Managed DNS RWI 2 User Guide

July 28, 2008

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Revisions and Updates

July 28, 2008

- Rebranded guide, changing ‘Tucows’ to ‘OpenSRS’.

August 25, 2007

- The Managed DNS service is now free. To reflect this change, the "Payments and Billing" section has been removed. Although the Price field still appears in some interface tables, the value will always be $0.00.

September 12, 2006

- Added section “Transferring the Managed DNS Service” which explains how to easily transfer any Tucows services except Email Defense (Digital Certificates, DNS, Email, and Website Builder) from one Tucows Reseller to another.

August 22, 2006

- Incremented document version number to 2.9.6.
- Added section "Creating RWI 2 Users" with information on usernames in local namespaces, which enables the use of duplicate usernames.

December 15, 2005

- Incremented document version number to 2.9.4.
- Added section "Exceptions to Real-Time Processing", which addresses the management of asynchronously processed items. This functionality is available on the Horizon system on December 8, 2005, and will be live on December 15, 2005.

December 9, 2004

- Added the {{zone}} placeholder for use in the default zone template.
- Expanded the DNS functionality to include TXT records. As a result, the following sections have been modified:
  - Setting Your Zone Template
  - Managing Zone Information
- Incremented document version number to 2.8.7.

October 5, 2004

- The monthly billing functionality has been enhanced to allow an expiration date to be set for each service. As a result of this enhancement, the following sections have been modified or added:
  - Cancelling, Suspending, and Reactivating the Managed DNS Service
  - Updating DNS Renewal and Expiration Settings

    - Searching for services sold that are approaching expiry
    - Monthly billing messaging
- Incremented document version number to 2.8.6.

July 20, 2004

- Added section Changing the Default Order Processing Setting, which determines how orders will be processed if using the RWI or TPP API.
- Incremented document version number to 2.8.5.

Introduction

The Managed DNS service is enabled per domain, and it allows Resellers to create DNS zones for their customers, change the settings of existing zones, and create a default template upon which to base new zones.

In the Reseller Web Interface (RWI), DNS is referred to as the service category, which provisions the Managed DNS service.

API and Reseller Client Library

This document addresses ordering and managing DNS zones using the RWI. You can also order and manage DNS zones using the DNS API, and manage zones using the Reseller Client Library. For more information regarding these options, please visit the Reseller Resource Center or contact Customer Support at reseller.support@opensrs.com.

Nameservers for DNS

For the Managed DNS service to work, your customers must update their domain's nameservers with the Registrar. The Managed DNS nameservers are:

- ns1.mdnsservice.com
- ns2.mdnsservice.com
- ns3.mdnsservice.com

DNS Service Public Manage Interface

Your customers can manage the DNS settings for their domains using the DNS Public Manage Interface (PMI). Permissions to manage their DNS can be turned off in the RWI for an individual domain, or can be set as a Reseller default. Your customers can access the interface using their username and password. This is the same username and password that is used when creating the Managed DNS Service order, so be sure to create a customer-specific username if you want to allow your customers to use the PMI. See also "Creating RWI 2 Users".

The PMI interface is available at:

https://*brand*.managednsservice.com

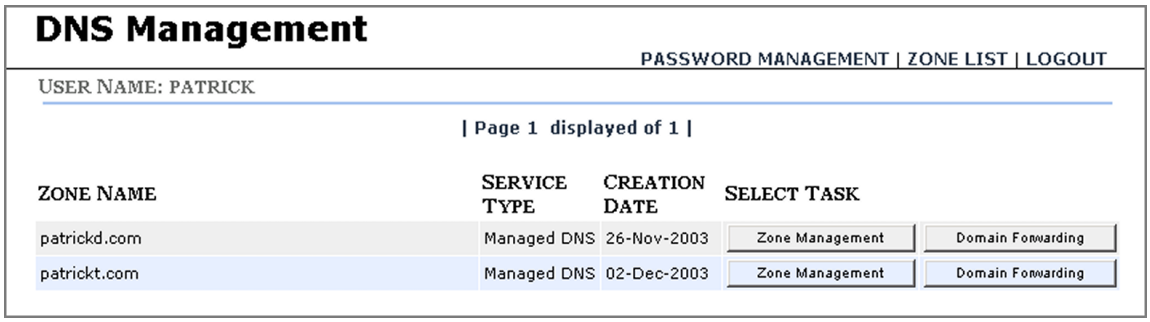
where *brand* identifies the local namespace to which the user belongs.

For more information, see "Impact:servicecontrolpanel.com and managedmsservice.com".

The DNS PMI is also available on HORIZON for Resellers to test and view the functionality. The interface is available at:

https://*brand*.resellers2-test.opensrs.net/dns/

The Public Manage Interface for DNS



To retrieve a forgotten PMI password

1. In the PMI login page, click **Click here**.

   The **Password Recovery** page opens.

2. In the **Username** field, enter the user's login name, and click the **Send Password** button.
   That user's password is sent to the primary contact for that user.

Terms and Definitions

DNS (Domain Name System)

DNS translates a domain name from an alphanumeric string (for example, yourdomain.com) into a numerical IP address (for example, 12.23.45.67).

Zone

The zone is the set of DNS records used to control how your domain works, and to determine your domain and host IP addresses.

Record

Records are the elements that define the zone. A zone can include A, CNAME, NS, MX and TXT records. See definitions below.

Hostnames (A records)

Provide the IP address of the domain.

Aliases (CNAME records)

An alias can be used when you want to delegate a subdomain to another nameserver.

Subdomain Delegations (NS records)

Domain nameservers hold information about how to reach the domain name. NS records delegate authority for subdomains that are not on the Managed DNS nameservers to alternate nameservers. For example, if the zone information for office2.example.com is hosted on another nameserver (for example, ns1.othernameserver.com), the zone for example.com needs to include an NS record to delegate authority to the other nameserver.

Mail Exchanges (MX records)

MX records are used to have mail delivered to your domain. Each mail exchange has two pieces of information associated with it: the hostname of the mail server, and a preference number. If there are multiple mail exchanges, the mail server sending to your domain selects one based on the preference level, starting with the lowest number and working its way up.

TXT Records

TXT records are used to associate your comments to a hostname.

FQDN (Fully Qualified Domain Name)

A standard domain plus a hostname, ending with a period, such as, WWW.EXAMPLE.COM. or DNS1.EXAMPLE.COM.

Subdomain

A subdomain is a domain name that is part of a larger domain. For example, RESELLERS.OPENSRS.COM is a subdomain of OPENSRS.COM.

Domain Name Levels

Domain names are divided into levels, starting from the end of the domain and working left. The first level is also known as the Top Level Domain (TLD) element of the domain name, that is, .COM, .NET, or .INFO. For example, the domain ABC.EXAMPLE.COM can be broken down into the following levels:

ABC	EXAMPLE	COM
3rd level	2nd level	1st level

Purchasing Concepts

RWI 2 Services

The Reseller Web Interface 2 (RWI 2) provisions the Digital Certificate, Email, Email Defense, Website Builder, and DNS services. It does not provision domains; domains are provisioned using the OpenSRS RWI. For information about OpenSRS, see http://opensrs.com/site/resources/documentation/controlpanels.

The RWI 2, and the steps involved in purchasing or enabling RWI 2 services, differ considerably from the process of purchasing domains.

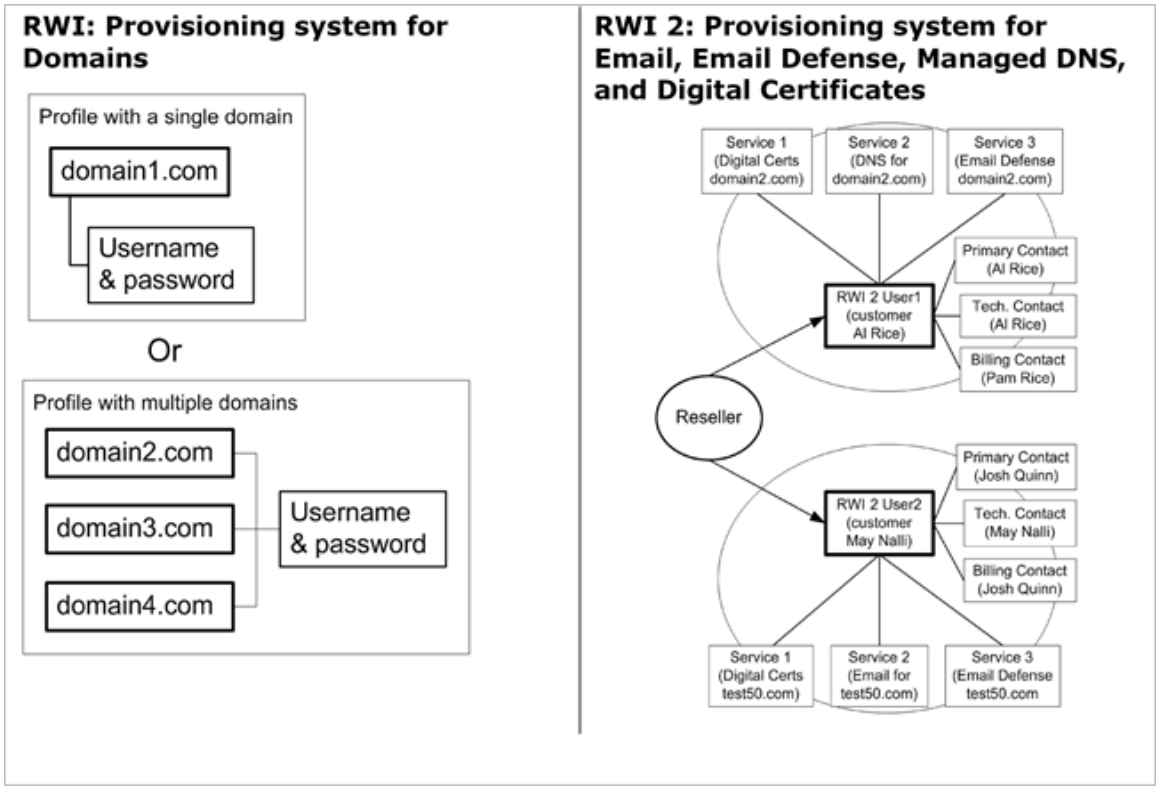
Before using the RWI 2, you should become familiar with the following concepts: RWI 2 user, orders, order items, and services sold.

RWI 2 User

All transactions and order-management activities for RWI 2 services (Email, Email Defense, Digital Certificates, Website Builder, and Managed DNS) center around a user. This user profile is not the same as your Reseller account information. It is required in addition to your Reseller account, and is specified after you log in to the RWI 2.

System structure for provisioning domains (RWI) vs. provisioning of RWI 2 services

The domain-provisioning system is organized according to each domain. To manage a domain, you must search for it using its name and supply the username and password for managing that domain.



The provisioning of the Email Service, Digital Certificates, and Managed DNS services is completely separate from the provisioning and managing of domain registrations. As such, information regarding the products you have purchased is not shared between the two systems.

Organizing your Orders and Users

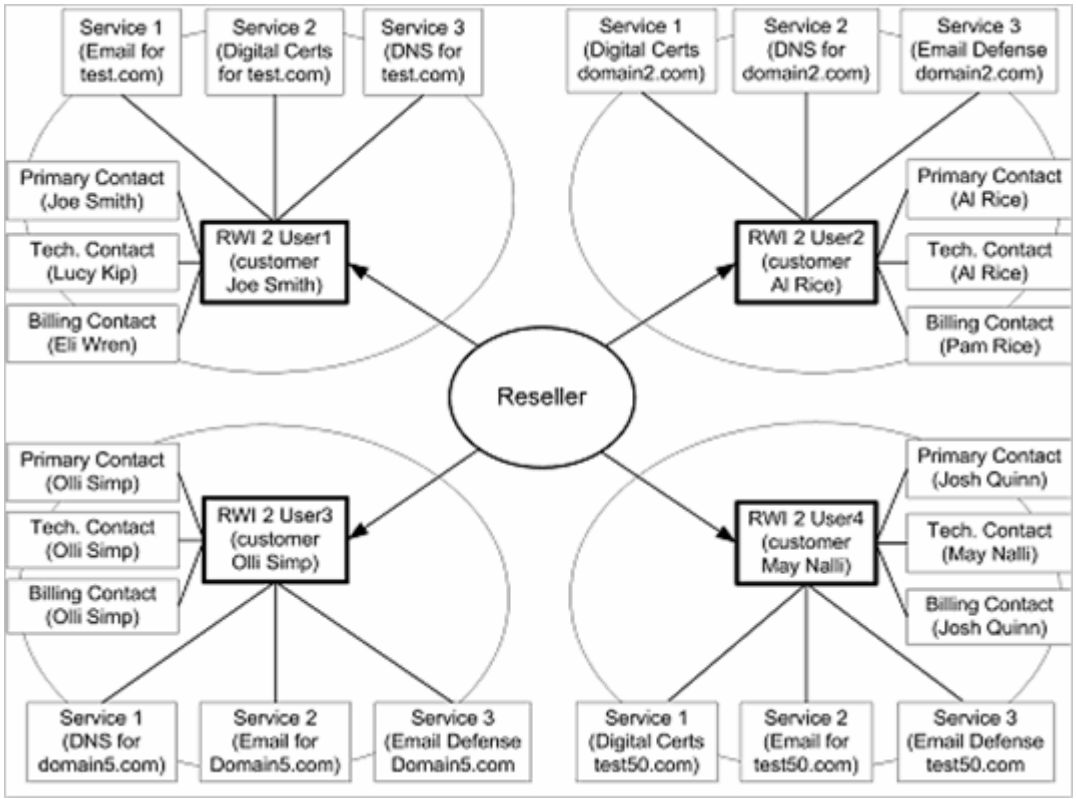
Each Reseller account can have any number of RWI 2 users associated with it. Having multiple RWI 2 users allows you to create one RWI 2 user profile for each customer, simplifying the organizing of customers and their respective orders. Alternatively, you can purchase and manage services on behalf of all your customers, using a single RWI 2 user account that you as a Reseller control. See the options below for a description of these processes.

All orders placed by any of the RWI 2 users associated with your Reseller account are billed to your Reseller account.

Important: Regardless of how you choose to organize your customers and their orders, each RWI 2 username that you create must be unique. For more information, see "Defining Usernames in Local Namespaces".

Option 1—Multiple RWI 2 user profiles are used, one for each customer.

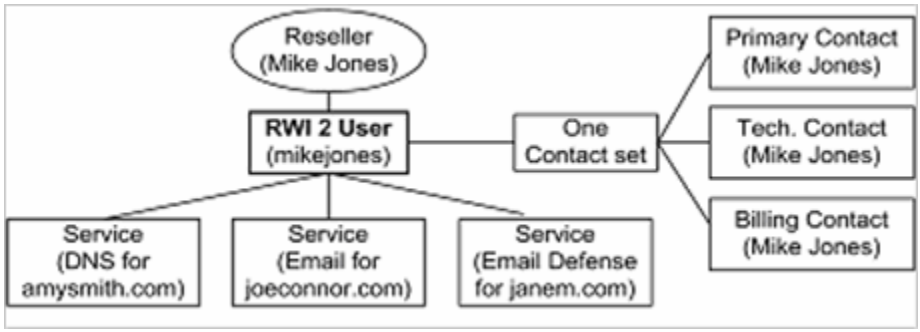
This option simplifies the management of your customers and their orders, and is useful if you don't have a customer-management system.



Benefit: This approach allows you to have a customer-related contact set that keeps all of your customer's information together.

Option 2—One RWI 2 user profile is used to manage all orders for all customers. Your Reseller contact data is used for all orders.

Use this option if you have your own customer-management system and would like to make purchases on behalf of all of your customers.



