Systems Administration
Agent Management

User Manual

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About This Document

Purpose

Application Administrators or users with appropriate permissions may be required to create agent accounts to enable representatives place orders to a Service Provider. Correct configuration is important because it enables two vital things:

- The agent can place orders to a service provider with permissions that limit access to customers they are responsible for;
- The agent can accrue and be paid the correct commissions.

This document describes how to complete the setup of an Agent in Emersion so that commission plans will be correctly attributed to the Agent when they submit orders through to the Service Provider.

Other Emersion user manuals describe the use and operation of other system modules, such as Customer Management and Package Management, which may be mentioned or referred to within this manual.

Intended Audience

The intended audience for this user manual are sales, provisioning and other administration staff of a service provider who order and provisioning services for customers within the Emersion System.

Document Control

Version	Date	Description	Author
1.0	10/04/2014	Initial version	Sharon Carpenter

Introduction

On behalf of the team at Emersion, we would like to take this opportunity to welcome you to Emersion. Emersion may update the system to improve your experience. Enhancement and new features and changes may be implemented beyond the date of the creation of this document. Therefore, some information or screens in this version of the manual may become slightly out of date.

ⓘ Note that other Emersion modules referred to in this manual are not described in detail in this document. Please refer the specific Emersion system manual for further information about each module if required.

Document Conventions

The following conventions are used throughout this manual to describe information and procedures:

Italics	Indicates the name of a screen, field or setting. The capitalisation and punctuation are the same as displayed on the screen. For example: Complete the *Address* field.
Bold text	Bold text indicates either the name of a command, button or other interactive element. For example: Type the user's name in the *Customer Name* field, and then click **Search**.
BOLD CAPITALS	Text in bold capitals indicates the name of a key on a keyboard. For example: Type your password, and then press **ENTER**.
Navigation >	Menu options or navigation paths are described in shorthand using the following convention: **Module > Functional Area > Option** For example, selecting the Account Profile area can be described as: Select **Admin > Settings > Account Profiles** from the Menu**.**
`Monospace text`	Used to represent the text you may type in a field. For example Type `abc` in the *Search* field.
ⓘ	The ⓘ symbol indicates some useful information or a handy tip.

Where possible all images are taken directly from the Cumulus User Interface.

Assumptions Made

As this manual cannot hope to cover more than the operation of the Emersion Order and Service Management functions, the following assumptions have been made:

- You are familiar with the Emersion Customer Management System and you can competently use it.
- You have a computer that you can competently operate.
- You have an Internet connection, and are capable of establishing a connection.
- A Web Browser capable of supporting Web 2.0 functionality is installed on your computer.
- Acrobat® Reader version 6.00 or higher is installed on your computer.
- You have a basic understanding of computer and Internet terminology.
- You have a basic understanding of the day-to-day business operations of a Service Provider.
- You have an agreement with an Agency who will sell products and services on behalf of a service provider

