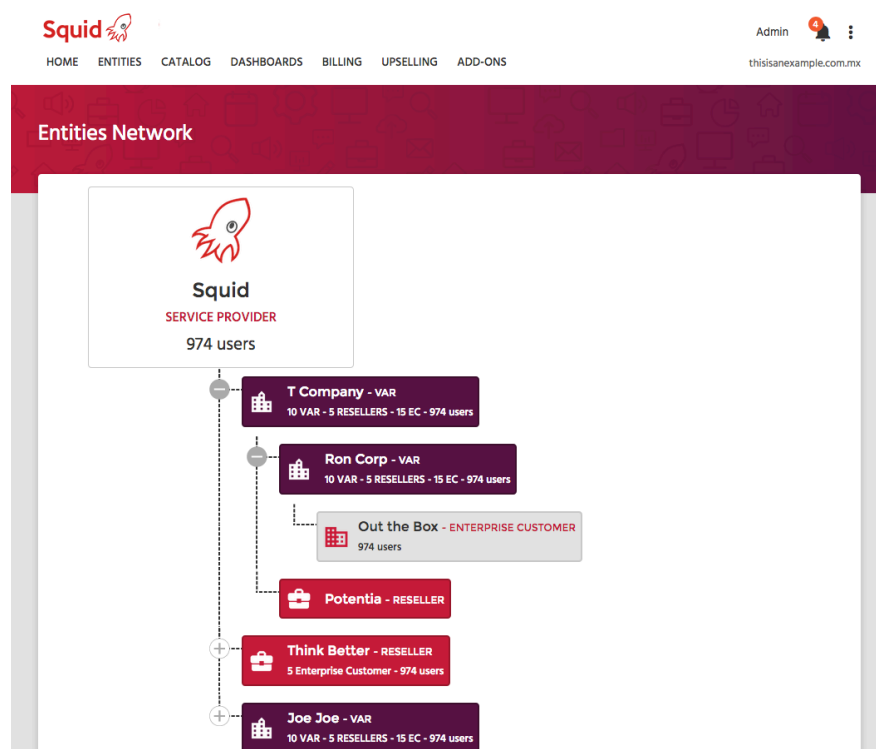


Figure 5 - Squid Home – View Entities Network Page.

NOTES: Use the mouse to move along tree.



Profile

Profile

SP

VAR

RESELLER

EC

This section shows information about the entity user account. This section allows a user to modify his own password. This functionality is common for all entities' managers in the entire distribution network in Squid.

In order to access this section, the next path must be followed: Home Page -> Header Section -> More icon -> Profile option

The screenshot displays the 'Profile' section for 'admin.provider'. It features a header with a profile icon and the text 'Profile admin.provider'. Below this, there are two main sections: 'GENERAL INFO' and 'CHANGE PASSWORD'. The 'GENERAL INFO' section contains three input fields: 'Name' (pre-filled with 'Service Provider'), 'Last name' (pre-filled with 'Administrator'), and 'Email' (pre-filled with 'alejandro.flores@insightlevel.com'). A red 'SAVE' button is located at the bottom right of this section. The 'CHANGE PASSWORD' section contains two input fields: 'Password' and 'Confirm password'. A red 'CHANGE PASSWORD' button is located at the bottom right of this section.

Figure 1 - Squid's profile section.

Profile page has the following attributes:

- **General info section:** Shows general information related to the user account.
- **Name:** This field allows changing the manager account name.
- **Last name:** This field Allows changing the alias for the account name.
- **Alternative e-mail field:** This field allows changing the manager account e-mail, you should be aware that this e-mail address will receive notifications related to change password feature.
- **Save button:** On click action, it will save changes in Squid.

- **Change password section:** This section will allow users to change their password.
- **Password:** This field allows users to set a new account password.
- **Confirm password:** This field allows users to set and confirm a new account password.
- **Change password:** This button is used to save and set the new account password.

NOTES:

- Password fields are limited only to alphanumeric characters and symbols as “_”, “@” and “.”.
- E-mail field has a validation to contain at least “.” and “@” symbols on the input data, but it doesn't validate the authenticity or existence of the domain.



Settings

- Settings
- Configuration
- Managers
- Roles
- Web Interface Customization
- License
- Resource

Settings

SP

VAR

RESELLER

EC

This section allows to view or modify the Squid's main configurations. This feature shows multiple settings depending on the entity manager logged in, meaning the setting menu will be different for Service Providers, Value Added Resellers, Resellers and Enterprise Customers.

Settings section has other sub-sections like Configuration, Managers, Web Interface Customization, License and Resource, which will be explained in further sections.

In order to access the settings section, the next path must be followed: Home Page -> Header Section -> More icon -> Settings section.

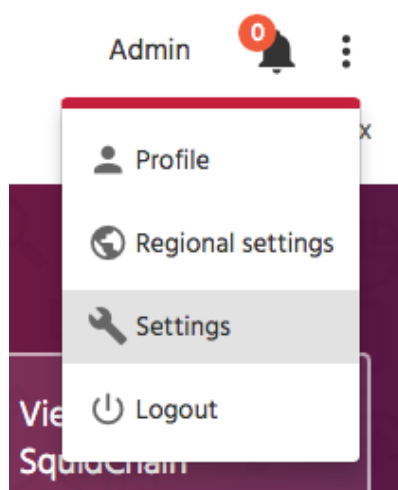


Figure 1 - Squid settings section.

Configuration

SP

VAR

This sub-section allows to view or modify the Squid's main configuration. This section is available only for Service Providers and VARs entity's managers. This section has the following options: General Info, Postfix, Payment Options and Upselling.

In order to access this section, follow the next path: Home Page -> Header Section -> More icon -> Settings-> Configuration.

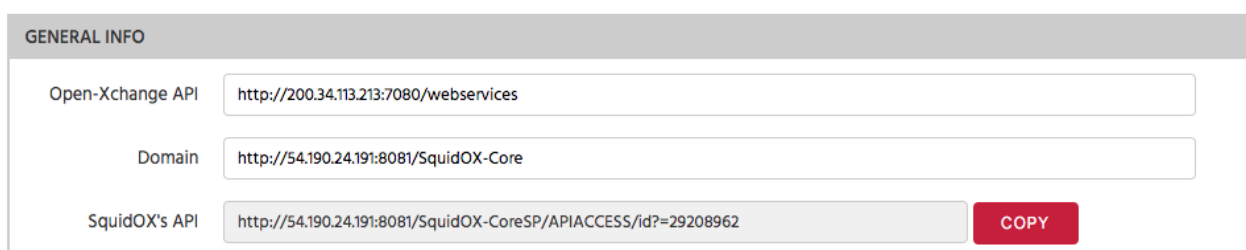
The screenshot displays the 'Squid Configuration' page within the 'serviceprovider administration console'. The page is divided into several sections for configuration:

- GENERAL INFO:** Contains fields for 'Open-Xchange API' (http://200.34.113.128/webservices), 'Domain' (http://54.190.24.191:8081/Squid-Core), and 'SquidOX's API' (http://54.190.24.191:8081/SquidOX-CoreSP/APIACCESS/dt=29208962) with a 'COPY' button.
- POSTFIX OPTIONS:** Includes 'SSH User' (ctiadmin), 'Server' (200.34.113.193), 'Password' (masked with dots), and 'Path' (/etc/postfix-in).
- PAYMENT OPTIONS:** Features 'Select options' with checkboxes for 'PayPal' and 'Manual payment'. Below, there are fields for 'PayPal's Client ID' and 'PayPal's Secret ID'. A section for 'Manual payment details' is also present.
- UPSSELLING WIDGET OPTIONS:** Includes 'Server' (200.34.113.128), 'SSH User' (ctiadmin2), 'Password' (cti123), and 'Open-Xchange folder' (/opt/open-xchange).

A 'SAVE CONFIGURATION' button is located at the bottom right of the configuration area. The footer of the page reads '2017 © All rights reserved | INSIGHTLEVEL'.

Figure 2 - Squid settings configuration sub-section.

General Info: This section will allow setting Squid's configuration to connect to Open-Xchange API and MTA Server (Postfix).



GENERAL INFO	
Open-Xchange API	<input type="text" value="http://200.34.113.213:7080/webservices"/>
Domain	<input type="text" value="http://54.190.24.191:8081/SquidOX-Core"/>
SquidOX's API	<input type="text" value="http://54.190.24.191:8081/SquidOX-CoreSP/APIACCESS/id?=29208962"/> COPY

Figure 3 - Configuration Page – General Info.

API URL for Open-Xchange: This field will allow setting the Open-Xchange URL's API, this field must be entered in the URL format i.e. `http://[domain]/[path]`.

Domain: This field is used to configure where the Squid admin portal should be listening for request, this field must be entered in the URL format i.e. `http://[domain]/[path]`.

API: This is a read-only field and will show the URL where the Squid API is available to third parties or external interfaces.

Copy button: On click action, this button will copy Squid API URL to the clipboard.

Postfix section: This section will allow configuring settings for the Squid integration to Postfix. So, for every Postfix server needed, Squid will show as many postfix's subsections as required.

POSTFIX OPTIONS

SSH
User:

citiadmin

Server:

200.34.113.193

Password:

Path:

/etc/postfix-in

Figure 4 - Configuration Page – Postfix.

User:	This field is used to set the secure shell’s username for the server where postfix is installed.
Password:	This field is used to set the password for secure shell’s username to access to Postfix Server.
IP:	IP Address of the Postfix Server, the address must be entered as an IP Address V4. i.e. 192.168.1.2.
Path:	This field is used to locate the postfix configuration files and must be entered in an Unix Filesystem format, i.e. /path/to/config-files/.

NOTES:

- The username used to access postfix server must have enough privileges to read and write files in the operating system.
- Because Squid uses Postfix’s main configuration file to manage distribution lists (this means add or delete users on a distribution list), Squid will take the configuration file and add, in the distribution lists section, the configuration required to allow Postfix processes the distribution list features configured through Squid web admin portal.

- General Info and Postfix Configuration are options only available for the Service Provider entity's manager.

Payment Options Sub-section: In this section the payment methods supported by Squid are configured, so depending on the selected options, the corresponding fields will be shown in order to be filled. It is mandatory to select at least one payment method.

The figure displays two states of the 'PAYMENT OPTIONS' configuration form. In the first state, the 'Paypal' checkbox is checked, revealing fields for 'Client ID' (containing '457257343') and 'Client secret ID' (containing '8346374FE2'). In the second state, the 'Other' checkbox is checked, revealing a large text area for 'Bank information for transactions'. Both states include a 'Display Billing history up to' field set to '10' months.

Figure 5 - Configuration Page – Payment Options.

PayPal checkbox: Check to enable/disable PayPal payment method.

Client ID: This field is used to add Client ID information from your PayPal Rest app account.

Secret ID:	This field is used to add the Secret ID from your PayPal Rest app account.
Other checkbox:	Check to enable/disable other payment method, this method is known as the manual method in Squid, this means that all the payment invoices must be checked manually as 'paid' on the Squid billing interface.
Other payment:	This field is usually used to add bank account information for transactions or any relevant information about the manual payment.
Display Billing history:	This field is used to change the time (in months) of the account billing history for all VARs, Resellers and Enterprise Customers in the platform.

Upselling sub-section: This sub-section allows to configure an Upselling integrated widget into the Open-Xchange App Suite Portal. The Upselling widget offers a feature towards End Users (users of the Open-Xchange app suite mail boxes) to request an account upgrade to their Enterprise Administrator in Squid. Thus, the Enterprise Administrator will approve or reject the request; if it is approved, the End User will be changed to a new package option with the new features.

UPSELLING

Server

192.168.3.200

User

oxUser

Password

oxuser.123

OX Folder

/opt/open-xchange

Figure 6 - Configuration Page – Upselling.

Server:	In this field the IP Address of the Open-Xchange server is set, the IP Address must have an IP Address V4 format, i.e. 192.168.1.2.
User:	This field is used to set the secure shell's (SSH) username to access Open-Xchange server.
Password:	This field is used to set the secure shell's (SSH) password to access Open-Xchange server.
OX Folder:	This field is used to set the path of the Open-Xchange folder to install Squid Upselling Widget.

NOTES: The username used to install the widget must have enough privileges to access, read and write files in the operating system.

Package registration (Reseller WebStore): This section is only available for VARs and Resellers. It is used to configure packages that will be shown in the VAR or Reseller self-service registration portal. The self-service registration portal is a module that allows a VAR or Reseller to use a mini-web store included in Squid, which can be used by Enterprise Customers to find offers about the packages, make purchases and self-register into the entity's distribution network.

PACKAGE REGISTRATION FOR RESELLER WEB STORE

Package Price Licenses ☐ Infinite

[+ Add option](#)

Payment method

RESELLER API URL Link

Figure 7 - Configuration Page – Package registration for Reseller Web Store.

Package:	This drop-down box allows to select the packages that will be shown on the mini-web store self-registration portal.
Price:	This field allows setting the price for each package that will be displayed on the mini-web store self-registration portal.
Add Option:	Button icon used to add more packages to the offer in the mini-web store self-registration portal.
Payment Method:	This drop-down box is used to choose the default payment method that will be used by the self-registered enterprise customers.
Self-registration portal URL Link:	This is a link that is distributed by the VAR or Reseller to his Enterprise Customers to allow self-registration, this link will add the self-registered Enterprise Customer on the VAR or Reseller distribution network.

NOTES: In order to use the mini-web store self-registration portal, it is required to define other payment details or the Paypal account settings for the VAR entity in Configurations settings.

Finally, at the end of the page, we will find the **Save Configuration** button that will allow us to save the current configuration on this page. A success status window must be shown if all configuration is right, otherwise an error status window will be shown.

Managers

SP

VAR

RESELLER

EC

This sub-section will allow to view, create, modify or delete managers of a current entity. This functionality is common for all entities' managers in the entire distribution network in Squid. In order to access this section, the next path must be followed: Home Page -> Header Section -> More icon -> Settings -> Managers.

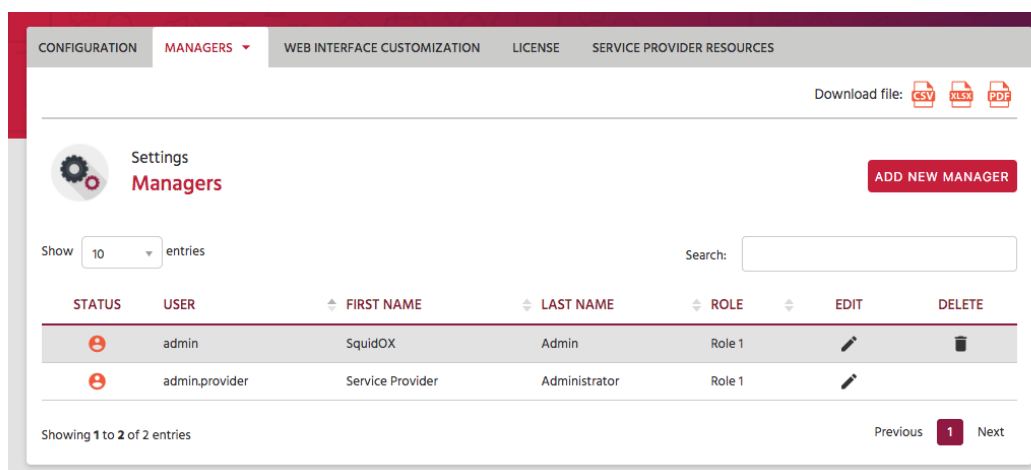


Figure 8 - Squid Settings – Managers List.

Managers section has the following attributes:

Managers table:

This table shows all the managers of the entity.

Add New Manager:

This button is used to create a new manager for the entity.

Download icon:

On click action, it will allow the user to export the complete information shown in the table above. The supported formats are: CSV, XLSX & PDF.

Show list:	This drop-down list is used to select the number of entries to show in the managers table.
Search:	This field is used to search an element in the managers table, the search feature will work as the user sets information on it.
Pagination:	These buttons (Previous and Next) are used to change the page and display more records.
Edit button:	This icon button is used to edit an existing manager.
Delete button:	This icon button is used to remove an existing manager.
Suspend/Activate manager:	This icon button is used to suspend or reactivate an existing manager.

Create a New Manager:

This functionality is located on the manager's sub-section and is used to create a new manager account for the current entity. Each entity on the distribution network can create its own managers.

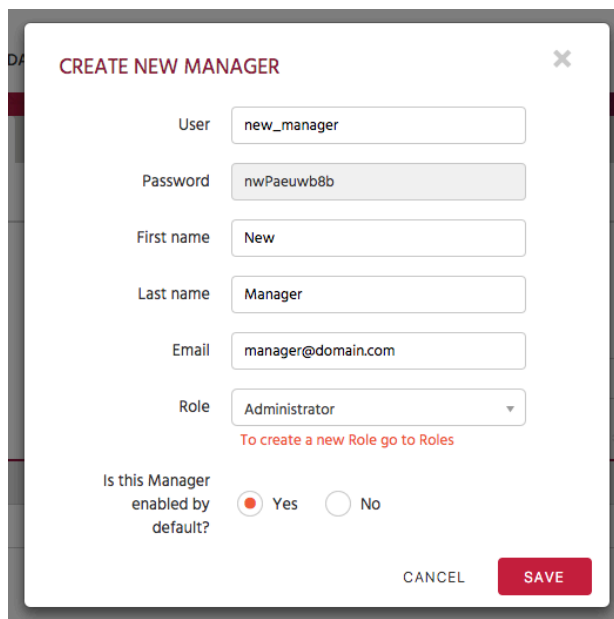
The steps to create a new manager are described below.

1. Press **Add new Manager** button. A modal will appear on screen. Enter information for:
 - *** User:** This field is used to set the username to access Squid.
 - *** Password:** This field shows the password to access Squid. The password field will be auto-generated, but the manager can change it in the Profile section.

- **First name:** This field is used to set the manager account's first name.
 - **Last name:** This field is used to set the manager account's last name.
 - **Alternative Email:** This field is used to set an alternate email to link with the manager account.
2. Select an available Role. By default, the Administrator role is selected. It's recommended to create a role before start creating more manager accounts for the entity.
 3. Select if the account will have an active or suspended status when is created in the Enable section. By default, the account is enabled.
 4. Review all information and click on **Save** button to save changes or on **Cancel** button to cancel the creation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.



The screenshot shows a modal window titled "CREATE NEW MANAGER" with a close button (X) in the top right corner. The form contains the following fields and controls:

- User:** Text input field containing "new_manager".
- Password:** Password input field containing "nwPaeuwb8b".
- First name:** Text input field containing "New".
- Last name:** Text input field containing "Manager".
- Email:** Text input field containing "manager@domain.com".
- Role:** Dropdown menu showing "Administrator". Below it, a red text link says "To create a new Role go to Roles".
- Is this Manager enabled by default?:** Radio button group with "Yes" selected (indicated by a red dot) and "No" (indicated by an empty circle).
- Buttons:** "CANCEL" and "SAVE" buttons at the bottom right.

Figure 9 - Squid Settings – Managers – Create New Manager.

NOTES: Fields with a “*” are mandatory.

Edit an existing manager:

This option is used to edit an existing manager account for an entity. Also, with this option is possible to reset a password for a manager account.

Steps to edit a manager account are described below:

1. From the manager search list, select the manager account to be modified.
2. Click on the edit icon. A confirmation window will be shown on screen.
3. Modify the corresponding information. If a password reset is required, just press the **Generate button** to generate a new random password.
4. Review all information and click on **Save** button to save changes or on **Cancel** button to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

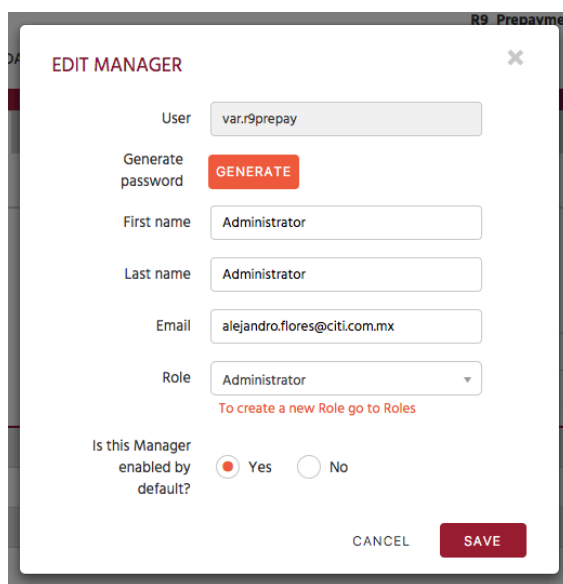


Figure 10 - Squid Settings – Managers – Edit Manager.

Delete an existing manager:

This option is used to remove an existing manager account for the current entity. A manager account can't be removed by itself.

Steps to remove a manager account are described below:

1. From Manager List, search and select the manager account to be deleted.
2. Click on the **Delete icon**. A confirmation window will be shown on screen.
3. Click on **Delete** to delete the account or on **Cancel** button to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

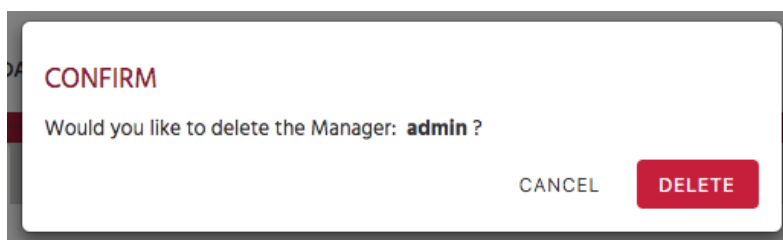


Figure 11 - Squid Settings – Managers – Delete Manager.

Suspend/reactivate an existing manager:

This option is used to suspend or reactivate an existing manager account for the current entity. If a manager is suspended, it will not be able to access Squid Web admin portal.

Steps to suspend a manager account are described below:

1. From Manager List, search the manager account that will be suspended.
2. Click on the **status icon**. A confirmation window will be shown on screen.
3. Click on **Suspend** to suspend the account or on **Cancel** button to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

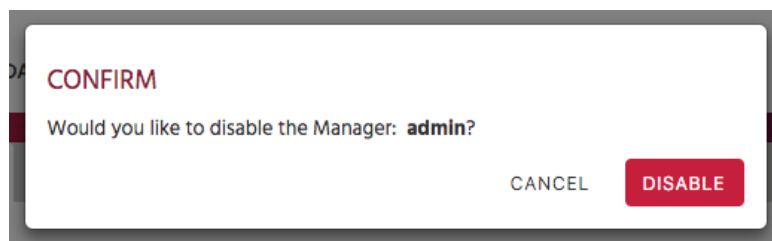


Figure 12 - Squid Settings – Managers – Suspend Manager.

NOTES: Once the manager account is suspended, the status icon will change its color to identify easily the identification of suspended managers from the active managers.

	admin@squidox.com	SquidOX	Admin	Administrator		
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Figure 13 - Squid Settings – Managers List.

Steps to reactivate a manager are described below:

1. From Manager List, search the manager account to be activated (identified by different color).
2. Click on the **status icon**. A confirmation window will be shown on screen.
3. Click on **Activate** to activate the account or on **Cancel** button to cancel the operation.

Operation results:

Success	A success status window will be displayed.
----------------	--

Error	An error status window will be displayed with details about the error.
--------------	--

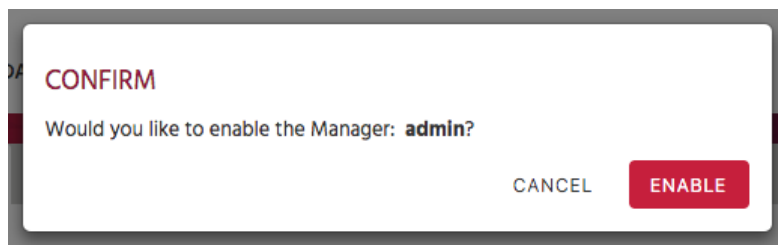


Figure 14 - Squid Settings – Managers – Activate Manager.

Roles



This sub-section is used to view, create, modify or delete roles from a current entity. This functionality is common for all entities' managers in the entire distribution network in Squid. Roles are attributes used to define different permissions like view, creation, modification and elimination on Squid Web admin portal for different sections and objects.

Role permissions and Squid sections are explained here:

Available permission options:

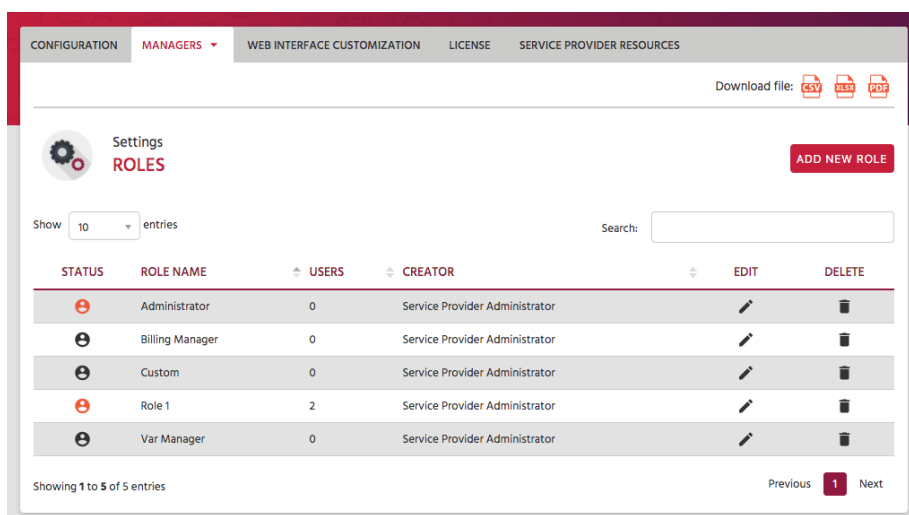
- **View:** Will allow a user to only read information about objects created on Squid.
- **Create:** Will allow a user to only create objects on Squid.
- **Modify:** Will allow a user to modify object information on Squid.
- **Delete:** Will allow a user to delete objects on Squid.
- **Save Information:** A user will be able to use the save button in specific Squid sections.
- **Activate or Suspend:** Will allow a user to suspend or reactivate objects in Squid.

Squid applies permissions over specific sections. For every section a permission is defined, a user will have proper permission to perform an action.

Sections and sub-sections for Role permissions are:

- **Settings:** Configuration, Managers, Roles, Web Interface Customization, License, Resources.
- **Catalog:** Features, Packages and Discount Groups.
- **Dashboard:** Overview Report, VARS, Dynamic, Scheduled Reports.
- **Entities:** Value Added Resellers, Resellers and Enterprise Customers.
- **Upselling:** Dependents pending requests, dependents request history. Squid Distribution Network.
- **Billing:** invoices, historic data, scheduled notifications, receipt template.

When a role is created, permissions are given for each Squid web admin portal section and based on privileges (view, create, modify, delete, suspend or reactivate). In order to access this section, follow the next path: Home Page -> Header Section -> More icon -> Settings -> Managers -> Roles



STATUS	ROLE NAME	USERS	CREATOR	EDIT	DELETE
	Administrator	0	Service Provider Administrator		
	Billing Manager	0	Service Provider Administrator		
	Custom	0	Service Provider Administrator		
	Role 1	2	Service Provider Administrator		
	Var Manager	0	Service Provider Administrator		

Figure 15 - Squid Settings – Roles List.

Roles Page has the following attributes:

Roles:	Table shows all existing roles created for an entity.
Add New Role:	Button used to create a new role.
Download file:	Buttons are used to export content related to the roles table information, which supports CSV, XLSX & PDF formats.
Show entries:	This drop-down box shows the number of entries in the roles table.
Search:	This field is used to search an element in the roles table, the search feature will work as the user query.
Pagination buttons:	These buttons (previous and next) are used to change the table page for showing records.
Edit:	This icon button is used to edit an existing role.
Delete:	This icon button is used to delete an existing role.
Suspend/Reactivate role:	This icon button is used to suspend or reactivate a role.

Create a New Role:

This option is used to create a new role for the current entity. Steps to create a role manager are described below:

1. Click on **Add new Role**. A new page will be shown.
2. Fill the Role name field.

3. Choose either from the dropdown box, active or suspended role status.
4. Select the permissions for a new role. The permissions for a created role are: view, create, modify and delete options for each section in Squid's Web admin portal.
5. Review all information and click on **Create** to create the new role or on **Cancel** button to cancel the operation.

Operation results:

Success A success status window will be displayed.

Error An error status window will be displayed with details about the error.

Squid Admin Administrator

HOME ENTITIES CATALOG DASHBOARDS BILLING UPSELLING

← CREATE NEW ROLE

GENERAL INFO

Role name Status **Active**

PERMISSIONS

Select which sections this role will be able to see and manage

ENTITIES

☐ VAR ☐ Reseller ☐ Enterprise Customer

☐ View ☐ View ☐ View

☐ Create ☐ Create ☐ Create

☐ Administrator

BILLING

☐ Modify ☐ View

☐ View billing ☐ Modify

☐ View history ☐ View history

☐ Mail Alert

☐ Receipt Template

UPSELLING

CATALOG

Figure 16 - Squid Settings – Roles – Create New Role.

NOTES: Every entity on Squid can control his own role names and options, so roles created for a specific entity are not replicated to another one, this means every VAR, Reseller and Enterprise Customer will have his own set of roles.

Edit an existing Role:

This option is used to create a new role for the current entity.

Steps to create a role manager are described below:

- 1. From Role List, search the role to be modified.
- 2. Click on the **edit icon**. You will be redirected to Role Edit Page.
- 3. Change the permissions by selecting or un-selecting them using the checkbox for each one.
- 4. Review all information and click on **Save** to save changes or **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

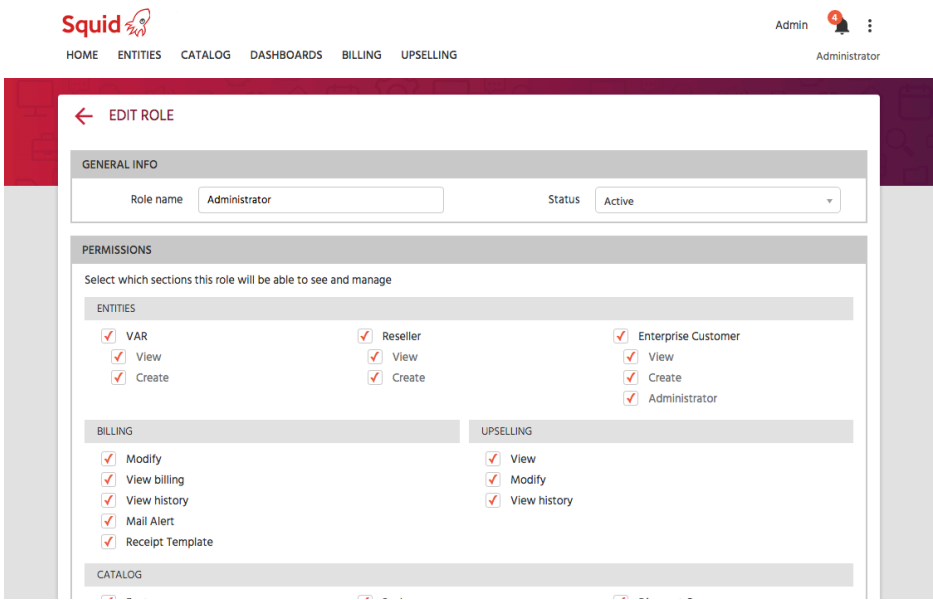


Figure 17 - Squid Settings – Roles – Edit Role.

NOTES: Permissions for managers are applied in its next login session, so if a manager role has been modified and that manager has an active session on Squid, he must re-login in order to refresh its permissions.

Delete an existing Role:

This option is used to delete an existing role for a current entity.
Steps to delete a role are described below:

- 1. From Role List, search the role to be deleted.
- 2. Click the **delete icon**. A confirmation window will be shown on screen.
- 3. Click on **Delete** to delete the role or **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

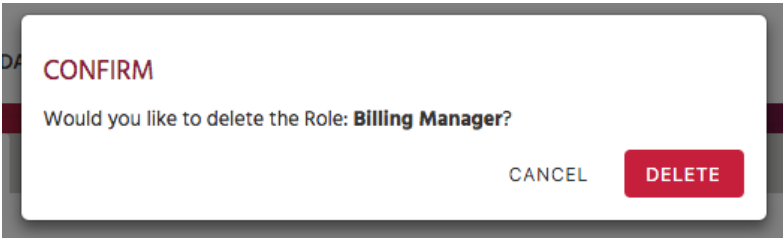


Figure 18 - Squid Settings – Roles – Delete Role.

NOTES: A role that has managers assigned can't be deleted.

Suspend/Activate an existing Role:

This option is used to suspend or reactivate an existing role for a current entity.

Steps to suspend a role are described below:

1. From Role List, search the role to be suspended.
2. Click the **status icon**. A confirmation window will be displayed on screen.
3. Click on **Suspend** to suspend the role or **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

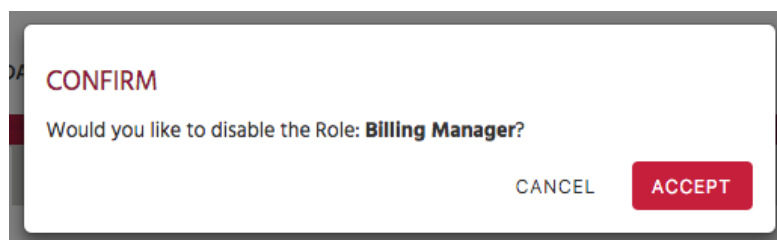


Figure 19 - Squid Settings – Roles – Suspend Role.