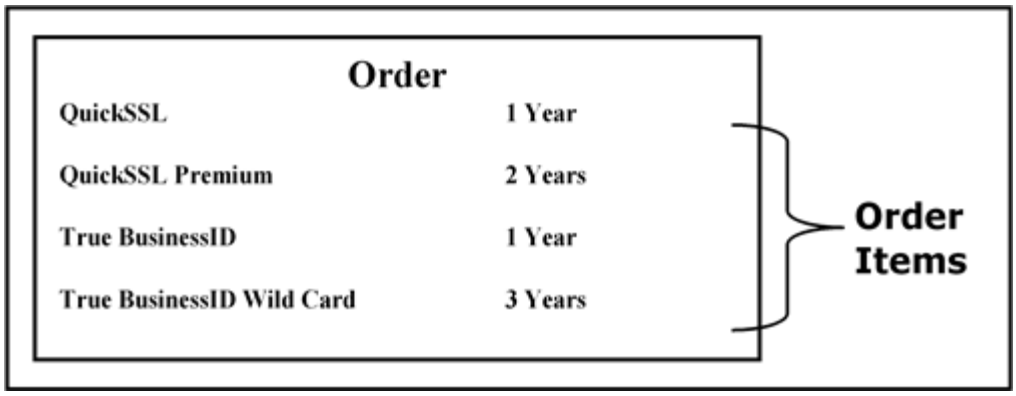
Disadvantages

You cannot filter customer information to view details regarding a specific customer.

Unlike Option 1, you cannot use this approach to manage your customers (as a customer control panel).

Orders and Order Items

Creating an order is similar to setting up a shopping cart, as it contains individual products, or order items. Once an order has been created, you can add up to 20 order items to it. After the items have been added, you can submit the order to process all order items in that order at once.



Order Items vs. Services Sold

Once an order item has been processed and fulfilled, it becomes a service sold. Only order items that have been processed can be found under **Services Sold**.

To further understand the difference between orders and services sold, it is helpful to think of the difference between a purchase order for a product and the actual product that was delivered.

Note: These concepts also apply to the search functionality which is discussed later in this document.

Logging in and Navigating

Accessing the Managed DNS System

To begin enabling the Managed DNS service, ensure that you have:

- Access to the RWI 2, which is used to enable and manage the Managed DNS service. Point your browser to https://resellers2.opensrs.net/.
  You can also access the Managed DNS service from the **DNS Management** link on the OpenSRS RWI main page: https://rr-n1-tor.opensrs.net/resellers/index
- A username and password for your Reseller login. This is the same Reseller login that you use to access the RWI.

To access the Managed DNS system

1. Open your browser and go to the **Reseller Login** page.
   The **OpenSRS Reseller Login** page opens.
2. Type your username and password in the **Username** and **Password** fields.
3. Click the **Reseller Login** button.
   The **User Management** page opens.

Navigating the Managed DNS System

There are five tabs in the RWI 2 that are used to order and manage your DNS orders: Users, Orders, Services Sold, DNS, and Settings.

Users tab

To order the Managed DNS service, you must first specify or create a user. The user profile includes the admin, billing, and technical contact information, so that whenever you perform a transaction or administrative activity, you do not need to re-enter contact information. From the **Users** tab, you can create, query, modify, or delete contacts and users.

Note: You cannot delete contacts if they are associated to any orders or purchases, or if the contact is primary. Additionally, you cannot delete users that are associated with any contacts, orders or purchases.

Orders tab

If you already have orders in the system you can use this tab to search for orders, order items, or order items by service.

Services Sold tab

Use this tab to search for services that you've purchased, and to see your upcoming payments.

DNS tab

This tab is divided into two sections: **Orders** and **Services Sold**.

Orders—This section pertains only to Managed DNS order items, and provides various search and view options.

Services Sold—This section pertains only to Managed DNS services, and provides various search and view options. This section also includes **Reseller Options**, which allow you to:

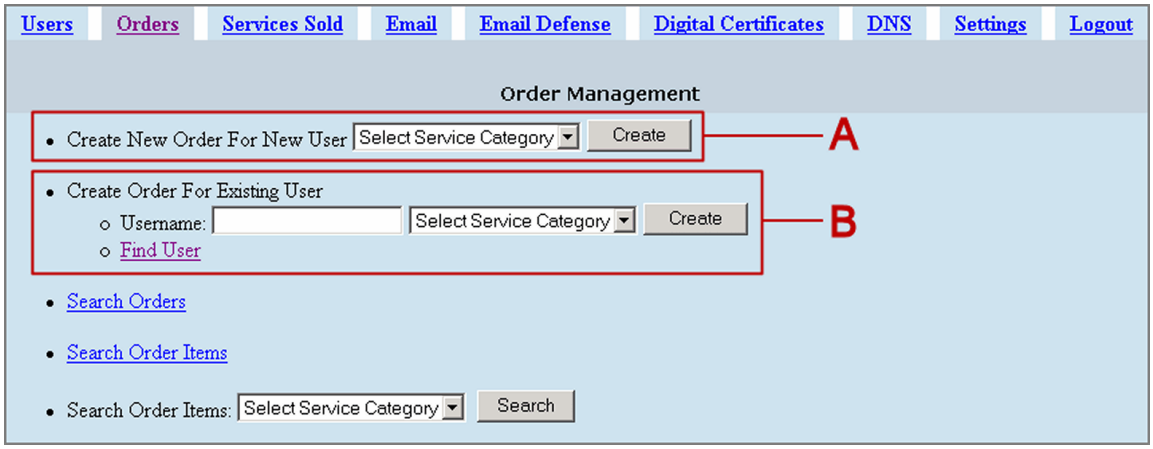
- Add your default DNS zone settings so that each time you enable the Managed DNS service for one of your customers, your default settings are applied.
- Manage the zone’s records and domain-forwarding settings by searching for the zone and selecting a configuration option.
- Enable or disable the domain forwarding, zone management, and templates features for your customers.

Settings tab

This tab provides access to the templates for system-generated email messages that notify customers and Resellers when a DNS order has been processed. You can also update your contact information from this tab.

Creating RWI 2 Users

After logging-in to the RWI 2, the first step in ordering a service is to specify the user. You can do this by either creating a new RWI 2 user, or choosing an existing user. The image below shows the RWI 2 user selection stage of the process.



A—Use this area to create a new user.

B—Use this area to base your new order on an existing user. You can manually enter the user's name, or perform a search for that user.

Important: When choosing a password for an RWI 2 user profile, do not use special characters. Creation of a new user will fail if you try to submit the characters !, @, or # in the password.

Usernames must be 1 - 256 characters; passwords must be 3 - 256 characters.

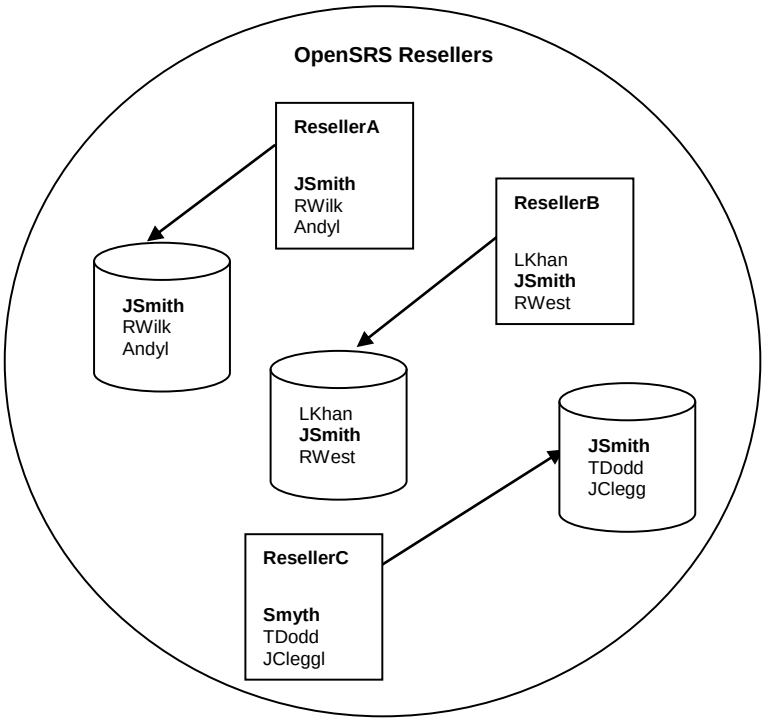
Defining Usernames in Local Namespaces

When provisioning an OpenSRS service, you provide usernames to identify your customers when they log on to the service. Until now, if you used any OpenSRS services other than domains, the usernames that you were able to assign had to come from the pool of available usernames that was shared among all OpenSRS Resellers. This shared namespace is referred to as a 'single' or 'unified' namespace. Due to the large number of usernames already in existence, it was extremely difficult to provide usernames that were both unique and meaningful to the user.

In order to make provisioning as straightforward as possible and to avoid any disruption to end users, OpenSRS now enables the use of 'private' or 'local' namespaces so that each provider has their own local namespace. By maintaining multiple local namespaces, duplicate user names are allowed in the OpenSRS system. User names that exist within the local namespace of one OpenSRS Reseller can be used by another end user in another Reseller's local namespace.

For example, suppose that Reseller A has a user called John Smith who uses the name JSmith. Reseller B has a user called Jill Smith who also uses the name JSmith. Now that local namespaces have been implemented, both of these users can continue to use the name JSmith, which would not be possible if there was only one namespace. If Reseller C has a new customer named Jeff Smith who wants to use the name JSmith, he may do so as this name will be stored in Reseller C's local namespace In addition, if Jill decides to transfer her services from Reseller B to Reseller A, she can retain her user name (JSmith).

The following diagram illustrates how local namespaces allow these three OpenSRS Resellers to have the same username, JSmith.



Impact: servicecontrolpanel.com and managednsservice.com

In order to implement this feature, you need to make a small change to the way that users access the two publicly available interfaces: servicecontrolpanel.com and managednsservice.com. Customers can access servicecontrolpanel.com to change passwords, and Resellers use managednsservice.com to maintain the zone files of DNS records purchased from OpenSRS.

Note: MWI (manage.opensrs.net, used for managing domains) is NOT affected by the implementation of local namespaces.

Previously, when users accessed these interfaces, the OpenSRS system used their usernames to identify them and determine which products they could manage. Now that more than one user can have the same username, the OpenSRS system requires some additional information in order to distinguish between users. The way that the system recognizes users is through the URL that they use to access the interfaces.

You need to add a unique word to the URLs that your customers use to access the servicecontrolpanel.com and managednsservice.com pages. This can be any word you choose, such as a brand name or your Reseller name. For example if you choose the word 'MyBrand', your customers can access the interfaces by using the following URLs:

- MyBrand.servicecontrolpanel.com
- MyBrand.managednsservice.com

Customizing the URL in this way tells the system the local namespace to which the user belongs so that it refers to the appropriate local namespace to verify the user's identity.

Note: Users can no longer access the servicecontrolpanel.com and managednsservice.com interfaces through the old URLs.

You can further customize the interfaces by uploading your logo so that users see a branded version of these two pages.

To customize the URL for servicecontrolpanel.com and managednsservice.com

1. In the RWI 2, click the **Settings** tab.
2. On the **Settings** page, under **Customize End User Screens**, click **servicecontrolpanel.com/managednsservice.com**.
3. In the **Input referring name** field, enter a name that will identify your end users, and click **Submit Name**.
   This name is added to the beginning of the URL that your end users use to log in to the interfaces.
4. Optionally, in the **New Logo Image** field, browse to the location of your logo and click **Upload Image Now**.

With the implementation of local namespaces, you are now guaranteed the availability of any username that you want to create, and you can create usernames for OpenSRS services that are the same as the usernames you already have in your own database.

API Integration

The implementation of local namespaces also enables tight integration of your system with the OpenSRS system through the API. Within your system, it is likely that each customer has a username that identifies them. When you integrate with OpenSRS through the API, if you can use the same usernames to provision OpenSRS services, integration is straightforward.

Previously, if a username was taken by another Reseller it would not be available to you and you would have had to do one of the following:

- Produce some sort of mapping between your internal usernames and the usernames provisioned in the OpenSRS system. This is not trivial, as you would have had to program extensively to hide the fact that there were multiple usernames.
- Maintain two unrelated usernames for each user: an internal username and an OpenSRS username. In this case either your users would have had to remember two usernames, or, more likely, you would have had to perform all the changes for your users.

Now, this is not an issue, because private namespaces allow you to tightly integrate with the OpenSRS system using your internal usernames as identifiers for OpenSRS services.

Setting Your Zone Template

Adding Settings to the Zone Template

As a Reseller, you can add your most frequently used zone settings to a template, so that each time you order the Managed DNS service for a domain, your default zone settings are automatically applied. Currently, only one default template is available.

Note:

- All records are optional, that is, no record type is required.
- Many of the zone template settings require an FQDN (Fully Qualified Domain Name). An FQDN includes a period at the end of the domain; however, if you fail to include the period when entering an FQDN in the zone template, a period is added for you.

To add setting to the zone template

1. Click the **DNS** tab.
2. In the **Reseller Options** area, click **Default Zone Setup**.
   The **Manage Zone Template** page opens.
3. Add your default settings to the template form.
   See "The Default Zone Template" for a description of the various fields in the form.
4. When done, click **Update Template**.

The Default Zone Template

The default zone template form is divided into sections according to the five record types. For each record type, you can add a setting, or change or delete a setting that you have already entered.

The template supports the use of an asterisk (*) as a wildcard to represent a third-level domain (or higher) in the following fields:

Record Type	Field
Hostname (A)	Hostname
Alias (CNAME)	Alias
Subdomain Delegation (NS)	Subdomain
Mail Exchange (MX)	Hostname
TXT	Hostname (Note: an '*' used in the Comment field will be treated as plain text)

Note: The '*' wildcard cannot be used in place of a top-level or second-level domain, and it cannot be used in the middle of a string (for example, test.*.domain.com).

The default zone-template also supports a {{zone}} placeholder, which can be used to apply the zone name to any of the following fields:

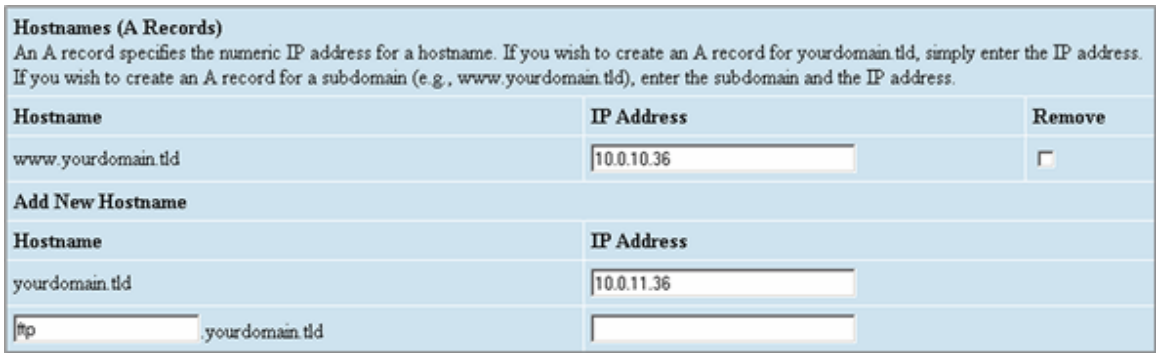
- Aliases (CNAME Records): Hostname
- Mail Exchanges (MX Records): Mail Exchange
- Subdomain Delegation (NS Records): Nameserver Hostname
- TXT Records: Comments

For example, for the zone test.com, if you enter www.{{zone}}.bob.com in the **Hostname** field of the **Aliases** section, the system saves the hostname as www.test.com.bob.com.

Note: The domain name for which the Managed DNS service is being ordered is automatically added to certain records. The **.yourdomain.tld** beside certain fields indicates where the domain name is added.

Hostnames (A records)

The hostname translates the domain name into the IP address that is used to access that domain.



