

Telstra Enterprise – Telstra Order Exchange (TOX) Customer Portal

Company Profile Management

Business unit
Telstra Enterprise

Issue date
12/08/2026

Document ID
CP13

Audience

Enterprise Customer **Administrator** using Telstra Order Exchange (TOX) Customer Portal.

Summary

The purpose of this document is to provide detailed step by step instructions with screen views on how to access and use the functionality within the **Company Profile** dropdown link, located on the Home page. The features shown in this work instruction is from the Admin user perspective.

Please note that Customer Administrator will no longer have the ability to create or edit users within the TOX interface. In this instance, they need to get in touch with their corresponding service support contact to put in the request.

Note: The below table which identifies the capabilities against the different user types for Telstra Order Exchange.

Permission	Primary Admin	Admin User	Premium User	Standard user	Read-Only Premium without ordering	DES Only
Manage Company Profile						
Edit Organisation	Yes	Yes	No	No	No	No
Add, Change Delivery Address	Yes	Yes	No	No	No	No
Add New User Group	Yes	Yes	No	No	No	No
Add New User	No	No	No	No	No	No
Edit User	No	No	No	No	No	No
Deactivate User	No	No	No	No	No	No
Reactivate User	No	No	No	No	No	No
Map Product Type to User Group	Yes	Yes	No	No	No	No
Add, Map Users to the User Groups	No	No	No	No	No	No
Map Billing A/C Number to User Group	Yes	Yes	No	No	No	No
Delete Users	No	No	No	No	No	No
Delete User Groups	Yes	Yes	No	No	No	No
View Billing Accounts tab	Yes	Yes	No	No	No	No
Edit Billing Accounts	Yes	Yes	No	No	No	No
Receive email notification on all order	Yes	No	No	No	No	No
Request lease enablement/ View lease details	Yes	Yes	No	No	No	No

CP13 Company Profile Management



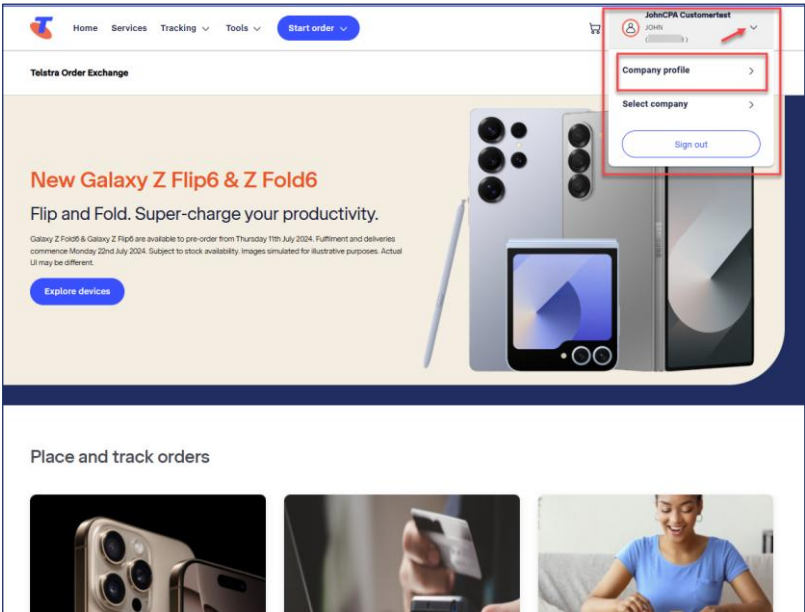
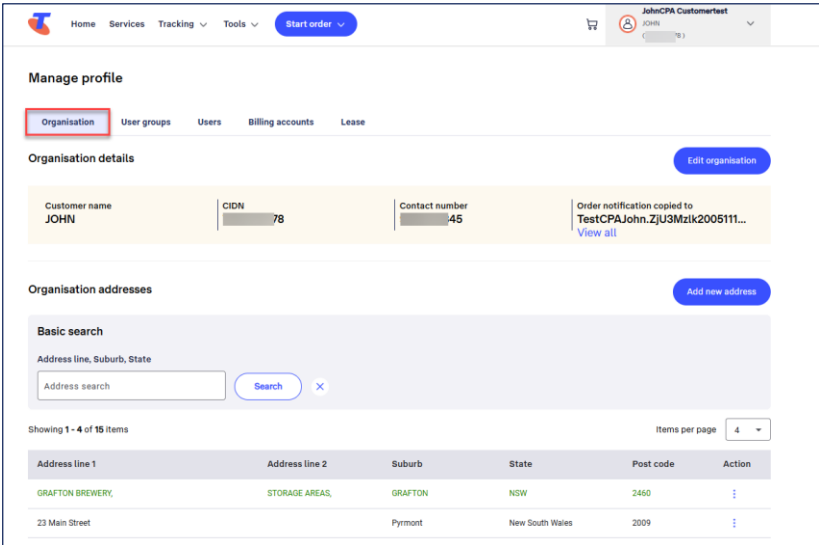
Permission	Primary Admin	Admin User	Premium User	Standard user	Read-Only Premium without ordering	DES Only
Ordering / Customer Management						
Order Device and Plans	Yes	Yes	Yes	Yes	Yes*	No
View stock levels	Yes	Yes	Yes	Yes	Yes*	No
Map devices to DES	Yes	Yes	Yes	Yes	Yes*	No
Add address in checkout	Yes	Yes	Yes	Yes	Yes*	No
Reporting (Reports Tile)	Yes	Yes	Yes	No	Yes*	No
View Asset Details	Yes	Yes	Yes	Yes	Yes	No
View & Update Services	Yes	Yes	Yes	Yes	Yes*	No
View All orders	Yes	Yes	Yes^	No	Yes	No
Cancel Orders	Yes	Yes	Yes	Yes	Yes	No
Export All Orders	Yes	Yes	Yes	No	Yes	No
Replace SIM	Yes	Yes	Yes	Yes	Yes*	No
Return Devices	Yes	Yes	Yes	Yes	Yes*	No
View return orders (via tracking menu option)	Yes^	Yes	Yes	Yes	Yes*	Yes^
Mobility Fleet care report	Yes	Yes	No	No	No	No
Add, Change Mobile Plans (Change Plan)	Yes	Yes	Yes	Yes	Yes*	No
Order dashboard	Yes	Yes	Yes	Yes	No	No
View DES Dashboard	Yes	Yes	Yes**	Yes**	No	Yes
DES settings	Yes	Yes	Yes	Yes	No	Yes
DES devices	Yes	Yes	Yes**	Yes**	No	Yes**
Enrol DES devices	Yes	Yes	Yes**	Yes**	No	Yes**
Withdraw DES devices	Yes	Yes	Yes**	Yes**	No	Yes**
Disown DES devices	Yes	Yes	Yes**	Yes**	No	Yes**

