



Manage2

Managing Your cPanel Licenses

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About the Presenter

My name is Christopher Banaszek and I am the Accounts Coordinator for cPanel, Inc. I handle all new Partner NOC and Distributor applications and account setups. I'm also responsible for helping with accounts once they have been setup for any licensing, billing or account related questions or issues

I have been working for cPanel and with all of our Partners and Distributors since October of 2002



Presentation Introduction

This presentation will focus on features of the Manage2 Interface, how to use them and how they can be beneficial to your company

All of the features listed in Manage2 will be covered, however, we will be focusing on those features that are most beneficial in managing your account

You have been provided a copy of the “Manage2 Guide” to reference. There will be time to answer questions at the end of the session

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Main Topics / Key Points

- »» Welcome to Manage2!
- »» Configuring the Manage2 Interface
- »» Keeping on Top of Your Licenses
- »» Account Security
- »» Billing & Automatic Payments
- »» Updating Company Information
- »» Using Additional 'Users' and 'Groups'
- »» Direct Licenses (Purchasing & Managing)
- »» Utilizing Priority Support



Welcome to Manage2!

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Welcome to Manage2!

»» After logging into the Manage2 Interface you will be taken to the main screen

Welcome to Manage2! (cont.)

- »» The top bar includes options to navigate to other cPanel pages, configure your interface, contact us or logout
- »» Beneath the 'Welcome' message you will see Automation tools, Public Profile and Documentation



We Want to Hear From You!

»» Our Feedback Form allows you to provide input on your experiences with cPanel

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Features and Sections

- »» Features are grouped together in sections according to functionality (Add License and List Active Licenses are under 'Licenses')

Special Events

»» This feature shows upcoming special events, such as our Training Seminar, as well as some important information regarding the event

Configuring the Manage2 Interface

Configuring the Manage2 Interface

- »» The Manage2 Interface comes with a default setup
- »» Configuring the Manage2 Interface will allow you to more easily find the features you need

Configuring the Manage2 Interface (cont.)

- »» The Configure Interface feature in the top bar allows you to move sections around by changing the default numbers
- »» The numerical order (low to high) determines the order of the sections in your Manage2 Interface

Configuring the Manage2 Interface (cont.)

- Rearranging that numerical order will allow you to move sections to an order that better suits your use of the Manage2 Interface

Configuring the Manage2 Interface (cont.)

»» After saving your changes, the main screen will now show sections in their new order

Hiding Features

» You can also hide features that you do not use as often so they do not clutter up the interface

Retrieving Features

»» Those hidden features can then be retrieved in the future should you need to use them

Keeping on Top of Your Licenses

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Adding Licenses

- »» Using the right information when adding licenses can prevent billing issues. Make sure to select the correct package and group when adding new licenses

List Active Licenses

- » Viewing List Active Licenses will allow you to see all licenses on your account. You should monitor your licenses as often as possible
- » From this screen you can see some information for each license as well as some actions you can take

Expiring Licenses

- Expiring unused licenses prior to the billing date (the 15th of each month) will ensure you are not being billed for any licenses you are not using

Expired Licenses Reason

- » Providing a reason when expiring a license allows you to later view that reason under the List Expired / Suspended Licenses feature

Other Ways to Keep on Top of Your Licenses

- »» Some other useful features in this section include:
- Recently Added Licenses
 - Rejected License Requests
 - Search for a License
 - Transfer a License

Account Security

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Access IPs

- »» Access IPs allow you to select exactly who can access your account
- »» Placing an asterisk (*) in the last field will allow you to add a range of IPs

Change Password

- »» Choosing a password that will not easily be guessed will ensure that your account access is secure

Security Questions

- » Security Setup offers an additional layer of security
- » We strongly recommend setting up the security questions for your account
- » Provide access where needed

Billing & Automatic Payments

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Billing – Account History Screen

- »» The Account History Screen shows all payments, invoices, late fees and deposits
- »» This screen will also allow you to view and print past invoices
- »» You also have the ability to select which types of transactions are shown, or to search for a transaction by the amount
- »» You will also find your Account Number on this page, which should be used for all payments and correspondence to cPanel, Inc.

Billing (cont.) - Past Due Account

- »» When an account becomes past due:
 - Past-due invoices will be highlighted
 - It will show how many days past-due that particular invoice is

Billing (cont.) - Past Due Account

- »» If an account is current, the Manage2 Interface will look as it always does

Billing (cont.) - Past Due Account

- »» When an account becomes past due, not only does the Account History screen change, but a yellow bar will appear on the main screen of Manage2

Billing (cont.) - Suspended Account

- » If the account becomes suspended:
 - A red bar will appear above the yellow past-due bar
 - Your account access will be limited to account history and payments

Billing (cont.)