You can specify a **Hostname** (optional) and an **IP Address** for each A record that you add to the template.

To add a hostname record

1. Complete the following fields:
    - **Hostname**—This setting is optional as it is automatically populated with the domain name for which the Managed DNS service is ordered. You can add a hostname prefix, for example, **www** or **ftp**.
    - **IP Address**—Type the IP address in the corresponding field.
2. Click **Update Template**.

Aliases (CNAME records)

An alias can be used when you want a subdomain to point to a computer outside of your domain.

Aliases (CNAME Records)
A CNAME record is used to create an alias for yourdomain.tld. This record points a hostname for this domain to another hostname.

Alias	Hostname	Remove
test.yourdomain.tld	www	☐

Add New Alias

Alias	Hostname
abc .yourdomain.tld	test10000.com
.yourdomain.tld	

You can specify two settings for each alias record in the template: the Alias, and a Hostname.

To add an alias record

1. Complete the following fields:
    - **Alias**—Enter the third level of the domain name to specify the subdomain (the domain that will redirect to another computer). Do not enter the full domain name; the first and second levels of the domain name are automatically added.
    - **Hostname**—In this column, type the FQDN of the domain that you want to access using a subdomain.
2. Click **Update Template**.

Mail Exchanges (MX records)

MX records determine how mail is delivered to your domain.

Mail Exchanges (MX Records)
An MX record specifies where mail is delivered for yourdomain.tld or a sub-domain. The mail server that mail is delivered to is referred to as the mail exchange. If you wish to create an MX record for mail sent to yourdomain.tld, enter the mail exchange and preference. If you wish to create an MX record for mail sent to a sub-domain (e.g., office2.yourdomain.tld), enter the sub-domain (e.g., office2), mail exchange and preference.

Add New Hostname

Hostname	Mail Exchange	Preference
yourdomain.tld	mail1.test5000.com	10
.yourdomain.tld		

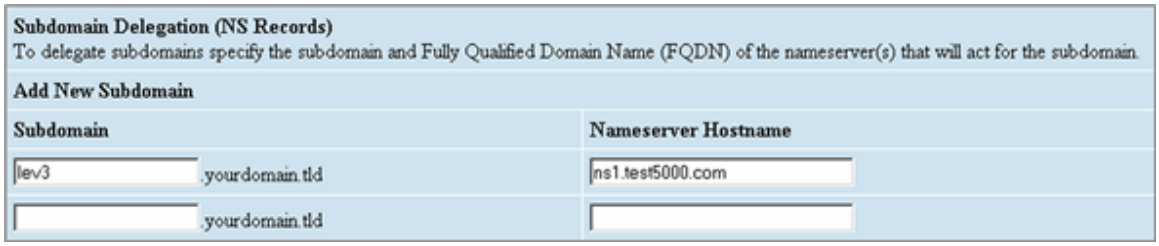
You can add three settings for each mail exchange record: a Hostname (optional), a Mail Exchange (the domain name of the mail server), and the Preference number for that mail server.

To add an MX record

1. Complete the following fields:
    - **Hostname**—The hostname setting is optional as it is automatically populated with the domain name for which the Managed DNS service is ordered. You can, however, add a hostname prefix or a third level of that domain name.
    - **Mail Exchange**—Type the FQDN of the mail server in this column.
    - **Preference**—Enter a number in this column to determine the mail server priority. The preference can be any number from 0 to 255.
2. Click **Update Template**.

Subdomain Delegation (NS records)

Subdomain delegation enables you to specify a nameserver for any of your subdomains.



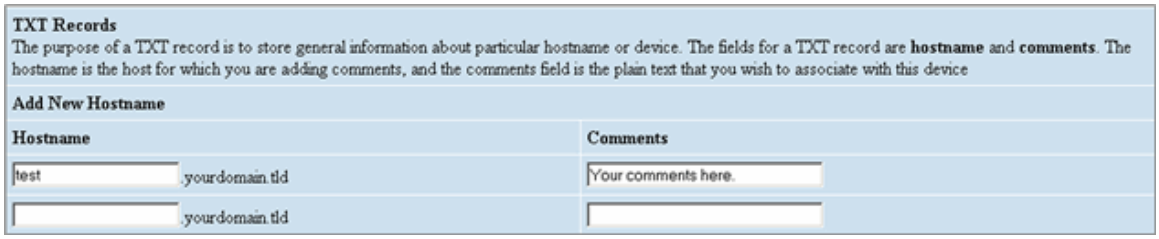
You can specify two settings for each subdomain delegation record that you want to add to the template: a Subdomain and the Nameserver Hostname (the FQDN of the nameserver) for that subdomain.

To add a Subdomain Delegation

1. Complete the following fields:
    - **Subdomain**—Enter the third level of the domain name.
    - **Nameserver Hostname**—Type the FQDN of the nameserver in this column.
2. Click **Update Template**.

TXT Records

A TXT record allows you to attach comments to a hostname or device.



TXT records may be used to validate that email is being sent from the IP address of the domain's mail server and not from a server spoofing the domain name to spread spam, viruses, or other email threats. This email-verification technique is used by Sender Policy Framework, Sender ID Framework, and Domain Keys Framework.

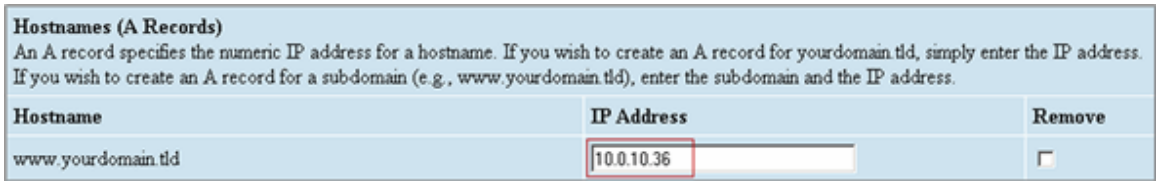
To add a TXT Record

1. Complete the following fields:
    - **Hostname**—The hostname setting is optional as it is automatically populated with the domain name for which the Managed DNS service is ordered. You can, however, add a hostname prefix or a third level of that domain name.
    - **Comments**—Enter your plain-text comments here, to a maximum of 254 characters.
2. Click **Update Template**.

Changing a Zone Record

Each of the records that you add can be edited, though not all information associated with that record can be edited. For example, you can edit a hostname record's IP address, but not the hostname itself. Editable settings are displayed in a white textbox.

Note: Once you change a setting, the previous setting value cannot be retrieved.



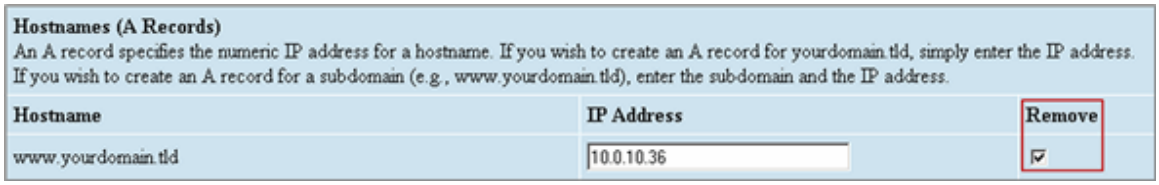
To change a zone record

1. Replace a record setting with the new information.
2. Click **Update Template**.

Removing a Zone Record

If you no longer need a particular zone record, you can remove it from your template.

Note: Once you remove a record, that record cannot be retrieved.



To remove a zone record

1. Click the checkbox in the **Remove** column for that setting.
2. Click **Update Template**.

Zone Permissions

Zone permissions determine whether your customers have access to the URL forwarding, template management, and zone management functions for their domains.

Each time you change your zone permissions, those permissions are applied to new zones only. For example, if you disable URL forwarding, it isn't disabled for any zones that were already enabled. Changing permissions for existing zones must be done on a zone-by-zone basis.

If enabled in your Reseller settings, these functions are available to your customers through the DNS PMI, the RCL, and the API implementation. The PMI is available at:

http://*brand*.managednsservice.com

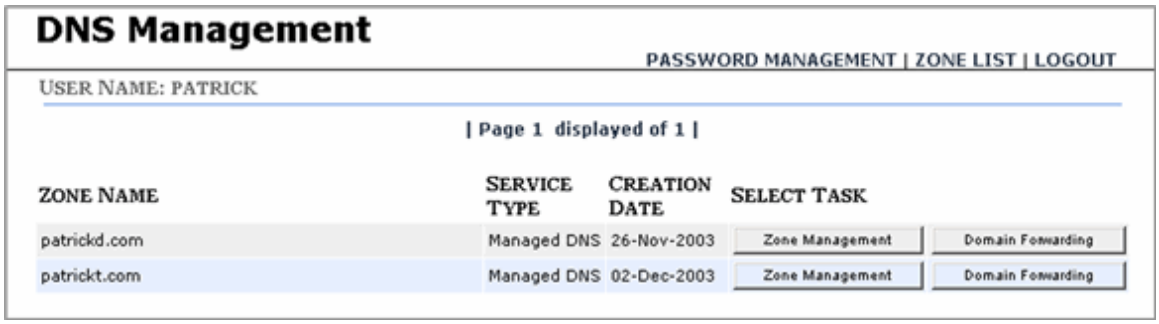
where *brand* identifies the local namespace to which the user belongs.

For more information, see "Impact:servicecontrolpanel.com and managedmsservice.com".

The DNS PMI is also available on the Horizon system for Resellers to test and view the functionality. The interface is available at:

https://*brand*.resellers2-test.opensrs.net/dns/

The Public Manage Interface for DNS



URL forwarding—enables your customers to specify a URL to which visitors to their domain are redirected. If this setting is disabled, the URL-forwarding option is not available.

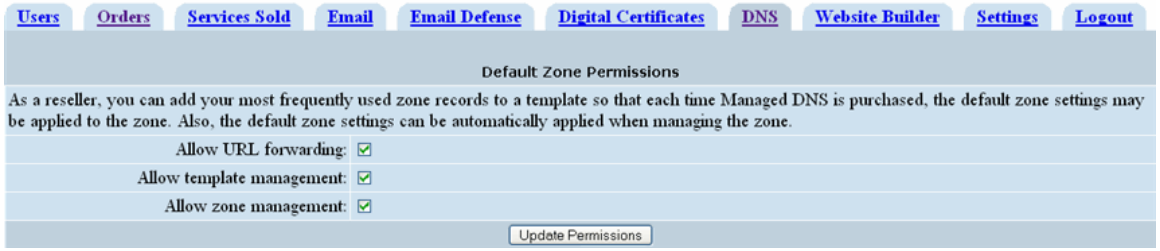
Template management—permits your customers to use templates that indicate that their domain's website is under construction, or that the domain is for sale. The "domain for sale" page allows customers to customize the page using their own text or HTML. If this setting is disabled, the template management option is not available.

Zone management—enables your customers to modify their zone settings themselves. If this setting is disabled, the zone management option is not available.

Changing Default Zone Permission Settings

If left unchanged, all of your zone permission settings are activated, providing your customers with access to them. Follow these steps to deactivate settings, or to edit settings that you've already created.

1. Click the **DNS** tab.
2. In the **Reseller Options** section, click **Default Zone Permissions**.
   The **Default Zone Permissions** page opens.

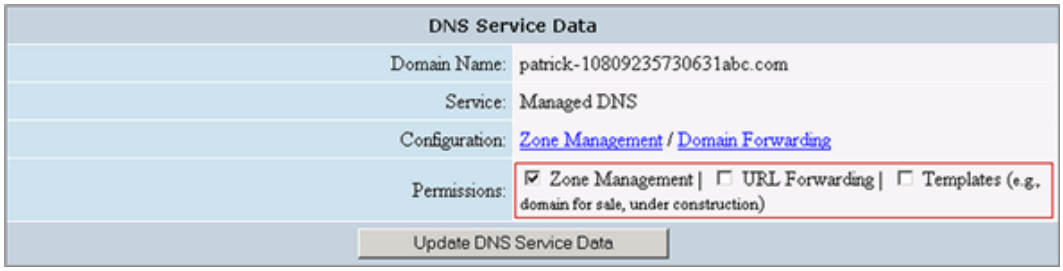


3. Click the checkbox beside each permission to enable or disable it.
4. Click **Update Permissions**.

Changing Zone Permissions for a Specific Domain

In order to change a domain's zone permission settings, you need to search for that domain as a service sold; that is, the Managed DNS order for that domain must be processed and completed.

1. Click the **DNS** tab.
2. In the **Services Sold** section, click **Active**. The **Search Services Sold** page opens.
3. Use the fields in the search form to define your search. All fields are optional; however, more information returns more precise results.
4. Click **Search Services Sold**. Services that match your search criteria are returned at the bottom of the page.
5. In the **Service Sold ID** column, click the ID number of the domain for which you want to change settings. You can check the domains in the **Description** column to help identify the domain that you want to update.
   The **View Service Sold** page opens.
6. In the **DNS Service Data** section, located at the bottom of the page, click the checkboxes beside **Zone Management**, **URL Forwarding**, and **Templates** to activate or deactivate those features

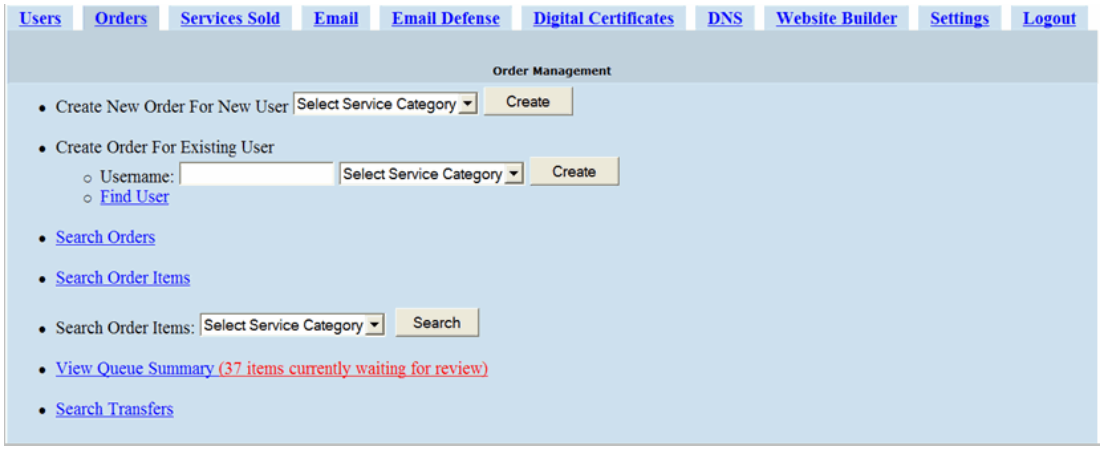


7. Click **Update DNS Service Data**.

Ordering the Managed DNS Service

To order the Managed DNS Service

1. Click the **Orders** tab.
   The **Order Management** page opens.



To create an order for a new user:

In the **Create New Order For New User** drop-down list, choose **DNS**, and then click **Create**. The **Create User for Order** page opens. This page is divided into two areas:

- **Create User for Order**—To create a new account, enter a username and password in the corresponding fields. Confirm the password by re-entering it in the space provided, and enter a description.
- **Primary Contact**—You must define a primary contact that is associated with the new user that you have defined above. To do this, complete all of the contact information, and then click **Continue** to proceed with your order.

