cloudally
NEVER FACE DATA LOSS

## 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 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:

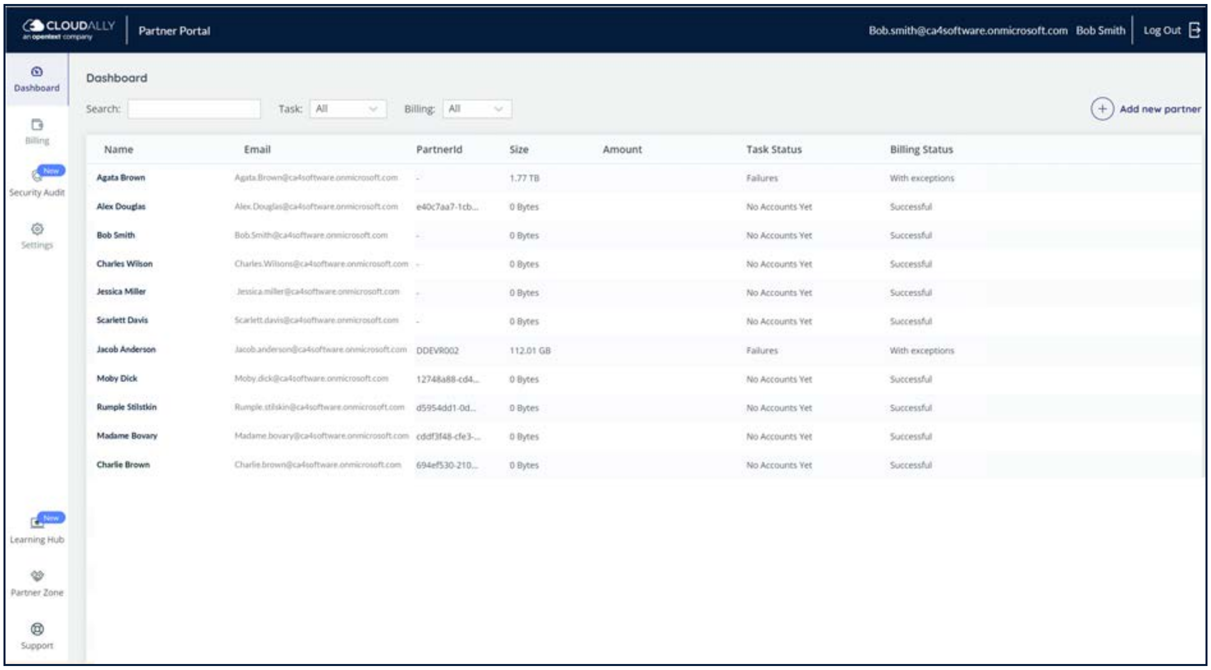
- Dashboard
- Billing
- Settings
- Learning Hub
- Partner Zone
- Support

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:

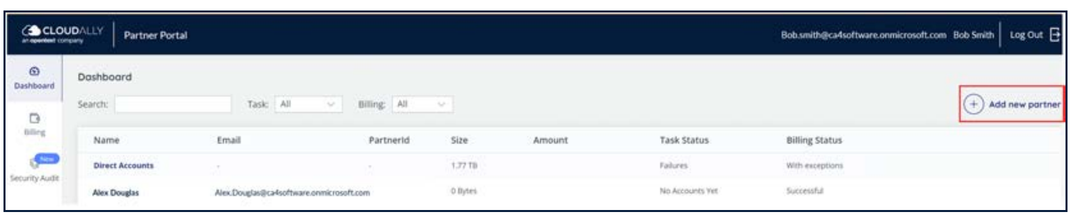
- **Name**: the name you provided when you created a new customer's account.
- **Email**: the email of the customer.
- **Partner ID**: Unique ID of each partner
- **Size**: the total size of all backups in the customer's account.
- **Amount**: the amount paid or the amount owed.
- **Task Status**: a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



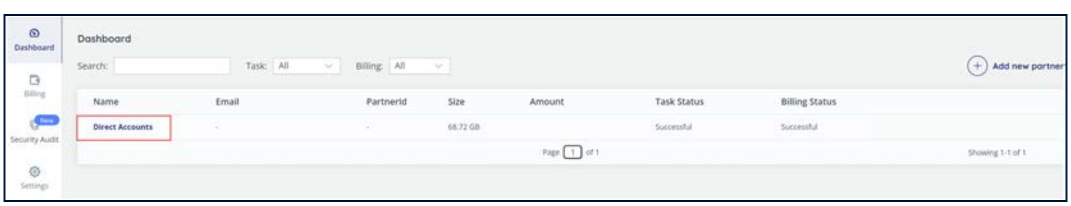

### 3.1.1 Features

The Distributor Portal dashboard enables you to:

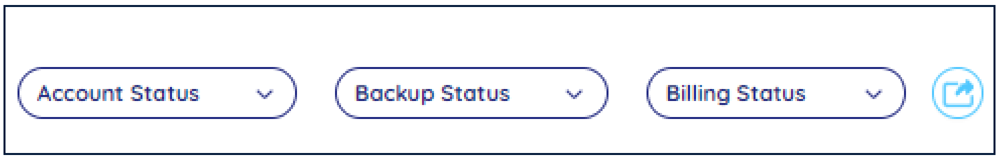
- Set up a new Partner (indirect reseller) by clicking **+Add New Partner**.




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

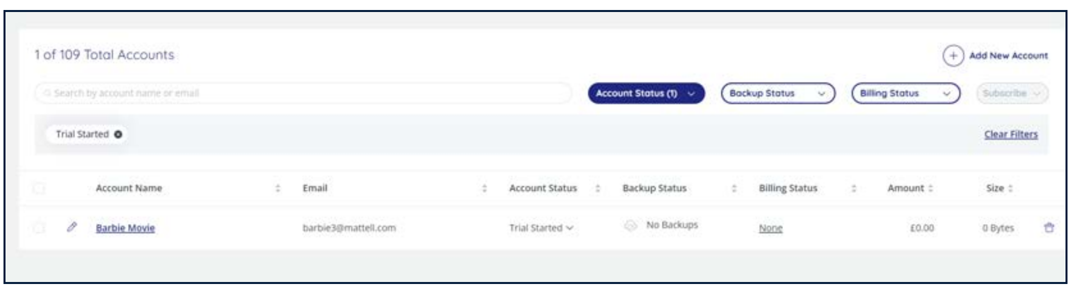



- Export a CSV file that lists all of your Partners' entities that were backed up, including the status of each entity (active, inactive, or archived). And for Microsoft Exchange mailboxes, the file will list whether each one is licensed or unlicensed.
  - To export a usage report, select one or more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

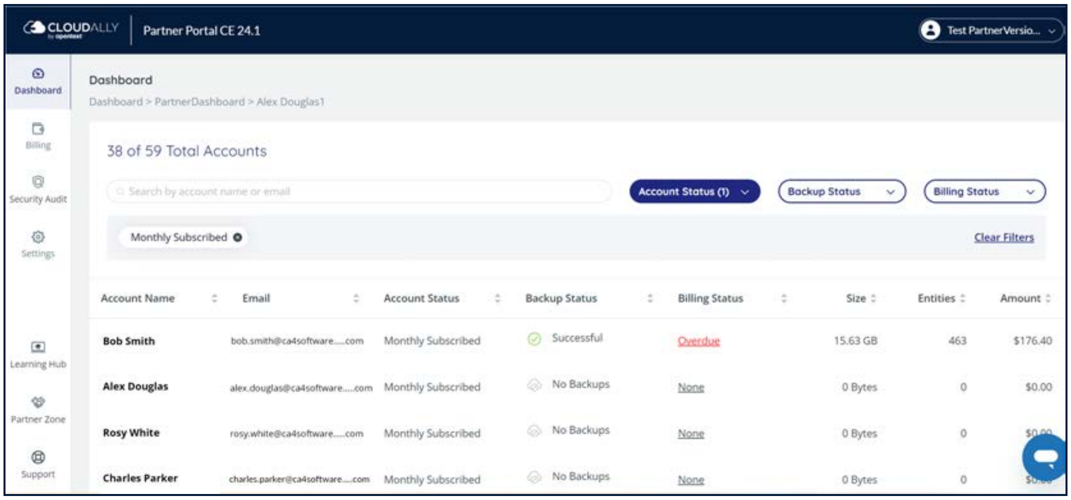



  - After you confirm the usage report, you will be sent an email with a zip file attachment containing the CSV file.

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

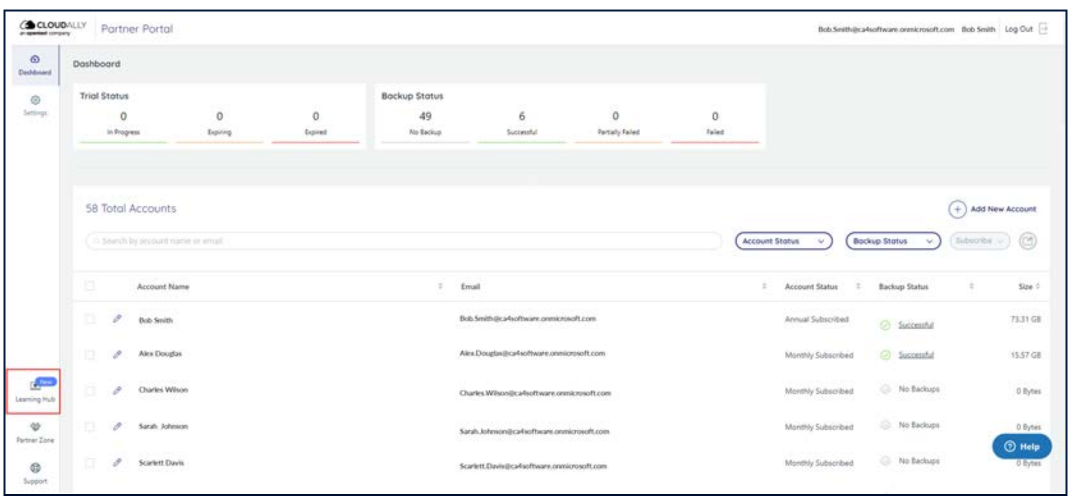



- Enter your Partner's dashboard, and view their list of accounts.
  - From this screen, it is possible to filter by Account Status, Backup Status, or Billing Status.
  - You can also search by account name or email.

