



Partner Licensing Portal for MSP Partners

Release 2.0

Release Notes

ZixCorp is pleased to present the newest version of the Partner Licensing Portal. This document describes the new features and process changes occurring in Release 2.0.

Business and Technical Roles

In Release 2.0, we are introducing 2 different roles.

BUSINESS ROLE privileges	TECHNICAL ROLE privileges
Product Licensing Requests	Product Licensing Requests
Customer Data Management	Customer Data Management
Monthly Billing and Reporting	

- MSP employees in business and administrative roles are given access to all 3 subsystems: Product Licensing, Customer Data Management and Monthly Billing.
- MSP employees in technical roles are given access to Product Licensing Requests and Customer Data Management. Technical people do not have access to the Monthly Billing subsystem.

IMPORTANT: Technical personnel who currently submit domain key activation requests to the Zix Support Team via our Support website are being transitioned to the Partner Licensing Portal where they will use the new Product Licensing Request feature. On May 30th, all MSP partner technical staff members on file at ZixCorp will be issued login ID's to the Partner Licensing Portal. This is a significant change in current process. The Hosted Gateway Deployment Form will no longer be the means to submit key activations to ZixCorp.

Please make every effort to activate your login ID as soon as you get your welcome email. This will make the transition go smooth. Zix employees will be on hand to assist during the transition.

To learn more about the release, please visit: [MSP Partner Licensing Portal Resource Center](#). This informational page contains a short training video and other helpful resources.

Five new features have been added to the Partner Licensing Portal. We have improved the monthly billing reports and customer data management features and added a new capability for technical employees to submit product licensing requests through the portal.

New Features
BUSINESS ROLE: Billing enhancements to downloadable monthly report The downloadable report includes 5 additional columns containing detailed billing information. Columns have been added to calculate price per unit, pro-rated prices, and total price for the reported term. If the new total number of seats qualify you for a higher-quantity, lower-priced tier, this will be reflected in the price per unit.
BUSINESS ROLE: Visibility to ZixPort service period If your hosted gateway customer has also purchased ZixPort, the system displays the ZixPort service start date, service end date and term length. This makes it easy for you to align ZixPort and Hosted Gateway service periods.
BUSINESS: Sort by customer name in monthly report Partners now have the option to sort customer name when viewing the required and optional license status for the current month. Previously, the system only sorted and filtered customers by license status.
TECHNICAL ROLE: Product Licensing Requests Technical personnel are now able to submit service activation requests in the Partner Licensing Portal. Interactive HELP has been added to guide people through the submission process. Real-time editing allows staff members to associate domains to new customers, add domains to existing customers, or add domains to your own gateway environment.
BUSINESS OR TECHNICAL ROLE: Customer and contact changes We have created a new facility for viewing and updating customer demographic data and contact data. A search and select feature makes it easy to locate an existing customer, view their contacts and make updates. You can also view the list of personnel we have on file as authorized contacts for your own firm.

You will be reminded of these new features when you log into the portal anytime after May 30, 2014.

Announcements

- [+] Product Licensing Requests
- [+] Customer and Contact Changes

You can expand or reduce the announcements as you wish.

Announcements

- [-] Product Licensing Requests
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Billing Enhancement to Downloadable Report – BUSINESS ROLE

The Downloadable Monthly Report includes 5 new columns that help you see the price you are paying per customer. The five new columns are:

- **Price Per Unit:** Annual dollar amount you pay per licensed seat per year... based on 1 or 3 year pricing and your volume based tier
- **Pro-Rated Price:** Price per licensed seat adjusted for co-term or multi-year service periods
- **Total Price:** Total price for the reported term
- **Billing Term:** Term length in months based on the reported service period
- **Type:** Type of license being billed on report (i.e., New, Renewal, Add-on)

If the new total number of billable seats for the current month qualify you for a higher-quantity, lower-priced tier, this will be reflected in the price per unit on the downloadable report. Likewise, a reduction in the total number of billable seats results in a lower-quantity, higher-priced tier. Total report dollar amounts may be issued in one or multiple installments depending on terms.

