Charter Business Portal
Admin and User Guide

Table of Contents

Charter Business Portal (Overview)

Charter Business Portal

The Charter Business Portal is a website developed for you to manage your business services online. Below are the services you are able to manage using the Charter Business Portal:

- Voice – Manage phone line settings
- Webmail – Send and receive
- Webhosting – Manage your domain registration and web site content
- Desktop Security Suite – Obtain software keys to allow installation of Desktop Security software
- My Account – View your bill, make payments online, set up automatic bill payments
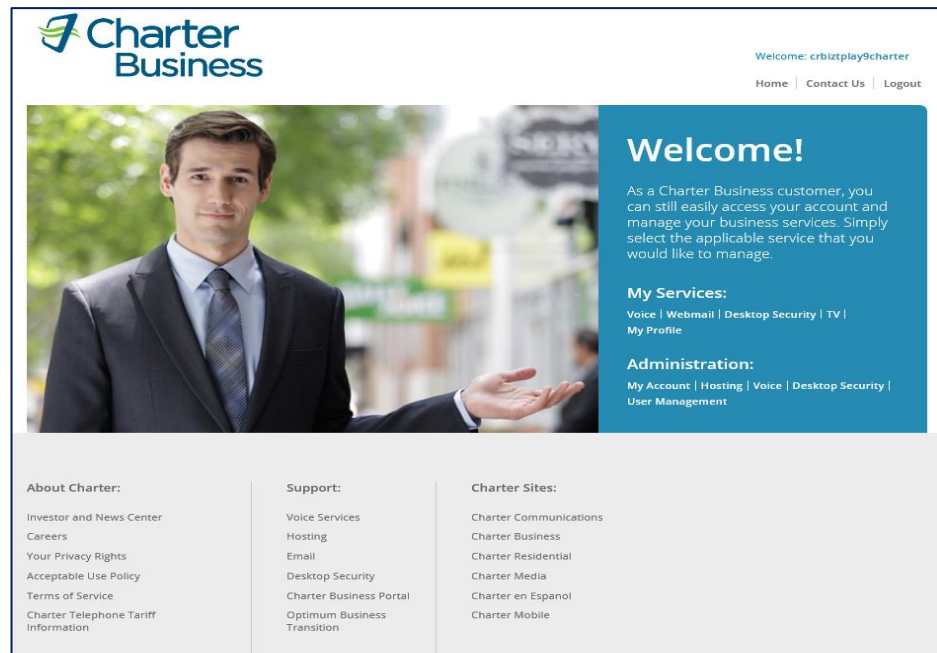
Browser Requirements

The following are minimum browser requirements:

- Internet Explorer 8 and higher
- Chrome 26 and higher
- Firefox 19 and higher
- Safari 5.06 and higher
- Mobile browsers
  - Safari on iOS
  - Android 2.3.4 native browser
  - Blackberry Webkit

Header and Footer

The Charter Business Portal has a universal header and footer to provide assistance while browsing throughout the site.

<u>Header</u>:
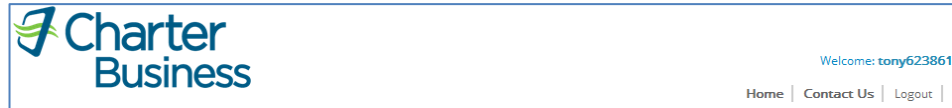
<u>Footer</u>:
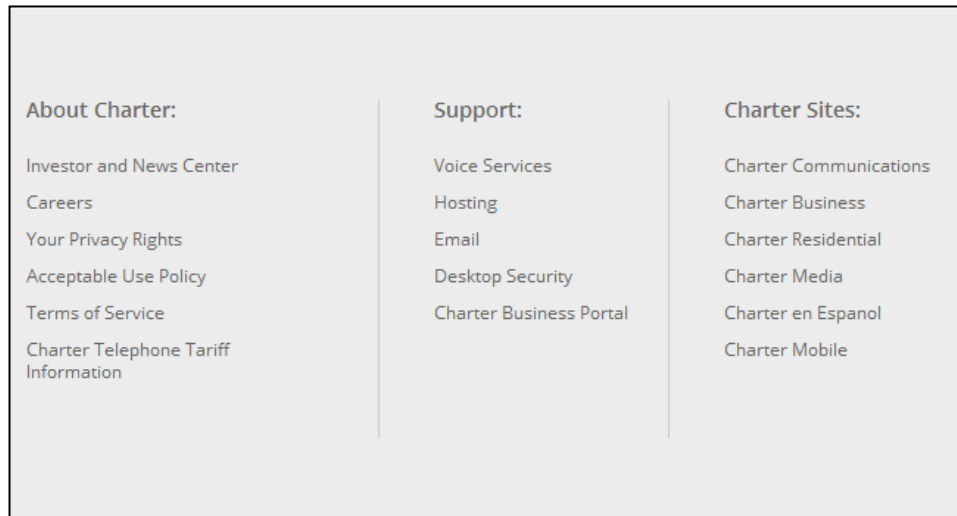
(See Appendix C for more information on the links within the footer)

Site Help

Throughout the Charter Business Portal there are various places that have help indicators 🔵. When the customer hovers over these help indicators information is provided to assist with the respective field or section. See below for an example.

Please choose a question from the list that will be asked of you when resetting passwords, getting your username, or calling Charter Business Customer Care. This question and associated answer will be the shared secret between Charter and the user.
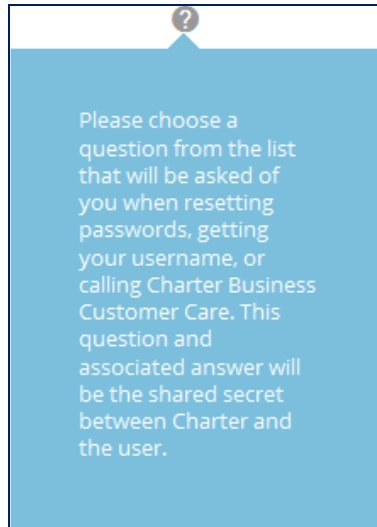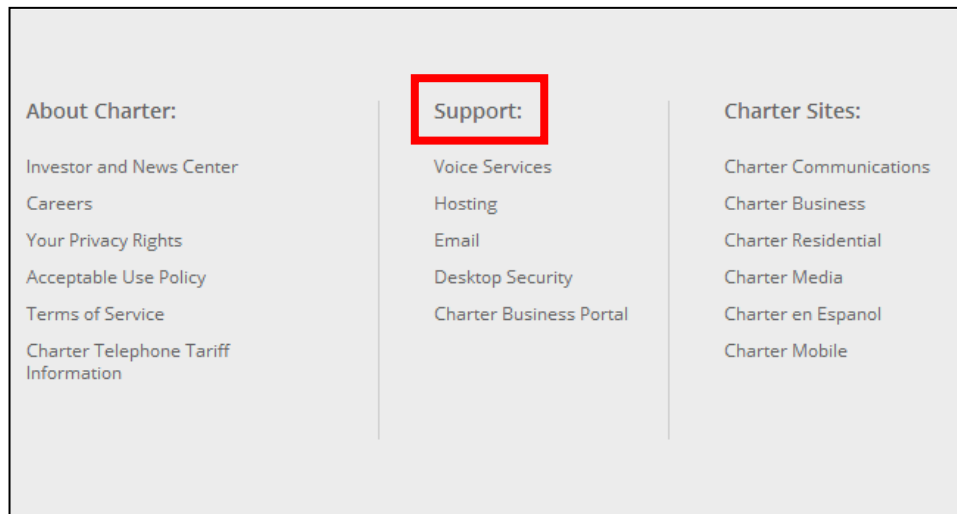
Support Page

The Charter Business Portal Support Page provides resources for using the Charter Business Portal and for managing your Charter Business Services. The Support Page can be accessed by clicking "Support" on the footer.

About Charter:

Investor and News Center

Careers

Your Privacy Rights

Acceptable Use Policy

Terms of Service

Charter Telephone Tariff Information

Support:

Voice Services

Hosting

Email

Desktop Security

Charter Business Portal

Charter Sites:

Charter Communications

Charter Business

Charter Residential

Charter Media

Charter en Espanol

Charter Mobile

Charter Business

Support

Customer Care

Contact Customer Care:

877.747.3669

Support Information

Voice:

Administrator Guide

Group Administrator User Guide
Hunting and Hunt Group Voicemail Quick Reference Guide
Group Voice Portal Administrator Guide

User Guide

Online Control Panel Getting Started Guide
Online Control Panel User Guide
Individual Line Voicemail Quick Reference Guide
Feature Access Code User Guide
Call Manager Quick Reference Guide

Hosting:

Hosting Help

Email:

Email Help

Desktop Security:

Admin Guide

User Guide

Charter Business Portal:

Admin and User Guide

Charter Business Portal (First Time Users / Pre-Registration)

First Time Users / Pre-Registration

In order to use the Charter Business Portal, you must first create a username.

1. Browse to the Charter Business Portal

2. Select "Register"

3.

4. To create a new Charter Business ID follow the instructions below:
   - ➤ Enter the Charter Business Account #
   - ➤ Enter the Billing Zip Code
   - ➤ Enter the MAC Address associated with the account
     - • <u>Internet Only Customers</u> – Use the MAC address of the internet modem
     - • <u>Telephone Only Customers</u> – Use the MAC address of the telephone modem
     - • <u>Internet and Telephone Customers</u> – Use the MAC address of the internet modem
     - • <u>TV Only</u> – Use the MAC address of the cable box
   - ➤ Click "Submit"

Note: If you have multiple pieces of equipment for a business service (example: two cable boxes), either one will work to validate your account. Also, if you are accessing the pre-registration pages utilizing the internet modem that is assigned to your account, then the information will automatically populate, and the Account MAC field will not be displayed.