Legend:

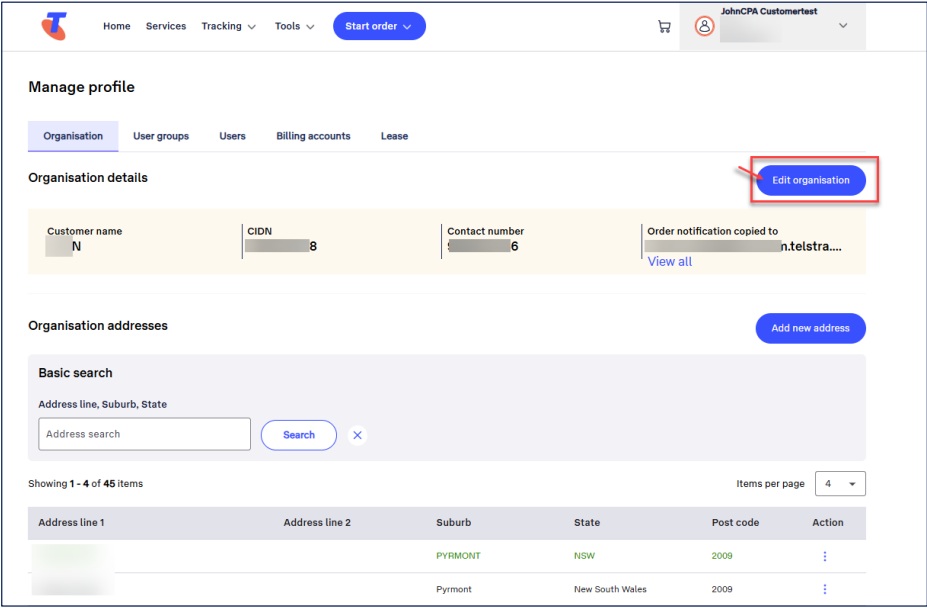
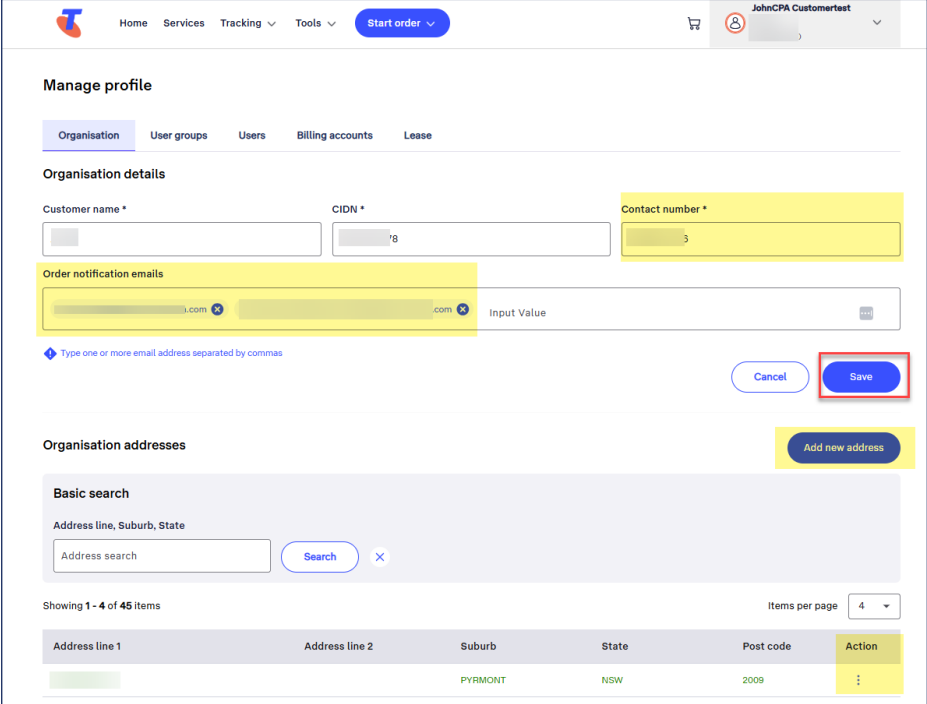
Yes* = Read Only

Yes** = if permission is given

Yes^ = coming soon

Step	Description	Detailed Actions
1	Log in to the TOX Customer Portal. On the Home page, click on the dropdown on the upper right of the page (next to the username). Then, select Company profile.	
2	You will then get navigated to the Organisation page.	



