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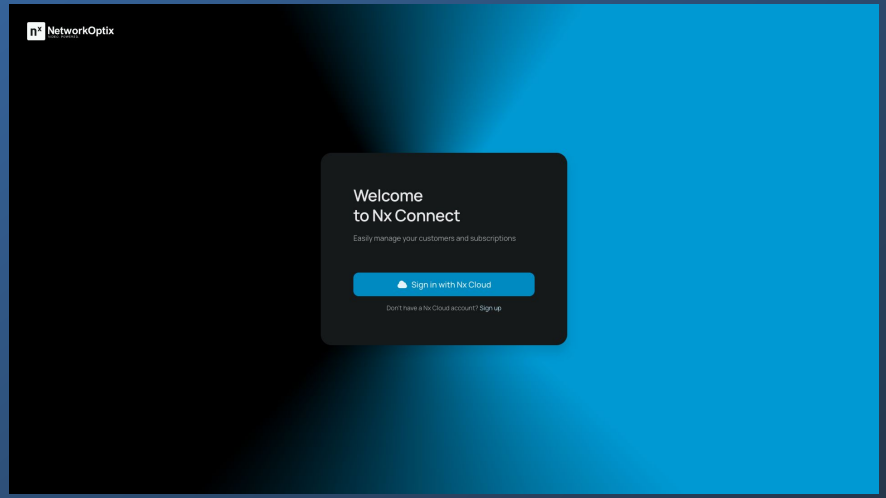
Nx Connect

- The Nx Connect Subscription Management Portal provides an intuitive Site for Channel Partners to manage their sub-Channel Partners and Organizations.
- `Connect.NxVMS.com`



01

Create and edit Channel Partners and Organizations

02

Manage service price, status, and credit limits

03

Custom ID for integration with external services (e.g., Salesforce, HubSpot, QuickBooks)

04

Visualize sales data including monthly charts to predict growth and manage risk.

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Key Concepts

Generation 6

- Generation 6 Enterprise introduces many powerful features to enhance and simplify enterprise operations.
- This course covers the actions of Channel Partner (CP) and Organization (ORG) users.
- The interface for actions performed by Channel Partners and sub Channel Partners are effectively the same

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Enterprise (Subscription Service) Model Overview

- Subscription Services ~~professional license~~
- Channel Partner □ sub Channel Partner(s)
  - Sets price
  - Delegate pricing adjustments
- Financial Reporting tools
  - Revenue
  - Gross profit
  - Usage charges
  - Credit limits
- Operational State

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Key Concepts

Terms

- ***Channel Partner (CP)*** – denotes a current CP that may have additional sub Channel Partners
- ***sub Channel Partner*** – denotes a child CP reporting to a parent CP
- ***(sub) Channel Partner*** – denotes either a parent or child Channel Partner
- ***Organization (ORG)*** - A collection of Sites reporting to a (sub) Channel Partner
- ***Site*** – One or more servers (Sites were known as systems prior to Gen6)

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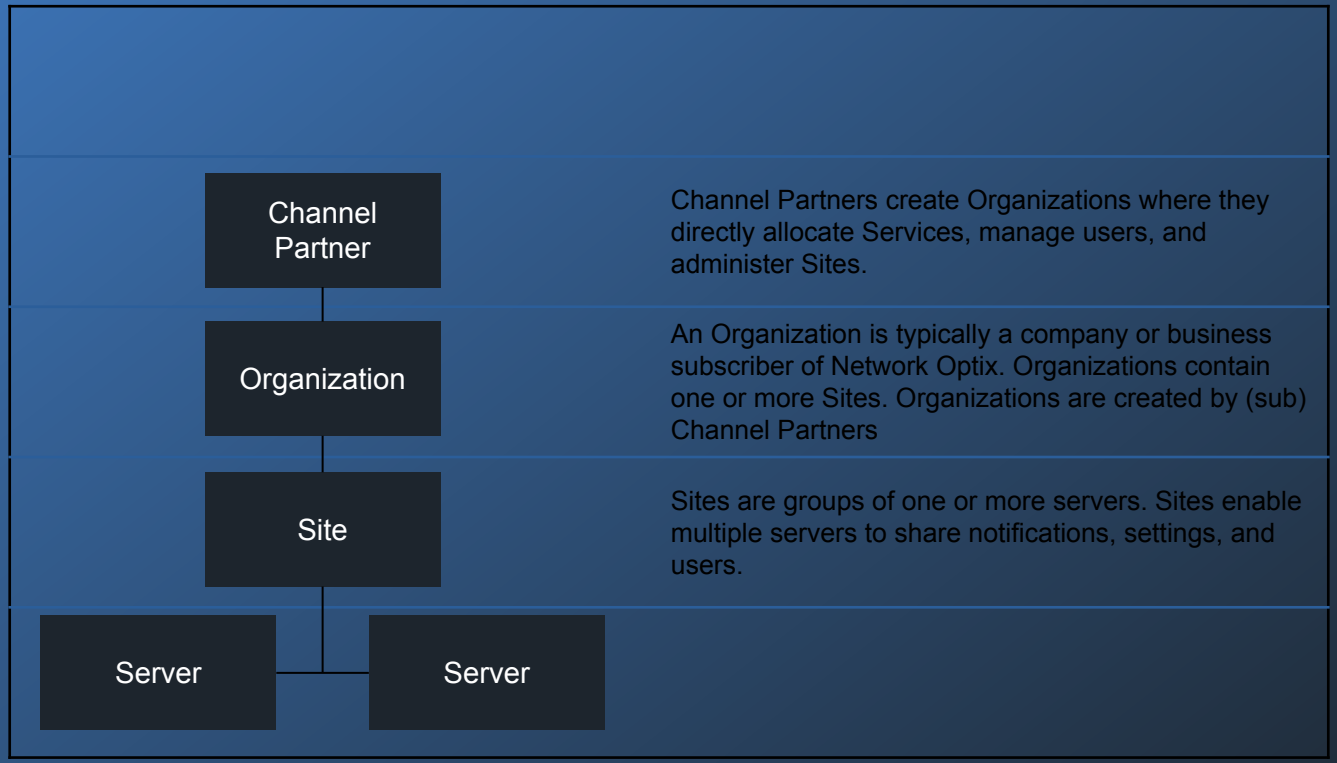
Hierarchy



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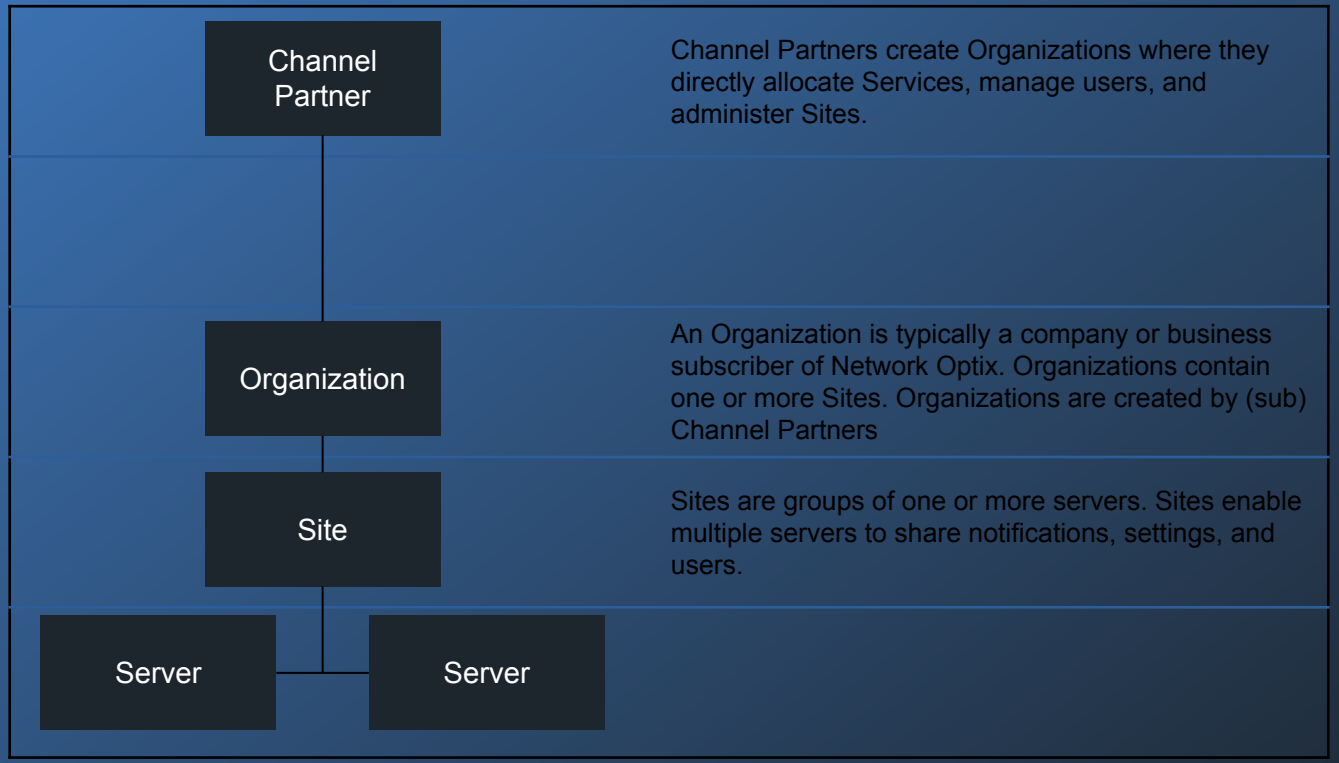
Hierarchy



