CLOUDALLY
by opentext

Distributor Portal

User Guide

DP UG - CE 23.4.1

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1 Preface

1.1 Welcome

Thanks for being a CloudAlly Distributor. CloudAlly ensures that your client's data is well protected and always available for swift restore to keep your business operational and your employees productive. We give application administrators, IT leaders and audit teams the confidence and proof that their data is appropriately backed up, safe, and ready for recovery. CloudAlly strives to build real relationships with our partners and deliver exceptional service.

We hope this User Guide will help you and your customers to utilize cloud advancements, aimed at preventing critical business data loss. Our mission is to develop and support advanced software and to provide better service to our customers. If you ever have a question or need additional help, please contact us at support@cloudally.com or search our Knowledge Base at https://support.cloudally.com/hc/en-us.

1.2 Audience

This guide is intended for Distributors managing CloudAlly backup services for their customers.

1.3 What's in this Guide

This guide is organized to help you find the information you need to manage your CloudAlly customer accounts from a single portal. It is divided into functional parts intended to support you as you manage your environment:

- Getting Started
- Using the Distributor Portal Dashboard
- Billing
- Settings
- Adding a New Partner

2 Getting Started with Your CloudAlly™ Distributor Portal

Welcome to CloudAlly, which will provide your customers with a cloud-native, full cloud-to-cloud backup and recovery solution!

To help you manage your Partners, CloudAlly has developed the Distributor Portal.

CloudAlly's 3-tier Portal consists of:

1. A **Distributor Portal** for you to create new Partner Portals, manage existing Partners, and view Partners' activity and billing information. You can also create and manage your own direct customers, if needed.
2. **Partner Portals**, where your Partners can create and manage their customer backup accounts. Partners can manage the account backups for their customers or can add customers to the account, so they can to co-manage the backup process, if needed. Partners do not have access to billing information, since CloudAlly bills you, the Distributor, not the Partner.
3. **Customer Backup Accounts**. Partners, their customers, or a combination of both, can manage the backup accounts. There is no billing information displayed in the customer backup account.

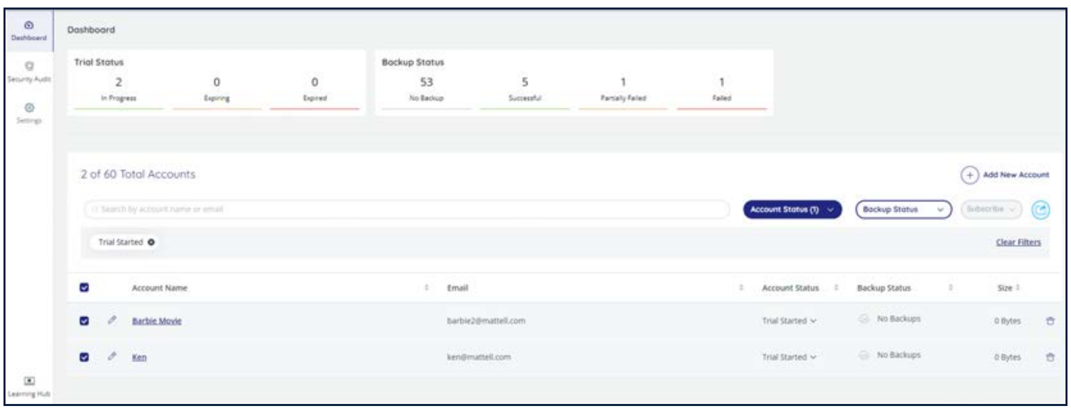
To get started, log into your portal at: https://partners.cloudally.com/ with the credentials sent to you by email.

3 Using the Distributor Portal Dashboard

The navigation panel enables you to access the following functionality:

- Dashboard
- Billing
- Settings
- Learning Hub
- Partner Zone
- Support

This section gives an overview of the main elements of the navigation panel and available operations in each of the sections.

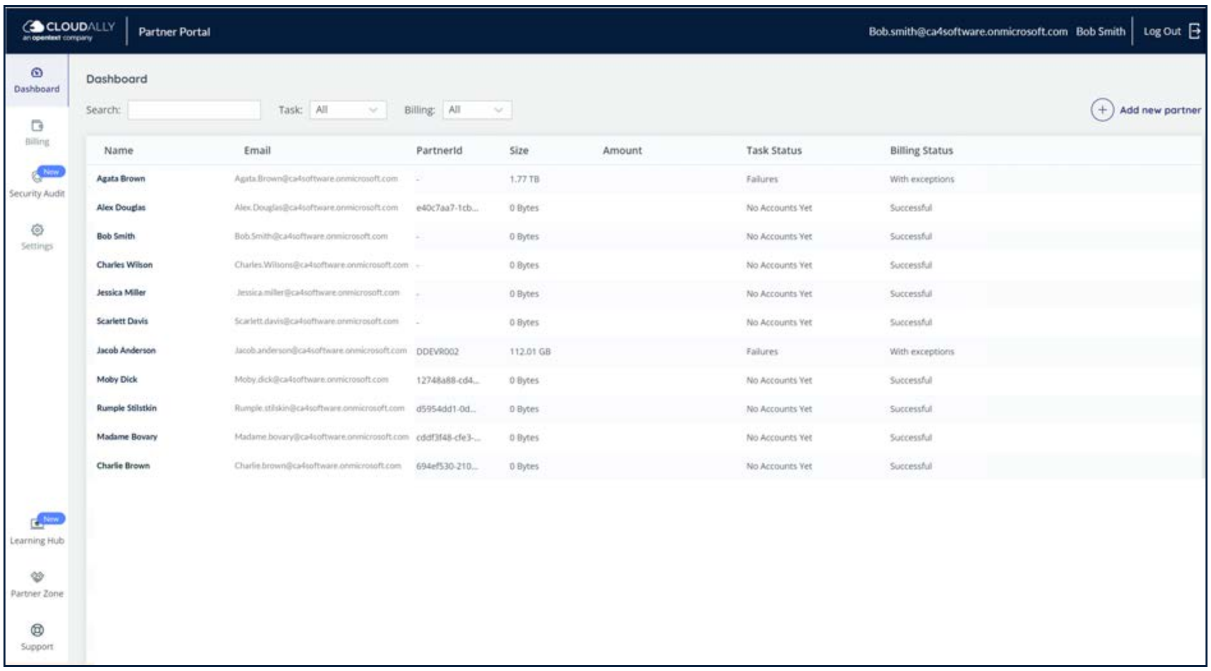


3.1 Distributor Dashboard

The Distributor dashboard offers the following informational columns:

- **Name**: the name you provided when you created a new customer's account.
- **Email**: the email of the customer.
- **Partner ID**: Unique ID of each partner
- **Size**: the total size of all backups in the customer's account.
- **Amount**: the amount paid or the amount owed.

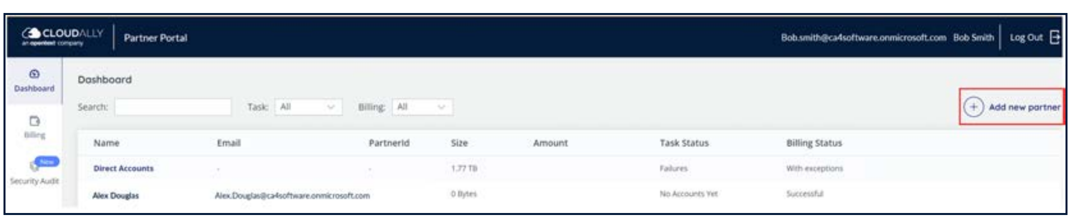
- **Task Status**: a summary of the outcome of the backup tasks: Successful, Failures, No Tasks Yet, or No Accounts Yet.
- **Billing Status:** a summary of the outcome of the billing process for the ongoing payment period: Successful, Failures, All bills on track, or with exceptions.



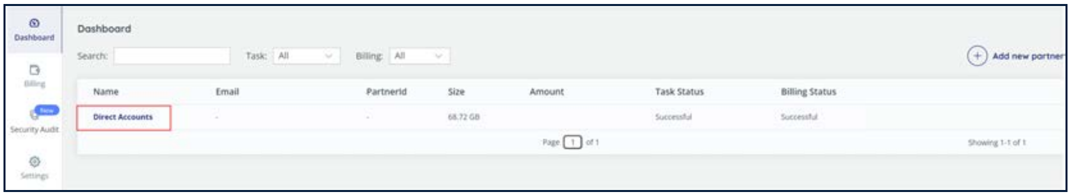
3.1.1 Features

The Distributor Portal dashboard enables you to:

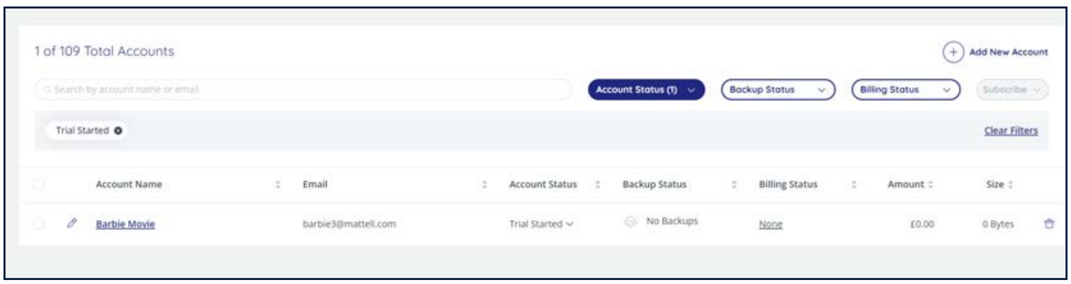
- Set up a new Partner (indirect reseller) by clicking **+Add New Partner**.



- Add a new direct customer by clicking **Direct Accounts**. This will take you to the screen where you can click **+Add New Account.**.



- Delete a trial account before it expires, by clicking on the trash icon at the end of the row.

