Partner Portal

User Guide

PP UG CE 23.4.1

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1 Preface

1.1 Welcome

Thanks for being a CloudAlly Partner. 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 Partners 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 Partner Portal Dashboard
- Billing
- Settings
- Adding a New Account

2 Getting Started with Your CloudAlly™ Partner 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 customers, CloudAlly has developed the Partner Portal.

CloudAlly's 2-tier partner portal consists of:

1. A **Partner Portal**, for you to create and manage your customer backup accounts. This includes account setup, backup activation, subscriptions and billing.
2. **Customer Backup Accounts**. By default, you have access to your customers' accounts to manage their backups. You can add the customer to the account to co-manage backups. If needed, CloudAlly can remove your access so that only the customer can access the account. There is no billing information displayed in the customer's 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 Partner 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 Partner Dashboard

The Partner dashboard provides a summary of the following information:

There are three sections:

- Trial Status
- Backup Status
- Billing Status

3.1.1 Trial Status

The Trial Status indicator shows the total number of accounts whose trial periods are active, expiring, or expired.

- The green **In progress** status shows the total number of accounts that have trial periods.

- The orange **Expiring status** shows the total number of trial accounts that are about to expire. The expiring status starts 5 days before the trial period ends. After the trial period is over, the account will be automatically deleted, and the customer will no longer have access to the backup files.
- The red **Expired status** shows the total number of accounts where the trial period ended without the user signing up for a subscription.

3.1.2 Backup Status

The Backup Status indicator shows the number of backups and the status of each:

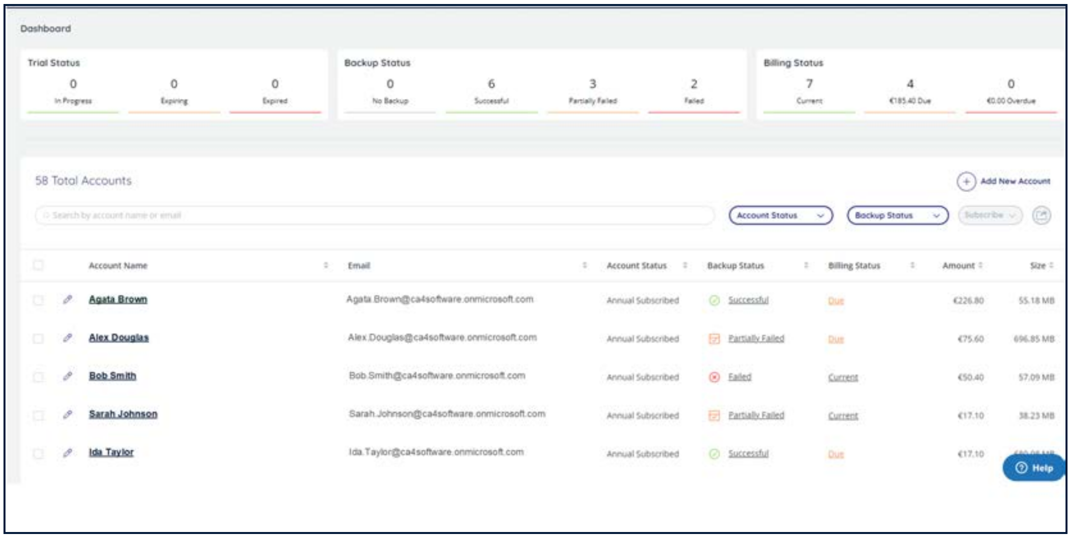
- No backup (grey)
- Successful (green)
- Partially Failed (orange)
- Failed (red)

3.1.3 Billing Status

The Billing Status indicator shows the total number of accounts and the billing status of each.

- The green **Current** status shows the total number of accounts that are fully paid up for the services.
- The orange **Due** status shows the total number of accounts that owe money, and the total amount to be paid.
- The red **Overdue** status shows the total number of accounts that are overdue in their payments, and the total overdue amount.

3.1.4 List of Accounts



Below the dashboard, there is a list of accounts with a variety of information.

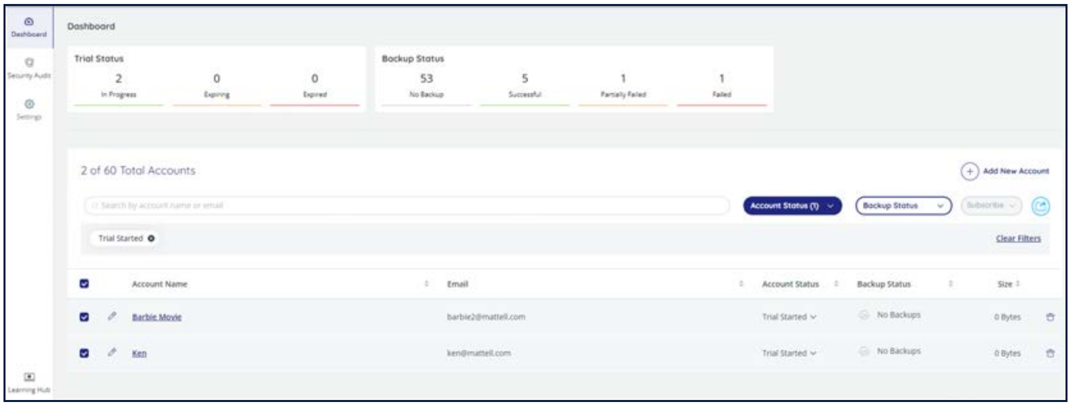
- **Account Name**: the name you have provided while creating a new customer's account.
- **Email**: the email of the customer.
- **Account Status**: show the status of the account. It displays Monthly or Annual.
- **Backup Status**: shows the status of the backups: No Backups, Successful, or Failed.
- **Billing Status**: shows whether the customer is Current, Due, Overdue or None.
- **Size**: the total size of all backups in the customer's account.

3.1.5 Features

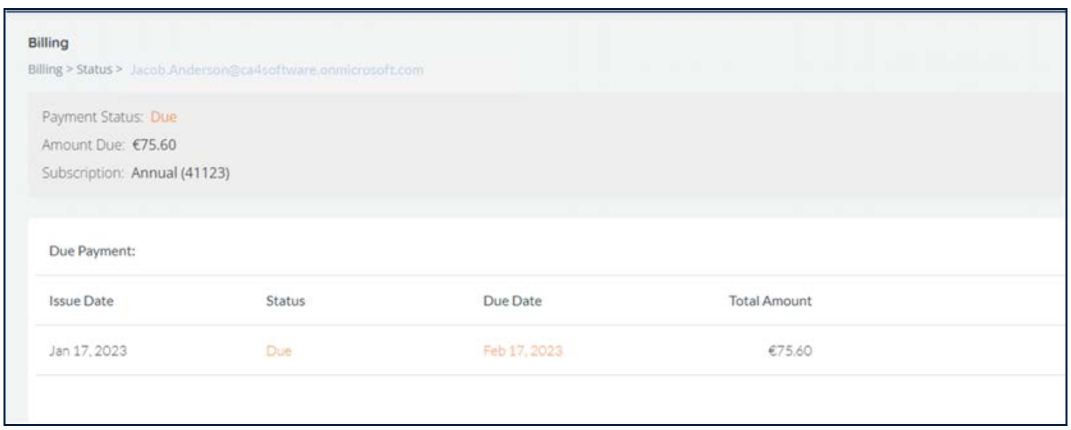
The Partner Portal dashboard enables you to:

- Click through to an existing customer's account by clicking on the highlighted Account Name field.
- Set up a new CloudAlly customer account by clicking **+ Add New Account**.

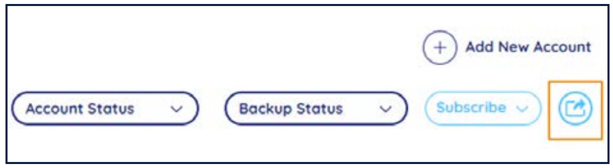
- Delete a trial account before it expires, by clicking on the trash icon at the end of the row.



- Subscribe trial accounts by selecting one or more accounts, and then clicking **Subscribe > Annual or Subscribe > Monthly**
- See the payment details of each customer by clicking their **Billing Status.**



- Export a CSV file that lists all of your customers' entities that were backed up, including the status of each entity (active, inactive, or archived). And for Microsoft Exchange mailboxes, the file will list whether each one is licensed or unlicensed.
  - To export a usage report, select one or more accounts (you can use any of the accounts table filters to select your list), and then click the **Export Usage Report** button, next to the **Subscribe** button.



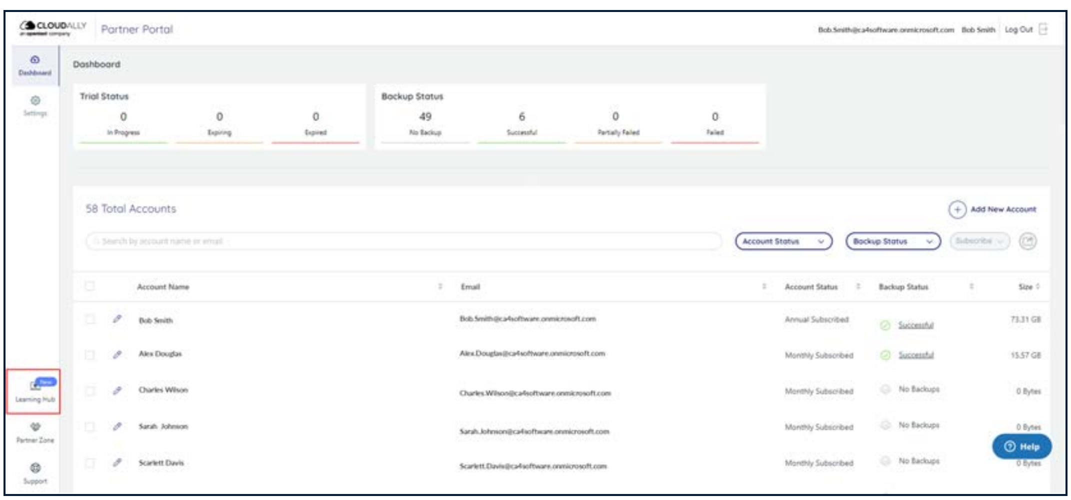
- After you confirm the usage report, you will be sent an email with a zip file attachment containing the CSV file.

