Setting up your DataTill

A DataTill guide on how to complete your setup.

6/22/18

DataTill (Pty) Ltd

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1. Setting Everything Up

The purpose of this guide is to help first time DataTill clients to finalise their setup. This will also help new clients in understanding DataTill's role within the setup process and what is expected of the client.

How much does the DataTill support team help with setting everything up?

After you have signed up with DataTill and an install has been scheduled and done, then you are ready to start setting everything up. The DataTill support teams will only do a general setup which includes the following:

- Add general company information,
- radius server setup,
- internal Netflow setup,
- the default helpdesk department,
- outbound messages (To be changed to your mailbox settings.)
- and an admin user for you to start with.

On a settings level, you will need to set up the following:

- Netflow on routers,
- mailbox settings,
- FTP backups.

Then you will need to set up each module/ feature that you would like to use. This is usually done as part of your free month demo/ trial period.

The DataTill support team does not:

- Do data capturing
- Help you get your import templates ready
- Do the actual importing

What do I do if I need assistance?

- Refer to blogs and guides on our website.
- Refer to the videos on our YouTube channel
- General queries on DataTill modules, functions or technical support, you are welcome to call or email our support team.

If you need more assistance in setting things up or training staff, you are welcome to ask for a quote and book training sessions with us. Contact support@datatill.com to book a training session that will happen via Skype. Other applications such as TeamViewer may also be used in a training session.

Guides and more information:

Please see the following resources for additional information:

- Guides: http://www.datatill.com/guides/user-manual/
- Blogs: http://www.datatill.com/blog/
- FAQ: http://www.datatill.com/faq/
- For a system overview/demo, please see our YouTube channel (system overview playlist): https://www.youtube.com/playlist?list=PLiy0Vjwe5LmrPS4b-v0yB7KnkiSZqZsLa

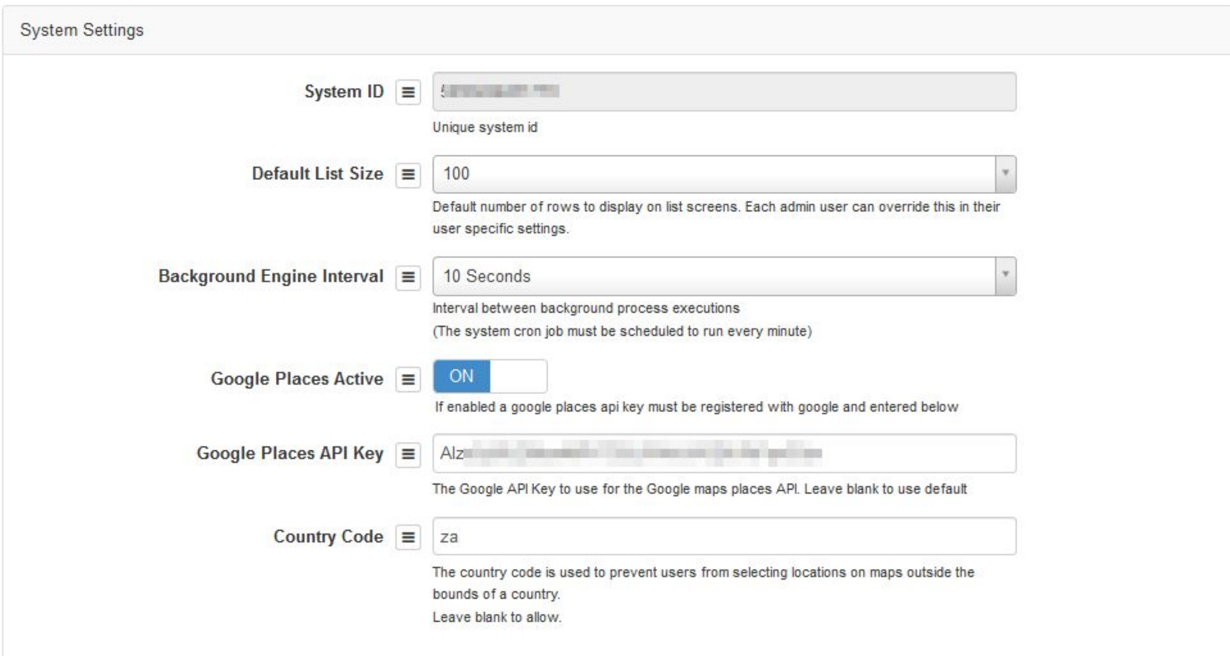
1.1. Recommended order of initial configuration

