

Hands on Guide to C3

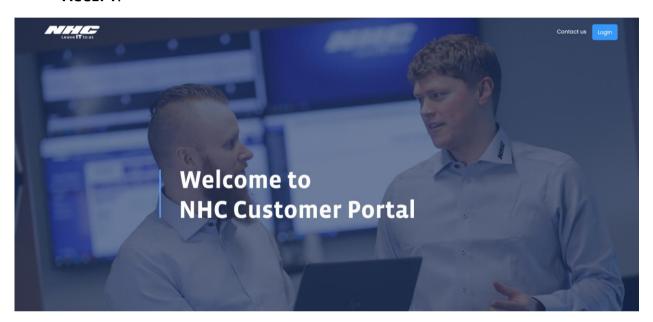
Table of Contents

Login to C3	2
Dashboard	2
Subscription Management	3
Shop (To purchase New Subscriptions)	3
Order	6
Products (To manage existing subscriptions)	6
User Management	8
Add Single user	9
Add Multiple Users	10
Assign/Revoke License from Users	11
Grant Customer Admin/Reader Access to Users	12
Invoices	13
Create new usage based /Azure subscriptions	15
Add users and assign roles to user	18
Azure Estimates for a subscription	18
Azure Billing for an Azure subscription	19
Azure Estimates	20
Azure Billing Report	21
License Consumption report	22
Manage Profile	23
Reports	24



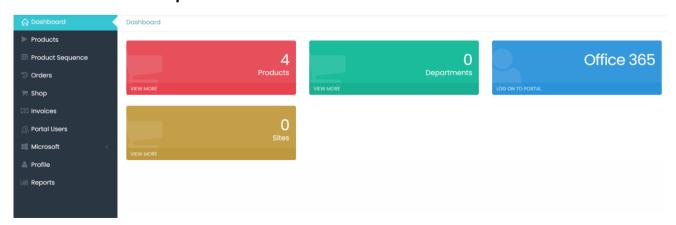
Login to C₃

- Access your C3 portal with the provided C3 URL
- Click on **Login** button at the top right corner of the welcome page
- Provide your **office 365 work account** credentials to login to the portal
- On your first login, you will have to agree to the **terms and conditions.** Check mark the box corresponding to **I have read the terms and conditions** and then click on **ACCEPT**.



Dashboard

- User lands on **Dashboard** seeing 3 tiles
 - o **Products**: Consists currently subscribed products
 - o Office 365: Quick Link to O365 Admin Portals
 - o Site & Departments: If created