Note: If you are at your service location and behind the accounts Modem the Microsite should automaticly populate your account information.

5. Enter a new Charter Business ID
   - ➤ Refer to Appendix B for Charter Business ID requirements
6. Enter a Password
   - ➤ Refer to Appendix B for Charter Business password requirements
7. Confirm the Password
8. **Optional**: Check the availability of the Charter Business ID by clicking "Check Availability"
9. **Optional**: Select the "Reset Password at Initial Login" this will force the user to change the password at first sign-in

10. Enter a first name in the "First Name" Field for the new user
11. Enter a last name in the "Last Name" Field for the new user
12. Enter a contact email in the "Contact Email" Field for the new user
13. Enter a contact phone in the "Contact Phone" Field for the new user

14. Choose a security question for the new user
15. Enter an answer to the security question
16. **Optional**: Select the "Reset security question and answer at initial login" this will force the user to change the security question and answer at initial login

17. Choose "Yes" for each role the new user should have.
    ➤ Refer to Appendix A for permissions that are granted with each role assignment.

Role Assignment:

❓ Primary	○ Yes	● No
❓ Hosting Admin:	○ Yes	● No
❓ Hosting User:	○ Yes	● No
❓ Network Admin:	○ Yes	● No
❓ Network User:	○ Yes	● No
❓ Billing Management:	○ Yes	● No

18. Select "I accept the Terms and Conditions" check box

19. Click "Submit"

20. A confirmation page opens stating that your registration was completed successfully.

Charter Business

Contact Us

Registration Confirmation

Your Registration was successful!

In the future use this Charter Business ID to sign
in and manage your services.

CBORTP03

Home

**First Time
Login
(Sub-user)**

Once you have completed registration, you may log in to the Charter
Business Portal to manage your services.

1. Browse to the Charter Business Portal
2. Enter the newly created Charter Business User ID and Password
   under the "Returning Users" section
3. Click "Sign In"
4. The "Confirm ID Information" page opens.
5. Review the following ID information:
   - Password
   - Security Question and Answer
   - Contact Information (First Name, Last Name, Email, Phone)
   - Terms and Conditions

6. Select the "I accept the Terms and Conditions" check box

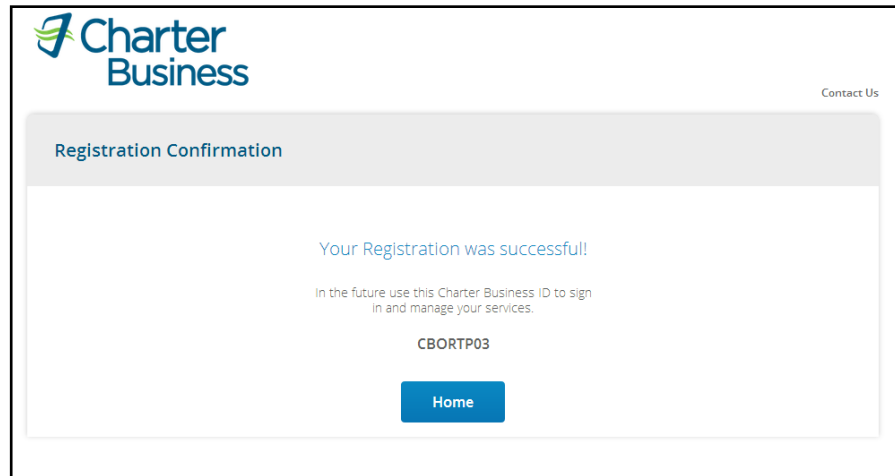**Terms and Conditions:**

Review Terms and Conditions*

option, make one or more administrative web sites available to Customer in connection with Customer's use of the Services (each an "Administrative Web Site"). Charter may furnish Customer with one or more user identifications and/or passwords for use on the Administrative Web Site. Customer shall be responsible for the confidentiality and use of such user identifications and/or passwords and shall immediately notify Charter if there has been an unauthorized release, use or other compromise of any user identification

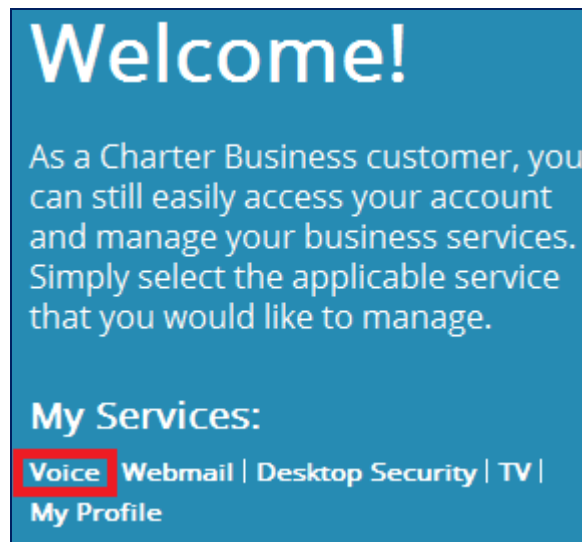☑ Accept the Terms and Conditions

7. Click "Save"

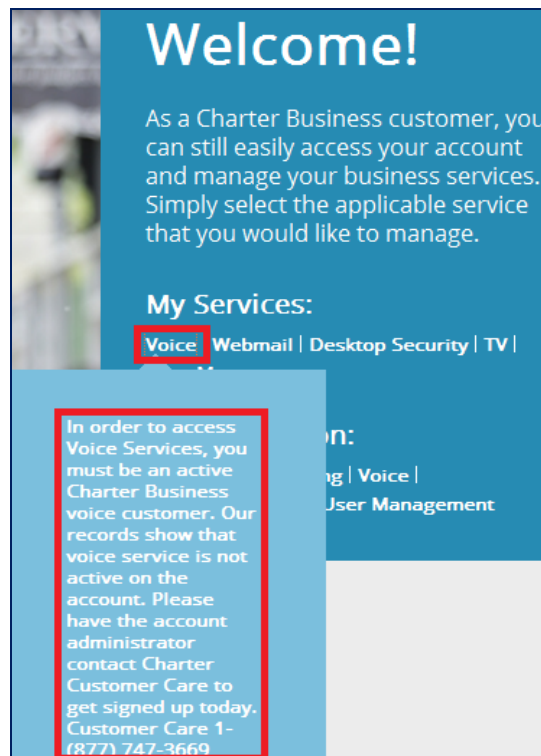## Charter Business Portal (My Services)

My Services (Voice)

If you are subscribed to voice services, the "Voice" link will be active. The link will direct you to the appropriate website / portal that maintains your current phone lines and features.

When you click "Voice", you will be directed to the Charter Online Control Panel to access your voice services.

If you are not subscribed to voice service, the below message will display when you click "Voice" under the "My Services" section.

Listed below are administrator and user guides for Charter Business Phone service.
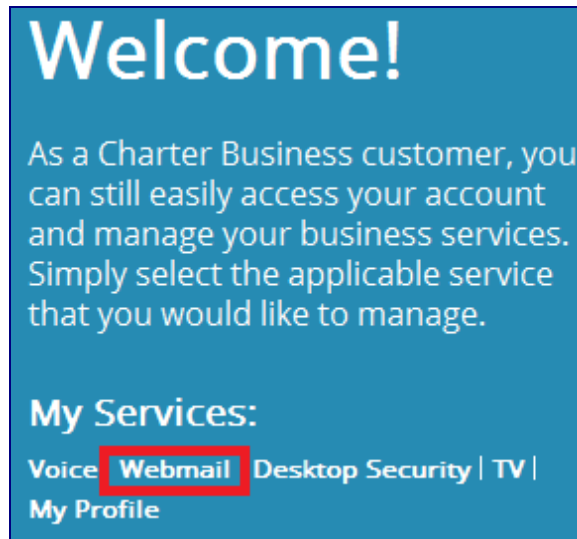
Administrator Guides

- [Group Administrator User Guide](#)
- [Hunting and Hunt Group Voicemail Quick Reference Guide](#)
- [Group Voice Portal Administrator Guide](#)

User Guides

- [Online Control Panel Getting Started Guide](#)
- [Online Control Panel User Guide](#)
- [Individual Line Voicemail Quick Reference Guide](#)
- [Feature Access Code User Guide](#)
- [Call Manager Quick Reference Guide](#)
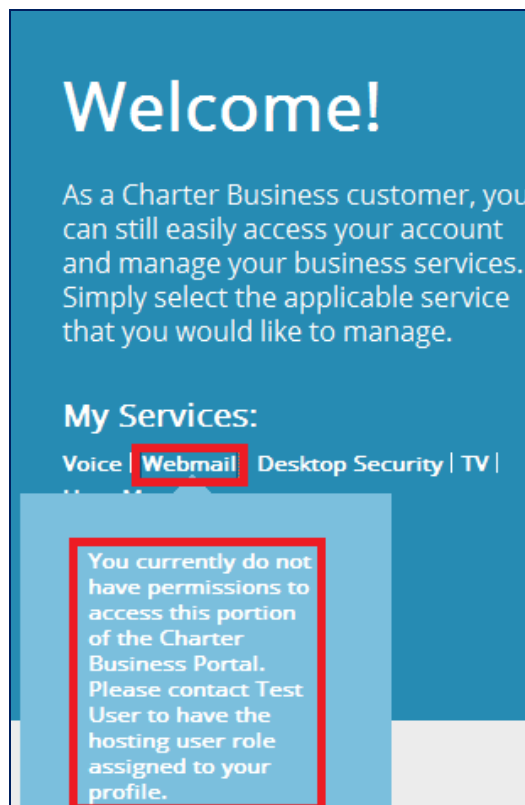

My Services (Webmail)

If you are subscribed to internet services, the "Webmail" link will be active. The link will guide you to the appropriate website / portal that maintains your Email.