1. System and Company
2. Sage One integration
3. Billing and Billing Groups
4. Payment Gateways
5. SMTP
6. Notifications and SMS Gateways
7. Backups
8. Admin Users
9. Help Desk
10. Mailbox Scrapers
11. NAS, devices and SNMP
12. Radius Services
13. Data Packages
14. Sales
15. Customers
16. Marketing
17. API (If you would like to use the API)

DataTill

2. System Setup:

To find your system settings, you will need to go to setup - system settings and then click on the relevant option that you would like to set up.



2.1. Company Details

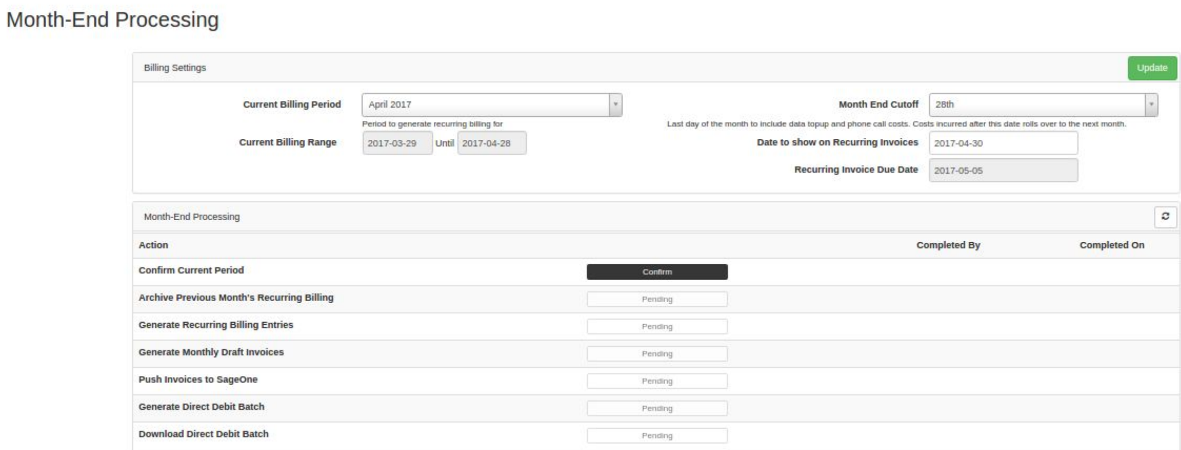
To find your company details, go to your system settings and then click on the company option.
Click on **Setup –> System Settings –> Company**
On this screen, you will need to check that all your company details are correct and that the correct logo has been added to the system. Please be diligent when working through these details. If you made any changes to these settings, remember to click on the update button found on the bottom of the screen.

2.2. Billing Setup and Sage One Integration

This section will only be applicable to companies who are planning on using the billing module. To be able to use our billing integration, you will need to have a Sage One account. To integrate your Sage One account, go to your system settings and then click on the accounting integration option. Add your SageOne username and Password, click on the update button and then click on the refresh button found on the right-hand side of the SageOne company ID. You should now be able to choose your company from the drop-down list. For more information, please refer to the **Billing Guide**.

