Admin Guide – Virtual Private Server (VPS)

Apptix Hosting
Control Panel (CP)

Apptix Live Support: 866-428-0128
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FEEDBACK: If you note mistakes in this guide, or identify procedures that are incorrect, we encourage you to email your feedback to userguidefeedback@hostaccount.com. We continually strive to improve our customer support resources and your feedback is invaluable in assisting us with our goal to provide exceptional customer service.

Apptix Live Support: 866-428-0128
Email Support: ClientSupport@Hostaccount.com
Welcome to the Apptix Hosting Control Panel (CP) for VPS Administrators

The Apptix Hosting Control Panel (Hosting CP) is your gateway to all of the administrative functions that you can perform on your Apptix account, including billing information, adding domains to your account, ordering new services, and more.

How to Use this VPS Hosting CP Admin Guide

This VPS Hosting CP Admin Guide defines all of the menu options and features within the Control Panel that allow you to manage your VPS subscription service:

- **All Domains**: Manage the domains associated with all of your account subscriptions.
- **Hosting**: Access the control panel to manage your hosting services
- **My Account**: View, edit, and manage information related to your account.
- **Billing**: Order new Resources, Subscriptions, etc. Modify your billing contact information, etc..
- **Select Subscription**: Toggle between access to your various subscriptions with Apptix
- **Help & Support**: Obtain access to support resources
- **Logout**: End your Admin Control Panel session

Getting Started with VPS

For most customers who have ordered their hosted VPS service through the Apptix website shopping cart, the domain used for ordering the VPS service is already associated with your account. There is no need to use the **All Domains** menu to begin using your service. Typically you will utilize the **Hosting | VPS** menu options to do the following:

- **Introduction to your Virtual Private Server**: general information about your VPS service
- **Access Vituozzo** for advanced server management
- **Connecting to your VPS** using Remote Desktop and mapping local drives to your VPS
- **Backup VPS** to create backups and to restore data to your VPS

Additionally, there are other support resources that may be helpful to the management of your VPS service:

- **VPN Connection Guides** and other reference information

Other Menu Options & Subscriptions

Beyond the **Hosting | VPS** menu options used to manage the VPS functionality, the other menu options outlined in this guide allow you to manage other aspects of your account. Additionally, you may order other hosted services through the **Billing** option and manage those services by using the **Select Subscription** menu to select between multiple subscription services.
Documentation Overview

The primary audience for this Hosting Control Panel Administration Guide for VPS is account administrators who are responsible for setting up Exchange hosting services for users in your company. To better use this guide please review the following which will help you understand the information presented in this documentation.

Terminology

Prior to using this Hosting Control Panel Administration Guide for VPS please note the following information which will help you use this guide and understand some of the terminology associated with Apptix hosted accounts.

What is an Account

An account is a membership in the Apptix Hosting Control Panel (CP). An account keeps track of personal information, such as a user profile, billing history, purchases, etc. A number of users may be registered to manage an account. Each registered user may be granted different access rights within the Hosting CP.

What is a Subscription

A subscription is a package, or bundle, of hosting services provided by Apptix to the customer, with pre-set prices and terms of service including upgrades/downgrades availability, refunds policy, subscription periods, and a variety of other settings that depend on the type of services.

Services included in a service plan are typically a combination of features (Exchange mailboxes with spam prevention, etc.) along with a quantity of the service provided. Complementary services can be added optionally during the initial purchase or later, after the subscription is setup, as an add-on Resource.

What are Resources

A Resource is an itemized service that can be added, or subtracted, from the batch of services that define a Subscription.
### Documentation Typographical Conventions

The following formatting conventions are used throughout this guide.

<table>
<thead>
<tr>
<th>FORMATTING CONVENTION</th>
<th>TYPE OF INFORMATION</th>
<th>EXAMPLE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bold</strong></td>
<td>Used to identify screen names and input fields.</td>
<td>The <strong>Add New Domain</strong> screen is displayed which …</td>
</tr>
<tr>
<td>[<strong>Bold brackets</strong>]</td>
<td>Used to identify buttons and icons on a screen which are used to accept data input or navigate to a new screen.</td>
<td>Complete this screen and click the [<strong>Next &gt;&gt;</strong>] button.</td>
</tr>
<tr>
<td>**Bold Menu</td>
<td>Navigation Options**</td>
<td>Used to define a series of menu options selected in order. Each individual menu choice is separated by the</td>
</tr>
<tr>
<td><strong>Dark Blue Underline</strong></td>
<td>Used to identify a hyperlink on a screen.</td>
<td>Click on any of the [<strong>Select</strong> links under the [<strong>Select</strong> column in order to access that subscription’s main menu screen.</td>
</tr>
<tr>
<td><strong>Bold Italic Bright Blue</strong></td>
<td>Used to identify a hyperlink to a different section of the documentation guide. Click on these links to quickly access the referenced information.</td>
<td>To make new domain purchases utilize the [**Billing</td>
</tr>
</tbody>
</table>
Cancelling Service

You may cancel your hosting service(s) with Apptix at any time by cancelling your subscription through the Billing | Subscription Management menu option.

- Please see Billing | Subscription Management | Cancelling Subscriptions for detailed information on how to cancel your subscription(s) with Apptix

Cancellation Issues to Consider

Once you have cancelled your subscription(s) with Apptix you will no longer have access to our hosting environment. Therefore, BEFORE you process your cancellation request we suggest that you do the following:

1) Change your DNS Record settings accordingly so that VPS services/requests are no longer routing to the Apptix Hosting environment.
2) Backup any VPS Server data that is important for you to keep by downloading the data to a local personal computer.
Administrator Control Panel General Use

There are a few basics that you will encounter repeatedly when using the Apptix Hosting Control Panel for Administrators. This section quickly reviews how to log into the system, how to access your subscription services for those accounts with multiple subscriptions, and how to search for specific Users/Items within the Admin Control screens.

Logging into the System

1) Go to the Apptix Hosting CP Website at [https://cp.collaborationhost.net](https://cp.collaborationhost.net). You should see a log-in screen similar to the one below. Enter your administrative login (not your actual mailbox ID or email address) that you created when you signed up for the Apptix service. Type your username and password, and click the [Login] button.
   - Contact Apptix Support at 866-428-0128 if you have trouble logging into the Control Panel.

2) Once you have successfully logged in, most users will see the Hosting | Configuration & Administration screen, similar to the one below. From this screen, you can make changes to your Exchange mailboxes, SharePoint sites, or domains, etc.

Along the topmost blue menu ribbon you will find the main navigation to various sections of the Admin Control:

- **All Domains**: Manage the domains associated with all of your account subscriptions.
- **Hosting**: Access the control panel to manage your hosting services.
- **My Account**: View, edit, and manage information related to your account.
- **Billing**: Review past bills or change your credit card information, etc.
• **Select Subscription**: Toggle between access to your various subscriptions with Apptix
• **Help & Support**: Obtain access to support resources
• **Logout**: End your Admin Control Panel session

### Multiple Subscription Services

Optionally, for those accounts with multiple subscriptions, you may view and access your subscription services by selecting the **Select Subscription** menu item. From this screen you can toggle between subscriptions or set any of the subscriptions as your default view when first logging into and accessing the Control Panel:

- Click on any of the **Set as default** links under the **Default** column to identify the subscription to be displayed when first accessing the Apptix Hosting Control Panel.
  - The current “Default” is indicated in this column as a green Default icon without the **Set as default** link.
- Click on any of the **Select** links under the **Select** column in order to access that subscription’s main menu screen

### Navigation

You may access the main menu features of the Admin Control Panel to navigate in one of three ways:

1) Click on the main menu window icons/links to display a new screen of information.

2) Select the menu options from the left-side navigation panel. Clicking on a menu item expands the menu so that you may drill down in the menu structure.

3) Use the “breadcrumbs” along the top of the Admin Control screen to quickly access the menu structure.

**TIP**: Quick navigation: Follow/click the “breadcrumbs” at the top of each screen:

[Hosting > Configuration & Administration > SharePoint > Sites]
Access to Support Resources

A number of support resources to include documentation, video tutorials, etc., have been created to assist all customers with using their Apptix hosted services.

1) You may access these support resources from the Help & Support link on the main Hosting | Configuration & Administration page, or from the left side menu navigation: Hosting | Help & Support:

2) The Support page displays a list of links for each product. Clink on any link to access the support resource selected for your review.

   NOTE: New support resources are added periodically, so this page will change with updates over time. Please check back for new support resources periodically. Additionally, if you have a request for a support resource that you feel would be helpful to the use of our services, please send an email to userguidefeedback@hostaccount.com.
Window Search Options

Depending upon the size of your account, you may never need to utilize the Control Panel Search Options that are displayed at the topmost part of many windows that are displayed in the Control Panel. However, for larger customers that create a large number of mailboxes, Contacts, etc., the Search Options provide a manner for Admins to quickly locate the information they wish to work on without having to scroll through multiple pages.