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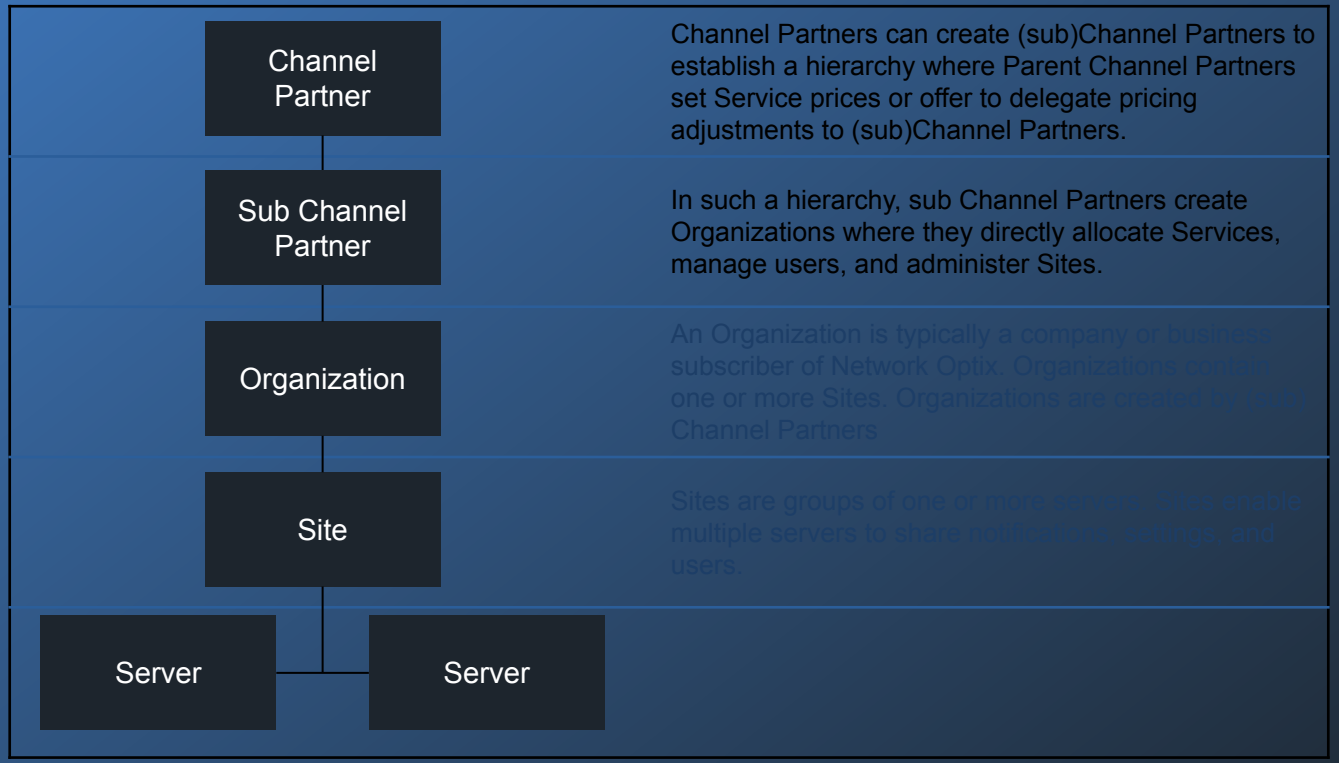
Hierarchy



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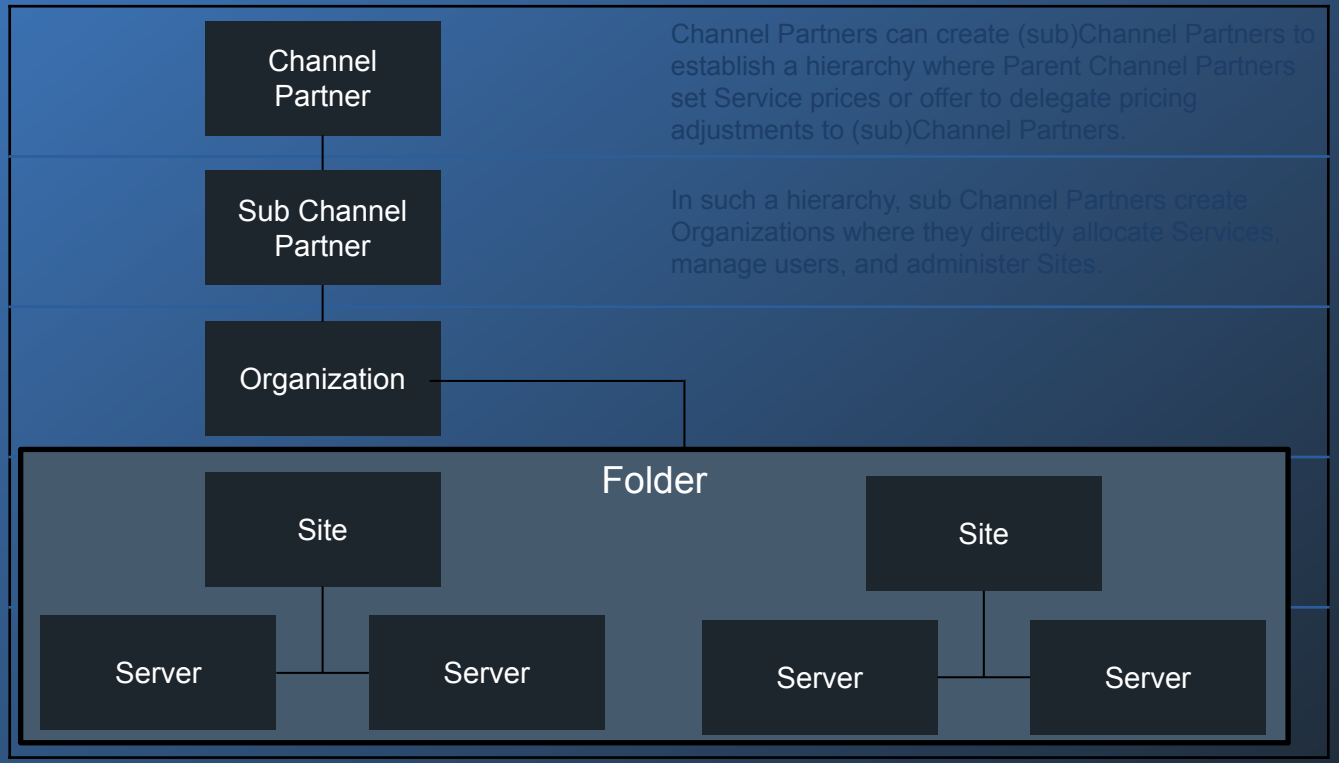
Hierarchy



Channel Partners can create (sub)Channel Partners to establish a hierarchy where Parent Channel Partners set Service prices or offer to delegate pricing adjustments to (sub)Channel Partners.

In such a hierarchy, sub Channel Partners create Organizations where they directly allocate Services, manage users, and administer Sites.

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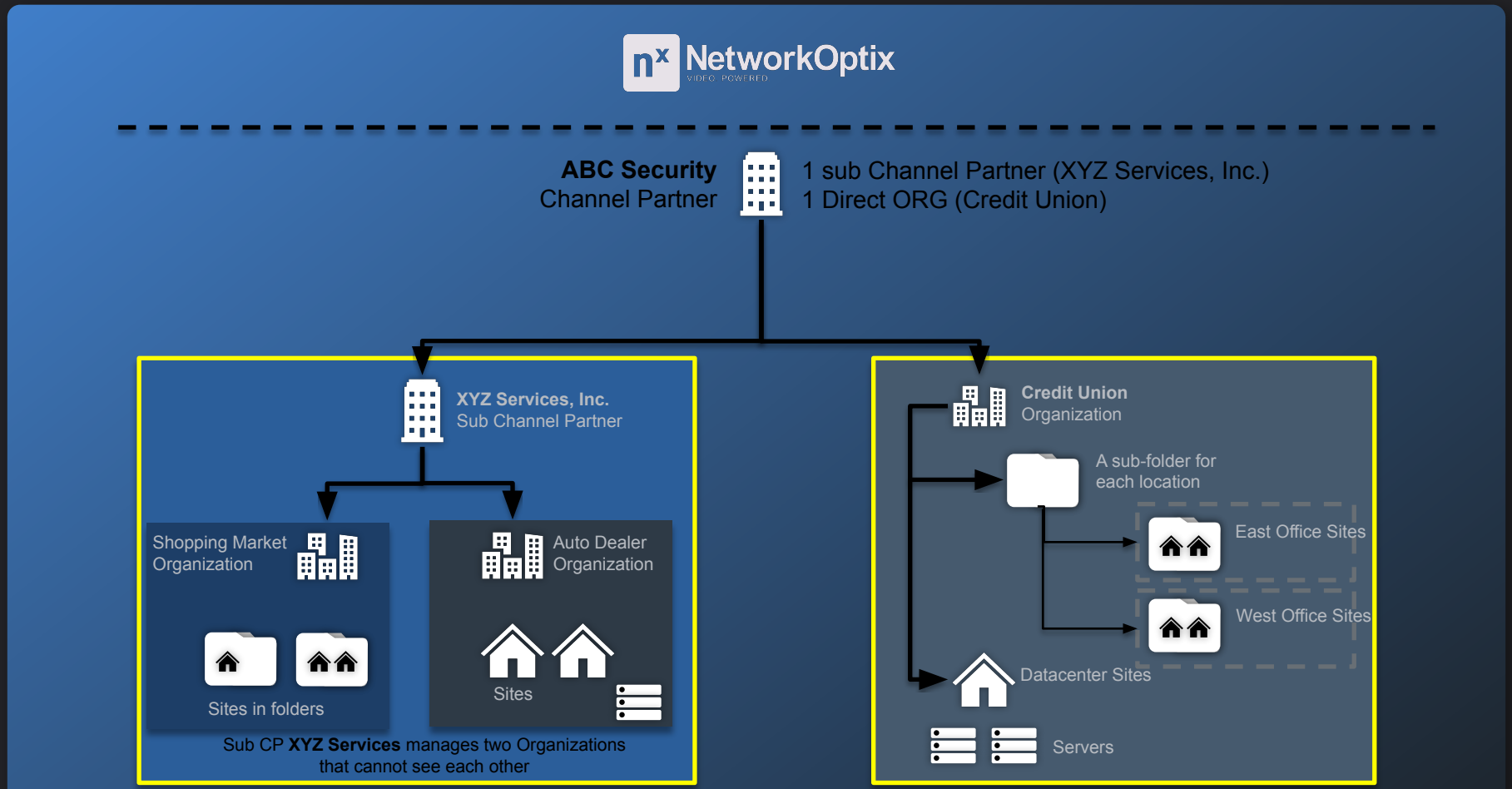
NetworkOptix
VIDEO POWERED
ABC Security
Channel Partner
1 sub Channel Partner (XYZ Services, Inc.)
1 Direct ORG (Credit Union)
XYZ Services, Inc.
Sub Channel Partner
Shopping Market
Organization
Sites in folders
Auto Dealer
Organization
Sites
Sub CP XYZ Services manages two Organizations
that cannot see each other
Credit Union
Organization
A sub-folder for
each location
East Office Sites
West Office Sites
Datacenter Sites
Servers