Steps to reactivate a role are described below:

1. From Role List, search the role to be reactivated.
2. Click the **status icon**. A confirmation window will be displayed on screen.
3. Click on **Activate** to activate the role or **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

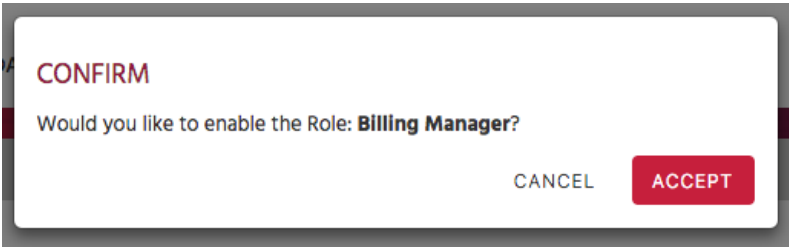


Figure 20 - Squid Settings – Roles – Activate Role.

	Billing Manager	0	Admin		
--	-----------------	---	-------	--	--

Figure 21 - Squid Settings – Roles List.

NOTES: When a role is suspended, the managers that have that role assigned will not have permissions to access Squid Web admin portal. Note that an administrator manager role can't be suspended or deleted.

Web Interface Customization

SP

VAR

EC

This section is used to modify the look and feel of the Squid web admin portal for each entity, which includes Logo and Color scheme. This functionality is common for all entities' managers in the entire distribution network in Squid. In order to access this section, follow the next path: Home Page -> More icon -> Settings -> Web Interface Customization.

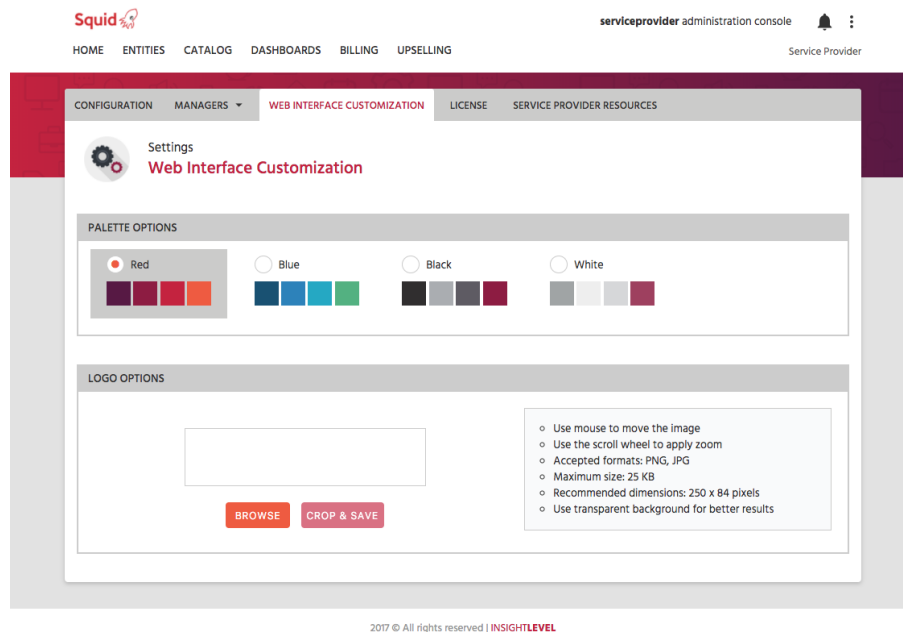


Figure 22 - Squid Settings – Appearance Page.

Web Interface Customization has the following attributes:

Admin Color Scheme:

This section allows to switch between different color scheme options for the look and feel of Squid.

Change Logo:

This section will allow uploading a custom logo to be shown in the Squid Web admin portal. Every entity can display his own logo if it's allowed by the network parent distributor.

Preview area:

This section is used to adjust and view the logo that will be used.

Browse button:

This button will perform a search for an image on a local drive.

Crop & Save button:

This button is used to crop and save the new logo.

License

SP

This sub-section allows viewing the Squid License that was installed. This section is only available for the service provider entity's manager. In order to access, the next path must be followed: Home Page -> Header Section -> More icon -> Settings -> License.

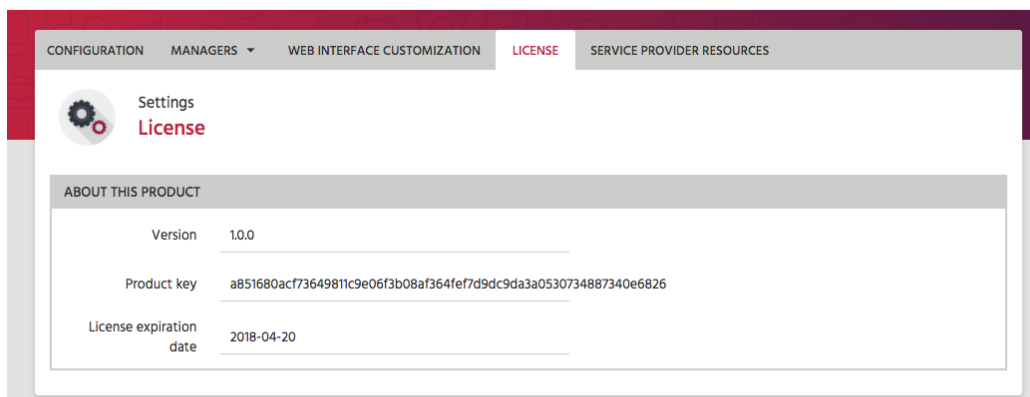


Figure 23 - Squid Settings – License Page.

Appearance Page has the following attributes:

Version:	This field shows Squid's License version.
Key:	This field shows the license key used on the Squid's installation.
Due date:	This field shows the due date of the Squid's license.

NOTES: Neither of these fields can be changed, Squid needs a connection to Insight Level License Manager Service in order to keep working. If that connection is denied or lost, Squid will suspend operations after a while, this means manager access will not be allowed until that connection is re-established again. When connection is re-established, Squid will work again.

Squid performs one check per day to Insight Level's License Manager Service or when a login is performed and Squid has detected that there was previously no access to the License Manager.

Resource

SP

This sub-section is used to view Squid resources such as Open-Xchange licenses and server storage. This section is only available for the Service Provider entity. In order to access this section, follow the next steps: Home Page -> Header Section -> More icon -> Settings -> Resource.

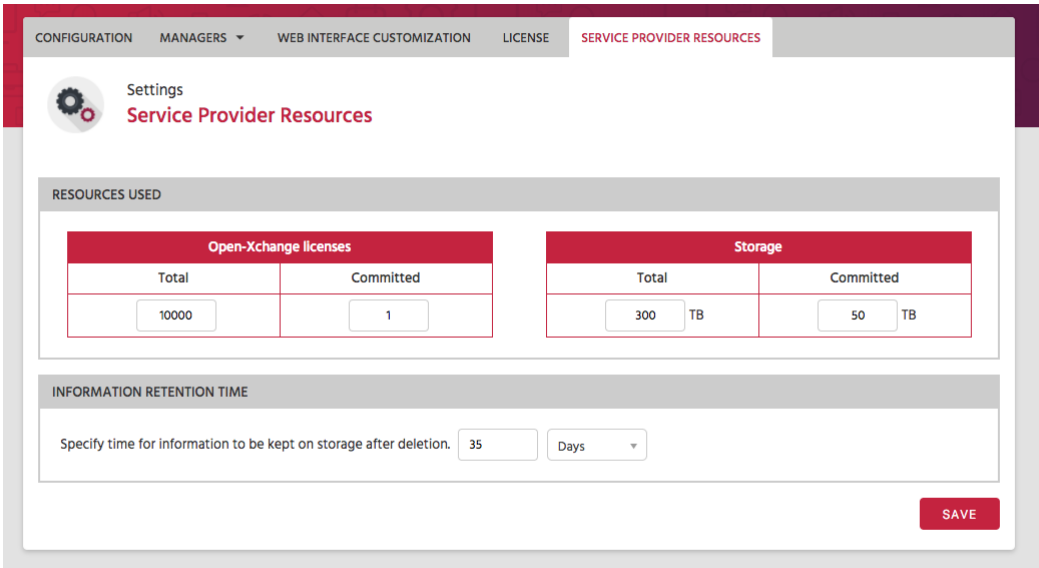


Figure 24 - Squid Settings – Resource Page.

Resource Page has the following attributes:

Resources used:	This section shows the resources such as Open-Xchange licenses and available server storage.
Open-Xchange Licenses:	This table shows total and committed Open-Xchange licenses, where committed licenses are the licenses available in the Open-Xchange’s App Suite and total licenses are those used by users in the Open-Xchange App Suite.
Storage:	This table shows total and committed storage. Committed storage is that required by all the packages assigned to the end-users in the App Suite Platform. On the other hand, the total storage is that available for the App Suite Platform.
Storage Threshold:	This section shows server storage used and available with a threshold to send an alert related with its usage.

Storage bar:	This bar shows the total storage used by the dependent.
Select limit field:	Used to set a threshold to send an alert to the Service Provider Manager about the percentage of storage usage.
Limbo time:	Used to define a scheduled clean of removed user information.
Time in storage after deleted:	This field defines the number of days or months that the data will be stored after a user is deleted by Squid, it means that once Squid delete an end user mailbox account in Open-Xchange App Suite platform, the information remains for further backup purposes, but after this time the information will be deleted permanently.
Time in storage after deleted:	This drop-down button is used to define days or months for the input given in the previous field.
Save button:	This button is used to save the configuration.

NOTES: All the information related to licenses and storage is based on the information delivered by the Open-Xchange API.



Regional settings

Regional settings

SP

VAR

RESELLER

EC

This section is used to change the way Squid shows the information. This includes Language, Calendar type, Time Zone, Date Format and Number Separators. This functionality is common for all entities' managers in the entire distribution network in Squid. In order to access this section, follow the next path: Home Page -> Header Section -> More icon -> Regional Settings.

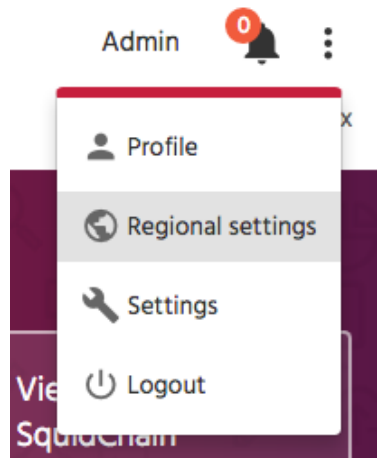


Figure 1 - Squid's Regional Settings option.

When you click on Regional Settings option, a new window will be displayed on screen.

REGIONAL SETTINGS [X]

Select language: Español

Time format: 24-Hour Time

Date format: dd MMMM yyyy

Numeric symbols

Grouping: ,

Decimal: .

CANCEL ACCEPT

Regional Settings modal has the following attributes:

Select language:	This drop-down box is used to select the preferred language, options available are English or Spanish.
Calendar:	This drop-down box is used to select the preferred calendar type, Squid currently supports only Gregorian calendar.
Time Zone:	This Drop-down box is used to select preferred time zone, Squid currently supports only GMT time zone.
Time format:	This field only shows the time format used in Squid.
Define drop-down boxes:	These drop-down boxes are used to define the way Squid will display the date, default date format is “yyyy/mm/dd”.
Grouping box:	This drop-down box is used to select the separator used to group numbers on Squid’s platform.
Decimal box:	This drop-down box is used to select the separator for decimals on Squid’s platform.



Notifications

Notifications



This feature shows notifications from Squid's or Insight-Level's License Manager, this functionality is common for all entities' managers in the entire distribution network in Squid. Notifications are independent alerts for every manager in Squid. Some notifications contain links and information that redirect the manager to a specific section or web page. All notifications can be deleted. In order to access this section, follow the next path: Home Page -> Header Section -> Notification icon.

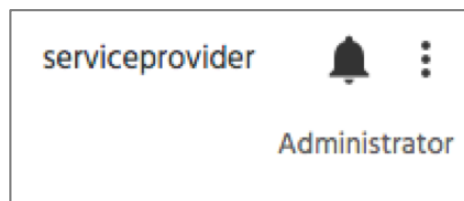


Figure 1 - Squid Home – Notifications icon (bell icon).

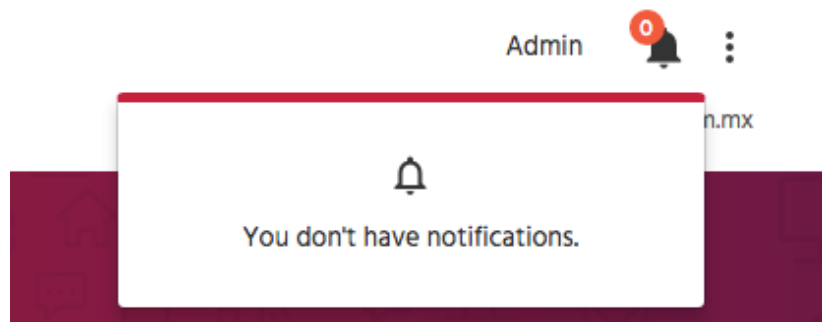


Figure 2 - Squid Home – Notifications section (empty notifications box).



Catalog

- Catalog
- Features & Storage Tiers
- Packages
- Discount Groups

Catalog

SP

VAR

RESELLER

The Catalog section includes features, packages and discount groups sub-sections.

Squid Operation rules for these sections are:

- **Features:** Only Service Providers can sync and manage new features and storage tiers. If a VAR has enough permissions, it will be able to manage new features.
- **Packages:** Packages can only be managed by a Service Provider. If a VAR has enough permissions, it will be able to build his own packages based on the available features.
- **Discount Groups:** Service Providers and VARs with the corresponding permissions, can manage discount groups.

Features & Storage Tiers

SP

VAR

This section is used to view, create, change or delete Squid's features and storage tiers. Features are functionalities that can be packaged together. Features and storage tiers are mandatory items that need to be defined before the creation of a package.

These features can be either native features (Open-Xchange App Suite features) or custom features:

Native features (OX features):

These are the default functionalities provided by the Open-Xchange Platform such as OX PIM, OX Drive, OX Documents, OX Guard & OX Sync.

**Native features
(OX features):**

It's important to emphasize that available features depend on Open-Xchange instance installation, and the API provided by Open-Xchange. For instance, if an Open-Xchange installation only has OX PIM, OX Sync and OX Drive, in Squid only these native features will be shown.

The native features from Open-Xchange are displayed on Squid and can't be removed, but using the "Refresh OX Features" button it can be synchronized with the Open-Xchange installation.

Custom features:

These are the custom features that can be added to packages. The custom features on Squid can be created, modified and deleted. Custom features don't enable any functionality, but are used only as a reference in packages. For instance, if a VAR wants to enable the "Call Center support" to an Enterprise Customer, it could add the Call Center feature or, if a package will be delivered with another third-party software, it could be added, but Squid will not supply any change on the third-party software.

NOTES:

- Custom features can be deleted only if they are not assigned to packages or when the package has been deleted.
- For each feature added in Squid it's possible to set a reference price. This price is only used to establish a base price when building a package, but has no impact on Squid billing feature.
- Prices for features can be modified at any time.

Storage tiers are used to define multiple storage options for the packages. The tiers are defined in ranges; every new range will begin with the next number of the last range. Storage tiers are defined in Gigabytes (GB).

For each tier can be defined a base price, but these prices are only used as a reference in order to establish an estimated base price for that package.

Storage tiers may be created, modified and deleted, but if there are packages linked with a storage tier, it won't be possible to delete that storage tier until the packages are deleted. In order to access this section, follow the next path: Squid Menu -> Catalog -> Features.

FEATURES		
OX PIM	OX Sync	OX Drive
\$ 1.5	\$ 2	\$ 2.5
Documents	OX Messenger	OX Guard
\$ 1.05	\$ 2	\$ 5
Service 6x5	Call Center	Service 7x24
\$ 5	\$ 5	\$ 5

STORAGE TIERS		
GB	GB	Price
0	to 10	= 91.00
11	to 20	= 150.30

Figure 1 - Squid Catalog – Features & Storage Tiers.

Create a New custom Feature:

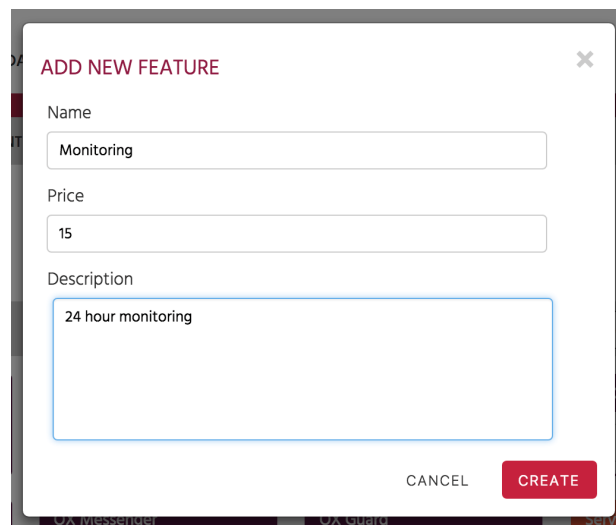
This section allows creating a new custom feature for the current manager entity. Steps to create a new custom feature are described below:

1. Click on **Add Feature** button. A confirmation window will be displayed on screen.
2. Enter the information for the fields:
 - *** Name:** This field is used to set a name for the new custom feature. The name for the new custom feature must be unique.
 - *** Price:** This field is used to set a reference price for the new custom feature.
 - *** Description:** This field is used to add a description for the new custom feature.
3. Click on **Create** to create the new feature or **Cancel** to cancel the operation.

Operation results:

Success A success status window will be displayed.

Error An error status window will be displayed with details about the error.



ADD NEW FEATURE

Name
Monitoring

Price
15

Description
24 hour monitoring

CANCEL CREATE

Figure 2 - Squid Catalog – Features – Add New Feature.

NOTES: Fields with a “*” are mandatory.

Edit an existing custom Feature:

This option is used to edit an existing custom feature for the current manager entity.
Steps to edit an existing custom feature are described below:

1. From Features list; search the custom feature to be modified.
2. Click on **Edit Feature** button. A confirmation window will be displayed on screen.
3. Enter the following information:
 - **Name:** This field is used to modify the custom feature name.
 - **Price:** This field is used to modify the custom feature price.
 - **Description:** This field is used to modify the description of the custom feature.
4. Click on **Save** to create the new feature or **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

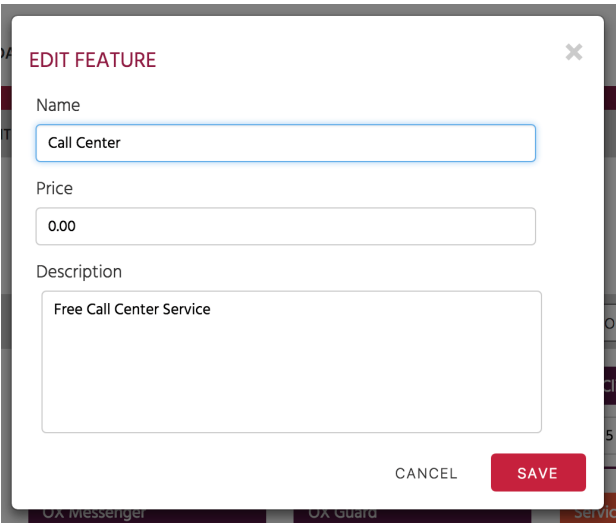


Figure 3 - Squid Catalog – Features – Edit Feature.

Delete an existing custom Feature:

This option is used to delete an existing custom feature. Custom features can only be deleted if they don't belong or aren't being used on a package; or if the package itself is deleted.

Steps to delete an existing custom feature are described below:

- 1. From Features list; search the custom feature to be deleted.
- 2. Click on **Delete feature** button. A confirmation window will be displayed on screen.
- 3. Click on **Delete** to create the new feature or **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

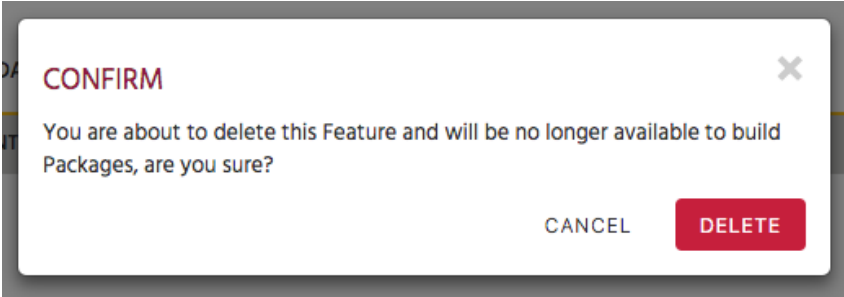


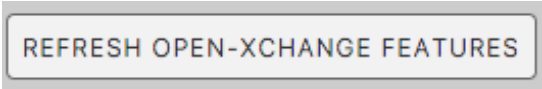
Figure 4 - Squid Catalog – Features – Delete Feature.

Sync OX Features:

This button is used to sync Open-Xchange features with Squid. Open-Xchange sync feature is only available for the Service Provider entity.

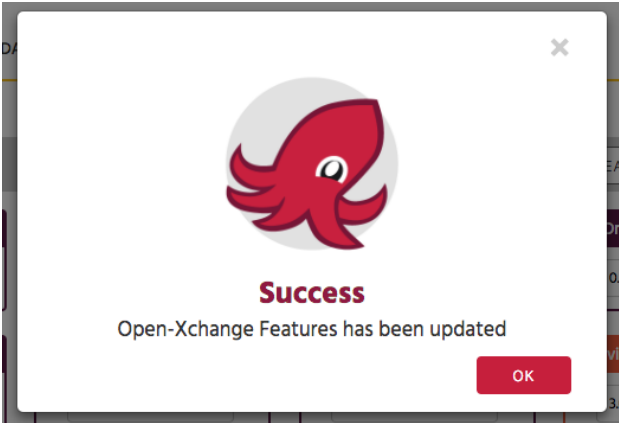
Steps to sync an Open-Xchange feature catalog are described below:

- 1. Click on **Refresh OX Features** button. A process will begin.



Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.



Create a New Storage Tier:

This option is used to create a new storage tier. Storage tiers can only be created, modified or deleted by a Service Provider entity.

Steps to create a new storage tier are described below:

- 1. Click on **Add Option** button in Storage Tier section. A new storage tier will be created.
- 2. Enter the following information:

* Min GB:	Min GB storage. This field is used to set the initial storage range; the value can be zero. The value should not be already in the range of other storage ranges.
* Max GB:	Max GB storage. This field is used to set the final storage range; this field accepts decimal numbers. The final range value must not be already in the range of other storage tiers ranges.
* Price:	This field is used to set a price for a new storage tier.

- 3. Click on **Save** button (at the bottom of the page) to save all changes or **Remove** button cancel to delete the current storage tier.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

STORAGE TIERS

GB		GB		Price	
<input type="text" value="0"/>	to	<input type="text" value="10"/>	=	<input type="text" value="91.00"/>	
<input type="text" value="11"/>	to	<input type="text" value="20"/>	=	<input type="text" value="150.30"/>	
Add option					

Figure 5 - Squid Catalog – Features – Storage Tiers block.

NOTES: Squid fills automatically the next storage tier with the next integer number of the final range of the last storage tier.

Edit an existing Storage Tier:

This option is used to edit an existing storage tier.
Steps to edit an existing storage tier are described below:

- 1. From Storage Tiers list, find the storage tier to be modified.
- 2. Change the min range or max range field.
- 3. Click on **Save** button (at the bottom of the page) to save all changes.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

STORAGE TIERS

GB		GB		Price	
<input type="text" value="0"/>	to	<input type="text" value="10"/>	=	<input type="text" value="91.00"/>	
<input type="text" value="11"/>	to	<input type="text" value="20"/>	=	<input type="text" value="150.30"/>	

Add option

Figure 6 - Squid Catalog – Features – Storage Tiers block.

Delete an existing Storage Tier:

This option is used to delete an existing storage tier. Only Service Providers can control storage tiers; a storage tier can't be deleted if it's being used in a package.

Steps to delete an existing storage tier are described below:

- 1. From Storage tier list, find the storage tier to be deleted.
- 2. Click on **Remove** button.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

Packages

SP

VAR

RESELLER

This section allows to view, create, change status or delete Squid Packages. Packages are fundamental for Squid billing features, meaning that if a Package is created and later assigned to a VAR, Reseller or Enterprise Customer, it will have direct impact in the billing core system.

Packages that were created can't be modified; they can be deleted but only if they were not assigned to a VAR, Reseller or EC. Packages are built based on the catalog features (Open-Xchange's features and custom features) and the storage tiers created.

Packages are mandatory items that need to be created before provisioning entities in the distribution network.

In order to access this section, follow the next path: Squid's Menu -> Catalog -> Packages.

FEATURES PACKAGES DISCOUNT GROUPS

Download file:

Catalog Packages

ADD NEW PACKAGE

Show 10 entries

Search:

STATUS	NAME	USED PACKAGES	STORAGE	PRICE	CREATION DATE	DETAIL	DELETE
	A new, package	0	10 GB	\$ 13.00	02 November 2017		
	AdvancedMail	0	5 GB	\$ 7.00	09 August 2017		
	AnotherPackage	0	20 GB	\$ 10.00	05 December 2017		
	BasicWebMail	2	5 GB	\$ 5.00	09 August 2017		
	CollaborationSuite	1	15 GB	\$ 11.50	09 August 2017		
	Full Package with Support	0	10 GB	\$ 17.00	09 October 2017		
	PackageNewIT	0	10 GB	\$ 10.00	12 December 2017		
	Package Premium 10GB	0	10 GB	\$ 11.00	29 November 2017		
	Package Premium 20GB	0	17 GB	\$ 20.00	10 October 2017		
	StorageMail	1	10 GB	\$ 10.00	09 August 2017		

Showing 1 to 10 of 10 entries

Previous

1

Next

Figure 7 - Squid Catalog – Packages List.

Packages List Page has the following attributes:

Packages:	This table will show a list with all the packages created by the entity.				
Add New Package:	This button is used to create a new package.				
Download file buttons:	These buttons are used to export the packages in CSV, XLSX or PDF formats.				
Show list:	This drop-down option is used to define the number of rows or entries to show per page.				
Search:	This field is used to find an element in the packages table; the search feature will work as the user enters information.				
Pagination buttons:	These buttons (Previous and Next) are used to navigate between the pages of the table and show more items.				
Detail:	This icon button is used to view details of a created package. Details include features that were created with the package and the storage options.				
Delete:	This icon button is used to delete an existing package.				
Suspend/Activate package:	This button is used to suspend or reactivate a package.				
Packages Table:	This table lists all the packages created by the parent entity on the distribution network with the following fields: <table> <tr> <td>Status:</td><td>This icon button is used to suspend or reactivate a package.</td></tr> <tr> <td>Name:</td><td>This field displays the package name.</td></tr> </table>	Status:	This icon button is used to suspend or reactivate a package.	Name:	This field displays the package name.
Status:	This icon button is used to suspend or reactivate a package.				
Name:	This field displays the package name.				

Used Packages:	This field displays the total number of users assigned to the package, this number counts all the users of the entity.
Storage:	This field displays the storage assigned to the package.
Price:	This field displays the price of the package; this price is used to show to dependents.
Creation Date:	This field displays the package creation date.
Detail:	This icon button displays a window with the package details.
Delete:	This icon button allows to delete a package.

NOTES:

- Packages used by a VAR, Reseller or Enterprise Customers can't be deleted.
- If a Package is suspended, this package will not be available to sell anymore, but customers with current package assignation will continue to use that package.
- Packages can only be deleted once they are no longer used for any entity.
- When a package is created, a suggested price will be displayed, but the SP or VAR can use any upraised price required.
- Packages prices can't be lower than the suggested prices set on the features, but if there is a modification on the catalog features or storage tier prices, this will have no impact on the package created or the price set for the package.

The Package interface for Value Added Resellers, Resellers or Enterprise Customers that can't create packages, has different fields, and basically can use this interface to check the number of packages assigned versus the users provisioned.

STATUS	NAME	USED PACKAGES	TOTAL ASSIGNED PACKAGES	STORAGE	PRICE	ASSIGNATION DATE	DETAIL
	A new, package	2	5	10 GB	\$ 14.00	02-11-2017	
	AdvancedMail	38	200	5 GB	\$ 7.00	09-08-2017	
	BasicWebMail	40	50	5 GB	\$ 5.00	09-08-2017	
	CollaborationSuite	26	200	15 GB	\$ 11.50	09-08-2017	
	StorageMail	10	200	10 GB	\$ 10.00	09-08-2017	

Squid Catalog – Package List for Value Added Resellers, Resellers that inherit packages and Enterprise Customers.

Packages List Page has the following attributes:

Package List Table:

This table shows the list of packages assigned by the parent entity, and has the following fields:

Status:	This field shows the current packages status (enabled or disabled) and also is used to enable or disable a package.
Name:	This field displays the Package name.
Used Packages:	This field counts the number of users using the package.
Total Assigned Packages:	This field displays the total number of licenses assigned by the parent entity.
Storage:	This field displays the storage assigned to the package.
Price:	This field displays the package price.

Assignment**Date:**

This field displays the package creation date.

IMPORTANT NOTES: Packages can be assigned or created based on the permissions set to the VAR by the Service Provider, so VARs that doesn't have the package or catalog feature creation permission, are only allowed to assign packages. The VAR can't create them, but it can modify (up-rise) the price of a package when the package is assigned to an Enterprise Customer or a Reseller. On the other hand, VARs that are able to create packages can create their own packages, but only using the features assigned by the Service Provider. These same rules apply for any entity in the distribution network.

Create a New Package:

This option is used to create a package for the current entity.

Steps to create a new package are described below:

1. Click on **New Package** button. You will be redirected to **Create New Package** page.
2. Enter the information for the next fields:
 - **Name:** This field is used to set a name for the new package. Package's name must be unique.
 - **Features:** This select option box is used to choose all the features that will be included in the package, by default, all packages include the basic OX PIM feature, this feature is mandatory.
 - **Storage tiers in gigabytes:** This dynamic bar is used to choose the amount of storage in GB to be assigned to the package; this is a mandatory selection and can't be zero.
 - **By Default this package will be Enabled?:** This option is used to choose if the package will be enabled or not, by default, the package is enabled.

- **Estimated Price:** This field shows an estimated price built using the sum of the prices set for each feature and storage tier option, in other words, it is the minimum price set for the package. This is a read only field.
- **Price:** This field is used to set a custom price for the new package. This price must be greater or equal than the estimated price, but not lower. The price set here is the price that will be used by Squid billing feature.

3. Click on **Create** to create the new package or **Cancel** to cancel the operation.

Operation results:

Success A success status window will be displayed.

Error An error status window will be displayed with details about the error.

Figure 8 - Squid Catalog – Package – Create New Feature.

	Package Premium 15GB	0	15 GB	\$ 8.50	12 January 2018		
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Figure 9 - Squid Catalog – Package List.

Suspend/Reactivate an existing Package:

This option is used to suspend or reactivate an existing package. If a package is suspended, it will not be shown again for VARs or for Resellers Sales interface. The Upselling interface for Enterprise Customers has the same behavior. However, the package won't be disabled for those End Users that were previously assigned. In other words, suspending a package means that it is no longer available for sale.

Steps to suspend a package are described below:

1. From Package list; find the package to be suspended.
2. Click on the **status icon**. A confirmation window will be displayed on screen.
3. Click on **Suspend** to suspend the package or **Cancel** to cancel the operation.

A package suspended will be displayed in a different color in the package table. This will allow VARs and Resellers to easily identify between suspended and active packages.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

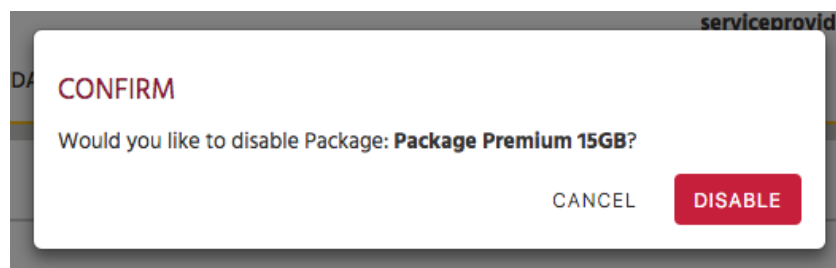


Figure 10 - Squid Catalog – Packages – Suspend Package.




	Package Premium 15GB	0	15 GB	\$ 8.50	12 January 2018		
---	----------------------	---	-------	---------	-----------------	---	---

Figure 11 - Squid Catalog – Package List.

Steps to reactivate a package are described below:

1. From Package list; search the package to be reactivated.
2. Click on the **status icon**. A confirmation window will be displayed on screen.
3. Click on **Accept** to activate the account or **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

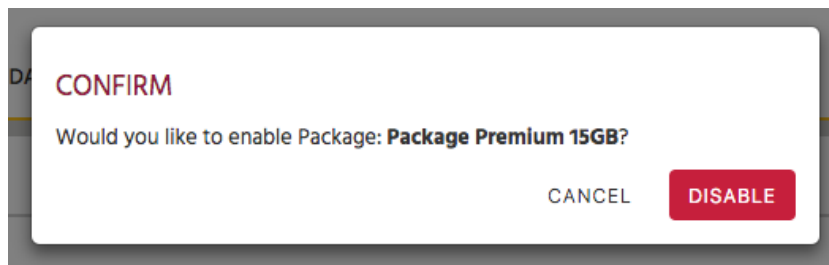


Figure 12 - Squid Catalog – Package – Activate Package.