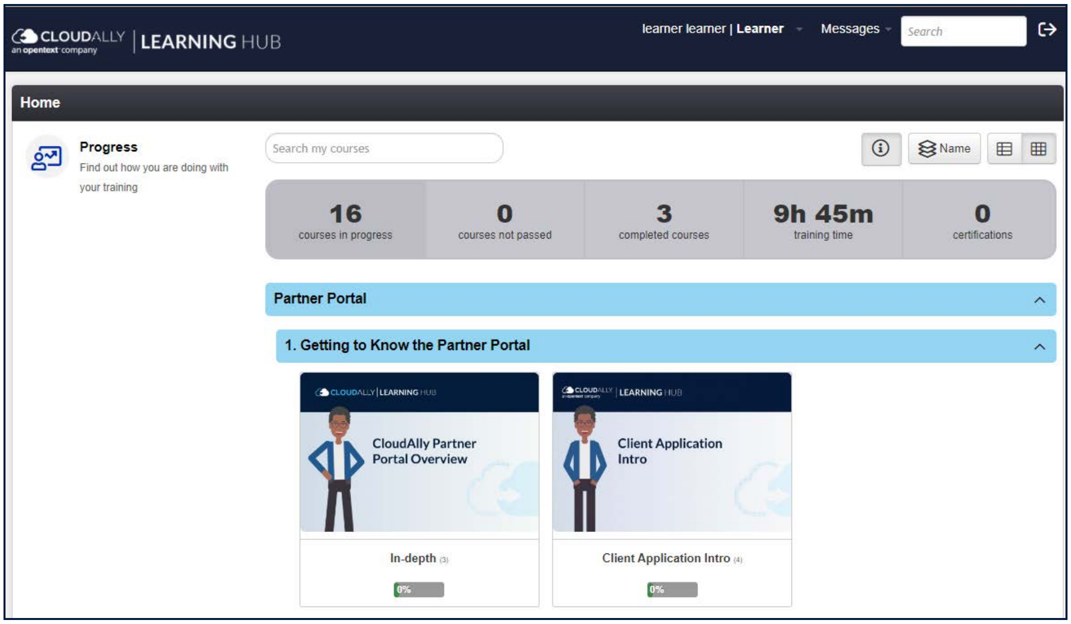



## 3.2 Learning Hub

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:

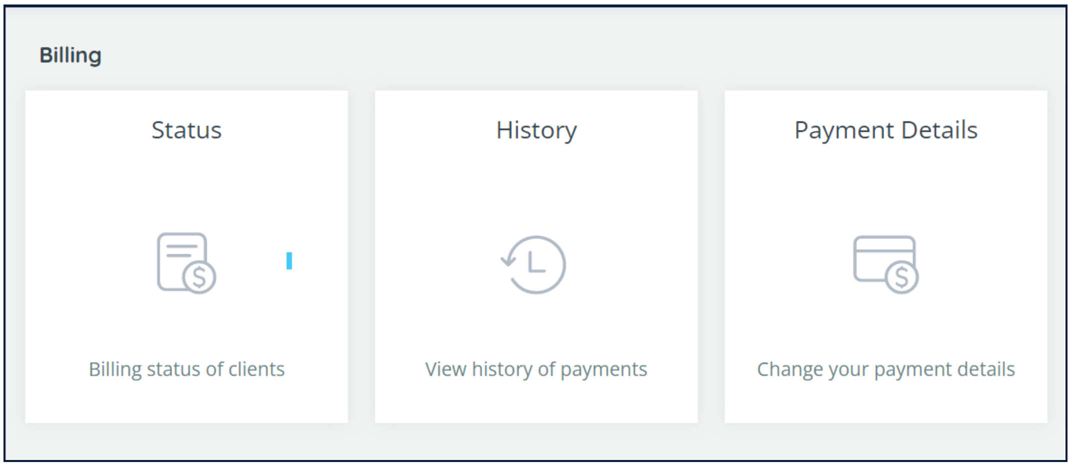



Scroll through the videos, select one that meets your needs, and click play .

# 4 Billing

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

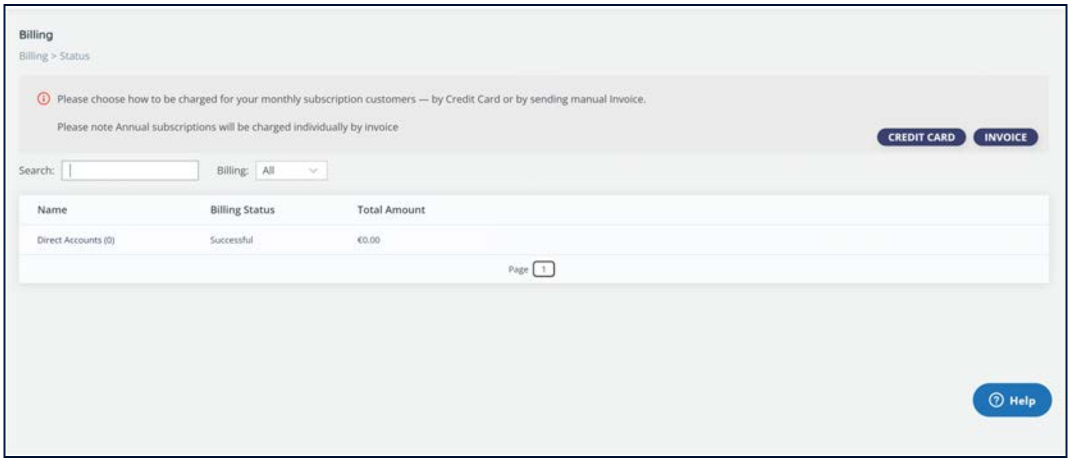
- Status
- History, and
- Payment Details



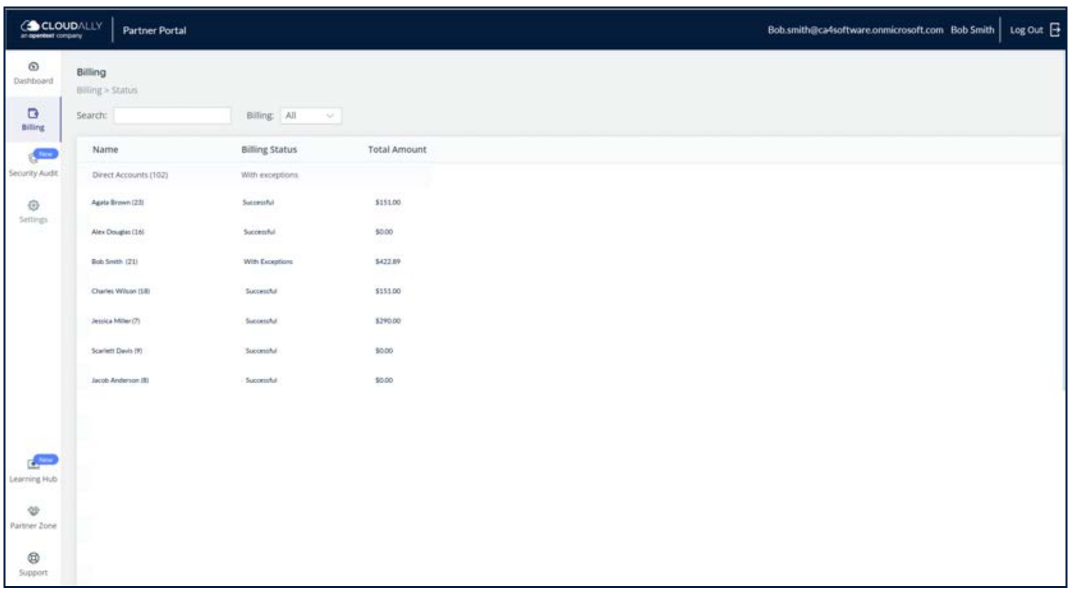

## 4.1 Status

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.



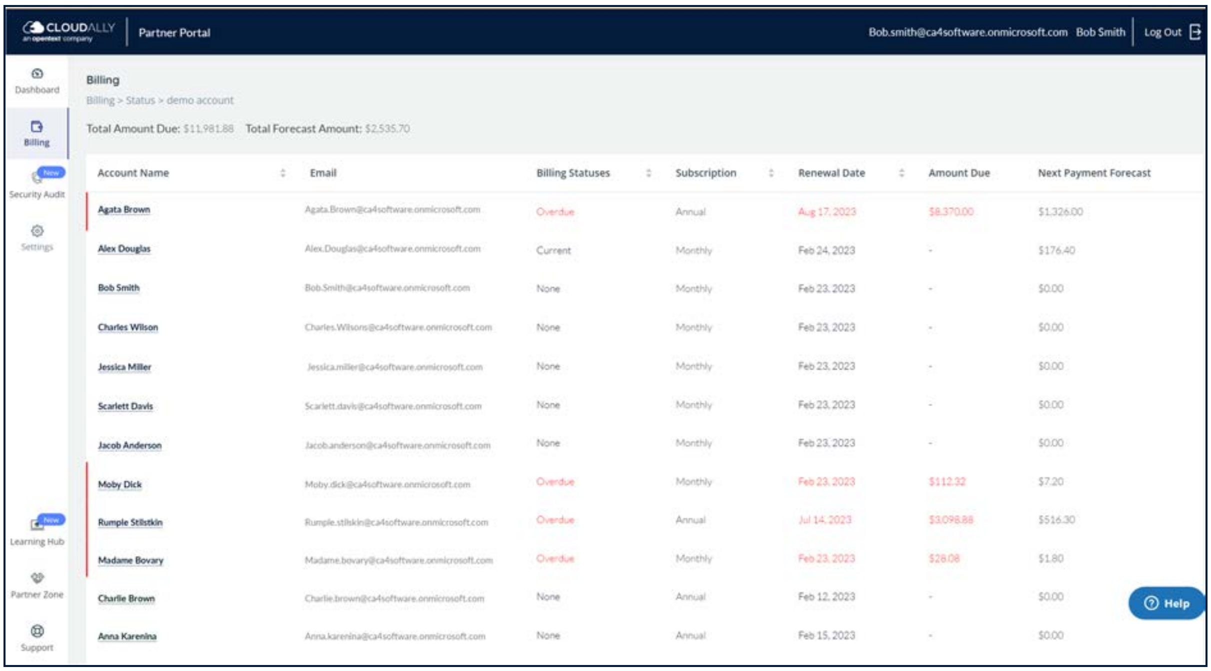

The **Billing Status** column gives a quick summary of the billing status of each of the customers' accounts.