Prerequisites

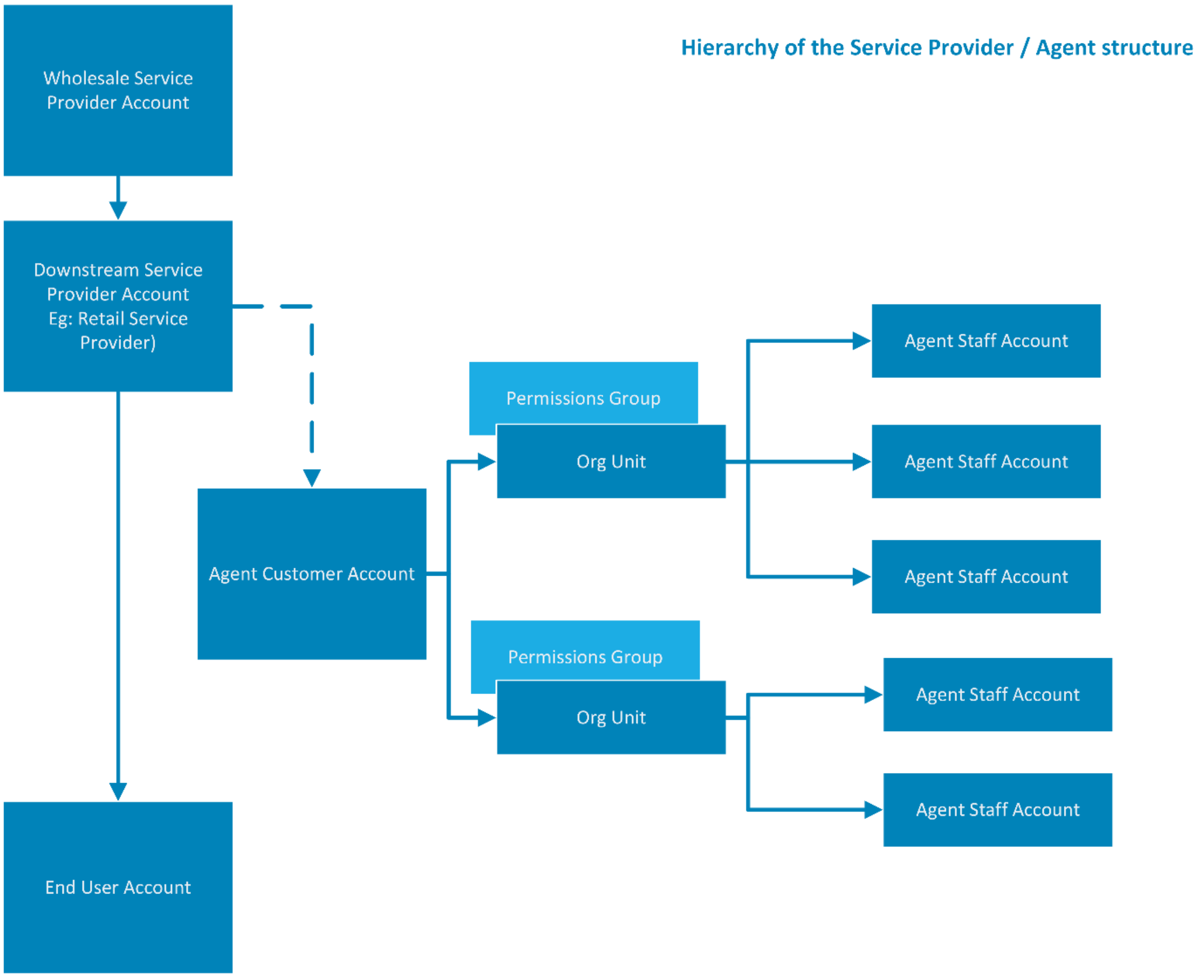
This document requires the following configuration to be completed in advance.

1. An Emersion role exists that contains the correct Base Powers (Permissions & access rights) that define what the Agent can see and do when logged into the Cumulus interface.
2. Commission plans are set up and applied to service subscriptions & products.

Agent Management Overview

Agents, or staff of agencies, that undertake sales activities on behalf of a service provider are implemented through a specific set of accounts, org units and roles organised & configured in a way that allows information to be shared appropriately across Emersion's multi-tier hierarchy.

The structure of the set up can be represented in the following diagram.



At the completion of this document, you will have created this above structure in full.

Setting up an Agent

The high level steps required to complete this process are:

- Create a customer of the type Agent.
- Create a new org unit for the agent to be added to, or have at hand the existing org unit to which the agent will be added.
- Apply the relevant permissions role to the new org unit
- Attach the Staff user to the new org unit
- Create a Staff account for the agent.

1.1.1 Create a Customer / Agent

The agent account created here is used to attribute the commissions, or financial transactions. They are stored against the account as credits. In addition, the Agent can be a customer of the service provider, and have services themselves from the Service Provider.

Follow the steps below to create the customer.

1. Log in with your UserAdmin account provided to you by Emersion or an account that has appropriate permissions to set up the Agent accounts & hierarchy.
2. Navigate: **Customers > Customer List**
3. Click the **Create New Customer** button.
4. Step though the wizard and complete:
    a. the Primary Contact (mandatory)
    b. the Billing Contact (mandatory)
    c. the Secondary Contact (optional).

Once you have finished, the main screen for the Customer will be displayed.

1.1.2 Creating an Org Unit for the Agent

Follow the steps below to create an organisation unit and attach the customer account to it.