Customer Name	Term	License Status	Action Needed	Action Taken	Before Seats	Seat Adjustment	Current Month Billable Seats	Price per Unit	Pro rated Price	Total Price	Billing Term	Type	After Seats
Bank 123	12	Renewal due	Required - UPDATED	Admin Action	57		57	\$16.00	\$64.00	\$3,648.00	48	Renewal	57
Medical Clinic 2	12	Renewal overdue	Required - UPDATED	Bill	30		30	\$16.00	\$48.00	\$1,440.00	36	Renewal	30
Industry Credit Union	36	Current	Optional - UPDATED	Admin Action	40	40	40	\$18.00	\$0.00	\$0.00		Add On	80
Dental Office ABC	24	Current	Optional - UPDATED	Coterminus Add On	32	8	8	\$18.00	\$9.00	\$72.00	6	Add On	40
Bank 456	36	Current	Optional - UPDATED	1 Year Add On	30	5	5	\$18.00	\$18.00	\$90.00	12	Add On	35
Doctor Practice XYZ	36	Current	Optional - UPDATED	3 Year Add On	130	5	5	\$16.00	\$48.00	\$240.00	36	Add On	135

Visibility to ZixPort Service – BUSINESS ROLE

If you have a customer who purchased ZixPort in addition to Hosted Gateway seats, we have made service period alignment easier for you. We now display the ZixPort service period next to the Hosted Gateway Service. Handling varies based on license status:

EVALUATION: You can align Hosted Gateway services with the ZixPort term, start date and end date.

RENEWAL: You can co-terminate Hosted Gateway services with the ZixPort service end date.

ADD-ON: If you wish to co-terminate an add-on for Hosted Gateway services with the ZixPort service end date, please select the Contact Zix option. Your Partner Reporting Analyst will make the adjustment as requested.

Pricing for new customers, renewal customers or add-ons to an existing customer will be at 3 year pricing if the customer has also purchased ZixPort with a 3 year term.

CUSTOMER NAME		Action: Bill		
License Status: Evaluation overdue	Hosted Gateway Term: 1	Hosted Gateway Service Start: 09/25/2013 End: 10/24/2013	ZixPort Term: 12	Zixport Service Start: 09/25/2013 End: 09/24/2014

The example above is for an evaluation customer. Notice that the Hosted Gateway Service is for a 1 month term. That is the default service period for newly submitted product licensing requests. The start date matches the date the request was submitted to us. We give you three options for establishing the term length and service period start and end dates.

-- Select One --
Align with ZixPort term, start date, and end date
1 Year: enter start date, end date calculated
3 Years: enter start date, end date calculated

You will be reminded that you have a 4th option.... Contact Zix.

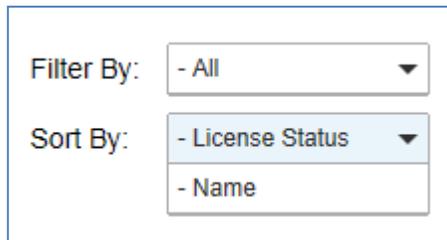
Choose Term Length: *	Service Start Date:	Service End Date:	Term:
Align with ZixPort term, start date, and end date	09/25/2013	09/24/2014	12
Note: If desired term length option not available here, exit this page and select Contact Zix option instead.			

Similar handling exists for renewal customers. The system offers the option to co-terminate the Hosted Gateway service period with the ZixPort service period.

Choose Term Length: *	New Service Start Date: *	New Service End Date: *
Co-terminate with ZixPort service end date	04/19/2014	07/29/2014
Note: If desired term length option not available here, exit this page and select Contact Zix option instead.		

Customer Name Sort on Monthly Report – Business Role

Partner employees who handle monthly billing transactions can sort the monthly report by customer name rather than the default value of license status.

