Selfcare – User Registration Guide

Version 2.0

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Purpose:

This document provides a streamlined overview of the selfcare registration process and the associated Billing Account linking scenarios. It is intended to help users, administrators, and support teams understand how new users are onboard, how email validation works, and how users are linked to Billing Accounts based on the account's existing configuration.

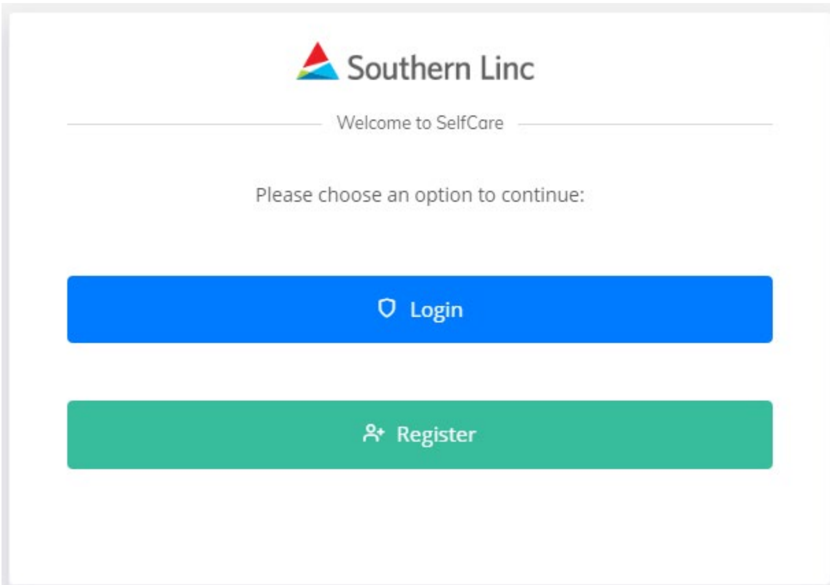
Overview of the registration process:

User registration in self-care follows a standardized workflow designed to ensure secure access and accurate Billing account association. All users begin registration through the self-care portal and must complete email verification before access is granted. Once verified, the system determines whether the user's email address is already associated with a Billing Account and guides the user through the appropriate account-linking path.

At a high level, the registration process includes:

- User profile creation in Self-Care
- Email verification using a one-time code
- Billing account validation and linking
- Automatic role assignment based on account state

Registering a new user in Self-Care

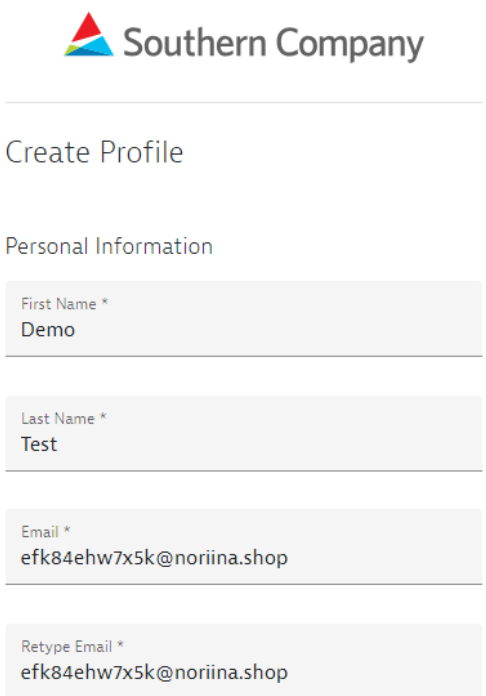


Accessing the registration page

The user navigates to the self-care portal and selects register from the welcome screen this begins the profile creation process the user completes a profile by entering their first name last name e-mail address, username and password the user must accept the terms of service to proceed the username and password created during this step are used for both self-care and user management USM access

After submitting the profile, the system sends a one-time verification code to the registered e-mail addresses the user must enter this code on the verify e-mail address screen to confirm ownership of the e-mail the verification code expires after a short period and users may request a new code if needed.

Once the code is successfully validated, the registration is marked as complete, and the user is prompted to continue.

