

# Partner Management Console Administrator's Guide

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# Customizing your Home page

This chapter includes the following topics:

- [Home page widgets](#)
- [Activating a serial number](#)

## Home page widgets

Widgets are tools to make your **Home** page more useful to you. The first time you log on to your account, every available Widget is displayed. You can drag and drop widgets to order the page as you like it. If your **Home** page appears too cluttered for your taste, you can remove or add widgets as needed.

The **Home** page **Display** filter on the upper right side enables filtering by customer. The widgets then reflect the condition of a selected customer's account and network for quick evaluation. The feature also temporarily displays additional customer information to the **My Profile** widget. Using this feature, the **Home** page quickly provides you the details that would otherwise require you to run a report.

See [“Viewing a customer's profile”](#) on page 16.

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**Note:** The **Customer Issues**, **News Alerts**, and **Threats Summary** widgets do not become customer-specific when the **Display** drop-down is used to view a single customer on the **Home** page.

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Table 1-1 Widgets

Widget name	Description
<b>Customer Issues</b>	<p>Enables you to view customers in need of your attention. The widget enables you to sort your customers by:</p> <ul style="list-style-type: none"><li>■ Severity</li><li>■ Customer Type</li><li>■ Date (range)</li></ul> <p>The table presents the customer issues search results and links you to relevant alerts.</p>
<b>My Profile</b>	<p>Displays the information about your membership, customers, and products deployed:</p> <ul style="list-style-type: none"><li>■ Partner Name</li><li>■ Member Since date</li><li>■ Total Installed</li><li>■ Manage Account</li></ul> <p>See <a href="#">“Managing your customer's Symantec Endpoint Protection Small Business Edition cloud account”</a> on page 24.</p> <ul style="list-style-type: none"><li>■ Total Customers - Displays number of customers who are Partner Managed, Customer Managed, or Co-Managed.</li><li>■ Product Usage Summary - Displays number of paid and trial customer licenses.</li></ul>

Table 1-1 Widgets (*continued*)

Widget name	Description
<b>Quick Tasks</b>	<p>Displays the commonly performed tasks and links to them.</p> <ul style="list-style-type: none"><li>■ Add a customer. See <a href="#">“Adding a new customer in the Partner Management Console”</a> on page 14.</li><li>■ Import existing customer See <a href="#">“Importing an existing customer into Partner Management Console”</a> on page 16.</li><li>■ Activate a product or trial. See <a href="#">“Converting trials and adding paid services to an account”</a> on page 20.</li><li>■ Manage the customer's product. See <a href="#">“Managing your customer's Symantec Endpoint Protection Small Business Edition cloud account”</a> on page 24.</li><li>■ View the most recent <b>Executive Summary Report</b>. <b>Note:</b> The <b>Executive Summary Report</b> automatically runs once a week.</li><li>■ View the most recent <b>Service Utilization and Billing Report</b>. <b>Note:</b> The <b>Service Utilization and Billing</b> report automatically runs once a month.</li><li>■ Activate a serial number. See <a href="#">“Activating a serial number”</a> on page 10.</li><li>■ Offline computers See <a href="#">“About viewing deployed products and offline computers”</a> on page 34.</li></ul>
<b>Product Deployment</b>	<p>Enables you to view your deployments for periods from <b>Last 3 months</b> down to the <b>Last 24 hours</b>.</p> <p>The <b>more</b> link takes you to the <b>Product Deployment</b> page where you can see more details and generate a report.</p> <p>See <a href="#">“About viewing deployed products and offline computers”</a> on page 34.</p>



Table 1-1 Widgets (continued)

Widget name	Description
<b>Virus and Risk Activity</b>	<p>Displays the viruses and other risks for the <b>Last 3 months</b> down to the <b>Last 24 hours</b>.</p> <p>The <b>more</b> link takes you to the <b>Endpoint Statistics</b> page. In this page you can see all the at risk computers and also generate a report. To see the details of an individual computer and perform specific tasks on it, click the <b>Manage</b> link next to the customer name. The customer management console opens where you click the computer of interest from the <b>Computers</b> page.</p> <p>See <a href="#">“Analyzing endpoint statistics”</a> on page 33.</p>
<b>Intrusion Prevention</b>	<p>Displays the intrusion events for the <b>Last 3 months</b> down to the <b>Last 24 hours</b>.</p> <p>The <b>more</b> link opens the <b>Endpoint Statistics</b> page. In this page you can see all the malicious activities and also generate a report. To see the details of an individual computer and perform specific tasks on it, click the <b>Manage</b> link next to the customer name. The customer management console opens where you click the computer of interest from the <b>Computers</b> page.</p> <p>See <a href="#">“Analyzing endpoint statistics”</a> on page 33.</p>
<b>Threats Summary</b>	<p>The ThreatCon portion of the widget displays the current threat level and a description of why the threat level is at the reported threat level. The latest global threats listing describes the threats with the severity level, name, type of threat and your protected status. Clicking a threat name takes you to the Symantec Security Response report on the threat.</p>
<b>News Alerts</b>	<p>Presents a snippet of the last two news items. The <b>more</b> link opens the <b>News Alerts</b> page. From this page, users may view all the news entries.</p>
<b>Endpoint Protection</b>	<p>Displays the summary of computers that are protected, disabled, activated, and require updates.</p> <p>The widget also displays the number of risks that are blocked, quarantined, and infectious items.</p>
<b>My Products</b>	<p>Displays the available products and the subscriptions that come with each product.</p>

# Activating a serial number

You can set up a Symantec Partner Management Console account and initiate trials for your customers. To take full advantage of the Partner Management Console, you must be part of the Symantec Enterprise Service Provider Licensing Program. When you are in the ExSP program, you activate your serial number one time and then provision your customers with products as needed. You are billed in arrears quarterly based on usage.

Resellers provision their customers using existing processes. While they cannot provision through the Partner Management Console, the console still gives them exceptional visibility into their customer-managed accounts. For partner-managed customers, the Partner Management Console enables them to log on to the customer's account from the console.

