



Protx  
Customer Management Services (CMS)  
User Manual

**Version 1.0 – May 2007**





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## 1 An Introduction to CMS

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This user manual gives a full user guide to the Protx Customer Management Services (CMS) system.

The Protx CMS system has been designed to make the administration of your Protx account as fast and easy as possible.

The Protx CMS system enables you to perform the following functions:

- **Change your billing details**
- **Set up or modify your Direct Debit details**
- **View your current invoice**

In the near future, the CMS system will be extended to allow you to:

- Manage your existing vendor accounts more effectively
- Apply for new accounts
- Change currencies and card types
- Switch fraud prevention options on or off
- Manage your contact details


If you have any questions about this guide, please email [info@protx.com](mailto:info@protx.com). If you have any comments or suggestions, please email [feedback@protx.com](mailto:feedback@protx.com).



## 2 Getting Started with CMS

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### Online Help

CMS has a very useful help system. If you need help whilst on any of the CMS screens, click on the  button at the bottom of the page.

### Accessing CMS

To access CMS type the following URL into your browser window:

<https://customerservices.protx.com>

### The Administrator account: Login for the first time

Protx will send you an email notification informing you of your CMS Administrator login details during May 2007.

If you applied for a Protx account after May 2007, Protx will send you your CMS login details in the confirmation email that is sent to you on submission of your application form.

The first time you login to CMS, you will need to use the Administrator login details sent to you.

The Administrator account allows you to create and administer other user accounts. You will not be able to perform any other functions when you are logged in as an administrator.

**Note: You must create your own User account before you will be able to access the full CMS system.**

Your Administrator account details always remain the same and you should ensure that you keep this information in a safe place.

**If you are unsure of your login details, you can access these easily via the CMS system. This is explained in the next section.**



### 3 Logging into the CMS System

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To log into the CMS system, click the **Customer Login** button on the CMS homepage.

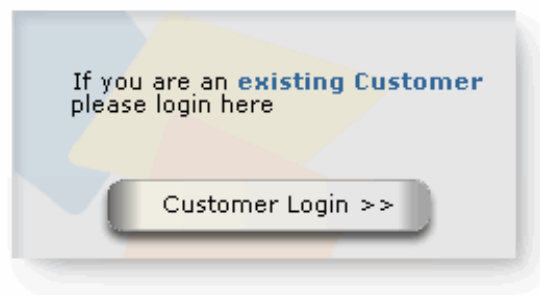
#### Welcome to Protix Customer Management Services

Protix Customer Management Services allows you to edit the details we hold for your Pro change or add billing contact details, view your account history, download or pay outstanding bank details from where your Direct Debit is taken.

[Click here to download the CMS Help Manual.](#)

(Help Manual requires Adobe Acrobat Reader 7.0 or higher. Click [here](#) to download

Please click on the **Customer Login** button below to access the system:



If you have not yet applied for a Protix account, please click here.



Please note: You will need both JavaScript and Cookies enabled to view this Protix also recommend using Internet Explorer or Netscape versions 4 or above. If you are using an older browser version you should consider updating it for security.





You will then be presented with the Customer Login screen:

Customer Login	
Customer Login ID:	<input type="text"/>
Username:	<input type="text"/>
Password:	<input type="password"/>

[forgotten password?](#)

[forgotten login details?](#)

### Your CMS login details

You have been assigned a single Administrator account. The Administrator account will **only** allow you to create and administer other user accounts, from which you will be able to access the entire CMS system.

To login as the Administrator, enter the following information:

- **Customer Login ID**
- **Username**
- **Password**

If you are unsure of your login details, please follow the instructions in the following section.



## 4 Retrieving your Login Details

If you are unsure of your login details, you can access them easily in four simple steps:

- Click on the [forgotten login details?](#) link on the Login page. You will then see the following:

### Retrieve CMS Login Details

**In order for you to access your login details to the CMS system, you will need to perform the following steps:**

1. You will be first required to enter your VSP Vendor Name in the box below.
2. An automated email will be sent to the primary contact against the vendor you specified, containing a link to the the Password Retrieval page. Click on that link.
3. You will now be prompted to enter your name and merchant number assigned to your company by your acquiring bank (without spaces) in the boxes given. If you do not know the merchant number, please refer to the Merchant Agreement document provided by your acquirer. If you have more than one merchant number against your account, you may enter any one of these.
4. If the merchant number you have entered is valid, you will be granted access to a page displaying your login details.