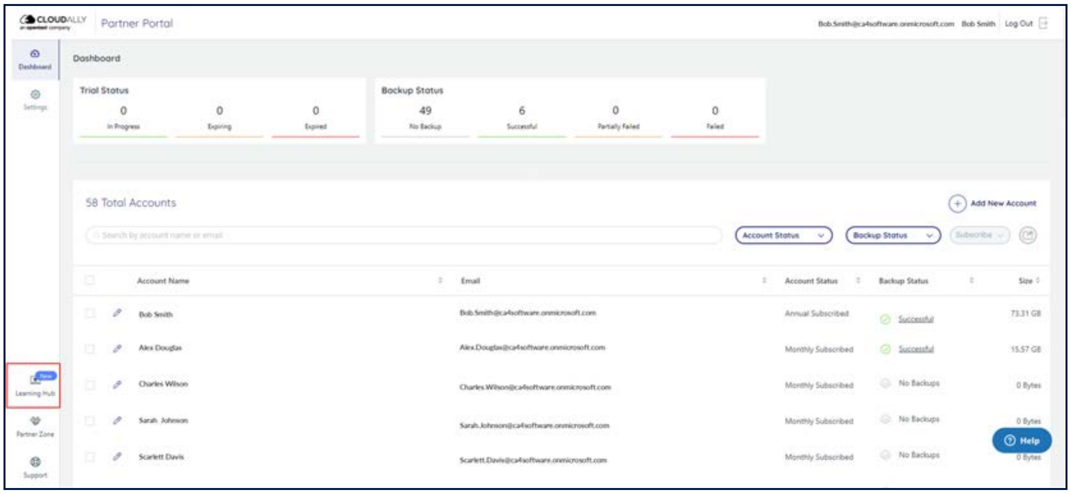


Filters

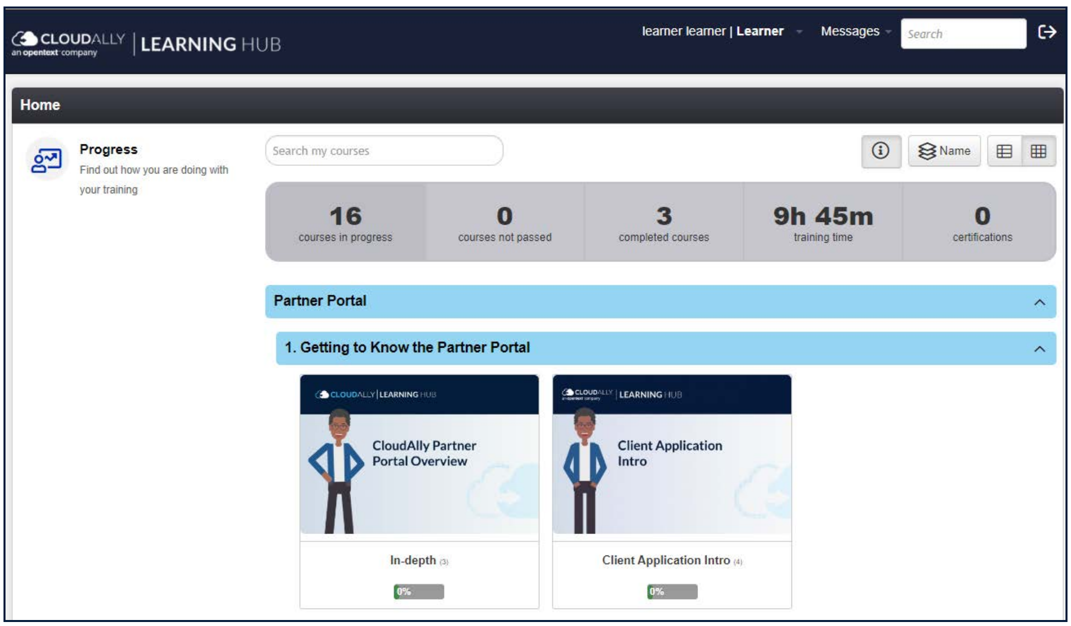
- In the Search field, you can search for an account name or email address.
- You can also filter by:
  - Task Status or
  - Billing Status.

3.2 Learning Hub

CloudAlly provides you with a rich collection of instructional videos, which will teach you how to perform tasks such as backup activation and setting up an account. You can access the Learning Hub from the Navigation Panel.



After you click **Learning Hub**, you will see the following screen:



Scroll through the videos, select one that meets your needs, and click play .


Welcome to
Start or resume course
Welcome to CloudAlly (1)
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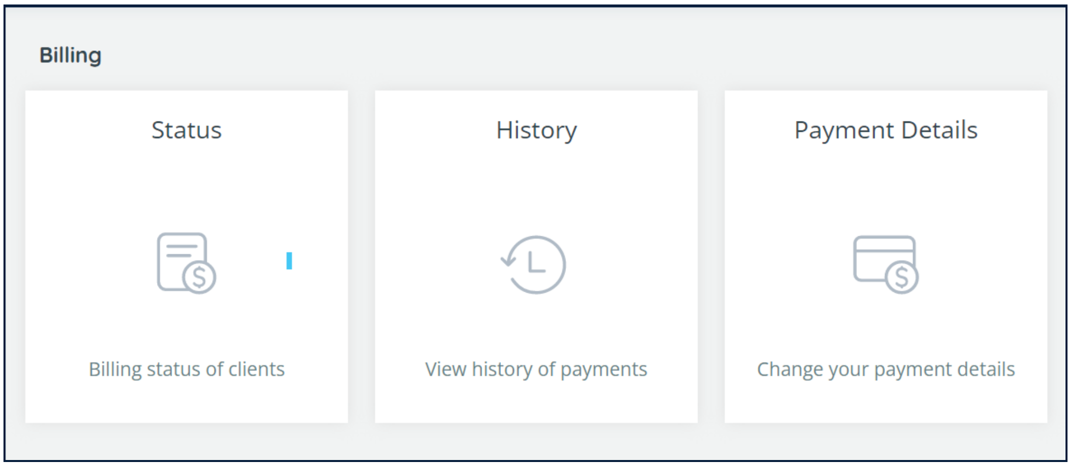
4 Billing

The *Billing* section aggregates the tools and settings for the billing and payment processes. The section consists of three sub-sections:

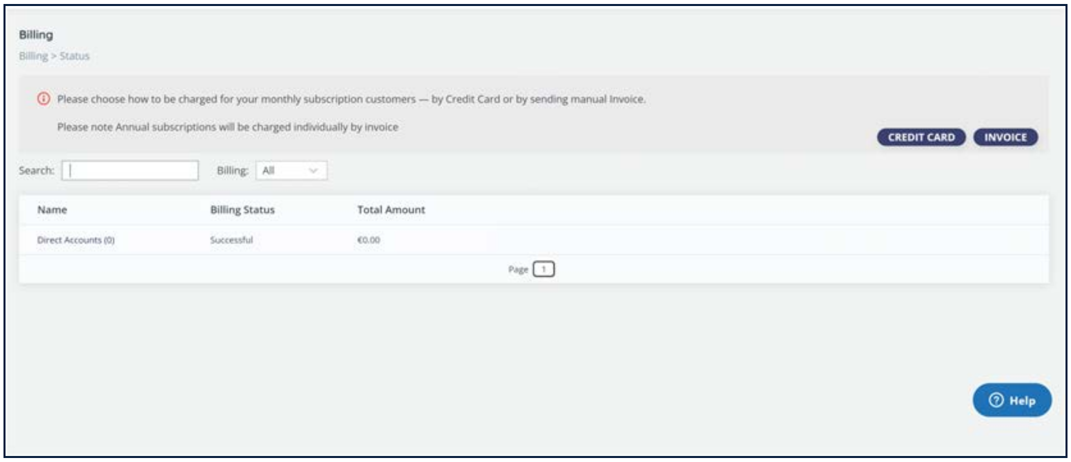
- Status
- History, and
- Payment Details



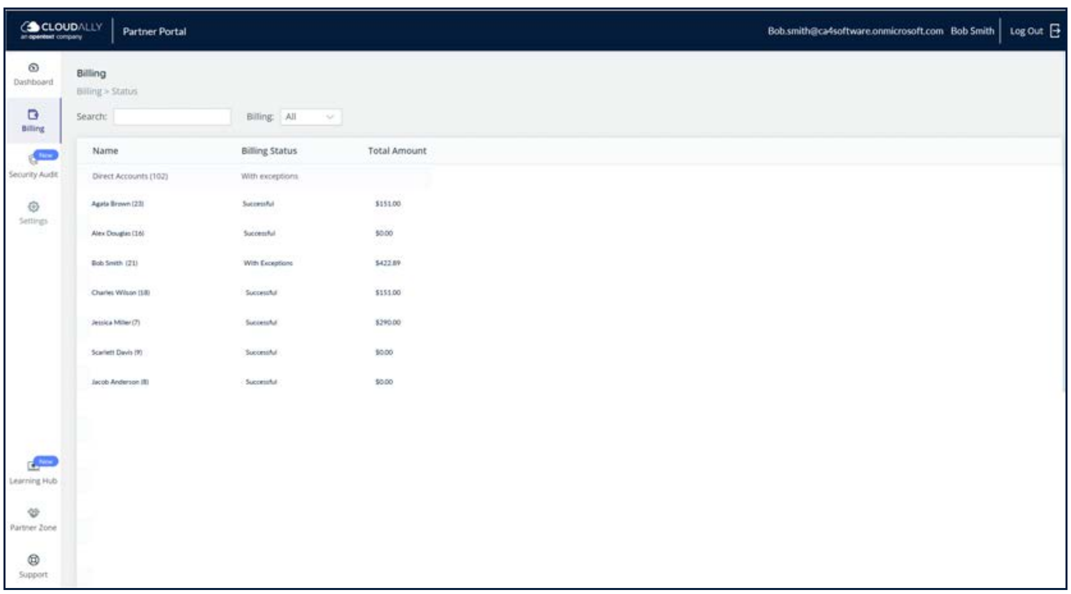
4.1 Status

The first time you enter the Billing Status screen you will need to select your default monthly billing method of either:

1. **Credit Card** – This will generate a single automated monthly credit card charge for all of your accounts that are subscribed monthly, or
2. **Invoice** – This will generate a single invoice due in 30 days and payable by credit/debit card or PayPal.



After you set up the payment method, and you begin to add partners, you will see the following *Billing Status* screen. It displays the billing status of all your customers, and how much they owe.



