

CelloSaaS Self-Guided Live Tour

Ver. 1.0

The purpose of this Self-Guide is to help you walk through the features and modules of CelloSaaS. You will see how easy it is to manage common SaaS requirements such as,

- Customer mgmt.
- Subscription mgmt.
- Security
- Membership
- Billing & Metering
- White Label
- Workflow
- Business Rules
- Reporting
- Event System
- SaaS Notification Management

This guide addresses some of the key features from a Product Administrator/Tenant Administrator/ End User perspective. There are several features of Cello that has not been addressed as part of this guide. However, you will find the same from our website



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

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1 Introduction to CelloSaaS

CelloSaaS is a cloud ready application development framework for building Robust, Multi-Tenant, Internet Scalable SaaS and Enterprise Applications. CelloSaaS offers several pre-built modules that heavy-lifts most of the complex, non-functional requirements and operational needs of Multi-Tenant applications. ISVs and Enterprises can easily integrate the modules of CelloSaaS with their applications in a ready-to-use form like APIs, WCF services and inheritable classes. This will allow them to focus on building their business functionalities. Applications built using CelloSaaS can be hosted anywhere, from public cloud (such as amazon, azure) or private cloud, to on premise Servers.






CelloSaaS comes in two editions,

1. Business Edition (Click  [here](#) to see the complete Feature)
2. Ultimate Edition (Click  [here](#) to see the complete Feature)



This document focuses on Decision Makers, Architects and developers to get a feeler and hands on how to get started with the CelloSaaS.

2 Nomenclature

Icon	Description
	Notes icon refers to some Special instructions on a topic
	Reference icon refers to additional resources within in this document or external document to refer from.
	This icon informs click on certain links to navigate to specific page.
	Try icon refers to procedures need to be followed by the user to try and execute the step by step process
	Warning icon refers to mandatory things that needs to validated or entered in a feature.

3 Intro to Live Demo

This Live Demo Application assumes that you have built a Multi-Tenant Project Management Application integrated with Cello Ultimate Edition and hosted in some public or some on premise servers. Now let's look at various steps involved in configuring the product to make it servable to customers.

4 Step 1: Setup Product

Setting up the Product refers to the initial configurations that you have to perform in order to publish your application LIVE.

4.1 *Login as Product Administrator*

CelloSaaS preloads with an administrator user who will act as a super administrator otherwise called as Product Administrator. The Super Administrator can control the entire product behaviour such as, Onboarding Tenants, Setting up Subscriptions, configuring Merchant Billing Account and almost all the functionalities. The default username, password and privileges can be changed at any point of time.


Default Credentials (Product Administrator)

Company Code: company

Username: admin@company.com

Password: company#123 (Case Sensitive)





Click  [here](#) to read more

4.2 Access Administration Portal

To perform the initial Configurations, login as a Super Administrator. You will be navigated to the main dashboard page after the successful authentication process. This entire portal is provided out-of-the-box solution and works immediately after installation without any configuration or modification in Cello except the SQL Configuration (You have to point the application to connect to the Cello Metadata DB and application DB if required). The Cello Administration portal provides all functionalities required to manage your SaaS application. Now, you can start setting up the product.

4.3 Create Subscription

The first step of product setup is to configure the subscription packages, Click  [here](#) to read more about [Subscriptions](#). In order to configure subscriptions, the custom Modules and Features built using Cello must be registered with the framework,

Click  [here](#) for more references.

4.4 Getting Started with “Live Tour”

For the purposes of Live Tour this demo Application is preloaded with two modules namely,

- Project Management
- Task Management



For the live tour, create two packages

Navigate to Subscription >> Manage Subscriptions – Click Add Button

TRY

1. **Ultimate Package** (Include all the default modules and features as shown in the below Screenshot and do not exclude any modules. The Idea is to provide all the features and functionalities to customers who purchase the **Ultimate** package.



The below screenshot displays the custom module (Project Dashboard Module, Project Module) integrated with the framework along with the out-of-the-box modules and features.

Manage Package Details Cancel Save

Tenant Name: Company

Package Details

Package Name* Ultimate Package

Package Description* This package includes all the features and modules

Is Evaluation

Trial Period 0 days

Module Details

Assigned Modules* Un-Check All

Assignable Modules* Un-Check All

Other Modules

<input checked="" type="checkbox"/> AccessControl	<input checked="" type="checkbox"/> AccessControl
<input checked="" type="checkbox"/> Billing	<input checked="" type="checkbox"/> Billing
<input checked="" type="checkbox"/> Chart	<input checked="" type="checkbox"/> Chart
<input checked="" type="checkbox"/> Configuration	<input checked="" type="checkbox"/> Configuration
<input checked="" type="checkbox"/> Databackup	<input checked="" type="checkbox"/> Databackup
<input checked="" type="checkbox"/> Integration	<input checked="" type="checkbox"/> Integration
<input checked="" type="checkbox"/> Notification	<input checked="" type="checkbox"/> Notification
<input checked="" type="checkbox"/> Package	<input checked="" type="checkbox"/> Package
<input checked="" type="checkbox"/> Project Dashboard Module	<input checked="" type="checkbox"/> Project Dashboard Module
<input checked="" type="checkbox"/> Project Module	<input checked="" type="checkbox"/> Project Module
<input checked="" type="checkbox"/> QueryBuilder	<input checked="" type="checkbox"/> QueryBuilder
<input checked="" type="checkbox"/> Report	<input checked="" type="checkbox"/> Report
<input checked="" type="checkbox"/> Setting	<input checked="" type="checkbox"/> Setting
<input checked="" type="checkbox"/> Tenant	<input checked="" type="checkbox"/> Tenant
<input checked="" type="checkbox"/> User	<input checked="" type="checkbox"/> User
<input checked="" type="checkbox"/> Workflow	<input checked="" type="checkbox"/> Workflow

2. **Standard Package**(Include all the modules and features except Project Dashboard Module)

Manage Package Details Cancel Save

Tenant Name: Company

Package Details

Package Name: Standard Package

Package Description: features and modules except Project Dashboard Module

Is Evaluation:

Trial Period: 0 days

Module Details

Assigned Modules Un-Check All

Assignable Modules Un-Check All

**'AccessControl', 'Configuration', 'Setting', 'User' modules are mandatory all packages. For tenant hierarchy support 'Package', 'Tenant' modules are mandatory.*

Assigned Modules	Assignable Modules
<input checked="" type="checkbox"/> AccessControl <input checked="" type="checkbox"/> Billing <input checked="" type="checkbox"/> Chart <input checked="" type="checkbox"/> Configuration <input checked="" type="checkbox"/> Databackup <input checked="" type="checkbox"/> Integration <input checked="" type="checkbox"/> Notification <input checked="" type="checkbox"/> Package <input type="checkbox"/> Project Dashboard Module <input checked="" type="checkbox"/> Project Module <input checked="" type="checkbox"/> QueryBuilder <input checked="" type="checkbox"/> Report <input checked="" type="checkbox"/> Setting <input checked="" type="checkbox"/> Tenant <input checked="" type="checkbox"/> User <input checked="" type="checkbox"/> Workflow	<input checked="" type="checkbox"/> AccessControl <input checked="" type="checkbox"/> Billing <input checked="" type="checkbox"/> Chart <input checked="" type="checkbox"/> Configuration <input checked="" type="checkbox"/> Databackup <input checked="" type="checkbox"/> Integration <input checked="" type="checkbox"/> Notification <input checked="" type="checkbox"/> Package <input type="checkbox"/> Project Dashboard Module Exclude this module <input checked="" type="checkbox"/> Project Module <input checked="" type="checkbox"/> QueryBuilder <input checked="" type="checkbox"/> Report <input checked="" type="checkbox"/> Setting <input checked="" type="checkbox"/> Tenant <input checked="" type="checkbox"/> User <input checked="" type="checkbox"/> Workflow

After creating the two packages as requested above, the Package Listing page will appear as below.

Note : Assignable modules relates to a feature called **“Tenant Hierarchy”**, for this live tour just select all the features and modules from both **“Assigned”** and **“Assignable modules”**. To read more about Tenant hierarchy, click [here](#).

Tenant: Company + Add

Search GO


Name	Trial Period	Manage Price Plans	Edit
Ultimate Package	0	✎	✎
Standard Package	0	✎	✎

Show 10 entries Showing 1 to 4 of 4 entries ⏪ ⏩ 1 ⏪ ⏩

4.5 Usage assigning process

Usage Variables are the base for metering the transactions by the Tenants. These usage variables have to be identified during the time of development for each and every module based on your metering requirement.

For this live Tour App, there are two usage variables registered within the application. They are **ProjectModule Usage** and **User Usage** variables. To view the same, navigate Subscription >> Manage

Subscription >> Click  add button and select the project module and its sub features. Similarly, select the access control module and its sub features and scroll down to the bottom of the page.

Set Usage Maximum Capacity

Assigned Usage

Billing

BillingInvoiceAmount (Maximum : 0)

BillingInvoiceYTD (Maximum : 0)

ProjectModule

Project Usage (Maximum : 0)

User

User (Maximum : 0)

Assignable Usage

Billing

BillingInvoiceAmount

BillingInvoiceYTD

ProjectModule


Project Usage

User

User

Cancel Save

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While creating the subscription, setup some usage limit as per the subscriptions. When the package is subscribed by a customer and whenever a particular feature is consumed, the metering engine of Cello will continuously monitor the usage of the customer. To learn more about the Metering Engine, click  [here](#).

4.6 Create Price plans

Price plan refers to the computational logic to bill the Customer. Pricing plans are subset of subscriptions and hence a Subscription plan can have any number of Pricing Plans under it.

Example:

1. Silver Subscription

1.1. Price Plan-1

1.2. Price Plan-2

2. Gold subscription

2.1. Price Plan-1

2.2. Price Plan-2

3. Platinum Subscription:

3.1. Price Plan-1

3.2. Price Plan-2

4.7 Types of Price Plan

There are two types of Price Plans supported in CelloSaaS, They are

1. Flat Pricing

Example

In this model, a flat cost is set for a subscription; the same cost will be charged from the customer on a month on month basis or based on the frequency assigned by the Product Administrator.



Reference


Refer [Billing Cycles Topic](#) to understand more about Frequencies

	Silver	Gold	Platinum
	\$ 49	\$ 69	\$ 79
Validity	1 Year	1 Year	1 Year
Storage	1 GB	3 GB	5 GB
Blog posts/Month	2	3	5
Social Media Branding	No	No	Yes
Social Bookmarking	No	No	Yes
	Sign up	Sign up	Sign up

Version B (new)

With a flat cost, customers are required to pay the subscription cost irrespective of whether or not they use the subscription. There are no additional costs except the Tax components if any.

2. Pay as you Go

As the name implies, the subscription cost depends on the metered usage  [[Click here to understand Usage Metering](#)] of the service with or without base price.



Pay as you go model can work in two modes. They are




- a. With Base Cost
- b. Without Base Cost

For this Live Demo Tour, let's create a simple Flat Plan for easier understanding.




Navigate to Admin>> Manage Subscriptions

- Click  on Manage Price Plan icon against Ultimate Edition and create price plan of type 'Flat' with cost 199\$ [Refer below screenshot]
- Click  on Manage Price Plan icon against Standard Edition and create a price plan of type Flat with cost 99\$ [Refer below screenshot]

Name	Trial Period	Manage Price Plans	Edit
Ultimate Edition	30		
Standard Edition	0		

Show 10 entries Showing 1 to 6 of 6 entries

Package Management

- On  clicking on the “Manage Price Plan”, you will be redirected to “Price Plan Listing Page” [Refer below screenshot]



Price Plans for Basic Package

Back + Add

Plan name	Plan description	Price (USD)	Bill frequency	Skip calculation	Edit	Delete
10%off		\$125.00	Monthly	x		
Basic Plan	Basic Plan	\$149.00	Monthly	x		

Price Plan Listing Page

- Click on Add button to add a new Pricing plan for a Package (Refer the above screen).



Manage Price Plans for Basic Package

Cancel Save

Plan Name *

Plan Description

Skip Billing *

Plan Price * USD / Month

Line Items

+ Add

Base Price

Line items not yet added!

Add Price Plan

- Fill in the mandatory information and click and Save

Field	Description
Plan Name	Describes your plan. The plan will appear on the subscriber's invoice.
Plan Description	A description of the plan that will appear in the self-registration pages as well as on the subscriber's email invoice, if configured in email templates.
Plan Price	Base cost amount charged to a plan's subscribers. Click here to understand how to setup price plan with base Cost.
Skip Billing	Check this option if you don't want to use Cello's Invoicing Engine

The Configured Price Plans can be viewed in the Add Tenant Page under **Tenant >> Manage Tenants – Click Add button and scroll down**

The screenshot displays a configuration form with several sections:

- Contact Information:** Phone, Fax, Contact Email, and Country (dropdown).
- Tenant Admin User Details:** Last Name, First Name, Tenant Admin Email, User Name, Age, and User Category (dropdown).
- Package Settings:** Package (Basic Package), Subscription Start Date (1/3/2014), Trial End Date, Price Plan (dropdown menu open showing options like 10%off, Ultimate Plan, New Year Offer, Onetime25permonth, Basic Plan), Subscription End Date, and Number of Users.
- Tax Rate Table:**

Description	Name	Description	Percentage	Order
Default taxes	VAT 4%	VAT 4%	4%	0
	CST 3%	CST 3%	3%	1
	PST 5%	PST 5%	5%	2

4.8 Configure Subscription Related Notifications

CelloSaaS provides Locale aware, Multi-Tenant Notification Engine which is responsible to send out Messaging / Notifications on successful creation of Tenants, Users and other interesting events that occur within the system.

