



For Distributors

Distributor Portal User Guide

DP UG - CE 24.4.1

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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.

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 Partners.

- If you are a **Distributor**, you purchase your services from CloudAlly, and resell them to Managed Service Providers (MSP) or Value Added Resellers (VAR).
- If you are an **Indirect Partner**, you are an MSP or VAR who purchases your services from a Distributor.
- If you are a **Direct Partner**, you are an MSP, VAR, or an Affiliate who purchases your services directly from CloudAlly.

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

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 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:

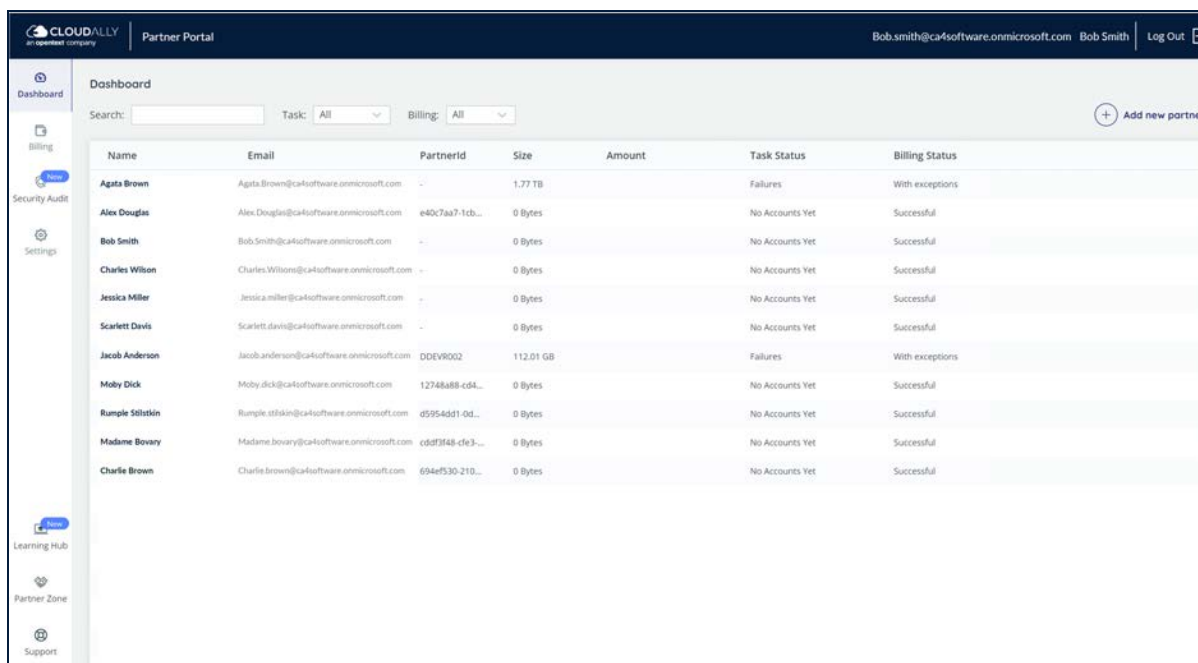
- Dashboard
- Billing
- Settings
- Learning Hub
- Partner Zone
- Support

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.



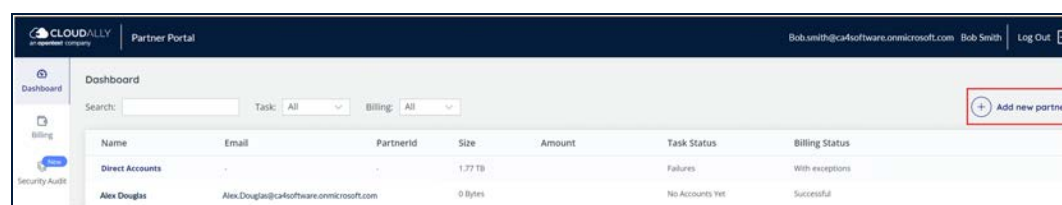
The screenshot shows the CloudDally Partner Portal Dashboard. The top navigation bar includes the CloudDally logo, the text 'Partner Portal', and the user's email 'Bob.smith@ca4software.onmicrosoft.com' with a 'Log Out' button. The left sidebar contains navigation links: Dashboard, Billing, Security Audit, Settings, Learning Hub, Partner Zone, and Support. The main content area has a search bar, filters for 'Task' and 'Billing', and an '+ Add new partner' button. Below these is a table with the following data:

Name	Email	Partnerid	Size	Amount	Task Status	Billing Status
Agata Brown	Agata.Brown@ca4software.onmicrosoft.com	-	1.77 TB		Failures	With exceptions
Alex Douglas	Alex.Douglas@ca4software.onmicrosoft.com	e40c7aa7-1cb...	0 Bytes		No Accounts Yet	Successful
Bob Smith	Bob.Smith@ca4software.onmicrosoft.com	-	0 Bytes		No Accounts Yet	Successful
Charles Wilson	Charles.Wilson@ca4software.onmicrosoft.com	-	0 Bytes		No Accounts Yet	Successful
Jessica Miller	Jessica.Miller@ca4software.onmicrosoft.com	-	0 Bytes		No Accounts Yet	Successful
Scarlett Davis	Scarlett.Davis@ca4software.onmicrosoft.com	-	0 Bytes		No Accounts Yet	Successful
Jacob Anderson	Jacob.Anderson@ca4software.onmicrosoft.com	DDEV002	112.01 GB		Failures	With exceptions
Moby Dick	Moby.Dick@ca4software.onmicrosoft.com	12748a88-cd4...	0 Bytes		No Accounts Yet	Successful
Rumple Stikin	Rumple.Stikin@ca4software.onmicrosoft.com	d5954d01-0d...	0 Bytes		No Accounts Yet	Successful
Madame Bovary	Madame.Bovary@ca4software.onmicrosoft.com	c6d83f48-d63...	0 Bytes		No Accounts Yet	Successful
Charlie Brown	Charlie.Brown@ca4software.onmicrosoft.com	694ef530-210...	0 Bytes		No Accounts Yet	Successful

3.1.1 Features

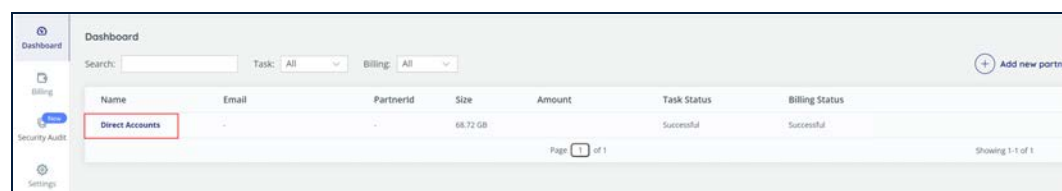
The Distributor Portal dashboard enables you to:

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



This screenshot shows the same dashboard as above, but with the '+ Add new partner' button in the top right corner highlighted by a red box.

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



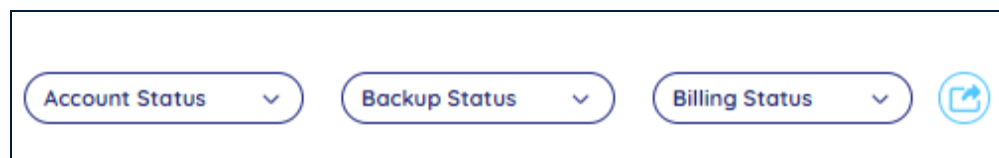
This screenshot shows the dashboard with the 'Direct Accounts' link in the left sidebar highlighted by a red box. The table below it shows one entry:

Name	Email	Partnerid	Size	Amount	Task Status	Billing Status
Direct Accounts	-	-	68.72 GB		Successful	Successful

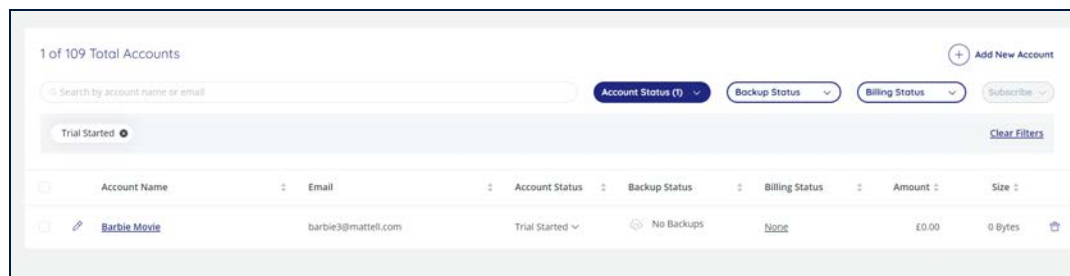
At the bottom of the table, it says 'Page 1 of 1' and 'Showing 1-1 of 1'.



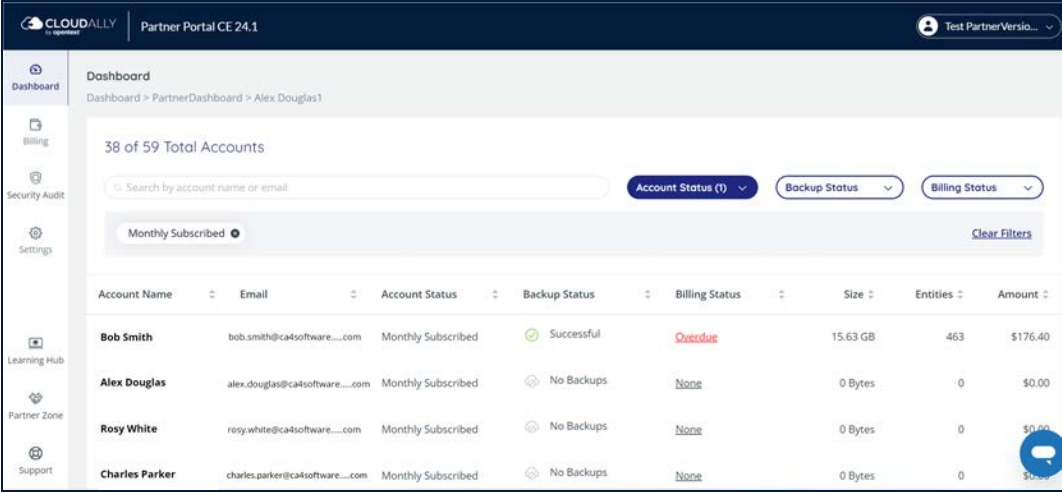
- Export a CSV file that lists all of your Partners' entities that were backed up, including the status of each entity (active, inactive, or archived). And for Microsoft Exchange mailboxes, the file will list whether each one is licensed or unlicensed.
 - To export a usage report, select one or more 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 **Billing Status** button.



