



User Guide

# Box Backup & Recovery

The logo for Box, consisting of the word "box" in a blue, lowercase, sans-serif font.

Box UG 24.3.2

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# 1 Preface

## 1.1 About This Guide

Thank you for selecting CloudAlly for Box. Relax! All your Box data is now securely protected with easy recovery from data loss. CloudAlly comprehensively backs up your data on industry-leading AWS S3 storage. Our product's ethos is to provide feature-rich backup and recovery with security, ease of use, and flexibility woven in.

CloudAlly is cloud-native, a full cloud-to-cloud solution. No installation is required, the setup is hassle-free, backup is easy, and there are flexible recovery and export options. Read on for instructions about how to activate and manage your backups, restore your data by keyword, from any point-in-time, and at any granular/hierarchical level, export your backups to your own storage, activate summary/exception reporting, and set up MFA and other helpful features.

Questions or comments? Please contact us at [support@cloudally.com](mailto:support@cloudally.com) or search our Knowledge Base at <https://support.cloudally.com/hc/en-us>.

## 1.2 Audience

This guide is intended for individuals who administer CloudAlly for Box.

## 1.3 What's in This Guide

This guide is organized to help you find the information you need to manage CloudAlly for Box. It is divided into functional parts intended to support you as you manage your environment:

- [Creating and Accessing Your Backup Account](#)
- [Backing Up Your Data](#)
- [Recovering Your Backed Up Data](#)
- [Filtering and Viewing Drill-Down Details](#)
- [Managing Your Account](#)
- [Managing Subscriptions and Payments](#)

## 2 Creating and Accessing Your Backup Account

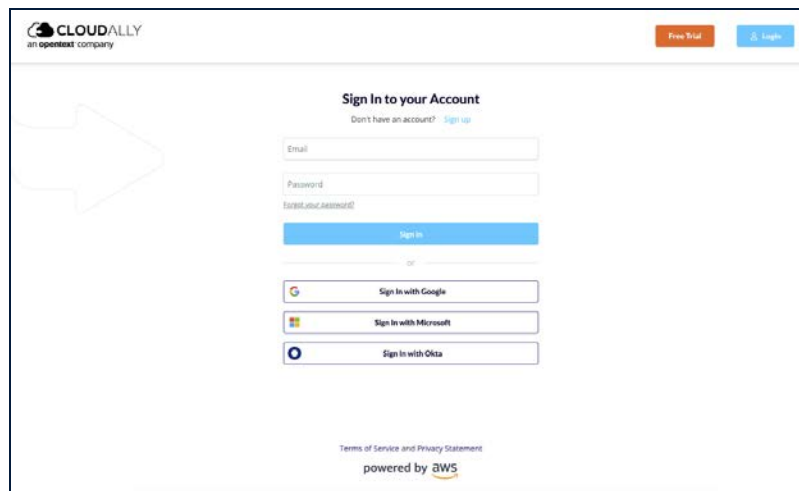
### 2.1 Prerequisites

To administer backups for the Box environment, the following is required:

- Box Business Plan

### 2.2 Sign Up/Sign In from the CloudAlly Home Page

1. In your Internet browser, open [cloudally.com](https://cloudally.com) and click **Login**.
2. Click **Customers**. The *Sign In* page is displayed.



3. If you don't have an account yet, click **Free Trial**. The *Sign Up* page is displayed.

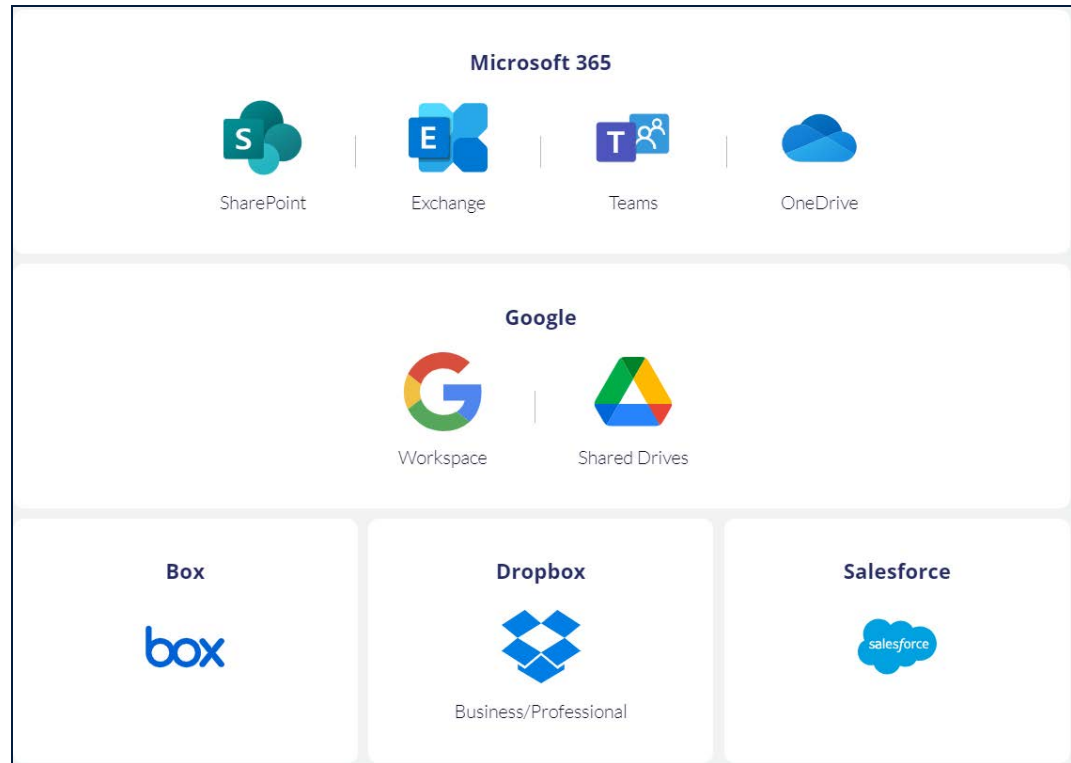
4. Complete the form, and then click Sign up.

**Note:** CloudAlly gives you the choice of numerous AWS data centers available in the dropdown menu “Location.” These include locations in Australia, Canada, EU (France, Germany, and Ireland), US, UK, South Africa, India, and Japan. The ability to choose from a wide range of data centers helps our customers comply with local data sovereignty laws that regulate the physical location and movement of data. In addition, we also offer a “Bring Your Own Storage” (BYOS) option on request. This allows you to backup sensitive data in your own AWS S3 buckets, S3 compatible storage service, Azure, or Google Cloud Platform. Please contact [support@cloudally.com](mailto:support@cloudally.com) for more information.

5. Your trial account is created, and an email containing your activation link is sent to your email address. Click on the activation link contained in the email you received to activate your account. If you sign up with Google, Azure, or Okta, the activation link will not be sent to you.
6. Once your account is activated, you are redirected to the CloudAlly *login* page. Enter your email address/password and click **Sign In** to login and access your account.

**Note:** You can also enable Two-Factor authentication to provide additional security. For more information, see [Managing Your Account](#) .

7. After you log in, you will see the following screen, enabling you to begin creating your backup tasks:



## 2.3 Resetting Your Password

If you do not remember your password, you can easily reset it using the **Password Reset** function.

1. On the sign-in page, click **Forgot your password?** to start the process of resetting your password.

**Sign In to your Account**  
Don't have an account? [Sign up](#)

bob.smith@ca4software.onmicrosoft.com

Password

[Forgot your password?](#)

Sign In

or

Sign In with Google

Sign In with Microsoft

Sign In with Okta

2. The *Password Reset* page will appear.

**Password Reset**

To reset your password, enter  
the Email address you signed up with

Email

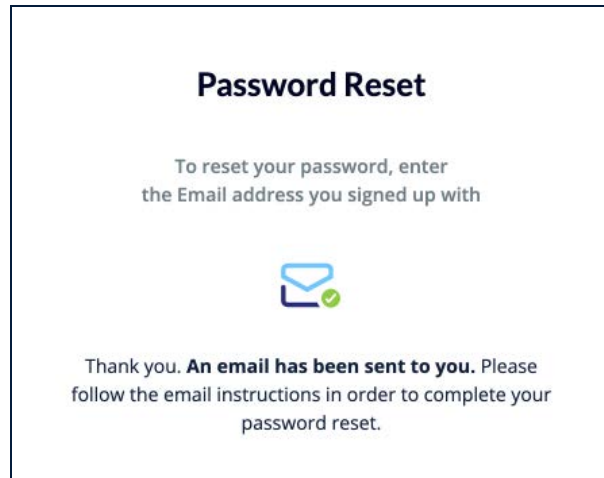
Reset

[Sign in](#) [Sign up](#)

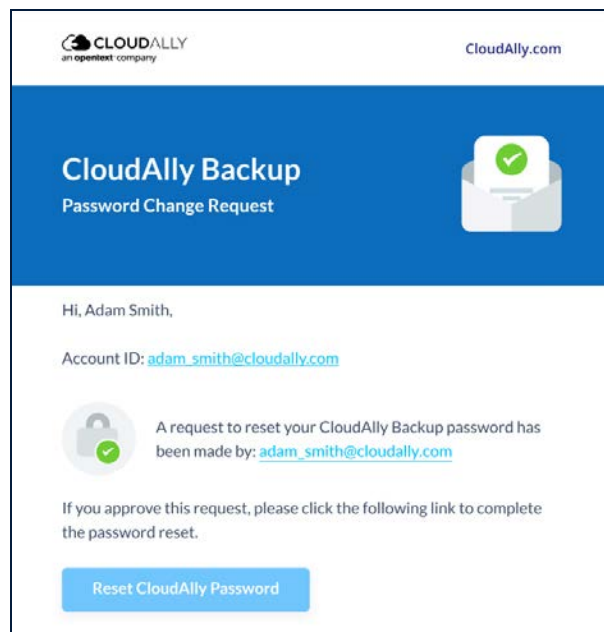
3. In the Email field, enter the email address that you used to sign up.

