

Distributor Portal

User Guide



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1 Preface

1.1 Welcome

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

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

1.2 Audience

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

1.3 What's in this Guide

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

- [Getting Started](#)
- [Using the Distributor Portal Dashboard](#)
- [Billing](#)
- [Settings](#)
- [Adding a New Partner](#)

2 Getting Started With Your CloudAlly™ Distributor Portal

2.1 Introduction to the Distributor Portal

The Distributor Portal is the hub of your operations – it provides the consolidated view of all your related client accounts and the ability to:

- Directly access the existing CloudAlly accounts
- Provision new CloudAlly accounts
- Manage security settings
- View and manage reports.

The logic of the partner-client relation is the following: the accounts of the clients you add contain your PartnerID or one of the IDs of the partners you have created with the User Management settings. The PartnerID was issued for you when you signed up with CloudAlly, and the IDs of the partners registered by you are derived from your PartnerID, and therefore linked to it.

The user email ID that you provided for portal login is added as a user to all your related CloudAlly clients' accounts. This gives you the ability to click through from the portal directly to a CloudAlly client account without logging in to each account.

The portal provides some advanced management tools, such as User Management, and Notifications Management.

To get started, login in to your portal at: <https://partners.cloudally.com/> with the credentials sent to you.

3 Using the Distributor Portal Dashboard

The navigation panel enables you to access the following functionality:

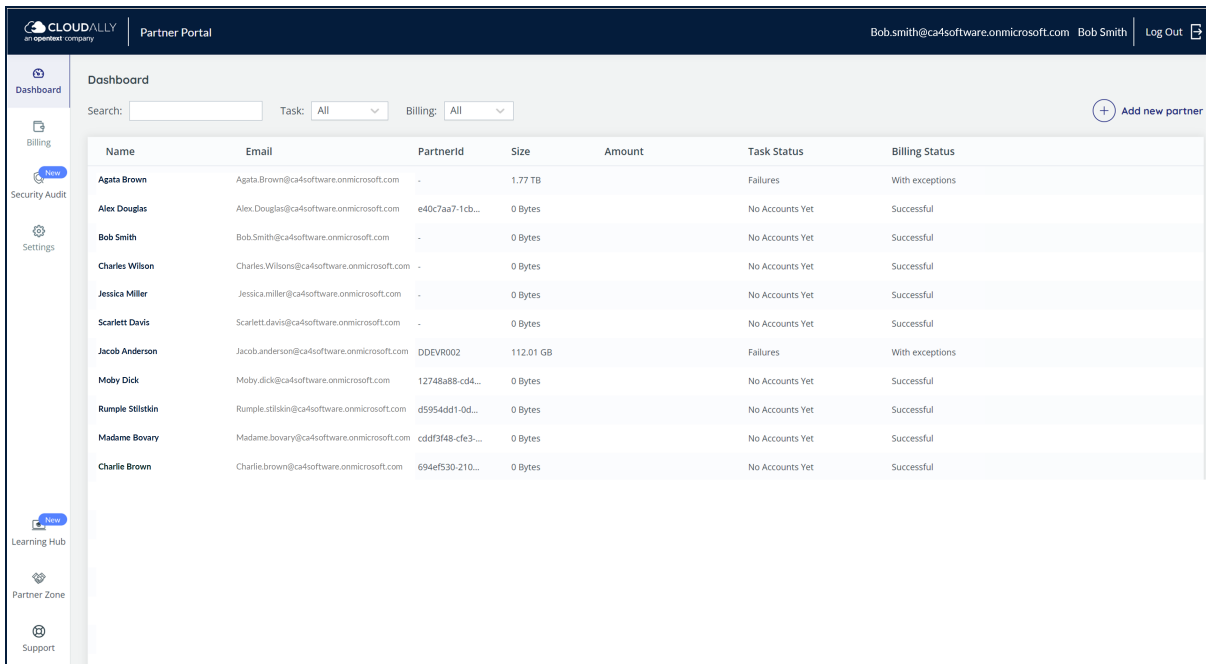
- Dashboard
- Billing
- Settings
- Learning Hub
- Partner Zone
- Support

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.



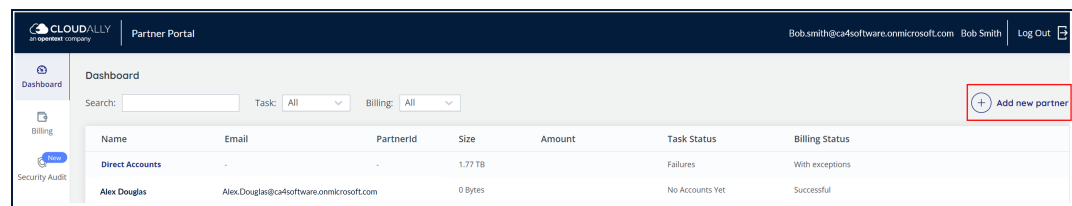
The screenshot shows the CloudAlly Partner Portal Dashboard. The header includes the CloudAlly logo, 'Partner Portal', and user information 'Bob.smith@ca4software.onmicrosoft.com Bob Smith' with a 'Log Out' button. The left sidebar contains navigation links: Dashboard, Billing, Security Audit, Settings, Learning Hub, Partner Zone, and Support. The main content area has a 'Dashboard' section with search and filter options. Below this is a table listing partners with columns: Name, Email, Partnerid, Size, Amount, Task Status, and Billing Status. A '+ Add new partner' button is in the top right of the table area.