In order to access this link, you will need to have one of the below roles assigned to your Charter Business ID.

- Primary User
- Hosting Administrator
- Hosting User

If you do not have the proper role assignments, the below message will display when you click "Webmail" under the "My Services" section.

If you are not subscribed to internet service, the below message will display when you click "Webmail" under the "My Services" section.
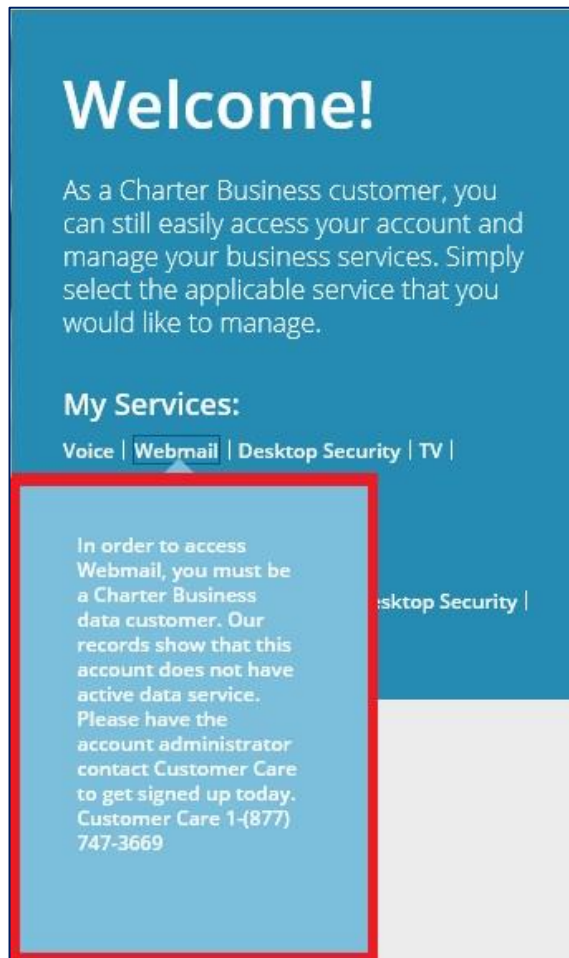

If you are subscribed to internet service and click on the "Webmail" link you will be directed to the Charter Business webmail log in screen for the user to log in to their webmail service
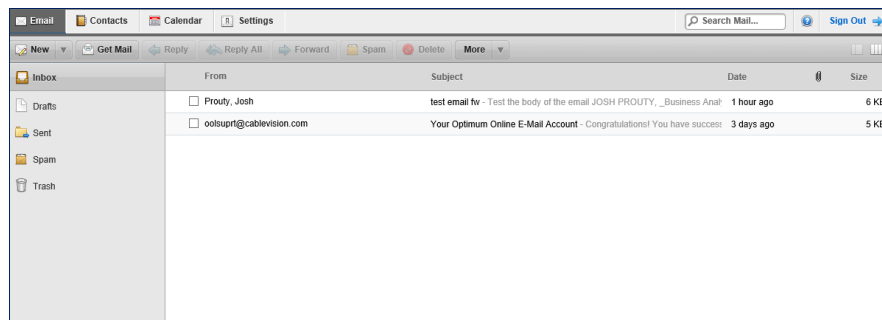
To Access Charter Business Webmail:

1. On the Charter Business Webmail login page, enter the email address and password and click "Login"

Note: Email credentials are created and provided to users by the Hosting Administrator or Primary User.

See the "Administration (Hosting)" section for instructions on how the Hosting Administrator or Primary User creates an email address.
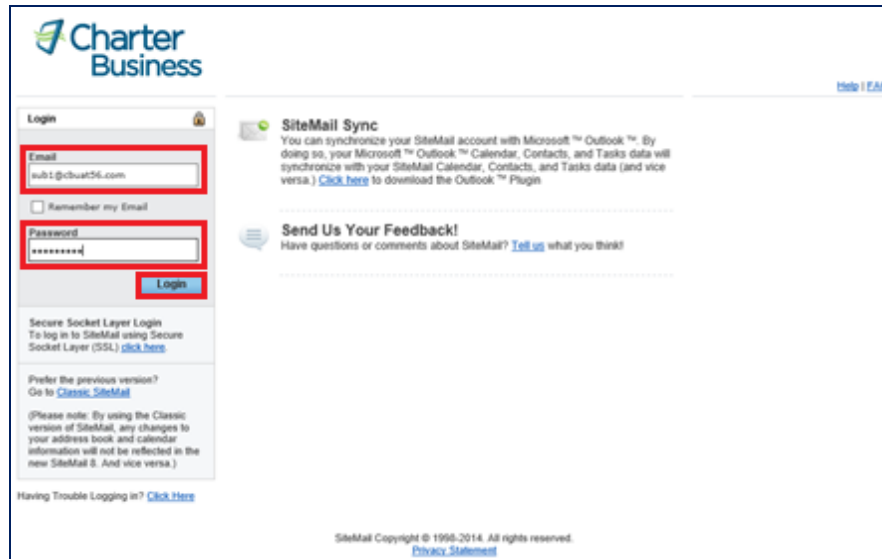
2. The Charter Business Webmail inbox opens

Below is the link to the Charter Business Webmail Guide. This and other support documents can be found on the Support Page of the Charter Business Portal.

- [Charter Business Webmail Guide](#)

For additional webmail support beyond the instructions provided within this section, please contact Hostway Technical Support, 855 381 4461.

My Services (Desktop Security)	If you are subscribed to internet service, the "Desktop Security" link will be active. The link will guide you to the Desktop Security Page to obtain the necessary information to utilize the Desktop Security Software Suite.

Proprietary and Confidential

In order to access this link, you will need to have one of the below roles assigned to your Charter Business ID.

- Primary User
- Network Administrator
- Network User

If you do not have the proper role assignments, the below message will display when you click "Desktop Security" under the "My Services" section.

If you have the proper role assignments, you will be able to view the following:

- Desktop Security Download Link (Mac)
- Desktop Security Download Link (PC)
- Uninstall Tool
- Diagnostic Utility Tool
- Online Scanner

You will need a License Key in order to download the Desktop Security Software. The Primary User or Network Admin will receive the License Key during Desktop Security Registration with F-Secure and provide the License Key to Network Users within the account (see "Administration (Desktop Security)" section for instructions).

Note: Once the Primary User or Network Admin have completed registration, the License Key will be listed on the Desktop Security page of the Charter Business Portal.

If the Primary User or Network Admin has not completed the Desktop Security Registration, you will receive the following message when you click "Desktop Security" under the "My Services" section.
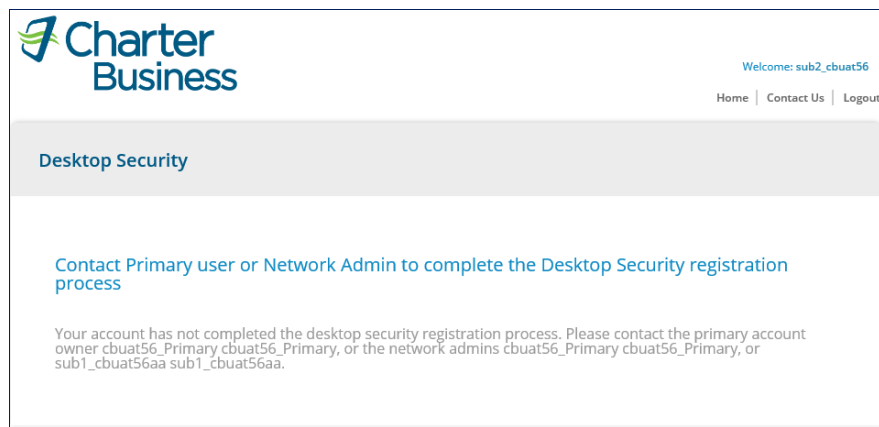
If you are not subscribed to internet service, the below message will display when you click "Desktop Security" under the "My Services" section.

Below are links to the Desktop Security User Guide and Admin Guide. These documents and other support documents can be found on the Charter Business Portal Support Page.

- [Desktop Security User Guide](#)
- [Desktop Security Admin Guide](#)

My Services (TV)

If you are subscribed to video service, the "TV" link will be active. The link will guide you to the TV Listings page, displaying your current TV Guide listing based on your service address zip code.

Welcome!