**Table 1-2** Partner Management Console features by partner type

Feature	Symantec Reseller	Symantec Reseller in the ExSP program
Setup customer (trial).	X	X
Setup customer (paid or subscription).		X
Monitor status of customer subscription or trial.	X	X
Convert customer trial to paid subscription.	X	X
Monitor status of customer services (once given permission).	X	X
Manage services on behalf of customer (once given permission).	X	X

## To enable provisioning within the Partner Management Console

- 1 From the **Home** page > **Quick Tasks** widget, click the **Activate a serial number** link.
- 2 In the **Activate Serial Number** modal, enter your ExSP serial number.  
Click **Validate**.  
Click **Activate**.
- 3 The validation and the activation processes confirm an ExSP partner account and enable customer provisioning from the customer's profile page.

See [“Home page widgets”](#) on page 6.

# Adding, importing, and managing your customers

This chapter includes the following topics:

- [Viewing your customer information](#)
- [Adding a new customer in the Partner Management Console](#)
- [Importing an existing customer into Partner Management Console](#)
- [Viewing a customer's profile](#)
- [Converting trials and adding paid services to an account](#)
- [Canceling a product trial or subscription](#)
- [Using the Communication Settings](#)
- [Management status in Partner Management Console](#)
- [Gaining access to your customer's Symantec Endpoint Protection Small Business Edition cloud account](#)
- [Managing your customer's Symantec Endpoint Protection Small Business Edition cloud account](#)

## Viewing your customer information

The **Customers** page enables you to:

- Add new customer.  
See [“Adding a new customer in the Partner Management Console”](#) on page 14.
- Import existing customer.

See [“Importing an existing customer into Partner Management Console”](#) on page 16.

- Filter and view your customer listing.
- View customer profile.  
See [“Viewing a customer's profile”](#) on page 16.

The customer listing displays all of your customers on a trial or using a product. The customer list may be searched by customer name using the **Search Customer** text box. You can sort by customer name or type in the listing, but more thorough filtering is available by using the filters on the left side. As your customer list grows and becomes unwieldy, the **Filters** section becomes increasingly useful. The filters are set to **All** in each category by default. However, you can filter your customer list using any or all of the categories to customize the view to your exact requirements. The filters let you view customers by:

- **Management Types**
- **Product Types**
- **Alerts**
- **Other - Require Update** - Lists the customers who have a computer that requires update with the latest version of the agent.

**Table 2-1** Customer listing

Column name	Definition
Customer	<p>Mousing over a customer name displays customer information. It also enables you to:</p> <ul style="list-style-type: none"> <li>■ View the customer profile.</li> <li>■ Activate a product or trial.</li> <li>■ Manage the customer's product.</li> <li>■ Deploy products to computers.</li> <li>■ Remove a customer.</li> </ul> <p>Clicking the customer name takes you to the <b>Customer Profile</b> page. See <a href="#">“Viewing a customer's profile”</a> on page 16.</p>
Type	<p>Displays the customer list by management type.</p> <ul style="list-style-type: none"> <li>■ Customer Managed</li> <li>■ Partner Managed</li> <li>■ Co-Managed</li> </ul> <p>See <a href="#">“Management status in Partner Management Console”</a> on page 22.</p>

**Table 2-1** Customer listing (*continued*)

Column name	Definition
Alerts	Identifies the customers with Critical or Warning+ alerts.
Products	Displays the customer's purchased products or product trials.
Require Update	Display the number of computers that requires the latest version of the agent to be updated.
Used/Capacity	Displays the use and capacity appropriate to the product type.

## Adding a new customer in the Partner Management Console

Before selling or providing a trial of the product, you must add your prospect to your Partner Management Console customer list.

During the creation of a new customer, you determine the best management type for the customer. You also decide if you or the customer manages the account emails. If you allow Symantec to send a welcome email and logon credentials directly to the customer, you still receive all of the account emails.

Controls are in place to comply with trade compliance regulations and to check for existing company accounts in the SEP SBE cloud database. Whenever there is a trade compliance concern, a customer service representative contacts you. When an email address already exists in the SEP SBE cloud database, you must contact customer service to add a trial to the existing account.

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**Note:** Please complete the add customer form as accurately as possible, avoiding the use of special characters. Incorrect or incomplete data may result in a manual review of your application and delay processing.

---

### To add a new customer

- 1 In the Partner Management Console, on the **Customers** page, click **Add New Customer**.
- 2 In the **Add Customer** page, in the **Management Type** section you specify whether you, the customer, or both of you manage the product. You must also decide if you or the customer manage product-related communications.

See [“Management status in Partner Management Console”](#) on page 22.

These roles are designated within the Partner Management Console as:

Who manages this customer's product?

Pick one response:

- **I will manage the products**  
This selection creates a **Partner Managed** account.
- **The customer will manage the products**  
This selection creates a **Customer Managed** account.
- **Both the customer and I will manage the products**  
This selection creates a **Co-Managed** account.

Do you want to manage all communications with this customer?

Pick one response:

- **Yes, I will manage all communications with this customer**  
With this selection the customer receives no emails from their account.
- **No, allow Symantec to send welcome email and login credentials directly to this customer**  
This selection allows the customer to receive account emails, including emails from Symantec.

3 Complete the **Company Information** section.

4 Complete the **Contact Information** section.

---

**Note:** The email address becomes your customer's login ID. This address cannot exist within the SEP SBE cloud database.

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5 Complete the **Activate a Product or Trial** section.

**Products** - Required

Select the requested product or service trials using the drop-down menu and click **Add** to add each product. Multiple products can be selected in this fashion.

Selected service display

This area displays the Products or Trials that you configured for your customer along with the duration of the license.

6 Click **Create Account** to create your new customer.

See ["Viewing your customer information"](#) on page 12.

See ["Importing an existing customer into Partner Management Console"](#) on page 16.

# Importing an existing customer into Partner Management Console

You can import an existing Symantec Endpoint Protection Small Business Edition (SEP SBE) cloud customer into your customer list. The only required information to send an import request to a customer is the email address that is attached to their SEP SBE cloud account. After the request is sent, the import request is tracked in the **Import Customer->Request Status** matrix.