	Package Premium 15GB	0	15 GB	\$ 8.50	12 January 2018		
---	----------------------	---	-------	---------	-----------------	---	---

Figure 13 - Squid Catalog – Package List.

Delete an existing Package:

This option is used to delete an existing package. Packages can't be deleted if they are assigned to an Enterprise Customer. So, if a package needs to be deleted, all Enterprise Customers (End Users) need to be assigned to another package first, and then, the package can be deleted. Package deletion does not mean that historic data will be deleted; it means that the package will no longer be available for use.

Steps to delete an existing package are described below:

1. From Package list; find the package to be deleted.
2. Click on **Delete Package** button. A confirmation window will be displayed on screen.
3. Click on **Delete** to delete the package or **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

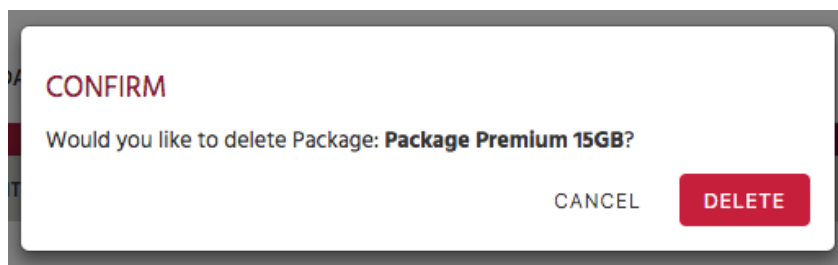


Figure 14 - Squid Catalog – Packages – Delete Package.

Discount Groups

SP

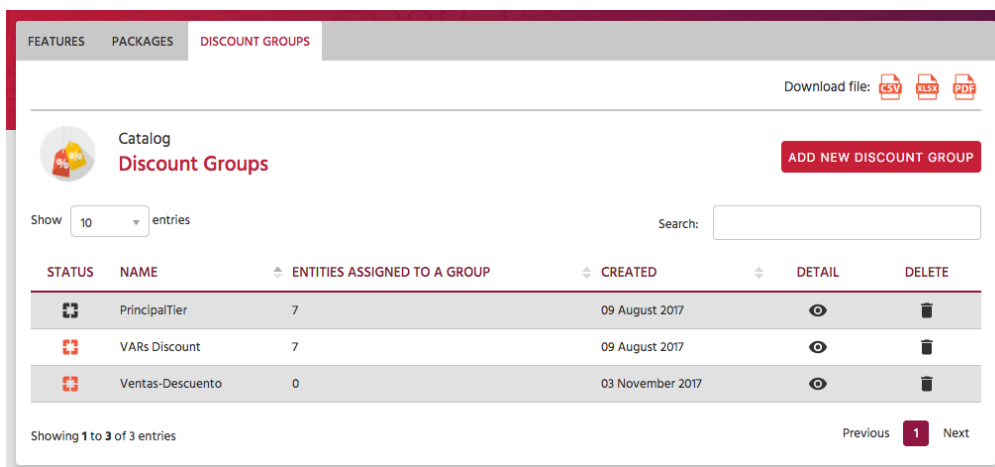
VAR

This section is used to view, create, change status or delete Squid Discount Groups. This section is only available to Service Provider or VAR entity's managers.

Discount Groups represent a commercial rule to apply on the VAR or Reseller sales, based on ranges of number of packages sold and a percentage of discount to apply by the parent entity.

A discount group cannot be modified once it has been created, because it has a direct impact on Squid's billing feature. Each entity is capable to build its own set of discount groups. The discount group is a mandatory element before procuring entities in the commercial distribution network. Discount groups allows Service Provider and VAR entities a flexible way to handle a negotiation with every entity in the distribution network.

In order to access this section, follow the next path: Squid Menu -> Catalog -> Discount Groups.



STATUS	NAME	ENTITIES ASSIGNED TO A GROUP	CREATED	DETAIL	DELETE
	PrincipalTier	7	09 August 2017		
	VARs Discount	7	09 August 2017		
	Ventas-Descuento	0	03 November 2017		

Showing 1 to 3 of 3 entries

Previous **1** Next

Figure 15 - Squid Catalog – Discount Group List.

Discount Group List page has the following attributes:

Discount Group table:	This table shows a list with all discount groups created by the entity.
New Discount Group:	This button is used to create a new discount group.
Download file buttons:	These buttons are used to export the table information to a file in CSV, XLSX and PDF format.
Show list:	This drop-down box is used to select the number of records to be displayed per page.
Search:	This field is used to search an element in the discount group table; the search feature will work as the user enters information.
Pagination buttons:	These buttons (Previous and Next) are used to change the table page.
Detail:	This icon button is used to view details about an existing discount group.
Delete:	This icon button is used to delete an existing discount group.
Suspend/Activate discount group:	This icon button is used to suspend or reactivate a discount group.

Create a Discount Group:

This option is used to create a discount group. Only SP and VAR entities are capable to create discount groups.

Steps to create a new discount group are described below:

1. Click on **Add New Discount Group button**. A confirmation window will be displayed on screen.
2. Enter data in the following fields:
 - **Group name:** This field is used to set the name for the new discount group. The name for the discount group must be unique.
 - **Add Tiers:** In this section it is possible to add all the commercial tiers required.
 - **Initial Range:** This field is used to set an initial range of packages to the tier, which is an integer number.
 - **Final Range:** This field is used to set the final range of packages to the tier, which is an integer number.
 - **Discount to apply:** This field is used to set a discount percent in order to apply over billing, as long as the total number of packages is within the initial and final range.
 - **New Tier:** This icon button is used to add new row to the discount group.
 - **Remove:** This icon button is used to remove a row on the discount group.
3. Click on **Save** to create the new discount group or **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

CREATE DISCOUNT GROUP

Group name

Discount group 2

Add new Tiers

Initial range		Final range		Discount to apply
1	to	10000	=	10 %
10001	to	20000	=	20 %
20001	to	30000	=	30 %

+ New Tier

CANCEL

SAVE

Figure 16 - Squid Catalog – Discount Group – Create Discount Group.

	Discount group 2	50	25-05-2017		
---	------------------	----	------------	---	---

Figure 17 - Squid Catalog – Create a New Discount Group.

Suspend/Reactivate an existing Discount Group:

This option is used to suspend or reactivate an existing discount group. A suspended Discount Group means this discount group is no longer available to be assinged to a VAR or a Reseller. VARs or Resellers with a discount group suspended will continue using that TIERS without any impact the Billing.

Steps to suspend a discount group are described below:

1. From Discount Group list find the discount group to be suspended.
2. Click on status icon. A confirmation window will be displayed on screen.
3. Click on **Accept** to suspend the discount group or **Cancel** to cancel the operation.

Once the Discount group is suspended, it will be displayed with a different color in the Squid Web admin portal, which will help to identify easily the group status.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

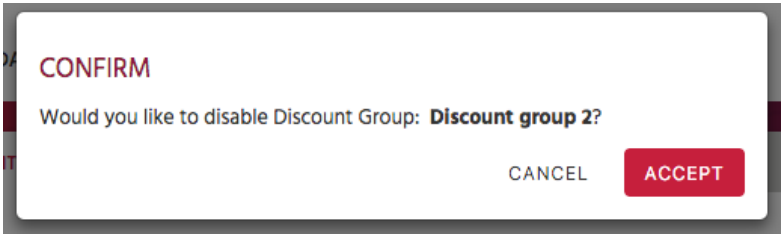


Figure 18 - Squid Catalog – Discount Groups – Suspend Discount Group.

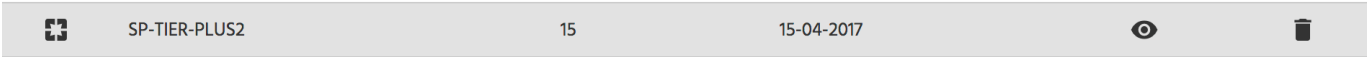


Figure 19 - Squid Catalog – Discount Groups List.

Steps to reactivate a package are described below:

1. From Discount Group list find the discount group to be reactivated.
2. Click on status icon. A confirmation window will be displayed on screen.
3. Click on **Accept** to activate the account or **Cancel** to cancel the activation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

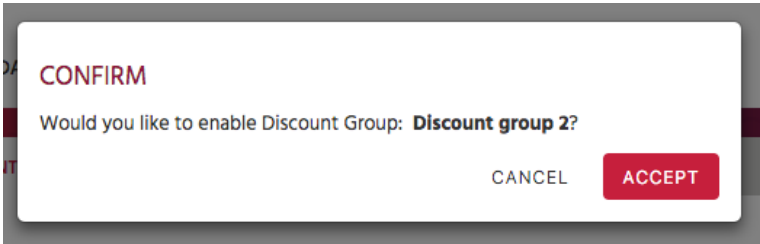


Figure 20 - Squid Catalog – Discount Groups – Activate Discount Group.

	SP-TIER-PLUS2	30	19-05-2017		
--	---------------	----	------------	--	--

Figure 21 - Squid Catalog – Discount Groups List.

Delete an existing Discount Group:

This option is used to delete an existing discount group. A Discount Group can't be deleted If it has been assigned to a VAR or a Reseller.

Steps to delete an existing discount group are described below:

1. From Discount Groups list, search the discount group to be deleted.
2. Click on Delete button. A confirmation window will be displayed on screen.
3. Click on **Delete** to delete package or **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

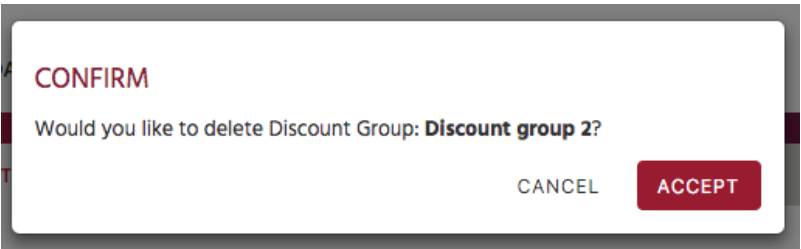


Figure 22 - Squid Catalog – Discount Groups List – Delete Discount Group.



Entities

- Entities
- Value Added Reseller
- Reseller
- Enterprise Customer

Entities

SP

VAR

RESELLER

Entities section allows creating, editing and deleting VARs, Resellers and Enterprise Customers. Entities menu has the following sub-sections: Value Added Resellers, Resellers and Enterprise Customers.

Squid Operation rules for this section are:

- Service Provider is only allowed to manage Value Added Resellers (VAR). It is able to create, edit or delete them, also, a Service Provider provides the functionality to impersonate a VAR, thus, a Service Provider may have full control of the platform.
- VARs are entities with all the options available, if permissions were given by the Service Provider, a VAR can create VARs, Resellers and Enterprise Customers as well.
- Reseller entities, if permissions were given by their parents (VARs), they will be able to manage Enterprise Customers.
- Enterprise Customers entities, the services provided for them are manage users, check packages available, see reports about user's consumption (dashboard) and see billing operations related to their consumption.

Value Added Reseller

SP

VAR

This section is used to view, create, modify and delete VAR entities. This section can only be used by the Service Provider or VAR entity's managers.

Before starting to create distribution network entities, it is required to create at least one package and one discount group, these items are mandatory to create the first VAR on the distribution network.

In order to access this section, follow the next path: Squid Menu -> Entities -> Value Added Reseller.

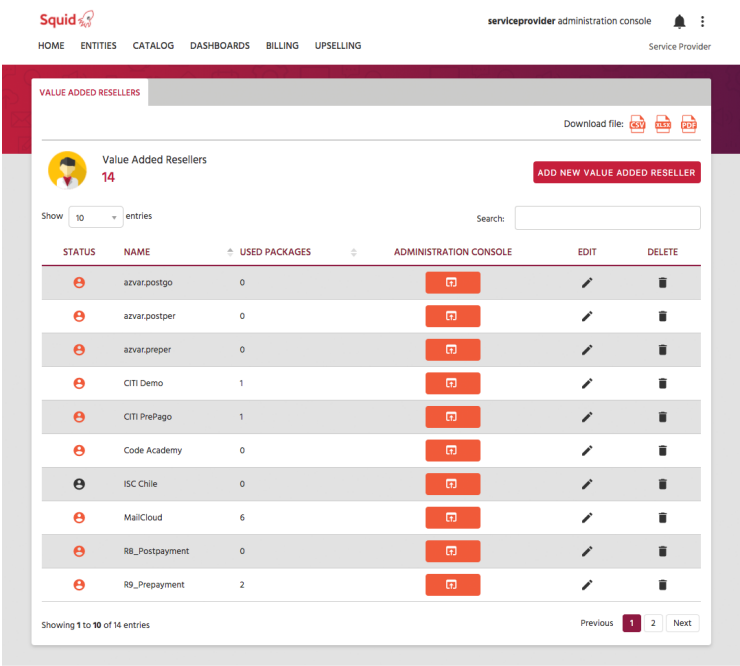


Figure 1 - Squid Entities – VAR List.

VAR List Page has the following attributes:

VAR:	This is a table that shows all VARs created by an entity; the Service Provider always creates the first VAR.
Add New VAR:	This button is used to create a new VAR in Squid.
Download file:	These icon buttons are used to export the table information in formats like CSV, XLSX and PDF.

Show list:	This drop-down menu allows to select the number of entries to be displayed on the table.
Search:	This field is used to search an element in the VAR table, the search functionality will work as the user enters information into it.
Pagination buttons:	These buttons (Previous and Next) are used to change the table page.
Administration console:	This icon button allows a Service Provider or a VAR impersonate manager credentials of the VAR selected, and will redirect the user to a new administration page, so the Service Provider can emulate a manager of the VAR entity. A VAR entity can emulate a manager for a Reseller or an Enterprise Customer and so on. In brief, administration button has the functionality to “login as” the manager of the selected entity.
Edit:	This icon button is used to edit an existing entity.
Delete:	This icon button is used to delete an existing entity.
Suspend/Activate:	This icon button is used to suspend or reactivate an entity.

Create a new VAR:

This option is used to create a new VAR.

Steps to create a new VAR are described below:

1. Click on **Add New Value Added Reseller button**. The manager is redirected to a new page to complete the information to create a new VAR.

1. Enter information in the following fields:

- *** Name:** This field is used to set a name for the new VAR; VAR name must be unique.
- *** Alias:** This field is used to set an alias name for the new VAR. Alias must be unique.
- **Address:** This field is used to define an address for the new VAR.
- *** Country:** This “search and complete” drop-down field is used to set a country for the new VAR.
- *** Zip Code:** This field is used to set a numeric Zip code for the new entity. Only numeric characters are accepted on this field.
- *** Tax ID:** This field is used to set a Tax ID for the new VAR.
- *** Email:** This field is used to set an e-mail address as contact information for the new account. This email will be associated with the first manager of the new account and will be used to send scheduled reports, it will also be used by the password recovery option.
- *** Client ID:** This field is used to set the client ID of the new entity.

Payment Details: This section is used to set the billing options for a new VAR, this section is very important because here is where the commercial rules are defined for the VAR.

- **Payment Details:** This section is used to set the billing options for a new VAR, this section is very important because here is where the commercial rules are defined for the VAR.
- *** Discount group:** This drop-down box allows to assign the discount group that will be applied to billing for the VAR.
- *** Due Day:** This field is used to assign the “Due date” for the VAR, this will be the day the billing is auto-generated for that entity. This field accept only numbers between 1 and 28.

- **Enable API Access?:** This selectable field is used to enable access to the Squid API. This is an important feature on Squid that allow third-party software to use the functions of Squid through this channel.
- **Enable Squid Marketplace?:** This selectable field is used to enable an entity to use the functionality to provide an URL to Enterprise Customer to use the self-registration web portal, so all customers using the link provided by the entity will be added automatically under his distribution network.

Payment Options: This section is used to set the billing options for the new VAR, as well as the previous section, it is very important because here the commercial billing rules are defined for the entity.

- *** Billing Type:** This drop-down box is used to define the billing type for the new VAR, the options available are "Pay per contract" and "Pay as you go". If a VAR is configured as "Pay as you go", it has the option to create his own packages; if a VAR is configured as "Pay per contract" the packages must be assigned by the parent.
- *** Payment Type:** This drop-down box is used to set the commercial option for a VAR, the options are "Pre-payment" and "Post-payment". Further details are explained on the billing section.
- *** Payment Method:** This drop-down box is used to set the payment method for the new VAR, options are "Paypal" and "other", further explanation about how this work is explained on the billing section.
- *** Credit Days:** This field is used to set the number of "Credit Days" that a VAR will have after the due date, before its account is suspended. Because this has an impact on the billing section, further details are explained on that section. Be aware that credit day field is only available for Post-Payment option.

Package Assignment: This section is used to assign packages to the VAR. This section is very important because here is where the packages are assigned to the VAR, and this assignment has an impact on the billing receipt or invoice from the parent to the VAR.

- *** Package:** This drop-down box allows selecting the package to be assigned to the VAR. All packages displayed are related to packages previously created in the Package Section.
- *** Price:** This input field allows setting a price for the package to be assigned, it's important to mention that the price set here is the price that will be displayed in the billing receipt for the VAR.
- *** Quantity:** This input field allows setting the number of packages to be assigned to the VAR. This has a direct impact on the billing invoice because the number set here is used to calculate the invoice for the VAR.
- *** Unlimited:** This field is only available for "Pay as you go" billing type VARs, basically allows using an unlimited number of packages. In other words, it means "pay for what you use". For "Pay per contract" billing type VARs, this option is not available.
- **Add:** This icon button is used to add different types of packages to the VAR.

NOTES: License Management section is very important to define, because all values defined here set the commercial rules to apply to the entity.

Permissions: This section is used to set VAR's permissions. Depending on the permissions selected, some options for the VAR will be available.

The Squid rules about VAR permissions are:

- **VAR:** This permission allows the entity manager to extend the distribution network, this means the manager can create Value Added Reseller entities under its management.
- **Reseller:** This permission allows the entity manager to extend the distribution network, this means the manager can create Reseller entities under his management.
- **Packages:** This permission allows the entity manager to create his own packages based on features inherited from its parent, this permission is only available for VARs belonging to the “Pay as you go” billing schema. If this permission is enabled, the entity manager must create packages before beginning to extend the distribution network.
- **New Features:** This permission allows the entity manager to create custom features, these custom features will only be available for its own distribution network. By default, if “New Features” are enabled, packages permission will be enabled too.
- **Web Interface Customization:** These permissions allow the entity manager to modify the look and feel of the Squid Web admin portal interface, limited to Logo change and color change.

User account:

- *** User:** This field is used to set a username for the entity manager.
- *** Password:** This field has an auto-generated password for the first account manager.
- **Generate button:** Button to generate a random password for the account manager.

3. Click on **Save** to create the new account VAR or **Cancel** to cancel the creation.

Success	A success status window will be displayed.
----------------	--

Error An error status window will be displayed with details about the error.

- Be aware, once the VAR is created and configured with specific billing options, these can't be changed, the only billing option that can be changed later is the "payment method".
- All input fields accept alphanumeric characters and some symbols.
- All field with a * are mandatory.

Figure 2 - Squid Entities – VAR – Add New VAR.

PERMISSIONS

To manage

- ☐ Value Added Resellers
- ☐ Resellers
- ☐ Packages
- ☐ New Features

☐ Web interface customization

USER ACCOUNT

User

Password

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Figure 2 - Squid Entities – VAR – Add New VAR.

Edit an existing VAR:

This option is used to edit an existing VAR.

Steps to edit an existing VAR account are described below:

1. From VAR list, search the VAR account to be modified.
2. Click on **Edit VAR** button. You will be redirected to the VAR detail page.
3. Only the next fields are available to modify:
 - **General Info:** Address, Country, State, City, Zip Code, Tax ID, E-mail, Client ID account.
 - **Payment Methods and Payment Details:** Payment Method, Credit Days (only for Post Payment accounts), API URL, API Cart Available.
 - **Licenses Management:** It's allowed to add new Packages to the entity.
 - **Permissions:** VAR, Reseller, Web Interface Customization.
 - **Packages:** This section is only displayed when editing information of a VAR, and it contains a table with the different types and number of packages assigned to the VAR. The objects that can be modified are:

- **Number of Packages:** This number can be increased or decreased, meaning that more packages are added or removed from the billing receipt. It's important to be aware that packages can only be decreased if they are not being assigned to Resellers or Enterprise Customers. In the same way, packages can't be deleted if they are assigned to dependents in the distribution network like other VARs, Resellers or Enterprise Customers.
 - **Dependents:** This new section is displayed only in the edition of a VAR, it allows to do a hierarchical change of all the dependents that belong to the distribution network from one entity to another.
 - **Hierarchical Change:** This button will redirect an entity manager to the Hierarchical Change section (this section will be explained below).
 - **Dependents table:** This table shows all dependents from the current entity describing the amount of End Users provisioned by each dependent.
4. Click on **Save** to save changes or **Back (arrow icon on the top of the page)** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

Squid serviceprovider administration console

HOME ENTITIES CATALOG DASHBOARDS BILLING UPSELLING Service Provider

Value Added Reseller
CITI Demo

SUSPEND DELETE

GENERAL INFO

Name: CITI Demo Alias: CITI demo

Address: Demo Account Squid

Country: Colombia State: Bogota

City: Bogota ZIP code: 90829

Tax ID: 1221212 Client ID: 0920

Email: alejandro.flores@insightlevel.com

BILLING HISTORY

#	DATE	\$	PAID
459	14 October 2017	\$ 175	<input type="checkbox"/>

PACKAGES ASSIGNMENT

Discount Group: VARs Discount

Due day: 14

Payment method: Other

Billing type: Pay as you Go

Payment type: POST-PAYMENT

Enable API access? ☒ Yes ☐ No

Enable SquidOX Marketplace? ☒ Yes ☐ No

Credit days: 10

PERMISSIONS

To manage:

- ☒ Value Added Resellers
- ☒ Resellers
- ☒ Web interface customization

ENTITIES

Show: 10 entries Search:

NAME	USED PACKAGES	TYPE
DEMOVAR1	0	Value Added Reseller
demoreseller1	0	Reseller
DEMOEC1	1	Enterprise Customer

Showing 1 to 3 of 3 entries Previous 1 Next

SAVE

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Figure 3 - Squid Entities – VAR – Edit VAR.

Suspend/Reactivate an existing VAR:

This option is used to suspend or reactivate an existing VAR. A VAR suspension means a manager can't access Squid Web admin portal interface. Furthermore, that VAR will no longer operate on Squid platform. A VAR can only be suspended if all their dependents are moved to another VAR; then, the VAR will lose all access to the Squid platform, which implies that it can't use Squid URL API, API Cart and Web admin portal anymore.

Steps to suspend a VAR account are described below:

- 1. From VAR list, search and select the VAR to be suspended.
- 2. Click on **status icon**. A confirmation window will be displayed on screen.
- 3. Click on **Suspend** to suspend the VAR or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

NOTES: Suspended VARs will appear in a different color in the VARs list, thus, a manager can easily differentiate active and suspended VARs.

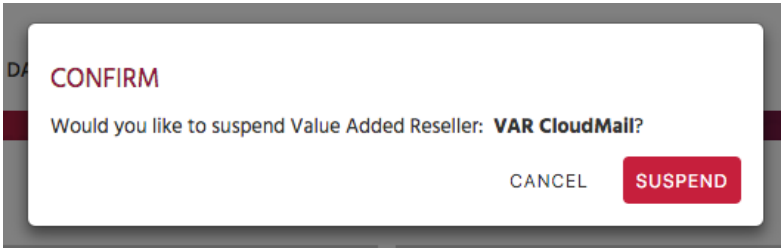


Figure 4 - Squid Entities – VAR – Suspend VAR.

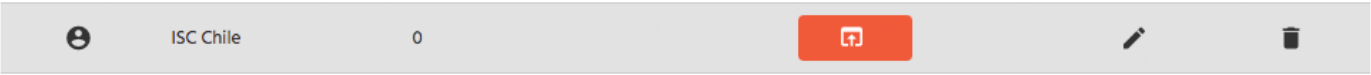


Figure 5 - Squid Entities – VAR List.

Steps to reactivate a VAR are described below:

- 1. From VAR list, search and select the VAR account required.
- 2. Click on **status icon**. A confirmation window will be displayed on screen.
- 3. Click on **Accept** to activate the VAR or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

NOTES: Suspended VARs will appear in a different color in the VARs list, thus, a manager can easily differentiate active and suspended VARs.

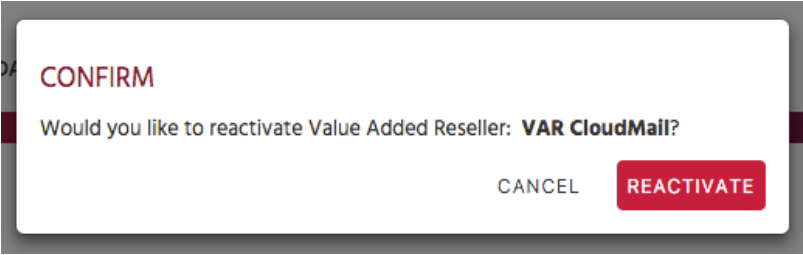


Figure 6 - Squid Entities – VAR– Activate VAR.



Figure 7 - Squid Entities – VAR List.

Delete an existing VAR:

This option is used to delete an existing VAR. A VAR can be deleted only if it has no dependents or no pending payments.

Steps to delete an existing account VAR are described below:

1. From VAR list, search and select the VAR to be deleted.
2. Click on **Delete button**. A confirmation window will be displayed on screen.
3. Click on **Delete** to delete the VAR or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

NOTE: Information from a deleted VAR will no longer exist on Squid Database, thus, it won't be possible to get information from the deleted VAR anymore.

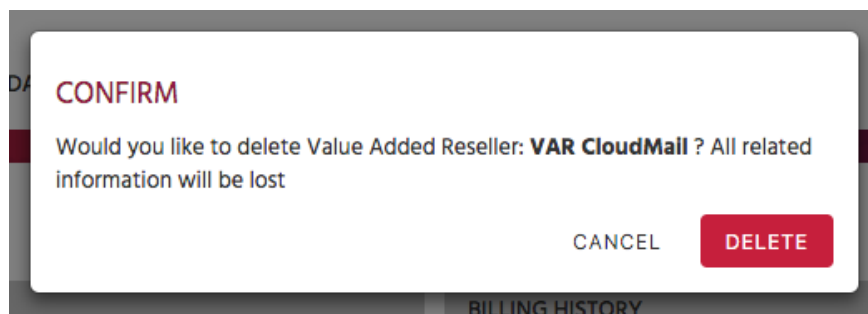


Figure 8 - Squid Catalog – VAR List – Delete VAR.

Reseller

SP

VAR

This section is used to view, create, modify and delete Reseller entities. This section can only be used by a VAR entity's manager.

Before start creating the distribution network entities, it is required to create at least one package and one discount group, these two items are mandatory to create the first Reseller on the distribution network.

In order to access this section, follow the next path: Squid Menu -> Entities -> Reseller.

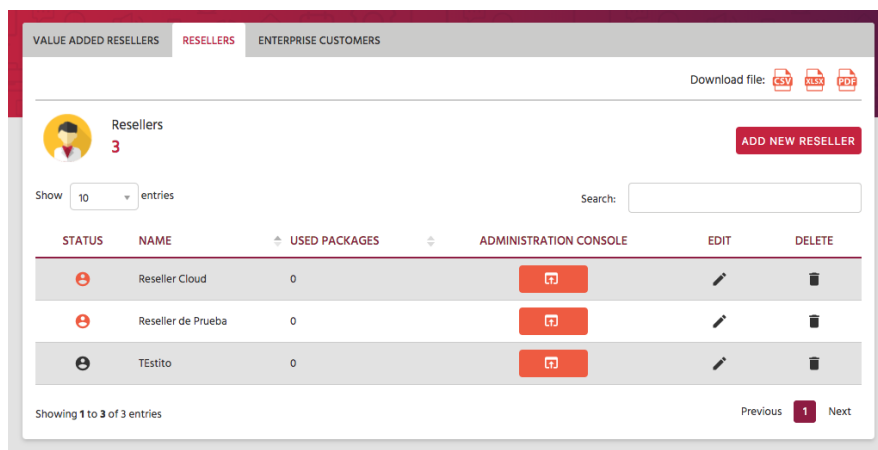


Figure 9 - Squid Entities – Reseller List

Reseller List Page has the following attributes:

Reseller table: This table shows all Resellers created by an entity manager.

Add New Reseller: This button is used to create a new Reseller.

Download:	These icon buttons are used to export the entire table information in formats like CSV, XLSX and PDF.
Show list:	This drop-down menu allows to select the number of entries to be displayed in the table.
Search:	This field is used to search an element in Reseller table, the search functionality will work as the user enters information.
Pagination buttons:	These buttons (Previous and Next) are used to change the table page.
Administration Console:	This icon button allows a VAR to impersonate the manager credentials of a selected Reseller, and it will redirect the user to a new administration page, a VAR entity can emulate a manager for a Reseller or an Enterprise Customer, and so on. In summary, "administration" button has the functionality to "login as" the manager of the selected entity.
Edit:	This icon button is used to edit an existing entity.
Delete:	This icon button is used to delete an existing entity.
Suspend/Activate:	This icon button is used to suspend or reactivate an entity.

Create a New Reseller:

Option used to create a new Reseller.

Steps to create a new Reseller are:

1. Click on **Add New Reseller** button. The manager will be redirected to a new page to complete the required information to create a new Reseller.

2. Set the following fields:

- **General Info:** This section is used to provide general information about the new Reseller.
 - *** Name:** This field is used to set a name for the new Reseller; the name must be unique.
 - *** Alias:** This field is used to set an alias name for the new Reseller. Alias name must be unique.
 - *** Address:** This field is used to define an address for the new Reseller.
 - *** Country:** This search and complete drop-down field is used to set a country for the new Reseller.
 - *** State:** This field is used to set a state for the new entity.
 - *** City:** This field is used to set a city for the new Reseller.
 - *** Zip Code:** This field is used to set a numeric Zip code for the new entity. Only numeric characters are accepted in this field.
 - *** Tax ID:** This field is used to set a Tax ID for the new Reseller.
 - *** Email:** Field used to set an e-mail address as contact information for the new account. This email will be associated with the first manager of the new account and will be used to send scheduled reports, it will also be used by the password recovery option.
 - *** Client ID:** This field is used to set the client ID of the new entity.
- **Package Management:** This section is used to define the packages to be assigned to the entity, this is an important section, the settings set here directly affect billing.
 - *** Discount group:** This drop-down box allows to assign the discount group that will be applied to the Reseller's billing.

- *** Package:** This select option is used to allow the package to be available for the Reseller to offer to its entities.
- *** API URL access:** This selectable field is used to allow access to the Squid API. This is an important feature on Squid that allows third-party software to use the functions of Squid through this channel.
- **Enable Squid Marketplace?:** This selectable field is used to allow an entity to use the functionality to provide an URL to an Enterprise Customer to use the self-registration web portal, so all customers using the link provided by the entity will be added automatically under its distribution network.
- *** Payment Method:** This drop-down box is used to set the payment method for the new Reseller, options are “Paypal” and “other”, further explanation about how this work is explained on the Billing section.
- **User Account:**
 - *** User:** This field is used to define and set the username that will be used by the entity manager.
 - *** Password:** This field has an auto-generated password for the first account manager.
 - **Generate:** This button is used for random password generation.

NOTES: Objects with “ * ” are mandatory fields.

3. Click on **Save** to create the new account Reseller or **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

Figure 10 - Squid Entities – Reseller – Add New Reseller

Edit an existing Reseller:

This option is used to edit an existing Reseller account.

Steps to edit an existing Reseller are:

1. From Reseller list, search and select the Reseller to be modified.
2. Click on **Edit Reseller** icon button. The manager will be redirected to the Reseller detail page.
3. Only next fields are available to modify:
 - **General Info:** Address, Country, State, City, Zip Code, Tax ID, e-mail, Client ID account.

- **Package Management and Payment Method:**
 - **Package:** It's allowed to add or delete packages for the entity.
 - **Payment method:** It's allowed to modify the payment method.
 - **Entities:**
 - **Hierarchical Change:** This button will redirect the entity manager to the Hierarchical Change section (this section is explained below).
4. Click on **Save** to save changes or on **Back icon** (arrow icon on the top left side of the page) to cancel the operation.

Operation results:

Success A success status window will be displayed.

Error An error status window will be displayed with details about the error.

Reseller
Reseller Cloud

SUSPEND DELETE

GENERAL INFO

Name: Reseller Cloud Alias: Reseller

Address: 221 B Baker St

Country: United Kingdom State: England

City: London ZIP code: 12931

Tax ID: CLM 0192012 Client ID: 7846387

Email: admin@cloudMail.com

BILLING HISTORY

#	ID	DATE	DEPENDENT	PAYMENT DATE	\$	PAID
Cash Out	300	09-08-2017		09-08-2017	172.90	
Cash In	301	09-08-2017	R9_Prepayment	09-08-2017	391.94	<input type="checkbox"/>
Cash Out	302	10-08-2017		10-08-2017	5,360.00	
Cash In	328	01-09-2017	R9_Prepayment	01-09-2017	.00	<input type="checkbox"/>
Cash In	338	04-09-2017	R9_Prepayment	04-09-2017	2.67	<input type="checkbox"/>

Figure 11 - Squid Entities – Reseller – Edit Reseller.

