RIBBON CONNECT FOR MS TEAMS

Ribbon Connect Portal
Quick Reference Guide
Ribbon Employees: Setting Up Distributor Accounts

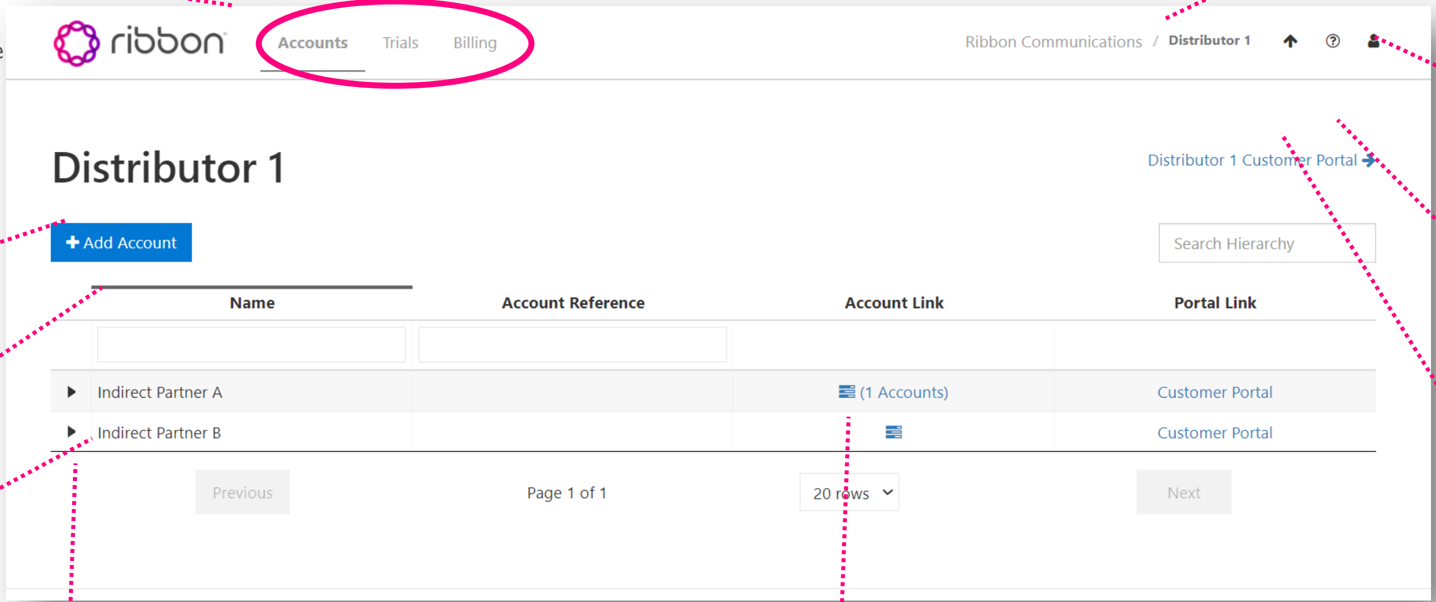
Distributor/ Universal Partner: Account Management Navigation

Top Navigation Menu: The top Navigation bar provides quick access to Accounts, Trials and Billing information related to the Partners and/or customers set up under your account.
Simply click the tab of choice to navigate directly to the area of interest.

Distributor Name: The distributor or Universal Partner Name appears at the top left of the page.

Add Account: Click the Blue Add Account button to set up a new Indirect Partner.

Indirect Partners: Each of the partners added will appear beneath the distributor name.



Account/Sub-Accounts/Account Breadcrumbs: Reference the breadcrumbs to determine the account level you are accessing. Click on a level to navigate directly to an account in the hierarchy

Avatar: Links you directly to your account profile. This link allows you to switch accounts or logout of the portal.

Support Link: The support link provides quick access to support tools.

Back/Up Arrow: Switch between the global address book and the personal address book.

Expand Arrow: Click the expand arrow to view a summary of partner information.
Details specific to the partner will appear below.
Refer to the View or Update Existing Partner Section for details