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 Stikins	Rumple.Stikins@ca4software.onmicrosoft.com	d5954dd1-0d...	0 Bytes		No Accounts Yet	Successful
Madame Bovary	Madame.Bovary@ca4software.onmicrosoft.com	cdcf3f48-cfe3...	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

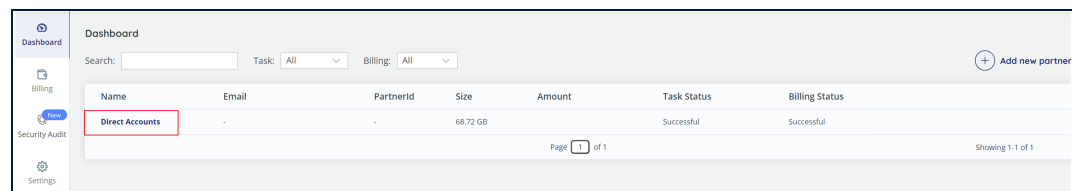
The Distributor Portal dashboard enables you to:

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

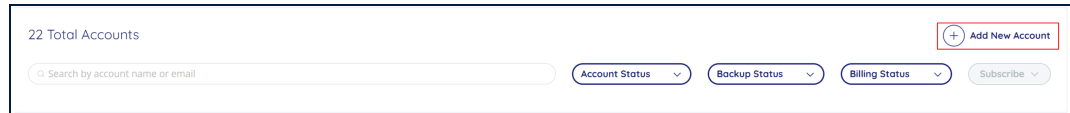


This screenshot is similar to the previous one but highlights the '+ Add new partner' button in the top right corner of the table area with a red rectangle.

- 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 'Direct Accounts' row in the table highlighted with a red rectangle. The table shows one entry for 'Direct Accounts' with a size of 68.72 GB and a successful status. The page number 'Page 1 of 1' and 'Showing 1-1 of 1' are visible at the bottom.

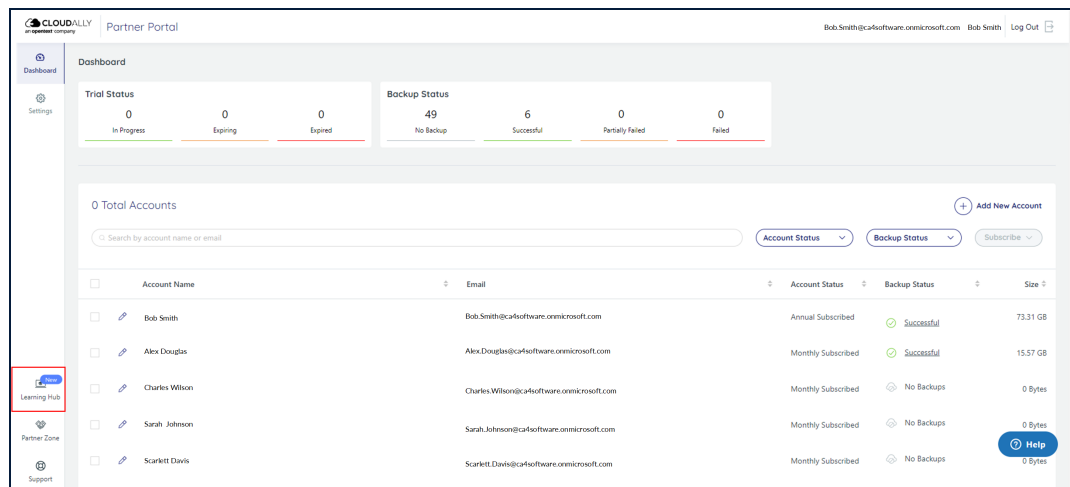


Filters

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

3.2 Learning Hub

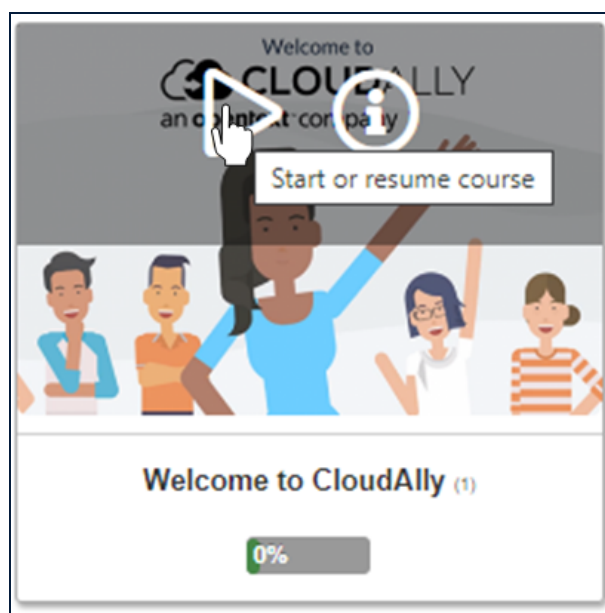
CloudAlly provides you with a rich collection of instructional videos, which will teach you how to perform tasks such as backup activation and setting up an account. You can access the Learning Hub from the Navigation Panel.



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

The screenshot shows the CloudAlly Learning Hub dashboard. At the top, the header includes the CloudAlly logo, the text "LEARNING HUB", and user information "learner learner | Learner". There are links for "Messages" and a search bar. Below the header, the "Home" section displays a "Progress" overview with statistics: 16 courses in progress, 0 courses not passed, 3 completed courses, 9h 45m training time, and 0 certifications. A search bar for courses is also present. The "Partner Portal" section is highlighted, showing a list of videos under the heading "1. Getting to Know the Partner Portal". Two video thumbnails are visible: "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 .



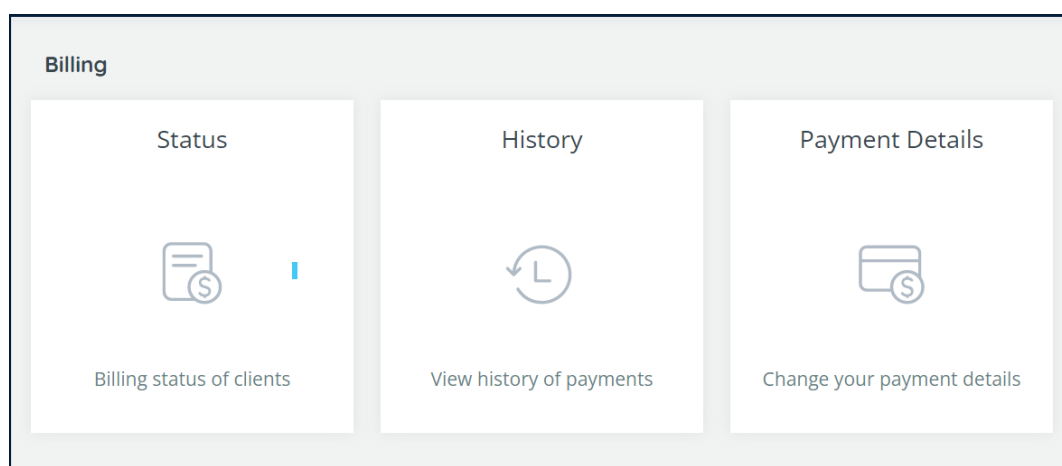
4

>

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.

