Customer Management Portal Admin Guide

Version 2.0

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Customer Management Portal Overview

Some companies use in-house IT departments to manage and replace printer hardware, to monitor printing supplies, to handle security and analytics, and to perform tasks. For organizations such as this, the PrinterCloud administrator is generally in-house as well (as part of the IT department). This person can easily set up a PrinterCloud instance by opening a browser to www.printercloud.com, clicking **Start Trial**, and then following the setup steps. With the PrinterCloud instance, the administrator can use the Admin Console to configure printers, and the end-users can install printer drivers from the Self-service Portal, and release print jobs from the Release Portal.

Other companies, for whatever reason, opt to pay a Managed Service Provider (MSP) rather than an in-house IT department to manage their print environment (and other technical functions). Because the MSP is not "in-house," managing a PrinterCloud instance would be exceptionally challenging for the MSP. As such, PrinterLogic provides a very unique feature called the Customer Management Portal (CMP) that enables the MSP administrator to create PrinterCloud instances for each of its customers. Any user within the organization or the MSP will be able to log in to the PrinterCloud instance to manage the company's print environment. The following image shows the Customer Management Portal as it would appear for an MSP with the name **PrinterLogic**.
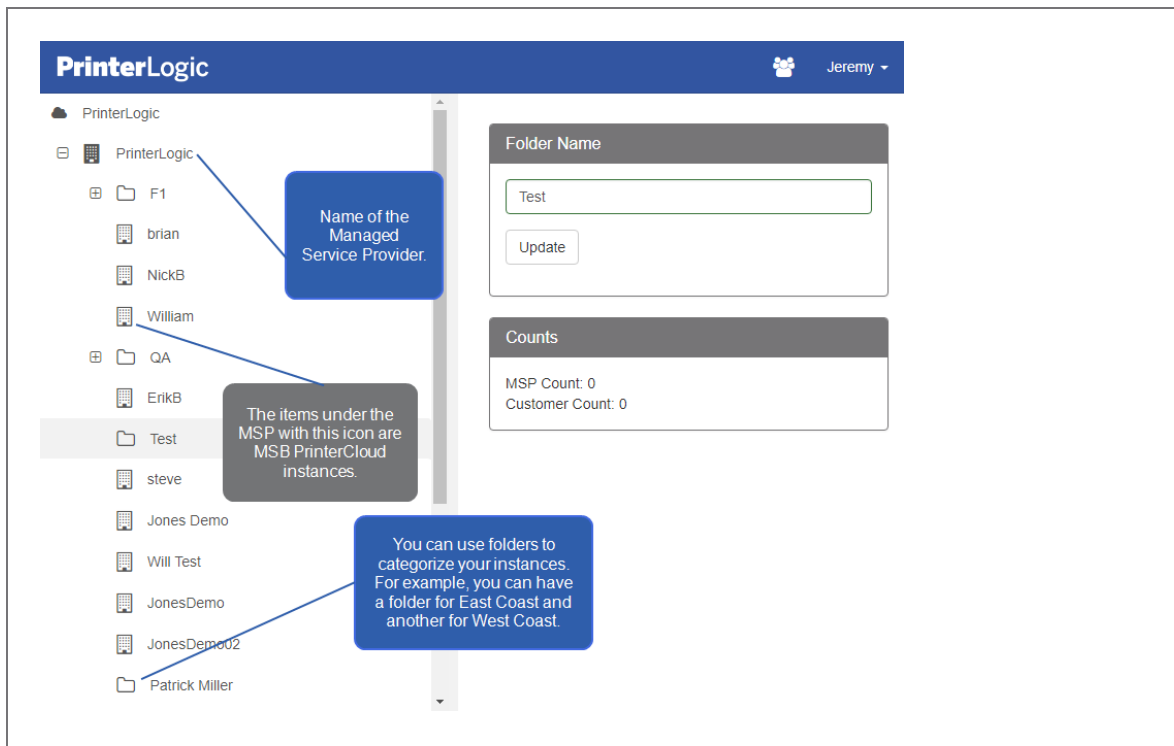
If you are just getting started with the Customer Management Portal, the tree view on the left of the interface will show the name of your Managed Service Provider. Hover over the name of the MSP provider for options to add new folders or new PrinterCloud instances. Setting up each PrinterCloud instance is a simple process of filling out a short form that enables you to customize, in part, the URL used to access the PrinterCloud instance.

NOTE: By default, new PrinterCloud instances created within the CMP have a limit of 50,000 licenses. If more licenses are required, please reach out to your PrinterLogic representative.