Step	Description	Detailed Actions
3	Update Organisation Details The Organisation tab within Manage Company Profile allows authorised administrators to maintain company-level information, including: - organisation contact details - order notification email recipients - delivery / return addresses Information managed within this tab is used throughout the TOX ordering process, including address selection during checkout and distribution of order-related notifications. To do this, click on Edit organisation button.	
4	Review all the details as highlighted and make updates accordingly: • Contact Number • Order Notification Emails • Add New Address • Modify Existing Address (3 dots under Action column) Note: The Order notification emails field is used to receive automated order-related notifications, including dispatch and delivery updates. Notifications are sent in addition to the Primary Admin nominated in the Company Profile. Click Save button to confirm changes and continue.	

CP13 Company Profile Management



Step	Description	Detailed Actions
5	If you need to add address details, click on Add new address button. Any address listed will be available to select in a dropdown list as delivery/ return address options during the ordering flow.	The screenshot shows the 'Manage profile' page with the 'Add new address' button highlighted in a red box. The page displays organisation details and a list of organisation addresses.
6	Type in the address on the highlighted field and select the correct/complete address from the generated list. Click Save. Note: Address should NOT be a PO box address	The screenshot shows the 'Add organisation address' form. The 'Save' button is highlighted with a red box. A note indicates that the delivery address must be a street address for the business, not a PO box address.
7	If you need to edit/change an existing address, click the corresponding 3 dots under Action column and click View & Edit as highlighted in the screenshot.	The screenshot shows the 'Organisation addresses' table. The 'View & Edit' button for the address '59 STRUCHBREE RD' is highlighted with a red box. The table lists various addresses with their details and action options.

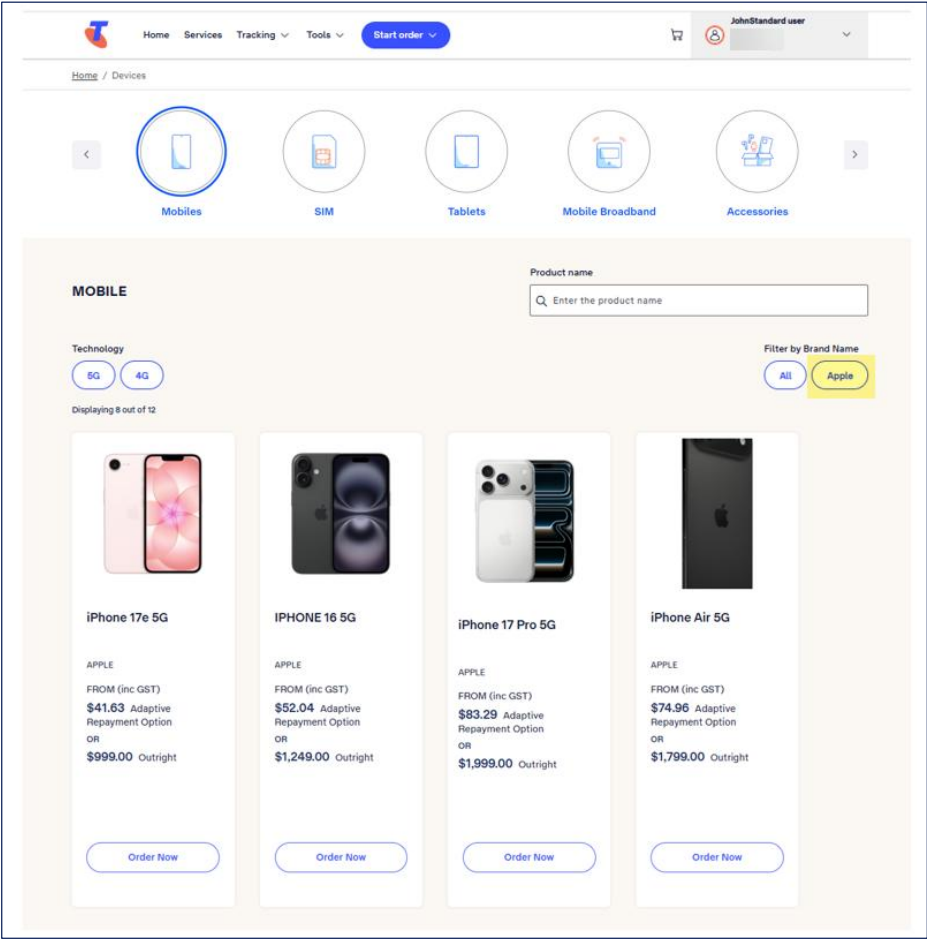
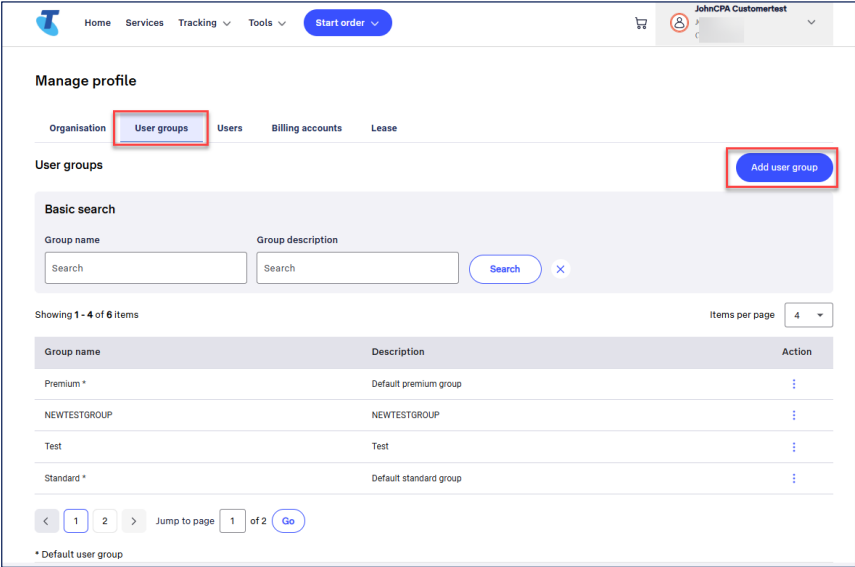