LICENSES MANAGEMENT AND PAYMENT OPTIONS

Discount Group: Package:

Enable API access? ☐ Yes ☒ No

Payment method: Enable SquidOX Marketplace? ☒ Yes ☐ No

ENTITIES HIERARCHICAL CHANGE

NAME	USED PACKAGES

SAVE

Figura 11 - Entidades Squid - Revendedor - Editar Revendedor.

Suspend/Reactivate an existing Reseller:

This option is used to suspend or reactivate an existing Reseller. A Reseller in suspended status does not allow the manager to access the Squid web admin portal interface. Furthermore, when a suspension is activated, the entity will no longer operate on Squid platform.

A Reseller can be suspended only if all its dependents are moved to another entity on the distribution network, this operation means that the Reseller will lose all access to the Squid platform, and it won't be able to use Squid URL API, API Cart and web admin portal anymore.

Steps to suspend a Reseller are:

1. From Resellers list, search and select the Reseller to be suspended.
2. Click on the **status icon**. A confirmation window will be displayed on screen.
3. Click on **Suspend** to suspend the Reseller or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

NOTE: Suspended Resellers will appear in a different color in the Resellers list, thus, a manager can easily differentiate active and suspended Resellers.

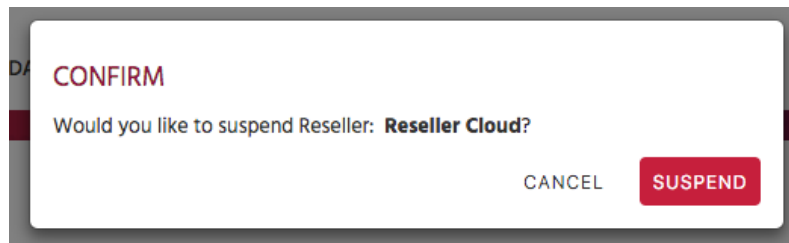


Figure 12 - Squid Entities – Reseller – Suspend Reseller.

Steps to reactivate a Reseller are:

1. From Resellers list, search and select the Reseller to be reactivated.
2. Click on the **status icon**. A confirmation window will be displayed on screen.
3. Click on **Accept** to activate the Reseller or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

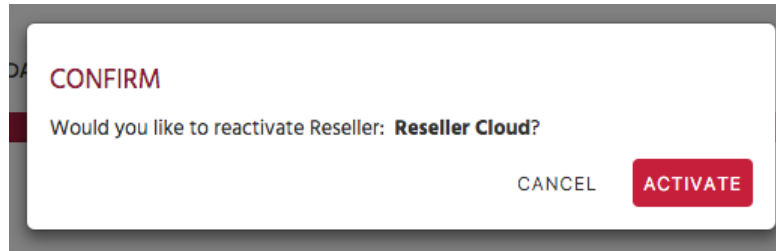


Figure 13 - Squid Entities – Reseller - Activate Reseller.

Delete an existing Reseller:

Option used to delete an existing Reseller. A Reseller can be deleted only if it has no dependents or no pending payments.

Steps to delete an existing Reseller are:

1. From Reseller list, search and select the Reseller to be deleted.
2. Click on **Delete button**. A confirmation window will be displayed on screen.
3. Click on **Delete** to delete the Reseller or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

NOTE: Information from a deleted Reseller will no longer exist on Squid Database, thus, it won't be possible to get information from the deleted Reseller anymore.

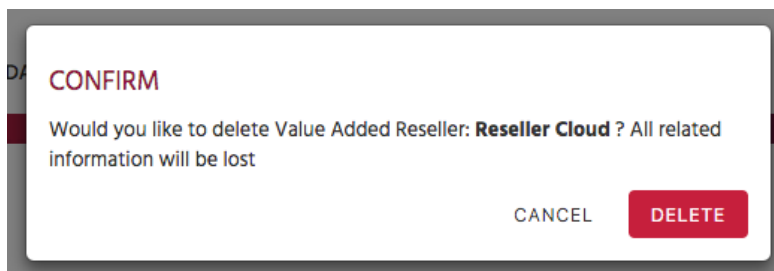


Figure 14 - Squid Catalog – Reseller List – Delete Reseller.

Hierarchical Change:

Hierarchical change is a feature available only for Service Providers or VARs. It allows a Service Provider or VAR to move all the dependents from one entity to another. Because it's a complex operation, hierarchical change has these operation rules:

- Dependents can only be moved to the same type of entity, this means dependents on a VAR that was configured as "Pays as you go" / "Post-payment" option can only be moved to another VAR that is on the same commercial scheme. The same rule applies to other VAR commercial scheme options.
- Hierarchical change will move the packages and created features by the VAR. A VAR that receives the distribution network in an automatic way, will receive all the packages, features and prices too.
- Keep in mind that a hierarchical change has a direct impact on the billing process of the parent entity, this means the next invoice from parent to dependent will include the total number of packages used by the old VAR.
- A hierarchical change can only move entities that has no pending payments, meaning this option will only allow to move VARs, Resellers or Enterprise Customers that have paid all their debts to their corresponding parent entity.

To execute a Hierarchical change, follow these required steps:

1. From VAR list, find and select a VAR that will deliver its distribution network.
2. Click on **Edit button**.
3. In the **Dependents section** at the bottom of the page, click on 'Hierarchical Change' button.

ENTITIES			HIERARCHICAL CHANGE
Show	10	entries	Search: <input type="text"/>
#	NAME	USERS	
1	Apple	4,729	
1	Atos	19,931	
1	New York Life	1,620	
1	Novell	916	
1	Polycorn	959	
1	Someware	55	
Showing 1 to 6 of 6 entries			Previous 1 Next

4. On the Hierarchical change page, select a VAR that will receive the dependents on the left side.

Admin 4

HOME ENTITIES CATALOG DASHBOARDS BILLING UPSELLING

Administrator

Var

← Hierarchical Change

Select the most compatible VAR for the entities.

VAR

CloudMail

This VAR has 5 packages and accepts paypal payments.

VAR

Choose VAR...

5. Select the dependents (VAR's, Resellers and Enterprise Customers) you want to change. Press the **SELECT ALL button** if you want to change all the dependents.

DEPENDENTS REMOVE ALL

VARs	RESELLER	ENTERPRISE CUSTOMER
<input checked="" type="checkbox"/> Atos <input checked="" type="checkbox"/> Novell <input checked="" type="checkbox"/> Polycom	<input checked="" type="checkbox"/> New York Life	<input checked="" type="checkbox"/> Apple <input checked="" type="checkbox"/> Someware

- Press the button **CONTINUE**. A confirmation with a summary of the operation will be displayed on screen.

Squid Admin Administrator

HOME **ENTITIES** CATALOG DASHBOARDS BILLING UPSELLING

Var
Hierarchical Change Confirmation
 All these entities on the Hierarchical CloudMail will be changed to NewMailCloud.

VAR CloudMail → VAR NewMailCloud

ENTITIES

VAR
Novell

Reseller
New York Life

Enterprise Customer
Someware

Commercial Changes

You need to create two (2) New Packages and accept payment via PayPal

CANCEL CHANGE

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- Press the button **Change** to finish or **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

NOTES:

- Keep in mind that a hierarchical change has impact on Squid billing operations, before doing this operation, an in-depth analysis of the operation and its impacts is recommended.
- In summary, the impacts are:
 - The VAR that receives the dependents will now have to invoice all dependents.
 - The VAR that receives the dependents will now receive an invoice about all these packages from the parent.
 - Squid handles all the operations in an automatic way, but it's better to understand this operation before proceeding.

Enterprise Customer

SP

VAR

RESELLER

This section is used for viewing, creating, modifying and deleting Enterprise Customer entities. It can only be used by VAR and Reseller entities managers.

In order to access this subsection, follow the next path: Squid Menu -> Entities -> Enterprise Customer.

VALUE ADDED RESELLERSRESELLERSENTERPRISE CUSTOMERS

Download file:CSVXLSXPDF

Enterprise Customers10

ADD NEW ENTERPRISE CUSTOMER

Show10entriesSearch:

STATUS	NAME	USED PACKAGES	ADMINISTRATION CONSOLE	EDIT	DELETE
	Abstergo Industry	0			
	Aperture	2			
	EC1	0			
	Martinez Cota	0			
	Pre_Ec1	0			
	Pre_ec02	0			
	Portal	0			
	r9_ec	0			
	r9_ec3	0			
	Self	0			

Showing 1 to 10 of 10 entriesPrevious1Next

Figure 15 - Squid Entities – Enterprise Customers List.

Enterprise Customers List Page has the following attributes:

Enterprise Customer table:	This table list all Enterprise Customers created by an entity manager.
Add New Enterprise Customer:	This button is used to create a new Enterprise Customer.
Download:	These icon buttons are used to export the entire table information in formats like CSV, XLSX and PDF.
Show list:	This drop-down menu allows to select the number of entries to be displayed in the table.
Search:	This field is used to search an element in Reseller table, the search functionality will work as the user enters information.

Pagination buttons:

These buttons (Previous and Next) are used to change the page of the table.

Administration Console:

This icon button allows a VAR or Reseller to impersonate the manager credentials of the Enterprise Customer selected, and will redirect the user to a new administration page, a VAR or Reseller entity can emulate a manager of an Enterprise Customer. In summary administration button has the functionality to “login as” the manager of the entity selected.

Edit:

This icon button is used to edit an existing entity.

Delete:

This icon button is used to delete an existing entity.

Suspend/Activate:

This icon button is used to suspend or reactivate an entity.

Create a New Enterprise Customer:

Option used to create a new Enterprise Customer.

Steps to create a new Enterprise Customer are:

1. Click on **New Enterprise Customer** button. The manager is redirected to a new page to complete the information to create a new Reseller.
2. Enter information in the following fields:
 - **General Info:** This section is used to provide general information about the new Enterprise Customer.
 - *** Name:** Field to set a name for the new Enterprise Customer; the name must be unique.

- * **Alias:** Field to set an alias name for the new Enterprise Customer. Alias name must be unique.
 - * **Address:** Field used to define an address for the new Enterprise Customer.
 - * **Country:** Drop-down field to set a country for the new Enterprise Customer.
 - * **State:** Field used to set a state for the new entity.
 - * **City:** Field used to set a city for the new Enterprise Customer.
 - * **Zip Code:** Field to set a numeric Zip code for the new entity. Only numeric characters are accepted in this field.
 - * **Tax ID:** Field to set a Tax ID for the new Enterprise Customer.
 - * **Email:** This field is used to set an e-mail address as contact information for the new account. It will be associated with the first manager of the new account and will be used to send scheduled reports.
 - * **Client ID:** Sets the client ID of the new entity.
 - * **Domain:** This field is used to define the e-mail domain to be used by the mailboxes of the Enterprise Customer.
 - * **Due Day:** Defines the day that corresponds to the date generated for the billing receipt templates for the Enterprise Customer.
- **Package Assignment:** This section is used to define the packages to be assigned to an entity, this is an important section, the settings set here directly affect billing.
 - * **Package:** This drop-down box allows selecting a package to be assigned to the Enterprise Customer. All packages listed here are related to packages previously created on the Package section.
 - * **Price:** This input field allows setting a price for the package to be assigned, it's important to mention that the price set here will be displayed on the billing receipt for the Enterprise Customer.

- *** Quantity:** This input field allows to set the number of packages to be assigned to the Enterprise Customer, this has a direct impact on the billing invoice because the number set here will be used to calculate the VAR invoice.
- *** Unlimited:** This field is only available for “Pay as you go” billing type Enterprise Customers, basically it allows to use an unlimited number of packages or, in other words, “pay for what you use”. For “Pay per contract” billing type Enterprise Customers this option won’t be available.
- **Add:** This icon button is used to add different types of packages to the Enterprise Customer.

NOTE: Package Assignment section define the commercial billing to apply to the entity.

- **Payment Method:**

- *** Payment Method:** This drop-down box is used to set the payment method for the new Enterprise Customer, options are “Paypal” and “other”, further explanation about how this work is explained on the Billing section.
- *** Credit Days:** This field is used to set the numbers of “Credit Days” that an Enterprise Customer will have after the due date, before his account is suspended. Since this has an impact on the Billing section, further details are explained on that section. Keep in mind that credit days’ field is only available for Post-Payment option.

- **Permissions:**

- **Web Interface Customization:** This permission allows the entity’s manager to change the look and feel of the Squid web admin portal interface, limited to Logo change and color change.

- **Administrator Console Access:** This permission allows the entity's manager to add more managers and set permissions to them.
- **User Account:**
 - *** User:** This field is used to define and set the username for the entity's manager.
 - *** Password:** This field has an auto-generated password for the first account manager.




NOTES: Objects with “*” are mandatory fields.

3. Click on **Save** to create the new Enterprise Customer or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

NOTES: Resellers and Enterprise Customers inherit the commercial business model from its parent entity (a VAR), this means, if the parent is on a business model “Per Contract – Prepaid”, all the entities on that distribution network will use the same business commercial model.

Squid  R9_Prepayment administration console   Admin


HOME ENTITIES CATALOG DASHBOARDS BILLING UPSELLING


← ADD NEW ENTERPRISE CUSTOMER

GENERAL INFO

Name	<input type="text"/>	Alias	<input type="text"/>
Address	<input type="text"/>		
Country	<input type="text" value="Select"/>	State	<input type="text"/>
City	<input type="text"/>	ZIP code	<input type="text"/>
Tax ID	<input type="text"/>	Email	<input type="text"/>
Client ID	<input type="text"/>	Domain	<input type="text"/>
Due day	<input type="text"/>		

PACKAGES ASSIGNMENT

Package	<input type="text" value="Select"/>	Price	<input type="text" value="0"/>	Quantity	<input type="text"/>	
---------	-------------------------------------	-------	--------------------------------	----------	----------------------	---

 Add new

PAYMENT OPTIONS

Payment method

PERMISSIONS

☐ Web interface customization

☐ Administrator console access

USER ACCOUNT

User Password GENERATE

CANCEL SAVE

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Figure 16 - Squid Entities – Add New Enterprise Customer.

Edit an existing Enterprise Customer:

This option is used to edit an existing Enterprise Customer.


Steps to edit an existing Enterprise Customer account are:

1. From Enterprise Customer list, search and select the Enterprise Customer to be modified.

2. Click on **Edit icon**. The manager will be redirected to the Enterprise Customer detail page.
3. Only the next fields are available to modify:
 - **General Info:** Address, Country, State, City, Zip Code, Tax ID, E-mail, Client ID account.
 - **Package assignment:** It's allowed to add new packages to the entity.
 - **Payment Method:** It's allowed to change the payment method.
 - **Permissions:** Web Interface Customization, Administrator Support.
 - **Packages:** This section is only displayed when editing the data process of an Enterprise Customer. It contains a table with the different types and number of packages assigned to the entity. The elements that can be modified are:
 - **Number of Packages:** This number can be increased or decreased, which means that more packages are added or removed from the billing receipt, keep in mind that packages can only be decreased if they are not assigned to Resellers or Enterprise Customers.
4. Click on **Save** to save changes or on **Cancel** icon to cancel the edition.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.


R9_Prepayment administration console
Admin

[HOME](#)
[ENTITIES](#)
[CATALOG](#)
[DASHBOARDS](#)
[BILLING](#)
[UPSELLING](#)

Enterprise Customer

← EC1Prepay

SUSPEND

DELETE

2 Users

GENERAL INFO

Name

EC1Prepay

Alias

EC1Prepay

Address

221 Baker St.

Country

Mexico

State

NL

City

MTY

ZIP code

9992

Tax ID

EC1PREPAY090201

Client ID

9

Due day

5

Domain

demo2.io

Email

ec.prepay@cloudmail.com

BILLING HISTORY

#	DATE	\$	PAID
301	09-08-2017	\$ 391.94	<input type="checkbox"/> <div>▶</div> <div>⬇</div>

PACKAGES ASSIGNMENT

Package

Select

Price

0

Quantity

0

ⓧ

+

Add new

PAYMENT OPTIONS

Payment method

Other

PERMISSIONS

☒ Web interface customization

☒ Administrator console access

PACKAGES

NAME	USED PACKAGES	STORAGE	PRICE	CREATED	# ASSIGNED	DETAIL	DELETE
BasicWebMail	0	5 GB	8.00	Aug 9, 2017	40	👁	ⓧ
StorageMail	1	10 GB	12.00	Aug 9, 2017	10	👁	ⓧ
CollaborationSuite	2	15 GB	18.00	Aug 9, 2017	5	👁	ⓧ
A new, package	0	10 GB	15.00	Nov 2, 2017	2	👁	ⓧ

CANCEL

SAVE

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Figure 17 - Squid Entities – Enterprise Customer – Edit Enterprise Customer.

Suspend/Activate an existing Enterprise Customer:

This option is used to suspend or reactivate an existing Enterprise Customer. A suspension means the manager can't access Squid web admin portal interface. Furthermore, a suspension means this entity will no longer operate on Squid platform and all its mailbox accounts on the Open-Xchange App Suite will be disabled.

Steps to suspend an Enterprise Customer are:

1. From Enterprise Customer list, search and select the Enterprise Customer to be suspended.
2. Click on **status icon**. A confirmation window will be displayed on screen.
3. Click on **Suspend** to suspend the Enterprise Customer or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

NOTE: Suspended Enterprise Customers will appear in a different color in the Enterprise Customers list, thus, a manager can easily differentiate active and suspended Enterprise Customers.

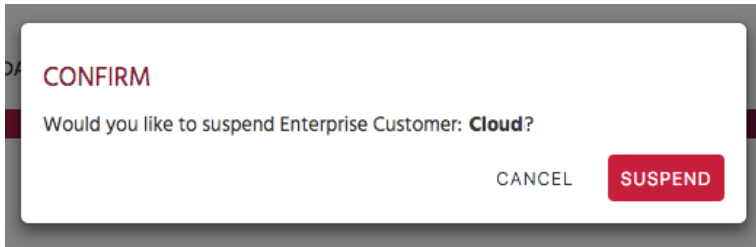


Figure 18 - Squid Entities – Enterprise Customer – Suspend Enterprise Customer



Figure 19 – Squid Entities – EC List.

Steps to reactivate an Enterprise Customer are:

- 1. From Enterprise Customers list, search and select the Enterprise Customer to be reactivated.
- 2. Click on **status icon**. A confirmation window will be displayed on screen.
- 3. Click on **Accept** to activate the account or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

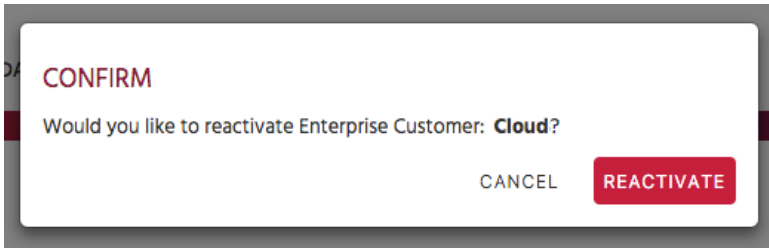


Figure 20 - Squid Entities – Enterprise Customer – Activate Enterprise Customer



Figure 21 – Squid Entities – EC List.

Delete an existing Enterprise Customer:

This option is used to delete an existing Enterprise Customer.

Steps to delete an existing Enterprise Customer are:

- 1. From Enterprise Customers list, search and select the Enterprise Customer to be deleted.
- 2. Click on **Delete button**. A confirmation window will be displayed on screen.
- 3. Click on **Delete** to delete the Enterprise Customer or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

NOTE: Information from a deleted Enterprise Customer will no longer exist on Squid Database; thus, it won't be possible to get information from the deleted Enterprise Customer. Furthermore, once the Enterprise Customer is deleted, all related settings in the Open-Xchange App Suite will be deleted as well; such as mailboxes, distribution lists, or any other resource that belongs to the context of this Enterprise Customer.

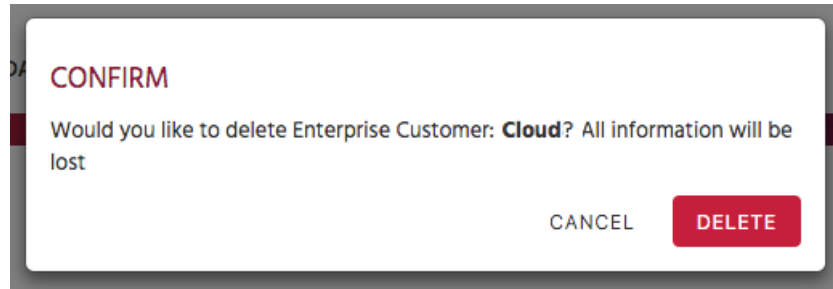


Figure 20 - Squid Catalog – Enterprise Customer List – Delete Enterprise Customer.



Entities for Enterprise Customers

- Entities for Enterprise Customers
- Users
- Groups
- Resources
- Distribution Lists

Entities for Enterprise Customers

EC

Entities for Enterprise Customer is the web interface used for creating, editing, deleting, suspending and re-activating users (mailboxes), groups and resources for the Open-Xchange App Suite platform and distribution lists for the Postfix Message Transfer Agent (SMTP/MTA Server).

This section is only available for Enterprise Customer entities. Value Added Resellers and Resellers can also have access to it, but only through the “Administration Console” button located in its own interface (using the “login as” Squid feature).

The Entities section in an Enterprise Customer menu has these subsections:

Users

EC

This section is used to view, create, modify, suspend/reactivate and delete Users for the Enterprise Customer Entity.

The users are provisioned in the Open-Xchange App SuitePlatform and each user consumes a package assigned from the parent entity in Squid.

In order to access this section, follow the next path: Home Page -> Entities -> Users.

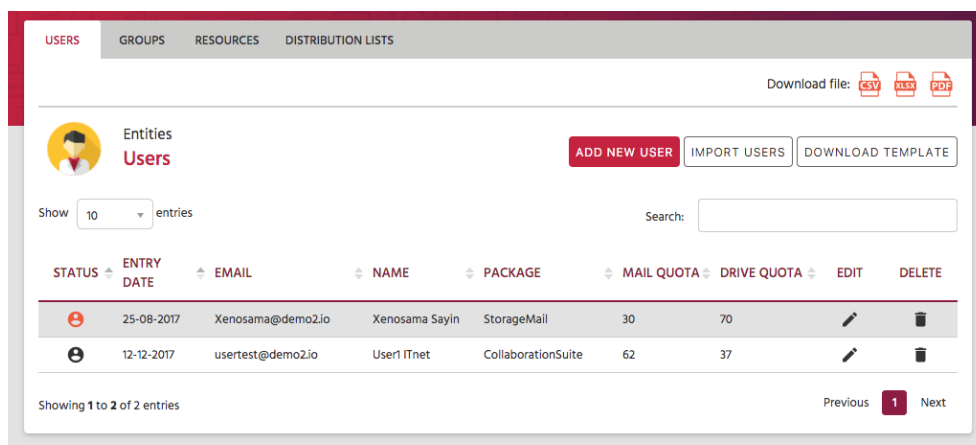


Figure 1 - Squid Entities – Users List.

Users List Page has the following attributes:

Users table:

Lists all users provisioned by the Enterprise Customer in the Open-Xchange's platform, this means, each user is a mailbox assigned to a package in Squid.

Add User:

This button is used to create a new user mailbox in the Open-Xchange Platform.

Download:

These Buttons are used to export the entire users list table to a specific format file, supported formats are: CSV, XLSX and PDF.

Show list:

This drop-down box allows to select the number of entries to be displayed per page on the table.

Search field:

This field is used to search an element in the users table, the search functionality will work as the user enters information.

Pagination buttons:

These buttons (Previous and Next) are used to change the table page.

Email:	This field displays the e-mail address of the user mailbox created in the Open-Xchange App Suite Platform.
Name column:	This field displays the full name of the user mailbox created in the Open-Xchange platform.
Package:	This field displays the package assigned to the user mailbox, this defines the functionalities that the user will have enabled in the Open-Xchange App Suite platform.
Mail Quota:	This field shows the percentage (%) quota of the storage package assigned to the user mailbox on Open-Xchange.
Drive Quota:	This field shows the percentage (%) quota of storage package assigned to the user drive storage on Open-Xchange.
Edit:	This icon button is used to edit an existing user mailbox.
Delete:	This icon button is used to delete an existing user mailbox.
Suspend/Activate:	This icon button is used to suspend or activate an existing user account.

Create a New User:

This option is used to create a new user:

Steps to create a new user are:

1. Click on **Add User**. A window will be displayed to enter information.
2. Enter data in the following fields:
 - *** E-mail:** This field is used to set a username for the e-mail account in the Open-Xchange Platform, please note that "domain" is a read only field, this is because it takes the domain from the Enterprise Customer settings.

- *** Password:** This field is used to set a password for the e-mail account that will be created on the Open-Xchange Platform. The password is auto-generated by Squid, but the manager can change it.
- *** First Name:** This field is used to set a First Name for the e-mail account, this First Name is mapped to the First Name in Open-Xchange database.
- *** Last Name:** This field is used to set the Last Name for the e-mail account, this Last Name is mapped to the Last Name in the Open-Xchange database.
- *** Choose an available package for the user account,** the package list displays the packages assigned by the parent entity available to use.
- *** Choose user account status:** This radio button option allows to define if the user will be active or suspended, by default the account will be active.
- **Alias:** This field is used to set aliases for the e-mail account for the Open-Xchange App Suite.
- **Groups:** This field displays the groups where the users belong, this field can be used to remove the user from a group.
- **Storage:** This is a configurable bar used to set the storage distribution between e-mail and drive, the distribution is configured in percentage (%) of usage. If the bar is moved to the left, less percentage (%) will be used for e-mail and more for storage. If the bar is moved to the right, more storage will be used for e-mail and less for storage.

3. Review all the information and click on **Save** to create the new user account or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

NOTES: Fields with “*” are required.

The screenshot shows a 'CREATE NEW USER' form with the following fields and options:

- Email:** A text input field with a dropdown menu showing '@somewhere.com'.
- Password:** A text input field containing 'ZJh46735s'.
- First Name:** A text input field.
- Last Name:** A text input field.
- Package:** A dropdown menu with 'Select...' as the current selection.
- Status:** Two radio buttons: 'Active' (selected) and 'Disabled'.
- Alias:** A text input field with a placeholder 'Split aliases by comma'.
- Groups:** Two checkboxes: 'Group Sales' and 'Group Marketing'.
- Storage:** A slider control with a red bar and a black dot. The slider is positioned between '30% Mail' and '70% Drive'.
- Buttons:** 'CANCEL' and 'SAVE' buttons at the bottom right.

Figure 2 - Squid Entities – Users – Create New User.

Edit an existing User:

This option is used to edit an existing user account, also from a user edition is possible to modify the user account password.

It is also possible to change a user from one package to another, this operation has different behaviors based on the Enterprise Customer commercial scheme in Squid.

In a “Per Contract Pre-paid” or “Post-paid” scenario, while the Enterprise Customer has assigned packages available (not used by an user’s mailbox), the user account can be moved from one package to another and there will be no impact on billing for the Enterprise Customer.

In a “Pay as you Go” or “Post-paid” scenario, when the user is moved from one package to another, there will be an impact on the billing; this is because in this scenario Squid calculates the billing based on the usage of the mailbox through time. For example:

If an Enterprise Customer has packages assigned to users’s maiboxes), once an e-mail account is moved from package 1 to package 2, Squid will do the calculations of mailbox usage and will show an invoice with details of two charges. First charge will be for package 1, from the last due-date until the date when the change was done; the second charge will be for package 2, from the date of the change until the next due date.

Steps to edit a user are:

1. From Users List, search and select the user e-mail address to modify.
2. Click on **edit icon**. A window screen will be displayed.
3. Change the information needed. If a password reset is required, just press over **Generate button** to generate a new random password.
4. Review all information and click on **Save** to save changes or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

EDIT USER

Email: john_snow @somewhere.com

Password: ZJh46735s

First Name: John

Last Name: Snow

Package: Package 2

Status: ☒ Active ☐ Disabled

Alias: Alias1, Alias2

Groups: ☒ Group Sales ☐ Group Marketing

Split aliases by comma

Storage: 40% Mail ————— 60% Drive

CANCEL SAVE

Figure 3 - Squid Entities – Users – Edit User.

Delete an existing User:

This option is used to delete an existing user e-mail address or mailbox from the Open-Xchange App Suite platform.

Keep in mind that if a user is deleted, the user's mailbox will no longer be available to access Open-Xchange App Suite platform, but information of the account will remain stored on the filesystem of the Open-Xchange App Suite platform. The time of data retention depends on the configuration set by the Service Provider in the general configuration settings of Squid. A user can have two behaviors depending on the Enterprise Customer commercial scheme.

For “Per Contract” – “Pre-paid” or “Post-paid” scenarios, if the Enterprise Customer has assigned available packages, it will be able to move the user from one package to another freely, and there will be no impact on the billing.

For “Pay as you go” – “Post-paid” scenario, if the Enterprise Customer has assigned available packages, once it moves the user from one package to another, there will be an impact on the billing. Squid will invoice the details of two charges; first charge will be for package 1, from the last due-date until the date when the change was done; the second charge will be for package 2, from the date when the change was done until the due date.

Steps to delete an existing user are:

1. From Users List, search and select the e-mail address to be deleted.
2. Click on **delete icon**. A window screen will be displayed.
3. Click on **Delete** to delete the e-mail account or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

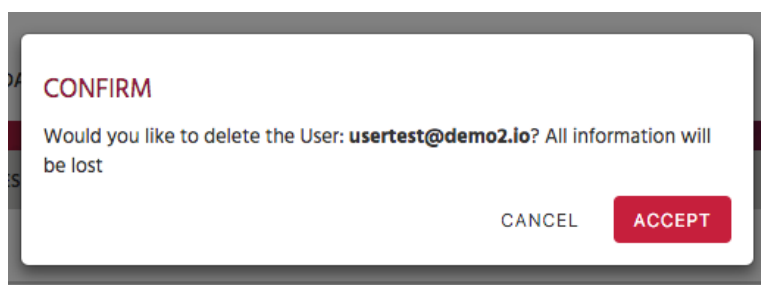


Figure 4 - Squid Entities – Users – Modal Confirm - Delete User.

Suspend/Activate an existing User:

This option is used to suspend or reactivate an existing e-mail account.

Suspended users will not be able to access the Open-Xchange App Suite Platform.

The suspension of a user account doesn't have any impact on billing. A suspended account will still be assigned to a package and will continue to have all his data in the Open-Xchange App Suite storage.

Steps to suspend an e-mail account are:

1. From Users List, search and select the e-mail account to be suspended.
2. Click on the **status icon**. A window screen will be displayed.
3. Click on **Accept** to suspend the e-mail account or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

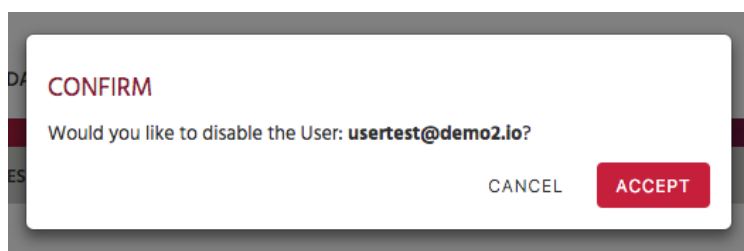


Figure 5 - Squid Entities – Users – Modal Confirm - Suspend User.

	Nov 22, 2016	monica.geller@somewhere.com	Monica Geller	Package 2	10 GB	2 GB		
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Steps to reactivate an e-mail account are:

1. From Users List, search and select the e-mail account to be reactivated.
2. Click on the **status icon**. A window screen will be displayed.
3. Click on **Accept** to reactivate the e-mail account or on **Cancel** to cancel the operation.

Operation results:

Success A success status window will be displayed.

Error An error status window will be displayed with details about the error.

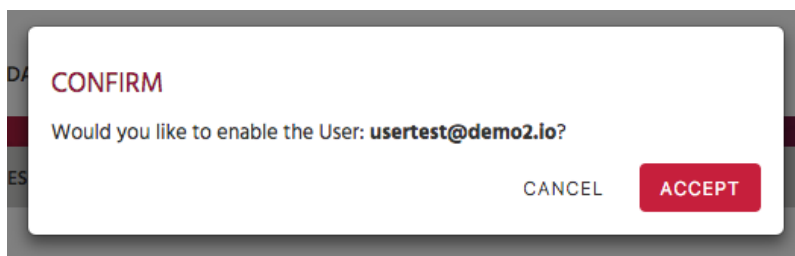




Figure 6 - Squid Settings – Managers – Activate Manager.

	Nov 22, 2016	monica.geller@somewhere.com	Monica Geller	Package 2	10 GB	2 GB		
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Groups

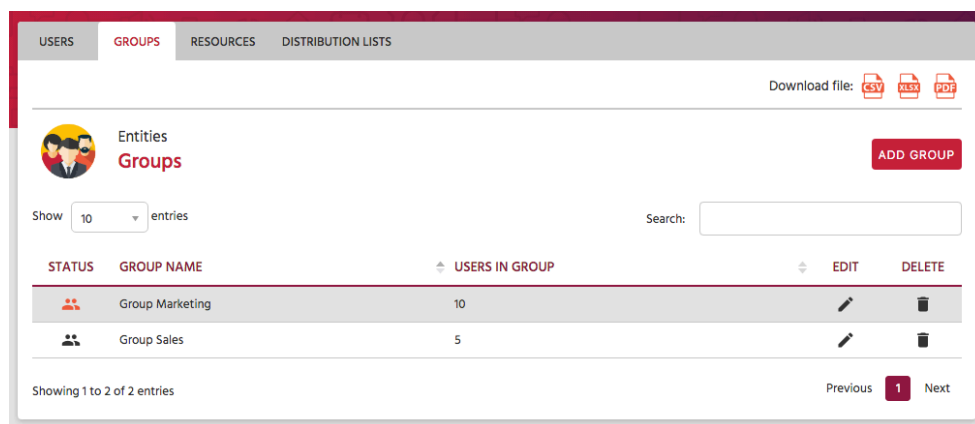
EC

This section is used to view, create, modify, suspend/reactivate and delete Open-Xchange groups. Open-Xchange groups are internal groups that can be used in several options in App Suite.