2.2.1. Billing Setup

The billing can be set up following this guide: **Billing Setup**



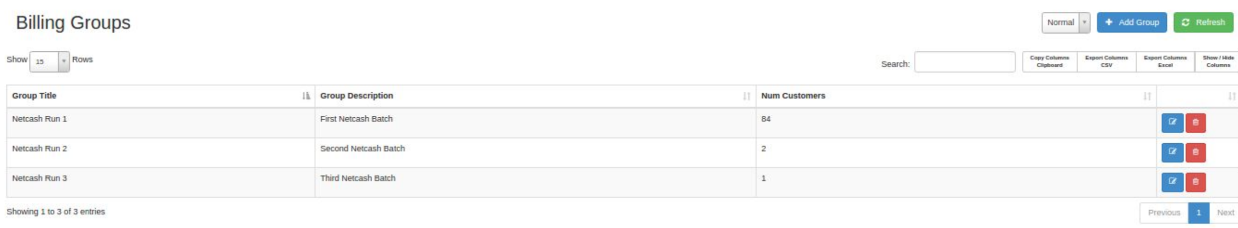
You billing set up consists out of a few different factors. Please be as diligent as possible when setting up the following items:

- Billing Setup - **Billing Guide**
- Invoice and credit note setup - **Billing Guide**
- Suspensions - **Account Suspensions Guide**
- Cancellations - **Account cancellations Guide**
- Month-end processing - **Month End Processing Guide**

In the billing setup, you will need to configure your billing groups, default tax rate and your billing period. From here, you will also need to set up the suspensions and cancellation module. To find your billing setup, go to billing - billing setup and then click on the billing setup option. To set up your invoices, credit notes and banking details, please go to billing - billing setup and then click on the invoice and credit note setup button.

2.2.2. Billing Groups

Please refer to the **Billing Setup**



2.3. Payment Gateways

DataTill currently has four payment gateways with which we can integrate. These four payment gateways are:

- Payfast
- Sagepay
- VCS
- PayPal

To set up the payment gateways, go to settings - system setup and then click on the payment gateways option. After the screen has loaded, add the details for the relevant payment gateway(s) and then click on the update button.