As a Charter Business customer, you can still easily access your account and manage your business services. Simply select the applicable service that you would like to manage.
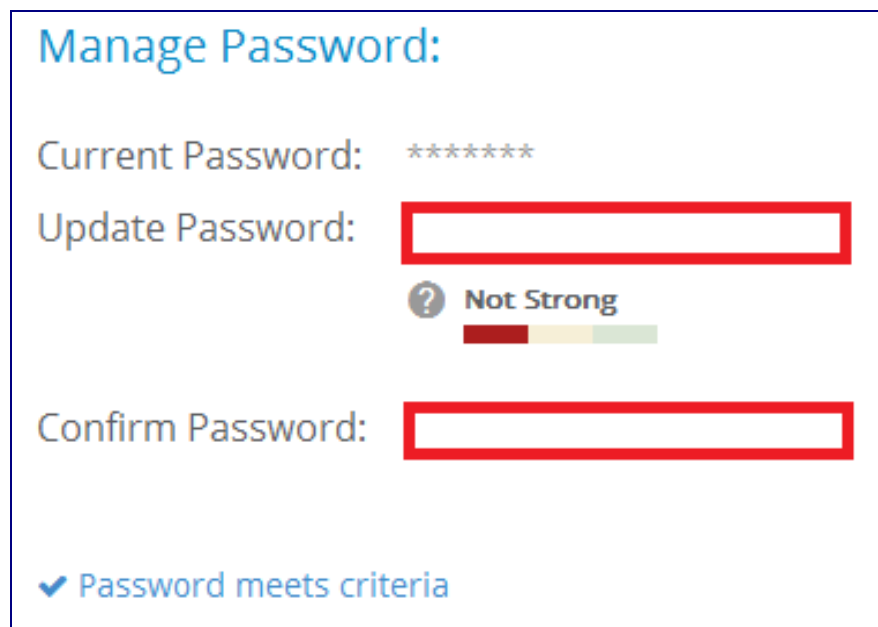
My Services:

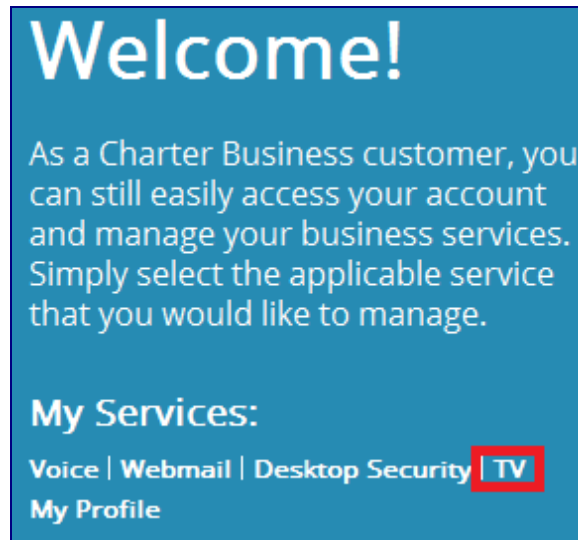Voice | Webmail | Desktop Security | TV
My Profile

1. Click "TV" under "My Services"

Note: In most markets, you will need to ensure that the correct zip code gets populated. In addition, if there are multiple "cable" options (markets) to choose from, you will need to select one to proceed. If there are not multiple options to choose from, the channel lineup will appear and you will not need to choose an option from a list.

2. **Optional**: To change the zip code clear the "ZIP or Postal Code" field and enter the desired zip code.
3. Select a "Cable" option if applicable
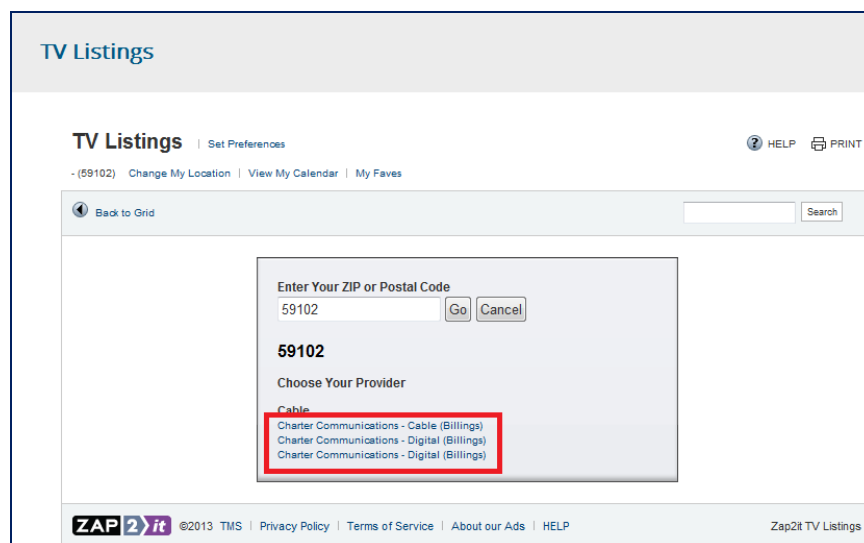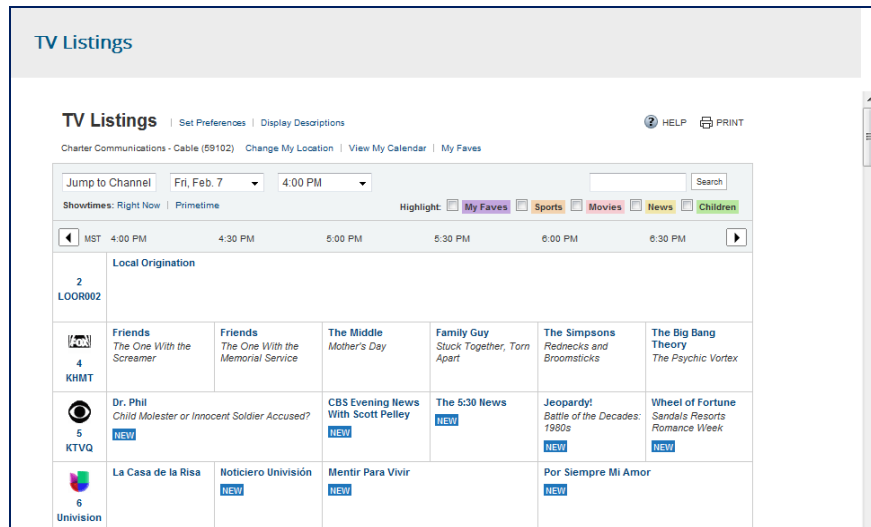
If you are not subscribed to video service, the below message will display when you click "TV" under the "My Services" section.
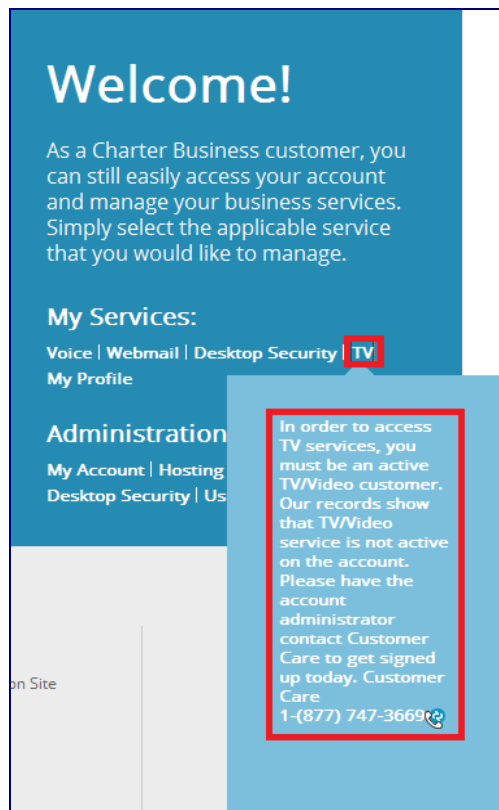
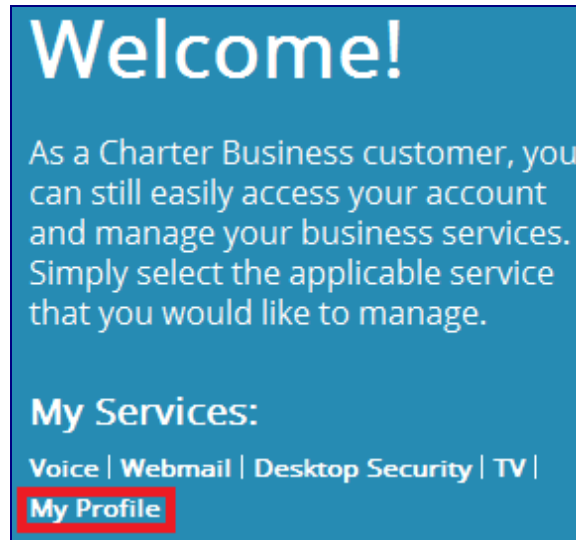| **My Services (My Profile)**	If you are subscribed to any Charter Business Line of Business, the "My Profile" link will be active. The link will guide you to the Charter Business ID

Management Page to manage the following profile items:

- ➢ Manage Password
- ➢ Security Questions
- ➢ Contact Information

Change Password (For User Currently Logged In)

1. Click "My Profile" under "My Services"
2. Enter the new desired password in the "Update Password" field
   - ➢ Refer to Appendix B for Charter Business password requirements
3. Enter the new desired password in the "Confirm Password" field

4. Click "Save" at the bottom of the page

5. A confirmation page opens stating that you have successfully edited an account. Click "OK"
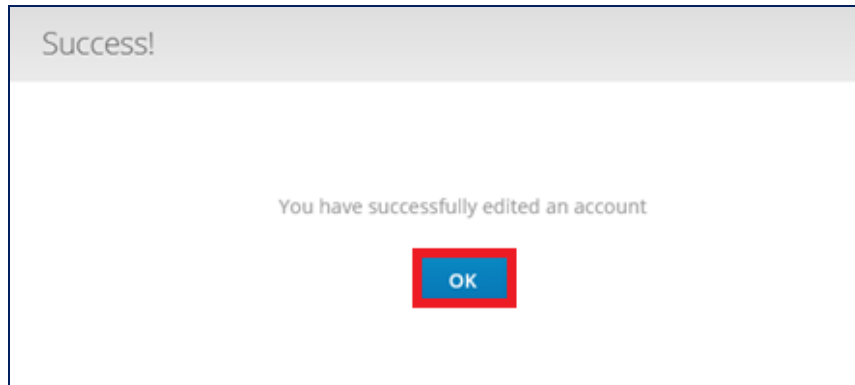
Change Security Question

1. Click "My Profile" under "My Services"
2. Click the "Security Question" drop down
3. Choose the new desired security question
4. Enter the answer to the new security question in the "Security Answer" field