Filters

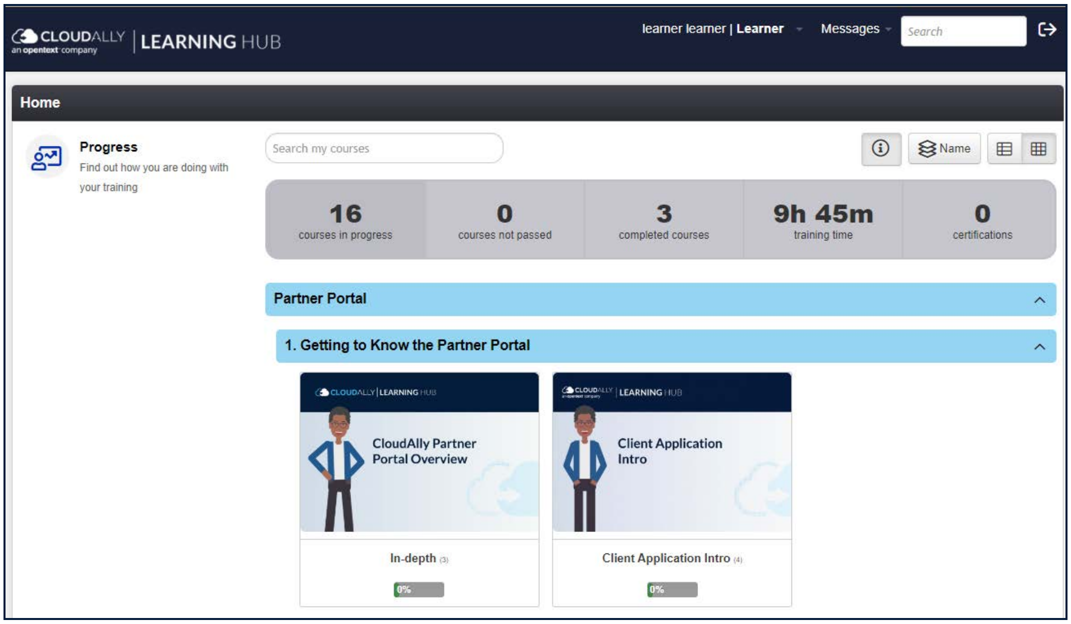
- In the Search field, you can search for an account name or email address.
- You can also filter by:
  - Account Status
  - Backup Status, or
  - Billing Status.

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:

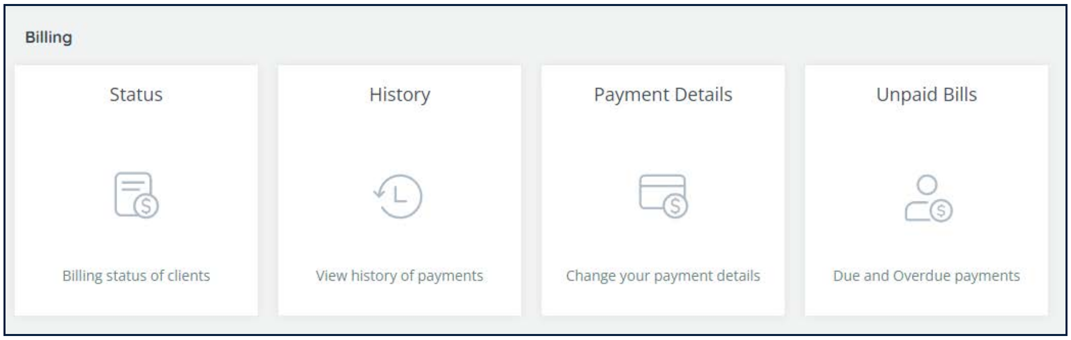


Scroll through the videos, select one that meets your needs, and click play .

4 Billing

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

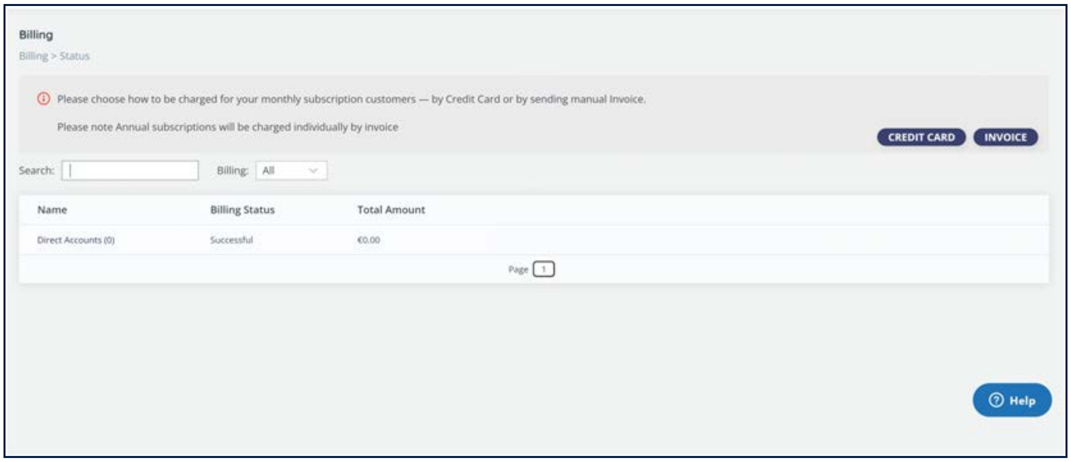
- Status
- History
- Payment Details, and
- Unpaid Bills



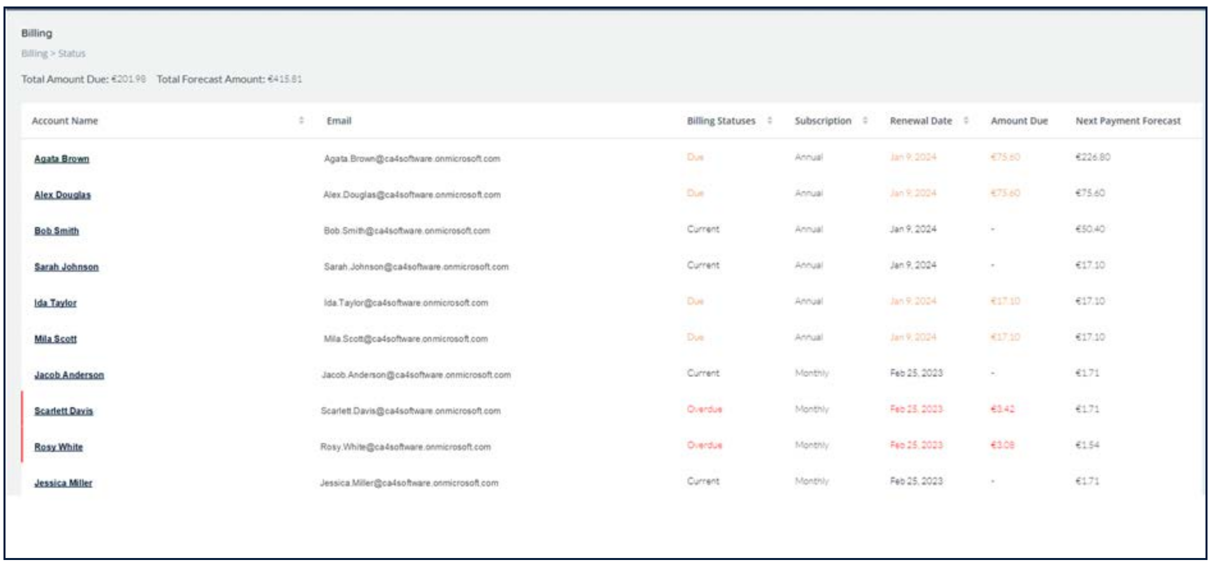
4.1 Status

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 customers, you will see the following *Billing Status* screen. It displays the billing status of all your customers, what type of subscription they have, when their subscription will renew, how much they owe, and how much the system projects they will need to pay during the next billing cycle.



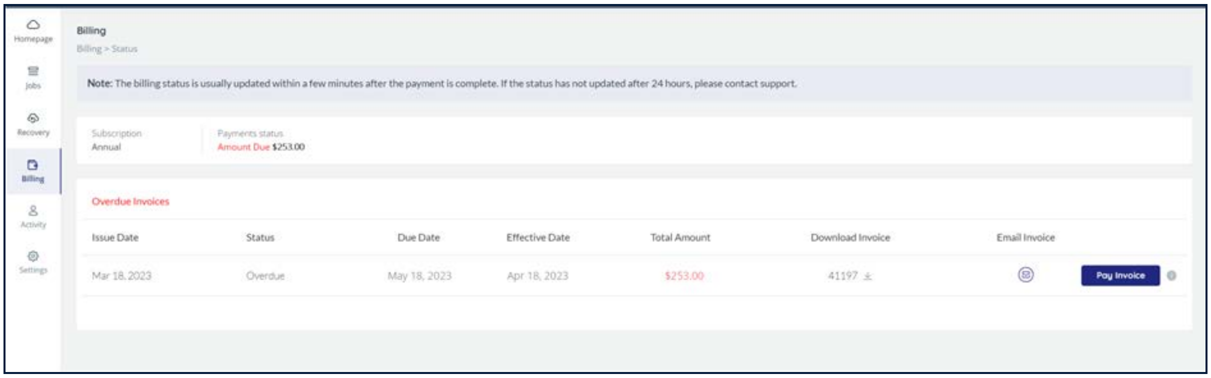
The **totals** summarize how much is due currently, and the total forecast amount for the next billing cycle.

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

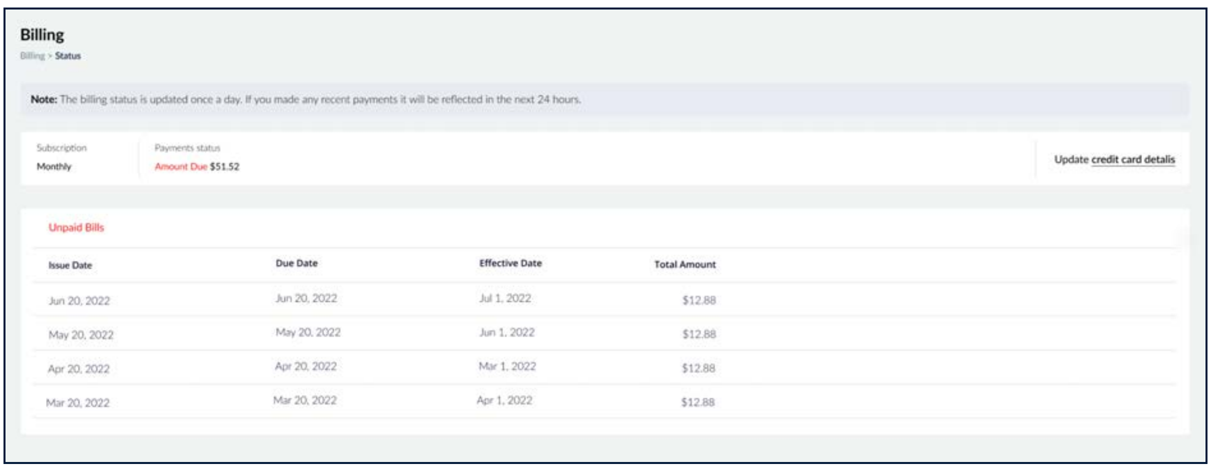
- **Current** means that the customer has paid and does not owe any money.
- **Due** means that within 30 days, their bill will become due.
- **Overdue** means that the due date has passed, or the credit card charge has failed.

- **None** means that the customer is still during the trial period, or within the first month of their subscription, and a bill hasn't been issued yet.

