



Partner Licensing Portal for MSP Partners

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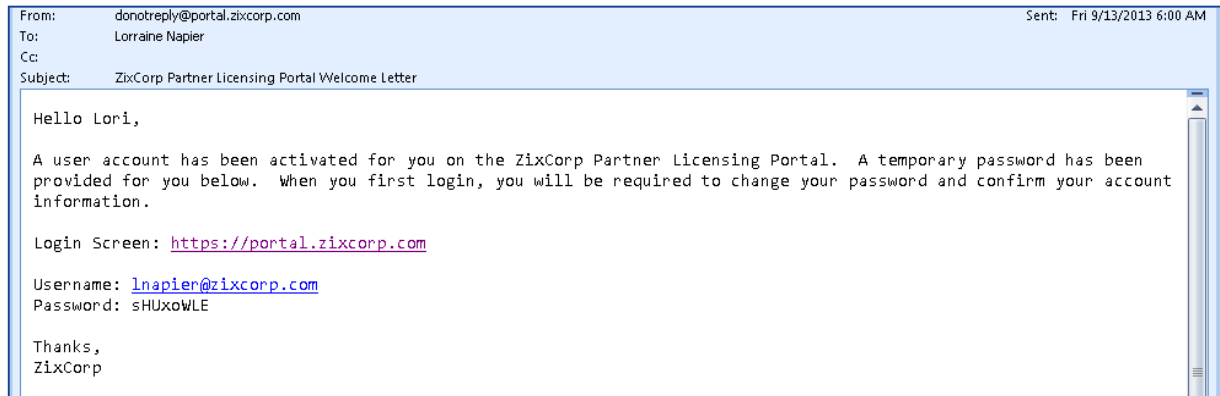
Partner Licensing Portal for MSP Partners

The Partner Licensing Portal (PLP) is a self-service portal where MSP Partners will track and manage licenses for hosted gateway customers. PLP is used by MSP Partners to authorize invoicing for hosted gateway customers, submit request product licensing requests to the Zix Support team and update customer demographic and contact data. Go to <http://go.zixcorp.com/PartnerLicensingPortal.html> to find additional resources to help you navigate PLP and keep current on new developments.

PLP is a secure web-based portal that is accessed using an Internet browser. Only authorized MSP partner employees can access PLP. After you have received your welcome letter and established your login privileges using the temporary password provided to you, you can log into the portal at this URL: <https://portal.zixcorp.com/>.

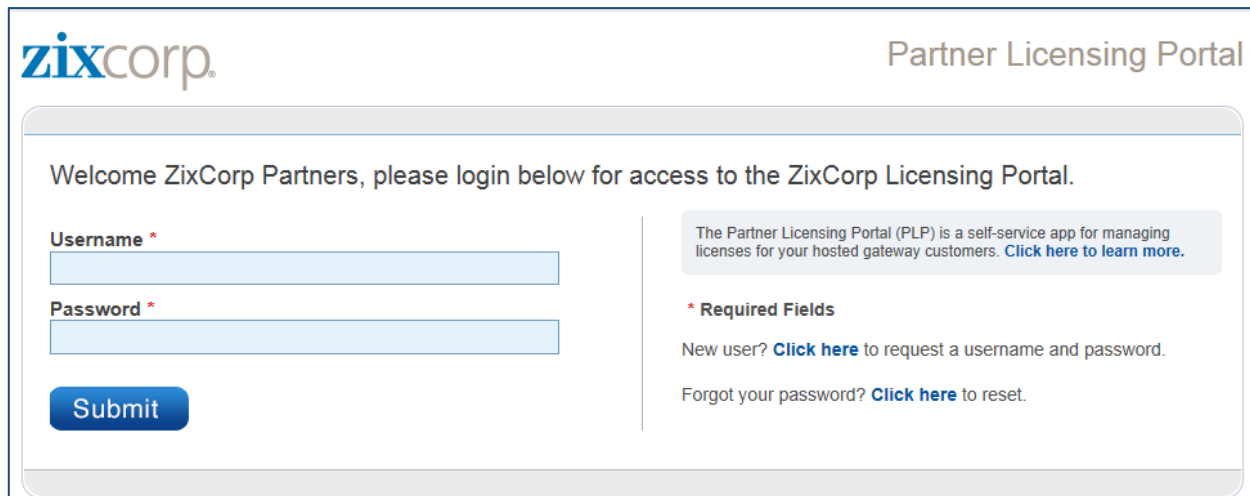
Notice of Account Activation

A few days before our scheduled training session with you, you will receive a notice asking you to activate your login ID. You are provided a temporary password and a link to the portal.



Logging In

Enter your email address and temporary password.



The image shows the login page for the ZixCorp Partner Licensing Portal. It features the ZixCorp logo in the top left and the text "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: "Username *" and "Password *", each with a corresponding text box. A blue "Submit" button is located below the password field. To the right of the input fields, there is a light blue box containing the 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."

Challenge Question

After you enter your temporary password, you will be asked to update your account.

1. Provide a challenge question
2. Verify your temporary password
3. Enter a new password
4. Confirm your new password

The acceptable length and characteristics of your password are explained on the screen.

The screenshot shows a web form titled "Please update your account". It is divided into three main sections: "Challenge Question", "Verify Password", and "New Password".

- Challenge Question:** Contains two input fields. The first is labeled "Please enter a security question: *" and contains the text "Spelling on Tom D's last name". The second is labeled "Please supply an answer: *" and contains the text "Dhwgosh".
- Verify Password:** Contains one input field labeled "Verify your temporary password: *" with masked characters ".....".
- New Password:** Contains two input fields. The first is labeled "Enter a new password: *" with masked characters ".....". The second is labeled "Confirm new password: *" with masked characters "....." and a small circular icon on the right. Below these fields is a blue "Submit" button and the text "* Required Fields".

To the right of the "New Password" section is a green box containing the following text: "Passwords must be at least 8 characters and contain 3 of the 4 following items:" followed by a bulleted list: "Uppercase Letter", "Lowercase Letter", "Number", and "Special Character".

You will receive this account confirmation message.

The screenshot shows a confirmation message on the "Partner Licensing Portal" for "zixcorp". The message is titled "Account Updated" and contains the text: "Your Account Details have been updated. [Click here to login again](#)".