Billing

Billing > Status

1

Please choose how to be charged for your monthly subscription customers — by Credit Card or by sending manual Invoice.

Please note Annual subscriptions will be charged individually by invoice

CREDIT CARD

INVOICE

Search:

Billing: All

Name	Billing Status	Total Amount
Direct Accounts (0)	Successful	€0.00

Page 1

Help

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.

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Partner Portal

Bob.smith@cs4software.onmicrosoft.com Bob Smith Log Out

Dashboard

Billing

Security Audit

Settings

Learning Hub

Partner Zone

Support

Billing

Billing > Status

Search:

Billing: All

Name	Billing Status	Total Amount
Direct Accounts (102)	With exceptions	
Agata Brown (28)	Successful	\$151.00
Alan Douglas (14)	Successful	\$0.00
Bob Smith (21)	With Exceptions	\$422.89
Charles Wilson (18)	Successful	\$151.00
Jessica Miller (7)	Successful	\$290.00
Scarlett Davis (9)	Successful	\$0.00
Jacob Anderson (8)	Successful	\$0.00

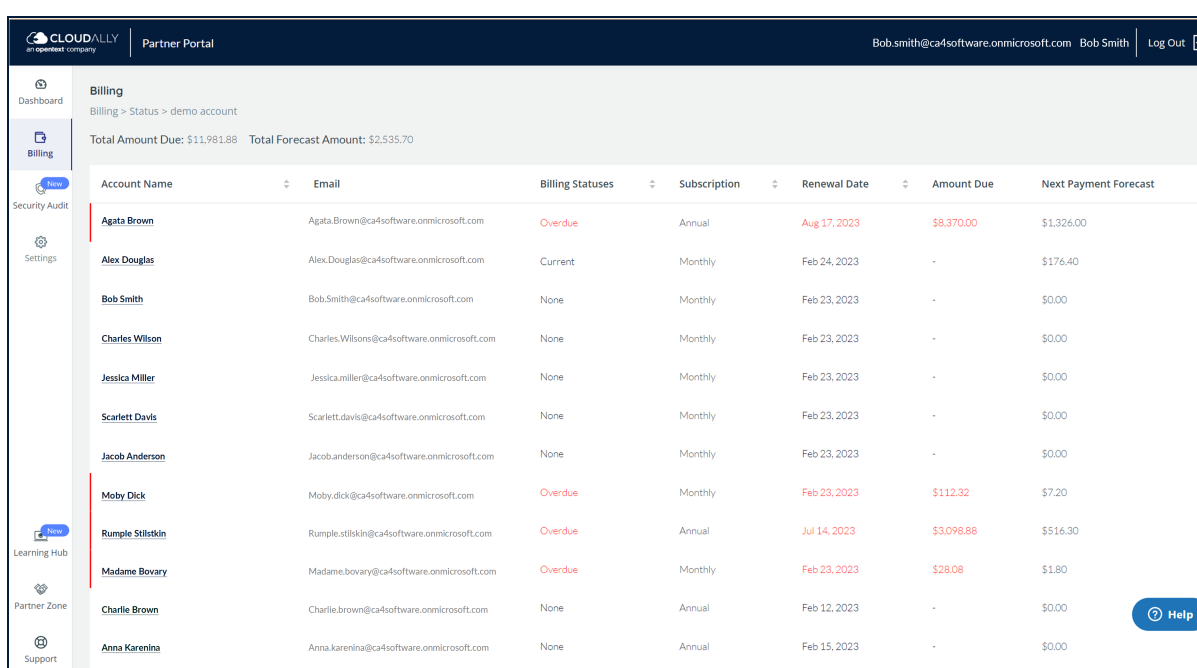
The **Billing Status** column gives a quick summary of the billing status of each of the customers' accounts.

- **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 CloudAlly Partner Portal. It displays a table of customer accounts 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 Stiltskin (Overdue), Madame Bovary (Overdue), Charlie Brown (None), and Anna Karenina (None). A sidebar on the left contains navigation links for Dashboard, Billing, Security Audit, Settings, Learning Hub, Partner Zone, and Support. A top navigation bar shows the user's email (Bob.smith@ca4software.onmicrosoft.com) and a Log Out button.

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 Stiltskin	Rumpel.stiltskin@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 the payment invoices/receipts:

Billing				
Billing >> History				
Reference Number	Account Name	Issue Date	Due Date	Amount
68030 	demo-8930_monthly4	October 30, 2020	October 30, 2020	\$3.24
67718 	Consolidated bill	October 15, 2020	October 15, 2020	\$4.86
67717 	Consolidated bill	October 15, 2020	October 15, 2020	\$12.00
50066 	demo-8930_annual2	October 14, 2020	November 14, 2020	\$36.00
50065 	demo-8930_annual	October 14, 2020	November 14, 2020	\$18.00
67678 	Consolidated bill	October 14, 2020	October 14, 2020	\$10.26
67676 	Consolidated bill	October 14, 2020	October 14, 2020	\$12.00
67631 	Consolidated bill	October 13, 2020	October 13, 2020	\$1.08
67630 	Consolidated bill	October 13, 2020	October 13, 2020	\$1.08
Page 1 of 1 Showing 1-9 of 9				

The **Reference Number** column contains the links to the invoice documents that can be downloaded.