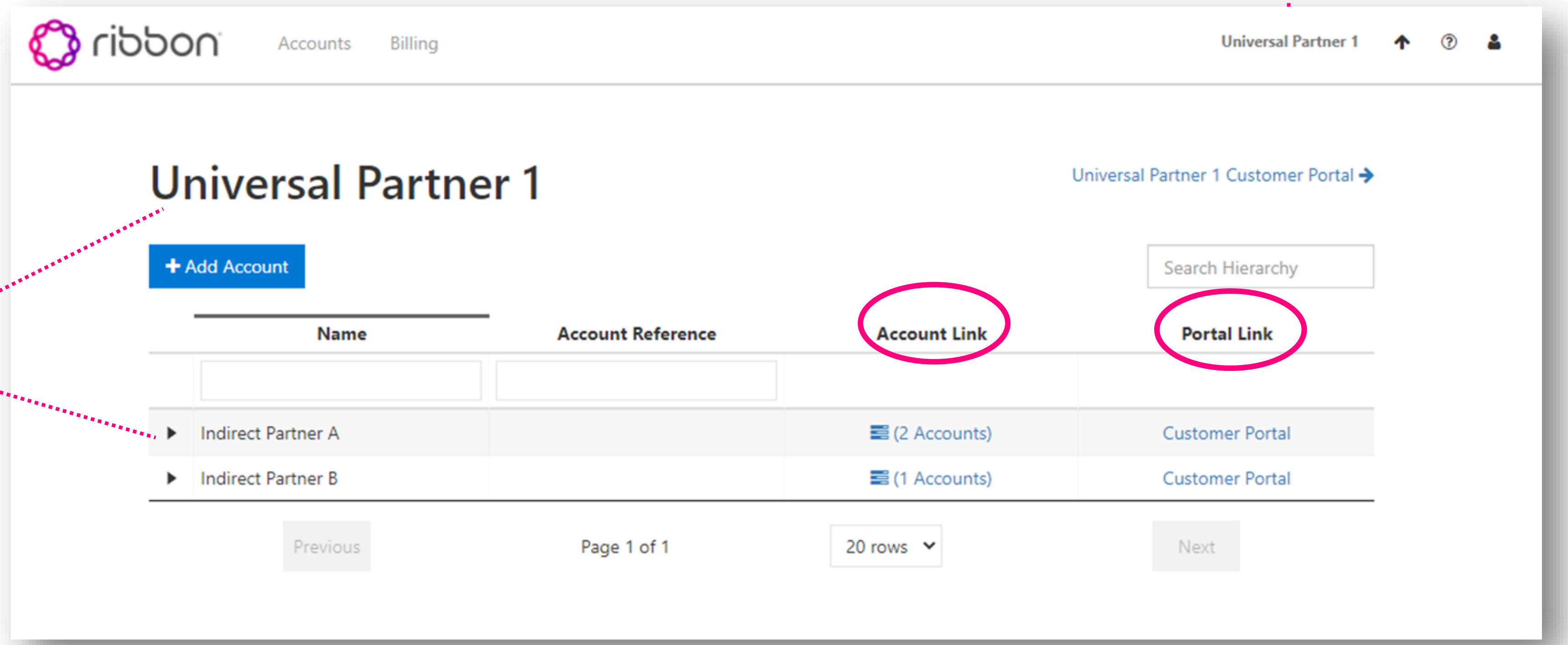
ACCOUNT link: To View the customer accounts for a specific partner, click the blue account hyperlink provided.

Customer Portal: To access the Customer Portal for a specific partner or customer, Click the blue link provided on the row that correlates with the partner or customer of interest.

Universal Partner: Account Management Initial Login View

Portal Level: The breadcrumbs at the top right of the screen indicate the level being viewed.

Indirect Partner List: From the Universal Partner Level, a List of Indirect Partners are displayed



Universal Partner: Account Management: Creating Administrative User Account

Administrator Users: The initial administrative User can set up additional administrative by selecting the Administrative Users Tab.

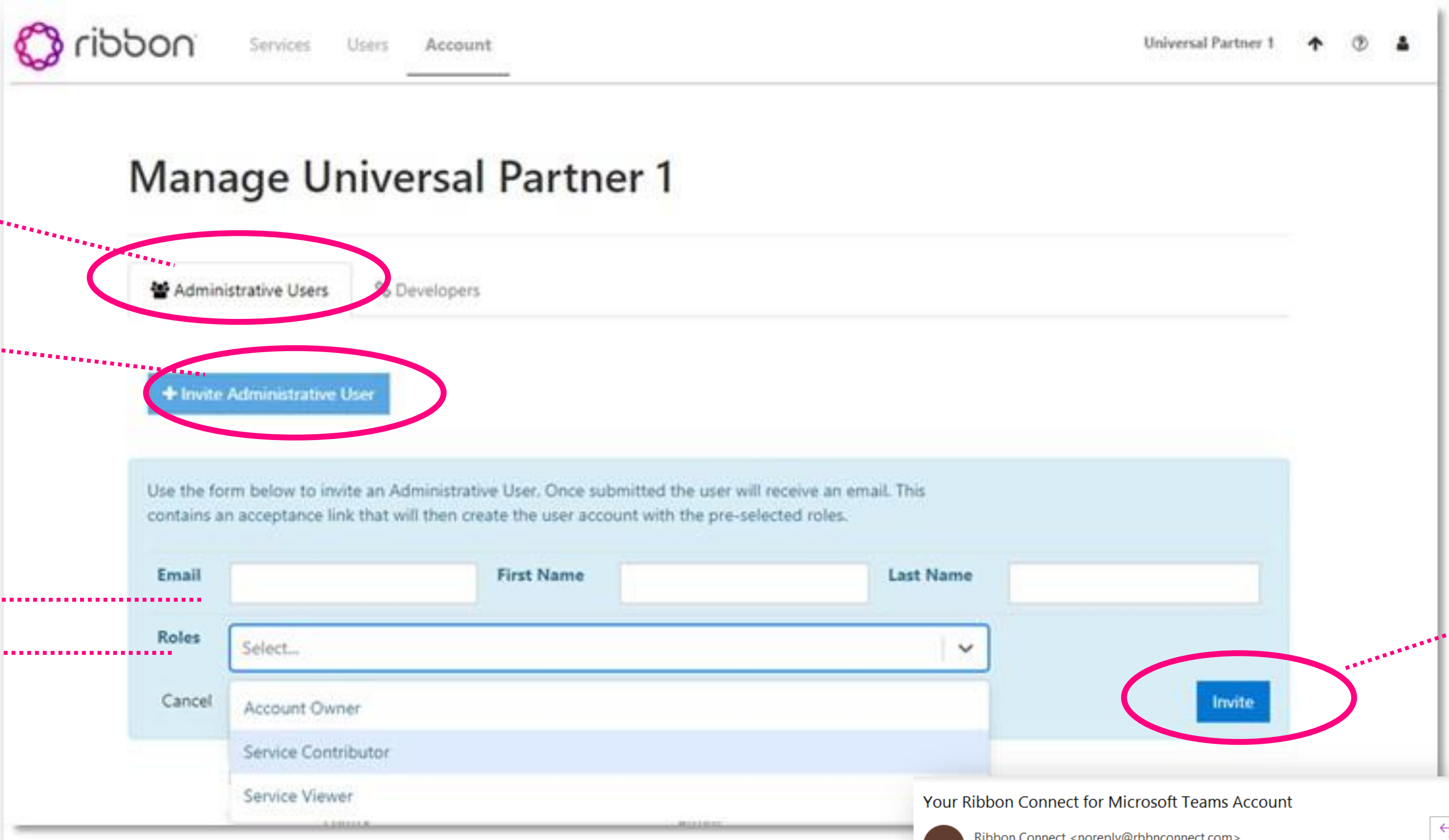
Invite Administrator Users: Click the blue Invite administrative user button.

