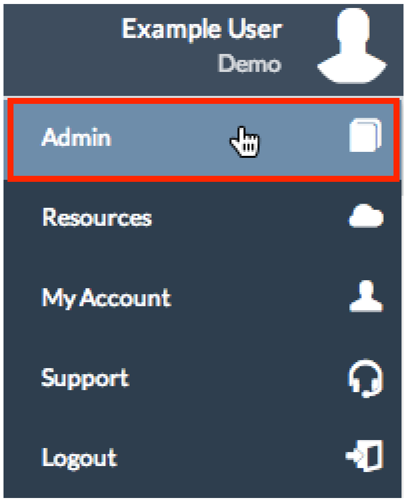
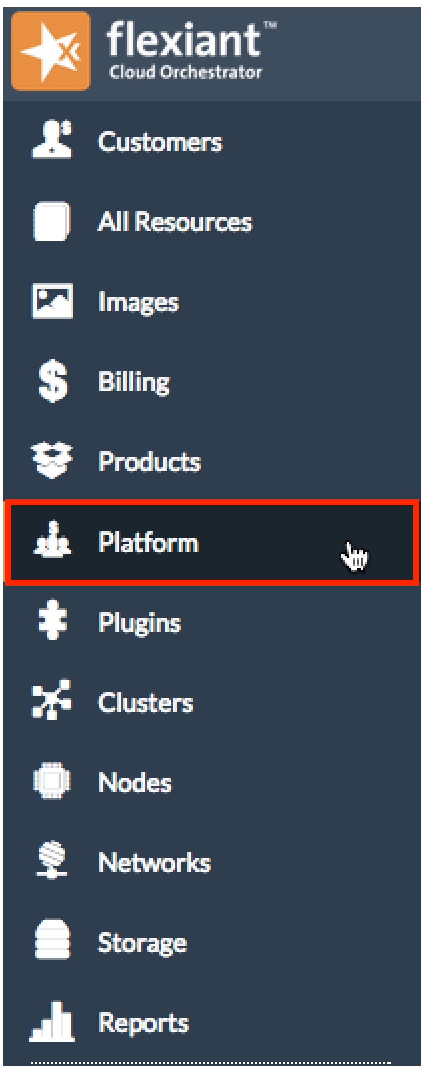
Managing a Billing Entity

To manage a billing entity:

1. Show the Admin page by clicking the **Admin** link in the page navigation menu.

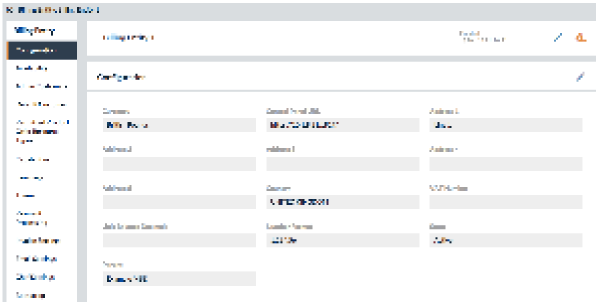


2. Click on the **Platform** tab.



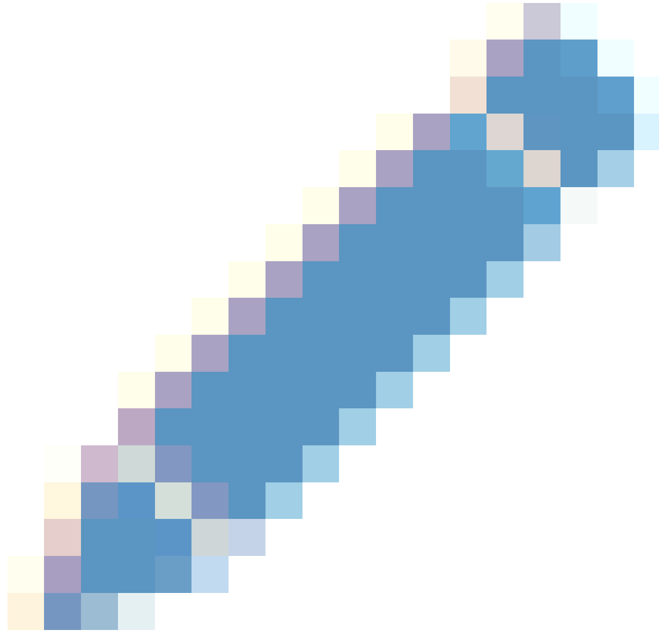
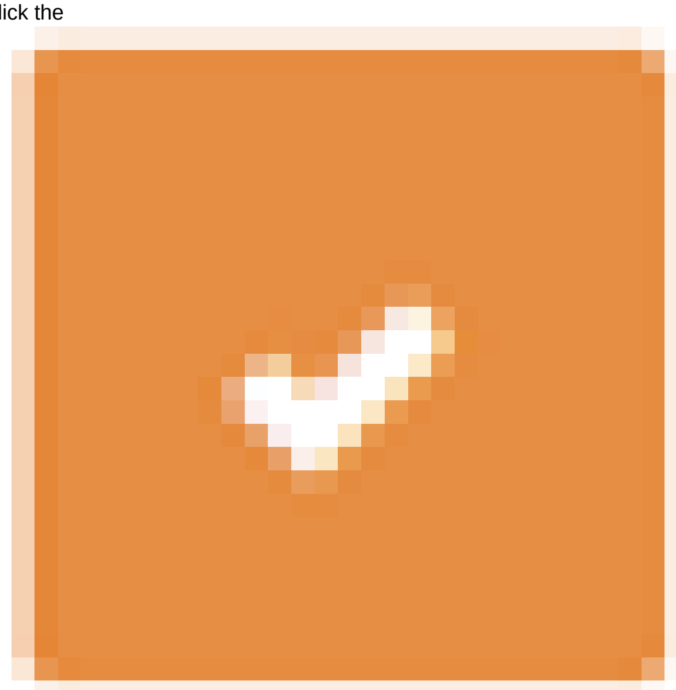
3. Scroll to the Billing Entities widget and click on the name of the billing entity you want to manage.

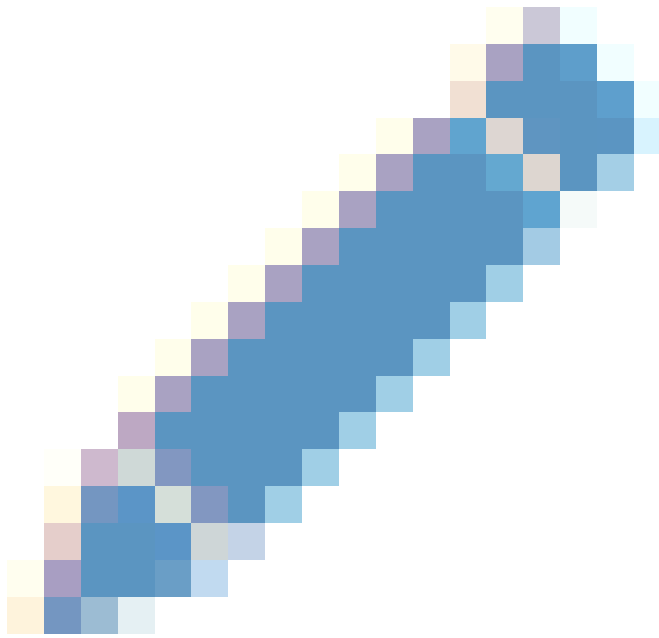
   The Manage Billing Entity dialog is displayed.

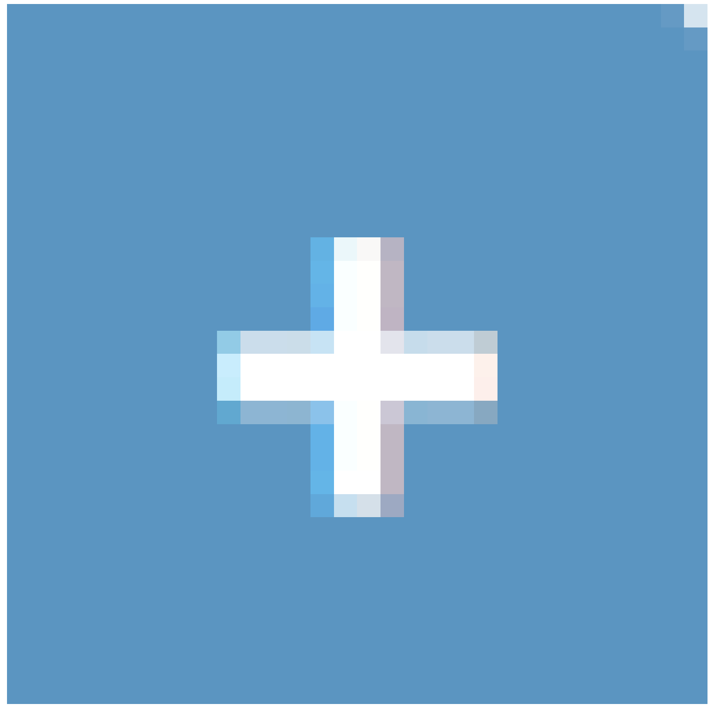
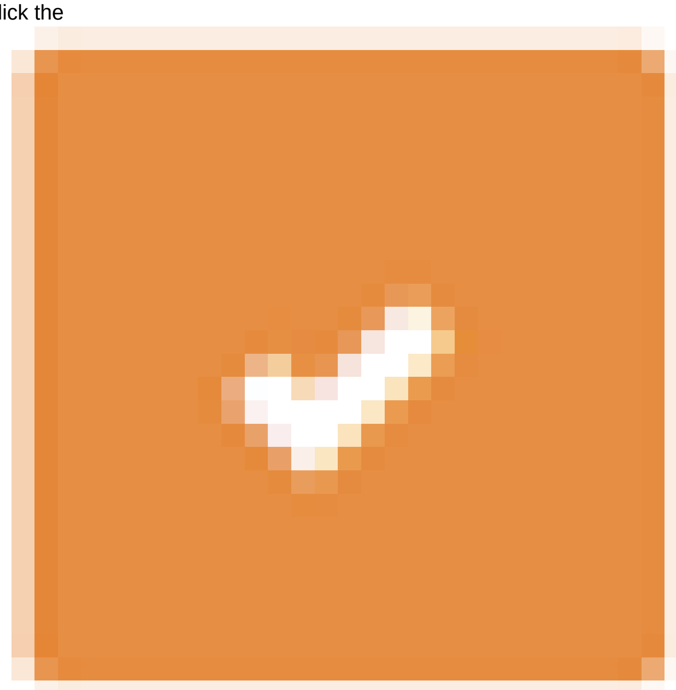


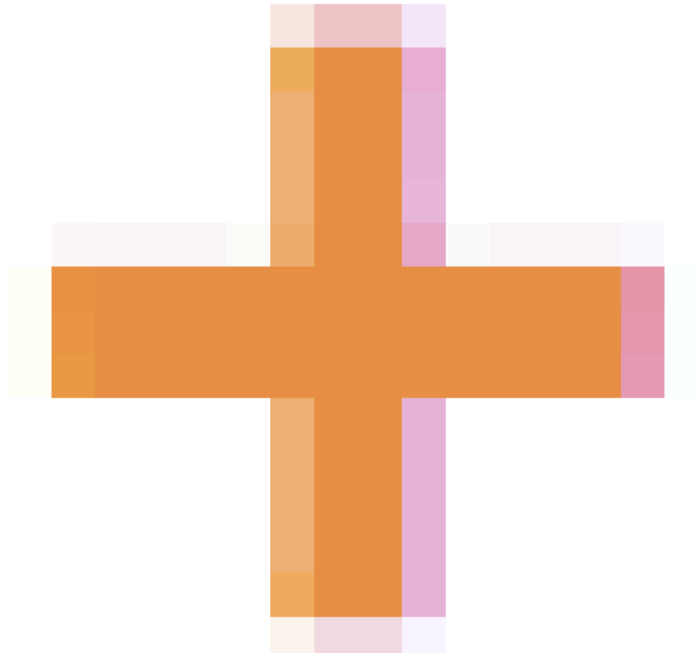
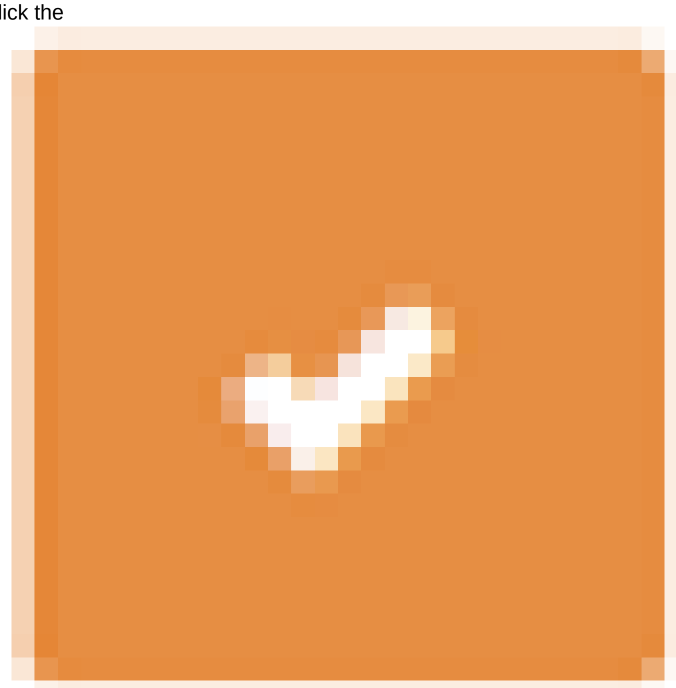
   From here you can do any of the following:

To	Do this

Change the parent of the billing entity For more information about parent billing entities, see Account Structure .	a. Click on the **Configuration** sub-tab. b. Click the  button in the Configuration area. c. Select the required billing entity using the **Parent** drop down menu. d. Click the  button.
Reload the configuration of the billing entity	a. Click the button in the title bar. b. Select the **Reload Config** option from the menu. The billing entity's configuration has been successfully reloaded only when the green success notification is displayed above the title bar.

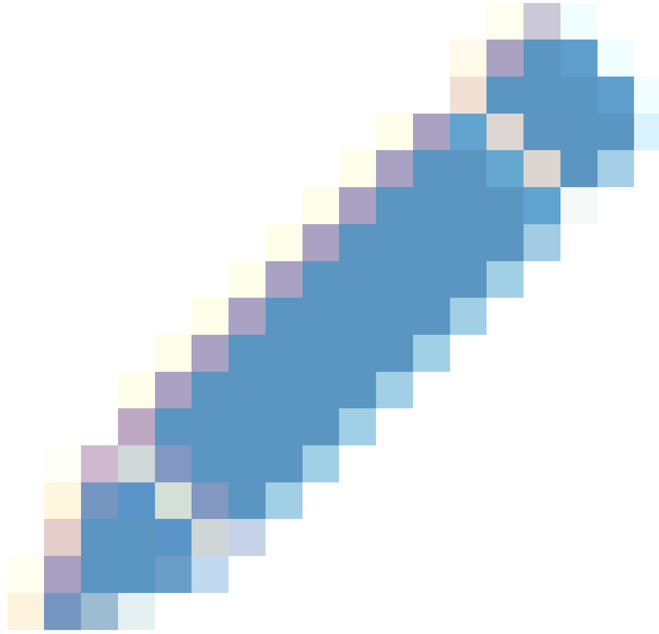
Create another billing entity with the same initial configuration as the current billing entity If you use this option, be certain that the control panel URLs of the billing entities are different, as using the same control panel URL for more than one billing entity may cause problems.	a. Click the button in the title bar. b. Select the **Create Similar** option from the menu.
Delete the billing entity	a. Click the button in the title bar. b. Select the **Delete** option from the menu. c. Click the button.
Edit the name, control panel URL, address, currency settings, tax number, or state of the billing entity	a. Click on the **Configuration** sub-tab. b. Click the  button in the Configuration area. c. Enter the required value in the appropriate text box or select it from the appropriate drop down. d. Click the button.

Assign Tags to the billing entity	a. Click on the **Availability** sub-tab. b. In the Include text box, enter a tag you want to assign to the billing entity. c. Click the  button. d. Repeat steps b and c until the required tags have been added. e. Click the  button.

Create or manage admin customers for the billing entity	a. Click on the **Admin Customers** sub-tab. b. Do one of the following: • To create an admin customer, click the  button. For information about how to add a customer, see Creating Customers. • To manage an existing admin customer, click on the name of the required customer. For information about how to manage a customer, see Managing Customers. c. Click the  button.
Change the customer used as a template when creating other customers for the billing entity	a. Click on the **Default Customer** sub-tab.

You can use this feature to change the template customer to an existing customer. It is not possible to use this feature to create a new template customer.

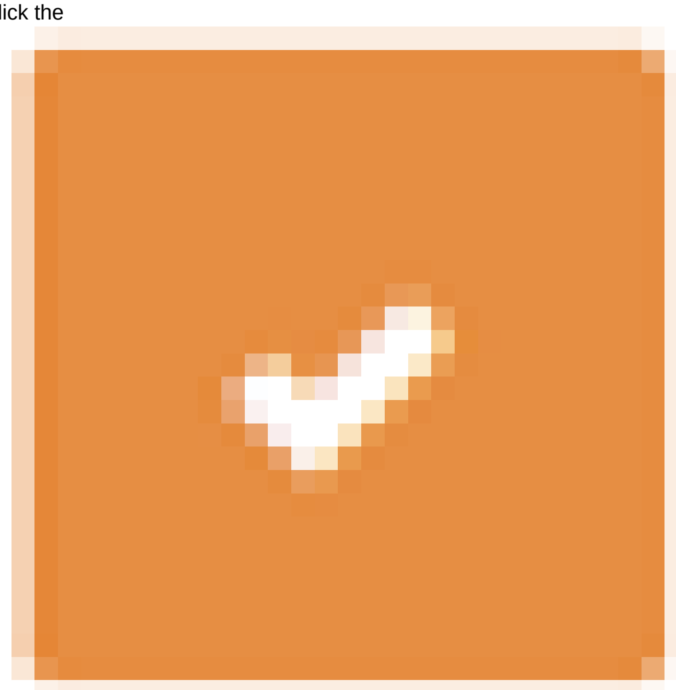
b. Click the



button in the Default Customer area.

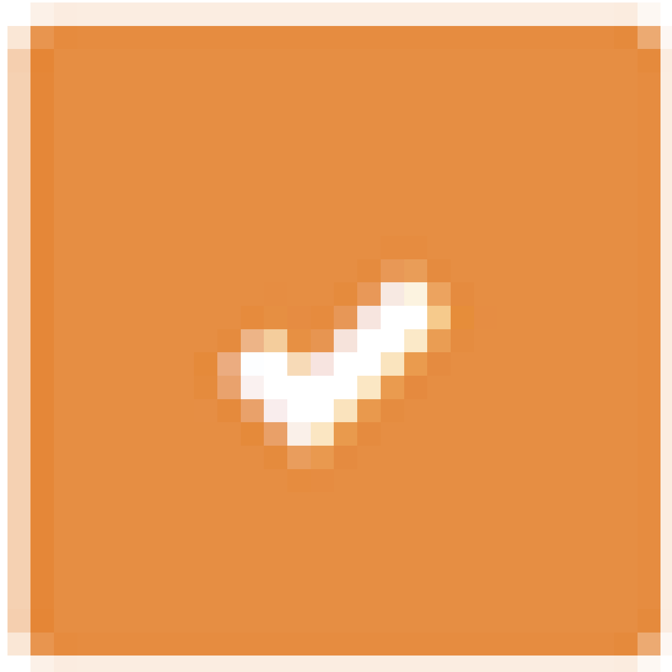
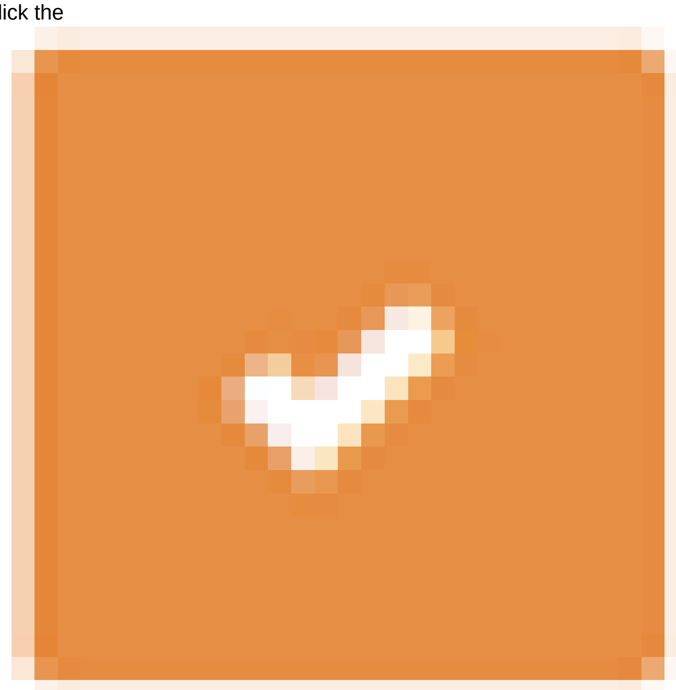
c. Enter the name of the new default customer.

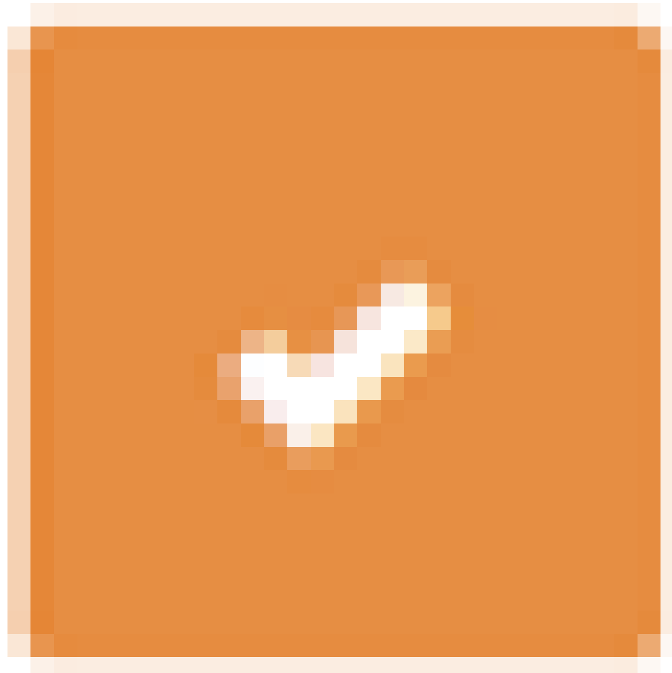
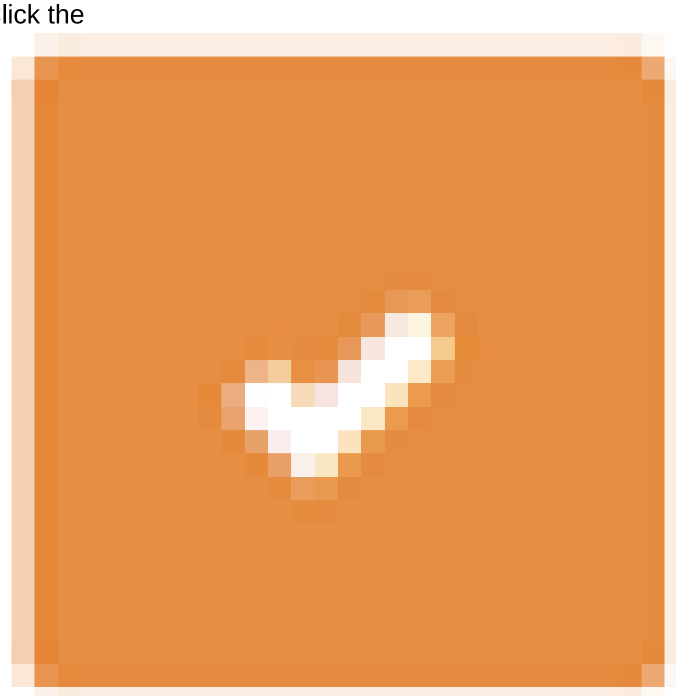
d. Click the

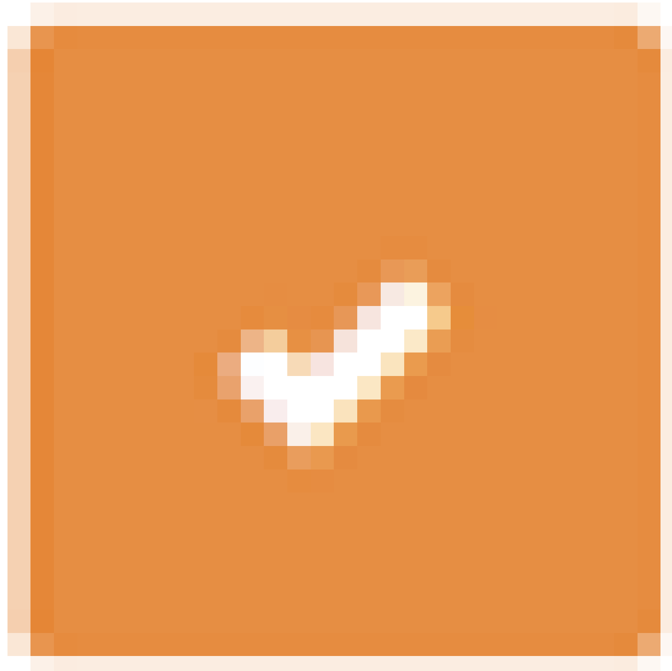


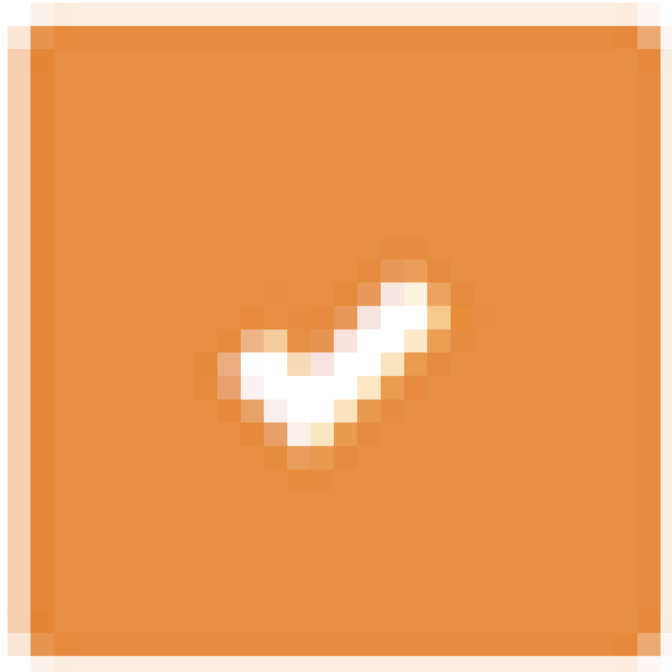
button to search for the default customer.

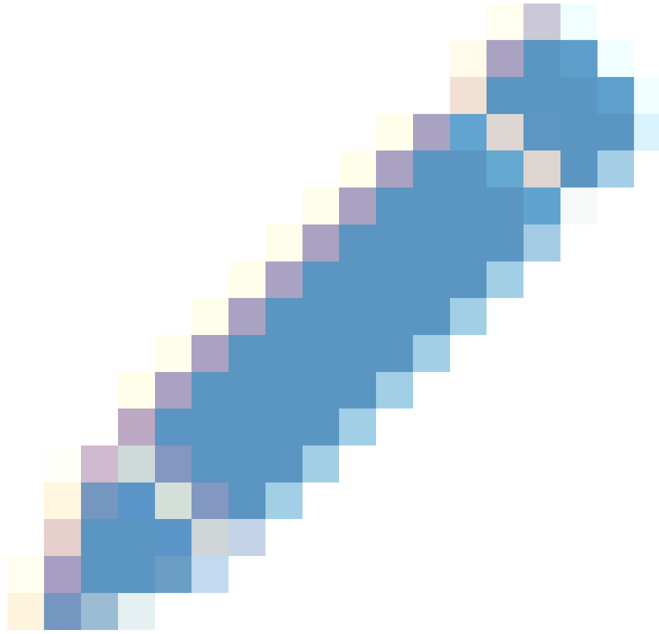
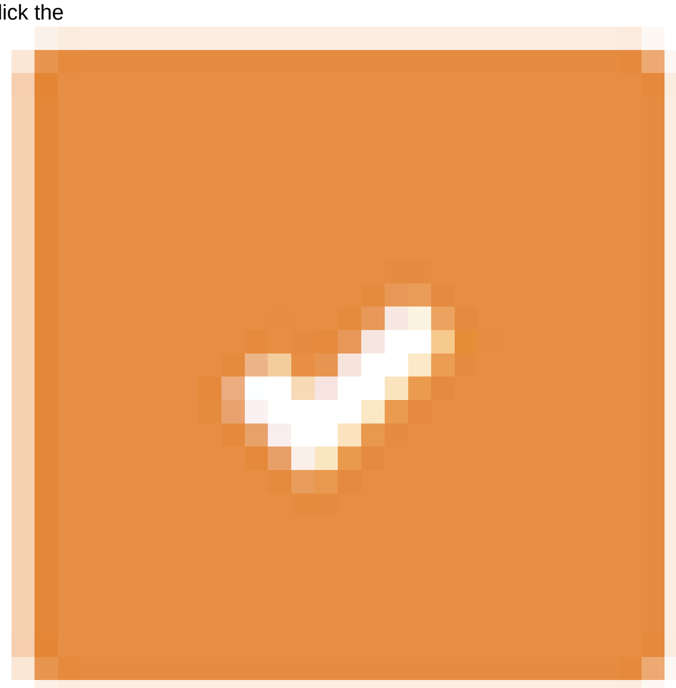
If your search returns results, these are displayed in the Search Results area below the search field.

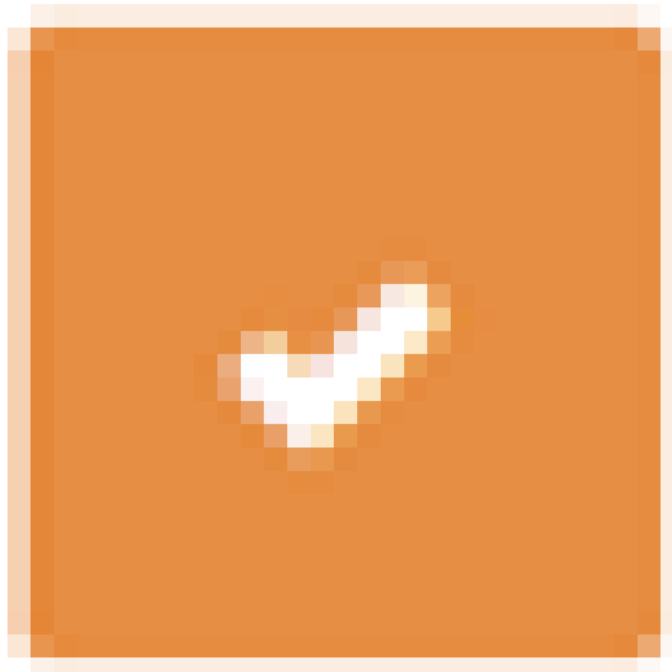
	e. In the Search results area, click the  button next to the customer you want to use as a template for new customers.
Change the resource types that the billing entity can use to create product offers	a. Click on the **Permitted Product Offer Resource Types** sub-tab. b. Select or deselect the check boxes as required. If a check box is selected, the billing entity can create product offers using the corresponding resource types. For an explanation of these terms, see Products, Product Offers, and Billing. c. Click the  button.

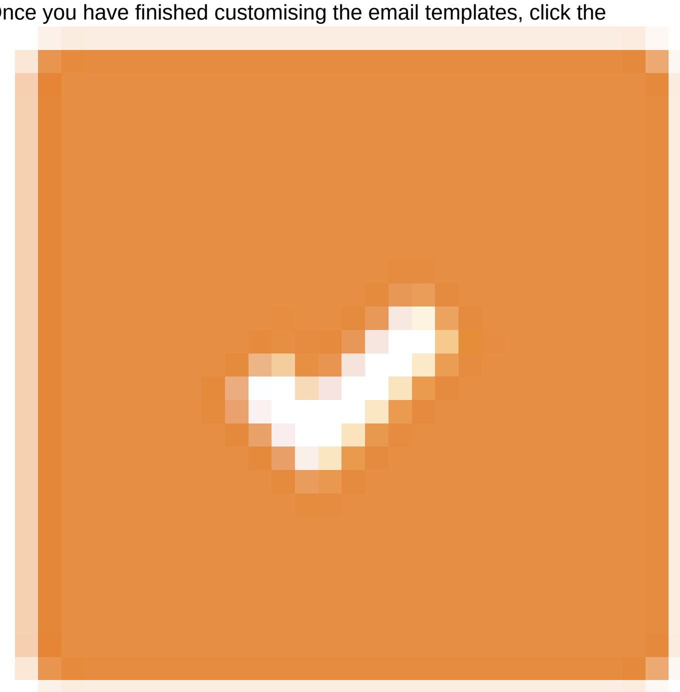
Configure the control panel options for the billing entity	a. Click on the **Control Panel Options** sub-tab. b. Specify the required settings using the text boxes and drop downs. For information about what the control panel options settings are used for, see Control panel options. c. Click the  button.
Set branding options for the billing entity's platform	a. Click on the **Themes** sub-tab. The current theme for the billing entity is shown in the Active Theme field. b. To change the theme used by the billing entity, select the required theme from the Available Themes drop down. c. Click the  button.

Set the capabilities of the billing entity	a. Click on the **Capabilities** sub-tab. b. Select or deselect the check boxes as required. If a check box is selected, the capability is active. c. Click the  button.
Manage the languages that can be used by child billing entities, customers, or users of the billing entity	For information on how to do this, see Language Management.
Manage individual translations in a translation that you own	For information on how to do this, see Modifying translations.

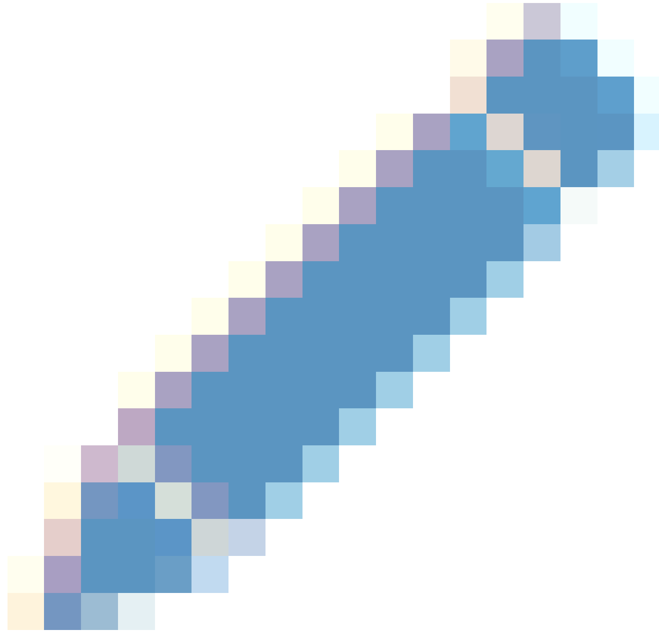
Change the default language used by the billing entity Changing this setting will only affect the display language of child billing entities, customers, and users who have not modified their language settings. For more information, see Order of precedence for language settings.	a. Click on the **Language** sub-tab. b. Select the appropriate language using the **Default** drop down menu. c. Click the  button.

Specify the payment methods that can be used by customers of the billing entity	a. Click on the **Payment Processing** sub-tab. b. Click on the name of the payment method you want to enable or disable. c. Click on the **Configuration** sub-tab. d. Click the  button in the Configuration area. e. Do one of the following: i. To enable a hidden payment method, select **Active** from the **State** drop down. ii. To hide an enabled payment method, select **Hidden** from the **State** drop down. f. Click the  button.

Customise the invoices that are sent to customers of the billing entity	a. Click on the **Invoices** sub-tab. b. Do one or more of the following: i. Customise the content of the invoices as required using the fields in the Invoice Settings and Invoice Header subsections. ii. If required, change the layout of the invoice by entering the required CSS changes in the Invoice Template CSS subsection. iii. Upload headed stationery for your PDF invoices using the Upload PDF Template subsection. This should be a PDF of a blank headed page. c. Click the  button.

Customise the emails that are sent to customers of the billing entity, and choose the email templates to send By default, emails sent to customers appear to come from `noreply@example.com`, which some email providers will automatically filter out as spam. So that emails reach your customers, you should modify the From Address and Reply To fields in the Email Settings section to an email address on your company's domain.	a. Click on the **Email Settings** sub-tab. b. Define email header and footer content in the Email Settings section. c. Click on the name of the email template you want to customise. Templates are provided for the following emails: • Account cancellation. • Invoice notification. • Low balance warning. • Zero balance warning. • Auto-top up failure. • Reset password request. • Reset password confirmation. • Signup activation e-mail. • Signup manual approval e-mail. • Standard e-mail footer. • Standard e-mail headers. d. Customise the content of the email template as required. For a list of variables which can be used in these email templates, see REST EmailVAR. e. Select or deselect the **Enable sending of this email** check box as required. f. Once you have finished customising the email templates, click the  button.
Manage the Chef settings for servers created in the billing entity For information about how these settings are used to communicate with Chef, see Chef integration. For an explanation of the order of precedence for Chef settings, see Chef settings hierarchy.	a. Click on the **Chef Settings** sub-tab.

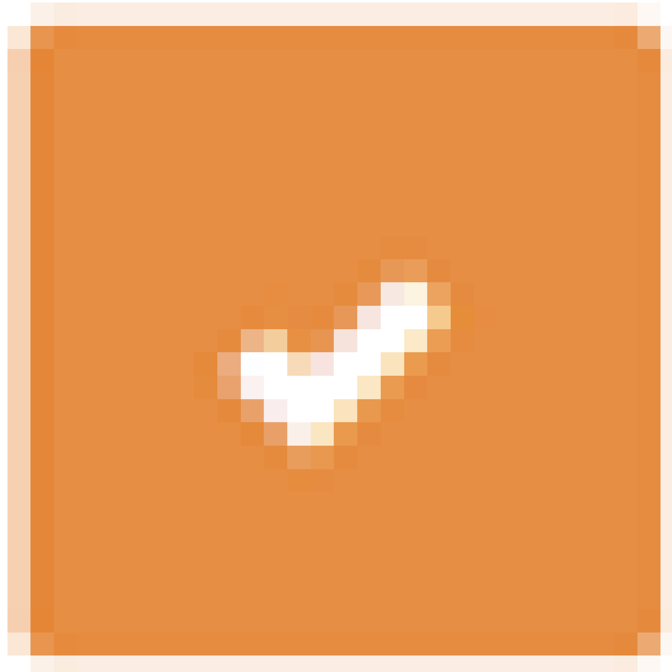
b. Click the



button in the Chef Settings area.

c. Complete the following fields using information from your Chef account:

- Chef Repository URL
- Chef Repository PGP Key
- Chef Server URL
- Environment
- Validation Name
- Validation Key
- Recipes
- Roles

	d. Click the  button. When a server created in the billing entity first boots, a trigger compiles this information and sends it to the Chef server specified using the Chef Server URL field. This information is passed to the Chef server on first boot only. Subsequent reboots will not affect the information held by the Chef server and hence the configuration applied to the server will not reflect changes to these values after the server is first booted.
View and edit the billing entity's metadata	a. Click on the **Bootstrap** sub-tab. b. Click the icon below the metadata sections. c. Edit the metadata as required. d. Click the button.
View jobs associated with the billing entity	Click on the **Information** sub-tab.
View and manage the related resources and UUIDs for the billing entity	a. Click on the **Information** sub-tab. b. In the Related Resources and UUIDs section, click the name of a related resource or UUID to manage it. Not all related resources and UUIDs can be managed; those which can be managed are indicated by their name or UUID appearing as a link.
View any keys associated with the billing entity and add more if required	a. Click on the **Keys** sub-tab. b. To add a key, enter the required details and click the button. For more information about keys, see Keys.

4. Once you have finished managing the billing entity, close the Manage Billing Entity dialog by clicking the


button.