Below is the default notifications configured within the product,

Notification Name	Description
Bill Generated Notification	Sent when bill is generated on the billing day.
Forgot Password Mailer	Forgot Password Mailer
Payment Failure Notification	Sent when the tenant has auto debit enabled and aut...
Payment Success Notification	Sent when the tenant has auto debit enabled and gen...
Pre-Subscription End Notification	Sent before Subscription ends.
Pre-Trial End Notification	Sent before trail ends.
Reset Password Mail	Reset Password Mail
Subscription Ended Notification	Sent when Subscription ends.
Task Assigned Mail	Sent when task is assigned to employee

Task Status Mail	Sent when task was accepted/rejected by employee
Tenant Activation Mail	Tenant Activation Mail
Tenant License Activation Mail	Sent when admin activates tenant license via UI.
Tenant License Deactivation Mail	Sent when admin deactivates tenant license via UI ...
Tenant Rejected Mail	Sent when parent tenant rejects the skip level ch...
Tenant Subscription Changed Mail	Sent when tenant updates the subscription package.
Tenant Welcome Mail	Sent when tenant clicks activates link or admin ap...
Trail Ended Notification	Sent when trail ends.
Un Paid Bills Alert Notification	Admin will send this manually from Search bills UI...
User Confirmation Mailer	Sent when new user is created within the application
User Password Mailer	Sent when user change his/her password

My Account
Subscription
Tenant
Access Control
Configuration
Business Events
Notifications
Workflow
Reporting
Monitor

Manage Notification Details Tenant: Company Company Add

Search GO

Notification Name	Description	Manage Dispatch	Manage Global Dispatch	Edit	Delete
Bill Generated Notification	Sent when bill is generated on the billing day.	☑	☑	✎	🗑
Forgot Password Mailer	Forgot Password Mailer	☑	☑	✎	🗑
Payment Failure Notification	Sent when the tenant has auto debit enabled and aut...	☑	☑	✎	🗑
Payment Success Notification	Sent when the tenant has auto debit enabled and gen...	☑	☑	✎	🗑
Pre-Subscription End Notification	Sent before Subscription ends.	☑	☑	✎	🗑
Pre-Trail End Notification	Sent before trail ends.	☑	☑	✎	🗑
Subscription Ended Notification	Sent when Subscription ends.	☑	☑	✎	🗑
Tenant Activation Mail	Tenant Activation Mail	☑	☑	✎	🗑
Tenant License Activation Mail	Sent when admin activates tenant license via UI.	☑	☑	✎	🗑
Tenant License Deactivation Mail	Sent when admin deactivates tenant license via UI ...	☑	☑	✎	🗑
Tenant Rejected Mail	Sent when parent tenant rejects the skip level ch...	☑	☑	✎	🗑
Tenant Subscription Changed Mail	Sent when tenant updates the subscription package.	☑	☑	✎	🗑
Tenant Welcome Mail	Sent when tenant clicks activates link or admin ap...	☑	☑	✎	🗑
Trail Ended Notification	Sent when trail ends.	☑	☑	✎	🗑
Un Paid Bills Alert Notification	Admin will send this manually from Search bills UI...	☑	☑	✎	🗑
User Confirmation Mailer	User Confirmation Mailer	☑	☑	✎	🗑
User Password Mailer	User Password Mailer	☑	☑	✎	🗑


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4.9 Customize Notification Content



Each of this notification has content template attached to it.

Step 1:
























































In order to customize the content click  on **Manage Dispatch** icon.

CelloSaaS admin@company.com | Change Tenant


My Account | Subscription | Tenant | Access Control | Configuration | Business Events | Notifications | Workflow | Reporting | AddOn | Monitor

Manage Notification Details Tenant: Company Add

Search

Notification Name	Description	Category	Manage Dispatch	Manage Global Dispatch	Edit	Delete
Bill Generated Notification	Sent when bill is generated on the billing day.	-				
Forgot Password Mailer	Forgot Password Mailer	-				
On Employee Creation Email	Email sent on creating a new Employee	Employee Management		-		
Payment Failure Notification	Sent when the tenant has auto debit enabled and aut...	-				
Payment Success Notification	Sent when the tenant has auto debit enabled and gen...	-				
Pre-Subscription End Notification	Sent before Subscription ends.	-				
Pre-Trail End Notification	Sent before trail ends.	-				
Project Upload	Uploading a File on creation of a Project	Project Module				
Report Upload	Upload Weekly Sales Report to FTP	Reports				
Reset Password Mail	Reset Password Mail	-				
Subscription Ended Notification	Sent when Subscription ends.	-				
Tenant Activation Mail	Tenant Activation Mail	-				
Tenant License Activation Mail	Sent when admin activates tenant license via UI.	-				
Tenant License Deactivation Mail	Sent when admin deactivates tenant license via UI ...	-				

Step 2:

Click  on Override Details button (Refer the below screen)

Trail Ended Notification	Sent when trail ends.				
Un Paid Bills Alert Notification	Admin will sent this manually from Search bills UI...				
User Confirmation Mailer	User Confirmation Mailer				
User Password Mailer	User Password Mailer				

Show 25 entries Showing 1 to 17 of 17 entries

Manage Email Dispatch Details : Forgot Password Mailer [Override Details](#) [Cancel](#)

Notification Type **Email**

Sender Address	cellosaasdemo@gmail.com	Smtip Address	smtp.gmail.com
Smtip UserName	cellosaasdemo@gmail.com	Smtip Password	*****
Port Number	587	Enable SSL	True

Email Content Details

Subject	{{tenantname}} - Forgot Password	Attachment Folder	
Attachment files		Template Name	Forgot Password Template
Template Rule Set			

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Un Paid Bills Alert Notification	Admin will sent this manually from Search bills UI...	-		-	-
Upload Files	Upload Files	Upload Files		-	-
Upload Reports to FTP Server	Report Upload	Report Upload		-	-
User Confirmation Mailer	User Confirmation Mailer	-		-	-
User Password Mailer	User Password Mailer	-		-	-

Show 25 entries Showing 1 to 23 of 23 entries

Manage Email Dispatch Details

Notification Type **Email**

Sender Address*	<input type="text" value="cellosaasdemo@gmail.com"/>	Smtip Address*	<input type="text" value="smtp.gmail.com"/>
Smtip UserName*	<input type="text" value="cellosaasdemo@gmail.com"/>	Smtip Password*	<input type="password" value="*****"/>
Port Number*	<input type="text" value="587"/>	Enable SSL	<input checked="" type="checkbox"/>


Email Content Details


Subject*	<input type="text" value="Password Confirmation Mail"/>	Attachment Folder	<input type="text"/>
Has Template	<input checked="" type="checkbox"/>	Attachment files	<input type="text"/>
Template Rule Set	<input type="text"/>	Default Template*	<input type="text" value="--Select--"/>

[Save](#) [Cancel](#) [Clear](#)

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Step 3:

Click  on Save to store the customization. You can repeat the process for all the other notifications that you would like to update with your own SMTP details.

In order to update the content of a given notification template, click  the icon next to Default Template in the above screenshot to open up the Notification Content Manager (Refer the below screen).

Benefits of Notification Content Manager

1. Support multiple Locales
2. Support for Dynamic Place Holders (Entity/XML)
3. Tenant specific Customizable content
4. Support for HTML

CelloSaaS

admin@company.com | Change Tenant

My Account Subscription Tenant Access Control Configuration Business Events Notifications Workflow Reporting Monitor

Manage Templates : Bill Generated Template Add Back

Search GO

Locale Name	Template Content	Edit Details	Delete Details
en	Dear {{Tenant.ContactDetail.FirstName}} {{Tenant.C...		

Show 10 entries Showing 1 to 1 of 1 entries

Edit Template Details

Locale Name en

Template*

B *I* U **ab** **x** **x'** **T** **HT** **T**

Dear{{Tenant.ContactDetail.FirstName}} {{Tenant.ContactDetail.LastName}}
Your bill #{{Invoice.InvoiceNo}} for the period {{Invoice.StartDate}} to {{Invoice.EndDate}} with the Net Amount of \${{Invoice.Amount}}
USD has been generated.

Payment will be made automatically if you have registered the payment account details.

Thank you for using CelloSaaS.

Regards,
CelloSaaS Admin

Save Cancel

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4.10 Open Packages for Self-Registration

Self-Registration is an open Portal for end customers preferring to register/on-board themselves in Self Service Mode. Self-Registration acts like a Product Catalogue allowing Users to select a particular Subscription from the listed catalogue and register themselves.

Using Cello’s self Service Portal, a Product Administrator can selectively choose the package to be available in the Self Service Portal. The Business application can contain any number of Subscription plans, but the Application Administrator has the control to mark selected packages for self-registration purpose. When marked for Self registration, the selective packages alone are displayed in the self-registration process. End customers will be able to subscribe to these subscriptions plans and use the modules and features of these plans.

Refer to the examples displayed below:

Example 1

BASIC Free	SELECT Rs 690 per month <small>SAVE with an annual plan</small>	GOLD Most Popular Rs 8,990 per year	PLATINUM Rs 22,990 per year
Sign Up »	Sign Up »	Sign Up »	Sign Up »
Features include:	BASIC features +	SELECT features +	GOLD features +
10 questions per survey 100 responses per survey	Unlimited questions 1,000 responses per month* <small>* Rs 5 per additional response</small>	Unlimited questions Unlimited responses	Unlimited questions Unlimited responses
Easy-to-use web-based survey tool	Custom survey design & URLs	Custom redirect after survey is completed	Complete brand control with Research.net
Collect data via weblink, email, Facebook , or embed on your site or blog	Enhanced security (SSL/HTTPS) included	Advanced logic features:	<ul style="list-style-type: none"> Your own research.net survey URLs You control how your survey looks including adding your logo & brand colors You decide where your respondents go after they complete your survey
Real-time results	Skip-logic & other advanced features	<ul style="list-style-type: none"> Random assignment for A/B testing Question & answer piping Question randomization or flipping 	Expert phone support to answer any of your questions
24x7 email customer support	Excel export & printable PDF	Text analysis for open responses	
See all features...	See all features...	See all features...	See all features...

Example 2

Flat-rate prices. All features included. Unlimited use. No overage charges. Participants always connect for free.

Basic	Professional	Team MOST POPULAR	Enterprise
1 host	1 host	unlimited hosts	unlimited hosts
3 participants per session	25 participants per session	25 participants per session	25 participants per session
1 session channel	1 session channel	1 session channel	3 session channels
\$13 per month <small>(\$156 paid annually)</small>	\$19 per month <small>(\$228 paid annually)</small>	\$39 per month <small>(\$468 paid annually)</small>	\$78 per month <small>(\$936 paid annually)</small>
pay annually ▾	pay annually ▾	pay annually ▾	pay annually ▾
<small>Select 'one-time payment' and get a lifetime plan – no recurring fees!</small>	<small>Select 'one-time payment' and get a lifetime plan – no recurring fees!</small>	<small>Select 'one-time payment' and get a lifetime plan – no recurring fees!</small>	<small>Select 'one-time payment' and get a lifetime plan – no recurring fees!</small>
Choose Plan	Choose Plan	Choose Plan	Choose Plan

Support

4.11 Configure Ultimate and Standard packages for self-registration



TRY



The product owner can mark selective or all packages to be subscribed in the Self Registration model. To display the Ultimate and Standard edition for the Self Registration mode, navigate to Admin >> Configuration >> Manage Pickup Lists

“Self-Registration Packages” is a pickup list which is specially meant for exposing the selective packages for Self Registration portal, so in order to add/remove package, click on manage values icon against the “Self Registration Packages”



Do not create a separate custom pickup list to expose the packages for Self Registration portal

CelloSaaS admin@company.com | Change Tenant

My Account Subscription Tenant Access Control Configuration Business Events Notifications Workflow Reporting Monitor


Manage Pickup List Tenant: Company Add

Search

Name	Edit	Activate/Deactivate	Manage Values
Company Size			
Self Registration Packages			

Show 10 entries Showing 1 to 2 of 2 entries

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
1. Click  on Manage Values

The screenshot shows the CelloSaaS dashboard with a navigation bar containing icons for My Account, Subscription, Tenant, Access Control, Configuration, Business Events, Notifications, Workflow, Reporting, and Monitor. The main content area is titled 'Self Registration Packages Pickup List Values' and includes a search bar and a table with the following data:

Value	Name	Description	Edit	Activate/Deactivate
17a1c258-8426-e311-bea5-7845c443373d	Basic Package	Basic package with 30 days trial		
26f64c60-8426-e311-bea5-7845c443373d	Use & Pay Package	Usage based billing package		
c6e1a25f-9726-e311-9437-2200aa460e7	Evaluation Package	Evaluation Package		

At the bottom of the table, it says 'Show 10 entries Showing 1 to 3 of 3 entries'.

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- Click  on Add to add more subscriptions

The screenshot shows the CelloSaaS dashboard with the 'Add Pickup List Value' form open. The form has the following fields:

- Value*
- Name*
- Description

Buttons for 'Cancel' and 'Add' are located at the bottom right of the form.