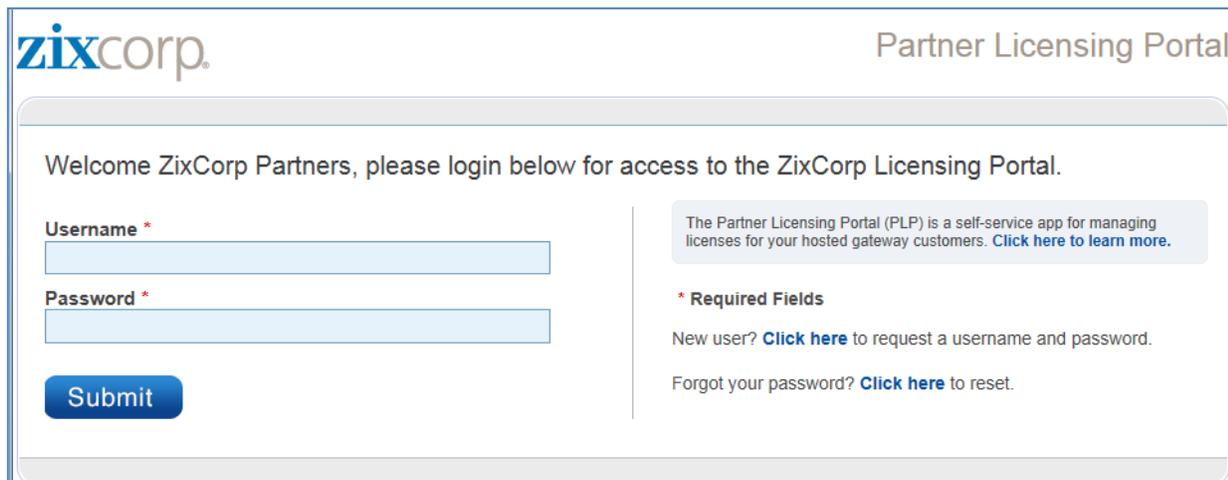


The screenshot shows a 'Filter By:' dropdown menu with '- All' selected. Below it is a 'Sort By:' dropdown menu with '- License Status' selected and '- Name' as an alternative option.

Product Licensing Requests – Technical Role

Technical team members submit key activation requests to the ZixCorp Support Team using PLP's Product Licensing Request feature. They supply customer demographic data and expected seat data at the same time they supply the domain name to Zix. The basic steps:

1. Create (generate) domain key file for your end customer on your Gateway.
2. Login to the Partner Licensing Portal URL: www.portal.zixcorp.com.



The screenshot shows the ZixCorp Partner Licensing Portal login page. It features the ZixCorp logo in the top left and 'Partner Licensing Portal' in the top right. The main content area includes a welcome message: 'Welcome ZixCorp Partners, please login below for access to the ZixCorp Licensing Portal.' Below this are two input fields for 'Username *' and 'Password *', followed by a blue 'Submit' button. To the right of the input fields, there is a light blue box with text: 'The Partner Licensing Portal (PLP) is a self-service app for managing licenses for your hosted gateway customers. [Click here to learn more.](#)' Below this box, there is a section titled '* Required Fields' with two links: 'New user? [Click here](#) to request a username and password.' and 'Forgot your password? [Click here](#) to reset.'

This will take you to the welcome page of the Partner Licensing Portal.



Product Licensing Request

Notifications

FAQ's

Partner Licensing Portal

Welcome to the Product Licensing Request section of the Partner Licensing Portal

MSP Partners submit hosted gateway information and key activations to the ZixCorp Support Team using the Product Licensing Request form. Technical team members at the partners site submit customer demographic data and licensed seat data at the same time they supply the domain name to Zix.

Be sure to generate the domain key files for your end customer on your gateway appliance or virtual instance BEFORE submitting a request for activation to the Zix Support Team.

Customer and contact data management is housed under the Customer List tab. Search for an existing customer by customer name or domain name. Select your own firm or one of your customer records to update demographics or to add, change and delete contacts.

Select Product Licensing Request from the scroll bar at top to view your existing customers. All customers will display, not just those who purchased Hosted Gateway.