4. Click **Reset**, and the *Password Reset* window will appear.

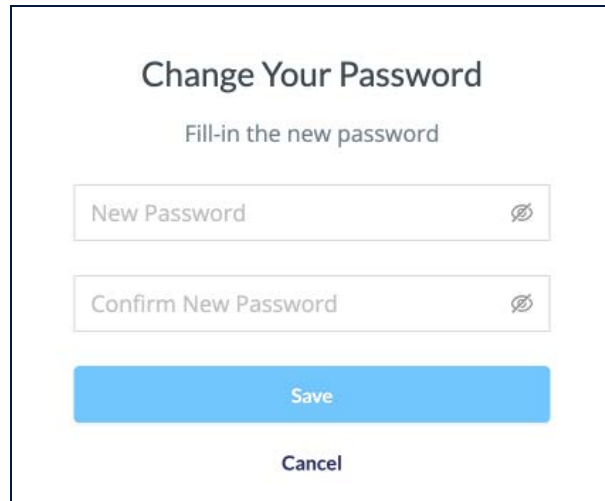




The email will look as follows:



5. In the email, click **Reset CloudAlly Password** to confirm the password reset, and the *Change Your Password* window will appear.



The screenshot shows a 'Change Your Password' form. At the top, it says 'Change Your Password' in bold. Below that is the instruction 'Fill-in the new password'. There are two input fields: 'New Password' and 'Confirm New Password', both with a small icon on the right side. Below the input fields is a blue button labeled 'Save'. At the bottom of the form is a 'Cancel' link.

6. Enter your new password in the **New Password** field and again in the **Confirm New Password** field, and click **Save**.

After resetting the password, you will be directed back to the *Sign In to your Account*.

## 3 Backing Up Your Box Data

Box lacks the daily backup and archiving process necessary for you to restore data after it has been manually or automatically removed from the recycle bin. CloudAlly's automated daily backup of your Box data ensures that you can both quickly recover data from any point in time as well as export your archives for local storage.

With a few simple clicks, you can activate backups for all or selected users.

### 3.1 Supported Versions

CloudAlly supports backup and recovery of the following Box versions:

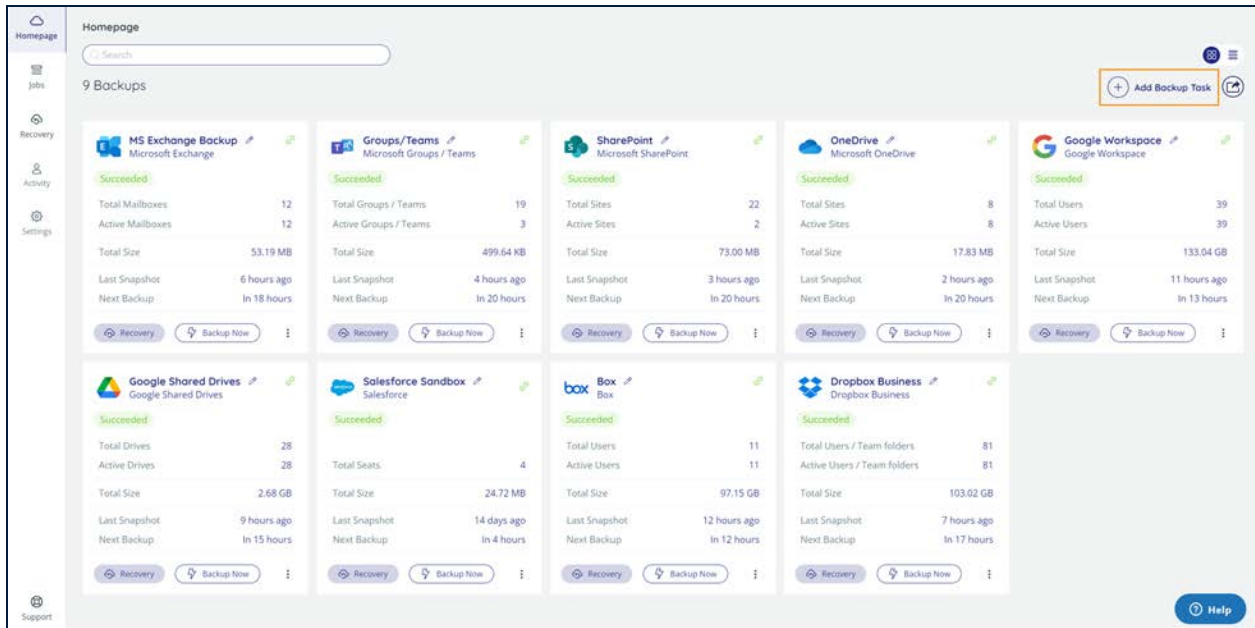
- Business
- Business Plus
- Enterprise
- Enterprise Plus

**Note:** Box personal versions are not supported.

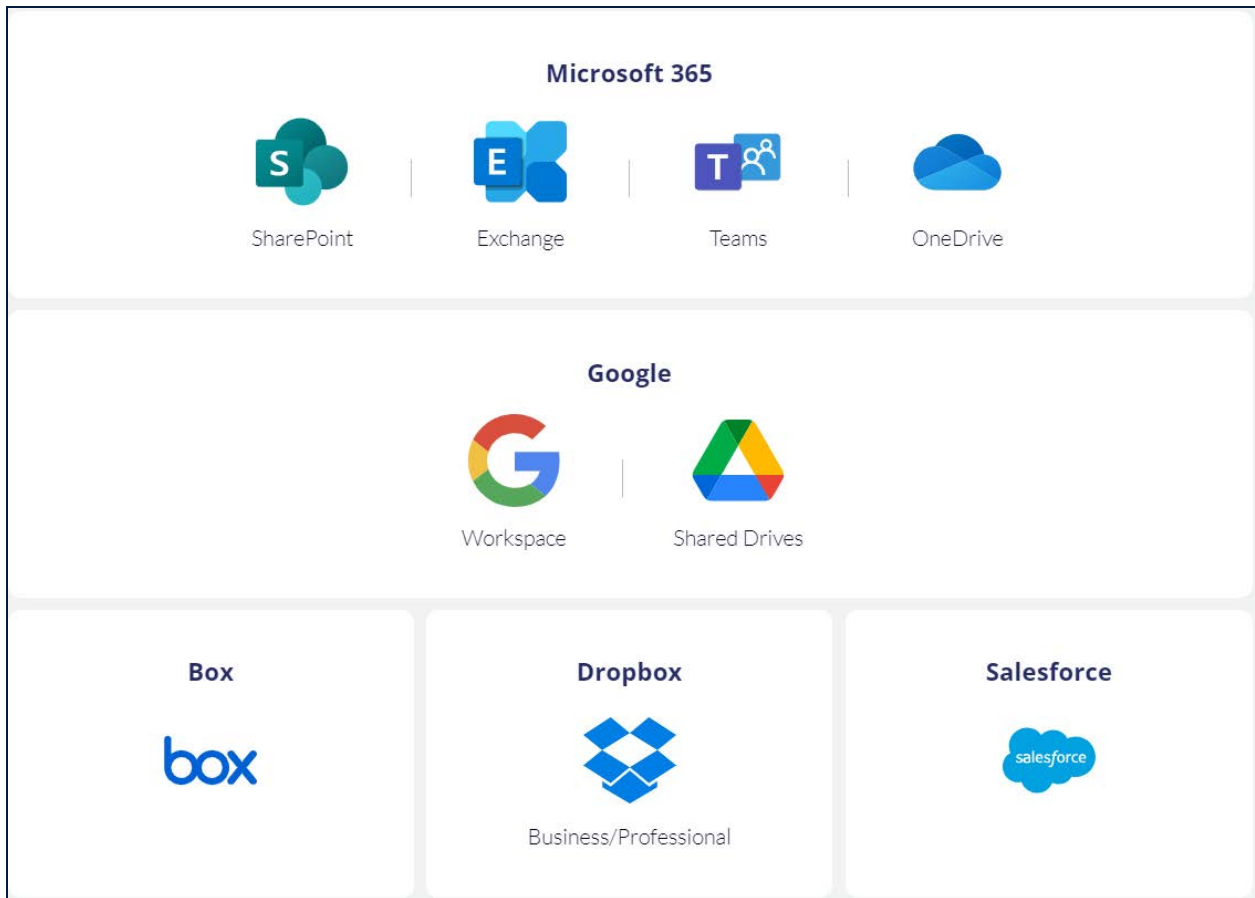
### 3.2 Creating a New Backup Task

To create a new backup task:

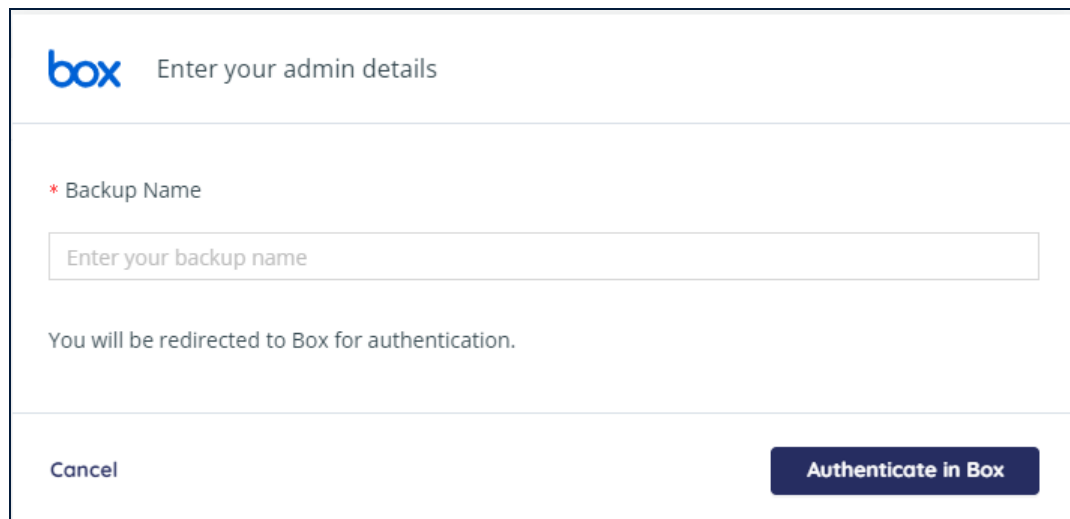
1. Sign in to your account, or if you are already signed in, click the **Homepage** option in the Navigation Panel.
2. On the Homepage, click + **Add Backup Task**.



The following page is displayed:

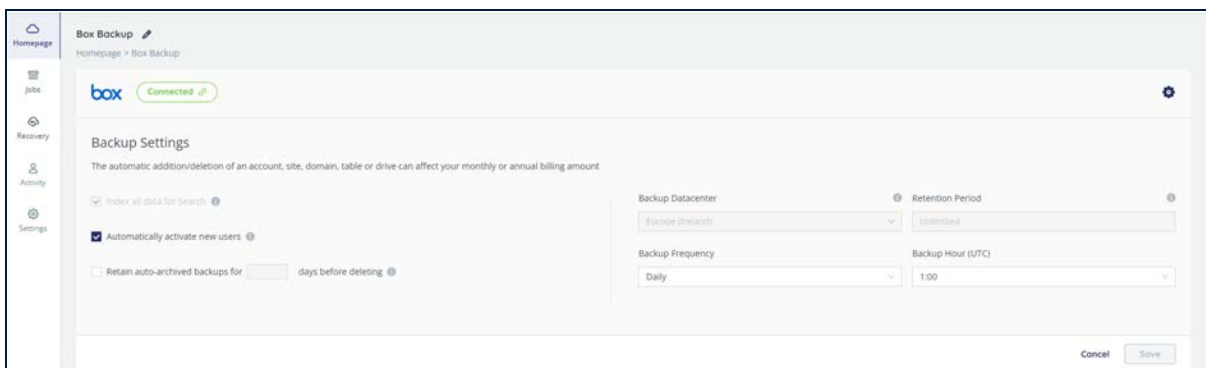


3. Click **Box**. The following screen appears.



The screenshot shows a web form titled "Enter your admin details" with the Box logo. It features a required text input field labeled "\* Backup Name" with the placeholder text "Enter your backup name". Below the input field, a message states "You will be redirected to Box for authentication." At the bottom of the form, there are two buttons: "Cancel" on the left and "Authenticate in Box" on the right.

4. Fill in the name of the backup task. This name is used in the notifications and reports, and it can be changed later.
5. Click **Authenticate in Box**. You will be directed to the *Box login* page, where you need to add your user name and password. Click **Authorize**.
6. You will be redirected to the *Backup Settings* page, where you can adjust the settings of the backup.

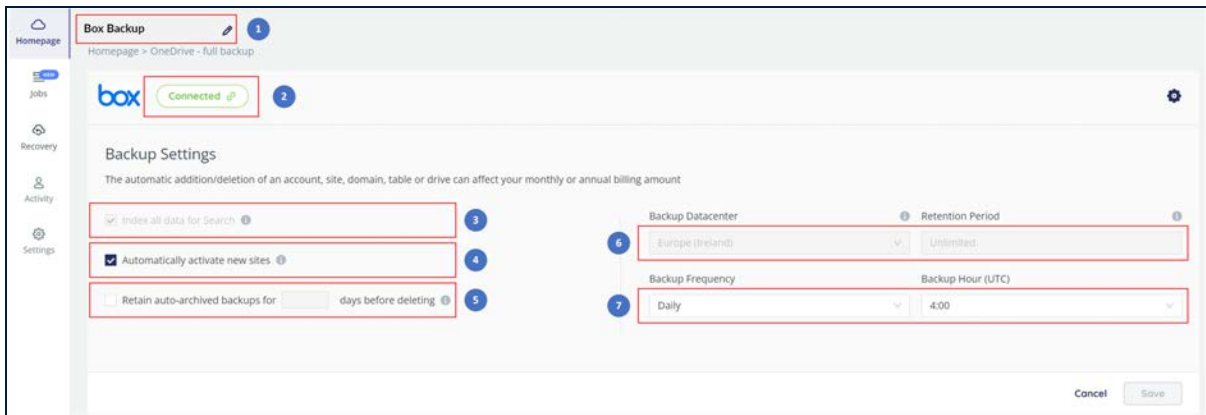


The screenshot displays the "Backup Settings" page. On the left is a navigation sidebar with icons for Homepage, Jobs, Recovery, Activity, and Settings. The main content area shows a "Connected" status for Box. Below this, there are several settings sections: "Index all data for Search" (checked), "Automatically activate new users" (checked), and "Retain auto-archived backups for" (with a dropdown menu). On the right side, there are two columns of settings: "Backup Datacenter" (set to Europe (Ireland)), "Retention Period" (set to Unlimited), "Backup Frequency" (set to Daily), and "Backup Hour (UTC)" (set to 1:00). At the bottom right, there are "Cancel" and "Save" buttons.

On this page, you can adjust the backup settings and activate backups for the Box users. See the sections below for the detailed procedures.

### 3.3 Configuring Backup Settings

To access the configuration screen, click the gear-shaped settings icon.



1. You can change the name of the backup task by clicking the pencil icon.
2. The icon next to the Box logo displays whether the application was able to connect to the specified Box account. If the authentication token granted for the application becomes invalid (e.g., it expires due to inactivity because you put the backup task on pause for a long time), the Connected icon changes to Disconnected. To grant the application a new token, click on the icon to open the authentication dialog, and repeat the authentication process.
3. By default, the “Index all data for Search” option is selected, which enables CloudAlly to provide you with its granular search and restore functionality. In the process, your data is temporarily decrypted for a brief period of time, and then re-encrypted once the index is built. If this goes against your company policy and you would like to disable automatic indexing, please contact [support@cloudally.com](mailto:support@cloudally.com).
4. The Automatically activate new users option instructs the system to detect new users, and activate them automatically.
5. Backups are automatically archived when an entire site is deleted. The **Retain auto-archived backups** option allows you to retain them for a specified number of days, after which they will be deleted. Otherwise, the backups will be retained indefinitely.

**Note:** The **Backup Data Center** and **Retention Period** fields are “display only,” and their values can’t be changed here.

6. The **Backup Data Center** field displays the Data Center location you selected when you signed up with your registration.

The **Retention Period** field displays whether a retention period has been set up. By default, we provide unlimited retention of your daily backups for as long as you maintain your account subscription. You can override this default and specify a retention period in days, months, or years by contacting CloudAlly support. Backups older than the retention period specified will be automatically deleted.

**Note:** Your backup storage location cannot be changed once it's been set during the account setup process. Contact CloudAlly support if you need to move backups to a different geographic region, or if you'd like more information on our "Bring Your Own Storage" (BYOS) option.

## 7. Backup Frequency and Backup Hour

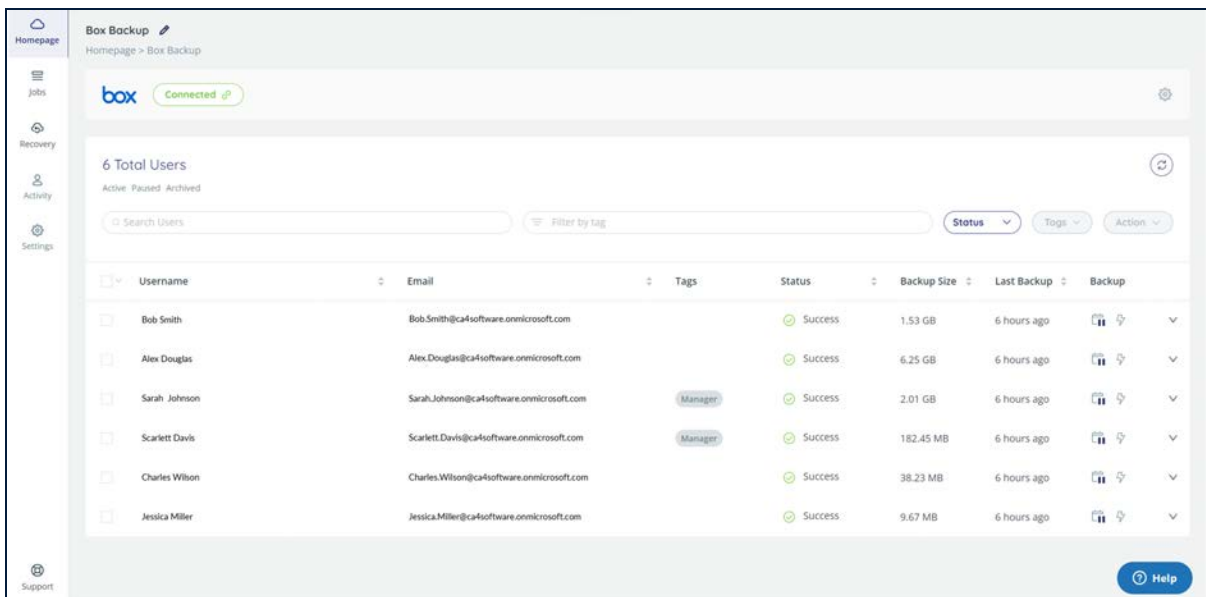
- a. Click the drop-down list adjacent to the **Backup Frequency** field and select how often you would like the backups to occur. The available options include:
  - i. Daily
  - ii. Every 3 days
  - iii. Weekly
  - iv. 3 times a day
- b. Click the drop-down list adjacent to the **Backup Hour (UTC)** field and select the backup hour. Click **Save**.