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- Add the following details
 - Package ID** in **Value** Field (You can get the package ID from the package you created as shown in the below screenshot)
 - Name of the **Package** and its **Description** and click Save

CelloSaaS admin@company.com | Change Tenant

Manage Package Details [Cancel] [Save]

Tenant Name: Company

Package Details Navigate to Subscription Listing page and click on any one of the package to open in edit mode

Package Name* Basic Package Package Description* Basic package with 15 days trial

Reference Id 17a1c258-8426-e311-bea5-7845c443373d

Is Evaluation Trial Period 15 days

Module Details

Assigned Modules* [Check All]

Other Modules

- AccessControl
- Billing
- Chart
- Configuration
- DataBackup
- Integration
- Notification
- Package
- QueryBuilder
- Report
- Setting
- Tenant
- User
- Workflow

Assignable Modules* [Check All]

Other Modules

- AccessControl
- Billing
- Chart
- Configuration
- DataBackup
- Integration
- Notification
- Package
- QueryBuilder
- Report
- Setting
- Tenant
- User
- Workflow

Feature Details

Assigned Features* [Check All]

AccessControl

- ManageAllRole
- ManageRole
- ManageRoleFeatures
- ManageRolePrivileges
- ManageUserRoles
- TenantAccessFeature

Billing

- Manage Invoice
- Manage Price Plan

Chart

- ManageChart
- ManageChart

Configuration

- Manage Audit
- ManageDataViewExtn
- ManageEntityExtn
- Manage Events
- Manage Module Configuration
- ManagePickupList
- Manage Rules
- ManageSettingTemplate
- ManageTenantSettingsTemplate

Notification

- Manage Notification

QueryBuilder

- ManageQuery

Assignable Features* [Check All]

No Features Available.

Navigate to Self-Registration Page

To see the self-registration packages in action, Logout from the system, and click on **Register** hyperlink (Refer below screenshot)



A screenshot of a login form titled 'Login'. It contains three input fields: 'Company Code *', 'User Name *', and 'Password *'. Below the password field are links for 'Forgot Password?' and 'Register'. A 'Login' button is located at the bottom right.

Refer the below screenshot for the Self Registration page. This page is completely customizable and configurable. You can change the look and feel, append fields etc.

Get started today!

A screenshot of the 'Self Registration Packages' page. On the left, under 'Choose a Plan', there are three package cards: 'Basic Package' (\$125.00 Monthly), 'Evaluation Package' (\$0.00 Monthly), and 'Use and Pay Package' (Usage based billing package, USAGE CHARGES Monthly). A red box highlights these three packages, with a red arrow pointing to the text 'Self Registration Packages'. On the right, under 'Enter Company Information', there is a form with fields for 'Company Code String *', 'Company Name *', 'Company Size *' (dropdown), 'First Name *', 'Last Name *', 'Email *', and 'Phone *'. A 'Register' button is at the bottom.

5 Tenant Registration Process

Tenant Registration refers to on boarding new Tenants into the application. CelloSaaS facilitates on-boarding Tenants in 2 ways:

- Self- Registration
- Using Admin Dashboard

5.1 On-board Tenants using Self Registration

Similarly Onboarding new customer without using the Admin User Interface can be done using the Service Portal provided out of the box along with Administration portal.

Now let's create the second Tenant using Self Registration Portal.



TRY

plan for the

Step 1: Navigate to the Login screen and click on the Registration link.

Step 2: Create a tenant named **"DallasInc"** and fill in all the required details about the customer and subscribe to **"Ultimate Edition"**



While creating a tenant using Self Registration portal, the first available pricing chosen subscription would be allocated to the Tenant.

CelloSaaS

Get started today!

Choose a Plan

Basic Package Basic package with 15 days trial \$149.00 Monthly	Evaluation Package 30 days evaluation package. \$0.00 Monthly
Use and Pay Package Usage based billing package USAGE CHARGES Monthly	

Enter Company Information

Company Code String *

Company Name *

Company Size *

First Name *

Last Name *

Email *

Phone *
e.g.: +1-234-567-8901 or +1 (234) 56 89 901

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Note: Tenants registered via Self Registration portal, the tenant will be put on Inactive Status by default, and the product owner must activate the tenant by navigating through the Manage Tenant page.

1. Navigate to Tenant and click on Manage Tenant Details
2. Choose approved Tenants and click on activate

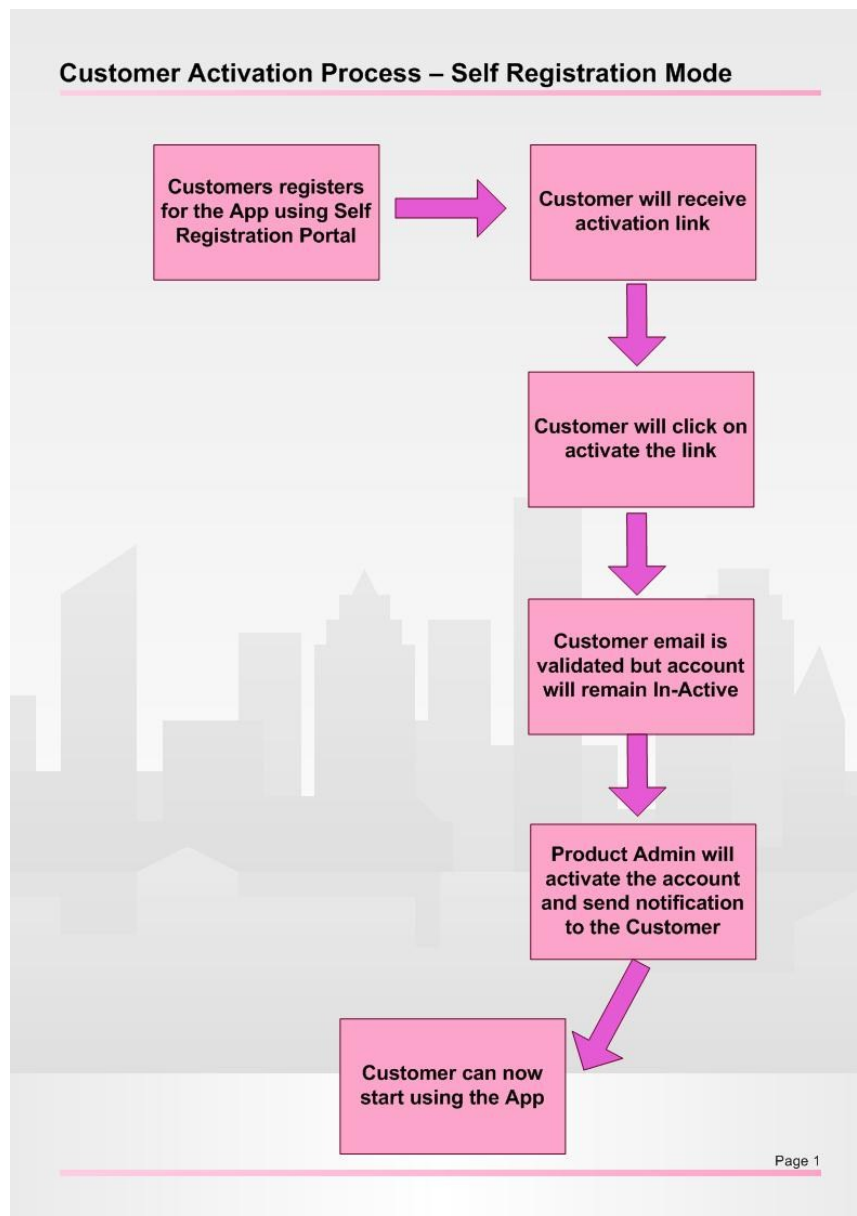
My Account Subscription Tenant Access Control Configuration Business Events Notifications Workflow Reporting AddOn Monitor

Tenant Management Tenant: CompanyIII +Add

Approved Tenants Unapproved Tenants Tenant Density Graph

Tenant Code String	Tenant Name	Description	Website	ApprovalStatus	Created On	Activate	Reject
Birlasoft	Birlasoft			WaitingForApproval	11/25/2013 6:46 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ezsoft	Ez Soft			WaitingForApproval	10/23/2013 10:59 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Activation Flow



5.2 Add Tenant

This is a standard way of on boarding new tenants in CelloSaaS where the administrator of the product fill the details of the tenants and provide appropriate software package and pass on the credentials to the tenant and allow him to use the Software.

Product admin should provide the necessary details such as Tenant, contact, address, administration, package details. Product admin should select any one of the package for tenant, based on their need.



- A Tenant can only hold only one package at a time.
- Optionally, a separate subdomain can be allocated for each tenant upon creating a new tenant via new Tenant creation page (Refer below Screenshot).

CelloSaaS admin@company.com | Change Tenant | Change Tenant

Home My Account Subscription Tenant Access Control Configuration Management Manage Events Notifications Workflow Reports Monitor Monitor

Add Tenant Cancel Save Cancel Save

Tenant Details

Tenant Code String * AcmeCorp

Description Acme Corporation, a manufacturing industry specialized in manufacturing

URL http://acmecorp.yourproduct.com

Auto Debit

Company Size * 1-1000

Tenant Name * Acme Corp

Website http://www.acmecorp.com

Tenant Types * SMB

Data Partition Primary

Billing Address

If any field for Billing Address is filled in, the mandatory check will be enforced.

The “AcmeCorp” customer can now access your application using <http://acmecorp.yourproduct.com>, so when the customer login, the authentication screen will look like below

ACME Corp

Cello's SaaS Lifecycle Management Solution

Customer

Renew and Upgrade: Set Upgrade, Subscription Renewal, Trial Period Upgrades

Create Subscription: Usage Based Subscription Plan, Trial plans and Periods, Price Plans

On-board Customers: Self Registration, Tenant Provisioning, Customer Management

Configure Customer: Configure Logo/Themes, Configure Workflow/Business Rules, Setup Data Partition

Setup Customer Security

Setup

Monitor and Control: Audit User Events/Usages, Product Analytics, Tenant based Data backup

Bill/Track Payment: Collect payment details, Invoice generation, Dunning alerts and reminders

Permit User Access

Login

User Name * Bela

Password *

Forgot Password? Register

Login

No Tenant ID is validated

While provisioning Tenant, the administrator can set the number of users that can be created by the tenant. If number of users is set null, then tenant can have unlimited number of users. If the user count is set, then tenant cannot create users beyond the set limit.

Example: If the Product administrator set a user limit of say 10 users for AcmeCorp, the **AcmeCorp** customer will only be allowed to create up to 10 users under their account.

For this Tour, Lets create one Tenant using Admin Dashboard and another Tenant using Self Registration Portal.

Note: Create the Tenant using Admin Dashboard

Step 1: Navigate to Tenant>> Manage Tenant >> Add

Step 2: Create a Tenant named “AcmeCorp” and fill in all the required details about the customer and subscribe to “Standard Edition” and “Standard Pricing Plan -1”



Tenant Details

Tenant Code String: Tenant Name:

Description: Website:

URL: Tenant Types:

Auto Debit:

Billing Address

Address: City:

State: Country:

Postal Code:

Contact Details

First Name: Last Name:

Phone: Fax:

Contact Email:

Tenant Admin User Details

First Name: Last Name:

User Name: Tenant Admin Email:

Package Settings

Package: Price Plan:

Subscription Start Date: 10/3/2013 Subscription End Date:

Trial End Date: Number of Users:

Tax Rate

Description	Name	Description	Percentage	Order
Default taxes	VAT 4%	VAT 4%	4%	0

Add Tenant Screen

Once the tenant is created successfully, the **Tenant Admin role** will be assigned to Tenant instantly.

6 Step 2: Tenant Process

6.1 Login as “AcmeCorp” - the Tenant 1



- Enter Company Code, Username and Password to login as “**AcmeCorp**” tenant.
- Now you are logging in as the Tenant Administrator of “AcmeCorp” Tenant using <http://acmecorp.yourproduct.com>. Once you logged in, you can see all the menus and Features provisioned in “Ultimate Package”.

User identity

Home Admin

WelCome to sample app

User Information

Name: Jhon.Michael	UserID: e404a405-8e6c-e311-a964-000c29c8e241
Email ID: jhon.michael@gmail1.com	Tenant Code: da04a405-8e6c-e311-a964-000c29c8e241

Setting

Roles

1)GR\$Tenant_Admin

As soon you login as the Tenant Admin, you will be redirected to home page where it displays the following Details, they are

- User Information
 - Name of the User
 - UserID
 - EmailID
 - Tenant Code
- Settings (If Any)
- Roles – The Logged in User mapped with (In this Case – Tenant Admin Role)

6.2 White Labelling

White Labelling refers to customizing the Logo and Themes as per Tenant requirement.



The Themes dropdown in the Account Settings page will list out all the Themes available in the Application **App_Themes** Folder. In order to add Additional Themes developers are requested to design their own Themes and load it in **App_Themes** Folder.

Navigate to My Account >> Account Settings

tenant Name * Acme Corp Description

Website http://www.acmecorp.com Company Size * 1-100

First Name * Belva Last Name * Majewski

Email * belva.majewski@techcello1.com Phone Number * +1-903-766-2159
e.g.: +1-234-567-8901 or +1 (234) 56 89 901

Billing Address

Address 1 * Address Address 2

City * City State * State

Country * Qatar Zip Code 21597

Settings

Theme CelloSkin

Logo CelloSkin OrangeSkin

ACME Corp

Save



For this Live Tour, Try to setup “**CelloSkin**” for Acme Corp and “**OrangeSkin**” for Dallas Inc., along with configuring Themes, try setting up different Logos for “AcmeCorp” and “DallasInc”

6.3 Current Bills



Current Bills refers to the Active Bills/invoices yet to be paid by the respective Tenant for the current month (Vary based on the Billing Frequency opted).