1. Log in with your UserAdmin account or an account that has appropriate permissions to set up Agents.
2. Navigate: **Admin > Org Units & Roles**

On the Org Units tab:

3. Enter a name for the org unit. Here are some typical examples:
    a. Victoria, New South Wales, Queensland
    b. Metro, Regional
    c. Managers, Incumbents
4. Choose the Agent that you created earlier from the *Agent Account* list
5. Enter a pre-defined code for the org unit for this agent. This can be used in search to filter accounts based on this code.
6. Click **Next**.

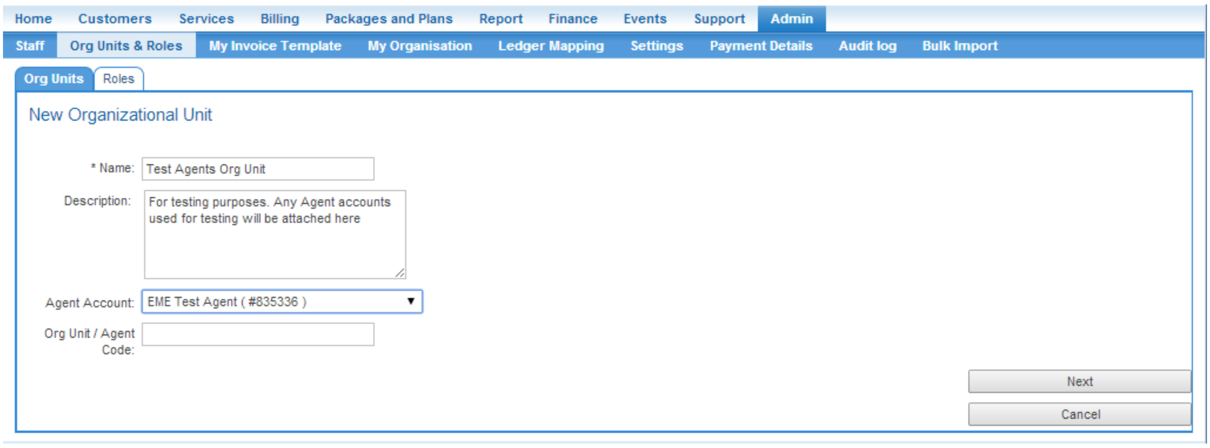


Figure 1 | Creating an organisation unit

The Org Units tab will display an expanded view.

7. Select the *Subscription Commission Plan* from the list that will apply to agents who are in this organisational unit.
8. Enter a *start date* from when the commission plan will apply to the group.
9. Select the *Product Commission Plan* from the drop down list that will apply to agents who are in this organisational unit and give it a start date.

The next section contains, on the right, a list of *Roles* that can be applied to the org unit so that all users who are placed in this group are granted the permissions of the role set. This will control what the can and cannot do in Emersion.

10. From the *Roles NOT IN* list, select move the groups to the *Roles IN list* to apply the permissions to the Org Unit.

In the example below you can see we have a single role group *Agent Commissions* that will apply to the Org Unit.