Only Open-Xchange e-mail users can be added to these groups. Groups in App Suite are used for:

- Send a mail.
- Set an appointment with users in the calendar.
- Share documents in Drive.

In order to access this section, follow the next path: Home Page -> Entities -> Groups.









STATUS	GROUP NAME	USERS IN GROUP	EDIT	DELETE
	Group Marketing	10		
	Group Sales	5		

Figure 7 - Squid Entities – Groups List.

Groups list page has the following attributes:

Groups table:

This table lists all groups created by the Enterprise Customer manager.

Add Group:	This button is used to create a new group in Open-Xchange App Suite.
Download file:	These buttons are used to export the entire groups list to a file, the supported formats are CSV, XLSX and PDF.
Show:	This drop-down box allows to choose the number of entries to display on the table per page.
Search:	This field is used to search an element in the groups table, the search functionality will work as the user enters information on it.
Pagination buttons:	These buttons (Previous and Next) are used to change the table page.
Group Name:	This field displays the Group name.
Users in Group:	This field displays the number of users belonging to the group.
Edit:	This icon button is used to edit an existing group.
Delete:	This icon button is used to delete an existing group.
Suspend/Activate:	This icon button is used to suspend or reactivate an existing group.

Create a New Group:

This option is used to create a new group in Open-Xchange App Suite platform.

Steps to create a new group are:

1. Click on **Add group**. A window screen will be displayed.
2. Enter information in the following fields:
 - *** Name:** This field is used to set the group name.
 - *** Description:** This field is used to add the description of the new group.
3. Add available users from “Available Users” box to “Users in Group” box.
4. Review all the information and click on **Save** to create the new group or on **Cancel** to cancel the operation.

Operation results:

Success A success status window will be displayed.

Error An error status window will be displayed with details about the error.

NOTES: Fields with “*” are required.

ADD NEW GROUP

Name

Description

Available users

Users in Group

dave.grohl@somewhere.com

taylor.hawkins@somewhere.com

pat.smeat@somewhere.com

chris.shiflett@somewhere.com

CANCEL SAVE

Figure 8 - Squid Entities – Groups – Create New Group modal.

Edit an existing Group:

This option is used to edit an existing group.

Steps to edit a group are:

1. From Groups List, search and select the group to be modified.
2. Click on **edit icon**. A window screen will be displayed.
3. Change the information needed. Group name can't be changed.
4. Review all information and click on **Save** to save changes or on **Cancel** to cancel the operation.

Operation results:

Success A success status window will be displayed.

Error An error status window will be displayed with details about the error.

EDIT GROUP

Name
Group Marketing

Description
Group dedicated to the marketing and UX area

Available users

- dave.grohl@somewhere.com
- taylor.hawkins@somewhere.com
- nate.mandel@somewhere.com

Users in Group

- pat.smear@somewhere.com
- chris.shiflett@somewhere.com

CANCEL SAVE

Figure 9 - Squid Entities – Groups – Edit Group.

Delete an existing Group:

This option is used to delete an existing group.

Steps to delete an existing group are:

1. From Groups List, search and select the group to be deleted.
2. Click on **delete icon**. A window screen will be displayed.
3. Click on **Delete** to delete the group or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

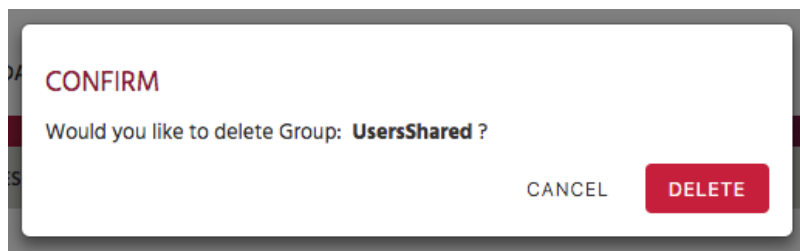


Figure 10 - Squid Entities – Groups – Modal Confirm - Delete Group.

Suspend/Activate an existing Group:

This option is used to suspend an existing group. A suspended group will be unavailable in Open-Xchange.

Steps to suspend a group are:

1. From Groups List, search and select the group to be suspended.

2. Click on **status icon**. A window screen will be displayed.
3. Click on **Suspend** to suspend the group or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

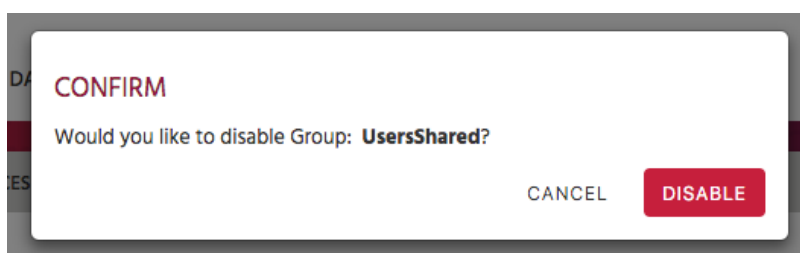


Figure 11 - Squid Entities – Groups – Modal Confirm - Suspend Group.

	Marketing Group	10		
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Steps to reactivate a group are:

1. From Groups list, search and select the group to be reactivated.
2. Click on **status icon**. A window screen will be displayed.
3. Click on **Activate** to re-activate the group or **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

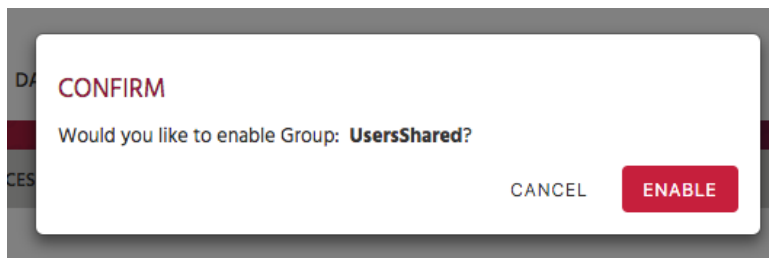





Figure 12 - Squid Entities – Groups – Modal Confirm - Activate Group.

	Marketing Group	10		
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Resources

EC

This section is used to view, create, modify, suspend/reactivate and delete Open-Xchange resources.

Open-Xchange Resources are items that can be used in Open-Xchange Calendar. In order to access this section, follow the next path: Home Page -> Entities -> Resources.

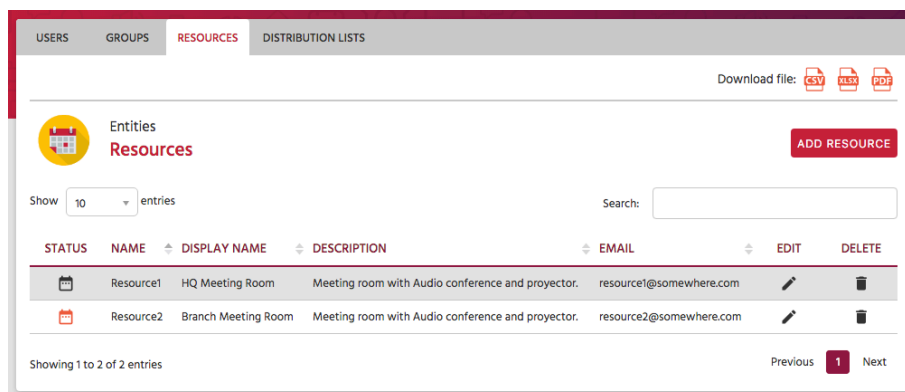


Figure 13 - Squid Entities – Resources List.

Resources List page has the following attributes:

Resources table:	This table lists all the resources created by the Enterprise Customer manager.
Add Resource:	This button is used to create a new resource in Open-Xchange.
Download buttons:	These buttons are used to export the entire table information to a file in a specified format, supported formats are CSV, XLSX and PDF.
Show:	This drop-down box allows to set the number of entries to be displayed on the table.
Search:	This field is used to search an element in the table, search functionality will work as the user enters information.
Pagination buttons:	These buttons (Previous and Next) are used to change the table page.
Name:	This field displays the resource name.
Display Name:	This field shows the Resource name displayed in Open-Xchange App suite directory.
Description:	This field displays the Resource description.
Email:	This field displays the reference e-mail used for the resource.
Edit:	This icon button is used to edit an existing resource.
Delete:	This icon button is used to delete an existing resource.
Suspend/Activate:	This icon button is used to suspend or activate an existing resource.

Create a New Resource:

This option is used to create a new resource.

Steps to create a new resource are:

1. Click on **Add Resource**. A window screen will be displayed.
2. Enter information in the following fields:
 - **Name:** This field is used to set a name for the new resource.
 - **Display Name:** This field is used to set a “display name” for the new resource.
 - **e-mail:** This field is used to set an e-mail reference for the new resource.
 - *** Status:** This radio button selection is used to choose either “Yes” or “No” for the resource status.
 - *** Description:** This field is used to set a description for the new group.
3. Review all information and click on **Save** to create the new resource or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

NOTES: Fields with “*” are required.

A screenshot of a web application modal titled "ADD RESOURCE" with a close button (X) in the top right corner. The form contains several input fields: "Name" (a single-line text box), "Display name" (a single-line text box), "Email" (a single-line text box with a dropdown menu showing "@somewhere.com"), "Enable?" (radio buttons for "Yes" and "No", with "Yes" selected), and "Description" (a multi-line text area). At the bottom right of the modal are two buttons: "CANCEL" and "SAVE".

Figure 14 - Squid Entities – Resources – Create New Resource modal.

Edit an existing Resource:

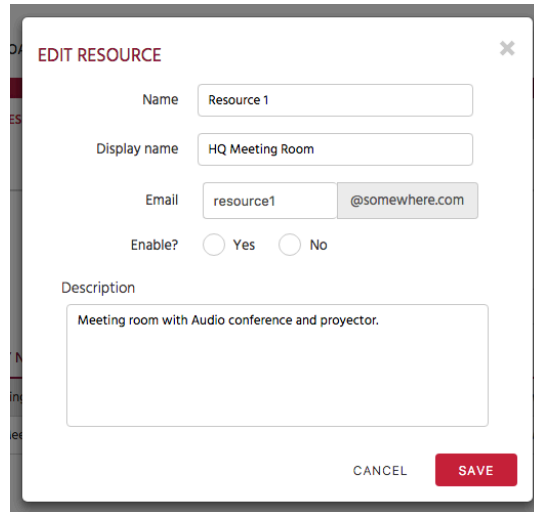
This option is used to edit an existing resource.

Steps to edit a resource are:

- 1. From Resources List, search and select the resource to be edited.
- 2. Click on **edit icon**. A window screen will be displayed.
- 3. Change the information required.
- 4. Review all information and click on **Save** to save changes or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.



EDIT RESOURCE

Name: Resource 1

Display name: HQ Meeting Room

Email: resource1 @somewhere.com

Enable? ☒ Yes ☐ No

Description: Meeting room with Audio conference and projector.

CANCEL SAVE

Figure 15 - Squid Entities – Resources – Edit Resource.

Delete an existing Resource:

This option is used to delete an existing resource.

Steps to delete an existing resource are:

1. From Resources list, search and select the resource to be deleted.
2. Click on **delete icon**. A window screen will be displayed.
3. Click on **Delete** to delete that resource or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
----------------	--

Error	An error status window will be displayed with details about the error.
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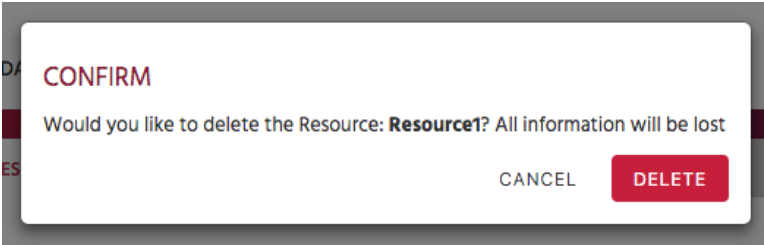


Figure 16 - Squid Entities – Resources – Confirm - Delete Resource.

Suspend/Activate an existing Resource:

This option is used to suspend or reactivate an existing resource.

Steps to suspend a resource are:

- 1. From Resources list, search and select the resource to be suspended.
- 2. Click on **status icon**. A window screen will be displayed.
- 3. Click on **Continue** to suspend the resource or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

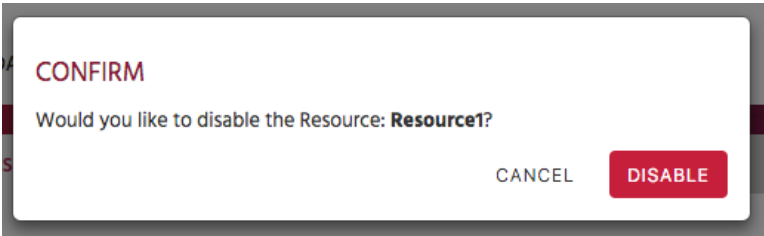


Figure 17 - Squid Entities – Resources – Modal Confirm - Suspend Resource.

	Resource1	HQ Meeting Room	Meeting room with Audio conference and projector.	resource1@somewhere.com		
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Steps to reactivate a resource are:

1. From Resources list, search and select the resource to be reactivated.
2. Click on **status icon**. A window screen will be displayed.
3. Click on **Activate** to reactivate the resource or on **Cancel** to cancel the operation.

Operation results:

Success A success status window will be displayed.

Error An error status window will be displayed with details about the error.

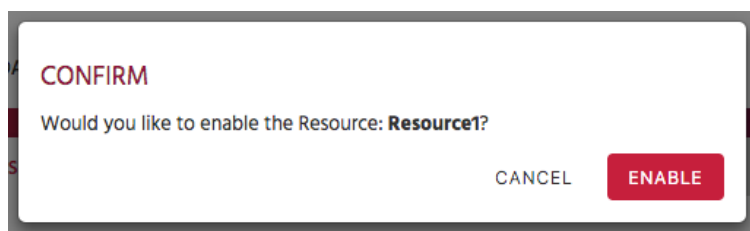
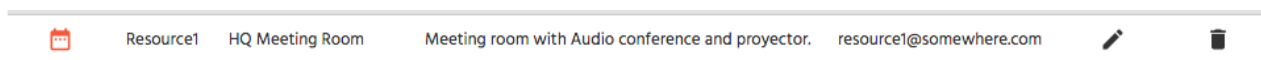


Figure 18 - Squid Entities – Resources – Modal Confirm - Activate Resource.



Distribution Lists

EC

Distribution lists are attributes of the integration to Postfix as MTA in the Open-Xchange App suite platform from Squid.

A distribution list is a resource that allows an Enterprise Customer to build specific e-mail alias to receive and distribute messages among several e-mail users. This is useful because a distribution list doesn't require a package assignation.

Distribution lists usually are used for common department e-mail addresses, for instance, a distribution list named **sales@domain.com** can contain all the e-mail addresses of account managers, thus, when an e-mail is received by **sales@domain.com**, the e-mail will be automatically distributed among all the e-mail addresses configured in this distribution list.

This section is only functional and available if Postfix is fully integrated to the Open-Xchange App suite platform, if Open-Xchange App suite deployment uses other MTA, then this section will not be functional in Squid.

This section is used to view, create, modify and delete Distribution Lists for the Postfix MTA.

In order to access this section follow the next path: Home Page -> Entities -> Distribution Lists.

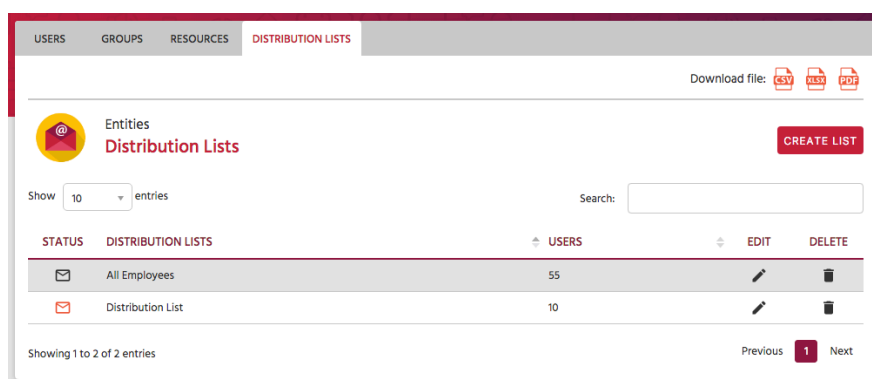


Figure 19 - Squid Entities – Distribution Lists.

Distribution Lists page has the following attributes:

Distribution Lists table:

This table lists all distribution lists created by the Enterprise Customer.

Add New List:	This button is used to create a new distribution list in the Postfix MTA server.
Download file:	These buttons are used to export the entire distribution list table to a file in different formats, the supported formats are CSV, XLSX and PDF.
Show:	This drop-down box allows to select the number of entries to be displayed on the distribution list table.
Search:	This field is used to search an element in resources table, the search functionality will work as the user enters information.
Pagination buttons:	These buttons (Previous and Next) are used to change the table page.
Distribution Lists:	This field displays the e-mail address of the distribution list.
Users:	This field counts the total number of users in the distribution list.
Edit:	This button is used to edit an existing distribution list.
Delete:	This button is used to delete an existing distribution list.



Create a New Distribution List:

This option is used to create a new distribution list.

Steps to create a new distribution list are:

1. Click on **Create New List button**. A window screen will be displayed.
2. Enter information in the following fields:

- *** E-mail:** This field is used to set the e-mail address of the distribution list, the e-mail that will receive the messages.

1. Between the selection boxes, use the icons  to move available users from the left box to the right box, in order to include them in the distribution list. Use the icons  to move the added users from the right box to the left box, in order to remove them from the distribution list.
2. Review all information and click on **Save** to create the new distribution list or on **Cancel** to cancel the operation.

Operation results:

Success A success status window will be displayed.

Error An error status window will be displayed with details about the error.

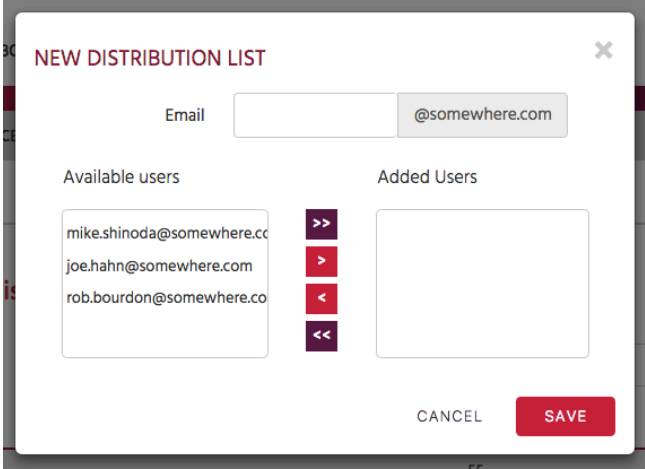




Figure 20 - Squid Entities – Distribution Lists – Create New Distribution List modal.

Edit an existing Distribution List:

This option is used to edit an existing distribution list.

Steps to edit a distribution list are:

1. From Distribution Lists table, search and select the distribution list to be modified.
2. Click on edit icon. A window screen will be displayed.
3. Using the icons  and  to move the users from one box to another to add or remove them from the distribution list.
4. Review all information and click on **Save** to save changes or on **Cancel** to cancel the operation.

Operation results:

Success A success status window will be displayed.

Error An error status window will be displayed with details about the error.

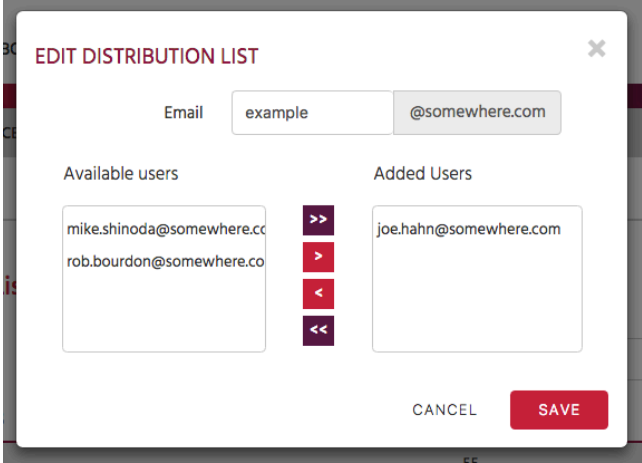


Figure 21 - Squid Entities – Distribution Lists – Edit Distribution lists.

Delete an existing Distribution List:

This option is used to delete an existing distribution.

Steps to delete an existing distribution list are:

1. From Distribution Lists table, search and select the distribution list to be deleted.
2. Click on **delete icon**. A window screen will be displayed.
3. Click on **Delete** to delete that distribution list or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

NOTES:

- **BE CAREFUL!** When a distribution list is deleted, the e-mail address used to distribute messages will no longer work, this means that applications or contact information will receive an SMTP protocol error.
- E-mail accounts that belonged to the distribution list will not be affected, this means e-mail users will continue receiving messages in their original e-mail addresses.

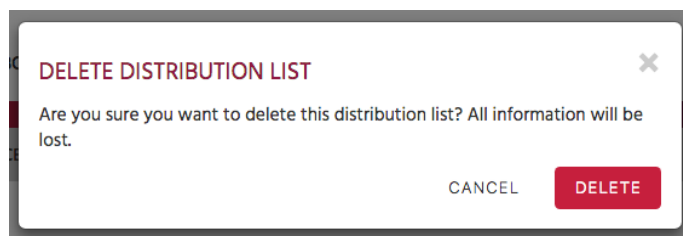


Figure 22 - Squid Entities – Distribution Lists – Modal Confirm - Delete Distribution List.



Billing

- Billing
- Discount Group Tiers behavior in billing
- Invoices
- Historical data
- Scheduled Notifications
- Receipt Template

Billing

SP

VAR

RESELLER

EC

Billing is the CORE business of Squid and the most complex section of the platform because all parameters configured for each entity in the distribution network define how the billing will work.

In this section, it is possible to set payments that were already made, reviewing history of received payments, viewing details of generated receipts and generating mail alerts for direct dependents.

Before starting to explain how billing works, let's begin with some concept definitions about items handled in Billing section.

- **Receipt:** Payment receipt is a digital document that is sent to the entity (VAR, Reseller or Enterprise Customer) on its due date, and appears in the Squid Billing section. This document is automatically generated on the entity's due date or in a new purchase event.
- **Events:** Events managed by Squid are purchases and cancellations for billing operations:

Purchase events happen when:

- On a "Pay per Contract" option:
 - A new entity and a package are added, or a group of packages are assigned to them.
 - There is a change on the number of packages when an entity is edited (VAR or Enterprise Customer).

- When the Squid mini Marketplace is used to provision Enterprise Customers and packages.
 - When a third-party interface uses Squid API to provision a VAR, Reseller or Enterprise Customers and packages.
 - When a VAR approves an upselling request done by an Enterprise Customer.
- On a “Pay as you Go” option
 - When a mailbox is provisioned in the Open-Xchange App Suite by the Enterprise Customer.
 - When an Enterprise Customer changes a mailbox from one package to another.

Cancellations happen when:

- On a “Pay per Contract” option:
 - The number of packages assigned are modified (to a lower number) in the entity edition operation.
 - When an entity deletes a package from an Enterprise Customer.
 - When an entity deletes an entire Enterprise Customer (this deletion includes all the packages assigned and mailboxes belonging to that entity on the Open-Xchange platform).
- On a “Pay as you Go” option:
 - When an entity (VAR or Enterprise Customer) deletes a mailbox from the Open-Xchange App Suite.
 - When an entity (VAR or Reseller) deletes an Enterprise Customer from the Open-Xchange platform (this delete operation includes all the mailboxes belonging to that entity).

- **Billing Commercial Options:** Billing options are commercial rules that define the way the distribution network will operate and control the distribution of packages and provisioning of mailboxes in the Open-Xchange platform, the three options available in Squid are:
 - **“Pay as you Go – Post-Payment”:** On this commercial option, invoices to entities are generated based on the number of mailboxes provisioned by Squid, and used in the Open-Xchange platform. It doesn't matter if the mailbox is locked, suspended or active; only deleted mailboxes are considered not to be included in the billing.
 - **“Pay per Contract – Post-Payment” and “Pay per Contract – Pre-Payment”:** On these commercial options, invoices are generated based on the number of packages assigned to the entity by its parent. It doesn't matter if the mailbox is active, suspended or deleted, this mode considers committed packages and not usage.

NOTES: Calculation for invoices in Squid Billing will be explained further.

Billing Business Operation Rules:

- Service Provider defines the operation mode for each VAR. VARs can only have one operation mode and could be inherit to their entire distribution network (VARs, Resellers and Enterprise Customers).
- VARs can't change from one operation mode to a different one, so if a distributor, partner or customer needs to operate on different modes, it will be mandatory to create a second entity with the required operation mode.
- Billing processes can't be mixed, so a VAR with a “Pay as you Go” operation mode will only have dependents (VARs, Resellers and Enterprise Customers) with the same operation mode.

- The due date for each entity will not be able to be set after the 28th day, that is, a due date can be set from day 1 to day 28, regardless of the month.
- Billing applies discount tiers only to VARs and to Resellers, but not to Enterprise Customers (discount calculations are explained further).
- Discount Tiers applies once the VAR or Reseller has reached the initial range configured, and the next discount tier will be applied once the next initial range number is reached.
- Entities that have configured PayPal as its payment method, as long as it is properly configured, billing is capable to handle the automatic charge to this payment method.
- Squid handles the calculations for assigned or used packages per day, and all the calculations are based using a monthly charge.

Billing operations scenarios:

PURCHASES

- a. Entity with a “Pay per Contract” – “Pre-payment” configuration:
 - On a Pre-payment scenario, an invoice is generated on demand; because for each purchase made, an invoice is generated and sent.
 - Calculations are made using the due date of the entity, thus, calculations are made considering the current date and counting the days until the defined due date, this means the Pre-payment days, so the invoice will display details about the packages purchased, the price per day of the package, total of days charged, extended price per package, and if applicable, the applied discount.
 - If PayPal is configured as payment method, Squid will execute the payment operation to the PayPal account defined. If there is a successful operation, the invoice will be displayed on the Billing section as “paid”. If there is no successful operation, a notification will be sent to the parent and child entities, and the invoice will be displayed as “not paid” on the Billing section. Squid billing will schedule a daily retry to PayPal until the entity’s defined due date is reached.

- If one of the retries to charge PayPal the payment is successful, the status will be changed in the Billing section to “paid” and a notification will be sent to the entities. A notification is sent for each time Squid retries to charge PayPal.
- If another payment method is configured, Squid will only show the invoice in the billing interface as “not paid” and the entity must mark manually the invoice as “paid” when applicable.
- If the entity requests changes on the assigned packages (increase the number of packages), a different invoice will be generated for those new packages, and calculations will be made in another batch process.
- When the due date is reached, a new invoice will be generated; now with the total number of packages and the total days until the next monthly cycle.

b. Entity with “Pay per Contract” – “Post-payment” configuration:

- On this scenario, the invoice for the entity is generated until the defined due date is reached.
- Calculations are made in the same way as the previous scenario, the packages assigned to the entity are counted, thus, the invoice will detail the usage days for each package since the day they were assigned until the due date, when the invoice is created.
- The main differences are:
 - Payments are not immediately executed; they are executed on the due date + credit days’ limit. This means, once the invoice is created on the due date, the payment will be triggered until the credit limit days are reached.
 - The payment status for the invoice has the same logic as the previous scenario; this is, if PayPal is configured as the payment method, an automatic charge process will start on the due date + credit limit days, and will continue daily if the charge fails.

This will stop until the charge is successful or until the entity's manager mark the invoice as "paid" on the Billing section. Notifications will be sent after each automatic attempt to charge PayPal.

- Same as the previous configuration; if another payment method is configured, Squid will only display the invoice on the billing interface as "not paid", in this scenario, notifications will be sent daily until the entity's manager mark the invoice as "paid" manually.
- Changes on package assignments are recorded, and each package usage will be shown in detail on the invoice generated on the due date.

For both configurations, it doesn't matter if the mailbox is created, suspended, reactivated or deleted in the Open-Xchange platform; because the invoice will show the payment based on a committed package purchased, not on the provisioned users. In "Contract" scenarios, the customer can change a mailbox from one package to another and this will not trigger a billing event.

c. Entity with "Pay as you Go" – "Post-payment" configuration:

- In this scenario, the invoice is generated on the entity's due date.
- Calculations are still made per day, but in a different way; because now the days counted are based on the mailbox usage. The calculations consider the date when the mailbox is created or deleted on Open-Xchange App suite, and the defined due date for the entity.
- The invoice will display the number of packages, the number of active days of the package (date when the mailbox is provisioned until the entity's due date), the extended price, and a discount if applicable.
- The payment method logic will work in the same way as the previous scenarios; and because it is a "Post-payment" scenario, this option will also use the credit days parameter to start the notifications and an automatic PayPal charge process.

To summarize:

Per Contract – Pre-payment scenario:

Counts the packages assigned to the entity, and bill the “pre-payment” days of use until the due date. Invoices are generated per each transaction, payment charges are processed immediately and this commercial scheme doesn’t handle credit days, so notifications start immediately.

Per Contract – Post-payment scenario:

Counts the packages assigned to the entity, and bill the days of usage since the package was assigned until the entity’s due date. Invoices are generated once a month, and payments are processed until the due date + credit days defined for the entity are reached, notifications will start after due date + credit limit days are reached.

Pay as you go – Post-payment scenario:

Counts the mailboxes provisioned in the Open-Xchange App suite platform, bill the days of usage since the mailbox is created until the defined due date of the entity, or when the mailbox is deleted. An invoice is generated monthly and payments are processed until the due date + credit limit days are reached.

NOTES:

- If a VAR or Reseller manually suspends an Enterprise Customer; the invoicing, notification and automatic payment charge processes are not stopped; these operations will stop until the Enterprise Customer is deleted.
- Deleting an Enterprise Customer does NOT delete its billing history.

CANCELLATIONS

Cancellation operations also have impact on the billing.

The cancellation process will work as follows:

a. For the “Per Contract” – “Post-payment” and “Pre-payment” scenarios:

In this scenario, Squid will only allow to cancel packages that haven't been assigned to a mailbox. Only packages assigned to entities that are not being used by mailboxes can be cancelled.

For example:

1. A VAR assigns 10 packages to an Enterprise Customer.
2. The Enterprise Customer provisions those 10 packages to users;
3. then, the Enterprise Customer deletes a mailbox, releasing the package assigned to that mailbox. Deleting the mailbox does NOT mean the cancellation of the package, and for Billing, it continues to count as the package assigned to the Enterprise Customer.
4. Afterwards, the Enterprise Customer asks its parent entity to perform a cancellation package request,
5. the parent entity then edit the Enterprise Customer and reduce the number of packages assigned to the Enterprise Customer.
6. This is when the billing is affected, thus, on the next monthly billing invoice, the calculation will show a detail of the packages usage and it will not charge the days since the package was canceled until the due date.
7. In this scenario, it doesn't matter if the customer moves the mailbox account from one package to another; finally, the invoice will count all the assigned packages to the entity.

b. For “Pay as you Go” – “Post-payment” scenario:

The process is different in this scenario, because the billing is charged based on the provisioned mailboxes.

A cancellation can occur when an Enterprise Customer deletes a mailbox, and the next billing invoice generated on the due date, will show the details about the usage of the package based on the mailbox usage.

NOTES: In this scenario, if the mailbox is suspended, it still counts for the invoice, it's until the mailbox is deleted (no more resources are used on the Open-Xchange App Suite), when the billing takes consideration of the cancellation operation.

Discount Group Tiers behavior in billing

SP

VAR

RESELLER

EC

Discount group tiers have direct impact on the invoice generated, the impact is on the total discount applied to the invoice. The discount is only applied to invoices generated for VARs and Resellers. A discount for a VAR is a payment discount applied by its parent entity. A discount for a Reseller is the commission payment that it will receive from its parent entity.

Because discount tiers can be applied on ranges defined for different percentage (%) discounts, the calculation for these discounts will depend on the total number of assigned or provisioned packages on the invoice generation.

Discount group calculations for purchases

The discount calculation is described below.

a. "Per Contract" – "Prepaid" Scenario

Because in this scenario invoices are generated per transaction, Squid handles the count of the total number of acquired packages, and applies the discount for the total sum assigned packages.

For example:

An entity has a discount group assigned with these parameters:

Initial Range	Final range	% Discount applied
100	500	5 %
501	5,000	7 %
5,001	80,000	10 %

In this example, the VAR acquires 50 packages; because the minimum range is not reached, the discount won't be applied in this invoice.

Now, let's assume the VAR acquires 50 more packages and the total sum of packages reaches the initial range; the next invoice will show a 5% discount, but only for those 50 packages.

If the due date is reached, a new invoice will be generated, and now the 5% discount will be applied to all 100 packages (total of packages acquired).

Assume the VAR acquires another 405 packages, the next invoice will count the total number of packages and will apply a 7 % discount, but only for the 405 new packages. If the due date is reached and no more sales were generated, then the VAR will receive a monthly invoice on his due date for 605 packages with a 7% discount.

b. “Per Contract” – “Post-Payment” scenario

In this scenario, there is only one invoice generated per month. When the invoice is generated, the discount will be applied.