**IMPORTANT: You will ONLY be able to access the Password Retrieval page once. Your access will be logged and subsequent attempts will fail. In order to access the page again, you will need to contact Protx directly at [info@protx.com](mailto:info@protx.com).**

Enter your VSP Vendorname:

Send Email

- Enter your **VSP Vendor Name** and click the [Send Email](#) button (if you have more than one VSP Vendor Name, you may specify any one you wish).

An email will be sent to the primary contact of the vendor account you specified. The email contains a link to a Password Retrieval page allowing you to securely retrieve your password details.

- Click on the link within the email sent to you. This will bring up the Password Retrieval page (see below):

Your Name:

Acquiring Bank Merchant Number:

Submit



- **Enter your name and the merchant number in the fields provided.**  
Ensure you enter the correct merchant number that has been assigned to your company by your acquiring bank. If you do not know the merchant number, please refer to the Merchant Agreement document provided by your acquirer.

If you have more than one merchant number, you may enter any one of these.

Click the  button.

- If the merchant number you have entered is valid, you will be granted access to a page displaying the login details for your Administrator account. **If you incorrectly enter your merchant number, you will need to contact Protix directly at [info@protix.com](mailto:info@protix.com) to unlock this page.**

**Note: Ensure you store your login details in a safe place as you will only be able to access the Password Retrieval page once. Your access will be logged and subsequent attempts will fail. In order to access the page again, you will need to contact Protix directly at [info@protix.com](mailto:info@protix.com).**

Once you have obtained your login details, you are then free to log into the CMS system. The following section explains how to do this.

## Logging into CMS

Now that you have your login details, you are ready to login to CMS. Enter the following information into the Login screen:

- **CMS Customer Login ID** – Enter your unique CMS Customer Login ID
- **Username** – Enter your username.
- **Password** – Enter your password.

If you have forgotten your password, please enter your Customer Login ID and Username and click on the [forgotten password?](#) link. You will be sent an email containing your password.

**Important Note:** Remember the Administrator account **only** allows you to create and administer other user accounts. You will not be able to perform any other functions when you are logged in as an administrator. You must create your own user account in order to access the full CMS system.

**If you become locked out of the Administrator user account, you will need to email [info@protix.com](mailto:info@protix.com) to request that your account be unlocked.**



## 5 Creating User Accounts

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When you have successfully logged in as the admin- only user you will be able to view the User Administration screen (similar to the screenshot below).

You can now create one or more users for yourself as well as for your colleagues and staff. You will have the option to assign permissions to each user, giving you control over which areas of the system each user is allowed access to.

**User Administration**

To create a new user, click on the **New User** button. Click on an existing user to view/edit the permissions for that user.

Manage Users for Mr Pappads				
Display Name	Username	Logged In?	Locked Out?	Admin Rights?
Mr Pappads	admin	Yes	No	Yes

[Create New User](#)

support
help

In the example screenshot given above, only one user currently exists – the Administrator user. The Administrator user will always be shown in orange.

The purpose of the Administrator account is to create other users, modify or delete existing users, and to perform functions such as unlocking users or locking them out of the system.

### Creating other users

Creating a new user is a two step process:

1. You need to enter the new user's details in order to create the user.
2. You need to assign permissions to that user. This means granting them access to various screens and functions within the system (by default, a user is created with no permissions at all). The process involved in this step is described in more detail below.

#### 1. Creating a user



To create a new user, click on the **Create New User** button.

You will now be required to create a new user. You must specify a username, password, display name and email address (which will be used for account notifications).

If you wish, you can also choose to initially disable a user by selecting the **User is Locked Out** checkbox. You can then activate the account later when you are ready.

Additionally, you can select the **User has Admin Rights** checkbox if you wish to grant this user admin privileges (which will allow the user to login and create new users themselves).

When selecting a password, try to ensure you choose a password that is secure: a secure password contains a good combination of upper and lower case letters, numbers and special characters (such as %, & or \$). It is also a good idea to choose a password that is at least eight characters long (you can click on the **Password Tips...** button to view more detailed instructions on choosing a secure password).