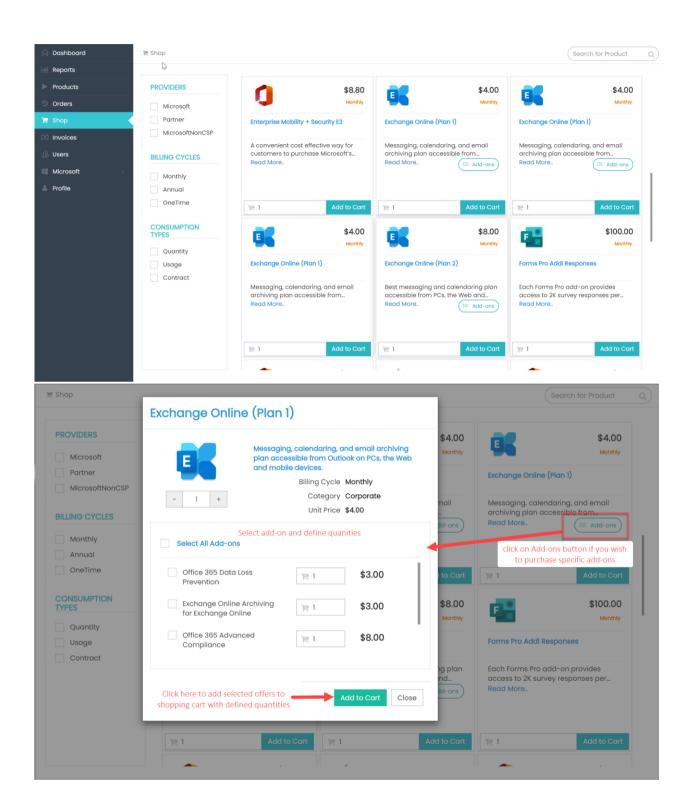


Subscription Management

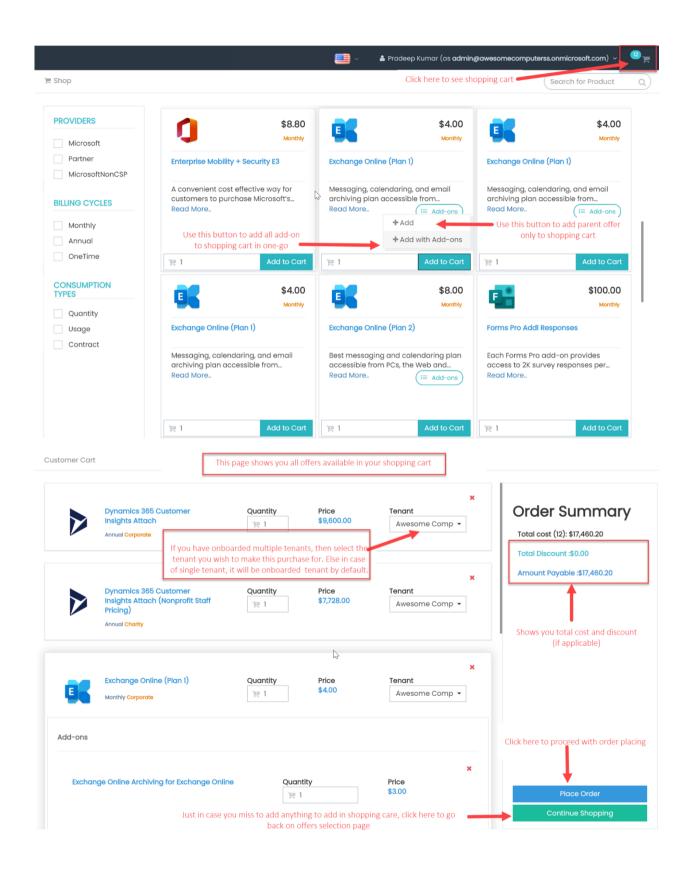
Shop (To purchase New Subscriptions)

- Click on **Shop** menu item from the left menu bar to see all offers which are part of customer's plan
- Each offer tile will consist following information
 - Unit price
 - Offer billing cycle (Monthly/Annual/One time)
 - Add-on button if having any add-on applicable and added by partner in plan (Click on it to define quantities for parent offer and add-on in separate tile followed by clicking on Add to Cart button to add the offers to shopping cart
- Click on Add to Cart button to add the offer to cart of purchase, it will be added if doesn't have any applicable add-on. But in case of add-on, you'll see two option as follow:
 - o +Add: use this option to add only parent offer to shopping cart
 - +Add with Add-ons: use this option to purchase all add-on in one go along with parent offer
- Click on **Shopping Cart** button on top right corner to see offers in cart and **Order** Summary
- Order summary shows you following details
 - Offer name
 - Quantity: update the number and click on Apply (if you wish to update quantity)
 - Tenant name: By default, here you see the tenant name that offer is purchased for. Just in case multiple tenant are onboarded, you can select the tenant you wish to purchase subscription against with
 - o total amount to be paid and discount (if applicable)
- Click on Place order button if you are good to purchase offers available in shopping cart. In case, you missed something to add to cart then click on Continue Shopping to land on offer selection page.





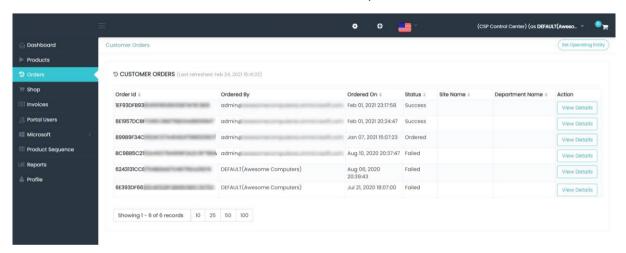






Order

- Click on Orders menu item from the left menu bar. This page shows you order details such as
 - o Order Id
 - o Ordered By
 - o Ordered on (Date & Time)
 - o Status: order of status like success/in progress/ failed
 - Site Name (If applicable)
 - Department Name (If applicable)
 - Actions: See details of the order's components