In addition to setting up the folders and PrinterCloud instances in the tree, the CMP administrator can also add new user accounts, which give other people in the MSP organization access to the CMP.

Log in to the Customer Management Portal

PrinterLogic will send the initial Customer Management Portal login credentials to the MSP administrator, who can then log in to the Customer Management Portal by opening a browser window and typing www.printercloud-msp.com, which appears as shown in the image here.

Also take notice of the Request Access field, which any administrator can click to request access to the Customer Management Portal.

Logging in to the Customer Management Portal enables the MSP administrator to set up user accounts for other users to be able to log in to the Customer Management Portal and to set up PrinterCloud instances for MPS's customers.

> NOTE: The Customer Management Portal login page provides a Reset Password link in the event you have forgotten your password. You will be provided with a temporary password to log in after which you will be required to enter a new password.

Add a Folder to the Tree

1. Log in to the Customer Management Portal.
2. Hover over the name of the Managed Service Provider.
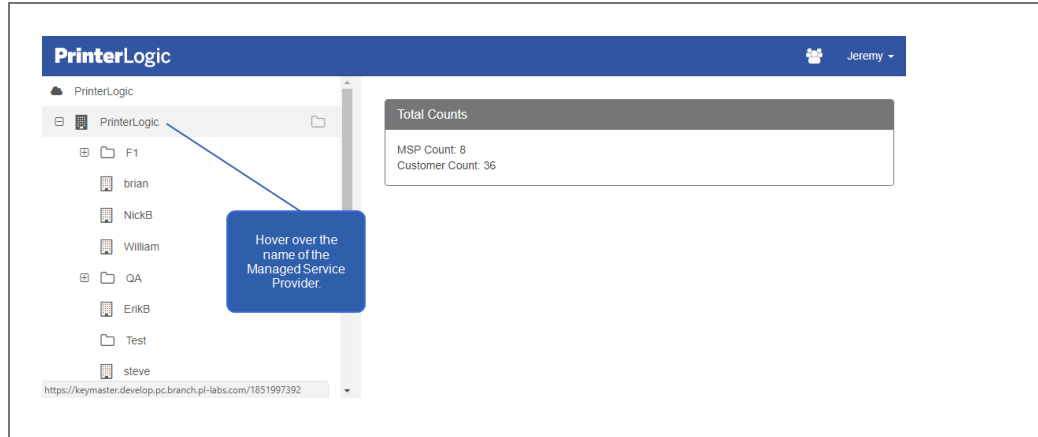
You can also click the plus sign to the left of the name of the Managed Service Provider and then hover over an existing folder.
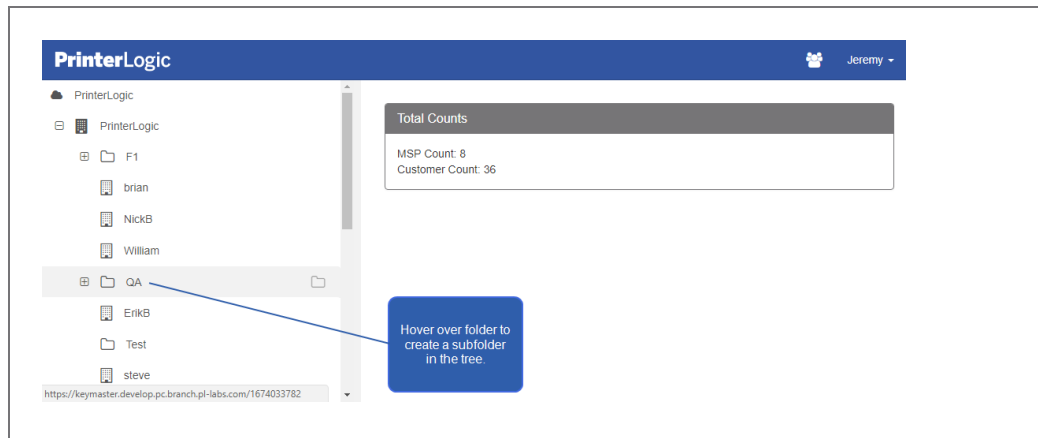
3. Click **Add Folder**.

4. Type the name of the folder.

5. Click **Create**.

You will see the new folder appear in the tree.