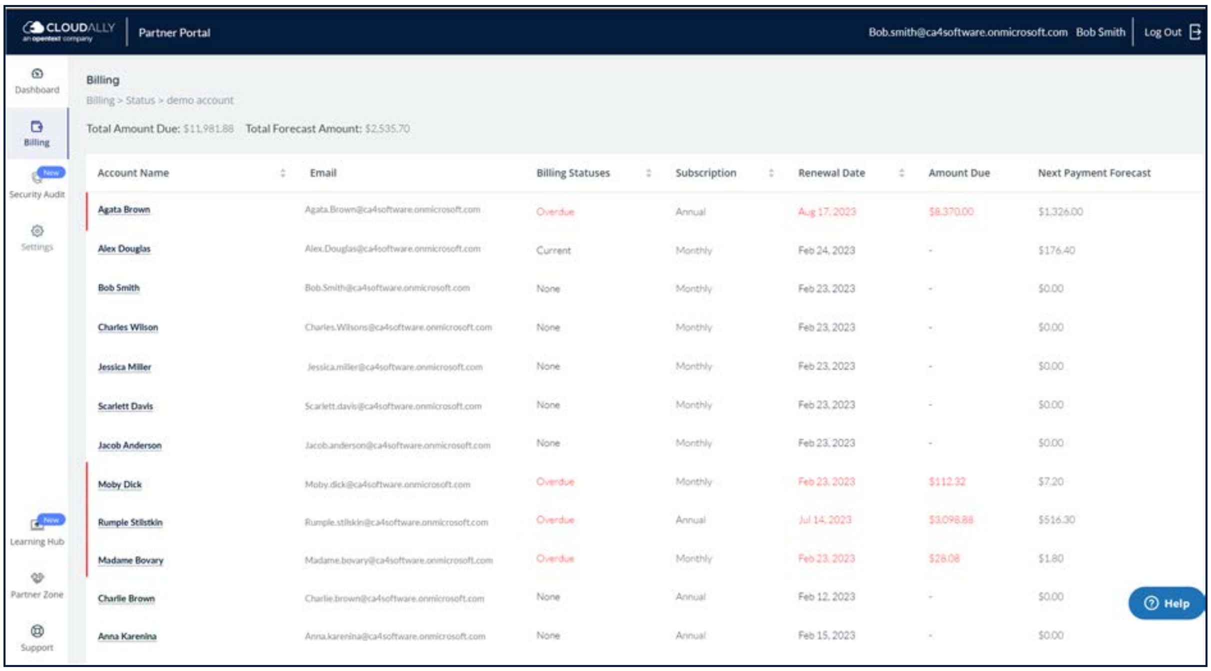
The **Billing Status** column gives a quick summary of the billing status of each of the customers' accounts.

- **Successful / All Bills on Track** means that the customer has paid and does not owe any money.
- **Failures / With Exceptions** means that money is owed.

You can drill down to the billing summary by clicking the **Account Name**

- The **Payment Status** field indicates whether the account is up to date or in arrears.
- The **Next Payment Forecast** predicts how much the customer will owe during the next billing cycle, based on recent usage trends.
- The **Next Renewal Date** field lets you know when the customer's subscription is up for renewal.
- The **Subscription** field indicates whether a customer has chosen a Monthly or Annual subscription.

If a payment has not been received for this customer, the screen looks as follows.

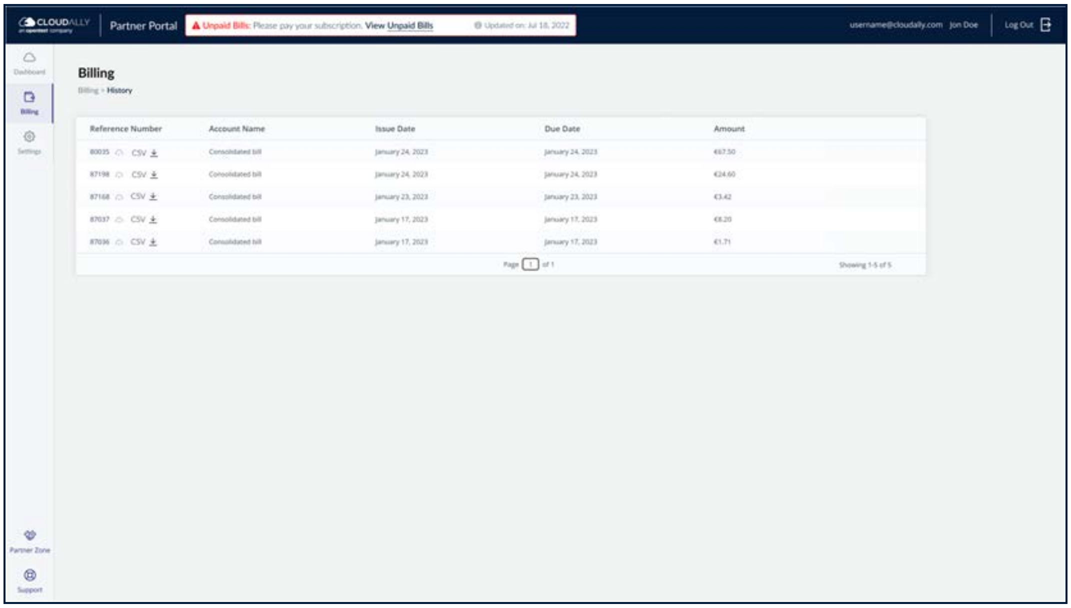


- The **Billing Statuses** field indicates that the account is either Due, Overdue, Current, or no bill has been issued yet (the customer is still in the trial period, or it is prior to the first bill).
- The **Subscription** field shows whether the customer has an Annual or Monthly subscription.
- The **Renewal Date** indicates when the monthly or annual subscription will be up for renewal.
- The **Amount Due** field provides the total amount owed.
- The **Next Payment Forecast** predicts how much the customer will owe during the next billing cycle, based on recent usage trends.

4.2 History

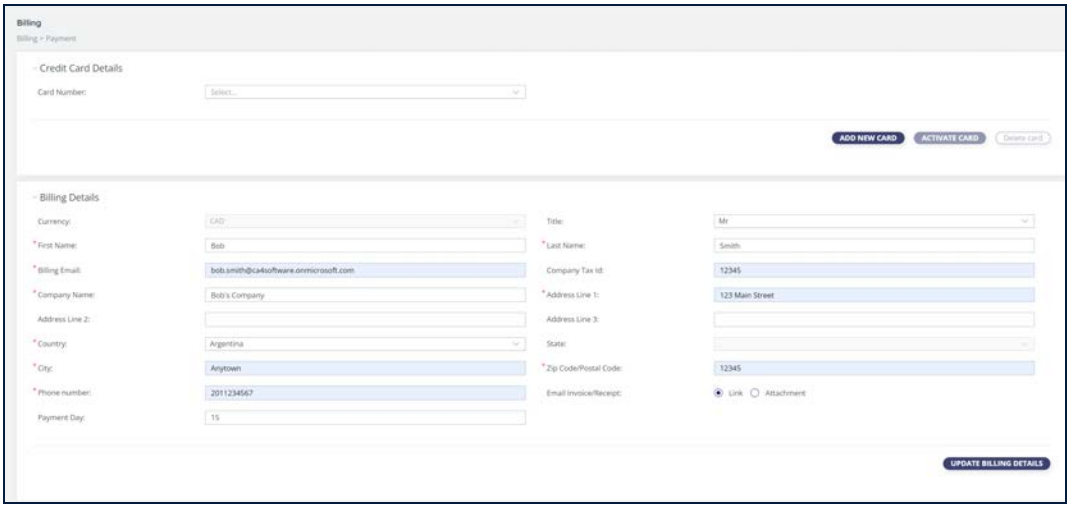
The *History* page allows you to view previous payments, and enables you to download PDFs of your past invoices/receipts by clicking the **Reference Number**.

For bills that are consolidated, you can download a detailed payment report by pressing the **CSV** button.



4.3 Payment Details

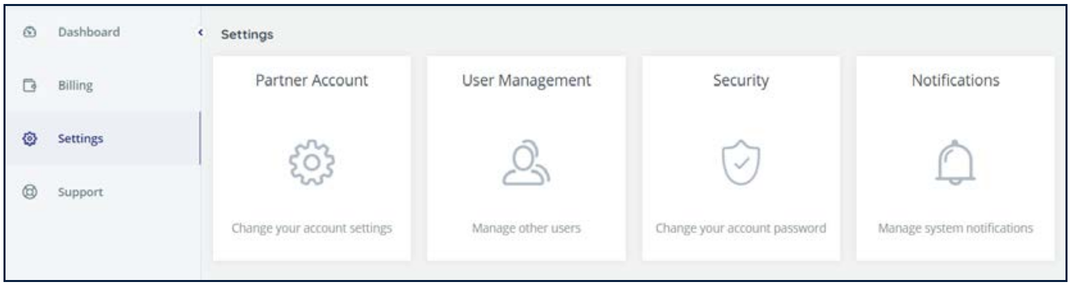
The *Payment Details* page contains your credit card number and billing address for monthly subscriptions.



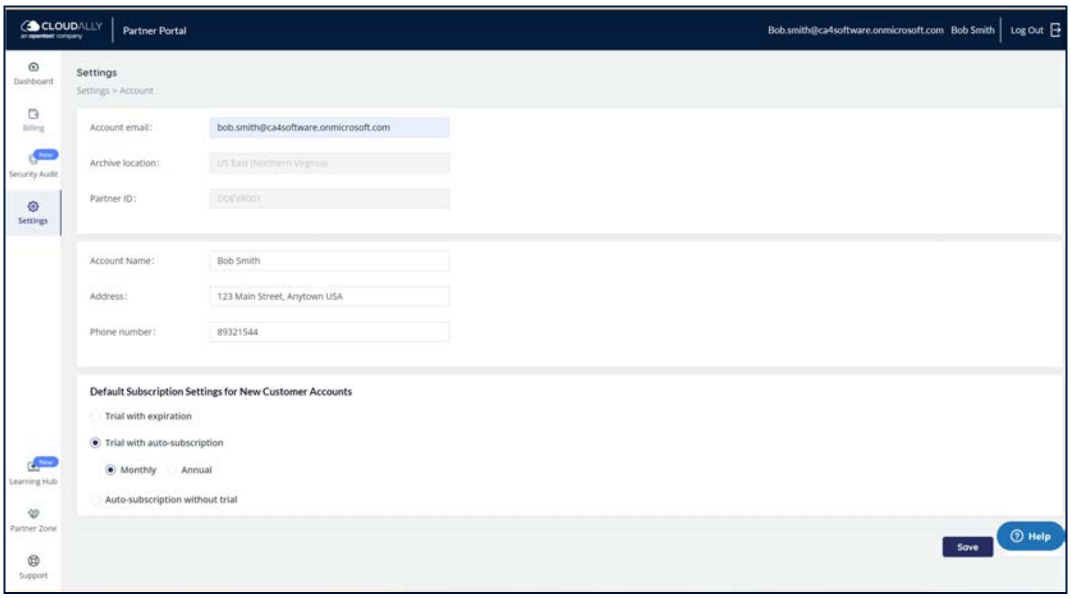
You will enter your billing details as part of your portal setup process. From the *Billing > Payment Details* page, enter your payment details, and click **Update Billing Details**.