- After you confirm the usage report, you will be sent an email with a zip file attachment containing the CSV file.
- Delete a trial account before it expires, or a subscription account, by clicking on the trash icon at the end of the row.



- Enter your Partner's dashboard, and view their list of accounts.
 - From this screen, it is possible to filter by Account Status, Backup Status, or Billing Status.
 - You can also search by account name or email.



Dashboard
Dashboard > PartnerDashboard > Alex Douglas1

38 of 59 Total Accounts

Search by account name or email

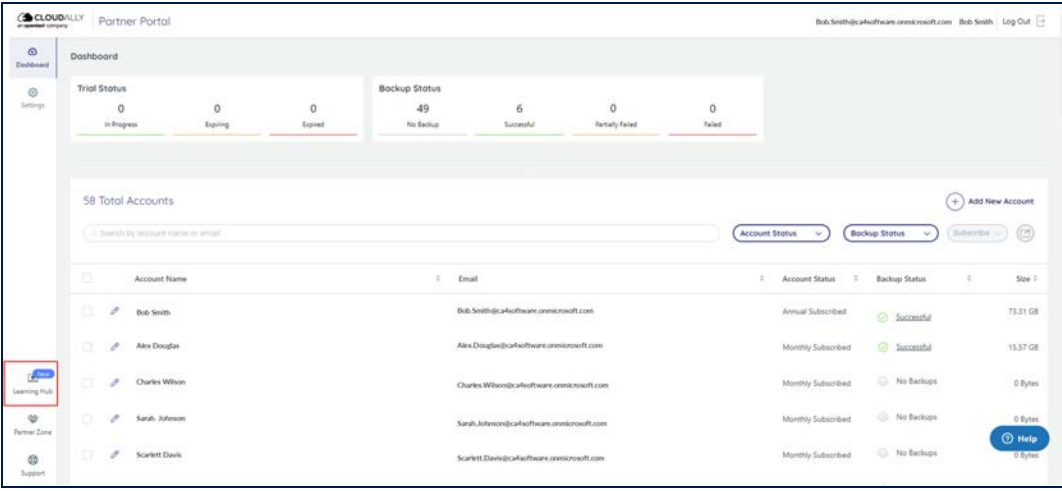
Account Status (1) Backup Status Billing Status

Monthly Subscribed Clear Filters

Account Name	Email	Account Status	Backup Status	Billing Status	Size	Entities	Amount
Bob Smith	bob.smith@ca4software....com	Monthly Subscribed	Successful	Overdue	15.63 GB	463	\$176.40
Alex Douglas	alex.douglas@ca4software....com	Monthly Subscribed	No Backups	None	0 Bytes	0	\$0.00
Rosy White	rosy.white@ca4software....com	Monthly Subscribed	No Backups	None	0 Bytes	0	\$0.00
Charles Parker	charles.parker@ca4software....com	Monthly Subscribed	No Backups	None	0 Bytes	0	\$0.00

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.



Dashboard

Trial Status: 0 In Progress, 0 Ending, 0 Expired

Backup Status: 49 No Backup, 6 Successful, 0 Partially Failed, 0 Failed

58 Total Accounts

Search by account name or email

Account Status Backup Status Subscribe

Account Name Email Account Status Backup Status Size

Bob Smith	Bob.Smith@ca4software.onmicrosoft.com	Annual Subscribed	Successful	73.31 GB
Alex Douglas	Alex.Douglas@ca4software.onmicrosoft.com	Monthly Subscribed	Successful	15.57 GB
Charles Wilson	Charles.Wilson@ca4software.onmicrosoft.com	Monthly Subscribed	No Backups	0 Bytes
Sarah Johnson	Sarah.Johnson@ca4software.onmicrosoft.com	Monthly Subscribed	No Backups	0 Bytes
Scarlett Davis	Scarlett.Davis@ca4software.onmicrosoft.com	Monthly Subscribed	No Backups	0 Bytes

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

The screenshot shows the CloudAlly Learning Hub dashboard. At the top, the header includes the CloudAlly logo, 'LEARNING HUB', and user information 'learner learner | Learner' with a 'Messages' link and a search bar. The main section is titled 'Home' and features a 'Progress' card with the text 'Find out how you are doing with your training'. Below this is a search bar 'Search my courses' and a row of five statistics: '16 courses in progress', '0 courses not passed', '3 completed courses', '9h 45m training time', and '0 certifications'. A 'Partner Portal' section follows, containing a sub-section '1. Getting to Know the Partner Portal'. This section displays two video thumbnails: 'CloudAlly Partner Portal Overview' and 'Client Application Intro'. Both videos show a progress bar at 0%.

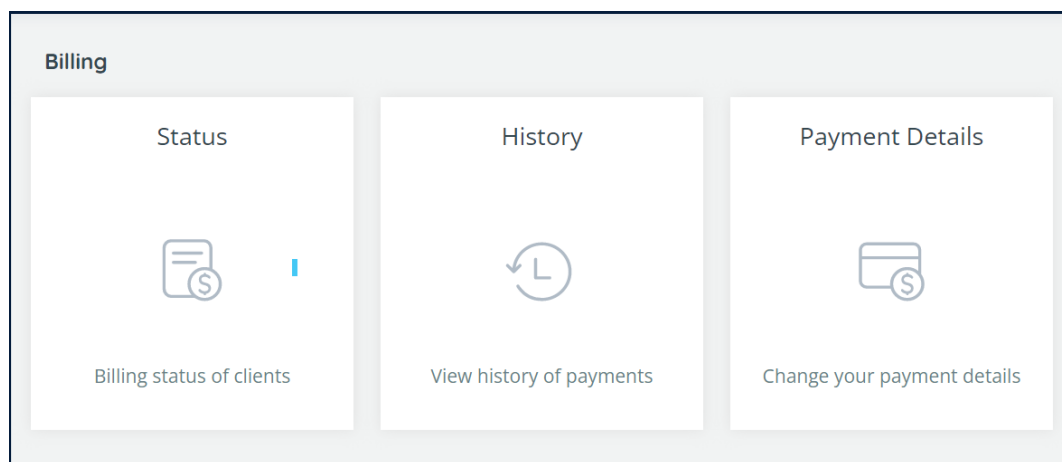
Scroll through the videos, select one that meets your needs, and click play .



4 Billing

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

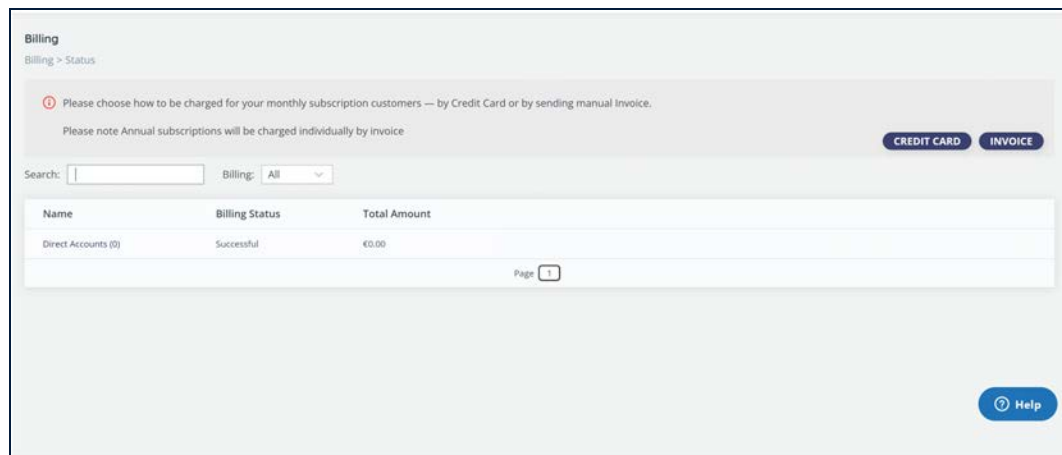
- Status
- History, and
- Payment Details



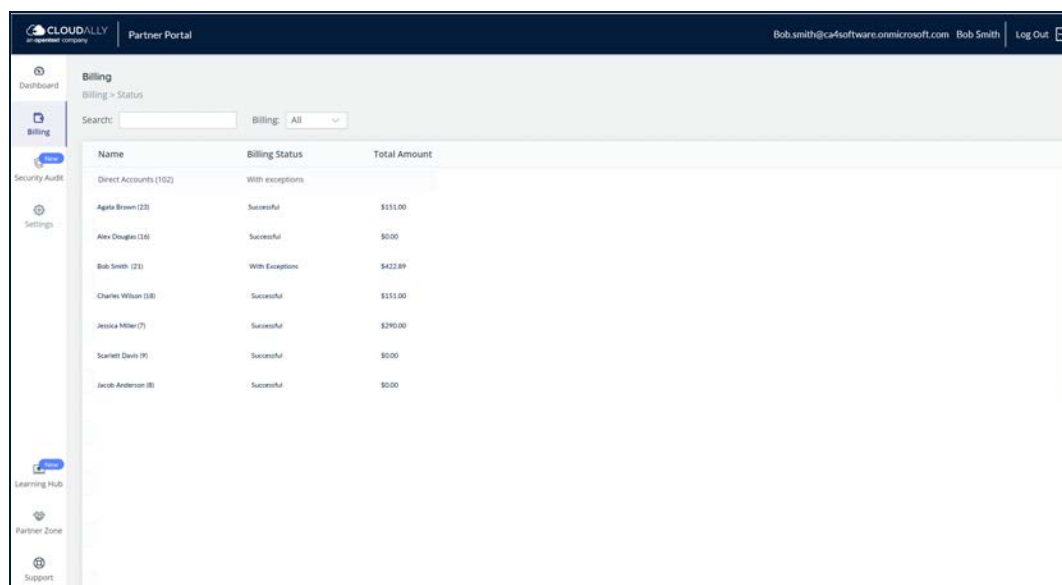
4.1 Status

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.