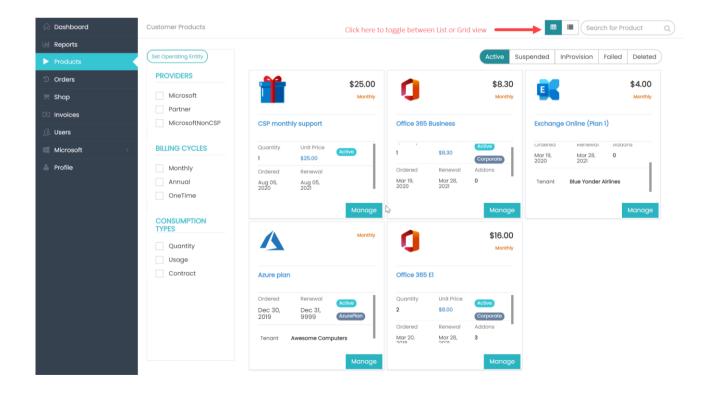


Products (To manage existing subscriptions)

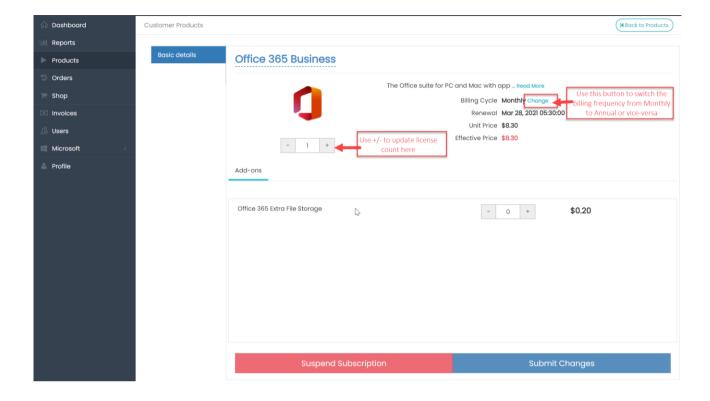
- Click on **Products** menu item from the left menu bar to see all existing subscriptions in Tiles or List view (you can switch to view as per your wish)
- You can filter offers here on various dimension
 - Providers
 - Microsoft
 - Partner
 - Category
 - Corporate/Academic/Charity/Government
 - Billing Cycles
 - Monthly/Annual/One time
 - Consumption Types:
 - Quantity based: license based generally
 - Consumptions: Azure subscription or Azure Plan
 - Contract Offer
 - Subscription Status



- Active/Suspended/In provision/Failed/Deleted
- Each tile will consist following details per subscription
 - Subscription Name
 - Total current cost for that subscription
 - Quantity
 - Unit Price
 - o Offer Category: Corporate/Academic/Charity/Government
 - Current Status: Active or Suspended
 - Ordered Date: Date when subscription was purchase first time
 - Renewal Date: Date of subscription renewal
 - Tenant Name: Tenant that subscription purchased for
 - o Site/Department Name: If applicable
- Click on Manage on the tile to manage the subscription
- Update the license count for parent, add-on (if purchased) as well switch the billing frequency (monthly to annual or vice versa) on this page, then click on **Submit** Changes to process it.
- Click on **Suspend Subscription** to suspend it