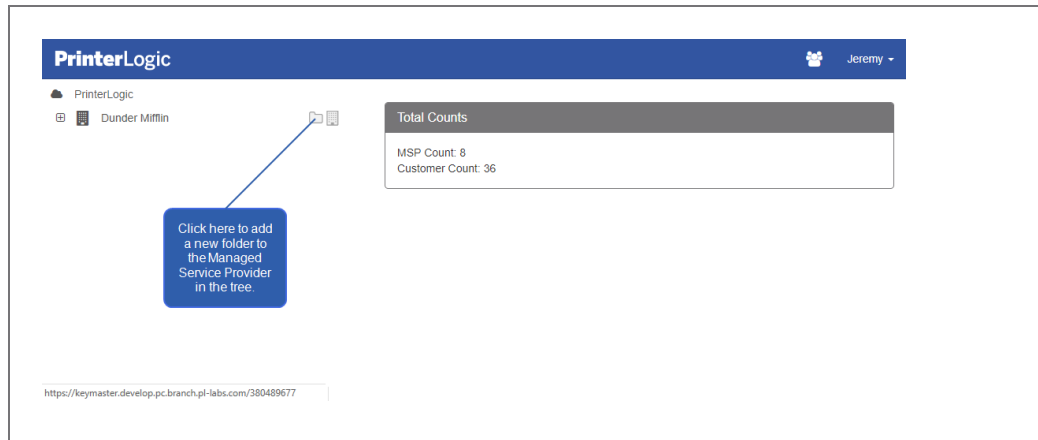## Add PrinterCloud Instance to the CMP

1. Log in to Customer Management Portal.
2. Hover over the name of the Managed Print Services Provider or any folder in the tree.

If your user account has permissions to add a PrinterCloud Instance to the CMP, then you will see the Add Customer icon appear as shown below.
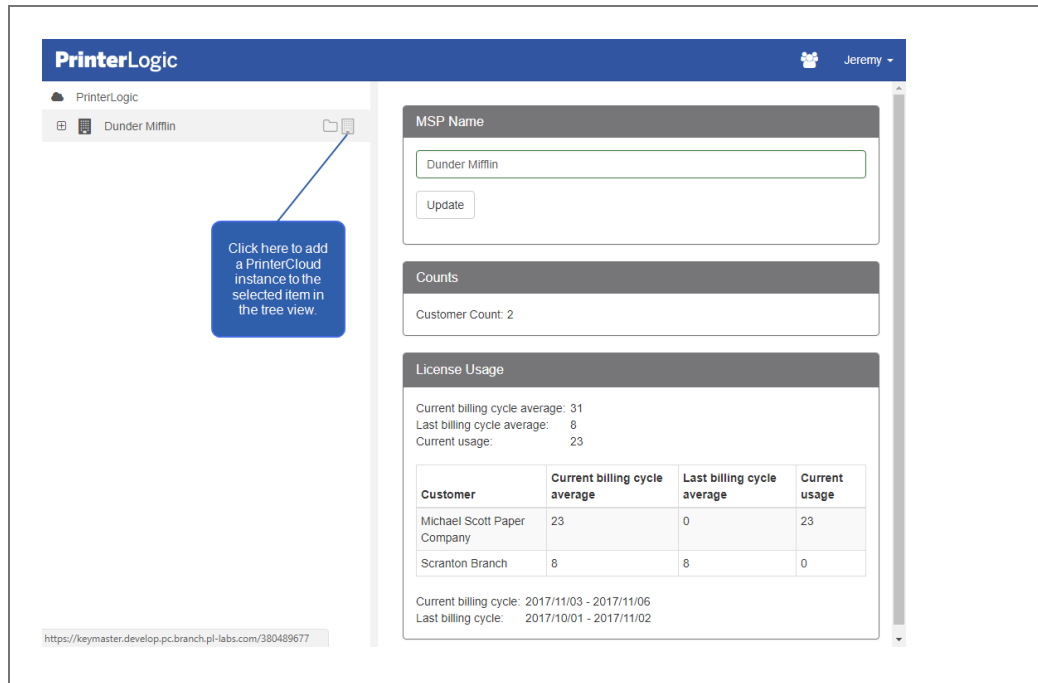
3. Click **Add Customer**.

4. When the Create New Customer window appears, type the customer name and the friendly name your customers will use to access the PrinterCloud Admin Console, Self-service Portal, and Release Portal.

5. Click **Create**.

After you create a PrinterCloud instance in the CMP, the name of the instance appears in the Customer Name field.