Continuing with the previous example; the same discount group is used. A VAR acquires 90 packages, and then acquires 50 more packages before its due date; because the invoice is generated on its due date, the total number of packages will be 140, thus, a 5% discount will be applied to the total amount of the invoice.

c. “Pay as you Go” – “Post-payment” scenario

Here is only one invoice generated per month. The invoice counts the total number of packages provisioned on the Open-Xchange App suite platform, thus, the discount is applied on the total number of packages used when the invoice is generated, and it follows the same rules applied on the “Per Contract” – “Post-Payment” scenario.

Discount group calculations for cancellations

Cancellation also has an impact on how the discounts are calculated. The same rules apply with the same scenarios; finally, the discount is calculated with the total sum of the packages assigned (for “Per contract” scenarios) or provisioned (for “Pay as you Go” scenario).

To summarize:

- “Pay Per Contract” – “Pre-payment” scenario: discount is applied per invoice, but considering the total number of packages assigned, so if a cancellation is made, the total number of packages will only count to apply the discount tier.
- “Pay Per Contract” – “Post-Payment”: discount is applied on the invoice generated, if a cancellation is made, only the total number of packages assigned on the due date will count for the discount tier.
- “Pay as you Go” – “Post-Payment”: discount is applied on the packages assigned to mailboxes in the Open-Xchange platform; on this scenario, only the total number of mailboxes provisioned will be considered for the discount tier.

Invoices

SP

VAR

RESELLER

EC

CASH-IN:

In this section, the entity can review cash-in operations. Cash-in operations are invoices generated by the entity to its dependents, this is the money that the entity needs to collect from its dependents.

In this section, payments made by dependents are controlled, in an automatic or a manual way. In order to access this section, follow the next path: Squid Menu -> Billing -> Invoices.

Billing

Download file:

search...

CASH IN

#	ISSUE DATE	ENTITY	\$	PAID	DOWNLOAD	RESEND	DETAIL
300	09 August 2017	R9_Prepayment	\$ 172.90	<input type="checkbox"/>			
302	10 August 2017	R9_Prepayment	\$ 5,360.00	<input type="checkbox"/>			
303	10 August 2017	R8_Postpayment	\$ 206.45	<input type="checkbox"/>			
304	10 August 2017	R8_Postpayment	\$ 0.00	<input type="checkbox"/>			
305	10 August 2017	R8_Postpayment	\$ 258.06	<input type="checkbox"/>			
313	16 August 2017	Martinez Cota	\$ 0.00	<input type="checkbox"/>			
317	16 August 2017	Var_Dev	\$ 64.52	<input type="checkbox"/>			
327	28 August 2017	Var_Dev	\$ 838.71	<input type="checkbox"/>			
334	04 September 2017	Abstergo Industry	\$ 19.84	<input type="checkbox"/>			
342	05 September 2017	ISC Chile	\$ 0.00	<input type="checkbox"/>			

Previous 1 2 3 4 5 6 7 Next

SAVE

Figure 1 - Invoices Payments table.

The table above shows the following information:

- **# Payment ID:** It is an identifier for the generated invoice.
- **Issue Date:** Date when the payment receipt was generated.
- **Entity:** Entity name (dependent) which money needs to be collected from.
- **\$:** The total amount of the invoice receipt, this amount includes the discount applied.
- **Paid:** This box is very important and it is used to know if an invoice was paid. If the payment is made through PayPal, this box will be displayed. If the payment is made by another method, this field must be selected manually once the payment has been made. Keep in mind, once the payment is marked as "paid" the status cannot be changed.
- **Download:** This link button is used to download a payment receipt in PDF format.
- **Resend:** this icon button is used to send the invoice receipt in PDF format by email. When the user clicks on the button, a popup window will be displayed; where the user can enter one or more emails to send the payment receipt.
- **Detail:** This icon button is used to view the invoice receipt details; when the user clicks on it, a window with the payment receipt details will appear.

CASH-OUT:

In this section, the entity can review cash-out operations, this section is only available for VAR entities.

Cash-out operations are invoices generated by a parent entity, referring to the money the entity needs to pay to its parent in the distribution network, or the money the entity need to pay to reseller for commissions.

In this section, the payments made to the parent entity are controlled, in an automatic or a manual way.

CASH OUT								
#	ISSUE DATE	DISTRIBUTION NETWORK PARENT	\$	PAY	DOWNLOAD	RESEND	DETAIL	
#307	16-08-2017	CloudMail	\$1,230.00	PAY	↓	➤	🔍	
#309	16-08-2017	Net Provider	\$1,500.00	PAY	↓	➤	🔍	
#313	16-08-2017	Indie Reseller	\$950.00	PAY	↓	➤	🔍	

Figure 2 - Receipt Payments list - Cash Out.

The table above shows the following information:

- **# Payment ID:** It is the invoice identifier.
- **Issue Date:** Date when the payment receipt was generated.
- **Distribution Network Entity:** Entity name (parent) charging the billing.
- **\$ Payment amount:** the total amount of the invoice receipt, this amount includes the discount applied (only for VARs).
- **Pay:** this is an action button, if the payment method has been configured to use PayPal, this button redirects to a window where the payment can be made through the PayPal interface. Otherwise, the data is displayed to make the payment manually.


- **Download:** This link button is used to download a payment receipt in PDF format.
- **Resend:** this icon button is used to send the invoice receipt in PDF format by email. When the user clicks on the button, a popup window will be displayed; where the user can enter one or more emails to send the payment receipt.
- **Detail:** This icon button is used to view the invoice receipt details; when the user clicks on it, a window with the payment receipt details will appear.

Download a payment receipt:

Steps to download a payment receipt in PDF format:

1. From the search list, select a payment receipt to download.
2. Click on **Download** icon button (inside list of payment receipts).
3. Select where to save the receipt.

Receipt
#473



Billing date:	02-11-2017
Due day:	10

Customer Details

1 R9_Prepayment
alejandro.flores@ctli.com.mx

Quantity	Description	Unit price	Days charged	Extended price	Percentage commission	Commission
10	BasicWebMail	\$ 0.50	30	\$ 150.00	10%	\$ 15.00
Total:						\$ 15.00

Terms & Conditions

Please add here your terms and conditions for this receipt

Please add here information related to your enterprise or contact info or any other information required in the receipt

Figure 3 - Invoice Receipt payment example.

NOTES: Invoice receipts can be customized per each entity in the distribution network, i.e.: logo, terms & conditions can be modified. Changes are allowed only if the entity has inherited this permission.

Resend a payment receipt:

This option is used to send a payment receipt in real time.

Steps to send a receipt are:

1. From the table, select a payment receipt to resend.
2. Click on the **Resend icon** (in the list of payment receipts).
3. A popup window will appear to enter one or more e-mail addresses where the payment receipt will be sent.
4. Once e-mails addresses were set, click on the **Send button**.

NOTES: The template is sent in HTML format as part of the mail body and as attachment in PDF format.

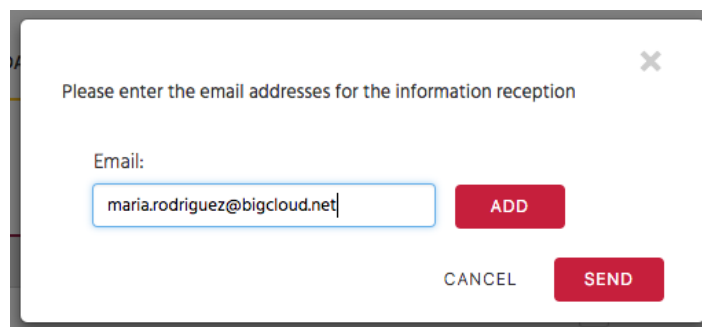


Figure 4 - Popup window to enter e-mails to send the payment receipt.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

Payment receipt details:

This option is used to see the detail of a payment receipt on the web browser.

Steps to view the payment details are:

1. From the receipts table, search and select a payment receipt.
2. Click on **Detail icon** (inside the list of payment receipts).
3. A new window with details about the payment will be displayed.

NOTES: The template is sent in HTML format as part of the mail body and as attachment in PDF format.

Squid R9_Prepayment administration console Admin

HOME ENTITIES CATALOG DASHBOARDS BILLING UPSSELLING

Receipt detail
 ← Auto billing by commissions generate period: 02/11
 DOWNLOAD

Date: 02-11-2017

Receipt
 #473

Billing date: 02-11-2017
Due day: 10

Customer Details
 1 R9_Prepayment
 alejandro.flores@citi.com.mx

Quantity	Description	Unit price	Days charged	Extended price	Percentage commission	Commission
10	BasicWebMail	\$ 0.50	30	\$ 150.00	10%	\$ 15.00
Total:						\$ 15.00

Terms & Conditions
 Please add here your terms and conditions for this receipt

Please add here information related to your enterprise or contact info or any other information required in the receipt

BACK DOWNLOAD

2017 © All rights reserved | INSIGHTLEVEL

Figure 5 - Example of receipt template (HTML).

Historical data

SP

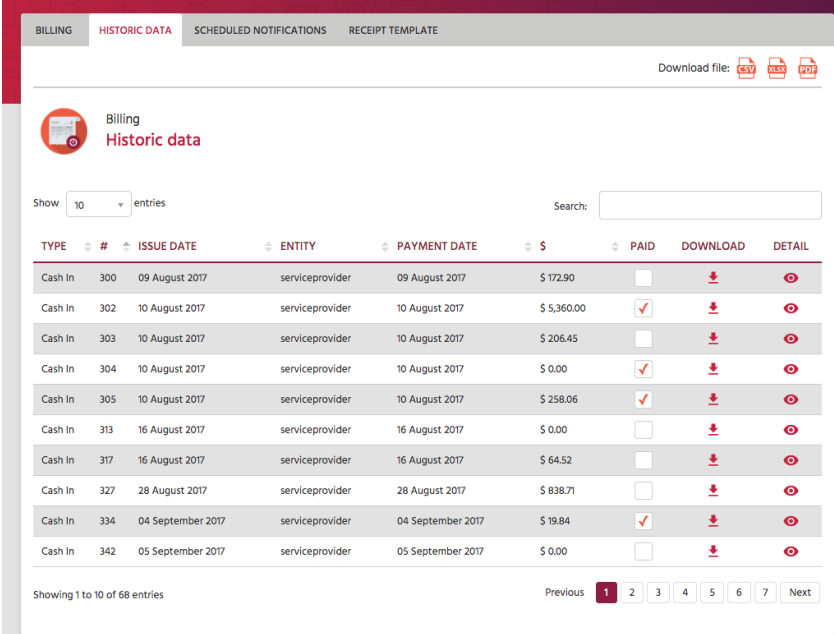
VAR

RESELLER

EC

This section is used to view the historical payment data as well as the details of each of them. Historical data shown has a dependency based on the parameters selected in the main Squid configuration settings.

In order to access this section, follow the next path: Squid Menu -> Billing -> Historic Data.



The screenshot shows the 'Billing Historic data' section of a web application. It features a table with columns: TYPE, #, ISSUE DATE, ENTITY, PAYMENT DATE, \$, PAID, DOWNLOAD, and DETAIL. The table lists 10 entries of 'Cash In' payments from 'serviceprovider' entities, dated between August and September 2017. Each row includes a 'PAID' checkbox (some checked, some empty), a 'DOWNLOAD' icon (red arrow), and a 'DETAIL' icon (red eye). The interface also includes a search bar, a 'Show 10 entries' dropdown, and a pagination bar at the bottom showing 'Showing 1 to 10 of 68 entries'.

TYPE	#	ISSUE DATE	ENTITY	PAYMENT DATE	\$	PAID	DOWNLOAD	DETAIL
Cash In	300	09 August 2017	serviceprovider	09 August 2017	\$ 172.90	<input type="checkbox"/>		
Cash In	302	10 August 2017	serviceprovider	10 August 2017	\$ 5,360.00	<input checked="" type="checkbox"/>		
Cash In	303	10 August 2017	serviceprovider	10 August 2017	\$ 206.45	<input type="checkbox"/>		
Cash In	304	10 August 2017	serviceprovider	10 August 2017	\$ 0.00	<input checked="" type="checkbox"/>		
Cash In	305	10 August 2017	serviceprovider	10 August 2017	\$ 258.06	<input checked="" type="checkbox"/>		
Cash In	313	16 August 2017	serviceprovider	16 August 2017	\$ 0.00	<input type="checkbox"/>		
Cash In	317	16 August 2017	serviceprovider	16 August 2017	\$ 64.52	<input type="checkbox"/>		
Cash In	327	28 August 2017	serviceprovider	28 August 2017	\$ 838.71	<input type="checkbox"/>		
Cash In	334	04 September 2017	serviceprovider	04 September 2017	\$ 19.84	<input checked="" type="checkbox"/>		
Cash In	342	05 September 2017	serviceprovider	05 September 2017	\$ 0.00	<input type="checkbox"/>		

Figure 6 - Invoices Receipts for payment Historic Data.

Historic data table shows the following information:

- **# Payment ID:** It's an identifier of the generated invoice.
- **Issue Date:** Date when the payment receipt was generated.
- **Distribution Network Entity:** Entity name (dependent) which money needs to be collected from.

- **Payment Date:** Shows the date when the payment was done in an automatic way (if the entity has PayPal option enabled) or the payment was marked as “paid” by the parent entity.
- **\$ Payment amount:** The total amount of the invoice receipt, this amount includes the discount applied.
- **Download:** This link button is used to download a payment receipt in PDF format.
- **Detail:** This icon button is used to view the invoice receipt details, when clicked, a window with the payment receipt details in html will be displayed.

NOTES: Historical data is filled month by month; this means, on each entity’s due date all the invoices are moved from “Invoices table” to “Historical data table”.

Scheduled Notifications

SP

VAR

Scheduled notifications is an important feature that work based on the due date and credit days, which are set for each entity in the distribution network. They use e-mail as communication way.

In this section, an entity can configure as many notifications as required. There are 3 types of notifications used, which are described below.

- **Payment reminders:** They are used to send a friendly reminder to an entity about the invoice. This notification can be configured to be sent before a due date.
- **Late payment reminders:** These notifications are used to send a reminder about a payment failure or pending payments for an entity. This notification is configured to be sent after the due date, only if the payment has failed or has not been made.
- **Suspension notifications:** These notifications are configured to be sent after the due date + credit days limit, this notification is a reminder to let know an entity there is a problem with the payment, therefore, that account will be suspended.

In order to access this section; follow the next path: Squid Menu -> Billing - > Scheduled Notifications.

STATUS	NAME	SCHEDULE	EDIT	DELETE
	Big Alert 1	1 day before due date at 10:00 am		
	Mail Alert All 5	2 days after due date at 10:00 am		
	Mail type 1	5 days before due date at 09:30 am		
	Mail type 3	5 days after due date at 10:30 am		
	SP Alert All	5 days before due date at 09:30 am		
	SP Alert All 2	2 days after due date at 10:00 am		
	VARs Alert All	1 day after due date at 11:00 am		
	VARs Late Payment	4 days before due date at 12:00 pm		
	VARs Late Payment 2	1 day after due date at 12:00 pm		

Figure 7 - Scheduled notifications list.

This section will show the following information:

- **Status:** This is an e-mail icon that indicates if the notification is enabled or disabled. There are different colors used to identify an active notification from the suspended notification.
- **Name:** This field will show the notification name.
- **Schedule:** This field will show the time set for the notification execution.
- **Edit:** This icon button is used to edit the notification.
- **Delete:** this icon button is used to delete the notification.

Create Notification:

Follow these steps to create a new scheduled notification:

1. Go to: Squid Menu -> Billing -> Scheduled Notifications -> **Button Create notification.**

A new screen will be displayed containing tags that can be used to drag and drop on the left window over the e-mail body field.

The tags shown on the left side are:

E-mail tags:

- **Account name:** This tag shows the name of the entity that will receive the notification; this could be a VAR, Reseller or Enterprise Customer name.
- **Current date:** This tag shows the date when the notification is sent.
- **Billing date:** This tag shows the generation date of the payment receipt.
- **Missing day:** This tag shows the days remaining until the receiver entity's due date.
- **Days late:** This tag shows the payment delay days after the due date.
- **Payment amount:** This tag shows the total amount of the payment receipt, for VARs, it includes the applied discount.

E-MAIL CONTENT

General info

Name

Type of notification

Distribution Network Entities

Select

E-mail body

Schedule settings

Set date Day(s)

Set time : AM

Invoice options

☒ Add payment method

Attach invoice ☒ Yes ☐ No

E-MAIL VARIABLES

Drag an option to add it into your e-mail body.

Account

Dates

Payment

CANCEL

Figure 8 - New scheduled notifications screen.

2. Enter information on the following fields:

- **E-mail content section:** Section used to set the different parameters to be used for the notification.
- **Name:** This field is used to set the notification name.
- **Type of notification:** This drop-down box menu is used to select the type of notification:
 - **Payment reminder:** This notification type is sent 'n' days before the due date.
 - **Late payment reminder:** For "Per Contract" – "Pre-payment" entities, this notification type is sent 'n' days after the due date. For "Per Contract" – "Post-Payment" or "Pay as you Go" Post-Payment entities, this notification type is sent 'n' days after the due date + credit days.
 - **Suspension reminder:** For "Per Contract" – "Pre-payment" entities, the notification is sent 'n' days before the due date. For "Per Contract" – "Post-payment" or "Pay as you Go" – Post-payment entities, the notification is sent 'n' days before the due date + credit days.
- **Distribution network entities:** This drop-down box is used to send notification to all dependents or only to a defined segment in the distribution network.
- **Select:** This drop-down box is used to select a specific recipient that will receive the notification; this field will be enabled only if the option 'Custom' is selected in the Distribution Network Entities field. By the default, the notifications are sent to the e-mail addresses registered for each entity.
- **E-mail body:** This field is used to set the e-mail body that will be sent; the tags can be used in this field.
- **Schedule settings section:** This section is used to set parameters about the initial date and the duration of the notification.

- **Date:** On this field is set the number of days when the notification will be sent. Depending on the notification type, those days can be before or after the due date + credit limit days.
- **Time:** This field is used to set the time of the day when notification will be sent.
- **Invoice options section:** This section is used to set parameters for the invoice.
- **Add payment method:** This checkbox is used to define if the payment method information will be added to the email body.
- **Attach invoice:** This radio button selection is used to attach or not the invoice to the email notification, invoices are attached only for late payment and suspension notifications.

3. Press the button **Save**.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

Edit Notification:

This option allows an entity to modify the content and parameters of a current notification.

Steps to edit a scheduled notification are:

1. Go to: Squid Menu -> Billing -> Scheduled Notifications.
2. From the search list table, select the notification to be edited and click on the edit button.
3. The notification template page will be displayed.

4. Modify the required parameters.
5. Press **Save button**.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

Change Notification Status:

This option is used to enable or disable a current notification.

Steps to disable a notification status are:

1. Go to: Squid Menu -> Billing -> Scheduled Notifications.
2. From search list table, select the notification to be disabled.
3. Click on the **Status icon**. A confirmation window will be displayed on screen.
4. Click on **Suspend** button to suspend the notification or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

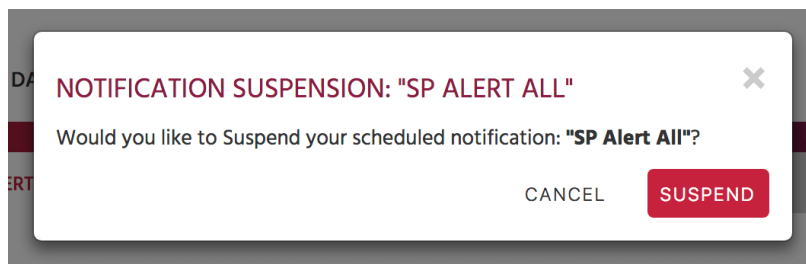


Figure 9 - Confirmation modal to suspend an email notification.

Steps to reactivate a notification are:

1. Go to: Squid Menu -> Billing -> Scheduled Notifications
2. From the search list table, select the notification to be reactivated.
3. Click on the **Status icon**. A confirmation window will be displayed on screen.
4. Click on **Accept** to activate the notification or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

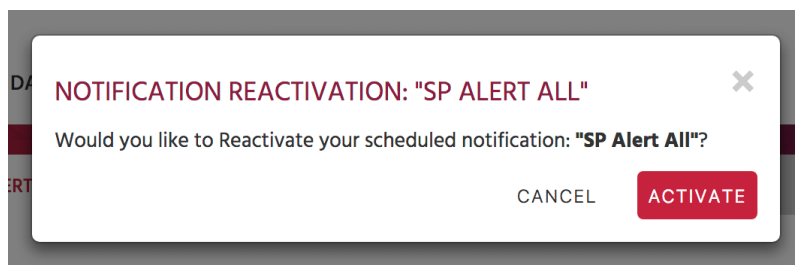


Figure 10 - Confirmation modal to activate an email notification.

Delete Notification:

This option is used to delete any e-mail notification.

Steps to delete a notification are:

1. Go to: Squid Menu -> Billing -> Scheduled Notifications.
2. From the search list table, select the notification to be deleted.
3. Click on **Remove icon** button. A confirmation window will be displayed on screen.
4. Click on **Delete** to delete the notification or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

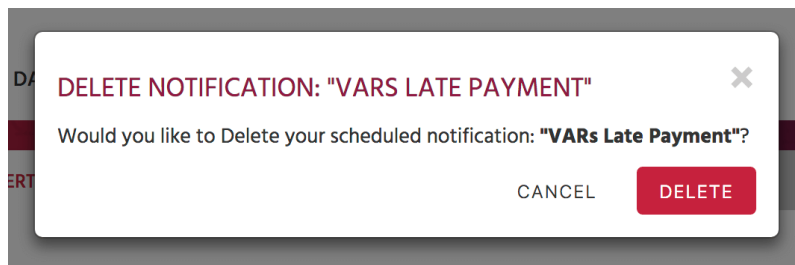


Figure 11 - Confirmation modal to delete an email notification.

Receipt Template

SP

VAR

This section can be used by Service Provider or VAR entities. It is used to customize information that will be displayed in the payment receipt for a dependent entity. Receipt template modification will allow an entity to show a different text in the receipt sent to a dependent entity.

NOTES: The logo used in the template will be taken from the Web Interface Customization section, located on the settings options.

Steps to modify the receipt template are:

1. Go to: Squid Menu -> Billing -> Receipt Template.

A new screen will be displayed with tags that can be used to drag and drop in the left window, the receipt template fields.

Tags on the left side window are **receipt template tags**:

My Info

- **Name:** Tag used to add a parent entity account name into the receipt template.
- **Alias:** Tag used to add a parent entity alias into the receipt template.
- **E-Mail:** Service Provider email.

NOTES: The account name, alias and e-mail are taken from the information registered in the VAR or Service Provider data.

Entity Data

- **Name:** Tag used to add a dependent account name into the receipt template.
- **Alias:** Tag used to add a dependent alias into the receipt template.
- **E-mail:** This tag is used to add a dependent e-mail into the receipt template.
- **Tax Id:** This tag is used to add a dependent tax identification into the receipt template.
- **Customer ID:** Tag used to add the dependent client ID into the receipt template.

NOTES: Dependent data can be a VAR or Enterprise Customer.


Dates

- **Billing date:** Adds a date into the receipt template, when the billing is generated for the dependent.

- **Current date:** Adds a date into the receipt template, when the notification is sent.
- **Due date:** Adds a due date into the receipt template, it corresponds to a dependent.

Payment

- **Payment type:** Adds type of the dependent: "Pre-payment" or "Post-payment".
- **Payment details:** Adds details of the payment into the receipt template.



Invoice

Receipt Template

TEMPLATE FORMAT

Receipt

\$receipt_value

Billing date:

\$date_due

Due date:

\$date_billin

Client Details:

Bank Payment Details:

Quantity	Descriptor	Unit Price	Days Char	Extended F
\$product_quantity	\$product_c	\$product_l	\$product_c	\$product_e

Net total:

\$net_total

Discount:

\$discount_

Total:

\$purshase

Terms & Conditions

Upon payment, please state your invoice number. We kindly request that you take note of the "Due Date" above, in order to pay the invoice in timely fashion and avoid account suspension.

You can log in to your client area to view and pay your invoice. Visit our web page for complete payment instructions. If you do not have an account yet, please contact your account administrator: <ADMIN_NAME>@ADMIN_MAIL>

VARIABLES

Drag an option to add into your template.

My Data

NAME

ALIAS

E-MAIL

Dependent Data

NAME

ALIAS

E-MAIL

TAX ID

CUSTOMER ID

Dates

BILLING DATE

CURRENT DATE

DUE DATE

Payment

PAYMENT TYPE

PAYMENT DETAILS

SAVE

Figure 12 - Receipt template.

2. Complete the Client Details and Bank Payment Details options, so you can use the tags from the left window.
3. Complete the fields: "Terms and Conditions" and "Footer".
4. Press the **Save button**.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.



Upselling

- Upselling
- Requests
- Dependent Pending Requests
- Dependent Historic Requests

Upselling

SP

VAR

EC

This section is an interface that allows viewing, accepting or rejecting any purchase requests or new acquisitions made by dependent entities to its parent.

Upselling has a different behavior depending on the entity. For example, the upselling interface for a Service provider, will display a view of all the upselling requests made by dependent entities in the entire distribution network; while for a VAR, it'll display requests made by Enterprise Customers that are direct dependents of the entity; and for an Enterprise Customers, the interface will display requests made by End Users.

Upselling interface can only be used to request more packages (by an Enterprise Customer to a VAR), or to request a package upgrade (from End Users -mailbox users- to an Enterprise Customer).

Upselling interface for Enterprise Customer (Purchase Scenario):

Because the payment method impacts on the Upselling interface behavior, there are two scenarios. The first one it's an automatic process, when PayPal accounts for the parent entity and the dependent entity has been configured. The second one, is a manual process where one of the entities (or none) has not configured PayPal payment method.

In an automatic process, the upselling interface for Enterprise Customer shows a workflow to see the packages available from the parent entity, select the packages required, request an order and, because PayPal is configured for both parties (parent and dependent entity), basically, the Enterprise Customer uses a self-service interface. The process is described below:

- a. Enter the upselling request interface.
- b. See the packages available.
- c. Request packages.
- d. Check out order.
- e. Confirm order.
- f. Pay order with PayPal.
- g. Finally, get the packages from its parent.

There is no intervention from the parent in the workflow process, and only notifications are sent to both parties about the purchase and package provisioning process.

In a manual process, the upselling interface instead of charging to PayPal, it sends a notification to the parent and put the request in a pending state on the parent interface. So, until the parent confirms the payment made by the dependent entity, it can authorize or deny the request in a manual way, which means once the payment is confirmed by the parent, it can release the new packages to the Enterprise Customer.

Upselling interface for End User (upgrade package request):

On this scenario, the actors are End Users and the Enterprise Customer manager. This scenario is triggered by a widget installed on the Open-Xchange Admin Suite Portal. The workflow is a request from a user to upgrade from one package to another, there is no intervention of the payment method at all.

There is only a manual scenario, where the process always includes an intervention from the Enterprise Customer manager, the process is described below:

- a. End User execute the widget in the App Suite Portal.
- b. End User is redirected to a page to see the packages available for upgrade.
- c. Select the package.

- d. Send a request to its Enterprise Customer manager for approving.
- e. Enterprise Customer manager accesses the Active Orders Upselling section.
- f. Enterprise Customer manager authorizes or rejects the request from the user.
 1. If the request is rejected, a notification will be sent to both parties.
 2. If the request is approved then, Squid will handle the logic to move the user from one package to another, but if there are no packages available to upgrade the Enterprise Customer, a notification will be sent to the Enterprise Customer to request more packages from its parent entity.
 3. Once the request is processed successfully, the user will get the new package assigned.

NOTES: Only for Enterprise Customers in a “Pay as you Go” business model, this causes a change in its billing; for the “Per Contract” scenario, billing is impacted only if the Enterprise Customer request more packages from its parent entity.

Requests

EC

This section is only available for Enterprise Customer entities, and displays available packages offered from its parent entity and allow to request more packages; as explained before, the workflow depends on the payment methods configured for both parties (parent and dependent).

In order to access this section, follow the next path: Squid Menu -> Upselling -> Request.

The screenshot shows a web interface for making an upselling request. At the top, there are three tabs: 'REQUEST' (active), 'DEPENDENTS PENDING REQUEST', and 'DEPENDENTS HISTORIC REQUEST'. Below the tabs is a header area with a shopping bag icon and the text 'Upselling Request'. The main content area is divided into two columns. The left column, titled 'PACKAGES AVAILABLE', contains a list of packages: 'Package Basic' (highlighted in yellow) and 'Package Premium'. The right column, titled 'PACKAGE DETAILS', shows the details for the selected 'Package Basic': Name (Package Basic), Storage (5 GB), Price (\$5.00), and Features (OX PIM, eM Client). An 'ADD PACKAGE' button is located at the bottom right of the details section. Below these columns is a section titled 'PACKAGES REQUESTED' which is currently empty.

Figure 1 - Upselling – Request Page.

Request Page has the following attributes:

Available Package section:

This section shows the packages available, the Enterprise Customer manager can select the preferred offer.

Package Details section:

This section shows details of the selected package.

Add Package:

This button is used to add a package to the request.

Requested Package:

This section shows the packages added to the request.

Make an Upselling Request:

Steps to make an upselling request:

1. Choose and select the packages from the “available packages” section and click on **Add package button**. This will add the package to the “requested packages” section.

PACKAGES REQUESTED	
Package name	Quantity
Package Basic	<input type="text" value="10"/> 

2. Set the number of packages to request.
3. Repeat steps 1 and 2 to add different types of packages to the request.
4. Finally, click on **Request button**.

NOTE: If PayPal method was configured for both parties, the users will follow a PayPal wizard to enter its credentials. If manual payment is configured, then the request will be sent to the parent entity interface (Dependent Pending Request section).

Dependent Pending Requests

SP

VAR

This section shows the active package requests from Enterprise Customers (to VARs) or End Users (To Enterprise Customers).

In order to access this section, follow the next path: Squid Menu -> Upselling -> Dependents Pending Request.

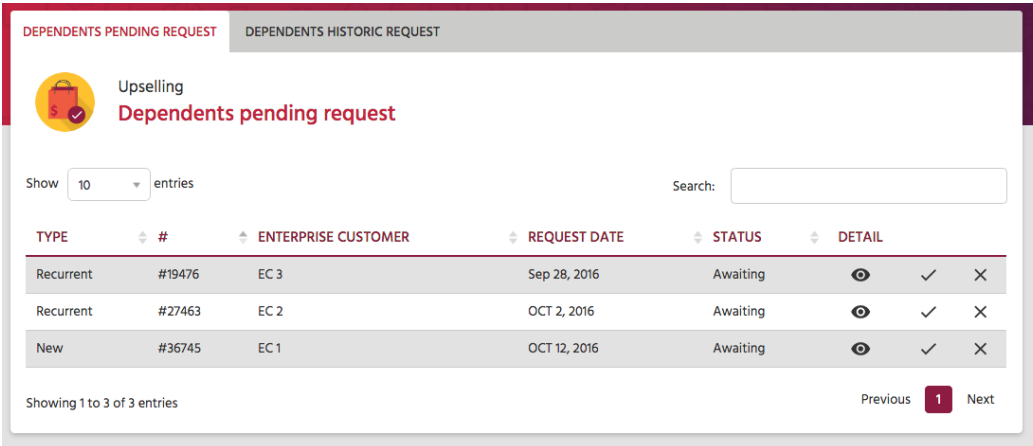


Figure 2 - Upselling – Dependents Pending Request List.

“Dependents Pending Request” list page has the following attributes:

Pending Request table:	This table lists all pending requests from dependents.
Show list:	This drop-down box allows to select the number of entries to be displayed on the table per page.
Search:	This field is used to search an element in “Pending Requests” table, the search functionality will work as the user enters information.
Pagination buttons:	These buttons (Previous and Next) are used to change the table page.
Details request icon:	This icon button is used to show the request details.
Authorization request icon:	This button is used to authorize the request, be aware once the request is authorized, this action can’t be undone.
Reject request icon:	This button is used to reject the request, be aware once the request is rejected, this action can’t be undone.

Pending Request Details:

This functionality allows the entity manager to view the pending request details.
Steps to show the pending request details:

- 1. From pending requests list, search and select the request to view.
- 2. Click on **details icon**. A confirmation window will be displayed on screen.

UPSELLING ORDER DETAIL

Type

Recurrent

#

#19476

Enterprise Customer

EC 1

PACKAGE NAME	QUANTITY	PRICE	FEATURES
Package Basic	15	\$300.00	OX PIM, OX Sync
Package Premium	10	\$524.00	OX PIM, OX Sync, OX Drive, eM Client, OX Guard

Request Date

Sep 28,2017

Total licenses

25

Total price

\$824.00

OK

Figure 3 - Upselling – Dependents Pending Request Details.

“Dependents Pending Request Details” page has the following attributes (all of them are read only):

Type:	Shows the request type.
#:	Shows the request identifier.
Enterprise Customer/ End User:	Shows the name of the requester dependent.

Request table:

This table lists the details of the request, one row per package, the information displayed includes the package name, quantity, price and features included in the package.

Request date:

This field displays the day when the request was done.

Total packages:

This field displays the total number of packages to acquire.

Total price:

This field displays the price of the request order.

Pending Request Authorization:

This functionality allows the entity manager to authorize the pending requests made by dependents on its distribution network.