- » Account History Tracker will show your license count by month (at invoice time) so you can view your licensing trends
- » The current usage screen shows the same thing as the List Active Licenses screen (this may be one of the features you choose to hide)
- » Paying via PayPal using the Manage2 Interface will ensure that your payment is automatically posted to your account

Billing (cont.) - Credit Cards

- »» The Manage and Pay With Credit Cards feature allows you to:
- Add new credit cards to your account
 - Make immediate payments
 - Setup automatic recurring payments

Billing (cont.) - Credit Cards

- »» Once you setup the card and we have the appropriate form, the card will be approved for use
- This does *not* set you up for automatic payments as that requires an additional step
- »» Make an Immediate Payment allows you to use an approved card to make a one time payment

Billing (cont.) - Automatic Payments

- » Initiating an Automatic Payment allows you to:
 - Select how many days before the due date you would like the payment to be made (3 days is the default)
 - Choose what will be paid
 - Divide the payments between 2 or more cards
 - Issue priority numbers for your credit cards

Billing (cont.) - ACH Payments

- » You can also use Setup Automatic Payments to sign up for ACH
- » Once enrolled, your bill will be automatically paid out of your US checking or savings account 3 days prior to the due date (this may change depending on weekends and holidays)

Updating Company Information

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Address Book

»» Address Book allows you to add, view and update addresses for your company

Add a New Address

- »» When adding a new address, you can select a name for the address (Billing Address, etc..) and choose what information to enter

Update Company Information

»» Company information is used by cPanel to contact you regarding your account

Public Profile

- »» Having your Public Profile complete will allow potential customers to find you through the Partners page on our website
- »» This will also allow you to customize what potential customers see in terms of your company profile, contact information and logo

Additional Groups and Users

Groups

- Adding additional groups will allow you to break down your licenses by company/customer for easier viewing
- Placing an asterisk (*) after the group name allows the group to be shown initially under Add License
- To change the group name for a license, use the View/Modify feature
- Other features include:
 - Edit Group
 - List Groups



Logo

»» This feature generates an 'Authorized cPanel Partner' logo with your company name on it that you can display on your website



Manage Authorized Logo

Small	Authorized cPanel Partners Training Seminar Test Company
Medium	Authorized cPanel Partner Training Seminar Test Company
Large	Authorized cPanel Partner Training Seminar Test Company

Packages

- »» Each package in your account is for a different type of license

TRAININGSEMINAR-INTERNAL

TRAININGSEMINAR-INTERNAL-VPS

TRAININGSEMINAR-INTERNAL-VZZO

- »» List Packages will show you what packages you have available and what the monthly cost is per package

Users

» You can add additional users that have their own login information and account access

Managing Users

- »» When setting up a new user, they will automatically be setup with a (-10) user level, meaning it will be a sub-user of the main account
- »» You will also be able to set which features the sub-user will have access to (Add a new license, View Account History, Submit Priority Support Requests, etc..)
- »» Update My Information allows you to update the information for your own user account

Direct Licenses

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Purchasing Direct Licenses

- Direct Licenses provide you with another option for offering cPanel to your customers
- As a Partner, you are eligible to receive 30% off the retail price (this discount cannot be combined with any other offers)
- There are 2 ways to purchase these licenses:
 - At the bottom of the Manage2 screen, enter your email address in the space provided
 - Or by going to: <https://www.cpanel.net/store> and selecting Partner / Distributor Login at the bottom of the page

Managing Direct Licenses

- »» Purchasing Direct Licenses via Manage2 / Manage2 login will ensure you receive the proper discount and the licenses are added to your account
- »» Once purchased, you can find your Direct Licenses under the specific type of license in Manage2
- »» These licenses are also listed in order of when they are set to be renewed/expired for easy management
- »» You will also have the option to search for these licenses by email address or company name

Priority Support

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Support – Priority Support

- »» Priority Support allows you to submit billing, sales and technical support tickets into our system that will show up as priority
- »» Priority tickets inform our staff that you are a current cPanel license holder or reseller.
- »» Before you can use Priority Support, you will need to make sure your Manage2 Account is linked with the cPanel Ticketing System

Support (cont.) - Linking Accounts

»» To link accounts:

- Go to Submit a New Priority Support Request
- Enter the IP address of one of your licenses
- Click “Go”

»» If you receive the error page shown here, you will need to add an email address to your user

Support (cont.) - Linking Accounts

- »» Once you have added your email address, repeat the steps to link accounts. You should now see directions for linking the accounts

Support (cont.) - Linking Accounts

- »» A “Link Key” will be sent to the email address you entered. You will need to enter that key in the space provided to link the two accounts together
- »» The next screen will be the welcome screen for the cPanel Ticketing System

Support (cont.) - Linking Accounts

- » Here you will be able to:
- Open a new ticket
 - View open and closed tickets
 - See which tickets require a response from you

Questions & Answers

- »» I want to thank everyone for coming to the Training Seminar and for your attention on this topic
- »» If you have any questions pertaining to this presentation, please feel free to ask them now
- »» General questions can be asked during our Mass Q&A Session

Please remember: The Manage2 Guide is a very useful resource and is available in Manage2 whenever you need it!