Log in to the PrinterCloud Instance from the CMP

1. Log in to the Customer Management Portal.
2. Expand the tree to show all customer PrinterCloud instances.
3. Select the instance you would like to open.
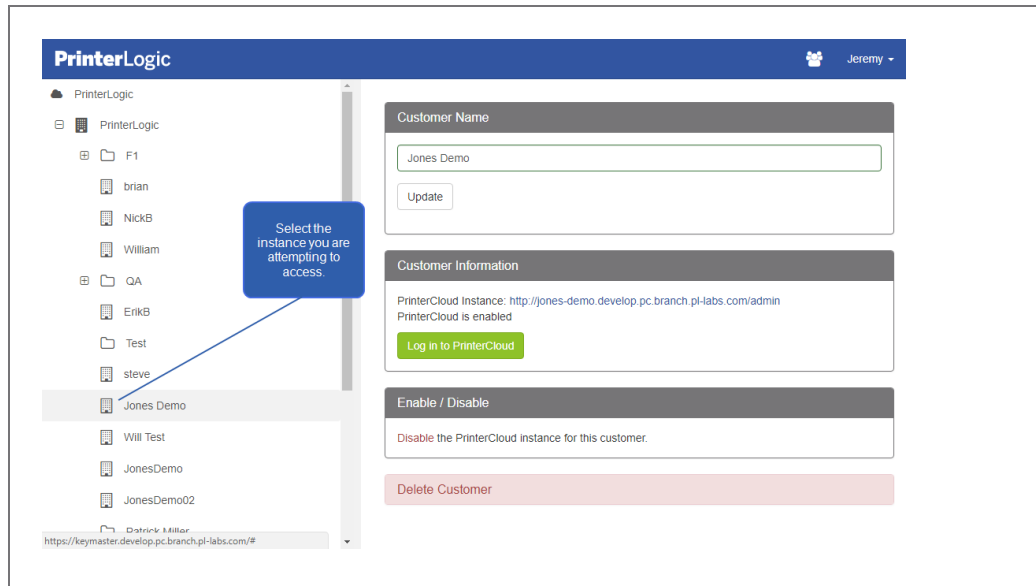
4. In the Customer Information field, click **Log in to PrinterCloud**.
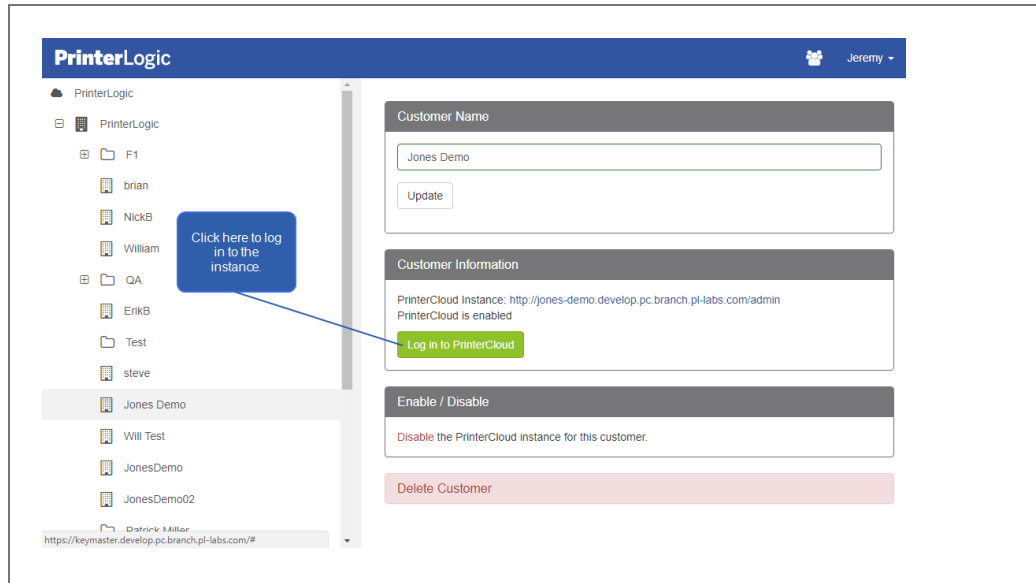
NOTE: You will be required to accept the SaaS agreement the on the

> first time login to the interface. Additionally, when you enter the URL in the browser to sign in to the instance directly, the sign-in information required is the credentials you set when you created the instance rather than the CMP login credentials.

5. The instance will open to the PrinterCloud login page for the instance.
6. If you are logging in to the PrinterCloud instance for the first time, click **Accept** for the SaaS service Agreement.
7. Set up your login credentials for your PrinterCloud access to the Admin Console.