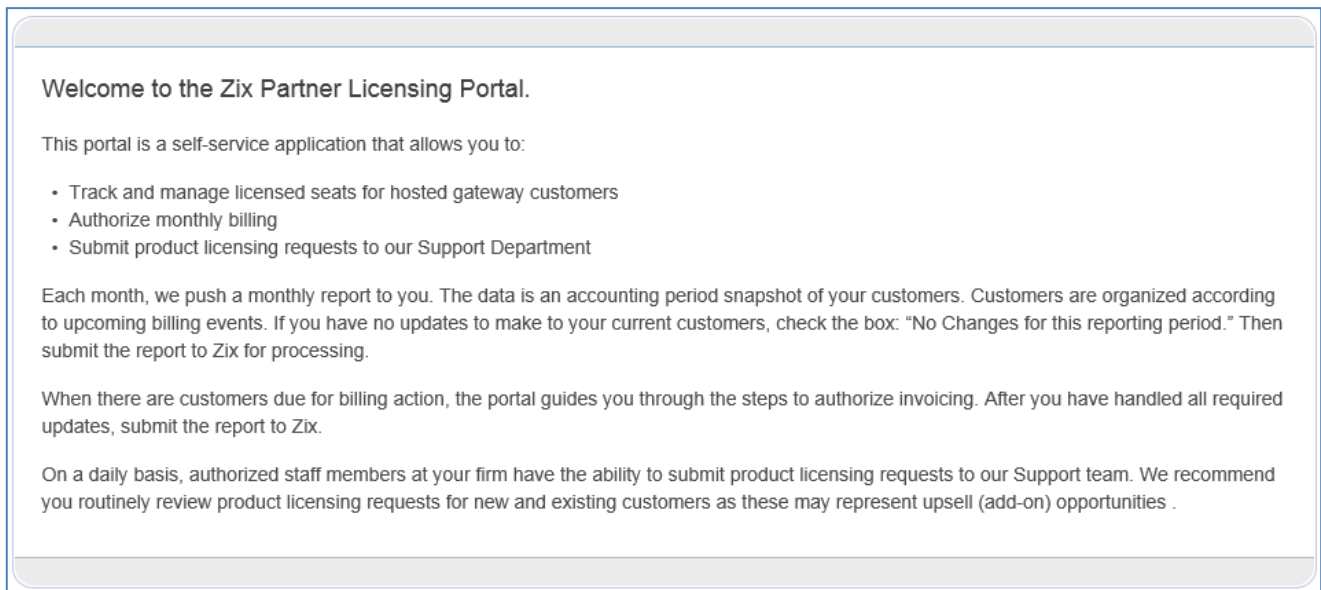
Login again... using your new password.

HOME Page

After logging in, you will land at one of two welcome pages. Depending upon which role you have (business or technical), the welcome page will vary.

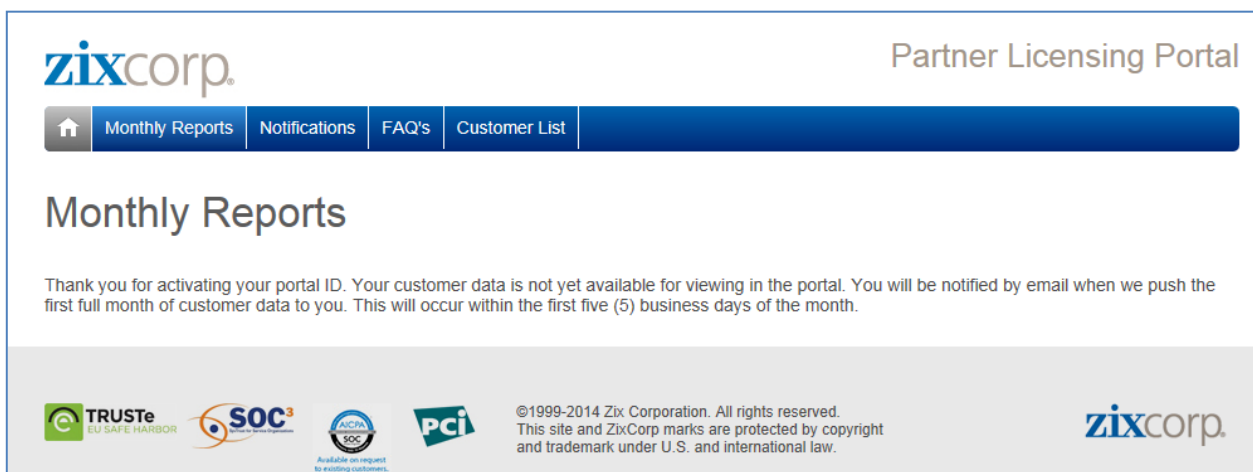
Business Role:

There are 2 major tabs at the top of the page: Monthly Billing and Product Licensing / Customer Management.



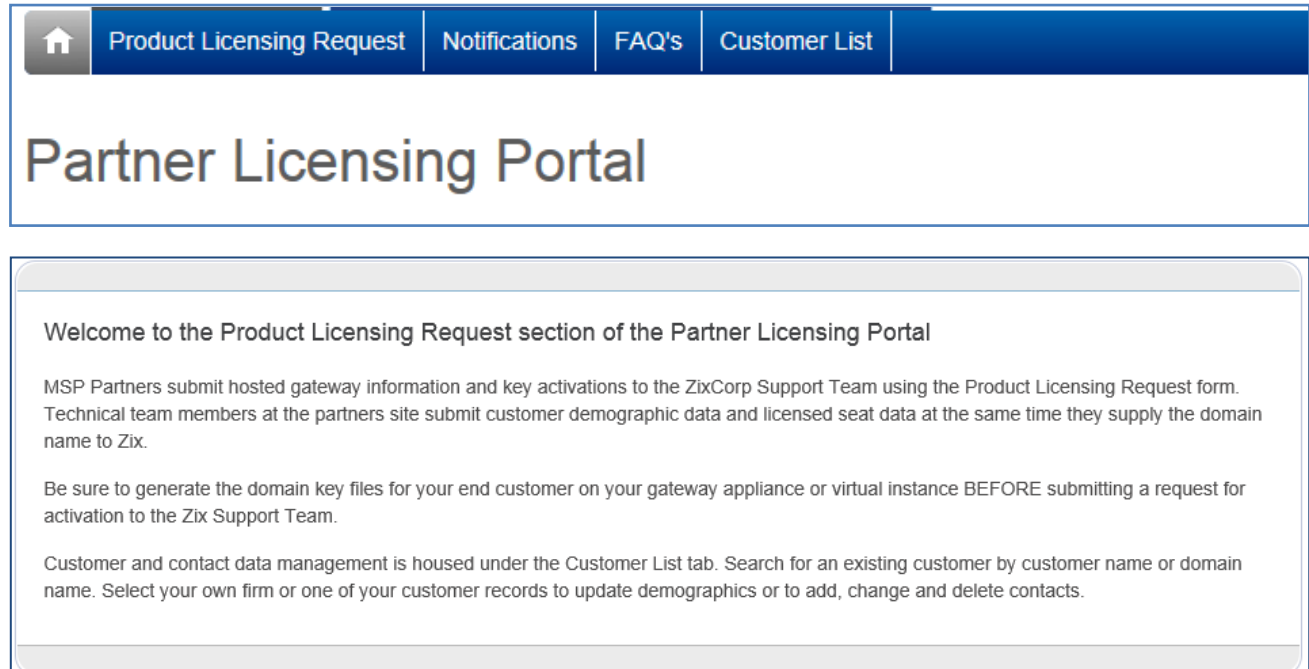
Billing Role: New to the Portal

If you are new to the portal and we have not yet pushed your first month's report data to the portal, you will see this message:



Technical Role:

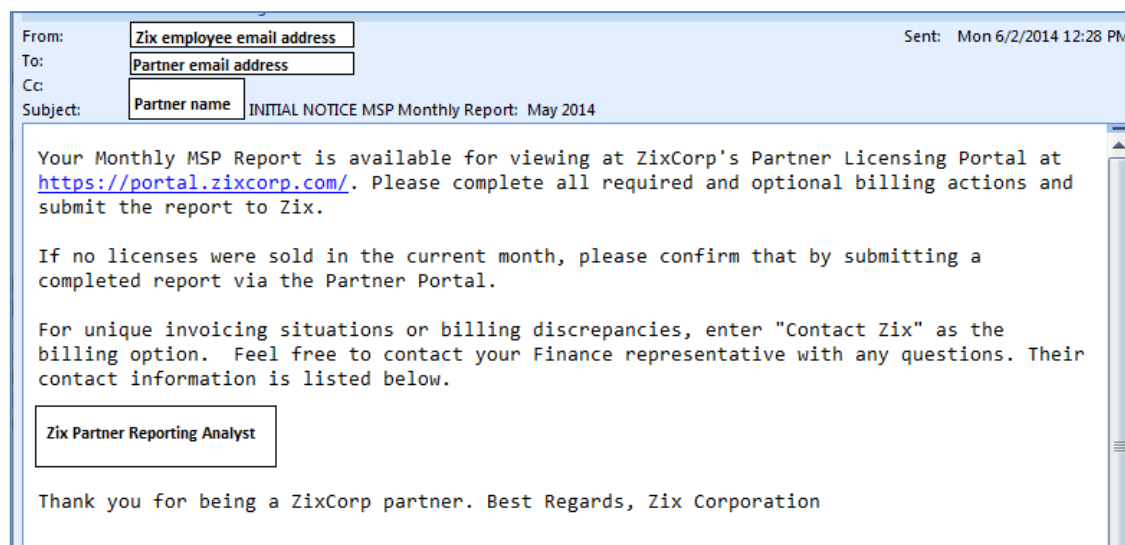
The product licensing / customer management welcome page content for people with Technical Roles:



The screenshot shows the Partner Licensing Portal interface. At the top, there is a navigation bar with a home icon and four tabs: "Product Licensing Request", "Notifications", "FAQ's", and "Customer List". Below the navigation bar, the main heading reads "Partner Licensing Portal". The main content area contains a welcome message and instructions for MSP Partners. It states that 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. It also advises users to generate domain key files for their end customer on their gateway appliance or virtual instance BEFORE submitting a request for activation to the Zix Support Team. Finally, it mentions that customer and contact data management is housed under the Customer List tab, and users can search for an existing customer by customer name or domain name, select their own firm or one of their customer records to update demographics or to add, change and delete contacts.

Monthly Report Handling

Zix issues new monthly reports on or before the 5th business day of each month. You will be notified when the report is available for viewing. The notification email includes the link to the Partner Licensing Portal: <https://portal.zixcorp.com>.



The screenshot shows an email notification from Zix. The header information includes: From: Zix employee email address, To: Partner email address, Cc: Partner name, Subject: INITIAL NOTICE MSP Monthly Report: May 2014, and Sent: Mon 6/2/2014 12:28 PM. The main body of the email states: "Your Monthly MSP Report is available for viewing at ZixCorp's Partner Licensing Portal at <https://portal.zixcorp.com/>. Please complete all required and optional billing actions and submit the report to Zix." It also includes instructions for reporting if no licenses were sold and for handling unique invoicing situations or billing discrepancies. The email is signed by a Zix Partner Reporting Analyst.

After logging in, navigate to the Monthly Reports Tab.

Monthly Reports Tab

As a first time user, you will see only one report. It will have a report status = New. You can make changes to New, Incomplete, or Complete reports. You cannot make changes to reports with a status of Submitted or Approved.

August 2013

SEAT COUNT
CURRENT/NEW
3258

Report Status: New

Last Notification: Final Notice

Notification Date: 09/18/2013

Report status varies depending upon the last action taken by you and/or Zix to authorize invoicing. Only the current monthly report is editable. All other reports are presented in a read-only archive format.

Clicking on a current report takes you to a display of all customers and their licenses in your MSP program.

1. You will need to take action on renewal and evaluation customers....they are highlighted with a Required Action button and sort to the top.
2. You can optionally take action on current customers....they are highlighted with an Optional Action button.

Required Actions per License Status

On a default basis, customers with Required Actions sort to the top. Colors indicate License Status.

Monthly Reports » May 2014 (New) Filter By: - All

Sort By: - License Status

[Download May 2014 Report](#)

AAA Elementary

SEAT COUNT
CURRENT / NEW
45

Required Actions	Action Taken:	License Status:	Service Start:	Service End:	Term:	Domain(s):
Required Actions	None	Renewal due	05/22/2012	05/21/2014	24	

AAA Medical Group

SEAT COUNT
CURRENT / NEW
30

Required Actions	Action Taken:	License Status:	Service Start:	Service End:	Term:	Domain(s):
Required Actions	None	Renewal overdue	04/22/2013	04/21/2014	12	

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SEAT COUNT
CURRENT / NEW
20

Required Actions	Action Taken:	License Status:	Service Start:	Service End:	Term:	Domain(s):
Required Actions	None	Evaluation due	05/22/2014	06/21/2014	1	

Absolutely Wonderful

SEAT COUNT
CURRENT / NEW
22

Required Actions	Action Taken:	License Status:	Service Start:	Service End:	Term:	Domain(s):
Required Actions	None	Evaluation overdue	03/16/2014	04/15/2014	1	

You can sort your customers by License Status or Customer Name.

Filter By: - All

Sort By: - License Status
- Name

You can filter by License Status to check who is due for billing decisions.

Partner Licensing Portal

Filter By: - All
- Evaluation Due
- Evaluation Overdue
- Renewal Overdue
- Renewal Due
- Current
- NFR

Completion of Required Items on the Report

Partners are responsible for completing all Required Actions (and, if applicable, any Optional Actions) within 5 business days of report receipt. Once you complete all Required Actions, enter any add-on seats for existing customers. If you have unique invoicing situations you need to discuss with the Zix Finance department before submitting the report, call your Zix Reporting Contact for resolution. Alternatively, enter “Contact Zix” as the billing option. When you have finished all required and optional billing actions, submit the report to Zix.