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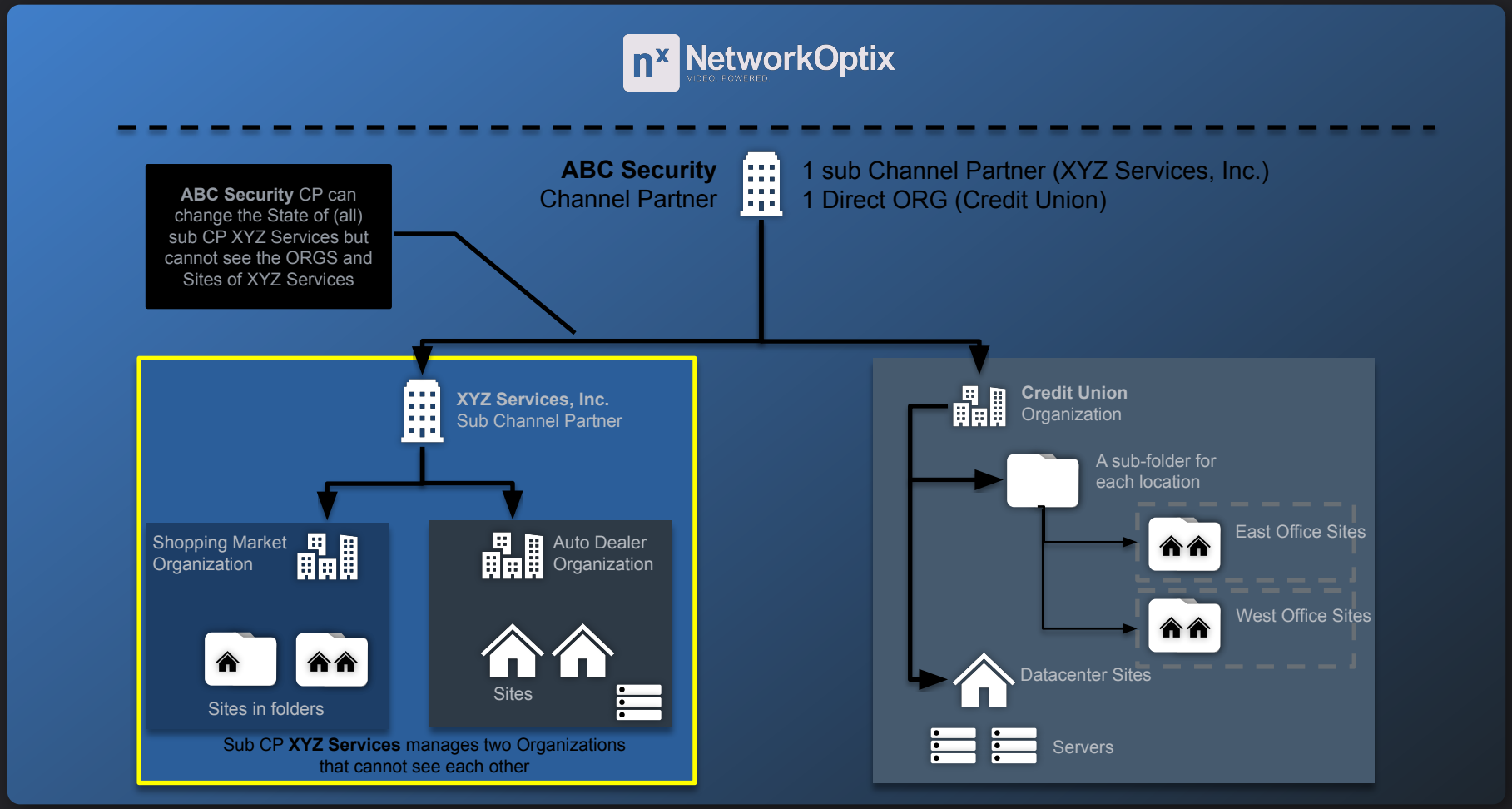
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ABC Security CP can change the State of (all) sub CP XYZ Services but cannot see the ORGS and Sites of XYZ Services
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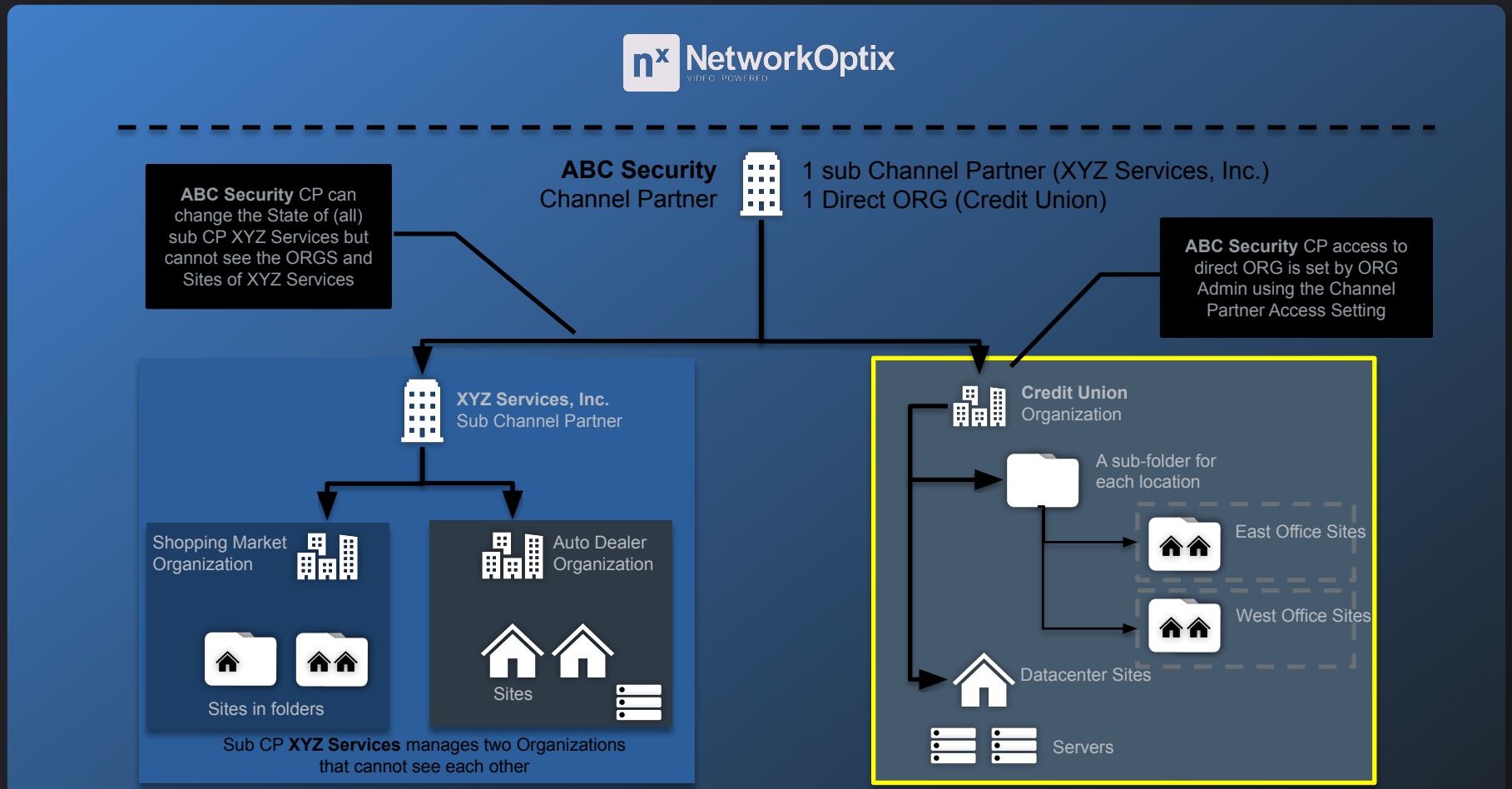
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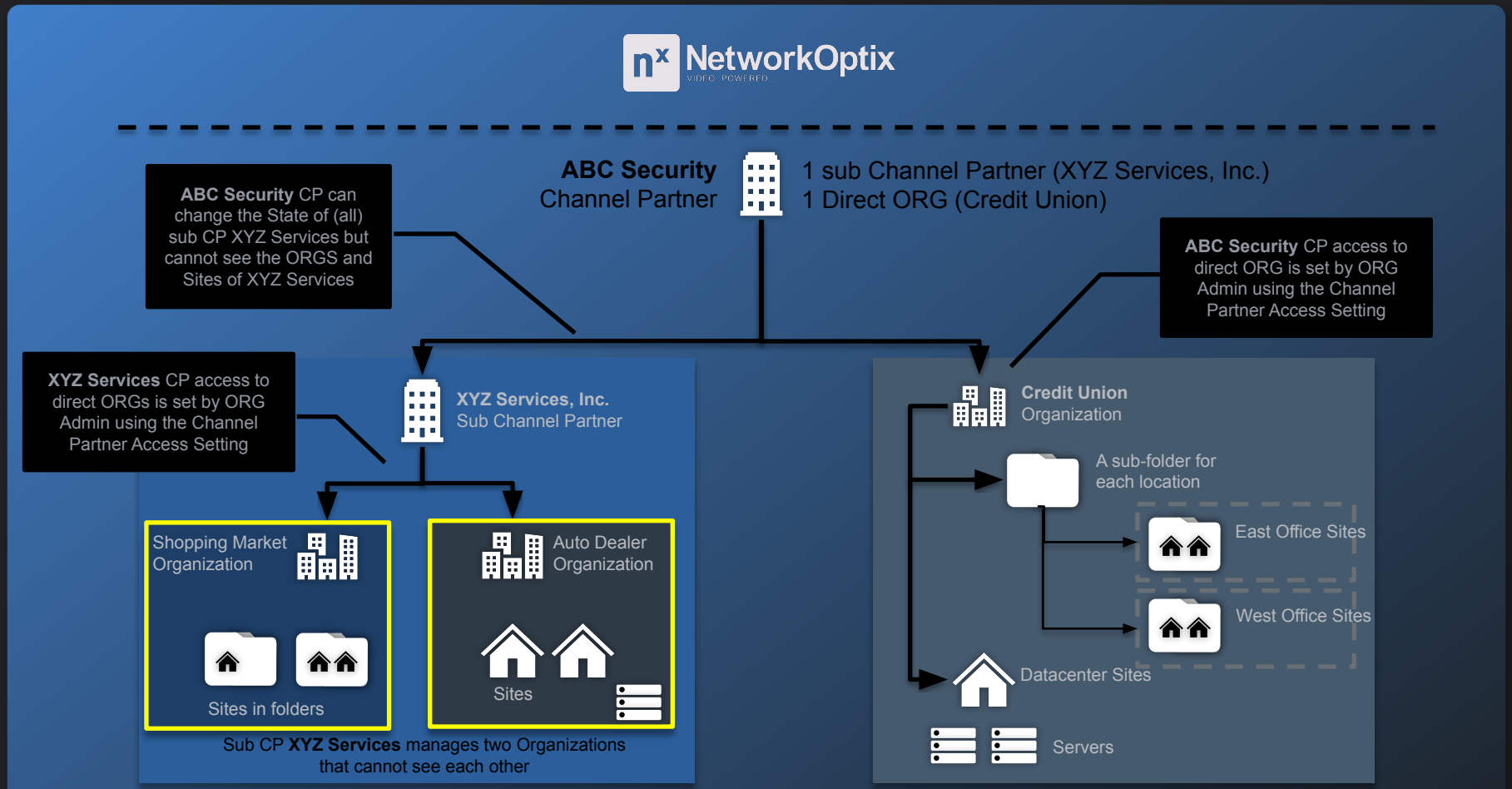
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Sub CP XYZ Services manages two Organizations that cannot see each other