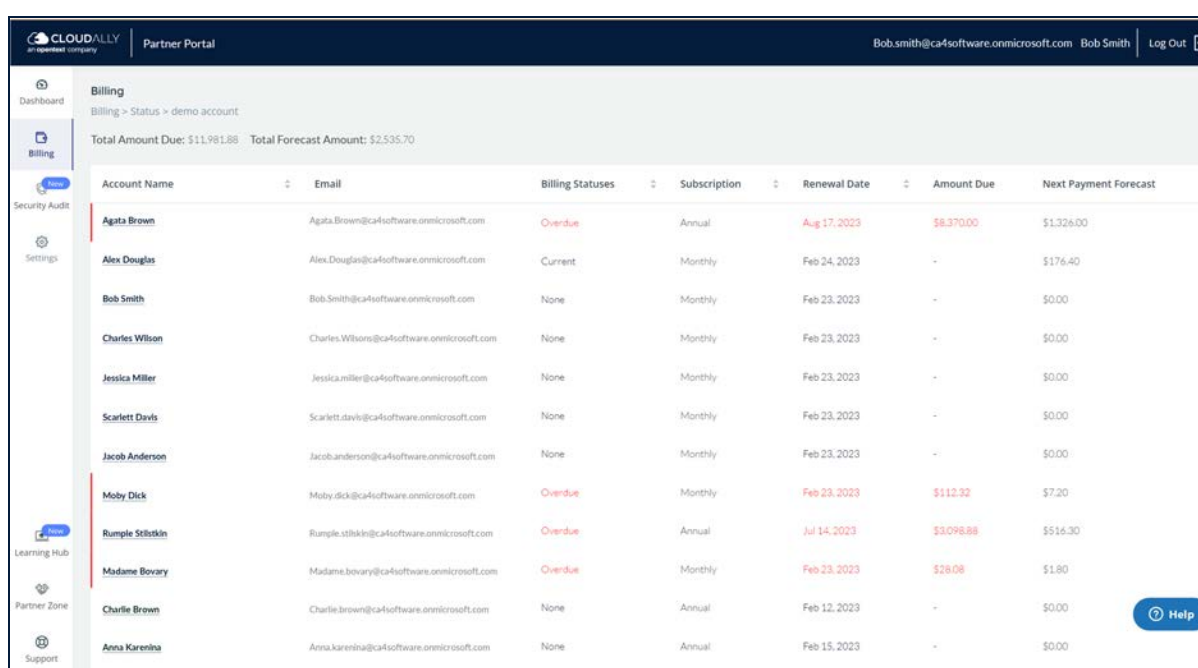
The **Billing Status** column gives a quick summary of the billing status of each of the customers' accounts.

- **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 screenshot shows the 'Billing' section of the CloudDally Partner Portal. At the top, it displays 'Total Amount Due: \$11,981.88' and 'Total Forecast Amount: \$2,535.70'. Below this is a table with the following columns: Account Name, Email, Billing Statuses, Subscription, Renewal Date, Amount Due, and Next Payment Forecast. The table lists 12 accounts, including Agata Brown (Overdue), Alex Douglas (Current), Bob Smith (None), Charles Wilson (None), Jessica Miller (None), Scarlett Davis (None), Jacob Anderson (None), Moby Dick (Overdue), Rumpel Stiltkin (Overdue), Madame Bovary (Overdue), Charlie Brown (None), and Anna Karenina (None). A 'Help' button is visible in the bottom right corner of the table area.

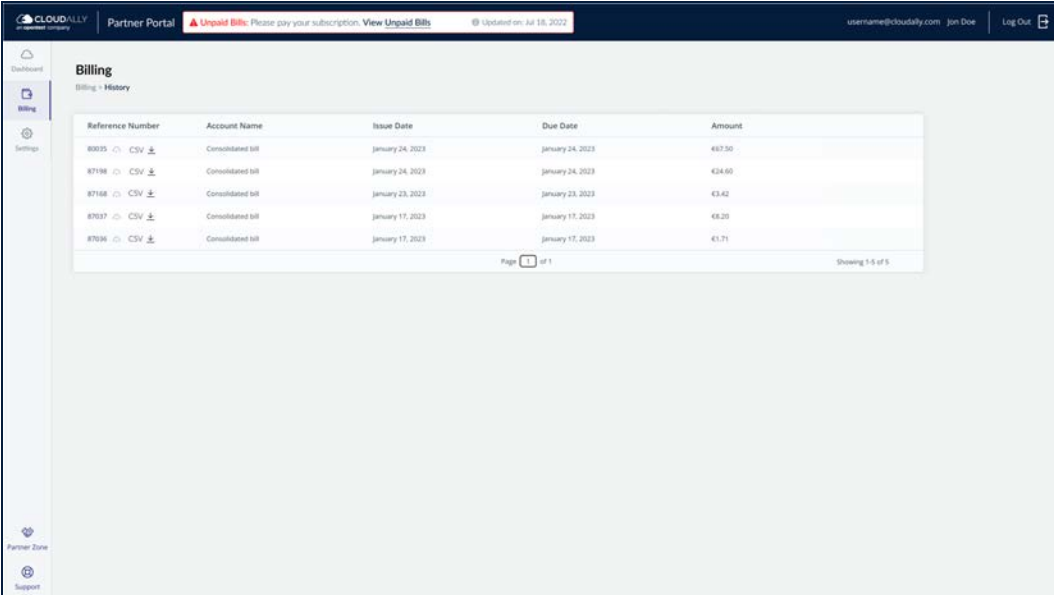
Account Name	Email	Billing Statuses	Subscription	Renewal Date	Amount Due	Next Payment Forecast
Agata Brown	Agata.Brown@ca4software.onmicrosoft.com	Overdue	Annual	Aug 17, 2023	\$8,370.00	\$1,326.00
Alex Douglas	Alex.Douglas@ca4software.onmicrosoft.com	Current	Monthly	Feb 24, 2023	-	\$176.40
Bob Smith	Bob.Smith@ca4software.onmicrosoft.com	None	Monthly	Feb 23, 2023	-	\$0.00
Charles Wilson	Charles.Wilson@ca4software.onmicrosoft.com	None	Monthly	Feb 23, 2023	-	\$0.00
Jessica Miller	Jessica.miller@ca4software.onmicrosoft.com	None	Monthly	Feb 23, 2023	-	\$0.00
Scarlett Davis	Scarlett.davis@ca4software.onmicrosoft.com	None	Monthly	Feb 23, 2023	-	\$0.00
Jacob Anderson	Jacob.anderson@ca4software.onmicrosoft.com	None	Monthly	Feb 23, 2023	-	\$0.00
Moby Dick	Moby.dick@ca4software.onmicrosoft.com	Overdue	Monthly	Feb 23, 2023	\$112.32	\$7.20
Rumpel Stiltkin	Rumpel.stiltkin@ca4software.onmicrosoft.com	Overdue	Annual	Jul 14, 2023	\$3,098.88	\$516.30
Madame Bovary	Madame.bovary@ca4software.onmicrosoft.com	Overdue	Monthly	Feb 23, 2023	\$28.08	\$1.80
Charlie Brown	Charlie.brown@ca4software.onmicrosoft.com	None	Annual	Feb 12, 2023	-	\$0.00
Anna Karenina	Anna.karenina@ca4software.onmicrosoft.com	None	Annual	Feb 15, 2023	-	\$0.00

- 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.



Reference Number	Account Name	Issue Date	Due Date	Amount
80035 CSV	Consolidated bill	January 24, 2023	January 24, 2023	487.50
87198 CSV	Consolidated bill	January 24, 2023	January 24, 2023	424.60
87148 CSV	Consolidated bill	January 23, 2023	January 23, 2023	43.42
87037 CSV	Consolidated bill	January 17, 2023	January 17, 2023	48.20
87036 CSV	Consolidated bill	January 17, 2023	January 17, 2023	41.71

Page 1 of 1 Showing 1-5 of 5

4.3 Payment Details

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

Billing
Billing > Payment

- Credit Card Details

Card Number:

[ADD NEW CARD](#) [ACTIVATE CARD](#) [Delete Card](#)

- Billing Details

Currency:

* First Name:

* Billing Email:

* Company Name:

Address Line 2:

* Country:

* City:

* Phone number:

Payment Day:

Title:

* Last Name:

Company Tax ID:

* Address Line 1:

Address Line 3:

State:

* Zip Code/Postal Code:

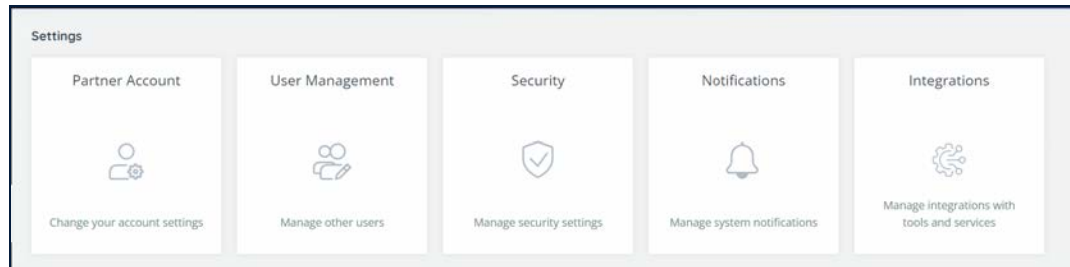
Email Invoice/Receipt: ☒ Link ☐ Attachment

[UPDATE BILLING DETAILS](#)

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

A screenshot of the 'Distributor Account Settings' page in the Distributor Portal. The page is titled 'Settings > Account' and contains several form fields for updating account information. The fields are: 'Account email' (bob.smith@ca4software.onmicrosoft.com), 'Archive location' (US East (Northern Virginia)), 'Partner ID' (DCEVR001), 'Account Name' (Bob Smith), 'Address' (123 Main Street, Anytown USA), and 'Phone number' (89321544). Below these fields is a section titled 'Default Subscription Settings for New Customer Accounts' with three radio button options: 'Trial with expiration', 'Trial with auto-subscription' (selected), and 'Auto-subscription without trial'. The 'Trial with auto-subscription' option has two sub-options: 'Monthly' (selected) and 'Annual'. At the bottom right of the page are 'Save' and 'Help' buttons. The page also features a sidebar with navigation links: Dashboard, Billing, Security Audit, Settings, Learning Hub, Partner Zone, and Support.