Complete the fields listed in the form provided:

- Email
- First Name
- Last Name

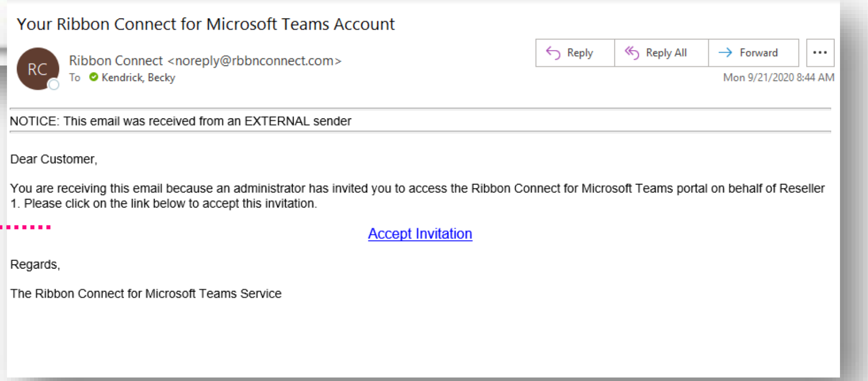
Role: Select the role from the drop –down menu provided *:

- Account Owner
- Service Contributor
- Service Viewer



Invite: Click the blue Invite button.

Email Invite: An email is sent to the User with instructions and link on how to access portal.



***Important Note:** Any Account Owner or Service Contributor roles created are required to be an Authorized Purchaser as per the Ribbon Cloud Subscription Agreement terms and conditions.

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Universal Partner: Adding an Indirect Partner Account