5 Settings

Manage your Account settings, Distributor Portal Users, Security Settings, and Notifications settings:



5.1 Distributor Account Settings



Update your portal account email ID, name, address, and phone number here. You can also set which subscription setting will be the default for all new customer accounts.

Click **SAVE** to apply the changes.

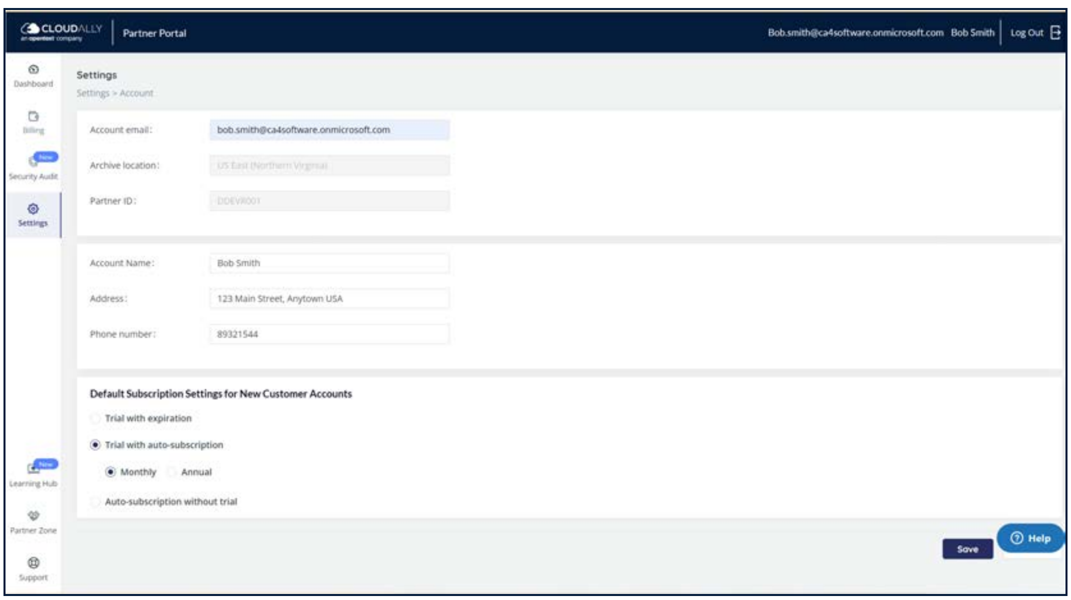
The storage location was set when your portal was configured during the registration process and it will be used as the default when setting up new accounts.

If you wish to change the storage location, you can do so by sending a request to our Support team. You can choose one of the data centers provided by CloudAlly, or you can use your own AWS storage.

5.1.1 Setting the Default Subscription Type

On the **Settings > Account** page, you can select which of the three subscription options will be the default for all new accounts that you add. You can always override the default, but it is convenient to pre-select the option that you anticipate will be your most common one:

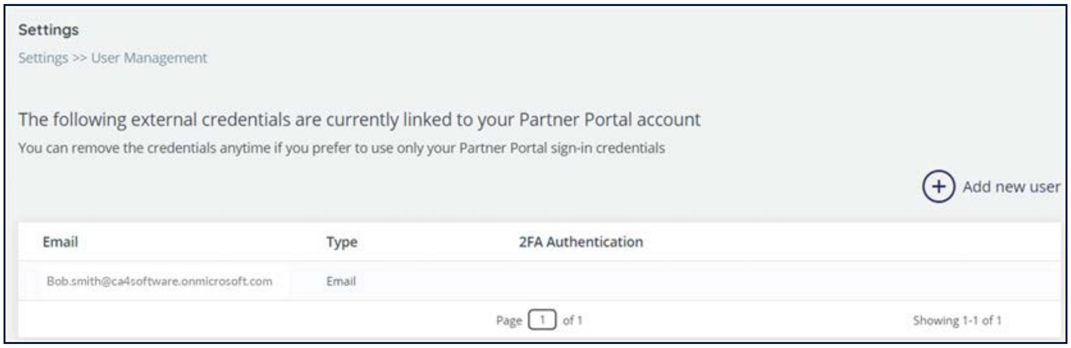
- Trial with expiration
- Trial with auto-subscription (Monthly or Annual billing)
- Auto-subscription without trial



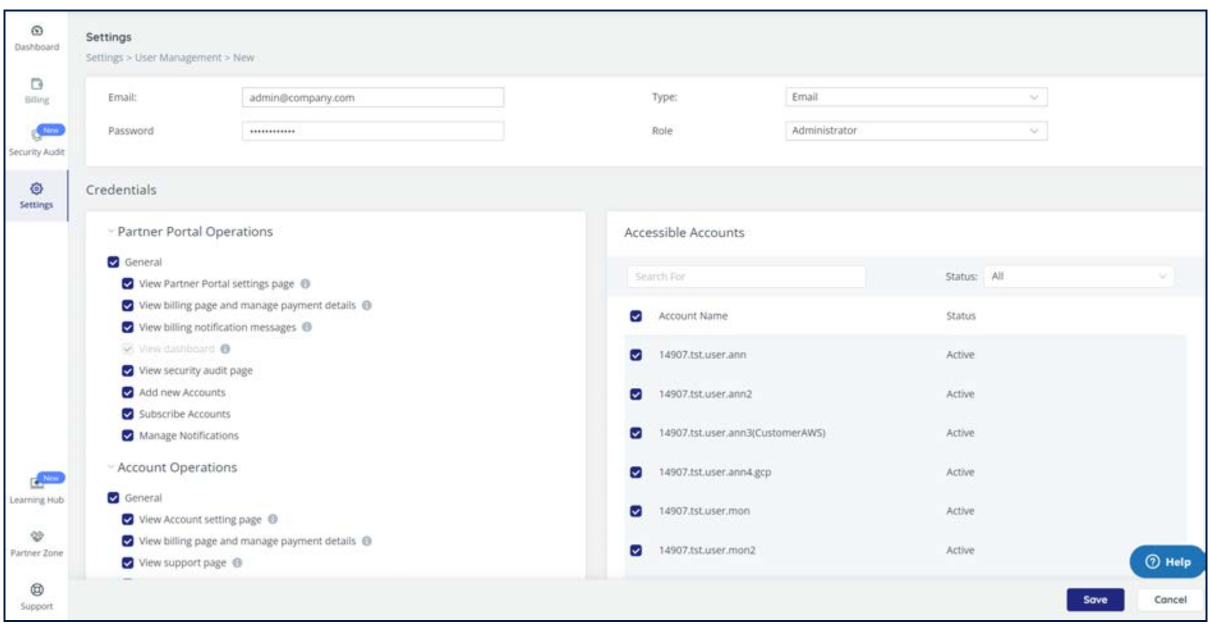
5.2 User Management

You can add other internal Partner Portal users as needed via the User Management function. The page provides full permission management and account access controls for each user you add to your Distributor portal.

To add a new Distributor portal user, click **+ Add new user**, or click the pencil icon to edit an existing user's settings.

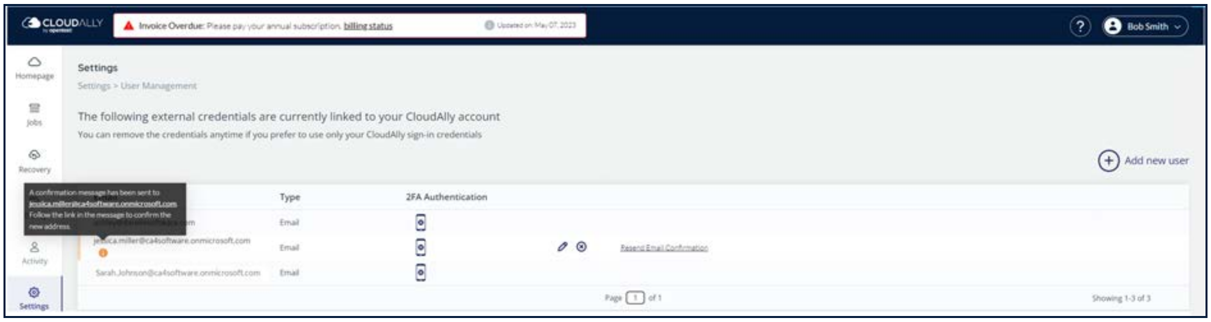


1. Add the new user's email address.
2. Select the type of credentials from the drop-down list: Azure, Email or Google+.
3. If you selected Email, add the user's password.
4. Select the user's role from the drop-down list.
    a. If you choose Administrator, then all of the Operations and Accessible Accounts will be selected.
    b. If you choose Custom, then you can selectively add permissions.



To save changes, click **SAVE**.