The Search Options inputs will change depending upon the nature of the window being displayed, but in general at any time you may use one, or more, of the Search Option input fields to help you locate information within a large list of information currently displayed.

To perform an item search within any window containing the Search Option fields do the following:

1) Enter a valid entry of a search parameter in one, or more, of the Search input fields displayed. If you enter information in more than one Search input field, that acts as an “and” search whereby ALL parameters entered must be met in order to locate the item.

NOTE: In the bottom left corner of any window, there is an items per page: 25, 50, 100 toggle that allows you to click on any of the numbers listed to determine how many items are displayed on the page. The default is 25 items displayed per page.
2) Click on the [>] button to initiate the search. The item(s) found will be displayed so that you can manage the information located from the Search as needed.

- **NOTE:** On some screens this icon may be replaced with a Search link that performs the same function.

3) To clear the Search input fields, so that you may re-enter new Search parameters, click on the Reset Search hyperlink located under the Search: label. This will clear the information previously entered so that you may start a new Search.
Managing Domains

The Apptix Hosting Services CP has the ability to host and manage DNS services for your domain name(s). Whether you purchase a new domain through Apptix, transfer an existing domain for Apptix hosting, or simply point your DNS Records to Apptix, Apptix Hosting Services can be your single administrative Control Panel for DNS, as well as your hosted Exchange, SharePoint, Shared Website, and other services. If you have your domain registered and DNS records hosted outside of Apptix, you can still point specific records within your “external” domain DNS Records to Apptix if you wish to host your email or web hosting services with Apptix.

- Example for DNS Hosted Elsewhere:
  1) Point your MX records to Apptix for Exchange email hosting,
  2) Point your A Records to Apptix for Web Hosting

Each customer account must have at least one domain for Exchange, SharePoint, and Shared Website hosting to function. This domain, registered on the Internet, can be any standard .com, .net, .org, etc. that is hosted by Apptix or a third-party provider. Upon signup with Apptix, customers can purchase/register new domain names, or associate a domain name you already own with the Apptix services. The domain(s), that have been associated with a Apptix hosted service, are what enable Apptix to send and receive email or host SharePoint sites or Websites using your “mycompany.com” domain.

Access to Domain Information

There are two (2) locations within the Apptix Hosting CP where Admins can manage domain related features.

1) The main menu option All Domains, along the topmost blue menu ribbon, is the option to choose to access all domain-related features, to include adding new domains that are hosted with other DNS hosts, purchasing new domains, etc. The domains listed in this menu option represent ALL customer domains associated with your account across ALL subscriptions.

2) Under the Hosting | Domain Overview menu path, those domains that have been associated with the currently selected Apptix subscription can be accessed for review and management.
Hosting | Domain Overview

The Domain Administration feature of the Hosting options is utilized to manage domains that have been associated with the currently selected Apptix subscription for hosted services.

- **NOTE:** Utilize the All Domains function from the main menu for access to domain related functions that are not yet associated with a Apptix subscription, to include the purchase of new domains, etc.

1) To access existing domains associated with the currently selected Apptix subscription, log into the Control Panel, and access Hosting | Domain Overview from the left-side navigation or main menu links. You should see a screen similar to the following:

2) Click the Domain Administration link from left-side navigation or main menu links to see a list of domain names associated with your account in the Apptix Hosting Services Control Panel.

3) The domain name(s) associated with the currently selected subscription are listed in the Domain name column and the various subscriptions to which the domain(s) are linked are listed under the hosting columns depending upon the nature of the subscription(s) utilized by each domain(s).
   - Click on any domain name link under the Domain name column to review details associated with the corresponding domain.
   - In this example, the domain Apptixcustomer.com is associated with only a Microsoft Exchange Mail Hosting subscription.
   - **NOTE:** from this screen you can click the [Add New Subdomain] button to create a subdomain for any domains currently listed on the Domain Administration screen. See Creating a Subdomain.
in the All Domains section for additional instruction on creating a subdomain.

4) The **Summary** tab is displayed for the domain selected. From this screen you can review details associated with the domain by clicking on any of the links displayed. There are also additional tab(s) that allow you to access DNS information specific to the domain selected. Optionally if subscribed, access to other hosting service details of the domain are displayed on other tabs (for example, a **SharePoint** tab is displayed if the selected domain has a SharePoint subscription associated with it).

- See the **All Domains section** for detailed instruction on all other features related to domain management.
All Domains

When going through the Online Shopping Cart to order your Apptix service (Exchange, SharePoint, etc.) a domain name was associated with your Apptix service(s) purchased. Through the Apptix Admin Control Panel you can manage the domains associated with your Apptix accounts, as well as purchase additional domains to associate with any Apptix subscriptions of our hosted services, or perform other functions associated with domain name management.

- **NOTE:** You may also make domain purchases utilizing the **Billing | Domain Management | Register New** function from the main menu.

1) To access existing domains associated with any Apptix subscription—and to perform all other domain-related management functions—log into the Control Panel, and click the **All Domains** menu from the top-most blue menu bar.

2) The All Domains window is displayed with a listing of all domains currently associated with a Apptix subscription.
   - You may click on any domain listed under the **Domain name** column to access details associated with the domain.
   - Click on any of the buttons listed on this page to access features associated with management of domain names. Each feature is covered in the sections to follow.
Add existing domain registered elsewhere

You can associate multiple domains that you own to your Apptix hosted services. Apptix recommends that when you associate domains with Apptix hosted services that you point the DNS hosting to Apptix as well so that you can manage the DNS settings through this Admin Control.

3) From the All Domains screen above, click on the [Add existing domain registered elsewhere] button to assign another domain name that you own, but a domain that is being hosted by another DNS hosting company, to a Apptix hosting subscription.

   ![Add existing domain registered elsewhere screenshot]

   **IMPORTANT:** For Apptix to host your domain DNS records (Zone management ability checked), you must log into your DNS registrar account and point the DNS Records for the associated domain to:
   - ns0.collaborationhost.net
   - ns1.collaborationhost.net

4) The Add New Domain screen is displayed which allows you to assign a new domain to Apptix hosted service(s). Complete this screen and click the [Next >>] button.
   - **Domain:** Enter the domain to be associated with an Apptix Service
   - **Subscription:** Your various account subscriptions are available from this pull-down menu. Select the subscription to which the domain will be associated.
   - **Zone management ability:** Check this box if the DNS records with the associated domain are to be hosted with Apptix so that the domain settings can be managed via this Admin Control
     - If left unchecked you must change the appropriate DNS records that are required to insure that your Apptix service is functioning properly:
       - MX Record for Exchange email hosting
       - A Record for SharePoint services hosting
   - **Optional:** Web Hosting: Select from the dropdown if the domain is to be associated with a webhosting service:
     - None: No web hosting services
     - SharePoint: You wish to associate this domain with a SharePoint site
     - Web hosting: You wish to associate this domain with Web hosting services
   - **Optional:** Mail Hosting | Hosting | Microsoft Exchange: Select this drop-down option if you want to associate this domain with an Exchange email account.

(In this example the customer-owned domain my2ndcompany.net is being associated with Apptix hosted Exchange email service [a domain alias] and the DNS zone will be managed via this Apptix Admin Control)
5) The **Domain creation summary** message is displayed. The **Summary** section lists details associated with this domain, the Apptix service and the associated name server settings. Click the [Finish] button.

- Note that the Apptix name servers (ns0.collaborationhost.net, ns1.collaborationhost.net) are listed as the Name Servers since this was setup for “Zone Management”. You will need to POINT the associated domain’s Name Server settings to these settings so that the DNS Records can be managed via the Apptix Hosting CP. You do **NOT** need to transfer the domain, simply point the NS Records of the domain as indicated.

![Domain creation summary](image)

6) The **Domain Administration** screen is displayed with an updated list of Domains associated with your account. If the **In Sync** column is displaying a yellow No icon, you will not be able to utilize the domain for your various hosting services until it is updated to the In Sync status of Yes.

![Domain Administration](image)

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**NOTE:** The new domain status may require manual approval by Apptix to prevent customers from accidentally trying to register a domain they do not own, such as yahoo.com. Once this domain status has been updated to “Yes” in the **In Sync** column email addresses and SharePoint sites can begin using this domain.

- **You may only register domains that you own.** “Public” domains such as gmail.com, Comcast.net, aol.com, etc. may not be registered as a customer domain.

**NOTE2:** This section refers to pointing domains registered with a domain registrar to Apptix for domain record hosting. This does **NOT** transfer registration ownership of the domain to Apptix; only the hosting of the DNS records.