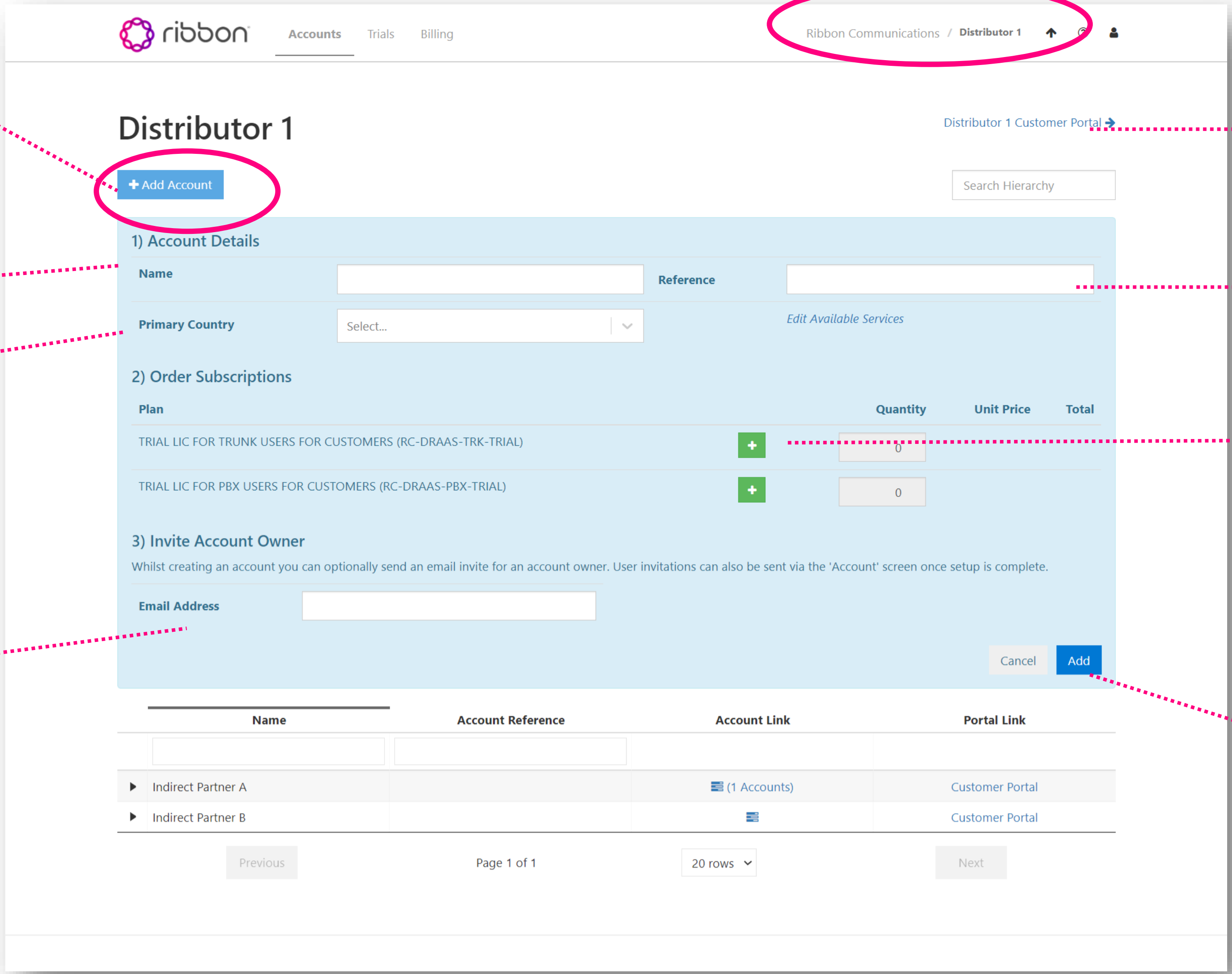
Adding and Indirect Partner Account: Click the blue **Add Account** button located at the top left of the page.

Complete the fields listed in the form provided:

Name: Indirect Partner Name
Reference: Your internal or CRM reference for the Indirect Partner company

Country: The location of the Indirect Partner operation HQ

Email Address: The email address of the Indirect Partner administrator



Portal Level: The breadcrumbs at the top right of the screen indicate the level being viewed.

Customer Portal Shortcut: Click the blue customer portal link to navigate directly to the customer portal to begin service configuration

Reference: Your internal or CRM reference for the Indirect Partner company

Add Button: Click the green button to adjust the quantity field.

Note: The Unit price and Total is only viewable by the Account Owner.

Add: Click the blue "Add" button to process the order.

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Universal Partner/Direct Partner: Creating a Customer

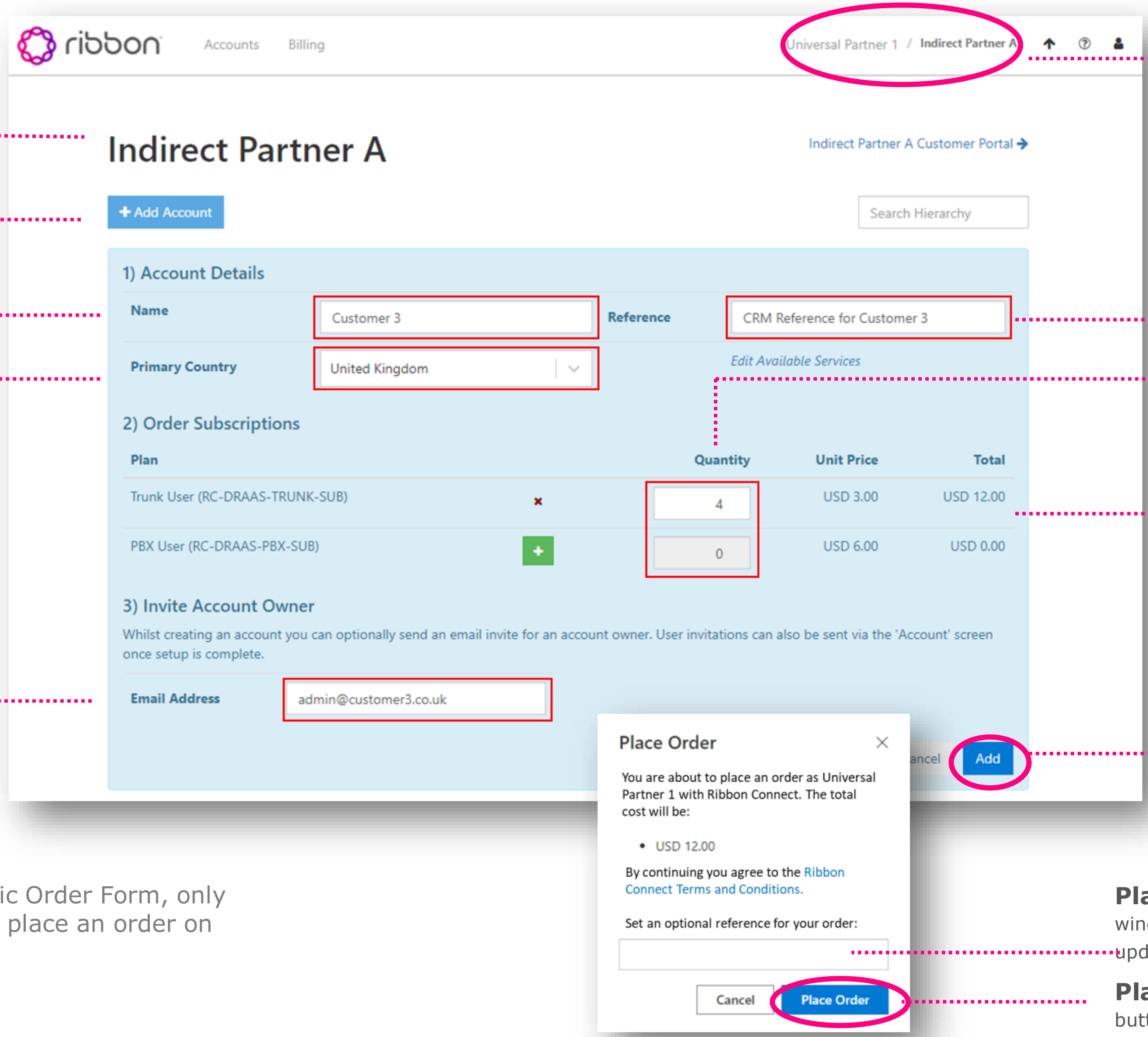
Creating a Customer: Click the Add Account button. And a form will appear. Complete the fields in the form as detailed below.