The actions you take will vary based on the license status of each of your customers.

Current Month's Individual Customers	Required Handling	License Status	Billing Options			
		Evaluation Due	Bill	Cancel	Contact Zix	Defer Action
		Evaluation Overdue	Bill	Cancel	Contact Zix	
		Renewal Due	Bill	Cancel	Contact Zix	Defer Action
	Renewal Overdue	Bill	Cancel	Contact Zix		
	Optional Handling	License Status	Billing Options			
		Current	Co-Terminus	1 Year Add On	3 Year Add On	Contact Zix
		NFR		1 Year Add On	3 Year Add On	
		Submit to Zix				

Expressed as text:

License Status	Options available for Required Actions
EVALUATION DUE: Customer has been evaluating the product for less than 30 days.	Four options: <ol style="list-style-type: none"> 1. Choose "Bill" to authorize invoicing. 2. Choose "Defer Action" to extend the evaluation period another 30 days. 3. Choose "Cancel" to indicate the customer does not wish to move forward. 4. Choose "Contact Zix" to initiate a dialogue with Zix.
EVALUATION OVERDUE: Customer has been evaluating the product for more than 30 days.	Three options: <ol style="list-style-type: none"> 1. Choose "Bill" to authorize invoicing. 2. Choose "Cancel" to indicate the customer does not wish to move forward. 3. Choose "Contact Zix" to initiate a dialogue with Zix.
RENEWAL DUE: Customer is due to renew.	Four options: <ol style="list-style-type: none"> 1. Choose "Bill" to authorize invoicing. 2. Choose "Cancel" to indicate the customer does not wish to renew. 3. Choose "Defer Action" to defer invoicing decision for another 30 days. 4. Choose "Contact Zix" to initiate a dialogue with Zix.
RENEWAL OVERDUE: Customer is overdue for renewal.	Three options: <ol style="list-style-type: none"> 1. Choose "Bill" to authorize invoicing. 2. Choose "Cancel" to indicate the customer does not wish to renew. 3. Choose "Contact Zix" to initiate a dialogue with Zix.

For each customer with a required action for the current month, you select which action to take.

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Required Actions ▼ - Bill - Cancel - Defer Action - Contact Zix	Action Taken: None	License Status: Evaluation due
--	------------------------------	--

Bill, Cancel, Defer Action, or Contact Zix

In this example, the user selects the "Bill" action for a customer whose license status = Evaluation Due.

1. Decide whether or not to add or remove seats
2. Choose a Term Length: 1 Year or 3 Years
3. Choose a Service Start Date

The system calculates the Service End Date.

B Movies Incorporated Action: Bill

License Status: Evaluation due Hosted Gateway Term: 1 Hosted Gateway Service Start: 05/22/2014 End: 06/21/2014

Domain(s): **bmoviesinc.com**

CURRENT SEAT COUNT 25 Remove Seats

+ Add Seats

Add Seats *(Do not include current seats.)*

Reset

New Total Seats: 25

Choose Term Length: * Service Start Date: Service End Date:

-- Select One --

1 Year: enter start date, end date calculated

3 Years: enter start date, end date calculated

Submit

Here are samples of Actions Taken on customers. Notice how the application displays the current and new seats side-by-side in the Seat Count box. This is a visual cue to help you see when action has been taken on any given customer.

Adventures in Canada, Inc.								SEAT COUNT CURRENT / NEW 15/25
Change Action	Action Taken: Bill	License Status: Evaluation due	Service Start: 05/27/2014	Service End: 06/26/2014	Term: 1	Domain(s):		
Advertising R US								SEAT COUNT CURRENT / NEW 15/20
Change Action	Action Taken: Bill	License Status: Renewal overdue	Service Start: 04/16/2013	Service End: 04/15/2014	Term: 12	Domain(s):		
All Day Long, LLC								SEAT COUNT CURRENT / NEW 12/
Change Action	Action Taken: Cancel	License Status: Evaluation due	Service Start: 04/27/2014	Service End: 05/26/2014	Term: 1	Domain(s):		
Aperture Optics, Inc.								SEAT COUNT CURRENT / NEW 65/65
Change Action	Action Taken: Contact Zix	License Status: Evaluation due	Service Start: 05/22/2014	Service End: 06/21/2014	Term: 1	Domain(s):		

Example of Renewal Due customer with an action taken = Defer

AAA Elementary

Action: Defer

License Status: Renewal due	Hosted Gateway Term: 24	Hosted Gateway Service Start: 05/22/2012 End: 05/21/2014
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Domain(s):
aaaelementary.com

CURRENT SEAT COUNT 45

NOTE — Selecting defer will extend your decision for 1 month. Extensions will not be granted past 1 month.

Submit

Example of Renewal Overdue customer with an action taken = Contact Zix

AAA Medical Group

Action: Contact Zix

License Status: Renewal overdue	Hosted Gateway Term: 12	Hosted Gateway Service Start: 04/22/2013 End: 04/21/2014
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Domain(s):
None

CURRENT SEAT COUNT 30

Message for Zix *

This customer is out of the country but does intend to renew. I will authorize the billing next month when I obtain their signature.

Note: Contract does not allow renewal grace periods > 30 days. If special circumstances prevent customer from renewing at this time, select the Contact Zix option.

Submit

Example of Evaluation Overdue customer with an action taken = Cancel

Absolutely Wonderful

Action: Cancel

License Status:
 Evaluation overdue

Hosted Gateway Term: 1

Hosted Gateway Service Start: 03/16/2014 **End:** 04/15/2014

Domain(s):
absolutelywonderful.com

Cancel Date: *

Cancel Reason: *

Note: Contract does not allow trial periods > 60 days. If special circumstances prevent customer to be billed at this time, select the Contact Zix option.

Completion of Optional Items

Customers in a current status have no required actions. The only time to act upon current customers is when there is an add-on order or when there is a matter to discuss with Zix.

License Status	Options available for Current and NFR licenses
<p>CURRENT: Customer is paid in full for current service period.</p> <p>OR,</p> <p>Customer is paid in full for current service period but wants to purchase add-on seats.</p>	<p>No action required. However, current customers are eligible for add-on seats.</p> <p>Four options:</p> <ol style="list-style-type: none"> 1. Choose "Co-Terminus Add On" to add seats with the same service end date as the current service end date. The billing amount will be pro-rated to account for the shorter term length. 2. Choose "1 Year Add-On" to add seats for a full year service period that is NOT co-terminus with the service end date of the current customer. 3. Choose "3 Year Add-On" to add seats for a full year service period that is NOT co-terminus with the service end date of the current customer. 4. Choose "Contact Zix" to prompt a dialogue with Zix.
<p>NFR: These are the Not-for-Resale seats included in your enrollment into the MSP Program.</p>	<p>No action required. However, partners can add licensed seats.</p> <p>Two options:</p> <ol style="list-style-type: none"> 1. Choose "1 Year Add-On" to add seats for a one year service period 2. Choose "3 Year Add-On" to add seats for a three year service period

Add Ons

Here are samples of the 3 different add-on options available to you.