Steps to accept a request are:

1. From "Pending Request" list, search and select the request to be approved.
2. Click on **accept icon**. A confirmation window will be displayed on screen.
3. Click on **Accept** to accept the request or on **Cancel** to cancel the operation.

Operation results:

Success

A success status window will be displayed.

Error

An error status window will be displayed with details about the error.

NOTES: Request accepted can be canceled later or reversed.

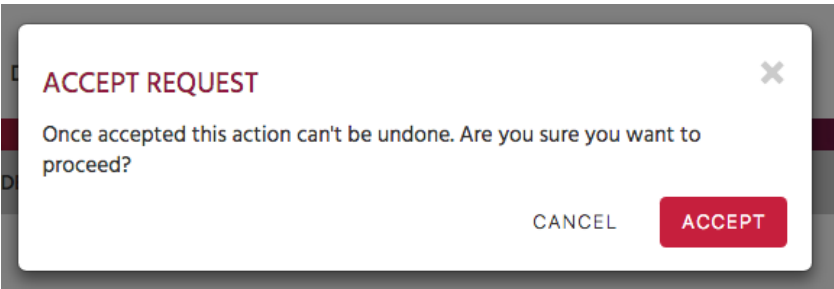


Figure 4 - Upselling – Accept a request modal confirmation.

Reject Pending Request:

This functionality allows the entity manager to reject the pending request made by the account dependents.

Steps to reject a request are:

- 1. From “Pending Request” list, search and select the request to be rejected.
- 2. Click on **reject icon**. A confirmation window will be displayed on screen.
- 3. Click on **Accept** to reject the request or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

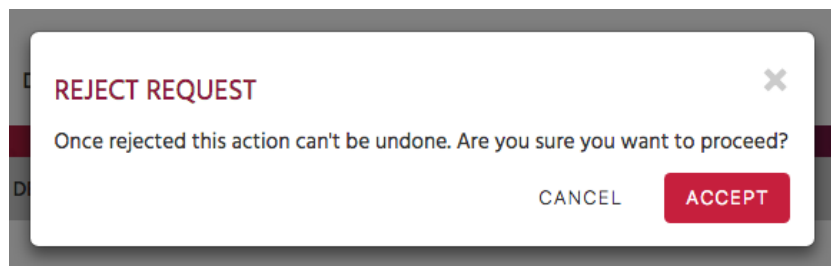


Figure 5 - Upselling – Reject a request modal confirmation.

Dependent Historic Requests

SP

VAR

EC

This section shows a list of all the historic data about accepted and rejected requests. Historic data displayed here depends on the configuration settings set by the Service Provider.

Once the request is authorized or rejected, the information is moved to the Historic request table. In order to access this section, follow the next path: Squid Menu -> Upselling -> Dependents Historic Request.

DEPENDENTS PENDING REQUEST

DEPENDENTS HISTORIC REQUEST

Upselling

Dependents historic request

Show

10

entries

Search:

TYPE	#	ENTERPRISE CUSTOMER	REQUEST DATE	RESPOND DATE	STATUS	DETAIL
Recurrent	#12845	EC 3	May 23, 2017	May 26, 2017	Done	<div><div></div><div></div></div>
Recurrent	#17836	EC1	OCT 12, 2017	OCT 15, 2017	Done	<div><div></div><div></div></div>
Recurrent	#36745	EC 2	SEP 23, 2017	SEP 26, 2017	Done	<div><div></div><div></div></div>

Showing 1 to 3 of 3 entries

Previous

1

Next

Figure 6 - Upselling – Dependents Pending Request List.

“Dependents Pending Request” list page has the following attributes:

Pending Request table: This table lists all historic data of authorized or rejected requests.

Show: This drop-down allows to choose the number of entries to be displayed per page.

Search: This field is used to search an element in the table, the search functionality will work as the user enters information.

Pagination buttons: These buttons (Previous and Next) are used to change the table page.

Details request icon: This icon button shows the request detail.

Accept/Reject icon: These icons indicate if the request was accepted or rejected.



Dashboards

- Dashboards
- Overview
- Value Added Resellers
- Resellers
- Enterprise Customers
- Dynamic
- Report Management

Dashboards

SP

VAR

RESELLER

EC

Squid Dashboards are indicators and charts that provide general information about billing, and counters of the distribution network. Dashboard section has different sub-sections. In the same way as the previous section, permissions are required to have access to this section.

Dashboard section has a different behavior depending on the entity that is logged in Squid:

- For a Service Provider, it will show the Overview, VARs, Dynamic and Report Management sections.
- For a VAR, it will show the Overview, VARs, Resellers, Enterprise Customers, Dynamic and Report Management sections.
- For a Reseller, it will show the Enterprise Customers, Dynamic and Report Management sections.
- For an Enterprise Customer, it will show only the Overview and Report Management sections.

NOTES:

- Dashboard counters are linked to the Billing data; this means it only counts the cash-in Billing invoices for Service Providers, Value Added Resellers and Resellers entities. In case of Enterprise Customers, it will count only cash-out billings.
- It is important to mention that only direct attached entities are counted; and to avoid confusion, it only counts cash-in invoices numbers.

Overview

SP

VAR

RESELLER

EC

This section provides general information about income, users and packages through time. In order to access this section, follow the next path: Squid Menu -> Dashboard -> Overview.

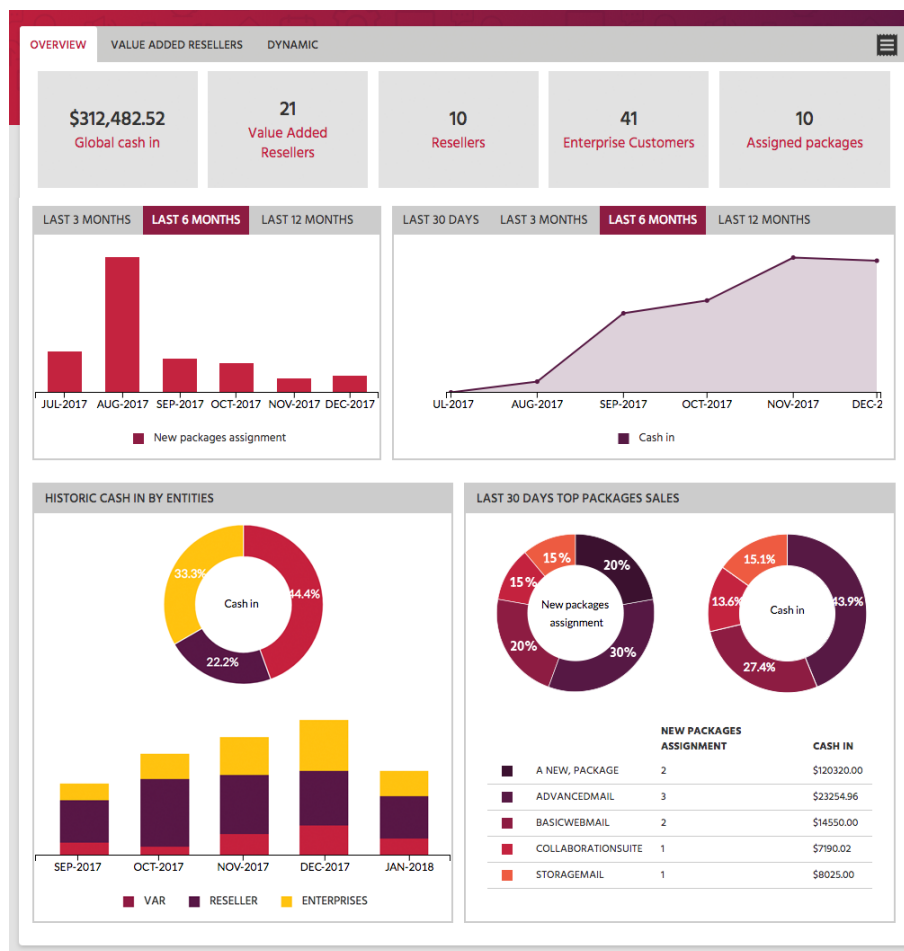


Figure 1 - Squid Dashboard – Overview Page.

Indicators:

Provides the following information for a Service Provider:

Global Revenue indicator:	Shows the global revenue generated by the Billing Module, which takes all the historic billing data since the platform was first used.
Value Added Resellers indicator:	Shows the total VARs in the entity's distribution network, it includes active and suspended VARs.
Reseller indicator:	Shows the total Resellers in the entity's distribution network, it includes active and suspended Resellers.
Enterprise Customer indicator:	Shows the total Enterprise Customers in the entity's distribution network, this counter includes active and suspended Enterprise Customers.
Users indicator:	Shows the total Users in the entity's distribution network, it includes active and suspended Users.

NOTES: Global Revenue, VARs, Resellers, Enterprise Customers and Users counters are updated daily and contains information until one day previous the current date.

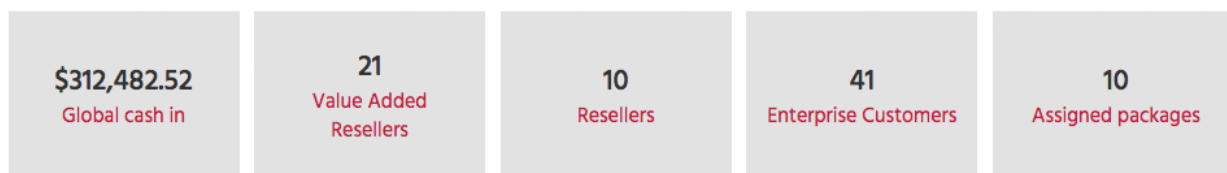


Figure 2 - Squid Dashboard – Overview – Indicators block.

New packages assignments bar chart:

The new packages assignment bar chart is a comparative chart through time.

- **Revenue:** Sum of all Cash-In invoices in the entity's distribution network.
- The information shown is only historical data.



Figure 3 - Squid Dashboard – Overview – New packages assignment bar chart.

This chart includes three header buttons:

Last 3 months button: Shows the last 3 months activity, this is the default chart.

Last 6 months button: Shows the last 6 months activity.

Last 12 months button: Shows the last 12 months activity.

NOTES: This chart doesn't count the current month, the "last" refers to the past month before the current month; for instance, if the current month is April, then the last three months are: March, February and January.

Revenue lineal chart:

The Revenue lineal chart takes information from Billing Cash In section and it shows the revenue generated by the entity's distribution network.

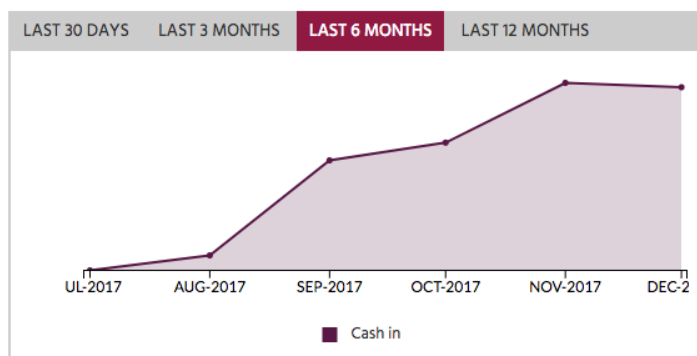


Figure 4 - Squid Dashboard – Overview – Revenue lineal chart.

Includes four header buttons or sections:

- **Last 30 days button:** Shows the last 30 days from the current day - 1 (minus one).
 - This chart is updated daily. For example; if today is April 25, it will compare from April 24 and 30 days of historic data.
 - This is the only chart that will show data from the last period.
- **Last 3 Months button:** Shows the last 3 months from the current month - 1
 - This chart is updated monthly. For example; if the current month is April, this chart will show information about March, February and January.
- **Last 6 Months button:** Shows the last 6 months from the current month - 1

- This chart is updated monthly. For example; if the current month is April, this chart will show information about March, February, January, December, November and October.
- **Last 12 Months button:** Shows the last 12 months from the current month - 1
 - This chart is updated monthly. For example; if the current month is April, this chart will show information from March of the current year until April of the last year.

Historic cash in by entities chart:

Historic cash In by entities chart shows information about the revenue by dependent type.

Revenue information is taken from Billing-Cash section and shows the revenue generated monthly. The chart shows the current month and the last three months of historic data. For the current month, it counts since the current day -1, until day 1 of the month.

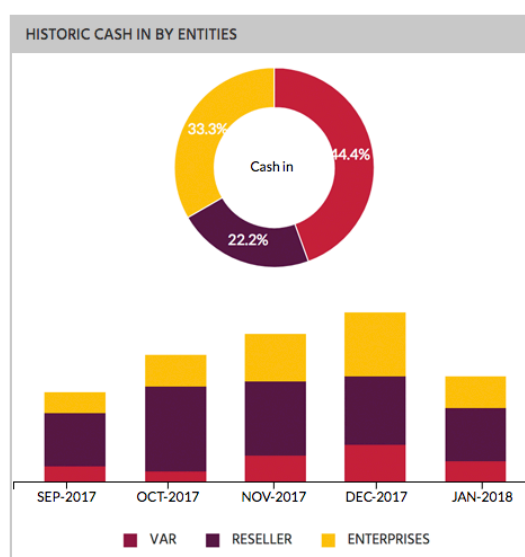


Figure 5 - Squid Dashboard – Overview – Historic cash in by entities chart.

There are two kinds of charts:

- **A bar chart and a donut chart:** Shows information of the revenue (amount based on data from the billing cash-in table of the entity) generated by invoices delivered to VARs, Resellers and Enterprise Customers in the distribution network.
- **Donut chart:** Shows the percentage (%) distribution of the revenue by VARs, Resellers and Enterprise Customers.

NOTES:

- The counter for Enterprise Customers is equal to the invoices generated by the parent entity to the Enterprise Customer entity that is directly attached on the distribution network; this means, there is no Resellers or VARs dependency.
- For Resellers counter, it will count all the invoices generated for the Enterprise Customers that are dependents of a Reseller.
- For VARs counter, it will count the invoices generated to the VAR.

Last 30 days packages sales chart:

“Last 30 Days Packages Sales” chart shows information about the relation between the number of users and number of packages in the last 30 days of the entity’s distribution network. Data is sorted by the higher number of users per package. This chart updates its daily data and counts the last 30 days from the last day; meaning the current day – 1 (minus one day). Only the top 5 packages are displayed, and the rest of the packages are shown in a general counter known as “OTHER”.

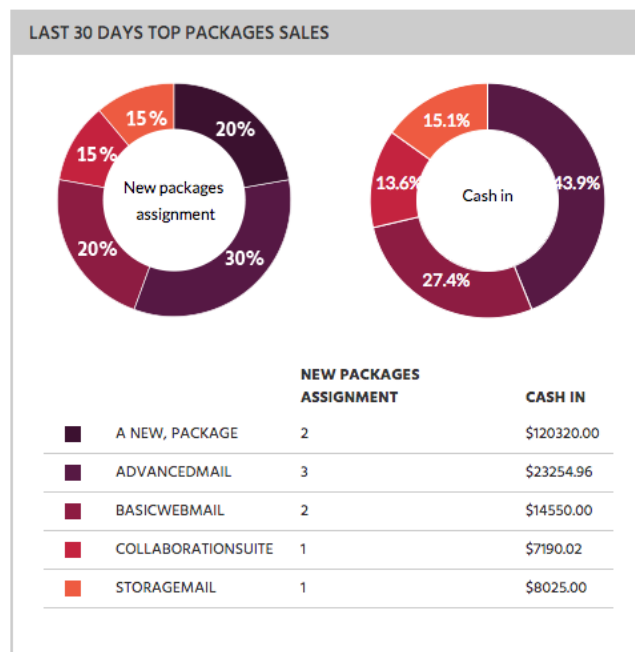


Figure 6 - Squid Dashboard – Overview – Last 30 days packages sales chart.

Value Added Resellers

SP

VAR

This section provides data about VARs belonging to an entity's distribution network. This section includes information about revenue and packages. It also includes a search engine field to gather specific information from a VAR. In order to access this section, follow the next path: Squid Menu -> Dashboard -> VARS.

This section has the following sub-sections: Indicators, Assigned packages, Top Sales by Entity for the last 30 days, Top package Sales of the last 30 days.

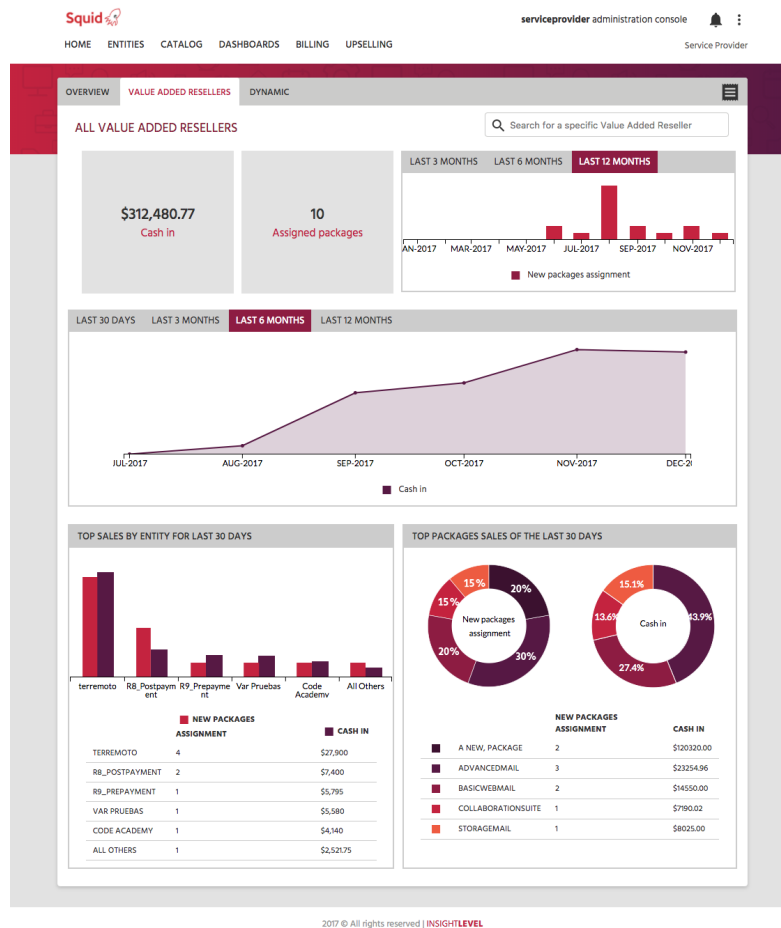


Figure 7 - Squid Dashboard – VARs Page.

Indicators:

Indicators are counters of revenue and users belonging to an entity's distribution network.

Cash In indicator:

This counter shows the Revenue generated by the Billing Module of all VARS in the distribution network, it takes all the historical billing data since the beginning of operations.

Users indicator:

This counter shows the total number of users in the entity's distribution network, it includes active and suspended users.

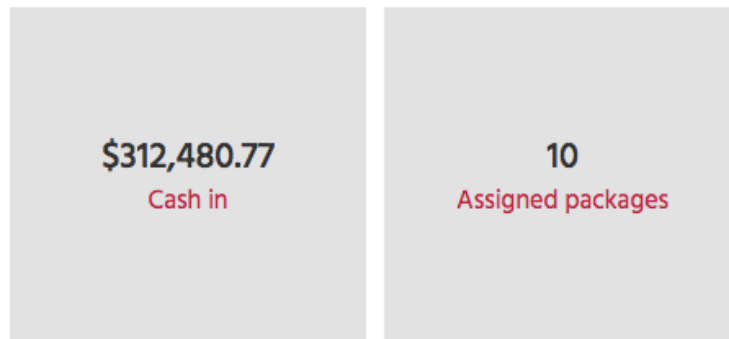


Figure 8 - Squid Dashboard – VARs Page – Indicators block.

Historic new packages assignment chart:

This section shows the Revenue chart through time of the new packages assignment.

- **Revenue:** It is the sum of all cash-in invoices in the distribution network, only for VARs.
- Data shown is only historical.

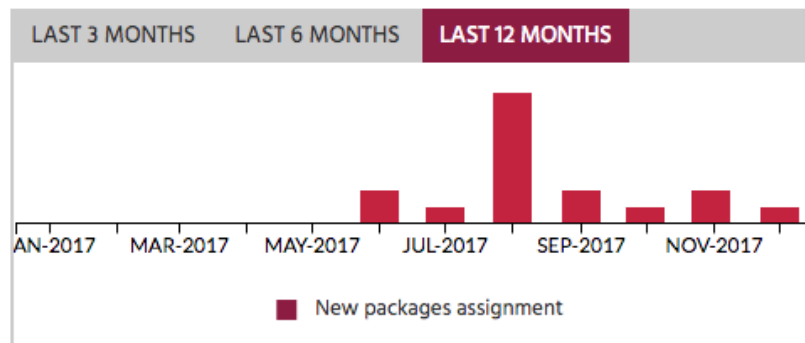


Figure 9 - Squid Dashboard – VARs Page – Historic new packages assignment chart.

This chart includes three header buttons:

Last 3 months button: Shows the last 3 months activity, this is the default chart.

Last 6 months button: Shows the last 6 months activity.

Last 12 months button: Shows the last 12 months activity.

NOTES: This chart doesn't count the current month, so the last one refers to the past month before the current month; for instance, if the current month is April, the last three months are March, February and January.

Revenue lineal chart:

The Revenue lineal chart takes information from Billing Cash-In section, and shows the revenue generated only by VARs in the distribution network.

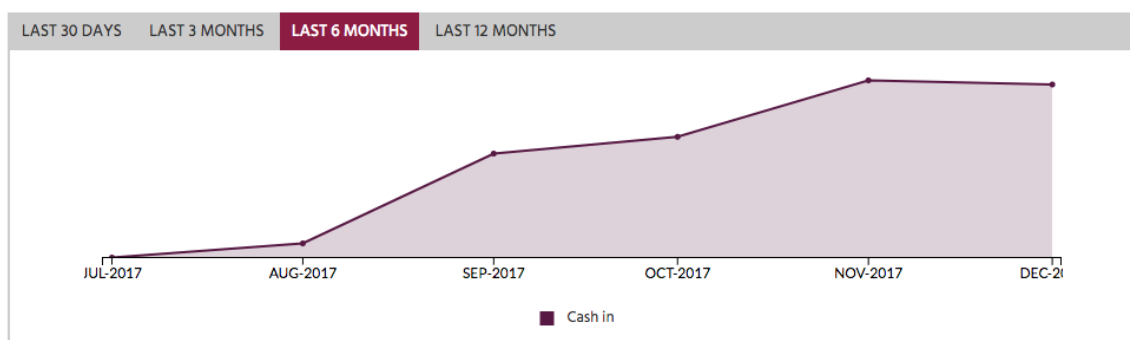


Figure 10 - Squid Dashboard – VARs Page – Revenue lineal chart.

This chart includes four header buttons:

	Shows the last 30 days from the current day – 1.
Last 30 days button:	This chart is updated daily. For example; if today is April 25, it will compare from April 24 and 30 days of historic data. This is the only chart that will show data from the last period.

Last 3 months button: Shows the last 3 months starting from the current month – 1.
This chart is updated monthly.
For example; if the current month is April, this chart will show information about March, February and January.

Last 6 months button: Shows the last 6 months starting from the current month - 1.
This chart is updated monthly.
For example; if the current month is April, this chart will show information about March, February, January, December, November and October.

Last 12 months button: Shows the last 12 months starting from the current month – 1.
This chart is updated monthly.
For example; if the current month is April, this chart will show information from March of the current year until April of the last year.

Top sales by entity for the last 30 days chart:

The top sales by entity for the last 30 days chart shows data about the revenue and new package assignment behavior for the last 30 days, sorting the top VARs entities. Revenue and package assignment are grouped per VAR entity and sorted by the highest revenue. This chart will only show the top 5 VARs, and the rest of the information is displayed in a consolidated counter called 'Other'.

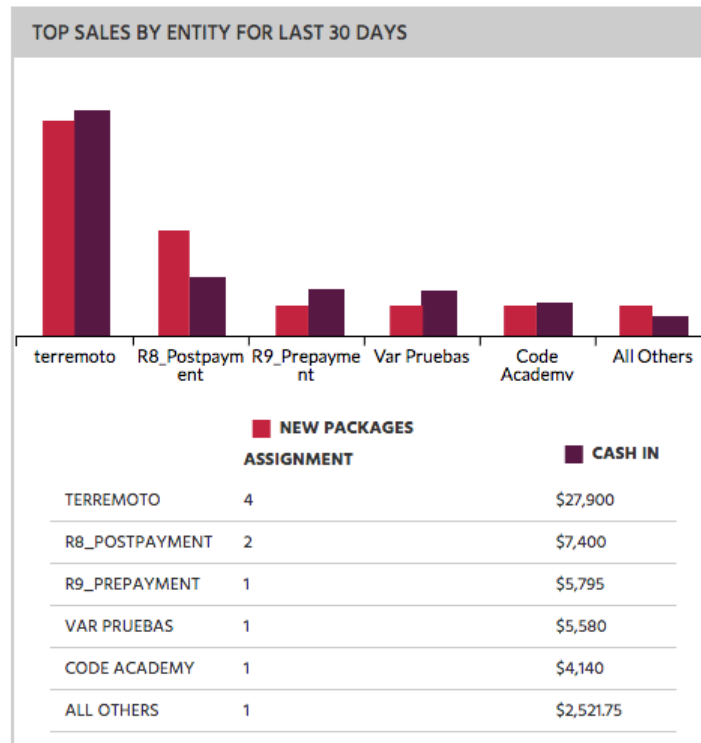


Figure 11 - Squid Dashboard – VARs Page – Top sales by entity for the last 30 days chart.

Top package sales of the last 30 days chart:

The “Top Package Sales of the last 30 Days” chart shows information about the relation between the CashIn and number of packages assignment in the last 30 days, but only of the users that belong to a VAR in the entity’s distribution network.

Data is sorted by the higher number of Cash In. This chart updates its daily data and counts the last 30 days from the last day. This means, the current day – 1 day. Only the top 5 packages are displayed, and the rest of the packages are shown in a general counter known as “OTHER”.

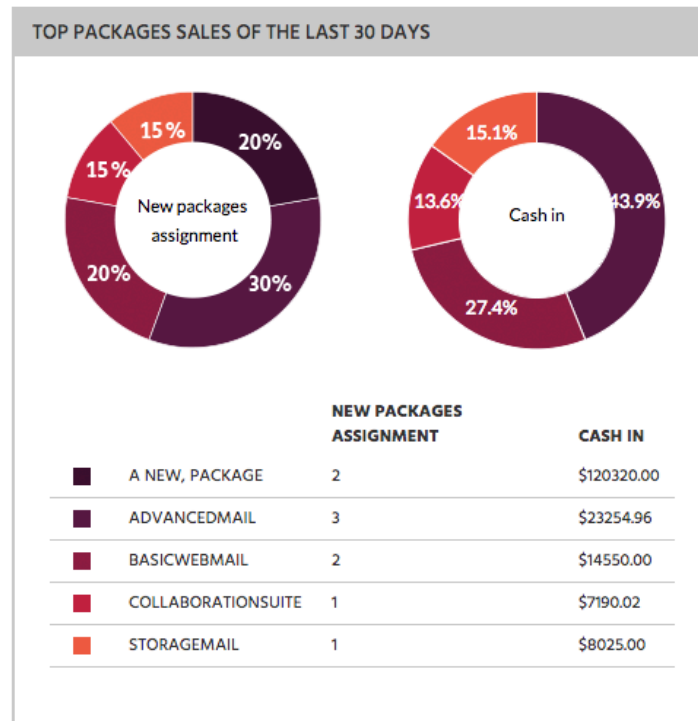


Figure 12 - Squid Dashboard – VARs Page – Top package sales of the last 30 days chart.

VAR Search Engine:

VAR search engine allows to filter data and look for a specific VAR that belongs to the distribution network. In order to find a specific VAR, it is necessary to enter the account name; then, a suggestion drop-down menu will be displayed and the specific VAR can be selected.

Q Do

Controlado_Var

var_dos

Figure 13 - Squid Dashboard – VARs Page – VAR Search Engine.

Once the filter is applied, a new page with specific information about the selected VAR will be displayed. In this scenario, a Top Enterprise Customers chart will be displayed instead.

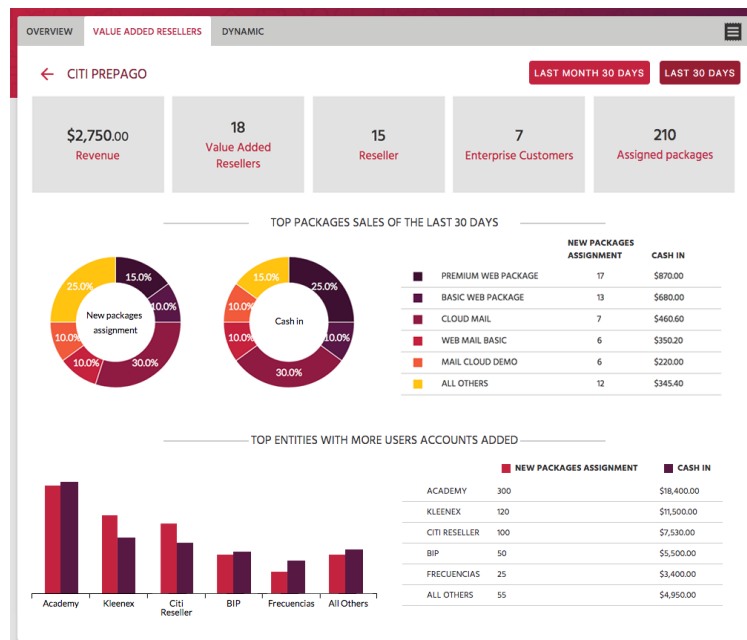


Figure 14 - Squid Dashboard – VARs Page – VAR Search Engine – VAR Result Page.

Resellers

SP

VAR

This section provides information about Resellers belonging to the distribution network of the entity. It includes information about Revenue, packages and a search engine field to gather specific information from a Reseller.

This section is only available for VAR entities in the distribution network, and if they have the right permissions to extend its distribution network, or at least has resellers under its distribution network.

In order to access this section, follow the next path: Squid Menu -> Dashboard -> Resellers.

This section has the following sub-sections: Indicators, Assigned packages, Revenue & new packages assignment comparative chart, Historic Cash In.

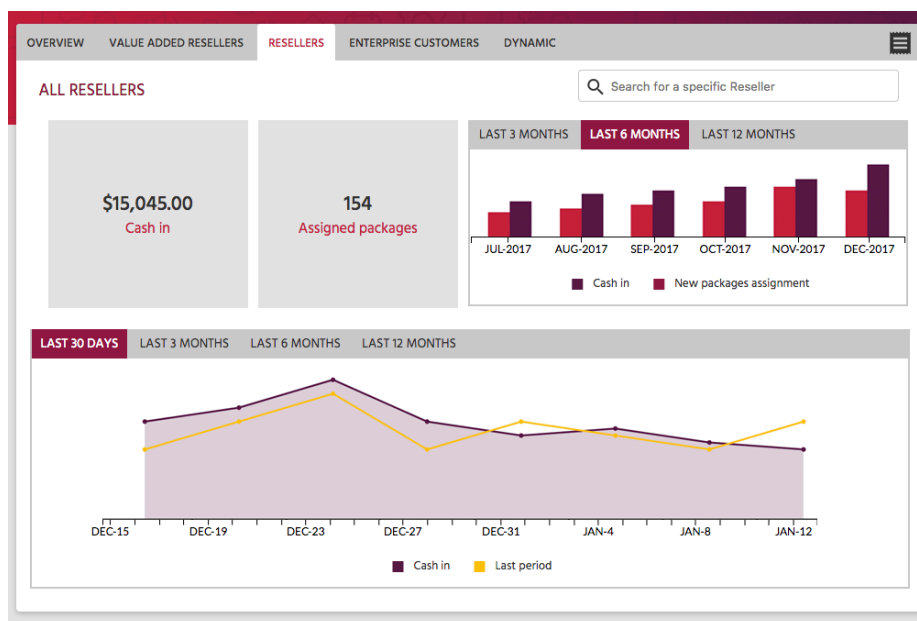


Figure 15 - Squid Dashboard – Resellers Page.

Indicators:

Indicators are counters for Revenue and Package assignment belonging to the entity's distribution network.

- **Cash in indicator:** This counter shows the Revenue generated by the Billing module of all the Enterprise Customer dependents of the Resellers in the entity's distribution network. This takes all the historical billing data since the entity started operations.
- **Assigned packages indicator:** This counter shows the total number of packages assignment in the entity's distribution network.

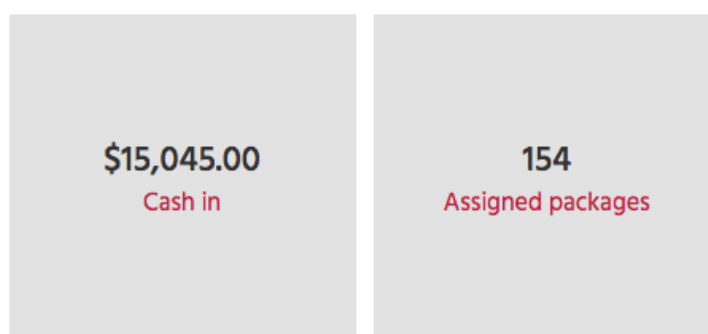


Figure 16 - Squid Dashboard – Resellers Page – Indicators block.

Historic cash in and package assignment bar chart:

This section shows the Revenue and Users comparative bar chart through time.