Account: Click the Add Account button and a form will appear. Complete the fields in the form as detailed below.

Name: Customer Name

Country: The location of the Customer

Email Address: The email address of the Customer administrator



TIP: The breadcrumbs indicate the customer is set up under Indirect Partner A. This can be used to validate the customer is being added to the right level

Reference: Your internal or CRM reference for the order

Quantity The quantity of the required subscriptions

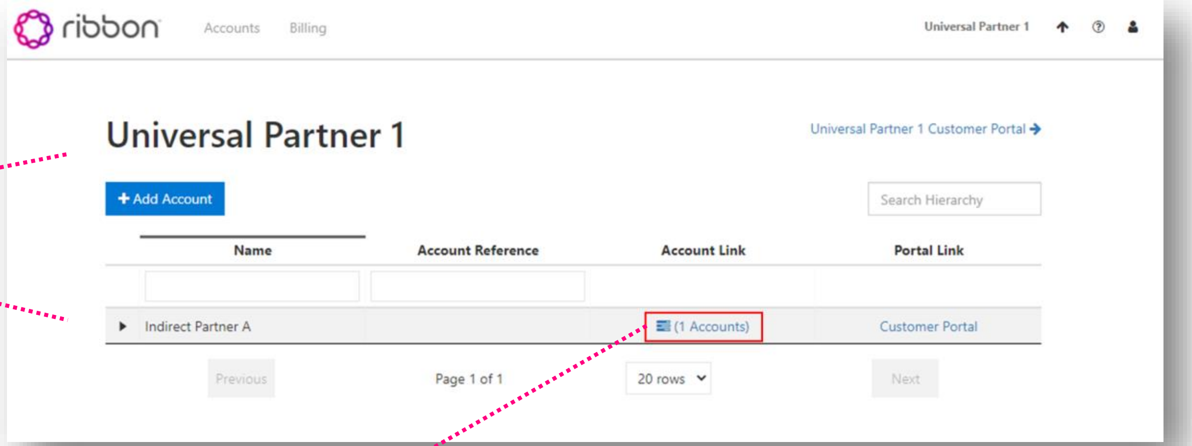
Unit Price and Total Cost: These fields are displayed at the Universal Partner view and not displayed on the Partner or Customer View.

Add: Click the blue Add button to complete order setup.

Place Order Confirmation: A confirmation window will appear to confirm order. Review details, update optional order reference field.

Place Order: Click the Place Order button to complete order setup.

