Exchange 2013 & Related Services

Admin Guide

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Contents

Introduction .................................................................................................................................................. 3
   Get Started with Exchange........................................................................................................................ 3
   Other Menu Options & Subscriptions....................................................................................................... 3
Terminology .................................................................................................................................................. 3
Administrator Control Panel General Use ................................................................................................. 4
   Log into the System................................................................................................................................... 4
   Multiple Subscription Services.................................................................................................................. 5
Navigation ................................................................................................................................................. 6
   Access to Support Resources ..................................................................................................................... 6
   Window Search Options ........................................................................................................................... 6
Manage Domains .......................................................................................................................................... 8
   Access to Domain Information................................................................................................................... 8
      Hosted Domains .................................................................................................................................... 8
      Add Existing Domain Registered Elsewhere ......................................................................................... 9
      Add New Subdomain ........................................................................................................................... 10
      Register New Domain — Purchase New Domain ................................................................................. 13
      Transfer Existing Domain.................................................................................................................. 15
      Renew.................................................................................................................................................. 17
   Manage DNS Records (MX, A, CNAME, etc.) .......................................................................................... 18
Exchange ..................................................................................................................................................... 22
   Add Mailboxes to Your Exchange Account ............................................................................................. 22
      Import Mailbox Information ................................................................................................................ 25
   Add Resource Mailboxes to Your Exchange Account ............................................................................. 26
   Delete Mailboxes from Your Exchange Account..................................................................................... 28
   Configure Email Alias(es) — Additional Email Addresses for a Mailbox............................................. 29
   Configure Email Forwarding.................................................................................................................... 32
   Manage Mailbox Limits........................................................................................................................... 33
   Add a Contact to Exchange...................................................................................................................... 35
   Create Distribution Lists........................................................................................................................ 37
   Add a Mailbox to a Distribution List....................................................................................................... 39
   Mailbox Permissions............................................................................................................................... 41
   Company Disclaimers............................................................................................................................... 43
   Public Folders.......................................................................................................................................... 46
**Add Top Level Public Folders** .............................................................. 46
**Email Enable Public Folders** ............................................................. 47
**Create Sub-folders of Top-Level Public Folders** .............................. 48
**Storage Usage Report** ................................................................. 50

**Configure Wireless Services** ............................................................ 51

**Configure BlackBerry Service** ....................................................... 51

**Reset BlackBerry Devices** ............................................................ 54

**“Wipe” BlackBerry Devices** .......................................................... 54

**Configure ActiveSync** ................................................................. 56

**Instructions for setting up ActiveSync for Windows Mobile, iPhone, and Android devices** 59

**Service Users** ................................................................................. 61

**Add Service Users** .......................................................................... 62

**Change/Edit Login of a Service User** ........................................... 63

**Modify Current Service Users** .................................................... 64

**All Resource Usage** ......................................................................... 66

**Manage Your Account** ..................................................................... 67

**Update Account Contacts** .............................................................. 67

**Add or Delete Administrator Users** ............................................. 68

**Manage Notifications** ................................................................... 70

**Subscription Management** .......................................................... 71

**Cancel Subscription** ...................................................................... 72

**Expired Subscriptions** ................................................................. 74

**Renew Subscription** ...................................................................... 74

**Buy New Subscription** ................................................................. 76

**Buy Additional Resources** ............................................................. 78

**Financial Documents** ..................................................................... 81

**Unpaid Orders & Invoices** .............................................................. 81

**Open & Pending Orders** ................................................................. 81

**Invoices & Payments History** ....................................................... 82

**Orders History** .............................................................................. 82

**Payment Methods** ......................................................................... 82

**Add a Credit Card** ........................................................................... 82
Introduction
The Hosting Control Panel (Hosting CP) is your gateway to all of the administrative functions that you can perform on your hosted services account, including account information, adding domains to your account, ordering new services (such as additional mailboxes or storage), creating and editing mailboxes, adding mailbox aliases, creating distribution lists, adding external contacts to your company directory, and more.

Get Started with Exchange
For most customers who have ordered their hosted Exchange service through a website shopping cart, the domain used for ordering the Exchange service is already associated with your account. Typically, you will utilize the Exchange menu options to do the following:

- **Add mailbox(es)** to your Exchange account
- **Configure email aliases** for Exchange mailboxes
- **Create Contacts** to be displayed as part of your account Global Address List (contacts are email addresses that route outside of your Exchange account)
- **Define Distribution Lists** (email addresses that route to one (or more) recipient, which can be any combination of mailboxes or contacts)
- **Setup your Public Folder** structure

Other Menu Options & Subscriptions
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 Account option and manage those services by using the Subscription menu to select between multiple subscription services.

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

**What is an Account?**
An account is a membership in the 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 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 (depending on the types of services to which you are subscribed).

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 during the initial purchase, or later, as an add-on resource, after the subscription has been setup.

**What is a Resource?**
A resource is an itemized service that can be added or subtracted from the batch of services that define a subscription.
Administrator Control Panel General Use

There are a few basics that you will encounter repeatedly when using the 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.

Log into the System

1) Go to the Hosting CP Website.
   You should see a log-in screen similar to the one below.

   Type your username and password (not your actual mailbox ID or email address), which you created when you signed up for the service, and click the [Login] button.

   **NOTE:** Stronger passwords are now required. Old passwords are not affected. The new requirements are enforced when you create or change a password. New requirements include the following:

   - Use at least nine (9) characters in your password.
   - Use at least three (3) different character types – upper-case letters, lower-case letters, and numerals/special characters.
   - When calculating the number of character types: upper-case letters used as the first character and digits used as the last character of a password are not counted. (So, don’t use an uppercase letter to start the password; don’t use a number to end the password.)

   Contact Support if you have trouble logging into the Control Panel.

2) Once you have successfully logged in, most users will see the main dashboard, similar to the one below. From this screen, you can make changes to your Exchange mailboxes, domains, etc.
Along the topmost menu bar you will find the main navigation to various sections of the Admin Control Panel:

- **Home**: The main dashboard of the Control Panel.
- **Users**: Manage users of your hosting services.
- **Exchange/SharePoint**: Manage the mailboxes, contacts, distribution lists, and more associated with your Exchange subscription; manage users, admins, domains, and sites for your SharePoint subscription.
- **More Services**: Manage special features of your account, if applicable, such as Boundary Defense.
- **Account**: View, edit, and manage information related to your account.
- **Help & Support**: Access support resources.

**Multiple Subscription Services**

For accounts with multiple subscriptions, you may view and access your subscription services by selecting the **Subscription** drop-down list at the top of the screen.

From this list you can toggle between subscriptions or set any of the subscriptions as your default view when first logging into and accessing the Control Panel.
Navigation

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

1) Click the main dashboard shortcut links to access the most commonly used Control Panel options. *Examples: Add New Mailbox, Change Password.*

2) Select the menu options from the menu bar located across the top of the dashboard. Clicking a menu item accesses that particular item’s dashboard screen, from which you can then access options associated with managing the various functions of the Control Panel. *Examples: from the Users dashboard you can access Add New Service User and Change Domain; from the Exchange dashboard you can access Import Mailboxes and Add New Distribution List.*

Access to Support Resources

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

1) You may access these support resources from the Help & Support tab of the menu bar of the main dashboard:

2) The Help & Support screen displays Administrator Support and End-User Support access. Select a Support category.

3) Click any link to access a support resource.

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 for input fields displayed. If you enter information in more than one 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 right corner of any window, there is an **Items per page**: 25, 50, 100 toggle, which allows you to click any of the numbers listed to determine how many items are displayed on the page. The default is 25 items displayed per page. (The value that is *not* underlined is the current selection.)

2) Click the **[Search]** button to initiate the search. The item(s) found display so that you can manage the information located from the search as needed.

3) To clear the **Search for** input fields, so that you may re-enter new search parameters, click the **[Reset Search]** button. This will clear the information previously entered so that you may start a new search.
Manage Domains
The Hosting Services CP has the ability to host and manage DNS services for your domain name(s). Whether you purchase a new domain through your hosted services provider, transfer an existing domain for hosting, or simply point your DNS Records to your hosted services provider, 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 your hosted services provider, you can still point specific records within your “external” domain DNS Records to your hosted services provider if you wish to host your email or Web hosting services.

Example for DNS Hosted Elsewhere:

1) Point your MX records to your hosted services provider for Exchange email hosting
2) Point your A records to your hosted services provider 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., either hosted by your hosted services provider or a third-party provider. Upon signup with your hosted services provider, customers can purchase/register new domain names, or associate a domain name you already own with the services. The domain(s), that have been associated with a hosted service, are what enable your hosted services provider to send and receive email or host SharePoint sites or Websites using your “mycompany.com” domain.

Access to Domain Information
All domain-related features, such as adding new domains that are hosted with other DNS hosts, purchasing new domains, and more are available by selecting Registered Domains or Hosted Domains from the Domains section of the main dashboard.

Hosted Domains
The Hosted Domains feature is utilized to manage domains that have been associated with the currently selected subscription for hosted services.

1) To access existing domains associated with the currently selected subscription, log into the Control Panel and access Hosted Domains from the Domains section of the main dashboard. The Hosted Domains screen displays.