5. Click "Save" at the bottom of the page

6. A confirmation page opens, stating that you have successfully edited an account. Click "OK"
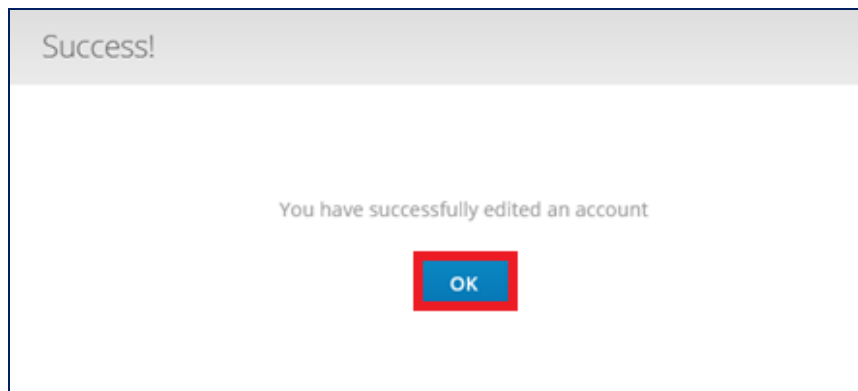
Change Contact Information

1. Click "My Profile" under "My Services"
2. Enter an updated first name in the "First Name" Field
3. Enter an updated last name in the "Last Name" Field
4. Enter an updated contact email in the "Contact Email" Field
5. Enter an updated contact phone in the "Contact Phone" Field

6. Click "Save" at the bottom of the page

7. A confirmation page opens, stating that you have successfully edited an account. Click "OK"

Success!

You have successfully edited an account

OK

Introduction   This section applies to users with the following roles: Primary User, Hosting Admin, Network Admin, and Billing Management.

Administration (My Account)   If you are subscribed to any Charter Business Line of Business, the "My Account" link will be active. The link will guide you to the appropriate website / portal that maintains current billing-pertinent information for your account.
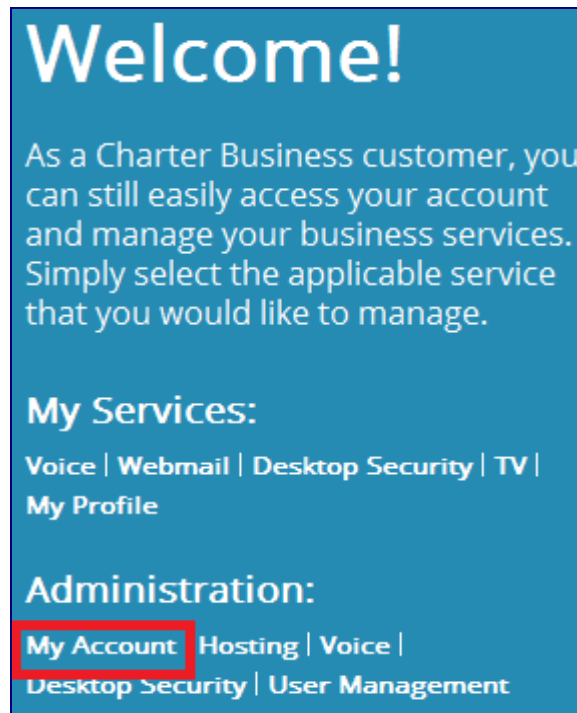
In order to access this link, you will need to have one of the below roles assigned to your Charter Business ID.

- Primary User
- Billing Management

If you do not have the proper role assignments, the below message will display when you click "My Account" under the "Administration" section.
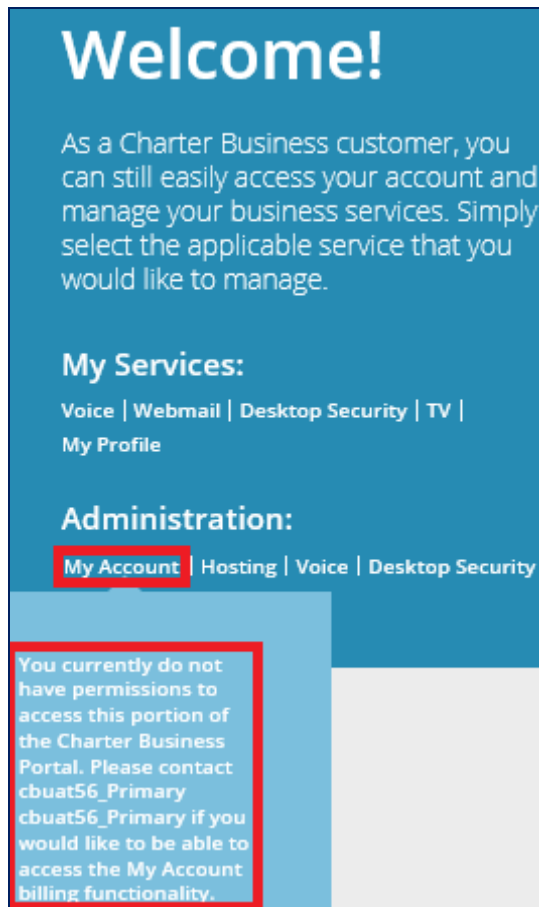
If you have the proper role assignment, you will be guided to the Charter Business Convergent Care site that will display billing-pertinent information for the entire account.

| **Administration (Hosting)** | If you are subscribed to internet service, the "Hosting" link will be active. The link will guide you to Charter Business SiteControl to manage your business website development features and email creation / maintenance for all email users. |

In order to access this link, you will need to have one of the below roles assigned to your Charter Business ID.

- Primary User
- Hosting Admin

If you do not have the proper role assignments, the below message will display when you click "Hosting" under the "Administration" section.

If you are not subscribed to internet service, the below message will display when you click "Hosting" under the "Administration" section.

If you are subscribed to internet service and have the proper role assignment, you will be securely logged into the Charter Business SiteControl when you click "Hosting" under the "Administration" section of the Charter Business Portal.

If you have not established a domain, you will be guided to a registration page to activate a domain by either creating a new one or transferring an existing one, which will then allow you access to create domain-based email addresses.

Register a New Domain:

1. Enter a domain name to register
2. Click "Continue"

3. Choose the desired top level domain (1 per internet package subscription)
4. Click "Continue"

5. On the Create an Account page, complete the following required fields:
   - First Name
   - Last Name
   - Address Line 1
   - Street
   - City
   - State

- ➢ Zip
- ➢ Phone
- ➢ Email

6. Check the boxes to agree to comply with the Terms and Conditions

7. Click "Place Order"

Place Order

8. An Order Confirmation page opens providing the domain name and web hosting information

Charter Business

Order Confirmation   print

Welcome to the Charter Business community. We're pleased to be your Web solutions provider. If you are a new customer, you will be receiving an email shortly with all the information you need to log into SiteControl and begin using all the features included in your plan. Please print a copy of this page for your records.

Your Information

Testuser Testuser
1175 Street Name
Denver, CO 80206
7205502085
cbe2etesting@gmail.com

Domain Names

DOMAIN NAME	DURATION	ADD-ONS
cbuat53.com		No add-ons selected

Sub Total: $ 0.00

Web Hosting

DOMAIN NAME	WEB HOSTING PLAN	BILLING CYCLE	QUICK INFO
cbuat53.com	Premium Bundled		12 GB, unlimited traffic, 250 email accounts

Sub Total: $ 0.00

Total Paid: $ 0.00

9. A confirmation email will be sent to the email account used during registration
10. Click the link provided in the confirmation email in order to verify the email address associated with the new account

As of January 1, 2014, the Internet Corporation for Assigned Names and Numbers (ICANN) has mandated that all ICANN accredited registrars begin verifying the WHOIS contact information for all new domain registrations and Registrant contact modifications.

You have registered one or more domains from Domain People and verification of the Registrant email address is required for these domain name(s) to remain active. Please click the link below to verify the email address. You have until 03/07/2014 to verify this email address. After this date, the domain name(s) will be suspended until the email address is verified.

Click here to verify your email address

If the above link does not work, please copy-and-paste the following URL into an open web browser to complete the verification process:

http://verify.domainpeople.com/raaverification/verification.aspx?VerificationCode=DF350C7D-81BA-4D89-AC7F-BE0D4D5081FF

Once you click the link, your email address will be instantly verified and there is nothing further for you to do on the following domains:

cbuat56.com

Sincerely,

Domain People

11. A confirmation message opens, stating that you have successfully verified the email address for the respective domain

✓ **Congratulations, you have successfully verified the Registrant email address for the following domains:**

· cbuat56.com
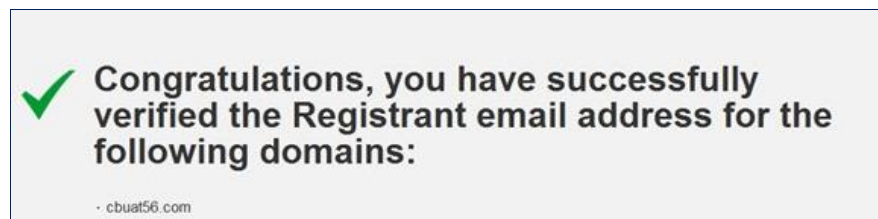
Transfer a Domain Registrar

If you have already registered a domain name elsewhere and would like to transfer the registration to the Charter Business Hosting registrar, you will first need to unlock and authorize the transfer (see the Charter Business Hosting Guide for more information).

Once the existing domain is unlocked and authorized, proceed with performing the domain transfer from the Charter Business Portal.

Note: You will be required to have your authorization code in order to complete the transfer.