Select from the list of current customers if you are requesting activation of:

1. Domain key for a new ZixPort customer
2. Additional domain keys for a current hosted gateway customer
3. Additional domain keys for your partner-owned gateway



Product Licensing Request

Notifications

FAQ's

Customer List

Current Customers

[What's This?](#)
[New Product Licensing Request](#)

Select from this list if you are requesting activation of:

1. Domain keys for a new ZixPort customer
2. Additional domain keys for a current hosted gateway customer
3. Additional domain keys for your partner-owned gateway

Customer Name	City	ST	Licensed Products	Hosted Gateway Seats	Domains
AAA Medical Group	San Bernadino	CA	Hosted Gateway	30	aaadoctor.com aaamed.com
Aardvark Consulting	Chicago	IL	Hosted Gateway	20	aardvark.com aardvark2.com
Absolutely Wonderful	Seattle	WA	Hosted Gateway	22	absolutely.com

When you select an existing customer, a web form opens where you can add up to 3 domains owned by that customer. Select “Activate” or “Activate and Suspend” from the picklist and hit the Submit button.

Product Licensing Request
Notifications
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Customer List

Current Customer - Product Licensing Request [Back to Customer Listing](#)

- Use this form to request up to 3 domain key activation(s) for an existing customer.
- Submit only those domains owned by this particular customer.
- If you wish to activate a suspended key for a domain already on file with Zix, contact support@zixcorp.com to request activation.

Aardvark Consulting

Address 2830 Logan Way Chicago, IL 67867 United States	Contact Captain Kirk Business/Technical 342-222-2121 kirk@startrek.com	Details Seat Quantity:20
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Domain Information

Existing Domains:
aardvark.com; aardvark2.com

New Domain (required) <input style="width: 90%;" type="text" value="aardvark3.com"/>	New Domain <input style="width: 90%;" type="text"/>	New Domain <input style="width: 90%;" type="text"/>
--	--	--

Key Activation State (required)
 [What's This?](#)

If you are adding an entirely new customer, select the blue bar at the right labeled New Product Licensing Request. This will open a blank form for you to fill in. Hit the Submit button when you are done.

New Product Licensing Request

[Back to Customer Listing](#)

1. This form is for new customers. Do not use this form for existing customers.
2. Submit only those domains owned by this particular customer.

Customer Information

Customer's Company Name <small>(required)</small>	Address <small>(required)</small>	Address Continued	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
City <small>(required)</small>	State <small>(required)</small>	Zip/Postal Code <small>(required)</small>	Country <small>(required)</small>
<input type="text"/>	Alabama <input type="text"/>	<input type="text"/>	<input type="text"/>
Your Customer ID	Seat Quantity <small>(required)</small>	Unknown Quantity?	
<input type="text"/>	<input type="text"/>		

Contact Information

Contact First Name <small>(required)</small>	Contact Last Name <small>(required)</small>	
<input type="text"/>	<input type="text"/>	
Contact Email <small>(required)</small>	Contact Phone <small>(required)</small>	Contact Title
<input type="text"/>	<input type="text"/>	<input type="text"/>

Domain Information

New Domain <small>(required)</small>	New Domain	New Domain
<input type="text"/>	<input type="text"/>	<input type="text"/>
Key Activation State <small>(required)</small>	What's This?	
Activate <input type="text"/>		

NOTE: If the system ascertains that you are trying to add a domain to an existing customer, it will re-route you to the existing customer form.

Upon submission, you will receive one of 3 confirmation messages.

Your product licensing request to add domains for an existing customer has been queued for handling by the ZixCorp Support team.

Your product licensing request for a new customer has been queued for handling by the ZixCorp Support team.

Your request to activate additional partner-owned domain key(s) for your company has been queued for handling by the ZixCorp Support Team.

Within 5 minutes, you will receive a notification in your email inbox confirming receipt. The same notification appears in the portal.