**Note:** 3x daily backups might be subject to additional charges. Please contact CloudAlly support or your sales representative if you have any questions before changing the backup frequency.

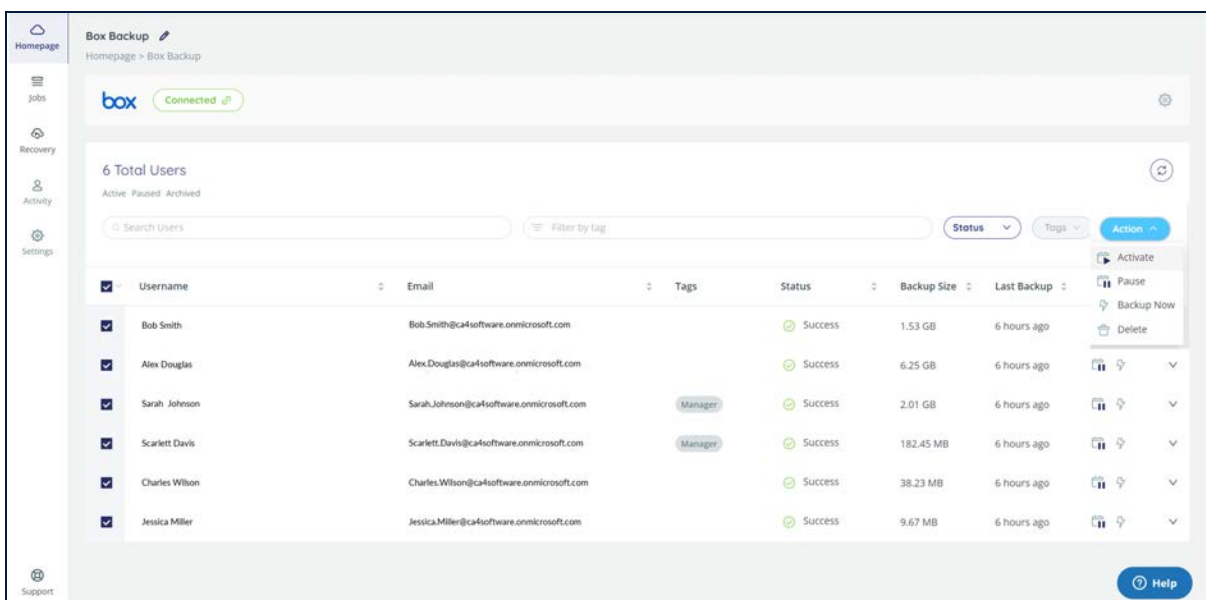
## 3.4 Activating Your Backups

Once you have configured your backup settings, you need to **Activate** them, in order for them to begin backing up your data.

1. Scroll down to the list of users.



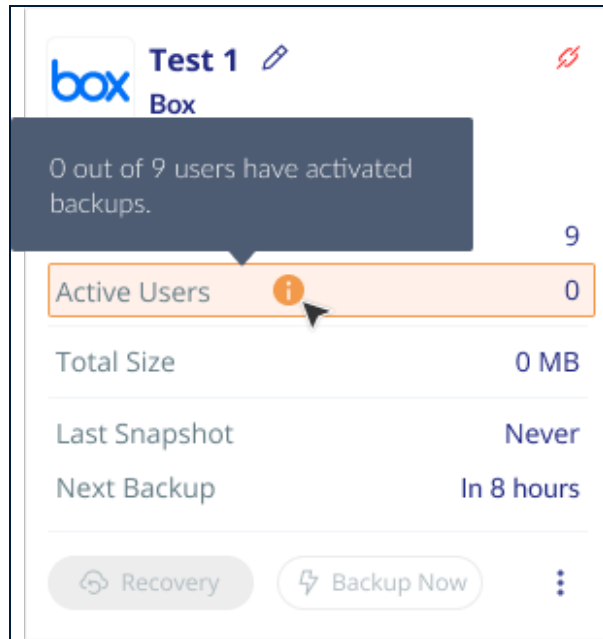
2. Select one or more user(s).
3. Click **Action** > **Activate**. The status of your backups will now be "Scheduled." This means that they will be backed up at the time that you selected on the Configuration screen.





- Alternatively, if you prefer to perform an immediate, on-demand backup, click **Action > Backup Now**.

If you forget to activate any of your backups, there will be an indicator on the Homepage that reminds you:

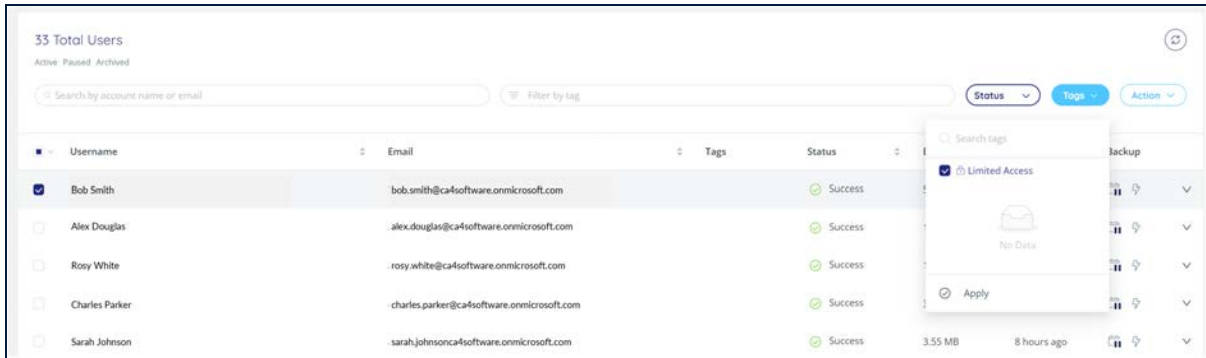


### 3.5 Securing Your Backups

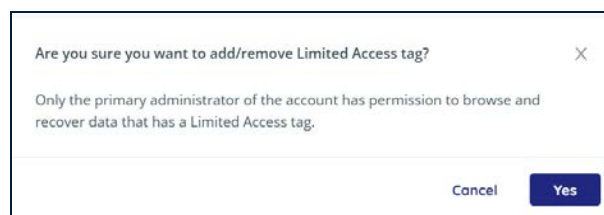
By default, all primary and secondary users can preview, browse, and recover any backed up data. This could be a security risk if sensitive information is contained in the backup snapshots.

Primary users can limit access to one or more sites, drives, accounts, or users so that only they will be able to see, restore and export this data.

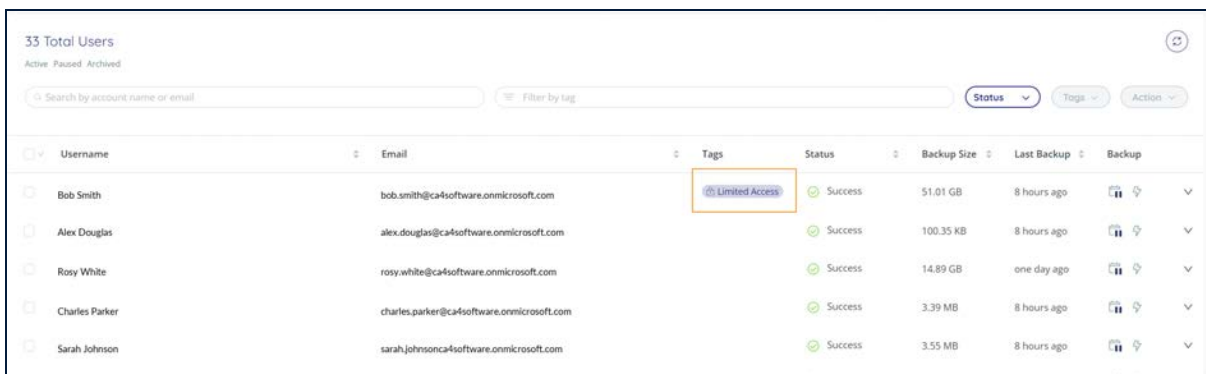
- Primary user: From the *Homepage*, click the name of the service whose data you would like to restrict.
- Click one or more users.
- Click **Tags**, and check the **Limited Access** tag.



4. Click **Apply**. You will be asked to confirm:



5. The tag will now appear in the **Tags** column as follows.



This will prevent secondary users from browsing and recovering the data.