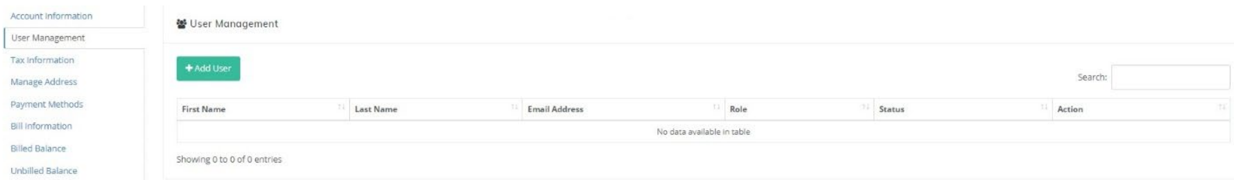


Registration and Billing Account Linking Scenarios

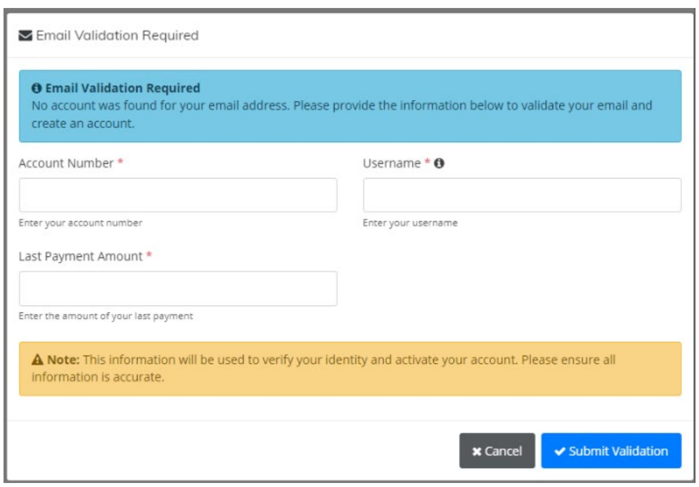
After email validation the system evaluates whether the registered email address is already associated with the billing account one of the following scenarios applies.

Scenario 1: Billing account has no users linked

This scenario occurs when a user registers with an e-mail address that is not linked to any billing account, and the target billing account currently has no users.



Upon first login, the e-mail validation required form is displayed the user must provide billing accounts specific information to validate their identity and link their profile to the account this information includes the billing account number, a billing account username used only for account linkage last payment amount or 0.00, if no payment exists.

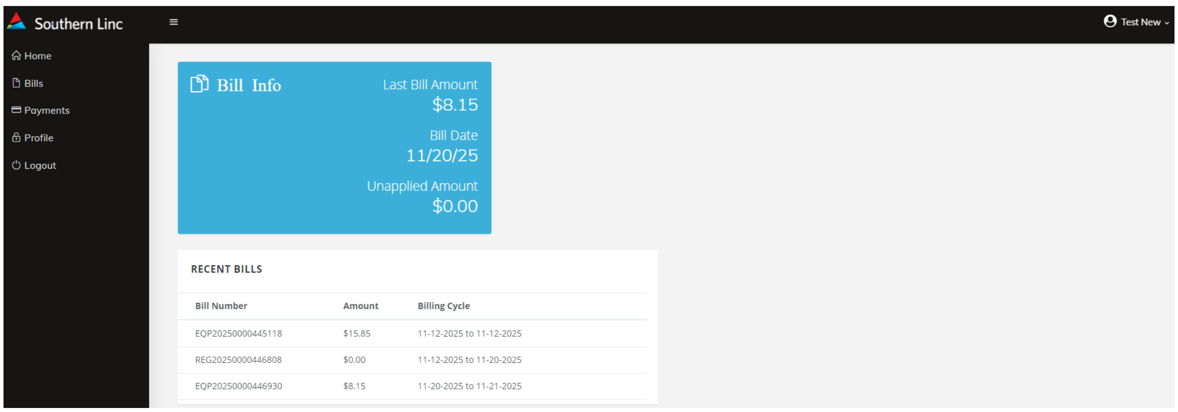


Once validation is submitted and accepted, the users log in self-care and automatically assign the Super admin role for the billing account this user becomes responsible for managing additional users and permissions.