The next time you log in to the Admin Console, you can just enter the URL your browser's address bar rather than accessing it through the Customer Management Portal.

Add a CMP User Account

> **NOTE:** These steps are for providing accounts for additional CMP administrators. These steps are not for setting up PrinterCloud user accounts.

1. Log in to the Customer Management Portal.
2. Click the Users icon.
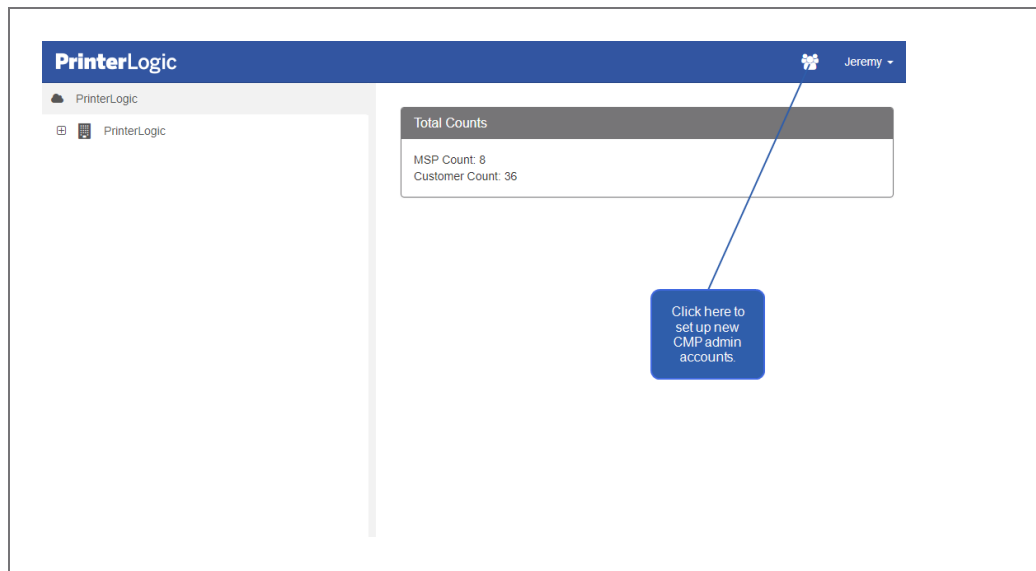
3. When the List Users window appears, click **Add New User**.
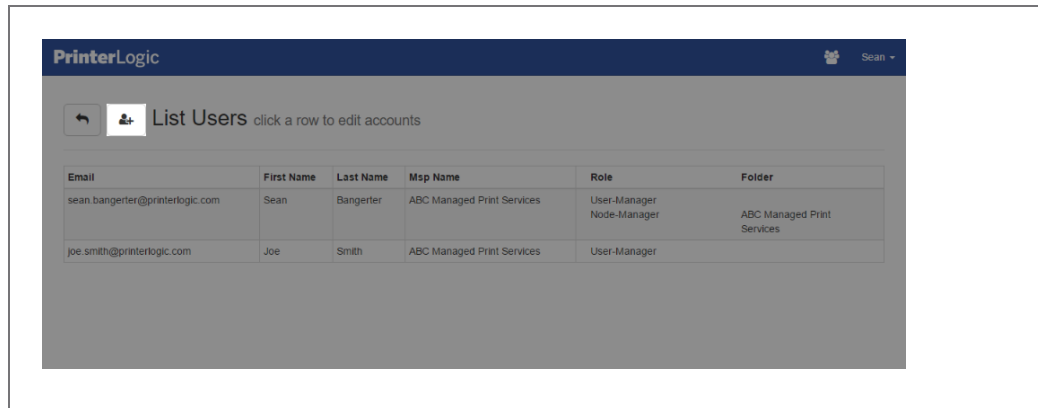
4. In the New User form, fill in all the fields.

5. Click **Add User**.

The new user will appear in the list of users, and you can click the user to edit it at any time. The user can apply the credentials to log in to the CMP.