Step	Description	Detailed Actions
8	The selected address will be shown as highlighted in yellow. Type in the correct address on the Select address field and select from the generated list. Click on Update button to confirm the changes.	
9	User Groups Click on the User Groups menu as highlighted. There are 3 default user groups: • Admin* • Standard* • Premium* As stated in the 'Group Description' screenshot, all these default user groups automatically get accessed to all products in the catalogue or can order all available products/devices. The only difference in their access level is on the Admin Functions.	

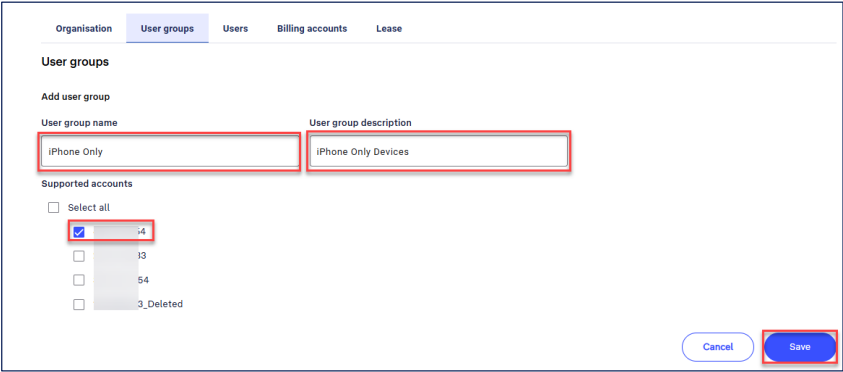
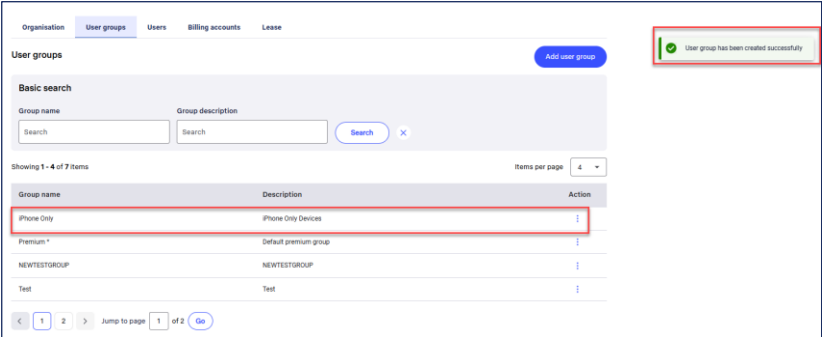
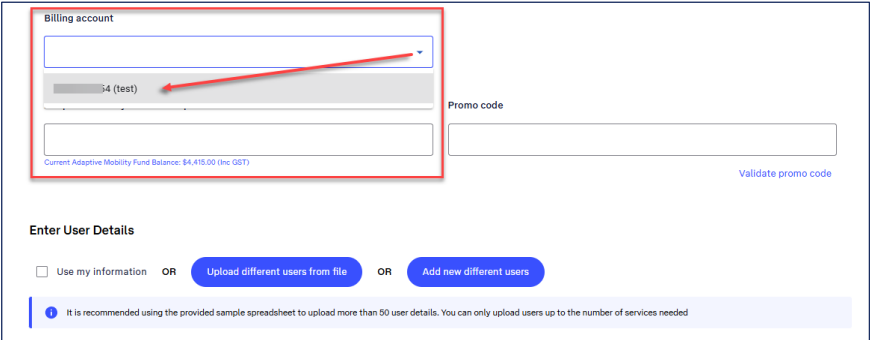