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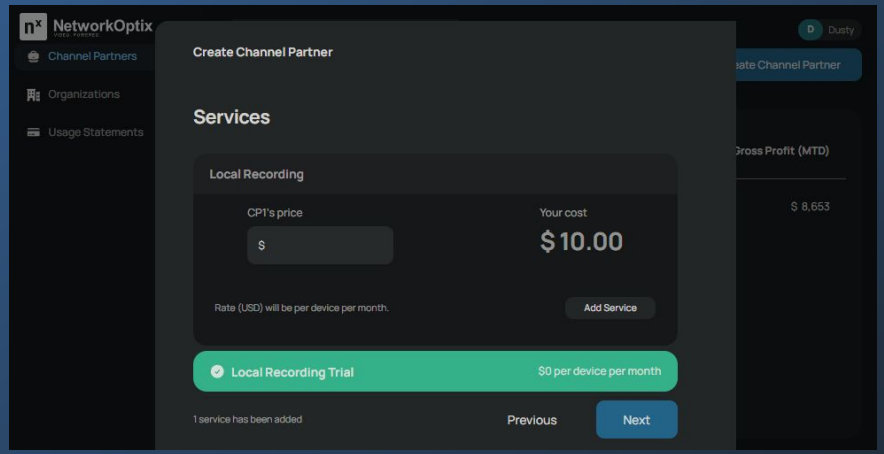
Manage (Sub) Channel Partner

- Creating a (sub) Channel Partner enables unique and separate Organizations, folders, Sites, and users to exist under a sub Channel Partner that receives Services from their parent Channel Partner.



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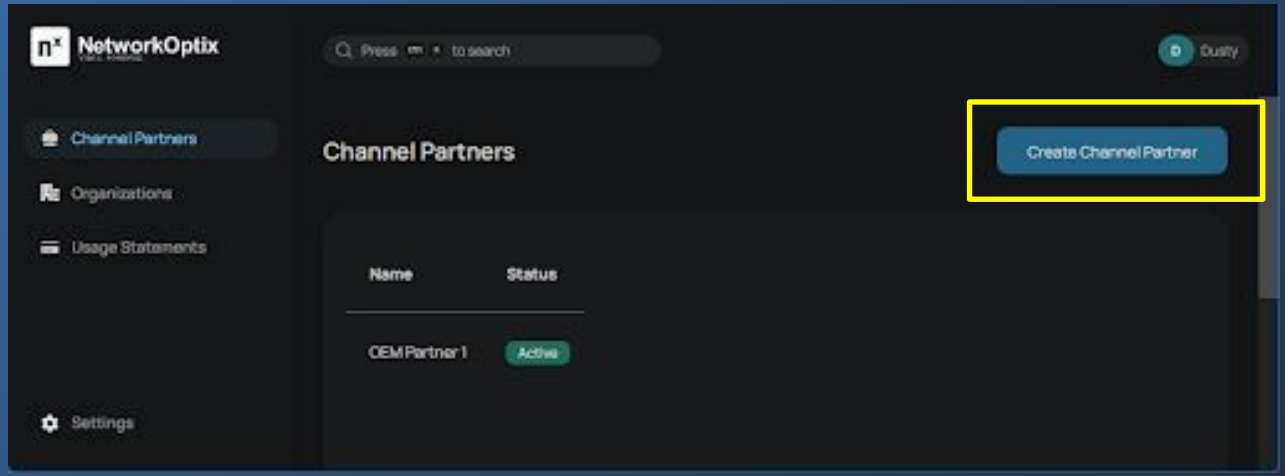
Channel Partner Tab



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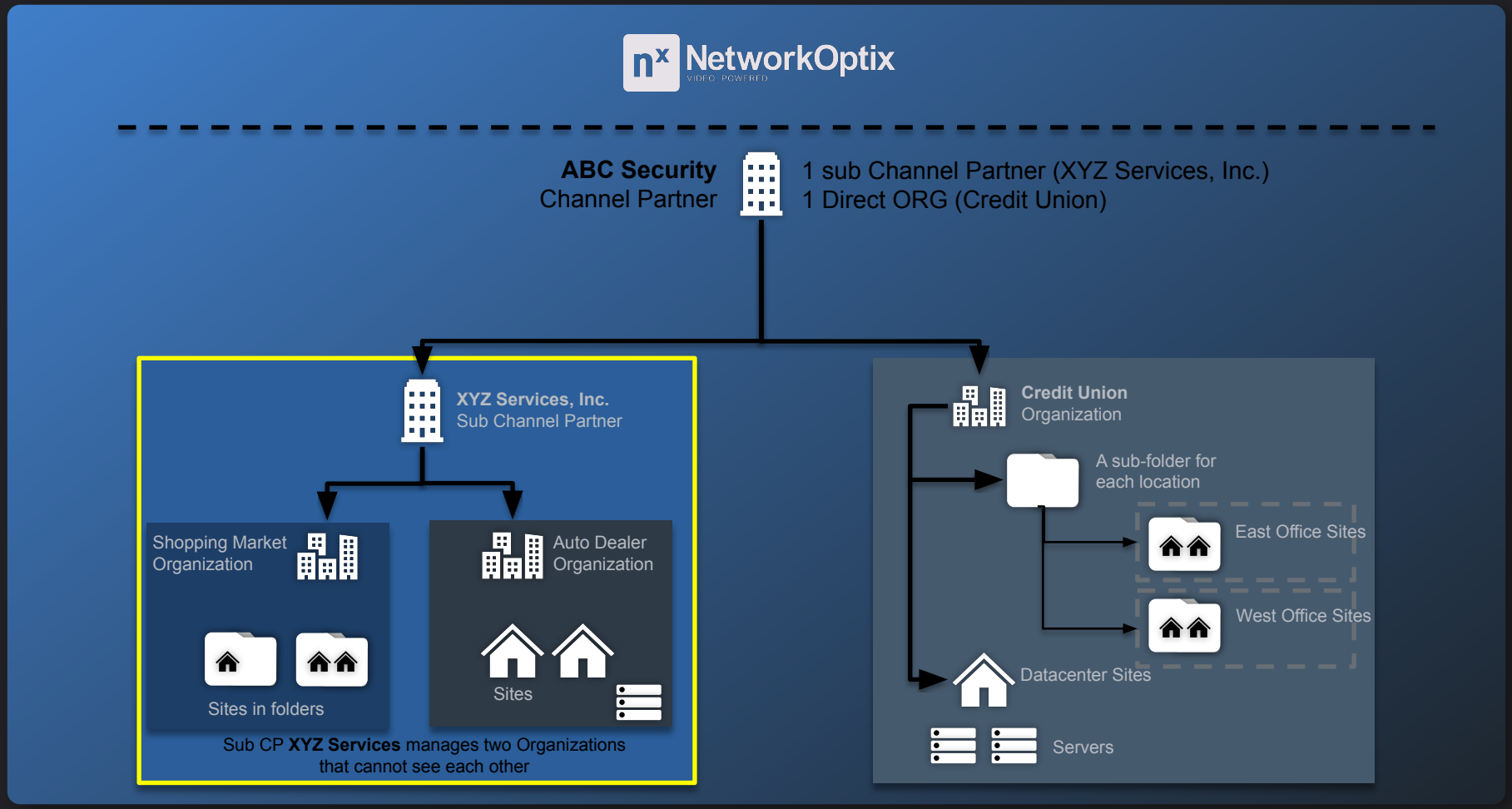
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Demo/Lab

Try the Following: Create a sub Channel Partner

1. Log into Nx Connect as an Administrator.
2. Select the Channel Partners tab on the left side menu.
3. Click the Create Channel Partner button.
4. Provide all information required by the Create Channel Partner dialog.
5. Click the Next button.
6. Enter contact Information:
    - One Account Manager (main contact for this sub Channel Partner)
    - One Administrator (main contact for the parent Channel Partner)
    - One Accountant - optional.
7. Click the Next button.
8. Select the Services that will be available to the sub Channel Partner, set the Service price, and click the Add Service button located below the pricing information.
9. Optionally populate the Custom field with a Customer Management System or other reference.
10. Click the Next button...