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 (Monthly or Annual billing)

The screenshot displays the 'Settings > Account' page in the CloudAlly Partner Portal. The page is divided into two main sections. The top section contains account details: 'Account email' (bob.smith@ca4software.onmicrosoft.com), 'Archive location' (US East (Northern Virginia)), 'Partner ID' (DOEVR001), 'Account Name' (Bob Smith), 'Address' (123 Main Street, Anytown USA), and 'Phone number' (89321544). The bottom section, titled 'Default Subscription Settings for New Customer Accounts', features three radio button options: 'Trial with expiration', 'Trial with auto-subscription' (which is selected), and 'Auto-subscription without trial'. Under the 'Trial with auto-subscription' option, there are two sub-options: 'Monthly' (selected) and 'Annual'. The page includes a 'Save' button and a 'Help' icon in the bottom right corner. The left sidebar shows navigation links for Dashboard, Billing, Security Audit, Settings, Learning Hub, Partner Zone, and Support.

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.

Settings

Settings >> User Management

The following external credentials are currently linked to your Partner Portal account

You can remove the credentials anytime if you prefer to use only your Partner Portal sign-in credentials

+

Add new user

Email	Type	2FA Authentication
Bob.smith@ca4software.onmicrosoft.com	Email	

Page 1 of 1

Showing 1-1 of 1

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.

Dashboard

Billing

Security Audit

Settings

Learning Hub

Partner Zone

Support

Settings

Settings > User Management > New

Email:

admin@company.com

Type:

Email

Password:

Role:

Administrator

Credentials

Partner Portal Operations

General

☒

 View Partner Portal settings page ⓘ

☒

 View billing page and manage payment details ⓘ

☒

 View billing notification messages ⓘ

☒

 View dashboard ⓘ

☒

 View security audit page

☒

 Add new Accounts

☒

 Subscribe Accounts

☒

 Manage Notifications

Account Operations

General

☒

 View Account setting page ⓘ

☒

 View billing page and manage payment details ⓘ

☒

 View support page ⓘ

Accessible Accounts

Search For

Status: All

Account Name	Status
<input checked="" type="checkbox"/> 14907.tst.user.ann	Active
<input checked="" type="checkbox"/> 14907.tst.user.ann2	Active
<input checked="" type="checkbox"/> 14907.tst.user.ann3(CustomerAWS)	Active
<input checked="" type="checkbox"/> 14907.tst.user.ann4.gcp	Active
<input checked="" type="checkbox"/> 14907.tst.user.mon	Active
<input checked="" type="checkbox"/> 14907.tst.user.mon2	Active

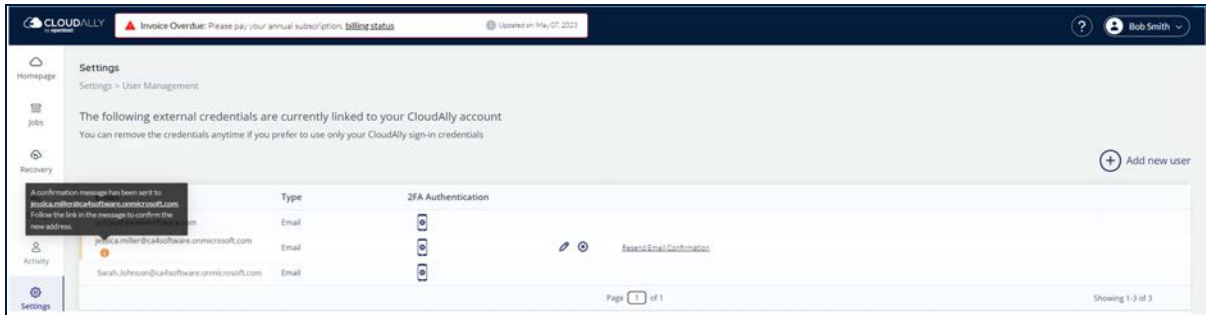
Help

Save

Cancel

To save changes, click **Save**.

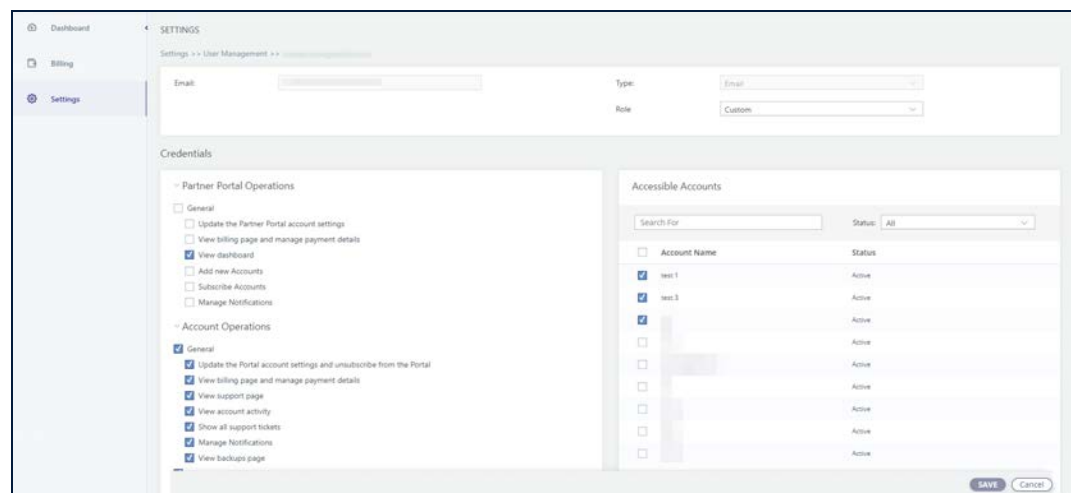
You will be returned to the *Settings* page. To complete the process, the user must confirm their email address using the link sent via email. This is a security measure, which ensures that the user's email address is valid.



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.

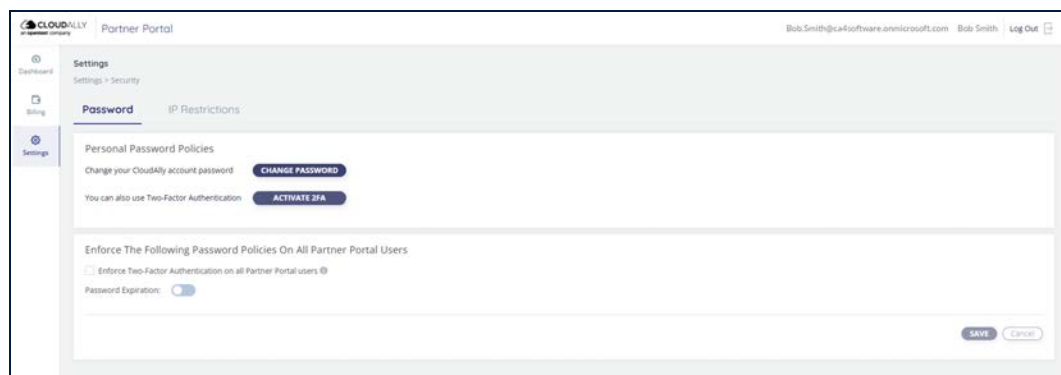


Note: Selecting the role “Administrator” enables all services and operations, but doesn’t affect the list of accessible user accounts.

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.

A modal dialog box titled 'Change password' with a close button (X) in the top right corner. It contains three input fields: 'Current Password:', 'New Password:', and 'Confirm New Password:'. At the bottom right, there are two buttons: 'SAVE' and 'Cancel'.

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.

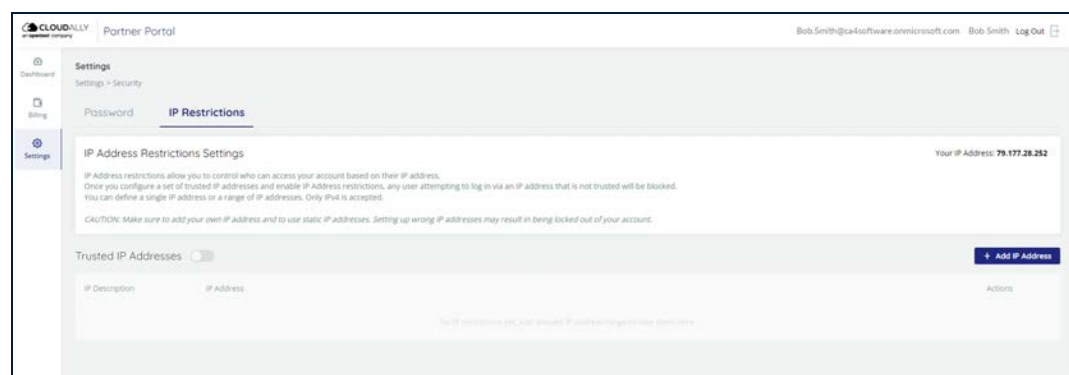
Setting Up IP Restrictions

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

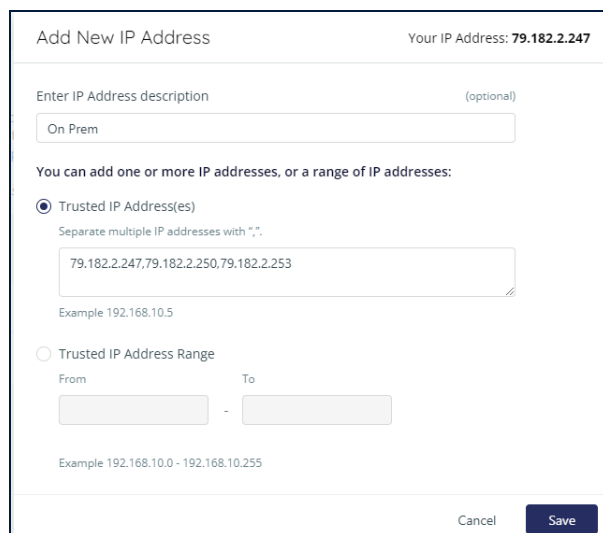
IMPORTANT!

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**.