- **Revenue:** means the sum of all Cash-in invoices in the entity's distribution network, only for Enterprise Customers dependent on a Reseller directly attached to the entity.
- **Users:** means the sum of all users in the entity's distribution network.

Information shown is historical information only.

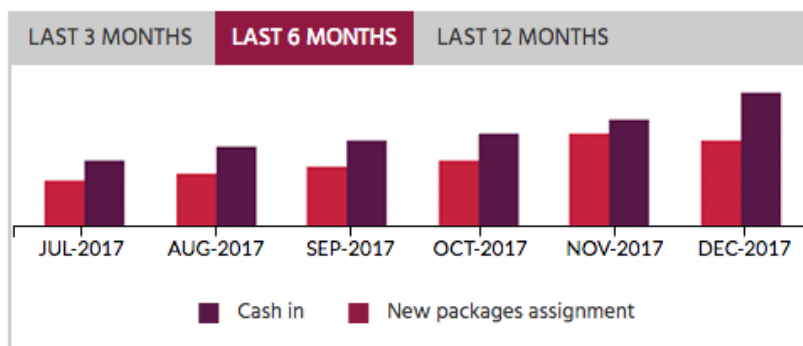


Figure 17 - Squid Dashboard – VARs Page – Historic cash in and package assignment bar chart.

This chart includes three header buttons: Last 3 months, Last 6 Months and Last 12 months.

Last 3 months button: Shows the last 3 months activity, this is the default chart.

Last 6 months button: Shows the last 6 months activity.

Last 12 months button: Shows the last 12 months activity.

NOTES: This chart doesn't count the current month, so the "last one" refers to the past month before the current month; for instance, if the current month is April, then the last three months are March, February and January.

Revenue lineal chart:

The Revenue lineal chart shows information related to the current revenue in the last period revenue.

Revenue information is taken from Billing Cash-in section and shows the revenue generated only by Enterprise Customer dependents on the Resellers directly attached to the entity in the distribution network.

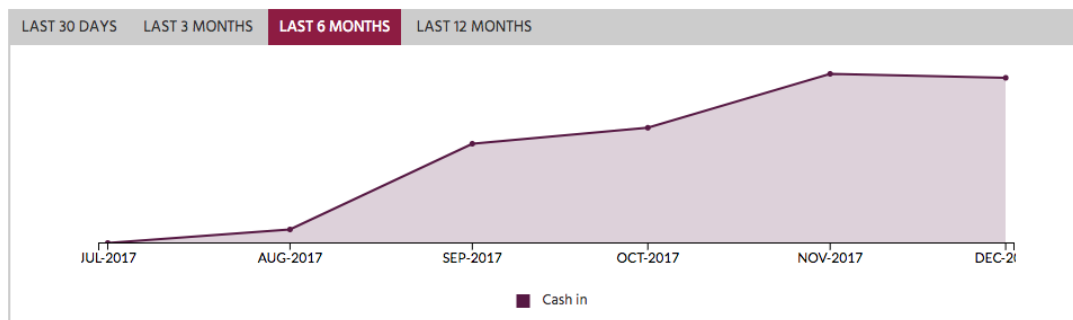


Figure 18 - Squid Dashboard – Resellers Page – Revenue lineal chart.

The chart includes four header buttons: last 30 days, last 3 months, last 6 months and last 12 months.

- **Last 30 days button:** Shows the last 30 days from the current day – 1.
 - This chart is updated daily. For example, if today is April 25, it will compare from April 24 and 30 days of historical data.
 - This is the only chart that displays data from the last period.
- **Last 3 months button:** Shows the last 3 months starting from the current month – 1.
 - This chart is updated monthly. For example, if the current month is April, this chart will show information about March, February and January.
- **Last 6 months button:** Shows the last 6 months starting from the current month – 1.
 - This chart is updated monthly. For example, if the current month is April, this chart will show information about March, February, January, December, November and October.

- **Last 12 months button:** Shows the last 12 months starting from the current month – 1.
 - This chart is updated monthly. For example, if the current month is April, this chart will show information from March of the current year until April of the last year.

Reseller Search Engine:

Reseller search engine allows to filter information and look for a specific Reseller belonging to the entity's distribution network.

In order to find a specific Reseller, it is necessary to enter the account name; then, a suggestion drop-down menu will be displayed and the specific Reseller can be selected.

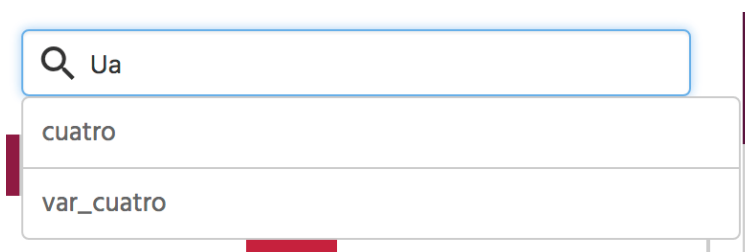


Figure 19 - Squid Dashboard – Resellers Page – Resellers Search Engine.

Once the filter is applied a new page with specific information about the selected Reseller will be displayed. In this scenario, a Top Resellers chart will be displayed instead.

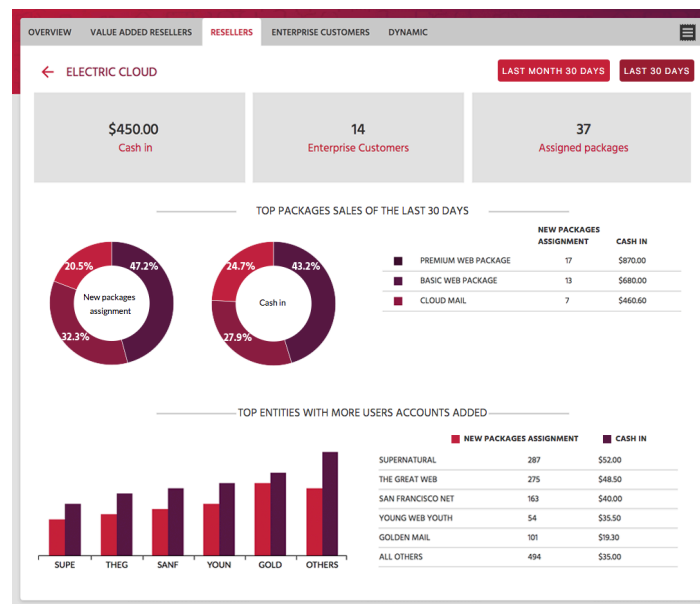


Figure 20 - Squid Dashboard – Resellers Page – Resellers Search Engine – Reseller Result Page.

Enterprise Customers

SP

VAR

RESELLER

This section provides information about Enterprise Customers belonging to the distribution network of the entity. This information doesn't count Enterprise Customers of other dependents; for example, Enterprise Customers belonging to another VAR or another Reseller, even if they belong to the entity's distribution network.

This section includes information about Revenue and packages. It also includes a search engine field to gather specific information about an Enterprise Customer

It is available only for VAR and Reseller entities in the distribution network, and only if they have the permission to extend their distribution network, or at least, if they have Enterprise Customers under their distribution network.

In order to access this section, follow the next path: Squid Menu -> Dashboard -> Enterprise Customers.

This section has the following sub-sections: Indicators, New packages assignment chart, Cash In Historic Data, Top Sales by Entity of the last 30 days and Top packages sales of the last 30 days.

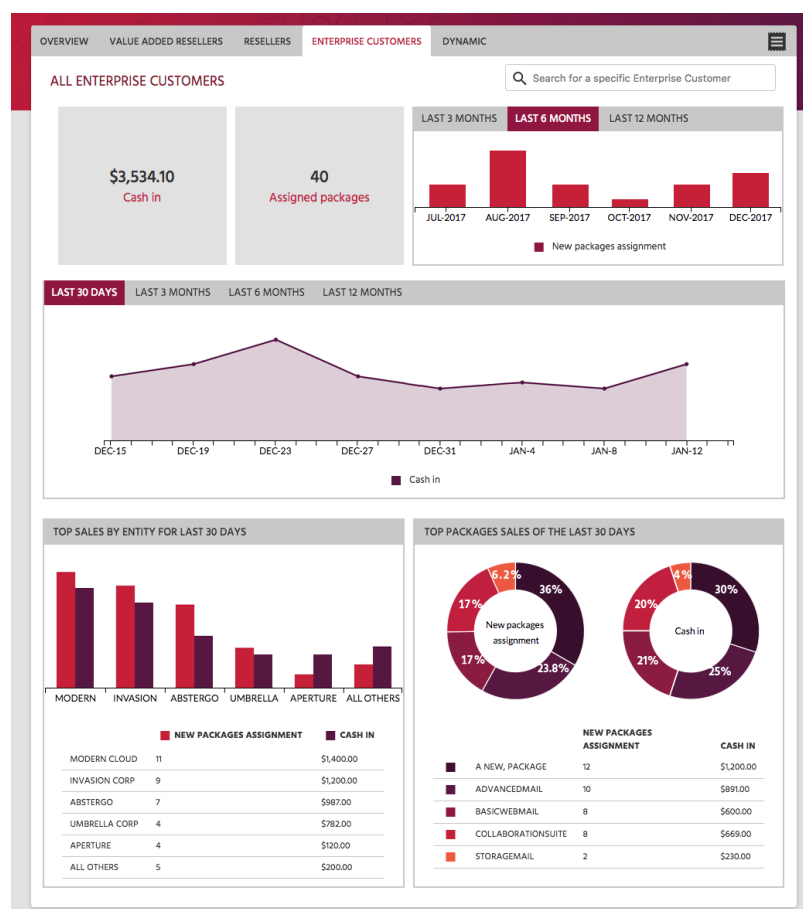


Figure 21 - Squid Dashboard – Enterprise Customer Page.

Indicators:

Indicators are counters for Cash In and Package assignment belonging to the entity's distribution network.

- **Cash in indicator:** This counter shows the Revenue generated by the Billing Module of the Enterprise Customers, which are attached as dependents of the entity. This takes all the historical billing data since the entity started operations.
- **Package assignment indicator:** This counter shows the number of packages assigned that belongs to the Enterprise Customers in the entity's distribution network. This counter includes active and suspended users.

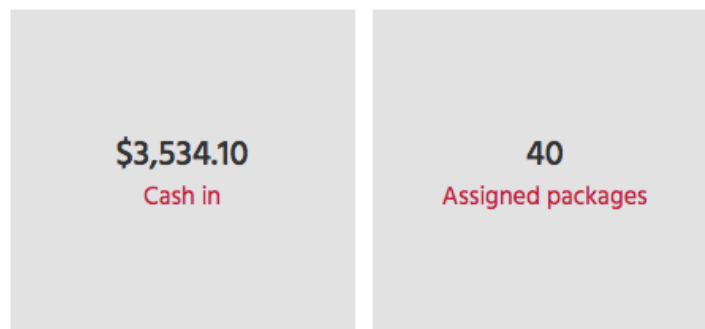


Figure 22 - Squid Dashboard – Enterprise Customers Page – Indicators block.

New package assignments chart:

This section shows the New package assignment chart through time. It shows only historical data.

- **Package assignment:** means the sum of all new package assignment in the entity's distribution network, only for Enterprise Customers directly attached as a dependent.

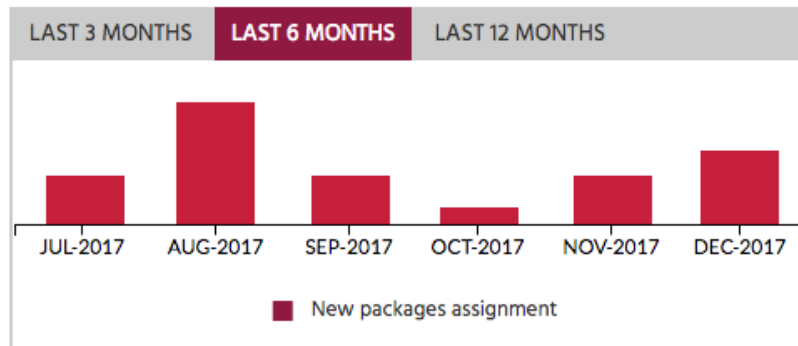


Figure 23 - Squid Dashboard – Enterprise Customer Page – New package assignments chart.

This chart includes three header buttons: Last 3 months, Last 6 Months and Last 12 months.

Last 3 months button: Shows the last 3 months activity, this is the default chart.

Last 6 months button: Shows the last 6 months activity.

Last 12 months button: Shows the last 12 months activity.

NOTES: This chart doesn't count the current month, so the "last one" refers to the past month before the current month; for instance, if the current month is April, then the last three months are March, February and January.

Revenue chart:

The Revenue lineal chart shows information related to the current revenue in the last period.

Revenue information is taken from Billing Cash-in section and shows the revenue generated by the Enterprise Customers dependents on an entity in the distribution network.

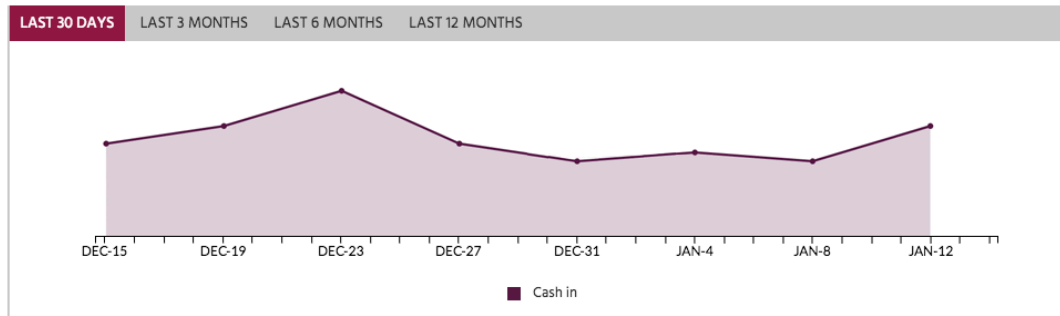


Figure 24 - Squid Dashboard – Resellers Page – Revenue Chart.

Includes four header buttons:

- **Last 30 days button:** Shows the last 30 days from the current day – 1.
 - This chart is updated daily. For example, if today is April 25, it will compare from April 24 and 30 days of historical data.
 - This is the only chart that displays data from the last period
- **Last 3 months button:** Shows the last 3 months starting from the current month – 1.
 - This chart is updated monthly. For example, if the current month is April, this chart will show information about March, February and January.
- **Last 6 months button:** Shows the last 6 months starting from the current month – 1.
 - This chart is updated monthly. For example, if the current month is April, this chart will show information about March, February, January, December, November and October.
- **Last 12 months button:** Shows the last 12 months starting from the current month – 1.

- This chart is updated monthly. For example, if the current month is April, this chart will show information from March of the current year until April of the last year.

Top sales by entity of the last 30 days chart:

The “Top Sales by Entity of the last 30 days” chart shows information about the revenue versus the packages assignment of the last 30 days sorting the top Enterprise Customer entities.

Revenue and package assignment are grouped per Enterprise Customer entity and sorted by the higher revenue.

This chart will only show the top 5 entities, and the remaining information will be displayed in a consolidated counter called “OTHER”.

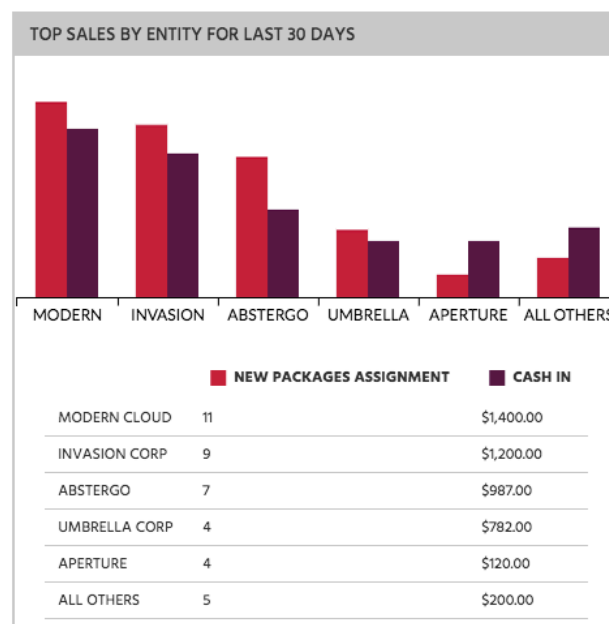


Figure 25 - Squid Dashboard – Enterprise Customers Page – Top sales by entity of the last 30 days chart.

Top package sales of the last 30 days chart:

“Top Package Sales of the last 30 days” chart shows information about the relation between the CashIn versus the new package assignment of the last 30 days; but only of users belonging to an Enterprise Customer that depend on the entity in the distribution network.

Data is sorted by the higher number of users per package.

This chart updates data daily and counts the last 30 days from the last day, this means current day – 1 day. Only the top 5 Packages are shown, and the remaining information will be displayed in a general counter called “OTHER”.

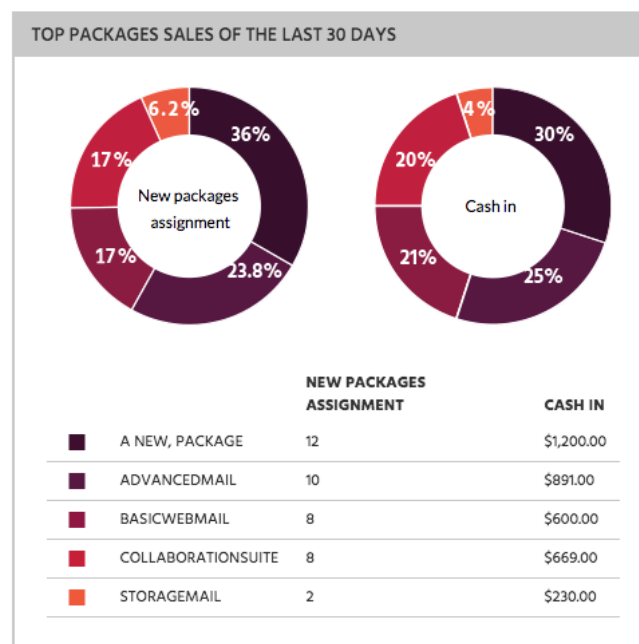


Figure 26 - Squid Dashboard – Enterprise Customers Page – Top package sales of the last 30 days chart.

Enterprise Customer Search Engine:

Enterprise Customer search engine allows to filter information and look for a specific Enterprise Customer belonging to the entity's distribution network. In order to find a specific EC, type the account name; then, a suggestion drop-down menu will be displayed and the specific EC can be selected.

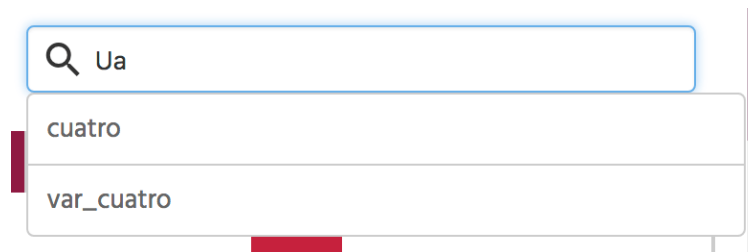


Figure 27 - Squid Dashboard – Enterprise Customer Page – Enterprise Customer Search Engine.

Once the filter is applied, a new page with specific information about the selected Enterprise Customer will be displayed. In this scenario, a Top Enterprise Customers chart will be displayed instead.

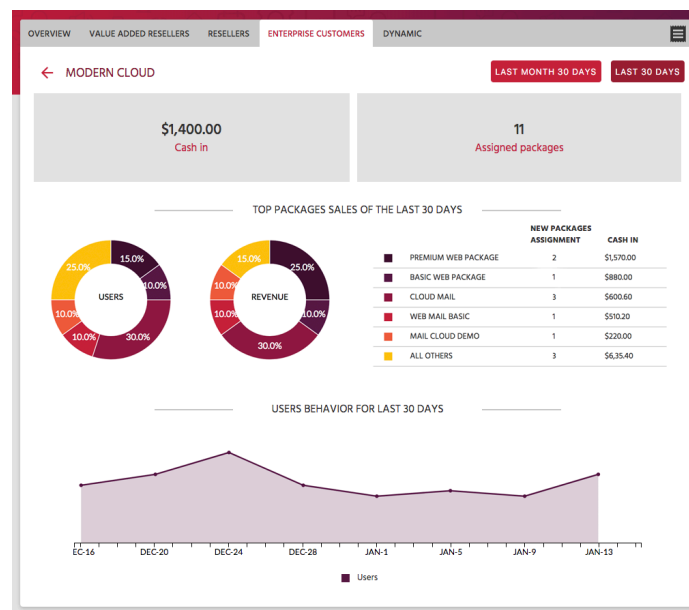


Figure 28 - Squid Dashboard – Enterprise Customers Page – Enterprise Customers Search Engine – Enterprise Customer result page.

Dynamic



The Dynamic section provides a feature to build specific and cross information custom reports. These dynamic reports can use specific parameters to cross and compare information about assigned packages and Cash In, using filter parameters like: Packages, VARs, Resellers, Enterprise Customers and Dates.

Parameters used in Dynamic section are described below:

Metric list:	This drop-down menu lists Users and Revenue as metric options.
Account list:	This drop-down menu is used as a filter; it shows a list with dependents, these can be VARs, Resellers, Enterprise Customers.
Package list:	This drop-down menu is used as a filter; it shows a list with available packages.
Date:	This is a Date-picker option to choose a reference month.
Select metrics:	This checkbox is used to enable the comparison metrics.

In order to access this section, follow the next path: Squid Menu -> Dashboard -> Dynamic.

OVERVIEW VALUE ADDED RESELLERS **DYNAMIC**

Select metrics ☐ Select metrics

Metric

Account

Package

Date

Metric

Account

Package

Date

SEARCH

Figure 29 - Squid Dashboard – Dynamic page – Parameters block.

Steps to execute a dynamic report are:

1. Choose a primary metric: Assignments or Cash In.
2. Choose an entity as a filter, or leave the default value if no filter will be applied; this means all the entities belonging to the distribution network will be considered.
3. Choose a package as a filter, or leave the default value (All Packages); this means all packages will be considered.
4. Choose a date. The month to view can be selected here.
5. If you need to have a cross information report; check to enable the box “Select metrics” and fill the same fields (Metric, Account, Package and Date).
6. Click on **Search button**.

Operation results:

Success	A linear graphic will be displayed. If the “select metrics” checkbox was enabled and the fields were full, a comparison graphic will be displayed.
Error	An error status window will be displayed with details about the error.

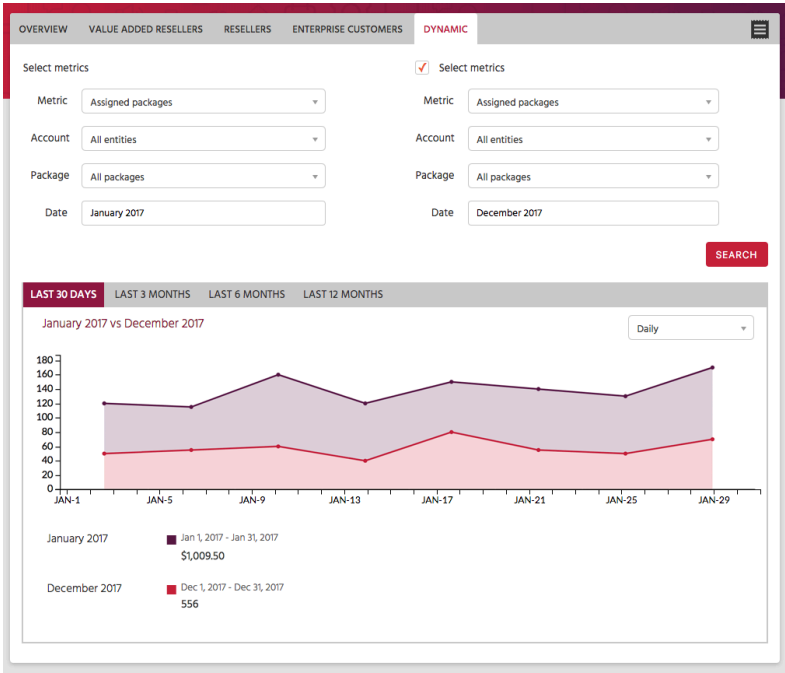


Figure 30 - Squid Dashboard – Dynamic Page – Result block.

The graphic chart has the following attributes:

Result chart:	Chart with results of the dynamic report.
Result legend:	Legend with results and selected data periods on the dynamic report.
Chart title:	Title of the query.
View mode list:	List with different view modes: daily, weekly, monthly or quarterly.

- **Last 30 days header button:** Shows the last 30 days starting from the current date – 1 day.
 - This is the default graphic shown.

- **Last 3 months button:** Shows information of the last 3 months starting from the last month.
- **Last 6 months button:** Shows information of the last 6 months starting from the last month.
- **Last 12 months button:** Shows information of the last 12 months starting from the last month.

“Last month” means current month – 1. So, if the current month is April, the last month refers to March.

Report Management

SP

VAR

RESELLER

EC

This section allows the entity manager to schedule reports in a specific date; to retrieve specific historical data and send it to recipients or mailboxes by e-mail. Scheduled reports are specific for each entity in the distribution network. So, an entity can manage its own reports, if the permission was given by its parent entity.

In order to access this section, follow the next path: Squid Menu -> Dashboard -> Report Management icon.

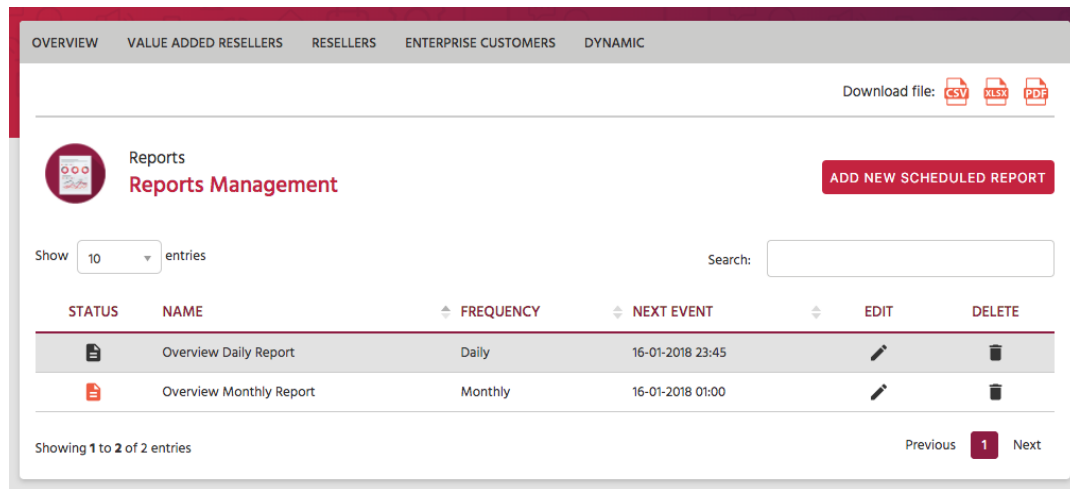


Figure 31 - Squid Dashboard – Report Management Page.

Report Management section has the following attributes:

Reports table:	This table shows a list with all the scheduled reports created by the entity.
Add New Scheduled Report:	This button is used to create a scheduled report.
Download file:	These buttons are used to export the reports table to a specific format like CSV, XLSX and PDF.
Show list:	This drop-down menu allows to select the number of records to display per page.
Search:	This input field allows to search an element in the reports table, the search functionality will work as the user enters information.
Pagination buttons:	These buttons (Previous and Next) are used to change the table page.

Duration:	This column shows reports duration: time the report will be running.
Sending:	This column shows reports periodicity: the periods of time that the report will be executed.
Next Sending:	This column shows the next execution period of the report.
Edit:	This icon button is used to edit an existing report.
Delete:	This icon button is used to delete an existing report.
Suspend/Activate:	This icon button is used to suspend or re-activate an existing report.

Create a new Report:

This option is used to create a new scheduled report.

Steps to create a new report are:

1. Click on **Add New Scheduled Report** button. This will open a new page.
2. Enter information in the following fields:

- **General**

- *** Name:** This field is used to set a name for the report.
- *** Duration:** The numeric field and drop-down menu are used to set the execution time of the report.
- *** Period:** This field is used to set a periodicity for sending the report; available options are daily, weekly, monthly, 2 months, 3 months, 6 months and 12 months.

- **Set time:** These drop-down boxes are used to schedule the time when the report will be executed.
 - **Select Report Info**
 - **Page:** This drop-down box allows selecting the report sections.
 - **View:** This drop-down box allows selecting a time-scale period used on the report, the options are: last 30 days, last 3 months, last 6 months and last 12 months.
 - **Add Option:** This button is used to add another page to the report and set the parameters for “Page” and “View” options.
 - **E-mail Recipients**
 - **E-mail:** This field is used to add the e-mail recipients that will receive the report.
 - **Add button:** Used to add the e-mail recipient to the list.
3. Review all the information and click on **Save** to create the new report or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
Error	An error status window will be displayed with details about the error.

← ADD NEW SCHEDULED REPORT

GENERAL

Information

Name Duration

Scheduled options

Period Day

Set time :

SELECT REPORT INFO ADD OPTION

Option

Data range

EMAIL RECIPIENTS

Email recipients ADD

CANCEL SAVE

Figure 32 - Squid Dashboard – Create New Scheduled Report Page.

Edit an existing Report:

This option is used to edit an existing scheduled report.

Steps to edit a report are:

1. From Reports list, search and select the report to be edited.
2. Click on edit icon button. This will open the report edit page.
3. Change the required information.
4. Review all the information and click on **Save** to save changes or on **Cancel** to cancel the operation.

Operation results:

Success A success status window will be displayed.

Error An error status window will be displayed with details about the error.

← EDIT SCHEDULED REPORT

GENERAL

Information

Name Duration

Scheduled Report

Period Day

Set time :

SELECT REPORT INFO ADD OPTION

Option

Data range

EMAIL RECIPIENTS

Email Recipient ADD

×

CANCEL SAVE

Figure 33 - Squid Dashboard – Edit an existing Report Page.

Delete an existing Report:

This option is used to delete an existing scheduled report.

Steps to delete a report are:

1. From Reports list, search and select the report to be deleted.
2. Click on delete icon button. A confirmation window will be displayed on screen.
3. Click on **Delete** to delete that report or on **Cancel** to cancel the operation.

Operation results:

Success A success status window will be displayed.

Error An error status window will be displayed with details about the error.

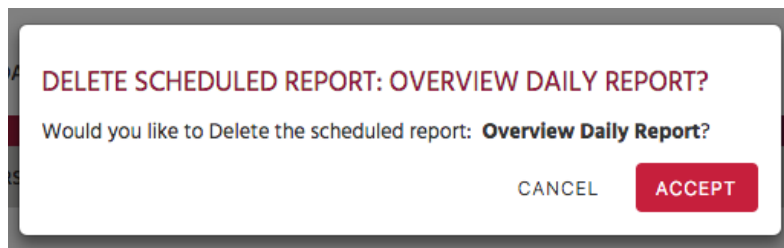


Figure 34- Squid Dashboard – Report Management List – Delete an existing Report.

Suspend/Reactivate an existing Report:

This option is used to suspend or reactivate an existing scheduled report.

Steps to suspend a report are:

1. From Reports list, search and select the batch/scheduled report to suspend.
2. Click on status icon button. A confirmation window will be displayed on screen.
3. Click on **Suspend** to suspend that report or on **Cancel** to cancel the operation.

Operation results:

Success	A success status window will be displayed.
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Error	An error status window will be displayed with details about the error.
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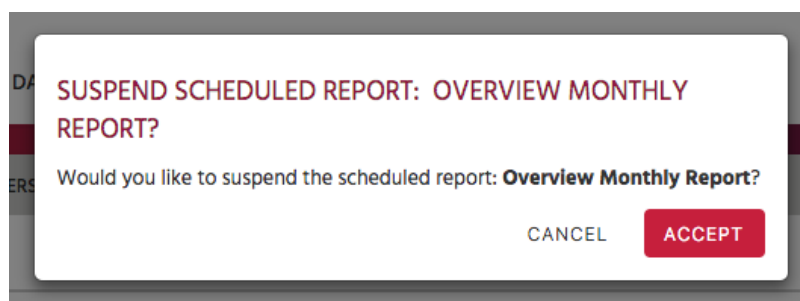


Figure 35 - Squid Dashboard – Report Management List – Suspend an existing Report.



Figure 36 - Squid Dashboard – Report Management.

Steps to reactivate a report are:

1. From Reports list, search and select the scheduled report to be reactivated.
2. Click on status icon. A confirmation window will be displayed on screen.
3. Click on **Activate** to reactivate the report or on **Cancel** to cancel the operation.

Operation results:

Success A success status window will be displayed.

Error An error status window will be displayed with details about the error.

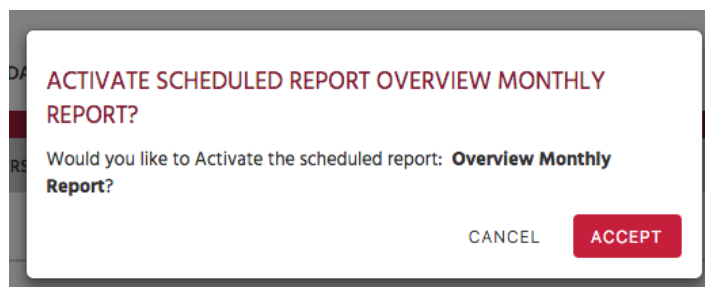


Figure 37 - Squid Dashboard – Report Management List – Activate an existing Report.



Figure 38 - Squid Dashboard – Report Management List.