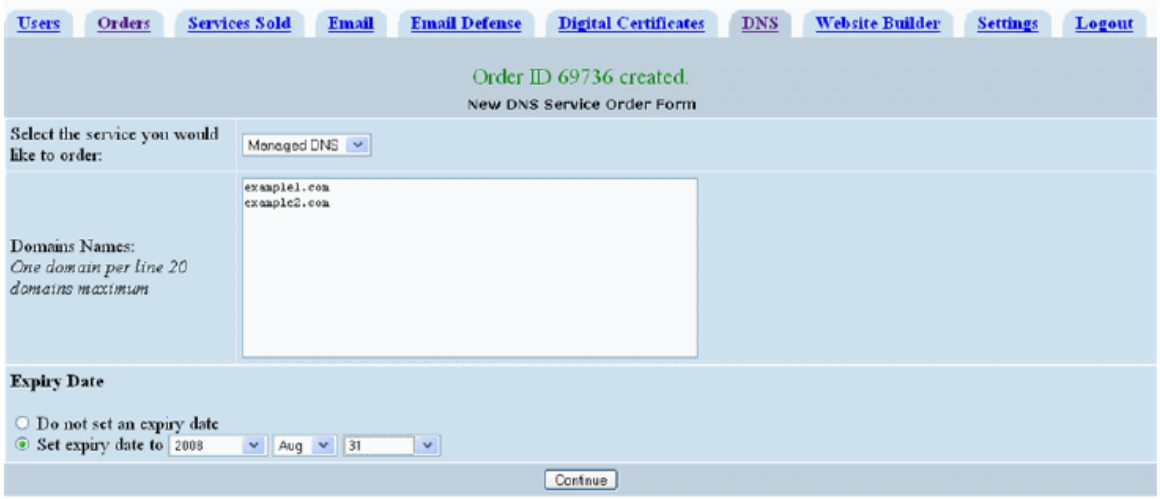
To order the service for an existing user:

If you know the username—Type an existing username in the **Create Order For Existing User** field, choose **DNS** from the drop-down list, and then click **Create**.

If you do not know the username—Click **Find User**. On the **Please select user** page, enter the search criteria, and then click **Search Users**. The page reloads, with users listed below the search criteria fields. Select the user in the **Select** column, choose **DNS** from the drop-down list at the bottom of the page, and then click **Create Order**.

In the **New DNS Service Order Form** page, your blank order is automatically created. This is the first of two forms that you must complete.

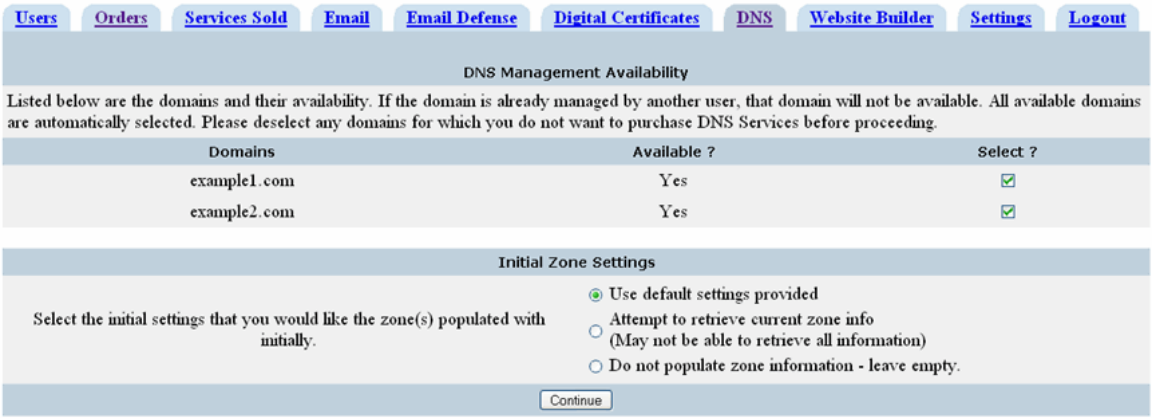
2. In the **Domains Names** text box, type each of the domains for which you want to order the Managed DNS service. Type one domain per line, 20 domains maximum.



3. In the **Expiry Date** section, choose an expiry option.
   - If you select **Do not set an expiry date**, the DNS service remains in effect until the service is cancelled, suspended, or an expiry date is assigned.
   - If you set an expiry date, the DNS service is in effect until the date selected.

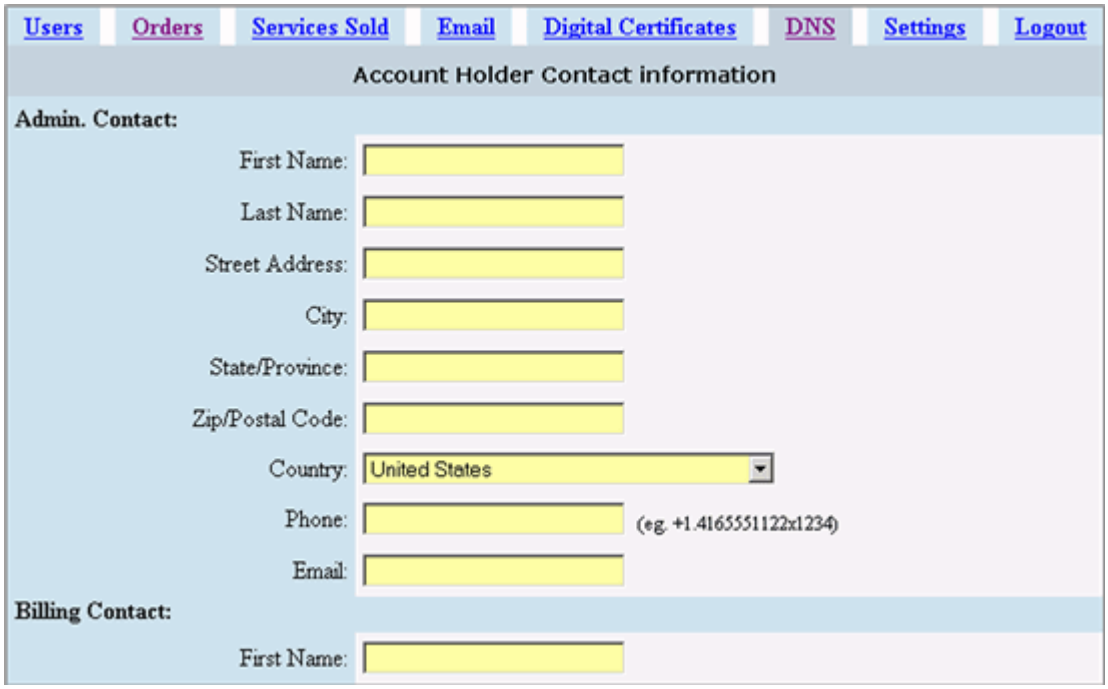
Note: You can change the expiry date at any time, provided that the service has not already expired. See "Updating Renewal and Expiration Settings".

4. Click the **Continue** button. The **DNS Management Availability** page opens, listing each of the requested domains and their availability.



5. Each available domain is automatically selected. In the **Select** column, deselect any domains for which you do not want to order the Managed DNS service.

6. In the **Initial Zone Settings** section, choose the zone setting option that you want to use to populate the zone:
   - **Use default settings provided**—If you added your settings to the default template, choose this option to apply those settings. See "Setting Your Zone Template".
   - **Attempt to retrieve current zone info**—If this is an existing domain, the system attempts to retrieve the MX, A, CNAME, TXT, and NS records, excluding the NS record for the domain itself. Depending on the existing configuration, not all settings may be retrieved. The system tries to retrieve records with the following prefixes: www, mail, ftp, pop, pop3, smtp, www2, imap, email, help, test, http, ns1, ns2, ns3, spam.
   - Do not populate zone information—Choose this option to add the zone information later. See "Managing Zone Information".
7. Click **Continue**. The **Account Holder Contact** information page opens.



8. Enter the admin, billing, and tech contact information for the Managed DNS account.
   If the same contact is used for admin, billing, or tech, use the drop-down lists to populate the contact details. Information for all three contacts is required.
9. Click **Save to Pending** or **Submit Order for Processing**.
   - If you choose **Save to Pending**, the **Order item successfully created** page opens and your item is added to the order. Choose **Process** or **Cancel** from the drop-down list at the bottom of the page, and then click **Go!**

- If you choose **Submit Order for Processing**, the **Order Processed** page opens, displaying the completed order.

10. To view the details of your order or order item, click the number in the **Order Item ID** column.
    The **Order Item Details** page opens.

After the order has been processed, the zone is published to the Managed DNS service nameservers within five minutes, and a notification message is (optionally) sent to the Reseller and the customer to notify them that the Managed DNS order has been processed. See "Customizing Messages and Updating Contacts" to deactivate the messaging or to change the message content.

Note: You still need to change the settings on your own nameservers. See "Nameservers for DNS".

Transferring the Managed DNS Service

It has always been possible to transfer domains from one service provider to another, and this process is dictated and enforced by the respective domain registries. All the OpenSRS services (SSL Certificates, DNS, Email Service, and Website Builder) can easily be transferred from one OpenSRS Reseller to another.

Note: Services that are provided by non- OpenSRS Resellers cannot be transferred to a OpenSRS Reseller; in this case you need to enter a new order for the service.

When a user with one or more services through a OpenSRS Reseller wants to transfer their business to another OpenSRS Reseller, the gaining Reseller initiates a transfer request. Services might need to be transferred when:

- One Reseller buys another Reseller.
- Reseller goes out of business, and the customer needs a new Reseller.
- Reseller tries to order a new OpenSRS service for a customer and finds that this customer is already served by another Reseller.

Although we do not encourage customers to transfer services from one OpenSRS Reseller to another, if a customer asks a Reseller to transfer their services, the transfer can be be done with little disruption to the customer.

Note: Transfer requests should be processed through the RWI 2. There are API calls that can be used to automate the process, but since transfers can only happen when the customer is already with a OpenSRS Reseller, we do not anticipate that the number of transfer requests will warrant trying to automate the process.

Transfer Process

The transfer process typically follows these steps:

1. You try to order a service for new customer, and you get an error message that states that the service is unavailable. This indicates that the customer likely already has the service through another OpenSRS Reseller.
2. After confirming that the customer already has the service with another Reseller, you initiate a transfer request through the RWI 2.
3. Transfer request is validated by the system to ensure that the request is for currently held OpenSRS services and that it includes any dependent services.
4. Order status is set to **Pending**.
5. Request for authorization is sent via email to end user admin contact of record.
6. End user clicks the link in the email and is taken to the **Transfer Authorization** page to approve the transfer.

7. Services are transferred to the gaining Reseller, and contact and credential information is sent to the gaining Reseller. If some services remain with the original Reseller, contact and credential information (userid and password) exists in both losing Reseller and gaining Reseller namespaces.
8. System adjusts billing so that the Reseller who has lost the service (losing Reseller) is not billed anymore, and instead, the new Reseller (gaining Reseller) is billed.

   Note: If there are insufficient funds in the gaining Reseller's account, the Reseller's account balance can become negative as a result of the transfer, and the service remains active for at least 30 days.
9. System notifies end user, gaining Reseller, and losing Reseller that transfer is successful.

Note: When you transfer one or more OpenSRS services from another Reseller, your customers do not need to change their login information. For more information, see "Defining Usernames in Local Namespaces".

Submitting a Transfer Order

If you try to place an order for a service and the customer already has that service with another OpenSRS Reseller, you get an error message. In this case, you need to submit a transfer request rather than a new order. Transfer requests are initiated by the gaining Reseller when requested by the customer. They may also be initiated by an Administrator on behalf of a user who has been abandoned because their Reseller is no longer in business.

If you issue a request to transfer a service that is dependent on another service, both services are transferred. For example, if you try to transfer the Email Defense service, Email is also transferred, as well as all the email addresses and Email Defense services on that particular domain (assuming the current owner approves it). This means that you do not need to specify all the email addresses that need to be transferred; specifying one is sufficient. This also means that, due to privacy concerns, you cannot see all the services that will be transferred until the transfer request is approved.

Note: If dependent services have different owners, that is, more than one approver is needed to authorize the transfer of the services, the transfer cannot proceed, and the transfer request is refused by the system. In order to transfer these services, the end user needs to contact the previous provider and update their contact details so that the same email address is used for all the services they want to transfer.

To transfer OpenSRS services for an existing user

1. In the RWI 2, click the **Orders** tab.
2. On the **Order Management** page, in the **Create Order For Existing User** field, enter the username , select **Transfer** from the drop-down list, and then click **Create**.

   Alternatively, click **Find User**. Enter the search criteria and click **Search Users**. Click a radio button to select a user, select **Transfer** from the **Select Service Category** drop-down, and then click **Create Order**.
3. On the **Transfer Service** page, enter the domain name in the **Domain** field.
4. Select the service that you want to transfer from the **Select Service** drop-down list.
5. Click **Add to Order**.
   The **Transfer Contact Information** page appears for the service.
6. Enter the applicable contact information.
7. Save the transfer order by clicking one of the following:
   - **Save to Pending**—saves the order as pending and opens the **Service Order** page where you can add additional items to the order, cancel the order, or submit it for processing.
   - **Submit Order for Processing**—processes the order immediately.

To transfer OpenSRS services for a new user

1. In the RWI 2, click the **Orders** tab.
2. On the **Order Management** page, in the **Create New Order for New User** field, select **Transfer** from the drop-down list.
3. On the **Create User for Order** page, enter the user name, password, and contact information, and then click **Continue**.
4. On the **Transfer Service** page enter the domain name in the **Domain** field, and select the service that you want to transfer from the **Select Service** drop-down.
5. Click **Add to Order**.
   The **Transfer Contact Information** page appears for the service.
6. Enter the applicable contact information.
7. Save the transfer order by clicking one of the following:
   - **Save to Pending**—saves the order as pending and opens the **Service Order** page where you can add additional items to the order, cancel the order, or submit it for processing.
   - **Submit Order for Processing**—processes the order immediately.

Adding Transfer Items to an Order

You can add items to a transfer order as long as the order status is **Pending**.

To add items to an order

1. In the RWI 2, click the **Orders** tab.
2. On the **Order Management** page, click **Search Transfers**.
3. On the **Search Transfers** page, enter your search criteria, and click **Search Orders**.
4. Click the **Order ID** number to drill down to the order details.
5. At the bottom of the screen, from the category drop-down, select **Transfer** to add another service to the transfer order, and then click **Add Item**.
6. On the **Transfer Service** page, complete the **Domain** field.
7. From the **Select Service** drop-down, select the service that you want to add to the transfer order, and then click **Add to Order**.
8. On the **Transfer Contact Information** page, enter the contact details.
9. Click **Save to Pending** or **Submit Order for Processing**.

End User Authorization

Once a transfer order is submitted, a request for authorization is sent via email to the admin contact of record. The email contains a link to the **Transfer Authorization** page that the customer needs to access to authorize the transfer. The customer has seven days from the time that the transfer request is submitted to respond to the authorization request; otherwise, the transfer request is cancelled and the customer is notified that the transfer request has expired.

The customer clicks the link in the email and is taken to the **Transfer Authorization** page to approve the transfer.

Note: If an order contains more than one transfer item, only one authorization email is sent. Consequently, if a customer has several services that could be transferred, they have to approve all of them or approve none.

Transfer Authorization Page

You can customize the page where end users approve their transfer requests by adding your logo to the page.

To upload a logo to the **Transfer Authorization** page

1. In the RWI 2, click the **Settings** tab.
2. Click **Transfer Authorization**.

3. On the **Customize End-User Transfer Authorization Screen** page, click **Browse** and navigate to the logo that you want to upload.
4. Click **Upload Image Now**.

Cancelling Transfer Orders

You can cancel any orders that you initiated as long as they have not yet been approved, rejected, or expired. Transfers can be cancelled if their status is **Pending**, **In Progress**, or **Waiting Approval**. If the order contains transfer items in *final* states (approved, expired, rejected) the whole order can NOT be cancelled. However, if the order contains at least one approved transfer item or at least one successfully processed order item, you can cancel specific order items from the order.

Warning: When you cancel an order, you cancel everything in the order, including any non-transfer order items.

To cancel a transfer order

1. In the RWI 2, click the **Orders** tab.
2. On the **Order Management** page, click **Search Transfers**.
3. On the **Search Transfers** page, enter the search criteria, and click **Search Orders**.
4. In the **Action** column, click **Cancel**.
5. Click **Submit**.