Enable a User Account to Manage Other Users

1. Log in to the Customer Management Portal.
2. Click the Users icon.
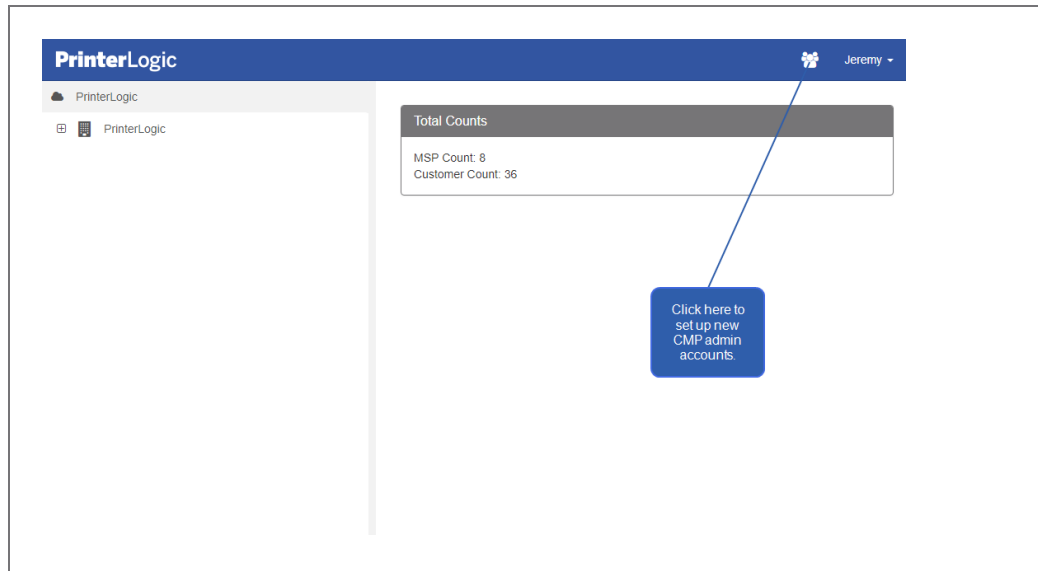
3. Click the user account to which you would like to apply admin rights.
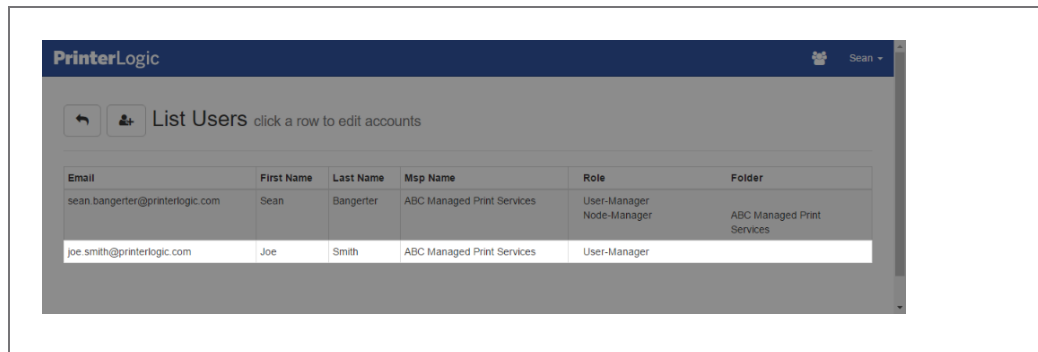
4. Click **Edit User Rights**.
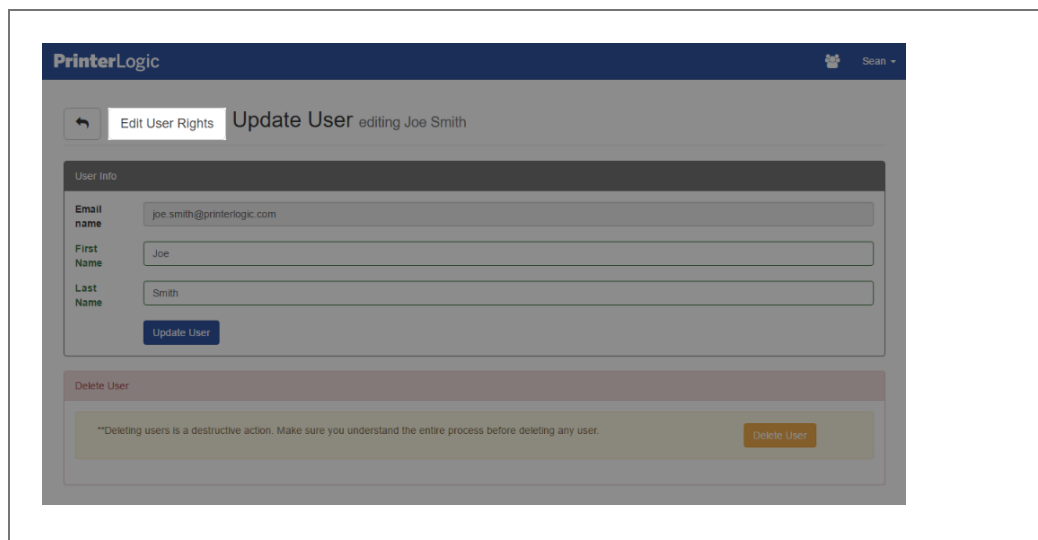
5. Select **This user is allowed to create, edit and delete other users**.
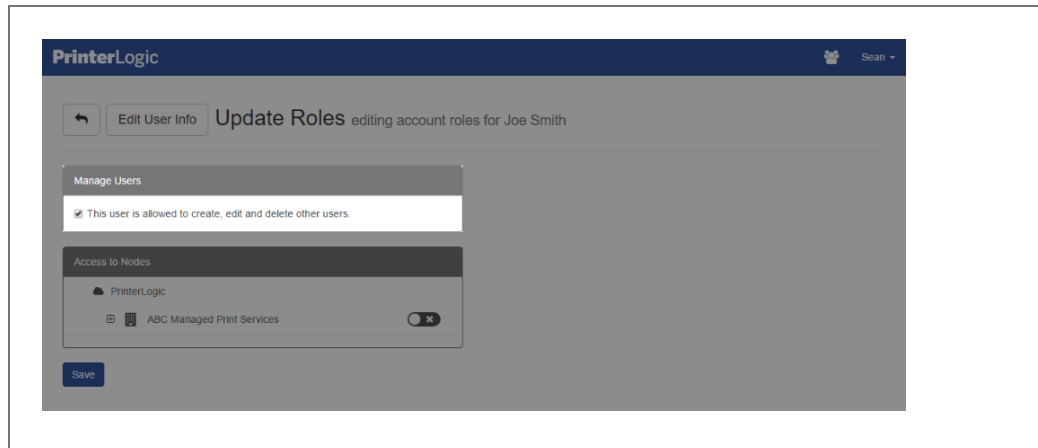
6. Click **Save**.

