
Telstra Enterprise – Telstra Order Exchange (TOX) Customer Portal

Admin User of Primary Company to Manage Associated Company Profile

Business unit
Telstra Enterprise

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Audience

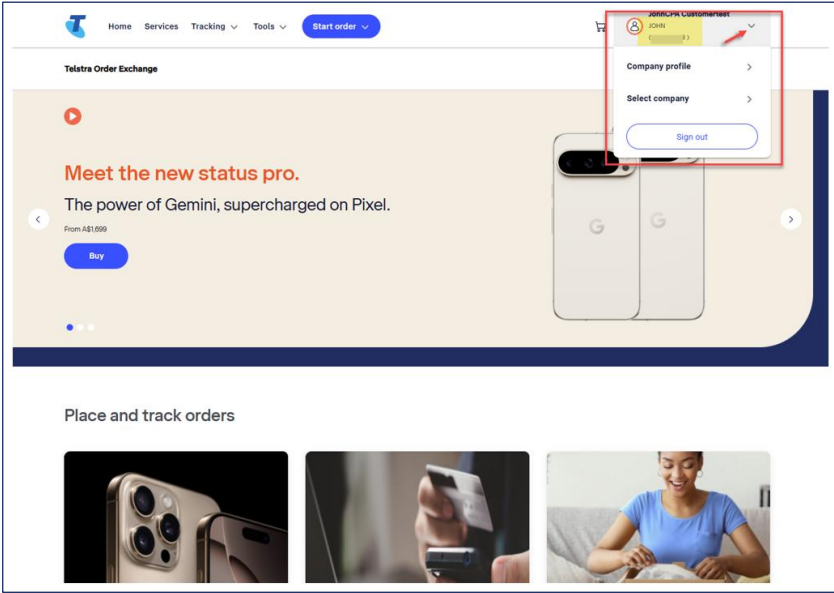
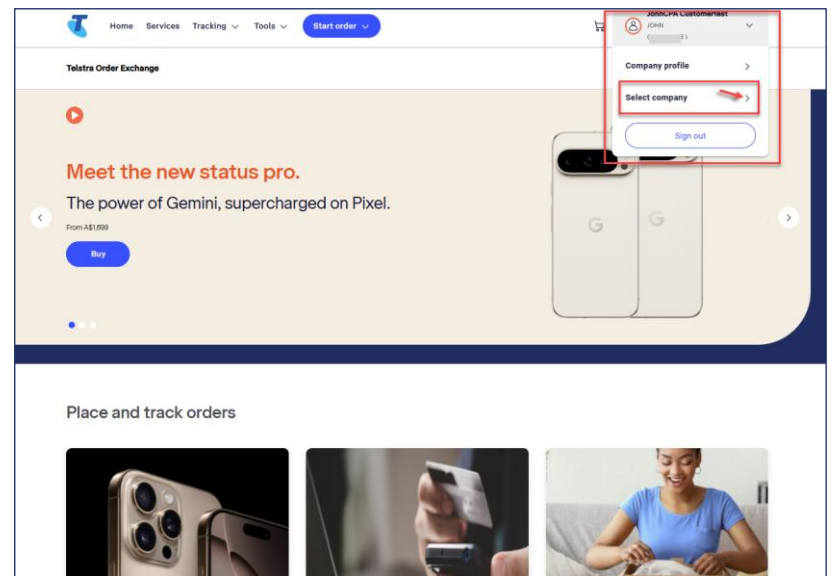
Enterprise Customer Administrator using Telstra Order Exchange (TOX) Customer Portal.

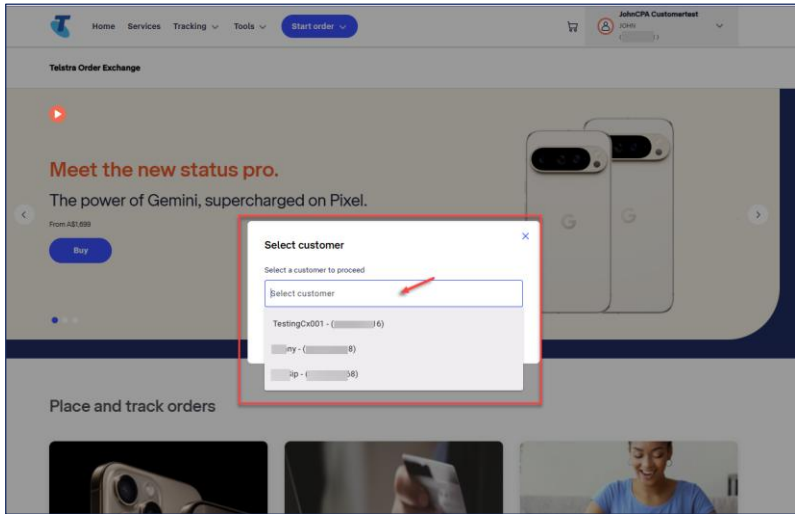
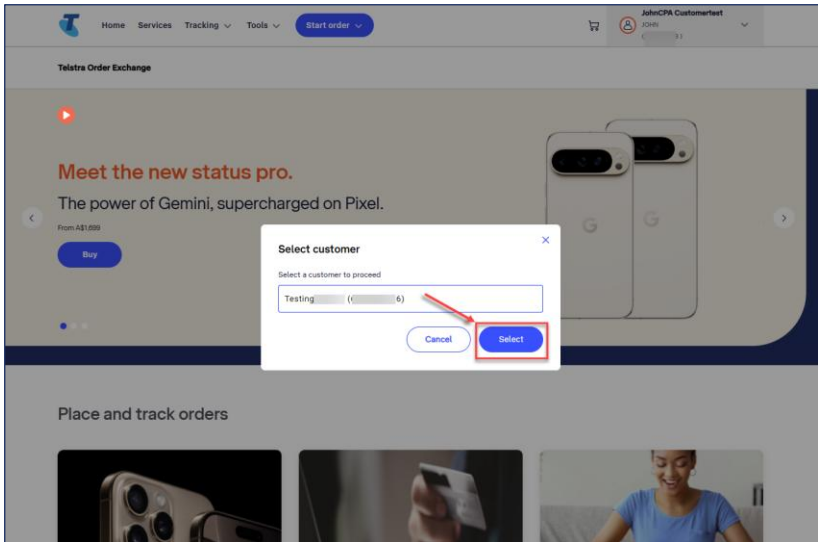
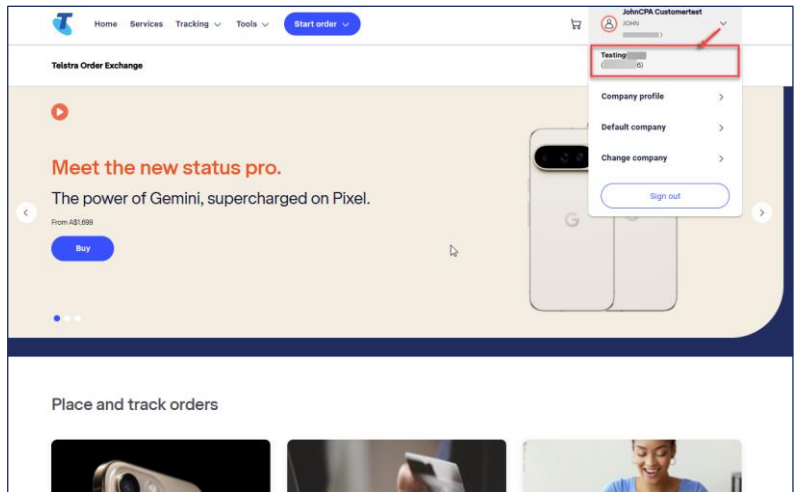
Summary

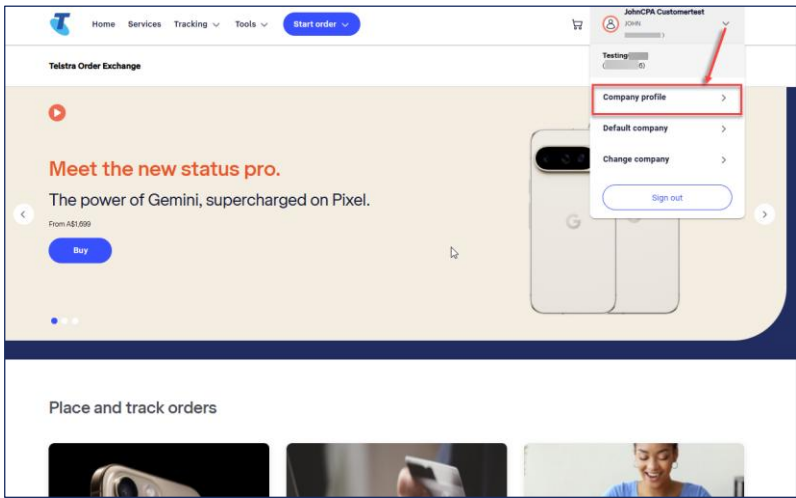
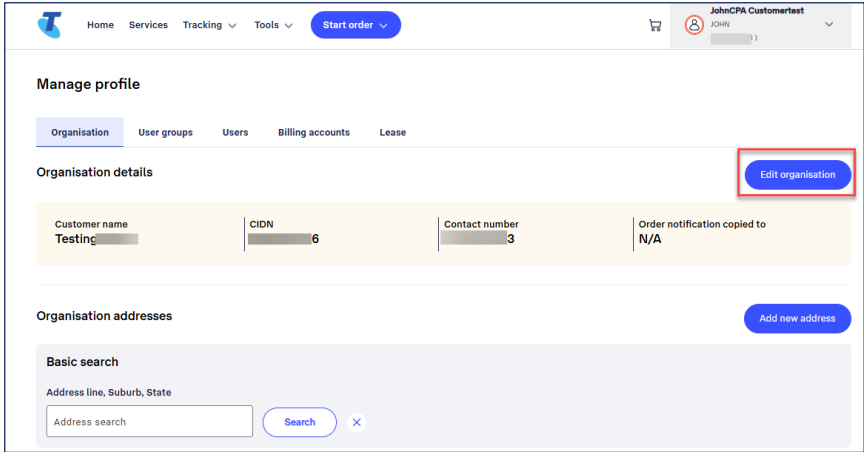
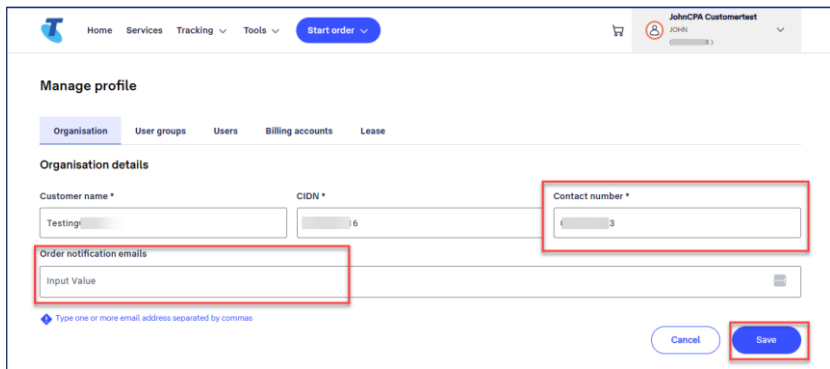
The purpose of this document is to provide detailed step by step instructions with screen views on how Customer Administrators of **Primary Company Profile** (also known as Parent / Ultimate CIDN) are able to access and use **Manage Company Profile** functionality within the **Associated Company Profile** (also known as Child CIDN ([Customer Identification Number](#))).

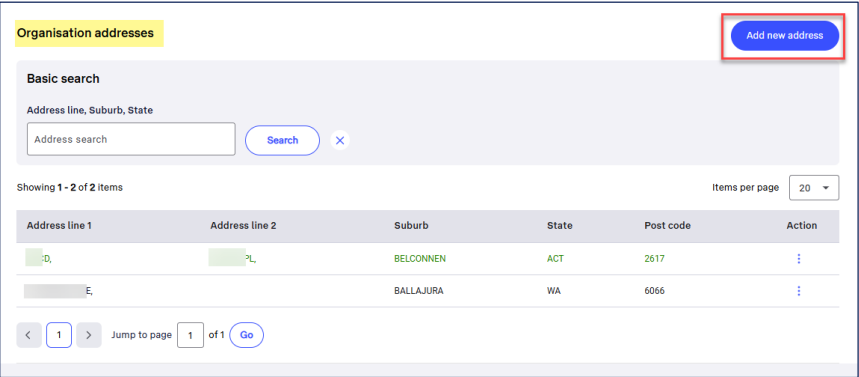
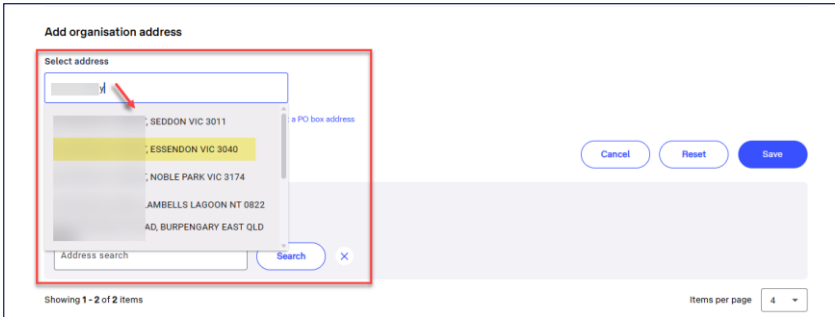
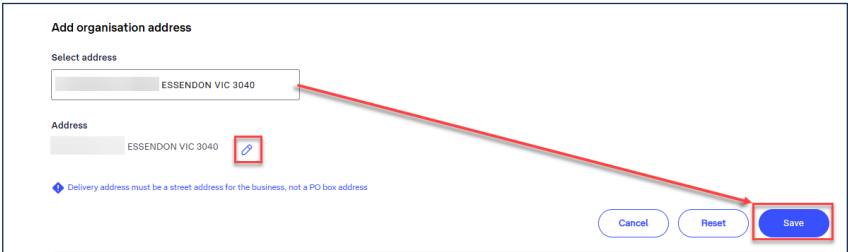
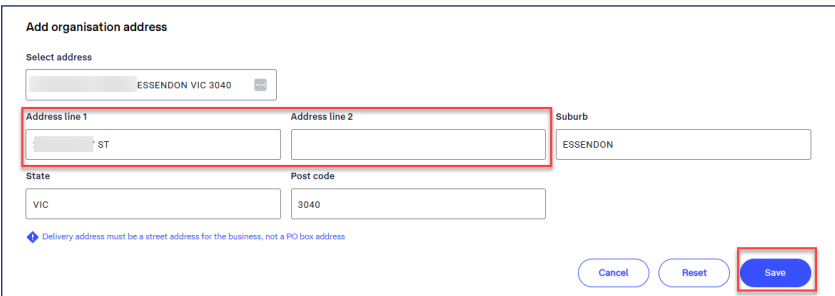
This document will also illustrate how an Admin of the **Parent Company** will get permission to access / manage the **Child Company** and how to verify the list of Admin Users who has access to this child company.

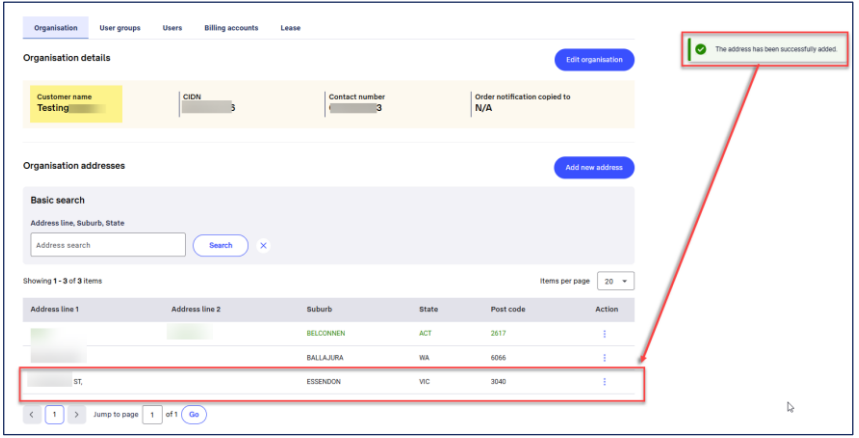
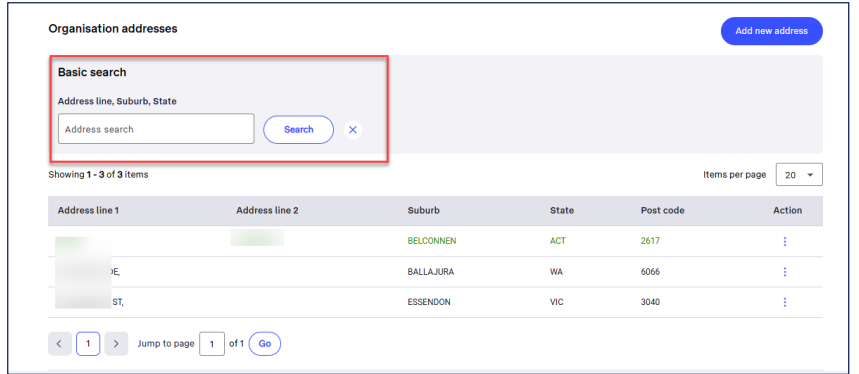
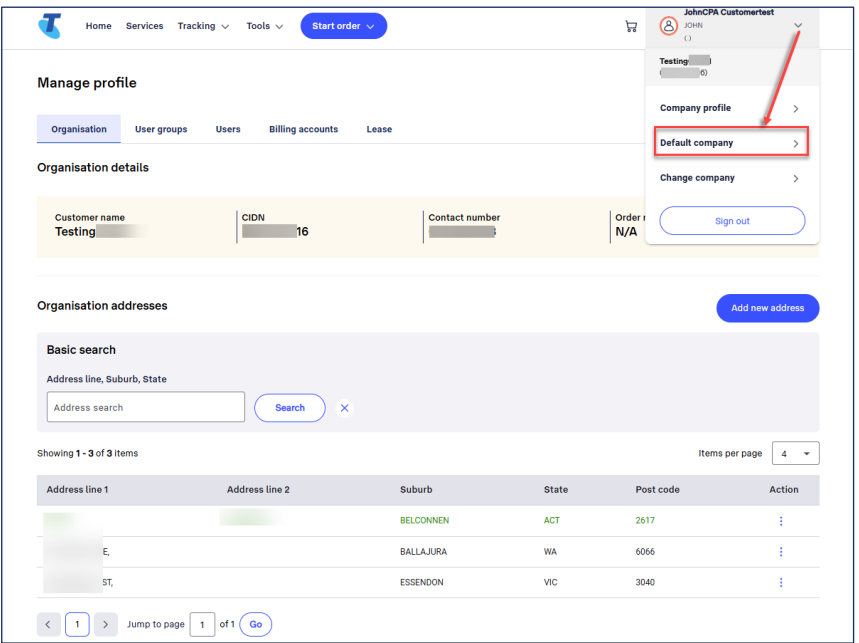
Note: Parent CIDN and Ultimate CIDN will be used interchangeably in this section.

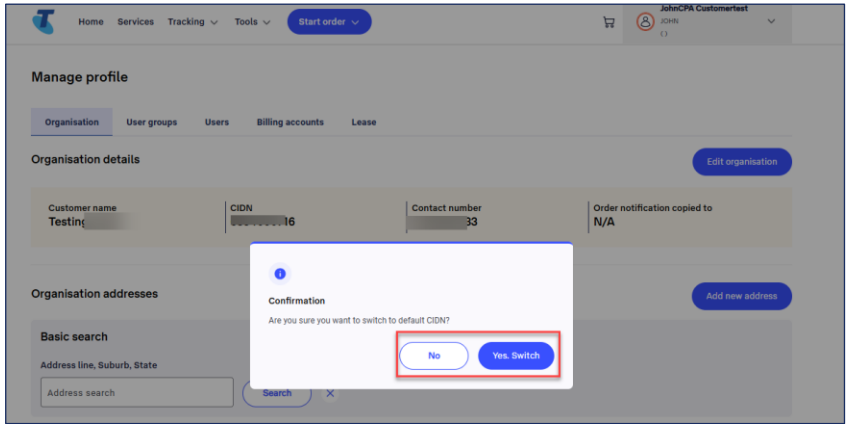
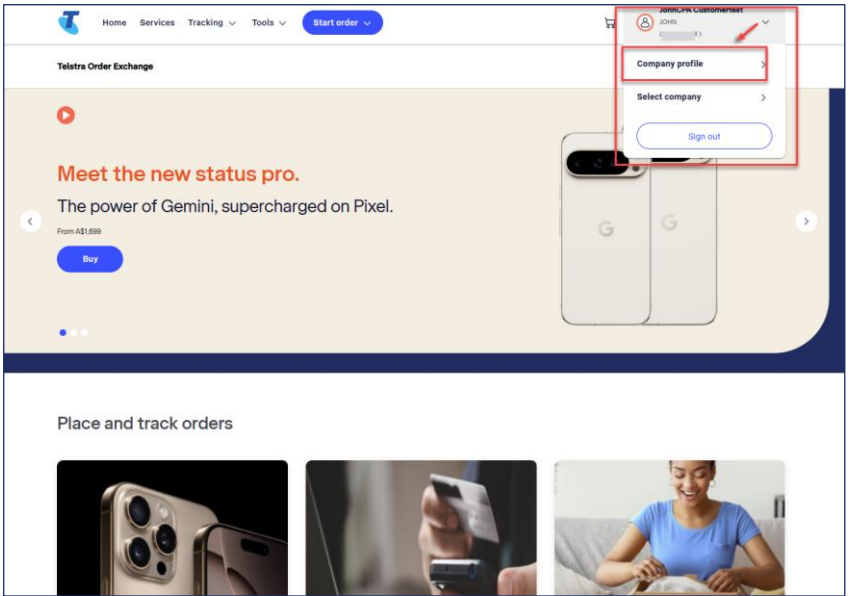
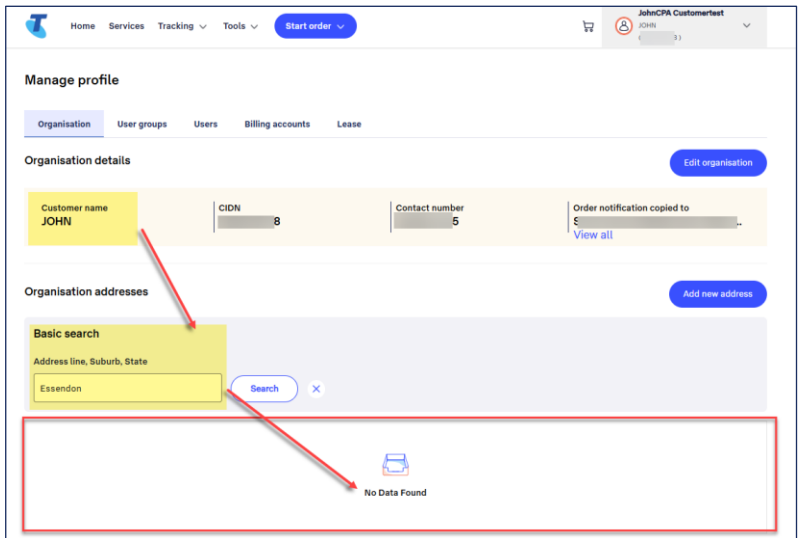
Step	Description	Detailed Actions
1	Log in to the TOX Customer Portal. On the Home page, click on the dropdown on the upper right of the page (next to the username). This is the section where you can switch between Parent CIDN and Child CIDN. Note: Parent CIDN is defaulted in the customer dropdown list. In this example 'JOHN' is the Parent Company and CIDN is intentionally blurred.	
2	Click on Select Company dropdown arrow to see the list of all Child/Linked CIDN.	

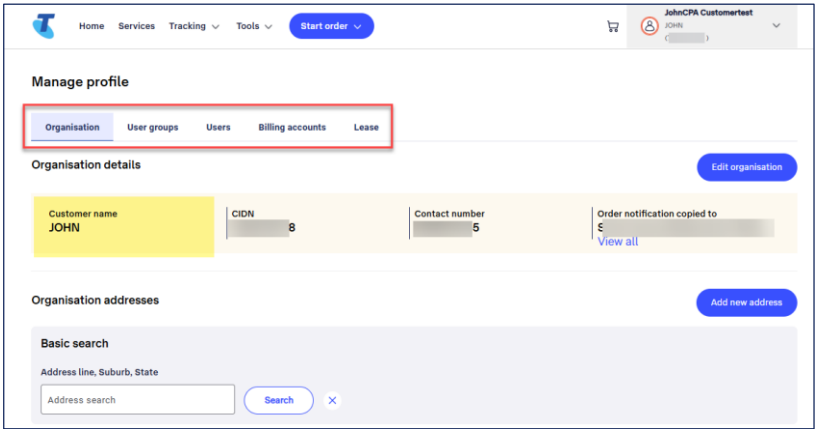
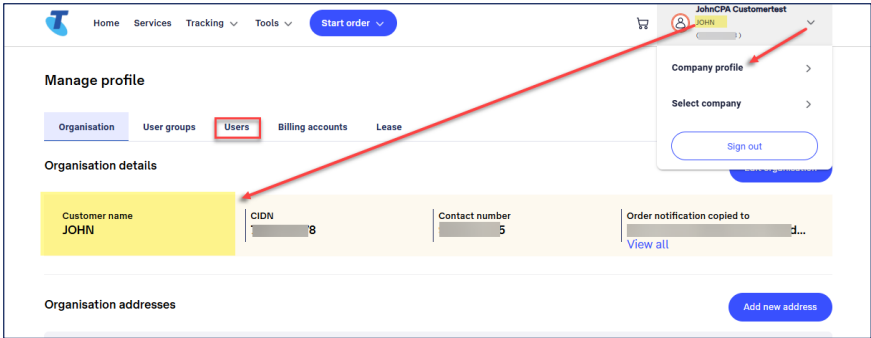
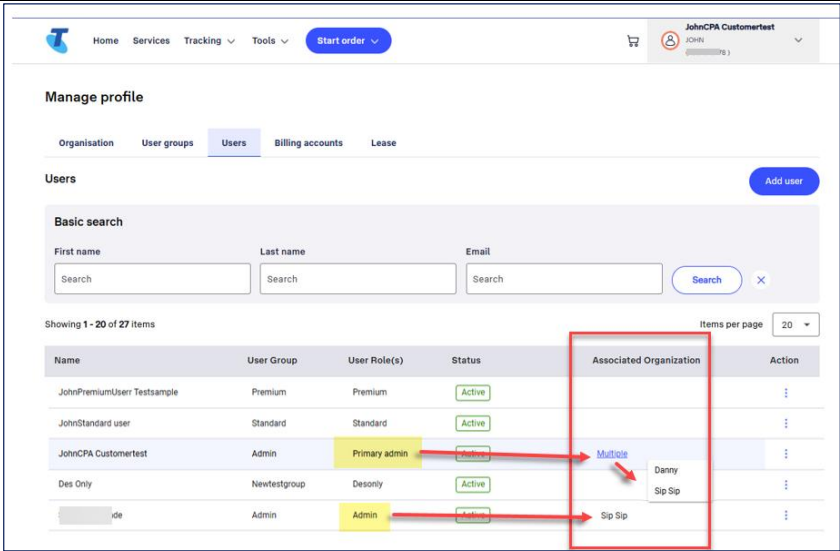
Step	Description	Detailed Actions
3	A pop-up message will appear to select a customer. Click on the field to see the list of Child Customer/CIDN. Note: In this example, Parent CIDN has 3 Child/Linked CIDNs associated to it.	
4	For this example, select the Child CIDN from the dropdown list which you need the Organisation details to be edited. Click on Select button once the field is populated with the chosen customer.	
5	Click on the dropdown on the upper right of the page (next to the username). The selected Child/Linked CIDN is now showing in the list.	

Step	Description	Detailed Actions
6	To edit the details of the selected Child CIDN, click on Company Profile in the list.	
7	Review the organisation details and click on Edit Organisation button to make changes as required.	
8	You can update the two fields as per below: - Contact Number - Order Notification Emails Click Save to confirm changes and continue. 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.	

Step	Description	Detailed Actions
9	If you need to add an address to the selected Child CIDN, scroll down to the Organisation Addresses section. Click on Add New Address button.	
10	Search the new address from the designated field as highlighted. Then, select the correct address from the list provided. If the address is not on the list, select an address that match the <i>Suburb, Post Code, and State</i>. In this example, we choose the 2nd record from the dropdown list.	
11a	If you were able to locate the correct address from the list, click on Save button. Otherwise, click on the pencil icon to modify the address details.	
11b	You can modify Address Line 1 and 2 as highlighted with the correct details. Note: City / Suburb, State and Post Code cannot be edited. If this is incorrect, go back to the step above. Click on Save button.	

Step	Description	Detailed Actions
12a	A pop-up message will appear on top of the page stating that a new address has been successfully added. Note: Scroll down to the Organisation Addresses section of the Child CIDN and you will see the newly created address record as highlighted.	 The screenshot shows the 'Organisation details' section with fields for Customer name (Testing), CIDN (3), Contact number (3), and Order notification copied to (N/A). Below this is the 'Organisation addresses' section with a 'Basic search' field and a 'Search' button. A table lists three address records: BELCONNEN, ACT, 2617; BALLAJURA, WA, 6066; and ESSENDON, VIC, 3040. The last record is highlighted with a red box. A red arrow points from a green notification bubble at the top right to this record.
12b	In the event, there is a long list of addresses, you can search the newly created address by using the basic search field as highlighted to see that the record has been added.	 The screenshot shows the 'Organisation addresses' section with a 'Basic search' field and a 'Search' button. A table lists three address records: BELCONNEN, ACT, 2617; BALLAJURA, WA, 6066; and ESSENDON, VIC, 3040. The last record is highlighted with a red box.
13	Note that this newly added address cannot be searched in the Parent/Ultimate CIDN Organisation page. To check this, switch back to Parent CIDN Profile by clicking on the drop down arrow on the top right of page. Then select Default Company.	 The screenshot shows the 'Manage profile' section with tabs for Organisation, User groups, Users, Billing accounts, and Lease. Below this is the 'Organisation details' section with fields for Customer name (Testing), CIDN (16), Contact number, and Order notification copied to (N/A). Below this is the 'Organisation addresses' section with a 'Basic search' field and a 'Search' button. A table lists three address records: BELCONNEN, ACT, 2617; BALLAJURA, WA, 6066; and ESSENDON, VIC, 3040. The last record is highlighted with a red box. A red arrow points from a dropdown menu at the top right to the 'Default company' option.

Step	Description	Detailed Actions
14	A pop-up message will appear on your screen to confirm your action. Select Yes, Switch to proceed accessing the Parent CIDN profile. Select No, to exit the view.	
15	You will get navigated back to the Home Page. Click on the dropdown arrow on the top right of page and select Company Profile to access the Parent CIDN profile.	
16	Search the newly created address from the search field. Note: The newly created address is not searchable or visible under Parent CIDN Profile.	

Step	Description	Detailed Actions
17	Detailed steps in modifying these tabs are available in Work Instructions: CP13 TOX Company Profile Management Important! Ensure that you are in the correct Parent or Child CIDN Organisation details page before modifying the company profile details as stated in each tab.	
18	<u>How to verify the list of Admin Users who has access to the Associated Organisations or Child CIDN.</u> Access the Parent / Ultimate CIDN profile by following the previous steps above. Note: Always check the Customer Name field to ensure you are on the correct profile page. Click on the Users menu.	
19	You can see on Associated Organisations column the Administrator Users who has access to Child CIDN. Notes: • “Multiple” in Associated Organisation column means that the Parent / Ultimate CIDN has 2 or more Child CIDNs associated to it and that the Admin Users can access these Child CIDNs. Otherwise, the company name of that single Child CIDN will be written here. • If you clicked on the Multiple link, you would see the list of associated Child CIDN.	
end of process / steps		