You can drill down to the billing summary by clicking the **Account Name**. Below is an Annual Subscription page:



And this is a monthly subscription page:



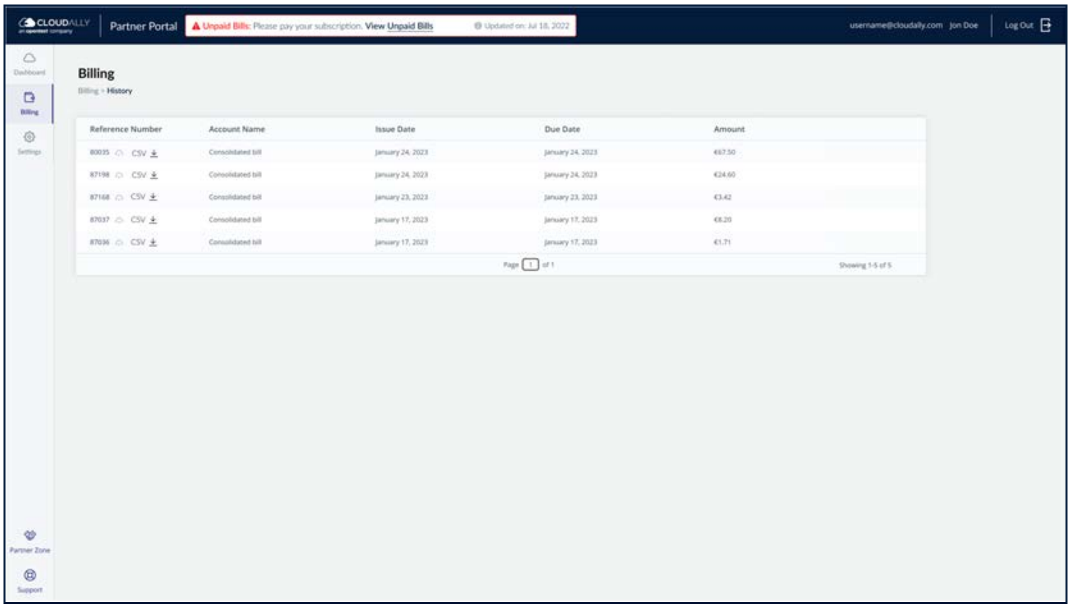
- The **Subscription** field indicates whether a customer has chosen a Monthly or Annual subscription.
- The **Payment Status** field indicates whether the account is up to date or in arrears.
- The **Issue Date** is when the invoice was issued.
- For annual subscriptions, the **Status** field indicates that the account is either Due or Overdue.
- The **Due Date** is when the payment is due.
- The **Effective Date** is the date that the subscription period begins.
- The **Total Amount** summarizes how much is owed.

- For annual subscriptions, you can **download a PDF of your invoice**, you can have CloudAlly send the customer an **email copy of their invoice**, or the customer can pay the invoice directly by clicking **Pay Invoice**.
- For monthly subscriptions, the customer's credit card is automatically charged. If there is a problem, they should **update their Credit Card Details**.

4.2 History

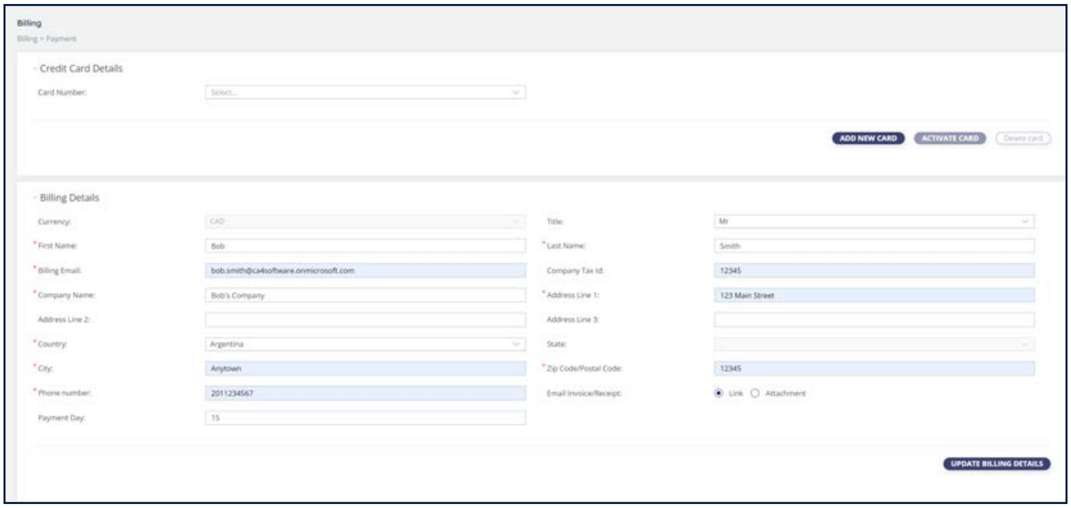
The *History* page allows you to view previous payments, and enables you to download PDFs of your past invoices/receipts by clicking the **Reference Number**.

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.



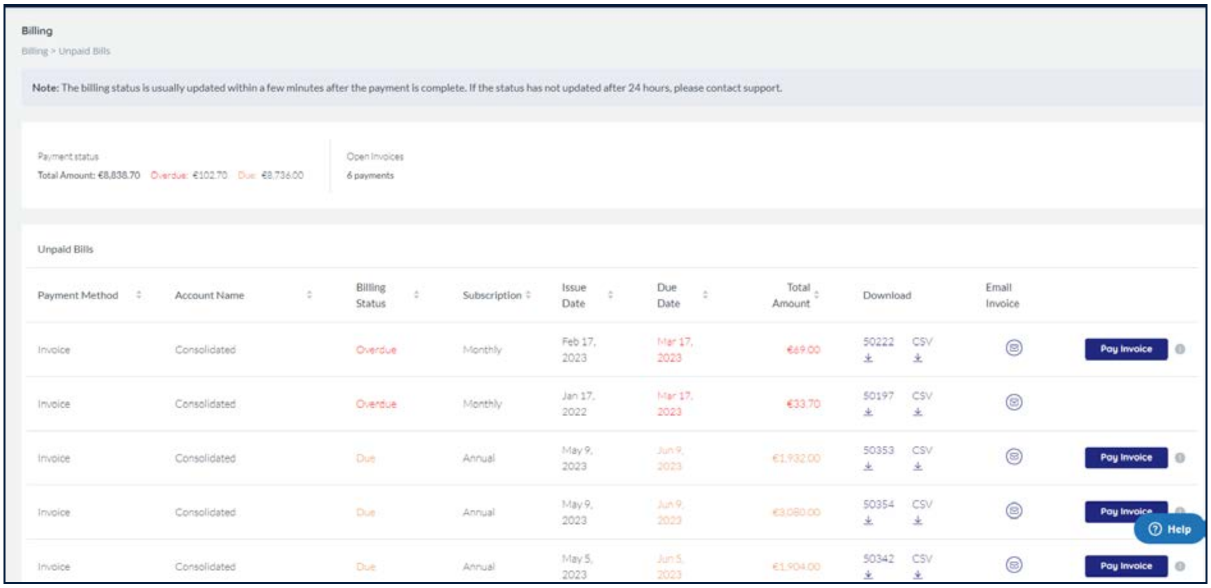
You will enter your billing details as part of your portal setup process. From the *Billing > Payment Details* page, enter your payment details, and click **Update Billing Details**.

To subscribe to accounts by monthly auto-renewing credit card payments, you will also need to complete the credit card information. CloudAlly uses a PCI compliant payment processor and does not store credit card information on the system. Leave this information blank if you want to be billed by monthly or annual invoices.

At the bottom of the *Payment Details* page, you can choose the Payment Day for the consolidated invoices. The invoices for individual monthly subscriptions and annual subscriptions are issued according to the date of their creation.

4.4 Unpaid Bills

The *Unpaid Bills* page looks as follows:



At the top of the *Unpaid Bills* page, there is a summary of:

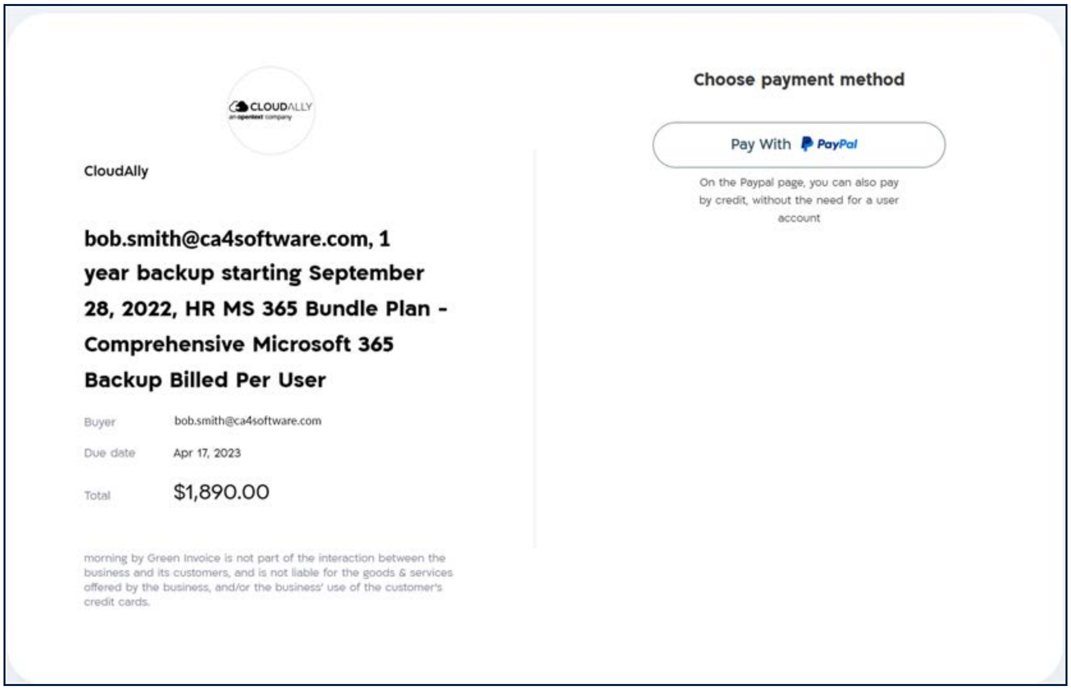
- **Payment Status**: total amount due, with a breakdown of how much is due and how much is overdue
- For those who pay their subscriptions using an invoice: How many **Open Invoices** there are.

> **Note:** If CloudAlly is unable to charge your credit card (e.g., because it has expired), you will be notified by email. Additionally, a message will appear in the application header to remind you to go to the *Unpaid Bills* page so you can review your billing details, and then update your credit card information if necessary.

Below this summary, the *Unpaid Bills* table lists all of the accounts for which payment wasn't received, what the billing status is, what type of subscription they have (annual or monthly), when the bill was issued, when it was due, and the total amount owed.

For subscriptions that pay by invoice, it is possible to either click **Email Invoice** to have the invoice sent to the account, or pay directly by clicking **Pay Invoice**.

If you click **Pay Invoice**, you will be directed to the following screen, where you can pay your invoice via PayPal or by credit card.



If the account name says "Consolidated," this means that numerous customers appear together, either in a single invoice or a credit card charge. It is possible to download a detailed breakdown of each customer, their related services, and the amounts due, in CSV format.

Payment Method	Account Name	Billing Status	Subscription	Issue Date	Due Date	Total Amount	Download	
Invoice	Consolidated	Overdue	Monthly	Feb 17, 2023	Mar 17, 2023	€69.00	50222	CSV

If you are paying by invoice, CloudAlly will send you an invoice by mail, and the following friendly reminder will appear at the top of the application.