Apply User Access to Folders or PrinterCloud Instances

1. Log in to the Customer Management Portal.
2. Click the Users icon.
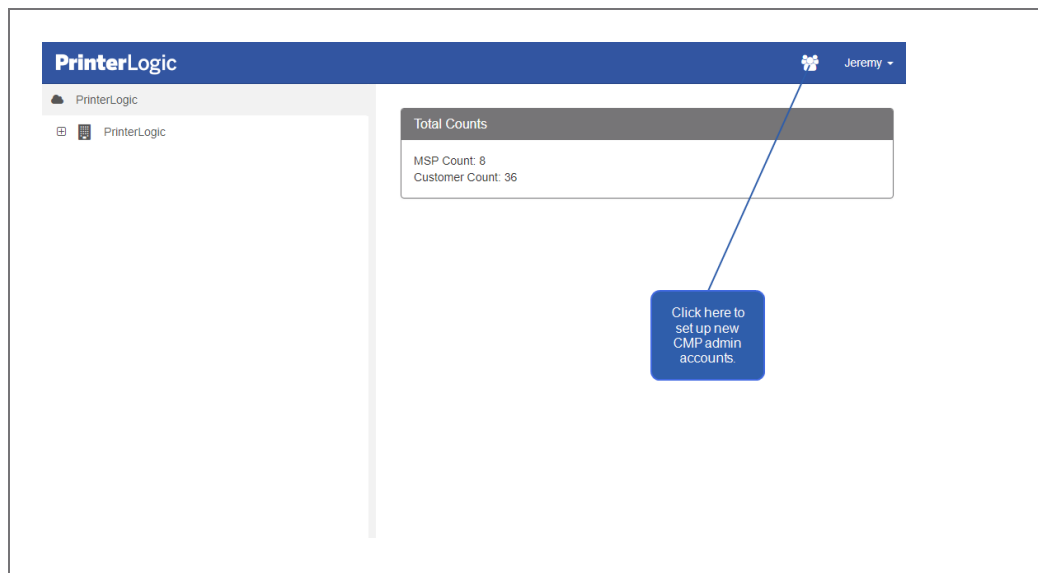
3. Click the user account for which you would like to apply access.
4. Click **Edit User Rights**.

5. In the Access to Nodes section, enable the folders for which you would like to provide access.

Enabling a parent folder automatically enables all the folders and PrinterCloud instances within that folder.

6. Click **Save**.

Calculate License Usage

The Customer Management Portal provides a table that display licenses usage in three different categories. This table is displayed on the landing page of the Customer Management Portal as shown below.