4.3 Payment Details

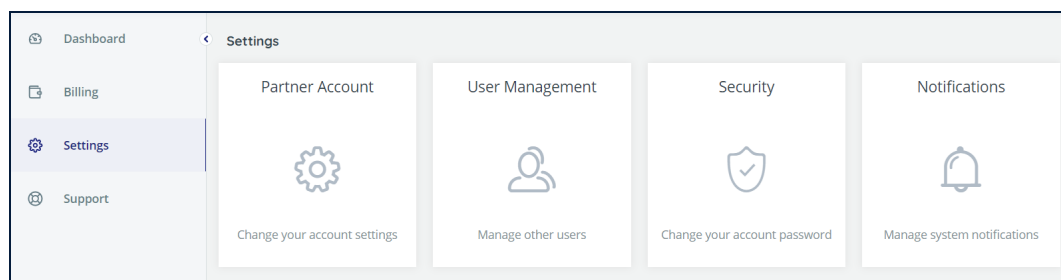
The *Payment Details* page contains your credit card number and billing address for monthly subscriptions.

Billing						
Billing > Payment						
Credit Card Details						
Card Number:	<input type="text" value="Select..."/>					
				<input type="button" value="ADD NEW CARD"/> <input type="button" value="ACTIVATE CARD"/> <input type="button" value="Delete card"/>		
Billing Details						
Currency:	<input type="text" value="CAD"/>	Title:	<input type="text" value="Mr"/>			
* First Name:	<input type="text" value="Bob"/>	* Last Name:	<input type="text" value="Smith"/>			
* Billing Email:	<input type="text" value="bob.smith@casoftware.onmicrosoft.com"/>	Company Tax Id:	<input type="text" value="12345"/>			
* Company Name:	<input type="text" value="Bob's Company"/>	Address Line 1:	<input type="text" value="123 Main Street"/>			
Address Line 2:	<input type="text"/>	Address Line 3:	<input type="text"/>			
* Country:	<input type="text" value="Argentina"/>	State:	<input type="text"/>			
* City:	<input type="text" value="Anytown"/>	* Zip Code/Postal Code:	<input type="text" value="12345"/>			
* Phone number:	<input type="text" value="2011234567"/>	Email Invoice/Receipt:	<input checked="" type="radio"/> Link <input type="radio"/> Attachment			
Payment Day:	<input type="text" value="15"/>					
<input type="button" value="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

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 left sidebar contains navigation links: Dashboard, Billing, Security Audit, Settings (highlighted), Learning Hub, Partner Zone, and Support. The main content area is divided into two sections. The top section, 'Account', contains fields for 'Account email' (bob.smith@ca4software.onmicrosoft.com), 'Archive location' (US East (Northern Virginia)), 'Partner ID' (DDEV001), 'Account Name' (Bob Smith), 'Address' (123 Main Street, Anytown USA), and 'Phone number' (89321544). The bottom section, 'Default Subscription Settings for New Customer Accounts', features three radio button options: 'Trial with expiration', 'Trial with auto-subscription' (selected), and 'Auto-subscription without trial'. Under the selected option, there are sub-options for 'Monthly' (selected) and 'Annual'. At the bottom right, there are 'Save' and 'Help' buttons.

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 on the [edit](#) 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

Users can be added by either Email credentials, or by Azure, Google+, or Facebook OpenID. Select the Type from the dropdown menu, and then enter the user's email ID. 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.

Dashboard
Billing
Settings

SETTINGS

Settings >> User Management >>

Email:
Type:
Role:

Credentials

Partner Portal Operations

☐ General

☐ Update the Partner Portal account settings
☐ View billing page and manage payment details
☒ View dashboard
☐ Add new Accounts
☐ Subscribe Accounts
☐ Manage Notifications

Account Operations

☒ General

☒ Update the Portal account settings and unsubscribe from the Portal
☒ View billing page and manage payment details
☒ View support page
☒ View account activity
☒ Show all support tickets
☒ Manage Notifications
☒ View backups page


Accessible Accounts

Search For:
Status:

Account Name	Status
<input checked="" type="checkbox"/> test 1	Active
<input checked="" type="checkbox"/> test 3	Active
<input checked="" type="checkbox"/>	Active
<input type="checkbox"/>	Active
<input type="checkbox"/>	Active
<input type="checkbox"/>	Active
<input type="checkbox"/>	Active
<input type="checkbox"/>	Active

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.

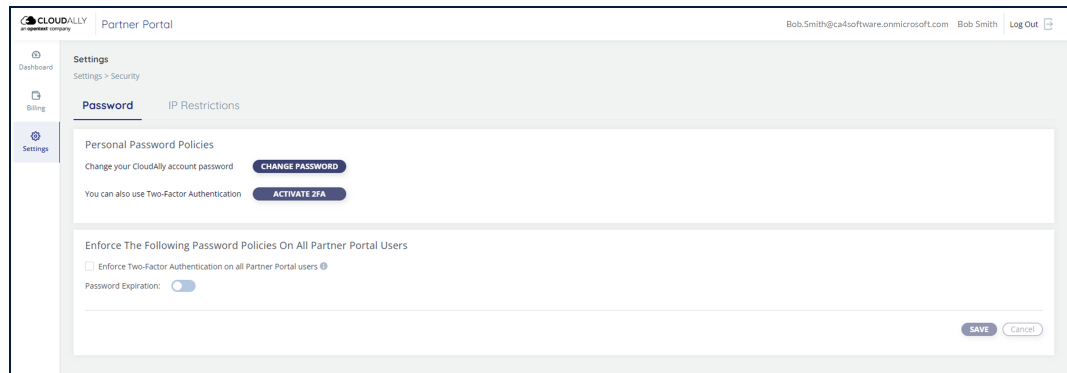

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DP UG - CE 23.1.1
Rev. Date: March 5, 2023

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.

Change password

Current Password:

New Password:

Confirm New Password:

SAVE

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.