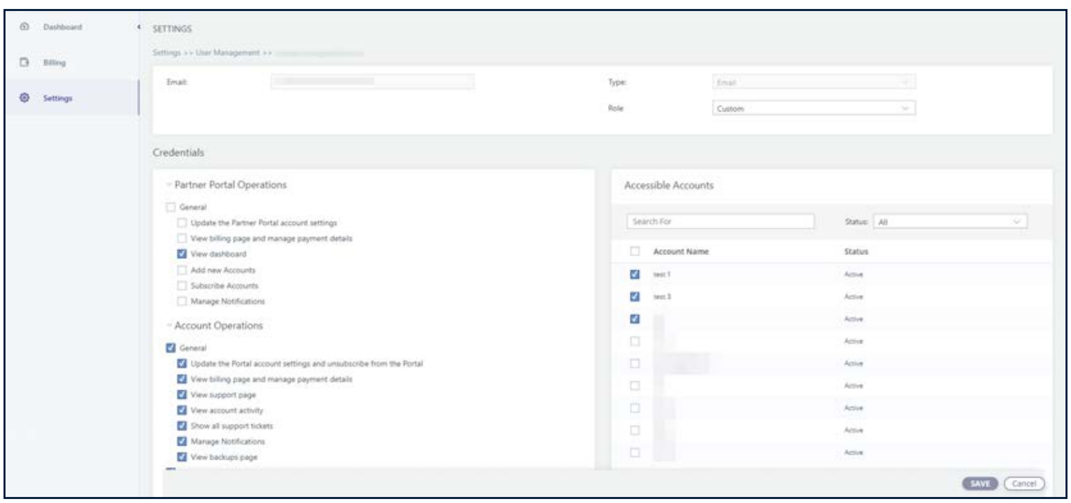
You will be returned to the *Settings* page. To complete the process, the user must confirm their email address using the link sent via email. This is a security measure, which ensures that the user's email address is valid.



The link is valid for 24 hours. If they did not confirm within this time period, or did not receive the confirmation email, click **Resend Email Confirmation**.

By default, all of your customer accounts will be accessible to the new Partner Portal user. You can limit that access by clearing the Account Name box in the Accessible Accounts section, and manually selecting those accounts that the user should be able to access. The accounts that are not accessible for the users are not displayed in their dashboard.

The next step is to select the overall Distributor Portal Operations options. To activate the Account Operations options below, you will need to first select View dashboard and/or Add new Accounts.



> **Note:** Selecting the role “Administrator” enables all services and operations, but doesn’t affect the list of accessible user accounts.

Once the Account Operations options are activated, you can then select the specific functions that this user should be able to perform.

5.3 Security Settings

In this area, you can update your portal password, set up two-factor authentication, or set up IP restrictions.

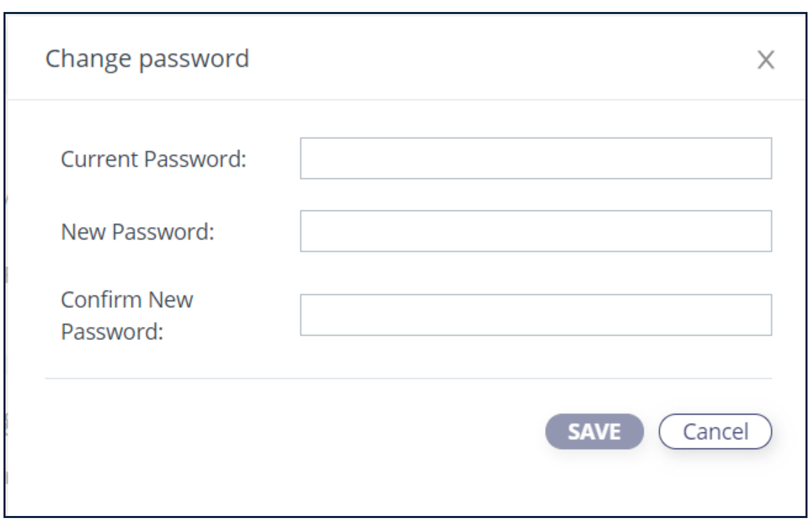
You can enable the password expiration option for all your users – the expiration policy will be enforced on their accounts.

5.3.1 Changing your Partner Portal Password

You can change your existing account password as follows:

1. From the Navigation panel, select **Settings** and then **Security**.
2. On the *Password* screen, click **CHANGE PASSWORD**.

The *Change Password* screen is displayed.



3. Enter the current password in the **Current Password** field.
4. Enter the new password in the **New Password** field.
5. Re-enter the new password in the **Confirm New Password** field.
6. Click **SAVE**. You can now use this password to access your Partner Portal account.

5.3.2 IP Restrictions

Need fine-grained access control of your endpoints? You can restrict access to the Partner Portal based on the users' IP addresses. This is especially helpful to enforce security policies and prevent unauthorized access by limiting backup/restore requests to company-approved IP addresses, such as an office IP, or a particular VPN.

Setting Up IP Restrictions

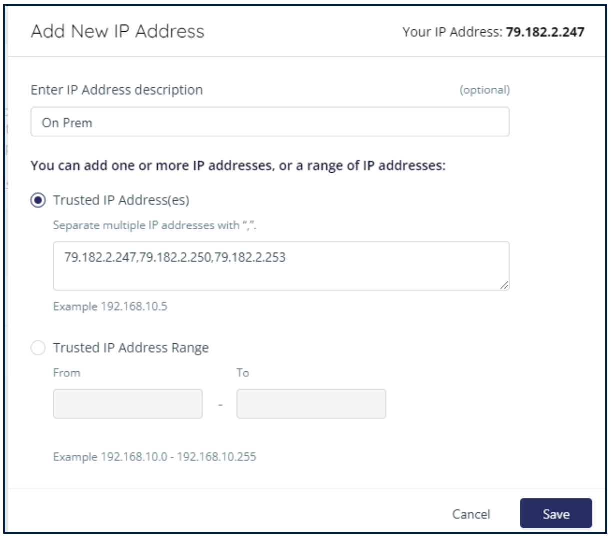
To enable IP restrictions in your account, first create the list of trusted IP addresses.

> **IMPORTANT!**
>
> It is strongly recommended to use this feature only if you have a static IP address, to prevent users from being locked out.

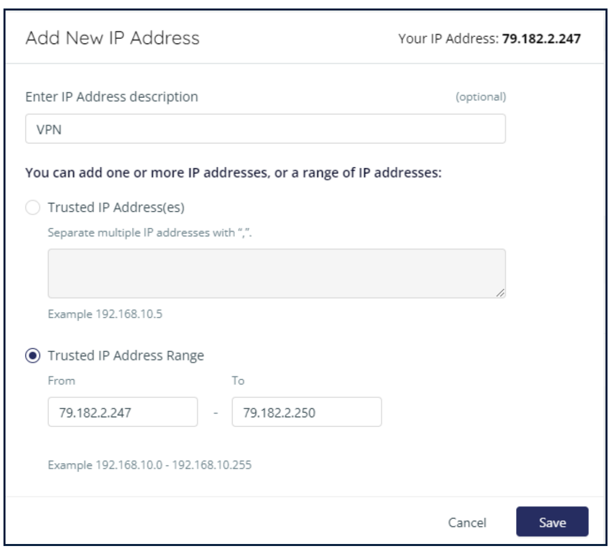
1. In the *Settings* panel, click **Security**, and then **IP Restrictions**.

2. Click **+ Add IP Address.**
3. Enter one or more IP addresses:

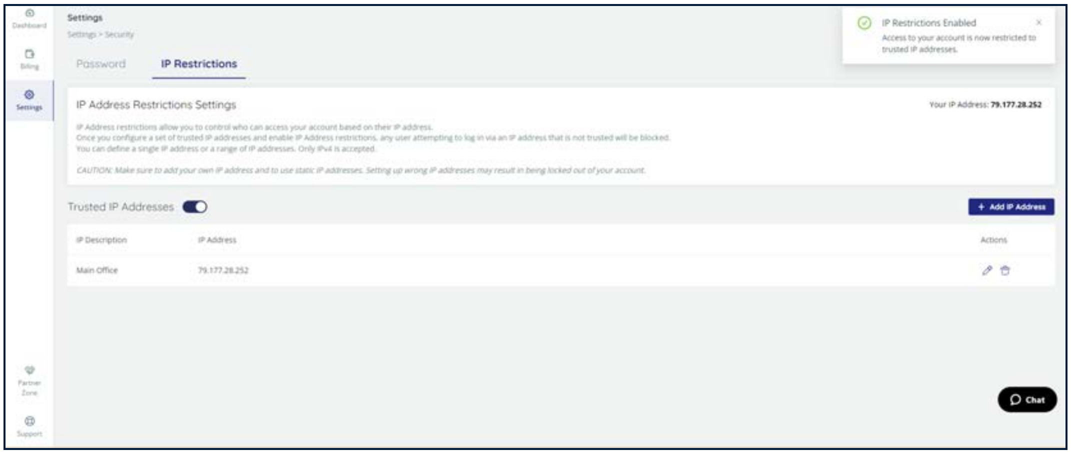
    a. Enter individual addresses separated by commas, and an optional description.



    b. Or, enter a range of contiguous addresses, and an optional description.



4. Once you enter at least one address, the **Trusted IP Addresses** toggle will be turned on. You can always return to disable IP restrictions later on.



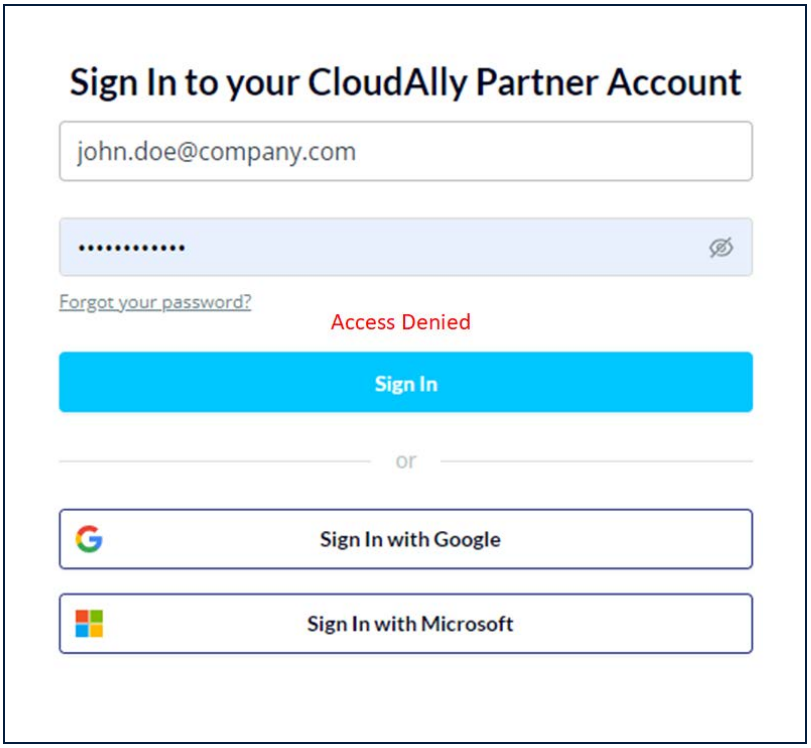
You can edit your list of addresses by clicking the pencil icon, or delete ones that you no longer want on your trusted list by clicking the trash icon.