If you want to import an existing customer with Mac, that customer must be given Mac access or all Macs from their account must be deleted.

You should have a business relationship with the customer because your import request is dependent upon their approval. If they approve your import request, you can manage their account and provide the customer with product trials at their request. You do not automatically take ownership of their existing account.

## To import an existing customer

- 1 In the Partner Management Console, on the **Customers** page, click the import existing customer arrow icon on top of the page.
- 2 In the **Import Customer** dialog box, type your customer's email address and click **Send**.

Your request is sent to the customer. As soon as the customer confirms the connection, the account is connected, and after a delay of several seconds is displayed in the **Request Status** table.

Table 2-2 Request Status

Column name	Description
Requested At	Displays the day, date, and time of your import request.
Email	Displays the email address of the existing customer.
Status	Displays the status of your import request.
Updated At	Displays the day, date, and time of the last update.

## Viewing a customer's profile

Clicking the name of any customer opens that customer's profile page.

The **Customer Profile** page gives you a considerable insight into your customer while also enabling a number of functions important to customer management. A number of components make up the customer profile:



- **Product Entitlement**
- **Customer Management**
- **Customer Information**
- **Endpoint Protection** summary
- **Endpoint Protection Deployments** chart

The **Activate a Product or Trial** option in the **Product Entitlement** area, converts a customer trial into a paid subscription or adds another paid subscription to an account. The **Product Entitlement** table displays the vital information about their product licenses.

**Note:** To activate a product, you must first enter your ExSP serial number or product serial numbers. This feature does not function for Symantec Resellers who are not in the ExSP program.

See [“Activating a serial number”](#) on page 10.

**Table 2-3** Product Entitlement

Column name	Description
<b>Serail Number</b>	Displays the customer's serial number.
<b>Type</b>	Displays the product license type.
<b>Used / Capacity</b>	Displays the total product capacity.
<b>Time Remaining</b>	Displays the time to expiration of trial or Auto-renew for purchased products.
<b>Action</b>	All subscriptions auto-renew until you click <b>Cancel Product</b> .

**Table 2-4** Customer Information

Section name	Description
<b>Management Status</b>	<p>This section displays the customer <b>Management Type</b> and identifies if the partner manages all of the communications with the customer or if communications with the customer are co-managed. The management types:</p> <ul style="list-style-type: none"> <li>■ Customer Managed</li> <li>■ Partner Managed</li> <li>■ Co-Managed</li> </ul>

**Table 2-4** Customer Information (*continued*)

Section name	Description
Who manages this customer's product?	<p>Pick one response:</p> <ul style="list-style-type: none"> <li>■ <b>I will manage the products</b> This selection creates a <b>Partner Managed</b> account.</li> <li>■ <b>The customer will manage the products</b> This selection creates a <b>Customer Managed</b> account.</li> <li>■ <b>Both the customer and I will manage the products</b> This selection creates a <b>Co-Managed</b> account.</li> </ul>
Do you want to manage all communications with this customer?	<p>Pick one response:</p> <ul style="list-style-type: none"> <li>■ <b>I will manage all communications with this customer</b> With this selection the customer receives no emails from their account.</li> <li>■ <b>Both the customer and I will manage communications</b> This selection allows the customer to receive account emails, including emails from Symantec.</li> </ul> <p>The management status of an account is changed by clicking <b>Update</b>. Clicking the option sends your management request to the customer.</p> <p>Once the customer confirms a management request, the management status changes to Partner Managed or Co-Managed.</p> <p>For the <b>Co-Managed</b> and <b>Partner Managed</b> types, the <b>Manage Customer</b> option enables you to log on to your customer's SEP SBE cloud management console.</p>
<b>Umanaged Mac</b>	Account administrators and partners can choose to allow or deny access to Mac computers.

**Table 2-5** Customer Information

Section name	Description
<b>Company Information</b>	This section displays name, address, and country.

**Table 2-5** Customer Information (*continued*)

Section name	Description
<b>Contact Information</b>	<p>This section displays:</p> <ul style="list-style-type: none"> <li>■ <b>Contact Name</b></li> <li>■ <b>Email Address</b></li> <li>■ <b>Phone Number</b></li> <li>■ <b>Language</b></li> <li>■ <b>Time Zone</b></li> <li>■ <b>Daylight Savings Time status</b></li> </ul> <p><b>Note:</b> This section cannot be edited.</p>
<b>Umanaged Mac</b>	Account administrators and partners can choose to allow or deny access to Mac computers.

**Table 2-6** Endpoint Protection service summary

Product summary item	Description
<b>Protected Endpoints</b>	Displays the number of customer computers running the Cloud Endpoint Protection Agent.
<b>Disabled Endpoints</b>	Displays the number of disabled Cloud Endpoint Protection Agents.
<b>Risks Blocked</b>	Displays the number of malcodes that were blocked for all customer computers using Endpoint Protection.
<b>Quarantined Items</b>	Displays the number of quarantined items across all customer computers running the Cloud Endpoint Protection Agent.
<b>Total Detections</b>	Displays the total number malcode detections across all customer computers running the Cloud Endpoint Protection Agent.
<b>Activation Required</b>	<p>Displays the number of customer computers whose service is not activated.</p> <p><a href="#">Troubleshooting agents in an unknown state</a></p>
<b>Agent Update Required</b>	Displays the number of customer computers running out-of-date Cloud Endpoint Protection Agents.
<b>Definition Update Required</b>	Displays the number of customer computers that require updated virus definitions.

**Table 2-7** Endpoint Protection Deployment chart

Chart feature	Description
Filter by	<p>The filter lets you graphically view your customer's endpoint protection deployments. You select the time frame to view using the drop-down:</p> <ul style="list-style-type: none"> <li>■ <b>Last 24 hours (default)</b></li> <li>■ <b>Last 7 days</b></li> <li>■ <b>Last 30 days</b></li> <li>■ <b>Last 3 months</b></li> </ul>

See [“Using the Communication Settings”](#) on page 21.

## Converting trials and adding paid services to an account

Symantec Endpoint Protection product trials are for 60 days and it comes with 50 seats.