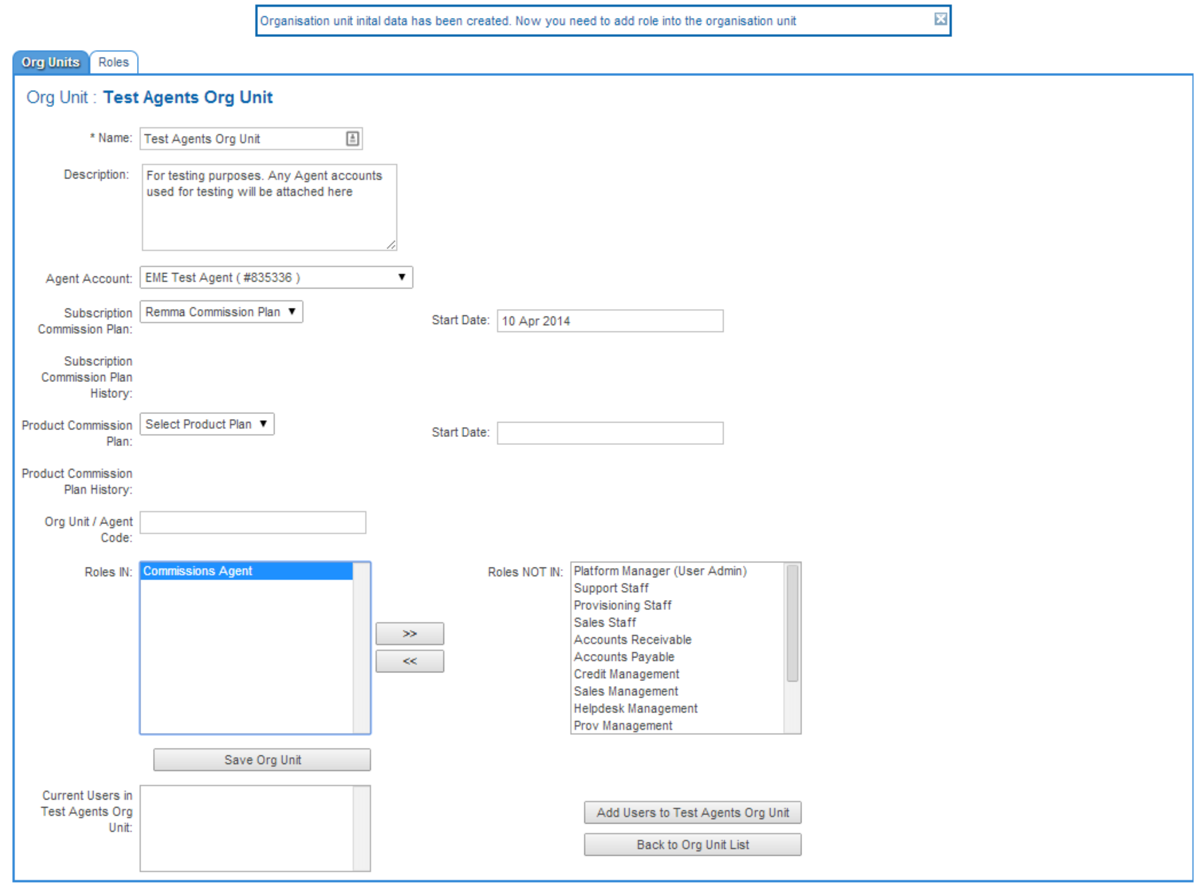


Figure 2 | Expanded Org Unit Page

11. Once you are happy with the changes, click the **Save Org Unit** button.

1.1.3 Creating a Staff Account for the Agent

The agent's staff account is created so that the agent can log in, place orders to the service provider and maintain their customers.

Follow the steps below to create a staff account for the agent that will be appropriately configured to manage their own customers and place orders.

1. Navigate: **Admin > Staff**
2. Click the **Create New Staff** button
3. From the *Org Unit* menu, choose the organisation unit that applies to this agent. This will be the same one that you created earlier.

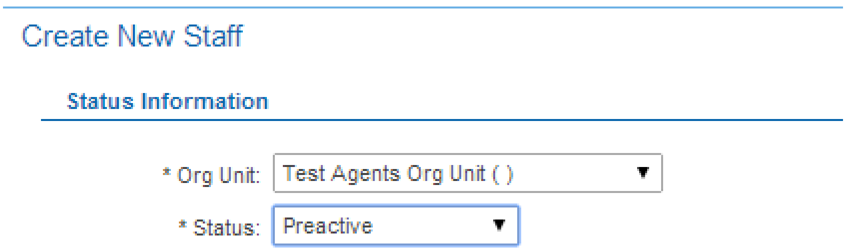


Figure 3 | Create New Staff > Status Information > Select the org unit as per fig. 2

4. Create the account in a status of *PreActive* until you are ready to give the agent their login details.

5. Complete the *Address information*, *Communication information* and *Privacy & Verification information* for the agent as you did earlier when creating the corresponding Customer account.
6. Assign the *Power Role*. This will be the same permissions set that was applied to the Org Unit as per figure 2.
7. Assign the agent a username and password in the *Cumulus User Login* section for the agent.
8. Click **Save**.

Further Information

For further information about Emersion's Ordering and Service Management functions, or other Emersion system modules, please contact Emersion.

If you are using Emersion on agreement from a supplier (i.e. in connection with the supply of a particular service or product), and have been provided a login for Emersion by your supplier, please contact your supplier directly for assistance.

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