The system notifies the customer and the gaining Reseller that the order has been cancelled. If the order is cancelled while it is still Pending, notification is not sent.

Cancelling Items from a Transfer Order

You can cancel one or more items from a transfer order before the transfer is authorized by the customer.

To cancel items from a transfer order

1. In the RWI 2, click the **Orders** tab.
2. On the **Order Management** page, click **Search Transfers**.
3. On the **Search Transfers** page, enter your search criteria, and click **Search Orders**.
4. Click the **Order ID** number to drill down to the order details.
   The **Service Order** page appears.
5. Cancel an order item by clicking **Cancel** in the **Action** field.

The status for the item changes to **Cancelled**, and the **Action** changes to **N/A**.

The system notifies the customer and the gaining Reseller that the order item has been cancelled. If the order had a status of **Pending**, notification is not sent.

Note: Order items can only be cancelled if the status of the transfer is **In Progress** or **Waiting Approval**.

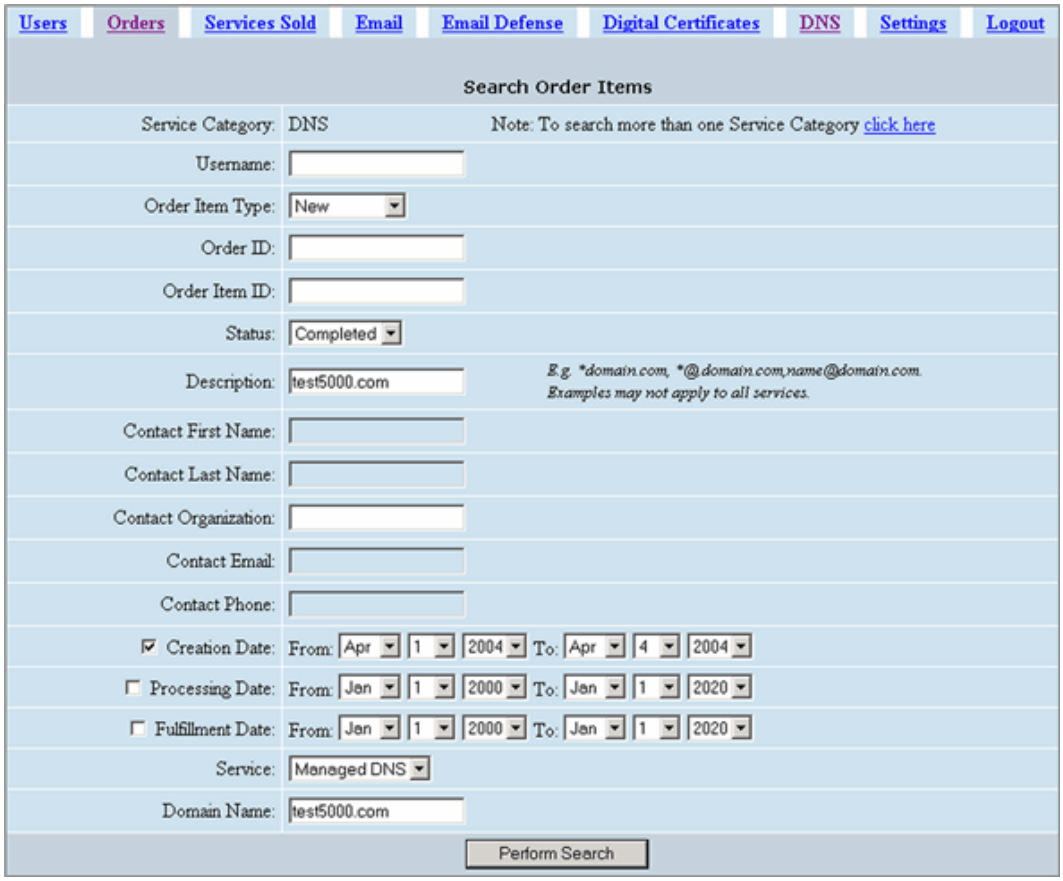
Searching Managed DNS Order Information

Searching for Managed DNS Order Items

Follow the steps below to search for Managed DNS order items. This search includes any Managed DNS services that you have ordered, regardless of the state that the order is in.

To search for Managed DNS order items

1. Click the **DNS** tab.
2. From the **Orders** section, click **Search DNS Order Items**.
   The **Search Order Items** page opens.
3. Use the fields and drop-down lists to refine your search.
   All fields are optional; however, more information generates more precise search results. If you know the domain name, enter it in the **Description** field to limit and speed up the search.
4. Click **Perform Search**.
   Search results are returned at the bottom of the page.



5. To sort your search results: click any of the following column headings: **Service Category**, **Username**, **Order ID**, **Order Item ID**, **Service**, **Description**, **Status**, **Type**, or **Creation Date**.
6. To view order details, click the number in the **Order ID** column.
   The **Service Order** page opens with details listed at the bottom of the page. See "Order Details Page" for more information.

Users | Orders | Services Sold | Email | Email Defense | Digital Certificates | DNS | Settings | Logout

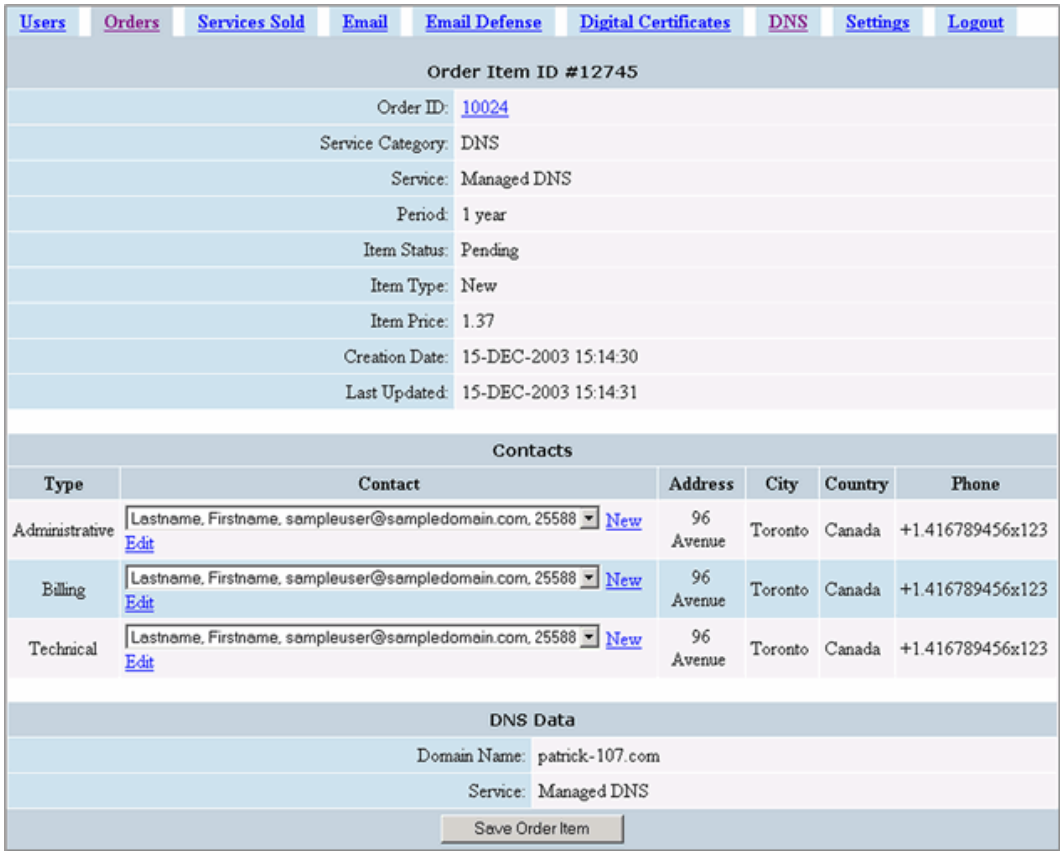
Service Order

Order ID:	10024
User:	qa107
Order Status:	Pending
Order Price:	1.37
Creation Date:	15-DEC-2003 15:14:30
Last Updated:	15-DEC-2003 15:14:44

Order Items

Order Item ID	Reference ID	Service Category	Service	Status	Type	Price	Creation Date	Last Updated	Action
12745	N/A	DNS	Managed DNS	Pending	New	1.37	15-DEC-2003 15:14:30	15-DEC-2003 15:14:31	Cancel Item
12746	N/A	DNS	Managed DNS	Pending	New	0.00	15-DEC-2003 15:14:42	15-DEC-2003 15:14:43	Cancel Item

7. To view order item details, click the number in the **Order Item ID** column.
   The **Order Item ID** page opens, with details listed at the bottom of the page. See "Order Item Details Page" for more information.



Users | Orders | Services Sold | Email | Email Defense | Digital Certificates | DNS | Settings | Logout

Order Item ID #12745

Order ID:	10024
Service Category:	DNS
Service:	Managed DNS
Period:	1 year
Item Status:	Pending
Item Type:	New
Item Price:	1.37
Creation Date:	15-DEC-2003 15:14:30
Last Updated:	15-DEC-2003 15:14:31

Contacts

Type	Contact	Address	City	Country	Phone
Administrative	Lastname, Firstname, sampleuser@sampledomain.com, 25588 New Edit	96 Avenue	Toronto	Canada	+1.416789456x123
Billing	Lastname, Firstname, sampleuser@sampledomain.com, 25588 New Edit	96 Avenue	Toronto	Canada	+1.416789456x123
Technical	Lastname, Firstname, sampleuser@sampledomain.com, 25588 New Edit	96 Avenue	Toronto	Canada	+1.416789456x123

DNS Data

Domain Name:	patrick-107.com
Service:	Managed DNS

Save Order Item

Searching for Order Items According to their Status

There are several options for viewing Managed DNS order items, and several corresponding actions associated with each of those views. Choose from one of the following views:

- Pending
- Completed
- Refunded
- Declined
- Cancelled

To search for order items according to their status

1. Click the **DNS** tab.
2. In the **Order Item Views** section, click one of the order status options, for example, **Pending**.
   The **Search Order Items** page opens.
3. Use the fields and drop-down lists to refine your search.
   All fields are optional; however, more information generates more precise search results.

4. Click the **Perform Search** button.
   Search results are returned at the bottom of the page.

   To sort your view results: click any of the following column headings: **Service Category**, **Username**, **Order ID**, **Order Item ID**, **Service**, **Description**, **Status**, **Type**, or **Creation Date**.

   To view order details: click the number in the **Order ID** column. Details are listed at the bottom of the page. See "Order Details Page" for more information.

   To view order item details: click the number in the **Order Item ID** column. Details are listed at the bottom of the page. See "Order Item Details Page" for more information.

Order Details Page

Once you've searched for order items, you can use the search results to access the details for a particular order.

To view order details, search for order items: see "Searching for Managed DNS Order Items" or "Searching for Order Items According to their Status". From the **Search Result** section in the **Search Order Items** page, click the number in the **Order ID** column. The **Service Order** page opens.

The **Service Order** page is divided into two areas: **Service Order** and **Order Items**.

Item	Description
Service Order	
Order ID	This is the unique number that the system assigned to the order.
User	Displays the user profile name that you either selected or created while placing your Managed DNS order. Click the username to open the **User Information** page. From this page you can view: ▪ Details about the user ▪ Contacts associated with the user ▪ The user's orders
Order Status	Displays the status of the Managed DNS order, which can either be **Pending**, **Completed**, or **Declined**.
Order Price	Displays the total price of the order, which includes the sum of all the order items.
Creation Date	The date and time that the order was created.
Last Updated	The date and time that the order was last updated.
Order Items	
Order Item ID	This is the unique number assigned to the order item. Click this number to open the **Order Item Details** page. See "Order Item Details Page" for more information about this page.

Item	Description
Reference ID	This is not applicable to Managed DNS orders.
Service Category	In this case, the service category is **DNS**.
Service	The specific service for the service category. In this case, the service is **Managed DNS**.
Status	Displays the status of the order item, which can be either **Pending**, **Completed**, **Refunded**, **Declined**, or **Cancelled**.
Type	The order item type for DNS is **New**.
Price	Because Managed DNS is now a free service, this field always shows $0.00.
Creation Date	The date and time that the order item was created.
Last Updated	The date and time that the order item was last updated.
Action	Action varies according to the status of the order item. If the order item is in pending state, the possible action is **Cancel**. Otherwise, no action is available.

Order Item Details Page

Once you've searched for order items, you can use the search results to access the details for a particular order item.

To view order item details: search for order items. See "Searching for Managed DNS Order Items" or "Searching for Order Items According to their Status". From the **Search Results** section in the **Search Order Items** page, click the number in the **Order Item ID** column. The **Order Item ID** page for that particular order item opens.

The **Order Item ID** page is divided into three areas: **Order Item ID**, **Contacts**, and **DNS Data**.

Item	Description
Order Item ID #	
Order ID	The unique, system-assigned number associated with the order to which you added order items. Click the number to open the **Service Order** page. See "Order Details Page" for more information.
Service Category	In this case, the service category is **DNS**.
Service	In this case, the service is **Managed DNS**.
Item Status	The status of the completed order, which can be: **Pending**, **Completed**, **Refunded**, **Declined**, or **Cancelled**.
Item Type	The type of order item, which is **New for DNS**.
Item Price	Because Managed DNS is now a free service, this field always shows $0.00.

Item	Description
Creation Date	The date and time that the order item was created.
Last Updated	The date and time that the order item was last updated.
Contacts	
	Displays the administrative, billing, and technical contacts associated with the user of the Managed DNS service.
DNS Data	
Domain Name	The domain name for which the Managed DNS service was ordered.
Service	In this case, the service is **Managed DNS**.

The contact information associated with a specific order item may be updated from this page by clicking the **New** or **Edit** buttons beside each contact type.

To create a new contact: click **New**. The **Create Contact** page opens. Enter the desired information, and click **Create Contact**.

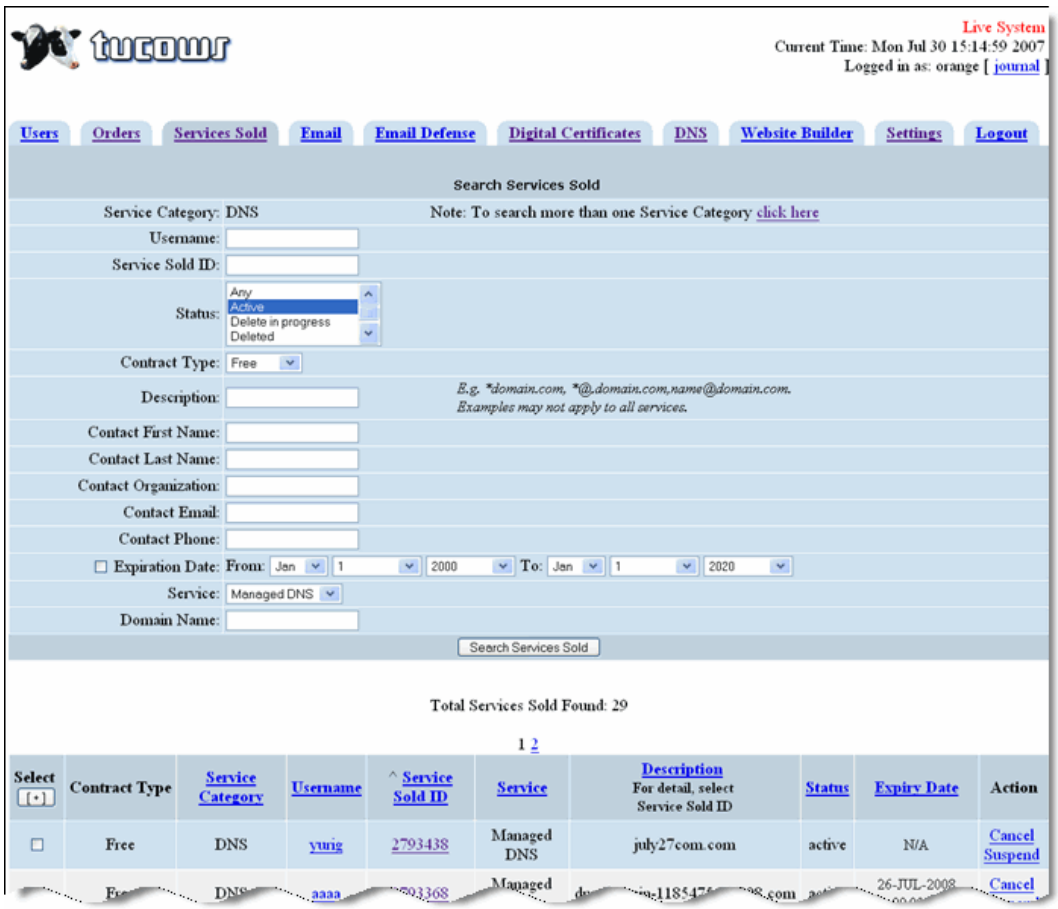
To update an existing contact: click **Edit**. The **View Contact Details** page opens. Enter the desired information, and click **Save**. To revert back to the original contact information, click **Reset.**

Searching for Managed DNS Services Sold

Searching for Services Sold

Choose this search option to view completed Managed DNS orders.