When your customer is a self-managed customer, they can buy the product within the **Settings** page of their SEP SBE cloud management console. As an ExSP Symantec Reseller, you can activate products for customers from their **Customer Profile** page in the Partner Management Console. If you are not in the ExSP program, you fulfill the customer subscription using your existing processes.

See [“Activating a serial number”](#) on page 10.

### To convert a customer's product trial to a paid account

- 1 From the **Customers** page, click the customer name.
- 2 On the **Customer Profile** page in the **Product Entitlement** section, click **Activate a Product or Trail**.
- 3 In the **Activate a Product or Trial** modal, confirm that the correct customer is displayed in the **Customer** area. Then in the **Product** area, use the drop-down to select the product to activate as a paid subscription. Click **Add**.  
To activate more than one product, select and add the next product.
- 4 When you finish, click **Save**.

---

**Note:** This procedure works only for ExSP Symantec Resellers.

---

#### To add a product to an existing customer's account

- 1 From the **Customers** page, click the name of the existing customer to get a product added to their account.
- 2 On the **Customer Profile** page in the **Product Entitlement** section, click **Activate a Product or Trail**.
- 3 In the **Activate a Product or Trial** modal, confirm that the correct customer is displayed in the **Customer** area. Then in the **Product** area, use the drop-down to select the product to activate as a paid subscription. Click **Add**.  
To activate more than one product, select and add the next product.
- 4 When you finish, click **Save**.

---

**Note:** This procedure works only for ExSP Symantec Resellers.

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## Canceling a product trial or subscription

When a customer requests that a product trial or subscription be canceled, you can fulfill the request through the **Customer Profile** page.

#### To cancel a customer's trial or product subscription

- 1 From the **Customers** page, click the name of the existing customer to get a product added to their account.
- 2 On the **Customer Profile** page in the **Product Entitlement** section, locate the trial or the product subscription to be canceled.  
In the **Action** column, click **Cancel Product**.  
In the modal screen, click **Ok** to confirm the product cancellation.

## Using the Communication Settings

When you add a new customer, you configure the initial email communication settings for the account. Some customers may prefer not to receive these emails. You can change how email communications are handled at any time from the **Customer Profile** page.

**Table 2-8** Management Type - communication settings

Management Type - communications section	Effect
<b>I will manage all communications with this customer</b>	<p>This setting enables you to:</p> <ul style="list-style-type: none"> <li>■ Receive all communications from Symantec concerning the customer account.</li> <li>■ Receive all alerts from the customer's account.</li> </ul> <p>With this setting:</p> <ul style="list-style-type: none"> <li>■ The customer receives no email communications concerning the service or account unless you issue it.</li> <li>■ The customer cannot be emailed reports from their own account unless you forward the report to them.</li> </ul>
<b>Both the customer and I will manage communications</b>	<p>With this setting:</p> <ul style="list-style-type: none"> <li>■ Both you and your customer receive all communications concerning their account.</li> <li>■ Both you and your customer receive all of the alerts that are issued from the customer account.</li> <li>■ Both you and your customer can be emailed the reports that are generated from the customer's account.</li> </ul>

#### To change how communications are managed

- 1 From the **Customers** page, click the customer name.
- 2 On the **Customer Profile** page in the **Customer Information-Management Type** section, use the radio buttons to specify how communications with the customer are handled.
  - **I will manage all communications with this customer**
  - **Both the customer and I will manage communications** (default)
- 3 Click **Update** to change the **Communication Settings**.

See [“Management status in Partner Management Console”](#) on page 22.

## Management status in Partner Management Console

When a customer is self-managed, your visibility into the customer's account is limited to their use of the service. You can see:

- Product entitlement information for each of their services or trials

- Product deployment information
- Information showing the function or performance of each product

What you cannot do is logon to your customer's account.

Management status is initially configured when you add a new customer. The new customer form configures a customer's management type based on your answer to the question:

■ **Who manages this customer's product?**

Your response creates one of these management types:

- Customer managed account.
- Partner managed account.
- Co-managed account

---

**Note:** The **Partner Managed** management type designation enables you to log on to your customer's account from the Partner Management Console. The **Partner Managed** management status also prevents the customer from logging on to their own account.

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Whenever you migrate a **Customer Managed** account to **Partner Managed** status, Symantec requires that your customer explicitly authorizes your access to their account.

See [“Gaining access to your customer's Symantec Endpoint Protection Small Business Edition cloud account”](#) on page 23.

See [“Managing your customer's Symantec Endpoint Protection Small Business Edition cloud account”](#) on page 24.

## Gaining access to your customer's Symantec Endpoint Protection Small Business Edition cloud account

When your agreement with a customer requires that you set up, configure, and manage their account, you must have access to their SEP SBE cloud account. If you did not initially create the customer's account as a managed customer, you can change that from the customer's **Customer Profile** page. To gain access to a customer's account requires the explicit authorization of the customer.

### To manage an existing, self-managed customer

- 1 From the **Customers** page, click the customer name.
- 2 On the **Customer Profile** page in the **Management Status** section, make the selections and click **Update** to send an official request to the registered customer email to manage their account.

The customer must explicitly authorize your request by following the instructions in the request email.

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**Note:** As a best practice, inform your customer that they will receive an email requiring their explicit authorization letting you manage their account.

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## Managing your customer's Symantec Endpoint Protection Small Business Edition cloud account

From the Partner Management Console you can manage any of your partner-managed customer's policy settings, computers, group settings, and create new installation packages as well any other functions regularly accessed in Symantec Endpoint Protection cloud console.

Because you are logged on to your customer's SEP SBE cloud account with full administrative privilege, you must be authorized in advance.

See [“Gaining access to your customer's Symantec Endpoint Protection Small Business Edition cloud account”](#) on page 23.

### To manage your customer's products

- 1 In the Partner Management Console, on the **Customers** page, click the customer name.
- 2 On the **Customer Profile** page in the **Management Status** section, click **Manage Customer**.

The **Manage Customer** feature automatically logs you in to your customer's SEP SBE cloud account in a new browser tab or window. You are logged on with full administrative rights.