- **You may only register domains that you own.** “Public” domains such as gmail.com, Comcast.net, aol.com, etc. may not be registered as a customer domain.
Add New Subdomain

Subdomains add a “prefix” to an existing domain and are most often used for Web hosting purposes to create a “test area” for web development purposes (ex: development.mydomain.com) or to setup a SharePoint site (ex: intranet.mydomain.com, SharePoint.mydomain.com, etc.). You can utilize the Domain Management features to add a subdomain to any domain that you have associated with a Apptix hosted service.

1) To add a subdomain to a current domain associated with a Apptix service click the **Domain Administration** link from left-side navigation or main menu links to see a list of domain names associated with your account in the Apptix Hosting Services Control Panel. Click on the [Add New Subdomain] button.

2) The Add New Subdomain screen is displayed which allows you to assign a new subdomain to a current Apptix associated domain name. Complete this screen and click the [Next >>] button.

   - **DNS hosting | Subdomain name**: Enter the subdomain prefix title in the input field. From the drop-down menu select the domain name to which the subdomain name is to be assigned.
   - **Optional: Hosting | Hosting:/Subscription**: If this subdomain is to be used for Webhosting, or SharePoint services, make the choice from the drop-down menu. Additionally, if this option is chosen you need to assign the subdomain to an account subscription.
     - NOTE: In this example the subdomain is being used as the 100MB SharePoint Site included as part of the Exchange & SharePoint subscription.
   - **Optional: Mail Hosting | Exchange:/Subscription**: If this subdomain is to be used for an Exchange email account make the choice from the drop-down menu. Additionally, if this option is chosen you need to assign the subdomain to an account subscription.
3) **Optional:** In the event the subdomain is being used for either email or web hosting services the “Add new Subdomain wizard” allows you to setup the service for the subdomain in the subsequent steps. From the **Add new Subdomain** screen select the **Service User** to be the administrator of the service and click the [Next>>] button:

- **New Service User:** Select this option if the user desired to administer the service has yet to be created.
- **Existing Service User:** Select this option if the user desired to administer the service has been created. Select the desired administrator for this service from the drop-down menu.

4) Complete any additional screens needed to setup the service and click the [Next>>] button to proceed through each subsequent step. The **Domain creation summary** is displayed at the completion of the service setup wizard. Click the [Finish] button at the end of the setup wizard to complete setup of the service.

- **IMPORTANT:** If the following screen is displayed as part of the SharePoint setup wizard, make sure to select the **SHARED** option and not the Exclusive option. Click the [Next>>] button after selecting the Shared option to continue with the wizard.

- Note that the size of the SharePoint site associated with the subscription selected (100mb as part of the Exchange and SharePoint subscription) is displayed as part of the **Storage quota**.
5) The **All Domains** screen is updated to show the new subdomain added to your account.

- Note that any subdomains are listed under their parent domain and slightly indented to indicate that it is a subdomain. In this example, the SharePoint 3.0 Site service that is associated with the subdomain is also indicated under the **Web Hosting** column.
Register New Domain – Purchase New Domain

This option is similar to buying a new domain and is documented in detail in the Billing | Domain Management | Register New section of this documentation. A quick overview of this feature follows:

1) From the All Domains window click on the [Register New Domain] button. The Register New Domains window is displayed so that you may start the process of purchasing a domain.

2) In the Domain Information | Check Domain input field enter the domain name that you wish to purchase. Click the [Next>>] button to initiate an Internet search for the domain name entered.

3) The Admin Control searches the Internet and displays a list of all available domains that match, or resemble, the domain name entered on the Select Your Domain screen. If any of the domains listed represent a domain that you wish to purchase, click on the radio button in front of the desired domain name and click the [Next>>] button.
   - Optionally, if the domain search does not meet your criteria for purchasing a domain name, click the [Cancel] button to return to the Register New Domain: Check Domain Name screen so that you may begin a new search.

4) The Choose Subscription Period screen is displayed. Select the registration period for this new domain purchase from the options displayed and click the [Next>>] button.
   - Apptix recommends that all new domain purchases subscribe to the 2 Year Period option. This option provides our customers with a better value and is easier to manage than a single year subscription period.

5) The Select Hosting for Your Domain screen is displayed. This screen allows you to assign the domain being purchased to an Apptix hosted service. Select the desired subscription option displayed and click the [Next>>] button.

6) The Confirm Order screen is displayed so that you may review the domain purchase prior to finalizing the order. Click on the [Place Order] button to make the domain purchase. Your account will be billed accordingly and the domain is registered on your behalf and hosted by Apptix.

The proper domain records required to setup the subscription service associated with this domain are automatically created. You may update any of the DNS Records for this newly registered domain through the Hosting | Domain Management features of the Admin Control.

Transfer Domains

This option assists in transferring the registration of your domain from your current registrar to Apptix so that all future registration updates to the domain are managed through the Apptix Hosting Admin Control Panel. This feature is documented in detail in the Billing | Domain Management | Transfer Existing section of this documentation.
Managing DNS Records (MX, A, CNAME, etc.)

Apptix Hosting Services has the ability to host and manage DNS services for your domain name(s). Whether you purchase a new domain through Apptix or transfer an existing one, Apptix Hosting Services can be your single administrative Control for DNS, as well as your hosted Exchange, SharePoint, Web, and other services.

IMPORTANT: If you have your domain registered and DNS hosted outside of Apptix, you can still create DNS records at your DNS host account for your domain that route email (MX Records) and Web Hosting/SharePoint services (A Records) to your Apptix-hosted environment. If you are not certain of the proper DNS record settings required to take advantage of Apptix hosted services, please contact our support staff at 866-428-0128 or see item 7) below.

1) To manage your DNS settings for those domains, and sub-domains, associated with a Apptix hosted service, access the All Domains menu (or optionally Hosting | Domain Overview | Domain Administration from the left-side navigation or main menu links). All of the domains, and sub-domains, associated with your Apptix hosted services are listed so that you may access the DNS records associated with each.

2) Click the hyperlink of the domain name DNS records you wish to manage. The name of the domain is listed on the screen to identify the domain with which you are working as the example shown below. The default Summary tab displays the overall status of the domain and the Apptix services that are subscribed to the domain.

- DNS Hosting: This section indicates if the associated domain is hosted with Apptix (DNS Management = “Enabled”) in which case the DNS records of the domain can be managed via this Admin Control. The View Details link provides access to the domain name server records associated with this domain.

- Web Hosting: This section indicates if there are Apptix Web Hosting and/or SharePoint Site hosting services associated with this domain. Click on the Add Hosting/Remove Hosting link to change the status of web hosting services associated with this domain.
  - In this example no web services are associated with the “my2ndcompany.net” account at this time. Only Exchange email services are associated with this account (See below).

- Mail Hosting: This section indicates if there are Apptix Microsoft Exchange services associated with this domain. Click on the Add Hosting/Remove Hosting link to change the status of mail hosting services associated with this domain.

- Subdomains: This section indicates if there are subdomains associated with this domain and the type of services associated with the subdomain.
3) Click the **DNS** tab to view details of this domain from which you may add, or modify, the domain’s actual DNS records. Depending on whether your DNS is hosted with Apptix or hosted by a third-party, you will see screens similar to the following:
External Domain (DNS Records hosted with another provider): no DNS changes can be made via Apptix Hosting Services Admin Control for domains where the DNS records are hosted with another provider.

- If you need to make changes to the DNS records of such domains you will need to access your account with the DNS host provider and make those changes within that account.
- Optionally, click on the [Change DNS Hosting to Internal] button to assign this Apptix Hosting CP as the DNS Host of choice for this domain. You will need to assign the domain to a current Apptix subscription and update your DNS hosting records with the domain’s current registrar.
  - **NOTE:** This requires that you update your DNS Records with your current registrar to point to
    - Ns0.collaborationhost.net
    - Ns1.collaborationhost.net

Domain and DNS Records hosted at Apptix: You may make changes to current DNS records, and/or add new DNS Records to domains hosted by Apptix through this Admin Control.

4) Click the DNS Records sub-tab just below the DNS main tab. You can now click on any NS, MX, TXT, A, or CNAME record hyperlink to modify it from the Host column. To add a new DNS record for this domain click the [Add New DNS Record] button to add an additional entry.

- Note that the NS (Name Server) records cannot be changed as they represent the Apptix name servers
5) From the **Select DNS record type** drop-down menu select the type of DNS record to be added and then click on the **[Next>>]** button.
6) Depending upon the nature of the DNS record to be created, the appropriate screen is displayed so that you may enter the parameters needed to create a new DNS record. Enter the parameters needed to define this DNS record and click on the [Finish] button to complete the addition of this DNS record to the domain name.