1. Click "Hosting" from the "Administration" section on the Charter Business Portal home page
2. Enter your existing domain name in the "Use a name I already own" field
3. Click "Continue"

4. On the authorization page, complete the following:
   - ➢ Check the "I affirm that I am the registered owner" box
   - ➢ Check the "I'd like to transfer it to Charter Business" box
   - ➢ Enter your authorization code
   - ➢ Click "Continue"

5. At this point, you will proceed through the steps required to create an account as described in Steps 3-11 of the "Register a Domain" section above.

Create Email Addresses

Once a domain is established, the Primary or Hosting Admin is able to create additional email addresses for the new or transferred domain using Charter Business SiteControl.

1. Click the Email icon under the "Manage Services" section of the SiteControl home page
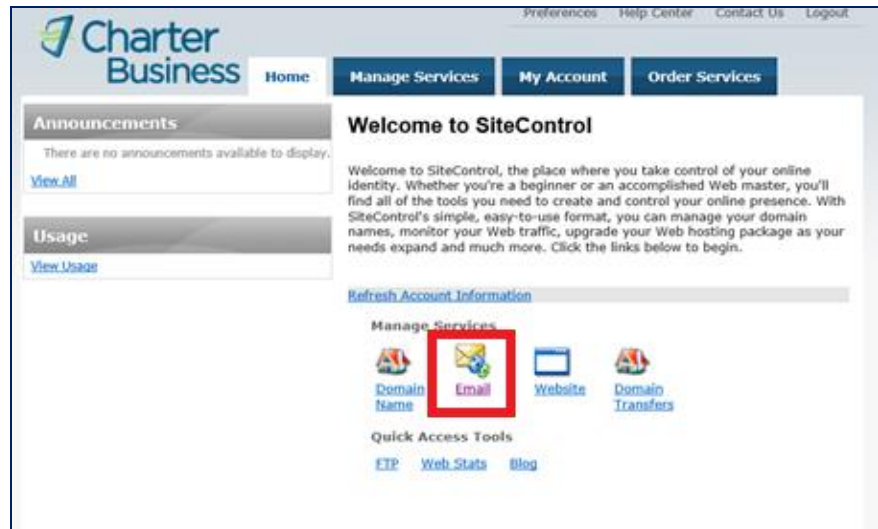
2. Click "SiteMail Mailboxes" from the Email page
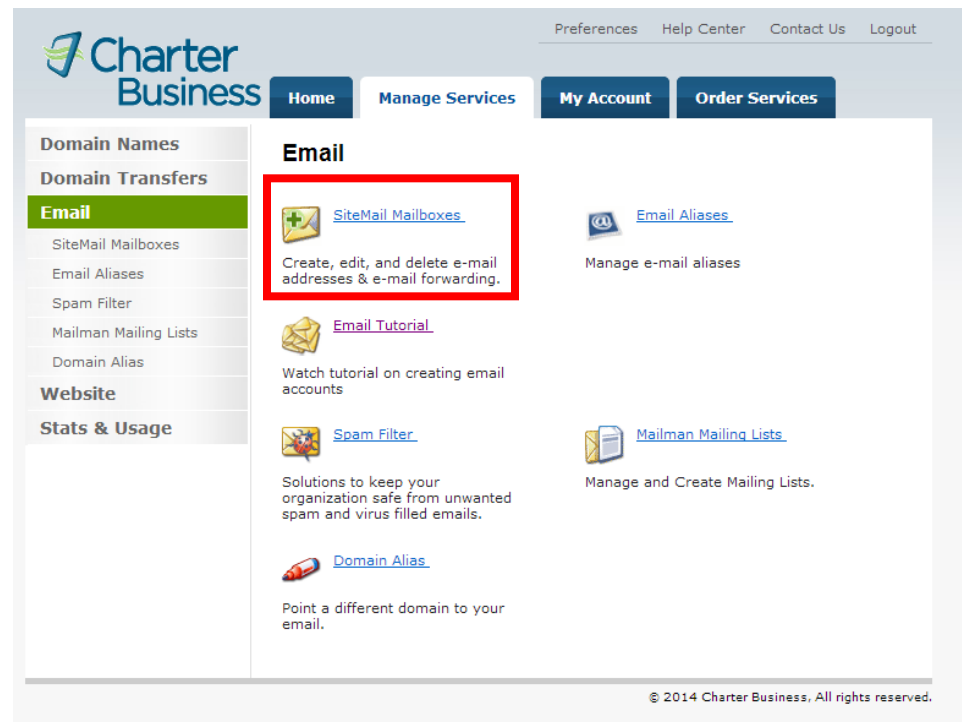
3. Click "Create Email Address"
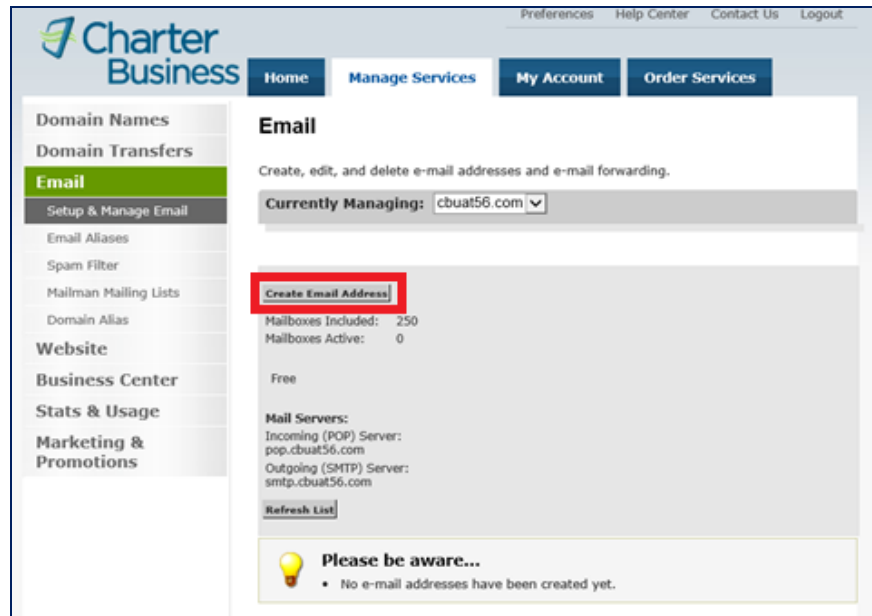
4. The Create Email Address page opens
5. Complete the following fields:
   ➢ Username
   ➢ Password
   ➢ Repeat Password
   ➢ **Optional**: Set Additional Options
6. Click "Create Email Address"

Create Email Address

Note: (*) = Required and (*) = Something Went Wrong.

Currently Managing: cbuat56.com

Step 1. Enter Email Address Name:

* **Create Username:** [_____] @cbuat56.com

- 6 to 40 characters long
- All lower case letters
- Dashes ("-"), dots (".") and underscores ("_") are allowed. No other special characters are allowed
- Must not begin with any symbols
- Must not end with any symbols
- Must not include consecutive symbols

Step 2. Set Password of Mailbox:

* **Password:** [_____]

- 8 to 20 characters
  Must start with a letter
- Must contain at least one capital letter
  Must contain at least one small letter
  Must contain at least one digit or punctuation symbol.
- Must not be a case insensitive sub-string match with the username, or the phrases: "password", "changeme", "charter", "123", "abc", "zxy" or "default".
  e.g. My-Pa55word

* **Repeat Password:** [_____]

- 8 to 20 characters
  Must start with a letter
- Must contain at least one capital letter
  Must contain at least one small letter
  Must contain at least one digit or punctuation symbol.
- Must not be a case insensitive sub-string match with the username, or the phrases: "password", "changeme", "charter", "123", "abc", "zxy" or "default".
  e.g. My-Pa55word

Note: The email address will be the username for the mailbox.

Step 3. Set Additional Options for this Email Address:

☐ Forward: Forward all incoming emails to another email address.

☐ Auto-Responder: Send an automatic reply to senders.

☐ Mailing List: Forward all incoming email to an existing mailing list.

You have no mailing lists to forward to.

[Create Email Address]   [Cancel and Go Back]
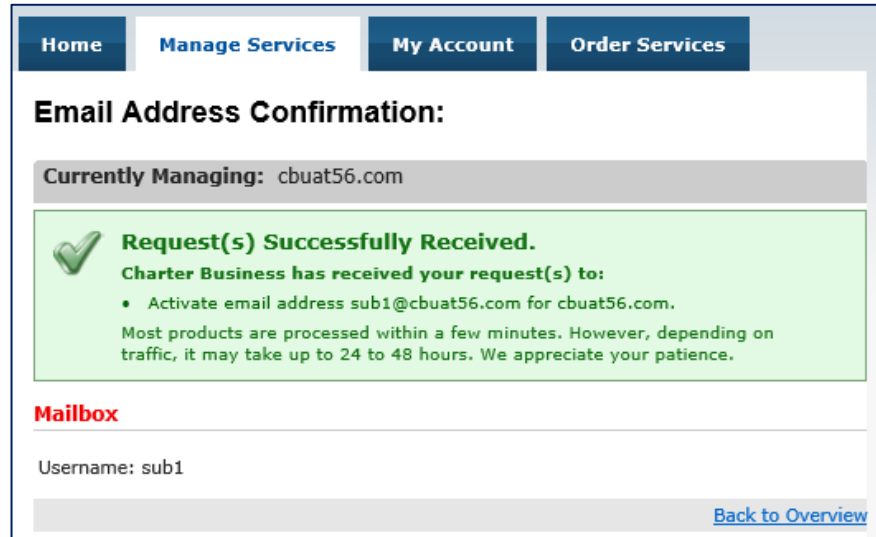
7. An Email Address Confirmation page opens, confirming the request

was successfully received

Below is the link to the Charter Business Webmail Guide. This and other support documents can be found on the Charter Business Portal Support Page.

- Charter Business Webmail Guide

For additional hosting support beyond the instructions provided within this section, please contact Hostway Technical Support, 855 381 4461.