Navigate to Admin >> My Account >> My Bills


My Bills page will display the following Details

- Account Summary
- Current Bill Statement
- Current Bill Charge Details (Break Up)
- Previous Bills
- Bill Reports
- Usage Statistics

My Bills

Account Summary						
Tenant Name	AcmeCorp  admin@acmecorp.com  +1-234-567-8901				Total Bills	0
Package <small>View History</small>	Reseller Plan				Total Amount	\$0.00
Price Plan	Reseller - Price Plan				Total Paid	\$0.00
Subscription Period	12/13/2013 5:22 AM				Overdue Amount	\$0.00

Current Bill Statement View Download						
Previous Balance	Invoice No#	Bill Period	Invoice Date	Bill Amount	Total Amount Payable	Due Date
\$0.00	1788	12/15/2013 - 1/15/2014	1/7/2014	\$1,134.87	\$1,134.87	1/20/2014

Current Bill Charge Details			Previous Bills
Item Name	Description	Amount	 Previous bill are not available!
Reseller Plan - Reseller - Price Plan	Period: 12/15/2013 12:00 AM to 1/15/2014 12:00 AM	\$999.00	
VAT 4%	VAT 4%	\$39.96	
CST 3%	CST 3%	\$31.17	
PST 5%	PST 5%	\$53.51	
EST 1%	EST 1%	\$11.24	

6.4 Create tenant specific Roles

When a new Tenant gets created, a user with Tenant Administrator Role also gets created by default. This Administrator has been given with privileges to manage the entire application (Depends on the Subscription purchased by the Tenant), this admin user can then go ahead and create additional Roles and Users thereafter.

- Navigate to Admin >> Access Control >> Manage Roles >> Add

-
- For this Live Tour, The product administrator has already created 3 Global Roles namely “Project Manager”, “Project Owner” & “Employee”.
- The Privileges granted to these Roles are Listed below

Project Manager	<p>View/Create/Update Delete Projects</p> <p>View/Create/Update Delete Tasks</p> <p>Assign Task to Employee</p> <p>View Project Dashboard</p>
-----------------	---

Project Owner	<p>View Projects/Tasks assigned</p> <p>View Project Dashboard</p>
---------------	---

Manage Privileges

Role Name: **ProjectOwner**

Module: --All--

Features: --All--

Assigned Privileges

- SelectAll
- Search EmployeeTask (Description: user can search their EmployeeTask list)
- Search Project (Description: user can search their Project list)
- View Project Dashboard (Description: View Project Dashboard)
- View User (Description: Can view user details)

Employee

View Tasks assigned

Accept/Reject the Tasks

Manage Privileges

Role Name: **Employee**

Module: --All--

Features: --All--

Assigned Privileges

- SelectAll
- Complete Task (Description: Employee can complete their task list)
- Reject Task (Description: Employee can reject their task list)
- Search EmployeeTask (Description: user can search their EmployeeTask list)
- Search Project (Description: user can search their Project list)
- Update TaskStatus (Description: user can update their EmployeeTask list)
- View EmployeeTask (Description: user can view their EmployeeTask list)
- View User (Description: Can view user details)

- When the new Tenant (AcmeCorp) was created, these Global Roles was automatically copied into the Acme Corp Tenant, hence Tenant Administrator need not create these Roles again, but the Tenant Administrator can Grant/Revoke the Access to these Roles any point of Time.



Local Roles are Roles which are created by the tenants and not Roles which come from the Application by default.

Properties of Role Management Screen

- Role Name and Description are mandatory inputs
- Role Name should be unique within tenant and should not be a Global Role Name

- Role Name should not contain special characters except _ and -
- Role Id is auto generated
- On checking the “Is Global ” property will make the Role Global



- For this tour, just navigate to the Roles Page and make sure all the three Global Roles are in Place for “**AcmeCorp**” and relevant Privileges are granted.
- Create a Local Role (Roles which are created by the Respective Tenant Admin) named “**Project Lead**” and Grant Privileges to reject the tasks (The privileges are View EmployeeTask- To Allow the user to view the Employee Task, Search EmployeeTask - To Allow the user to search the Employee Task, Search Project - To Allow the user to view the Project Details, Search ProjectTask - To Allow the user to view the Project Task, View User- To Allow the user to view the User details, Update Task - To Allow the user to update the task status)
- Revoke the “Reject Task” Privilege from the “Employee Role”, so that employee doesn’t get the option to reject a task by himself.

6.5 Create Users and assign Roles

The next logical step after creating Role is creating Users. To Create Users, Navigate to Admin >> Access Control >> Manage Users >> Add



Any user with access to User Management related Privilege is allowed to Create/Edit/Delete user in the application.

ACME CORPORATION Trial ends in 11 days Daniel.Matthews

Home My Account Subscription Tenant Access Control Configuration Management Manage Events Notifications Workflow Reports AddOn Monitor

User Management




Search User Name Add Un-Lock Un-Lock All Lock Lock All Reset Password Force Password Reset

First Name	Last Name	User Name	Email Id	IsLocked	Edit	Deactivate	Activate	Manage Roles
Daniel	Matthews	Daniel.Matthews			<input checked="" type="checkbox"/>	<input type="radio"/>		
John	Michael	John.Michael	john.michael@gmail.com		<input checked="" type="checkbox"/>	<input type="radio"/>		
John	David	John.David	john.david@gmail.com		<input checked="" type="checkbox"/>	<input type="radio"/>		
Sammer		Sammer	sammer@gmail.com		<input checked="" type="checkbox"/>	<input type="radio"/>		

Show 1c entries Showing 1 to 4 of 4 entries


User Management

Add User

- Fill in the mandatory details and Click  **Submit** to create a new user.
 - Enter required details about the user and click  on **Submit** to create a new user.
- 
- First Name, User Name, Address, City, State, Country are Mandatory.
 - Email id is unique

6.6 User Activation Process


When a new user is created via Admin Dashboard, the respective user will receive an email along with an activation link (If and only the email ID was provided while creating the user), if the email id was not provided, a common password i.e. “**company#123**” will be assigned to the user (configurable).

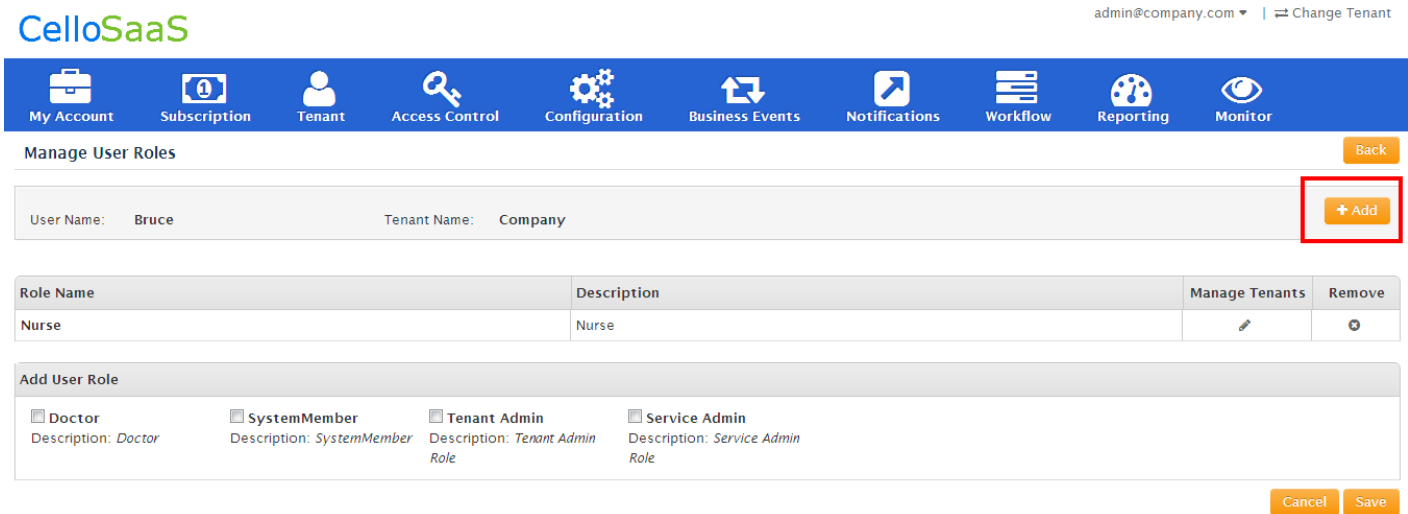
In Case of valid email id given during the User creation Process, an activation email will be sent to the respective email; the user has to activate the account by clicking  on the email link received.

The activation mail content can be configured by going to Admin >> Notifications>> Content Template >> and refer to “Password Mailer Template”.

6.7 Assigning Roles

Assigning roles to user is the final activity, once the roles and users are created.

- Navigate to Access Control → Select the user → Click  on Manage Roles



admin@company.com | Change Tenant

My Account Subscription Tenant Access Control Configuration Business Events Notifications Workflow Reporting Monitor

Manage User Roles Back

User Name: Bruce Tenant Name: Company + Add

Role Name	Description	Manage Tenants	Remove
Nurse	Nurse		

Add User Role

Doctor Description: Doctor


SystemMember Description: SystemMember

Tenant Admin Description: Tenant Admin Role

Service Admin Description: Service Admin Role

Cancel Save

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- Check the roles of the user to be mapped and click  Save.



The user can be mapped with more than 1 role at a time.

Include Try image here

- Create 3 Users namely “Sam”, “Daniel”, “Mary” and Assign them to the Global Roles namely “Project Manager”, “Project Owner” & “Employee”.
- Create 4th user named “Vincent” and assign the local Role i.e. “**Project Co-Ordinator**” Role


6.8 Configure Pickup List

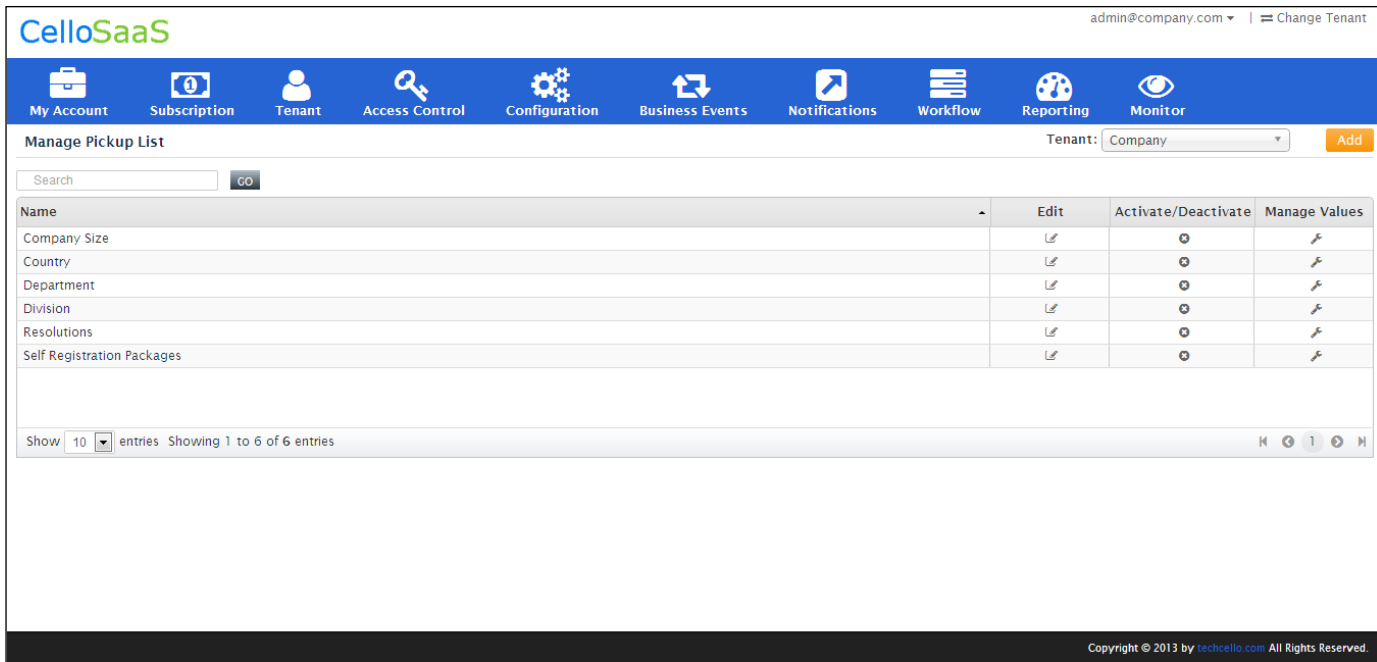
Pickup List is one of the features related to managing Master Data in the Application. Using Pickup list Tenant Administrators can manage Key Pair Values/ Dictionary values simply and effectively. These data can then be used as the master data for Loading Dropdowns or populating other datasets.



















6.9 Add Pick up List

Pickup list Feature is provided out of the box with no code level configuration or changes required.