> **Note:** If you forget to include your own IP address on the trusted list, IP restrictions cannot be enabled.

Your account is now protected from access by users who are not on your list.

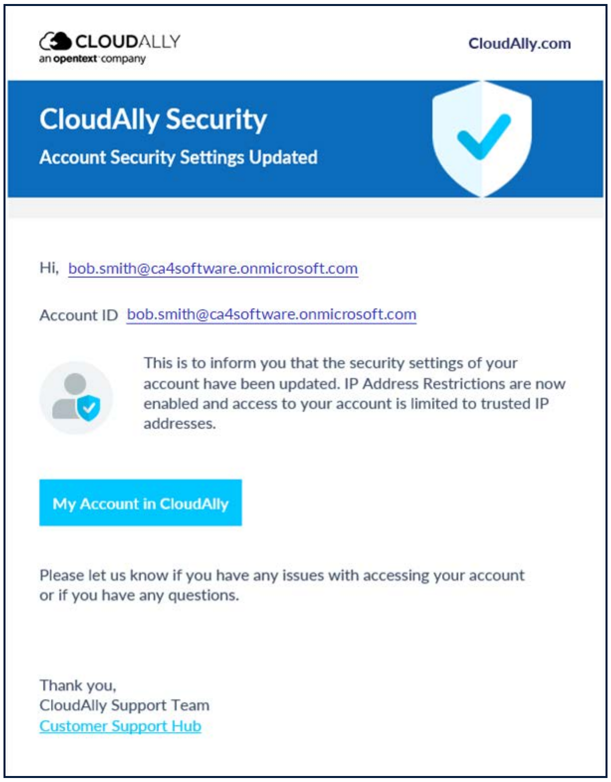
Blocking Access

If a user tries to access your account from an untrusted IP address, the following "access denied" error message will appear:


Sign In to your CloudAlly Partner Account
john.doe@company.com
Forgot your password?
Access Denied
Sign In
or
Sign In with Google
Sign In with Microsoft

5.3.3 Email Notifications

Whenever you enable or disable IP restrictions, or modify the addresses, CloudAlly will send you an email notification, letting you know what has changed. It is also logged in the Security Audit. (See "Security Audit".)



5.4 Security Audit

The *Security Audit* page provides a history of all the security-related actions that you and your Partners performed. The events that are recorded include:

- Subscribed to plan
- Sign-in
- Account accessed
- Changed account name
- Changed security settings
- User Management, such as new account name or address, or deletion of users

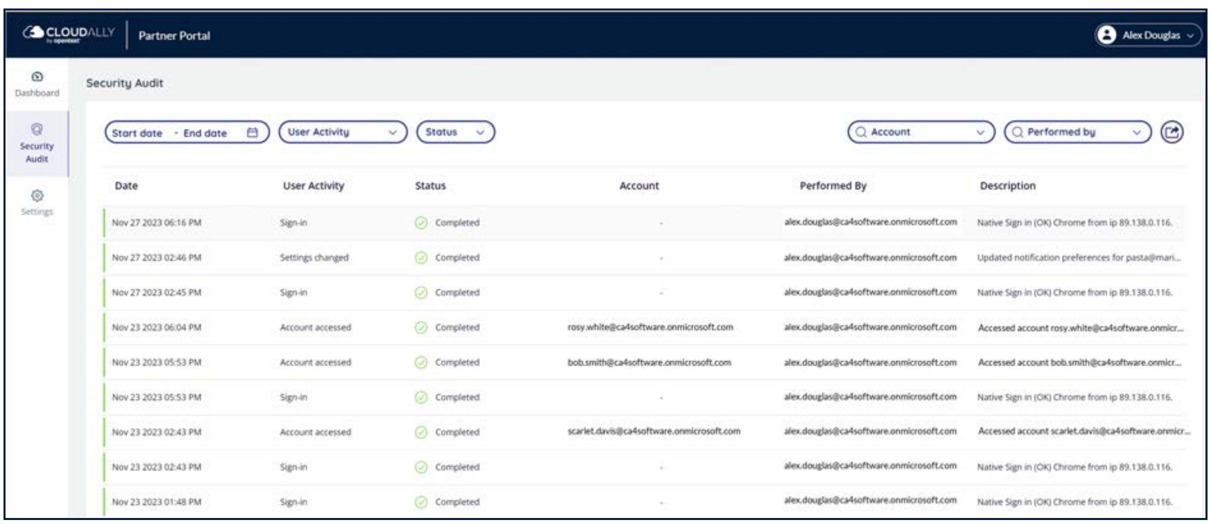
- Change billing details, such as credit card update
- Notification, such as export security audit

The page includes the date of the event, the type of activity, the status of the activity (completed or failed), the user performing the activity, and a more detailed description.

You can filter the actions by:

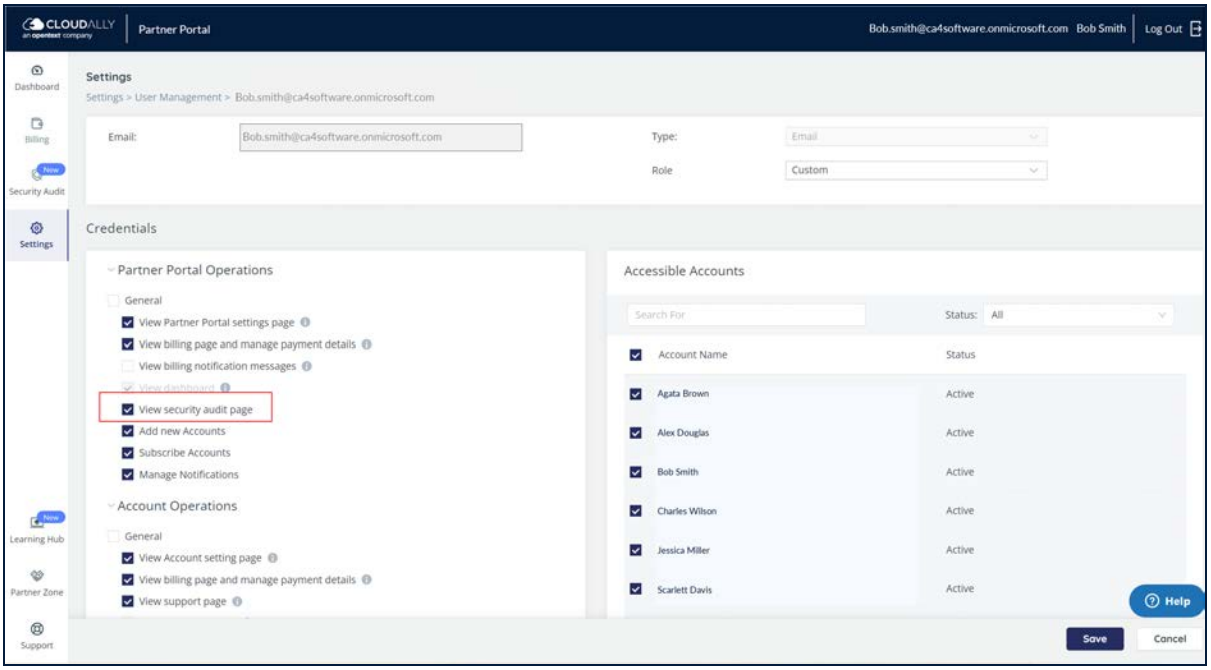
- Date range
- User activity type - sign-in, account accessed, billing details update, permissions changed, settings changed, notification, and trial canceled.
- Status
- Account - alphabetical list of all Partners' accounts,
- and the user performing the activity.

The Security audit table can be exported as a CSV file by clicking **Export**



5.4.1 Setting Security Audit Permissions

You can restrict access to the Security Audit page by removing the checkmark from the *View Security Audit* option for a particular user on the User Management page.



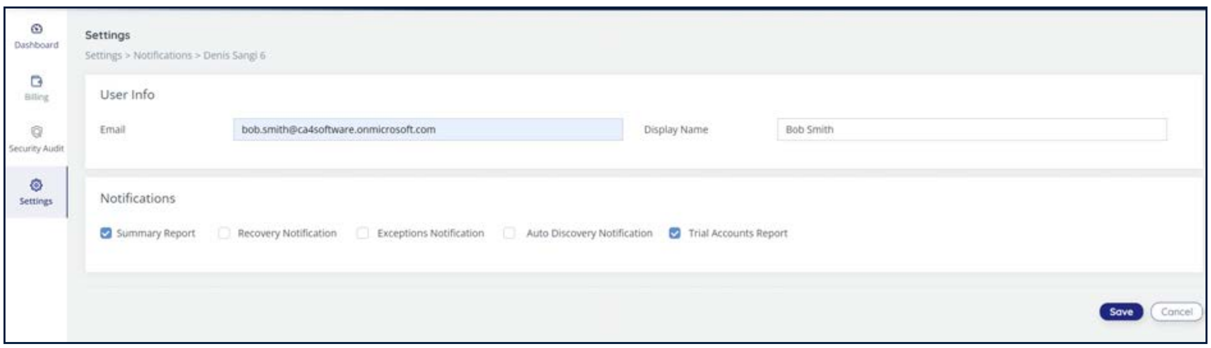
5.5 Notifications

This page provides a set of tools for control over the flow of the notifications including the backup summary report, restore and export recovery notifications, trial accounts report, and backup exception notifications. You can control the general settings of the notification, such as the frequency of reports (daily, weekly or monthly), and whether the CSV backup detail report is included as an attachment or provided via a link in the email.