If you prefer, you can allow the CMS system to randomly generate a secure password by clicking the **Generate Password** button.

New User Details	
<b>Login Details</b>	
Enter Username:	<input type="text"/> Your username cannot include any spaces.
*Enter Password:	<input type="password"/> <b>Password Tips...</b>
Confirm Password:	<input type="password"/> <b>Generate Password</b> <input type="text"/>
Enter Display Name:	<input type="text"/>
Enter Email Address:	<input type="text"/> Account notifications will be sent to this address.
User is Locked Out:	<input type="checkbox"/>
User has Admin Rights:	<input type="checkbox"/>

\* Passwords must be at least 8 characters in length and use at least 1 uppercase letter, 1 lowercase letter, 1 number and one special character (from the list .!?!\_=%^~\*+ ).

**Save** **Cancel**

When you have entered all the required information, click the **Save** button to save the new user settings.

The new user account will now be listed in the user table. If you ever need to unlock this new user account, change User Account Privileges/VSP Admin Access, or delete a new user account altogether, you will need to log into your Administrator account in order to do so.



**Important Note:** Remember that with all accounts that you create, the CMS Customer Login will remain the same.

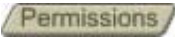
## 2. Assigning permissions to a user

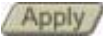
By default a newly created user will have no permissions: they will be able to login, but they will not be able to view any information.

However, if a user has Admin Rights they will still be able to access the Administration screen.

In order for a user to be able to view or edit information, they will need to be assigned the relevant permissions. By default, a new user has no permissions. A user who attempts to access a page without the correct permission will be redirected to an "Access Denied" page.

To manage the permissions assigned to a user, perform the following steps:

Select the user from the table at the top of the screen and click on the  button.

The Permissions panel will be displayed (see below). Tick the relevant checkboxes to grant those permissions to the user. Conversely, untick those checkboxes where you wish to deny the user that permission. Click the  button to save your changes.

Permissions for Joe		
Allow View	Allow Edit	
<input type="checkbox"/>	<input type="checkbox"/>	ALL
<input checked="" type="checkbox"/>		Customer Homepage
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Billing Contact
<input checked="" type="checkbox"/>		Account Statement
<input checked="" type="checkbox"/>		View Invoices
<input checked="" type="checkbox"/>		Receipts
<input checked="" type="checkbox"/>		Credit Notes
<input checked="" type="checkbox"/>		Pay Invoice/Make a Payment on Account
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Direct Debit Instruction



## Managing users

In addition to assigning permissions you are able to perform numerous other functions against a user.



Users are colour-coded in the table depending on their current status. Your Administrator user account will always be shown in orange; all locked out (deactivated) users will be shown in red; and all currently logged-in users will be shown in green.

Manage Users for Mr Harold Smith				
Display Name	Username	Logged In?	Locked Out?	Admin Rights?
Joe Jones	joe	Yes	No	No
John Smith	john	No	No	No
Mr Harold Smith	protx	Yes	No	No

[Create New User](#)

In the above screenshot, the Administrator account (with the username 'protx') is highlighted in orange. The username 'joe' represents a user that is currently logged in, highlighted in green. The username 'john' represents a user that is not logged in, highlighted in white.

To either modify or perform an action against a user, simply click the row in the table. The user you are currently modifying will be highlighted in dark grey:

Manage Users for Mr Harold Smith				
Display Name	Username	Logged In?	Locked Out?	Admin Rights?
Joe Jones	joe	Yes	No	No
John Smith	john	No	Yes	No
Mr Harold Smith	protx	Yes	No	No

[Logout User](#)
[Lock Out User](#)
[Permissions](#)
[Edit User](#)
[Delete User](#)
[Create New User](#)

In the example above, we can see that the user Joe Jones (who is currently logged in) is selected. Additionally, John Smith is coloured red because he is locked out (i.e. user 'john' will not be able to login; his account is currently inactive).

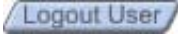

**Important Note:** A user is automatically locked out of the system if they incorrectly enter their password three times in a row. They will not be able to log back into the system unless you unlock them.