This is a Co-Terminus Add On. You supply the seats and start date; the application sets the new service end date to match the current service end date.

Anniversary Celebrations, LLC **Action: Co-Terminus Add On**

License Status: **Current** Hosted Gateway Term: 36 Hosted Gateway Service Start: 07/22/2013 End: 07/21/2016 ZixPort Term: 36 Zixport Service Start: 07/22/2013 End: 07/21/2016

Domain(s):
None

CURRENT SEAT COUNT **45**

[+ Add Seats](#)

Add New Seats *(Do not include current seats.)*

 [Reset](#)

Total Seats 55

Please Supply Add On Service Start Date: * Co-Terminus End Date: *

[Submit](#)

This is a 1 Year Add On. You supply the seats and service start date, the application calculates the end date.

Adventures in the Bahamas, Inc. **Action: 1 Year Add On**

License Status: **Current** Hosted Gateway Term: 12 Hosted Gateway Service Start: 02/27/2014 End: 02/26/2015

Domain(s):
adventuresinbahamas.com

CURRENT SEAT COUNT **25**

[+ Add Seats](#)

Add New Seats *(Do not include current seats.)*

 [Reset](#)

Total Seats 30

Please Supply Add On Service Start Date: * New Service End Date:

[Submit](#)

This is an example of a 3 Year Add On. You supply the seats and service start date, the application calculates the end date.

Acapulco Resorts, Inc. Action: 3 Year Add On

License Status: Current Hosted Gateway Term: 36 Hosted Gateway Service Start: 05/27/2013 End: 05/26/2016

Domain(s):
acapulcoresorts.com

CURRENT SEAT COUNT **25**

[+ Add Seats](#)

Add New Seats *(Do not include current seats.)*

Total Seats 40

Please Supply Add On Service Start Date: * New Service End Date:

 05/26/2017

Alignment with ZixPort Service Periods

If you have a customer who purchased ZixPort in addition to Hosted Gateway seats, we display the ZixPort service period next to the Hosted Gateway Service.

License Status: Renewal due	Hosted Gateway Term: 12	Hosted Gateway Service Start: 04/04/2013 End: 04/03/2014	ZixPort Term: 12	Zixport Service Start: 05/30/2014 End: 05/29/2015
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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.

Handling varies based on license status:

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

-- 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

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.			

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

-- Select One --
Co-terminate with ZixPort end date
1 Year
3 Years

Choose Term Length: *	New Service Start Date: *	New Service End Date: *
Co-terminate with ZixPort 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.		

In all cases, you will be reminded that you have a 4th option.... Contact Zix.

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.

Anniversary Celebrations, LLC Action: Contact Zix

License Status: **Current**

Hosted Gateway Term: 36 Hosted Gateway Service Start: 07/22/2013 End: 07/21/2016

ZixPort Term: 36 Zixport Service Start: 07/22/2013 End: 07/21/2016

Domain(s):
anniversarycelebrations.com

CURRENT SEAT COUNT 45

Message for Zix *

I want to co-terminate an add-on for 10 seats with the existing ZixPort and Hosted Gateway service end dates.

The example below 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.

Apple A Day Action: Bill

License Status: **Evaluation due**

Hosted Gateway Term: 1 Hosted Gateway Service Start: 05/27/2014 End: 06/26/2014

ZixPort Term: 36 Zixport Service Start: 05/05/2014 End: 05/04/2017

Domain(s):
appleaday.com

CURRENT SEAT COUNT 50

Add Seats (Do not include current seats.)


New Total Seats: 50

Choose Term Length: *	Service Start Date:	Service End Date:	Term:
<input type="button" value="Align with ZixPort term, sta"/> ▼	05/05/2014	05/04/2017	36

Note:
If desired term length option not available here, exit this page and select Contact Zix option instead.

Change Actions

After you take an action on your customer records, you can see the Action Taken. If you want to change the handling, select Change Action. Make corrections and hit the Submit button.



Advertising R US		
Change Action ▼	Action Taken: Bill	License Status: Renewal overdue
All Day Long, LLC		
Change Action ▼	Action Taken: Cancel	License Status: Evaluation due
Anniversary Celebrations, LLC		
Change Action ▼	Action Taken: Coterminus Add On	License Status: Current
Aperture Optics, Inc.		
Change Action ▼	Action Taken: Contact Zix	License Status: Evaluation due

Current / New Seat Count

The system keeps track of changes to Current / New Seat Count as you make your updates. The new total is displayed on the bottom of the current month's report.

Total Seats (Current/New): **387/427**

The report status changes to Complete after you make all required changes to your customers. The Submit to Zix button will not appear until the report status is Complete.

Monthly Reports » April 2014 (Complete)

Submit Report to Zix

Submit to Zix

Submit data to Zix?

Are you sure there are no other billing updates? Submitting this report to Zix will lock this month's report.

When you hit the submit button, your report status changes to Submitted. It is now locked; no further changes can be made to the report. Your Zix Reporting Contact will receive an email notifying them that you have submitted the report.

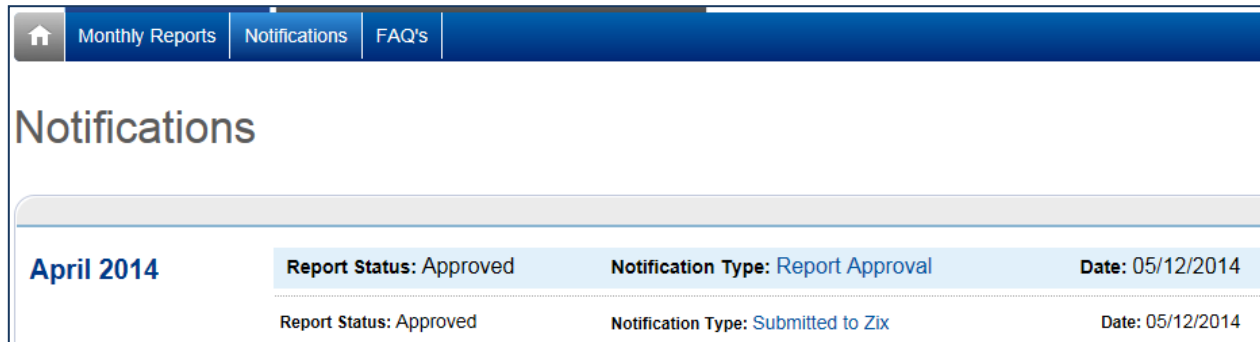
No Changes for Current Reporting Period

If you receive a report that contains no required billing actions, and you have no 'add-on' seats to purchase for your customers, you will be prompted to check the box: "Check this box to confirm you have no changes to this report." Selecting this action changes the report status from New to Completed. The Submit to Zix button appears. When you hit the submit button, your report status changes to Submitted.