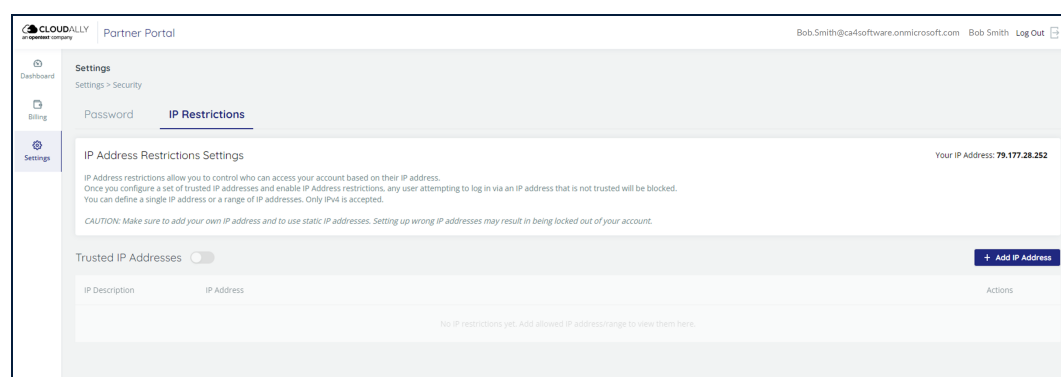
Setting Up IP Restrictions

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**.



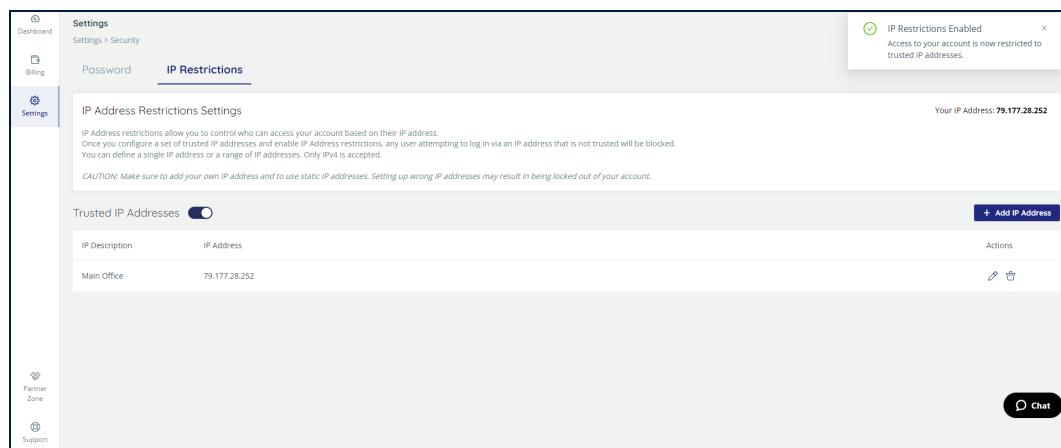
2. Click **+ Add IP Address**.
3. Enter one or more IP addresses:
 - a. Enter individual addresses separated by commas, and an optional description.

The screenshot shows the 'Add New IP Address' form. At the top right, it says 'Your IP Address: 79.182.2.247'. Below the title, there is a text input field for 'Enter IP Address description (optional)' with the value 'On Prem'. A message states 'You can add one or more IP addresses, or a range of IP addresses:'. Two radio buttons are present: 'Trusted IP Address(es)' (selected) and 'Trusted IP Address Range'. Under the selected option, there is a text input field containing '79.182.2.247,79.182.2.250,79.182.2.253' and an example '192.168.10.5'. 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 the title, there is a text input field for 'Enter IP Address description (optional)' with the value 'VPN'. A message states 'You can add one or more IP addresses, or a range of IP addresses:'. Two radio buttons are present: 'Trusted IP Address(es)' and 'Trusted IP Address Range' (selected). Under the selected option, there are two input fields: 'From' with the value '79.182.2.247' and 'To' with the value '79.182.2.250'. An example '192.168.10.0 - 192.168.10.255' is shown below. 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 [✎](#), or delete ones that you no longer want on your trusted list by clicking [🗑](#).

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

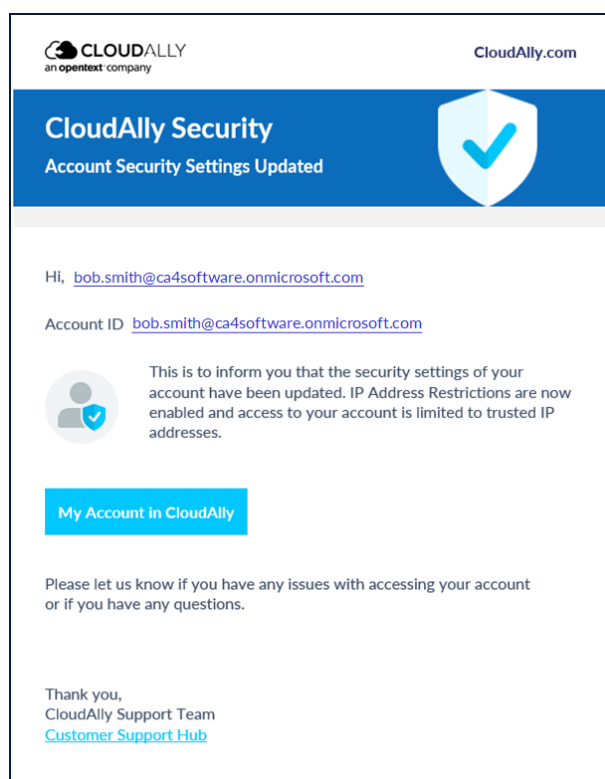
or

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 were performed by your account users. The user activity that is displayed includes:

- Sign-in
- Settings changed
- Notification

The page includes the date of the event, the type of activity, the status of the activity, and the user performing the activity. You can filter the actions by activity type, status, and user performing the activity.