7) Following are the various DNS record settings to utilize for Apptix hosted Exchange service:

- Apptix Hosting ALL DNS Records (check Zone management ability for the domain). At your domain registrar point the domain’s DNS records to:
  - Ns0.collaborationhost.net
  - Ns1.collaborationhost.net

For domains that are registered and hosted elsewhere (not Apptix) you can leave your DNS with your registrar, or DNS host and simply update the MX and CNAME records within your DNS Records as follows:

- MX Records routing for Exchange email only (DNS hosted elsewhere):
  - Server1.inboundmx.com  preference 10
  - Server2.inboundmx.com  preference 20

- CNAME record for Exchange email only (DNS hosted elsewhere):
  - Autodiscover.yourdomain.com that routes to autodiscoverredirect.collaborationhost.net
Apptix Hosted Virtual Private Server(s) – Additional Reference

Your Server Specifications

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<td>10 Gigabytes, does not include OS</td>
</tr>
<tr>
<td>IP ADDRESS</td>
<td>Dedicated</td>
</tr>
</tbody>
</table>

Additional VPS Management Resources

The sections that follow in this VPS Admin Guide cover the Apptix Hosting CP for VPS services as well as a quick overview of connecting to your VPS through a basic Remote Desktop session. There are more advanced topics related to VPS management that are provided as additional resources outside of this Admin Guide. Click on the TITLE of each VPS Management Resources listed below to view the Title selected.

<table>
<thead>
<tr>
<th>TITLE</th>
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<tr>
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</tbody>
</table>
Introduction to your Virtual Private Server(s)

If you have purchased one or more Virtual Servers (also called Virtuozzo, or VPS), you can manage these virtual servers directly within the Apptix Hosting Control Panel.

1. To access the management tools for your Virtual Private Server (VPS). Click on VPS from the left menu.
2. Then, click on the VPS Management hyperlink to access the VPS Management screen with the General tab displayed.

General Information about Your VPS

At a glance, all the most important summary information about your server is available on this screen: the host name, the IP address, the OS template used to build the server, and the active/inactive status of the server.

There are three major functions that can be performed from this screen:

- **Change Hostname**: Rename the host name to something more specific to your domain
- **Stop & Start**: Allows you to stop and start the server
- **Login to VZPP**: Go to the Virtuozzo Portal for advanced server management
Change Hostname

The hostname of the VPS server is set by default when the server is created and is displayed on the “General” information screen. There are two methods for changing the host name:

- Set domain name as hostname for VPS
- Set VPS hostname in domain

1) From the VPS Management screen | General tab, click on the [Change Hostname] button along the bottom of the screen. This starts a wizard for changing the hostname. Select the radio button next to your choice and click the [Next>>] button.

2) Enter the prefix for the New hostname and select the appropriate domain name, of those domains associated with your account, from the drop-down list. Click the [Next] button.
3) The next screen provides you with the appropriate DNS instructions for any hostname changes that you have just requested. For domains being hosted via the Apptix Hosting CP, those DNS record changes will be automatically updated.

4) A summary of the hostname DNS entries is displayed. Click the **Finish** button to accept these updates to the hostname.
   - If the selected domain name zone is not hosted via the Apptix Hosting CP a note at the top of the screen will indicate that you need to make the appropriate DNS changes with your external DNS hosting provider.
Start & Stop the Server

On occasion you may need to Stop and Start the server. By default the server is set to “Start”, as indicated by Status: Active displayed on the screen. Click the [Stop] button in the lower-right region of the “General” information screen.

- Click the [Stop] button: the status remains “Active” until the Stop operation is processed successfully
- Click the [Start] button: the status remains “Inactive” until the Start operation is processed successfully
  - If you are trying to STOP the VPS, a warning dialog is displayed to make sure that this is the action you want to take:
    - Click the [OK] button to continue with the command to STOP the VPS
    - Click on the [Cancel] button to abort the STOP command
Operating System Features

MORE ABOUT WINDOWS 2003 SERVER: For more information please refer to the "Windows 2003 Server Guide", the link is provided at the beginning of this document.

Operating System: Windows 2003 R2 Enterprise 64-bit

Included Services/Applications:

- Internet Information Server 6.0
- File Sharing Services

Available Services:

- Active Directory
- FTP
- POP/SMTP Email
- VPN Access
- DNS Server

Install & Uninstall Applications

Click on the Applications tab to manage the applications on your virtual server. There are two applications installed by default when the virtual server is built: the dot NET framework and the Plesk management toolset. The Parallels Plesk Control Panel is used to install and manage applications on a VPS.

MORE ON REMOTE INSTALL APPLICATIONS: See the section under Remote Desktop Connection to install applications from a local machine to the remote server.

View Applications

1) By default, the list of all installed applications included in the subscription is visible in the table list. To view all applications, click the [Show ALL Applications] button.
Install Applications

From the VPS Management screen | Application tab, click on the [Install] button to access additional default options that may be installed on your VPS.

If the Status is "Not Installed" and the checkbox is displayed in the 1st column you can install the application.

1) Select the checkbox next to the application that you want to install and click the [Submit] button.
2) The Status displays as “Installing” while the process is in progress. The Status displays as “Installed” when the process is completed successfully.

Uninstall Applications

There are two applications installed by default when the virtual server is built: the dot NET framework and the Plesk management toolset. If the Status is “Installed” and the checkbox is displayed in the 1st column you can uninstall the application.

1) Select the checkbox next to the application that you want to install and click the [Uninstall] button.
2) The Status displays as “Removing” while the process is in progress. The Status displays as “Uninstalled” when the process is completed successfully.
Manage IP Addresses

Click on the IP Addresses tab to manage the IP addresses on your virtual server. By default, all the available IP addresses are listed in the table.

Add IP Address(es)

From the VPS Management | IP Addresses tab, click on the [Add New IP Address] button to add a new IP Address to your VPS service. If the [Add New IP Address] button is dimmed out, your subscription does now allow for multiple IP Addresses for your VPS.

A warning dialog is displayed to make sure that this is the action you want to take:

- Click the [OK] button to finalize the addition of an IP Address
- Click on the [Cancel] button to abort the IP Addition command

An IP Address is added to your VPS Service and displayed on the VPS Management | IP Addresses screen
Delete IP Address(es)

Select the checkbox next to the IP address(es) that you want to remove and click the [Delete IP Address(es)] button.

A warning dialog is displayed to make sure that this is the action you want to take:

- Click the [OK] button to finalize the deletion of the selected IP Address(es)
- Click on the [Cancel] button to abort the IP Delete command
Virtuozzo for Advanced Server Management

Virtuozzo, version 3.5.1 (build: vzcp-3.5.1-24.6.swsoft), is the server-side system that creates multiple virtual machines. You can log into your Virtuozo/VPS management console to further view/change/modify your virtual server, including remote console into your system, shutdown/restart, etc. Click the Login to VZPP: https://000.000.00.000 link at the bottom of the General tab, as shown above. You will see a screen similar to the one on the following page.

MORE ABOUT VIRTUOZZO: For more information please refer to the “Virtuozzo User Guide”, the link is provided at the beginning of this document.

1) Click on the http address link displayed next to Login to VZPP:. A new window launches and logs you into the with Virtuozzo VPS Management portal. For more information please refer to the “Virtuozzo User Guide” (Link to this Guide provided here).
Connecting to your Virtual Private Server(s)

Connect using Remote Desktop – Link Local Devices & Drives

Using the Remote Desktop client for Windows or Mac is the best way to login to the server. To login and setup Remote Desktop you will need the IP address, user name, and password. Find them on the General tab of the VPS Management screen in Apptix Hosting Administrator Console.

1) Find the Remote Desktop Connection application on your local machine and click to launch the application. The Remote Desktop Connection authentication screen displays prompting for the Computer name.

2) Click the [Option>>] button.
Configuration Options

These configuration options are only available using the Remote Desktop Connection Windows or Mac client, not via web browser. There are 5 areas that can be configured for each remote desktop connection:

General: IP address, credentials, save connection configuration
Display: remote desktop size and color options
Local Resources: link local resources, devices, drives to the remote session
Programs: setup a start-up application when session begins
Experience: bandwidth adjustments, performance options
Advanced: security options

3) Enter the IP address into the Computer: input field.
4) Click the [Save] button to save the connection setting.

5) Click on the “Local Resources” tab to see the configuration for linking the remote server with the local machine.

6) To link the local devices and drives of the local machine to the remote session, click the [More...] button.
7) Expand the “Drives” tree and select all the checkboxes. Linking these resources allows you to install applications from the local machine’s disk drive onto the remote server.

![Remote Desktop Connection](image1.png)

8) Click the [OK] button. Go back to the “General” tab and make sure the IP address is correct, then click the [Connect] button.

![Remote Desktop Connection](image2.png)

The remote desktop connection credentials screen is displayed enter the user name and password. Make sure you select the “Remember my password” checkbox. Click the [OK] button.

![Remote Desktop Connection](image3.png)
9) A security question about the local computer displays, make sure all checkboxes are selected and click the [Yes] button.