- **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.

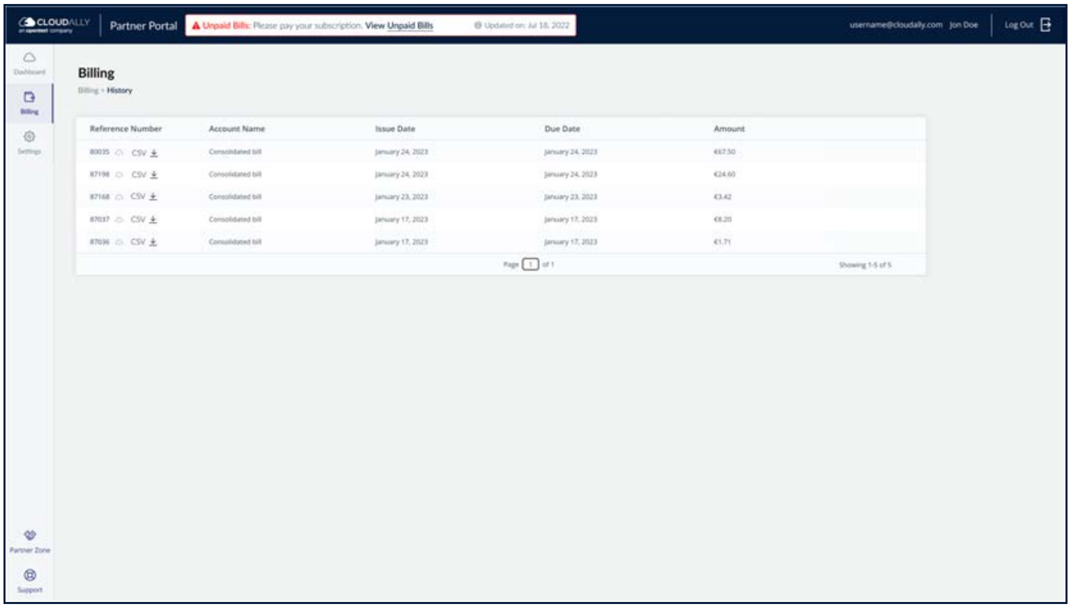



- The **Billing Statuses** field indicates that the account is either Due, Overdue, Current, or no bill has been issued yet (the customer is still in the trial period, or it is prior to the first bill).
- The **Subscription** field shows whether the customer has an Annual or Monthly subscription.
- The **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

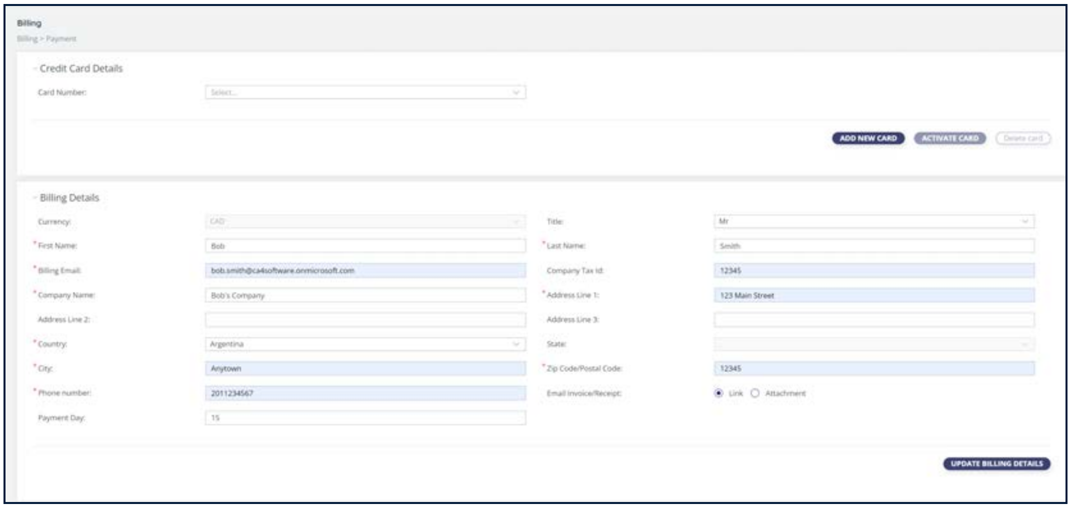
The *History* page allows you to view previous payments, and enables you to download PDFs of your past invoices/receipts by clicking the **Reference Number**.

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.

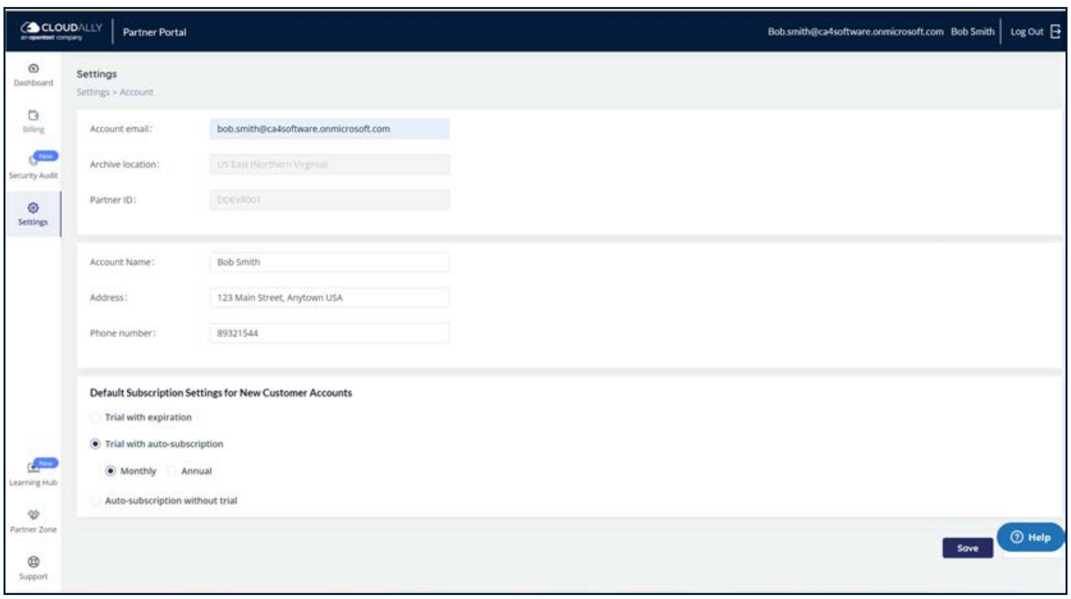



You will enter your billing details as part of your portal setup process. From the *Billing > Payment Details* page, enter your payment details, and click **Update Billing Details**.

# 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.

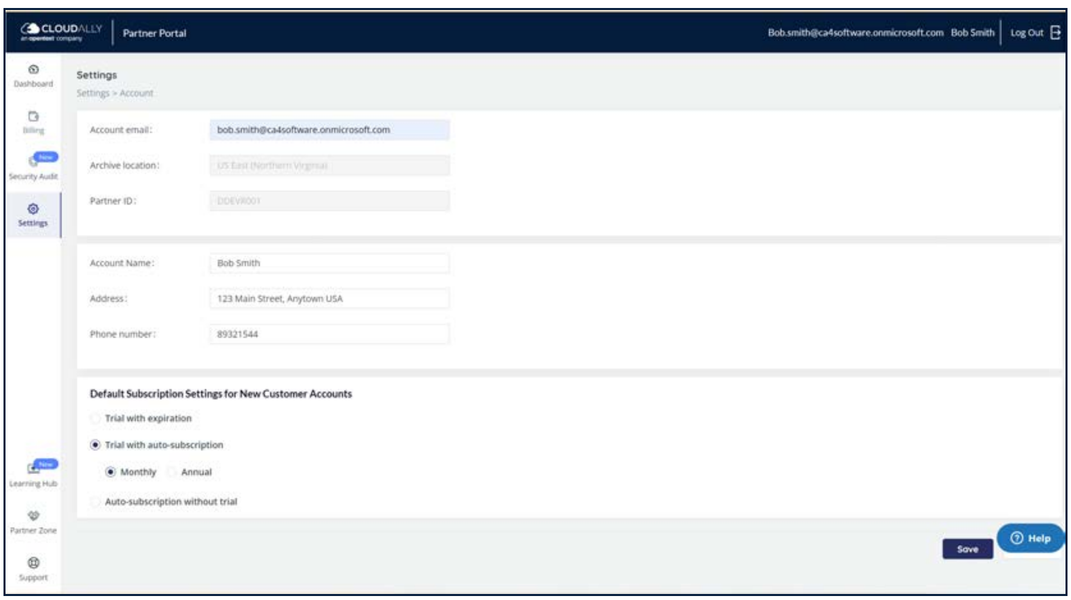
The storage location was set when your portal was configured during the registration process and it will be used as the default when setting up new accounts.