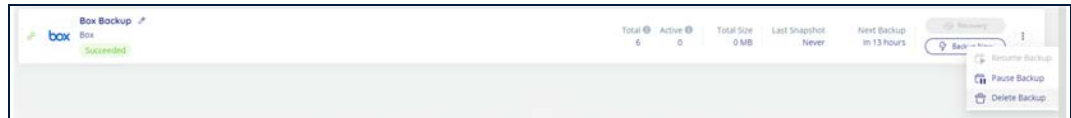
To remove the tag, the primary user should simply reverse the process - un-check the Limited Access tag, and re-apply.

### 3.6 Deleting a Backup

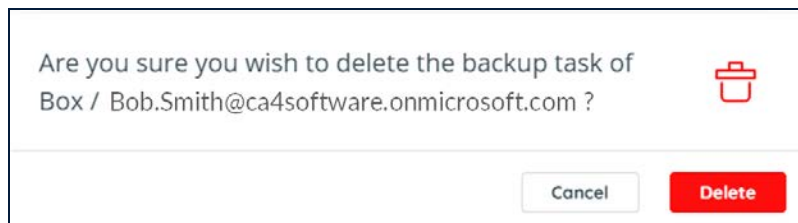
You can delete individual user backups or the entire backup service from your account if you do not want to use them further. The following sections guide you through the process of removing backup services and individual user backups.

### 3.6.1 Deleting a Backup Task

To remove a backup task for a service, on the *Homepage*, click Menu > **Delete Backup** adjacent to the backup task you want to remove.



The **Confirm Delete** pop-up window is displayed with a warning message.



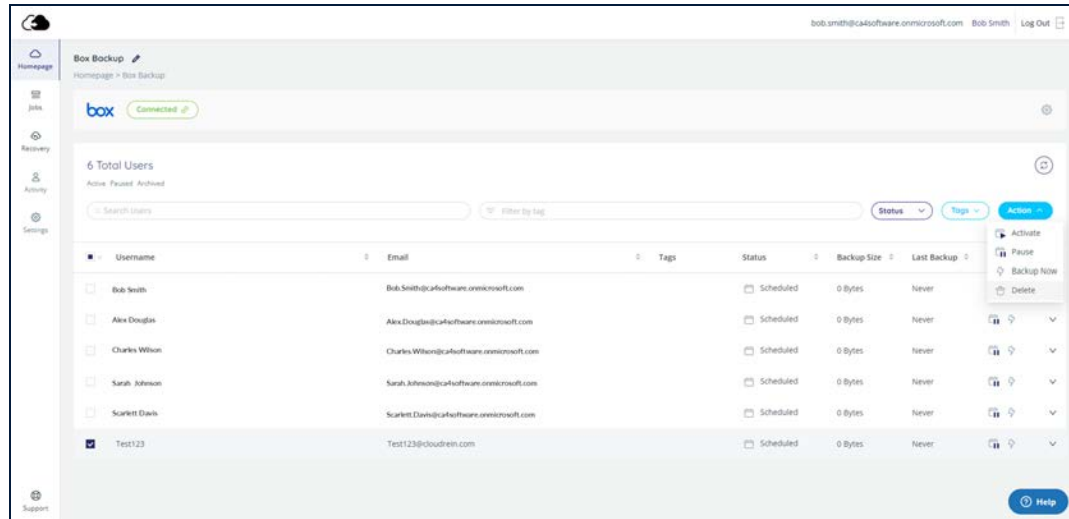
Click **Delete**. The selected backup service is removed from your account.

To prevent mistaken deletions, there is a grace period of 7 days after your backup is deleted.

### 3.6.2 Deleting an Individual user

To delete an individual user:

1. Click the backup task from which you want to delete the user. The backup task settings page is displayed.
2. Add a check next to the user that you want to delete. Click **Delete** in the **Actions** menu.



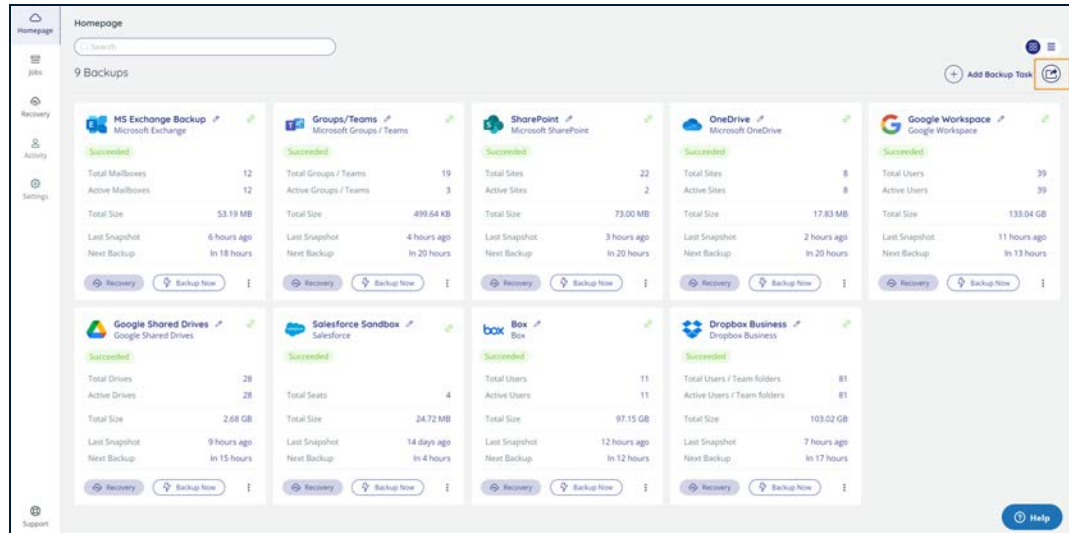
3. A pop-up window is displayed with a list of users selected for removal. Click **Delete**. The selected users are removed from your account.

To prevent mistaken deletions, there is a grace period of 7 days after your backup is deleted.

### 3.7 Usage Reports

In order to provide greater clarity to you about which users CloudAlly is backing up, you can export a CSV file that lists all of the entities that were backed up, including the status of each entity (active, inactive, or archived).

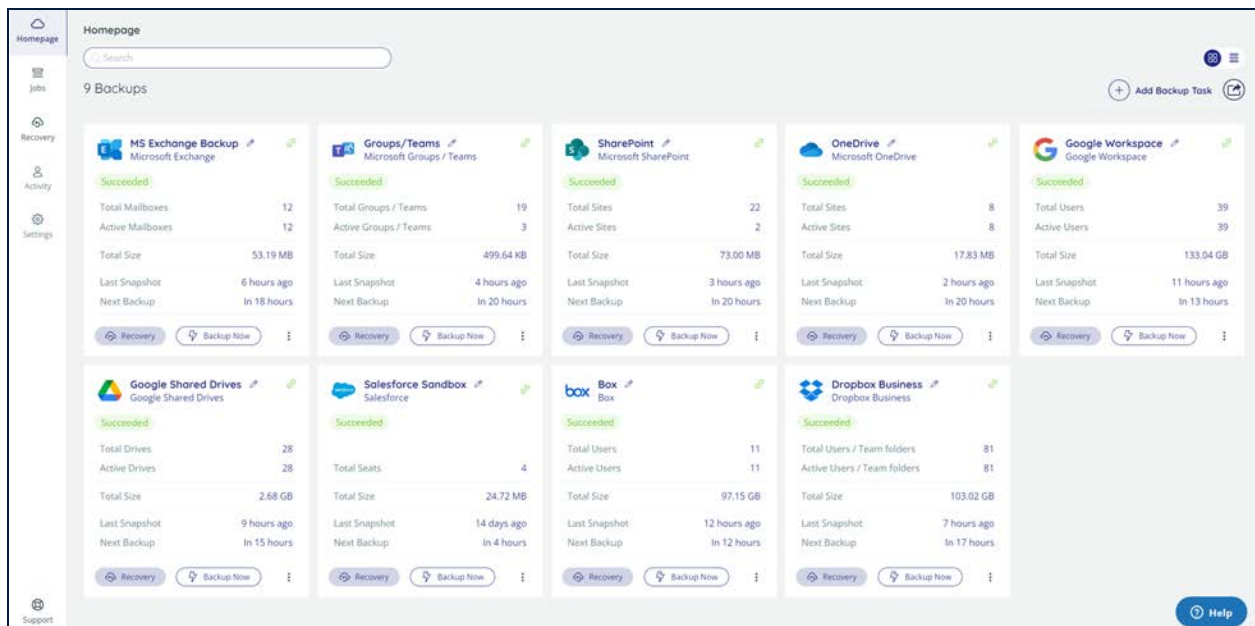
To export a usage report, click the **Export** button, next to **Add Backup Task**. The report will be sent to you via email.



### 3.8 Modifying the Settings of an Existing Backup

To modify an existing backup task:

1. Click the *Homepage* option from the Navigation Panel. The *Homepage* screen appears.



2. Click the Box icon from the list or enter a keyword in the Search field to find a specific task. The *Box Backup* page is displayed.
3. Click **Settings** on the top-right section of the screen to see the backup settings.

From here, it is possible to modify the fields described in [Configuring Backup Settings](#).