The Remote Desktop screen is displayed on your local machine. The IP address is displayed in upper left corner of the window. You can see your remote desktop and browse all the applications as you would on your local machine.
Install an Application from Local Machine to Remote Server

Now that the resources, drives, and devices are linked, you can install an application from the disk drive on the local machine onto the remote server. You cannot do this using remote desktop via web browser.

1) Click on the [Start] button on the lower left corner of the Remote Desktop window and click on “My Computer”.

   ![Install an Application from Local Machine to Remote Server](image)
The My Computer browser opens and lists the available drives. There are hard disk drives on the server and also the “Other” connections that are detected on the local machine.

2) Insert the application installation disk into the local machine’s CD-ROM/DVD drive. Select the drive from the remote session list. In this example, the “D on K-BANKER-10345” is the local machine disk drive.

3) Double-click the Setup.exe executable and run the installation on the remote server.
Map a Local Drive(s) to a Drive(s) on your VPS Server

**IMPORTANT TIP:** Mapping drives uses port 445, which is locked down by most residential ISP's.

**Prepare the Server to Provide File Sharing Options**

1) Open up the Computer Management window by clicking on the Start button, right clicking on My Computer, and selecting Manage.
2) Browse to the Services option under Services and Applications, and ensure that both the Server and Workstation services are set to ‘Automatic’ startup type and are started.
Create Users to Access Folders

1) From Computer Management, right click on the Users folder under System Tools | Local Users and Groups, and select New User

![Computer Management window showing New User dialog]

2) Fill in the New User information, uncheck 'User must change password at next logon', and click Create, and then Close.

![New User dialog box with fields populated]

Apptix Live Support: 866-428-0128
Email Support: ClientSupport@Hostaccount.com
Prepare Folders to be Shared

1) Using My Computer, browse to the folder that will be mapped to, right click on it, and click 'Sharing and Security'. If you do not see 'Sharing and Security', ensure that the Server and Workstation services are started as discussed in the 'Prepare the Server to Provide File Sharing Options' portion of this guide.

2) Select the 'Share this folder' radio button, and click on the Permissions button.
3) Click the Add button.

4) Type in the name of a user who will access this folder, press the Check Name button. The users name should become underlined and updated to reflect the full username, and click OK.

5) From the top box, select the user that was just added, and then assign the appropriate permissions by checking Allow or Deny in the bottom boxes. For users to be able to add and delete items, they should Full Control Allowed. Click OK to all windows.
Map a Drive to Shared Folder on the VPS Server

1) Right click on My Computer and select Map Network Drive.

2) Select the drive letter you wish to map, and in the Folder text field, type two backslashes, followed by the IP Address of your VPS Server, followed by another backslash, and the name of the folder that is being mapped to. In this example, this is the information for the setup:
   - IP Address: 216.166.14.139
   - Folder Name: mappedfolder
   - Resulting in this folder path: \216.166.14.139\mappedfolder

3) Click Finish.
4) Enter the Username and Password of a user that has been provided Sharing permissions to this folder and click OK.
5) The folder should open and should now be successfully mapped.

Virtual Private Networks and Your VPS

MORE ABOUT VIRTUAL PRIVATE NETWORKS: For more information please refer to the “Virtual Private Networks”, the link is provided at the beginning of this document.

"VPN connections use the connectivity of the Internet plus a combination of tunneling and data encryption technologies, such as the Point-to-Point Tunneling Protocol (PPTP) and Layer Two Tunneling Protocol with Internet Protocol security (L2TP/IPSec), to connect remote clients and remote offices."

By default, VPN functionality is turned off with the VPS service. The administrator should follow the step-by-step instructions found at the link at the front of this guide to enabled VPN features and functionality.

IMPORTANT: Apptix does not provide technical support for virtual private network issues.
Backup and Restore Virtual Private Server(s)

To create backups, and then restore a backup to your VPS when needed, use the **VPS Backups** option.

1) Access the VPS Backups features from the Main screen **Hosting | VPS Backups** menu option or left-side menu navigation.

2) All previously completed backups are listed on the **VPS Backups** window. You may select any of the previously completed backups by clicking on their hyperlink under the **Backup name** column to view details associated with the backup and perform a restore from the selected backup if necessary. To create a new backup click on the **[Add New Backup]** button.

3) Define the parameters of the backup from the **Create new backup** screen and click the **[Next>>]** button to setup the backup.
In the **Backup name** field enter a name for the backup to help you identify the backup at a future date should you need to use the backup for a restore.

There are three types of backups defined by the **Backup type**: radio button options. Select one of these three backup types for the defined backup:

- **Full**: Backs up the entire VPS. Will take longer than Base and Incremental backups.
- **Base**: Creates the initial backup for those wishing to use an incremental backup method.
- **Incremental**: Will backup only files that have changed since the prior backup.

4) The screen updates to indicate that the backup parameters have been accepted and the backup is ready to be scheduled. Click the **[Finish]** button to accept the backup. Optionally, click the **[Cancel]** button at any time to abort this procedure.

5) The new backup is displayed in the list of backups along with the details of the backup. The **Status** column updates to a green **Ready** when the backup has been completed.
Restore Your VPS from Backup

If you have created backups of your VPS, they may be used to restore your VPS at any time through the VPS Backups feature.

1) Access the VPS Backups features from the Main screen Hosting | VPS Backups menu option or left-side menu navigation. A list of all previously completed VPS Backups is displayed in the Backup name column. Select any of the backups listed on this screen by clicking on the associated backup link to view details of the backup and utilize the backup to restore your VPS.

2) The details of the backup are displayed on this screen and the name of the backup is also the screen name. Click on the [Restore] button in order to initiate a restore of your VPS from this backup. Optionally, click the [Cancel] button to abort the restore.

3) A warning dialog is displayed to insure that you want to access your VPS and start the restore procedure. Click [OK] to begin the restore or [Cancel] to abort the restore.

4) A status notification is displayed to provide you with information about the VPS restore.
Support for your Virtual Private Server(s)

Support Policy

Included at no additional cost with your VPS account is our standard support to assure server and infrastructure availability. Optional fee based support services are also available.

Standard VPS Support Definition

Standard support covers systems and infrastructure that is exclusively managed by our support and operations staff and is outside of customer control. In addition, we will assist you in basic connectivity questions and including navigation to and logging into your VPS server and the VPS section features of your Apptix Hosting (AOD) Control Panel.

Optional VPS Support Services Definition (Fee Based)

Optional Support services are charged per incident or per quote basis for educational or administration requests. Per incident VPS support service incident credits may be purchased through the AOD control panel at our then current prices.

Per Incident Examples

- Your server becomes unavailable and is not due to hardware or network services exclusively under our control.
- You request assistance with a pre-installed application that you may have configured incorrectly.

Education and Administration Examples

- You request assistance with a script.
- System administration
- System or application instruction
- System Setup or configuration

Please be aware that changes made by our technicians are made on an as-is, no warranty basis, and are subject to our Terms of Service. Additional changes, administration or troubleshooting will be subject to additional support fees.

You retain control and responsibility for the management of the VPS system, server software and applications. Upgrades are at your option, responsibility and control.

A backup of your VPS should always be performed (by you) before attempting installations, updates or modifications. In the event of a failed or aborted change that results in damage to your VPS, a restoration from your backup can be performed at your discretion without incurring fees. Restoration without your own backup of your VPS is not guaranteed or implied and will incur fees if you request our assistance.

Support Process

Support requests may be submitted via telephone or email. Urgent system down issues should always be reported via telephone for quickest resolution. Email requests will generally be responded to in less than 24 hours. Please visit the support home page for telephone and email contact details.

Support requests must always be initiated by customer personnel who have systems access and the required knowledge to administer your VPS implementation.
Statistics & Analysis

To allow you to properly manage your account’s Apptix services, and the resources associated with those services, the Statistics & Analysis feature displays a table that details your use of all of your account resources. To view this table from the Control Panel click the Hosting | Statistics & Analysis icon/link from the left-side navigation or main menu links. A screen similar to the following is displayed:

Resource Usage

1) Log into the Control Panel, and access Hosting | Statistics & Analysis | Resource Usage from the left-side navigation or main menu links. The Resource Usage screen is displayed showing a list that details that status of each resource in your account. Review this table to help you manage your account resources.

- To add additional resources to your account, click on the Billing menu option to purchase additional resources as needed.
Managing Your Account (My Account)

The Apptix Hosting Services Control Panel enables you to control many aspects of your services, Users, and billing. Although most of the contact information for your customer account is gathered during the initial signup/purchase, changes can be made to the primary billing or technical contacts through the My Account section of the Control Panel.