- 3 To end your customer management session, click **Logout** and close the browser window or tab.



# Configuring, running, and scheduling reports

This chapter includes the following topics:

- [Using Partner Management Console Reports](#)
- [Report types in the Partner Management Console](#)
- [Configuring a new report in the Partner Management Console](#)
- [Using report templates](#)
- [Scheduling reports in the Partner Management Console](#)

## Using Partner Management Console Reports

You create Partner Management Console reports using the report wizard. The reports that you create are listed in the **Reports** page. The **Reports** page opens to three tabs:

- **Reports**  
See [“Configuring a new report in the Partner Management Console”](#) on page 28.
- **Report Templates**  
See [“Using report templates”](#) on page 30.
- **Scheduled Reports**  
See [“Scheduling reports in the Partner Management Console”](#) on page 31.

You can create as many reports as you want, save the most useful as templates, and then schedule the templates. Your finished reports appear in the **Reports** page.

Your reports can be customized with your company logo and colors by clicking the **Report Customization** link.

Report customization is available for SEP SBE only.

See [“Customizing your reports in the Partner Management Console”](#) on page 40.

**Table 3-1** Reports listing

Column name	Description
Check box	Activate the check box to select reports for deletion, then click <b>Delete</b> .
Status	Shows the progress status until a report is ready for download. You can click <b>download</b> to save the report locally.
Report Name	The name that you assigned to the report. Clicking the name opens the report in a new browser window.
Format	All reports are rendered in the Adobe PDF and HTML formats. Some reports can be rendered in CSV and XML formats too.
Report Type	Identifies the report type. See <a href="#">“Report types in the Partner Management Console”</a> on page 26.
Requested Date	Displays the date and time of the report submission.

## Report types in the Partner Management Console

The Partner Management Console provides several report types. You create these reports using the **Report Wizard**.

See [“Configuring a new report in the Partner Management Console”](#) on page 28.

### Customer Executive Summary

Displays the health of a customer network, service utilization, risk detections, computers at risk, and other indications of network health.

### **MSP Executive Summary**

Provides a thorough summary of customer activity. The report includes:

- Service utilization
- Customer and service growth trends
- New subscriptions, users, and capacity added
- Details of threats or risks

**Note:** The **MSP Executive Summary** report automatically runs once a week.

### **Service Utilization and Billing**

Gives a summary of the overall usage of services across all customers in your account. It also provides a breakdown of product utilization by customer. This report can be leveraged for customer billing.

**Note:** The Service Utilization and Billing report automatically runs once a month.

### **Endpoint Summary**

Provides a summary of the distribution, characteristics, and current health of all devices belonging to the selected customers. You have the option to list only the active computers. Active computers list does not include the computers that have been deleted.

### **Product Deployment Summary**

Provides the total number of products that are deployed for the selected customers. You have the option to list only the active computers. Active computers list does not include the computers that have been deleted.

### **Virus and Risk Activity Summary**

Provides the number of computers that have high risk incidents for the selected customers. You have the option to list only the active computers. Active computers list does not include the computers that have been deleted.

<b>Intrusion Prevention Summary</b>	Provides the number of computers where the malicious activities are detected and prevented for the selected customers. You have the option to list only the active computers. Active computers list does not include the computers that have been deleted.
<b>Mac Computer Summary</b>	Provides a summary of unmanaged Mac computers belonging to the selected customer.
<b>Computer Status Summary</b>	Provides a summary of the overall status for all computers.
<b>Alert History</b>	Shows the history of alerts and events that have occurred.
<b>Security Audit</b>	Shows the access activity for the account. The audit includes logons, jobs run, and modifications made.
<b>Firewall History</b>	Provides a summary of firewall events.
<b>Risk Detection</b>	Provides the details about the types of risks detected, the actions taken, and any unresolved risks on all devices belonging to the selected customer.
<b>Security Overview</b>	Provides a distribution of security risks by attack surfaces across all devices belonging to the selected customer.

## Configuring a new report in the Partner Management Console

The Partner Management Console provides several report types. You create these reports using the **Report Wizard**.

The **Add** option in the **Reports** page opens the wizard and begins the steps of report creation.

- **Report Selection**
- **Data Selection**
- **Format Selection**

- **Delivery**
- **Confirmation**

A green checkmark appears at the top of the wizard for each completed step.

In the **Format Selection** step you can save your report configuration as a template. This option makes it possible to schedule the reports that you consider essential to your operations.

#### To configure a new report

- 1 From the **Reports** page > **Reports** tab, click **Add**.
- 2 In the **Report Selection** step, give your report a name and select your **Report Type** using the drop-down. Click **Next**.
- 3 In the **Data Selection** step, you must:

- Specify a time period for the report to cover.
- Select at least one customer.

Depending on the report type you are presented with the following:

- **All Computers** - Includes all computers
- **Active computers only** - Excludes computers that have been deleted.
- **Mac computers** - Includes unmanaged Mac computers.
- **Report By** - Computers or Groups
- **Active users only** - Excludes users who are suspended.

Click **Next**.

- 4 In the **Format Selection** step, select the format for the report.

You can also save your report configuration as a template for later use. Reports that are saved as a template are listed on the **Reports Template** tab of the **Reports** page.

- 5 In the **Delivery** step, you select the email addresses of people who need to see the report. However, unless you activate the **Email the report as an attached file** check-box, the recipient must have a logon account to the Partner Management Console to view the report.

---

**Note:** Always activate the **Email the report as an attached file** check-box when the report is intended for one of your customers.

---

Reports may always be viewed and downloaded for use from your Partner Management Console, specifying email recipients is an option.

Click **Next**.

- 6 In the **Confirmation** step, you review your report configuration.

When you are satisfied with the configuration, click **Generate Report**.

Your report is then listed on the **Reports** page with a **Status of Processing**.

See [“Using report templates”](#) on page 30.

## Using report templates

The **Report Templates** tab displays a listing of the templates available for schedule creation. You create templates when you configure a report.

See [“To configure a new report”](#) on page 29.

Any listed template may be scheduled to run regularly or as required.