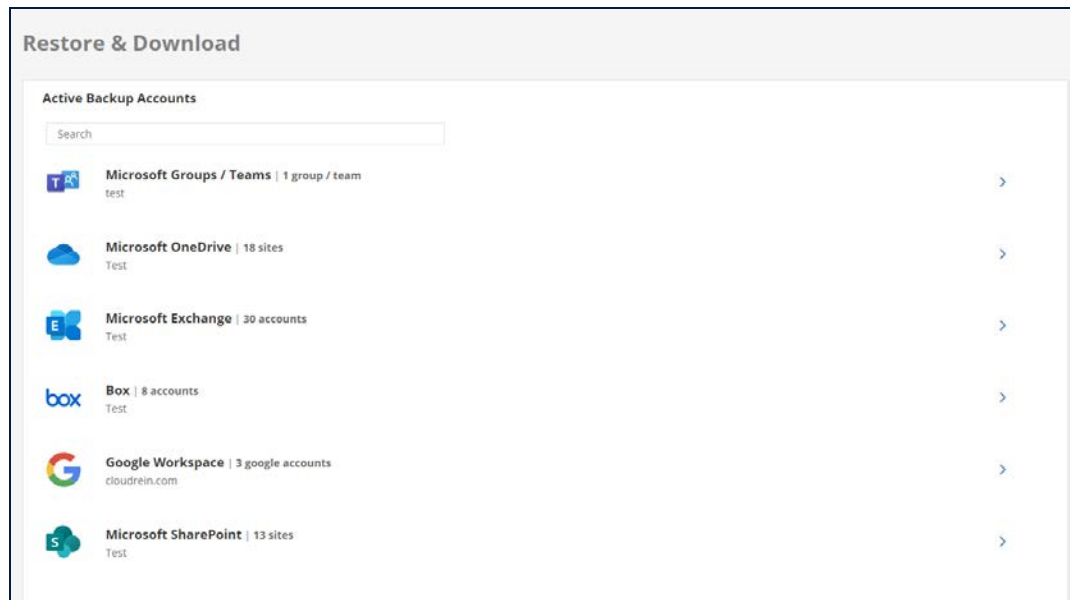
## 4 Recovering Your Backed Up Data

### 4.1 Using the Recovery Menu

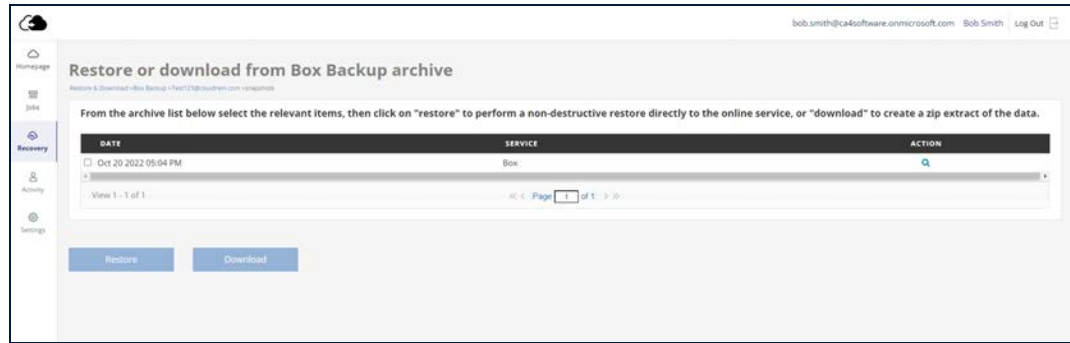
The Recovery Menu provides you with options at a fine granularity for selecting which user to restore or export.

To recover your backed up data:

1. Click Recovery from the Navigation Panel. The *Restore & Download* page is displayed with all your active-backup account details.



2. Click the Box backup task from which you wish to recover the data.
3. The *Restore or Download Box* page is displayed.

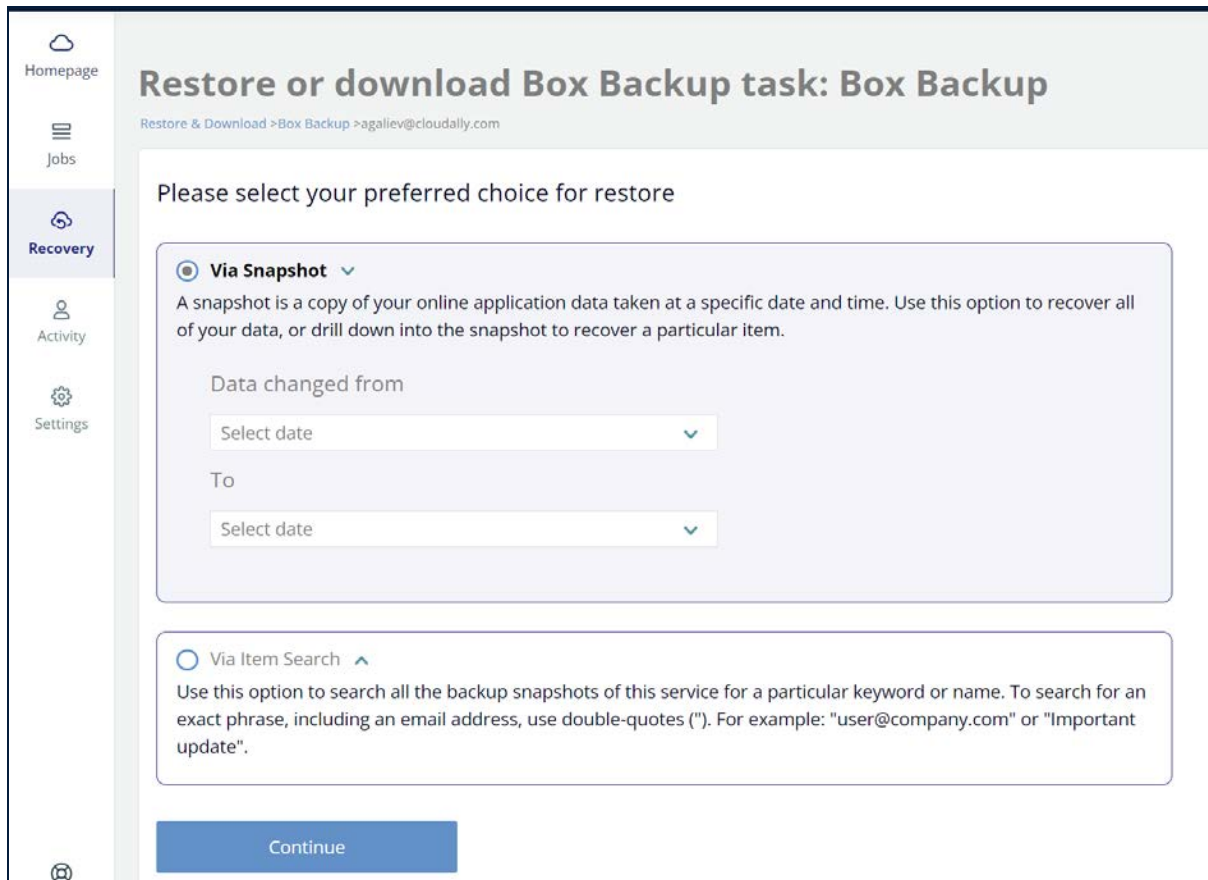


This page displays all your Box domains backed up with the details such as user name, First Backup date, Last Backup date, and available Actions. Your backed-up data is ready for download, from this page.

- You can filter the list using the following options:
  - Filter by statuses such as All, Active, In Process, Not Active, Scheduled, Paused, Backed-up in another task, or Archived, from the drop-down list.
  - Or: search by part or all of the user name.
- Click the arrow icon at the end of the line of the user which you want to restore or export (download).

The *Restore or download Box* page is displayed.

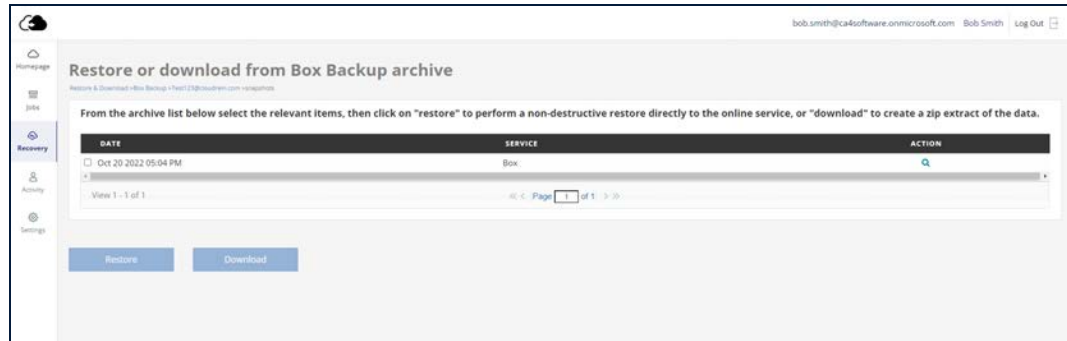




- Select the radio button for your preferred restore method:
  - Via Snapshot (see [Via Snapshot](#))
  - Via Item Search (see [Via Item Search](#))

#### 4.1.1 Restore or Download Via Snapshot

1. Enter the date range that you would like to restore using the *Data changed from* and *To* fields, and press **Continue**.
2. The list of backup snapshots within that date range is displayed. Select the snapshot you want to recover.



3. Alternatively, you can click the magnifying glass in the Action column to drill down into the snapshot and view the structure of the backed up data. There you can select one or more items for recovery.
4. Once you select a snapshot (if you wish to recover all the data in the backup), or one or more items (if you wish to recover only selected items), the **Restore** and **Download** buttons become available.