Updating Account Contacts

1) Log into the Control Panel, and access the My Account option from the blue main menu bar. The following Account Data screen is displayed:

2) Click the Account Contacts link on the main menu, or from the left-side navigation bar. The primary Administrative Contact is displayed and you may click the [Edit] button to change the Billing, Technical, or Administrative contacts for your company. Edit each Contact as needed and click the [Submit] button.
Adding or Deleting Administrator Users

1) Log into the Control Panel, and access the **My Account** option from the blue main menu bar. Click **Users** from the left-side navigation or from the main menu. Accounts shown on this **Users** screen are not the same as Exchange or SharePoint accounts, but are technical administrators for your accounts/services hosted at Apptix. These Users—if given the role of “Account Administrator” —can add/change/delete end-user accounts in Exchange, SharePoint, etc. By default, the initial “administrator” for a customer account is based on the login ID used during the checkout process on initial signup of the Apptix service.

The list of Users for your account is listed on this Users screen.

- If a User defined at this level has left your company you can delete the User by clicking on the checkbox next to the User and then click the **Delete** button.

  **IMPORTANT NOTE**: If you have only one Account Administrator at a time in the system, you must create a new (second) admin account and assign “Account Administrator” role to them before deleting the first account within “Users.” This prevents you from deleting the only admin account you have, and prevents you from being blocked from managing your system.

2) To add a new User, click the **Add New User** button. This will start a “Create staff member wizard” that will display five (5) steps for setting up the new User. Step 1 of 5: Select a Resource(s) for this User and click on the **Next>>** button.

- The resource options displayed depend upon your Account Subscriptions.
3) Step 2 of 5: Enter the details for this User and click on the [Next>>] button.

4) Step 3 of 5: Select the nature of the subscriptions that this User can manage and click the [Next>>] button.
   - Note: if you select the topmost “Allow management of all Account’s Subscriptions” Step 4 is skipped and you are taken directly to Step 5 of 5.

5) Step 4 of 5: Place a checkbox next to the subscription(s) that this User is allowed to manage and click the [Next>>] button.
6) Step 5 of 5: The subscriptions assigned to this User are displayed. Click on the [Finish] button to accept the settings for the User and complete the setup of this new User.

**Note:** In the following screenshot the new User account has been added. In order for this new User to have sufficient permissions in the Control Panel to become an Administrator who can add/change/delete users, you need to assign the “Account Administrator” role. The easiest way to do this is to select the hyperlink of the new User and update the user permissions via the **Role** tab.
7) Click the User hyperlink under the Login Name column to select this User (TechAdmin in this example), then click the Roles tab to view the roles assigned to this User. Click the [Add Element] button to add permissions to this User’s role.

8) Check the box next to the Account Administrator role and then click the [Submit] button.

9) You should receive a confirmation that the role was successfully added to the account. This new User now has the Administrator role with the ability to manage your account/services hosted with Apptix.

- **IMPORTANT NOTE**: This procedure is primary to be used to setup Admin Users. Utilize the Service User and/or setup individual mailboxes, etc. to create your standard Users within your account.
Billing

The **Billing** menu is one of the main choices along the blue menu bar of the Apptix Hosting Services Control Panel. You may access the Billing functions when you need to manage any of the following:

- **Domain Management**: Manage domains to be associated with your Apptix hosted services
- **Subscription Management**: Manage the subscriptions (bundles of services) that are associated with your account.
- **Upgrade Wizard**: Manage the resources packaged as part of your subscription
- **My Financial Info**: Manage the billing information linked to your account
- **My Contact Info**: Manage the billing contact information responsible for your account.

When you first access the Billing interface, the following screen is displayed. A “quick summary” of your account information is posted on the right side of each subsection of this main menu screen. These quick summary sections also contain links to the sub-menus within each section. You may navigate the Billing interface by selecting icons/links from the main menu screen, or by clicking on the menu items in the left-side navigation panel.

- **PLEASE NOTE**: The dollar amounts associated with these examples are typically zero ($0.00) as the final billing amount because the examples in this documentation represent a “test account” that has been discounted to zero ($0.00). Therefore, the dollar amounts in this Billing documentation are not representative of true Apptix pricing. The prices each Admin encounters through their Apptix Hosting Control Panel Billing options will be representative of the types of services associated with your account.
Domain Management

The Domain Administration features of the Hosting interface are used to manage the actual DNS Records of customer domains that are associated with Apptix hosted services. However, if you want to have Apptix act as the DNS host of record for your domain(s), you can use the Billing | Domain Management features to purchase domains, transfer the hosting information to Apptix of existing domains registered elsewhere, and renew domains that have been registered through Apptix.

On the Domain Management subsection of the main Billing screen, a “quick summary” of your domain information is posted on the right side so that you may easily determine when you need to access the domain management menu to manage domains. To access the domain management features of the Administration Control Billing interface select Billing | Domain Management from the main menu or left-side navigation pane. A screen similar to the following is displayed.
Register New – Purchasing a Domain

The Register New feature allows you to purchase a new, previously unregistered domain to be used with an Apptix hosted service. By utilizing this feature, Apptix is acting on your behalf to purchase the domain and act as the primary DNS Host of the domain(s) registered through this function.

1) Log into the Control Panel, and access the Billing | Domain Management | Register New option from the main menu or left-side navigation menu. The following Register New Domain: Check Domain Name screen is displayed:

2) In the Domain Information | Check Domain input field enter the domain name that you wish to purchase. Click the [Next>>] button to initiate an Internet search for the domain name entered.

3) The Admin Control searches the Internet and displays a list of all available domains that match, or resemble, the domain name entered on the Select Your Domain screen. If any of the domains listed represent a domain that you wish to purchase, click on the radio button in front of the desired domain name and click the [Next>>] button.
   - Optionally, if the domain search does not meet your criteria for purchasing a domain name, click the [Cancel] button to return to the Register New Domain: Check Domain Name screen so that you may begin a new search.
4) The **Choose Subscription Period** screen is displayed. Select the registration period for this new domain purchase from the options displayed and click the [Next>>] button.
   - Apptix recommends that all new domain purchases subscribe to the 2 Year Period option. This option provides our customers with a better value and is easier to manage than a single year subscription period.

5) The **Select Hosting for Your Domain** screen is displayed. This screen allows you to assign the domain being purchased to an Apptix hosted service. Select the desired subscription option displayed and click the [Next>>] button.
6) The Confirm Order screen is displayed so that you may review the domain purchase prior to finalizing the order. Click on the [Place Order] button to make the domain purchase. Your account will be billed accordingly and the domain is registered on your behalf and hosted by Apptix.

- The proper domain records required to setup the subscription service associated with this domain are automatically created. You may update any of the DNS Records for this newly registered domain through the Hosting | Domain Management features of the Admin Control.
Transfer Existing

The **Transfer Existing** feature is used to move the registration information for a customer owned domain from its current registrar to Apptix. This is different from just pointing the DNS records of your existing domain to the Apptix Domain Name Servers (which may be managed via Hosting | Domain Administration | Add Existing Domain Registered Elsewhere) in that the domain registration itself is transferred to Apptix. This means that Apptix becomes the official registrar of any transferred domains. Subsequently, you will then update the registration for any transferred domains through the Billing | Domain Management features of this Admin Control.

- **NOTE:** By using this feature, Apptix also automatically becomes the DNS host and all DNS records for the domain(s) transferred may be managed through this Admin Control.

1) Log into the Control Panel, and access the Billing | Domain Management | Transfer Existing option from the main menu or left-side navigation menu. The following Transfer Existing Domain: Enter Domain Name screen is displayed.

2) You will need the “transfer key” from the current domain registrar in order to initiate the transfer of the domain registration from its current registrar to Apptix as your domain registrar. In the Original Domain Name field enter the domain that you wish to transfer. In the Transfer key field enter the transfer key provided by your current domain registrar. Click the [Next>>] button to initiate the transfer of the domain to Apptix.

   - If you have not already done so, you will need to communicate with your current domain’s registrar provider to obtain the Transfer key that frees the domain to be registered through Apptix. **Additionally, you will need to have the current registrar “unlock” the domain.** Click the [Cancel] button if you do not have the Transfer key.
   - **NOTE:** Newly created/registered domains cannot be transferred for sixty (60) days past the origination date of creating/registering the domain per ICANN rules.

3) A confirmation screen is displayed indicating that the transfer process has been initiated. As part of the transfer process, Apptix will send an email to the email address of the domain owner (whomever registered the original domain name, per the domain’s registration records). That registration transfer email will contain two (2) transaction codes. As soon as the domain owner/customer receives this email containing the transfer codes, they must contact Apptix customer service to verify the two transaction codes. This protects the domain owner from theft of their domain.

4) Once Apptix receives confirmation of the receipt of the domain transfer transaction codes, the transfer of the domain to Apptix will be completed, along with hosting of the DNS Records through the Apptix Hosting CP. If the customer never gets the transfer email, or fails to verify the transaction codes with Apptix customer service, the domain transfer process cannot be completed. It is therefore important to contact our customer support if you have any questions regarding the domain transfer process.