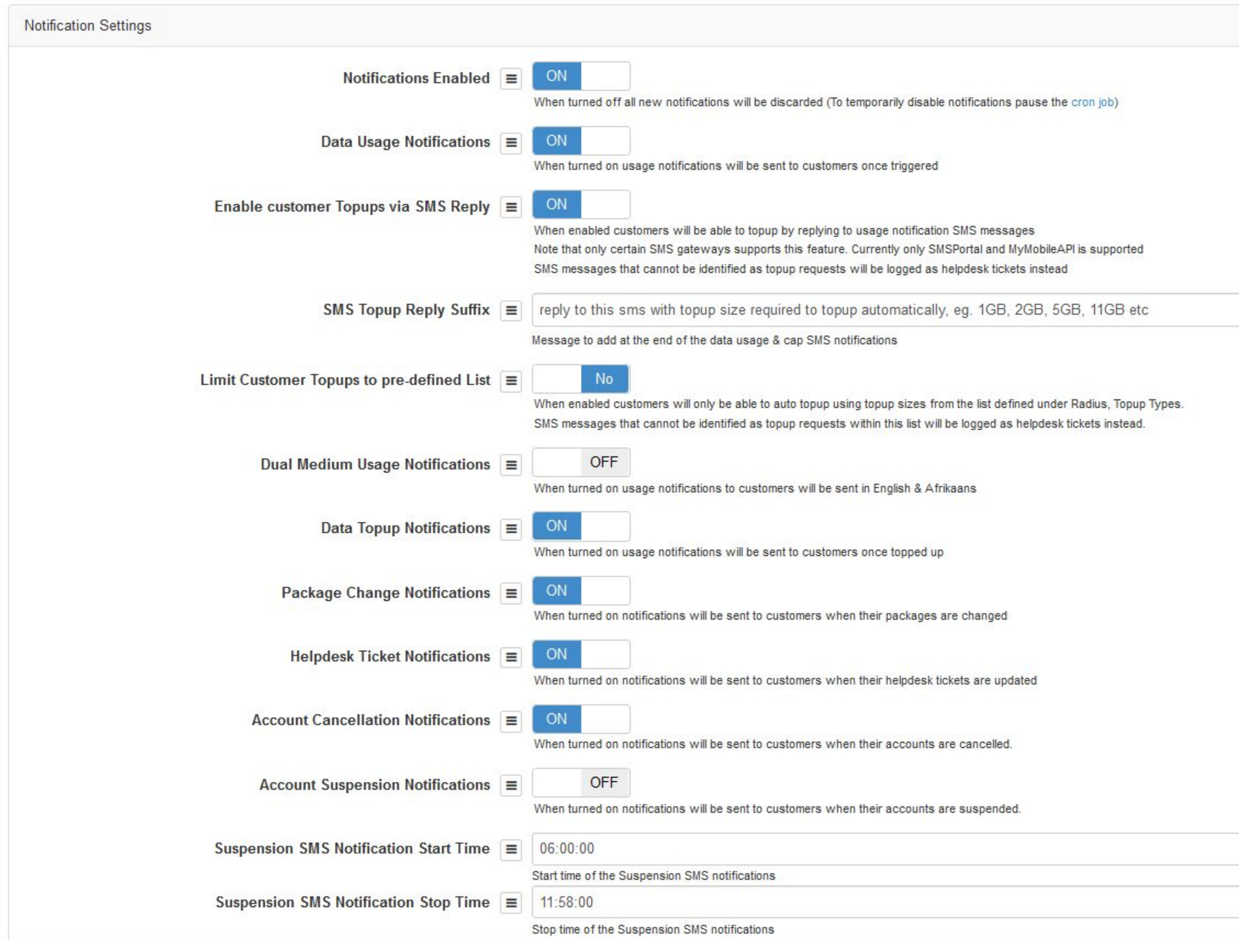
2.4. SMTP

To set up your SMTP, you will need to go to system settings and then click on the mail SMTP settings option. Complete all the details on the screen and then click on the update button.

2.5. SMS Gateways

Click on **Setup –> Notification** to set up DataTill's system notifications and setup an SMS Gateway.

This section is only relevant to companies who are planning on using DataTill's SMS functionality. To add your SMS gateway to DataTill, go to the setup menu and then click on the notification option. After the screen has loaded, scroll to the bottom to find the SMS gateway settings. Choose your sms gateway from the drop down menu, add the username and password and then click on the update button.



2.6. Backups

Each ISP is responsible for their own backups. We would advise all our customers that their backups go to a FTP server that is off site. To set up your FTP server on DataTill, go to system settings and then click on the systems backup option. After the screen has loaded, add all the details and then click on the update button. Your backups will take place daily.

Guide on setting up automated backups: **http://www.datatill.com/guides/automated-backups/`**

3. Users, helpdesk and mailbox setup.

After you have completed all the relevant setup above, we would advise that you start with the following:

- Creating your Admin users
- Doing your helpdesk setup
- Setting up your mailboxes.

3.1. Admin Users

Go to **Setup –> Admin Users**.
Just create a few users for now. These are users created for your employees to work on the system.

To set up your admin users (company employees), you need to go to setup and then click on the admin users option. From here, you will be able to:

- Add new users,
- edit admin users,
- duplicate user profiles,
- send reset password emails.
- And remove users.

To add new users, you will need the the user's full name, email address and mobile number

- Fullname
- Email address
- Mobile number.

You will also need to assign a username and permissions for the users. After creating the user, remember to send them a password reset link. Next, you will need to complete your helpdesk setup and assign your users to specific departments.

3.2. Helpdesk

Before starting your helpdesk setup, you will need to enable to your helpdesk module. To do this, go to your system settings and then click on the helpdesk option. After the helpdesk module has been enabled, you will need to:

- Create the relevant departments i.e. accounts / operations / sales / support / etc.

- Link admin users to these departments.
- Create and link categories to the departments
- Create your helpdesk reasons.

For a more detailed guide on how to do your helpdesk setup, please refer to our **Helpdesk Setup Guide** on our website.

Click on **Workflow –> Helpdesk Ticket List** to see all helpdesk tickets.

3.3. Setting up your mailboxes

After you helpdesk has been set up, you will need to set up your mailboxes as well as your mailbox rules. To set up your mailbox, go to your system settings and then click on the mailbox scraping option. Please note that each department will need their own scraper. You cannot have the same scraper in different departments.