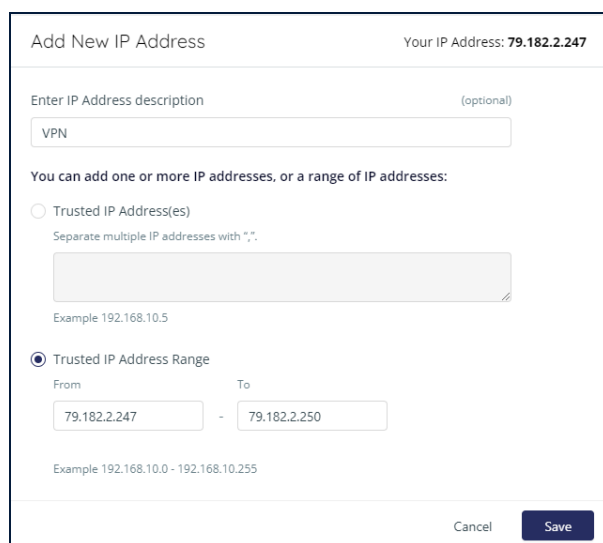


2. Click **+ Add IP Address**.
3. Enter one or more IP addresses:
 - a. Enter individual addresses separated by commas, and an optional description.



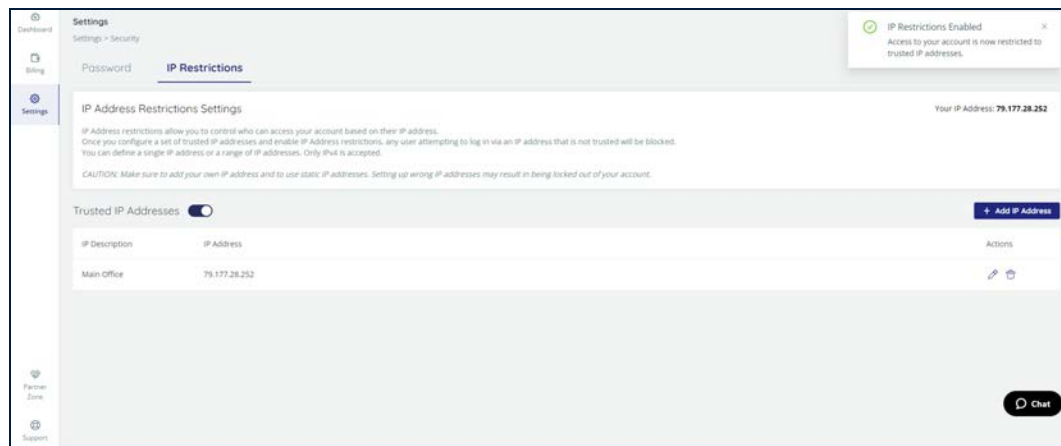
The screenshot shows the 'Add New IP Address' form. At the top right, it says 'Your IP Address: 79.182.2.247'. Below this is a text input field for 'Enter IP Address description (optional)' with the value 'On Prem'. Underneath, a message states 'You can add one or more IP addresses, or a range of IP addresses:'. There are two radio button options: 'Trusted IP Address(es)' (which is selected) and 'Trusted IP Address Range'. The 'Trusted IP Address(es)' option has a text input field containing '79.182.2.247,79.182.2.250,79.182.2.253' and an example '192.168.10.5'. The 'Trusted IP Address Range' option has 'From' and 'To' input fields with an example '192.168.10.0 - 192.168.10.255'. At the bottom right are 'Cancel' and 'Save' buttons.

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



The screenshot shows the 'Add New IP Address' form. At the top right, it says 'Your IP Address: 79.182.2.247'. Below this is a text input field for 'Enter IP Address description (optional)' with the value 'VPN'. Underneath, a message states 'You can add one or more IP addresses, or a range of IP addresses:'. There are two radio button options: 'Trusted IP Address(es)' and 'Trusted IP Address Range' (which is selected). The 'Trusted IP Address(es)' option has a text input field and an example '192.168.10.5'. The 'Trusted IP Address Range' option has 'From' and 'To' input fields containing '79.182.2.247' and '79.182.2.250' respectively, with an example '192.168.10.0 - 192.168.10.255'. At the bottom right are 'Cancel' and 'Save' buttons.

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

.....

[Forgot your password?](#)

Access Denied

Sign In

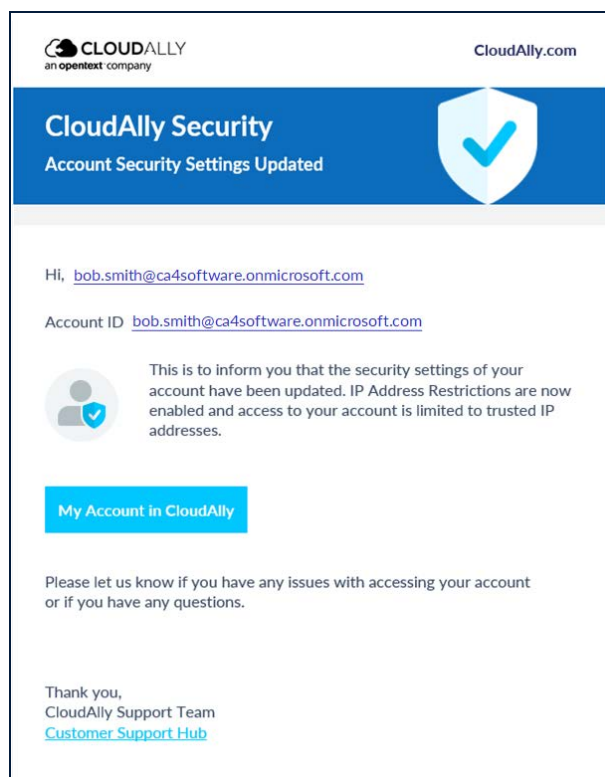
or

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

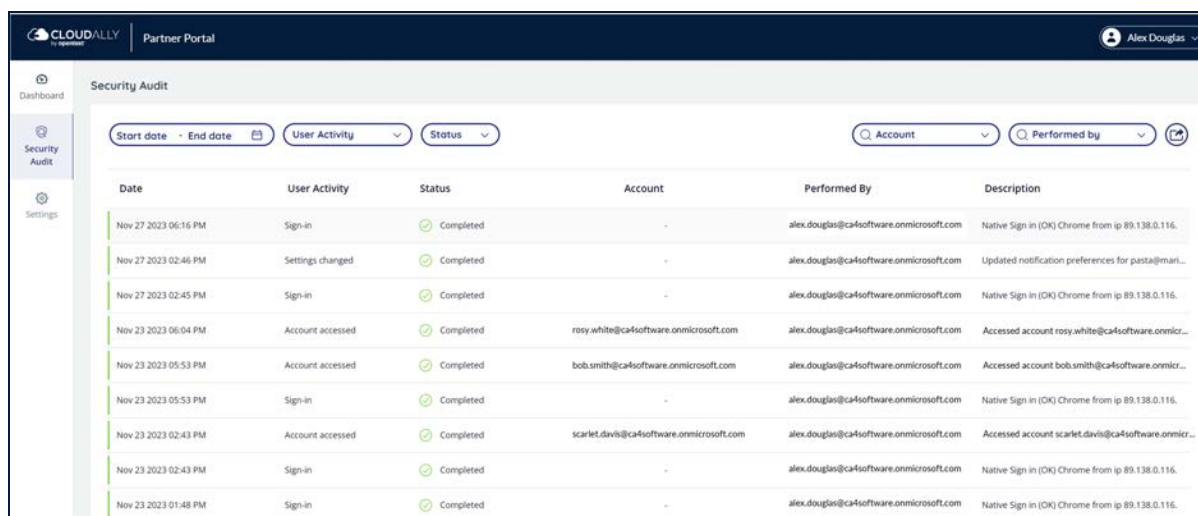
- Change billing details, such as credit card update
- Notification, such as export security audit

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.

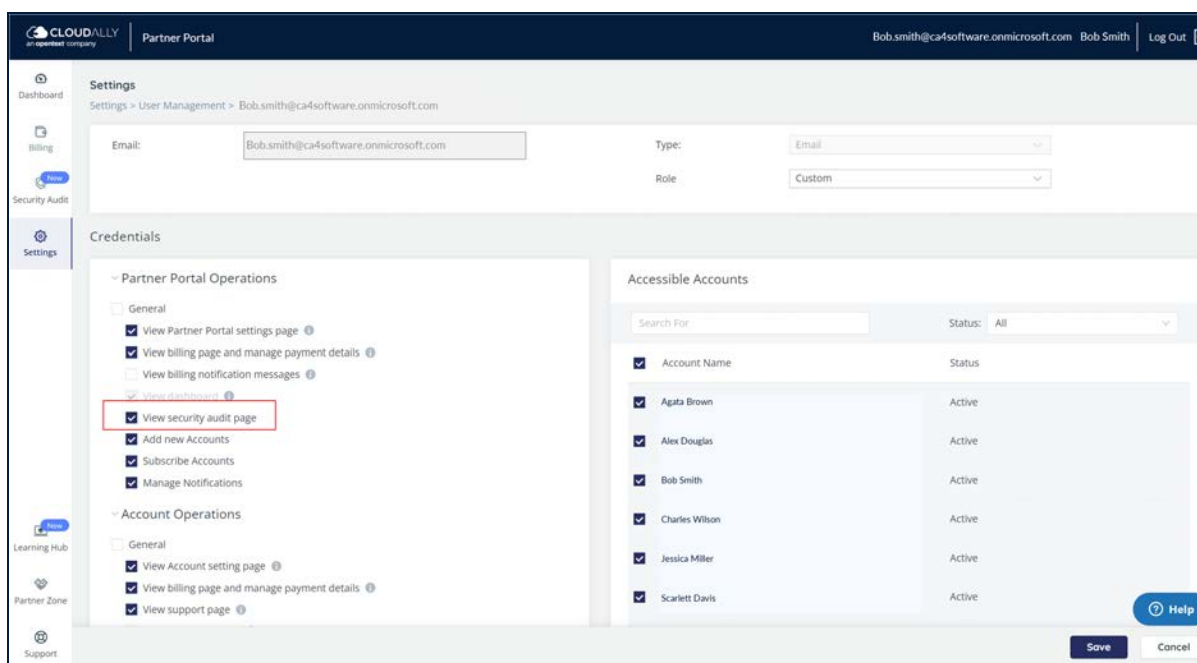
The Security audit table can be exported as a CSV file by clicking the **Export** icon. Any filters that are selected on the screen will also affect the exported file.