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

Partner Portal

Bob.Smith@ca4software.onmicrosoft.com Bob Smith Log Out

Dashboard

Billing

New Security Audit

Settings

Support

Security Audit

Start Date - End Date User Activity Status Performed by Account

Sign in Clear Filters

Date	User activity	Status	Account	Performed by	Description
Jun 04, 2022 17:45 PM	Sign-in	Completed	-	john.doe@acme.com	Native sign in (OK) Chrome...
Jun 04, 2022 17:45 PM	Sign-in	Completed	-	john.doe@acme.com	Native sign in (OK) Chrome...
Jun 04, 2022 17:45 PM	Sign-in	Completed	-	john.doe@acme.com	Native sign in (OK) Chrome...
Jun 04, 2022 17:45 PM	Sign-in	Completed	-	john.doe@acme.com	Native sign in (OK) Chrome...
Jun 04, 2022 17:45 PM	Sign-in	Completed	-	john.doe@acme.com	Native sign in (OK) Chrome...
Jun 04, 2022 17:45 PM	Sign-in	Completed	-	john.doe@acme.com	Native sign in (OK) Chrome...
Jun 04, 2022 17:45 PM	Sign-in	Completed	-	john.doe@acme.com	Native sign in (OK) Chrome...
Jun 04, 2022 17:45 PM	Sign-in	Completed	-	john.doe@acme.com	Native sign in (OK) Chrome...
Jun 04, 2022 17:45 PM	Sign-in	Completed	-	john.doe@acme.com	Native sign in (OK) Chrome...
Jun 04, 2022 17:45 PM	Sign-in	Completed	-	john.doe@acme.com	Native sign in (OK) Chrome...

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.

Settings
 Settings > User Management > Bob.smith@ca4software.onmicrosoft.com

Email: Bob.smith@ca4software.onmicrosoft.com Type: Email Role: Custom

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"/> Agata Brown	Active
<input checked="" type="checkbox"/> Alex Douglas	Active
<input checked="" type="checkbox"/> Bob Smith	Active
<input checked="" type="checkbox"/> Charles Wilson	Active
<input checked="" type="checkbox"/> Jessica Miller	Active
<input checked="" type="checkbox"/> Scarlett Davis	Active

Save Cancel Help

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, and backup exception notifications. You can control the general settings of the notification, such as the frequency of reports (daily, weekly or monthly), and whether the CSV backup detail report is included as an attachment or provided via a link in the email.

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

Settings
 Settings > Notifications

Summary Report ☒

Provide as:

☐ CSV Attachment

☒ Download Link

Report Frequency: Once A Day

☒ Send the report only in case of backup failure

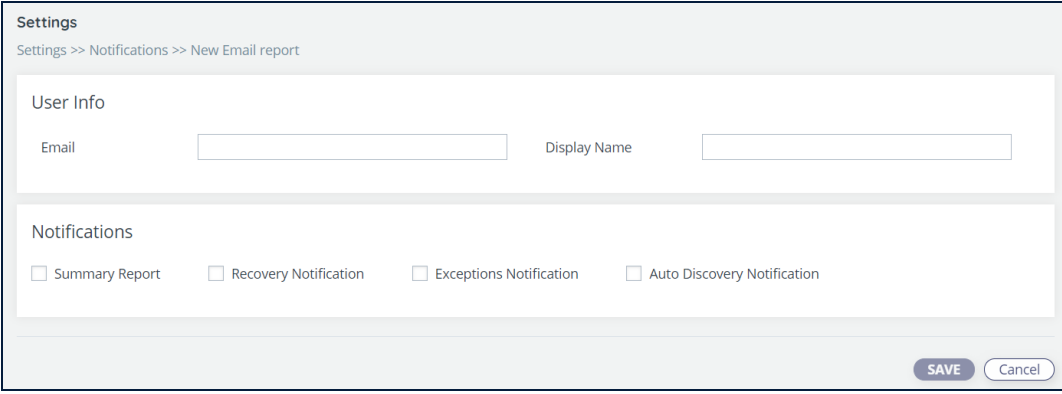
SAVE

Send Notifications To: + Add new recipient

Email	Display Name	Summary Report	Recovery Notification	Exceptions Notification	Auto Discovery Notification	Action
testally@cloudrein.com	testally@mail.ru	✓	✓			✎

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.
4. Click **SAVE**.



The screenshot shows a web form titled "Settings" with a breadcrumb trail "Settings >> Notifications >> New Email report". The form is divided into two main sections: "User Info" and "Notifications".

User Info

Email Display Name

Notifications

☐ Summary Report ☐ Recovery Notification ☐ Exceptions Notification ☐ Auto Discovery Notification

At the bottom right of the form are two buttons: "SAVE" (in a dark blue rounded rectangle) and "Cancel" (in a light gray rounded rectangle).

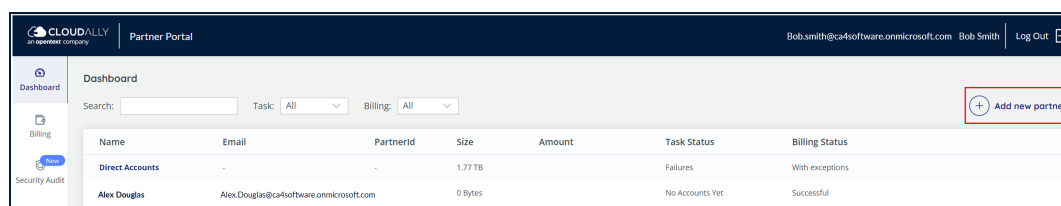
To edit an existing recipient's notifications settings, click on the icon to the right of the recipient you wish to edit.

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

Account Status ▾

Backup Status ▾

Billing Status ▾

Subscribe ▾

6.4 Activating Backups for New Direct Accounts

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

To activate backups:

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

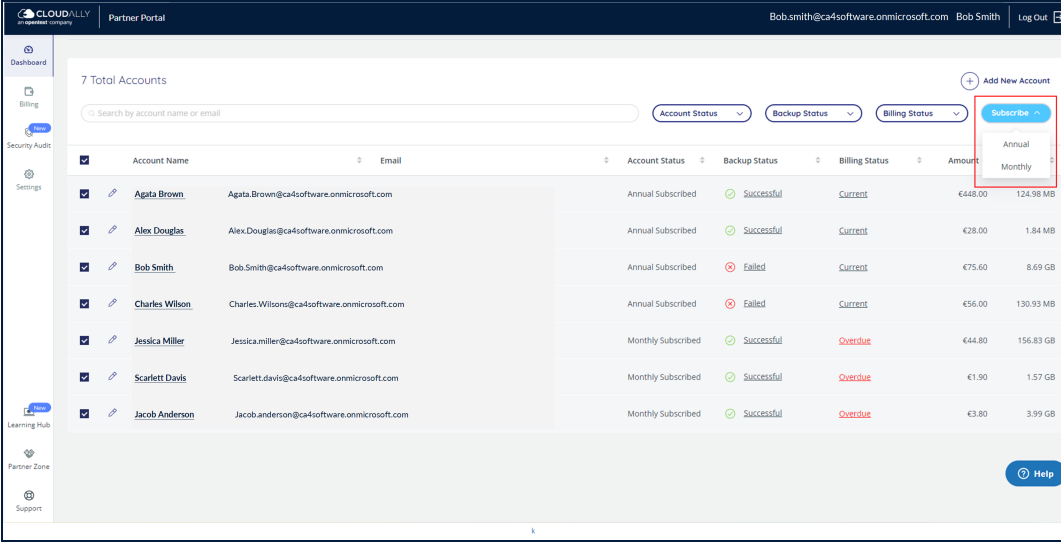
6.5 Subscribing a Trial Account

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

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

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

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



7 Total Accounts

Search by account name or email

Account Status Backup Status Billing Status

Subscribe

Account Name	Email	Account Status	Backup Status	Billing Status	Amount	Subscription Type
Agata Brown	Agata.Brown@ca4software.onmicrosoft.com	Annual Subscribed	Successful	Current	€448.00	124.98 MB
Alex Douglas	Alex.Douglas@ca4software.onmicrosoft.com	Annual Subscribed	Successful	Current	€28.00	1.84 MB
Bob Smith	Bob.Smith@ca4software.onmicrosoft.com	Annual Subscribed	Failed	Current	€75.60	8.69 GB
Charles Wilson	Charles.Wilson@ca4software.onmicrosoft.com	Annual Subscribed	Failed	Current	€56.00	130.93 MB
Jessica Miller	Jessica.miller@ca4software.onmicrosoft.com	Monthly Subscribed	Successful	Overdue	€44.80	156.83 GB
Scarlett Davis	Scarlett.davis@ca4software.onmicrosoft.com	Monthly Subscribed	Successful	Overdue	€1.90	1.57 GB
Jacob Anderson	Jacob.anderson@ca4software.onmicrosoft.com	Monthly Subscribed	Successful	Overdue	€3.80	3.99 GB

Help

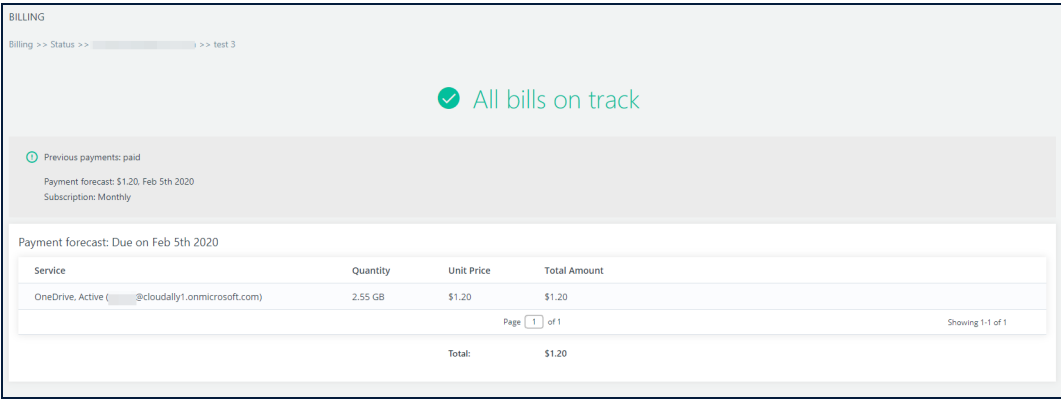
Only the trial accounts will be affected by this action. The accounts that are already subscribed with another type of subscription remain as they are.

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.



BILLING

Billing >> Status >> >> test 3

✓ All bills on track

Previous payments: paid

Payment forecast: \$1.20, Feb 5th 2020

Subscription: Monthly

Payment forecast: Due on Feb 5th 2020

Service	Quantity	Unit Price	Total Amount
OneDrive, Active (@cloudally1.onmicrosoft.com)	2.55 GB	\$1.20	\$1.20