## Performing functions against a user

You can perform a number of functions against a user:

- Click the [Edit User](#) button to amend the user's Display Name or password, or to grant/revoke admin rights to the user.
- Click [Delete User](#) to permanently remove the user from the system.
- If a user is locked out, click the [Unlock User](#) button to reactivate the user. Similarly, if the user is currently active, the [Lock Out User](#) button will be displayed, allowing you to deactivate the account. This function can be used if you do not wish to grant a user access to your CMS account.



- Additionally, if the selected user is currently logged in elsewhere, you can click  to forcefully log the user out of the system (this will take immediate effect).
- As explained above, you can click the  button to grant/revoke permissions against a user at any time (allowing the user view or edit access to different parts of the system).



## 6 Navigating Around the CMS System

The CMS system provides a menu on the left-hand pane to allow a user to navigate easily around the system. The screenshot below shows a currently logged-in user.

Note that an Administrative user would only see the 'User Administration' link in the menu, and would not have access to this page.

An explanation of the different sections of the screen has been provided below:

You are currently logged in as **Joe Jones** [1] Logged in at 27/04/2007 12:14:02 [Logout](#) [2]

- ▶ Home
- ▶ Customer
  - Home
  - ▶ Your Details
  - Billing Contact [3]
  - ▶ Your Account
  - Account Statement
  - Direct Debit Details
  - User Administration [7]
- ▶ Support

### Edit Billing Contact

You can enter new contact details or amend your existing billing contact below. When you have finished, click the **Save** button to save your changes.

Billing Contact	
Contact Name:	<input type="text" value="Joe Jones"/> *
Address:	<input type="text" value="22 Soho Square London"/> *
e-Mail Address:	<input type="text" value="joe.jones@protx.com"/> *
Phone Number:	<input type="text" value="0123456789"/> *
Fax Number:	<input type="text"/>
Mobile Number:	<input type="text"/>
Email service announcements & updates:	<input checked="" type="checkbox"/>
Email newsletters & promotions:	<input checked="" type="checkbox"/>

\* denotes mandatory fields



1. **User name and timestamp:** the name of the user and the time the user logged in are displayed at the top of the screen.
2. **Logout button:** the user should click this button when they wish to exit the system.
3. **Highlighted menu item:** this indicates the page the user is currently on.



- 4. Link to the Technical Support website (<http://techsupport.protx.com>):** this links to a comprehensive resource that includes extensive technical advice, fraud advice and merchant advice, covering everything from how to integrate your payment solution with Protx to how to apply for a merchant account.
- 5. Page-sensitive help:** this gives the user further information on the different functions available on their current screen and how to use them.
- 6. Site Footer:** this links to the CMS terms of use, security policy and privacy policy. It also allows users to send feedback on both the CMS site and their experience with Protx in general.
- 7. Link to User Admin section:** if the user has administrative privileges (as in the example screenshot) a link to the User Administration page will also appear in the menu.



## 7 The Customer Homepage

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After you log into the CMS system, you will be presented with the following page, giving you an overview of your CMS account:

**Harold Smith Stationary Ltd.**

Welcome
Billing Contact
Direct Debit

**Welcome to your Account**


Click on the function you wish to perform:



**Edit your Billing contact**


This allows you to edit the Billing Contact details we hold for your account.

The Billing Contact you specify will receive all monthly invoices, credit notes and billing information associated with this account.



**View your Account Statement**

This allows you to view your Account Statement, which lists all invoices, Direct Debits and credits made to you your account. You can also download, save and print any invoices or receipts associated with your account.



**Edit your Direct Debit details**

This allows you to set up a new Direct Debit Instruction or edit existing Direct Debit details using our secure and easy-to-use wizard (all the normal Direct Debit safeguards and guarantees apply). This is how your monthly payments to Protx are made.

The **Welcome** tab provides links to the three main functions available to the user:

1. Editing billing contact details
2. Viewing account statements and invoices
3. Setting up or editing Direct Debit instructions.

You can click on the **Billing Contact** or **Direct Debit** tabs to view your current billing contact or Direct Debit details.

You can also navigate to these functions using the menu in the left-hand pane of the screen.

Users who do not have privileges to view or edit the billing contact, account statement or Direct Debit details will be presented with an **Access Denied** message (see assigning permissions to a user above). In such instances, the user should



contact their account administrator, not Protx, who will be able to grant them the appropriate privileges.