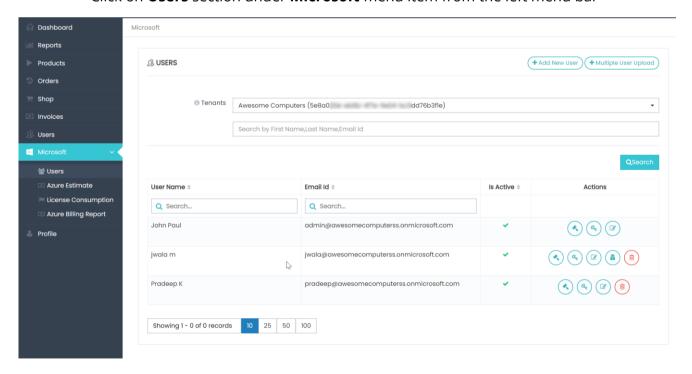






User Management

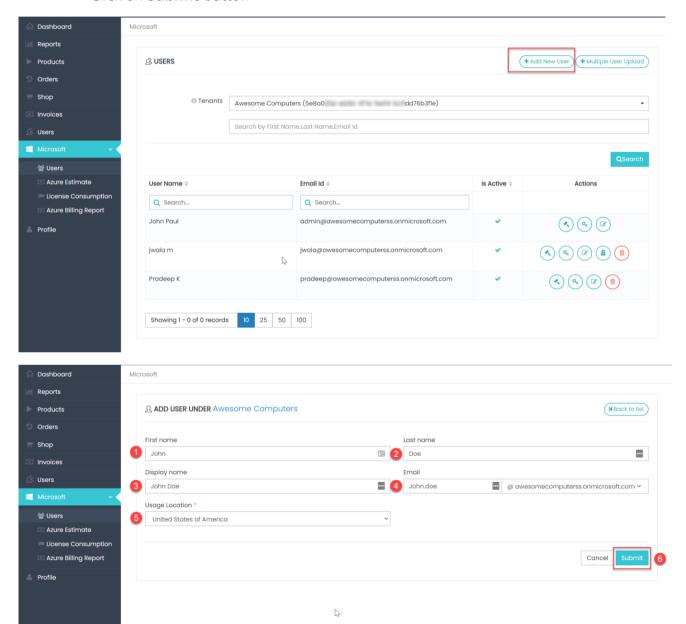
• Click on **Users** section under **Microsoft** menu item from the left menu bar





Add Single user

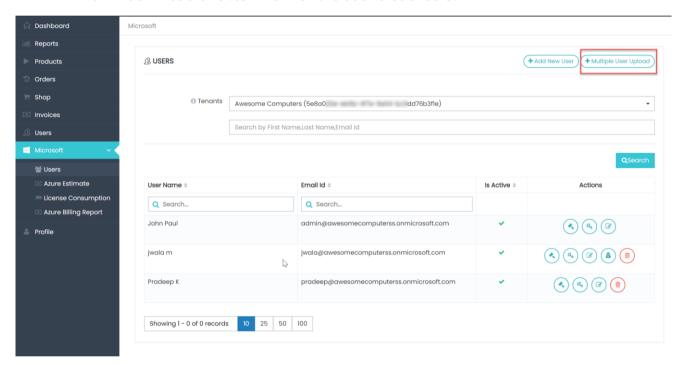
- Click on Add New User button
- Enter First Name, Last Name, Display Name and Email
- Select the Usage Location
- Click on **Submit** button



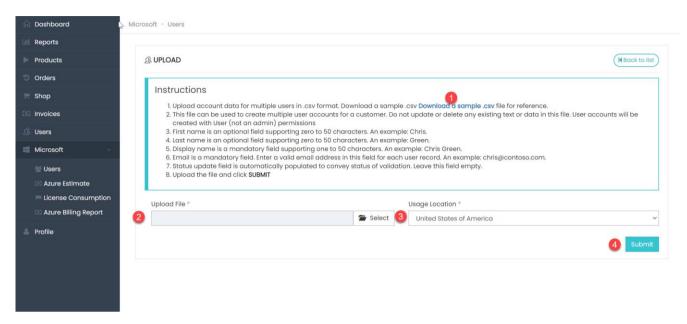


Add Multiple Users

- Click on **Multiple User Upload** button.
- Read the instructions and prepare the .csv file with user details.
- Click on **Select** button and upload the file.
- Select Usage Location and click on Submit
- It will take couple of minutes to create the users.
- After completing you can see the **Get Uploaded Users Details** button, click on it.
- It will download one .csv file with the user credentials.