PrinterLogic

a
et
se
QA MSP
moo
moo
testE
0
Mark
R
Raj
Jayrad
Phteven
RootLevel
DevTest
Jeremy
Dunder Mifflin
helloj
PL
hellojr

MSP Name

Jeremy

Update

Counts

Customer Count: 5

License Usage

Current billing cycle: 0
Last billing cycle: 0
Current usage: 20

Customer	Current billing cycle	Last billing cycle	Current usage
MSP Solutions Demo	0	0	0
Test Demo	0	0	4
Another test	0	0	4
Im a customer	0	0	7
MSP Solution Demo	0	0	5

The license data is reported by the date the licenses are utilized rather than from the first to the last date of the month. In other words, if you start using licenses May 5, then the License Usage table will report from May 5 to June 4 rather than from May 1 to June 1. The following sections identify the three sections of the License Usage table and the way in which billing for each is calculated.

Current Billing Cycle

The Current Billing Cycle captures the highest number of printers used in a single day for each instance and counts that number as your daily usage. The Customer Management Portal takes the daily usage for each day in the month and divides that number by the number of days thus far in the billing cycle to calculate the current billing cycle numbers. For example, let's say that Day 1 has a daily usage of 9, Day 2 has a daily usage of 10, Day 3 has a daily usage of 14, and day 4 has a daily usage of 7. Add 9, 10, 15, and 7, which equals 40. Divide this number by 4, and your current billing cycle would be 10.

Last Billing Cycle

The Last Billing Cycle is the average number of licenses used in the last billing cycle. Let's say, for example, your billing cycle runs between the 15th and 14th of each month, and

the current date is June 25. The data that appears in this section will be for May 15 to June 14.

<u>Current Usage</u>

The Current Usage is a snapshot of the current number of licenses under management. This number is not an average.
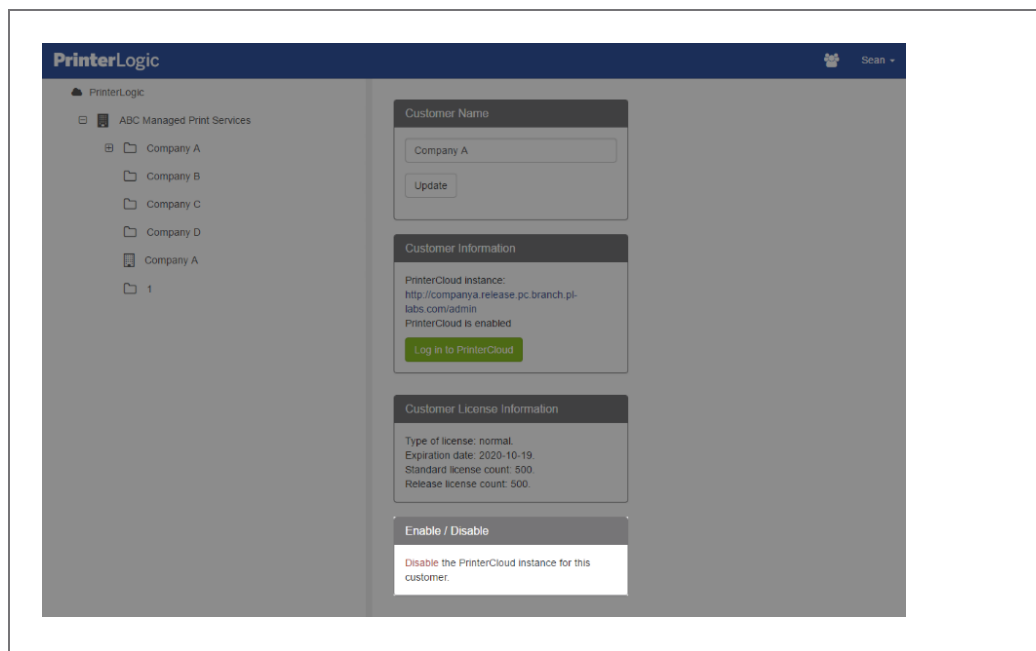
Disable a Customer's PrinterCloud Instance

1. Log in to the Customer Management Portal.
2. In the tree, select the PrinterCloud instance you would like to disable.
3. In the Enable/Disable field, click **Disable**.

The Disable link will change to show **Enable**, which you can use to re-enable the PrinterCloud instance at any time. Disabling an instance will not prevent the customer from printing but will disable the ability to log into and manage the environment. Billing usage will still be captured for billing purposes even if the instance has been disabled.