1. Click the **DNS** tab.
2. In the **Search** section below **Services Sold**, click the **Search DNS Services Sold** link.
   The **Search Services Sold** page opens.
3. Use the fields and drop-down lists to refine your search. All fields are optional; however, more information generates more precise search results.
4. Click **Search Services Sold**.
   Search results are returned at the bottom of the page.



To sort your search results: click any of the following column headings: **Service Category**, **Username**, **Service Sold ID**, **Service**, **Description**, **Status**, or **Expiry Date**.

To view Service Sold details: click the number in the **Service Sold ID** column. The **View Service Sold** page opens.

Searching for Services Sold that are Approaching Expiry

1. Click the **Services Sold** tab.
2. From the **Expiry Management** list, click one of the expiration ranges, for example, **Expiring in 90-61 days**.
   All services expiring during that range are listed.

To view expiring services sold by service category: click the **Service Category** column header. The list of services sold is re-sorted, and grouped according to service category.

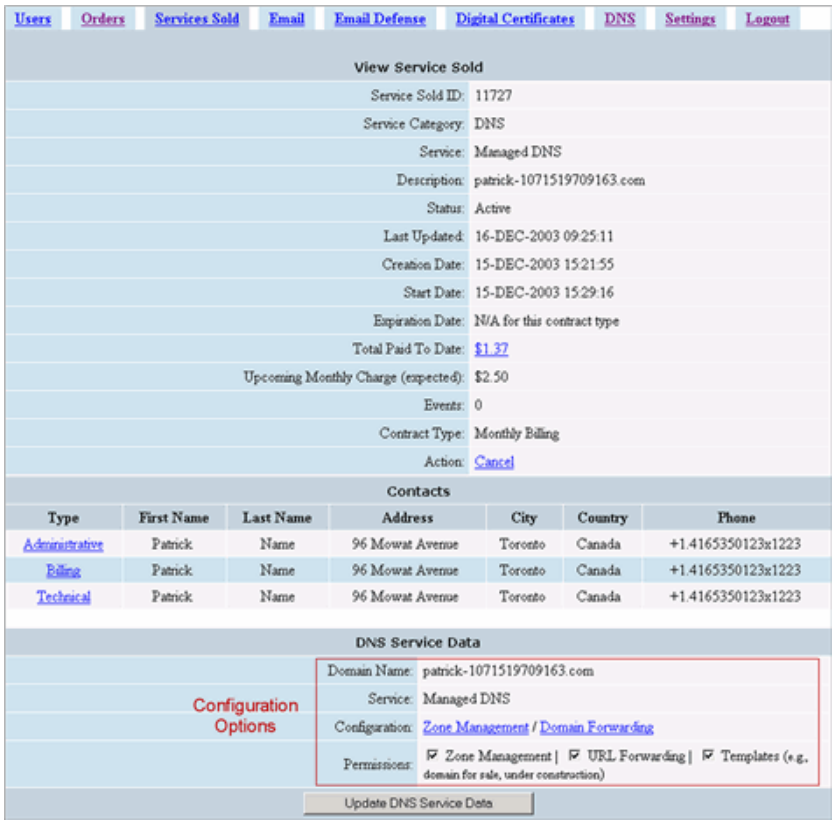
Managing Zone Information

Changing Zone Settings for a Specific Domain

To change the zone settings for a specific domain, search for Managed DNS for that domain as a service sold. The Managed DNS service order items for that domain must be processed and completed.

To change zone settings

1. Click the **DNS** tab.
2. In the **Services Sold** section, click **Search DNS Services Sold**.
   The **Search Services Sold** page opens.
3. Use the fields in the search form to define your search.
   All fields are optional; however, more information returns more precise results.
4. Click **Search Services Sold**. Services sold that match your search criteria are returned at the bottom of the page. See "Searching for Services Sold" for more information.
5. In the **Service Sold ID** column, click the ID number of the domain for which you want to change settings. Check the domains in the **Description** column to help identify the domain that you want to update.
   The **View Service Sold** page opens.

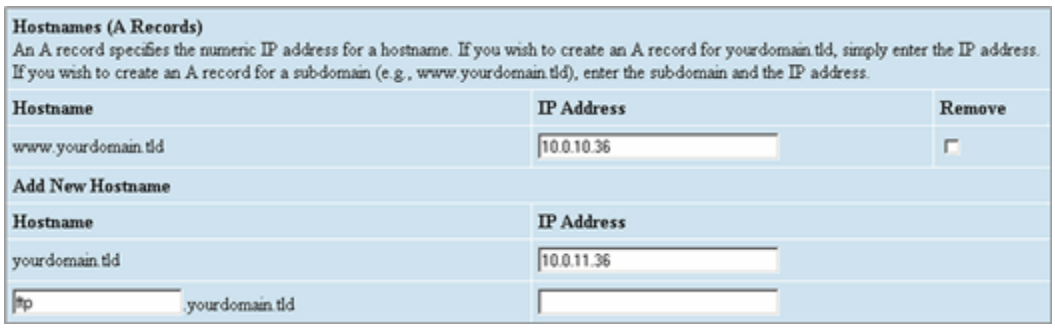


6. In the **DNS Service Data** section, at the bottom of the page, click **Zone Management**.
   The **Zone Management** page for that domain opens.
7. Use the fields and checkboxes to update the information in the **Zone Management** page.
   See below for a description of the fields and options.
8. Click **Update Zone Settings**.

Note: When adding or updating information for the record types described below, the '*' wildcard can be used. See "The Default Zone Template" for more information.

Hostnames (A records)

The hostname translates the domain name into the IP address that is used to access that domain.



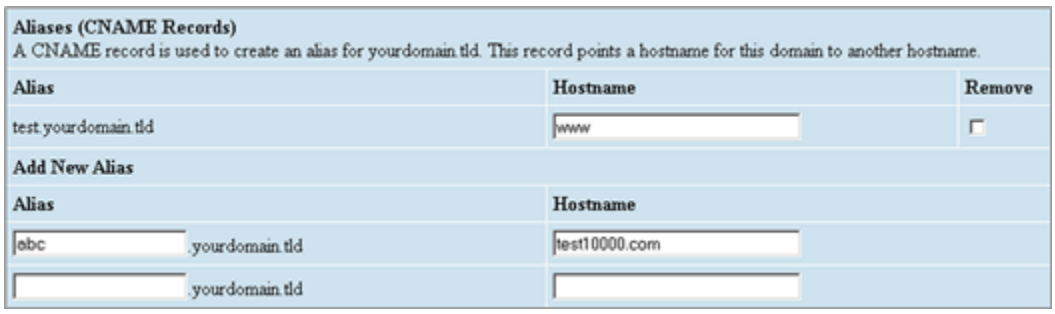
You can specify a Hostname (optional) and an IP Address for each A record that you want to add or change.

Hostname—This setting is optional as it is automatically populated with the domain name for which the Managed DNS service was ordered. You can add a hostname prefix, for example, **www** or **ftp**.

IP Address—Type the IP address in the corresponding field in this column.

Aliases (CNAME records)

An alias can be used when you want a subdomain to point to a computer outside of your domain.



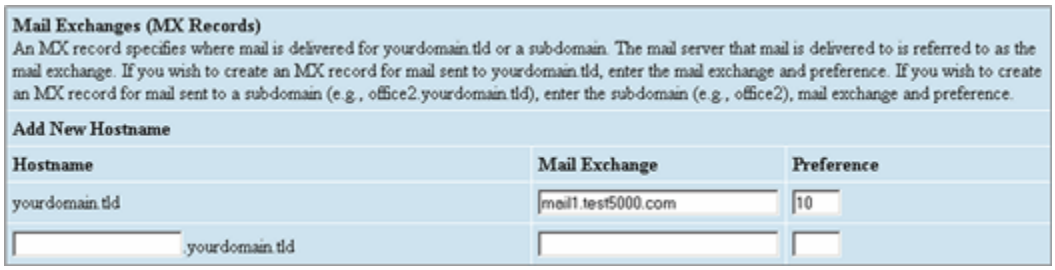
You can specify the Alias and a Hostname for each alias record that you want to add or change.

Alias—Type the third level of the domain name in this column to specify the subdomain (the domain that will redirect to another computer). Do not enter the full domain name; the first and second levels of the domain name are automatically added.

Hostname—In this column, type the FQDN of the domain that you want to access using a subdomain.

Mail Exchanges (MX records)

MX records determine how mail is delivered to your domain.

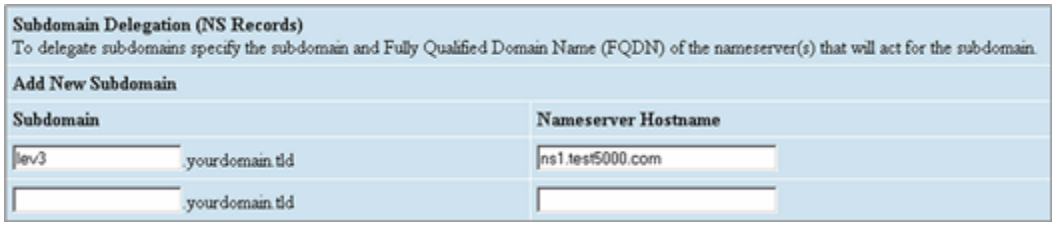


You can add a **Hostname** (optional), a **Mail Exchange** (the domain name of the mail server), and the **Preference** number for that mail server for each mail exchange record that you want to add or change.

- **Hostname**—The hostname setting is optional as it is automatically populated with the domain name for which Managed DNS service is enabled. You can, however, add a hostname prefix or a third level of that domain name.
- **Mail Exchange**—Type the FQDN of the mail server in this column.
- **Preference**—Enter a number in this column to determine the mail server priority.

Subdomain Delegation (NS records)

Subdomain delegation enables you to specify a nameserver for any of your subdomains.



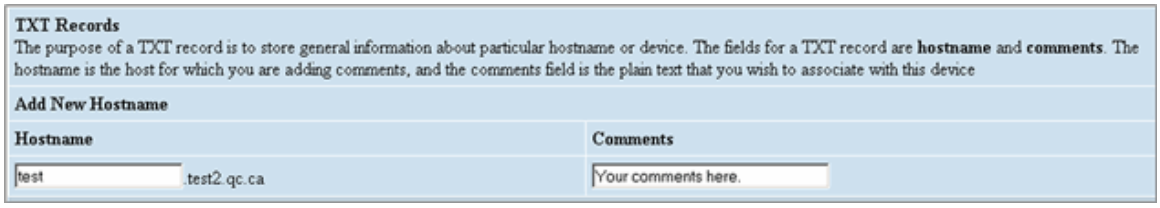
You can specify a **Subdomain** and the **Nameserver Hostname** (the FQDN of the nameserver) for each subdomain delegation record that you want to add or change.

- **Subdomain**—Enter the third level of the domain name.

- **Nameserver Hostname**—Type the FQDN of the nameserver in this column.

TXT Records

A TXT record allows you to attach comments to a hostname or device.



TXT records may be used to validate that email is being sent from the IP address of the domain's mail server, and not from a server spoofing the domain name to spread spam, viruses, or other email threats. This email-verification technique is used by Sender Policy Framework, Sender ID Framework, and Domain Keys Framework.

- **Hostname**—The hostname setting is optional as it is automatically populated with the domain name for which the Managed DNS service is ordered. You can, however, add a hostname prefix or a third level of that domain name.
- **Comments**—Enter your comments here, maximum 254 characters.

Retrieving Zone Information

Follow these steps to retrieve the zone information for a domain with another DNS provider. Not all records may be available for retrieval; therefore this process does not guarantee results.

To retrieve zone information

1. Find the service sold for the domain whose zone settings you want to retrieve.
   Follow steps 1-5 of "Changing Zone Settings for a Specific Domain", if necessary.
2. In the **DNS Service Data** section, located at the bottom of the page, click the domain whose zone settings you want to retrieve.
   The **Zone Management** page for that domain opens.
3. Scroll down the **Zone Management** page to the **Retrieve Zone Information** section.
4. To replace the existing zone settings with those that you'll retrieve, click the **Delete All Current Zone Records** checkbox. To retrieve the zone information but not replace any settings that you may have already entered, make sure the checkbox is not selected.
5. Click **Retrieve**.
   If available, the settings for that zone are returned. If unavailable, a "Zone retrieval failed" message is returned.

Resetting a Domain's Zone to use Default Settings

Follow these steps to replace a domain’s DNS information with your default zone settings (your template settings).

Note: Once you replace the existing settings with your default settings, the previous settings cannot be retrieved.

To reset a domain's zone to use default settings

1. Find the service sold for the domain whose zone settings you want to retrieve. Follow steps 1-5 of "Changing Zone Settings for a Specific Domain", if necessary.
2. In the **DNS Service Data** section, located at the bottom of the page, click the domain whose zone settings you want to retrieve.
   The **Zone Management** page for that domain opens.
3. Scroll down the **Zone Management** page to the **Restore Current Default Zone Settings** section.
4. Click the **Reset (all) Zone Defaults** button.

Managing Domain Forwarding

Activating Domain Forwarding or Using a Template Page

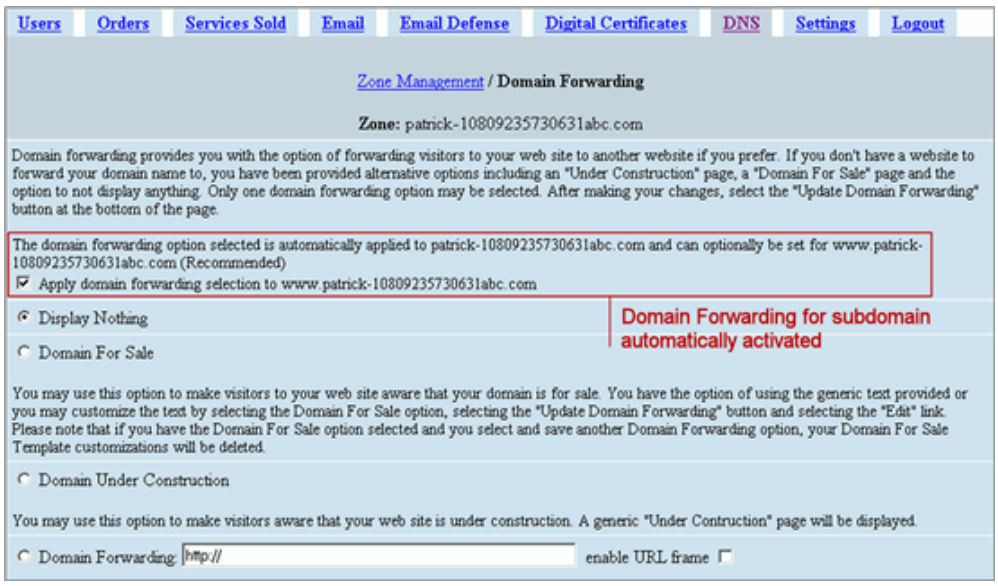
The domain forwarding and web page template settings determine what happens when users visit a domain provisioned with Managed DNS. By default, these options are deactivated, but you can activate a "domain under construction" page, a "domain for sale" page, or the domain forwarding feature for any of your customers' domains.