![Hosted Domains Screen](image)

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).
2) Click any domain name link under the **Domain Name** column to review details associated with the corresponding domain.

**NOTE:** from this screen you can click the [Add New Subdomain] button to create a subdomain for any domains currently listed. See *Creating a Subdomain* for additional instruction on creating a subdomain.

3) The **Summary** tab displays for the domain selected. 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 displays if the selected domain has a SharePoint subscription associated with it, like in the graphic below).

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**Add Existing Domain Registered Elsewhere**

You can associate multiple domains that you own to your hosted services.

1) From the **Hosted Domains** screen, click the [Add Existing Domain Registered Elsewhere] button to assign another domain name that you own, but that domain is registered by another domain provider or registrar hosting company, to a hosting subscription.

The **Add New Domain** screen displays, which allows you to assign a new domain to hosted service(s).
2) Complete this screen and click the [Next] button.
   - **Domain:** Enter the domain to be associated with a service.
   - **Zone management ability:** Check this box if the DNS records with the associated domain are to be hosted with your provider so that the domain settings can be managed via this Admin Control.
     o If left unchecked you must change the appropriate DNS records that are required to ensure that your service is functioning properly:
       ▪ MX Record for Exchange email hosting
       ▪ A Record for SharePoint services hosting

   The **Domain creation summary** message displays.

3) The **Summary** section lists details associated with this domain, the service and the associated name server settings. Click the [Finish] button.

   - Note that the name servers 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 Hosting CP. You do NOT need to transfer the domain; simply point to the NS Records of the domain, as indicated.

4) The **Domain Administration** screen displays an updated list of domains associated with your account. If the **In Sync** column is displaying a ☒ 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.

   **NOTE:** The new domain status may require manual approval by your provider 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.

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

   - **You may only register domains that you own.** “Public” domains (i.e., gmail.com, Comcast.net, aol.com) 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 (e.g., development.mydomain.com) or to setup a SharePoint site (e.g., 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 hosted service.

1) To add a subdomain to a current domain associated with a service, click the **Hosted Domains** shortcut in the **Domains** section of the main dashboard.
   A list of domain names associated with your account in the Hosting Services Control Panel displays.
2) Click the [Add New Subdomain] button. The Add New Website (Subdomain) screen displays, which allows you to assign a new subdomain to a current 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: Mail Hosting | Exchange**: If this subdomain is to be used for an Exchange email account, make the choice from the drop-down menu. If this option is selected, you need to assign the subdomain to an account subscription (the Subscription drop-down becomes enabled, from which you can select the appropriate subscription).

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

5) Select the Hosted Domains screen and notice that it 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.
Register New Domain — Purchase New Domain

1) From the Hosted Domains screen, click the [Register New Domain] button. The first screen of the Register New Domains wizard displays; you may start the process of purchasing a domain.

2) In the 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.

The Administrator Control Panel searches the Internet and displays a list of all available domains that match or resemble the domain name on the second screen of the Register New Domain wizard.

3) If any of the domains listed represent a domain that you wish to purchase, click the radio button in front of the desired domain name and click the [Next] button.

- If the domain search does not meet your criteria for purchasing a domain name, click the [Back] button to initiate a new search.

The next screen of the Register New Domain wizard displays.
4) Select the registration period for this new domain purchase from the options displayed and click the [Next] button.

   • It is recommended 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.

The next screen of the Register New Domain wizard displays.

5) This screen allows you to assign the domain being purchased to a hosted service.

   Select a subscription and click [Next].
   The final, or confirmation, screen of the Register New Domain wizard displays.
6) Review the domain purchase and click the [Place Order] button (to make the purchase). Your account will be billed accordingly and the domain is registered on your behalf and hosted by your hosted services provider.

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 Registered Domains screen — by selecting the Manage DNS link beside the appropriate domain.

Transfer Existing Domain
The Transfer Existing feature is used to move the registration information for a customer-owned domain from its current registrar to your hosted services provider. This is different from just pointing the DNS records of your existing domain to the Domain Name Servers in that the domain registration itself is transferred to your hosted services provider. This means that your hosted services provider becomes the official registrar of any transferred domains. Subsequently, you will then update the registration for any transferred domains through the Registered Domains features of this Admin Control.

NOTE: By using this feature, your hosted services provider 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 Registered Domains shortcut from the Domains section of the main dashboard.

2) Click the [Transfer Existing] button. The first screen of the Transfer Existing Domain wizard displays.
3) 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 your hosted services provider 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 your hosted services provider.

- 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 your hosted services provider. *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.

A confirmation screen displays indicating that the transfer process has been initiated. As part of the transfer process, your hosted services provider 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 with the transfer codes, they must contact customer service to verify the transaction codes. This protects the domain owner from theft of their domain.

Once your hosted services provider receives confirmation of the receipt of the domain transfer transaction codes, the transfer of the domain to your hosted services provider will be completed, along with hosting of the DNS Records through the Hosting CP. If the customer never gets the transfer email, or fails to verify the transaction codes with customer service, the domain transfer process cannot be completed. Therefore, it is imperative 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 take effect.
Renew

The **Renew** feature is used to quickly renew the subscription period of any customer domains registered through your hosted services provider. Typically, all subscriptions and 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 **Registered Domains** screen, you can check a domain’s **Expiry Date** (expiration date), which displays a number associated with any registered domains that are coming up for renewal. If this date is approaching, use this feature to renew the expiring domain(s).

1) Log into the Control Panel and access the **Registered Domains** shortcut from the **Domains** section of the main dashboard.

2) Click the [Renew] button.
   The first screen of the **Renew Domain** wizard displays. Any domains set to expire are listed.

   ![Renew Domain Wizard](image)

3) Click the radio button in front of any domain(s) that you wish to renew and click the [Next] button.
   - If you do not wish to renew any expiring domains at this time, click the [Cancel] button to end this function.

   ![Renew Domain Wizard](image)

4) Select the registration period for this domain renewal from the options available and click the [Next] button.
   - It is recommended 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.

The final screen of the Renew Domain wizard displays so that you may review the domain renewal details prior to finalizing the order.

5) Click 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 your hosted services provider.

Manage DNS Records (MX, A, CNAME, etc.)
Hosting Services has the ability to host and manage DNS services for your domain name(s). Whether you purchase a new domain through your hosted services provider or transfer an existing one, 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 your hosted services provider, 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 hosted environment. If you are not certain of the proper DNS record settings required to take advantage of hosted services, please contact support or see Step 7 below.

1) To manage your DNS settings for the domains and sub-domains associated with a hosted service, access the Registered Domains shortcut in the Domains section of the main dashboard.

All of the domains and sub-domains associated with your hosted services are listed so that you may access the DNS records associated with each.
2) Click the **Manage DNS** link at the far right associated with the domain name you wish to manage. The name of the domain displays at the top to identify the domain with which you are working (as the example shown below).

![Registered Domains](image)

The default **Summary** tab displays the overall status of the domain and the services that are subscribed to the domain.

3) Click the **DNS** tab to view details of this domain from which you may add or modify the domain’s actual DNS records.

![AppPanel](image)

Depending on whether your DNS is hosted with your hosted services provider 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 a 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 the [Change DNS Hosting to Internal/External] button to assign this Hosting CP as the DNS Host of choice for this domain. You will need to assign the domain to a current 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

- ns1.h01.hostedmail.net
- ns2.h01.hostedmail.net

**Domain and DNS Records hosted at [your hosted services provider]:** You may make changes to current DNS records, and/or add new DNS Records to domains hosted by your hosted services provider through this Admin Control.

4) Click the DNS Records sub-tab just below the DNS main tab.

5) You can now click any NS, MX, TXT, A, or CNAME record hyperlink from the Host column to modify it.

To add a new DNS record for this domain, click the [Add New DNS Record] button.
• Note that the NS (Name Server) records cannot be changed, as they represent the name servers.

6) From the DNS Record Type drop-down menu, select the type of DNS record to be added.

Enter the other parameters needed to define this DNS record and click the [Finish] button to complete the addition of this DNS record to the domain name.

7) The following are the various DNS record settings to utilize for hosted Exchange service:

   a. Hosting ALL DNS Records (check Zone management ability for the domain). At your domain registrar point the domain’s DNS records to:
      i. ns1.h01.hostedmail.net
      ii. ns2.h01.hostedmail.net

   For domains that are registered and hosted elsewhere (not your hosted services provider) 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:

   b. MX Records routing for Exchange email only (DNS hosted elsewhere):
      i. Server4.inboundmx.com preference 10
      ii. Server5.inboundmx.com preference 20

   c. CNAME record for Exchange email only (DNS hosted elsewhere):
      i. autodiscover.yourdomain.com that routes to autodiscover.h01.hostedmail.net

   d. TXT/SPF record for Exchange email only (DNS hosted elsewhere) (optional):
      i. TXT: v=spf1 mx include:h01.hostedmail.net include:spf.messagelabs.com ~all
**Exchange**

For most customers, *Exchange* is the most frequently used service, as this menu provides access to all of your email functionality. Administrators will access the *Exchange* menu option (or, in some cases, utilize the shortcuts on the main dashboard) to add and edit mailbox parameters, create and manage contacts, distribution lists, public folders, wireless services, and more.