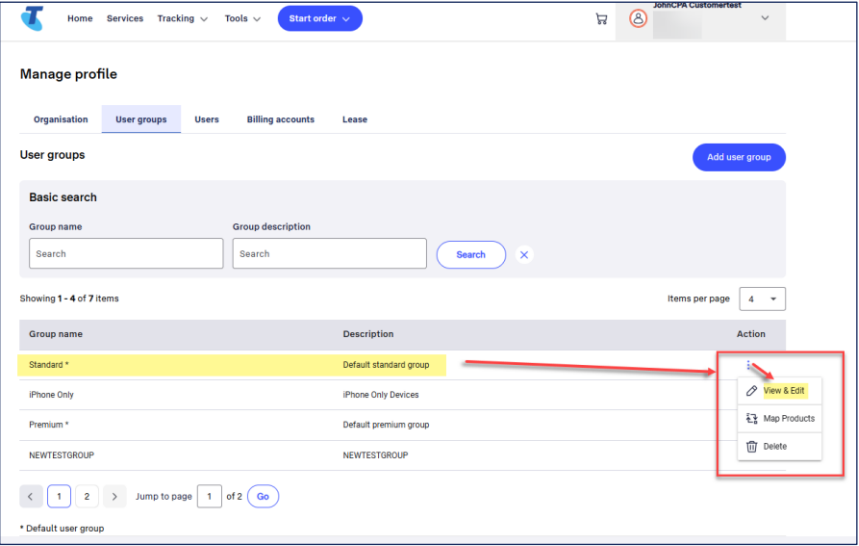
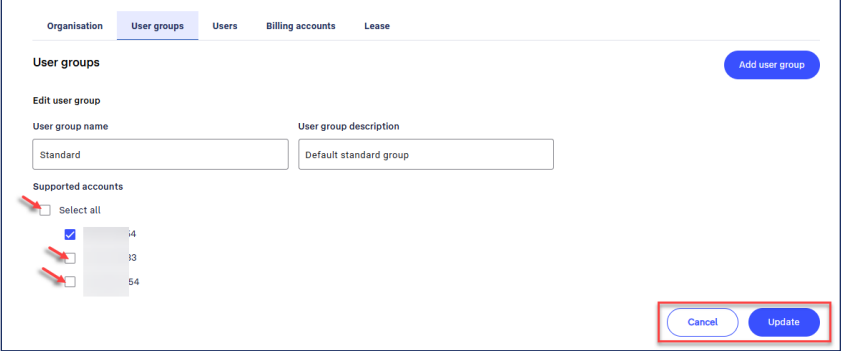
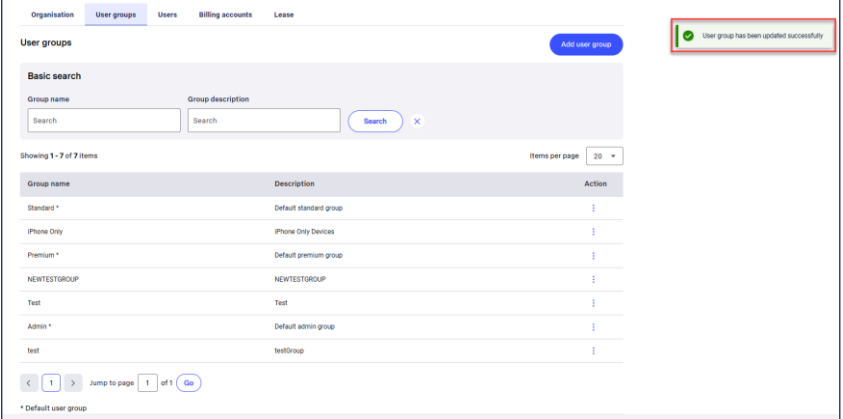
Step	Description	Detailed Actions															
10	User groups allow you to limit what staff members can order and against what billing account(s) they can charge to. Example: Some of your employees may only have permission to order iPhone devices. In this scenario, a user group named “iPhone Only” is created and mapped products that are Apple iPhone devices only. Notes: • (*) Default User Groups who get ordering access to all available products automatically. • Others without *, will only have ordering access to specified products in the catalogue. • Any newly created User Group will have a blank product catalog (no products shown in the ordering catalog). You need to map products for the new user group as stated in step 19.	Home Services Tracking Tools Start order Shopping cart Account Test Manage profile Organisation User groups Users Billing accounts Lease User groups Add user group Basic search Group name Group description Search Search Search X Showing 1 - 4 of 91 items Items per page 4 <table><thead><tr><th>Group name</th><th>Description</th><th>Action</th></tr></thead><tbody><tr><td>iPhone Only</td><td>iPhone Only Devices</td><td></td></tr><tr><td>Admin *</td><td>Admin functions. All available products automatically get mapped to