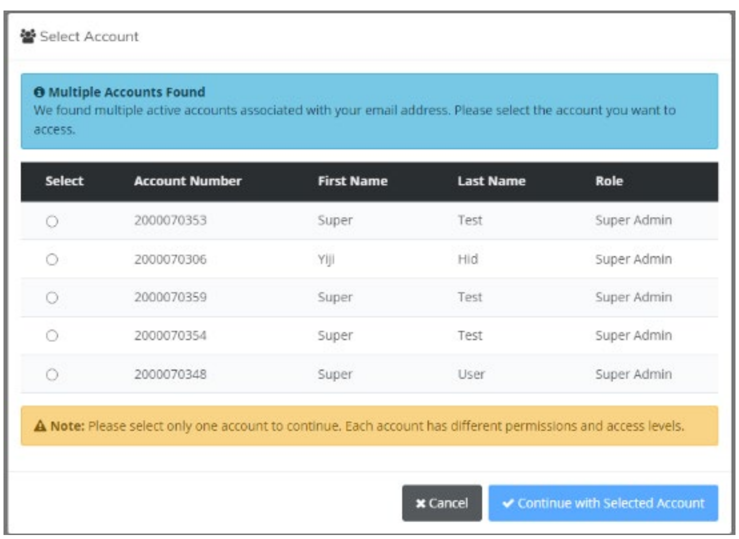
Scenario 2: One or more users linked

This scenario applies when the billing account already has at least one user associated with it

If the registering user's e-mail address is already linked to exactly 1 billing account, the system automatically logs the user into that account after e-mail verification no additional validation is required.

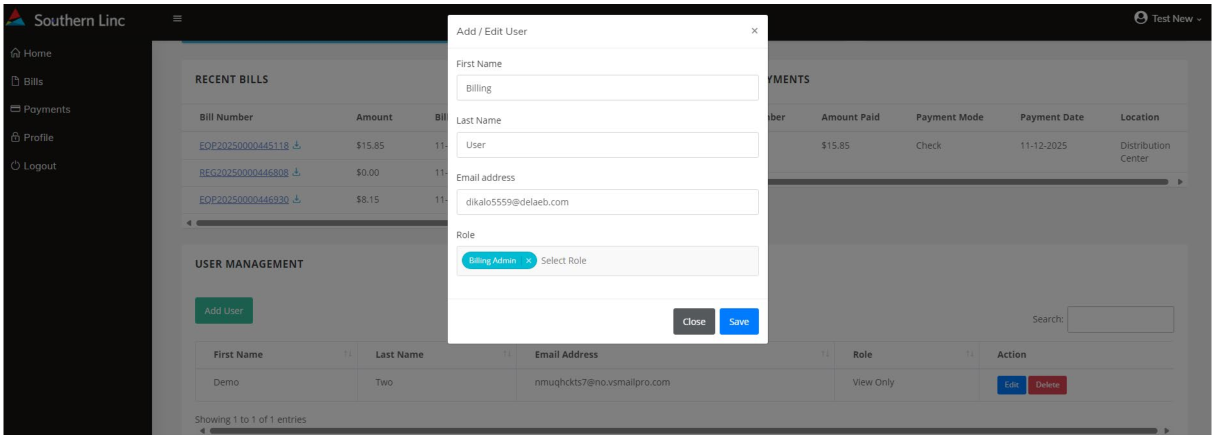


If the e-mail address is linked to multiple billing accounts the user is prompted to select which account, they wish to access before proceeding.



Scenario 3: Adding users after initial registration

Once the Super admin is established on a billing account additional users are added by the Super admin part of self-care user management section rather than through standalone registration.



Super admin as the user's name and e-mail address after which the new user receives an e-mail prompting them to complete registration and e-mail verification these users are typically assigned a view only or other restricted role by default and rule changes are managed through OAP.

Role assignment during registration

Role assignment during registration is driven by the billing account state the first user linked to a billing account the registration is automatically assigned to the Super admin role users added after the Super admin are assigned roles based on system configuration and permissions rule verification and updates are performed in OAP user management

Completion and verification

After successful registration and account linking the user gains access to the self-care dashboard. Support teams and administrators should verify that the user appears in OAP with an active status and the correct role assignment.

Roles & Permissions

Page	Features	Super Admin	Billing Admin	USM Lite Admin	View Only
Home	Bill Info	Yes	Yes		Yes
	Pay Info	Yes	Yes		
	Account Hierarchy	Yes	Yes	Yes	
	Recent Bills	Yes	Yes		Yes
	Recent Payments	Yes	Yes		
	User Management	Yes			
	USM Lite Link	Yes		Yes	
Bills	View Bills	Yes	Yes		Yes
	Download invoice	Yes	Yes		
	Make Payment	Yes	Yes		
Payments	View Payments	Yes	Yes		Yes
	Download Receipts	Yes	Yes		
Profile	View Address	Yes	Yes		Yes
	Change username	Yes			
	Mark payment method default	Yes	Yes		