To view the main features associated with your Exchange service, log into the Hosting CP and access the *Exchange* dashboard from the menu bar. With a new service, you should see a screen similar to the one below, from which you will manage your Exchange features:

![Exchange Dashboard](image)

**Add Mailboxes to Your Exchange Account**

By default, when you order your hosted service, no mailboxes are created. You must log into the Control Panel to create mailboxes for each unique user. You may create as many mailboxes as you ordered when you purchased your hosted service. If you find that you need to purchase additional mailboxes, you can add them to your account through the *Upgrade Wizard* in the *Store* section of the Control Panel’s main dashboard (select *Buy Additional Resources*).

1) Log into the Control Panel, and access *Add New Mailbox* from the *Exchange* section of the main dashboard (you can access the same screen by selecting the *Exchange* option from the menu bar at the top of the screen and clicking the [*Add New Mailbox*] button).

The first screen of the *Add New Mailbox* wizard displays.

![Add New Mailbox](image)

**NOTE:** If you do not see the [*Add New Mailbox*] button, you do not have any mailboxes available for your account. Add additional mailbox resources though the *Upgrade Wizard* in the *Store* section of the Control Panel’s main dashboard (select *Buy Additional Resources*).

This screen allows you to designate this mailbox as being assigned to a user within your account who has not previously been setup for any services; or if the user has been previously setup with either Exchange or SharePoint services, this step will allow you to skip the need to create the user.
- **New Service User**: Select this option if the user has never been setup with either Exchange or SharePoint service.
- **Existing Service User**: Select this option if the user had previously been setup with either Exchange or SharePoint service.

2) Select the radio button as needed and click the [Next] button.

**NOTE:** You may view all Users setup with any service subscription assigned to your account by accessing the Exchange | Service Users menu options.

3) For the purposes of this example we will select **New Service User**.
You should see a screen similar to the following that allows you to define the new mailbox information.

![Add New Mailbox](image)

4) Enter information for each input and click the [Next] button.

- **Display name**: This represents the name displayed to others when recipients receive email from this mailbox. Enter a display name exactly as you wish it to appear. *(Examples: Dr. James Jones; Information for MyDomain.com; Joe Smith—(Company, Inc), etc.).*
- **Login**: Create a unique user login for the mailbox. Suggested logins utilize the first.lastname@yourdomain.com format.

**IMPORTANT NOTE:** Login names are not case-sensitive. The system sees “Joe.Smith” the same as “joe.smith” or “JOE.SMITH.”

- **Password**: Create a password by typing it in the Password and Confirm password fields. *(See Log into the System for info about password requirements.)*
- If you want the system to generate a random password for you, click the [Generate New Password] button.
5) On this screen, the E-mail Address is carried over from the previous screen, but you can edit it if you wish. Ensure that the domain selected from the drop-down list is correct—this will be the user’s primary email address (the “from” address on all emails). Additional email aliases for this mailbox can be added later.

Edit the amount under Size Limit to whatever storage limit this mailbox should have. The default is **500MB**. No matter which mailbox package/plan was purchased, the mailbox storage is aggregated, so you can assign large amounts of storage to some users and very little to others.

**NOTE:** Under the Size Limit setting for this individual mailbox, the total available space that remains in your account is indicated to help you manage allocating mailbox space to individual mailboxes.

Finally, ensure that you check the boxes next to each service/feature that this mailbox should have enabled. Depending on your purchased mailbox plan, you may or may not have sufficient ActiveSync, OWA, or full Outlook access for all of your mailboxes. If you have used up your limit in any category, the check box will be grayed out and you will not be able to select it.

6) Click the [Finish] button when all settings are correct.

**IMPORTANT:** For accounts that have “OWA-Only” subscriptions, the Outlook Access option under the Mailbox Access section will be unavailable. Accounts that want the ability to connect to their Exchange mailbox via Outlook (or Mac client software) may upgrade their subscriptions via the Billing | Upgrade Wizard menu option.

The mailbox is created. Mailbox creation is generally completed very quickly. You may continue creating mailboxes or go to other areas of this Control Panel while the mailbox is created. You may also click the Refresh link at the top right of screen to update the status of the new mailbox.
When the new mailbox has been fully created the **Status** will change from “Creating” to “Ready” and is then ready for user login. You can also click the mailbox name/hyperlink to add additional email aliases, forwarding, enable wireless services, etc.

**Import Mailbox Information**

Rather than adding mailboxes individually, you may utilize the [Import Mailboxes] button to batch create mailboxes based upon the data parameters required to create and add mailboxes to your Exchange account. The import file is typically a comma delimited (.csv) file but you may utilize other parameters to separate the data fields used to import the data used to create batch mailbox file.

1) Log into the Control Panel, and access the **Exchange** dashboard from the menu bar.

2) To batch create mailboxes from an imported data file, click the [Import Mailboxes] button. The **Import Mailboxes** screen displays.

3) After preparing your batch import file, click the [Browse] button and select the file to be imported from your PC or network.
• **Separator:** From the drop-down menu select the delimiter character used to separate data variables in your import file:
  - Note the delimiter types shown above: *Comma; Semicolon; or Tab.*
• **Encoding:** Select the appropriate encoding:
  - Users typically select the *Auto-detect* default value unless they have a specific need for their encoded data.
• **Help | Format Description:** Click the [View] link to display detailed instruction on creating a batch import file.
• **Help | Sample CSV file:** Click the [Download] link to download to your PC a sample file that may be viewed to assist in creating your own import file.

4) Click the [Next>>] button when finished defining your import parameters. A message displays that the mailboxes are being created. You do not have to wait for this processing to finish—you may select other menu options, etc. You may also click the [Refresh] link at the top right of this page after a few seconds, and the successfully updated mailbox information displays.

**NOTE:** This “Import” feature may be used to batch create Contacts, Distribution Lists, etc.

Add Resource Mailboxes to Your Exchange Account

Many organizations have the need to create mailboxes that represent resources such as conference rooms, or equipment items such as whiteboards, projectors, and so forth. By creating such resources, users can then book them via the calendaring feature of Exchange in much the same way that they would book fellow attendees, thereby reserving the resource item for their use.

1) Log into the Control Panel, and access the **Exchange** dashboard from the menu bar.

2) Select the **More Services** tab.

3) **On the More Services tab, select Resource Mailboxes.**
   The Resource Mailboxes screen displays:

4) **Click the [Add New Resource Mailbox] button.**
   The Add New Resource Mailbox screen displays:
5) Enter an **Alias**, **Display name**, **E-mail Address**, and **Size limit** in the **General** section of the screen.

6) Select a **Resource type**: Room or Equipment.
   - **Room**—assigned to a meeting location, such as a conference room, auditorium, or training room.
   - **Equipment**—assigned to a resource that is not location specific, such as a portable computer projector, microphone, or company car.

7) Provide resource details in the **Resource location** and **Resource capacity** fields, if available.
   
   **NOTE:** Resource location would apply to a piece of equipment, such as those listed above; Resource capacity refers to the amount of people the room will hold.

8) Click [Submit].
   The new resource mailbox displays on the **Resource Mailboxes** screen:
Delete Mailboxes from Your Exchange Account

You can delete mailboxes that are no longer needed (e.g., ex-employees) at any time through the Hosting CP.

**NOTE:** When you delete a mailbox you must also disable any wireless options associated with the deleted mailbox; they will not automatically be removed from your account. See *Configure Wireless Services*, later in this document, for more information about disabling wireless options.

1) Log into the Control Panel and access the Exchange dashboard from the menu bar. The **Mailboxes** list displays.

2) Click the checkbox preceding any mailbox(es) to be deleted.

Click the [Delete] button (which activates when a mailbox has been selected).

- You may delete multiple mailboxes by clicking additional checkboxes.
A warning confirmation dialog window displays to ensure that the mailbox deletion is what you actually want to implement.

- Click [OK] to confirm that you want to delete the mailbox(es) selected
- Click [Cancel] to abort the mailbox deletion process.

If you complete the mailbox deletion procedure by clicking the [OK] button, the Mailboxes list is updated to confirm that the mailbox(es) deletion has been received and is being processed.

- Your subscription resources will automatically be updated.
- All add-on resources, such as wireless service, will automatically be updated and any billing for such add-on resources will be modified accordingly.

**Configure Email Alias(es) — Additional Email Addresses for a Mailbox**

You can add an unlimited number of email aliases to a mailbox. An alias address means that the user can receive email sent to any user-defined email alias address, but all email is still sent outbound using the primary email address.

1) Log into the Control Panel and access the Exchange tab from the menu bar. A list of all mailboxes displays.

Select the mailbox to which you would like to add an alias by clicking its hyperlink from the Display name column.

The mailbox detail screen displays for this user’s mailbox.
2) **Click the E-mail addresses tab to add additional email aliases to the mailbox.**  
All current email addresses for this user/mailbox display.  
The Primary address is identified with the **green icon** under the **Primary e-mail address** column. This is the email address that is used when the user sends, forwards, or replies to an email or other mailbox item.