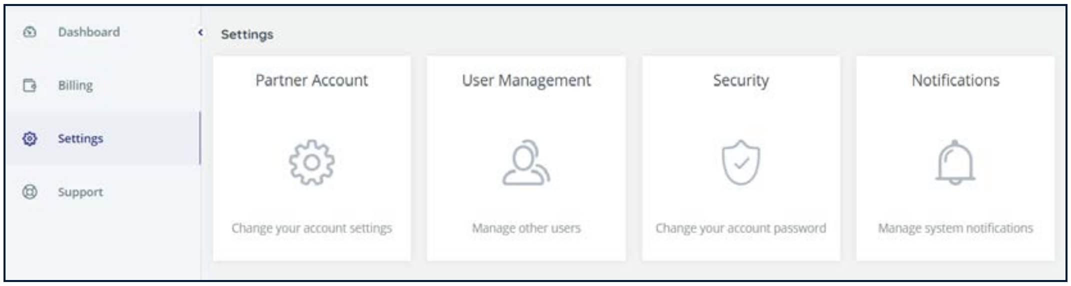
Should you fail to make your payment, you will be reminded with a message like this, on all screens in the Partner Portal:

A Partner may choose to exclude various customers from the Consolidated invoice, so these names appear separately.

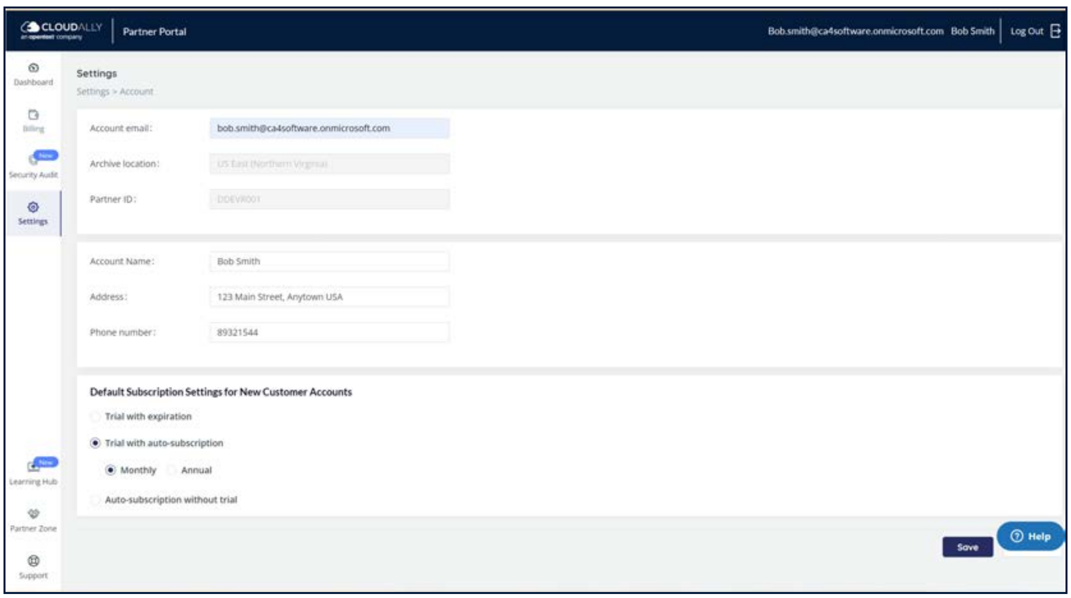
> **Note:** By default, all customers will be aggregated together in a Consolidated Invoice/Credit Card payment. If you prefer to have one or more customers excluded from the Consolidated payment, please contact CloudAlly Support. They will be charged separately.

5 Settings

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



5.1 Partner 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.

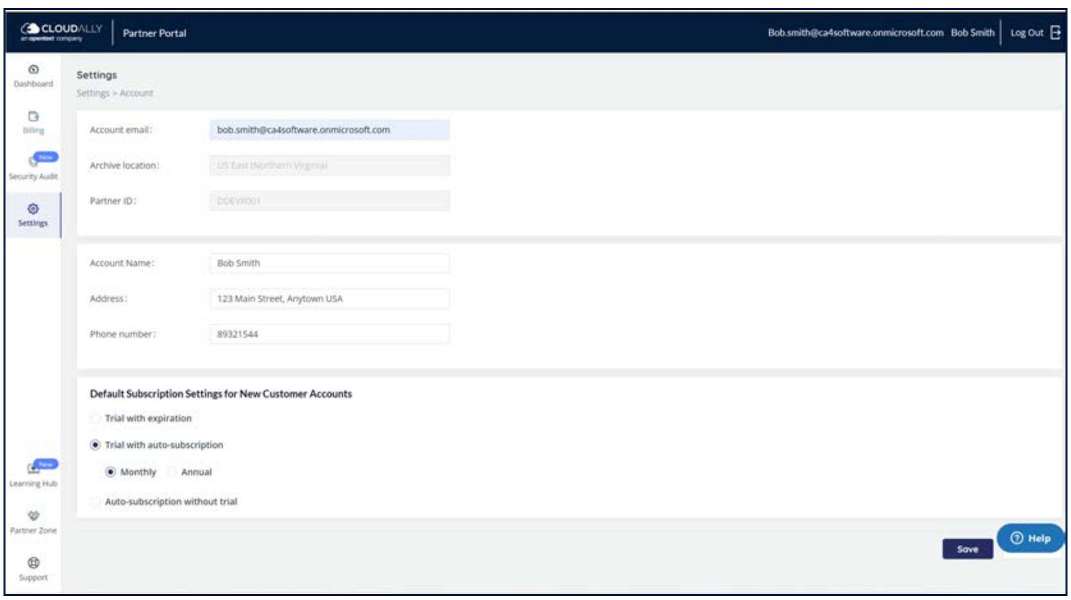
The storage location was set when your portal was configured during the registration process and it will be used as the default when setting up new accounts.

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:

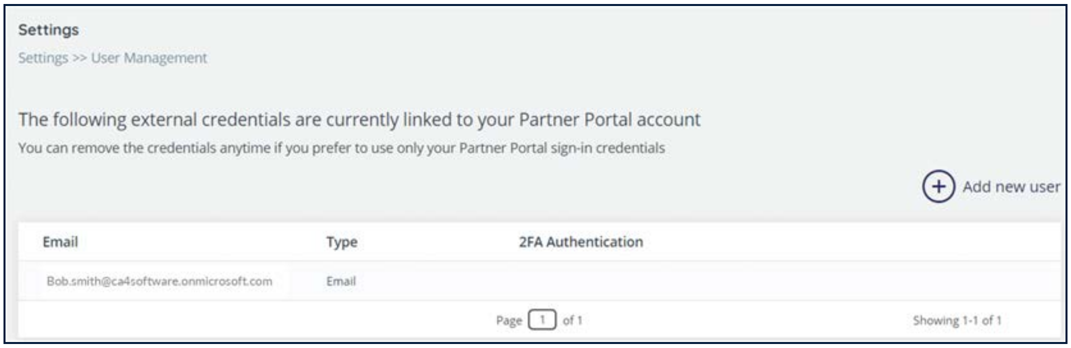
- Trial with expiration
- Trial with auto-subscription (Monthly or Annual billing)
- Auto-subscription without trial



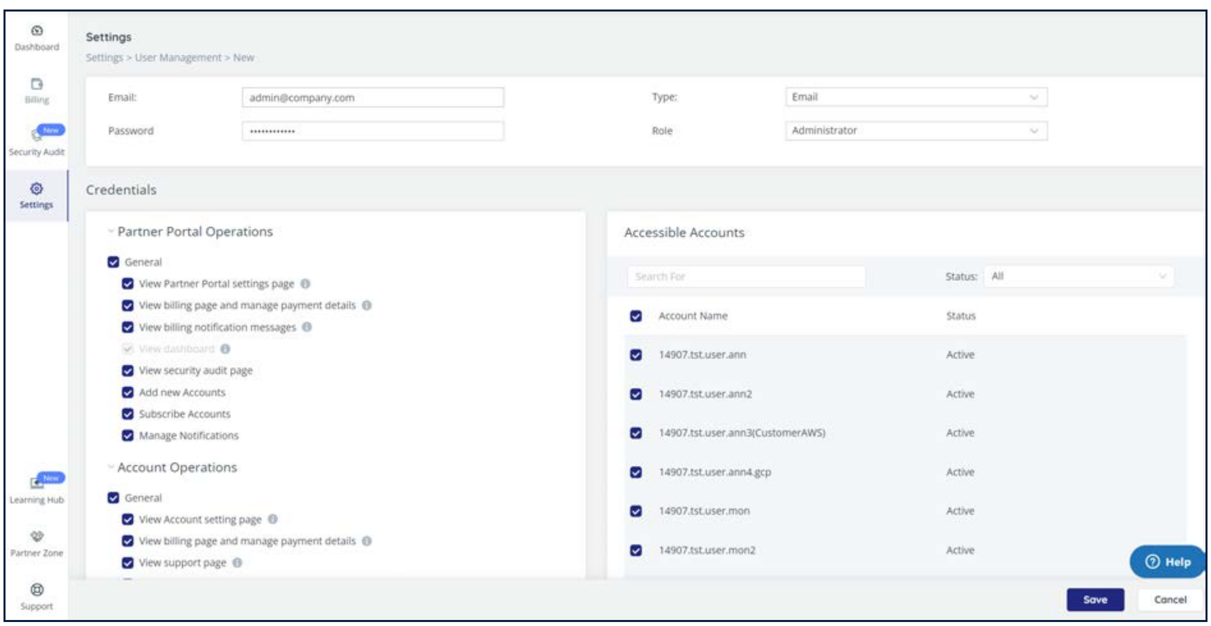
5.2 User Management

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 Partner portal.

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

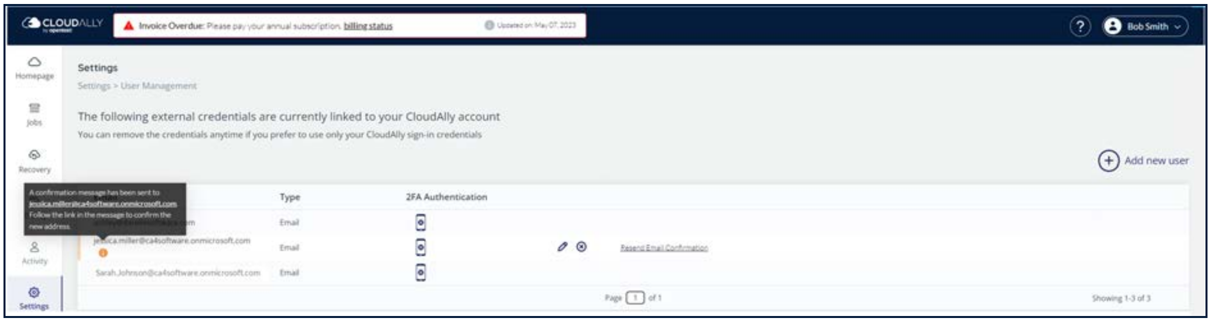


1. Add the new user's email address.
2. Select the type of credentials from the drop-down list: Azure, Email or Google+.
3. If you selected Email, add the user's password.
4. Select the user's role from the drop-down list.
    a. If you choose Administrator, then all of the Operations and Accessible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



To save changes, click **SAVE**.