After your mailboxes have been set up, you can set up your mailbox rules. This can be done by going to system settings and then clicking on the mailbox scraping rules option. For a more detailed guide on how to set up your mailbox scraper or mailbox scraper rules, please refer to our **Mailbox Scraping Guide** on our website.

4. Network Setup

4.1. NAS

To set up your NAS list, you can go to radius and then click on the NAS list option. Please note that when adding your NAS that it needs to be linked to your corresponding network device.

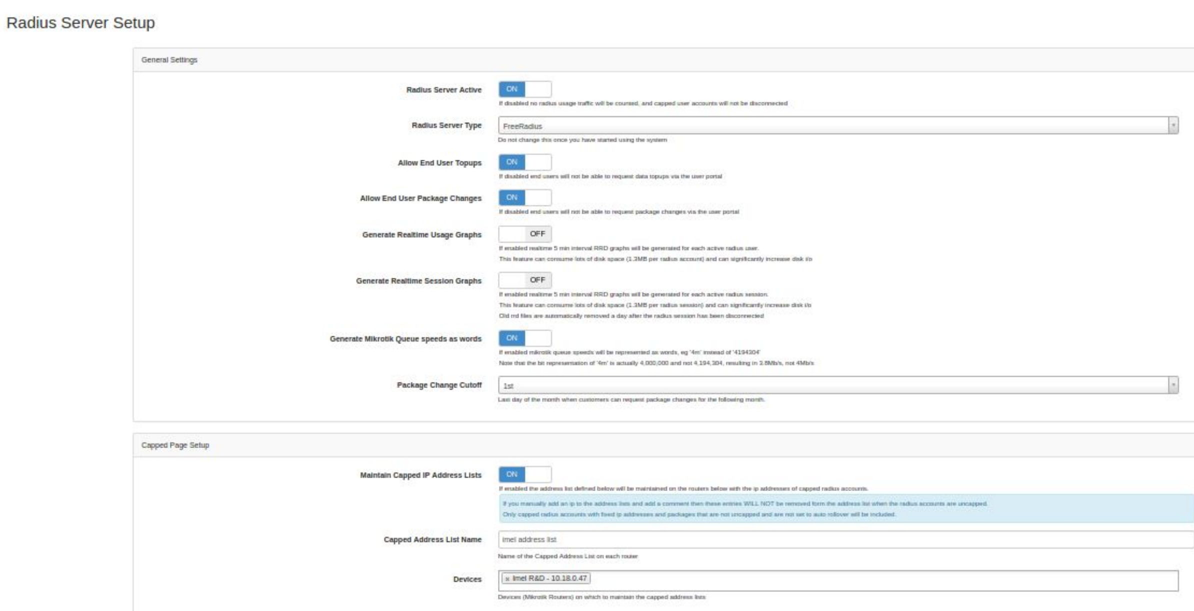
4.2. Devices and SNMP

To add your network devices, go to devices - network devices and then click on the network devices option. Here, you will be able to see a list of all your current devices with their scan status. You will also be able to add a device from here.

When adding your devices, please ensure that your logins are working and ensure that you SNMP is in relation to what you MikroTik is saying.

4.3. Radius Setup

This should already have been configured by the DataTill staff when the install was done.



4.4. Radius Services

This section is applicable to customers who do not use IP Accounting. To set up your radius services, go to radius and then click on the radius services option. When setting up your radius services, you will need to set up your:

- Package cap
- Package speed
- What the service once capped is (if you are throttling customers).
- And determine whether the package is:
  - Monthly (all packages)
  - Once-off (hotspots)

For more information, please refer to the **Radius Guide** on our website.