3) **To create a new email alias address, click the [Add New E-mail Address] button.**  
The **Add New E-Mail Address** screen displays.
4) Type the new email alias prefix in the **E-mail address** input box and use the drop-down menu of domain names available for your account.

If you have multiple domains under your account you can select the desired domain from the drop-down menu.

Click the **[Submit]** button.

A message displays that the alias address is being created. You do not have to wait for this process to finish—you can go on to create additional settings or mailboxes.

5) Click **Refresh** at the top right of this page after a few seconds, and the successfully updated alias is shown as added to the mailbox. All email addresses for this user/mailbox display.

You may continue adding email alias addresses to this user/mailbox by clicking the **[Add New E-mail Address]** button.

- Now that multiple email addresses have been defined for this mailbox, you may change the primary email address by clicking the **[Change]** button. A list of all email aliases for this mailbox displays.

  Click the **Set as Primary e-mail address** link to change the primary email address for the mailbox.
Configure Email Forwarding

1) Log into the Control Panel, and access the Exchange tab from the menu bar. The list of all mailboxes displays.

2) Select the mailbox to which you would like to define a forwarding email address by clicking the hyper-link under the Display name column. The user/mailbox details screen for the selected email address displays (see example below).

3) Click the Forwarding tab.

4) To enable forwarding, click the [Enable] button. The screen changes to enable you to select the email address to which you would like to forward your messages.

5) In the E-mail address input box, type the email address to which you would like to forward your messages.

   If you wish to leave a copy of your email messages in your mailbox (in addition to the copy being forwarded), click the checkbox next to Leave copy of messages.

   Once you have defined the forwarding email address, click the [Submit] button.

   - If you do not click the Leave copy of messages checkbox, email will be forwarded to your external email address without saving a copy in your mailbox.
A confirmation screen displays the forwarding parameters submitted.

6) From the confirmation screen you can click the **[Disable]** button to cancel the forwarding or click the **[Change]** button to edit the forwarding email address defined.

**NOTE:** To forward to multiple email addresses, create a Distribution List and use the list’s email address as the email forwarding property.

### Manage Mailbox Limits

One of the primary duties of the administrator is to monitor the size of your users’ mailboxes to insure that they do not exceed the size limit on the server. Once the mailbox limit has been exceeded by approximately five percent (5.0%), the communication to the Exchange mailbox will shut down and the users will no longer be able to send or receive email. Users receive an Exchange system notification email when their mailboxes reach a pre-defined “warning limit” that the mailbox is approaching capacity. Upon receiving such a warning, the mailbox needs to be managed by either utilizing the archiving features of Outlook or Entourage, or by increasing the mailbox size.

Administrators should routinely access the *Storage Usage Report* in order to remain aware of users’ mailbox size limits and usage in order to effectively manage the total allocated storage space.

1) To manage the mailbox limits of any user’s mailbox, log into the Control Panel and access the **Exchange** tab from the menu bar. A list of all of your users’ mailboxes displays.

2) Click the **Display name** link to select a mailbox in order to edit its parameters including the size limits. Details for the selected mailbox display.

3) Click the **Limits** tab to edit the **Mailbox Size** information associated with this user’s mailbox.
• The Size graphic in the Mailbox Size section provides an illustration of the capacity of the mailbox. Typically, this will be near or exceeding 100%.

2) Click the [Edit] button at the bottom of the screen to gain access to change the three mailbox size inputs. You should change all three of the size inputs in order to successfully change the user’s mailbox size:

   • **Issue warning at**: When the mailbox reaches this size, the system notification warning email is sent to the user to indicate that the mailbox is reaching its capacity prior to being locked down. Typically set this value at 20 – 50 MB less than the actual size of the mailbox in order to provide adequate warning for the mailbox size to be adjusted.

   • **Prohibit sending at**: Typically set this value to the same as the actual mailbox size. When this limit is reached the user will no longer be able to send email, though if the mailbox still has capacity the user will continue to receive email. This limit is utilized for users who routinely send large attachments in order to avoid accidently locking down the mailbox due to sending a large email when nearing mailbox capacity.

   • **Size limit**: This represents the actual capacity of the mailbox. Base the other two inputs above upon the value set here as the mailbox capacity.

3) Click the [Submit] button once you have made the necessary changes to the mailbox capacity to schedule the size modification to the mailbox.

   The updates to the Mailbox Size inputs entered now display.

4) Click the [Update Size] button to schedule a task that will retrieve the actual mailbox usage size on the Exchange server. The Usage Size is updated every 24 hours, so that the Control Panel may not accurately reflect the actual mailbox usage size of the mailbox on the Exchange server. Outlook Web App (OWA) will show the most accurate mailbox size, as that is the mailbox on the Exchange server.

   **IMPORTANT NOTE**: It may take up to one hour for these changed to be replicated on the Exchange server for the mailbox limits to take effect. If access to the mailbox has been locked down, the user may not regain access for up to the time it takes the mailbox to be resized on the server (one hour).
• To gain access sooner, access the user’s mailbox via OWA and empty deleted items and/or completely delete other items from the mailbox in order to bring the mailbox back down below its original Size limit value.

5) After completing the management of the mailbox size limits, the Mailboxes screen is updated to reflect the new mailbox sizes for your user mailboxes.

Add a Contact to Exchange
Contacts, by definition, are email addresses that may be added to your account Global Address List (GAL) that represent email addresses OUTSIDE of your account domain(s) (i.e., “external” email addresses). Most Exchange users will want to create general contacts from within Outlook for everyday communications with recipients of your day-to-day email correspondence. However, you may wish to create contacts to be added to your account GAL for the purposes of having emails routed to these contacts that may be associated with your business in some manner.

• Example 1: You wish to create an email for webmaster@mydomain.com, which routes to a sub-contractor who is not part of your company domain (see example below).

• Example 2: You wish for a Distribution List email address to route to someone outside of your domain (a partner vendor, etc.), and therefore need to define the contact email address to be added as a member of the Distribution List.

You may create unlimited contacts; they do not take up storage space on the server, since emails sent to contacts route outside of your domain account.

1) Log into the Control Panel and access the Exchange tab from the menu bar.

2) Select the Contacts tab.

3) Click the [Add New Contact] button.

   NOTE: You may use the [Import Contacts] button to create multiple contacts from a comma, tab, or semicolon delimited file. See the Import Mailbox Information section for detailed instruction.

   The Add New Contact screen displays.
4) Define the following inputs:

- **Alias**: A shorthand reference for the contact.  
  **NOTE**: You cannot leave spaces in the alias name.
- **Display name**: How the contact will be displayed in the GAL.
- **External e-mail address**: A free-form field to enter the actual delivery email address for the contact being defined.

To define the contact as a general contact for external delivery without assigning an account domain to the contact click the [Submit] button.

5) If you want this contact to be assigned an email address that corresponds with an account domain, click the checkbox next to **Assign e-mail address** from within **E-mail Address** section.

When finished defining this contact, click the [Submit] button.

- **E-mail address**: Enter the prefix for the email address to be assigned to this contact and select the appropriate domain alias from the drop-down menu.

6) A message displays that the contact is being created.
You do not have to wait for this process to finish—you may select other menu options, etc.

You may also click the Refresh link at the top right of this page after a few seconds, and the successfully updated contact information displays.

You may continue adding contacts by clicking the [Add New Contact] button.

- Note that in the above example through the Admin Control you are able to create an email address associated with your domain (**Example**: webmaster@mydomain.com) that is delivered to an email address/person that is NOT associated with your domain (routed to the contractor at mywebmaster@mywebmasteremail.com in this example). There is **NO CHARGE** for this address as it does not take up space on the Exchange server.
Create Distribution Lists

Administrators can create an unlimited number of distribution lists for your organization. Distribution lists are not “mailing lists” of people outside of your organization. They are meant to help you organize your addresses into groups and send messages to everyone who is a member of that group. For instance, you can create a distribution list called “Sales,” and add all of your sales staff to that distribution list. When you send a message to “Sales,” it is delivered to every mailbox that is a member of the “Sales” distribution list.

1) Log into the Control Panel, and access the Exchange tab from the menu bar.

2) Select the Distribution Lists tab.
   All distribution lists currently defined for this account are listed under the Display Name column.

<table>
<thead>
<tr>
<th>ID</th>
<th>Display name</th>
<th>Alias</th>
<th>E-mail address</th>
<th>Accept messages from</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>35403128</td>
<td>All Exchange users</td>
<td>sep0262070</td>
<td></td>
<td>NO ONE</td>
<td>READY</td>
</tr>
</tbody>
</table>

3) The Add New Distribution List screen allows you to define the distribution list.

   - The Alias is a quick/shortened name that can be quickly typed by other users when addressing an email to this distribution list.
   - The Display name is the full name of the distribution list, as it would appear in the GAL.
4) Type an email address prefix for the distribution list in the E-mail address input box and select the appropriate domain from the drop-down menu if you have multiple domains associated with your account.