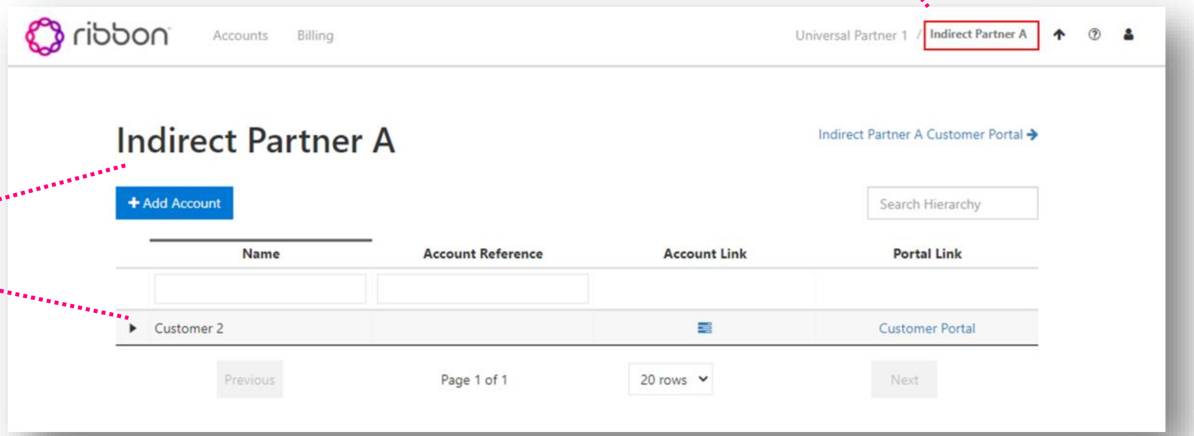
Note: This is the Ribbon electronic Order Form, only authorised users should be able to place an order on behalf of an Account



Indirect Partner: From the top-level view, locate the Indirect Partner in the list and select the Account link associated with the Indirect Partner.

Account Link: Click the Account Link to navigate to the customer level.

Tip: The Breadcrumbs in the top right show the portal is at the Indirect Partner's Level



Indirect Partner View: The customers for the Indirect Partner will be viewable at this level. Click the Portal Link to view users.

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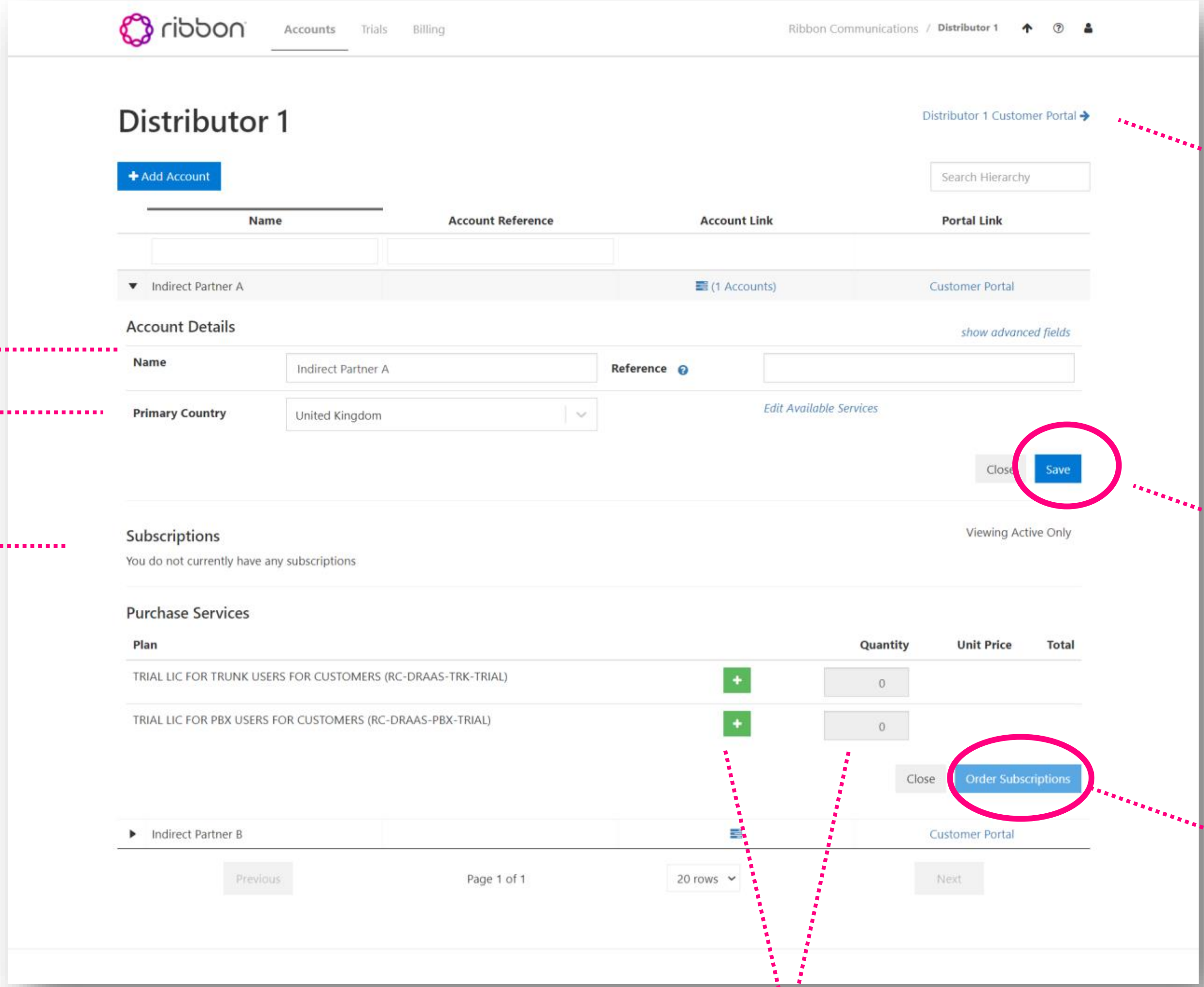
Distributor/ View or Update Existing Partner Account Details

Partner Name: The Partner Name appears and can be updated in the field provided.