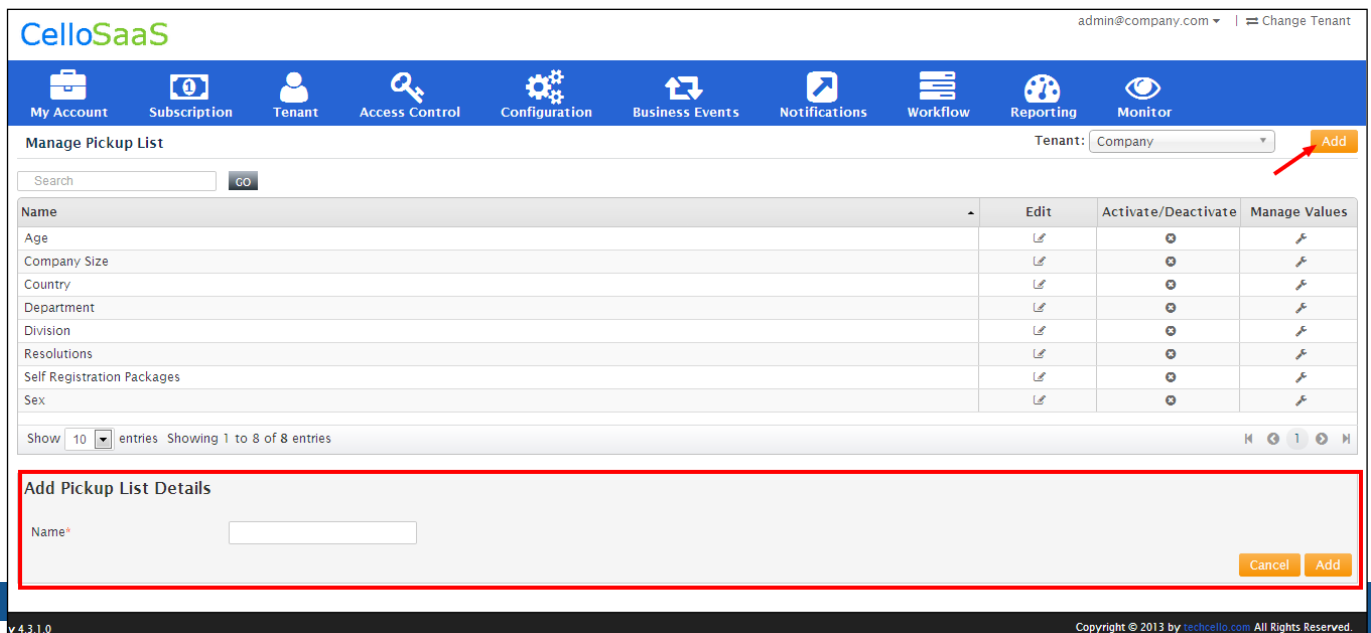


























- Navigate to Configurations → Manage Pickup Lists
- Click  on Add link to add a new Pick List as shown in the below Screenshot



Name	Edit	Activate/Deactivate	Manage Values
Company Size			
Country			
Department			
Division			
Resolutions			
Self Registration Packages			

The name of the Pick List will be displayed in the label of the pickup list. Once the pickup list is created using the above form, then you can add their key-pair values by clicking on the Manage Values icon. After entering the Key-Pairs for the pickup list, specify whether the values are displayed in alphabetical order.



Name	Edit	Activate/Deactivate	Manage Values
Age			
Company Size			
Country			
Department			
Division			
Resolutions			
Self Registration Packages			
Sex			



You can edit pickup lists even when the fields are in production. Beware of the potential implications of this action. Make sure to provide a unique name for each pickup list to uniquely identify them later. Avoid specifying a global pickup list name.

7 Step 3: Tenant Functions

7.1 Login as user with role - Project Manager

When you login as “**Project Manager-Sam**”, you can see the below menu (Refer below Screenshot). If you could just recall, The “Project Manager” has Access to the following functions, they are

- View/Create/Update Delete Projects
- View/Create/Update Delete Tasks
- Assign Task to Employee
- View Project Dashboard

Home Admin

WelCome to sample app

User Information

Name: Jhon.Michael UserID: e404a405-8e6c-e311-a964-000c29c8e241
Email ID: jhon.michael@gmail1.com Tenant Code: da04a405-8e6c-e311-a964-000c29c8e241

Setting

Roles

1)GR\$Tenant_Admin

Based on the given access, the “**Project Manager**” can see “Project Dashboard”, “**Project**”, “**Task**” menu on the top.



Displaying and hiding of these menu is completely based on Security setup configured in the security configuration (combination of Design & Runtime Configuration), Cello’s 360° Security framework takes care of the following aspects, they are

1. Avoiding tenants from features and modules which they haven’t subscribed to
2. Applying page level security
3. Applying functional security

4. Applying data level security
5. Applying business level security
6. Applying service level security

7.2 How to Create a Project

To create a project, login as “Sam” the Project Manager Role and navigate to Project Page.

CelloSaaS Zack ▾

Home Project Task

Manage Project

Search GO

Project Owner	Name	Description	Start Date	End Date	Edit	Delete	Create Task	Assign Task
Sam	Test Project1	Test Project1	1/31/2014 12:00:00 AM	2/28/2014 12:00:00 AM			+	
Sam	Test Project	Test Project	1/9/2014 12:00:00 AM	1/30/2014 12:00:00 AM			+	

Show 10 entries Showing 1 to 2 of 2 entries

Add Project

Project Owner: Sam

Name: Test Project2

Project Type: Open Source

Description: Test Project

StartDate: 1/31/2014

End Date: 2/22/2014

Status:

Reset Add



TRY

- Create a Project1 by assigning to a “Project Owner1” – “Dave”
- Create a Project2 by assigning to a “Project Owner2” – “Barry”



Refer [this](#) section on how to create projects using Project Page

7.3 Login as Project Owner

Project owner Role has been granted to access the Project Dashboard menu only, so his menu will look something like below.

CelloSaaS Felix ▾

Home Project Dashboard

Project Dashboard

Felix Member Since 1 days felix@gmail.com United States

Project Name	Assigned Task	New Task	Completed	Rejected
365CRM	5	5	0	0

ProjectTask Status Graph

ProjectTask Status

Assigned Task Completed Task

v 4.3.2.0

- Project Owner is assigned with the privileges to just view the projects which are assigned to him



7.4 Login as “Project Co-Ordinator”

Login as the Project Co-Ordinator and navigate to the Task page and reject anyone of the task.

7.5 Login as user with role – Employee

Employee has been granted to access and view only the Task page and accept or reject the tasks, so his menu will look something like below.

CelloSaaS Ethan.Hack

Home Task

Welcome to sample app

User Information

Name: Ethan.Hack UserID: 5e246b1f-3179-e311-9438-22000ae11024
 Email ID: Ethan.Hack@gmail.com Teanant Code: b3fa80d2-3079-e311-9438-22000ae11024

Setting

Roles

1)GRSEmployee 2)GRSMember

Employee Home Page

Navigate to Task page to see the tasks assigned to the Employee Role

CelloSaaS Ethan.Hack

Home Task

Task List

Search

Project Name	Project Owner	Task Name	Employee Name	Start Date	End Date	View Task
365CRM	Felix	Debug or manage the links between your pages	Ethan.Hack	1/17/2014 12:00:00 AM	1/29/2014 12:00:00 AM	
365CRM	Felix	Create or organize the navigation structure of your Web site	Ethan.Hack	1/23/2014 12:00:00 AM	1/31/2014 12:00:00 AM	
365CRM	Felix	Open, rename, save, and delete site diagrams	Ethan.Hack	1/22/2014 12:00:00 AM	1/31/2014 12:00:00 AM	
365CRM	Felix	View links or launch browsers and editors for items in a link diagram	Ethan.Hack	1/15/2014 12:00:00 AM	1/30/2014 12:00:00 AM	
365CRM	Felix	Create or prototype a new Web site	Ethan.Hack	1/12/2014 12:00:00 AM	1/14/2014 12:00:00 AM	

Employee Task List

7.6 Auto Event Raise

CelloSaaS offers Eventing System which helps Developers and Business Users to Register and Raise events using the Admin Dashboard. For the purpose of this LiveTour, there are multiple events related to this Project Management App is registered in the Event System, such as

- Project_Created (Raised when a project gets created in the system)
- Project_Updated (Raised when a project gets updated in the system)
- Project_Deleted (Raised when a project gets deleted in the system)
- ProjectTask_Created (Raised when a task gets created in the system)
- ProjectTask_Updated (Raised when a task gets updated in the system)
- ProjectTask_Deleted (Raised when a task gets deleted in the system)
- Task_Assigned (Raised when a task gets assigned to an employee in the system)
- Task_Status (Raised when a task status gets changed in the system)

To witness these event log, login as the Tenant Administrator and navigate to Monitor >> Event Audit

Event Audits Tenant: Company

Filter

Event Name: All
User Id: All
Subject Id:
Subject Type:
Target Id:
Target Type:
Context Id:
Context Type:
From Log Time: m/d/yy
To Log Time: m/d/yy
Event Status: New

Event Audits

- Login
admin@company.com : 1/24/2014 7:03 PM
admin@company.com login to the system
- Login
admin@company.com : 1/24/2014 2:06 PM
admin@company.com login to the system
- Login
Kalai : 1/23/2014 8:21 PM
Kalai login to the system
- Logout
admin@company.com : 1/23/2014 8:21 PM
admin@company.com logout of the system
- Login
Kalai : 1/23/2014 4:36 PM
Kalai login to the system
- Logout
admin@company.com : 1/23/2014 4:36 PM
admin@company.com logout of the system
- + Add User
admin@company.com : 1/23/2014 4:35 PM
Kalai was created.
- Login
admin@company.com : 1/23/2014 4:33 PM
admin@company.com login to the system

Event Audit

Manage Events

7.7 Event Execution on new Project creation

When a new project is added using the Project Page, the registered event will be raised by the Eventing System of Cello automatically, to notice the same using the Event Logger Page

Navigate to Admin >> Monitor >> Events

CelloSaaS admin@company.com | Change Tenant

Home My Account Subscription Tenant Access Control Configuration Management Manage Events Notifications Workflow Reports

Monitor

Event Audits Tenant: Company

Filter

Event Name: ProjectTask_Created
User Id: All
Subject Id:
Subject Type:
Target Id:

Event Audits

- ProjectTask_Created
admin@company.com : 1/3/2014 6:02 PM
The Task User Sharing was created.
- ProjectTask_Created
admin@company.com : 1/3/2014 6:01 PM
The Task Add Document was created.

Show 10 entries Showing 1 to 2 of 2 entries

7.8 Usage Log

Cello meters the actual consumption of functionalities by each tenant against the threshold by the product Administrator. On creating the projects, the consumption will be incremented or decremented according to the billing type (Prepaid/Post-paid), once the tenant exhaust or reach the set threshold, the particular functionality will be blocked for the user. To view the usage log, Login as **“Tenant Administrator”** and navigate to Monitor >> Usage

CelloSaaS Trial ends in 79 days Jhon.Michael ▾


Home My Account Subscription Tenant Access Control Configuration Management Manage Events Notifications Reports Monitor

Usage Audits

Usage Name	Module	Current Amount	Remaining Amount	View details
Project Usage	ProjectModule	17	33	Q
User	User	7	13	Q

7.9 Add Tasks

Tasks are individual job allocated to each member in the team, in this Live Tour, once the projects are added and assigned to the Project Owner Role, the tasks must be created and assigned to the users who are under employee role.

To Create a Task, Login as Project Manager, navigate to Project >> Click  on Create Task against a Project.

CelloSaaS Elvin.Mejo ▾

Home Project Task

Manage Project

Search

Add Project

Project Owner: --Select--
 Name:
 Project Type: -- Select --
 Description:
 StartDate: m/d/yy
 End Date: m/d/yy
 Status:

Project Owner	Name	Description	Start Date	End Date	Edit	Delete	Create Task	Assign Task
Sam	Staffion	Staffion	1/23/2014 12:00:00 AM	1/31/2014 12:00:00 AM			<input type="button" value="+"/>	

Show 10 entries Showing 1 to 1 of 1 entries

Once the task is assigned to an employee, it will start appearing on the particular employee Task List Page, To Witness, login as an “**Employee**” and navigate to Task Page.

CelloSaaS Evin.Mejo ▾

Home Project Dashboard Project Task

Task List

Search

Project Name	Project Owner	Task Name	Employee Name	Start Date	End Date	View Task	Task Status
365CRM	Felix	Debug or manage the links between your pages	Ethan.Hack	1/17/2014 12:00:00 AM	1/29/2014 12:00:00 AM		New
365CRM	Felix	Create or organize the navigation structure of your Web site	Ethan.Hack	1/23/2014 12:00:00 AM	1/31/2014 12:00:00 AM		New
365CRM	Felix	Open, rename, save, and delete site diagrams	Ethan.Hack	1/22/2014 12:00:00 AM	1/31/2014 12:00:00 AM		New
365CRM	Felix	View links or launch browsers and editors for items in a link diagram	Ethan.Hack	1/15/2014 12:00:00 AM	1/30/2014 12:00:00 AM		New
365CRM	Felix	Create or prototype a new Web site	Ethan.Hack	1/12/2014 12:00:00 AM	1/14/2014 12:00:00 AM		New

Task List Page

7.10 Subscription Level Security

Cello handles security in all the layers of the application i.e.

- ✓ Presentation Layer
- ✓ Business Layer
- ✓ Database Layer
- ✓ Service Layer
- ✓ Subscription Layer etc.

We can better understand the subscription layer security by looking at the menus you receive when you login as two different Tenants, i.e. as **AcmeCorp** who holds the “**Ultimate Edition**” which contains all the features of the application on the other hand **DallasInc** who have subscribed to “**Standard Edition**” which doesn’t contain Project Dashboard Feature enabled, so when **AcmeCorp** Tenant login, they will be able to see all the menus, whereas when **DallasInc** login, they will not see “Project Dashboard” menu.

7.11 Menu of AcmeCorp

ACME Corp John.Michael ▾

Home Project Dashboard Project Task

Project Dashboard

John Michael Total Project: 1 Total Project Task: 2

Member Since 1 days
 john.michael@gmail.com
 Australia

ProjectTask Details

Project Name	Assigned Task	New Task	Completed	Rejected
Staffion	2	0	1	1

ProjectTask Status Graph

ProjectTask Status

Assigned Task (orange bar) Completed Task (green bar)

7.12 Menu of DallasInc

Dallas Inc

Home Project Task

Manage Project

Search GO

Project Owner	Name	Description	Start Date	End Date	Edit	Delete	Create Task
Sam	Staffion	Staffion	1/23/2014 12:00:00 AM	1/31/2014 12:00:00 AM			

Show entries Showing 1 to 1 of 1 entries

Add Project

Project Owner:

Name:

Project Type:

Description:

StartDate:

End Date:

Status:

Reset Add

7.13 Page or (Controller/Action) Level Security

Cello authenticates every user against each controller/action methods in the application. As an additional security measure, cello allows you to verify whether the user has been granted to access certain controllers/methods or pages in the application.