Define the nature of email delivery for this distribution list in the Security section:

- **Everyone**: Allows senders from the Internet to send email to this distribution list email address. This is the least secure option allowing anyone to send email to this address.
- **Organization**: Allows only senders from within your organization (account) to send email to this distribution list email address.
- **Members**: Allows only members of the distribution list itself to send email to this distribution list email address. This is the most restrictive security option.

**NOTE**: Customers should use caution on accepting the default of “Everyone” if you are using common distribution list email addresses, such as “Sales,” “Marketing,” or “Info,” etc. These are common email addresses that may susceptible to email spammers.

On this screen you will also select whether this distribution list should appear in your GAL by clicking the checkbox next to Show in address book. If this checkbox is unchecked, the distribution list is still valid, but will NOT be displayed in the GAL.

5) Click the [Submit] button to finalize your creation of the distribution list. The system shows you that the new distribution list is being created.

6) You may continue to work within this Control Panel, or you may click the Refresh link in the right corner to see the status of the new distribution list change to “Ready.”

   - Note that, at this time, you can continue to create additional distribution lists, import a file to create multiple distribution lists, and delete or edit previously created distribution lists.

7) To add multiple members—mailboxes and/or contacts—to a distribution list, access Distribution Lists tab again.

   You can also assign a member to distribution list(s) from the individual mailbox/contact (which takes a while). See Add a Mailbox to a Distribution List for additional instruction.

8) Select one of the pre-defined distribution list(s) from under the Display name column. The Distribution List Details screen displays.
You may select any of the tabs across the top to access details associated with the distribution list. These tabs enable you to add mailboxes and/or contacts as “Members” to the distribution list, adjust security settings, and also change the email address(es) as needed to manage the distribution list.

9) Click the **Members** tab to add mailboxes and/or contacts as members to this distribution list. A list of currently defined members (if any) displays.

10) To add members to this list, click the [Add New Member] button. The **Add Distribution List Member** screen displays.

11) Select the member(s) to be added to the distribution list by clicking the checkbox in front of each member.

When finished with your selection of distribution list members, click the [Submit] button.

**NOTE:** A distribution List may contain a single member, or multiple members—mailboxes, contacts and/or email-enabled Public Folders—as long as the members have valid email addresses.

The distribution list updates to show “Adding” in the **Status** column to indicate that the changes are being made.

You can continue working in this Control Panel, or you can click the **Refresh** button in the top right corner to see when new members are listed as “Ready” in the **Status** column.

**Add a Mailbox to a Distribution List**

1) Log into the Control Panel, and access the **Exchange** tab from the menu bar.
From the list of mailboxes created under your account, select the mailbox that you would like to add to any pre-existing distribution lists.

The **Mailbox Details** screen displays.

2) **Select the Member of tab.**
   All distribution lists to which the mailbox is currently subscribed are listed for your review.

3) **To add the mailbox to additional distribution lists,** click the [Add to Other Lists] button.

   **NOTE:** To delete this mailbox from distribution lists displayed, click the appropriate checkbox(es) associated with the distribution list and click the [Delete] button.

   The list of available distribution lists displays.
To add this mailbox to any of the currently defined distribution list(s), select the checkbox(es) corresponding to the appropriate distribution list(s) and click the [Submit] button.

- You can select multiple distribution lists if you wish (if available).

**NOTE:** If the distribution list you want has not yet been created, refer to instructions in the previous section, *Create Distribution Lists.*

5) A message displays that the mailbox is being added to the selected distribution lists. You do not have to wait for this process to finish—you may select other menu options, etc.

**Mailbox Permissions**

Mailbox permissions allow the user(s) who own the permissions to open and view the contents of the mailbox granting permissions to that user. Typically, this is utilized by Administrators to “monitor” the mailbox for which they have permissions. Once the mailbox permissions rights have been defined in this Control Panel, the appropriate mailbox rights settings must be configured in the Outlook client software in order to open and view the mailbox to which the user has rights.

1) To assign mailbox permissions to a pre-defined mailbox, log into the Control Panel and access the Exchange tab from the menu bar.

2) Select the Permissions tab.

   Notice that there are two options, or sub-tabs, from which to choose at the top of the list, Mailbox Permissions and Send Permissions:

3) Select **Send Permissions**.

   The screen changes and the Send Permissions tab is now in the forefront.
4) Click the [Grant permissions] button. All services defined in your Exchange account display.

5) Select the appropriate Send Permission value (Send As, Send on Behalf) for the mailbox(es) to whom you wish to provide access to this mailbox.

- **Send As:** Allows the mailbox to use the [From...] button in Outlook and select this Display Name from the GAL in order to deliver email that appears to come from another mailbox or distribution list.
- **Send on Behalf:** Allows the mailbox to use the [From...] button in Outlook and select this Display Name from the GAL in order to deliver email that is “Sent on behalf of X by Y,” where Y=this mailbox and X=the selected mailbox or distribution list.

6) Click the [Submit] button to finalize your selection.

7) Only the type “Mailbox” should be selected from the Type column as only other mailboxes can utilize mailbox access permissions.

The selected mailbox’s permissions information is updated to show all mailboxes within your account that have access permissions to this mailbox.
8) You may remove the mailbox permissions by selecting the checkbox in front of the display name and clicking the [Revoke Permissions] button.

**Company Disclaimers**
Exchange includes the ability to add HTML or text disclaimers to email messages. Disclaimers are typically used for legal information, warnings about unknown or unverified email senders, or for other reasons as determined by an organization.

Here is an example of an email disclaimer:

**IMPORTANT NOTICE:** This email message is intended to be received only by persons entitled to receive the confidential information it may contain. Email messages to clients of Contoso may contain information that is confidential and legally privileged. Please do not read, copy, forward, or store this message unless you are an intended recipient of it. If you have received this message in error, please forward it to the sender and delete it completely from your computer system.

1) Log into the Control Panel, and access the Exchange dashboard from the menu bar.

2) Select the More Services tab.

3) On the More Services tab, select Company Disclaimers.
The Company Disclaimers screen displays:
4) Click the [Add New Disclaimer] button. The first screen of the Add New Disclaimer wizard displays:

5) Enter a Display name and select the type of recipients to whom to send the disclaimer.

6) Click [Next]. The second screen of the Add New Disclaimer wizard displays:

7) Provide details for the new disclaimer:
   - Select a Location in the email at which to add the new disclaimer: **Append** (end) or **Prepend** (beginning).
   - Enter a checkmark for **Use separator** to include a line that separates the disclaimer from the rest of the email message.
   - Select a **Font**, font **Size**, and **Color** for the disclaimer text.
• Select a **Fallback action** from the drop-down list: **Wrap**, **Ignore**, or **Reject**.
  - **Wrap** — If the disclaimer can't be inserted into the original message, Exchange encloses, or "wraps," the original message in a new message envelope. Then the disclaimer is inserted into the new message.
  - **Reject** — If the disclaimer can't be inserted into the original message, Exchange doesn't deliver the message. The sender of the message receives a non-delivery report (NDR) that explains why the message wasn't delivered.
  - **Ignore** — If the disclaimer can't be inserted into the original message, Exchange delivers the original message unmodified. No disclaimer is added.

• Enter the disclaimer message in the **Text** field.

• Click **[Next]**.

The final screen of the **Add New Disclaimer** wizard, a confirmation screen, displays:

![Add New Disclaimer Wizard](image)

8) **Review the parameters you have selected for the new disclaimer and click [Finish].**

The new disclaimer is added to the list of disclaimers on the **Company Disclaimers** screen:

![Company Disclaimers](image)
Public Folders

Public folders are an optional service available to all hosted Exchange customers. Public folder space is allocated from your total aggregate Exchange storage space. You can purchase additional Exchange storage space through the upgrade wizard in the Store section of the Control Panel’s main dashboard.

Public folders contain items that can be viewed by any or all members of your organization—who have given proper public folder permissions—via your Outlook (or Entourage) desktop software, or the Public Folders option in OWA. The public folder can be standard folders for storing email and/or files, or they may be any of Outlook’s specialty folders: Contact, Calendar, Notes, Tasks, etc. For instance, you can create a public folder calendar called “Company Vacations” to track and manage your company-wide vacation scheduling.

Add Top Level Public Folders

Standard, non-email enabled, public folders typically can be managed via the Outlook email client software. However, we suggest that you use this function to setup standard “top-level” public folders (see NOTE below). Most importantly, to email-enable a top-level public folders you MUST use the Hosting Control Panel.

1) Log into the Control Panel, and access the Exchange tab from the menu bar.

2) Select the More Services tab, and then select the Public Folders option.

You may click any previously defined public folder (if available) listed under the Name column to edit parameters associated with a folder.

3) To create a new public folder, click the [Add New Public Folder] button. The Add New Public Folder screen displays.

4) Enter the folder name in the Public Folder Name input field.
NOTE: It is recommended that all public folders should be created within Hosting CP so that their permissions, security, size limits, and email settings can be managed in the Hosting CP. The Hosting CP can create top-level and sub-folders in Exchange. If public folders are created only using an Outlook client, these public folders will not appear in the Hosting CP — these folders will still be functional but just not managed through Hosting CP.

Change the Size Limit from its default setting if you need additional space for the contents of this folder.