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Operational States

State	Functional Description
Active	The fully operational State for a (sub) CP or an ORG. All users can access their permitted CP/ORG Sites via the Cloud Portal, the Desktop Client, and the Web Admin (when on the same local network as the Site). Recording Services are running as configured within the Site Settings.
Delinquent	Account is delinquent or in arrears in some aspects of their billing agreement. Informational notifications are sent to sub Channel Partners and Organization.
Suspended	Limits access to CP/ORG Sites while keeping all Services running. User access via the Cloud Portal is not permitted. Only the Desktop Client or Web Admin interface can be used to access Sites over the local network.
Shutdown	Stops all Services and disables all Cloud Portal access. Only the Desktop Client or Web Admin (when on the same local network as the Site).

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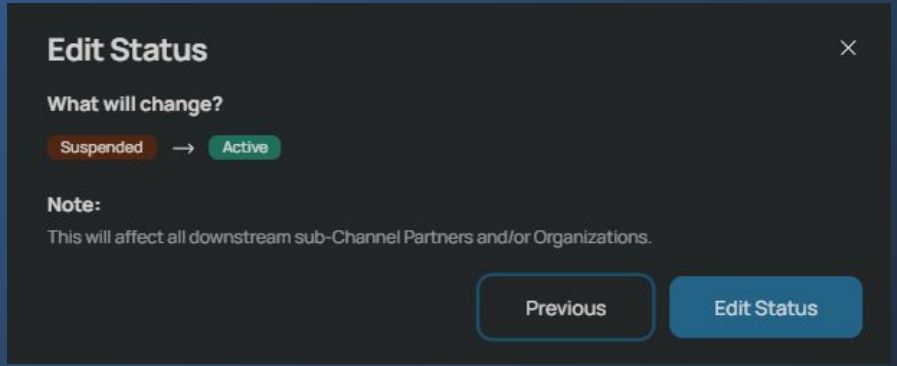
Try the Following: Change Status of a sub Channel Partner

1. Log into Nx Connect as an Administrator.
2. Select the Channel Partners tab on the left side menu.
3. Select the Channel Partner from the table displayed.
4. Click the Edit button in the upper right hand corner to open a sub-menu, select Status.
5. Select the intended Status and click the Next button.
6. Confirm the Status change by clicking the Edit Status confirmation button.



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Team Member Roles

Role	Description of Permitted Actions
Administrator	Create sub Channel Partners, Organizations, and accounts for Team Members. Modify the Company and Contact Information for sub Channel Partners. View Revenue and Profit charts for sub Channel Partners and direct Organizations. Manage the services available to sub Channel Partners and direct Organizations. View Service and Subscription prices set by the parent Channel Partner. View usage statements and change reports.
Manager	View Revenue and Profit charts for sub Channel Partners and report direct Organizations. Manage the services that are available to directly managed Organizations. View Service and Subscription prices set by the parent Channel Partner. View usage statements and change reports.
Accountant	Limited to viewing Usage Statements.

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Try the Following: Manage Team Members

Add a Team member:

1. Log into Nx Connect as an Administrator.
2. Click on the Settings gear icon at the bottom of the left side menu to open the Settings dialog.
3. Select Team Members on the left side menu of the Settings dialog.
4. Click the Add New User button located above the table of existing users.
5. Provide the email address of the new user and their role.
6. Click the Save button to finish adding the user.

Edit a Team Member:

1. While still logged into Nx Connect as an Administrator.
2. Click on the Settings gear icon at the bottom of the left side menu to open the Settings dialog.
3. Select Team Members on the left side menu of the Settings dialog.
4. In the table of Team Members, open the 3-dot menu to the right side of the Name field.
5. Select Edit User from the 3-dot pop up menu.
6. Make changes to User attributes and click Save.

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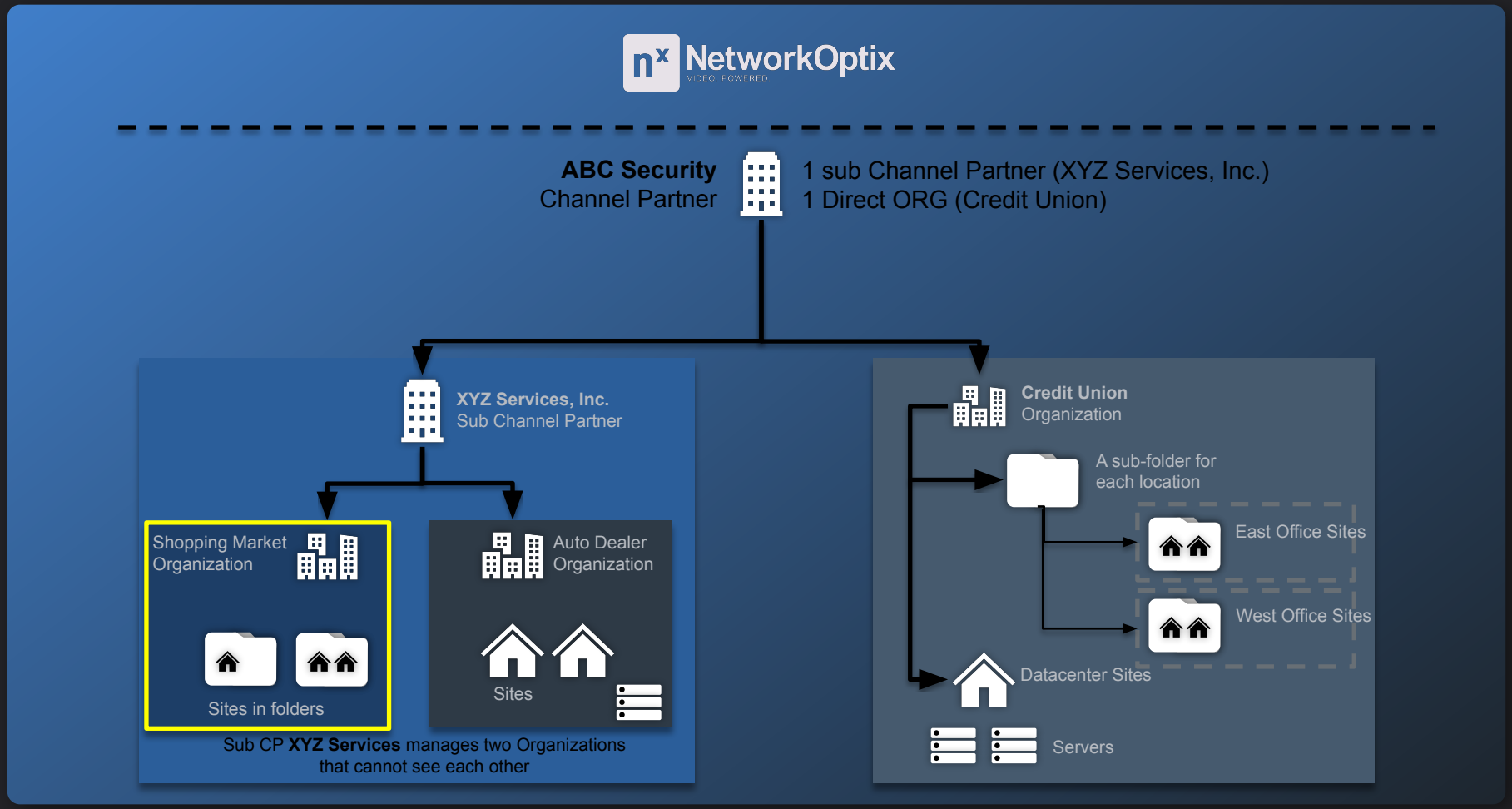
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Demo/Lab

Try the Following: Create an Organization

1. Log into Nx Connect as an Administrator.
2. Select the Organizations tab on the left side menu.
3. Click the Create Organization button.
4. Enter a Company Name for the Organization and optional physical address and website.
5. Click the Next button...
6. Enter Contact Information consisting of:
    - One Account Manager (main contact for the parent Channel Partner)
    - One Administrator (main contact for the parent Channel Partner)
    - One Accountant - optional.
7. Click the Next button...
8. Select the Services that will be available to the sub Channel Partner and set the price.
9. Click the Next button.
10. Optionally populate the Custom field with a Customer Management Site or other reference.
11. Click Create to finish creating the Organization.

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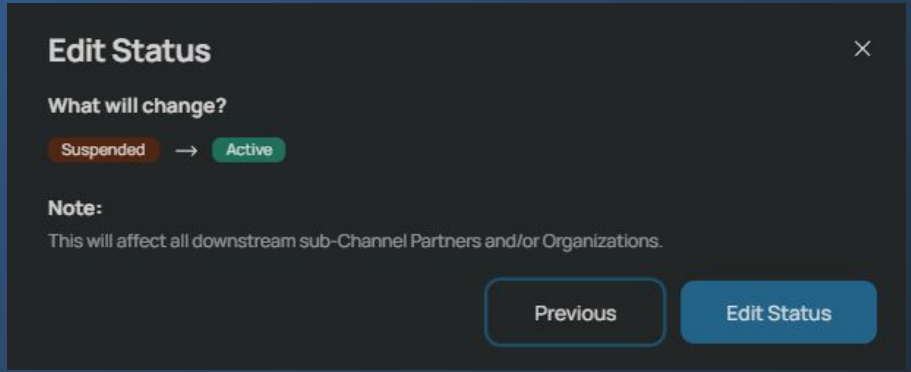
Try the Following: Change the State of an Organization

1. Log into Nx Connect as an Administrator.
2. Select the Channel Partners tab on the left side menu.
3. Select the Channel Partner from the table displayed.
4. Click the Edit button in the upper right-hand corner to open a sub-menu, select Status.
5. Select the intended Status Enter the Channel Partner and click the Next button.
6. Confirm the Status change by clicking the Edit Status confirmation button.