Date	User Activity	Status	Account	Performed By	Description
Nov 27 2023 06:16 PM	Sign-in	Completed	-	alex.douglas@ca4software.onmicrosoft.com	Native Sign in (OK) Chrome from ip 89.138.0.116.
Nov 27 2023 02:46 PM	Settings changed	Completed	-	alex.douglas@ca4software.onmicrosoft.com	Updated notification preferences for pasta@marl...
Nov 27 2023 02:45 PM	Sign-in	Completed	-	alex.douglas@ca4software.onmicrosoft.com	Native Sign in (OK) Chrome from ip 89.138.0.116.
Nov 23 2023 06:04 PM	Account accessed	Completed	rosy.white@ca4software.onmicrosoft.com	alex.douglas@ca4software.onmicrosoft.com	Accessed account rosy.white@ca4software.onmicr...
Nov 23 2023 05:53 PM	Account accessed	Completed	bob.smith@ca4software.onmicrosoft.com	alex.douglas@ca4software.onmicrosoft.com	Accessed account bob.smith@ca4software.onmicr...
Nov 23 2023 05:53 PM	Sign-in	Completed	-	alex.douglas@ca4software.onmicrosoft.com	Native Sign in (OK) Chrome from ip 89.138.0.116.
Nov 23 2023 02:43 PM	Account accessed	Completed	scarlet.davis@ca4software.onmicrosoft.com	alex.douglas@ca4software.onmicrosoft.com	Accessed account scarlet.davis@ca4software.onmicr...
Nov 23 2023 02:43 PM	Sign-in	Completed	-	alex.douglas@ca4software.onmicrosoft.com	Native Sign in (OK) Chrome from ip 89.138.0.116.
Nov 23 2023 01:48 PM	Sign-in	Completed	-	alex.douglas@ca4software.onmicrosoft.com	Native Sign in (OK) Chrome from ip 89.138.0.116.

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 Backup Summary Report notification, such as:

- Whether the CSV backup report is included as an attachment or provided via a link in the email
- The format of the reports - consolidated into a single file (default for new Partners) or individual files per customer.

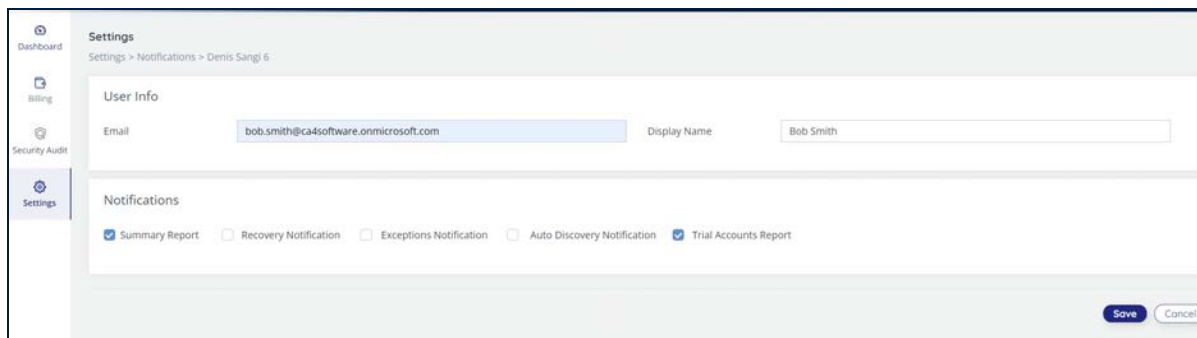
Note: Existing Partners who already receive individual files per customer will continue to do so. Partners may change this option on the **Settings > Notifications** page.

- The frequency of the reports (daily, weekly or monthly)
- Whether to receive the full report, or only receive it in case of backup failure.

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 - This notification is sent both when there are backup errors and integration errors. (For integration information, see "Integrations" below.)
 - 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.

5.6 Integrations

The Integrations page displays all of the available integrations to external services and systems, with an option to connect either as a self-service, or by calling Support and providing additional details. The page also includes details about the REST API integration with an option to generate API tokens.

The following types of integrations may be configured on this screen:

- SIEM (Security Information and Event Management)
- RMM (Remote Monitoring and Management /PSA (Professional Services Automation)
- API - enables integrating with the CloudAlly REST API.

5.6.1 SIEM: Splunk

CloudAlly enables you to integrate with SIEM systems in order to help you increase operational efficiency by unifying threat detection, investigation and response workflows.

5.6.1.1 Splunk

The first available CloudAlly SIEM integration is with Splunk, using the Splunk HTTP Event Collector (HEC).

Versions Supported:

5.6.1.2 Which Events are Sent to Splunk?

You can choose to send one or more of the following to Splunk:

Note: CloudAlly sends events to Splunk periodically, approximately every 10 minutes.

- Customers' activity events, such as backups and restores
- Customers' Security Audit logs (see "Security Audit" on page 23)
- Partner Portal events from the Partner Portal Security Audit.

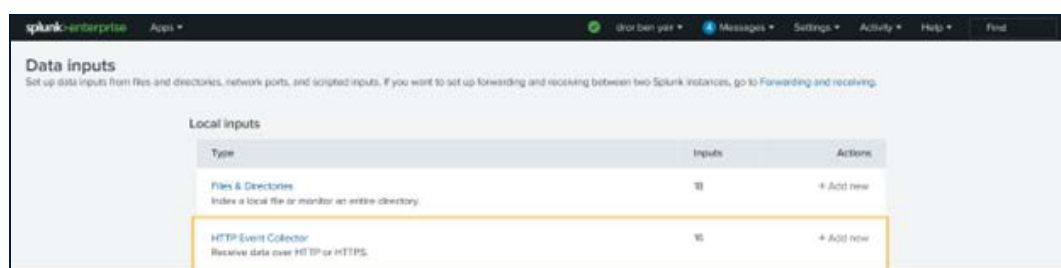
Note: You can send events collected from your direct customers, and your Partner Portal account. Events from your Resellers and their customers are not supported.

5.6.1.3 Pre-requisite: Setting Up Your Splunk Account

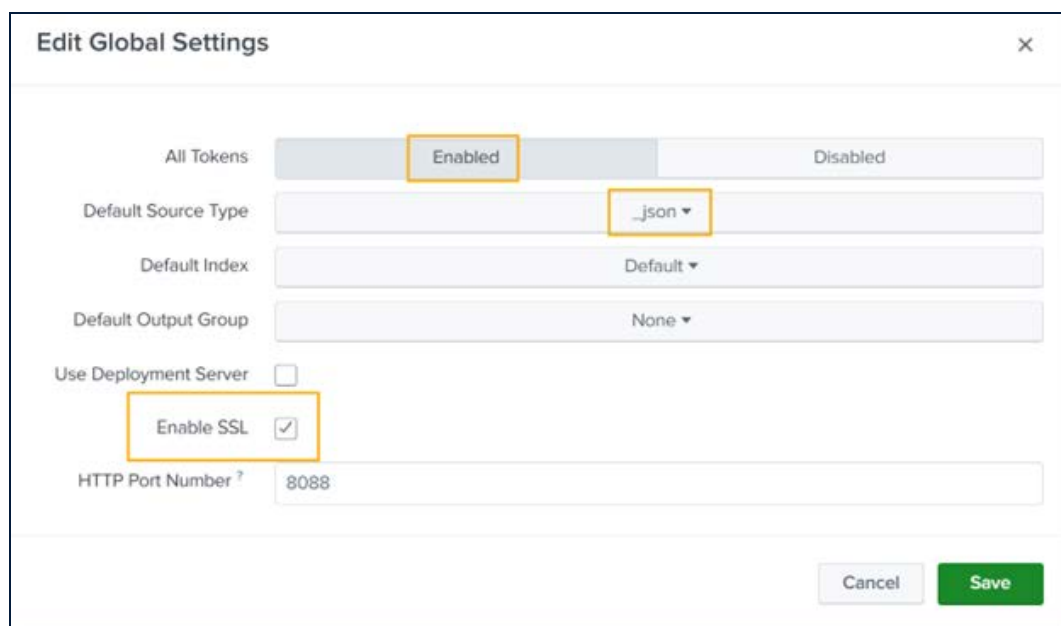
Before you can connect your CloudAlly Partner account to Splunk, you first need to establish an account with Splunk and configure the Splunk HTTP event collector.

Perform the following steps in the Splunk Admin Console.

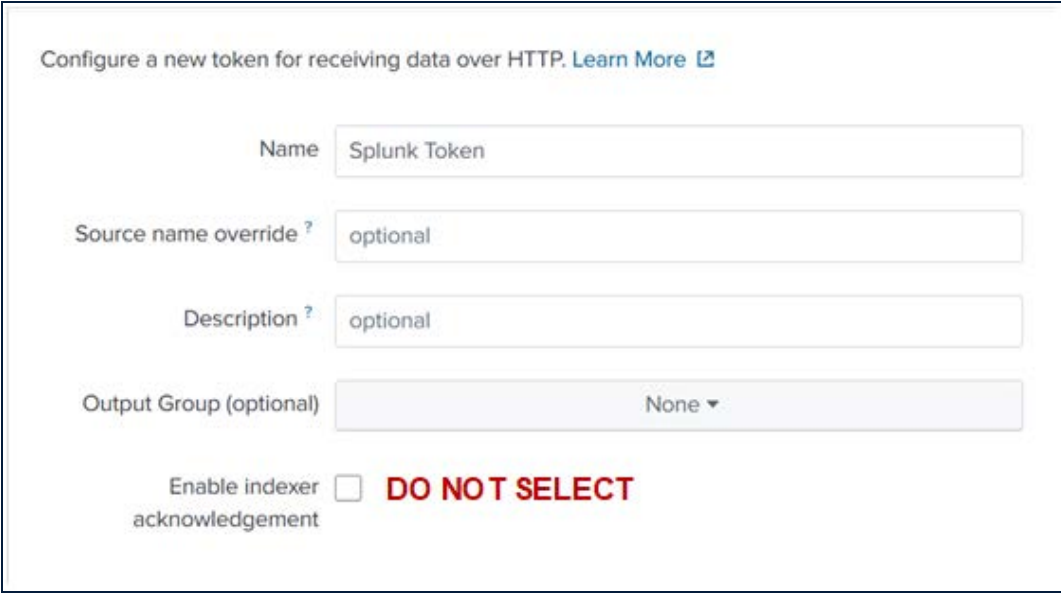
1. Navigate to **Settings>Data Inputs>HTTP Event Collector**.