This page displays the summary of all recipients' notification settings and allows you to add new recipients or edit existing recipients as needed.

Setting up a new recipient is simple:

1. Click **+ Add new recipient.**
2. Enter the Email of the recipient and the Display name. The Display name is used in the report email to address the recipient.
3. Select the required notification types:
    a. Summary report
    b. Recovery notification
    c. Exceptions notification
    d. Auto discovery notification
    e. Trial Accounts report
4. Click **SAVE**.



To edit an existing recipient's notifications settings, click on the icon to the right of the recipient you wish to edit.

5.5.1 Backup Radar Integration

Wading through your numerous customers' backup summary reports, looking for any anomalies or red flags, can be very time-consuming.

CloudAlly has integrated with the remote monitoring and management company, Backup Radar. Your consolidated task-level reports and customers' back up health statuses will be seamlessly integrated with Backup Radar's dashboard. A quick look on the dashboard will alert you to any issues across your entire customer base.

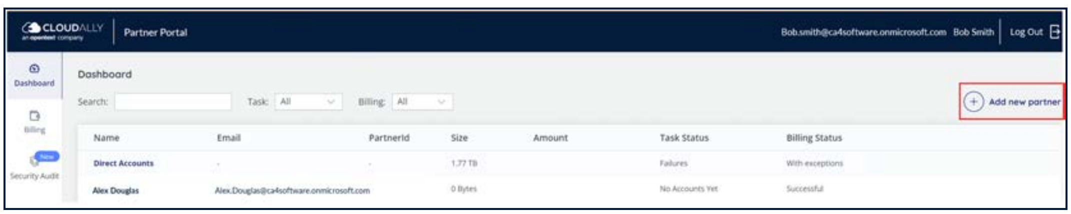
To enable this feature, contact Support.

6 Adding a New Partner

From the Partner Portal dashboard, you can create a new account for each Partner using a unique email ID.

> **IMPORTANT!** It is recommended that an email address that does not send email to the customer be used. It is also recommended that aliases be used over shared email addresses. Theses email addresses cannot be reused within the CloudAlly partner portal for multiple customers - each must be unique.

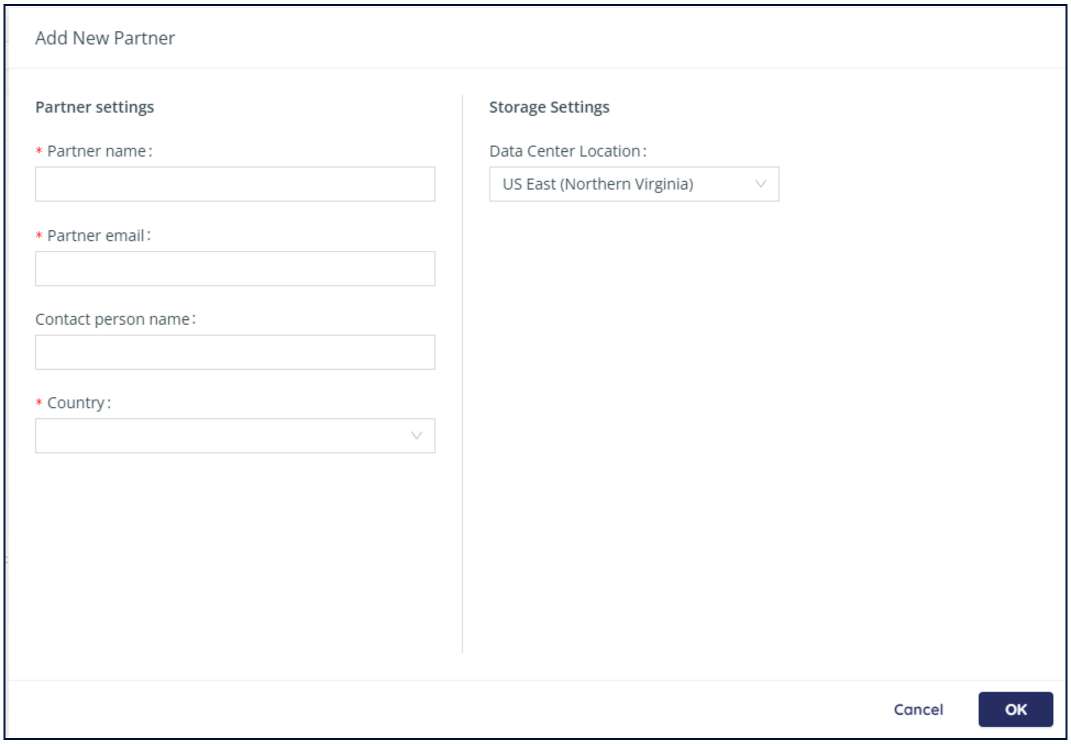
From the Distributor Portal, click **+Add New Partner**.



6.1 Partner Settings

Complete the following fields about your partner:

- Partner Name
- Partner Email
- Contact person name
- Country

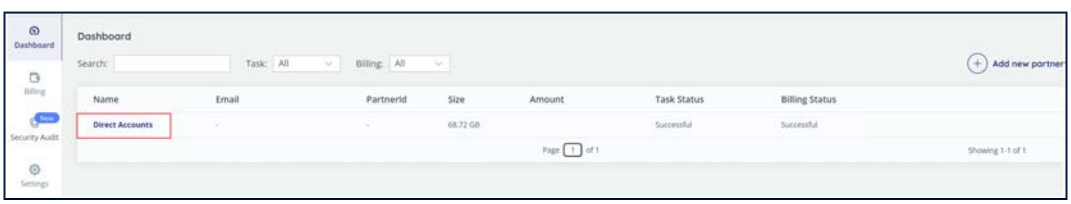


6.2 Storage Settings

Select the data center location from the drop-down list.

6.3 Adding a Direct Customer

To add a direct customer, click **Direct Accounts**. This will take you to the screen where you can click **+Add New Account**..



6.4 Activating Backups for New Direct Accounts

The next step in setting up your new direct account is to activate their backups.

To activate backups:

1. From the Distributor Portal Dashboard, click the **Account Name**.
2. You will be logged in to the user's account. Click **+ Add Backup Task**.
    a. See the CloudAlly User Guides for instructions per service for how to add a new backup task. After you add the task(s), then you will need to select them and Activate them.
    b. You can also add a customer admin if needed to the account at that time via the User Management function, including the ability to manage permissions and remove the billing summary screen from their view.

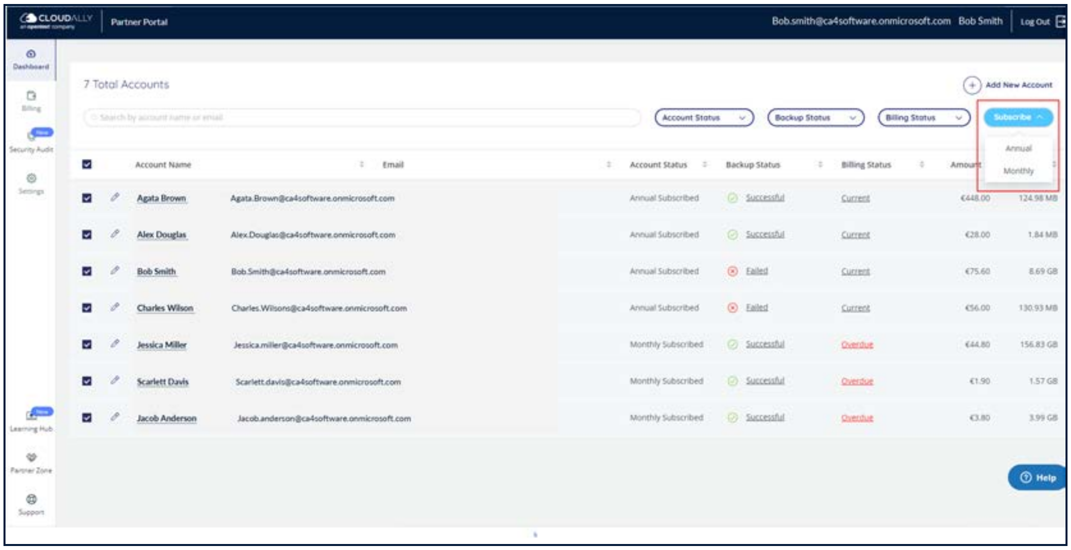
6.5 Subscribing a Trial Account

Trial accounts must be subscribed before the end of the 14-day free trial period. Accounts can be subscribed:

- **Monthly**: By either consolidated invoice or consolidated automatic credit/debit card charge, depending on which billing method you selected when you first set up the partner portal.
- **Annually** by invoice (per account) due in 30 days and payable by credit/debit card or PayPal.

Invoices over $1,000 USD can also be paid by international bank transfer if needed.

You can subscribe to all your trial accounts directly from the Dashboard by clicking **Subscribe > Annual** or **Subscribe > Monthly**:



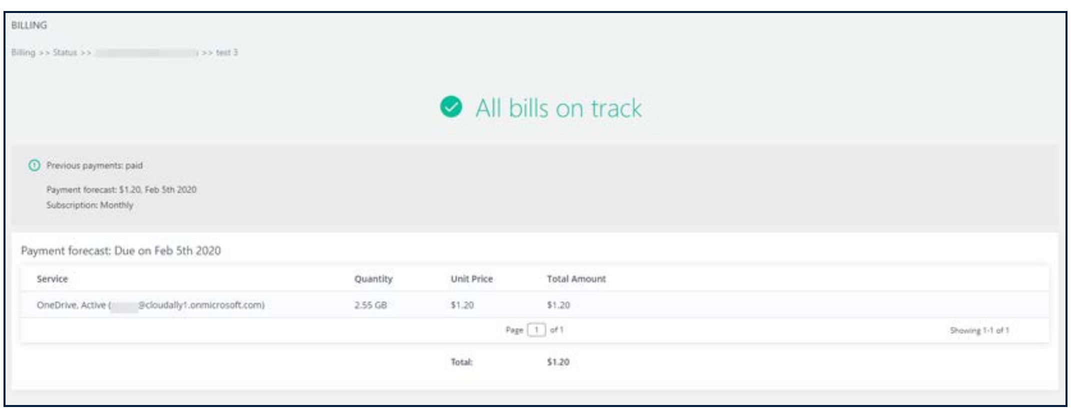
Only the trial accounts will be affected by this action. The accounts that are already subscribed with another type of subscription remain as they are.