To observe, Login as an “employee” role and try to access the task page.



Task List

Project Name	Project Owner	Task Name	Employee Name	Start Date	End Date	View Task	Task Status
365CRM	Felix	Debug or manage the links between your pages	Ethan.Hack	1/17/2014 12:00:00 AM	1/29/2014 12:00:00 AM		
365CRM	Felix	Create or organize the navigation structure of your Web site	Ethan.Hack	1/23/2014 12:00:00 AM	1/31/2014 12:00:00 AM		
365CRM	Felix	Open, rename, save, and delete site diagrams	Ethan.Hack	1/22/2014 12:00:00 AM	1/31/2014 12:00:00 AM		
365CRM	Felix	View links or launch browsers and editors for items in a link diagram	Ethan.Hack	1/15/2014 12:00:00 AM	1/30/2014 12:00:00 AM		
365CRM	Felix	Create or prototype a new Web site	Ethan.Hack	1/12/2014 12:00:00 AM	1/14/2014 12:00:00 AM		Completed
TigerERP	Felix	Stage 1 Discovery and Prototypes	Ethan.Hack	1/18/2014 12:00:00 AM	1/31/2014 12:00:00 AM		Rejected

Show 10 entries Showing 1 to 6 of 6 entries

v 4.3.2.0

7.14 What is Pickup List and how it is used

Pickup list is a feature of Cello which simplifies the management of master data. Using this feature, the Product Administrator and Tenant Administrator can create master data using the screens provided by Cello.

Benefits of Pickup List

1. Reduce the overhead of Developers
2. Create/Manage Pick up List in Run Time
3. Highly Configurable
4. Map Pick up list to Custom Fields

Pickup list Feature is provided out of the box and there is no code level configuration or changes required.

Navigate to Configurations → Manage Pickup Lists


Manage Pickup List

Tenant: Company [Add](#)

Name	Edit	Activate/Deactivate	Manage Values
Company Size			
Country			
Department			
Division			
Resolutions			
Self Registration Packages			

Show 10 entries Showing 1 to 6 of 6 entries

Manage Pickup List Screen

- Click  on Add link to add a new Pick List as shown in the below Screenshot

Manage Pickup List

Tenant: Company [Add](#)

Name	Edit	Activate/Deactivate	Manage Values
Age			
Company Size			
Country			
Department			
Division			
Resolutions			
Self Registration Packages			
Sex			

Show 10 entries Showing 1 to 8 of 8 entries

Add Pickup List Details

Name*

[Cancel](#) [Add](#)

The name of the Pick List will be displayed in the label of the pickup list. You can change the values without affecting the label value. After entering the Key-Pairs for the pickup list, specify whether the values are displayed in alphabetical order.



You can edit pickup lists when the field is in production. Be aware of the potential implications of this action. Make sure to provide a unique pickup list name. Avoid specifying a global pickup list name.

7.15 Manage Pick List Values

CelloSaaS admin@company.com | Change Tenant

My Account Subscription Tenant Access Control Configuration Business Events Notifications Workflow Reporting Monitor

Manage Pickup List Tenant: Company Add

Search

Name	Edit	Activate/Deactivate	Manage Values
Age			
Company Size			
Country			
Department			
Division			
Resolutions			
Self Registration Packages			
Sex			

Show 10 entries Showing 1 to 8 of 8 entries

CelloSaaS admin@company.com | Change Tenant

My Account Subscription Tenant Access Control Configuration Business Events Notifications Workflow Reporting Monitor

Country Pickup List Values Back Add

Search

Value	Name	Description	Edit	Activate/Deactivate
Greece	Greece	Greece		
Spain	Spain	Spain		

Show 10 entries Showing 1 to 2 of 2 entries

Edit Pickup List Value


Value* Name*

Description

7.16 How Pickup list is used in LiveTour App

With reference to the Pickup list explained above, to showcase the usability of Pickup List, this live tour uses pickup list in the Create Project Form(Refer the below Screenshot), to see it in action, Login as Project Manager and navigate to Project Page.

The screenshot shows the 'Manage Project' interface. On the left, the 'Add Project' form has a 'Project Type' dropdown menu highlighted with a red box. The dropdown is open, showing a list of project types: '.NET', 'Java', 'C', 'ASP .NET', and 'Open Source'. The main table on the right displays a single project entry with columns for Project Owner, Name, Project Type, Description, Start Date, End Date, Edit, Delete, View Project, Create Task, and Assign Task.

To change the values of this pickup list, login as the Tenant Administrator, and navigate to Configuration Management >> Manage Pickup List >> Click  on Manage Values and manage the values that gets displayed in the Pickup list.

The screenshot shows the 'Project Type Pickup List Values' page. The table below lists the current values in the pickup list:

Value	Name	Description	Edit	Activate/Deactivate
.NET	.NET	Dot Net	<input type="checkbox"/>	<input type="radio"/>
ASP.NET	ASP .NET	ASP .NET	<input type="checkbox"/>	<input type="radio"/>
C	C	C Language	<input type="checkbox"/>	<input type="radio"/>
Java	Java	Java	<input type="checkbox"/>	<input type="radio"/>
OpenSource	Open Source	Open Source	<input type="checkbox"/>	<input type="radio"/>



1. Try adding some more values to the existing Pick up list collection of Project type. In order to try, login as project manager and navigate to create project page to look at the new value added



The pickup list changes that are done by respective tenant is only preserved at each tenant level and it doesn't affect any other tenants data.

7.17 How Notifications are sent

CelloSaaS's Notification has three components in it namely

1. Notification Engine
2. Notification Service
3. Notification Content Templates

In order to send notification, the first step is to Configure Notification details, refer [here](#). Once the notification is configured, you can call the below service to send notification from the system.

For this live Tour, there are two emails triggered in two different places, they are

1. While assigning a task to an employee
2. While an employee accept or rejects a particular task an email will be sent back to the respective project manager. To confirm whether an email is sent for any above of the above activity navigate to Notification Log page under monitor menu(Refer below Screenshot)

The screenshot displays the CelloSaaS user interface. At the top, the user is logged in as 'admin@company.com' with a 'Change Tenant' option. The navigation bar includes icons for My Account, Subscription, Tenant, Access Control, Configuration, Business Events, Notifications, Workflow, Reporting, AddOn, and Monitor. The main content area is titled 'Notification Audit Details' and shows a search filter for 'Email' notifications. The search results list two notifications: a 'Bill Generated Notification' sent on 1/14/2014 at 2:48 PM and a 'Tenant Welcome Mail' sent on 1/14/2014 at 2:39 PM. The bill notification details include recipient 'tamekia.eastham@techcello1.com', sender 'cellosaasdemo@gmail.com', and subject 'Bill #1782 - \$566.87 USD'. The welcome mail details include recipient 'admin@cosco1.com', sender 'cellosaasdemo@gmail.com', and subject 'Welcome To Techcello'.

7.18 Login as Tenant Admin

Tenant Administrator is a special role assigned to a user to manage the entire tenant administrative tasks.

When you login as Tenant Administrator, you can see the below

CelloSaaS michael.jack

Home Admin

Welcome to sample app

User Information

Name: michael.jack UserID: bcfa80d2-3079-e311-9438-22000ae11024
 Email ID: Tenant Code: b3fa80d2-3079-e311-9438-22000ae11024


Setting

Roles

1)GR\$Tenant_Admin

v4.3.2.0

Welcome Screen

Click  on Admin to navigate to the admin section

CelloSaaS Trial ends in 13 days michael.jack

Home My Account Subscription Tenant Access Control Configuration Management Manage Events Notifications Reports Monitor

Account Dashboard

Dallas Inc Standard Pack15 \$0

Member since 1 days

Start 9 Jan, 14 Trial End 24 Jan, 14

Total Users: 4 Online Users: 1 Child Tenants: 0

Total Bills (YTD): 0 Bill Amount (YTD): \$0 Due Amount: \$0

Usage Name	Max Limit	Used	Remaining
BillingInvoiceAmount	UNLIMITED	0	UNLIMITED
BillingInvoiceYTD	UNLIMITED	0	UNLIMITED
Project Usage	15	1	14
User	20	4	16

Un-Paid Bills

Online Users

michael.jack

Activity Stream

- Login: michael.jack : 1/11/2014 7:17 AM
michael.jack logon to the system
- Logout: Ethan.Hack : 1/11/2014 7:17 AM
Ethan.Hack logout of the system
- Login: Ethan.Hack : 1/11/2014 7:16 AM

7.19 Adding Custom Fields

Custom fields feature gives the ability to the individual tenants to extend the physical and virtual entities by adding custom fields on the fly.

To configure custom fields for an entity, navigate to Admin>> Configuration>> Manage Entities

CelloSaaS admin@company.com | Change Tenant

My Account Subscription Tenant Access Control Configuration Business Events Notifications Workflow Reporting Monitor


Entity Management Tenant: Company Add

Search GO

Entity Name	Manage Extn Fields	View Base Fields	Validation Rule	Pre-Processor Rule	Delete Virtual Entity
Address					-
ContactDetails					-
Tenant					-
User					-

Show 10 entries Showing 1 to 4 of 4 entries

Entity Management

- Click  on Manage Entities against the Entity to which the custom field has to be added.
- The following figure shows that a selected entity does not have any extension or custom fields

CelloSaaS admin@company.com | Change Tenant

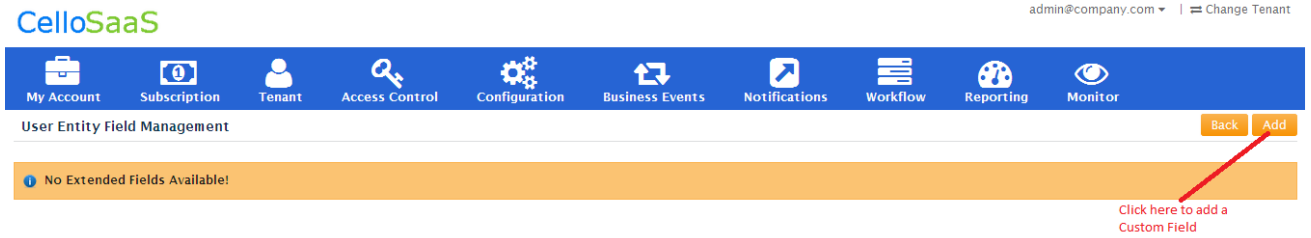
My Account Subscription Tenant Access Control Configuration Business Events Notifications Workflow Reporting Monitor

User Entity Field Management Back Add

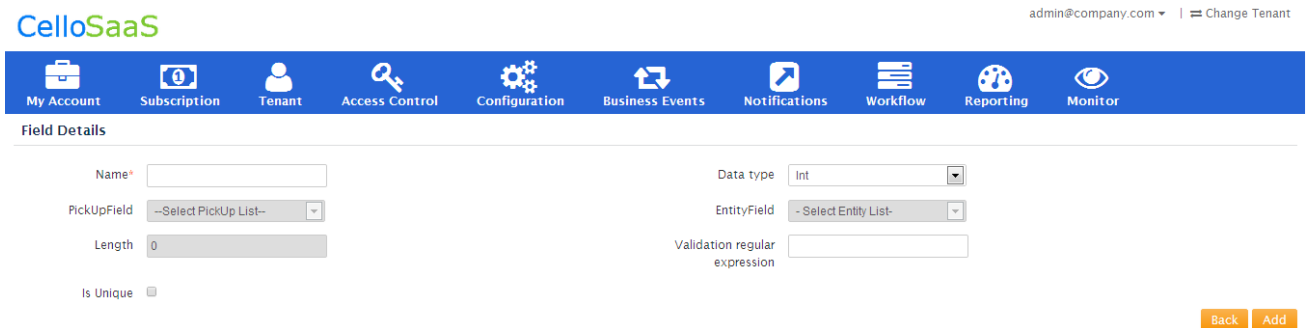
No Extended Fields Available!

User Entity Fields Management

- The following figure shows how to add the extension field to an entity listed.



Custom Fields List



Add Custom Fields

- The above figure shows the properties or the metadata that will be captured from the user for each of the extension field.

- The name of the extension field will be unique for an entity.
- The extension fields support the following datatypes
 - Integer
 - Date
 - Pickupfield [Pickup lists that are global and specific to that tenant are listed here]
 - Varchar
 - Float
 - Boolean
- The **length** property can be used to restrict the length of the input for the case of varchar fields
- The Validation **regular expression** is used to validate the user input when the extension field value is to be saved in the database.
- The **IsUnique** property is to indicate that this extension field will take only unique values.

- The following figure shows the newly added Extended Fields for an Entity

admin@company.com | Change Tenant

My Account Subscription Tenant Access Control Configuration Business Events Notifications Workflow Reporting Monitor

Address Entity Field Management Back Add

Field Name	Length	Is Unique	Field Type	Edit Field	Delete Field
Age	0	False	PickupList		
Street Name	0	False	Text		

Show 10 entries Showing 1 to 2 of 2 entries

User Entity Fields Management

2. After an extended field is added to an entity, it has to be included in any of the data views so that it becomes visible to the User via any View element I.E. a Grid or the Form control. This mapping procedure is illustrated below,
 - Data views are logical containers for representing the views that may be associated with an entity feature. Data views are used to group the collection of fields that are rendered to the UI during the runtime.

- Once a Field is included in an Entity, it has to be included in any of the form. To include a custom field into the data views, follow the below procedures.