2. Under the **Global Settings** option:
 - a. Enable the HTTP Event Collector by setting All Tokens to **Enabled**.
 - b. Choose **json** as default source type.
 - c. Check **Enable SSL**.



3. Under the **New Token** option, create a new token and copy the value - it will be used in the Partner Portal.



The screenshot shows a form titled "Configure a new token for receiving data over HTTP. [Learn More](#)". The form contains the following fields:

- Name:** A text input field containing "Splunk Token".
- Source name override ?** A text input field containing "optional".
- Description ?** A text input field containing "optional".
- Output Group (optional):** A dropdown menu currently showing "None".
- Enable indexer acknowledgement:** A checkbox that is unchecked, followed by the text **DO NOT SELECT** in red.

IMPORTANT NOTE: Do NOT check "Enable indexer Acknowledgment."

Note: A separate SIEM integration can be configured directly in the customer account in a similar way, sending customer account events to Splunk. If needed, the Partner can configure the SIEM integration on behalf of his customer.

4. **Find Your HEC URL.:** The standard form for the HEC URL varies, depending on the Splunk software type you have. Find the standard form on this page: [Set up and use HTTP Event Collector in Splunk Web](#).
5. Verify that you have set up an **SSL certificate** issued by a commonly accepted certificate authority (CA) on the Splunk HEC endpoint.

5.6.1.4 Setting Up Splunk in the Partner Portal

1. From the Partner Portal navigation pane, click **Settings > SIEM**.
2. Click **Splunk > Connect**. Complete the fields on the following screen:

Splunk SIEM Integration

[? Splunk HEC Setup](#)

Splunk HTTP Event Collector URL(HEC)*

Please verify [Splunk SSL Certificate](#). ⓘ

Splunk Token*

Event Source (Optional)

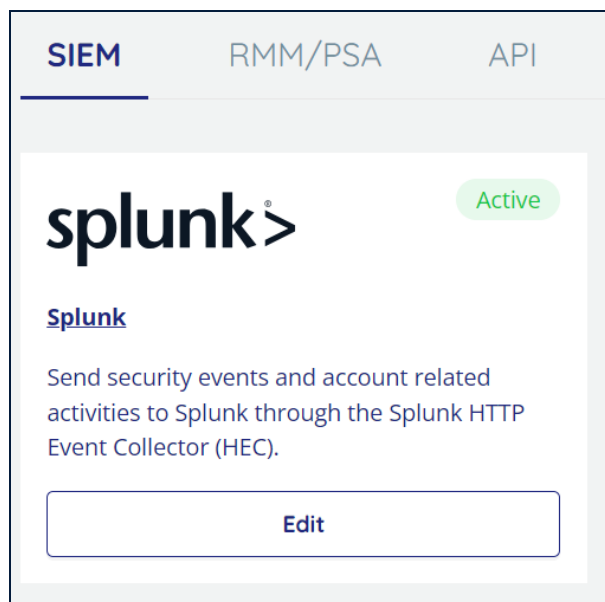
☒ Send Activity Events

☒ Send Audit Log

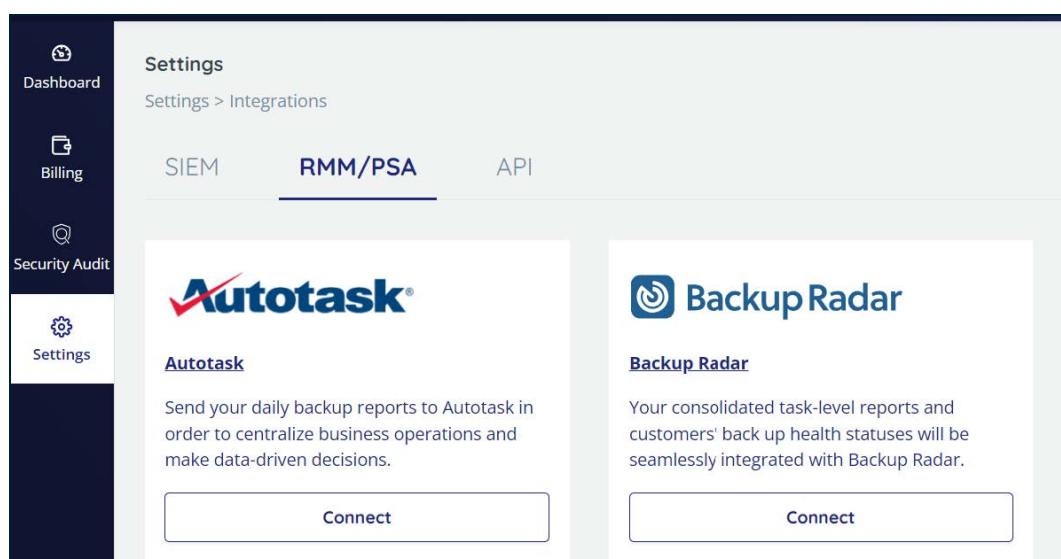
☒ Include Partner Account Events

Cancel **Save**

- a. Enter the **Splunk HTTP Event Collector URL**.
 - b. Paste the token value that you copied into the Splunk Token field.
 - c. Optional: Add the **Event Source**, which is the override value to assign to the event data.
3. By default, there are 3 options at the bottom that are selected. You can de-select any that are not relevant for you:
- a. Send customer activity events
 - b. Send customer audit log
 - c. Include your Partner account events
4. Click **Save**. The Splunk tile will now be Active.
5. To delete the integration, click **Edit > Delete**.



5.6.2 RMM/PSA: Autotask and Backup Radar



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

To enable this feature, subscribe to either Autotask or Backup Radar, and then contact CloudAlly Support.

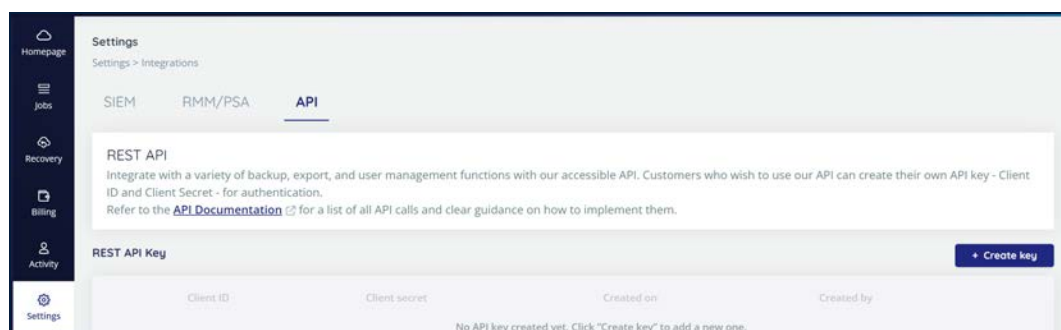
5.6.3 API

The third option on the Integrations page enables you to connect to the CloudAlly API.

CloudAlly has a robust API, that enables you to perform billing management, backup, restore, and download management, Partner Portal management, and user management functions. It enables you to automate processes and integrate with the CloudAlly solution. The API can be used for many common business scenarios, such as exporting the data of customers who leave your company as part of the off-boarding process.

The REST API screen will be blank if you have never created an API key. If you have created one in the past, you will see it on the screen.

Note: The Created On Date is not available for client IDs created prior to CloudAlly release 24.4.1.



5.6.3.1 Creating a Key

The first step towards integrating with our API is generating your own Client ID and Client Secret for authentication. Click **+Create key**.

The Client ID and Client Secret will be generated, so that you can copy them for use in the headers of your API calls.

Client ID and Secret

⚠

Ensure that you copy the "Client Secret" before you click on **Close**.
If you do not copy it, you will not be able to see it again and will have to create a new one.

Client ID

12345-67890-abcde-fghij

📋

Client Secret

👁 📋

Close

IMPORTANT! Ensure that you copy the "Client Secret" before you click Close. If you do not copy it, you will not be able to see it again and will have to create a new one.

If you need to delete your API key, click the trash icon.

Settings

Settings > Integrations

SIEMRMM/PSAAPI

REST API

Integrate with a variety of backup, export, and user management functions with our accessible API. Customers who wish to use our API can create their own API key - Client ID and Client Secret - for authentication.
Refer to the [API Documentation](#) for a list of all API calls and clear guidance on how to implement them.

REST API Key

+ Create key

	<div>Client ID</div> 12345-67890-abcde-fghij	<div>Client secret</div> *****	<div>Created on</div> Sep 24 2024, 03:10 PM	<div>Created by</div> bob.smith@ca4software.com	
--	--	--------------------------------	---	---	--

5.6.3.2 Next Steps

Once you have generated an API key, the next step is to call the Authentication API using the Client ID and the Client Secret.

For each user, you need to create a unique access token and refresh token.

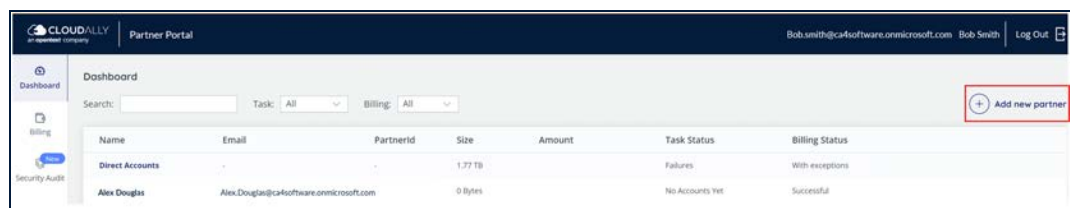
The complete list of CloudAlly API calls can be found [here](#).