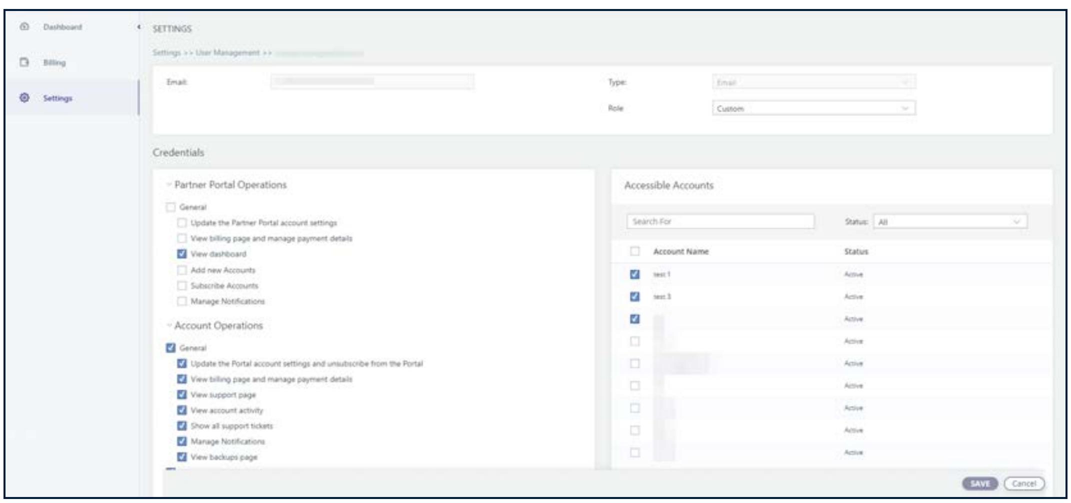
You will be returned to the *Settings* page. To complete the process, the user must confirm their email address using the link sent via email. This is a security measure, which ensures that the user's email address is valid.



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 Partner 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.

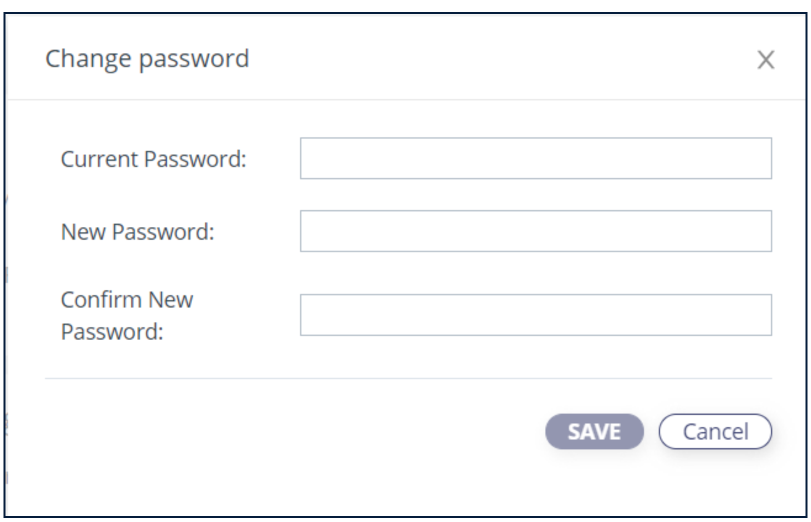
You can enable the password expiration option for all your users – the expiration policy will be enforced on their accounts.

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.



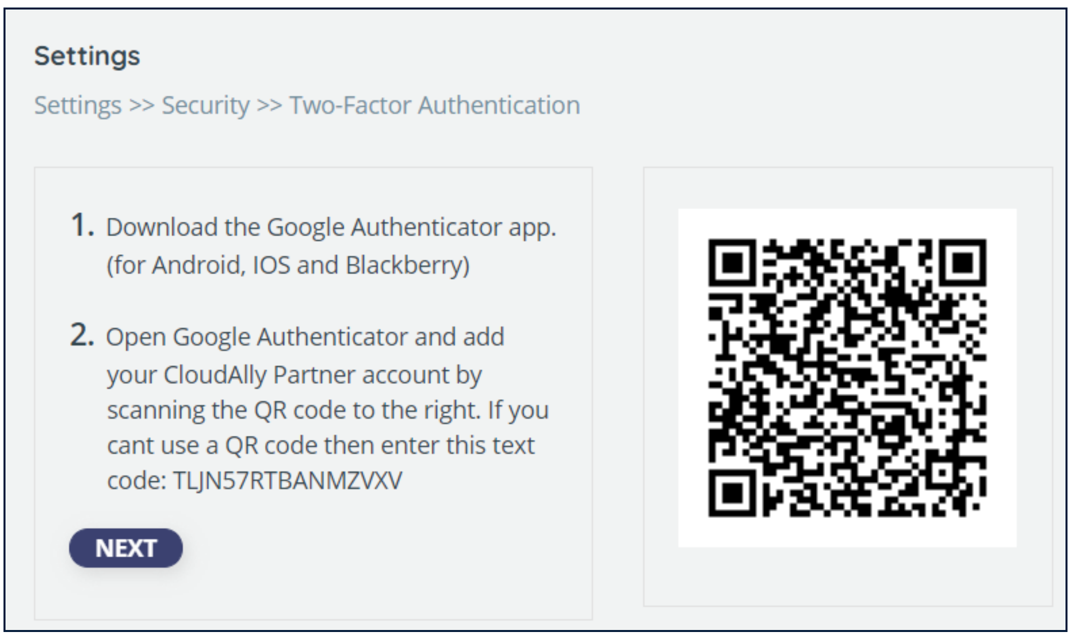
3. Enter the current password in the **Current Password** field.
4. Enter the new password in the **New Password** field.
5. Re-enter the new password in the **Confirm New Password** field.
6. Click **SAVE**. You can now use this password to access your Partner Portal account.

5.3.2 Two-Factor Authentication

Two-factor authentication provides additional security to your CloudAlly account and your backup data. Perform the following procedure to enable two-factor authentication:

1. Click **ACTIVATE 2FA** element from the Navigation Panel of the CloudAlly web application.

The Two-Factor Authentication page is displayed.



2. Download an Authenticator app, depending on your platform (Android or iOS).
3. Open the Authenticator app and add your CloudAlly account by scanning the QR code provided in the CloudAlly web application.

If you cannot use a QR code, then enter the text code provided in the CloudAlly web application.

A six-digit code is generated.

4. Click **Next**.

Enter the 6-digit code that the application generated.

5. Click enable to complete the process of activating the Two-factor authentication.

From now on, every time you sign in to your CloudAlly account, you are asked to enter a 6-digit code from your authentication app, after you click **SIGN IN**. Click **VERIFY** to verify the code and access the application.

5.3.3 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

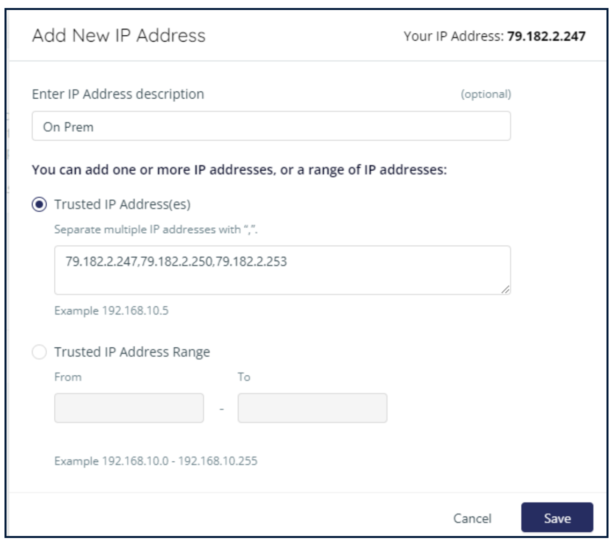
To enable IP restrictions in your account, first create the list of trusted IP addresses.

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

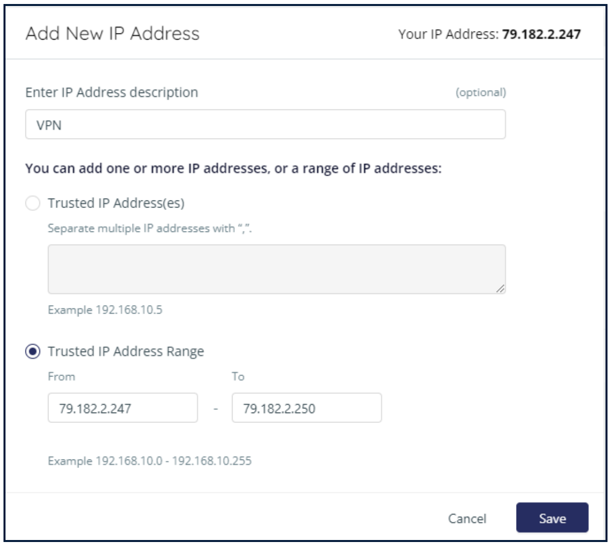
1. In the *Settings* panel, click **Security**, and then **IP Restrictions**.

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

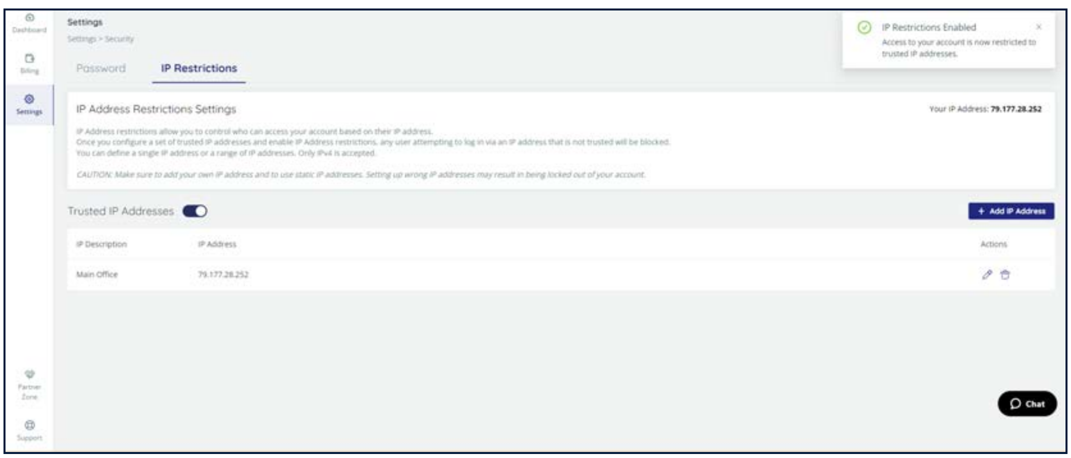
   a. Enter individual addresses separated by commas, and an optional description.



   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.