If you require help at any point or if you need an explanation whilst in any parts of the system, you can view page-specific help by clicking on the [help ?](#) link.

The following section provides a detailed breakdown of these three functions.



## 8 View/Edit Billing Contact


This section allows you to modify the billing contact on your Protx account. The billing contact receives monthly invoices, credit notes and billing information. If details of your billing contact change, you should modify them here to ensure that all invoices and billing related information is relayed to the right person.

Click on **Edit your billing contact** from the Customer homepage to get to the screen below:

Billing Contact	
Contact Name:	Joe Jones *
Address:	22 Soho Square London *
e-Mail Address:	joejones@protx.com *
Phone Number:	0123456789 *
Fax Number:	
Mobile Number:	
Email service announcements & updates:	<input checked="" type="checkbox"/>
Email newsletters & promotions:	<input checked="" type="checkbox"/>

\* denotes mandatory fields

This screen will contain the current billing contact information that is listed on your Protx account. You can make minor adjustments or choose to change the billing contact information entirely. You can also choose whether or not your billing contact receives service announcements and updates as well as newsletters and information about Protx promotions.

Once the new billing contact information has been entered, click the  button to commit your changes.



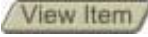
## 9 View Account Statement

The **View Account Statement** section allows you to view credits and debits made against your Protix account on or after the 1<sup>st</sup> April 2007. This allows you to view your account history and all payments taken by Protix at a glance.

On the example Account Statement below we have provided a number of examples, including the account opening balance, standard monthly charge and other charges based on a 'per transaction' basis.

**Important Note:** The Receipts and Credit Notes tabs are features that are currently not available. The Invoices tab is available, but only for invoices dated after April 1<sup>st</sup> 2007. Please contact the Protix Accounts team at [accounts@protix.com](mailto:accounts@protix.com) for any enquiries relating to invoices dated **before** April 2007.

Account Statement					
Reference	Transaction No	Date	Details	Amount	Amt O/S
4078	4449	18-04-2007	Small Business Service	23.50	23.50
2977	2556	01-07-2003	Small Business Service	23.50	
08	111	01-04-2003	Opening Balance	44.34	
1315	234840	31-01-2003	Authorised transactions from 01/01/2003 to 31/01/2003	32.07	
1238	234775	31-12-2002	Authorised transactions to 31/12/2002	12.27	

To view invoices dated **after** 1<sup>st</sup> April 2007, you need to select the row in the table where the item you wish to view is listed, and click on the  button that appears (see the screenshot below). This lets you view the item you have selected in a printable format. You also have the option to save the invoice in PDF format<sup>1</sup> too.

**Important Note:** In order to view and print any account items you will first need to download and install a copy of Adobe Acrobat Reader. You can download the software at the following link:

<http://www.adobe.com/products/acrobat/readstep2.html>

In the example given above there is a transaction shown in red. This represents a payment that has not been made to Protix as expected. In this example there is an outstanding balance of £23.50 on the account. The CMS system allows you to pay your outstanding balance by clicking on the table row (see the screenshot on the following page):

<sup>1</sup> PDF stands for Portable Document Format. It's a distribution format developed by Adobe Corporation to allow electronic information to be transferred between various types of computers. The software which allows this transfer is called Acrobat. In order to view and print any invoice items you will first need to download and install a copy of Adobe Acrobat Reader.



**ALL** Invoices Receipts Credit Notes

#### Account Statement

Reference	Transaction No	Date	Details	Amount	Amt O/S
4078	4449	18-04-2007	Small Business Service	23.50	23.50
2977	2556	01-07-2003	Small Business Service	23.50	
OB	111	01-04-2003	Opening Balance	44.34	
1315	234840	31-01-2003	Authorised transactions from 01/01/2003 to 31/01/2003	32.07	
1238	234775	31-12-2002	Authorised transactions to 31/12/2002	12.27	

[View Item](#)

[Pay Invoice Now...](#)

You will be given the option to pay the invoice if you wish. Click on [Pay Invoice Now...](#) to pay the outstanding amount using your debit or credit card (see below):

#### Invoice Details

<b>Reference No:</b>	4078
<b>Date:</b>	18/04/2007
<b>Details:</b>	Small Business Service
<b>Invoice Amount:</b>	<b>£23.50</b>
<b>Amount Outstanding:</b>	<b>£23.50</b>
<b>Amount to Pay:</b>	<b>£23.50</b>

Click the **Proceed to Payment Page** button to make a payment of **£23.50**.