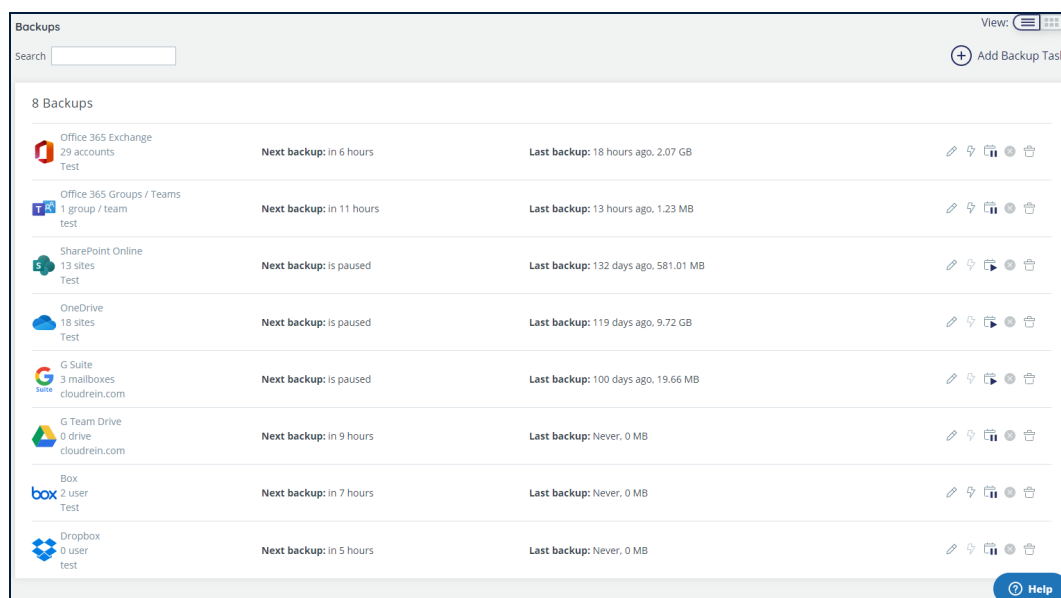
Page 1 of 1

Showing 1-1 of 1

Total: \$1.20

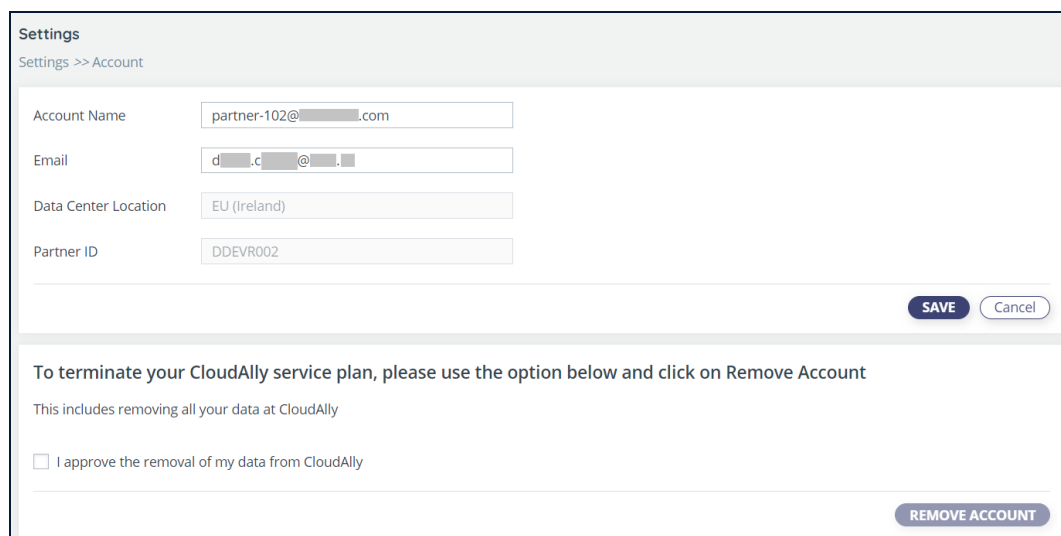
6.6.1 Canceling a User's Subscription

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



Backups			View: [icon]
Search [input]			[+] Add Backup Task
8 Backups			
Office 365 Exchange 29 accounts Test	Next backup: in 6 hours	Last backup: 18 hours ago, 2.07 GB	[edit] [refresh] [pause] [delete]
Office 365 Groups / Teams 1 group / team test	Next backup: in 11 hours	Last backup: 13 hours ago, 1.23 MB	[edit] [refresh] [pause] [delete]
SharePoint Online 13 sites Test	Next backup: is paused	Last backup: 132 days ago, 581.01 MB	[edit] [refresh] [pause] [delete]
OneDrive 18 sites Test	Next backup: is paused	Last backup: 119 days ago, 9.72 GB	[edit] [refresh] [pause] [delete]
G Suite 3 mailboxes cloudrein.com	Next backup: is paused	Last backup: 100 days ago, 19.66 MB	[edit] [refresh] [pause] [delete]
G Team Drive 0 drive cloudrein.com	Next backup: in 9 hours	Last backup: Never, 0 MB	[edit] [refresh] [pause] [delete]
Box 2 user Test	Next backup: in 7 hours	Last backup: Never, 0 MB	[edit] [refresh] [pause] [delete]
Dropbox 0 user test	Next backup: in 5 hours	Last backup: Never, 0 MB	[edit] [refresh] [pause] [delete]

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



Settings
Settings >> Account

Account Name:

Email:

Data Center Location:

Partner ID:

[SAVE] [Cancel]

To terminate your CloudAlly service plan, please use the option below and click on Remove Account

This includes removing all your data at CloudAlly

☐ I approve the removal of my data from CloudAlly

[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

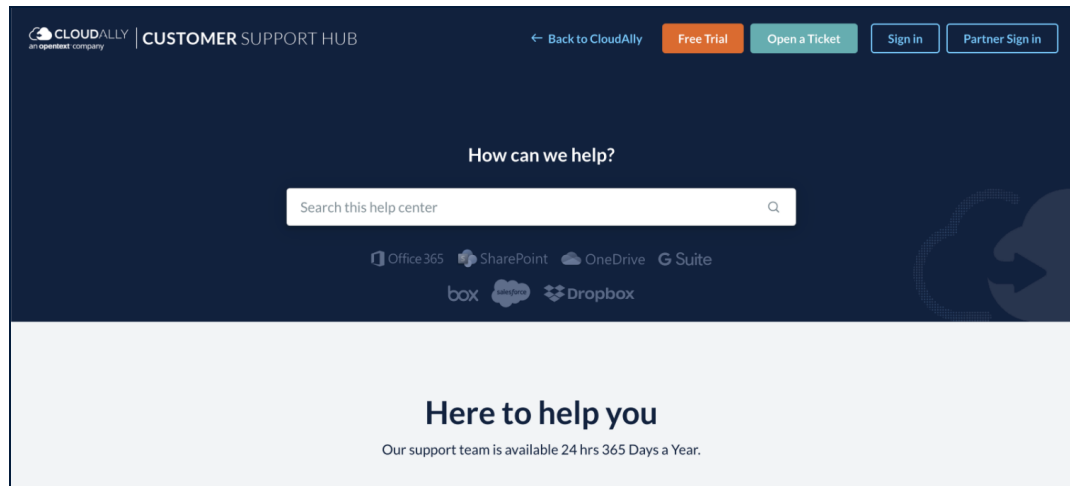
CloudAlly takes privacy seriously. Read our Privacy Policy at <https://www.cloudally.com/privacy-policy>

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.

Here to help you


Our support team is available 24 hrs 365 Days a Year.



Ticket

Open a new ticket or view your existing tickets


[Open a Ticket](#)



Call

Our agents are available to assist by telephone.


[Call Us](#)



Chat

Click to chat with our customer support agents.

[Chat With Us](#)




Email


Email us with your customer support inquiry.


[Email Us](#)


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.


Knowledge Base


**Getting Started**

**My Account**

**Backup Solutions**

**User Guides**

**Videos**

**Copyright & Legal**