Primary Country: View and update the primary country previously entered

Subscriptions: A list of current active subscriptions will be summarized here



Customer Portal Link: Once the service order has been completed, click the Blue link provided to navigate to the customer portal

Save: Click the blue Save button to save any updates you made on this page.

Order Subscription: Once the quantity has been entered, click the blue order subscription button to process services order.

Purchase Services: To add services to this account, click the green plus sign and update the quantity field.

The Indirect Partner may from time to time wish to increase or decrease the Customer's subscriptions, to achieve this:

Validate Level: Double-check the level based on breadcrumbs

Select Partner: Navigate to the Indirect Partner Level of interest.

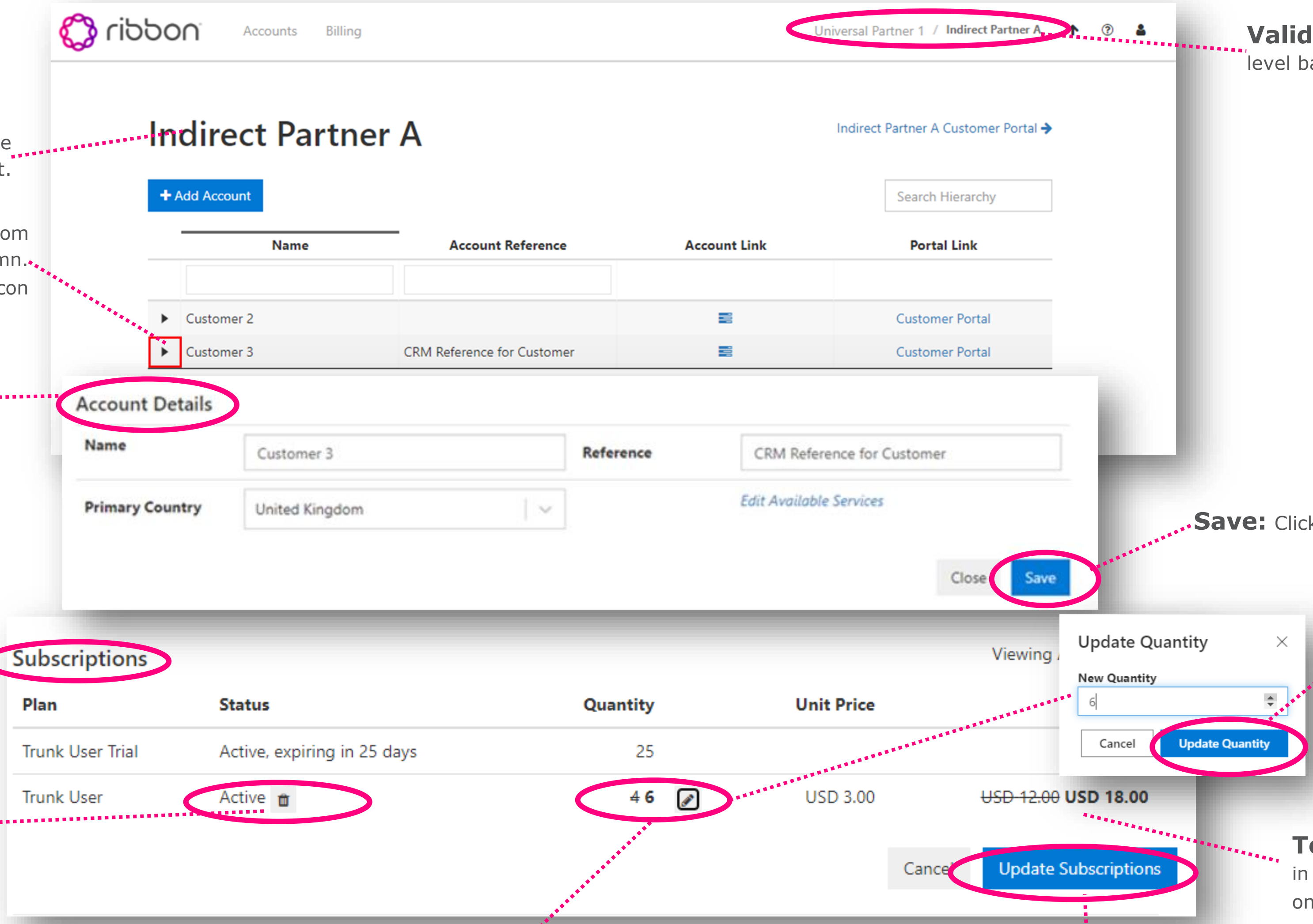
Customer: Select customer from the list provided in name column. Click the arrow (expand) icon

Account Details: View and/or update fields provided.