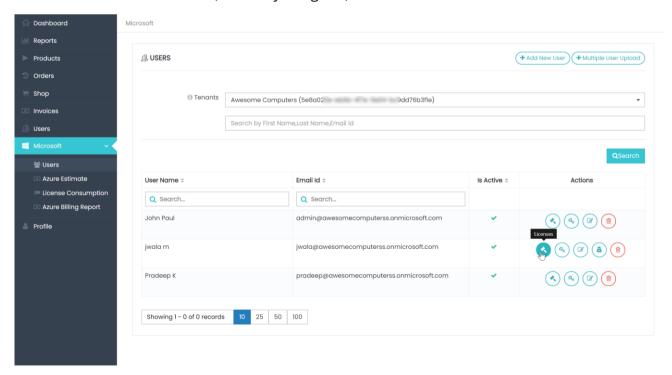




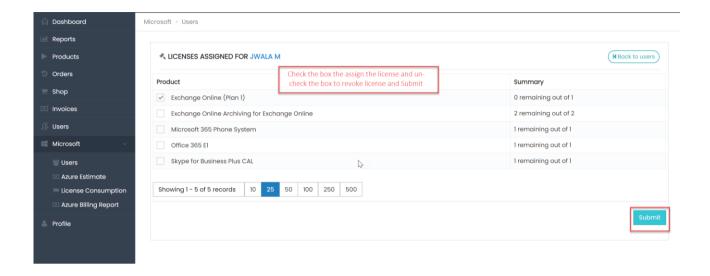


Assign/Revoke License from Users

- Click on User section under Microsoft menu item from the left menu bar
- Click on **Licenses** button in the Actions column of the desired user.
- You can see the available licenses and the usage summary.
- If no seats are remaining, then buy more licenses.
- Check the checkbox for license to assign it or uncheck the checkbox simply to revoke the license (if already assigned) and then click on **Submit** button.



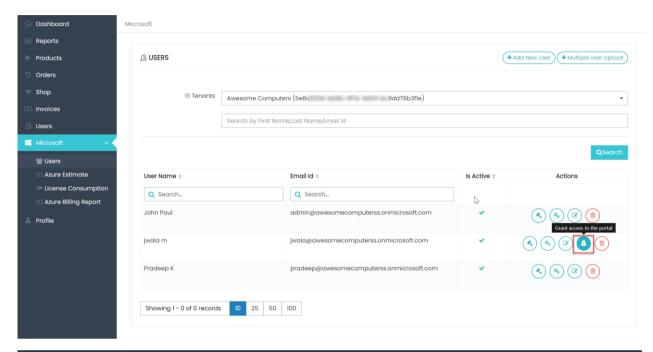


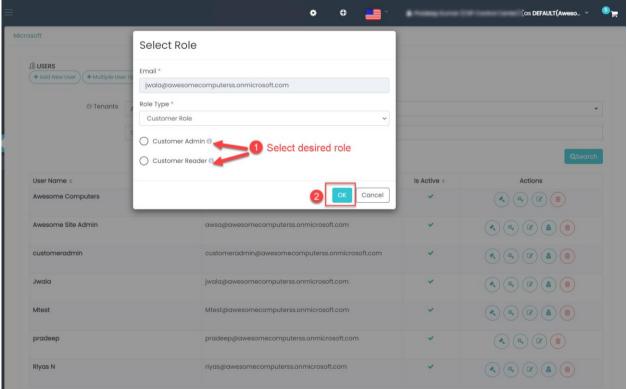


Grant Customer Admin/Reader Access to Users

- Click on User section under Microsoft menu item from the left menu bar
 - Click on **Grant access to the portal** button for the desired user
 - Select the **Customer Admin/Reader** role from the popup
 - Click on **Ok** button
 - If the email notification is set up, a welcome email would be sent out to the user that is granted access to the portal
 - From this point, user can login to customer portal as a customer admin/reader
 - On the first login to the portal they must accept the terms and conditions (Customizable)