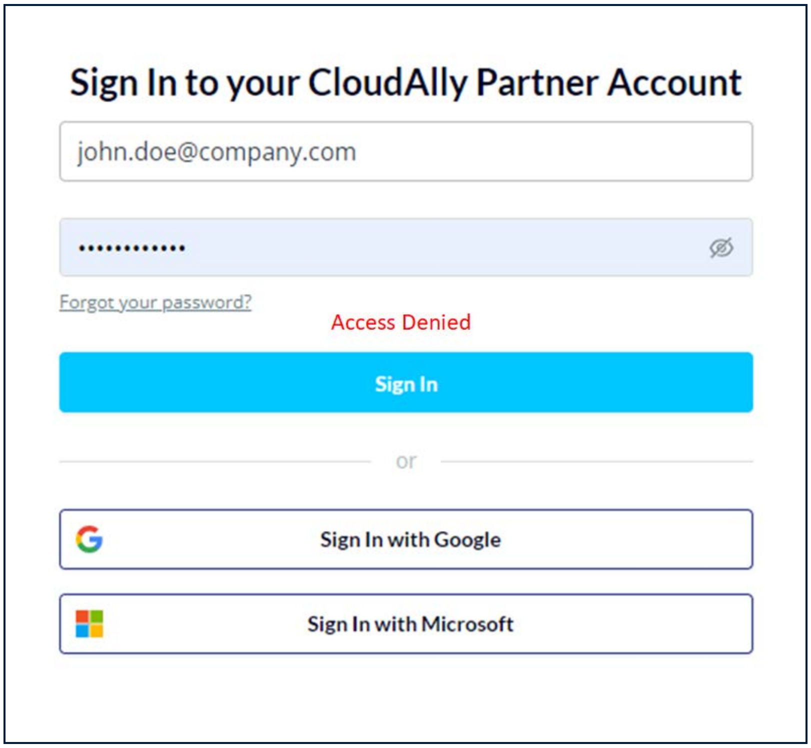
You can edit your list of addresses by clicking the pencil icon, or delete ones that you no longer want on your trusted list by clicking the trash icon.

> **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.

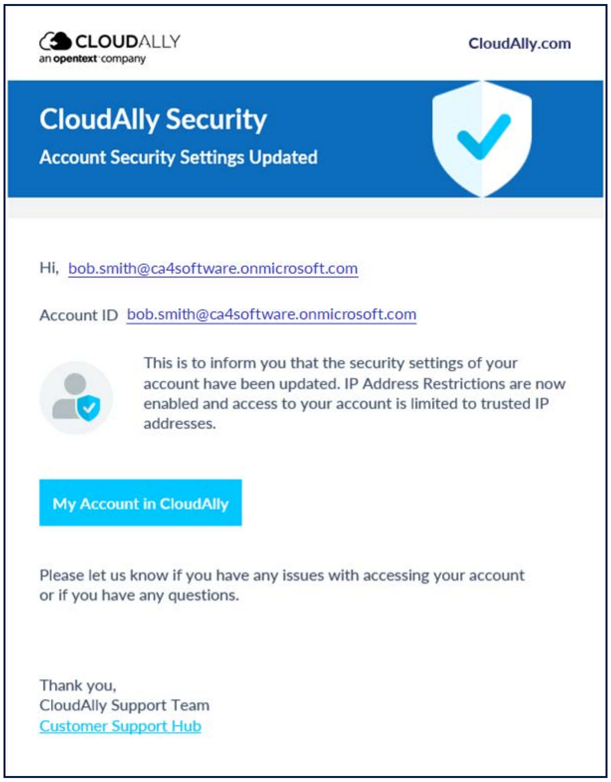
Blocking Access

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



5.3.4 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 customers 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

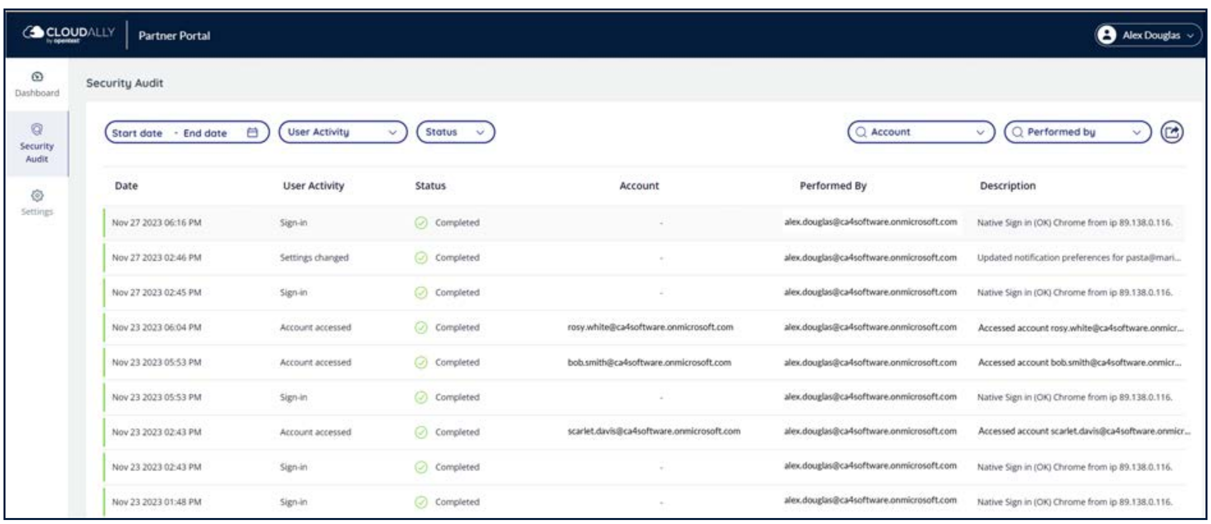
- Change billing details, such as credit card update
- Notification, such as export security audit

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:

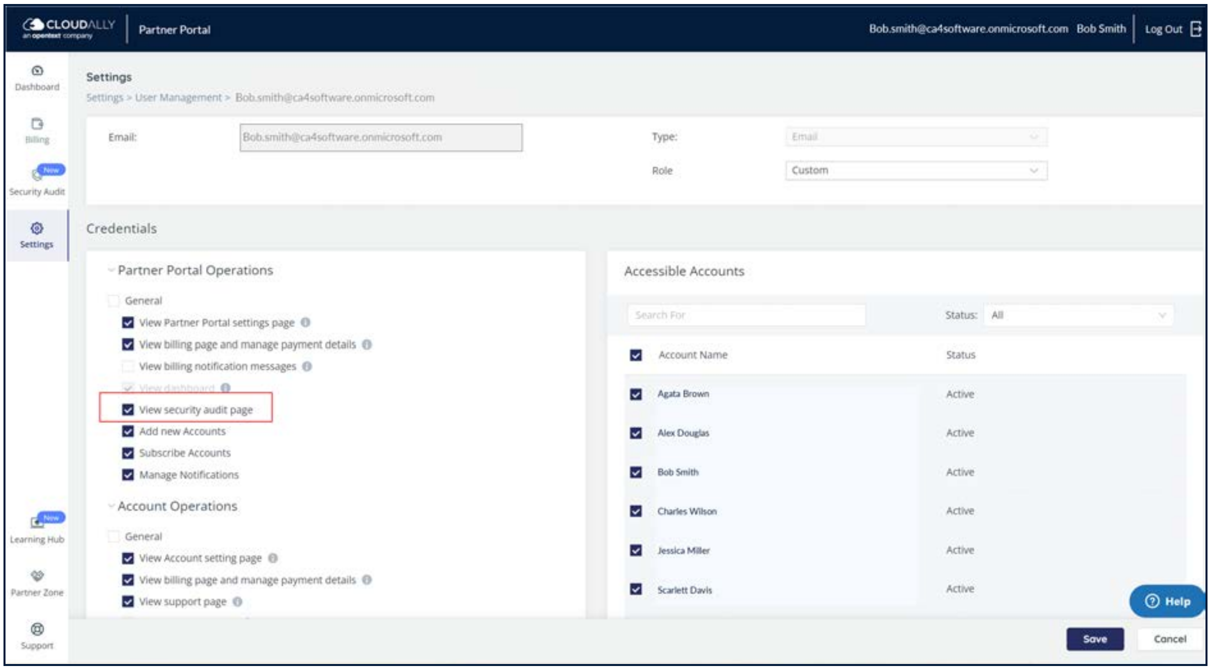
- Date range
- User activity type - sign-in, account accessed, billing details update, permissions changed, settings changed, notification, and trial canceled.
- Status
- Account - alphabetical list of all Partners' accounts,
- and the user performing the activity.

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



5.4.1 Setting Security Audit Permissions

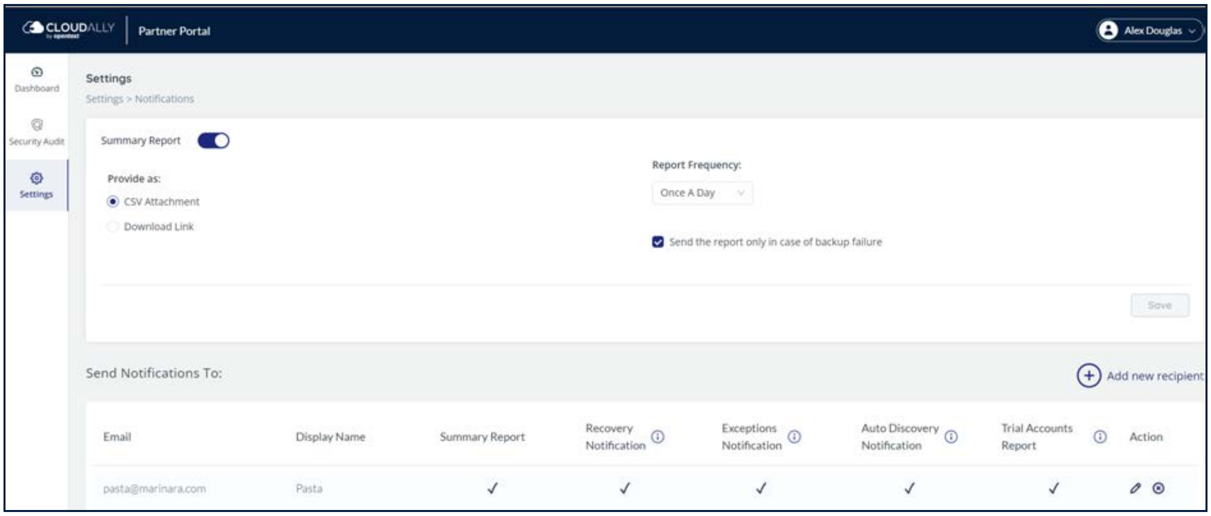
You can restrict access to the Security Audit page by removing the checkmark from the *View Security Audit* option for a particular user on the User Management page.



5.5 Notifications

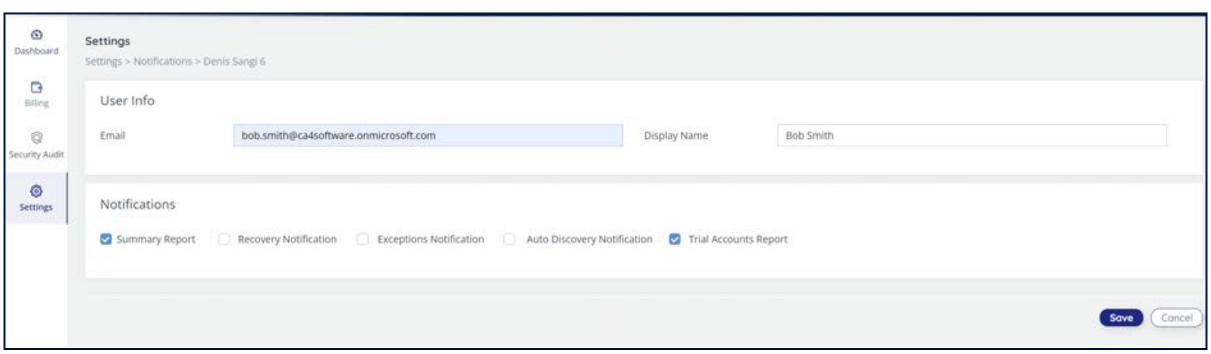
This page provides a set of tools for control over the flow of the notifications including the backup summary report, restore and export recovery notifications, trial accounts report, and backup exception notifications. You can control the general settings of the notification, such as the frequency of reports (daily, weekly or monthly), the reporting type (full report or exceptions only), 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.

