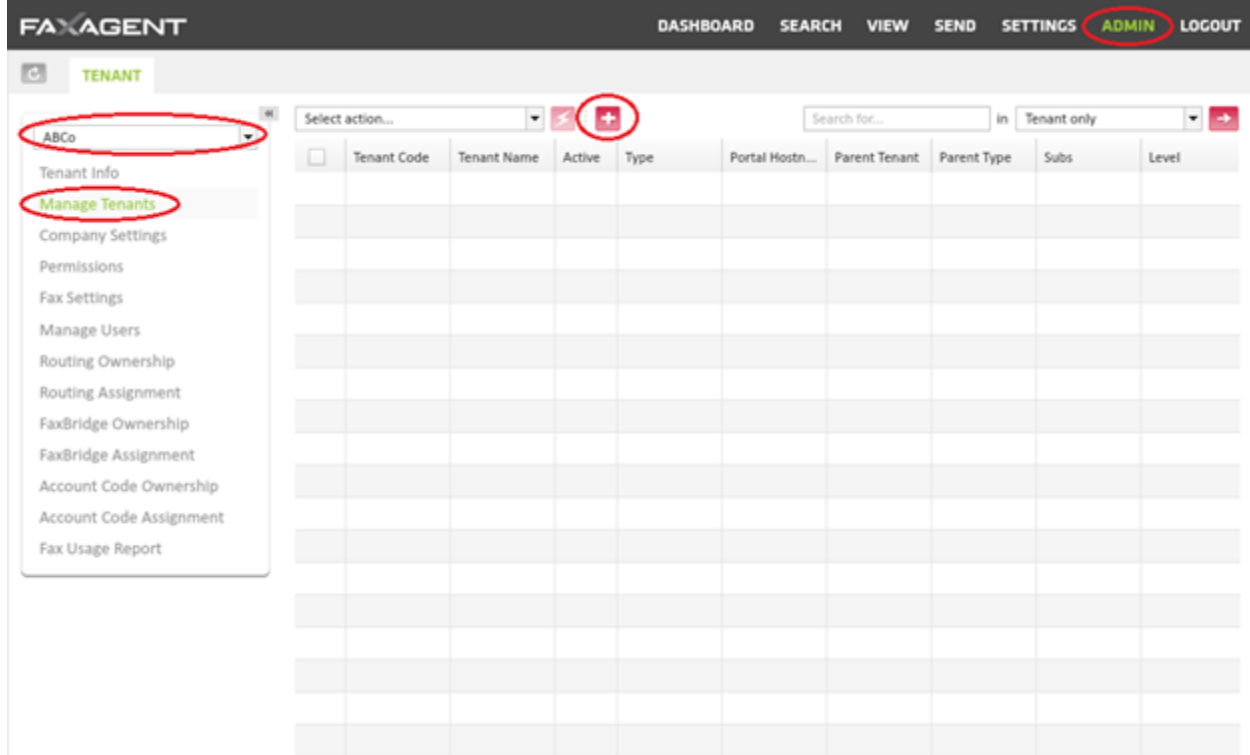


Creating a Tenant - Service Provider

1. Log in as an Admin to FaxAgent
2. Go to the Admin tab
3. Dropdown should say your Company Name
4. Select “Manage Tenants” from the list
5. And then select the “+” plus sign next to the “Select action...” drop down



6. Complete the info for the new Tenant

The screenshot shows the 'CREATE NEW TENANT' form. The form is divided into several sections: General Information, Administrative User, and Additional Company Information. The General Information section includes fields for Tenant Name, Tenant Code, Company Name, User Suffix, Parent Tenant, Type, Description, and Billing Code. The Administrative User section includes fields for Username, Password, Profile, Display Name, Email, and Phone. The Additional Company Information section includes fields for Phone, Fax, Email, Address 1, Address 2, City, State, Postal, and Country. The form is currently empty.

- o General Info
 - Tenant Name: *Usually the same as the company name*
 - Tenant Code: *Code must be at least 3 characters without spaces & must be unique*
 - Company Name:
 - User Suffix: *Suffix must be at least 3 characters without spaces & must be unique*
 - Parent Tenant: *This should be filled in already with your company name*
 - Type:
 - customer – *this should be sufficient for nearly all customers*
 - reseller - *this is if you have someone that is reselling your services; it allows them to create Tenants and has more advanced Admin rights*

- Description: *Use for your own purposes*
- Billing Code: *If you have a unique billing code for customer you can use it to track from here*
- Fax Settings
 - Cover Page: *select Cover Page from the drop down*
 - Local CSID: *what the customer wants as their Outbound Caller Send ID*
 - Local Caller ID: *Customers primary fax number that they want shown*
 - Local Number: *Customers primary fax number that they want shown*
 - Country Code: *1 – for US and Canada*
 - Area Code: *Provide local area code number of the customer*
- Administrative User
 - Username: *default is 'admin' and cannot be changed @ default is suffix & cannot be changed*
 - Password: *automatically assigned & cannot be changed here. Click show on the right; can change later*
 - Privilege: *select from drop down. Should be admin for the first user*
 - Display Name: *should be admin for this user*
 - Email: *admin's email*
 - Phone: *admin's phone number*
- Additional Company Information
 - Phone: *complete as needed*
 - Fax: *complete as needed*
 - Email: *complete as needed ed*
 - Address 1: *complete as needed*
 - Address 2: *complete as needed*
 - City: *complete as needed*
 - State: *complete as needed*
 - Postal: *complete as needed*
 - Country: *complete as needed*

7. When completed click "SAVE"

8. Select the refresh button in the top left hand corner

9. The Tenant will now show in the Tenant drop down list and when you select the see all Sub-tenants and press the arrow key

The screenshot displays the FAXAGENT web application interface. At the top, there is a navigation bar with the following items: DASHBOARD, SEARCH, VIEW, SEND, SETTINGS, ADMIN, and LOGOUT. On the left side, there is a sidebar menu with options: TENANT (circled in red), Tenant Info, Manage Tenants (highlighted in green), Company Settings, Permissions, Fax Settings, Manage Users, Routing Ownership, Routing Assignment, FaxBridge Ownership, FaxBridge Assignment, Account Code Ownership, Account Code Assignment, and Fax Usage Report. The main content area features a table with the following columns: Tenant Code, Tenant Name, Active, Type, Portal Hostname, Parent Te..., Parent Type, Subs, and Level. The table contains three rows of data:

Tenant Code	Tenant Na...	Active	Type	Portal Hostname	Parent Te...	Parent Type	Subs	Level
ABCO	ABCo	X	RESELLER	dev.faxagent.com	TEST	RESELLER	2	0
ABCUST	ABCust	X	CUSTOMER	dev.faxagent.com	ABCo	RESELLER	0	1
NEWCO	New Compar	X	CUSTOMER	dev.faxagent.com	ABCo	RESELLER	0	2

At the top of the table, there is a 'Select action...' dropdown menu and a search bar. A dropdown menu is open over the table, showing 'Sub-tenants' selected and a blue arrow button to the right. A refresh button (circular arrow icon) is circled in red in the top left corner of the table area.

10. You have now successfully created a Tenant.