Navigate to the Data view Management Admin → Configuration → Manage Data view

Name	Description	Main Entity	Manage Field	Edit	Delete
Contact Details	Contact Details	ContactDetails		-	-
Tenant Address Details	Tenant Address Details	Address		-	-
Tenant Details	Tenant Details	Tenant		-	-
Tenant Details Grid	Tenant Details Grid	Tenant		-	-
Tenant Relations Grid	Tenant Relations Grid	TenantRelations		-	-
Tenant User Details	Tenant User Details	User		-	-
User Address Details	User Address Details	Address		-	-
User Details	User Details	User		-	-
User Details Grid	UserDetailsGrid	User		-	-



Dataview Management

- Dataview Management Lists out all the configured/Registered data views in the application
- Look for the respective entity and the dataview, to which the extended field needs to be included.
- Click on the Manage Fields against the respective Dataview and the entity to incorporate the new field into the Dataview.
- On clicking on the manage field icon against the Entity, all the basic fields along with the Custom fields added will be displayed, Refer the below screenshot.


7.20 How to administer Billing

Billing dashboard provides billing related information in one place, please refer the billing information by navigating through Admin >> My Account >> My Bills

My Bills

Account Summary						
Tenant Name	AcmeCorp  admin@acmecorp.com  +1-234-567-8901				Total Bills	0
Package <small>Q View History</small>	Reseller Plan				Total Amount	\$0.00
Price Plan	Reseller - Price Plan				Total Paid	\$0.00
Subscription Period	12/13/2013 5:22 AM				Overdue Amount	\$0.00

Current Bill Statement View Download						
Previous Balance	Invoice No#	Bill Period	Invoice Date	Bill Amount	Total Amount Payable	Due Date
\$0.00	1788	12/15/2013 - 1/15/2014	1/7/2014	\$1,134.87	\$1,134.87	1/20/2014

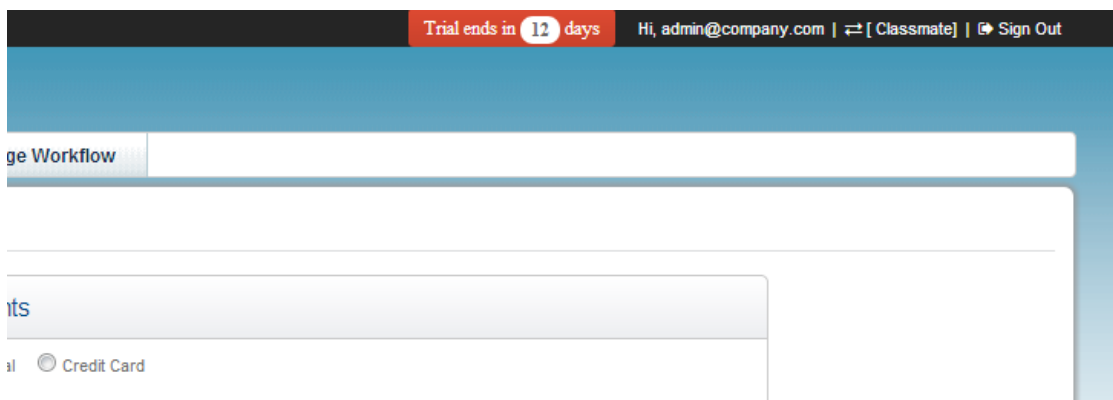
Current Bill Charge Details			Previous Bills
Item Name	Description	Amount	<div style="background-color: #f96; padding: 5px; border: 1px solid #ccc;">  Previous bill are not available! </div>
Reseller Plan - Reseller - Price Plan	Period: 12/15/2013 12:00 AM to 1/15/2014 12:00 AM	\$999.00	
VAT 4%	VAT 4%	\$39.96	
CST 3%	CST 3%	\$31.17	
PST 5%	PST 5%	\$53.51	
EST 1%	EST 1%	\$11.24	


7.21 How to Upgrade/Downgrade

Tenant administrators can upgrade/downgrade to other subscription plans at any point of time. Below are the procedures shown to upgrade and downgrade the subscription.

7.22 Self-Upgrade/Downgrade Subscription plan

Customers who are currently using Evaluation Packages will receive a Call-To-Action message in the top bar with the number of Evaluation Days left. Towards the end of the Trial period, the customer will receive an email notification as the evaluation period is over and links to upgrade with enterprise plan.



During or after the evaluation period, Customers can click  on the Call-To-Action alert message and self-upgrade by themselves without any assistance from the product administrator.

Customers can also upgrade/downgrade their current plan by navigating to My Account → Upgrade/Downgrade Subscription.

The screenshot displays the CelloSaaS user interface. At the top, there is a navigation bar with icons for My Account, Subscription, Tenant, Access Control, Configuration, Business Events, Notifications, Reporting, and Monitor. A trial status indicator shows 'Trial ends in 14 days' and the user is logged in as 'admin@cosco1.com'. The main content area is titled 'Subscription plan' and features two options: 'Basic Package' (Basic package with 15 days trial, \$125.00 + USAGE CHARGES*, Monthly) and 'Use and Pay Package' (Usage based billing package, USAGE CHARGES*, Monthly). Below this is the 'Company Details' section with fields for Tenant Name (Cosco), Website, First Name (Admin), Email (admin@cosco1.com), Description, Company Size (1-100), Last Name (Cosco), and Phone Number (+1-234-567-8901). There are also fields for Billing Address (Address 1, Address 2, City, State, Country, Zip Code) and Settings (Theme: CelloSkin, Logo: Choose File). A 'Save' button is located at the bottom right of the form.



- Login as “AcmeCorp” who holds Ultimate Package and downgrade to “Standard Package” and see what happens
- Login as “DallasIn” who holds Standard Package and Upgrade to “Ultimate Package” and see what happens

7.23 Upgrade/Downgrade Subscription plan of Tenant by Prod Admin

Product administrator can change the subscription plans of the Tenant using Tenant Management Module.

- To change the Subscription Login as Product Administrator → Tenant → Manage Tenants [Refer below Screenshot]

My Account Subscription Tenant Access Control Configuration Business Events Notifications Workflow Reporting Monitor

Tenant Management Tenant: Company +Add

Approved Tenants | Unapproved Tenants | Tenant Density Graph

	Active Tenants	Not Activated	New 2013	
	31	3	7	
	Paying	Trial	Cancelled 2013	
	29	2	1	

Search text... Is Online Has Child Tenants Has Overdue Without Payment Account Self Registered Auto Debit

All All All Search Reset

ABC Telecom	Use and Pay Package	Use & Pay Plan	Total Users	Online Users	Child Tenants
Member since 1 years		\$0	1	0	0
http://abctelecom.techcello.com	Start	End	Total Bills (YTD)	Revenue (YTD)	Overdue
gustavo.pollman@techcello1.com	5 May, 12	..	10	\$0	\$0

Tenant Management

Click on the Tenant Name, this opens the Tenant details in the edit mode [Refer below Screen]

CelloSaaS
admin@company.com | [Change Tenant](#)

My Account
Subscription
Tenant
Access Control
Configuration
Business Events
Notifications
Workflow
Reporting
Monitor

Query Builder Update Deactivate License

Chart Builder

Edit Tenant

Tenant Details

Tenant Name *

Website

Tenant Types *

Description

URL

Auto Debit

Billing Address

ⓘ If any field for Billing Address is filled in, the mandatory check will be enforced.

Address *

State *

Postal Code

City *

Country *

Contact Details

ⓘ If any field for Contact Details is filled in, the mandatory check will be enforced.

First Name *

Phone *

Contact Email *

Last Name *

Fax

Package Settings [Q](#) [View History](#)

Package *

Subscription Start Date *

Trial End Date

Price Plan

Subscription End Date

Number of Users

Tax Rate

Description

Default taxes

Name	Description	Percentage	Order	
<input type="text" value="VAT 4%"/>	<input type="text" value="VAT 4%"/>	4%	<input type="text" value="0"/>	<input type="button" value="🗑"/>

Cancel Update

Copyright © 2013 by techcello.com All Rights Reserved.

Edit Tenant Details

- Select the desired package and a plan
- Click on Save

7.24 View Login Audits

Authentication methods are completely wrapped in Event system, i.e. all the user logins and logout functions are audited. To view the Authentication logs, login as Tenant Administrator and navigate to Monitor >> Event Audits >> Filter by Login Event name.


The screenshot displays the CelloSaaS user interface. At the top, the CelloSaaS logo is on the left, and the user email 'admin@company.com' with a 'Change Tenant' link is on the right. A navigation bar contains icons for My Account, Subscription, Tenant, Access Control, Configuration, Business Events, Notifications, Workflow, Reporting, AddOn, and Monitor. Below this, the 'Event Audits' section is active, with a 'Tenant' dropdown set to 'Company'. On the left, a 'Filter' panel includes dropdowns for Event Name (set to 'Login'), User Id (set to 'All'), and Event Status (set to 'New'), along with input fields for Subject Id, Subject Type, Target Id, Target Type, Context Id, Context Type, From Log Time, and To Log Time. 'Reset' and 'Search' buttons are at the bottom of the filter panel. The main 'Event Audits' table lists ten login events for 'admin@company.com' with timestamps ranging from 1/7/2014 4:49 AM to 1/11/2014 1:37 PM. Each entry includes a magnifying glass icon and the text 'admin@company.com logon to the system'. At the bottom of the table, it says 'Show 10 entries Showing 1 to 10 of 493 entries' with pagination controls.

User Address Details

Display Name	Field Type	Ordinal	Is Visible	Is Extended Field	Is Editable	Edit Field	Exclude
Address	TextBox	1	True	False	-	-	-
Age	DropDownList	6	True	True	True	-	Exclude
City	TextBox	2	True	False	-	-	-
Country	DropDownList	4	True	False	-	-	-
Postal Code	TextBox	5	True	False	-	-	-
State	TextBox	3	True	False	-	-	-
Street Name	TextBox	0	False	True	False	Include	-

Show 10 entries Showing 1 to 7 of 7 entries

Custom Fields Management

- Clicking  on include will display the below screenshot.

DataView Field Properties

Display Name: Age

Max Length: 0

Regular Expression:

Field Type: DropDownList

--Select--

Description:

Is Extended Field: True

Is Editable:

Is Mandatory:

Is Visible:

Pickup List Name: Self Registration Packages

Is MultiSelect:

Custom Fields Properties

- The above figure illustrates the properties that can be set for the extended fields with respect to the dataview in which it will be included. These properties take **more precedence** than that of the entity field properties managed for each of the extended field.

- **Max length** property restricts the maximum length of the value that the user can provide for this extension field.
 - **Regular Expression** property is used to input the regular expression to validate the data for the entity.
 - **Is Editable** makes this fields as an editable field in this dataview
 - The **IsMandatory** property marks that this field should be provided a value prior to save
 - The **IsVisible** property set the visibility of the field in this dataview.
- Once these property values are updated, the field is added on to the Respective Form.



There is no change required in the code level for the Grid or the form control with respect to the extension fields. All the metadata mapping and rendering is taken care by Cello during the runtime based on the tenant identifier provided if the CelloGrid and CelloForms are used.

- The following figure shows the extended field rendered as part of the form along with that of the entity's base fields.

The screenshot shows the CelloSaaS interface for adding user details. The form is titled 'Add User Details' and includes a 'Tenant Name' field set to 'Company'. Below this, there are sections for 'User Details' and 'Address Details'. The 'User Details' section includes fields for First Name, Last Name, User Name, and Email. The 'Address Details' section includes fields for Address, City, State, Country, and Postal Code. A custom 'Age' field is highlighted with a red box, showing a dropdown menu with options like '-- Select --' and '17'. The form also has 'Cancel' and 'Save' buttons.

Custom Field in a Dataview

- Similarly, the extension field can also be included in the grid view.
- The same steps followed for incorporating the fields into the Form has to be repeated for Grid-Dataview.

7.25 Add a custom field in project




Login as the Tenant Administrator and follow the above procedure and try to add a custom field for the Add Project Form.

- Add a field of type **varchar** to capture “Project Code”
- Include this field in the “Project” formview and grid view
- Once the field is added, login as project manager and navigate to the project page to see the field

8 Step 4: Operations

8.1 *Login as product admin*

1. Create a new Tenant by filling up the Tenant Details form
2. Subscribe to any one of the existing Subscriptions and click  on Save and create a new Tenant

8.2 *Tenant Dashboard*

Tenant dashboard provides an integrated view of all the tenants’ information in one place. Login as Product Administrator and navigate to Tenant>> Manage Tenant Details

Tenant	Package	Use & Pay Plan	Total Users	Online Users	Child Tenants	Total Bills (YTD)	Revenue (YTD)	Overdue
ABC Telecom	Use and Pay Package	\$0	1	0	0	9	\$0	\$0
Acme Corp	Basic Package	\$149	1	0	0	9	\$1,341	\$12,247
Acme, inc.	Basic Package	\$149	2	0	0	9	\$1,341	\$10,459

8.3 Tenant Analytics Dashboard

The customer analytics data is very critical for the decision makers to decide the actions and to take necessary steps to the market product as well as understand the customer needs by ourselves.

CelloSaaS Provides Tenant Analytics feature as part of the Tenant Management module which provides detailed analysis about the status of the Tenants in the application.

With this feature, a member of a Marketing team can understand the list of customers who activated the account, but then the tenants haven't effectively used the product. This could be because of many reasons i.e. they are unable to use the product for some reason, they got stuck somewhere, or they might have other priorities to do etc, so in this situation, with the help of Tenant Analytics, the marketing team can be pro-

active in getting touch with respective account holders and follow up with them and understand the problem they are facing with the product and help them to effectively evaluate the product.

In other case, Marketing can go behind the hot trials and take the opportunity to closure.