Note:

- Whenever you activate domain forwarding for a primary domain, it is also applied to any existing subdomains of that domain. You can, however, deactivate domain forwarding for individual subdomains (see step 7 below).
- When a domain or subdomain is forwarded, the Registry's zone record shows an OpenSRS IP address, not the address of the domain to which the URL is being forwarded.

To specify domain forwarding or use a template page, you need to search for Managed DNS for that domain as a service sold; that is, the Managed DNS order for that domain must be processed and completed.

1. Click the **DNS** tab.
2. In the **Services Sold** section, click **Active**.
   The **Search Services Sold** page opens.
3. Use the fields in the search form to define your search.
   All fields are optional; however, more information returns more precise results.
4. Click the **Search Services Sold** button.
   Services sold that match your search criteria are returned at the bottom of the page.
5. In the **Service Sold ID** column, click the ID number for the domain whose settings you want to change. You can check the domains in the **Description** column to help identify the domain that you want to update.
   The **View Service Sold** page opens.
6. In the **DNS Service Data** section, click **Domain Forwarding**. The **Domain Forwarding** page opens.



7. In the **Domain Forwarding** section, choose one of the four settings:
   - **Display Nothing**—activates a template page indicating that the domain could not be found.

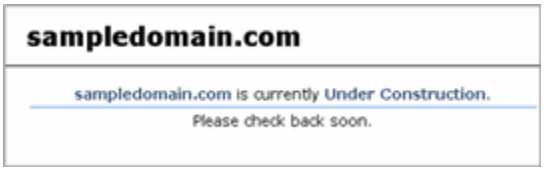
     

   - **Domain For Sale**—activates a template page indicating that the domain is for sale.

     To customize the content of this page: click **Domain For Sale**, then click **Update Domain Forwarding** at the bottom of the page to save the setting. An edit link appears beside the **Domain For Sale** option. Click **edit**, and enter your content in the **"Domain For Sale" Page Customization** page. You can enter up to 255 characters in the **Heading** field, and up to 3999 characters in the **Description** field. These fields accept either text or HTML. If you provide HTML, it is added within the page's existing HTML. Your HTML must be valid in order for the page to work. When done customizing this page, click **Update**.

- **Domain Under Construction**—activates a template page indicating that the domain is under construction.



- **Domain Forwarding**—enter the domain to which you'd like to redirect visitors. To have your domain displayed in the browser's address bar, regardless of whatever links a user may click from within your site, click the **enable URL frame** checkbox.

8. When done specifying domain forwarding or template settings, click **Update Domain Forwarding**.

Activating Subdomain Forwarding

Subdomain forwarding enables you to redirect one of your subdomains to another domain. For example, you can use subdomain forwarding to redirect SUBDOMAIN.MYDOMAIN.COM to EXAMPLE.COM.

Note: When a domain or subdomain is forwarded, the Registry's zone record show an OpenSRS IP address, not the address of the domain to which the URL is being forwarded.

In order to activate subdomain forwarding, you need to search for Managed DNS for that domain as a service sold, that is, the Managed DNS order item for that domain must be processed and completed.

To activate subdomain forwarding

1. Find the service sold for the domain for which you want to activate subdomain forwarding.
   Follow steps 1-5 of "Activating Domain Forwarding or Using a Template Page", if necessary.
2. In the **DNS Service Data** section, located at the bottom of the page, click **Domain Forwarding**.
   The **Domain Forwarding** page opens.
3. Scroll down the page to the **Subdomain Forwarding** section, and in the **Subdomain** field, enter the third level of your domain name to specify the subdomain; do not enter a period or the second or first level of your domain name.
   Note: The '*' wildcard can be used here.
4. In the **Forward URL** field, enter the domain that you want to open when a user opens your subdomain.

5. To have your domain displayed in the browser's address bar, no matter which links a user may click from within your site, click the **URL Frame** checkbox.
6. Repeat these steps for each subdomain that you want to add. After adding each subdomain, click **Update Domain Forwarding**.

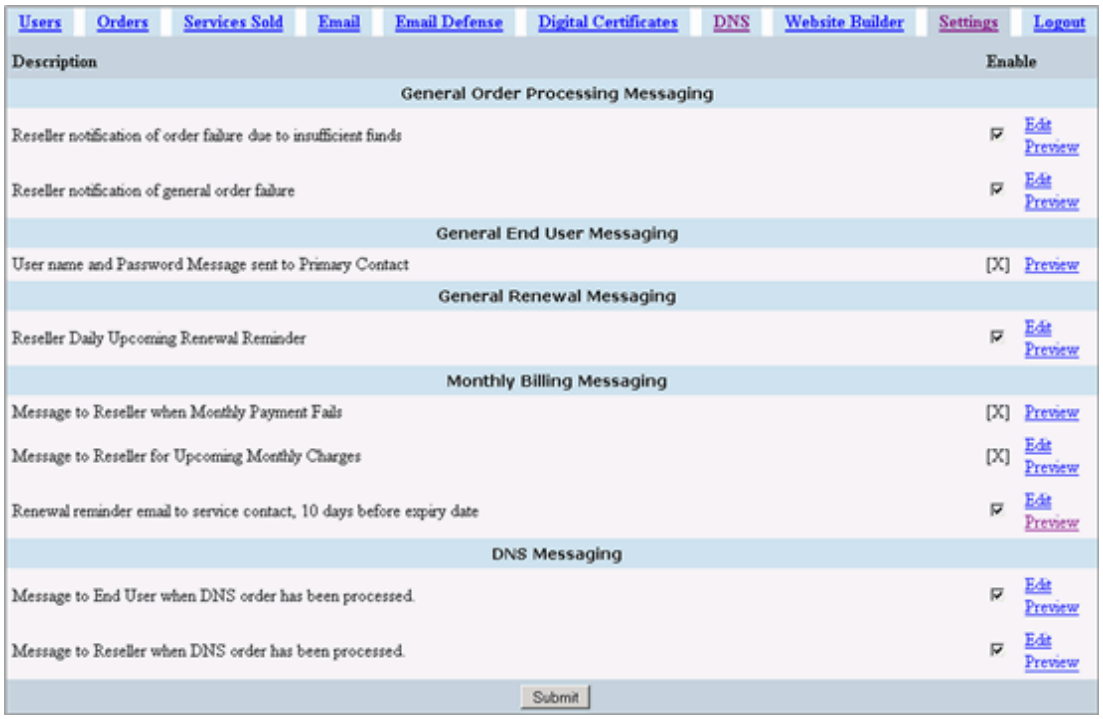
Customizing Messages and Updating Contacts

From the **Settings** tab, you can configure the email message templates that are sent to yourself and to the customer regarding various items during the order and renewal processes. In addition, you can manage all of your contacts from here.

Configuring Email Message Templates

To configure email message templates

1. Click the **Settings** tab.
2. Click **Configure E-mail Message Templates**.
   A page listing all of the message templates opens.



The following sections apply to the Managed DNS service:

- **General Order Processing Messaging** contains message templates for things that happen during the order process, and are applicable to any product; they are not specific to the Managed DNS service.
- **General End User Messaging** contains message templates for general messages that are sent to the customer and are applicable to any product; they are not specific to the Managed DNS service.

- **Monthly Billing Messaging** contains message templates for Reseller notification of payment failure, upcoming monthly charges, and a renewal reminder for expiring services.
- **DNS Messaging** contains two templates for the messages that are sent to notify the Reseller and the customer when the order has been processed; both messages can be edited or disabled.
- **Transfers Messaging** contains message templates that relate to transfers.

Note: By default, the highlighted messages are enabled.

3. To activate a message, click the **Enable** checkbox beside that message description.
4. To preview a message, click **Preview** beside the message description, and click **Back to Template List** when done.
5. To make changes to a message template, click **Edit** beside the message description. In the **Edit** page, make any required changes. Depending on the message you select for editing, certain fields are available for you to change. These fields appear in edit mode. Each field that is available for editing contains suggested place holders and/or text that you can change if necessary. The contacts that you create are useful when editing the **To**, **CC**, and **BCC** fields. See "Updating your Contact Information" for information on how to create or edit contacts.
   Note: All placeholders that are available for editing are listed on the right side of the page. To view the description of a placeholder, click the placeholder link to open a dialog box that lists the **Place Holder Name**, **Sample Value**, and **Description**.
6. Once you have made your changes, click **Save**.
   The **Preview** page opens.

   If you don’t want to save your changes, click **Cancel**. Or, if you want to return to the default values, click **Reset to Default**.
7. From the **Preview** page, click **Confirm** to keep your changes, or click **Back** to make further changes.

Updating your Contact Information

Once created, email addresses for contacts can be used to customize message templates. The following steps describe how to edit existing contacts or create new ones.

To update your contact information

1. Click the **Settings** tab.

2. Click **Manage Reseller Contacts**.
   The **Contacts** page opens.
3. **From** the **Contacts** page, edit the existing **Billing**, **Technical**, **Bounce**, or **DNS** contacts, or create a new contact.

   To edit one of the existing contacts: click **Edit**. The **View Contact Details** page opens. Make changes to any of the contact fields presented, and click **Save** to accept your changes or **Reset** to restore the original information.

   To create a new contact: click **New**. The **Create Contact** page opens. Fill in all of the contact information requested, and click **Create Contact**.
4. Click **Save Changes**.

Cancelling, Suspending, and Reactivating the Managed DNS Service

Cancelling the DNS service for one of your customers permanently deletes it; you cannot automatically reactivate that service at a later date, but you can reorder the service.

Suspending DNS service stops zone information from being published to the Managed DNS nameservers, causing the domain zone records to no longer resolve. Zone record management, domain forwarding settings, and customer management permissions are not available through the RWI 2, API, or DNS PMI.

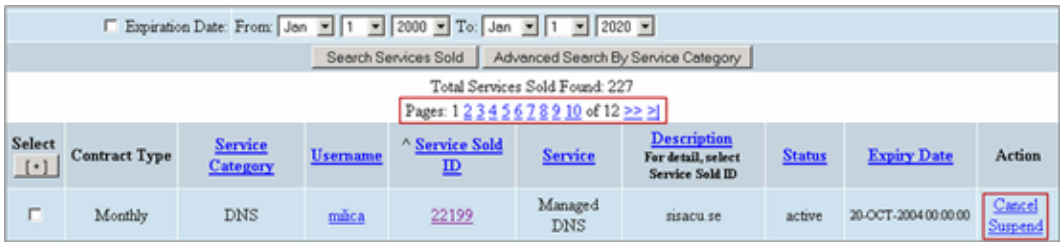
Suspended services can be reactivated at any time; all zone information, domain forwarding settings, and domain forwarding permissions are retained so that, if the service is reactivated, the zone can be republished to the nameservers. Zone information, domain forwarding settings and customer management permissions are retained until the zone is cancelled.

Reactivating a suspended DNS service republishes the zone information to the nameservers and re-enables zone management through the RWI 2, API, and DNS PMI.

Cancelling or Suspending DNS Service

To cancel or suspend DNS service

1. Click the **DNS** tab, then click the **Search DNS Services Sold** link.
   The **Search Services Sold** page opens.
2. From the **Status** list, choose a status that reflects the change that you want to make to the service.
   For example, to cancel an active service, choose **Active**. Use the remaining fields and drop-down lists to refine your search. All fields are optional; however, more criteria generates more precise results.
3. Click **Search Services Sold**.
   The search results are returned at the bottom of the page.
4. Scroll through the list and check the domains in the **Description** column to identify the domain for which you want to cancel or suspend the DNS service.



5. Click **Cancel** or **Suspend** in the **Action** column.

Reactivating Suspended DNS Service

To reactivate suspended DNS service, follow the steps in "Cancelling or Suspending DNS Service", but in step 5 click **Reactivate**.

Exceptions to Real Time Processing

Orders for the Managed DNS, including transfer orders, are processed in real-time, whenever possible. If the provider for a particular service is temporarily unavailable, the system monitors and may resubmit that request until the order completes; that order item is not put in pending state.

Order items that have been processed asynchronously (processed after a short delay) are listed in a queue summary so that Resellers can review processed queued items, and determine if follow-up with their customer is needed. Once Resellers have resolved any issues for an item, they can acknowledge the item to remove it from the list of queued items. Items that have been removed from the queue summary can always be retrieved using the RWI 2 by querying the queue history.

Note: Asynchronous processing happens very rarely. In most cases, orders are processed when submitted.

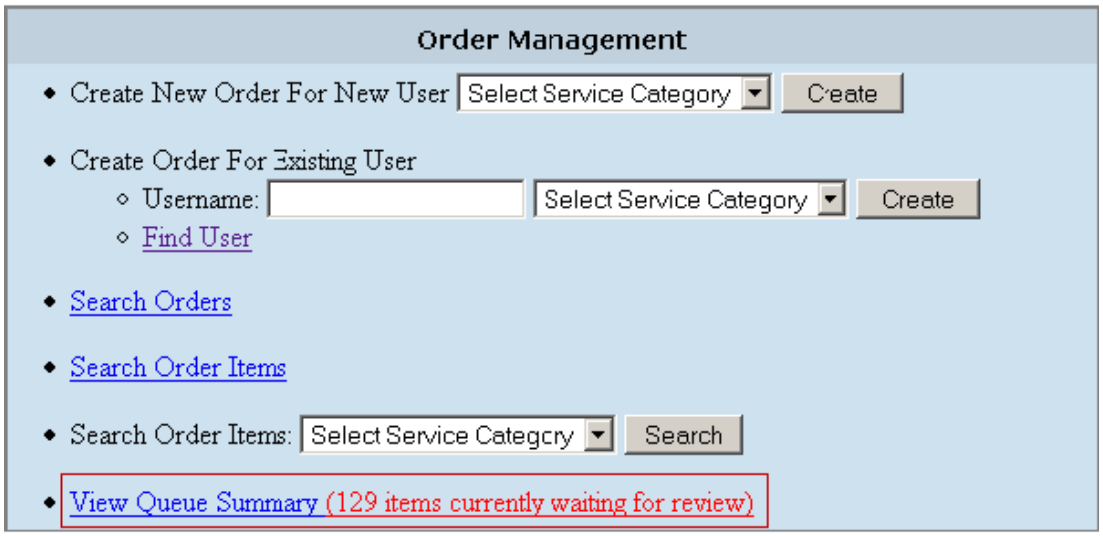
Viewing and Acknowledging Queued Items

Items that were processed asynchronously are placed in a queue, and listed on the **Queue Summary** page in the RWI 2. You can access the queue summary from either the **Services Sold Management** page, or the **Order Management** page.