Administration (Voice)

If you are subscribed to voice service, the "Voice" link will be active. The link will guide you to the appropriate website / portal that maintains your current voice lines and features.

If you select the Voice link you will be directed to the Charter Online Control Panel to access your voice services.

If you are not subscribed to voice service, the below message will display when you click "Voice" under the "Administration" section.

Listed below are administrator and user guides for Charter Business Phone service. These and other support documents can be found on the Support Page of the Charter Business Portal.

Administrator Guides

- Group Administrator User Guide
- Hunting and Hunt Group Voicemail Quick Reference Guide
- Group Voice Portal Administrator Guide

User Guides

- Online Control Panel Getting Started Guide
- Online Control Panel User Guide
- Individual Line Voicemail Quick Reference Guide

- [Feature Access Code User Guide](#)
- [Call Manager Quick Reference Guide](#)

If administrators want to create additional sub-users to manage telephone lines and features, they will need to do so within the Voice Administration Portal directly.

Administration (Desktop Security)

If you are subscribed to internet service, the "Desktop Security" link will be active. The link will guide you to the Desktop Security Page to obtain the necessary information to utilize the Desktop Security Software Suite.
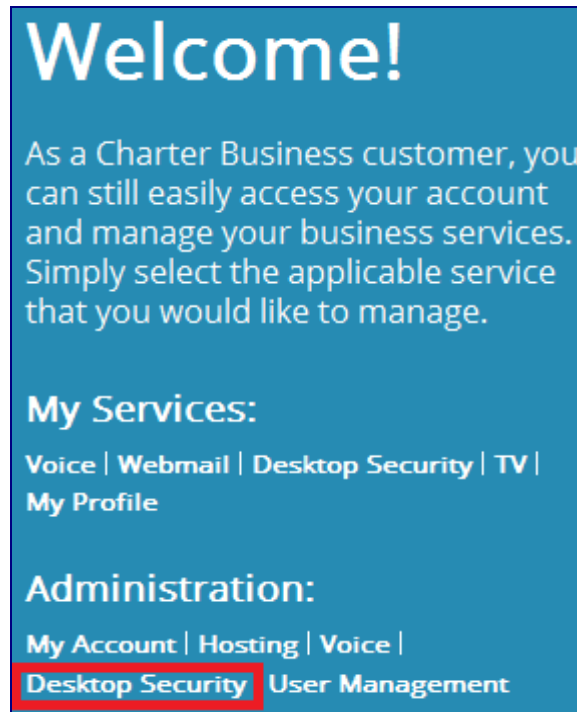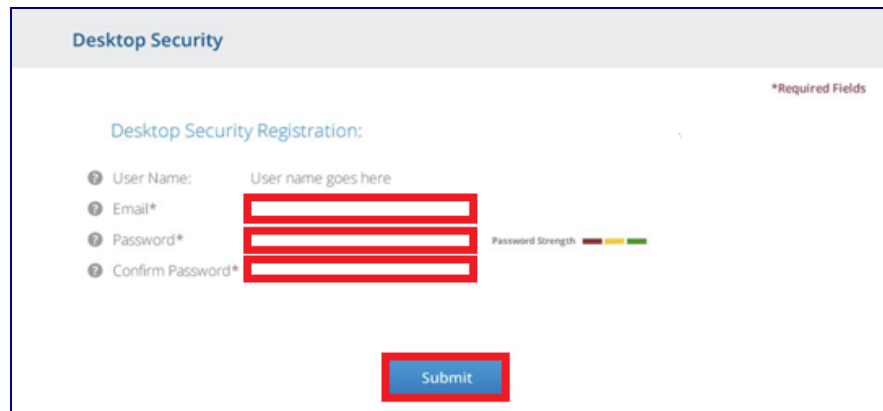
In order to access this link, you will need to have one of the below roles assigned to your Charter Business ID.

- Primary User
- Network Admin

If you are a Primary User or Network Admin and you have not registered your account with F-Secure, the first time you click on the "Desktop Security" link, you will need to create an account by following the below steps

1. Click "Desktop Security" under "Administration"
2. Enter an Email Address
   - ➢ This is the email address that will be used by the Desktop security portal for things like sending password resets to
3. Enter a Password

> ➢ This is the password that will be used when accessing the Desktop Security Portal

4. Confirm Password

5. Click "Submit"

Note: Your username is pre-populated based on the username used for the Charter Business Portal. In the event that the username is already registered with another customer, you can choose from the suggested usernames or create a different one.

If you have the proper role assignment and the account has been registered for Desktop Security, you will have access to view the following Desktop Security Registration Information:

- Desktop Security License Key: XXXX-XXXX-XXXX-XXXX-XXXX
- Desktop Security Download Link (Mac)
- Desktop Security Download Link (PC)
- Desktop Security Portal / Console Link
- Uninstall Tool
- Diagnostic Utility Tool
- Online Scanner

If you do not have the proper role assignments, the below message will display when you click "Desktop Security" under the "Administration" section.

If you are not subscribed to internet service, the below message will display when you click "Desktop Security" under the "Administration" section.

If you want to create additional users to manage Desktop Security features and functionality outside of what is available in the Charter Business Portal, you will need to create / setup users within the Desktop Security Portal directly.

Below are links to the Desktop Security User Guide and Admin Guide. These documents and other support documents can be found on the Charter Business Portal Support Page.

- [Desktop Security User Guide](#)
- [Desktop Security Admin Guide](#)

Administration   If you are subscribed to any Charter Business Line of Business, the "User

(User Management) Management" link will be active. The link will guide you to the Charter Business ID Management page to manage the following profile items for Charter Business IDs.
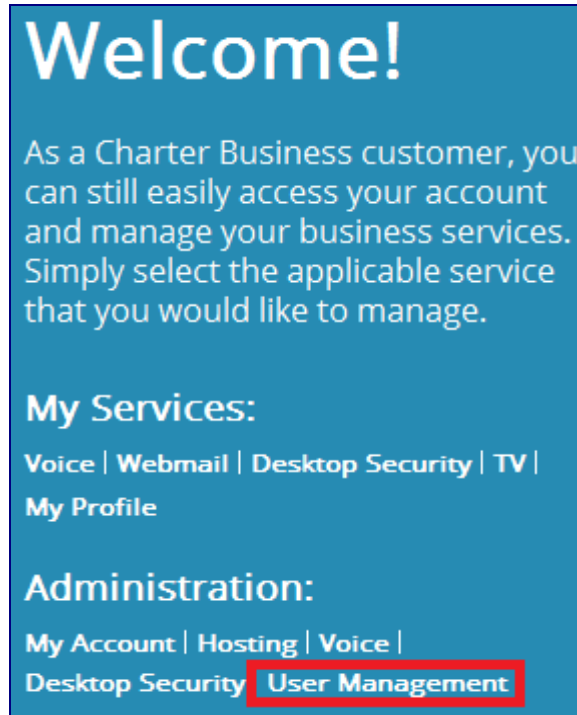
In order to access this link, you will need to have one of the below roles assigned to your Charter Business ID.

1. Primary User
2. Hosting Administrator
3. Network Administrator
4. Billing Management

Note: The below chart outlines what role type must be assigned to a user in order to perform the associated functions / tasks.

Role Type	Function / Task
Primary User	Can perform the below for all Users: • Create a New User • Search for Charter Business IDs • Edit User IDs profile information • Remove User IDs
Hosting Admin	Can perform the below only for Hosting Users: • Search for Charter Business IDs • Edit User ID roles
Network Admin	Can perform the below only for Network Users: • Search for Charter Business IDs • Edit User ID roles

	Billing Management	Billing Management can view the User Management Screen, but does not have the permissions to perform any changes to other users for the Charter Business Portal

Create a New User

1. Click "User Management" under "Administration"
2. Click "Create a New User"
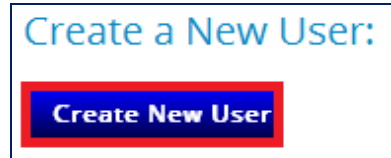
3. Enter a new Charter Business ID
   - Refer to Appendix B for Charter Business ID requirements
4. Enter a Password
   - Refer to Appendix B for Charter Business password requirements
5. Confirm the Password
6. **Optional**: Check the availability of the Charter Business ID by clicking "Check Availability"
7. **Optional**: Select the "User reset at initial login" this will force the user to change the password at first sign-in

8. Enter a first name in the "First Name" Field for the new user
9. Enter a last name in the "Last Name" Field for the new user
10. Enter a contact email in the "Contact Email" Field for the new user
11. Enter a contact phone in the "Contact Phone" Field for the new user

12. Choose a security question for the new user from the drop-down menu
13. Enter an answer to the security question in the "Answer Question" field
14. **Optional**: Select the "Reset security question and answer at initial login". This will force the user to change the security question and answer at initial login

15. Choose "Yes" for each role the new user should have.
   ➢ Refer to Appendix A for permissions that are granted with each role assignment.

Role Assignment:

? Primary	○Yes	●No
? Hosting Admin:	○Yes	●No
? Hosting User:	○Yes	●No
? Network Admin:	○Yes	●No
? Network User:	○Yes	●No
? Billing Management:	○Yes	●No

16. Click "Submit"

17. A registration confirmation page opens stating that the ID creation was successful. Click "OK"

Registration Confirmation

Your ID creation was successful!

You have successfully created the user
sub5_cbuat71 sub5_cbuat71.