Check this box to confirm you have no changes to this report. *

Approved Reports

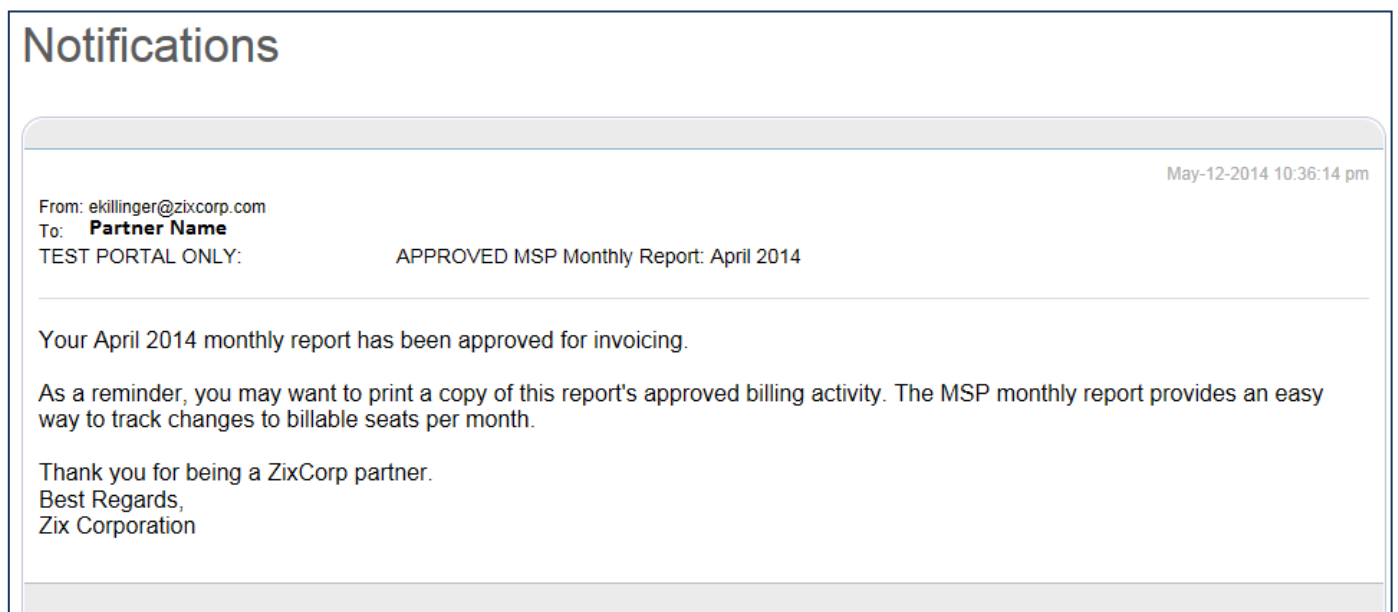
Zix reviews and approves submitted reports. After the report is approved, you will receive notification via email. You do not need to save this email because exact same email notice is filed under the Notifications tab in the portal.



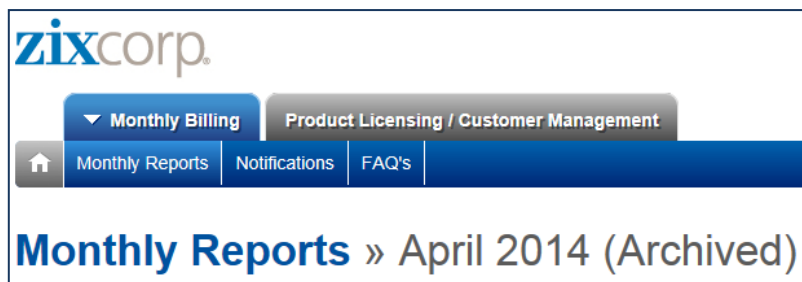
The screenshot shows the 'Notifications' tab selected in a navigation bar. Below the header, there is a table of notifications for April 2014.

Month	Report Status	Notification Type	Date
April 2014	Approved	Report Approval	05/12/2014
	Approved	Submitted to Zix	05/12/2014

The exact same content is stored in the portal.



Approved reports are archived reports. They are view-only. You can drill down on the customers within this report, but you cannot alter any actions already taken.



Incomplete Reports

A report remains “Incomplete” until all required billing actions have been taken. If the deadline for submission to Zix is missed, the report is locked. All changes are lost. The report becomes view-only. In these circumstances, Zix may contact you to resolve issues and facilitate timely invoice authorization.

Notifications from Zix

Partners receive notifications from Zix throughout the month. Navigate to the Notifications tab to see notification type, date and corresponding report status.

1. 1st Notice – Sent when Zix issues the current month’s report on or near the 5th business day
2. 2nd Notice – Reminder notice if Completed report not submitted to Zix on or near the 10th business day
3. Final Notice – Reminder notice if Completed report not submitted to Zix on or near the 15th business day

Notifications

Admiral MSP Partner April-22-2014 03:41:08 pm

From: @zixcorp.com

To: TEST PORTAL ONLY: INITIAL NOTICE MSP Monthly Report: April 2014

Your Monthly MSP Report is available for viewing at ZixCorp's Partner Licensing Portal at <https://portal.zixcorp.com/>. Please complete all required and optional billing actions and submit the report to Zix.

If no licenses were sold in the current month, please confirm that by submitting a completed report via the Partner Portal.

For unique invoicing situations or billing discrepancies, enter "Contact Zix" as the billing option. Feel free to contact your Finance representative with any questions. Their contact information is listed below.

Thank you for being a ZixCorp partner.
Best Regards,
Zix Corporation

Notifications

July 2013	Report Status: Complete	Notification Type: Submitted to Zix	Date: 08/23/2013
	Report Status: Complete	Notification Type: Submitted to Zix	Date: 08/23/2013
	Report Status: Complete	Notification Type: Contact Zix	Date: 08/23/2013
	Report Status: Complete	Notification Type: Contact Zix	Date: 08/23/2013
	Report Status: New	Notification Type: Final Notice	Date: 08/22/2013
	Report Status: New	Notification Type: Reminder Notice	Date: 08/22/2013
	Report Status: New	Notification Type: Initial Notice	Date: 08/22/2013

Report Print Capability

You are able to print an Excel version of your data after you hit the Submit button. We recommend you print your Submitted reports because this will show you the before and after seat count.