4.4.2. If you have existing Radius data you would like to import

Click on **Radius –> Import Wizard –> Import from Radiusmanager/ CSV**
The Radius Import will import the following:

- Radius Services
- Data Packages
- Customer Groups
- Customers
- Radius User Accounts
- NAS List
- Static IP's

If you do the Radius import, the system will guide you through the process, and give you more information about the import before proceeding. Go and click on the Radius import and more information will be provided.
Imported data can be deleted at any time. Just go back to step 4 and the option to deleted the imported items will be there.
Guides on the import wizards can be found here: Import Guides

4.5. IP Accounting

DataTill also enables ISPs to make use of IP accounting to track the data usage for their customers. For more information on IP account, please refer to our **IP Accounting Guide**.

4.6. Data Packages

After you radius services has been set up, you will need to create your data packages. To do this, go to billing - products and then click on the data products option. This is what the customer will see on their invoices.

When creating your data packages, you will need to:

- Give your package a name
- Give your package a price
- Assign it to the relevant radius service.

Please note that if the data package should be hard capped, please do not link a service once capped product to the data package. A service once capped package should only be linked if you are throttling the customer.

4.7. Hotpots

DataTill can also enable ISP's to configure and use hotspots. To do this, you will need to configure and set up the following:

- Hotspot Settings
- Landing Page
- Walled Garden Entries
- Hotspot IP binding
- Once-off radius services
- Hotspot data packages
- Your routers.

For more information on how to set up the Hotspots in DataTill, please refer to our **Hotspot overview guide**. For more information on how to set up your MikroTik router for hotspots, please refer to our **Hotspot setup Guide**

5. Setting up other modules

5.1. Sales Setup

Our sales module enables you to use the lead to receipt process. In this manner, you can easily track all new leads that have come in right to the end where quality control takes place. Please note that for this to work correctly, you will need to have the billing module enabled.

For more information, please refer to the:

- Sales Setup Guide
- Lead to receipt guide

5.1.1. Departments involved

When doing the lead to receipt setup, you will need to assign employees from different departments to the following sections. The section below should be used as an GUIDELINE only as it is up to the ISP to decide how this needs to be set up.

Lead to Receipt section	Task	Suggested department to manage section.
Leads	Capture Leads	Sales
	Assign incoming leads	Sales Manager
	Mark whether site survey is needed or not.	Sales
Site Survey	Schedule site survey	Operations
	Mark site survey as success / failure.	Operations
Quotes	Create Quote	Sales
	Send Quote	Sales

Customer Create	Create customer	Sales / Accounts
	Check customer details	Sales / Accounts
	Add payment method	Sales / Accounts
Jobcards	Schedule job	Operations
	Mark job as complete	Operations
Billing	Generate invoice	Accounts
	Push invoice to SageOne	Accounts
Customer Care	Acknowledge ratings	Customer Care / Sales / Accounts
	Follow up on bad ratings	Customer Care / Sales / Accounts
Customer Update	Accept or Reject customer requested changes.	Accounts / Customer Care
Compliance	Collect and upload compliance documents to customer profile.	Accounts / Sales

5.1.2. Calendar

If you are planning on using the lead to receipt module, you will also need to ensure that you have set up your calendar. To do this, go to **tools → calendar.** On the left-hand side of the calendar, you will be able to add your different calendars i.e. leave / site surveys / installations / call outs etc.

You will also need to add your different teams and assign colours to them. The team section can be found at the bottom left-hand side of the calendar. To be able to add your teams, you will need to ensure that they have been added as admin users on the system.

For more information on how to set up your calendar, please refer to our **calendar guide**.

5.2. Marketing Setup

Under our marketing module, we have two modules that you can use:

- Resellers
- Refer a friend

5.2.1. Resellers

To enable our customers to better manage their resellers, we now have a reseller module. With the reseller module, you can determine whether you resellers ear once off commission or monthly commission as well as determine whether they will receive specific amounts or a specific percentage.

For more information on the reseller module and the reseller module set up please refer to our **Resellers guide**.

5.2.2. Refer a friend

This module will enable the ISPs customers to refer their friends and then receive some credit if their friends successfully sign up with your ISP. The referer will be able to receive credit towards to the value of their friends' chosen data package.

For more information on the module and how to set it up, please refer to our **Refer a friend guide.**

5.3. Customers

To ensure that your customers are setup correctly, we would advise that you set and link the following to your customers:

- Customer Groups
- Categories.