Notifications

May Notifications

Transaction Type	Message Type	Company Name	Contact Name	Domain
Contact Maintenance	Add	Aardvark Consulting	Captain Kirk	
Demographic Maintenance	Update	Z - Absolutely Wonderful		
Product Licensing	New Customer	Aperture Optics, Inc.		castle.com nikkiheat.com
Product Licensing	New Customer	Anniversary Celebrations, LLC		anniversary.com

[Home](#) | [Product Licensing Request](#) | [Notifications](#) | [FAQ's](#) | [Customer List](#)

Notifications

Partner Name

May-21-2014 01:53:33 pm

From: donotreply@portalbeta.zixcorp.com

To: egore@zixcorp.com

TEST PORTAL ONLY: **Partner Name** - product licensing request accepted for new customer BW Productions

Your new customer product licensing request for BW Productions has been submitted to the ZixCorp Support Team. A support engineer will respond to you shortly.

Partner Name:

Zix PartnerID: BLO39828

Submitted By: Lori Napier

Zix CustomerID: BWP92034

Customer Name: BW Productions

Customer Address1: 3456 Marina Del Ray Blvd

Customer Address2:

Customer City: Santa Monica

Customer State: CA

Customer Zip: 92034

Customer Country: United States

Customer Contact First Name: Bruce

Customer Contact Last Name: Willis

Customer Contact Email: bruce.willis@diehard.com

Customer Contact Phone: 454-676-8909

Customer Contact Title: Optional Field #2

Your CustomerID: Optional Field

Seat Quantity: 35

Domain Key Status: Activate and Suspend

Domain Name 1: diehard.com

Domain Name 2: diehard2.com

Domain Name 3:

Customer and Contact Management - Business and Technical

Customer data is housed under the Customer List tab. Customers are listed in alphabetical order by name. Domain name is visible in the list. You are able to edit Hosted Gateway customers from this view. On-premise Gateway, ZixOne, ZixMail / ZixPort, and ZixMail only customers are grayed out and cannot be edited here.

Customer Name	City	ST	Licensed Products	Hosted Gateway Seats	Domains
Absolutely Wonderful	Seattle	WA	Hosted Gateway	22	absolutely.com wonderful.com
Anniversary Celebrations, LLC	New York	NY	Hosted Gateway	45	anniversary.com
Aperture Optics, Inc.	Providence	RI	Hosted Gateway	65	castle.com nikkiheat.com
Archway Communications	Thomasville	GA	Gateway ZixPort	2500	archbold.org
ABC Bank Customer	Orlando	FL	Hosted Gateway ZixPort	10	abcbank.com

Select your own firm or one of your Hosted Gateway customer records to [edit customer information](#) or to add, update and delete contacts.

Company ID	Company Name	Contact First Name	Contact Last Name	Contact Email	PLP Privileges	Contact Phone	Actions
<h2>Customer Demographics</h2> <p>Back to Customer Listing</p> <hr/> <h3>Aardvark Consulting edit customer information</h3> <p>Address 2830 Logan Way Chicago, IL 67867</p> <p>Domains aardvark.com; aardvark2.com</p> <p>Add New Contact</p>							
AAR67867	Aardvark Consulting	Captain	Kirk	kirk@startrek.com	n/a	342-222-2121	
AAR67867	Aardvark Consulting	Scott	Ingmand	scott@aardvark.com	n/a	343-434-5666	

The page opens when you want to edit customer demographics on a customer record:

Update Customer Information [Back to Customer Detail](#)

Customer Information

Customer's Company Name (required) Address (required) Address Continued

Aardvark Consulting 2830 Logan Way

City (required) State (required) Zip/Postal Code (required) Country (required)

Chicago Illinois 67867 United States

Your Customer ID Products

Hosted Gateway

Note to Zix

Editing a contact name is handled on this page.

Update Contact - Aardvark Consulting [Back to Customer Detail](#)

Contact Information

Contact First Name (required) Contact Last Name (required) Contact Email (required)

Captain Kirk kirk@startrek.com

Contact Phone (required)

342-222-2121

Note to Zix

You can add a new contact on this page.

Add New Contact - Aardvark Consulting [Back to Customer Detail](#)

Contact Information

Contact First Name (required) Contact Last Name (required) Contact Email (required)

Contact Phone (required)

Note to Zix