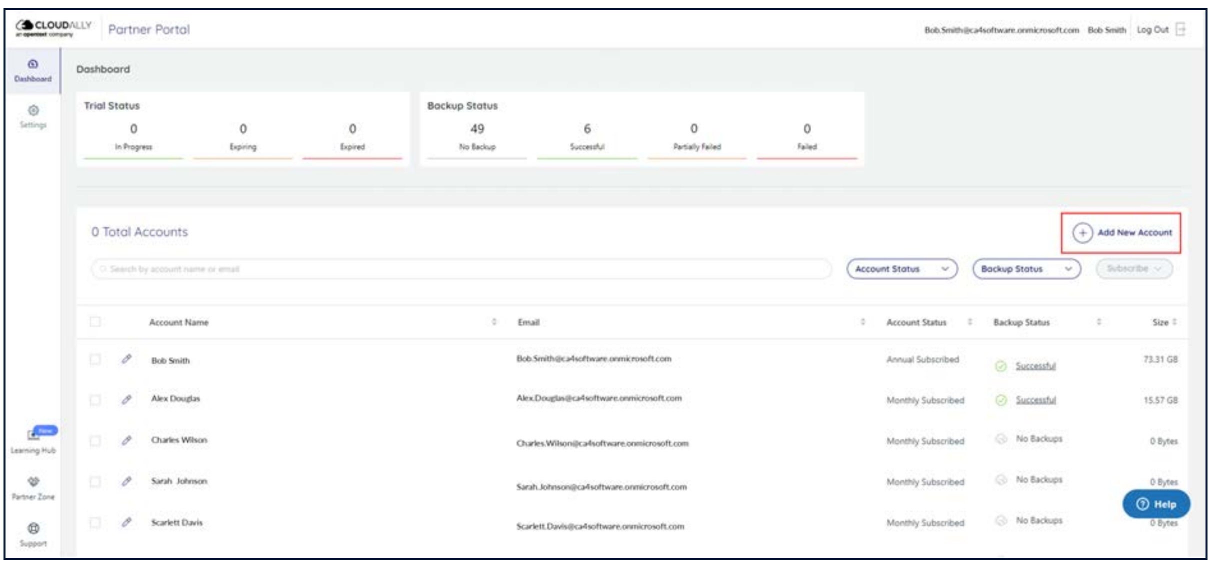
6 Adding a New Account

From the Partner Portal dashboard, you can create a new account for each customer 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.

6.1 Adding a New Customer Account

From the Partner Dashboard, click **+ Add New Account**.

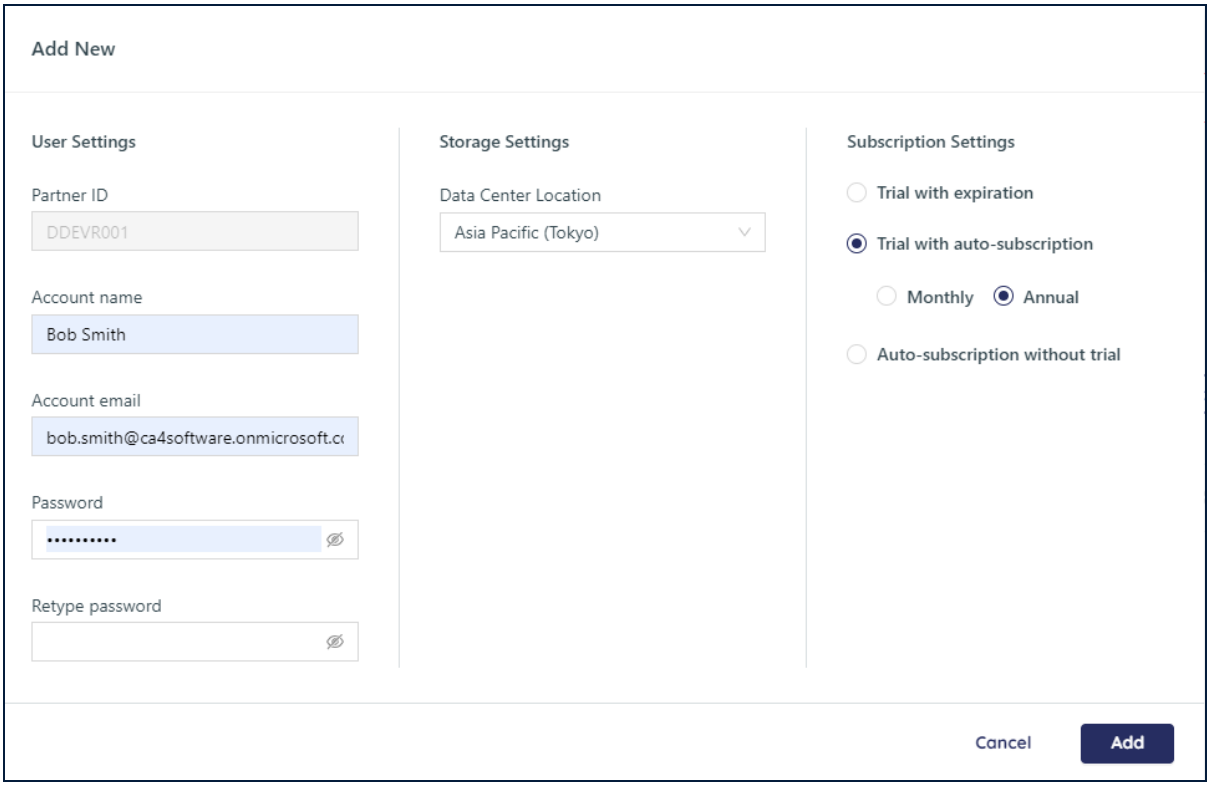


This will take you to the *Add New* settings screen.

6.1.1 User Settings

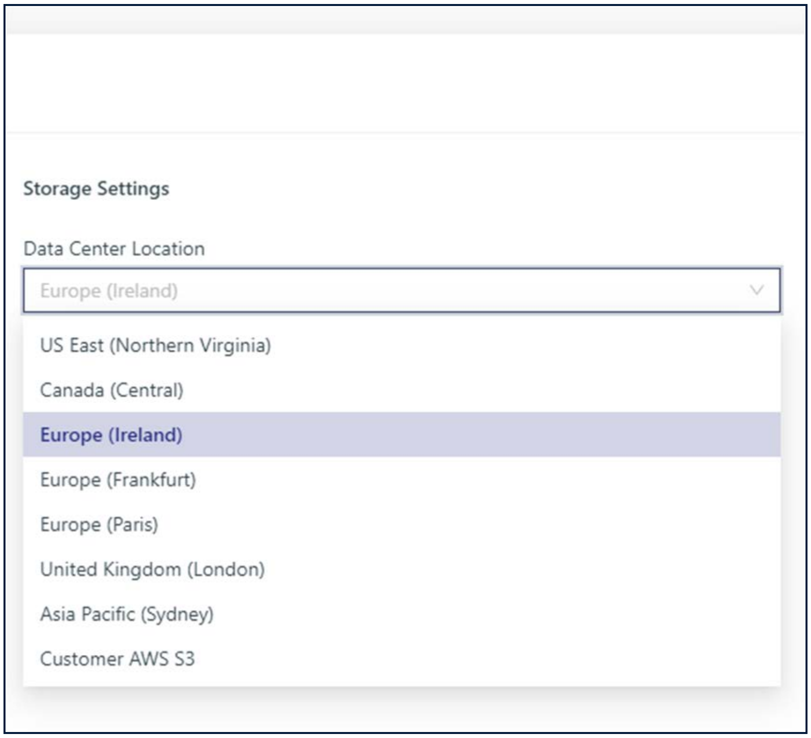
Complete the following fields about your new user:

- Account Name
- Account email
- Password



6.1.2 Storage Settings

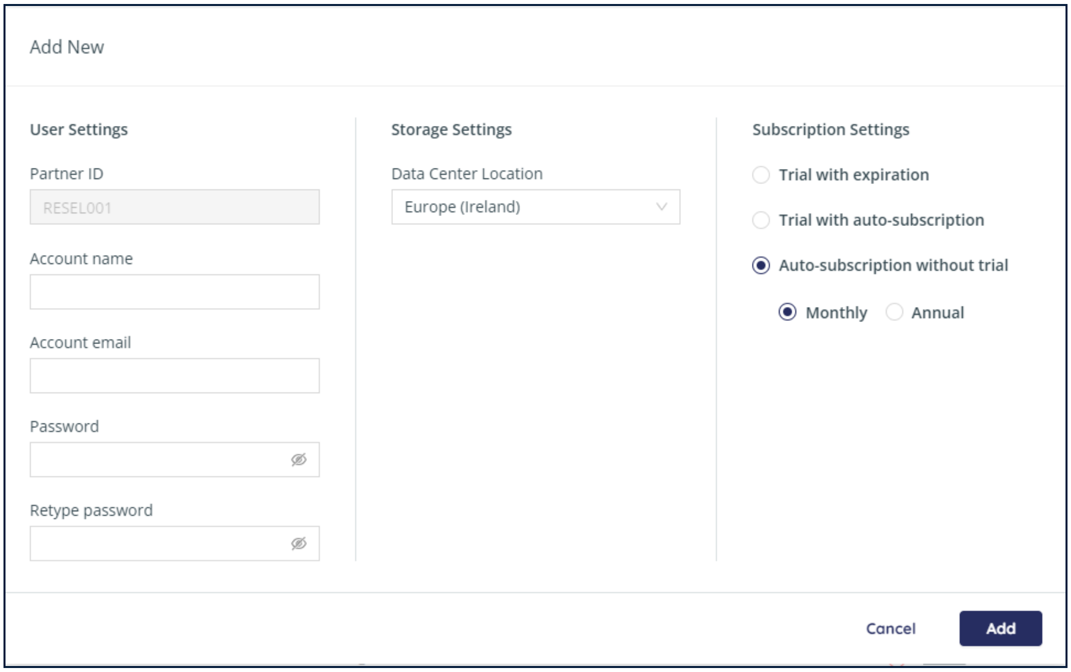
Select the Data Center Location. If you chose to store the customer's data in one of the custom storage options (Customer AWS S3, AWS S3 Compatible, Google Cloud, or Azure), you will be asked to provide the credentials for the connection.



6.1.3 Subscription Settings

After the 14-day trial period, users are granted a 7-day grace period to subscribe, after which time their backed up data will be deleted. After receiving requests from Partners whose users didn't realize that they needed to actively subscribe in order to preserve their data, CloudAlly now presents three subscription type options.

1. Trial for 14 days, with an expiration after the trial.
2. Trial for 14 days, with auto-subscription after the trial. There are two billing methods:
    a. Monthly
    b. Annually
3. No trial period - auto-subscription directly. There are two billing methods:
    a. Monthly
    b. Annually



2. Click **Add** to complete the new trial account setup.

A new account has been created, and the account will be added to your dashboard.

6.2 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 Partner 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.