The customer groups will make it easier to report on specific groups or customers as well as make it easier when it comes to fixing global issues.

The customer categories is a necessary field when it comes to auto rollover of data and the refer a friend module. For more information on customer usage notifications, data transfer or data rollover, please refer to our **ICASA regulations governing data usage blog**.

5.4. LTE-A

By using DataTill, you will also be able to access and sell RAIN and Cell-C LTE-A. This works through the Internet Solutions API. To be able to use the LTE-A module, you will need to:

- Become an Internet Solutions Reseller.
- Have the LTE-A module enabled on our DataTill instance.
- Be registered with one of the following credit card vendors:
  - SagePay
  - PayFast
  - PayPal
  - VCS
  - PayU
  - Snapscan

For more information on LTE-A and how it works within DataTill, please refer to our **IS LTE-A Guide**.

5.5. Mobile App

DataTill also has a customer mobile app which can be downloaded on android and apple phones as well as tablets. The app will enable admin users and customers to quickly view their tickets, usage, do top ups, view and download invoices as well as view or request information updates.

For more information on our customer mobile app, please refer to our **Customer Mobile App Guide** on our website.

6. API

This section is only applicable if you are planning to use the API. This API can be used to integrate DataTill into another system, service or website. An example of this is the customer mobile Android/ iOS app from DataTill that uses the API to communicate with your DataTill instance. Another example is to use the API on your main company website to let your customers submit helpdesk tickets to your DataTill directly from your main company website.

If you don't know what an API is please click [here.](#)

6.1. Where to find your DataTill system's API guide:

[your datatill url]/api

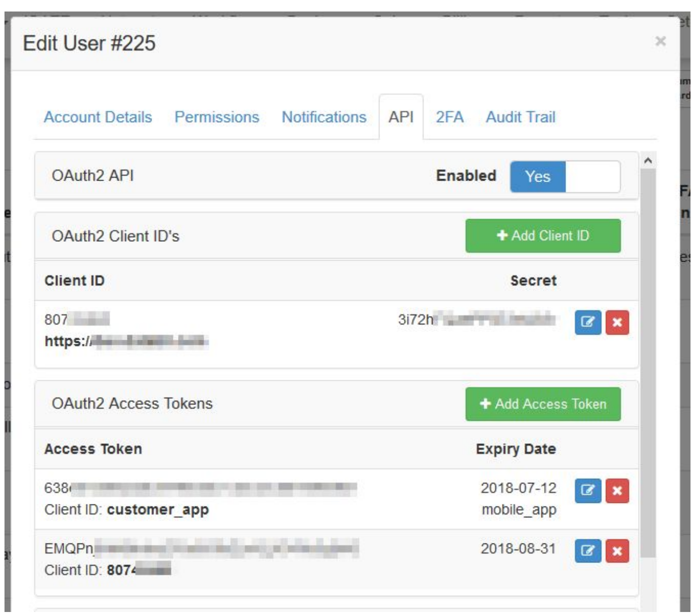
example : my.datatill.com/api

6.2. Guide for testing OAuth:

https://my.datatill.com/api/v1/guide?call=test

6.3. Getting an access token

Go to Setup, Admin Users, Edit User (Edit user you would like to use with the API), API tab



6.4. Add the access token to the URL and test the URL

Example:

https://my.datatill.com/api/v1/test?access_token=EMQPxxxxxxxxxxxxxxxxxxxxxxxxxx

Valid access token result:

Invalid access token result:

7. Operational Guidelines Overview

These guidelines are to show what type of tasks there are to do on DataTill, where to find it on the system and which departments or user roles may be best suited to do those tasks. This is just an overview and does not include all functions available throughout the DataTill system.

Disclaimer:
The operational guidelines given are guidelines only and may vary according to your own business rules and features/ modules enabled on your DataTill system.