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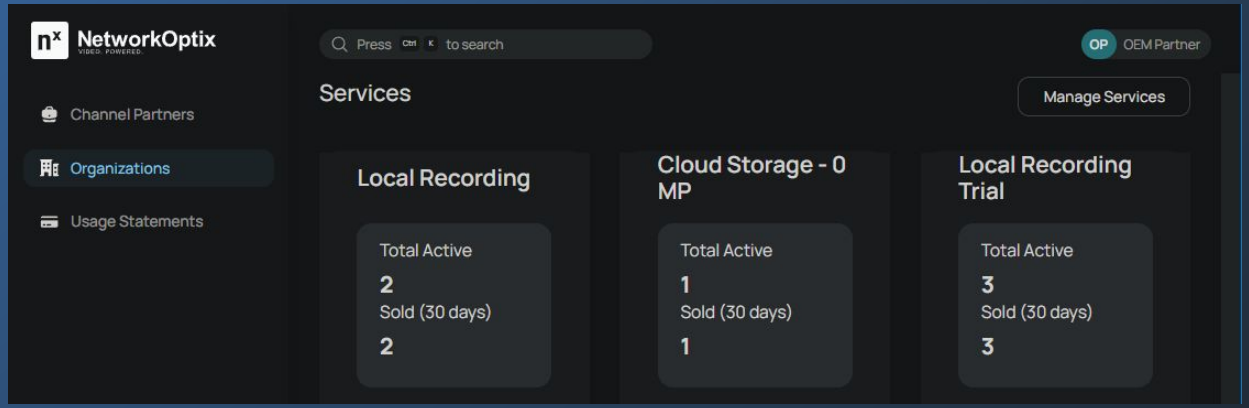
Services

- The Services that are offered and made available to Channel Partners and Organizations are first authorized when creating new sub Channel Partners and Organizations.
- Additional Service offerings and increased capacity for existing Services can be added at any time.



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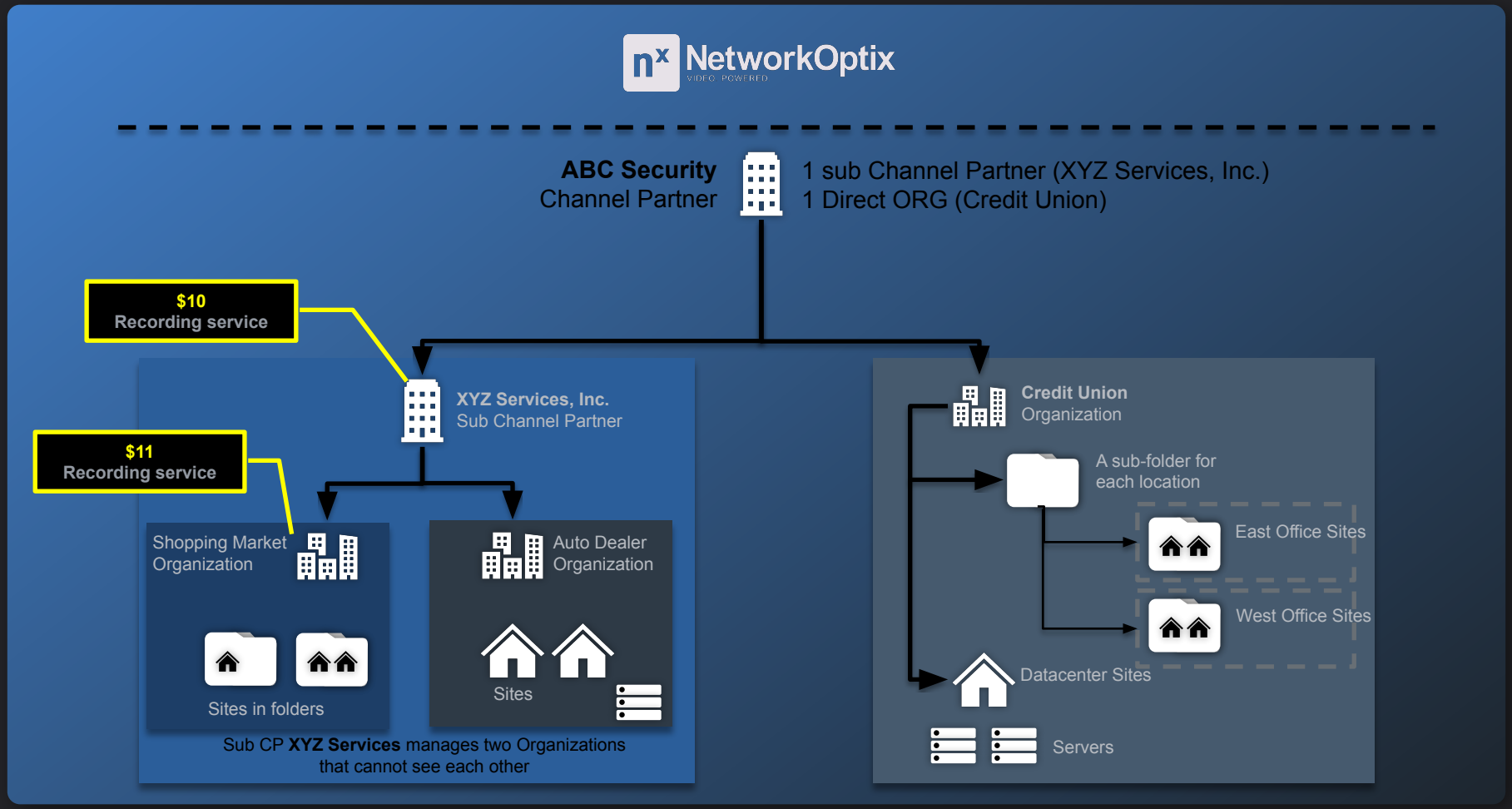
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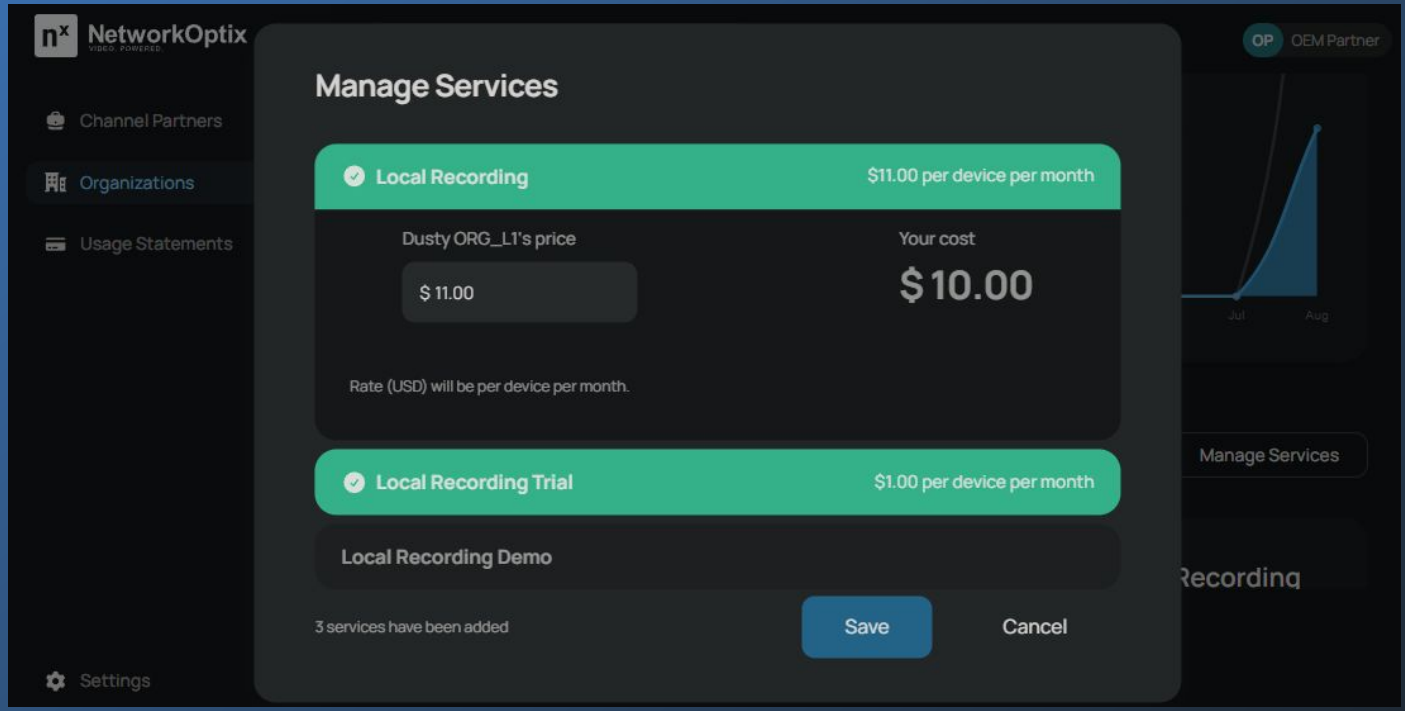
Service Configuration



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Services and Subscriptions

Key Concepts

- Each Service has a recurring Subscription fee negotiated with the parent (sub) Channel Partner.
- Clients are billed for all Subscriptions available to their Organization, including those not in use.
- All Services and Cloud User access can be toggled by changing the Operational States.
- Channel Partners reselling Services above cost generate monthly profit from each Subscription.
- Subscription prices paid to (sub) Channel Partners and Organizations are easily adjusted.