6.6 Managing Your Subscriptions

You can check the current billing status of each account directly from the *Billing Status* screen, as well as review the individual billing amounts, next payment forecast, and next payment due date.

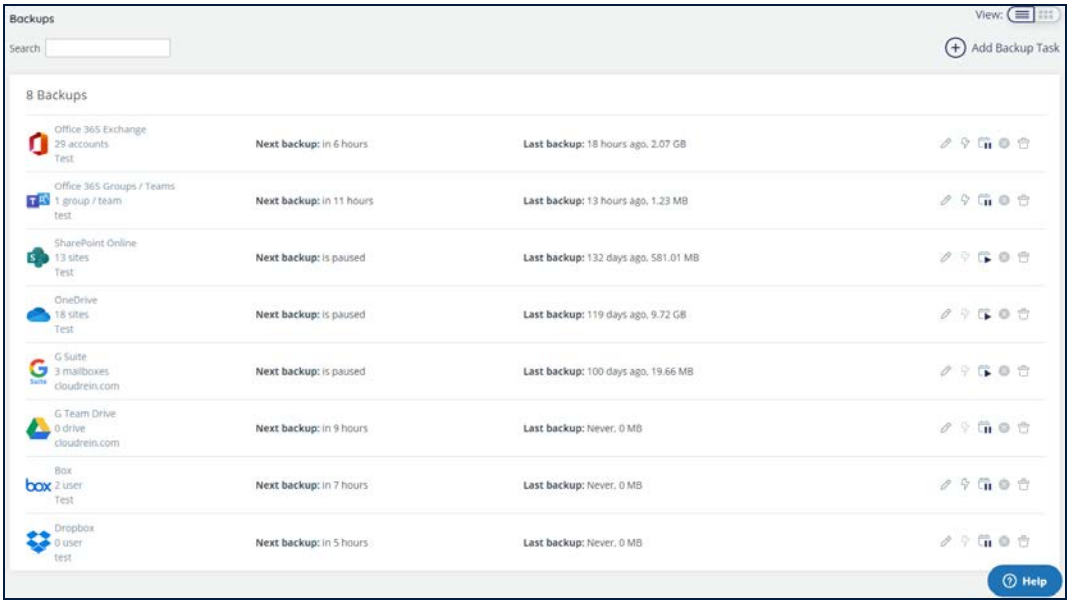
To review the billing status, select **Billing > Status.** The status screen displays each account, the billing status (Current, Due, Past Due, Trial, etc.), and the total billing amount.

Click the account name to drill down to the account level for a detailed view of the billing information.

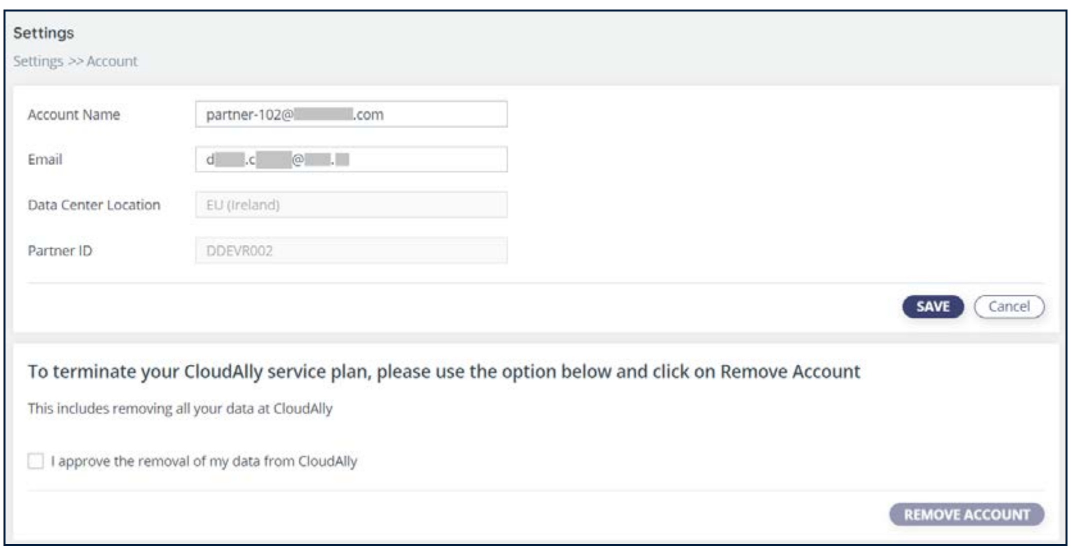


6.6.1 Canceling a User's Subscription

To cancel a user's subscription, drill down into the customer's account from the Dashboard. You should see the customer's portal:



Go to Settings >> Account, check the box "I approve the removal of my data from CloudAlly" and click **REMOVE ACCOUNT**:



IMPORTANT! All data of the removed account will be deleted.

6.6.2 Changing Subscription Type

Contact support if you wish to change your default billing method (credit card or invoice), or if you wish to change a customer's account from monthly to annual or vice versa.

7 Helpful Resources

7.1 About CloudAlly

Founded in 2011 as one of the world's first cloud-to-cloud backup services for Google Apps and Salesforce, CloudAlly led the industry with the first commercially available Microsoft cloud backup in Q1 2014. ISO 27001 and HIPAA certified CloudAlly adheres to industry-standard best practices for information security management, including EU-GDPR compliance.

7.2 Knowledge Base

Search through articles in our Knowledge Base at https://support.cloudally.com to find answers to the most common user questions.

7.3 Support

Support - If you have any question or need further help, do not hesitate to contact us via email at support@cloudally.com. or visit our customer support hub: https://support.cloudally.com

7.4 Privacy

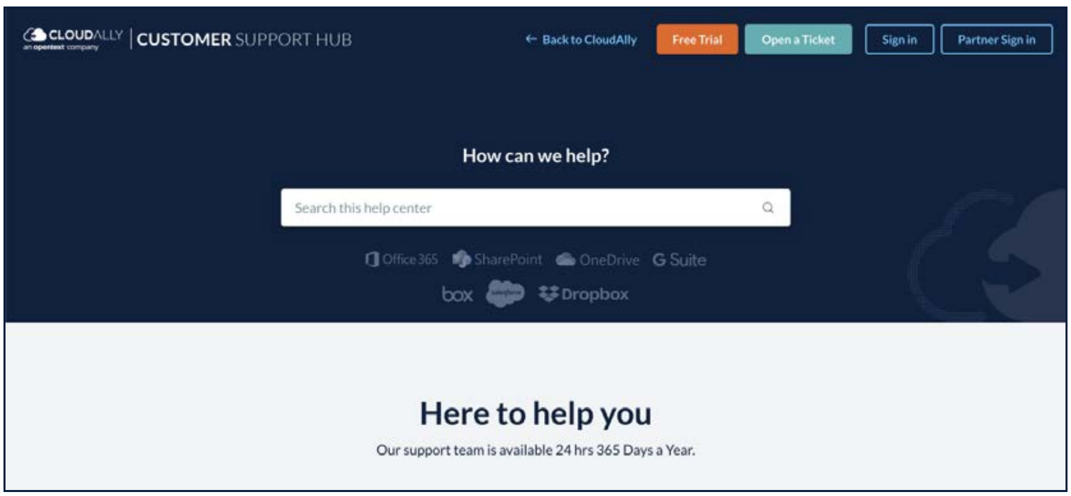
CloudAlly takes privacy seriously. Read our Privacy Policy at https://www.cloudally.com/privacy-policy

7.5 Security

CloudAlly provides a secure online backup solution with internationally recognized accreditation for information security management. Read how we protect your data at https://www.cloudally.com/resources/secure-saas-backup/

8 Support Pages

The Support option at the bottom of the Navigation Panel redirects you to our support hub. In the support hub, you can find articles covering some of the most common questions and providing instructions.



CloudAlly provides multi-channel support options:

Phone Numbers:

USA: +1 (424) 304-1959

AU: +61 2 8599 2233

UK: +44 114 303 2758

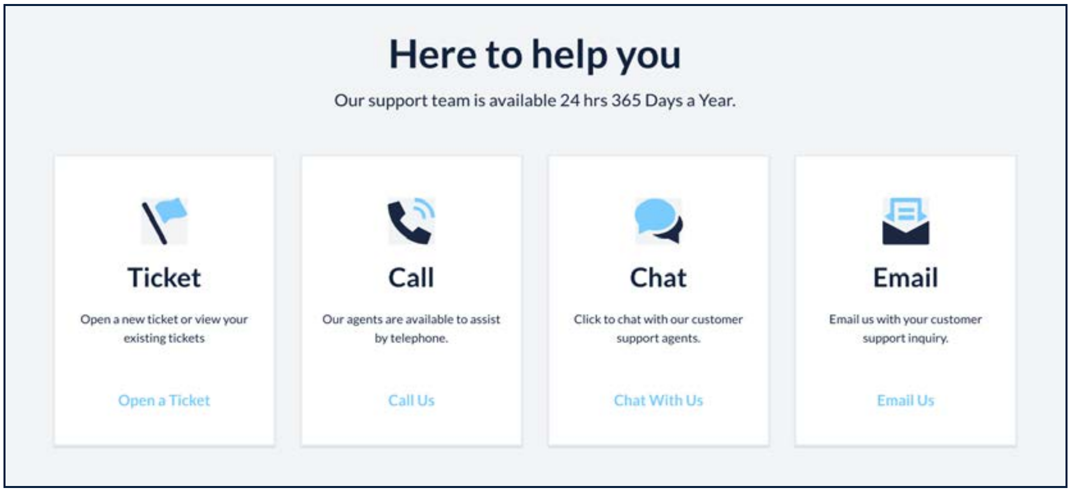
Email Addresses:

General Inquiries: Info@cloudally.com

Customer Support: Support@cloudally.com

Sales: Sales@cloudally.com

Open a ticket and the support team will contact you to help you with any question or problem.



Browse the articles, instructions, and tutorials in the Help Topics section. These materials are especially useful for new users as they explain the settings and procedures of backup activation, management, and recovery.