Registered Tenants are categorized into 3 types, they are

Tenant Type	Description
<i>Hot Trials</i>	<i>Refers to the Trial Customers who are actively using the Product</i>
<i>Trials Needing Attentions</i>	<i>Refers to the Trial Customers who are not using the product, and hence they need some attention in terms helping them to effectively use the product</i>
<i>Customer Needing Attention</i>	<i>Refers to active and paid customers who are not using the product effectively</i>

These information can help the management, marketing and business development team of the SaaS providers to understand the customer usage pattern, their interests etc.



The Tenant analytics feature is available by default for the Product owner.

Navigate to Admin>> Tenant>> Tenant Analytics

My Account
 Subscription
 Tenant
 Access Control
 Configuration
 Business Events
 Notifications
 Workflow
 Reporting
 Monitor

Hot Trials

Trial From Date >= Trial To Date <= Since last activity day Visit Frequency

Name	Trial From Date	Trial To Date	Last Activity Date	Total Hits	Average Hits/Day	User Count	Trial Days	Used Days	Visit Frequency
Dell Systems	11/5/2013	12/5/2013	11/13/2013	15	15	2	10	1	Low

Show entries Showing 1 to 1 of 1 entries

Trials Needing Attention

Trial From Date >= Trial To Date <= Has no activity since last day Visit Frequency

Name	Trial From Date	Trial To Date	Last Activity Date	Total Hits	Average Hits/Day	User Count	Trial Days	Used Days	Visit Frequency
Dell Systems	11/5/2013	12/5/2013	11/13/2013	15	15	2	10	1	Low

Show entries Showing 1 to 1 of 1 entries

Customer Needing Attention

Since last activity day Visit Frequency

Name	From Date	Last Activity Date	Total Hits	Average Hits/Day	User Count	Total Days	Used Days	Visit Frequency
Acme Corp	5/17/2006	11/7/2013	204	12.75	1	2739	16	Low
Dell Systems	11/5/2013	11/13/2013	15	15	2	10	1	Low
Demo Company	2/10/2012	9/27/2013	28	14	1	644	2	Low
globaltenant	10/16/2013	10/16/2013	3	3	1	30	1	Low
LexCorp	7/16/2007	9/26/2013	5	5	1	2314	1	Low
Sony	10/17/2013	10/17/2013	15	15	1	29	1	Low

Show entries Showing 1 to 6 of 6 entries

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Tenant Analytics

8.3.1 Hot Trials

Hot Trials refers to the trial customers who are actively using the Product, you can use the filter the hot trial customers with various filters provided in the screen.

Filters

Field Title	Description
Trial From Date	The Day in which the Trial Account was started.
Trial To Date	The Day in which the Trial Account will end(ed).
Since Last Activity Day	Refers the last day since the application was used.

Visit Frequency	<p>High : If a tenant visited the site more than 70 times, then it is considered as High visit frequency</p> <p>Medium : If a tenant visited the site between 40 - 70 times, then it is considered as medium visit frequency</p> <p>Low : Refers to If a tenant visited the site between 0 - 40 times, then it is considered as low visit frequency</p> <p>Example</p> <p>If Tenant A subscribed on Nov1 for a 15 Days Free Trial Package, within the 15 Days period if the tenant has logged in for about 500 times, the usage frequency will be calculated as follows</p> <p>1500 Logins/ 15 Logins = 100 (Average Logins) – High Frequency</p>
-----------------	---

8.3.2 Trials Needing Attention

Trials needing attentions refers to the trial customers who are less or not actively using the product and hence they might require some special attention. Use the filters with various parameters provided in the screen.

Filters

Field Title	Description
From Date	The Day in which the Trial Account was started
To Date	The Day in which the Trial Account will end(ed).
Has no activity since last day	Refers the last day since the application was used.
Visit Frequency	<p>High : If a tenant visited the site more than 70 times, then it is considered as High visit frequency</p> <p>Medium : If a tenant visited the site between 40 - 70 times, then it is considered as medium visit frequency</p> <p>Low : Refers to If a tenant visited the site between 0 - 40 times, then it is considered as low visit frequency</p> <p>Example</p>

	<p>If Tenant A subscribed on Nov1 for a 15 Days Free Trial Package, within the 15 Days period if has logged in for about 30 times, the usage frequency will be calculated as follows</p> <p>$30 \text{ Logins} / 15 \text{ Logins} = 2 \text{ (Average Logins)} - \text{Low Frequency}$</p>
--	--

8.3.3 Customer Needing Attention

Customer needing attentions refers to the trial customers who are less or not actively using the product and hence they might require some special attention. Use the filter with various parameters provided in the screen.

Filters

Field Title	Description
Has no activity since last day	Refers the last day since the application was used.
Visit Frequency	<p>High : If a tenant visited the site more than 70 times, then it is considered as High visit frequency</p> <p>Medium : If a tenant visited the site between 40 - 70 times, then it is considered as medium visit frequency</p> <p>Low : Refers to If a tenant visited the site between 0 - 40 times, then it is considered as low visit frequency</p> <p>Example</p> <p>If a paid Tenant A who is in monthly billing cycle logs in for about 200 times, the usage frequency will be calculated as follows</p> <p>$300 \text{ Logins} / 30 \text{ Days} = 30 \text{ (Average Logins)} - \text{Medium Frequency}$</p>

My Account Subscription Tenant Access Control Configuration Business Events Notifications Workflow Reporting Monitor

Hot Trials

Trial From Date >= 8/28/2013 Trial To Date <= Since last activity day Visit Frequency Low [Reset](#) [Search](#)

Name	Trial From Date	Trial To Date	Last Activity Date	Total Hits	Average Hits/Day	User Count	Trial Days	Used Days	Visit Frequency
AgileBio	10/23/2013	11/7/2013	10/28/2013	3	3	1	6	1	Low

Show 10 entries Showing 1 to 1 of 1 entries

Trials Needing Attention

Trial From Date >= 8/1/2013 Trial To Date <= Has no activity since last day Visit Frequency Low [Reset](#) [Search](#)

No records are available for the search criteria!

Customer Needing Attention

Since last activity day Visit Frequency -All- [Reset](#) [Search](#)

Name	From Date	Last Activity Date	Total Hits	Average Hits/Day	User Count	Total Days	Used Days	Visit Frequency
Acme Corp	5/17/2006	10/28/2013	86	7.17	1	2722	12	Low
Acme, inc.	1/27/2007	10/25/2013	111	22.2	1	2467	5	Low
Allied Biscuit	2/18/2008	9/30/2013	2	2	1	2080	1	Low
Ankh-Sto Associates	4/27/2006	9/25/2013	4	4	1	2742	1	Low
Bootstrap	9/26/2013	9/26/2013	47	47	1	33	1	Low
Demo ccount2	10/7/2013	10/7/2013	136	136	1	22	1	Low
Demo Company	2/10/2012	9/27/2013	28	14	1	627	2	Low
Demo, inc.	6/22/2012	9/26/2013	5	5	1	494	1	Low
DemoAccount	10/1/2013	10/17/2013	392	78.4	3	28	5	Low
Extensive Enterprise	6/8/2006	9/26/2013	3	3	1	2700	1	Low

Show 10 entries Showing 1 to 10 of 15 entries

8.4 View Client Bills

Client Bills refers to collection of all tenant bills. This is available for Product Administrators and Tenants with sub Tenants under them especially in the Tenant Hierarchy Scenarios i.e. Resellers, Enterprise Tenants etc.

To View Client Bills, Navigate to Admin >> Subscription>> Client Bills

[My Account](#)
[Subscription](#)
[Tenant](#)
[Access Control](#)
[Configuration](#)
[Business Events](#)
[Notifications](#)
[Workflow](#)
[Reporting](#)
[Monitor](#)

Manage Child Bills

Tenant:

Account Summary

Tenant Name	Acme Corp ✉ belva.majewski@techcello1.com ☎ +1-903-766-2159	Total Bills	90
Package 🔍 View History	Basic Package	Total Amount	\$12,556.76
Price Plan	Basic Plan	Total Paid	\$0.00
Subscription Period	5/17/2006 12:00 AM	Overdue Amount	\$12,556.76

Current Bill Statement [✎ Edit](#) [👁 View](#) [📄 Download](#)

Previous Balance	Invoice No#	Bill Period	Invoice Date	Bill Amount	Total Amount Payable	Due Date
\$12,556.76	1754	11/1/2013 - 12/1/2013	11/6/2013	\$154.96	\$12,711.72	12/5/2013

Current Bill Charge Details

Item Name	Description	Amount
Basic Package - Basic Plan	Period: 11/1/2013 12:00 AM to 12/1/2013 12:00 AM	\$149.00
VAT 4%	VAT 4%	\$5.96

Previous Bills

Invoice No#	Bill Period	Amount	Paid	Edit	View
1727	10/1/2013 - 11/1/2013	\$154.96	\$0.00	✎	👁
1702	9/1/2013 - 10/1/2013	\$154.96	\$0.00	✎	👁
342	8/1/2013 - 9/1/2013	\$149.00	\$0.00	✎	👁
337	7/1/2013 - 8/1/2013	\$149.00	\$0.00	✎	👁
332	6/1/2013 - 7/1/2013	\$149.00	\$0.00	✎	👁
328	5/1/2013 - 6/1/2013	\$149.00	\$0.00	✎	👁
324	4/1/2013 - 5/1/2013	\$149.00	\$0.00	✎	👁
320	3/1/2013 - 4/1/2013	\$149.00	\$0.00	✎	👁
315	2/1/2013 - 3/1/2013	\$149.00	\$0.00	✎	👁
311	1/1/2013 - 2/1/2013	\$149.00	\$0.00	✎	👁

Show entries Showing 1 to 10 of 90 entries [⏪](#) [⏩](#) [1](#) [2](#) [3](#) [4](#) [5](#) [⏭](#)

Client Bills

8.5 Invoice Search

The Product Administrator can get a unified look of all the past invoices using Search Bills page.

Login as Product Administrator and Navigate to Billing >> Search Client Bills.



Search Bills

Filter

Tenant:

Status:

From Date:

To Date:

Search Result

Notification:

	Invoice No#	Tenant Name	Invoice Date	Bill Period Start	Bill Period End	Amount	Paid	Status	Email Audit	View
<input type="checkbox"/>	1727	Acme Corp	11/5/2013	10/1/2013	11/1/2013	\$154.96	\$0.00	UNPAID	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	1753	Praxis Corporation	11/5/2013	10/1/2013	11/1/2013	\$518.96	\$0.00	UNPAID	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	1752	Omni Consumer Products	11/5/2013	10/1/2013	11/1/2013	\$154.96	\$0.00	UNPAID	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	1751	LuthorCorp	11/5/2013	10/1/2013	11/1/2013	\$154.96	\$0.00	UNPAID	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	1750	Mr. Sparkle	11/5/2013	10/1/2013	11/1/2013	\$154.96	\$0.00	UNPAID	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	1749	Globo-Chem	11/5/2013	10/1/2013	11/1/2013	\$154.96	\$0.00	UNPAID	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	1748	Galaxy Corp	11/5/2013	10/1/2013	11/1/2013	\$154.96	\$0.00	UNPAID	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	1747	Extensive Enterprise	11/5/2013	10/1/2013	11/1/2013	\$518.96	\$0.00	UNPAID	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	1746	Ankh-Sto Associates	11/5/2013	10/1/2013	11/1/2013	\$154.96	\$0.00	UNPAID	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	1745	Allied Biscuit	11/5/2013	10/1/2013	11/1/2013	\$518.96	\$0.00	UNPAID	<input type="checkbox"/>	<input type="checkbox"/>

Show entries Showing 1 to 10 of 1730 entries

Search Client Bills

8.6 View Product Usage

Product Analytics gives the entire Usage details of the application i.e. Who accessed a page, when was it accessed, what was the response time etc, this feature can be turned **On** or **Off** at both Application and Tenant Level.

Navigate to Monitor >> Usage

8.7 Viewing Analytics Data via Dashboard

- My Account
- Subscription
- Tenant
- Access Control
- Configuration
- Business Events
- Notifications
- Workflow
- Reporting
- Monitor

Product Analytics Audit

Tenant: All From Date >= To Date <= Response Time (Sec) >= Page Size >= Unhandled Error

Reset Search

Total Hits	Average Response Time	Average Page Size
2222	0.84	21.95

Tenant Name	User Name	Action	Time Stamp	Browser Details	Exception	URL	IP Address	Page Size(KB)	Response Time (Sec)	Status
Company	admin@company.com	Events/ SearchEventAudit	10/3/2013 2:09 PM	{"UseOptimizedCacheKey":true,"		http://demo.techcello.com:80/Events/ SearchEventAudit	124.30.96.196	21	0	Success
Company	admin@company.com	Dashboard/ ProductDashboard	10/3/2013 2:09 PM	{"UseOptimizedCacheKey":true,"		http://demo.techcello.com:80/Dashboard/ ProductDashboard	124.30.96.196	27	4	Success
Company	admin@company.com	Events/ SearchEventAudit	10/3/2013 1:31 PM	{"UseOptimizedCacheKey":true,"		http://demo.techcello.com:80/Events/ SearchEventAudit	103.5.78.10	36	0	Success
Company	admin@company.com	Events/ SearchEventAudit	10/3/2013 1:30 PM	{"UseOptimizedCacheKey":true,"		http://demo.techcello.com:80/	103.5.78.10	21	1	Success

CelloSaaS Product Analytics Audit

9 Contact Information

Any problem using this guide (or) using Cello Framework. Please feel free to contact us, we will be happy to assist you in getting started with Cello.

Support: <http://support.techcello.com> (or) support@techcello.com

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Phone: +1(609)503-7163