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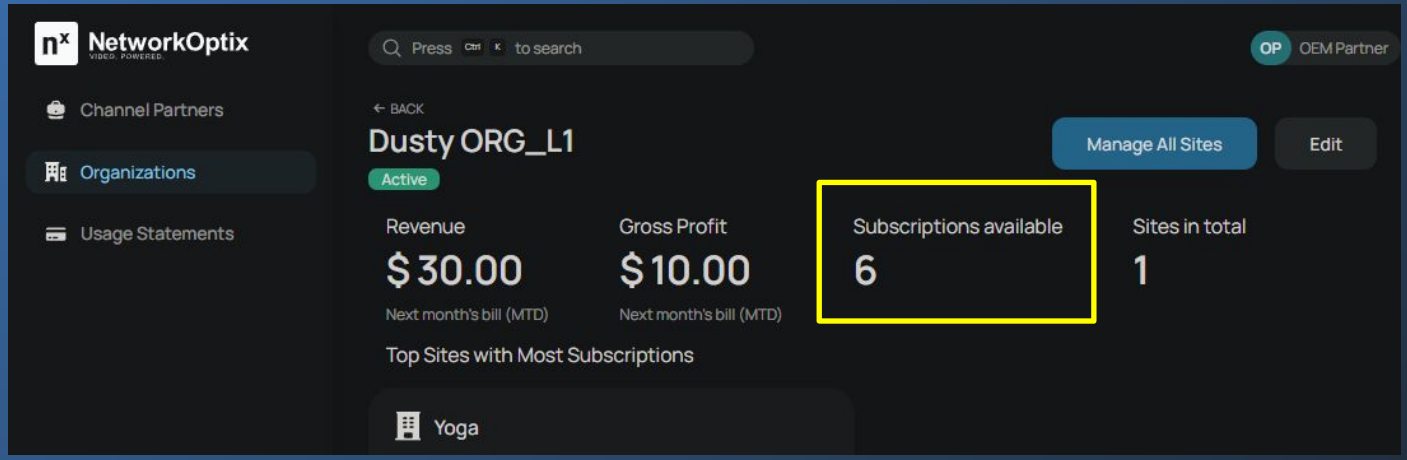
Subscription Configuration



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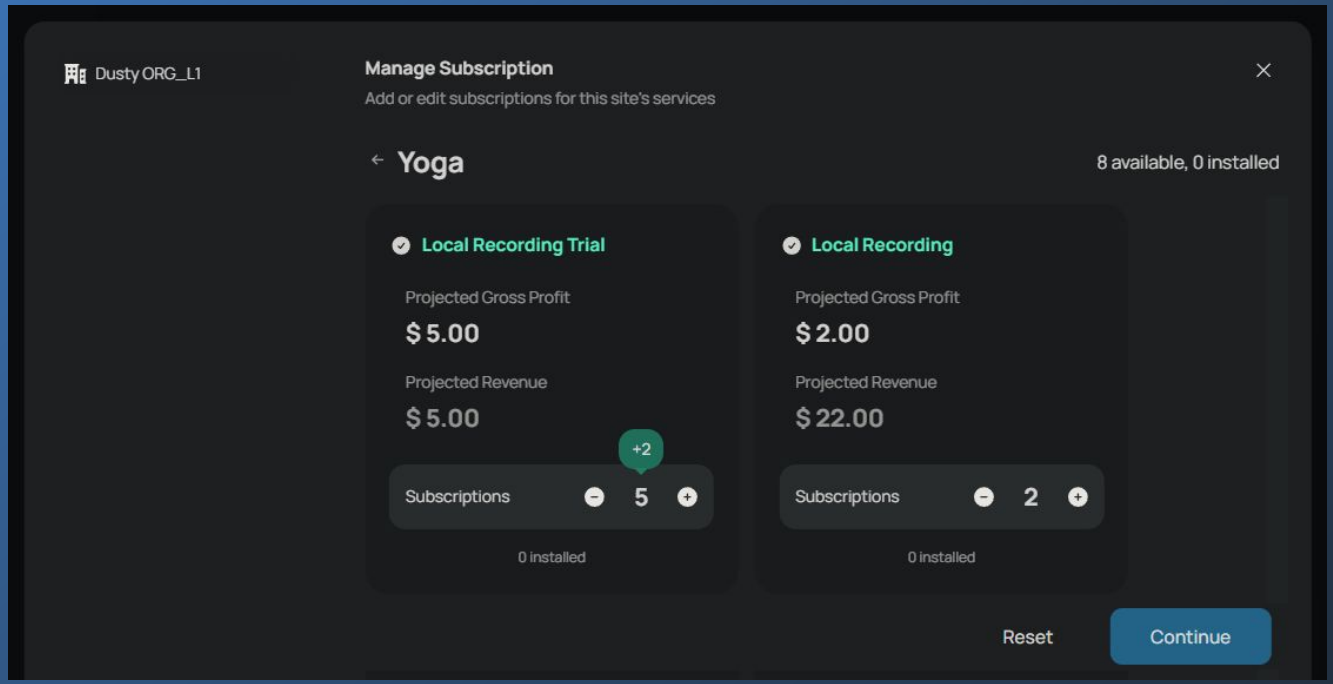
Subscription Configuration



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Demo/Lab

Try the Following: Services Adjustments

Navigating to the Services dialog is similar for both Channel Partners and Organizations.

1. Log into Nx Connect as an Administrator.
2. Select either the Channel Partners or the Organizations tab on the left side menu.
3. From the table displayed, select the Channel Partner or the Organization to modify.
4. Scroll down below the summary numbers, counts, and 12-month Revenue & Profit Chart to find the summary of Services section – click the Manage Services on the right side of the heading.

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Continue to Practice

- Build more Direct Organizations
- Build more Organizations under your sub Channel Partners
- Add and price services
- Create more subscriptions
- Create Folders
- Brand your sub Channel Partners

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End!

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Folders

Considerations

- Use descriptive Folder names
- Folders inherit users and permissions from parent Folder or Organization
- State changes made to an Organization apply to all Folders and Systems in the Organization
- Users added to a Folder have access to all Systems in the Folder
- Folder contents move up one level when a Folder is deleted.

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Manage Organization Users

Organization User Permissions

Group Name	Permissions Granted
Organization Administrator	Manages all aspects of the Organization Can add Systems to the Organization
Administrator (System)	Manages Systems, folders, and users within the Organization Manages Administrators and Power users
Power User (System)	Can view all Organizational Systems, folders, and users Manages all other user types (not Administrators and Power users) Can create and restore backups with restrictions
System Health Viewer (System)	Can view all alerts and System health monitors
Viewer (System)	Can view live video, browse archives, and control specific devices
Live Viewer (System)	Can view live video, browse archives, create bookmarks, and export video

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Organization User Management

Actions and Permissions

	Task or Action			
Permission Group	View ORG Users	Create ORG Users	Edit ORG Users	Delete ORG Users
CP Administrator	Within Own CP or if an ORG Administrator has granted access.			
CP Manager				
ORG Administrator	Can manage all properties of ORG users			

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Folders

Actions and Permissions

	Task or Action			
Permission Group	View Folders	Create Folders	Edit Folders	Delete Folders
CP Administrator	Within the ORGs of the own CP or if an ORG Administrator has granted access.			
CP Manager				
CP Report Viewer	N/A			
ORG Administrator	View all within the ORG	Permitted within the ORG		
ORG Other Permission Groups		N/A		

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Demo

Manage Folders

- Create a Folder
- Add a User to a Folder
- Manage User Access to Folders and Organizations
- Move a Folder within an Organization
- Rename a folder
- Delete a folder

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Connect Systems to Organizations

Actions and Permissions

<table>
<tr><th></th><th colspan="4">Task or Action</th></tr>
<tr><th>Permission Group</th><th>View Systems</th><th>Log into Systems</th><th>Bind System to an ORG</th><th>Unbind System from an ORG</th></tr>
<tr><td>CP Administrator</td><td colspan="4" rowspan="2">Within the ORGs of the own CP or if an ORG Administrator has granted access.</td></tr>
<tr><td>CP Manager</td></tr>
<tr><td>CP Report Viewer</td><td colspan="4">N/A</td></tr>
<tr><td>ORG Administrator</td><td rowspan="3">In own ORG</td><td colspan="2">Only within their ORG and only when in an Active State</td><td>Only from their own ORG</td></tr>
<tr><td>ORG System Administrator</td><td rowspan="2">N/A</td><td colspan="2">ORG Administrator confirmation is required and the System must be in an Active State</td></tr>
<tr><td>ORG All Other Permissions</td><td colspan="2">N/A</td></tr>
</table>

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Demo/Lab

Try the Following:

- Transferring a Cloud System to an Organization
- Connecting a Local System to an Organization

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Manage Services

Actions and Permissions

Task or Action	ORG Services		System Services		View CP Aggregate Services	View ORG Aggregate Services
Permission Group	View	Allocate	View	Allocate		
CP Administrator	All Levels	To direct CP	View the total available Services and the number of Services in use.	N/A	All levels within their own Channel	
CP Manager						
CP Report Viewer		N/A				
ORG Administrator	In own ORG				N/A	
ORG System Administrator	N/A		View all and allocate Services. Cannot change the total number of available Services			

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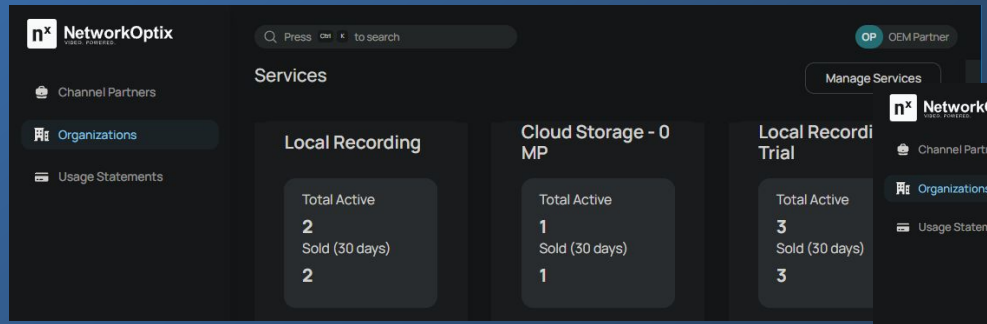
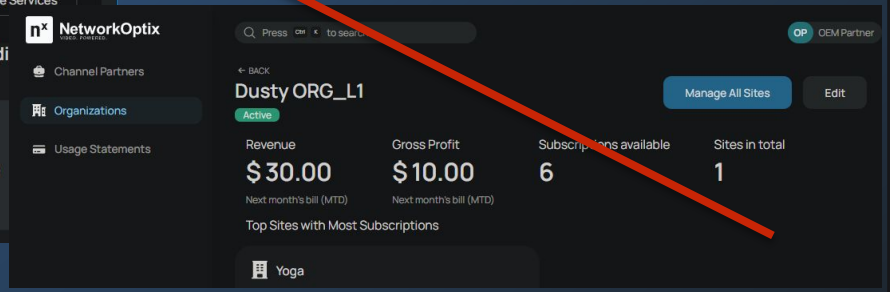
Demo

