



Portal User Guide

Resellers

Version 1.1

Table of Contents

Introduction	3
Using the Sharedband Portal	4
Login.....	4
Reset Password	4
View Accounts.....	4
Search accounts	4
Manage accounts.....	4
Shortcuts	4
Add Company.....	5
Edit Company	5
Delete Company.....	5
Portal Users.....	5
Account Management	5
Add account	5
Manage accounts.....	6
Delete Account.....	6
Portal User Management.....	6
Search Users.....	6
Add Portal User	6
Edit Portal User	6
Delete Portal User.....	7
Edit my user account.....	7

Introduction

The Sharedband Portal User Guide (Resellers) describes the day-to-day running of the Sharedband Portal from a reseller point of view. The following related documents are also available:

- Sharedband Portal User Guide (Customers)
- Sharedband Portal User Guide (Administrators)

This guide will show you how to log in to the system, reset your password, create, manage and delete companies, accounts and users, and update your own account details.

Using the Sharedband Portal

Login

Log in to the Sharedband portal, using the URL, email address and password supplied by your system administrator.

Once you have logged in successfully, you will see the default **View Accounts** screen.

Reset Password

If you forget your password, you can reset it by clicking 'Reset Password' from the login screen. Enter your email address and click 'Request Password Reset'. Follow the link in the email we send to reset your password.

The reset password link expires after two hours; if you have not reset your password within this time, just send us a new reset request.

Once you have entered and confirmed your new password, the Portal redirects you to the login screen to log in with your new details.

If you are still unable to log in, please contact your system administrator.

Password Tips

1. Choose a new password which is unique to the Sharedband Portal.
2. Make sure it's easy to remember but not to guess.
3. Use a mixture of upper- and lower-case letters, and numbers and symbols.
4. Keep all your passwords in a safe place.

View Accounts

The **View Accounts** screen provides you with a summary of all the accounts associated with your reseller account, and offers some system shortcuts.

Search accounts

Search for particular accounts using the 'Filter' facility; enter an account name, or part name, and click 'Filter'. Click 'Reset' to return to the default screen.

Manage accounts



Click 'Edit Account' to change the account name, number of IP addresses or number of lines, then click 'Save Account'.



Click 'Login As' to open a new window where you can view service and device status, and edit configuration options. To return to the Sharedband Portal, click 'Log Out' then close the window.



To delete an account, click 'Delete Account' and 'Delete' when you see the confirmation prompt.

Shortcuts

To add a new company, account or user quickly, click 'Actions', select from the pull-down menu, then follow the appropriate instructions for adding companies, accounts and users in the **Company, Account and Portal User Management** sections below.

Company Management

Company Management allows you to create, edit and remove companies which are associated with one or more accounts. You can then give Portal users access to these companies and their associated accounts.

To see the **Company Management** default screen, click 'Company Management' at the top left of your screen.

Add Company

To add a new company, click 'Add Company'.

Enter the name of the company, set the reseller switch — ON for resellers and OFF for others — and click 'Save Company'. The Portal will redirect you to the **Edit Company** screen.

Edit Company



To edit a company, click 'Company Management' at the top left of your screen, followed by 'Edit Company'. You will access this screen automatically when you add a new company.



To change the company's name, click 'Information', enter a new name and then click 'Save Company'.



Click 'Accounts' followed by 'Add Account', to add a new account. Follow the prompts, and click 'Add Account' to submit. See **Account Management** below for further details.

Delete Company



To delete a company, click 'Delete Company' and 'Delete' when you see the confirmation prompt.

Portal Users



To see which users are associated with a company, click 'Portal Users'. Click 'Edit Portal User' (pencil icon) to edit user details.

Account Management

There are two ways to manage accounts on the Sharedband Portal:

- Click 'View Accounts' (top left of screen) to see a list of all your accounts; or
- Click 'Company Management' (below 'View Accounts'), followed by 'Edit Company' (pencil icon) and 'Accounts' (cog icon) to see all the accounts for a given company.

Add account

To add an account, select 'Actions' followed by 'Add Account' from the **View Accounts** screen or 'Add Account' from the **Edit Company** screen. You will be prompted to enter the following information.


- Company — either select an existing company from the drop-down box or enter the name of a new company
- Country — country
- Site — location
- NOC — if more than one network operations centre (NOC) is available, select the one you wish to associate the new account with. If only one NOC is available, you won't see this field
- NOC account username — a unique username for the NOC and the customer device
- NOC account password — a password for the NOC account username


- Account name — a friendly name for the account which will be seen by all users with access to the Portal
- Email address — the email address associated with the account
- Number of IPs — the number of IP addresses to allocate to this account
- Number of Lines — the number of lines to allocate to this account

Once you have added the information, click 'Add Account'. You will be redirected to the **View Accounts** summary screen.


Manage accounts

From the **Edit Company** or **View Accounts** screen:

 Click 'Edit Account' to change the account name, number of IP addresses or number of lines, then click 'Save Account'.

 Click 'Login As' to open a new window where you can view service and device status, and edit configuration options. To return to the Sharedband Portal, click 'Log Out' then close the window.

Delete Account

 To delete an account, click 'Delete Account' and 'Delete' when you see the confirmation prompt.

Portal User Management

Portal User Management allows you to create, edit and remove Portal users and associate them with specific companies. To see the **Portal User Management** default screen, click 'Portal User Management' at the top left of your screen.

Search Users

Search for particular users using the 'Search portal users' facility; enter all or part of a user's name or email address and click 'Search'. Click 'Reset' to clear the search.

Add Portal User


Click 'Portal User Management' followed by 'Add User' to create a new Portal user. Follow the prompts to add name, email address, password, account type and permissions, and click 'Add Account' to submit. Once you have successfully added a new user, you will see the **Edit Portal User** screen.


User permissions

When you add a reseller user, you are given the option to give read-only or full access to the Portal. Read-only access will allow the user to log in and view account information only; full access offers the user all of the permissions of the current (parent) account, with the exception that they will be unable to edit or remove the parent account.


When you add a standard (non-reseller) user, they will be given read-only access and will only be able to view their allocated accounts

Edit Portal User

 To edit a Portal user's details, click 'Portal User Management' at the top left of your screen. Then, click 'Edit Portal User'. You will access this screen automatically when you add a new user.


 Click 'Information' to edit a user's basic information — name, email address, password, user type and

permissions — and to activate and deactivate their access.

 Click 'Companies', select a company from the pull-down menu and click + to associate a company with the user.

 To remove access to a given company, select 'Delete Company Access' and 'Delete' when you see the confirmation message.

Delete Portal User

 To delete a user from the Portal, click 'Portal User Management', then 'Delete Portal User'. Click 'Delete' when you see the confirmation message.

Edit my user account

To edit your own user account click on the "Logged in as [username]" link shown in the header area of your screen.

Edit your name, email address and/or password, then click 'Save Account'.

When you edit your account details, the Portal automatically closes your current session and opens a new one with the new details.