   - **NOTE:** It may take 24 to 48 hours for all new DNS settings to update and propagate throughout the Internet before these changes will take effect.
Renew

The Renew feature is used to quickly renew the subscription period of any customer domains registered through Apptix. Typically all subscriptions & domains are set to auto-renew and there is no need to utilize this feature. However, if needed, an Admin can utilize this feature for subscription renewals. On the Billing | Domain Management subsection of the main Bill menu screen an Expire Soon menu/link displays a number associated with any registered domains that are coming up for renewal. If this number is greater than zero (0) use this feature to renew the expiring domain(s).

1) Log into the Control Panel, and access the Billing | Domain Management | Renew option from the main menu or left-side navigation menu. A Renew Domain screen similar to the following is displayed.

![Renew Domain Screen](image)

2) Any domains set to expire are displayed. Click the radio button in front of any domain(s) that you wish to renew and click the [Renew] button.
   - Optionally, if you do not wish to renew any expiring domains at this time click the [Cancel] button to end this function and return to the main Billing screen.

![Choose Subscription Period Screen](image)

3) The Choose Subscription Period screen is displayed. Select the registration period for this domain renewal from the options displayed and click the [Renew] button.
   - Apptix recommends that all domain renewals subscribe to the 2 Year Period option.
   - Enter any promotion codes, for additional pricing discounts, in the Promotion Code column input.

4) The Confirm Order screen is displayed so that you may review the domain renewal details prior to finalizing the order. Click on the [Place Order] button to make the domain renewal request. Your account will be billed accordingly and the domain is renewed on your behalf and hosted by Apptix.
Subscription Management

The Subscription Management features are used to manage the service configuration and pricing that defines your subscription to Apptix hosted services.

On the Subscription Management subsection of the main Billing screen, a “quick summary” of your subscription information is posted on the right side so that you may easily determine when you need to access the subscription management menu to manage subscriptions associated with Apptix hosted services. To access the subscription management features of the Administration Control Billing interface select Billing | Subscription Management from the main menu or left-side navigation pane. A screen similar to the following is displayed.

- Click on the any of the links describing the subscriptions listed under the Plan column to view the subscription details.
- Click on the Manage Subscription link under the Go to column in order to edit the associated subscription
- Select any of the menu options from the left-side navigation pane to access each feature of the subscription management function.

Cancelling Service – Cancel Subscriptions

If you wish to cancel your hosted service with Apptix so that you are no longer billed for our services, you may do so by cancelling subscriptions via the Billing | Subscription Management options. Once the cancel subscription option has been submitted you will no longer be billed for the subscription services. Additionally, you and your Users will no longer have access to the Apptix infrastructure for the cancelled subscription(s).

1) Log into the Control Panel, and access the Billing | Subscription Management option from the main menu or left-side navigation menu. A screen similar to the Subscription Management screen above is displayed listing all of your subscriptions with Apptix.

2) Click on any of the hyperlinks for a listed subscription under the Plan column in order to access the details of the subscription selected.
   - In this example the Windows Website (Shared) - Advanced subscription is being cancelled.
   - Note that you can cancel one subscription without affecting your other hosting services/subscriptions.
3) On the Subscription Name screen click on the [Cancel Subscription] button to begin the process of cancelling the selected subscription and ending billing for this service.
   • NOTE: You may end this process without processing the cancellation of the subscription at any time by clicking on the [Cancel] button to terminate the current subscription cancellation procedure.

4) You must enter something in the Comment* input field and then click the [Cancel Subscription] button to finalize the cancellation of the selected subscription.
5) A confirmation message is displayed to verify the cancellation of the subscription service.
**Expire Soon**

The **Expire Soon** menu allows you to easily maintain your subscriptions to avoid lapses in your Apptix hosted services.

1) Log into the Control Panel, and access the **Billing | Subscription Management | Expire Soon** option from the main menu or left-side navigation menu.

2) Basic subscriptions associated with your account are displayed. Note the **Expiration Date** column to determine when the subscriptions are set to expire, which could affect your Apptix hosted service. Click on any of the listed subscriptions under the **Plan** column in order to update the subscription period.
   - **IMPORTANT NOTE:** Both monthly and annual subscriptions typically are automatically renewed and billed to the credit card on file for your account. The Expire Soon screen is important to monitor only if your credit card on file may be problematic for billing purposes.
   - **To stop billing for any subscription you should cancel your subscription.**

3) From the General tab, account admins can change out the **subscription period**, **switch plans** or change the automatic billing options (**Renew Automatically**). Additionally there are buttons to manage the other main features associated with Subscription Management that are located in other menu options of the Billing menu functions.
   - **NOTE:** We warn against turning OFF the AutoRenew option. Doing so may cause interruptions in your hosted services if payment is not properly processed.
Expired Subscriptions

If the Expired Subscription quick summary from the main Billing | Subscription Management subsection indicates that your account has subscriptions that have expired, you need to access this feature as soon as possible to update the expired subscriptions in order to maintain your Apptix hosted services.

1) Log into the Control Panel, and access the Billing | Subscription Management | Expired Subscriptions option from the main menu or left-side navigation menu. The screen similar to the following Expired Subscriptions screen is displayed:

- In this example there are no expired subscriptions that must be updated

2) If any subscriptions associated with your account have expired they are listed on this screen. To update the subscription click on the subscription name link to be taken to the Renew Subscription menu options.
Renew Subscription

If the **Expire Soon** quick summary from the main Billing | Subscription Management subsection indicates that your account has subscriptions that are soon to expire, your best option to insure that you maintain your Apptix hosted services is to access the Renew Subscription menu to avoid lapses in your Apptix hosted services.

1) Log into the Control Panel, and access the Billing | Subscription Management | Renew Subscription option from the main menu or left-side navigation menu. A screen similar to the following Renew Subscription screen is displayed:

![Renew Subscription Screen](image)

2) The subscriptions associated with your account are displayed. Click on the radio button in front of the desired subscription to be renewed and click the [Renew] button

   - Optionally, to end this function click the [Cancel] button to return to the Billing main screen.

3) The Choose Subscription Period screen is displayed. Select the monthly or yearly subscription period option and click the [Place Order] button.

4) A confirmation screen is displayed so that you may review the details of your subscription renewal.

   - **NOTE:** If your account subscriptions are configured with the default Auto-Renew option, then there will be no need to monitor this feature.
Buy New Subscription

At any time you may buy subscriptions that represent a grouping of Apptix Hosting services that you wish to associate with a customer owned domain.

1) Log into the Control Panel, and access the Billing | Subscription Management | Buy New Subscription option from the main menu or left-side navigation menu. This starts the "Buy New Subscription" wizard which displays the options required to buy a new Apptix subscription.

2) The Buy New Subscription: Choose Category of Service screen is displayed which lists the types of hosting services provided by Apptix. Click on the radio button in front of the desired subscription category to be purchased and click the [Choose Category] button.

   • Optionally, to end this function click the [Cancel] button to return to the Billing main screen.

3) The Buy New Subscription: Choose Service Plan screen is displayed. A complete listing of all of the subscription services associated with the previously selected category is displayed. Click on the radio button in front of the desired service plan to be purchased and click the [Choose Service Plan] button at the bottom left of this listing of service plans.
4) The **Buy New Subscription: Choose Subscription Period** screen is displayed. You may purchase subscriptions on a monthly or yearly basis. The yearly option represents a significant discount off of the monthly service pricing. Click on the radio button in front of the desired subscription period and click the [Choose Period] button.

5) *(Optional)* The **Provisioning parameters** screen is displayed so that you may associate a domain name to the subscription being purchased. This screen is displayed only if the subscription being ordered needs to be associated with a domain name. Entered a domain associated with your account and click the [Next>>] button.

6) The **Confirm Order** screen is displayed so that you may review the details of this subscription purchase prior to placing your order. Click the [Place Order] button to accept the “standard” subscription service and finalize this purchase. Your account is billed accordingly.

- Optionally you may modify the subscription parameters by adding additional resources to the subscription selected. Click on the [Order Additional Resources] button to modify the subscription selected which starts the **Upgrade Wizard** procedures.
Upgrade Wizard

The Upgrade Wizard features are used to modify your subscriptions with Apptix to meet your specific needs. There is no “quick summary” of information in the Upgrade Wizard subsection of the main Billing screen though the hyperlinks are present. To access the Upgrade Wizard options select Billing | Upgrade Wizard from the main menu or left-side navigation pane. The following screen is displayed which provides access to the main features of the Upgrade Wizard.

Buy Additional Resource

The Buy Additional Resource feature allows you to add resources to a subscription that is being utilized by a customer domain.