From the Default role drop-down menu select the permissions level to the public folder be granted to all users within your organization as the default permissions for that public folder:

- **Reviewer**: Gives the default user permission to read items in the Exchange public folder. But they are not allowed to edit or delete items, regardless of whether they previously created those items or not.
- **Contributor**: Create items and files only. The contents of the files do not appear.
- **Non-editing Author**: Create new items but cannot edit content produced by others.
- **Publishing Author**: Create and read items and files, create subfolders, and modify and delete items and files you create.
- **Author**: Create and read items and files, and modify and delete items and files you create.
- **Publishing Editor**: Create, read, modify and delete all items and files, and create subfolders.

For additional information about the Mail-Enabled checkbox, see the Email Enable Public Folders section below.

**Email Enable Public Folders**

A public folder can also be email-enabled, turning it into a receptacle for receiving emails, like a mailbox. For example, you can create a public mail folder called “Jobs” with an email address of jobs@mycompany.com. You can advertise this address, and prospective employees can email their resume to the jobs address. The email will then be delivered to the public folder, where anyone in your organization who has proper permissions can view them.

1) Check the box next to Mail-Enabled if you would like this public folder to receive emails.

- **Email address**: Enter the desired email address prefix in this field. Select the appropriate domain name from the drop-down menu if your account has multiple domains.
- **Show in address book**: Check this option to have this public folder email address displayed in the Global Address List (GAL). Uncheck this option if you do not wish this public folder email address to show in the GAL.
- **Accept messages from**: Select one of the two radio button options to specify the type of email delivery for this email-enabled public folder:
  i. **Everyone**: Accepts email from any valid sender from your organization OR the Internet.
  ii. **Organization**: Limits email delivery to only users from within your organization.

2) Click the [Finish] button when you are done entering your parameters for creation of this public folder.
You may continue to work within this screen, or wait for the public folder to be created (typically within one minute).

- Note that the public folders that have been email enabled have a green icon in the Mail-Enabled column along with the corresponding primary email address of the public folder.

3) To edit the parameters associated with a public folder, access the Public Folders list again.

You may click any previously defined public folder listed under the Name column to edit its parameters.

4) Click any of the tabs across the top to change permissions, add/remove email addresses, or change the size limits for this public folder.

You can also see the current size/storage usage of the public folder compared to the maximum limit, and even limit the size of attachments/message sizes in the public folder.

Create Sub-folders of Top-Level Public Folders

Though public folders can be created through the Outlook client software, it is best to create your entire public folder structure via the Hosting Control Panel. This insures that all of the structure, storage levels, email-enabled folders, and permissions are implemented in the appropriate way as determined by your company administrator.

To create a sub-folder of a previously created top-level public folder:

1) Log into the Control Panel and access the Exchange tab from the menu bar.

2) Select the More Services tab, and then select the Public Folders option.

3) To create a new public folder, click the [Add New Public Folder] button. The Add New Public Folder screen displays.

4) Select (click) the radio button associated with the folder you wish to make the parent folder, and click [Next].

5) Complete the remaining public folder input options as previously described.

- You may make the folder an email-enabled folder.
- Click the [Finish] button to complete the creation of this sub-folder within the public folder structure.
The newly created sub-folder is now listed under its top-level parent folder and slightly indented within the **Public Folders** main page listing of all of your company’s public folder structure:
Storage Usage Report
As part of your mailbox plans or bundles, your company has purchased an aggregate amount of storage that can be allocated to individual mailboxes as you wish via the Hosting Services control panel. You may use the Storage Usage Report to view your aggregate account storage amounts.

1) Log into the Control Panel, and access the Exchange tab from the menu bar.

2) Select the Storage Usage Report tab.

3) Click the [Update Usage Info] button to force a scheduled update.

Also note that recent deletions of emails or folders in one or more mailboxes do not immediately update your total used storage in certain cases (this is not necessarily useful as a “real-time” monitor of your storage usage).
Configure Wireless Services

Synchronization to BlackBerry SmartPhones can be configured from the Hosting Services Control Panel under Exchange > Mobile Devices menu options.

ActiveSync PDA synchronization is also available, but is configured via Exchange > Mailboxes > Select Mailbox > General > Edit for individual user mailboxes within this Control Panel.

Configure BlackBerry Service

1) Log into the Control Panel and access the Exchange tab.

2) Select the mailbox for which you wish to configure BlackBerry service.

3) Select the Wireless Devices tab.

4) Click the [Create New Account] button to begin the process of configuring an existing mailbox with BlackBerry service.

NOTE: If the Wireless Services tab does not display, you must purchase the Blackberry service resource; see Buy an Additional Resource for additional instruction.

The first screen of the Add New Account wizard displays.
5) You may accept the self-generated BlackBerry activation password or enter your own password. This is the password you will use when activating the BlackBerry device later in the Activation process.

You may also overwrite the default of 48 hours which indicates the duration for which the activation password is valid. If the BlackBerry Activation process is not completed on the handheld within this timeframe, you must regenerate this BlackBerry sync information from the Control Panel.

Typically, users accept all the default values on this screen—including the **E-mail activation password** to the user’s mailbox—so that they can perform the Activation process on their own. If you are the technical administrator for your users/mailboxes and are performing the BlackBerry Activation yourself, you may not want to send the activation email to the end-user.

6) Review each field and edit as needed, changing the self-generated password to something of your own choosing, etc.

Click the **Finish** button to accept the inputs on this screen. The **Wireless Services** tab updates to display the status of your user’s BlackBerry account.
The newly created BlackBerry account is indicated by the word “Creating” under the Account Status column. In this example (for the BlackBerry just created), the “Device Status” shows as “Not available” because the Activation is not yet completed.

7) To see the detailed activation information and status of the wireless device, click [View Details]. A screen like the one below displays:

8) From this screen, you can generate a new activation password ([Generate and e-mail activation password]) and update the device status ([Update device status]) (i.e., refresh this screen to see if the device status has changed).

Once fully activated, this is where you can remotely “wipe” a BlackBerry device, should the end-user lose or have their BlackBerry stolen.

9) If a user leaves your company, or no longer is using a BlackBerry device, you can delete the BlackBerry service for any mailbox by logging into the Control Panel, and access Exchange > select Mailbox > Wireless Services > View Details.

**NOTE:** To delete BlackBerry service for multiple mailboxes, access Exchange > Mobile Devices > BlackBerry Accounts.
• Click the [Delete Account] button.

**NOTE:** Deleting a Blackberry mailbox will not change the resources you have; it will also not affect billing, unless you downgrade your resources.

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**Reset BlackBerry Devices**

It is not uncommon for your employees to change their BlackBerry devices if an old BlackBerry is broken, if a BlackBerry has been lost and the old device was **“wiped” for security purposes**, or if a user simply purchases a new BlackBerry. Additionally, it is not uncommon for an employee’s BlackBerry to stop communicating with the BES server, in which case the user will need to initiate a new Activation from the device for troubleshooting purposes in order to re-establish communication between the handheld device and the BlackBerry Server.

In these circumstances, it is necessary to simply re-set the user’s mailbox BlackBerry service enterprise activation password, and then have the user perform a new “enterprise activation” from the BlackBerry device itself to re-connect the new device to the BlackBerry server.

1) Log into the Control Panel, and access **Exchange > Mobile Devices > BlackBerry Accounts**.

   The **Blackberry Accounts** screen displays a list of all mailboxes currently configured with BlackBerry service and the status of each user.

2) From the **Blackberry Accounts** screen, click the user’s **Account** name to display this user’s BlackBerry details page.

3) In the **Device** section, click the **[Generate and email activation password]** button in order to access the window used to reset the user’s service on the BlackBerry server so that the user can implement the “enterprise activation” process from their BlackBerry device to reconnect to the server.

   The activation password operation is completed automatically and emailed to the user.

4) Click the **[Close]** button to complete the assignment of a new activation password.

   • Typically, if you are responsible for implementing the activation, you will enter the desired password and then start the activation process from the Blackberry device itself.

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**“Wipe” BlackBerry Devices**

If a user loses their BlackBerry device you may wish to “remotely wipe” the BlackBerry from the Admin Control. The “wipe” will erase all data from the device and disconnect the device from the server. You will want to utilize this wipe feature as a security precaution in circumstances where the BlackBerry has been lost and you do not want anyone finding the lost BlackBerry to have access to the data on the device.

   ▶ **NOTE:** You must **FIRST** wipe a device associated with user’s mailbox **PRIOR** to re-setting the BlackBerry activation for the device if you want to take advantage of the security wipe feature. Once the user’s mailbox has been “re-set” for enterprise activation, the BlackBerry is no longer connected to the PIN number of the old (lost) device and can therefore not communicate remotely with the lost device to initiate the wipe procedure.
After completing the wipe procedure, you can then proceed to re-set the user’s mailbox for BlackBerry activation, as described above, to connect the user’s new BlackBerry replacement device to the server. To perform a wipe of a user’s BlackBerry device to remotely delete all of the data from the device do the following:

1) Log into the Control Panel, and access Exchange > Mobile Devices > BlackBerry Accounts.

   The BlackBerry Accounts screen displays listing each mailbox currently configured with BlackBerry Service and the status of each user.