user</td><td></td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr></tbody></table> < 1 2 3 > Jump to page 1 of 23 Go * Default user group	Group name	Description	Action	iPhone Only	iPhone Only Devices		Admin *	Admin functions. All available products automatically get mapped to user							
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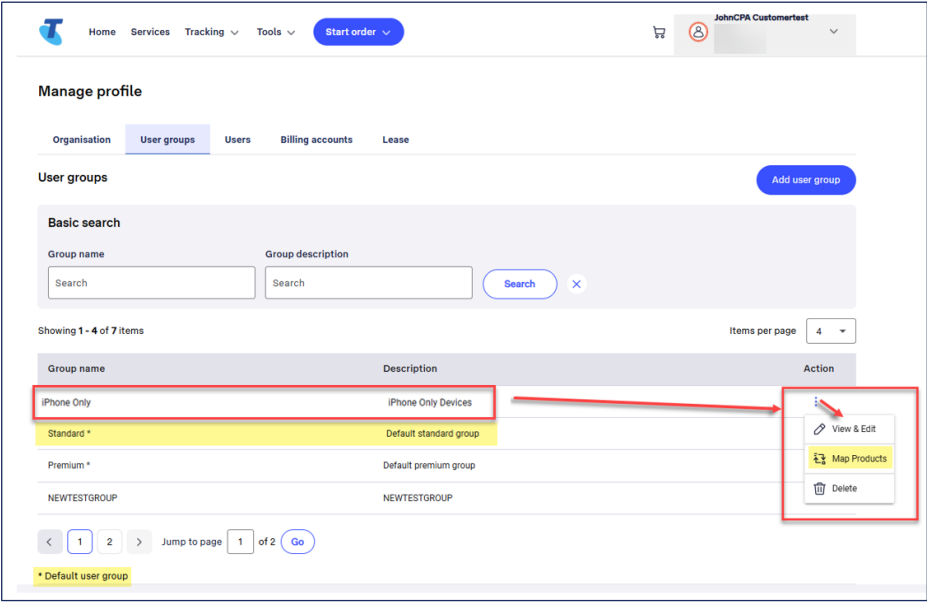
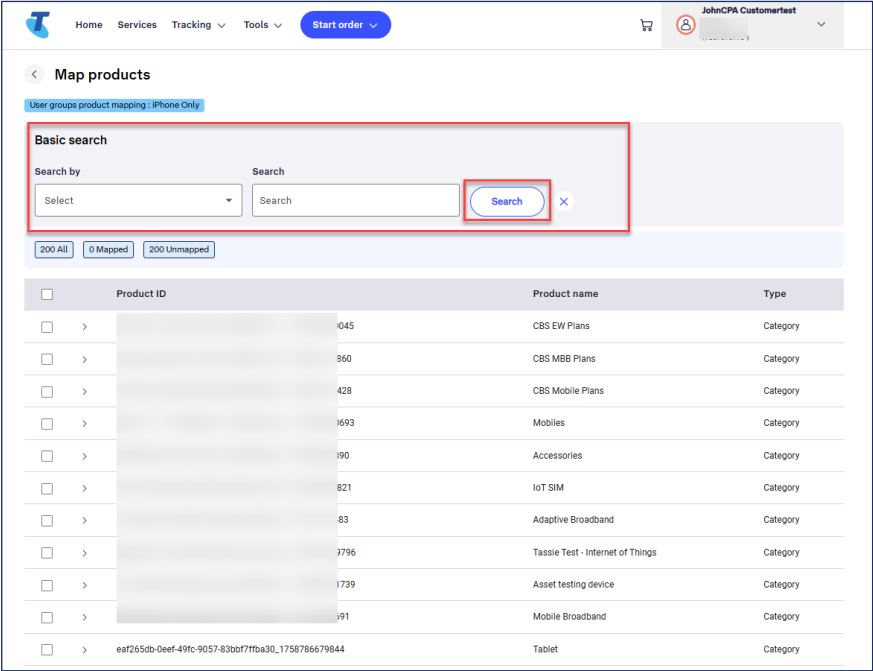
Step	Description	Detailed Actions															
11	This screenshot is an example of a product catalogue when a User is associated to “ iPhone Only ” user group and map this user group to Only Apple iPhones .																
12	Create / Add User Groups Click on Add user group button under User groups tab.	 <table><thead><tr><th>Group name</th><th>Description</th><th>Action</th></tr></thead><tbody><tr><td>Premium *</td><td>Default premium group</td><td>⋮</td></tr><tr><td>NEWTESTGROUP</td><td>NEWTESTGROUP</td><td>⋮</td></tr><tr><td>Test</td><td>Test</td><td>⋮</td></tr><tr><td>Standard *</td><td>Default standard group</td><td>⋮</td></tr></tbody></table>	Group name	Description	Action	Premium *	Default premium group	⋮	NEWTESTGROUP	NEWTESTGROUP	⋮	Test	Test	⋮	Standard *	Default standard group	⋮
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NEWTESTGROUP	NEWTESTGROUP	⋮															
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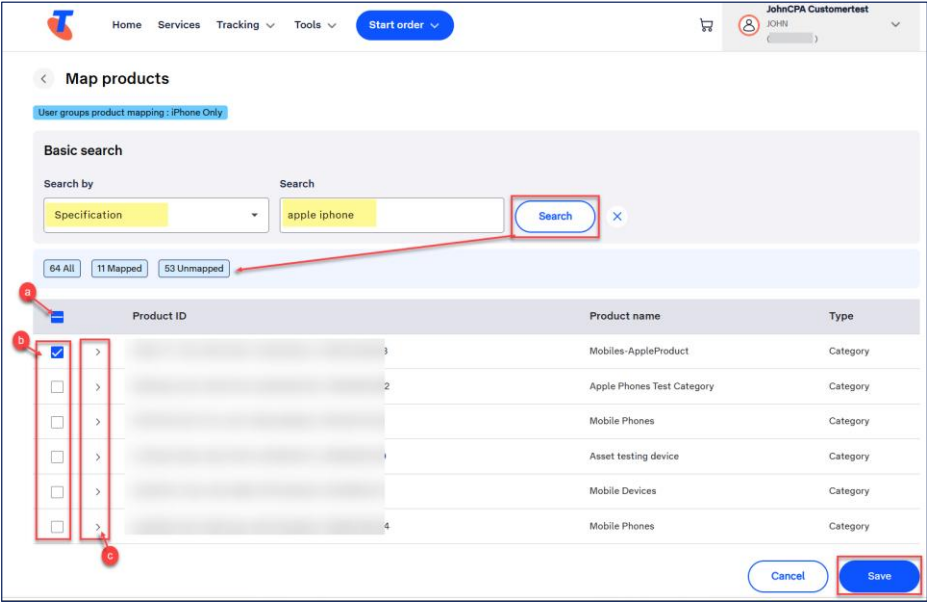
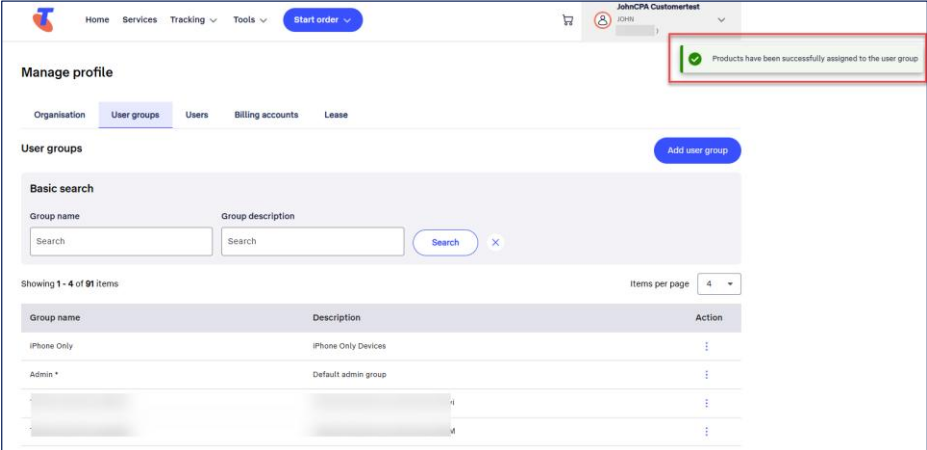