OK
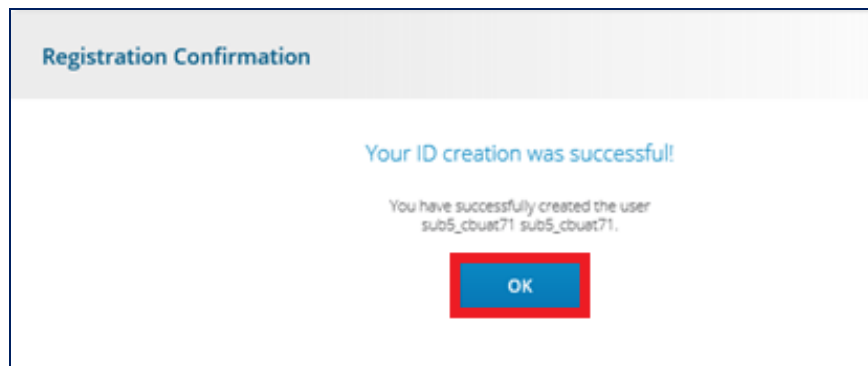
Search for a Charter Business ID

1. Click "User Management" under "Administration"
2. Enter the name of the user in the search field

Edit a Charter Business ID

1. Click "User Management" under "Administration"
2. Enter the name of the user in the search field
3. Click the ✎ icon next to the user to edit

Note: When the Charter Business ID Management page loads, the user that is being edited is listed at the top of the page.

From the editing page, you are able to change a user's password, security question and answer, contact information, and role assignment.

Change Password (For Another User)

1. Enter a new password in the "Update Password" field
   ➢ Refer to [Appendix B](#) for Charter Business ID requirements
2. Re-enter the password in the "Confirm Password" field
3. **Optional**: Select the "User reset at initial login" this will force you to change the password upon next sign-in

4. Click "Save" at the bottom of the page

5. A confirmation page opens, stating that you have successfully edited an account. Click "OK"
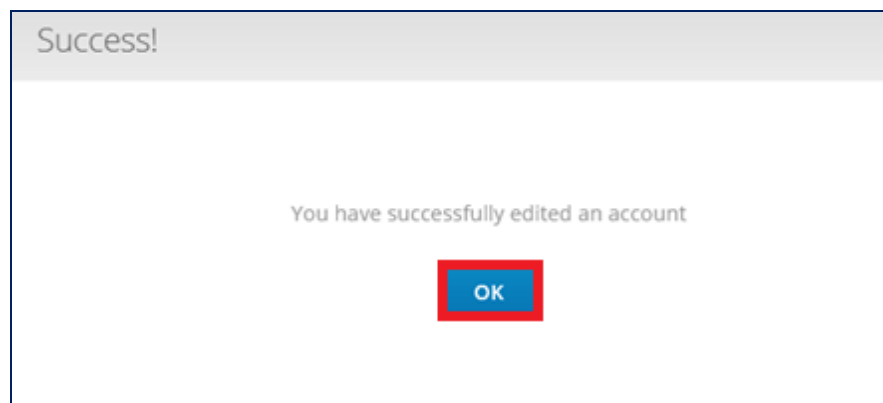
Change a User's Security Question / Security Answer

1. Choose a new security question from the drop-down menu
2. Enter the new / updated answer to the security question in the "Security Answer" field

3. **Optional**: Select the "Reset security question and answer". This will force the user to change the security question and answer upon next sign-in

4. Click "Save" at the bottom of the page

5. A confirmation page opens, stating that you have successfully edited an account. Click "OK"

Change a User's Contact Information

1. Enter a first name in the "First Name" Field
2. Enter a last name in the "Last Name" Field
3. Enter a contact email in the "Contact Email" Field
4. Enter a contact phone in the "Contact Phone" Field

Contact Information:

❓ First Name* `Business`

❓ Last Name* `Z`

❓ Contact Email* `z@example.com`

❓ Contact Phone* `555-234-2345`

5. Click "Save" at the bottom of the page

6. A confirmation page opens, stating that you have successfully edited an account. Click "OK"

Success!

You have successfully edited an account

[OK]
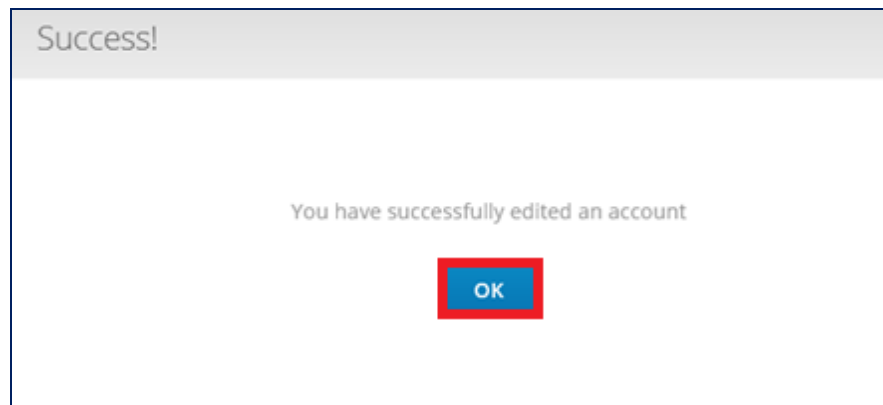
Change a User's Role Assignment

1. Choose "Yes" for each role the user should have.
   - ➤ Refer to Appendix A for permissions that are granted with each role assignment.

Role Assignment:

	Yes	No
Primary	○	●
Hosting Admin:	○	●
Hosting User:	○	●
Network Admin:	○	●
Network User:	○	●
Billing Management:	○	●

2. Click "Save" at the bottom of the page

3. A confirmation page opens, stating that you have successfully edited an account. Click "OK"

Success!

You have successfully edited an account

OK

Remove a Charter Business ID

1. Click "User Management" under "Administration"
2. Type the name of the user in the search field
3. Click the ✗ icon next to the user to remove

4. Click "Delete"

5. The user will no longer appear in the "Choose ID to Manage" section of the Charter Business ID Management page.

The below table outlines the links / buttons that will be active for you based on the Role Permissions assigned to your Charter Business ID. However, you must also have the services active on the account in conjunction with the proper role assignments for the links / buttons to be active.

Role Type	My Services					Administration				
	Voice	Webmail	Desktop Security	TV	User Management	My Account	Hosting	Voice	Desktop Security	User Management
Primary	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Hosting Admin	✓	✓		✓	✓		✓			✓
Hosting User	✓	✓		✓	✓					
Network Admin	✓		✓	✓	✓				✓	✓
Network User	✓		✓	✓	✓					
Billing Management	✓			✓	✓	✓				✓

You can create multiple logins with all different variations of role assignments with the exception of a primary user. There may only be one primary user. To change the primary user, you will need to call Charter Business Customer Care to have these settings or credentials updated / changed.

Charter Business ID Requirements

Below are the minimum requirements when creating a User ID for the Charter Business Portal. All User IDs must meet these minimum requirements, or the system will error out when attempting to create a User ID not meeting these minimum requirements.

- ➢ Minimum length of six (6) characters.
- ➢ Maximum length of forty (40) characters.
- ➢ Alphanumeric characters (a-z & 0-9).
- ➢ Only symbols allowed are .(dot), -(dash) and _(underscore).
- ➢ Must not begin with any symbols.
- ➢ Must not end with any symbols.
- ➢ Must not include consecutive symbols.

Charter Business Passwords

Below are the minimum requirements when creating a password for a Charter Business Portal user ID. All passwords must meet these minimum requirements, or the system will error out when attempting to create / change a password not meeting these minimum requirements.

- ➢ Minimum length of eight (8) characters.
- ➢ Maximum length of twenty (20) characters.
- ➢ Alphanumeric characters (a–z & A-Z & 0-9).
- ➢ Symbols allowed (@ # $ % ^ & * ( ) _ + | ~ - = ` ! { } [ ] : ; ' < ? , . /)
- ➢ Must include at least 1 UPPER case alphabetic character.
- ➢ Must include at least 1 lower case alphabetic character.
- ➢ Must include at least 1 numeric character.
- ➢ Must not include symbols \ (back slash) or " (quotes).
- ➢ Must not be a case insensitive sub-string match with the username, or the phrases: "password", "changeme", "charter", "123", "abc", "zxy" or "default".

**Charter
Business Portal
Footer Links**

Support Page Title	Resource Purpose	Link
Investor and News Center	Resource for public relations and investors news source about Charter	Link
Careers	Site to apply for jobs at Charter	Link
Your Privacy Rights	Charter's Privacy Policy as it relates to our various products and services	Link
Acceptable Use Policy	Charter's Policy that outlines what's acceptable and not acceptable when using our High Speed Internet service	Link
Terms of Service	Charter's agreement with the customer that all customers are required to agree to in order to use Charter's products and services	Link
Charter Telephone Tariff Information	Site that provides state by state tariffs for where Charter provides Telephone service	Link
Voice Services	Resource for customers to obtain information on how to use and setup there telephone service and telephone features	Link

Hosting	Resource for customers to obtain information on how to use and setup there Hosting services.	Link
Email	Resource for customers to obtain information on how to use and setup there Email services.	Link
Desktop Security	Resource for customers to obtain information on how to use and setup there Desktop Security services.	Link
Charter Business Portal	Resource for customers to obtain information on how to use and setup services on the Charter Business Portal	Link
Charter Communications	Residential Site for traditional customers that doesn't pertain to Mountain States customers.	Link
Charter Business	Commercial Site for traditional customers that doesn't pertain to Mountain States customers.	Link
Charter Residential	Residential Site for both traditional and Mountain States customers to access email and other services.	Link
Charter Media	Site that provides information specific to Charter Media and services provided by the Media organization.	Link

Charter en Espanol	Site that provides serviceability information for a specific address in Spanish.	[Link](#)
Charter Mobile	Site that provides similar information that is on Charter.com in a display / format specific for mobile devices.	[Link](#)