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:

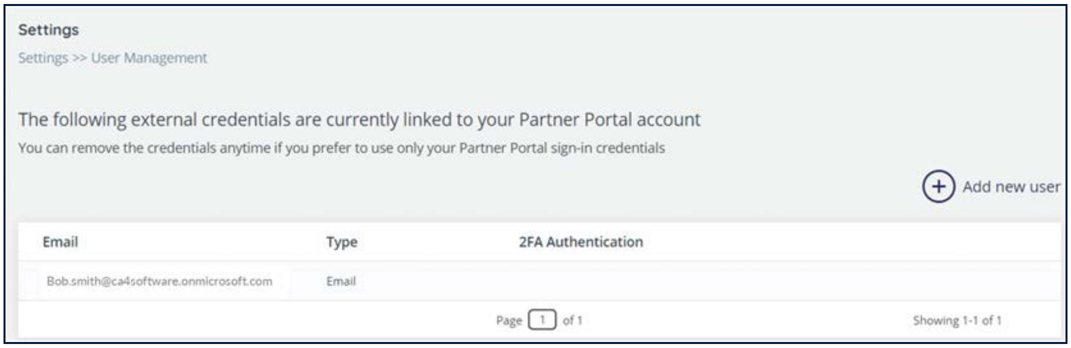
- Trial with expiration
- Trial with auto-subscription (Monthly or Annual billing)
- Auto-subscription without trial




## 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.

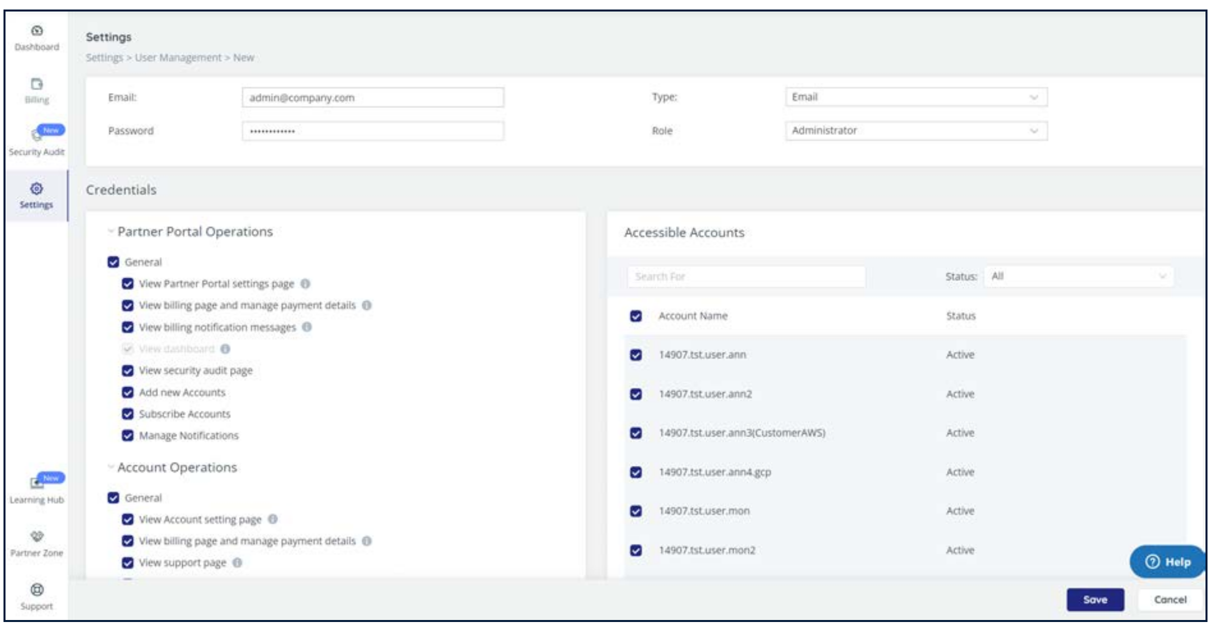
To add a new Distributor portal user, click **+ Add new user**, or click the pencil icon to edit an existing user's settings.




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.

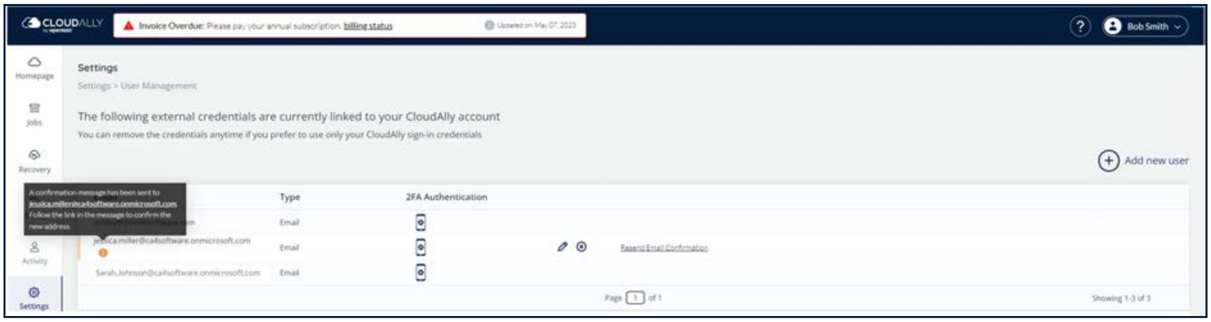
    a. If you choose Administrator, then all of the Operations and Accessible Accounts will be selected.

    b. If you choose Custom, then you can selectively add permissions.




To save changes, click **Save**.

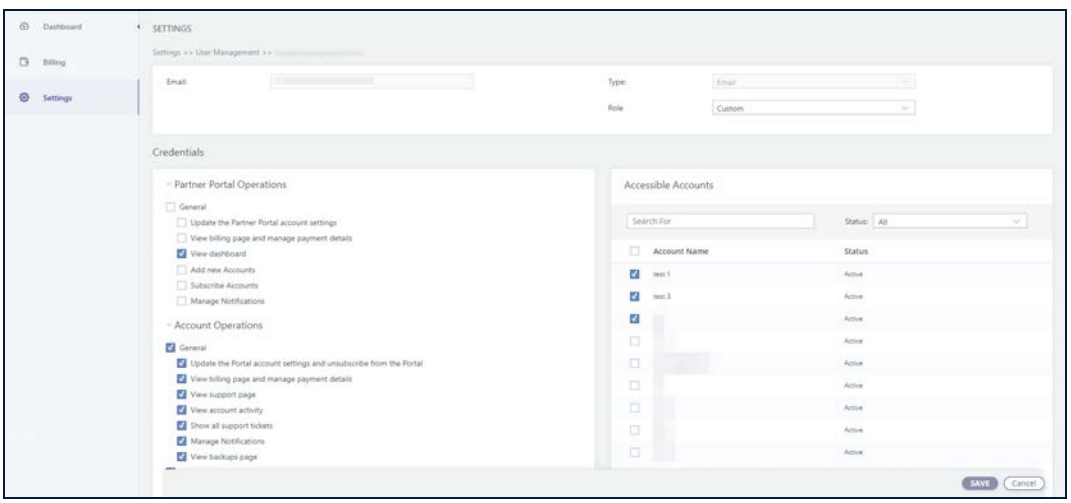
You will be returned to the *Settings* page. To complete the process, the user must confirm their email address using the link sent via email. This is a security measure, which ensures that the user's email address is valid.




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.

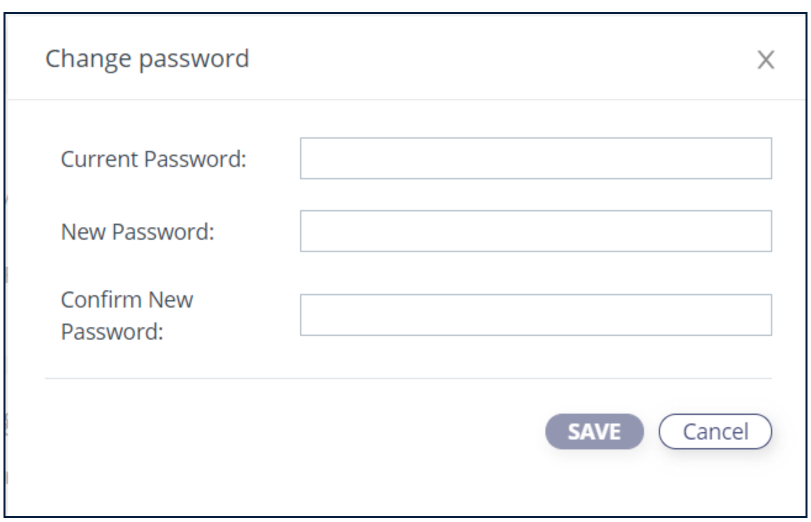

You can enable the password expiration option for all your users – the expiration policy will be enforced on their accounts.

### 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

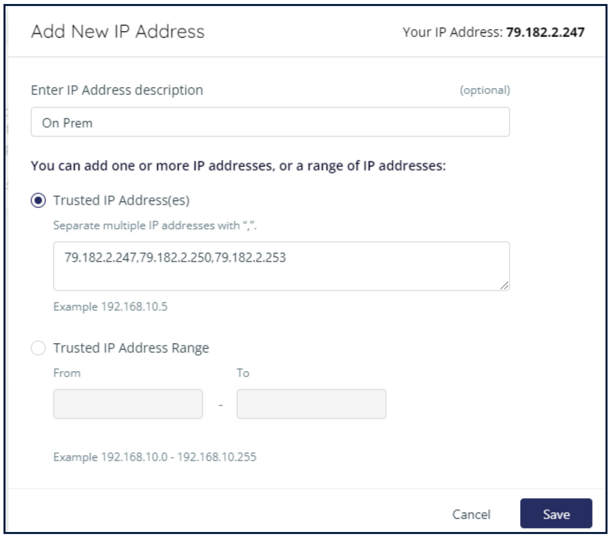
To enable IP restrictions in your account, first create the list of trusted IP addresses.

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

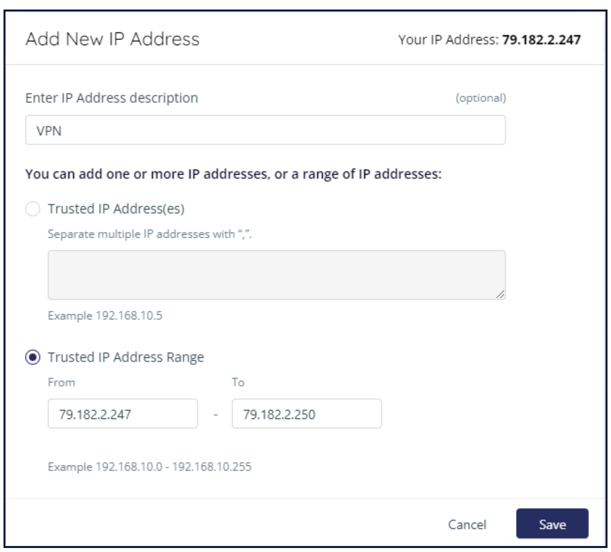
1. In the *Settings* panel, click **Security**, and then **IP Restrictions**.