Save: Click the SAVE button.

Subscriptions: Scroll down to the Subscription section. From here you can select a service under the plan column.

Update Quantity: an Update Quantity menu will appear once the edit Icon is selected. Update the quantity in the field provided and click the Update Quantity Button to complete.



Cancel Service: Select the Delete Icon to cancel the subscription.

Total Field: The amount displayed in the Total Amount Field will update once the update Quantity is complete.

Update Service: Click the Edit Icon to update the subscription. An Update Quantity menu will appear once this is selected.

Update Subscription: Click the Update Subscription button to finalize the service subscription update.

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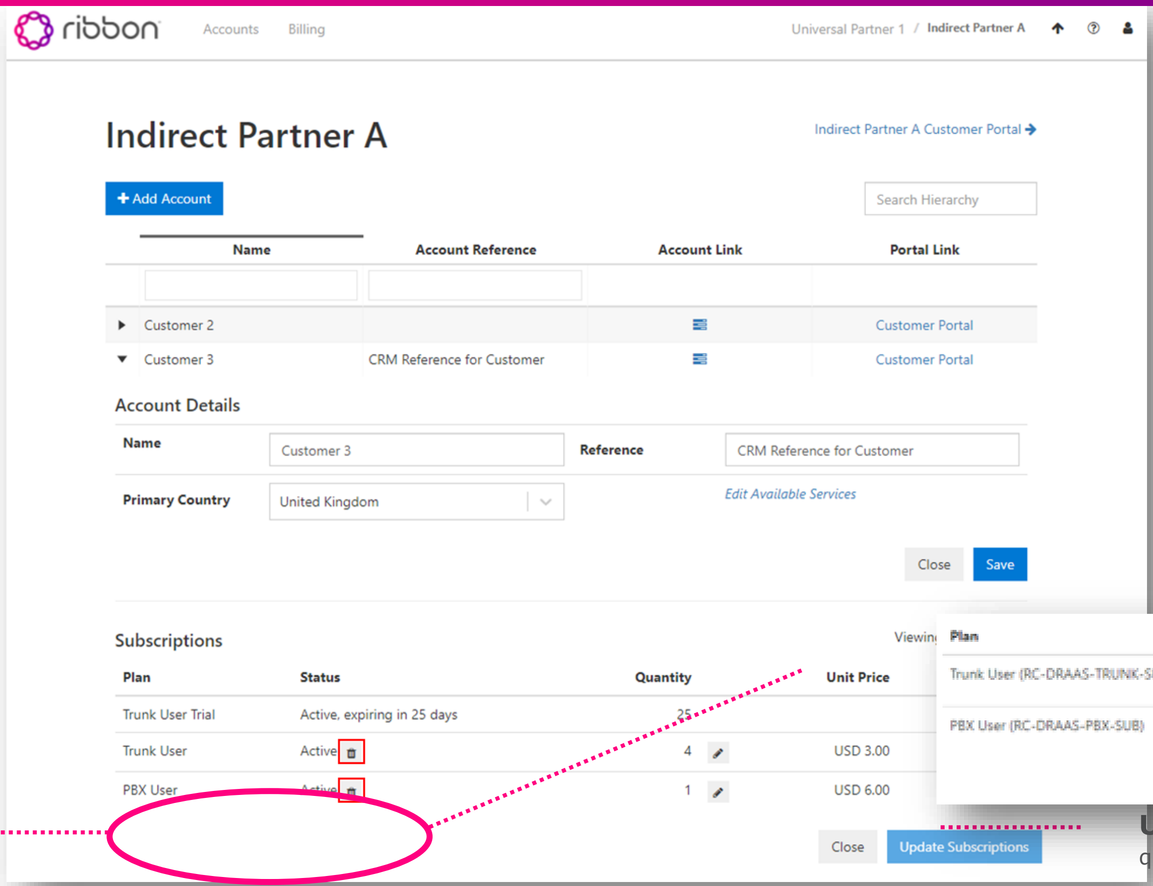
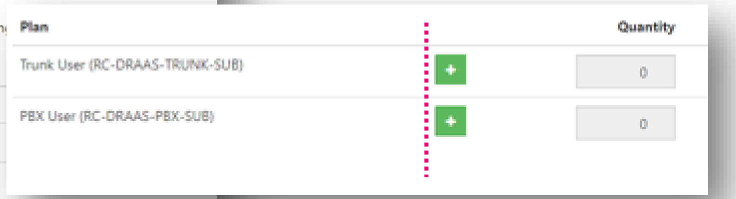
Universal/Direct Partner: Deleting a Customer

Access the Active subscriptions: Navigate to the appropriate customer or partner.





View Subscriptions: Navigate to the Subscription section and click the Delete icon for any active services.

Update Quantity: Update the quantity for all active services to "0"

Update Subscriptions: Click the Updated Subscription button once all active services quantities are set to "0".

Note: There is no explicit delete function for the Customer or Indirect partner. The portal will automatically remove Customer and associated data 14 days after there are no active subscriptions.