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. These 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

Add New Partner

Partner settings

* Partner name:

* Partner email:

Contact person name:

* Country:

Storage Settings

Data Center Location:

US East (Northern Virginia) ▾

Cancel

OK

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..**

Dashboard

Search:

Task: All ▾

Billing: All ▾

+ Add new partner

Name	Email	Partnerid	Size	Amount	Task Status	Billing Status
Direct Accounts	-	-	68.72 GB		Successful	Successful

Page 1 of 1

Showing 1-1 of 1

22 Total Accounts

+ Add New Account

Search by account name or email

Account Status ▾

Backup Status ▾

Billing Status ▾

Subscribe ▾

6.4 Activating Backups for New Customer 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.

Note: You have the option of turning on high-frequency backups for any of your customers' tasks, on the *Backup Settings* page > **Backup Frequency** drop-down menu. To enable this option for a customer, contact your Partner Account Manager or CloudAlly Support.

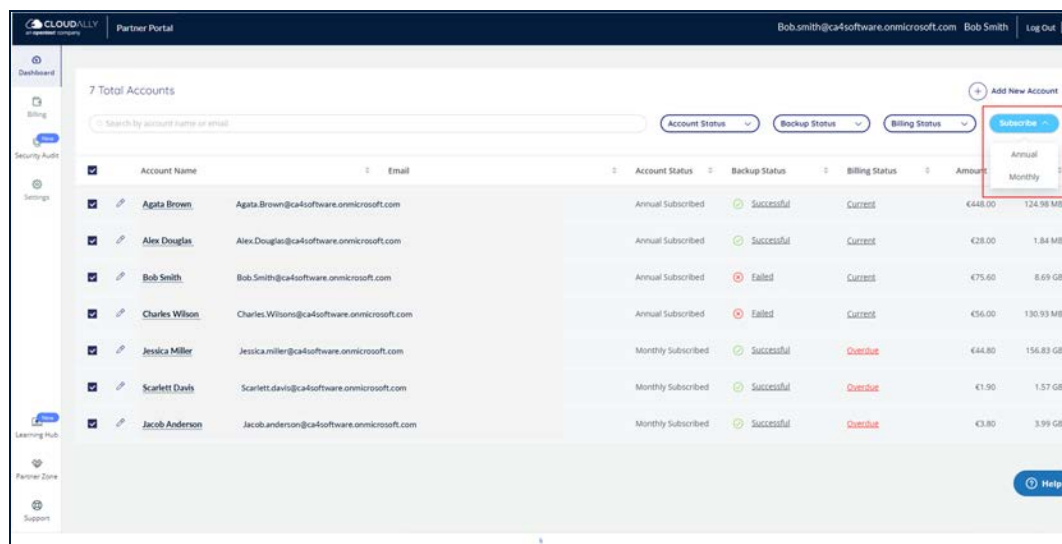
6.5 Subscribing a Trial Account

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**:



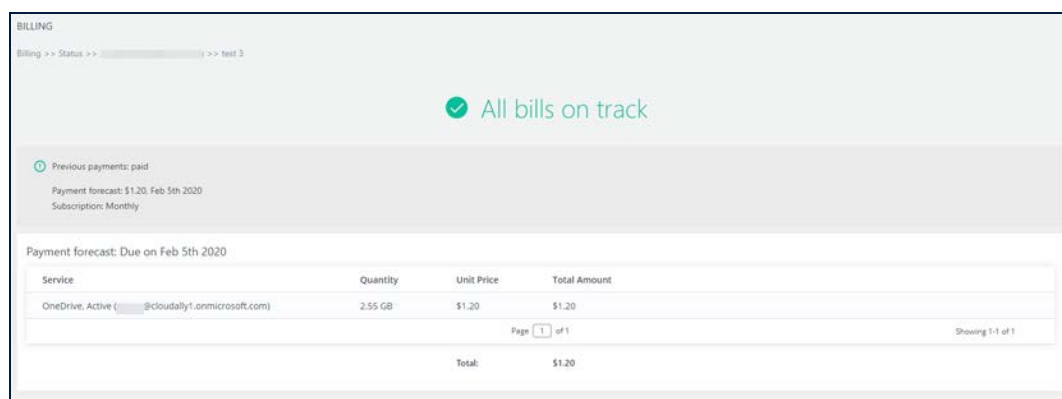
Only the trial accounts will be affected by this action. The accounts that are already subscribed with another type of subscription remain as they are.

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.

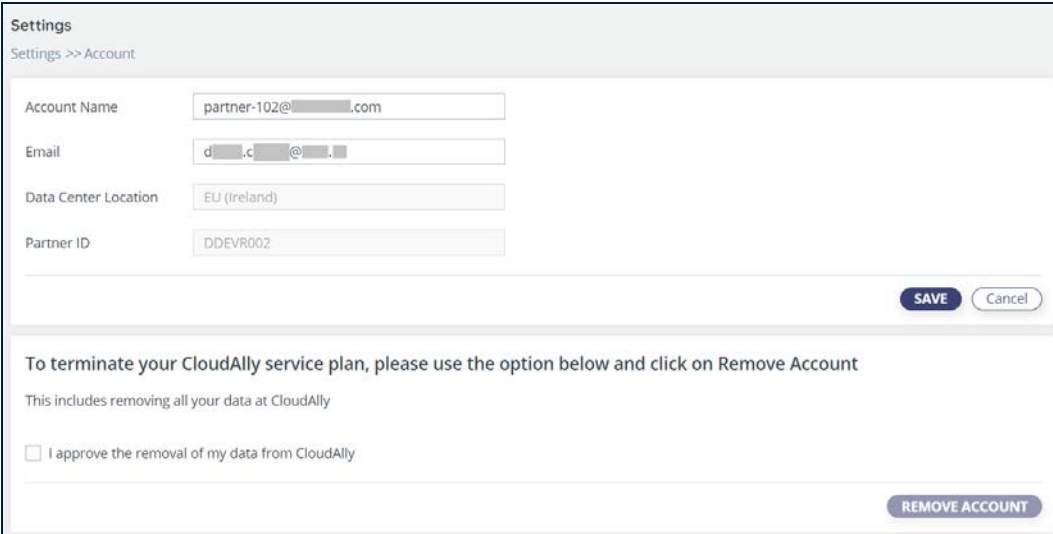
Click the account name to drill down to the account level for a detailed view of the billing information.



6.6.1 Canceling a User's Subscription

To cancel a user's subscription, drill down into the customer's account from the Dashboard.

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



The screenshot shows the 'Settings > Account' page. It contains a form with the following fields: 'Account Name' (partner-102@...com), 'Email' (d...c...@...), 'Data Center Location' (EU (Ireland)), and 'Partner ID' (DDEV002). There are 'SAVE' and 'Cancel' buttons. Below the form, a message states: 'To terminate your CloudAlly service plan, please use the option below and click on Remove Account. This includes removing all your data at CloudAlly.' There is a checkbox labeled 'I approve the removal of my data from CloudAlly' which is currently unchecked. A 'REMOVE ACCOUNT' button is at the bottom right.

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

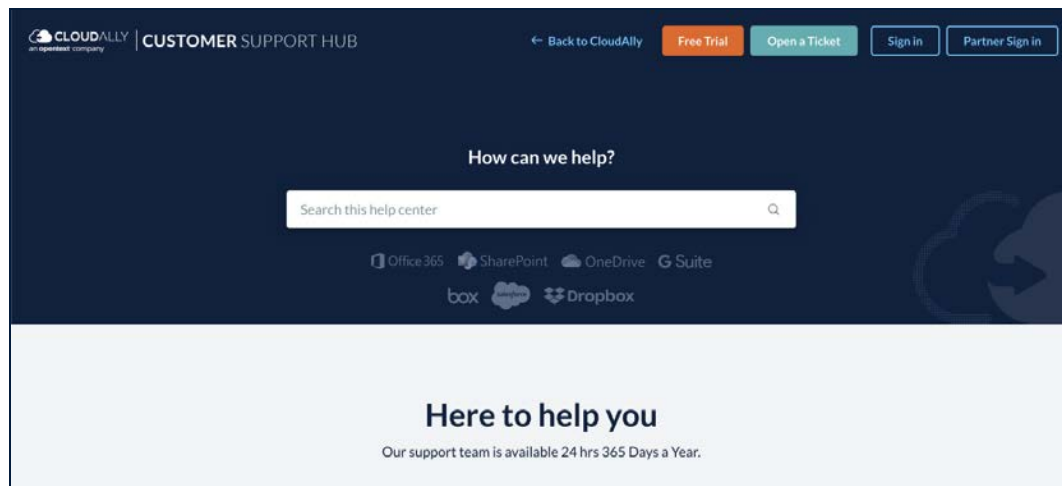
CloudAlly takes privacy seriously. Read our Privacy Policy at <https://www.cloudally.com/privacy-policy>

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

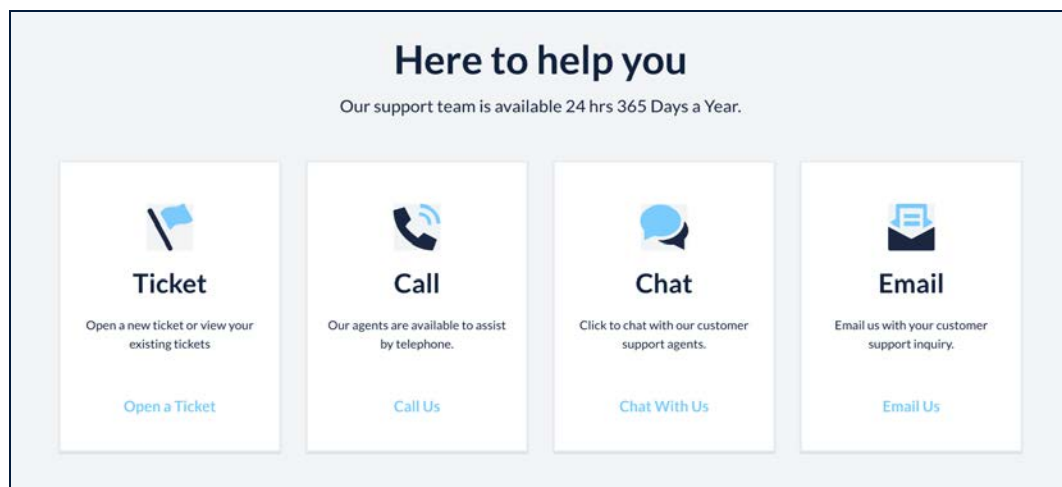
Email Addresses:

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.