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

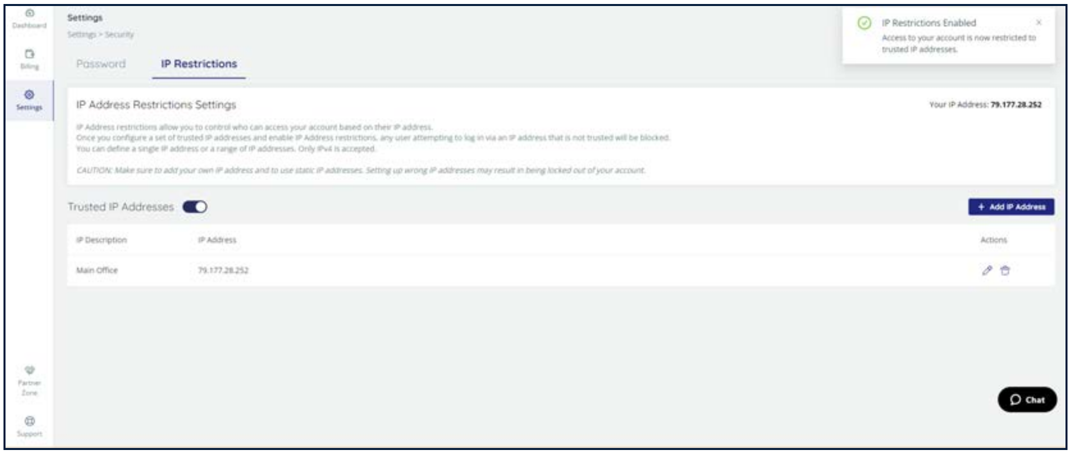
    a. Enter individual addresses separated by commas, and an optional description.




    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.



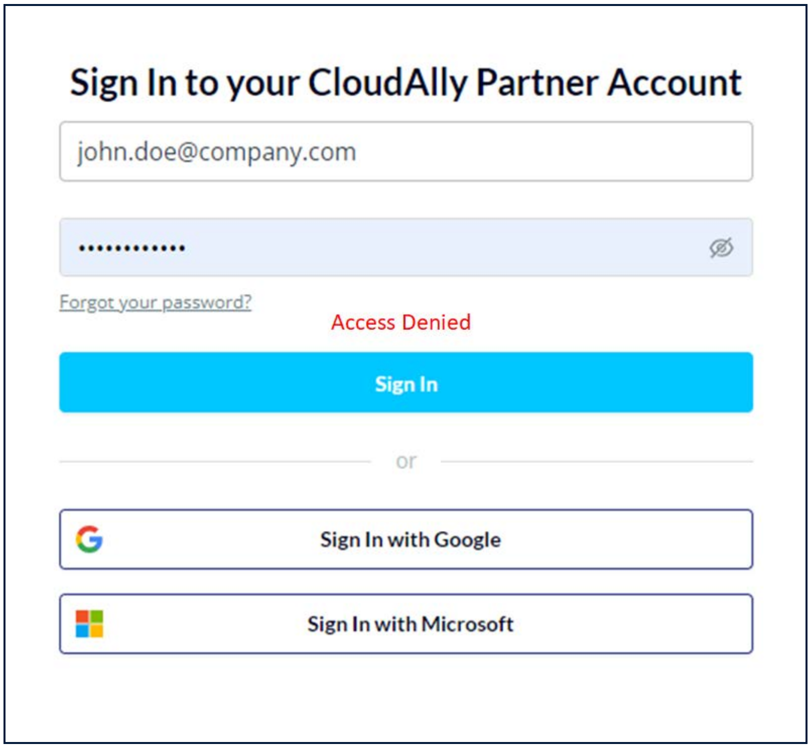

You can edit your list of addresses by clicking the pencil icon, or delete ones that you no longer want on your trusted list by clicking the trash icon.

> **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.

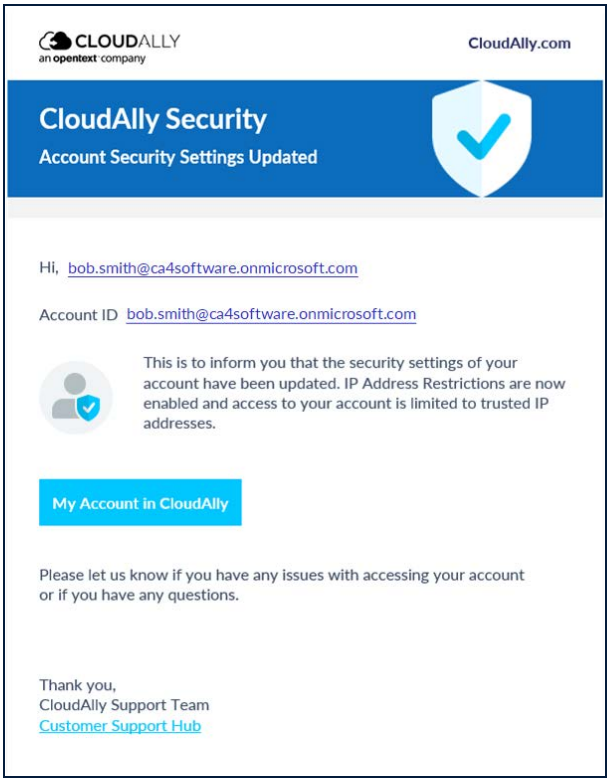
### Blocking Access

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

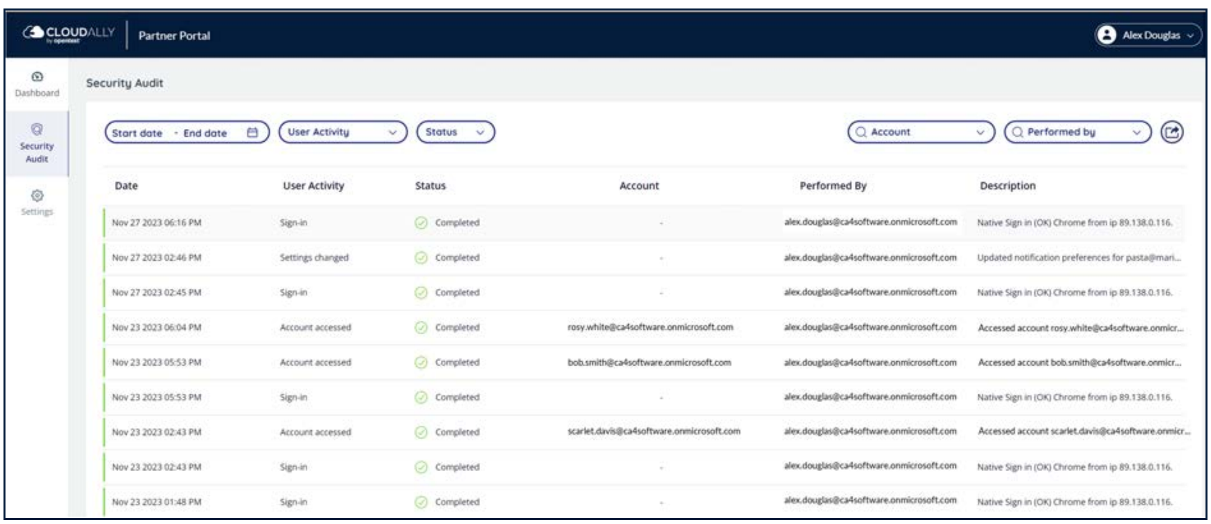
- Change billing details, such as credit card update
- Notification, such as export security audit

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:

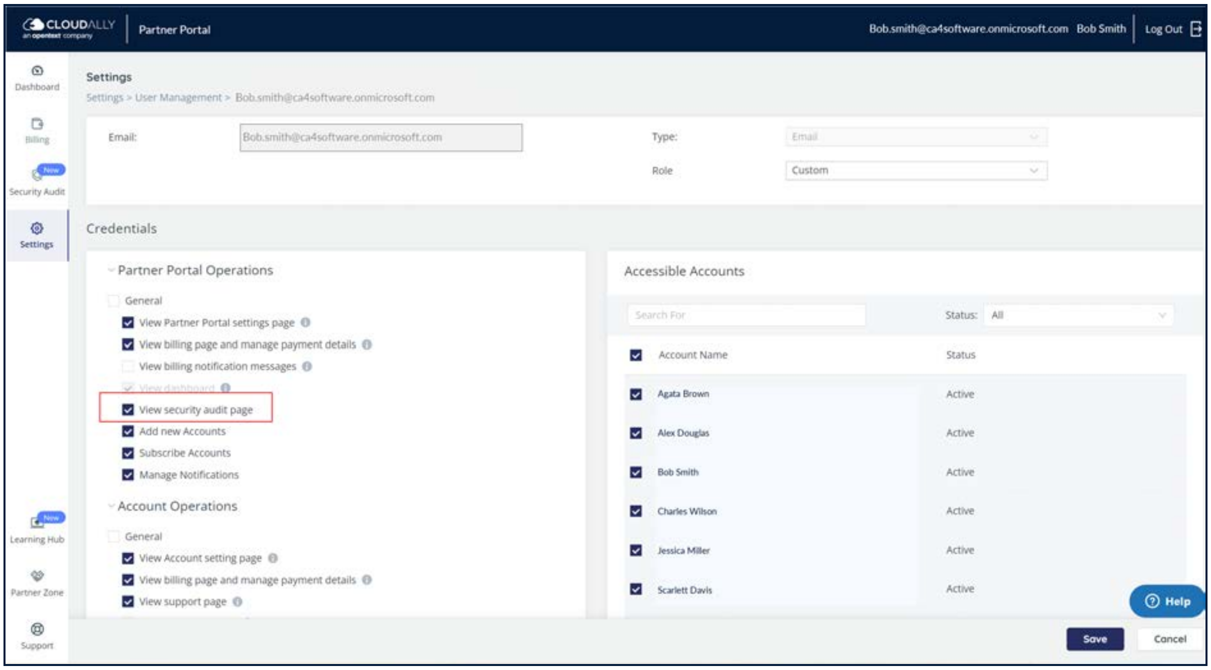
- Date range
- User activity type - sign-in, account accessed, billing details update, permissions changed, settings changed, notification, and trial canceled.
- Status
- Account - alphabetical list of all Partners' accounts,
- and the user performing the activity.