An example of printed report:

Report Month	Report Status	Customer Name	License Status	Action Needed	Action Taken	Before Seats	Seat Adjustment	Current Month Billable Seats	After Seats	
July 2013	Submitted	Company ABC	Evaluation due	Required - UPDATED	Bill	10	15	25	25	
July 2013	Submitted	Company CDE	Evaluation due	Required - UPDATED	Bill	50		50	50	
July 2013	Submitted	Company DEF	Evaluation due	Required - UPDATED	Defer Action	30			30	
July 2013	Submitted	Company XZY	Evaluation due	Required - UPDATED	Cancel	45	-45		0	
July 2013	Submitted	Company 123	Evaluation overdue	Required - UPDATED	Bill	10		10	10	
July 2013	Submitted	Company 345	Evaluation overdue	Required - UPDATED	Contact Zix	100			100	
July 2013	Submitted	Company 678	Renewal due	Required - UPDATED	Bill	20			20	
July 2013	Submitted	Bank One	Renewal due	Required - UPDATED	Bill	30	10	40	40	
July 2013	Submitted	Bank Two	Renewal overdue	Required - UPDATED	Bill	30	10	40	40	
July 2013	Submitted	Bank Three	Renewal overdue	Required - UPDATED	Bill	20		20	20	
July 2013	Submitted	Credit Union 1	Current	Optional		100			100	
July 2013	Submitted	Credit Union 2	Current	Optional - UPDATED	1 Year Add On	75	25		100	
July 2013	Submitted	Health Center C	Current	Optional - UPDATED	Coterminus Add On	20	10	10	30	
July 2013	Submitted	Law Office One	Current	Optional - UPDATED	3 Year Add On	75	10	10	85	
July 2013	Submitted	Credit Union 3	Current	Optional		40			40	
July 2013	Submitted	Health Center A	Current	Optional		100			100	
July 2013	Submitted	Health Center B	Current	Optional		25			25	
July 2013	Submitted	Accounting Firm	Current	Optional		50			50	
July 2013	Submitted	Insurance Broker	Current	Optional		20			20	
July 2013	Submitted	Law Office Two	Current	Optional		150			150	
July 2013	Submitted	Partner Name	NFR	Optional		15			15	
July 2013	Submitted					Evaluation Sub-Total	245	-30		130
July 2013	Submitted					Licensed Sub-Total	755	65	205	905

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

- **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
- **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 of 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

Customer Demographic and Contact Data

If you need to update demographic data or contact data for one of your customers, navigate to the Customer List. 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
Apple A Day	Detroit	Other	Hosted Gateway ZixPort	50	appleaday.com
Archway Communications	Thomasville	GA	Gateway ZixPort		acinc.com
ABC Bank Customer	Orlando	FL	Hosted Gateway ZixPort	50	abcbank.com
Australia Outfitters	Sydney	AL	Hosted Gateway	20	australiaoutfitters.com
Bank of USA	Camilla	GA	Hosted Gateway ZixPort	25	usabankofga.com
Admiral MSP Partner	Cairo	GA	Gateway ZixPort Gateway Server	15	msppartner.com

Your firm has a blue background. Select your own firm or one of your Hosted Gateway customer records to [edit customer information](#) or to add, change and delete contacts.

Customer Demographics [Back to Customer Listing](#)

Aardvark Consulting [edit customer information](#)

Address 2830 Logan Way Chicago, IL 67867	Domains aardvark.com; aardvark2.com
---	---

[Add New Contact](#)

Company ID	Company Name	Contact First Name	Contact Last Name	Contact Email	PLP Privileges	Contact Phone	Actions
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	

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

The screenshot shows a web form titled "Update Customer Information" with a "Back to Customer Detail" link in the top right. The form is divided into several sections: "Customer Information" with fields for "Customer's Company Name" (Aardvark Consulting), "Address" (2830 Logan Way), "Address Continued", "City" (Chicago), "State" (Illinois), "Zip/Postal Code" (67867), and "Country" (United States); "Your Customer ID" and "Products" (Hosted Gateway); and a "Note to Zix" text area. A "Submit" button is located at the bottom left.

You can add a new contact on this page.

The screenshot shows a web form titled "Add New Contact - Aardvark Consulting" with a "Back to Customer Detail" link in the top right. The form is titled "Contact Information" and includes fields for "Contact First Name", "Contact Last Name", "Contact Email", and "Contact Phone". There is also a "Note to Zix" text area. The form is designed for adding a new contact to the existing customer record.

You can update an existing contact on this page.

The screenshot shows a web form titled "Update Contact" with a "Back to Customer Detail" link in the top right. The form is titled "Contact Information" and includes fields for "Customer's Company Name" (Aardvark Consulting), "Contact First Name" (Captain), "Contact Last Name" (Kirk), "Contact Email" (kirk@startrek.com), and "Contact Phone" (342-222-2121). There is also a "Note to Zix" text area. The form is designed for updating an existing contact's information.

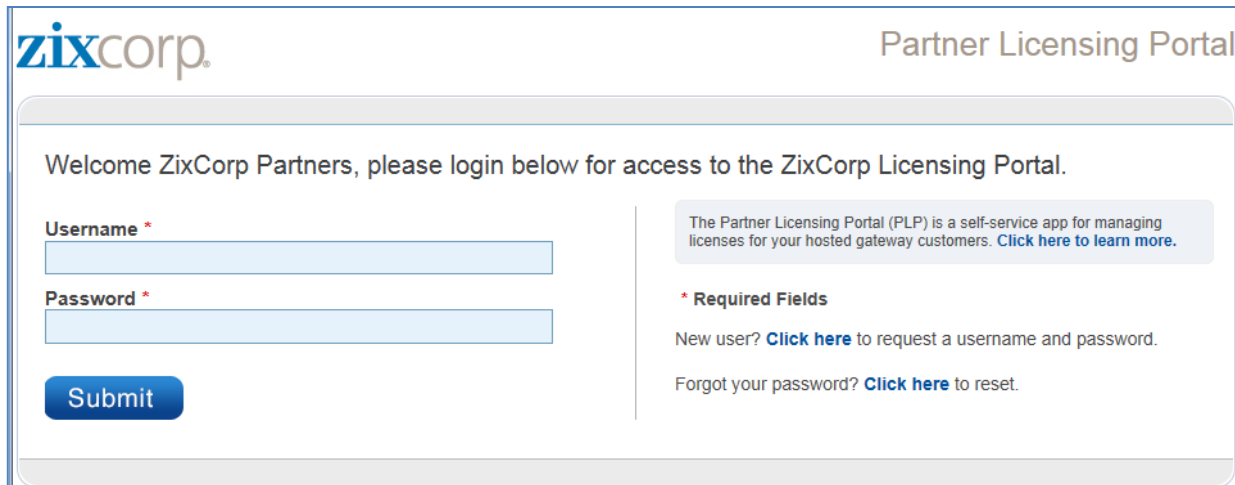
Make changes to any of the provided fields. You can choose to send a note to us about any changes or additions you wish to make to contact information. Hit the Submit button when you are done.