#### 4.1.1.1 Restore

If you click **Restore**, the restore confirmation window appears, asking you about the following:

- Do you want to restore to another folder or account? If so, provide the new location information.
- Do you want to perform a non-destructive backup, where the restored files are added to a new folder? The folder name indicates that they have been restored.
- Or do you want to perform an in-place restore? There are two options:
  - **Replace:** The restored content will be located in the same folder as the existing content, not in a separate folder that is created when you choose non-destructive restore. Deleted items and folders will be restored from the snapshot. Existing items will be overwritten with the snapshot version.  
**Use this option:** to restore or repair deleted / modified items
  - **Bypass:** The restored content will be located in the same folder as the existing content. Deleted items and folders will be restored from the snapshot. Existing items will be skipped.  
**Use this option:** to restore deleted data.

**Please confirm the restore request** ✕

You are about to restore items from the archive of  
**Bob.smith@CA4software.onmicrosoft.com**

Restore to

\*You can restore the data to a different account.

**Please select your restore method:**

Non-destructive: Data will be restored to a folder.

**In-place restore to the live site is also available, please select how you want to handle existing data:**

Replace: Restore will overwrite existing live data.  
 Bypass: Existing data will be bypassed and not restored.

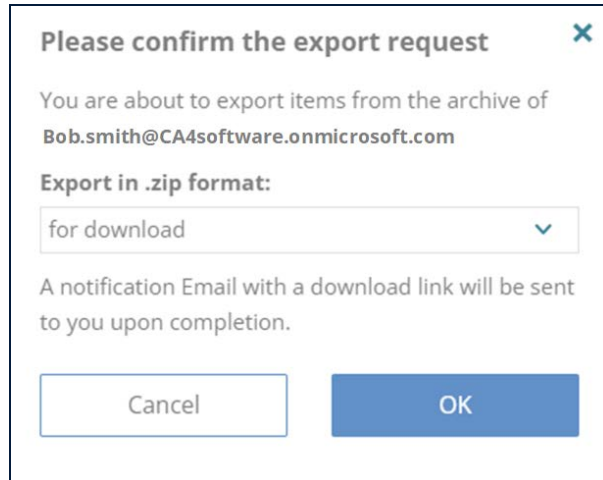
A confirmation Email will be sent to you upon completion.

The backup data that you selected will be restored to the location that you specified. When the recovery process is complete, a summary will be sent to your email.

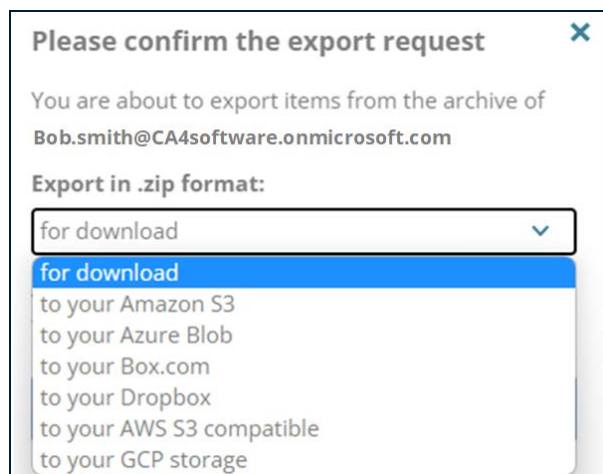
You can also check the Jobs page to see the progress of your task. See ["Tracking Recovery Tasks on the Jobs Page."](#)

#### 4.1.1.2 Export/Download

1. If you click **Download**, the following confirmation window appears.



2. Click the drop-down list and select one of the following storage locations:



3. If you select options other than “for download,” you may be asked for additional credentials and/or access tokens for the selected storage locations.
4. Click **OK**. The download instructions are sent to your registered email address. The download link is only valid for 72 hours.
5. Or, you can check the *Jobs* page. (See ["Tracking Recovery Tasks on the Jobs Page."](#)) When the task is completed, the **Download Results** button will be active.

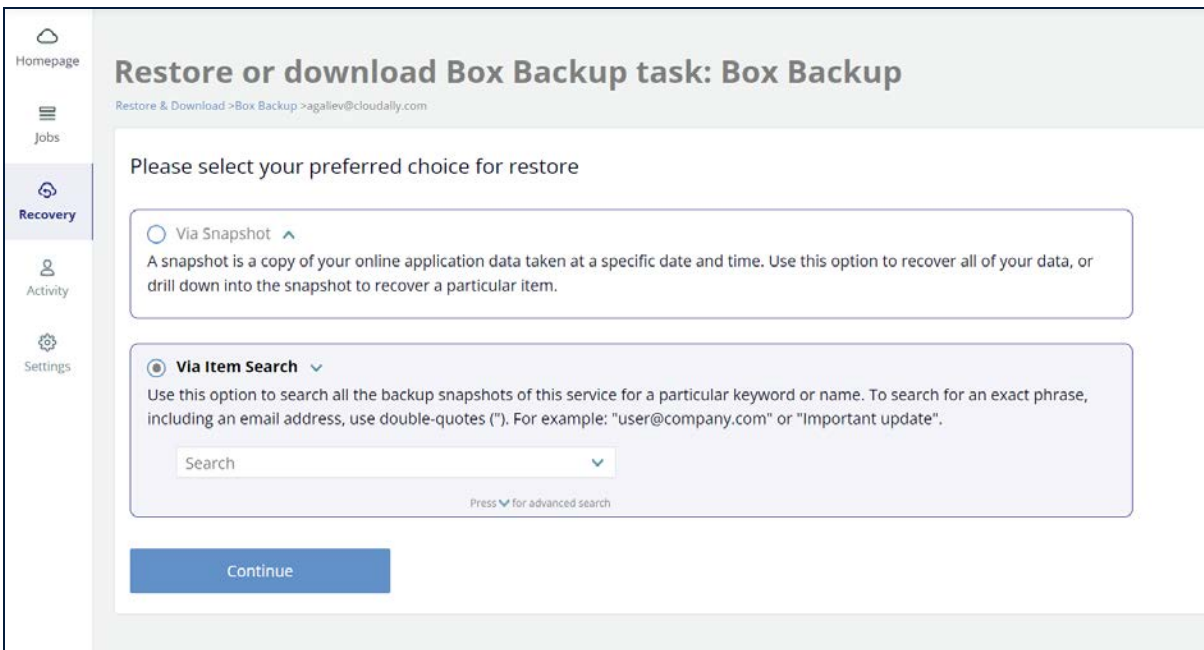


6. Click **Download Results**, and a page will open, where you can access your backup file.



### 4.1.2 Restore or Download Via Item Search

1. Select **Via Item Search**, and enter a word or phrase to search on.
2. Or, click the arrow next to the search bar, and enter search criterion in any of the Advanced fields: Author, file name or date.



3. Click **Continue**. The *Restore or download* page is displayed, showing the search results with details such as Type, Name and Date. The details columns are different for different types of restored items.

4. Select items you would like to restore or download. When at least one item is selected, **Restore** and **Download** become available.
5. Follow the instructions in the [Restore](#) or [Export/Download](#) sections to complete the recovery process.

## 4.2 Tracking Recovery Tasks on the Jobs Page

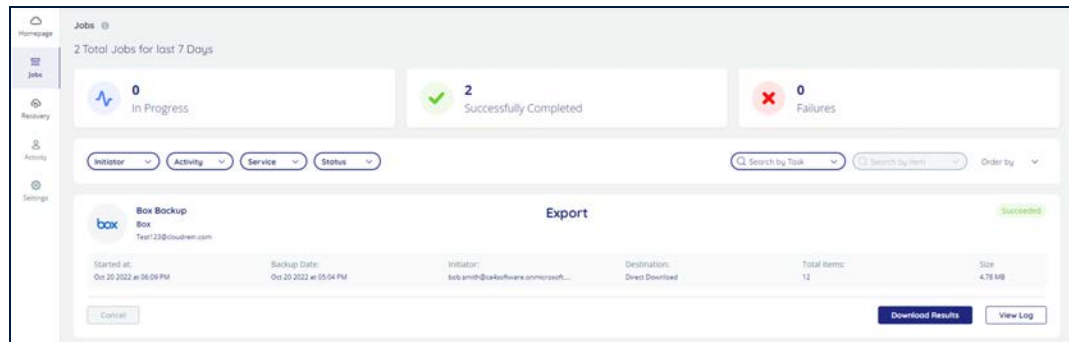
The Jobs page provides you with both high-level and drill-down views of your restore and export jobs over the last seven days.

**Note:** To see the status of your Backups, click the name of the backup from the *Homepage*.

From the Navigation pane, click **Jobs**.

### 4.2.1 High-Level Summary

- The top portion of the Jobs dashboard summarizes how many of your jobs are in progress, how many have successfully completed, and how many have partially succeeded or failed over the past 7 days.