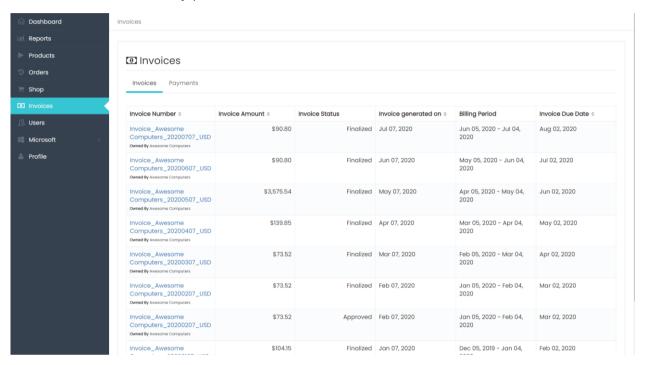


Invoices

Click on Invoice menu item from the left menu bar with two sections as follows



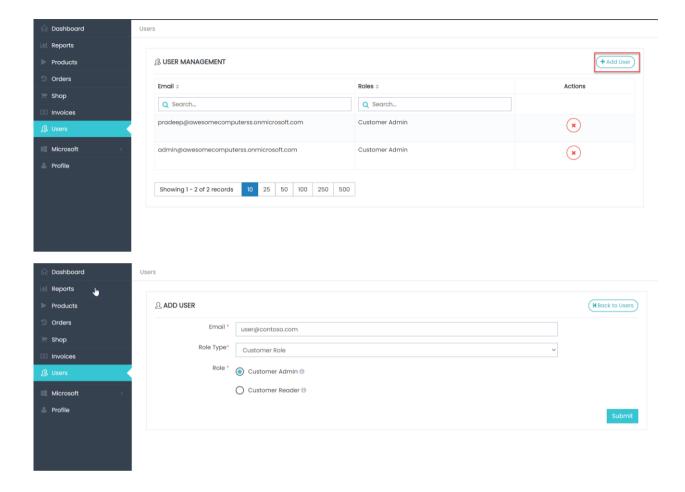
- o Invoice: It displays all customer invoice generated so far
- Payments: Any payment that were made by customers can be see here, if recorded by partner



Users

- Click on **Users** menu item from the left menu bar which will show you details such as email address, assigned role w.r.t user having customer portal access
- Clicking on **X** will remove the user access from portal
- Click on +Add User, provide necessary details like email address and desired role, click on Submit to finish the role assignment

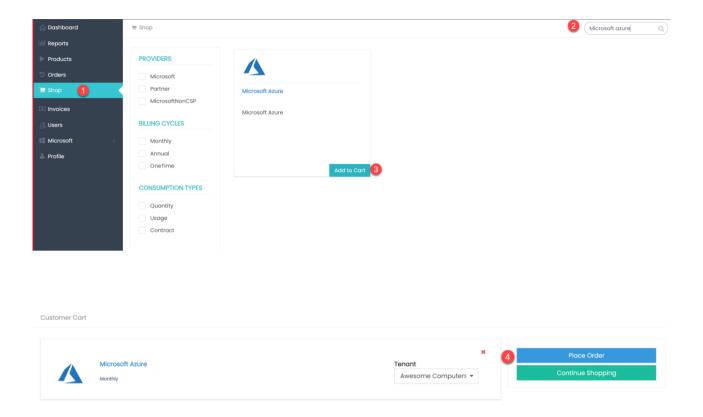




Create new usage based /Azure subscriptions

- Click on **Shop** menu item from the left menu bar to see all offers which are part of customer's plan
- Search for Microsoft Azure in the offer list and Click on Add to Cart once found
- Click on Place order button if you are good to purchase offers available in shopping cart. In case, you missed something to add to cart then click on Continue Shopping to land on offer selection page.
- Click on **Shopping Cart** button on top right corner to selected offer in cart and Order Summary
- Click on **Place Order** button if you are good to purchase it. Once purchased it will be available under Products sections and can be managed from there.