**Table 3-2** Report templates list

Column name	Description
Check box	Activate the check box to select reports for deletion, then click <b>Delete</b> .
Actions	The <b>Generate Report</b> action runs the report again using the template configuration.
Report Template	Displays the report name as the template name. Clicking the template name opens the <b>Report Wizard</b> in <b>Update Template</b> mode.
Report Type	Identifies the report type.  See <a href="#">“Report types in the Partner Management Console”</a> on page 26.
Format	Depending on the report type, reports are rendered in the Adobe PDF, CSV, HTML, or XML formats.

Table 3-2 Report templates list (*continued*)

Column name	Description
Generated Date	Displays the date and time of the initial report generation.

See [“Scheduling reports in the Partner Management Console”](#) on page 31.

## Scheduling reports in the Partner Management Console

Any report template can be set up to run on a schedule by clicking **Add**. You may set up as many scheduled reports as you need.

Table 3-3 Scheduled reports

Column name	Description
Check box	Activate the check box to select reports for deletion, then click <b>Delete</b> .
Schedule Name	The name of a configured schedule opens a modal to edit the schedule.
Report Template	Displays the report template that is used to run on a schedule.
Format	Depending on the report type, reports are rendered in the Adobe PDF, CSV, HTML, or XML formats.
Schedule	Displays the time that the scheduled report runs.

### To schedule a template

- 1 From the **Reports** page and **Scheduled Reports** tab, click **Add**.
- 2 In the **Add Report Schedule** modal, give the schedule a name.
- 3 Use the **Report Template** drop-down menu to select the template to schedule.  
Use the **How Often** drop-down menu to schedule the report to run **Daily**, **Weekly**, **Monthly**, or **Quarterly**.  
Use the **Starting at** drop-down menu to set the GMT time that the report runs.

See [“Using report templates”](#) on page 30.

# Using widgets on the Home page

This chapter includes the following topics:

- [Viewing your alerts](#)
- [Analyzing endpoint statistics](#)
- [About viewing deployed products and offline computers](#)

## Viewing your alerts

The **Alerts** page has three parts:

- The alerts listing
- The viewing pane
- The filters

The alerts listing lets you quickly scan the most recently delivered alerts.

Click the settings icon on the top-right of the page to create alert notification rules.

See “[Customizing your alert notifications](#)” on page 39.

**Table 4-1** Alerts listing

Column name	Description
Check box	Activate the check boxes to mark alerts for removal. You click <b>Dismiss Alerts</b> to remove the selected alerts.



Table 4-1 Alerts listing (*continued*)

Column name	Description
<b>Severity</b>	This <b>Severity</b> column enables you to sort alerts by severity. <ul style="list-style-type: none"><li>■ Error-&gt; Red</li><li>■ Warning-&gt; Yellow</li><li>■ Informational-&gt; Green</li></ul>
<b>Delivered to</b>	This <b>Delivered to</b> column enables you to sort and view alerts by customer.
<b>Subject</b>	The <b>Subject</b> column lets you sort by email subject lines.
<b>Date and Time</b>	This sortable column displays alerts by the date and the time of delivery.

Clicking on an alert, displays the alert in the viewing pane.

As the number of alerts in your Partner Management Console account increases, the filters become increasingly valuable. The **Filters** area provides filtering by any or all of the available filters.

- **Customer** drop-down
- **User**
- **Computer**
- **Alert type**
- **Date Range**
- **Severity**
- **Status**

Use the list view icon that is displayed above the alert listing to show the current list of alerts in a table. You can then copy and paste the content to other applications like Microsoft Excel or Word.

## Analyzing endpoint statistics

Whenever you see interesting activity in your **Home** page widgets you can dig deeper into the activity using that widget's **more** link.

The filters in the **Endpoint Statistics** page enable the administrator to dig into the following:

- The **Risk Detections** section provides a summary of the top risks detected. Charts and graphs enable an administrator to determine if the risk is isolated or spreading throughout their network.
- The **Intrusion Detection** section provides a summary of all the malicious activities detected.

---

**Note:** Sometimes there may be a delay in the latest customer information from being displayed due to the timing of the data synchronization.

---

You can generate a PDF report from this page.

You can click the **Manage** link next to the partner-managed customer name to open the customer management console. In the customer management console, select the **Computers** page to perform many activities on the incidents.

See [“Home page widgets”](#) on page 6.

## About viewing deployed products and offline computers

The **more** link in the **Product Deployment** widget on the **Home** page opens the **Product Deployment** page. The **Product Deployment** page enables the administrator to dig into:

- **Products deployed**  
Here you can view the total number of products that are deployed and also the number of products that are deployed during a selected date range for all your customers. You can also generate a PDF report.
- **Offline computers**  
Here you can view the number of computers that have been offline for a selected date range and generate a report.  
You can also click the **Manage** link next to the customer name to open the customer management console. In the customer management console > **Computers** page, you can move the offline computers to a group and then delete the group. If licenses were applied on any of these offline computers they can be reclaimed and used for the computers that may need them.  
The **Manage** link appears only next to the customer name that is managed or co-managed by the partner.

[Viewing and deleting the computers that are offline](#)

See [“Home page widgets”](#) on page 6.

# Customizing Partner Management Console administration

This chapter includes the following topics:

- [Administration page](#)
- [Creating a user](#)
- [Changing user profile settings and adding contact preferences](#)
- [User roles](#)
- [Adding a role](#)
- [Assigning users and customer access level to a role](#)
- [Customizing your alert notifications](#)
- [Customizing your reports in the Partner Management Console](#)
- [Viewing My Company information](#)

## Administration page

You can configure the following settings from the Administration page:

- Manage users.  
See [“Creating a user”](#) on page 36.  
See [“Changing user profile settings and adding contact preferences”](#) on page 36.
- Manage Roles.

See [“User roles”](#) on page 37.

See [“Adding a role”](#) on page 38.

See [“Assigning users and customer access level to a role”](#) on page 39.