Operational Guidelines				
Department Name	**Admin user role**	**ID**	**Tasks/ Responsibilities on DataTill**	**Where to find this in DataTill**
Support (Alternative : Helpdesk)	Support	1	Working on support type tickets in helpdesk ticket list.	Go to Workflow → Helpdesk ticket list
		2	View customer's data usage and adding topup for customer.	Go to Customers → Usage Details
	NOC (network operations center)	3	Working on escalated technical support type tickets in helpdesk ticket list.	Go to Workflow → Helpdesk ticket list
		4	Working on network devices and network tools.	Go to Devices
		5	Adding and managing radius services.	Go to Data (Previously called Radius menu.)
	Helpdesk manager	6	Setting up helpdesk ticket escalations.	Go to Workflow → Helpdesk Setup → Escalation Rules
		7	Setting up checklists for helpdesk tickets.	Go to Workflow → Helpdesk Setup → Checklist templates
		8	View helpdesk summary, statistics and performance of support staff.	Workflow → Helpdesk Stats
		9	Managing the helpdesk and support employees.	Go to Workflow → Helpdesk ticket list
Operations (Alternative	Technician/ operations	10	Working on site surveys and job cards in the sales workflow.	Sales → Sales Settings → Sales

: **Technicians)**	user			Setup And Workflow → Sales Workflow
		11	Working on helpdesk tickets linked to a site-survey or job card.	Go to Workflow → Helpdesk ticket list
	Operations manager	12	Working on escalated helpdesk tickets, assigned or notified to them.	Go to Workflow → Helpdesk ticket list
		13	Viewing operational statistics.	Go to Workflow → Workflow Summary Go to Reports → Statistics → Operational Statistics
		14	Sending out bulk messaging for customers per NAS/ highsite. Blog: http://www.datatill.com/bulk-messaging-datatill-explained/	Go to Devices –> Mikrotik NAS Users
		15	Managing jobs/ operations calendar.	[your DataTill URL]/calendar
Accounts (Alternative : Finance)	Accounts clerk	16	Working on accounts type tickets in helpdesk ticket list.	Go to Workflow → Helpdesk ticket list
		17	Billing documents such as invoices and credit notes.	Go to Billing → Invoices
		18	Working on accounts workflow for suspension and cancellation approvals.	Go to Workflow → Accounts Workflow
		19	Managing customer profiles/ customer accounts.	Customers → List Customers
		20	Schedule package change for customer.	Customers → List Customers → Edit Customer → Package Changes block
		21	Approving customer requested account changes.	Go to Workflow → Sales Workflow → Customers → Update
	Financial manager	22	Managing products and pricing.	Go to Billing → Products
		23	Doing the billing run/ month end	Go to Billing → Month

			processing. Guide: http://www.datatill.com/guides/user-manual/complete-month-end-billing-run-datatill/	end processing
		24	Working on escalated accounts type tickets in helpdesk ticket list.	Go to Workflow → Helpdesk ticket list
		25	Viewing statistics, reports and exception reports.	Go to Billing → Exception Reports
		26	Month end consolidation between DataTill and Sage One.	Go to Billing → Invoices Go to Billing → Age Analysis Go to Billing → Sage One Data
Sales	Sales person	27	Working on sales leads in sales workflow. Mainly working on leads in the following statuses: Leads, Quotes, Customers, Ratings.	Go to Workflow → Sales Workflow
	Sales manager	28	Assigning and re-assigning sales leads. Managing sales persons. Managing ratings Setting up quote templates.	Go to Workflow → Sales Workflow
All	General manager	29	Helpdesk ticket escalations assigned or notified to general manager.	Go to Workflow → Helpdesk ticket list
		30	Sending out bulk messaging for customers from list customer screen. Blog: http://www.datatill.com/bulk-messaging-datatill-explained/	Go to Customers **–>** List Customers
		31	Viewing dashboards and statistics.	Go to Workflow → Workflow Summary Go to Reports → Statistics → Operational Statistics Go to Workflow → Helpdesk Stats
	Server and setup	32	Setting everything up as per this “Setting Everything Up” guide.	Go to Setup
		33	Managing admin users and their permissions.	Go to Setup → Admin Users