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




### 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.

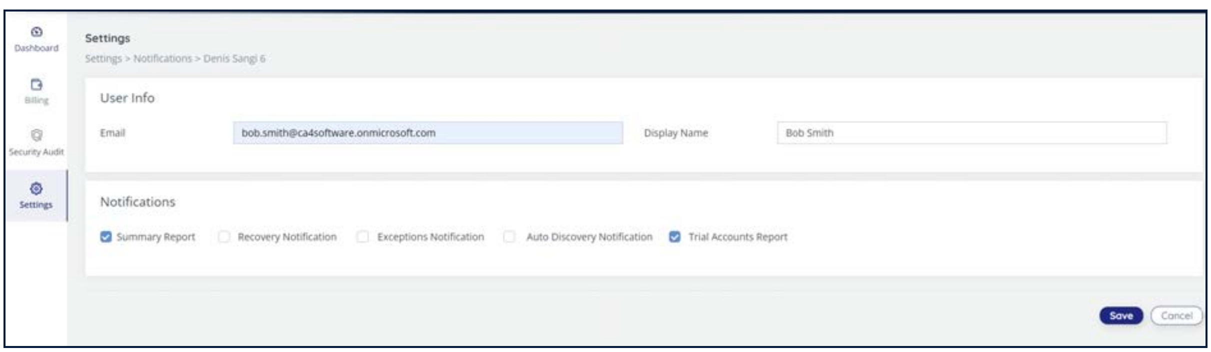
> **Note:** Existing Partners who already receive individual files per customer will continue to do so. Partners may change this option on the **Settings > Notifications** page.

- 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.

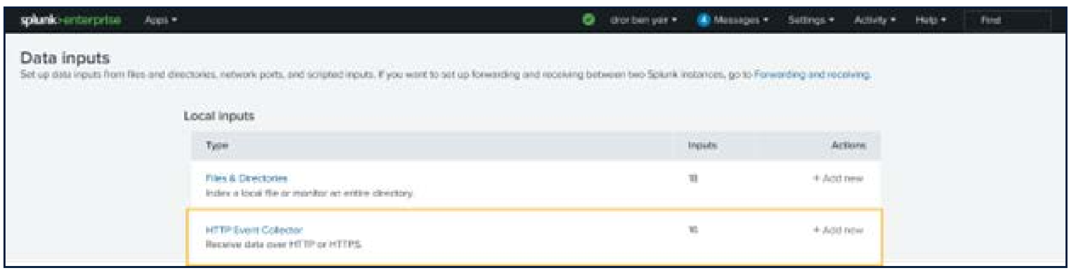
> **Note:** You can send events collected from your direct customers, and your Partner Portal account. Events from your Resellers and their customers are not supported.

### 5.6.1.3 Pre-requisite: Setting Up Your Splunk Account

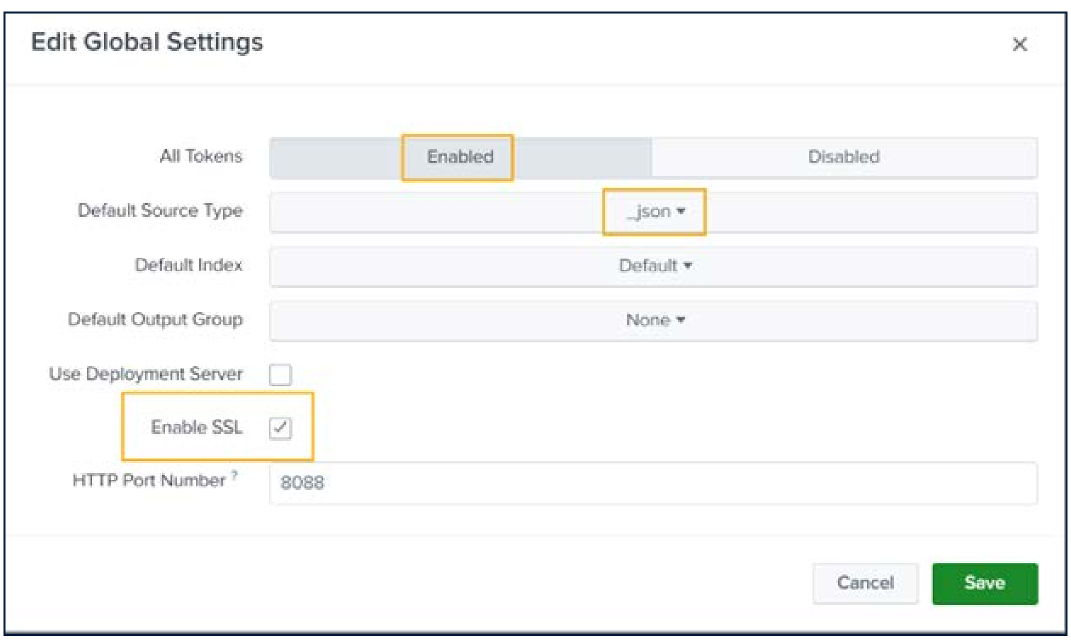
Before you can connect your CloudAlly Partner account to Splunk, you first need to establish an account with Splunk and configure the Splunk HTTP event collector.

**Perform the following steps in the Splunk Admin Console.**

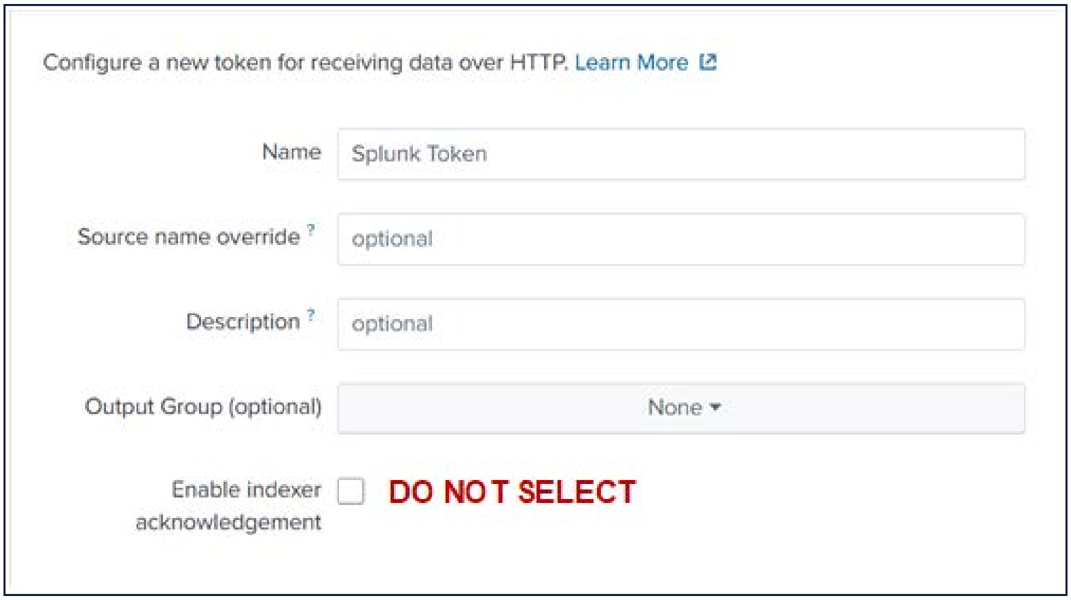
1. Navigate to **Settings>Data Inputs>HTTP Event Collector**.




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.



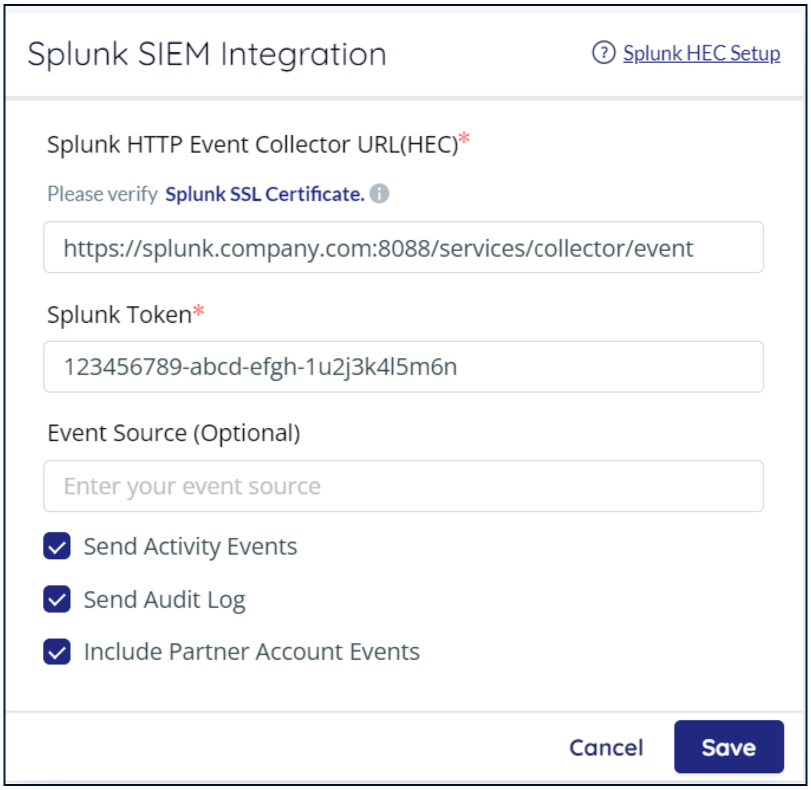

**IMPORTANT NOTE: Do NOT check "Enable indexer Acknowledgment."**

> **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.