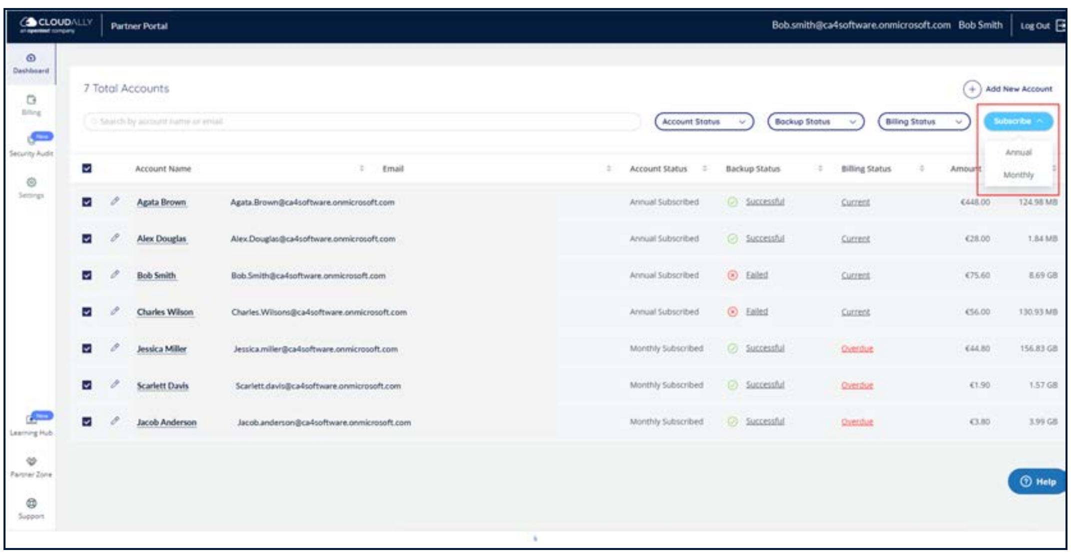
6.3 Subscribing a Trial Account

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**:



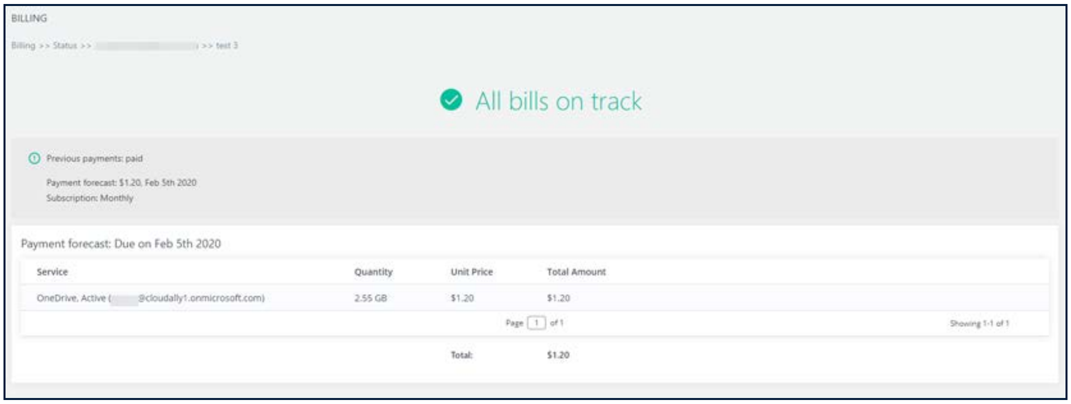
Only the trial accounts will be affected by this action. The accounts that are already subscribed with another type of subscription remain as they are.

6.4 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.

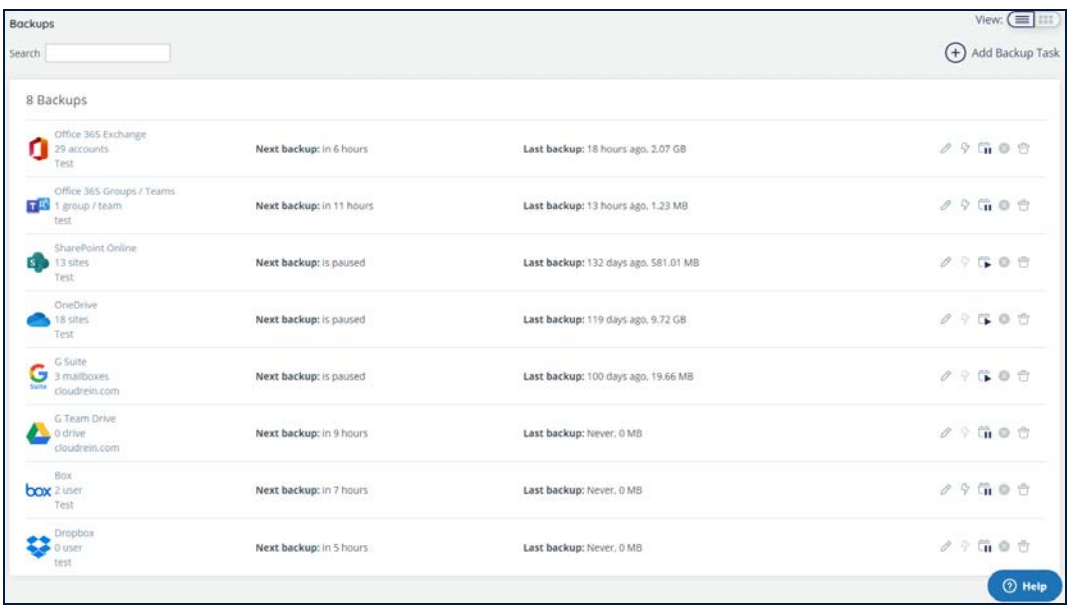
To review the billing status, select **Billing > Status.** The status screen displays each account, the billing status (Current, Due, Past Due, Trial, etc.), and the total billing amount.

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

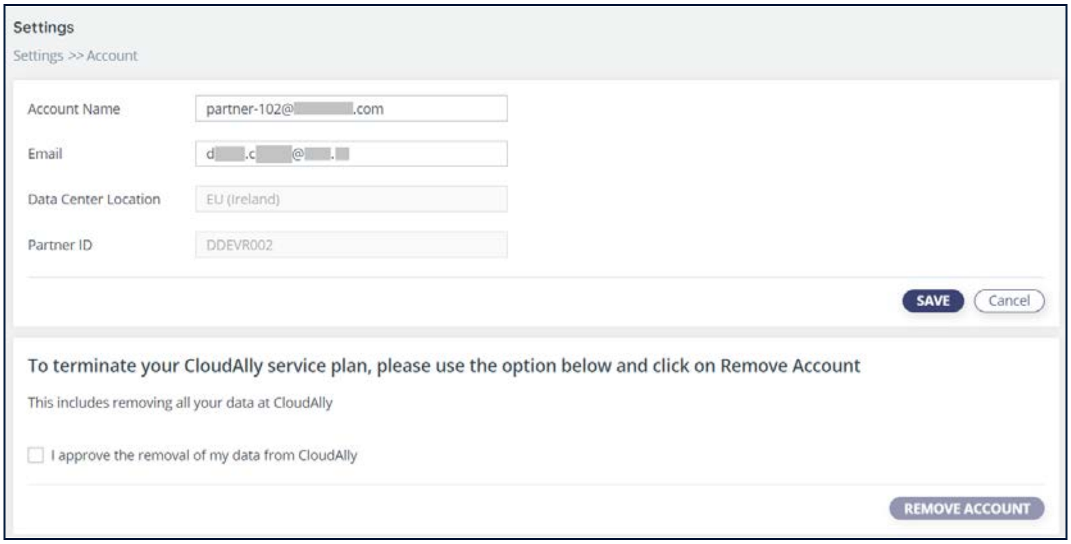


6.4.1 Canceling a User's Subscription

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.

6.4.2 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

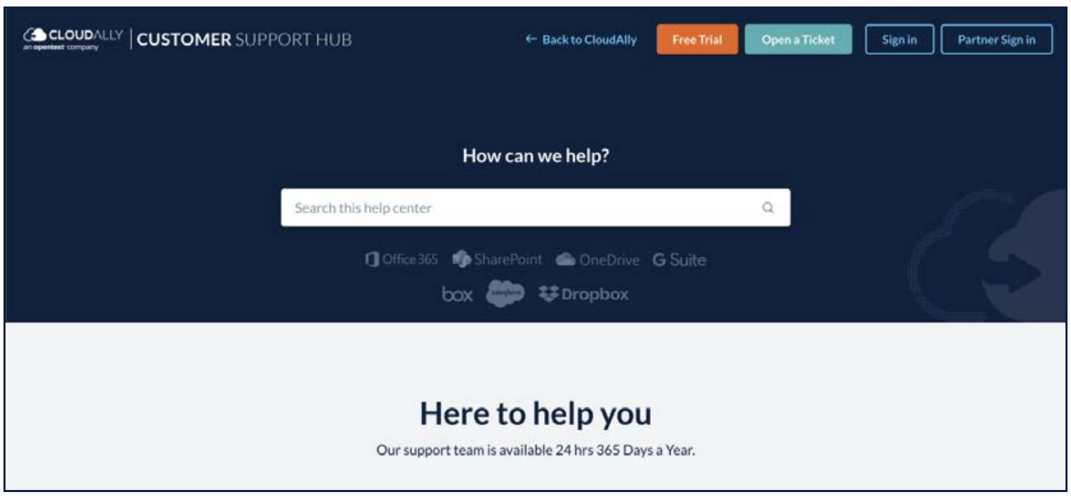
CloudAlly takes privacy seriously. Read our Privacy Policy at https://www.cloudally.com/privacy-policy

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

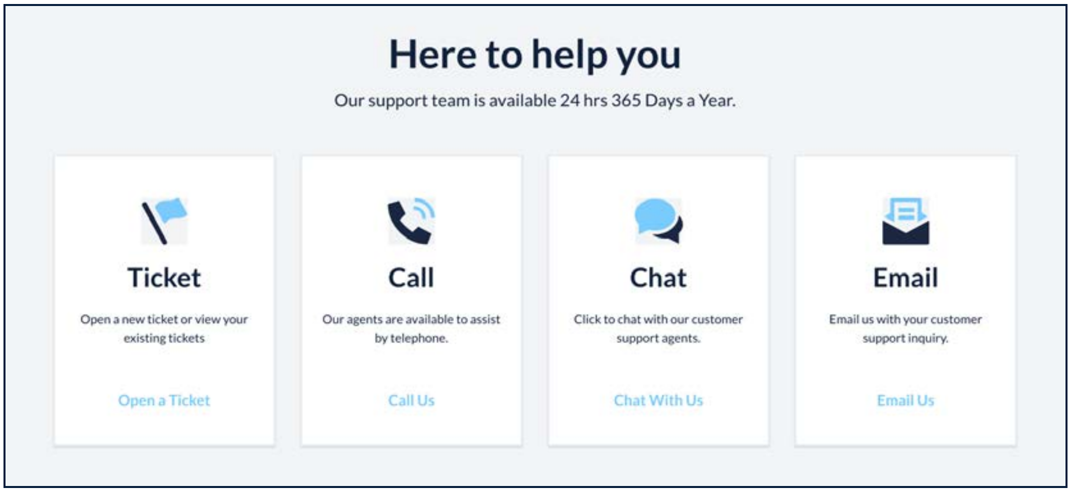
Email Addresses:

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.