- Manage alerts.  
See [“Customizing your alert notifications”](#) on page 39.
- Customize reports.  
See [“Customizing your reports in the Partner Management Console”](#) on page 40.
- View company information.  
See [“Viewing My Company information”](#) on page 41.
- My Products page displays usage of trials and subscriptions.
- Unmanaged Mac.
- Language setting  
You can change the primary language from here.

## Creating a user

The **Users** page displays the people who are authorized to use the Partner Management Console account.

### To add a user to your account

- 1 From any page, click **Administration**.  
By default, you land on the **Users** page.  
Click **Add User**.
- 2 Complete the **Add User** form.

---

**Note:** The email address must not already exist in the system database.

---

- 3 Click **Save**.

See [“Changing user profile settings and adding contact preferences”](#) on page 36.

## Changing user profile settings and adding contact preferences

Users can modify user profile and add preferred contact method as the need arises.

**To modify your profile**

- 1 In the Partner Management Console banner, mouse-over your account name. From the drop-down menu, click **My User Settings**.  
Alternately from **Administration > Users** page, click the user name link.
- 2 Modify your profile as necessary.
- 3 Click **Save** to keep your changes.

**To add a contact preference to a profile**

- 1 From **Administration > Users** page, click the user name link.
- 2 In the **Settings** section, click **Contact Preferences**.
- 3 Click **Add Contact**.
- 4 In the **Add Contact** modal, use the **Type** drop-down to select **Email** or **SMS**.
- 5 Enter an email address or an SMS number for the contact preference in the **Address** box.
- 6 Activate the **Primary Contact** check box if this entry is the preferred contact method.
- 7 Click **Save** when finished.
- 8 The new contact method appears in the **Contact Preference** listing with an option to edit or delete the entry.

## User roles

Partners can manage which users have how much access on their customer's accounts. Two predefined roles are provided: partner administrator and administrator. Only partner administrators can create and edit custom roles, and assign roles to users.

User who creates the PMC account is assigned the partner administrator role.

A partner administrator cannot modify their role but another partner administrator can edit the role. As a best practice, we recommend creating a second partner administrator to ensure management continuity.

Table 5-1 User roles

Role name	Create, edit, and assign roles.	Customer access level
Partner Administrator +(non-editable)	Yes	Read/Write access for all existing customers and new customers.
Administrator (non-editable)	No	Read/ Write access for all existing customers and new customers.
<i>custom role</i>	No	Customizable customer access.

Table 5-2 Customer access levels

Customer access level	Privileges
Read/Write	Full access to create and manage customer accounts. Unified access and management of customers using the SEP SBE management console.
Read	Access to only view customer information in Partner Management Console.
No access	No access to customer information, alerts, and customer-related reports.

See [“Adding a role”](#) on page 38.

See [“Assigning users and customer access level to a role”](#) on page 39.

## Adding a role

Only partner administrators can add a custom role.

See [“User roles”](#) on page 37.

### To create a role

- 1 From any page, click **Administration**.  
Click **User Roles** in the **Settings** section.
- 2 Type the role name and click **Add Role**.

See [“Assigning users and customer access level to a role”](#) on page 39.

## Assigning users and customer access level to a role

Only partner administrators can assign users and customer access level to a role.

See “[User roles](#)” on page 37.

### To assign users and customer access level

- 1 From any page, click **Administration** and then **User Roles** in the **Settings** section.
- 2 Click the role name.
- 3 In the **Users** section, select the user from the drop-down, and then click **Add User**.
- 4 In the **Customer Access** section, assign the customers under the applicable access levels.

The default access level for new customers is disabled if **All Customers** is checked for any of the access levels.

By default, all customers are given the read and write access.

- 5 In the **Settings** section, specify the permission to add, import, or remove customers.

The setting to remove customers is disabled, if in the **Customer Access** section, **All Customers** is checked for **Read Access**.

The settings to add, import, or remove customers are disabled, if in the **Customer Access** section, **All Customers** is checked for **No Access**.

- 6 Click **Save**.

## Customizing your alert notifications

The **Administration > Alert Notifications** page lists all of the alerting rules. These rules enable you to set up notifications for:

- Different categories of alerts by service and by severity
- All or selected companies
- All computers, selected computers, or groups of computers
- All or selected users

Each of the notification rules can be enabled or disabled from the **Administration > Alerts Notifications** page.

Table 5-3 Alert Notification Rules

Column name	Description
<b>Alert Notification Rule</b>	Displays the name of the rule and a link to the rule configuration.
<b>Status</b>	Displays if the rule is enabled or disabled. The rule can be toggled between enabled which is green or disabled which is red.
<b>Recipient Count</b>	Displays the number of users receiving notifications based on the rule or all administrators.
<b>Action</b>	Enables you to delete a rule.

**To create an alert notification rule**

- 1 From any page, click **Administration** and then **Alert Notifications** in the **Settings** section.
- 2 Click **Add Notification**.  
In the **Add Notification** modal, in the **Rule Name/Categories** section, give the rule a name. Then configure the appropriate categories using the check boxes.
- 3 In the **Companies** section, identify the companies to which the rule applies.
- 4 In the **Computers or Groups** section, use the radio buttons to select if the rule applies to all computers, selected computers, or selected groups.
- 5 In the **Recipients** section, you specify which users receive the alerts when triggered.
- 6 In the **Confirmation** section, review your alerting rule.  
When you finish, click **Save**.

## Customizing your reports in the Partner Management Console

You can customize the look and feel of your Partner Management Console reports to reflect the brand of your organization. You can customize the following:

- Change the color of the header font.
- Change the color of the report theme.
- Include a logo in the report banner.



**To change the appearance of your reports**

- 1 From any page, click **Administration** and then click **Report Customization**.
- 2 Click the **Header Font** or **Report Theme** color box to change color of the report header and-or typeface.

You can click and move the circle in the color box.

Move the vertical slider on the color bar.

Or type in RGB values to change the report theme color.
- 3 Click **Browse** to change logo in the report header.

You can upload PNG, JPG, JPEG, and GIF files for the logo.

The file size must be less than 200 KB.

If the image is larger than 116x110 pixels it is scaled to fit.
- 4 Click **Open** when you locate your logo file.