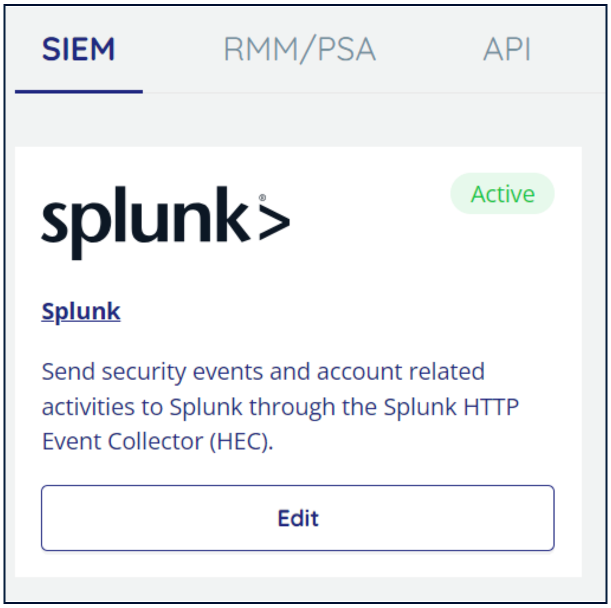
### 5.6.1.4 Setting Up Splunk in the Partner Portal

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

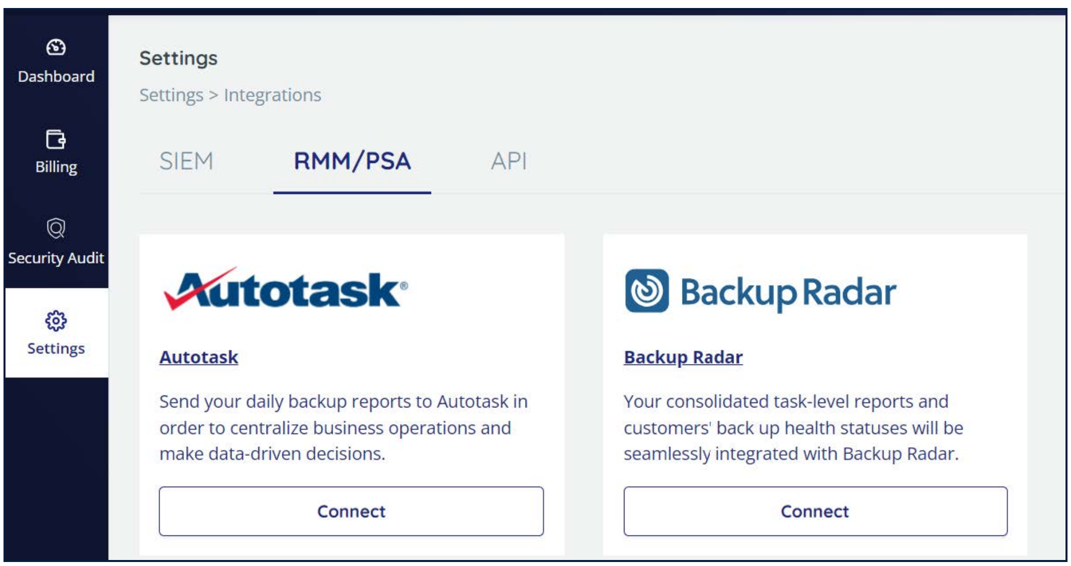



a. Enter the **Splunk HTTP Event Collector URL**.
b. Paste the token value that you copied into the Splunk Token field.
c. Optional: Add the **Event Source**, which is the override value to assign to the event data.

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.

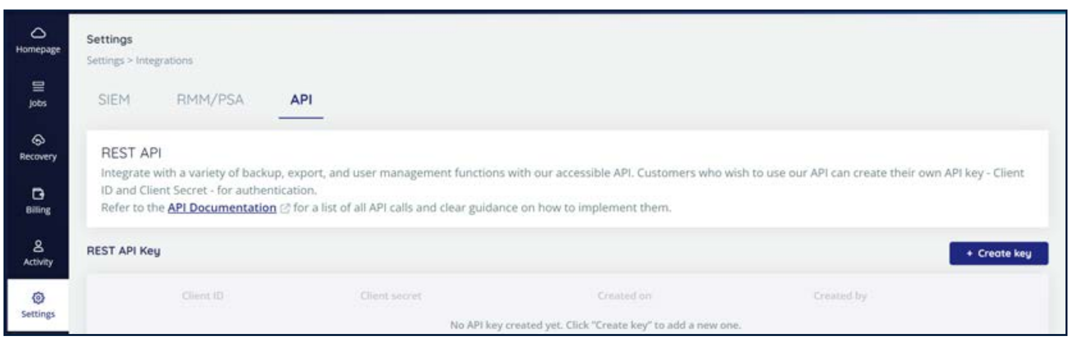
### 5.6.3 API

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.

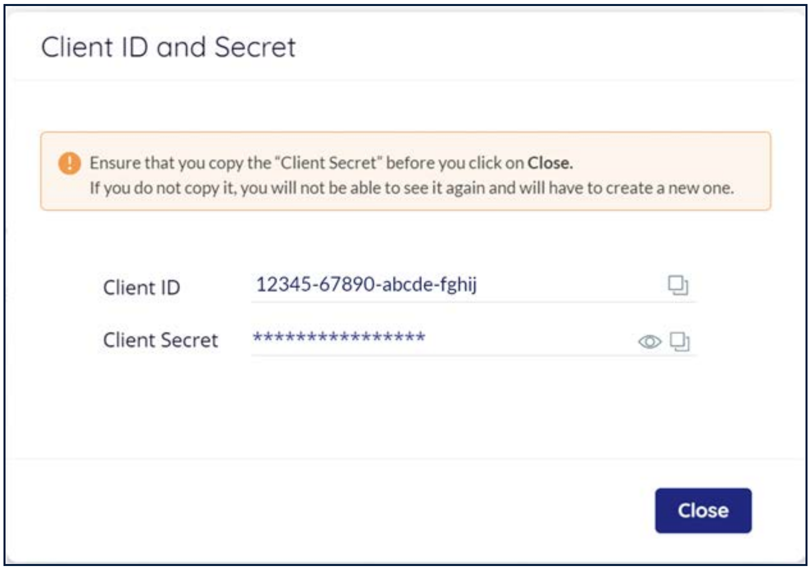
> **Note:** The Created On Date is not available for client IDs created prior to CloudAlly release 24.4.1.




#### 5.6.3.1 Creating a Key

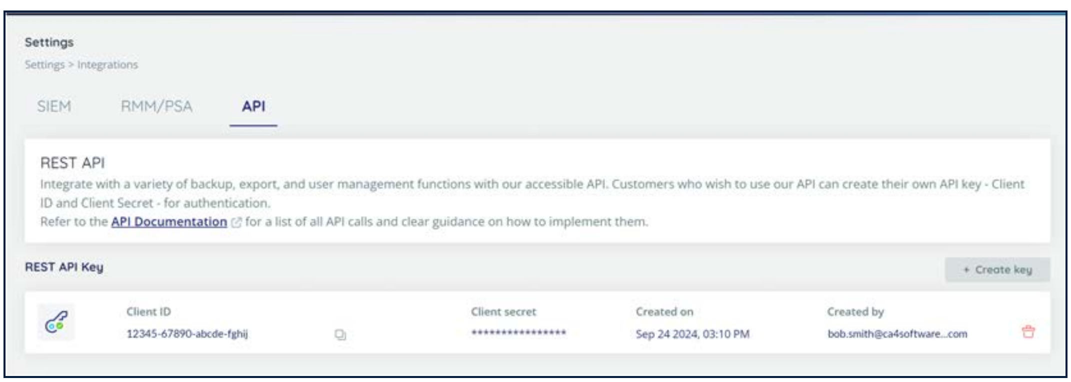
The first step towards integrating with our API is generating your own Client ID and Client Secret for authentication. Click **+Create key**.

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




> **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.




### 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.

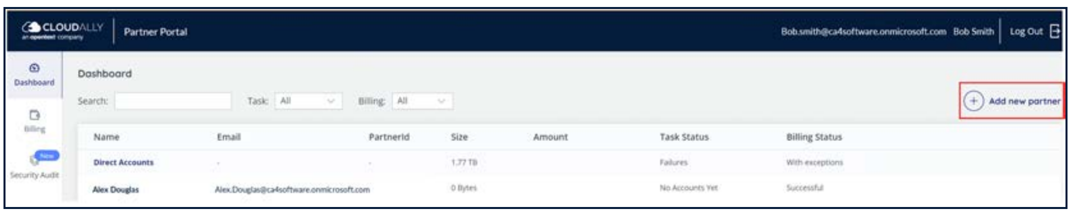
The complete list of CloudAlly API calls can be found here.

# 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. Theses email addresses cannot be reused within the CloudAlly partner portal for multiple customers - each must be unique.

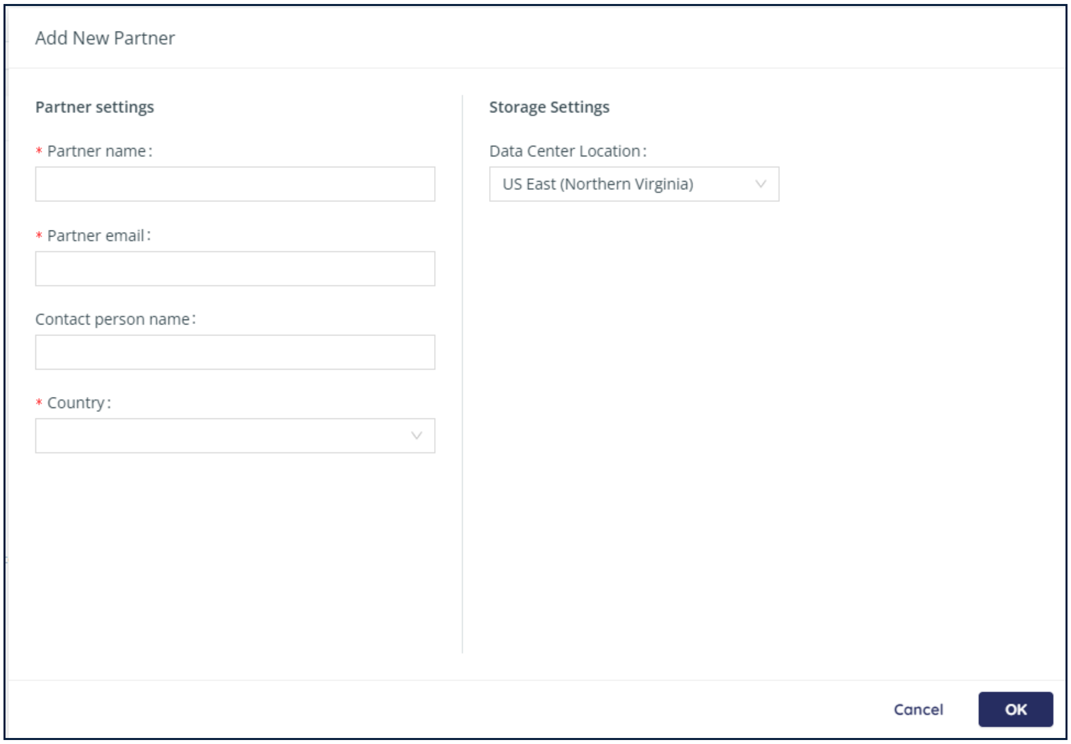
From the Distributor Portal, click **+Add New Partner**.