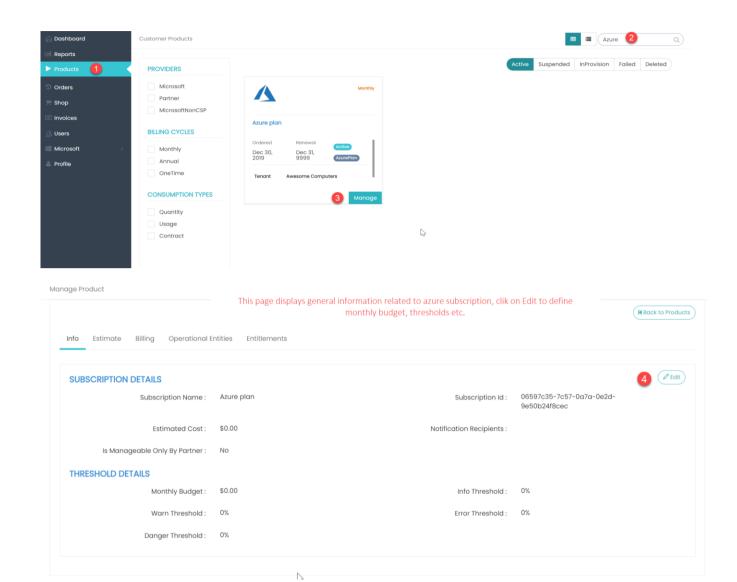




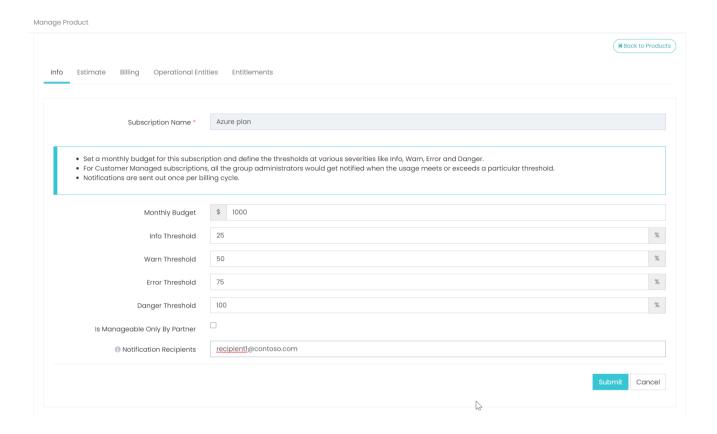
Manage Azure Subscription

- Click on **Products** menu item from the left menu bar and search for **Microsoft Azure/Azure Plan** (if purchased)
- Click on Manage
- Set a monthly budget for this subscription and define the thresholds at various severities like Info, Warn, Error and Danger
- If you want to hide this Azure subscription from **Product** listing in customer portal check the **Is Manageable only by partner** checkbox
- Enter the notification recipients email id, these recipients would get notified when the usage meets or exceeds a particular **threshold**
- Click on **Submit** button









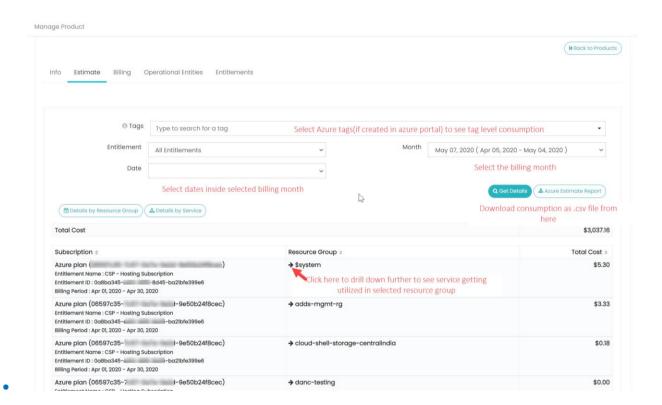
Add users and assign roles to user

- Click on **Products** menu item from the left menu bar and search for **Microsoft Azure/Azure Plan** (if purchased)
- Click on Manage and switch to user section where you'll be able to see permitted users along with permissions level
- Click on **Add User to Subscription** button
- Enter the user email (user need to present under the customer tenant) and select the desired role
- Click on **Submit** button

Azure Estimates for a subscription



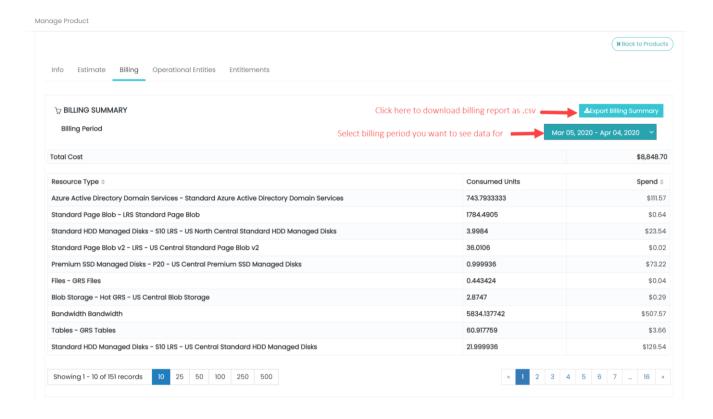
- Click on **Products** menu item from the left menu bar and search for **Microsoft Azure/Azure Plan** (if purchased)
- Click on Manage and switch to Azure Estimates section where you'll be able to Resource Group/ Services/Azure Tags level consumption updating on daily basis for a subscription which can be filtered upon subscription/billing period/date level



Azure Billing for an Azure subscription

- Click on **Products** menu item from the left menu bar and search for **Microsoft Azure/Azure Plan** (if purchased)
- Click on Manage and switch to Billing section where you'll be able to see billing data for subscriptions similar to provide by MS as Usage recon report at the end of billing period