Your customized report is visible in the **Preview** pane.
- 5 Click **Save** when you are finished customizing your reports.

## Viewing My Company information

Your **My Company** settings enable you to view your listed company name and address in the **Company Information** area. This information cannot be edited.

The information that you provide to customers in email communications and within their SEP SBE cloud services can be edited. You may provide URLs to your company website and to your support organization along with an email address and telephone number.

**To set up the contact and the support information used in email communications and customer services**

- 1 From any page, click **Administration** and then click **My Company** in the **Settings** section.
- 2 Review your company information. Information in the **Company Information** area cannot be edited.
- 3 In the **Contact and Support Information** section, you can:
  - Enter a URL for your customers to purchase services.
  - Enter a URL to your organization's Support website.
  - Enter an email address for support.

- Enter a phone number for Support.

This information appears in email communications to your customer and within their SEP SBE cloud management console's **Settings** page.

# Getting help and other resources

This chapter includes the following topics:

- [Signing up for the Partner Management Console](#)
- [Using the question mark](#)
- [Sending us your feedback](#)
- [Submitting support tickets to Symantec](#)
- [Using the Support ticket listing](#)
- [Contacting Support](#)

## Signing up for the Partner Management Console

The Partner Management Console is designed to make it easier for you to sell and manage Symantec Endpoint Protection Small Business Edition product and to service your customers. The web-based console is available to all reseller partners. However, the Symantec Enterprise Service Provider (ExSP) program is integrated with the Partner Management Console. The program enables ExSP partners to take advantage of "pay as you go" provisioning and billing within the console. But all reseller partners can use the Partner Management Console; membership in the ExSP program is optional.

No special certifications or programs are required to use the Partner Management Console. You can register for an account at <https://manage.symanteccloud.com>. You also log in at that URL.

### To open a Partner Management Console account

- 1 Open a browser and go to: <https://manage.symanteccloud.com>. Click **Sign Up**.
- 2 Complete **Partner Signup** page form. It asks for:
  - **Login Information**
  - **Company Information**
  - **Contact Information**
- 3 Submit the form by:
  - Entering the **Validation** characters
  - Agreeing to the **Terms and Conditions**
  - Clicking **Create Account**

## Using the question mark

The question mark icon in the navigation bar is a hover-over menu giving access to:

**Learn more about this page** Opens the online Help topic for the console page you are on.

**Support** Opens the Support page for contact options, helpful troubleshooting articles, and other support resources.

**FAQ** Opens the FAQ Help topic that lists the questions that are related to Partner Management Console.

**Welcome Wizard** Reopens the Welcome Wizard interface to help you set up your Partner Management Console account.

**CMES** Opens the SEP SBE cloud online Help. FAQ Help topic, and links to PDF guides.

**Feedback** Opens a page enabling you to provide feedback as a customer of the Partner Management Console.

**Symantec PartnerNet** Links to Symantec PartnerNet.

Two PDF guides are available for the Partner Management Console:

- [Getting Started Guide](#)
- [Administrator's Guide](#)

## Sending us your feedback

The Symantec Partner Management Console provides an easy way to send feedback to the product managers of the Partner Management Console and the Symantec Endpoint Protection Small Business Edition cloud.

### To send your feedback

- 1 From any page, mouse over the question mark icon, and click **Feedback**.
- 2 In the **Feedback** modal, use the **Comments** drop-down to categorize your feedback.

Enter your comments in the text box.

- 3 Use the **Page Rating** section to give us feedback for:

- **Content**
- **Design**
- **Usability**
- **Overall**
- **Ease of use**

The ratings use one to five scales, where one is unsatisfactory, and five is excellent.

- 4 Use the drop-down to answer the question: **Would you recommend this service to a colleague?**
- 5 When you finish, click **Submit**.

## Submitting support tickets to Symantec

The **Case Management** page enables you to open and track support tickets on behalf of your customers and yourself.

### To open a support ticket

- 1 In the Partner Management Console banner, mouse-over your account name, and click **Case Management**.
- 2 In the **Actions** section, click **Create Support Ticket**.
- 3 In the **Create Support Ticket** modal, in the **Subject** text box, provide a useful title for the support case.

- 4 In the **Description** text box, provide enough detail to direct the matter to the support personnel best qualified to resolve the matter.

- 5 Use **Browse**.

When you have finished, click **Submit**.

See [“Using the Support ticket listing”](#) on page 46.

## Using the Support ticket listing

The **Case Management** page lists your support ticket cases, which you can track, filter, and manage. Your support cases can be filtered for periods ranging from the last week to the last 3 months.

Table 6-1 Support ticket listing

Column name	Description
<b>Case number</b>	Displays the case number. The case number opens the Support Ticket Detail page.
<b>Subject</b>	The subject is the subject line that you entered when opening the support case.
<b>Severity</b>	Support personnel adjust the severity level of your case after they evaluate the issue. The severity level may be adjusted several times in the course of a support case.
<b>Product</b>	The product for which the support case exists.
<b>Status</b>	The status changes through the lifecycle of the support case until it is closed.
<b>Date/Time Opened</b>	The date and time of the support case submission.

### To view the details of a support case

- 1 In the Partner Management Console banner, mouse-over your account name, and click **Case Management**.
- 2 In the **Case Management** page, locate a case of interest and click the case number link.

- 3 In the **Support Ticket Detail** modal, there are three sections to provide interaction between you and Symantec support.

<b>Description Information</b>	The information that you provided to describe your support case. You may update the <b>Subject</b> line and <b>Description</b> .
<b>Attachments</b>	Lists the attachments that are included with the support case.
<b>Case Comments</b>	This area cannot be edited. It contains all of the <b>Case Resolution</b> comments. It is where you find suggestions and questions from the support personnel working your case.

- 4 The following options that let you close or modify your case:

- **Close Ticket**
- **Add Comments**
- **Add Attachments**

- 5 When you click **Close Ticket**, please enter information about the solution in the **Case Resolution** modal.

See [“Submitting support tickets to Symantec”](#) on page 45.

## Contacting Support

For contact options, helpful troubleshooting articles, and other support resources, [click here](#).