2) From the BlackBerry Accounts page, click the user’s Account name to display this user’s BlackBerry details page (below).

3) In the Device section, click the [Wipe device] button in order to initiate the wipe procedure. A warning window displays to ensure that you wish to remove all data from the device.

4) Click the [OK] button to finish the wipe procedure. A second window displays to indicate that the wipe of the device has been completed.

   - If the [Wipe device] button is not available (as in the example above), the BlackBerry device associated with the user is not currently connected to the server and can therefore not be wiped of its data.

5) Once the user has obtained a replacement BlackBerry for their lost device, you can perform a reset of the user’s BlackBerry enterprise activation password so that the user can reconnect their new replacement device to the BES server.
Configure ActiveSync
For users needing Active Sync wireless service for Windows Mobile, iPhone, Android and other ActiveSync enabled SmartPhones will not find a separate menu item to configure ActiveSync. The ActiveSync option is available as part of the mailbox setup procedure and may be turned on when first creating a user’s mailbox.

- See Adding Mailboxes to Your Exchange Account for configuring ActiveSync for new user mailboxes.

For those mailboxes that have already been created and need ActiveSync configured for their PDA device, the procedure is simple to perform.

1) Log into the Control Panel, and access the Exchange tab from the main dashboard. The Mailboxes screen displays.

2) To access the ActiveSync options for any mailbox click the hyperlink for the mailbox under the Display Name column. The details screen for this mailbox displays (below).
NOTE: If the ActiveSync option is not available (as in the example above), it may be purchased.

The ActiveSync option is found in the Mailbox Access section. Mailboxes without ActiveSync will be displayed as “Disabled” next to the ActiveSync option.

3) Click the [Edit] button at the bottom of the screen to configure Active Sync for this mailbox. The fields become editable (see below).
4) In the **Mailbox Access** section, the options change from radio buttons to checkboxes.

Click the checkbox for **Active Sync** and then click the [Submit] button to configure the mailbox for Active Sync.

**NOTE:** If there is a “Limit Reached” message beside the **ActiveSync** checkbox, you must purchase additional resources. See **Buy Additional Resource** for more information.

5) The screen updates to indicate that ActiveSync has been “Enabled.”
Instructions for setting up ActiveSync for Windows Mobile, iPhone, and Android devices

To setup ActiveSync on a Windows Mobile device:

- From the device’s Home screen select **Start > ActiveSync** (Optionally **Start > Programs > ActiveSync**)
- Click the link to setup device to sync with Exchange Server
- On the **Edit Server Settings** screen for the **Server address** enter: `mail.h01.hostedmail.net`
  i. Check the box for “The server requires an encrypted (SSL) connection” and click **Next**
- On the next **Edit Server Settings** screen enter the following:
  i. **User name:** your Exchange user name
  ii. **Password:** your Exchange password
  iii. **Domain:** `yourdomain`
  iv. Check the “Save Password” checkbox and click **Next**
- On the next **Edit Server Settings** screen check the items to be synchronized which typically include:
  i. Contacts
  ii. Calendar
  iii. Email
  iv. Tasks
- Click **OK** on the ActiveSync warning indicating that the Exchange Server must enforce the security policy

To setup ActiveSync on an iPhone device:

a. From the device’s Home screen select **Settings > Mail, Contacts, Calendars > Add Account > Microsoft Exchange**

b. On the **Exchange** screen enter:
  i. **Email:** Your Exchange email address
  ii. **Server:** `mail.h01.hostedmail.net`
  iii. **Domain:** leave this field blank/empty
  iv. **Username:** Your hosted services user login
  v. **Password:** Your hosted services user password
  vi. **Description:** The iPhone will default to your email address entered above
  vii. **Use SSL:** On
      i. Click the [Next] button, in the upper left corner, and the iPhone/iTouch will attempt to connect to the Exchange Server

c. On some devices the **Server:** field is not displayed initially in step b. This field should be displayed after clicking [Next] in the step above. Enter the proper Server name if prompted and click [Next] again
  i. **Server:** `mail.h01.hostedmail.net`

d. On the next **Exchange ActiveSync** screen check the items to be synchronized which typically include:
  i. Mail
  ii. Contacts
  iii. Calendar

e. Other options on this **Exchange ActiveSync** screen include:
  i. **Mail Days to Sync**
To setup ActiveSync on an Android or other Smart Phone device:

On the Smart Phone device, enter the following information:

Server:  mail.h01.hostedmail.net

Email: Your Exchange email address

Domain: yourdomain (Optional. For some devices you may leave this blank.)

Username: Your Exchange user name (typically first.lastname@yourdomain.com)

Password: Your Exchange password

Description: You can enter any information you would like in this field. Typically, this is your Display name.
Service Users

A “Service User” is a member of your organization that has been assigned to any of the hosted services to which your organization has subscribed. The Service Users feature in the Admin Control allows you to assign and manage all of the users in your account as it relates to the various services your organization is using. This section allows you to manage multiple service subscriptions for a single user at a time and provides administrators with a single convenient location to review those users subscribed to the various services provided for your account.

To view your account service users, log into the Control Panel and select the Users tab from the menu bar of the main dashboard.

The Users dashboard displays a list of current service users and the services to which they are subscribed (under the Services column):

About the Users dashboard:

- **Display Name**: How the service user name displays to others
- **Login**: The login credentials for the service user
- **Services**: Displays the services to which the service user is subscribed
- **Status**: Displays the current availability of the service user to utilize the service(s)
- **Enabled**: Indicated if the service user has been enabled to utilize various service subscriptions
- **Read only**: Displays the current status of the service – yes/no
- **Login**: Click this link to access the login information for the service user selected
Add Service Users

1) To create a new service user, click the [Add New Service User] button.

The Add New Service User screen allows you to identify the parameters for this new service user and simultaneously assign the service user to multiple services subscribed to by your account.

2) Enter the information associated with this new service user as needed and click the [Next] button.

If your account contains multiple domains, select the domain to be used as the primary login domain from the drop-down menu.

- **Main** section: In this section define the service user parameters for creating this new service user:
  - **Display Name**: How the service user name will be displayed to others
  - **Login**: Create a unique user login for the mailbox. Suggested logins utilize the first.lastname@yourdomain.com format.

  **IMPORTANT NOTE**: Login names are not case-sensitive. The system sees “Joe.Smith” the same as “joe.smith” or “JOE.SMITH.”

  - **Password and Confirm Password**: Enter a login password for this service user and confirm the password in the confirmation field.
    - The Admin Control may display warning messages related to the security of passwords entered.
    - **Optional**: You may click the [Generate new password] button to have the new password generated automatically.

- **Services** section: Click the checkbox(es) for those services to be added to this service user. You may select multiple services in this section (if available).

The appropriate setup screens display based upon the services selected in this step.
After completing all of the detail screens associated with any new services subscribed to for the selected service user, the **Add New Service User** summary screen displays.

3) Review the summary information and then click the [Finish] button to accept all of the parameters entered to create this new service user.

The updated **Users** list displays, indicating the results of adding the new service user along with a table detailing the specifics of all currently defined service users. From this screen you can continue to add new service users or delete or manage the service users currently listed.

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**Change/Edit Login of a Service User**

If you have multiple domains associated with your account, you may associate any of the domains to any of your service users to define the primary domain login for each service user.

1) Log into the Control Panel and select **Service Users** from the menu bar of the main dashboard. The **Service Users** screen displays a list of current service users and the services to which they are subscribed under the **Services** column.

2) To change the primary domain associated with any of the listed service user, click the checkbox(es) in front of each service user to be selected and then click the [Change Domain] button.

- You may select multiple service users to be modified with a domain change.
The screen changes to enable you to select a domain and to synchronize the primary e-mail address.

3) From the **Domain** drop-down menu, select the appropriate domain to be associated as the primary domain for those service users selected (any domains associated with your account may be accessed from the **Domain** drop-down menu).

   - Click the **Synchronize primary e-mail address** checkbox if you want this new domain to become the primary (reply to) domain associated with each service user selected.

4) Click the [Submit] button.
The main dashboard displays.

5) Access the **Users** dashboard once again to view the changes that have been made to your account. From this screen you can continue to manage your service users or access other menu items from the Control Panel.

**Modify Current Service Users**

The **Users** dashboard displays a list of current service users and the services to which they are subscribed under the **Services** column. Administrators can modify the details associated with current users from this screen.

1) Click the hyperlink of any service user defined under the **Display Name** column to gain access to the details of that service user.
The **User Details** screen displays for the user selected.
From this Details screen, you can modify the parameters associated with this service user:

- **Resources** section: Define the details associated with this service user
  - [Disable] button: Use this feature to disable a mailbox for a service user that is no longer with your company, or to temporarily suspend the login access to this mailbox.
  - [Delete] button: Use this feature to remove this service user from your account.
  - [Edit] button: Use this feature to edit the Display Name, Login, etc. of this service user.
  - [Change Password] button: Use this feature to change the login password for this service user. (See Log into the System for password requirement details.)
- **Services** section: Displays all services currently assigned to this service user.

2) Click the [Edit] button to change the user’s **Display name** and **Login**. The Services screen displays.