Step	Description	Detailed Actions
13	Type the Group name and Description. Select the Supported Accounts for your new User Group and click Save. Note: This newly created user group can only bill to the selected account as highlighted.	
14	A pop-up notification on the upper right of the page will appear advising: <i>User group has been created successfully</i>. Notes: - The new user group can be seen in the user group list. In this example, the new user group is 'iPhone Only'. - After creating the user group, you need to map products against this newly created user group. Otherwise, product catalog will be blank during the ordering flow for all users that will be associated to this newly created user group. - To map products to user group, go to step 19.	
15	This is the sample screenshot during the ordering process which shows that only 1x billing account (as per step 13) is visible.	

Step	Description	Detailed Actions
16	Edit User Groups Click on the 3 dots against a specific user group. Then, select View & Edit from the list. In this example, Standard user group will be edited.	
17	You will get navigated to the list of Supported Accounts against the user group selected above. Put a tick against Select All box as necessary or select only the billing account(s) the user group can charge to. Click Update to continue. Click Cancel to exit. Note: In this screenshot example, only 1 account will be available during the ordering flow for Standard users as only 1 account has been ticked.	
18	A pop-up notification on the upper right of the page will appear advising: <i>User group has been updated successfully.</i>	



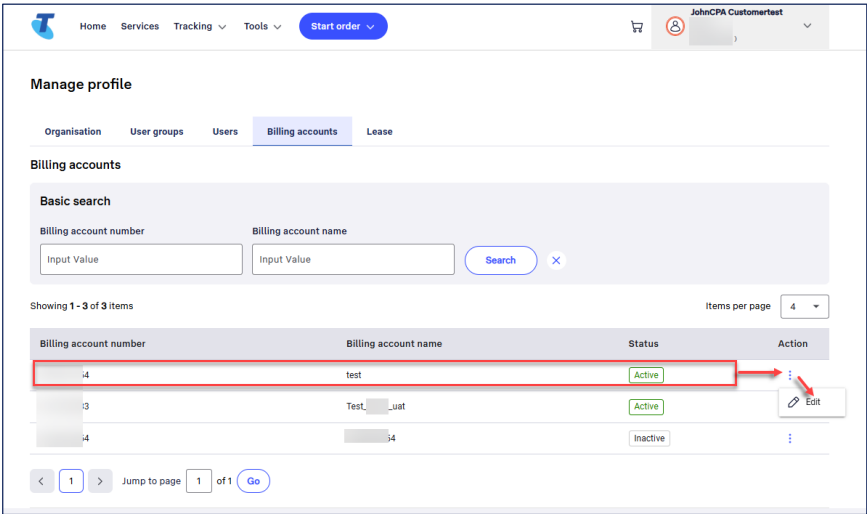
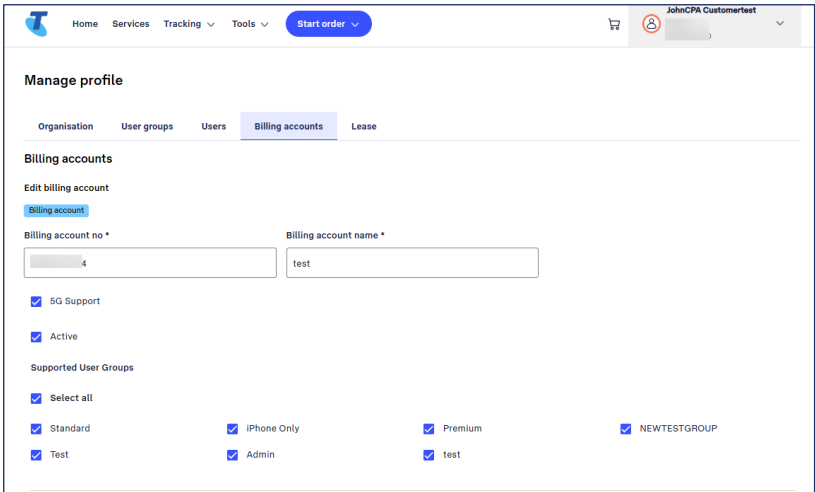
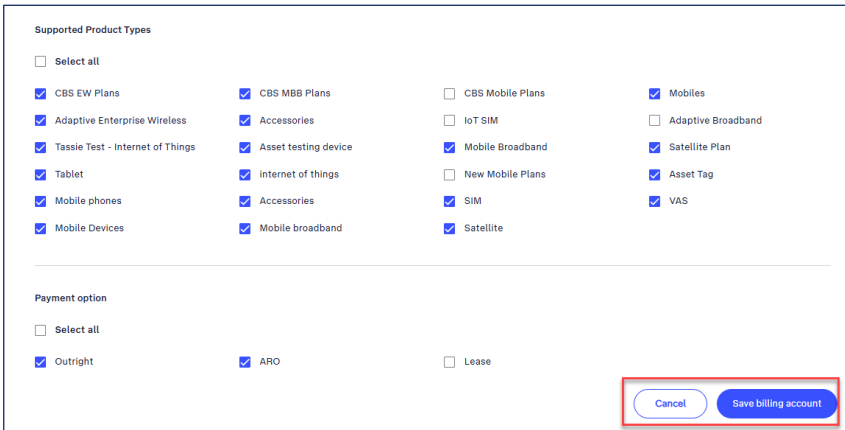
Step	Description	Detailed Actions
19	<u>Mapping of Products to the User Groups</u> Click on the 3 dots against a specific user group. Then, select Map Products from the list. Notes: - User Group Name with (*), are automatically getting updated with new devices. All available products automatically get mapped to the user under these user groups. This means user can see all products in the catalog. - An Administrator can edit / map products of a user group by clicking on the corresponding 3 dots in the action column to control the product catalog view of a user in the user group.	 The screenshot shows the 'Manage profile' page with the 'User groups' tab selected. A table lists user groups with columns for Group name, Group description, and Action. The 'iPhone Only' group is highlighted. A red box highlights the 'Action' column for 'iPhone Only', showing a dropdown menu with options: View & Edit, Map Products, and Delete. A red arrow points from the 'Map Products' option to the 'Map products' page screenshot.
20	You will get navigated to the list of products a <u>User</u> in the <u>User Group</u> can choose from during the ordering process. Use the Basic Search fields to filter the products you need to map against the user group.	 The screenshot shows the 'Map products' page. It features a 'Basic search' section with a 'Search by' dropdown and a 'Search' input field. Below the search section, there are filters for '200 All', '0 Mapped', and '200 Unmapped'. A table lists products with columns for Product ID, Product name, and Type. The 'Product ID' column is highlighted with a red box.