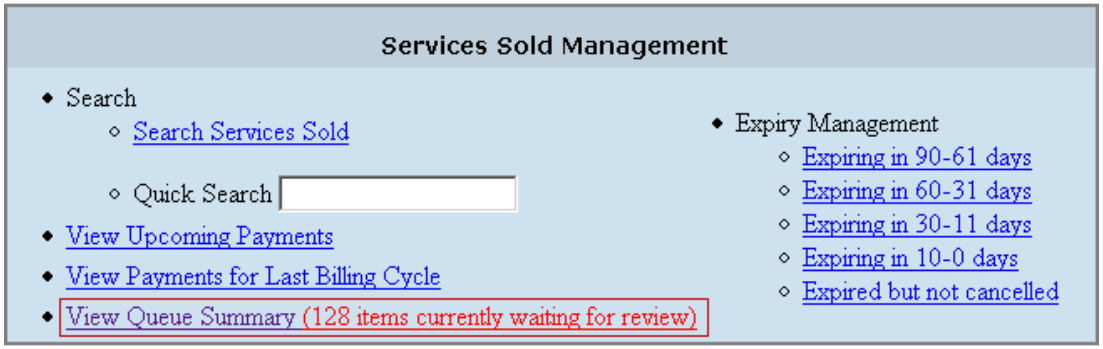
The queue summary is intended to help Resellers manage the asynchronously processed order items that require action. If you've taken action on an order item, for example, contacted the customer, you can acknowledge it, which removes it from the queue summary.

To view and acknowledge queued items:

1. In the **RWI 2**, click either the **Orders** tab or the **Services Sold** tab.

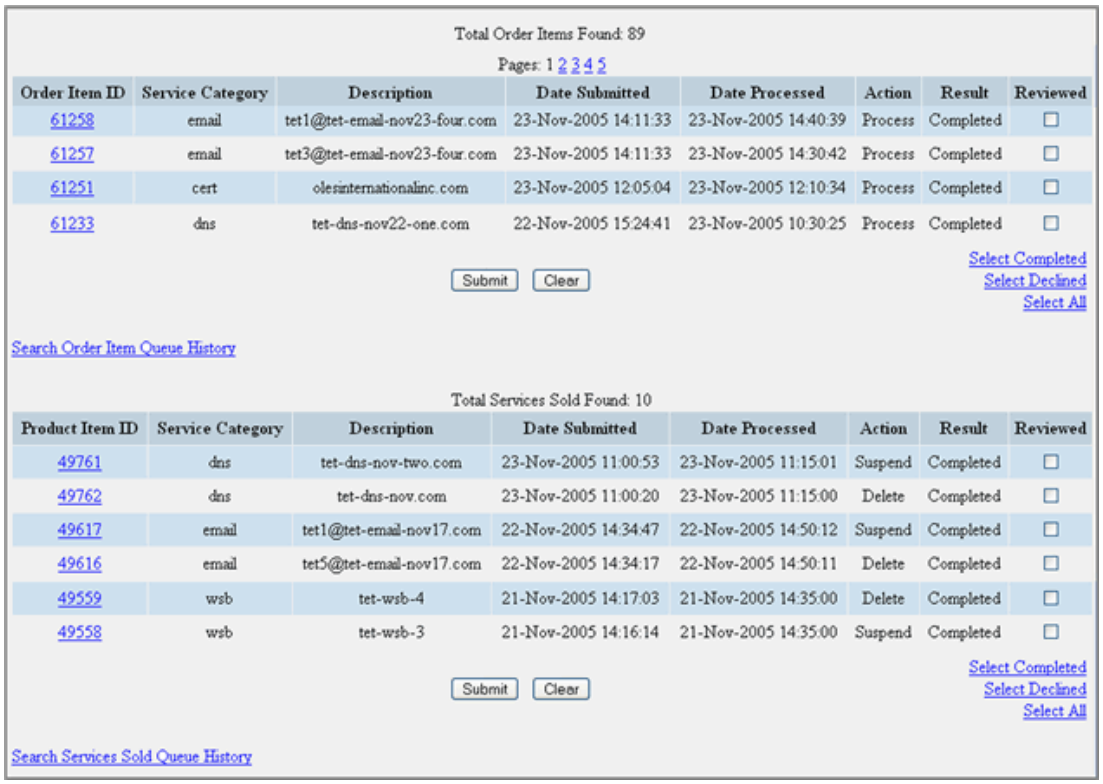


or



If you have asynchronously processed order items that you have not acknowledged, and if you have not changed the default queue summary settings, the number of items in the queue is shown in red text.

2. Click the **View Queue Summary** link.
   The summary page opens, listing queued items in two groups: **Total Order Items Found** and **Total Services Sold Found**.



Total Order Items Found: 89

Pages: 1 2 3 4 5

Order Item ID	Service Category	Description	Date Submitted	Date Processed	Action	Result	Reviewed
61258	email	tet1@tet-email-nov23-four.com	23-Nov-2005 14:11:33	23-Nov-2005 14:40:39	Process	Completed	☐
61257	email	tet3@tet-email-nov23-four.com	23-Nov-2005 14:11:33	23-Nov-2005 14:30:42	Process	Completed	☐
61251	cert	olesinternationalinc.com	23-Nov-2005 12:05:04	23-Nov-2005 12:10:34	Process	Completed	☐
61233	dns	tet-dns-nov22-one.com	22-Nov-2005 15:24:41	23-Nov-2005 10:30:25	Process	Completed	☐

Submit Clear

Select Completed
Select Declined
Select All

Search Order Item Queue History

Total Services Sold Found: 10

Product Item ID	Service Category	Description	Date Submitted	Date Processed	Action	Result	Reviewed
49761	dns	tet-dns-nov-two.com	23-Nov-2005 11:00:53	23-Nov-2005 11:15:01	Suspend	Completed	☐
49762	dns	tet-dns-nov.com	23-Nov-2005 11:00:20	23-Nov-2005 11:15:00	Delete	Completed	☐
49617	email	tet1@tet-email-nov17.com	22-Nov-2005 14:34:47	22-Nov-2005 14:50:12	Suspend	Completed	☐
49616	email	tet5@tet-email-nov17.com	22-Nov-2005 14:34:17	22-Nov-2005 14:50:11	Delete	Completed	☐
49559	wsb	tet-wsb-4	21-Nov-2005 14:17:03	21-Nov-2005 14:35:00	Delete	Completed	☐
49558	wsb	tet-wsb-3	21-Nov-2005 14:16:14	21-Nov-2005 14:35:00	Suspend	Completed	☐

Submit Clear

Select Completed
Select Declined
Select All

Search Services Sold Queue History

To view the details of a particular item: click the ID number for that item in the **Order Item ID** column or the **Product Item ID** column.

3. Look in the **Description** column to locate the item that you want to acknowledge, then click the checkbox for that item in the **Reviewed** column. Repeat to acknowledge multiple items.

4. Click **Submit**.
   The page reloads, and the acknowledged items are removed from the list.

Finding Previously Acknowledged Items

To find previously acknowledged items

1. In the RWI 2, click either the **Orders** tab or the **Services Sold** tab.
   The **Order Management** page or the **Services Sold Management** page opens. If you have asynchronously processed order items that you have not yet acknowledged, and if you have not changed the default settings for the queue summary, the number of items in the queue is shown in red text.
2. Click the **View Queue Summary** link.
   The summary page opens, listing queued items in two groups: **Total Order Items Found** and **Total Services Sold Found**.
3. Click the **Search Order Item Queue History** or the **Search Services Sold Queue History** link.
   The **Search Order Items Queue History** page or the **Search Services Sold Queue History** page opens.
4. Use the fields and drop-down lists to refine your search. All fields are optional; however, more information returns more precise results.
5. Click **Search Queue History**.
   The page reloads, and lists any reviewed (acknowledged) items.

Changing your Queue Summary Preferences

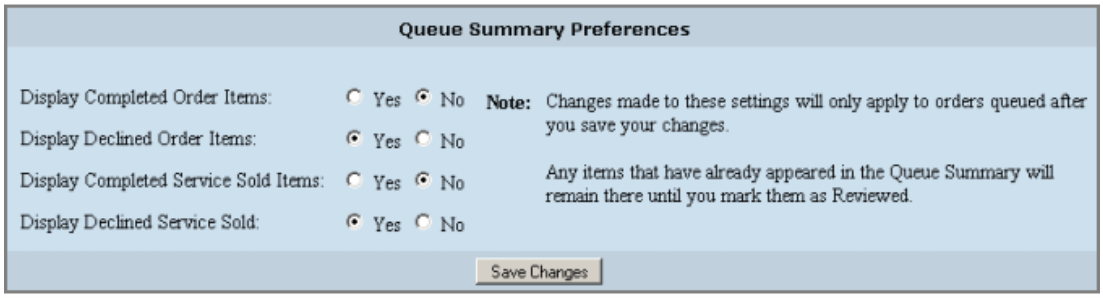
The **Queue Summary Preferences** page allows you to specify whether completed or declined items, for order items and services sold, are listed in the queue summary. By default, all asynchronously processed items are listed in the queue summary.

If you opt-out of a display setting, items of that type are automatically acknowledged.

These settings also determine whether to display the alert that appears on the **Order Management** and **Services Sold Management** pages. For example, if you set both options for services sold to **No**, the alert is not shown in the **Services Sold Management** page.

To change your queue summary preferences:

1. Click the **Settings** tab.
2. Click **Manage Queue Summary Preferences**.
   The **Queue Summary Preferences** page opens.



3. Use the radio buttons to determine which queued items to list in your queue summary.
4. Click **Save Changes**.

Renewal and Expiration Settings

Updating Renewal and Expiration Settings

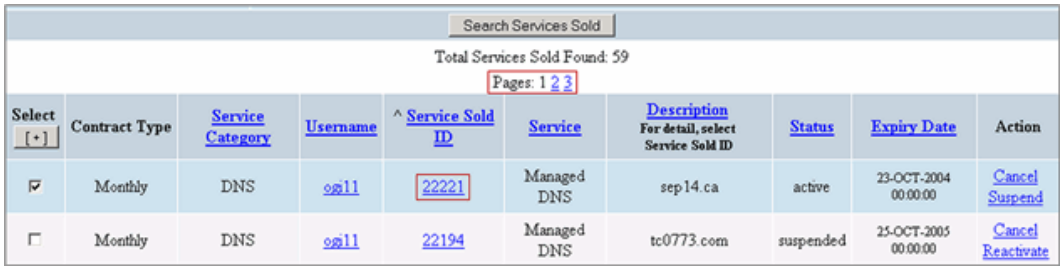
If an expiry date is set for a service, that service is cancelled on that date. Once a service has expired, you cannot reactivate it, but you can reorder it at any time.

Follow the steps below to:

- Reactivate a suspended service.
- Request a renewal reminder to notify your users when their service is about to expire.
- Assign an expiry date for a service previously set to never expire.
- Change an existing expiry date.
- Set the service to never expire.

To update renewal and expiration settings

1. Click the **DNS** tab
2. Click the **Search DNS Services Sold** link.
   The **Search Services Sold** page opens.
3. From the **Status** list, choose a status that reflects the change you want to make to the service. For example, to reactivate a suspended service, choose **Suspended**. Use the remaining fields to refine your search. All fields are optional; however, more criteria generates more precise results.
4. Click **Search Services Sold**.
   The search results are returned at the bottom of the page.
5. Scroll through the list and check the domains in the **Description** column to identify the service that you want to update. Use the links to additional pages to view all search results.



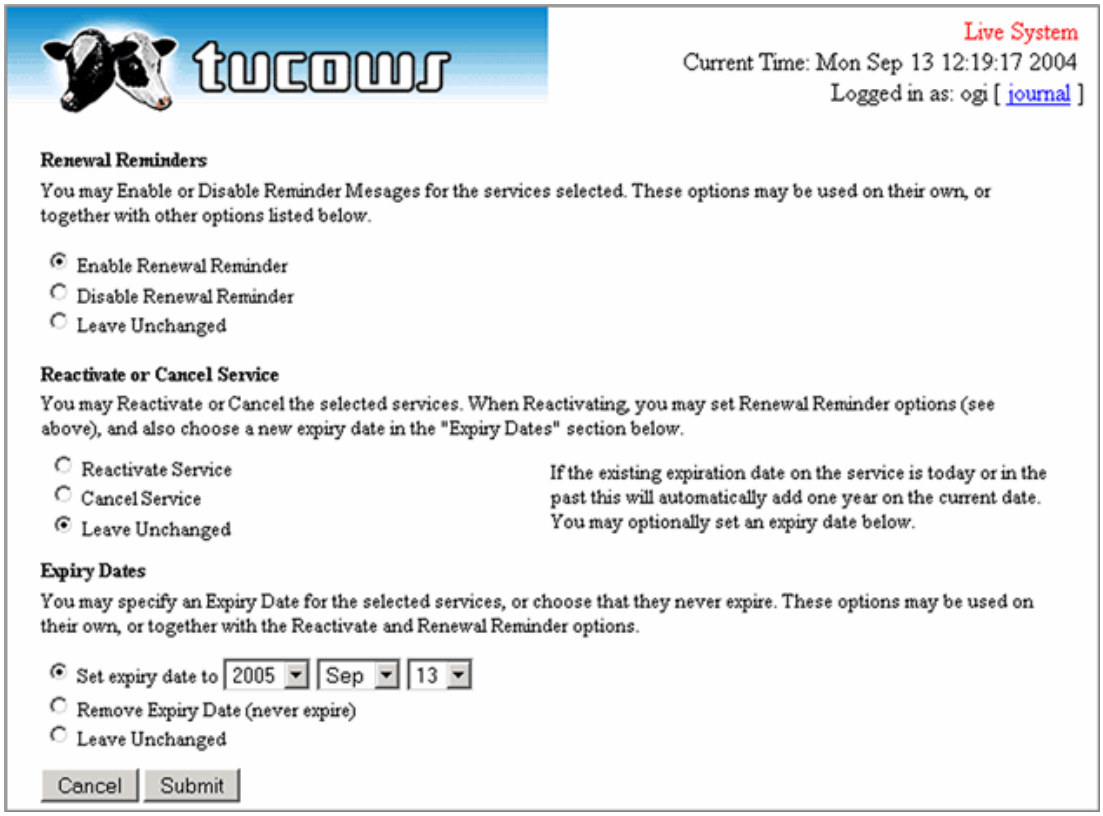
Search Services Sold

Total Services Sold Found: 59

Pages: 1 2 3

Select [+]	Contract Type	Service Category	Username	^ Service Sold ID	Service	Description For detail, select Service Sold ID	Status	Expiry Date	Action
☑	Monthly	DNS	ogi11	22221	Managed DNS	sep14.ca	active	23-OCT-2004 00:00:00	Cancel Suspend
☐	Monthly	DNS	ogi11	22194	Managed DNS	tc0773.com	suspended	25-OCT-2005 00:00:00	Cancel Reactivate

6. Once you've located the service, click the checkbox in the **Select** column to select that service.
7. Scroll down the page and click **Perform Actions**.
   A pop-up window opens, providing options for changing expiration and renewal notification settings.



8. Select options in the pop-up window to specify the new expiration and renewal reminder settings.
9. Click **Submit**.

Changing the Default Order Processing Setting

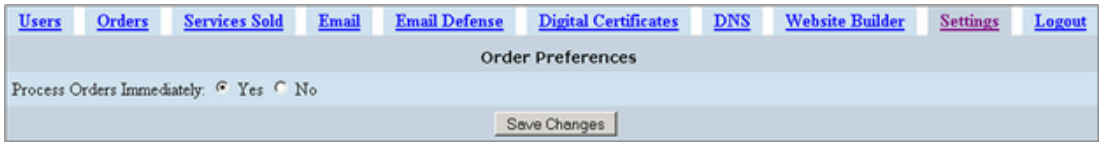
You can use the order processing setting to indicate whether your orders will be processed immediately, or saved to pending. This setting impacts orders provisioned using API commands and orders through the Reseller Client Library (RCL).

If you do not update this setting, orders are processed immediately, by default.

Note: This setting impacts orders for all RWI 2 services (DNS, Digital Certificates, Email, Email Defense, Website Builder).

To change the order processing setting:

1. Click the **Settings** tab.
2. In the **Order Preferences** area, click the **Manage Order Preferences** link.
   The **Order Preferences** page opens.



3. Select either **Yes** or **No** to determine whether orders are processed immediately.
4. Click **Save Changes**.