The changes will be sent in an email to your designated Zix Reporting Contact. Note: Domain name(s) cannot be changed via the customer edit process. Contact support@zixcorp.com for that action.

Product Licensing Requests

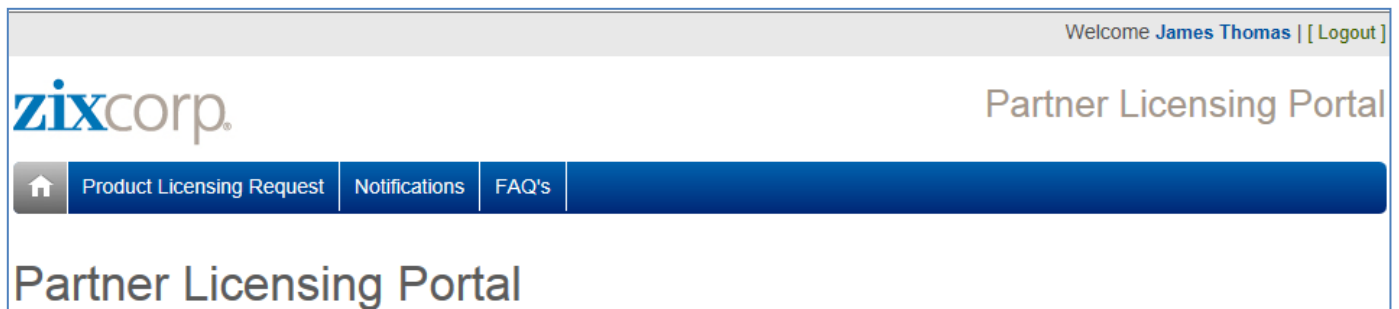
Technical team members submit key activation requests to the ZixCorp Support Team using PLP's Product Licensing Request feature. They supply customer demographic data and expected seat data at the same time they supply the domain name to Zix. The basic steps:

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.

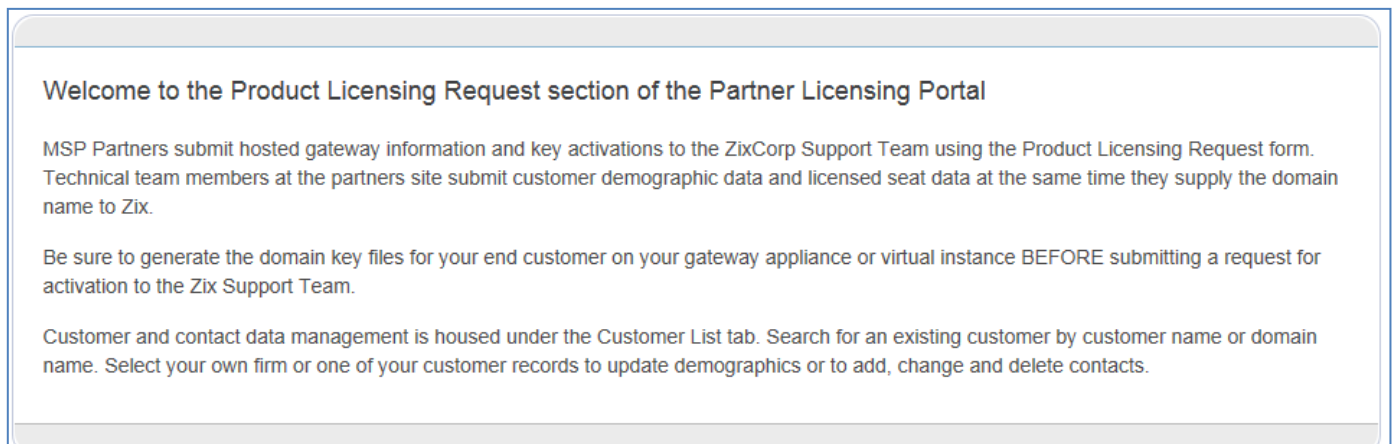


The screenshot shows the login page of the ZixCorp Partner Licensing Portal. The ZixCorp logo is in the top left, and the text "Partner Licensing Portal" is in the top right. A welcome message reads: "Welcome ZixCorp Partners, please login below for access to the ZixCorp Licensing Portal." Below this are two input fields: "Username *" and "Password *", each with a blue "Submit" button below it. To the right of the input fields, there is a light blue box containing the 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.



The screenshot shows the welcome page of the ZixCorp Partner Licensing Portal. The ZixCorp logo is in the top left, and the text "Partner Licensing Portal" is in the top right. A welcome message reads: "Welcome [James Thomas](#) | [[Logout](#)]". Below this is a navigation bar with a home icon and three tabs: "Product Licensing Request", "Notifications", and "FAQ's". Below the navigation bar, the text "Partner Licensing Portal" is displayed in a large font.



The screenshot shows the "Product Licensing Request" section of the ZixCorp Partner Licensing Portal. The text reads: "Welcome to the Product Licensing Request section of the Partner Licensing Portal". Below this, there is a paragraph: "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." Below this, there is another paragraph: "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." Below this, there is a final paragraph: "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.



Existing Customers

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

A screenshot of a web interface titled 'Current Customers'. At the top is a navigation bar with buttons for 'Home', 'Product Licensing Request', 'Notifications', 'FAQ's', and 'Customer List'. Below the navigation bar, the title 'Current Customers' is displayed on the left, and 'What's This?' and 'New Product Licensing Request' are on the right. A large grey rectangular area is present below the title. Below this area, the text 'Select from this list if you are requesting activation of:' is followed by a list of three items: '1. Domain keys for a new ZixPort customer', '2. Additional domain keys for a current hosted gateway customer', and '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.

Demographic data and existing domain(s) display.

1. Add up to 3 domains owned by that customer.
2. Elect "Activate" or "Activate and Suspend" from the picklist
3. Hit the Submit button.

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

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

1. Use this form to request up to 3 domain key activation(s) for an existing customer.
2. Submit only those domains owned by this particular customer.
3. 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) New Domain New Domain

aardvark3.com x

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

[Submit](#)

New Customers

If you are adding a domain for an entirely new customer, select the blue bar at the right labeled New Product Licensing Request.

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

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

This will open a blank form for you to fill in. Hit the Submit button when you are done.

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.

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"/>	<input type="text" value="Alabama"/>	<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?	
<input type="text" value="Activate"/>		

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

- [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: