Partner Business Center (PBC) User Guide

Last Updated: May 2020

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Overview

The McAfee® Partner Business Center (PBC) is a web-based application that has been established to help Service Provider Specialization partners manage their SaaS product deployments in an easy-to-use environment. Using the Partner Business Center, you can manage your customers, add and update their subscriptions and review the status of your orders by generating reports. Additionally, you can manage access to the site, update your profile or reset your password using the partner tools and my profile pages. When partners establish access to the PBC, they will be issued a unique, secure log-in.

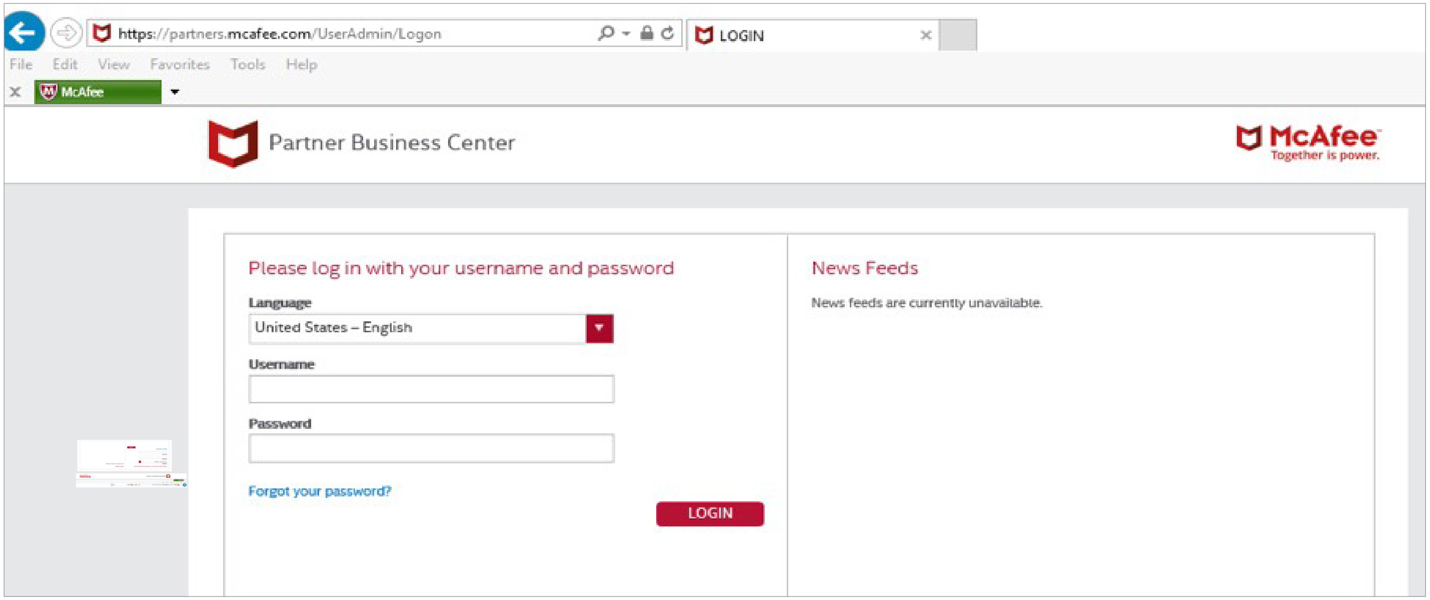
In addition to this PBC User guide, additional resources are posted to the Partner Portal: https://partnerprogram.mcafee.com/msp

API Partners: Service Provider Specialization partners using our SaaS Ordering APIs (including connectors such as Odin APS or AppDirect), your PBC Customer Management functionality will be read-only. This is because all creation and edits of customers and deployments should occur through your API integration, not the PBC user interface. Please continue to use the PBC for the following functions:

- SO into your customers' ePO Cloud accounts to provide support
- Add/ update your logo and other branding options
- Add PBC users at your company such as your Technical Support team
- Generate reports

Accessing the Partner Business Center

When you access the Partner Business Center site https://partners.mcafee.com/UserAdmin/Logon, you will be taken to the Log in Page. Enter the log-in credentials that you were emailed as part of your PBC activation confirmation.

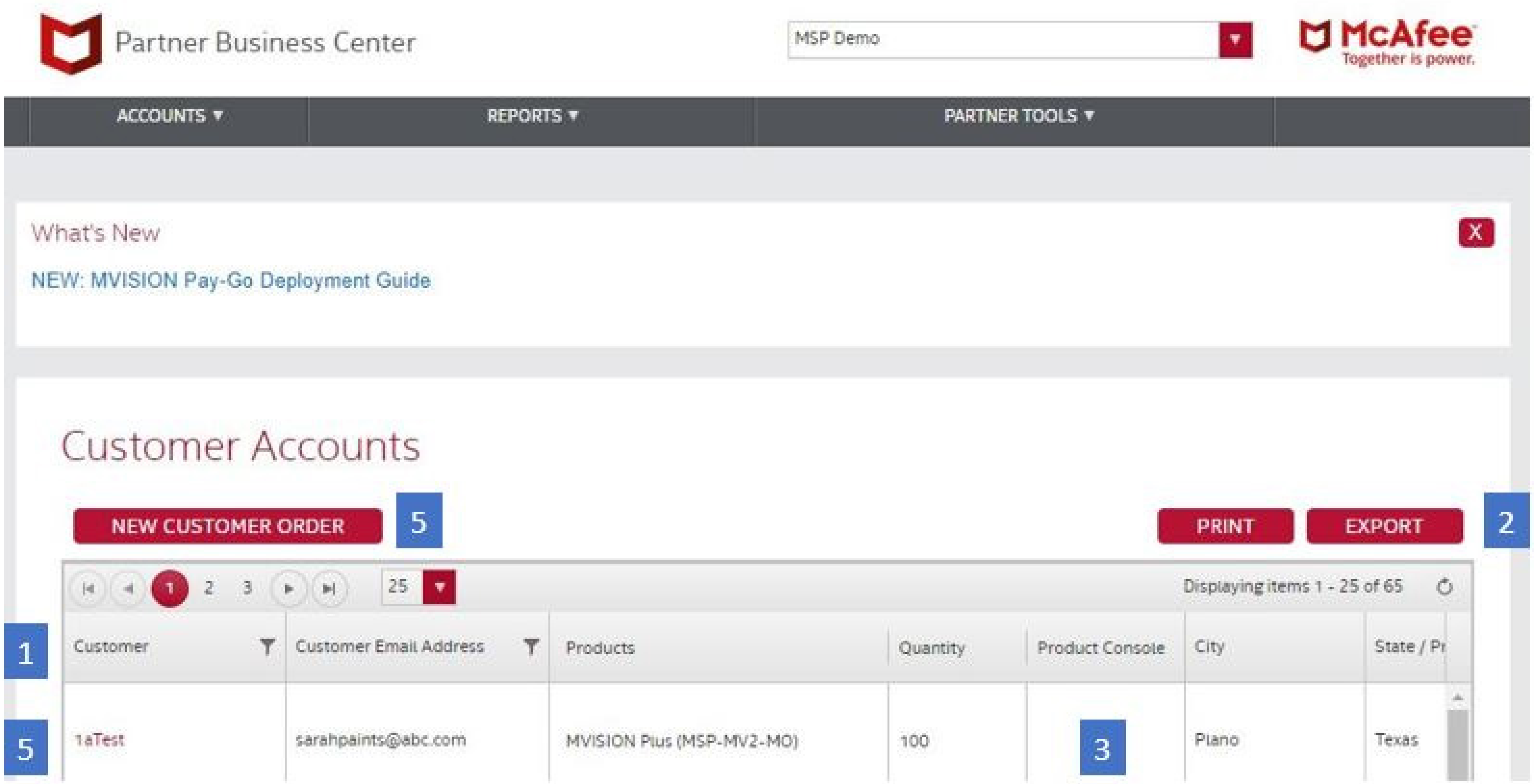


After your account has been authenticated, you will be taken to your Customer Account page that lists all of the end customer deployments associated with your account.

With the proper roles assigned (i.e. Customer Management role of read-only or full access), the Customer Accounts list page displays all of your current active subscriptions. Without these roles, you will not see any of this detail on the page.

Assuming adequate PBC roles assignment, you are able to take the following action on the Customer Accounts page:

1. Search for a given customer on the list via the filter control on the 'Customer' column
2. Export the entire customer list in .xls file format
3. Single sign-on into one of the available security management consoles to manage the end customer's security. To complete this function, click on the hyperlinks displayed under the 'Product Console' column
4. Manage a customer's detail by clicking on the hyperlinked customer name
5. Create a new customer order



Managing Partner Profile

When you log in to the PBC, you can navigate to your partner profile to configure your account settings.

Under Partner Tools in the navigation, select Partner Profile and then choose the Configuration tab and click "Edit"

Configuration Information: Select partner preferences for language, security management, email notifications and branding.

Please note that partner accounts are set up to US English by default. This means that the date fields follow the US format of MM/DD/YYYY. You may change your language/location in the configuration tab as appropriate for your organization.

Email Notification Type - specify what notification email(s) you or your customer would like to receive (None/Never, Order Notification or Order and Activation Notification)

McAfee to Send Email - SP customers have Managed Security, therefore the notification(s) should be sent to the Partner. The partner may then choose to forward this email to the corresponding end user.

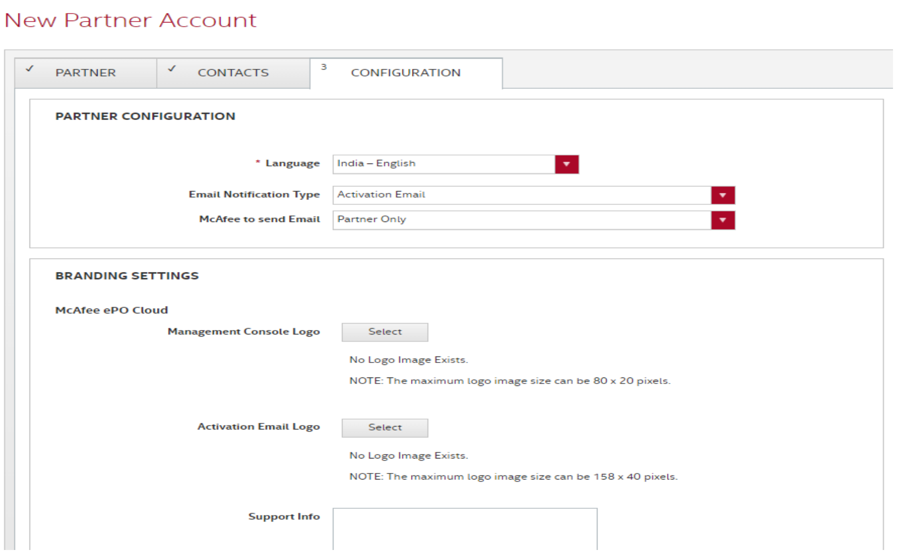
Branding Settings: Optionally specifies the logo, support info and email address used to support branding in McAfee ePO Cloud. No branding options currently available for MVision ePO products.

- **Logo-** Specifies a logo image. The image must be 80 x 20 pixels for the product console logo and 158 x 40 pixels for the logo in email
- **Support Info-** Specifies support information. Limited to 1000 characters
- **From Email-** Specifies the email address partners use to brand email messages
- **Buy URL-** Specifies the URL partners use to brand the "buy" link

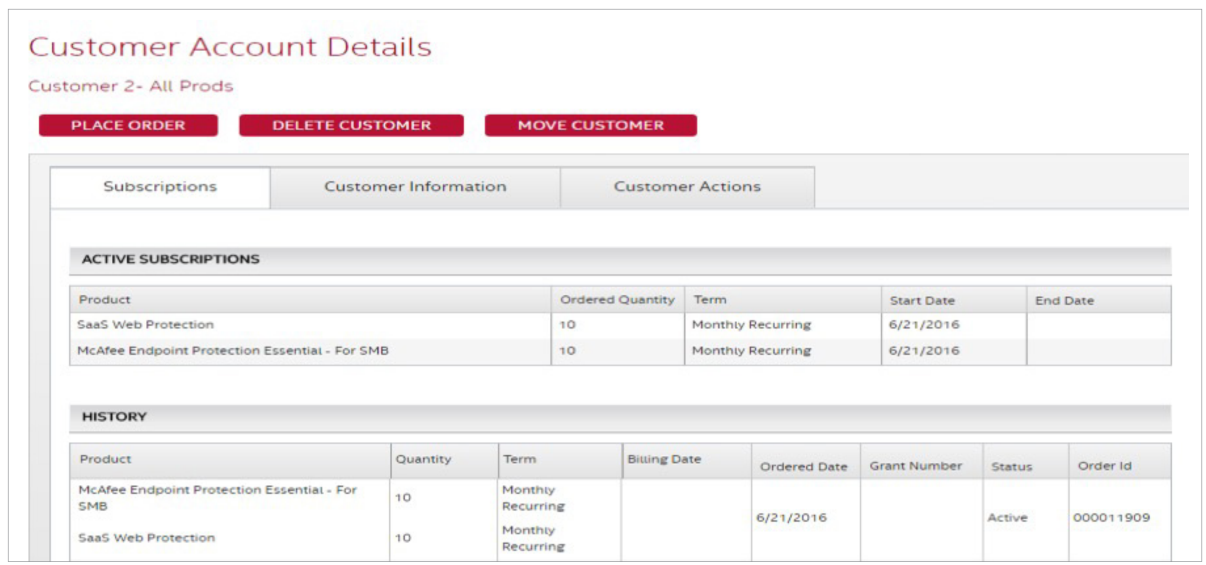
Managing Existing Customers

When you log in to the PBC, your view will default to the Customer Accounts Summary page (see chart above). This page provides a high-level view of each existing customer, their location (city, state, country), the products you are deploying to them and the product console for which their products were provisioned (e.g. Security Console, Cloud ePO etc.).

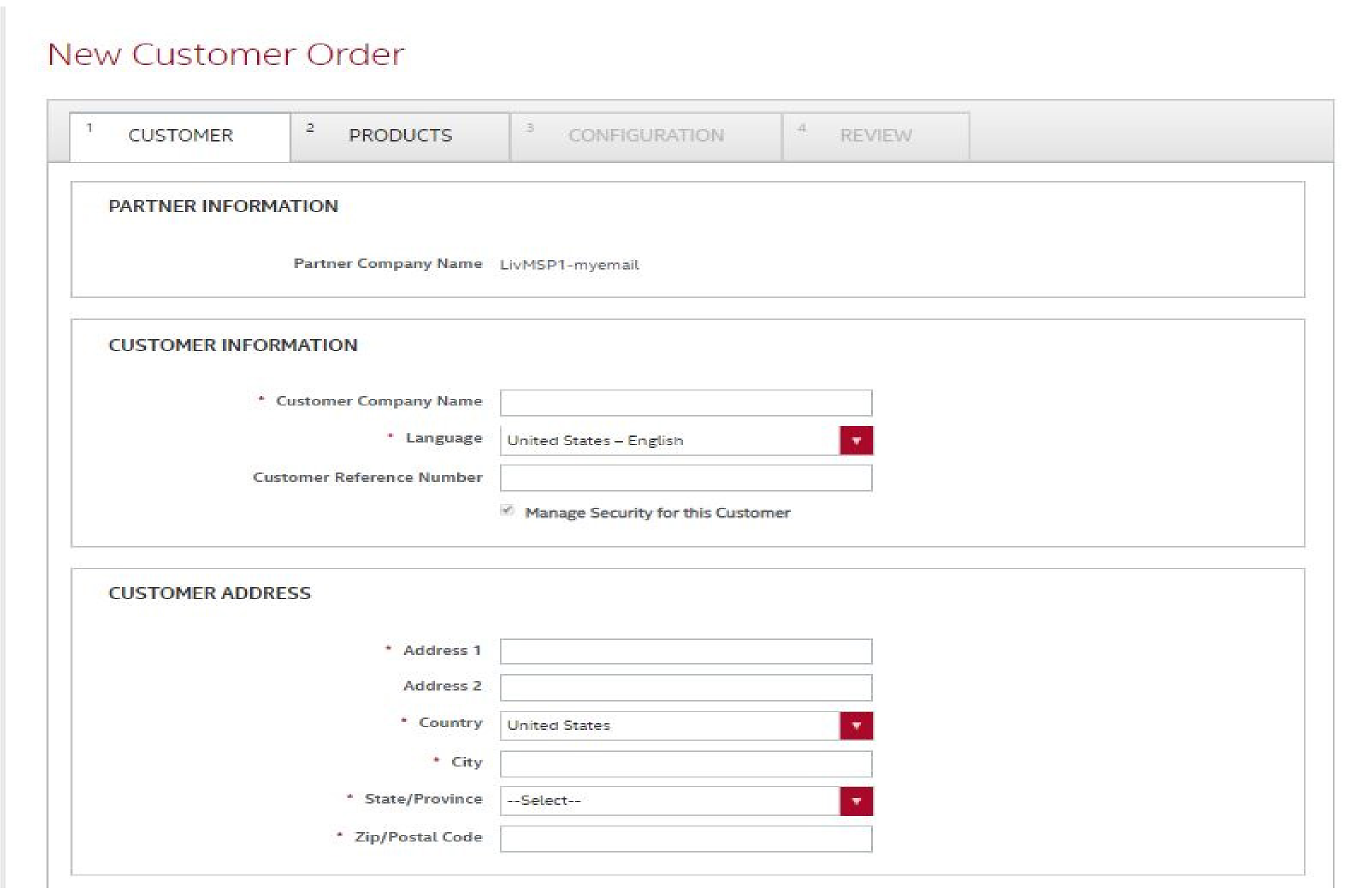
You can manage the existing customers through the "Customer Account" page located under the Accounts tab in the main navigation in the PBC. To access a specific customer record, click on the hyperlink in the customer name (see box "4" in image above). You will be taken to the Customer Account details page that hosts a specific customer's details including information about the customer's active deployed products and history, customer information which is editable, as well as customer actions.



The “Subscriptions’ tab allows you to view all subscriptions belonging to the customer including a breakdown of active deployed products and history.



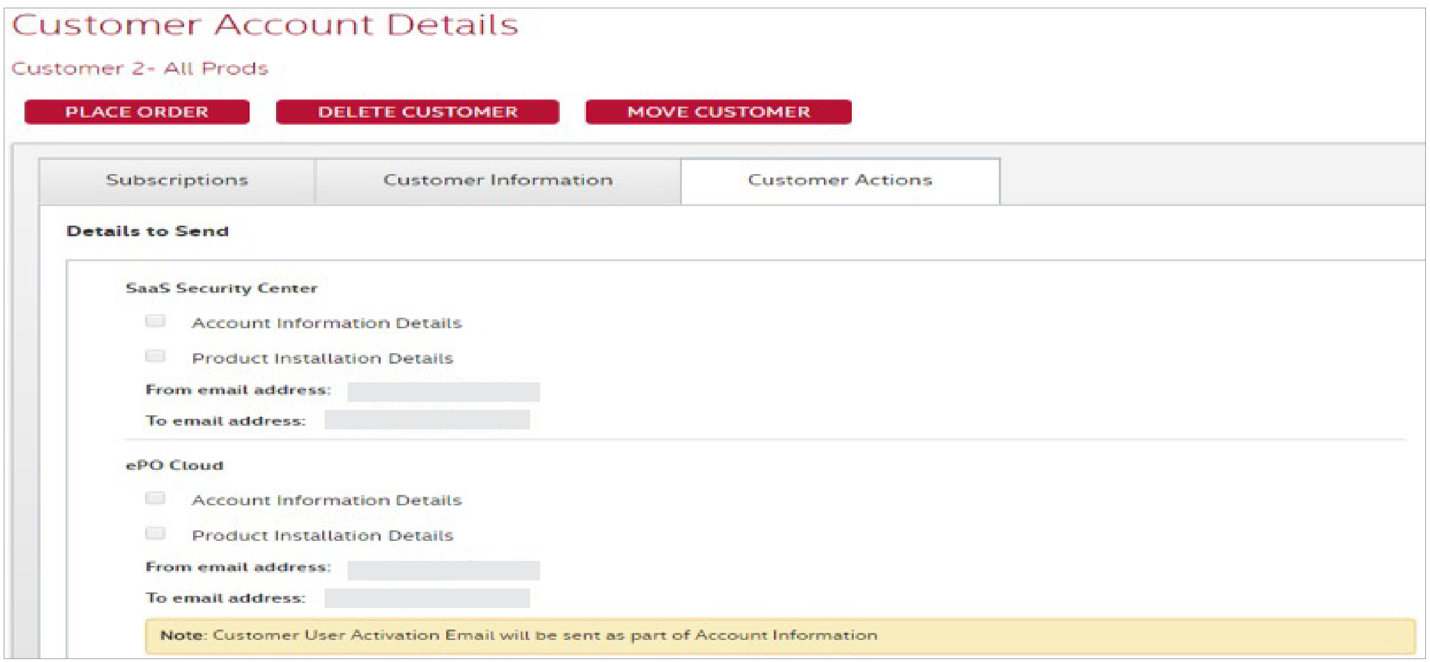
The ‘Customer Information’ tab allows you to access the data specific to that end customer including company name, address and other pertinent information. You may use the ‘customer reference number’ field to enter in your own unique customer identifiers to cross-reference customers in your systems (e.g. 1098472 or customer ID #).



Under the "Customer Actions' tab, you can choose to resend account and/or product installation details to the corresponding contact associated to the customer's account.

1. **Account Information Details:** Email will be sent to Primary contact email address. Email will contain similar information reflected in a new customer welcome email that is generated from the New Customer Order process (i.e. customer name, contact, products ordered, etc.).
2. **Production Installation Details:** Email will be sent to Primary contact email address. Email will contain information instructing how to access ePO Cloud and activate/install/configure customer's security services.

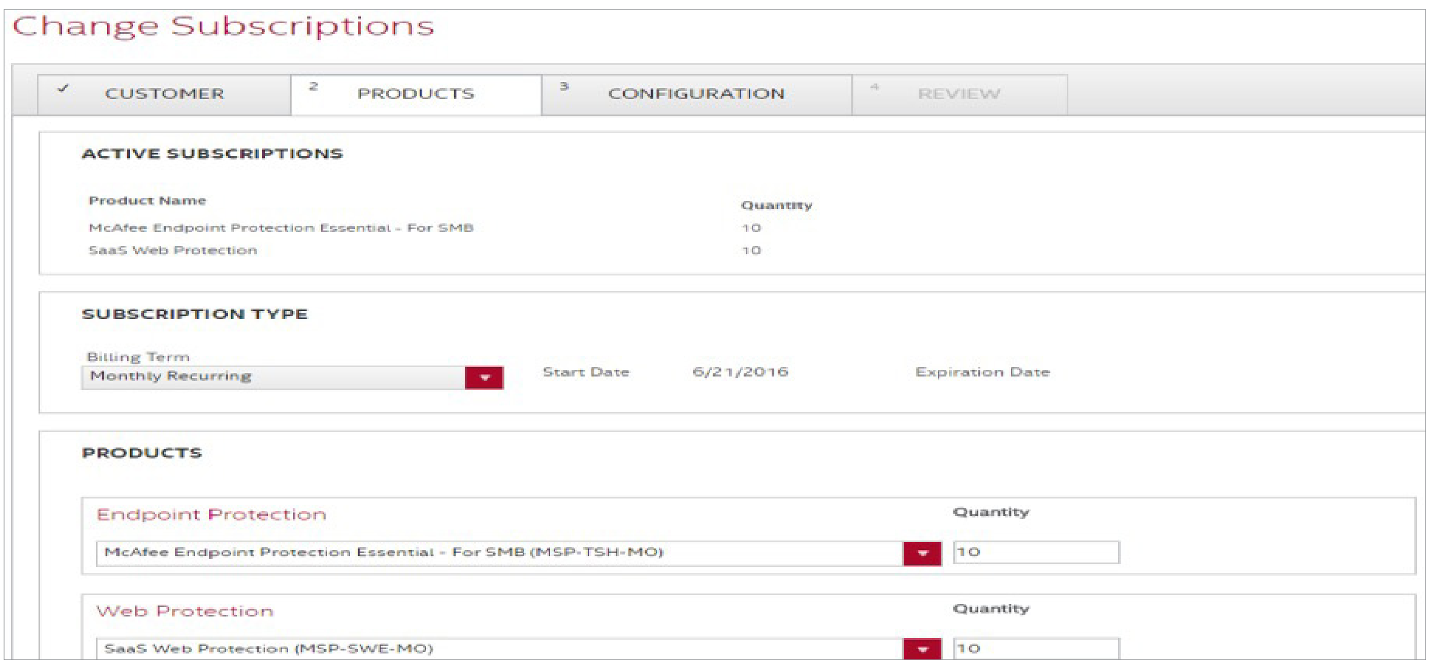
In addition to using the "Customer" tab for place new orders, you are also provided with an option to delete a customer record.



Within the Customer Account Details page, by selecting the 'Place New Order' button, you will be redirected to the Change Subscription page whereby the user can change the customer's existing and active subscriptions.

For certain term types (e.g. recurring), the Change Subscription page will prepopulate all active subscriptions. You can both add products to the current active product deployment by choosing other products listed in other drop-downs, or deselect the existing product, and choose an entirely different product for deployment.

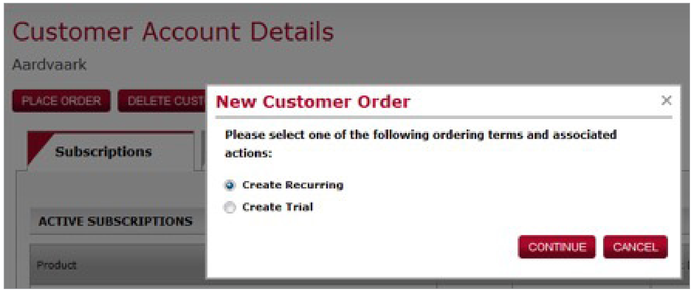
Once you have finished entering the appropriate product information on the 'Products' tab, user will continue to navigate through other tabs similar to New Customer Order process flow. You will review and submit 'Change Subscription' to process the order.



Managing Subscriptions

As a partner, you can create and modify your product deployments for your customers.

Trial subscriptions
A trial subscription allows you to try a new product for a limited time before deciding to deploy as a monthly recurring subscription. To access this option, click on 'New Customer Order', then "Create Trial".



Create a new customer order
Use this task to add new customers, create new subscriptions and configure options.

Change existing subscriptions
Use this task to make changes to an existing customer's subscriptions – including updating the license count or cancel the existing subscription.

ePO Cloud
In order to configure service options for a new McAfee Endpoint order or a new Web Gateway Cloud Edition (SWE), you need to access the ePO Cloud site. Once you are logged on, you can install McAfee SaaS Endpoint Protection for SMB (TSH) and McAfee Web Gateway Cloud Service (SWE) can also be configured in ePO Cloud.

MVision ePO

In order to single sign on into your Customer's MVision account as a Partner from PBC, Partner must send an email to MSPPartnerCare@mcafee.com to request their one-time credentials for MVision ePO. See separate Service Provider MVision provisioning guide on the Partner Portal for details.

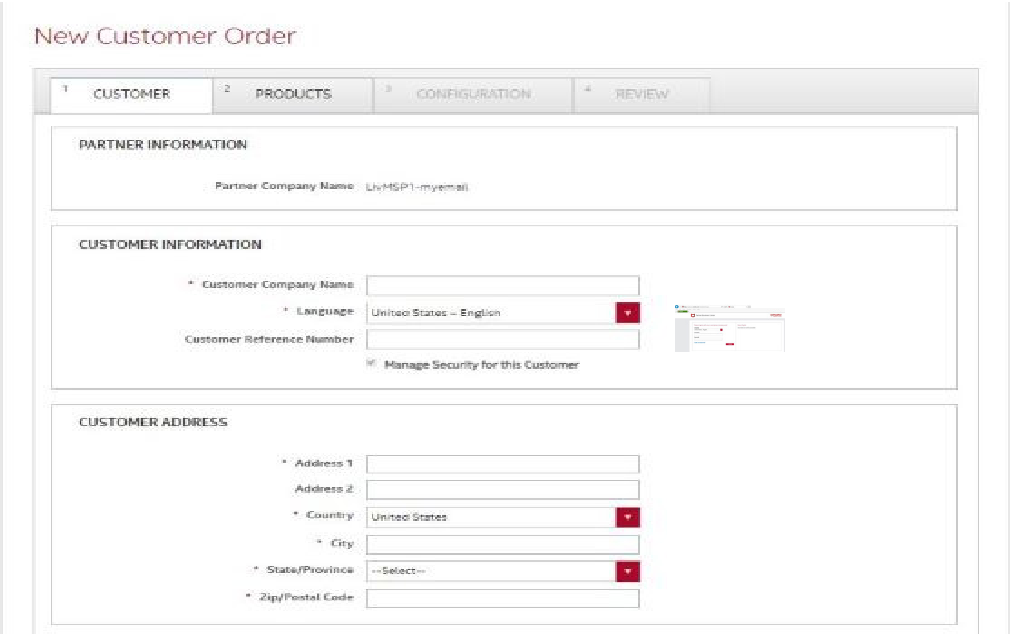
Creating a New Customer Product Deployment

By Clicking on the 'New Customer Order' button on the Customer Accounts page, you can begin to place a new customer product deployment. Ensure that you choose this course of action for any customer that currently is not listed in the partner's Customer Account list.

For any customer that is already listed in your Customer Account list, you should manage orders via the 'Existing Customers Details' page functionality (see Customer Accounts Details page).

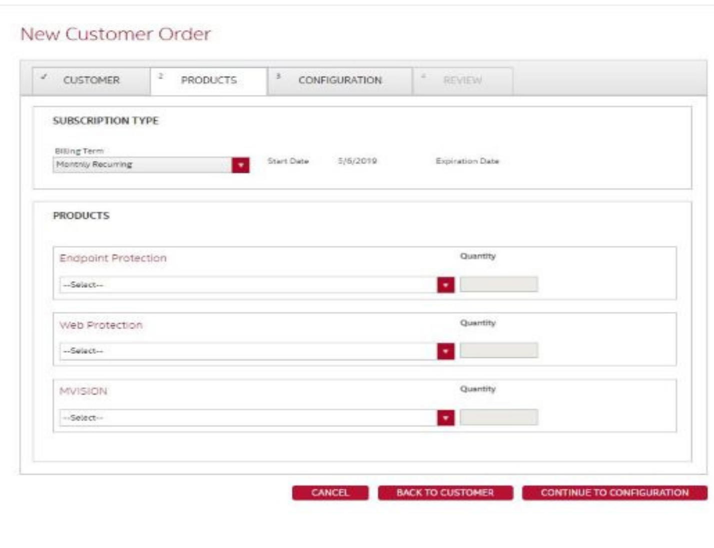
After clicking on the 'New Customer Order' button, you should complete all required information contained within the New Customer Order form:

Customer Information: Collects general data describing the customer company name as well as customer contact information



Use 'Customer Reference Number' to enter your own unique customer identifiers to cross-reference customers in your systems (e.g. 1098472 or customer ID #)

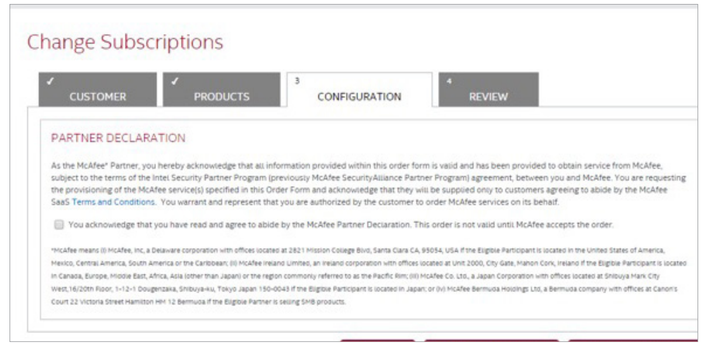
Products: Select the appropriate product in the drop-downs and enter quantity



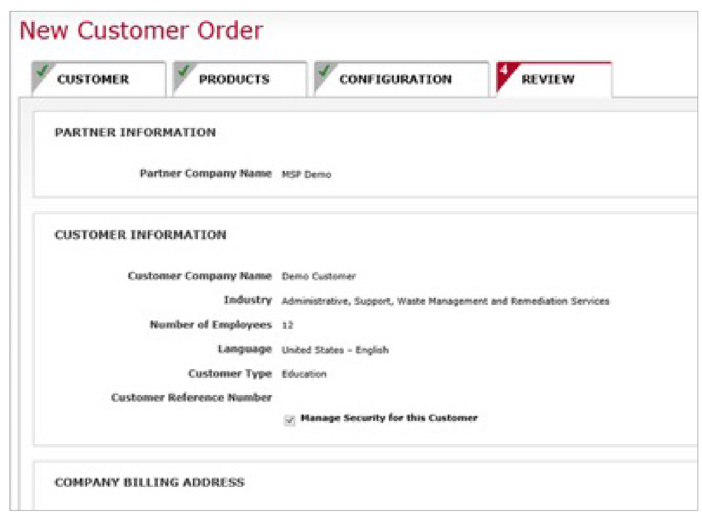
Once a user selects a given product, the PBC will dynamically present other product options that are eligible for deploying in combination with the initially selected product. Some products are mutually exclusive from other products and cannot be provisioned in concert together in the McAfee SaaS product systems together.

For Detailed Instructions on how to deploy MVISION ePO products, please refer to the [MVISION Pay-Go Deployment Guide](#).

Configuration Information: Enter a unique customer administrator email address for each new customer



Review: Review and confirm all New Customer Order information. Submit order to create new customer and have order processed. Read and accept the Partner Declaration.



For Internal and Channel Use Only

Creating a trial within the PBC

About trial subscriptions

Trial subscriptions are available for the SP partners. A trial subscription allows a customer to try a new product for a limited time before they decide to purchase a recurring subscription.

Managing trial subscriptions

A trial is limited to one product and a customer can have multiple subscriptions if they want to try multiple products. However, customers cannot have more than one trial subscription for the same product.

Replacing a trial with a new recurring subscription

An order for a new recurring subscription automatically replaces the current trial subscription even if there is still time remaining in the trial.

Trial expiration

The expiration date for a trial subscription depends on the product. In general, a trial subscription lasts for 30 days.

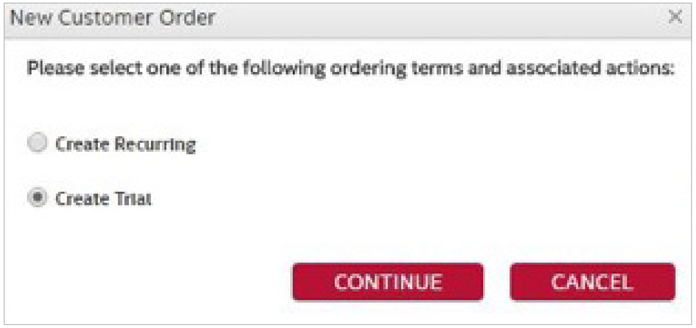
Extending a trial subscription

Expired trials can be extended for an extra 30 days using the link in the History section of the Customer Account Details page. The link is available for 60 days from the first day of the trial subscription.

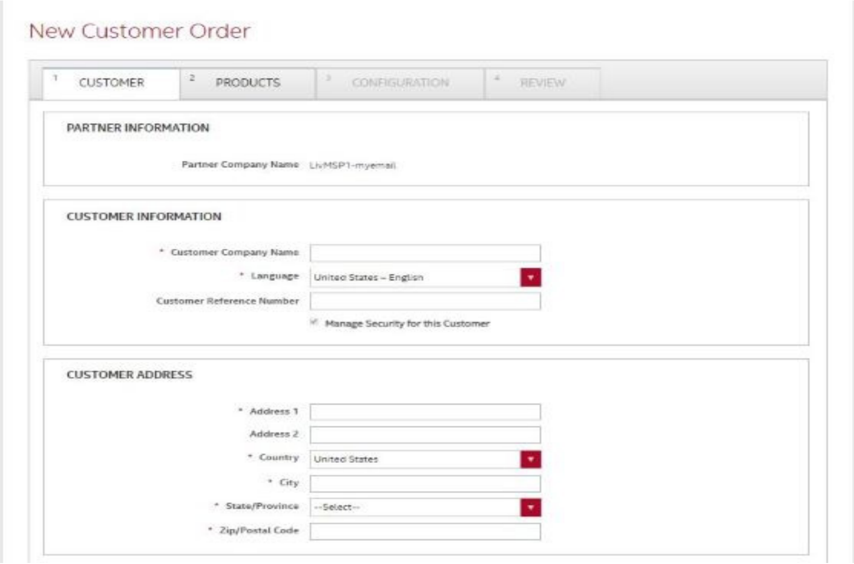
Creating a trial

Within the PBC, click on new customer order

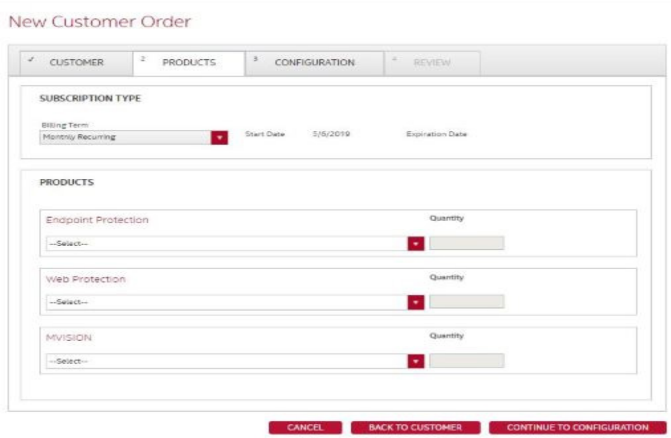
1. In the main PBC screen, click on "New Customer Order"
2. Select "Create Trial" and click continue



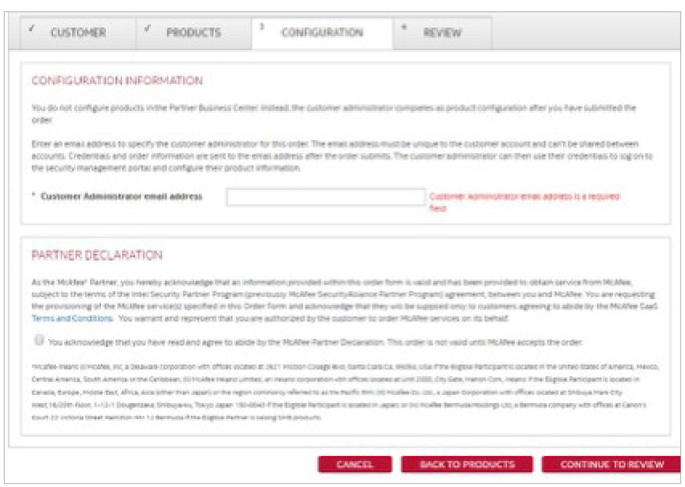
3. Fill in all the customer details and click continue



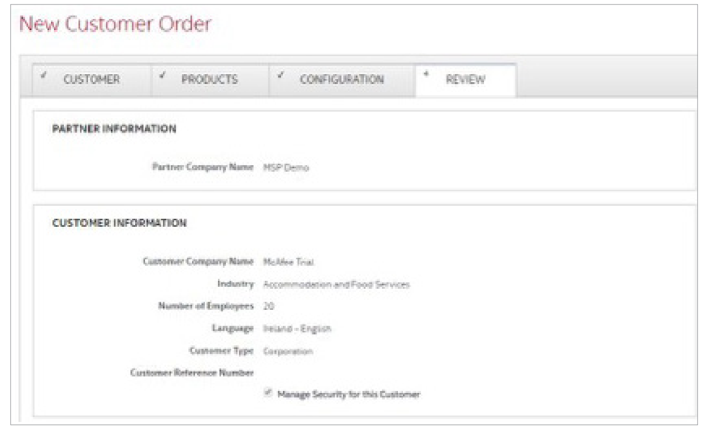
4. Select the product you wish your customer to trial. This can be either Endpoint Protection, Web Protection or one of the MVision Products.



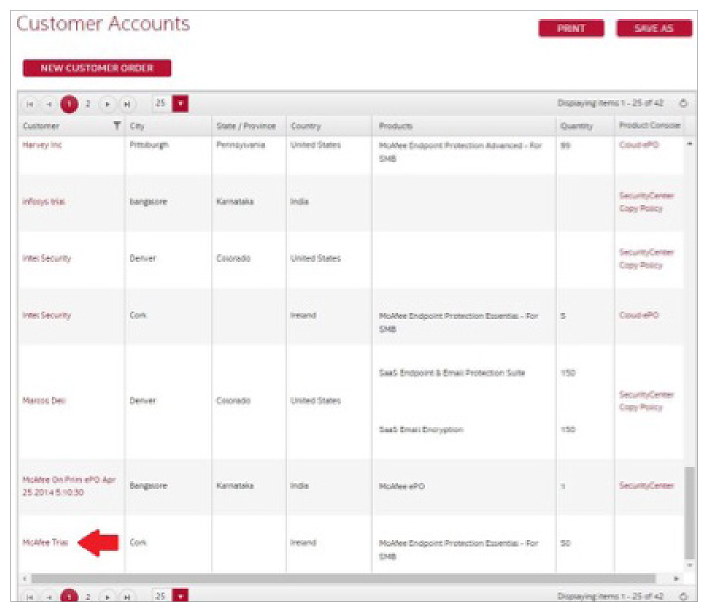
5. On the next screen fill in the customer administrator email address and acknowledge the partner declaration



6. Review the information and press submit if correct

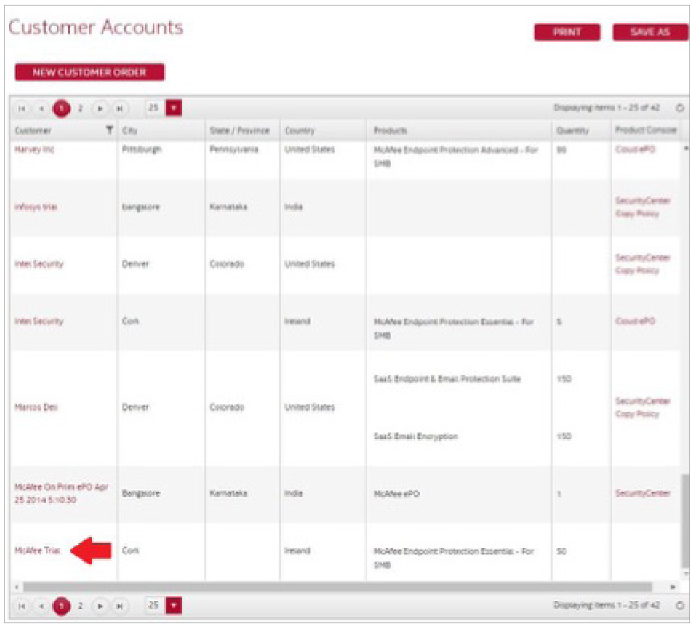


7. Your trial customer will now show up within the PBC overview

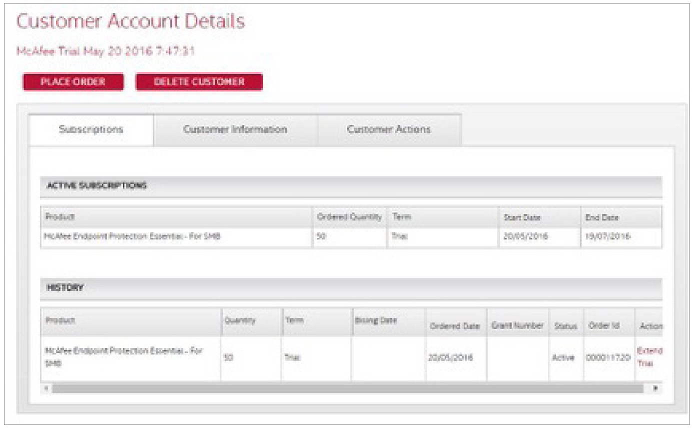


Converting a trial to a recurring order within PBC

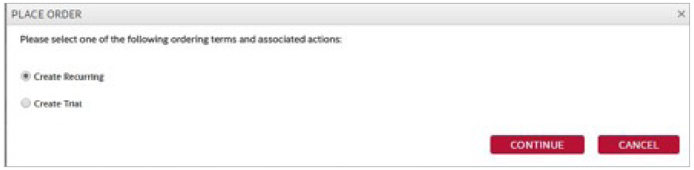
1. Within the PBC overview click on the trial customer's name



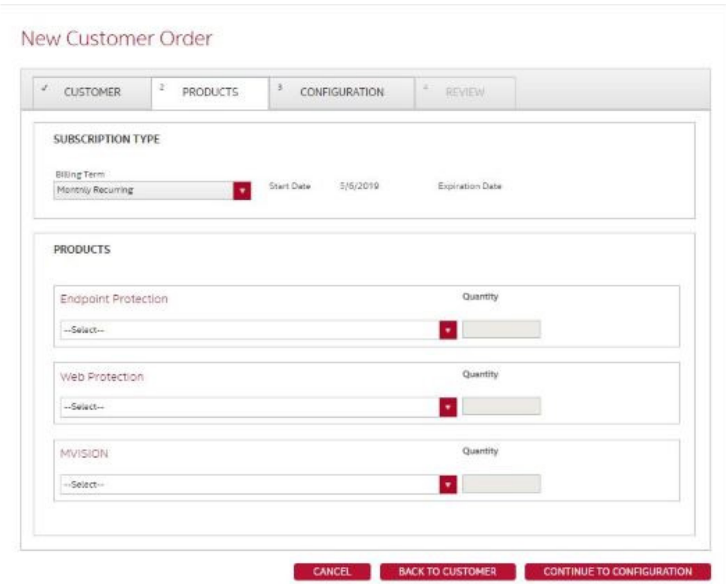
2. Within the Customer Account Details click on "Place Order"



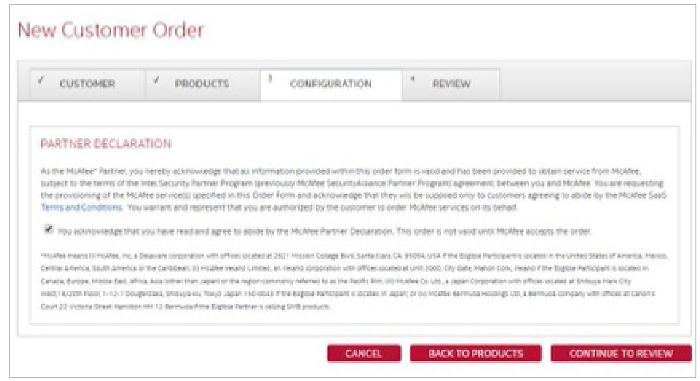
3. Select "Create Recurring" and click on continue



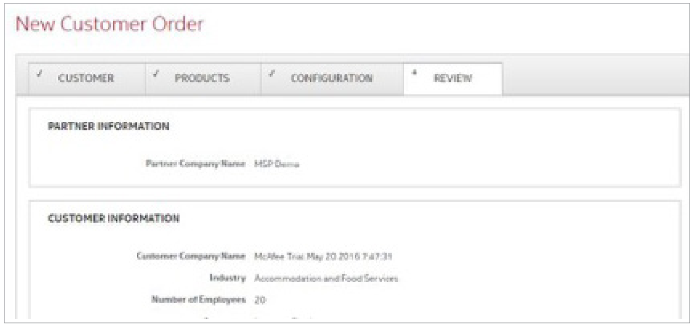
4. Within the Products screen, select the solution the customer has as a trial and input the final node count



5. Acknowledge the partner declaration and click on continue



6. Review the information and click on submit



7. The customer is now converted to a recurring order and will need to be reported to your distributor on a monthly basis in the sellout report

Partner Management of Sub-partners

With the adequate roles assigned (see below for user roles), a user has access to manage either his/her own primary partner profile as well as all sub-partner (child) accounts.

The ‘Partner Accounts’ link located under the ‘Partner Tools’ tab in the top navigation, allows you to access the Partner Accounts list page.

Details about all partners who are directly associated to the primary partner (partner selected in the partner drop-down at top of all pages) are displayed. The Partner Account list page displays information about sub-partners including location of the partner, partner type, as well as number of customer deployments under a given sub-partner.

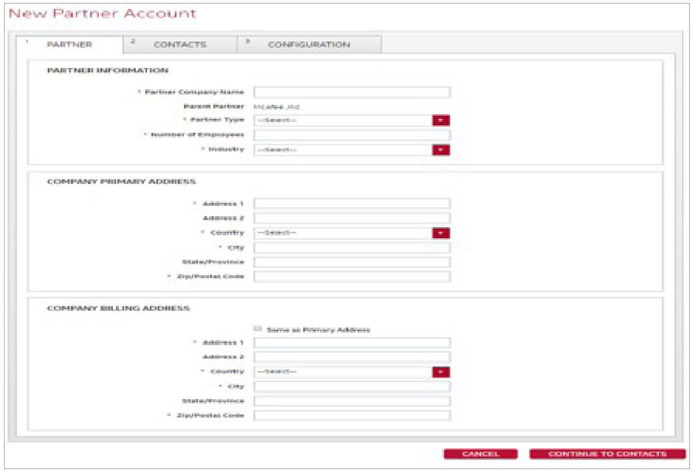
Tip: With the appropriate assigned roles, the PBC user can edit an existing partner in the same manner as if the partner user were to click on edit for their own Partner Profile account by simply clicking on one of the hyperlinked partner names in the list.

Creating a New Sub-Partner

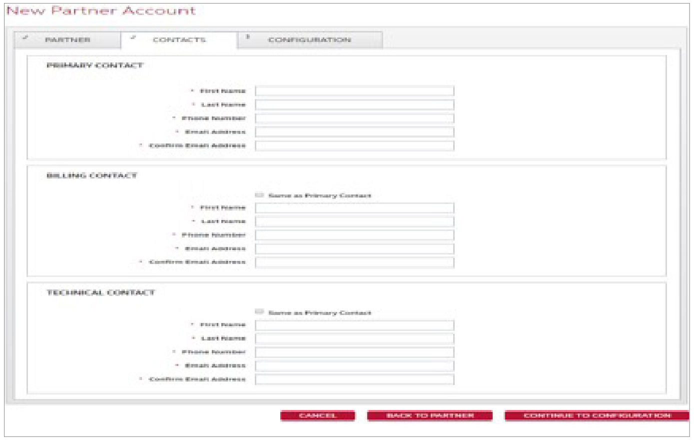
If you as a Partner have signed the appropriate Service Provider addendum that allows sub-partners, which ensures that you are responsible for actions and product deployments of your sub-partner(s), your PBC user has permissions to create sub-partners. Once you have the correct permissions, go to the ‘Partner Tools’ tab and select the ‘Partner Accounts’ option. Click on the “New Partner” button and proceed with the New Partner Account creation process.

For users with Full Access, a user will have permission to edit all information about the partner, including general partner information, partner contact information, and configuration information including details related to branding settings, language preferences, and email notification preferences.

Partner Information: Collects general data describing the partner company **and** provides you the ability to establish your organization’s primary information in PBC including name, partner type, address, etc.



Partner Contacts: Enter valid contact information for the partner’s Primary, Billing and Technical Contacts. Note: These contacts will be available on the customer’s order form to send order and activation email notifications to the selected contact. The Primary Contact will receive all emails directed to the Partner.

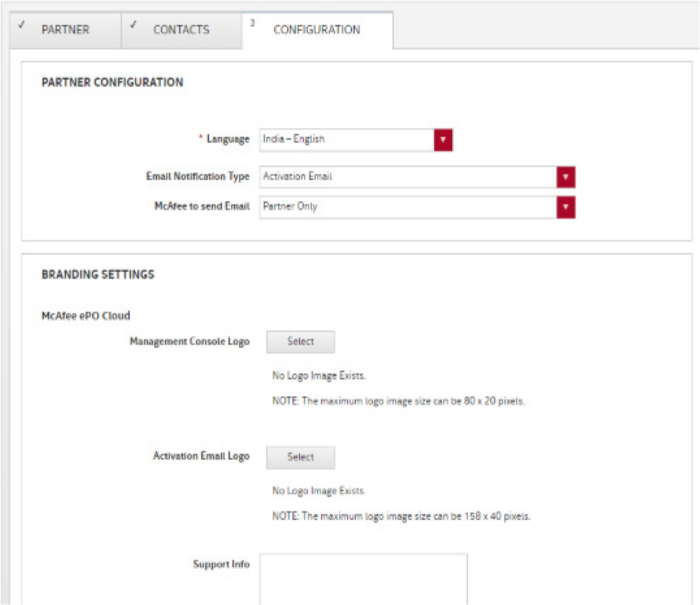


Configuration Information: Select partner preferences for language, security management, email notifications and branding.

Email Notification Type - specify what notification email(s) you or your customer would like to receive (None/Never, Order Notification or Order and Activation Notification)

McAfee to Send Email - SP customers have Managed Security, therefore the notification(s) should be sent to the Partner. The partner may then choose to forward this email to the corresponding end user.

New Partner Account



Branding Settings: Optionally specifies the logo, support info, and email address used to support branding in McAfee ePO Cloud. No branding options currently available for MVision ePO products.

- **Logo-** Specifies a logo image. The image must be 80 x 20 pixels for the product console logo and 158 x 40 pixels for the logo in email
- **Support Info-** Specifies support information. Limited to 1000 characters
- **From Email-** Specifies the email address partners use to brand email messages
- **Buy URL-** Specifies the URL partners use to brand the "buy" link

Submit to create new partner.

Edit a Partner Account

Use this task to edit your partner profile or edit another partner account if you are the **Parent Partner**.

Task

For option definitions, click **Help** in the interface.

1 Use one of the following:

To edit a child partner...	1 Select **Partner Tools** | **Partner Accounts** to open the **Partner Accounts** page. 2 Use the filtering options to find the partner and click the **Partner Name** to open the **Edit Partner Information** page.
To edit your partner profile...	Select **Partner Tools** | **Partner Profile** to open the **My Partner Account** page.

2 Select **Partner Tools** | **Partner Accounts** to open the **Partner Accounts** page.

3 Use the filtering options to find the partner and click the **Partner Name** to open the **Edit Partner Information** page.

4 Click **Edit**.

5 Update partner information and company addresses as necessary, click **Continue to Contacts**.

6 Review contact information, click **Continue to Configuration**.

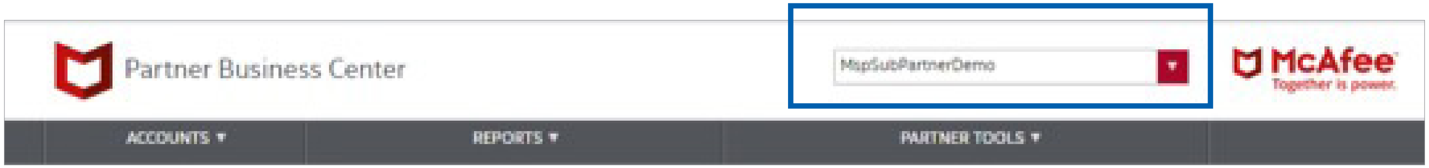
7 Update partner configuration as necessary, click **Submit**.

8 After successful completion, click **Continue**.

Resending a sub-partner user login Email

If one of the SP sub-partners has lost their login email to the PBC, the SP can resend the login email directly in the PBC. For Demo SP, the sub-partner name is "MspSubPartnerDemo".

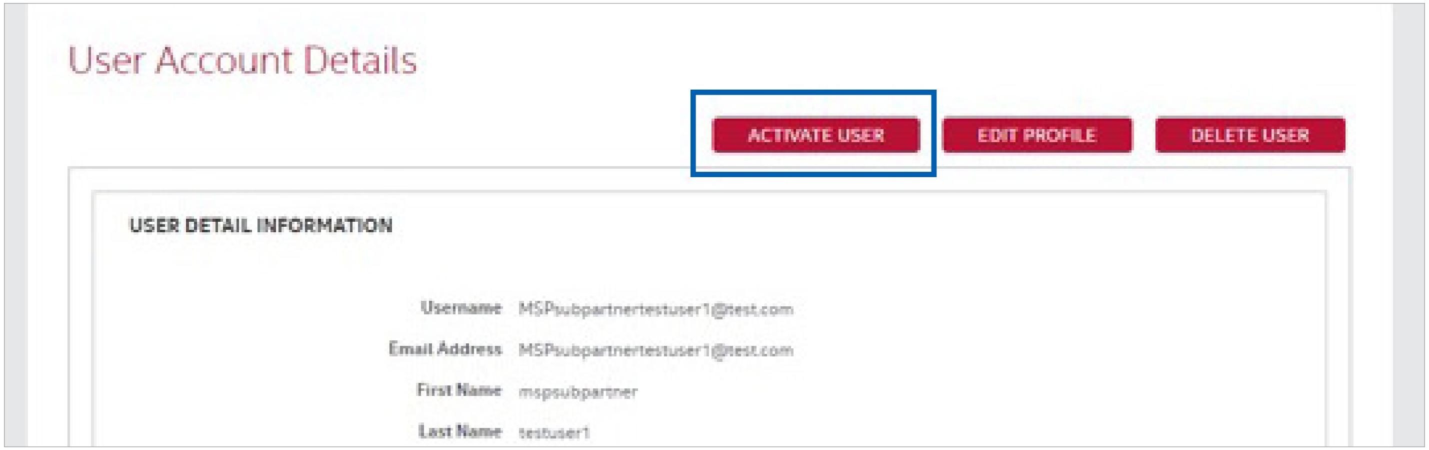
1. Click on required sub-partner account in their partner drop-down list under which this user was created:



2. Click Partner Tools -> User administration Tab

3. This screen will show the status for partner users created. If activated, then last login date would be shown. If not, then status would be unverified.

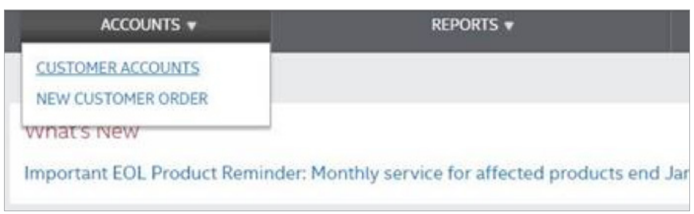
4. Click on partner user they would want to resend email for and click Activate User Button.
5. This will resend the Partner user Activation email.



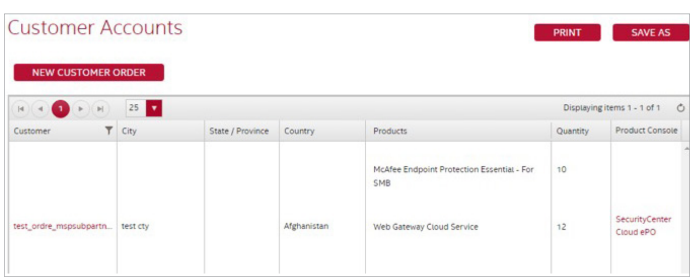
Re-sending a customer activation Email

If you as a Partner need to re-send an end user customer that is deployed under one of your sub-partners, you can also do so by selecting the sub-partner and then their relevant end user deployment.

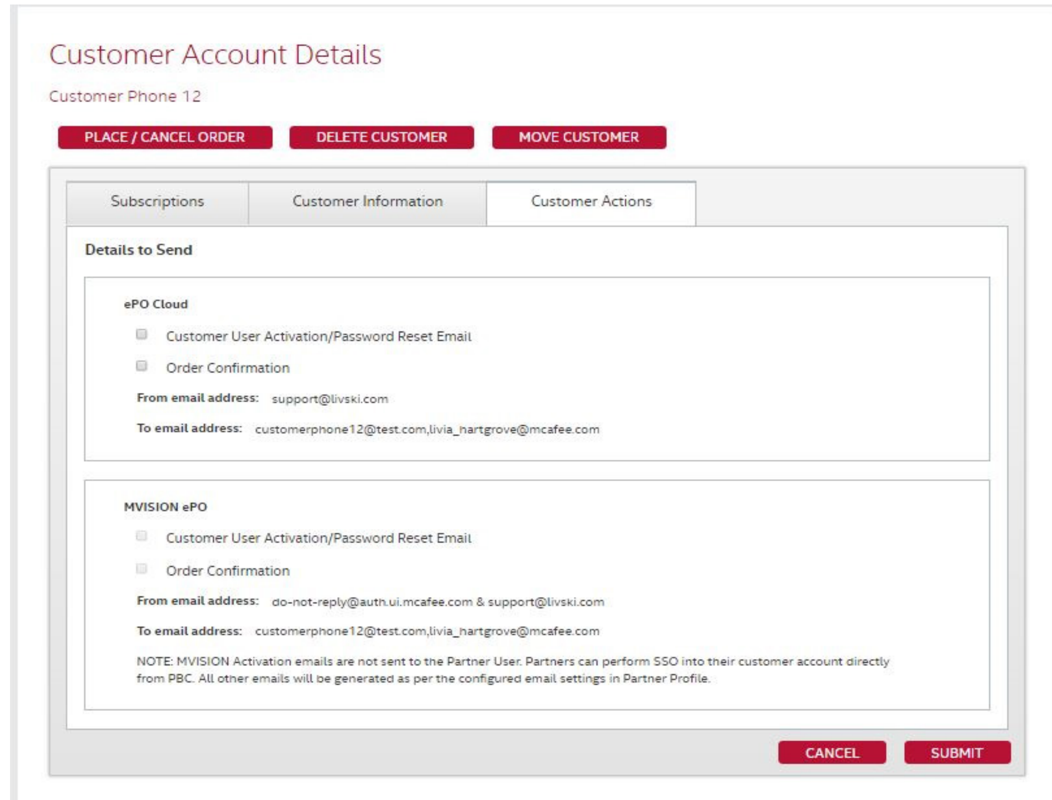
1. Select the required Sub-MSP partner account in the drop down under which customer account was created.
2. Click on Accounts -> Customer Accounts link.



3. Click on the customer record for which Activation email needs to be resent.



4. Go to Customer Actions TAB and click on the details you would want to resend and Submit.

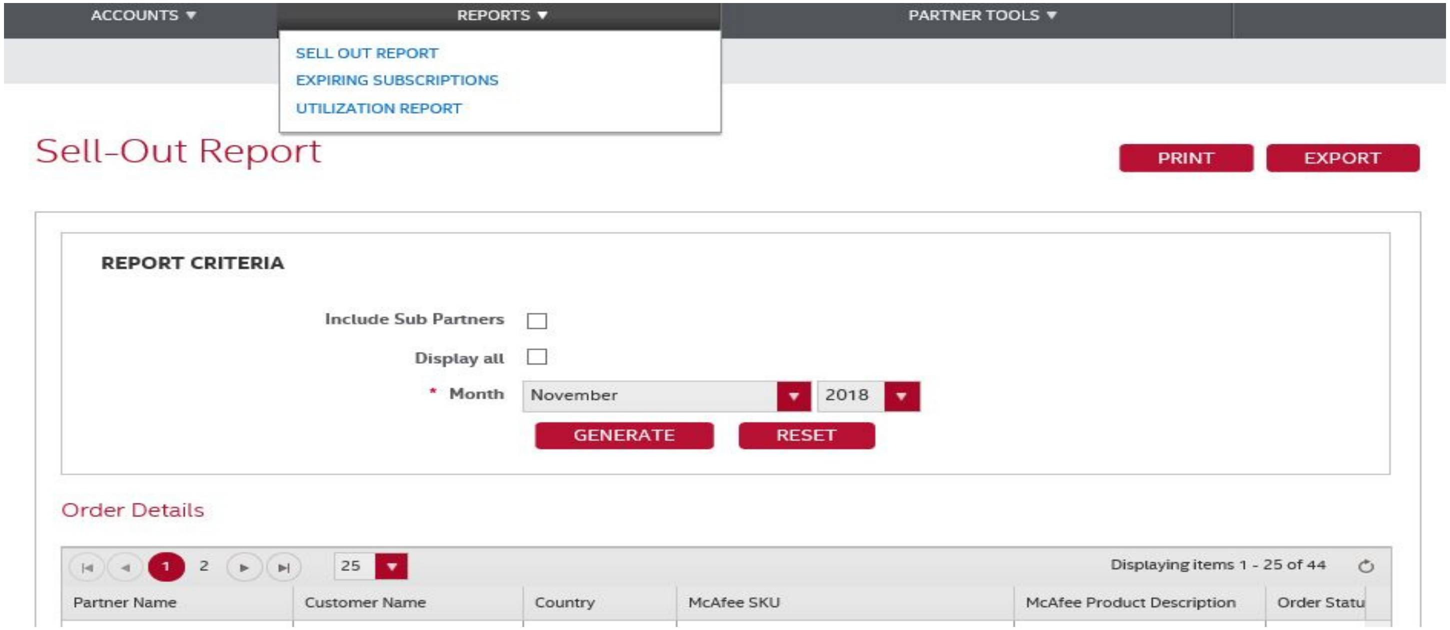


Reporting

By clicking on the Sell-out Report link under the main navigation Reports tab, partner user can generate a report that details product deployment information for a given period.

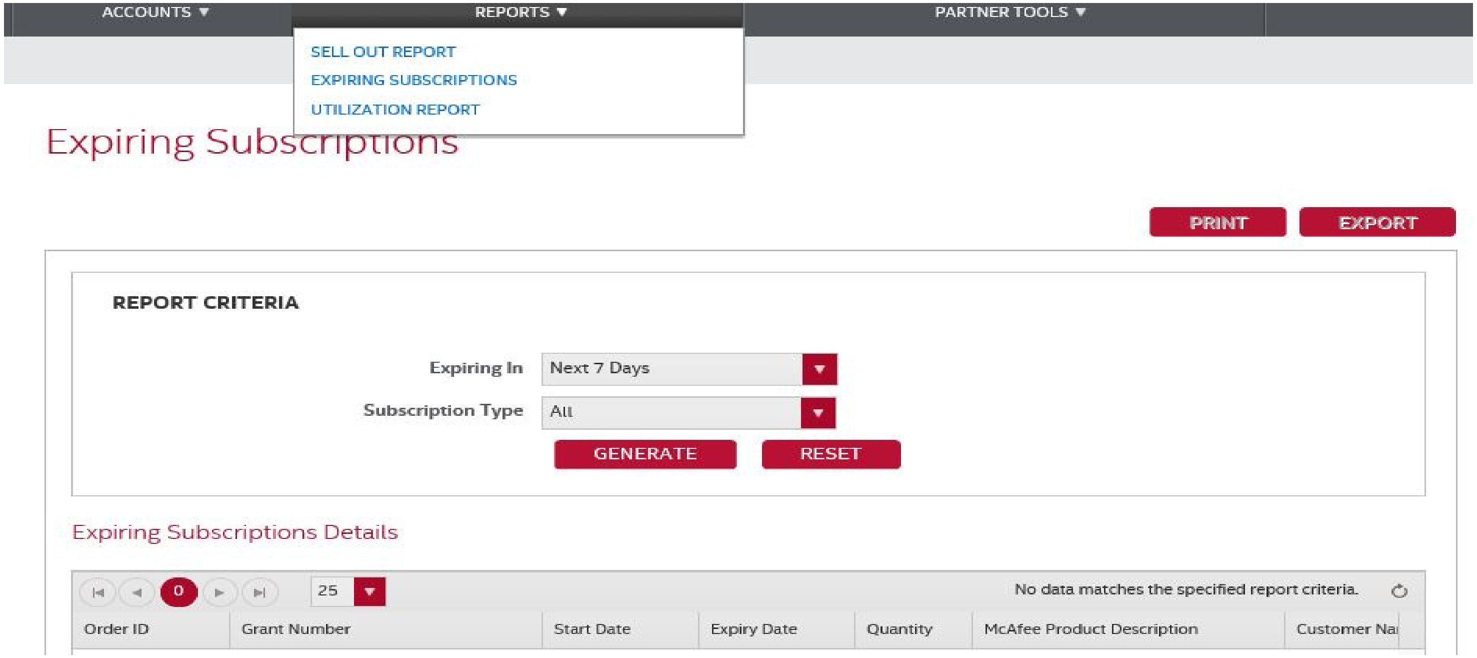
1. Sell-out Report period defaults to last full month on the calendar. User can choose other monthly reporting periods going back in history to when the partner began transacting business in PBC.
2. Sell-out Report page displays order details that depicts all order information for all active subscriptions for all customers directly associated to the partner for the given monthly period selected. Additionally, all order cancellations and order replacement activity will be depicted in the report.
3. User can choose to export report via the Save As button. Exported report is transformed into an intuitive Excel report detailing the same information as displayed on the Sell-Out report page.

Service Provider Specialization partners are required to submit monthly royalty reports, via an authorized Service Provider Specialization Distributor, to McAfee. The Sell-Out reporting feature in PBC can be used to help create these monthly royalty reports. Reference the Service Provider Specialization Program Guidelines for additional information on the reporting requirements.



The Expiring Subscriptions Report link under the main navigation Reports tab allows you to generate a report that details expiring subscription information for a given period.

1. Expiring Subscriptions Report period defaults to expiration period of next 7 days. You can choose other expiration periods listed in the drop-down, or provide a custom date parameter in the input custom input field.
2. Expiring Subscription Report page displays information for any and all expiring subscriptions that fall within the timeframe chosen in the 'Expiring In' parameters. If there are no expiring subscriptions that result when generating the report, no data will display on the page.
3. You can choose to export report via the 'Save As' button. Exported report is transformed into an Excel report detailing the same information as displayed on the Expiring Subscriptions report page.

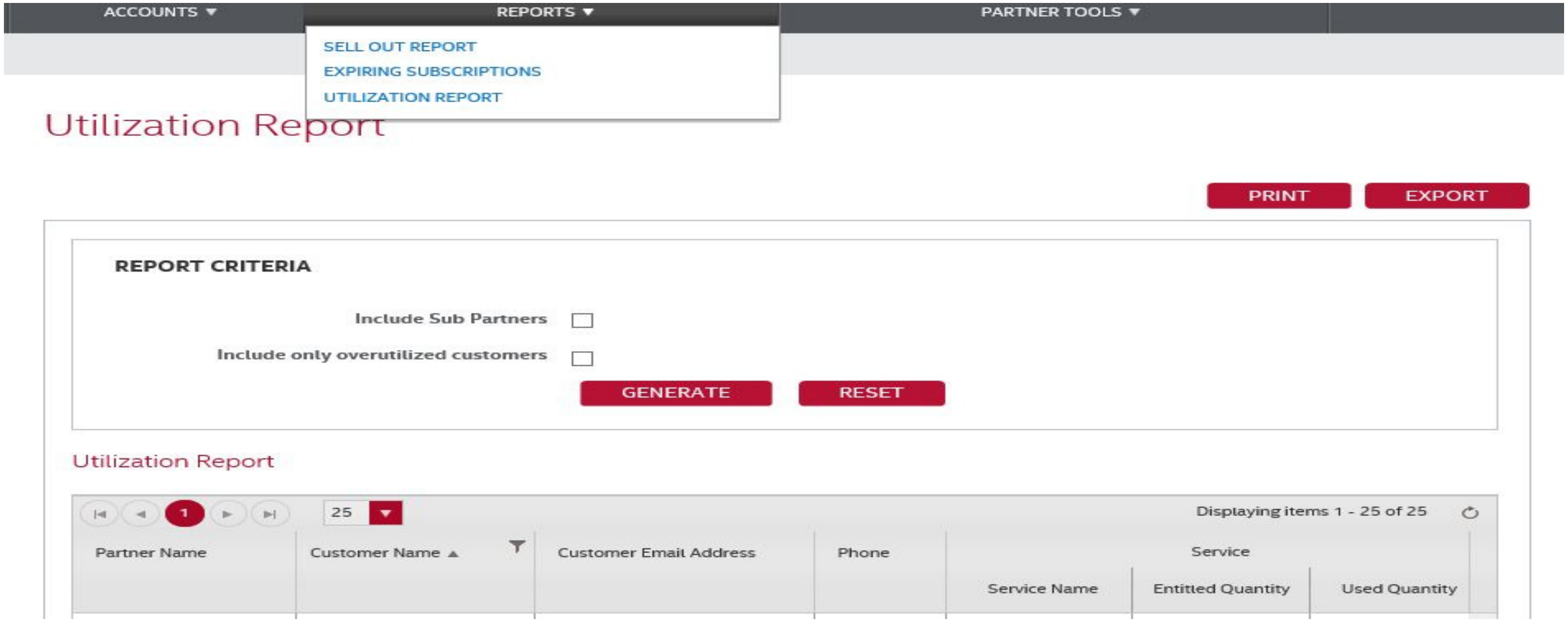


The Utilization Report link under the main navigation 'Reports' tab, allows you to generate a report that details product utilization information across all of the partner's customer deployments.

1. Utilization Report will display details associated to all active customer subscriptions such as number of licenses selected as ordered/ deployed vs. actual licenses installed. Keep in mind that only certain McAfee SaaS products today explicitly track product utilization information (e.g. SaaS Endpoint does, but SaaS Web does not).

   Note: Utilization information is displayed by the service level, as there are varying levels of service utilization across different SaaS services for a given customer. For example, if a partner's customer had ordered McAfee Security for Business product suite, the Utilization report will decompose utilization into several different services given the variety of security protection services associated to this suite offering.

2. Utilization detail will display entitled and used quantities for certain services that track utilization information. This utilization information allows you to determine if the appropriate level of product subscriptions have been ordered and are active for a given customer.
3. Additionally, by checking the "Include only over-utilized customers" checkbox, a report can be generated and will include only customers with service that is currently over-utilized compared to what has been ordered.



User Administration

With the adequate roles assigned (i.e. user management), a user has access to User Administration within PBC. User Administration allows you to manage your company access to PBC, roles, and user details.

The User Administration link located under the 'Partner Tools' tab in the top navigation. This takes you to the Users page. Details about all users who are directly associated to the primary partner (partner selected in the partner drop-down at top of all pages) are displayed. The Users page displays information about users including whether the user has activated his/her account and records the last login date.

By clicking on one of the hyperlinked usernames in the list, you can edit an existing user. The following can be edited on the user account:

- General user details such as name and phone number
- Roles
- Reset password
- Delete user account
- Email Address- This is **not** an editable field. You must delete and create a new user profile.

By checking at least one or more users in the user list and selecting "delete user", you can permanently delete a user from the PBC. Once deleted, a user will no longer be able to log into PBC.

Adding New Users

You also have the ability, at any time, to add new users to your PBC account. Simply click on the 'New User' button located on Users list page, to create a new user. Once you complete all the appropriate user details, select the settings that you would like the new user to have access to:

Assign User Role:

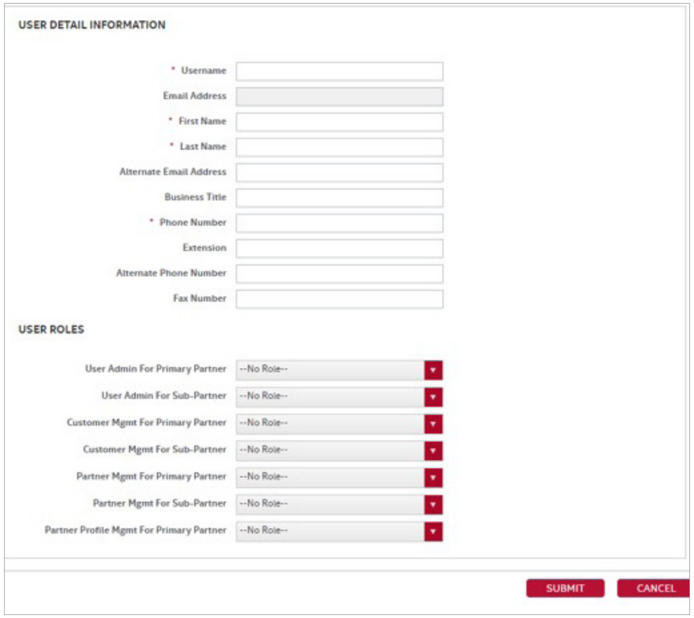
- User Admin for Primary Partner
  - Read Only: New user would only be able to view users associated to the primary partner and if relevant, to sub- partner(s).
  - Full Access: New user would have the permission to view/create/edit new users for the primary partner and if relevant, to sub-partner(s).
- User Admin for Sub- Partners
  - Similar roles as noted above, but user would only be able to view/create/edit users associated to the sub-partner

Assign Customer Management Access:

- Customer Management for Primary Partner
  - Read Only: New user would have access to view the customer list for the primary partner as well as any sub-partner(s).
  - Full Access: New user would have permission to view/create/edit customers associated to the primary partner as well as any sub-partner(s).
- Customer Management for Sub-Partner
  - Similar roles as noted above, but user can also manage the sub-partner's customers.

Assign Partner Management Access

- Partner Management for Primary Partner
  - Read Only: New user would have access to view the downstream partner(s) associated to the primary partner.
  - Full Access: New user would have permission to view/create/edit downstream partners associated to the primary partner.
- Partner Management for Sub-Partners
  - Similar roles as noted above, but user can only view/edit the sub-partner. Note: creating a partner under a sub-partner is not permitted in PBC.
- Partner Profile Management for Primary Partner
  - Read Only: New user can view the Partner Profile for their primary partner
  - Full Access: New user can create, update, delete as well as view the Partner Profile for their Primary Partner.



Questions?

For questions related to the Partner Business Center, please contact our Partner Care Team at MSPPartnerCare@McAfee.com

About McAfee

McAfee is one of the world's leading independent cybersecurity companies. Inspired by the power of working together, McAfee creates business and consumer solutions that make the world a safer place. By building solutions that work with other companies' products, McAfee helps businesses orchestrate cyber environments that are truly integrated, where protection, detection and correction of threats happen simultaneously and collaboratively. By protecting consumers across all their devices, McAfee secures their digital lifestyle at home and away. By working with other security players, McAfee is leading the effort to unite against cybercriminals for the benefit of all.

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