## 6.1 Partner Settings

Complete the following fields about your partner:

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

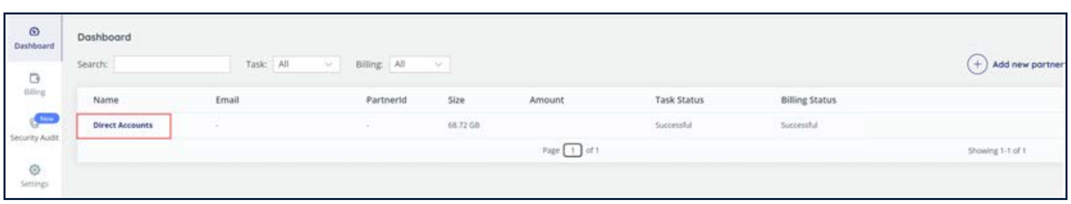



## 6.2 Storage Settings

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 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.

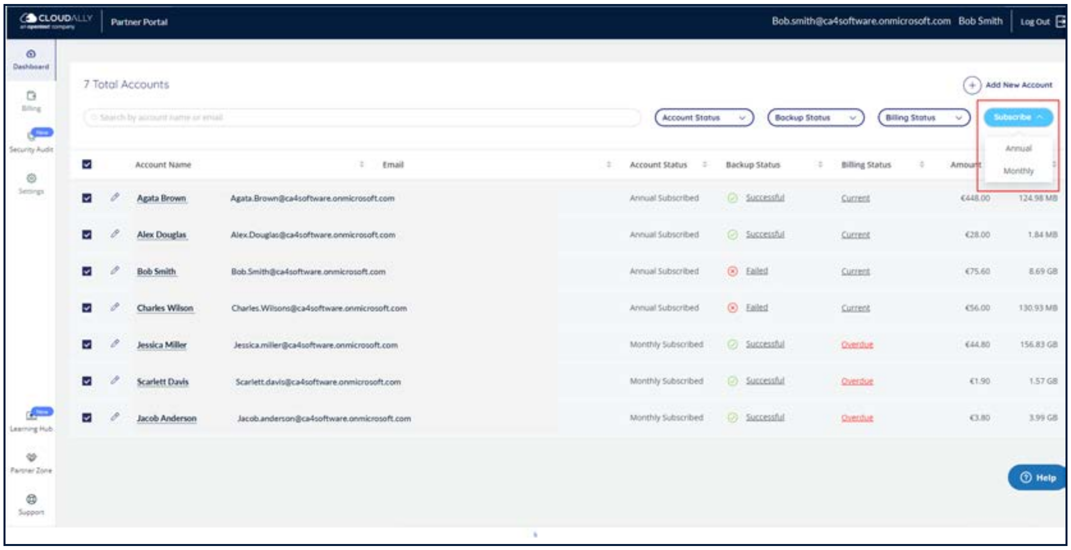
## 6.5 Subscribing a Trial Account

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**:



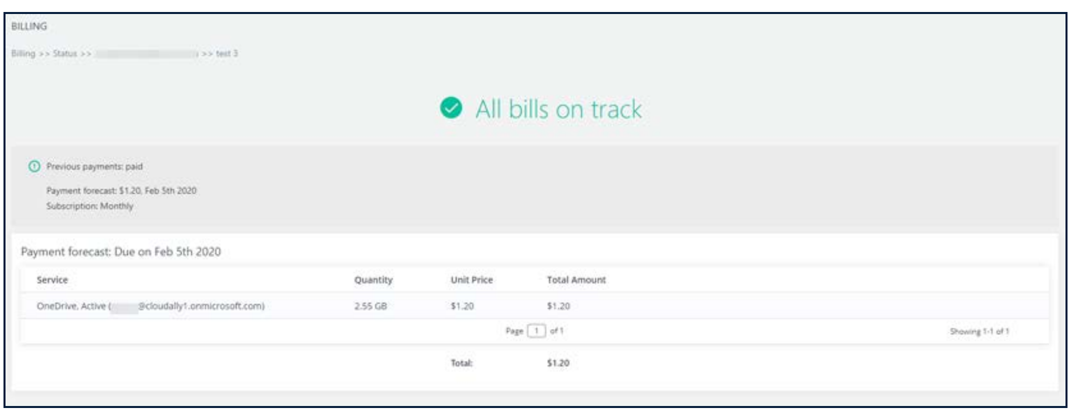

Only the trial accounts will be affected by this action. The accounts that are already subscribed with another type of subscription remain as they are.

## 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.

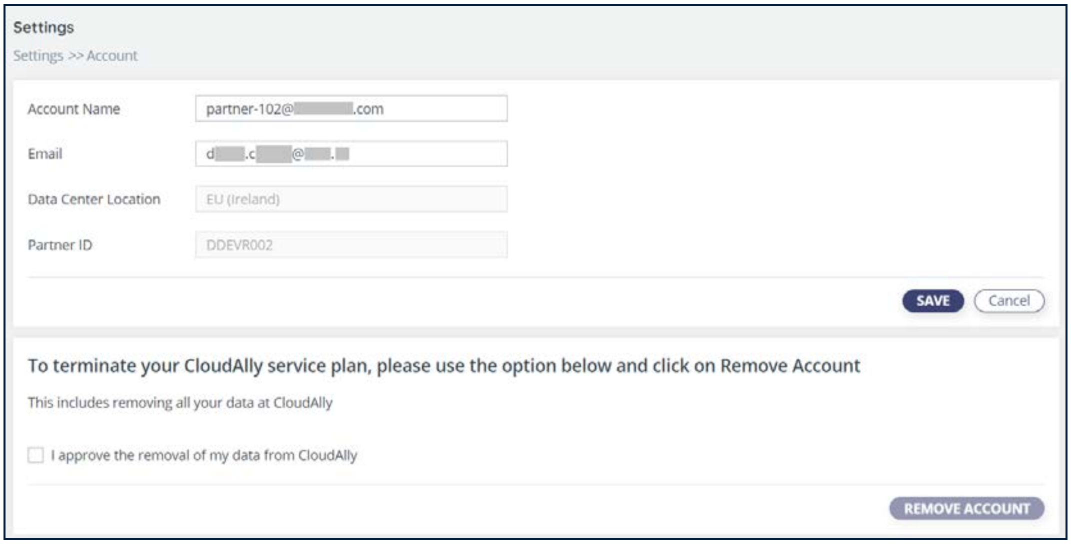
Click the account name to drill down to the account level for a detailed view of the billing information.



## 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**:




> **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

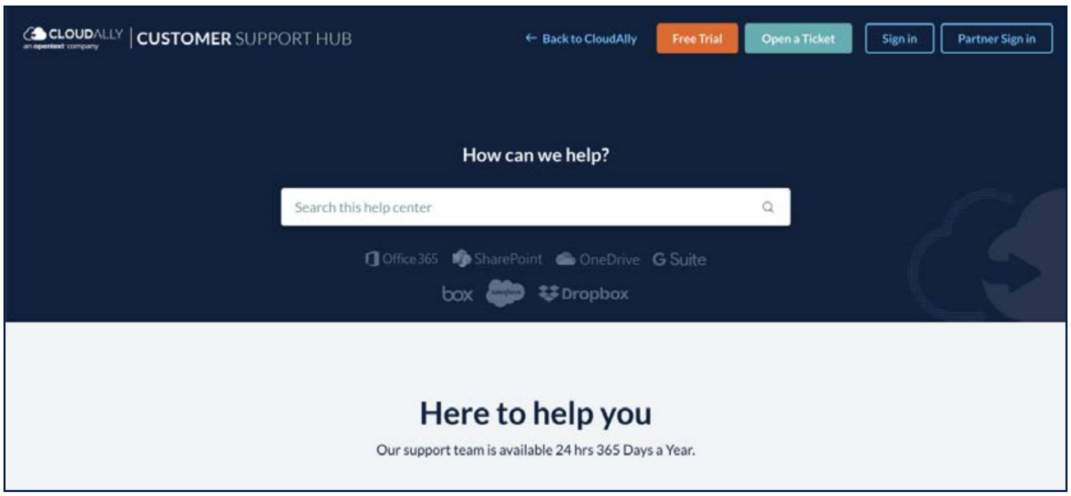
CloudAlly takes privacy seriously. Read our Privacy Policy at https://www.cloudally.com/privacy-policy

## 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

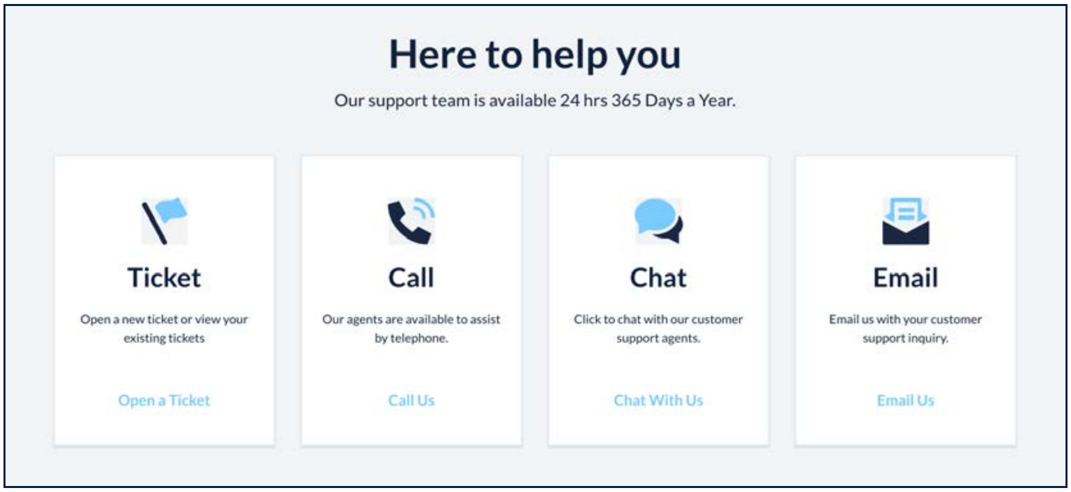
**Email Addresses:**

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.