Alternatively, click the **Back** button to return to the previous page.

[Proceed to payment page >>](#)

[<< Back](#)

If you select to pay the invoice, you will first be given the opportunity to review the details and ensure you are paying the correct amount for our services. If you are happy with this summary, you will need to click [Proceed to payment page >>](#). You will then be presented with the Protix payment page, where you will be required to enter your card details (you will also be given the option of confirming or cancelling the payment before authorisation takes place).

For further information, click on the [help ?](#) link on the payment page for more detailed instructions.



## 10 View/Edit Direct Debit Details

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The View/Edit Direct Debit Details section allows you to submit new Direct Debit details or edit existing Direct Debit details. **Please ensure that you have an up-to-date and current Direct Debit Instruction.**

To enter new Direct Debit details you will need to follow a simple four-step procedure:

1. Tick to say that you have read and accepted our terms and conditions
2. Enter your bank account details
3. Confirm your bank account details
4. Enter an email address so that we can send you a confirmation email.

Protx will take payment by direct debit on a monthly basis.


To complete the Direct Debit instruction, you will need the following details to hand:

- Bank account number
- Bank sort code
- The full address of your bank including the post code

You will be presented with a screen similar to the one on the following page where you will be prompted to enter your bank account details:



ProtX Ltd 22 Soho Square London W1D 4NS	<b>Instruction to your Bank or Building Society to pay by Direct Debit</b>
Name of Bank Account Holder <input type="text" value="Harold Smith Ltd"/>	Originator's Identification Number <input type="text" value="948598"/>
Bank/Building Society Account Number <input type="text" value="12345678"/>	Reference Number (Not Mandatory) <input type="text"/>
Bank Sort Code <input type="text" value="12"/> - <input type="text" value="34"/> - <input type="text" value="56"/>	<b>Instruction to your Bank/Building Society</b>
Name of your Bank/Building Society <input type="text" value="Barclays"/>	Please pay ProtX Ltd Direct Debits from the account detailed in this instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with ProtX Ltd and, if so, details will be passed electronically to my bank/building society.
Postal Address of Bank/Building Society <input type="text" value="Barclays London"/>	Today's Date <input type="text" value="11/04/2007"/>
Postal Code of Bank/Building Society <input type="text" value="W1D4NS"/>	
Banks and Building Societies may not accept Direct Debit Instructions for some types of account	

When you have entered your bank account details you will need to click the  button to proceed to the confirmation screen (see the next page). Please ensure that the details entered are accurate.

**Confirmation**

These are the details that you have entered for your Direct Debit Instruction.

Please click on the **Next** button to submit your Direct Debit Instruction to Protx.

If you would like to change some of these details then please click on the **Back** button.

The collection of funds will be made on or just after the 16th of each month. Therefore your collections will begin on or just after the 16th of May.

The company name which will appear on your bank statements against the Direct Debit will be **Protx Ltd**.

**Your Details**

<b>Name of Bank Account Holder:</b>	Harold Smith Ltd
<b>Account Number:</b>	123456
<b>Sort Code:</b>	12-34-56
<b>Bank Name:</b>	Barclays
<b>Bank Address:</b>	Barclays London
<b>Bank Postcode:</b>	W1D4NS
<b>Reference Number:</b>	

[<< Back](#) [Next >>](#) [Cancel](#)

By clicking the [Next >>](#) button at this point you are confirming the details you have entered. Protx will now use these details to take monthly payments by direct debit.

The final screen will ask you to enter an email address so that we can send you an email confirming the new Direct Debit Instruction.

**Your Direct Debit Instruction has been changed**

To receive a confirmation email, enter your email address below and click the **Send Email** button.

We will not use this email address for any other purpose. If you do not receive your email confirmation for whatever reason, please contact us and we will be happy to send you a confirmation by post.

Confirmation Email Address:

[<< Back](#) [Send Email](#)

Once you have done this, you will see an on-screen confirmation message that your new instruction is now active, shortly followed by your confirmation email.