- Select the **Contact Info** tab to edit the user’s personal, address, phones, and organization information.
- Select the **Password Expiration** tab to edit the user’s password expiration parameters.
- Select the **Exchange** tab to edit or delete the user’s mailbox.
All Resource Usage

To allow you to properly manage your account’s hosted 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.

1) To view this table from the Control Panel, click the All Resource Usage shortcut from Service Information section of the main dashboard. The Resource Usage screen displays a list that details the status of each resource in your account.

![Resource Usage Table]

2) Review this table to help you manage your account resources.

- Access the Store section of the main dashboard to purchase additional resources, or downgrade resources, as needed.
Manage Your Account

The Hosting Services Control Panel enables you to manage, upgrade, and add services and resources, manage administrative users, and manage payment methods and financial documents through the Account feature.

Update Account Contacts

1) Log into the Control Panel and access the Account dashboard by selecting the Account tab from the menu bar. The Account dashboard displays.

2) Select Account Settings from the Account dashboard.
General account information, as well as the primary administrative contact displays.

3) Click the [Edit Account Settings] button to change the Billing, Technical, or Administrative contacts for your company.

**NOTE:** These users are available at no extra cost, and there is no need for purchasing additional resources for this feature.

The **Edit Account Settings** screen displays.

4) Scroll down to edit each contact as needed and click the [Save] button.

**Add or Delete Administrator Users**

1) Log into the Control Panel and select the **Admins** shortcut from the **Account** section of the main dashboard. The list of current admins for the account displays.
2) To add a new admin, click the [Add New Admin] button. The first screen of the Add New User wizard displays.

- If an admin has left your company you can disable them by clicking the admin’s Name and then the [Disable User] button on the Admin Details screen.

**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.

3) Enter the details for this user and click the [Next>>] button. The second screen of the Add New User wizard displays.

4) Select the nature of the subscriptions that this user can manage and click the [Finish] button. The Admins list displays.
5) Click the Name of an admin to access the Admin Details screen, where you can edit the admin’s information and parameters.

Manage Notifications
The Manage Notifications 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 Account tab in the menu bar.

2) Select Account Settings.
   The Account Settings screen displays:

3) Click the [Manage Notifications] button.
   The How to notify me screen displays:
4) All of the various notification events are defined under the **Types of Messages** column. You may click any of these notification message hyperlinks to view, and edit, the details of the notification method.

Under the **Send HTML** column, notice Send and/or **Do not send** hyperlinks.

Click either link to access the **Message format** screen:

![Message format screen](image)

Select the type of notification(s) you prefer and click **[Save]**.

The **How to notify me** screen updates to display your choice(s).

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**Subscription Management**

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

1) To access the subscription management features of the Control Panel, select **Account** from the menu bar. The **Account** dashboard displays.
2) Select **Subscriptions** from the **Account** dashboard. The **Subscription Management** screen displays:

3) Click any of the links describing the subscriptions listed under the **Subscription Name** column to view and edit the subscription details.

- Select any of the menu options from the left-side navigation pane to access each feature of the subscription management function.

**Cancel Subscription**

If you wish to cancel your hosted service so that you are no longer billed for our services, you may do so by cancelling subscriptions via the **Subscription Management** options.

**NOTE:** 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 hosted services infrastructure for the cancelled subscription(s).
1) Log into the Control Panel, and access the **Account | Account Settings | Subscription Management** as described above.

The **Subscription Management** screen (above) displays a list of all of your subscriptions with your hosted services provider.

2) Click any of the hyperlinks for a listed subscription under the **Subscription Name** column in order to access the details of the subscription selected.

   - Note that you can cancel one subscription without affecting your other hosting services/subscriptions.

The **Subscription Details** screen for the selected subscription displays:

![Subscription Details](image)

3) Click the **[Cancel Subscription]** button to begin the process of cancelling the selected subscription and ending billing for this service. The screen changes to enable you to enter comments.

4) You must enter something in the **Comment** input field and then click the **[Place Cancellation Order]** button to finalize the cancellation of the selected subscription. A confirmation message displays to verify the cancellation of the subscription service.
**Expired Subscriptions**

To check to see if any of your subscriptions are expired, or close to expired, access main **Account** dashboard, then **Account Settings | Subscription Management** as described above.

The **Subscription Management** screen each subscription’s **Start Date, Expiration Date**, and the **Status** of the subscription:

In the event that a subscription is expiring soon, and you wish to renew it, you may do so through the Control Panel (see **Renew Subscription** below for more information).

**Renew Subscription**

If the **Expiration Date** indicates that your account has a subscription that is expiring soon, your best option to ensure that you maintain your hosted services is to access the **Renew Subscription** menu to avoid lapses in your hosted services.

1) Log into the Control Panel, and access **Account | Account Settings | Subscription Management** as described above.

   The **Subscription Management** screen (above) displays a list of all of your subscriptions with your hosted services provider.

2) Select a subscription to renew and click its **Subscription Name** link.

   The **Subscription Details** screen for the selected subscription displays.
3) Click the [Renew Subscription] button. The first screen of the Subscription Renewal wizard displays.

4) Click the radio button in front of the desired subscription to be renewed and click the [Next] button.

   - To end this function, click the [Cancel] button and return to the Subscription Details screen.

The second screen of the Subscription Renewal wizard, the Confirm Order screen, displays.

5) Review the details of your subscription renewal and click the [Place Order] button.

   - **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 hosted services that you wish to associate with a customer owned domain.

1) Log into the Control Panel, and access the **Account** dashboard from the main menu.

2) **Select Buy More Services** from the options offered. The first screen of the **Buy More Services** wizard displays.
3) Click the radio button in front of the desired subscription category to be purchased and click the [Next] button.

   - To end this function, click the [Cancel] button and return to the Account dashboard.

The next screen in the Buy More Services wizard, Choose Service Plan, displays. Subscription services associated with the previously selected category are listed.

4) Click the radio button in front of the desired service plan to be purchased and click the [Next] button. The next screen in the Buy More Services wizard, Choose Period, displays.

5) You may purchase subscriptions on a monthly or yearly basis. The yearly option represents a significant discount off the monthly service pricing.

   Click the radio button in front of the desired subscription period and click the [Next] button.

   *(Optional)* The Domain Name screen displays so that you may associate a domain name to the subscription being purchased. This screen displays if the subscription being ordered needs to be associated with a domain name. If so, enter a domain associated with your account and click the [Next] button.

   The final screen of the Buy More Services wizard, the Confirm Order screen, displays so that you may
review the details of this subscription purchase prior to placing your order.

6) Click the [Place Order] button to accept the “standard” subscription service and finalize this purchase. Your account is billed accordingly.

- You may also modify the subscription parameters by adding additional resources to the subscription selected.
  Click the [Order Additional Resources] button to modify the subscription selected, which starts the Upgrade Wizard procedures.

Buy Additional Resources
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 Account dashboard from the main menu.

2) Select the Buy Additional Resources option offered.
  The first screen of the Subscription Resource Upgrade wizard displays.
A list of your subscriptions displays under the **Subscription Name** column.

3) **Select the subscription for which you wish to purchase additional resources and click [Next].**

The next screen of the **Subscription Resource Upgrade** wizard, a list of all of the possible resources that may be selected to define the subscription, displays—these resources correspond 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).

4) **In the New Limit column beside the selected resource, enter the total number of units you would like to purchase.**
5) Click the [Next] button. The next screen in the Subscription Resource Upgrade wizard, the Confirm Order screen, displays.

6) Review your order and click the [Place Order] button to accept the resources and finalize this purchase. Your account is billed accordingly.
Financial Documents

The Financial Documents features are used to update, or modify, your billing information so that your account remains in good standing.

1) Log into the Control Panel, and access the Account dashboard from the main menu.

2) Select Financial Documents from the Account dashboard.

The Financial Documents screen provides access to your account information.

Below is a description of the tabs that populate the Financial Documents screen:

Unpaid Orders & Invoices
The Unpaid Orders & Invoices feature displays an itemized list of unpaid bills. You may click any of the invoice links to display the detail associated with each invoice.

Open & Pending Orders
The Open & Pending Orders feature displays an itemized list of all unprocessed orders associated with your account. You may click any of the unprocessed order links to display the detail associated with it.
Invoices & Payments History
The **Invoices & Payments History** feature displays a list of all invoices and payments associated with your account (voided, closed, etc.). You may click any of the invoices or payments to view details.

Orders History
The **Orders History** feature displays a list of all orders associated with your account (renewals, sales, upgrades, etc.). You may click any of the orders to view details.

Payment Methods

Add a Credit Card
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 **Account** dashboard from the main menu.

2) Select **Payment Methods** from the **Account** dashboard. The **Payment Methods** screen displays.
You may add either “credit card” or “bank account” details to the list of available payment methods used to manage your account.

3) To add a new credit card, click the [Add Credit or Debit Card] button. The first screen of the **New Credit Card** wizard displays.

4) Enter information as needed to complete each field and click the [Save] button at the bottom of the screen in order to add this new credit card information to your payment method options.

   • You may click the [Cancel] button to end this process without making any changes and return to the **Payment Methods** screen.