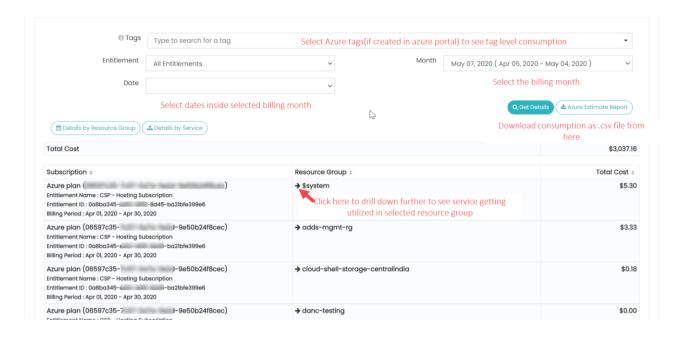




Azure Estimates

- Click on Azure Estimates section under Microsoft item from the left menu bar and you'll be able to see Azure Estimates report similar to what we see on Microsoft Azure management section under Products.
- This comes handy when you have multiple tenant onboarded and you want to see data on tenant level

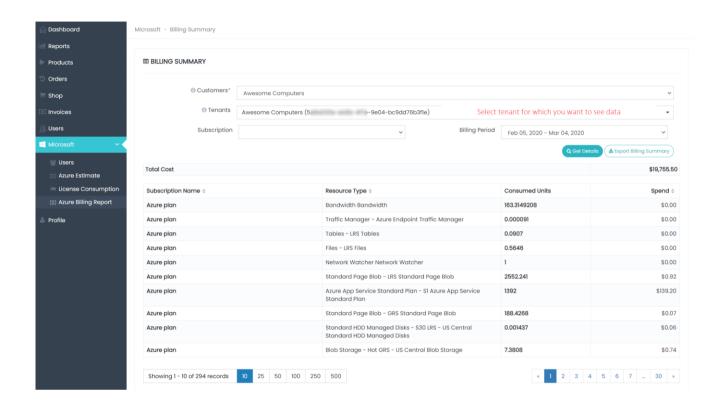




Azure Billing Report

- Click on Azure Billing section under Microsoft item from the left menu bar and you'll
 be able to see Azure Billing report similar to what we see on Microsoft Azure
 management section under Products.
- This comes handy when you have multiple tenant onboarded and you want to see data on tenant level

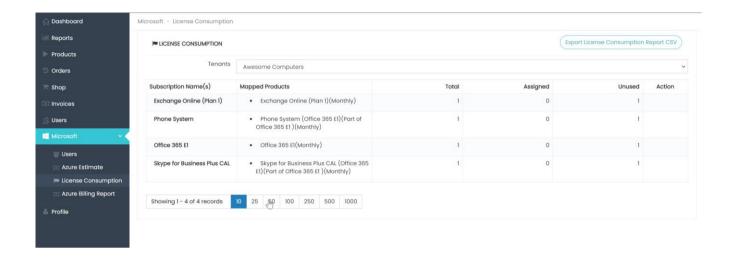




License Consumption report

 Click on License Consumption section under Microsoft item from the left menu bar and you'll be able to see utilization report for purchased licenses-based subscription, and if there are unassigned licenses, it can be released using Release Unused Seats button to optimize cost.

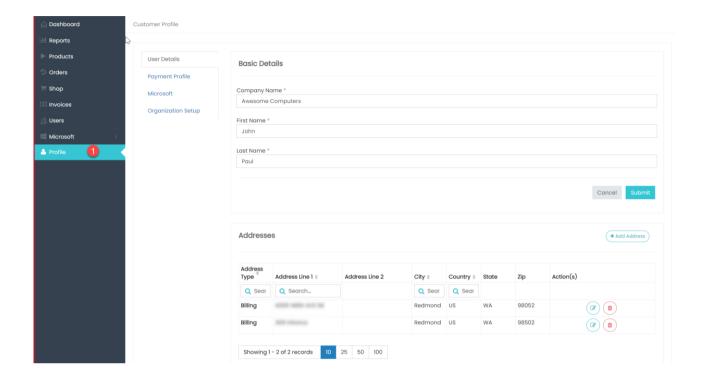




Manage Profile

- Click on **Profile** menu item from the left menu bar and you'll land on **User** Details section by default
- Review **Organizational details** here and update if required.
- On Payment Profile Section, customer can provide multiple payment method (CC/ACH based on support by payment gateway) and set one as default to be used for next payment run
- Under **Microsoft** section, customer can see their tenant details and MCA consent related information and update if required
- **Organization setup** section allow customer to create Site and Department in their tenant.





Reports

• Click on **Reports** section from left menu bar which will give you details such as order date, current status, quantity and expiry date on subscribed offers