Try the Following:

- Allocate Services to a System within the Organization
- View Service Allocations within a System
- Change the Total Services Available within a System





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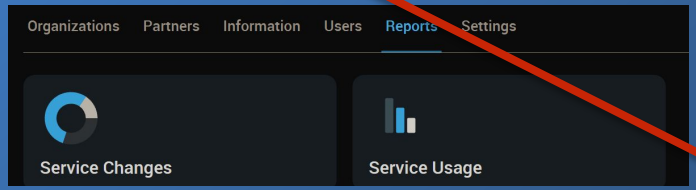
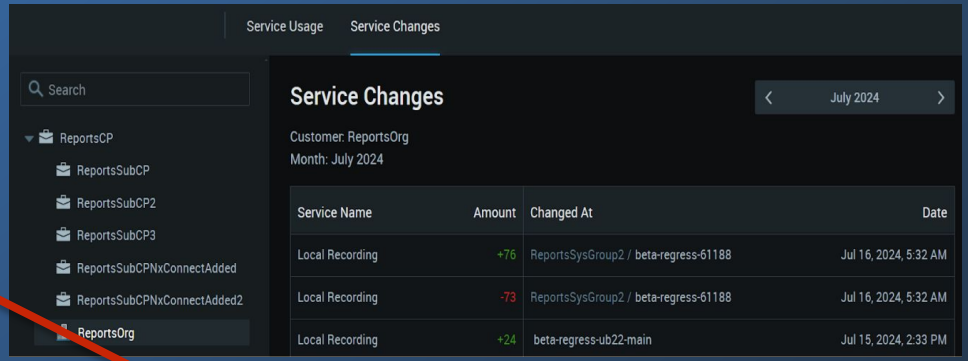
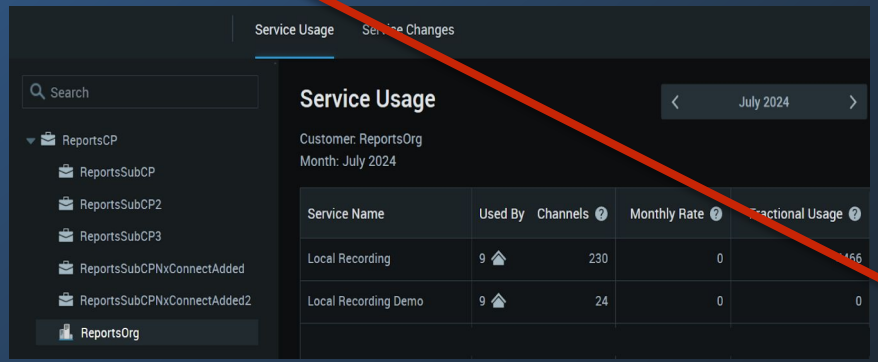
Service Reports







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Demo

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XYZ Services, Inc.
Sub Channel Partner

Shopping Market Organization

Systems in folders

Auto Dealer Organization

Systems

Sub CP **XYZ Services** manages two Organizations that cannot see each other

Credit Union
Organization

A sub-folder for each location

East Office Systems

West Office Systems

Datacenter Systems

Servers

NetworkOptix

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Manage (Sub) Channel Partners

(Sub) Channel Partner Actions and Permissions

	Task or Action				
Permission Group	View CPs	Create CPs	Modify a CP	Delete a CP	Change CP State
CP Administrator	Can view all settings for self and direct sub CPs Can view only ID and parent of direct sub CPs' children Manages Organizations and users that report to the Channel Partner Limited to viewing Service usage reports	Can only create direct sub CPs	Can change self CP name	N/A	Direct children only State changes apply to the entire branch
CP Manager		N/A			
CP Report Viewer					
Org All Permission Groups	Can only view the parent CP ID and name	N/A			

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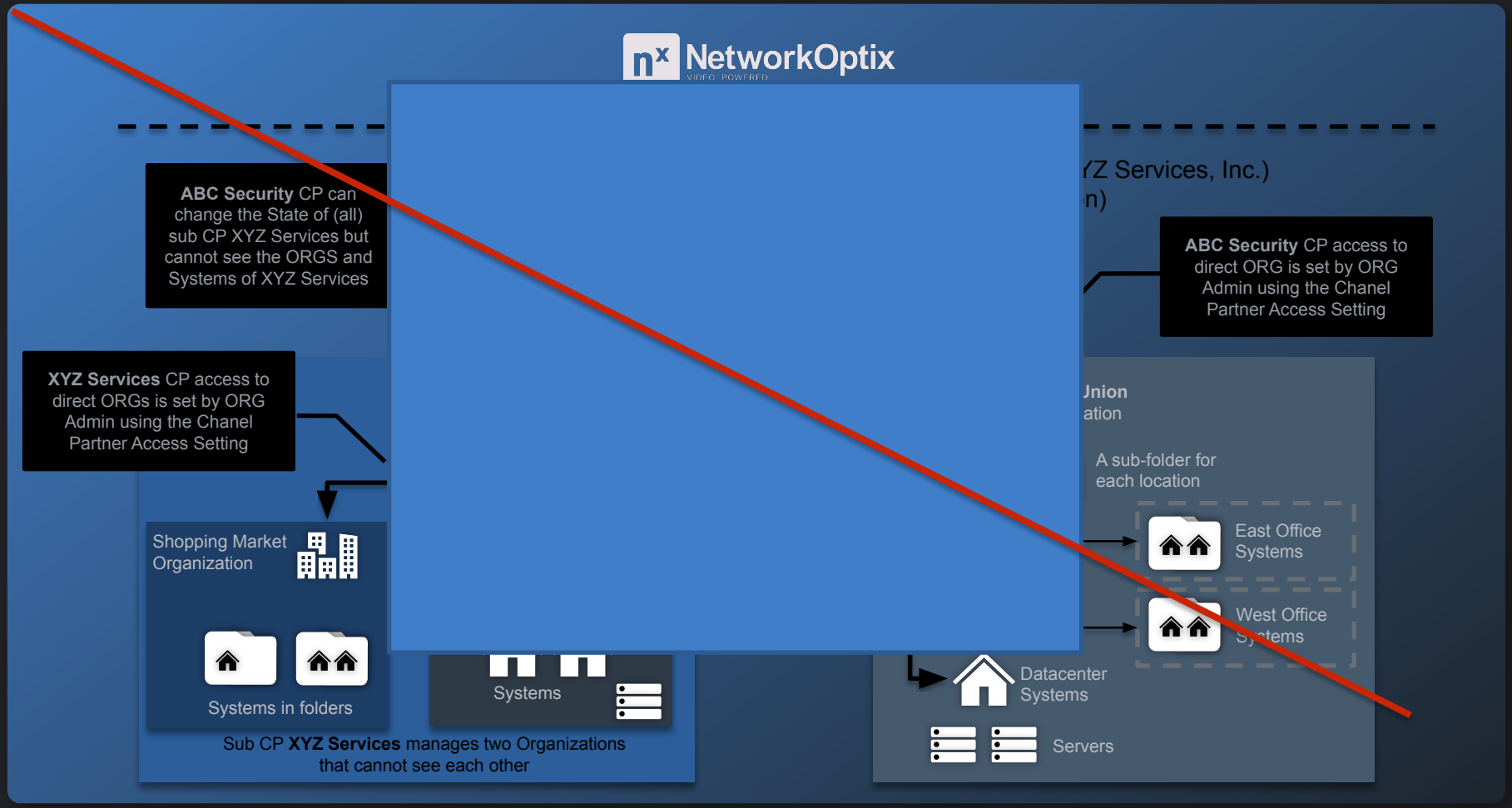
NetworkOptix
VIDEO POWERED
ABC Security CP can change the State of (all) sub CP XYZ Services but cannot see the ORGS and Systems of XYZ Services
YZ Services, Inc.)
n)
ABC Security CP access to direct ORG is set by ORG Admin using the Chanel Partner Access Setting
XYZ Services CP access to direct ORGs is set by ORG Admin using the Chanel Partner Access Setting
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ation
A sub-folder for each location
Shopping Market Organization
East Office Systems
West Office Systems
Systems in folders
Systems
Datacenter Systems
Servers
Sub CP XYZ Services manages two Organizations that cannot see each other

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Channel Partner User Interface

- Channel Partner Cloud Portal Interface
- Changes can affect information
  - Desktop Client
  - Web Admin and Cloud Portal of associated Channel Partner
- Available options vary with user login permissions

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Manage (Sub) Channel Partner Users

(Sub) Channel Partner User Types, Actions and Permissions

		Task or Action			
Group Name/ Permission Group	Permissions Granted	View CP Users	Create CP Users	Edit CP Users	Delete CP Users
CP Administrator	Manages Channel Partner settings and users Each (sub) Channel Partner requires at least one Administrator	Within Own CP	Within own CP CP Administrator must specify a sub CP Administrator when creating a sub CP	Within Own CP	
CP Manager	Manages Organizations and users that report to the Channel Partner	N/A			
CP Report Viewer	Limited to viewing Service usage reports				

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Manage Organizations

Organization Actions and Permissions

	Task or Action				
Permission Group	View an ORG	Create an ORG	Edit ORG Name	Set ORG State	Delete an ORG
CP Administrator	View all the ORGs and their settings within own CP View only ORG IDs within sub CPs	Within own CP	Within the own CP or if an ORG Administrator has granted access	Within the own CP or if an ORG Administrator has granted access Can change State of sub CP affecting the entire branch	N/A
CP Manager					
CP Report Viewer		N/A			
ORG Administrator	View all the ORGs within their Channel Partner	N/A	Edit own ORG name	N/A	
ORG Other Permission Groups		N/A			

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Demo/Lab

Try the Following:

- Create a Channel Partner
- Delete a Channel Partner
- Change the State of a Channel Partner

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