Step	Description	Detailed Actions
21	In this example, we chose to search per Specification as stated in the dropdown field and filtered for all Apple iPhones. a) You can put a tick on the top box to select all the searched items on the list. b) Or you can select individual box as per your requirement. c) For more details on the product line item, click on the arrow to expand the list Click on the Save button once selection as has been finalised. Note: In this screenshot example, only Apple iPhone devices in the catalog will be visible to <i>iPhone Only</i> user group. (Refer to screenshot example in step 11)	
22	A pop-up notification on the upper right of the page will appear advising: <i>Products has been successfully assigned to the user group.</i>	



Step	Description	Detailed Actions
23	Users Click on Users tab in the Manage Profile page. This will display all users within your organisation, which User Group they are aligned to, what access level they have within the group and the status of their registration. Example: User ‘JohnStandard user’ is aligned to User Group ‘iPhone Only’ and their access level is ‘Standard’ and their registration is ‘Active’. Note: Customer Administrator will no longer have the ability to create or edit users within the TOX interface. In this instance, they need to get in touch with their corresponding service support contact to put in the request.	
24	Billing Accounts Click Billing Accounts tab to view the list of accounts mapped to the company profile and the 3 dots icon to see specific billing account details. Note: Billing accounts are automated based on Telstra’s core systems. New/Old accounts may take 3-5 days to populate.	



Step	Description	Detailed Actions
25	Select an Active billing account by clicking on the 3 dots icon next to the desired billing record. Click Edit to configure the supported groups and product type of the billing account . Note: Billing Account Configuration will dictate the account visible during the ordering flow depending on the user group a user is associated with.	
26	Select or unselect from the list of Supported User Groups. Note: The Billing Account Name is displayed during the ordering process when selecting the account to which the order charges will be applied.	
27	Scroll down and select or unselect from the list of Supported Product Types and Payment Option. Click Save Billing Account to keep the changes. Click on Cancel to revert any changes done on the billing account details.	



Step	Description	Detailed Actions															
28	Download Lease Agreement Click the Lease tab to view your current lease facility details. This page is read-only and provides a summary of your current leasing facility, including the lease partner, facility start and end dates, approved facility amount, and current facility balance. The Lease facility history section shows previous facility changes for reference. To download a copy of your lease agreement, click on Download lease agreement. Note: The lease agreement is an important document that outlines the commercial terms of the leasing arrangement, including key obligations, funding limits, and the financing terms for leased assets. Customers may need this document for internal procurement, finance, audit, or record-keeping purposes.	The screenshot shows the 'Manage profile' page with the 'Lease' tab selected. The 'Master lease agreement' section contains a 'Download lease agreement' button. The 'Lease facility history' table displays the following data: <table><thead><tr><th>Lease facility (Inc GST)</th><th>Start date</th><th>End date</th></tr></thead><tbody><tr><td>\$100000.00 Current facility</td><td>2026-07-08</td><td>2028-08-01</td></tr><tr><td>\$100000.00</td><td>2026-07-08</td><td>2028-07-08</td></tr><tr><td>\$100000.00</td><td>2026-07-02</td><td>2028-07-08</td></tr><tr><td>\$1.00</td><td>2026-07-02</td><td>2028-07-02</td></tr></tbody></table>	Lease facility (Inc GST)	Start date	End date	\$100000.00 Current facility	2026-07-08	2028-08-01	\$100000.00	2026-07-08	2028-07-08	\$100000.00	2026-07-02	2028-07-08	\$1.00	2026-07-02	2028-07-02
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\$100000.00 Current facility	2026-07-08	2028-08-01															
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\$1.00	2026-07-02	2028-07-02															
end of process / steps																	