1) Log into the Control Panel, and access the Billing | Upgrade Wizard | Buy Additional Resource option from the main menu or left-side navigation menu. A screen similar to the following Upgrade Operation Buy Additional Resource screen is displayed:

2) A list of your subscriptions is displayed under the Plan column. You may click on the link describing the subscription plan to be upgraded in order to modify the resources associated with that subscription. A list of all of the possible resources that may be selected to define the subscription is displayed that corresponds with the type of subscription plan selected (i.e., the resources associated with an Exchange subscription are different than those associated with a SharePoint subscription).
3) The Status column identifies those resources currently associated with the subscription selected as “Installed” (green icon). Click the Upgrade link in the Click Here to Buy column in order to add resources to the selected subscription.
   - In this example the Blackberry resource is being added through this Upgrade Wizard.

4) A “Resource Details” screen (Resource Blackberry in this example) is displayed that allows you to determine the quantity to be purchased for the resource selected. Enter a quantity in the Place Upgrade Order for input field and click the [Next>>] button.
5) The **Confirm Order** screen is displayed so that you may review the details of this subscription update purchase prior to placing your order. Click the **[Place Order]** button to accept the upgrade of resources and finalize this purchase. Your account is billed accordingly.

- Optionally, click the **[Cancel]** button to terminate the Upgrade Wizard and your account will not be billed.
Change Subscription Plan

The **Buy Additional Resource** feature allows you to modify a subscription plan in order for the plan to better suit your needs. However, there may be times when you need to make a “wholesale” upgrade or downgrade of the overall subscription plan that you currently utilize. You may use the **Change Subscription Plan** feature to process an upgrade, or downgrade, of your subscription plan(s).

1) Log into the Control Panel, and access the **Billing | Upgrade Wizard | Change Subscription Plan** option from the main menu or left-side navigation menu. A screen similar to the following **Change Subscription Plan: Select Subscription** screen is displayed:

2) A list of your subscriptions is displayed under the **Plan** column. You may click on the link describing the subscription plan to be upgraded/downgraded in order to change subscription. A list of all of the variations of the subscription selected is displayed that corresponds with the category of subscription plan selected (i.e., if an Exchange subscription is being changed then only Exchange subscription plans are displayed in this step).
3) All of the different subscription plans associated with the subscription category selected are listed in the **Name** column. Click the radio button in front of the subscription plan to be selected as a change from your current subscription and then click the [Change Service Plan] button.

- In this example, the Admin is selecting an upgrade of the Exchange plan to move from 5 mailboxes to 10 mailboxes and is also increasing the storage allocation from 2GB per mailbox to 4GB per mailbox.

4) The **Select Subscription Period** screen is displayed. At the bottom of this screen you may select the subscription period. You may purchase subscriptions on a monthly or yearly basis. The yearly option represents a significant discount off of the monthly service pricing. Click on the radio button in front of the desired subscription period and click the [Select Period] button.

- Optionally, click the [Cancel] button to terminate the Upgrade Wizard and your subscription will remain unchanged and no charges will accrue to your account

5) At the top of this screen the **Switch Plan Option** section allows you to determine how this subscription change is to be billed. Click the radio button in front of the desired option to select how your account is to be prorated for the subscription change:

- **From the Start Date of Current Subscription**: The anniversary date of subscription renewal will be maintained (ex: 5th of the month, etc.). The billing for additional resources or changes to subscriptions will be prorated for the remaining time left for the current subscription period so that the net renewal date anniversary will charge for all services for the forthcoming period.

- **From the Date of Upgrade**: The existing anniversary date of the subscription renewal (ex: 5th of the month) will not be used. The subscription with all new added/edited resources and pricing will be charged now for the next month, or year depending upon the term chosen, as the date this update is entered. Any unused subscription fees paid for the current subscription will be prorated and credited to the new order.

6) There is also a **Promotion** section that allows you to enter any promotion code that you may have been provided by the Apptix sales team, or any Internet promotion, etc., that will provide a price discount on the service ordered.

- Enter a valid promotion code in the input field displayed.
My Financial Info

The My Financial Info features are used to update, or modify, your billing information so that your account remains in good standing. On the My Financial subsection of the main Billing screen, a “quick summary” of your current account Balance and Open Orders is posted on the right side so that you may easily determine the status of your account. To access the My Financial Info options select Billing | My Financial Info from the main menu or left-side navigation pane. The following screen is displayed which provides access to your account information.

On the My Financial Info screen the Balance Information section displays the current Balance of your account and the last time billing on your account was updated is displayed in the Balance Last Update Time field. If needed, you may click the [New Payment] button to process a payment on your account.

Invoice History

The Invoice History feature displays an itemized list of your past billing cycles. You may click on any of the invoice links to display the detail associated with each invoice.

Open Orders

The Open Orders feature displays an itemized list of all open orders associated with your account. You may click on any of the open order links to display the detail associated with open order.
Payment Methods

The Payment Methods feature allows you to define the details associated with payment methods used to manage your account.

1) Log into the Control Panel, and access the Billing | My Financial Info | Payment Methods option from the main menu or left-side navigation menu. A screen similar to the following Payments Methods screen is displayed:

2) You may click on the hyperlink of your current payment method(s) listed under the Type column to view details of the payment method selected. Optionally, you may add either "credit card" or "bank account" details to the list of available payment methods used to manage your account. To add a new credit card click the [Add New Credit Card] icon. A screen similar to the following is displayed:

3) Enter information as needed to complete each field and click the [Save] button in order to add this new credit card information to your payment method options.
   - Those input fields followed by a magnifying glass icon represent a drop-down menu option. Click on the search icon to access the options for that input field.
• Optionally, you may click the [Cancel] button to end this process without making any changes and return to the Billing main menu.

4) To add new bank account information, from the Payment Methods screen click the [Add New Bank Account] icon. A screen similar to the following is displayed.

   • **IMPORTANT NOTE:** Typically Apptix customers are only provided with the credit card payment option. Bank Account payment options must be a pre-approved through our billing/accounting department. Please contact our billing department at 866-428-0128 to discuss billing options for your account.

5) Enter information as needed to complete each field and click the [Save] button in order to add this new bank account information to your payment method options.
   - Those input fields followed by a magnifying glass icon represent a drop-down menu option. Click on the search icon to access the options for that input field.
   - Optionally, you may click the [Cancel] button to end this process without making any changes and return to the Billing main menu.
My Contact Info

The My Contact Info features are used to modify the user information of those in your company who are authorized to manage the billing aspects of your account. There is no “quick summary” of information in the My Contact Info subsection of the main Billing screen, but there are Update links that allow you to quickly access this information. To access the My Contact Info options select Billing | My Contact Info from the main menu or left-side navigation pane. The Account Info screen is displayed as the default for this option.

Account Info

The Account Info feature allows you to update basic information associated with your account that includes company and administrative contact information.

1) Log into the Control Panel, and access the Billing | My Contact Info | Account Info option from the main menu or left-side navigation menu. A screen similar to the following Account Info screen is displayed:

![Account Info Screen]

2) Click on the [Edit] button, at the bottom of the screen, to gain access to change the information displayed. Edit as needed to update your account information and then click the [Save] button.
**Personal Info**

The **Personal Info** feature allows you to edit the information for the person who is the administrative contact for billing purposes.

1) Log into the Control Panel, and access the **Billing | My Contact Info | Personal Info** option from the main menu or left-side navigation menu. A screen similar to the following **Personal Info** screen is displayed:

![Personal Info Screen]

2) Click on the **[Edit]** button to gain access to change the information displayed. Edit as needed to update the information associated with the billing contact for your account.

3) You may also change the password for the billing contact from this screen. Click on the **[Change Password]** button.

- **NOTE:** The password associated with feature is the password for the User to access the Apptix Hosting Control Panel.
Users

Users are not mailboxes. Instead a User is a person that has been provided with rights to manage your account through the Admin Control Panel. Though you can manage Users from this Billing interface, the procedures are the same as adding Users and assigning a Role for each User as described in the My Account section.

- Please see My Account | Adding or Deleting Administrator Users for detailed instruction for creating and defining Users and their Roles

Notification Methods

The Notification Methods feature allows you to set the parameters to define how you are to be automatically notified when trigger events are reached on your account.

1) To change the notification methods settings, log into the Control Panel, and access the Billing | My Contact Info | Navigation Methods option from the main menu or left-side navigation menu. A screen similar to the following How to notify me screen is displayed:

   ![How to notify me screen]

2) All of the various notification events are defined under the Types of Messages column. You may click on any of these notification message hyperlinks to view, and edit, the details of the notification method.

3) You may toggle “On” (Send – green icon) or “Off (Do Not Send—yellow icon) the type of notification message to be sent by clicking on the links under the Sent HTML, Sent Text, or Send PDF columns. Toggle these settings On/Off to define the type of notification message to be sent for each of the itemized notification methods listed and click on the [Save] button to change the state of the Notification Method.