To see a list of jobs that have any of these 3 statuses, click on the status, and your results will be filtered accordingly

## 4.2.2 Filtering

The next section allows you to filter by numerous criteria:

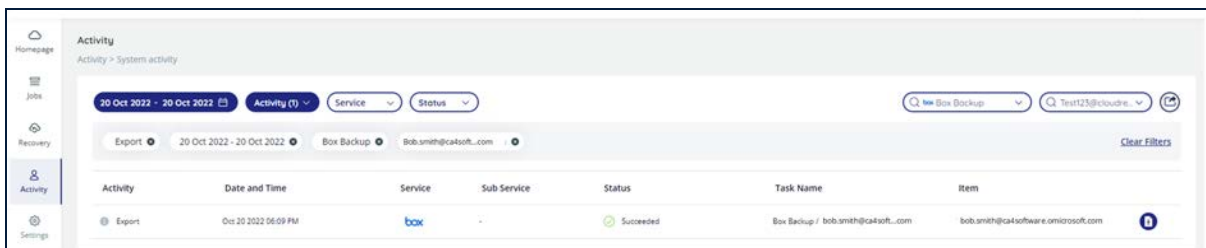
- **Initiator:** Who initiated the backup / restore?
- **Activity:** Filter by restores or exports.
- **Service:** Filter by one of the following services, such as:
  - Google Workspace
  - Google Shared Drives
  - Salesforce
  - Box
  - Dropbox
  - Google Account
- **Status:** Filter by one of the following:
  - In progress
  - Succeeded
  - Partially succeeded
  - Failed
  - Pending
  - Canceled
- **Search by Task:** Filter by a task, such as:
  - Box
  - Dropbox
  - Google Workspace
  - Salesforce

If you choose to filter using a particular service, then you can focus on a specific item in the search bar. You can also order by:

- Latest First
- Oldest First

### 4.2.3 Description of Each Job

- The rest of the screen provides a detailed description of each individual job that you ran.
  - **Type of Job:** Export, or Restore – this appears as a large title within each job description.
  - **Name, Service, and Account** of the job.
  - Start date, backup date, initiator, destination, total items backed up or restored, and the size of the file(s).
- **Cancel** enables you to stop a job that is in progress.
- **Download Results** enables you to download a zip file with your recovery data.
- **View Log** redirects you to the System Activity page, which displays your account activity with details such as Activity, Date and Time, Service, Sub-Service, Status, Task Name, and Item.



This page enables you to filter and search the list of backup tasks, export the list as a CSV file, and view more details on any backup task.

The latter can be achieved by clicking the information icon in the Activity column. The Info pop-up displays the backup execution time, the size of the stored data, and the number of entities, and the summary of the backup execution.



The screenshot shows a web interface for monitoring system activity. On the left is a navigation sidebar with icons for Homepage, Jobs, Recovery, Activity (selected), and Settings. The main content area is titled 'Activity' and 'System activity'. It features a filter bar with a date range '20 Oct 2022 - 20 Oct 2022', a dropdown for 'Activity (1)', and dropdowns for 'Service' and 'Status'. Below the filter bar is a toolbar with an 'Export' button, a date range '20 Oct 2022 - 20 Oct 2022', a 'Box Backup' button, and a user filter 'Bob.smith@ca4soft...com'. A table of activities is displayed with columns for 'Activity', 'Service', and 'Sub Service'. One activity is highlighted, and a tooltip shows its details: 'Export' with a green checkmark, 'Snapshot Date: Oct 20 2022 05:04 PM', 'Number of Records: 12', 'Export Destination: Direct Download', and 'Initiator: bob.smith@ca4software.onmicrosoft.com'. The table shows a 'box' service and an empty sub-service column.

Activity	Service	Sub Service
Export	box	-

## 5 Compliance

### 5.1 Delete Backed Up Data: GDPR's "Right to Be Forgotten" Option

The way to delete data items - emails and files - from a CloudAlly backup is to enable the GDPR (General Data Protection Regulation) "right to be forgotten" option.

To enable the ability to delete backed up items:

1. Request from CloudAlly support that they enable the GDPR delete button for you. They will ask you for the name of your account, and the service for which you would like to enable this.
2. From the Homepage, click **Recovery**.
3. Click the service that contains the item you would like to delete.

**Note:** It is not possible to delete an entire folder, only one or more items.

4. Click the arrow at the end of the row of the user that contains the item you would like to delete.

Restore or download Box active users

Restore & Download >Box Backup

Listed below are the users within your Box users ready for restore and download.

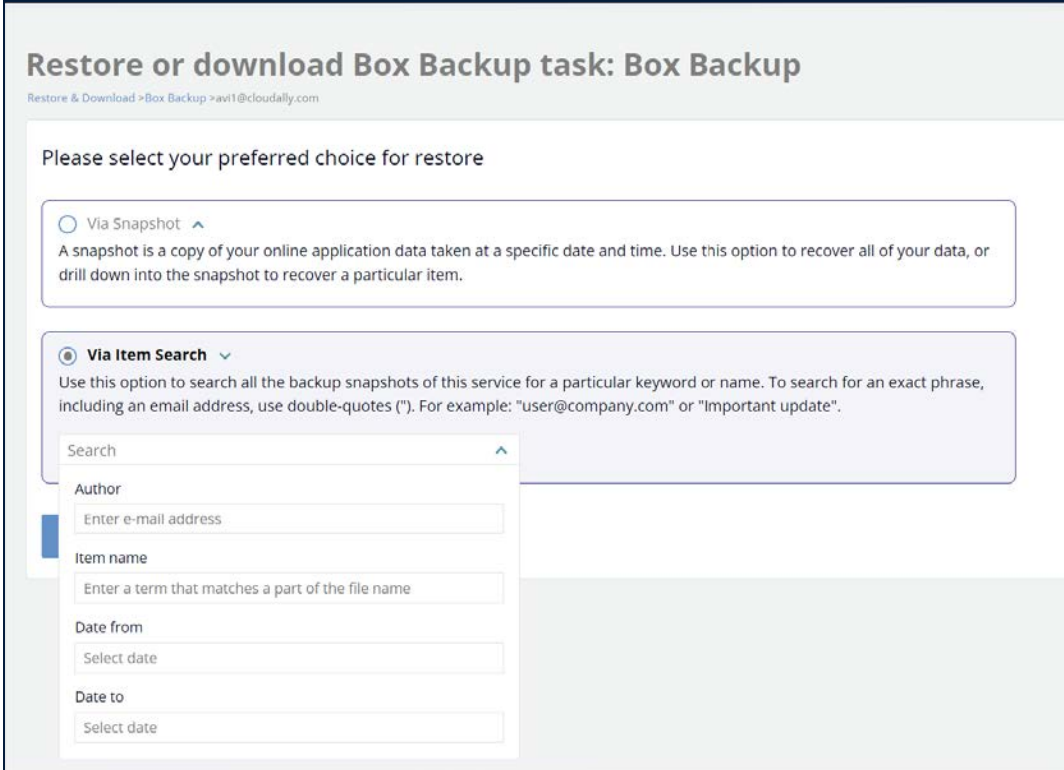
USER	FIRST BACKUP	LAST BACKUP	ACTION
Agata.brown@ca4software.onmicrosoft.com	215 days ago	10 hours ago	>
Alex.douglas@ca4software.onmicrosoft.com	215 days ago	10 hours ago	>
Bob.smith@ca4software.onmicrosoft.com	215 days ago	10 hours ago	>
Charles.wilson@ca4software.onmicrosoft.com	215 days ago	10 hours ago	>
Ida.taylor@ca4software.onmicrosoft.com	196 days ago	10 hours ago	>
Jessica.miller@ca4software.onmicrosoft.com	215 days ago	10 hours ago	>
Rosy.white@ca4software.onmicrosoft.com	215 days ago	10 hours ago	>

View 1 - 7 of 7

<< < Page 1 of 1 > >>

5. Click "Via Item Search" and enter the desired search criteria. For example, if you would like to delete all emails received from a specific person, type their email address. Or you can search by keyword.

**Note:** It is not possible to perform a GDPR delete using "Via Snapshot."



**Restore or download Box Backup task: Box Backup**  
Restore & Download > Box Backup > av1@cloudally.com

Please select your preferred choice for restore

Via Snapshot ^  
A snapshot is a copy of your online application data taken at a specific date and time. Use this option to recover all of your data, or drill down into the snapshot to recover a particular item.

Via Item Search v  
Use this option to search all the backup snapshots of this service for a particular keyword or name. To search for an exact phrase, including an email address, use double-quotes (""). For example: "user@company.com" or "Important update".

Search ^

**Author**  
Enter e-mail address

**Item name**  
Enter a term that matches a part of the file name

**Date from**  
Select date

**Date to**  
Select date

6. Select the item(s) you would like to delete, and click Delete.

Restore or download Documents from Bob.smith@ca4software.onmicrosoft.com

From the archive list below select the relevant items, then click on "restore" to perform a non-destructive restore directly to the online service, or "download" to create a zip extract of the data.

Search

NAME	FOLDER	AUTHOR	LAST MODIFIED
<input checked="" type="checkbox"/> Architectural design – draft 1	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 20, 2024
<input type="checkbox"/> Architectural design – draft 2	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 20, 2024
<input type="checkbox"/> Component spec – authentication	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 20, 2024
<input type="checkbox"/> Component spec – authorization	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 20, 2024
<input type="checkbox"/> Component spec – signature server	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 20, 2024
<input type="checkbox"/> Component spec – EMM	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 20, 2024
<input type="checkbox"/> Component spec – ECM	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 14, 2024
<input type="checkbox"/> Redundancy plan	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 14, 2024
<input type="checkbox"/> Site map	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 11, 2024
<input type="checkbox"/> Site map – detailed view	/Technical Specifications	Bob.smith@ca4software.onmicrosoft.com	Mar 11, 2024

View 1 - 50 of 470. << Page 1 of 10 >>

Restore Download Delete

**Note:** Ensure that the item you wish to remove is already removed from the source. If it is not, CloudALLY will continue backing it up, even if you deleted it using the "Delete" button.

- The system will ask you to confirm the delete request. Once you have confirmed, the item will be removed from our system within a few days.

**Please confirm the delete request** ✕

You are about to delete items from the archive of  
**Bob.smith@ca4software.onmicrosoft.com**

A notification email with a delete will be sent to you upon completion.

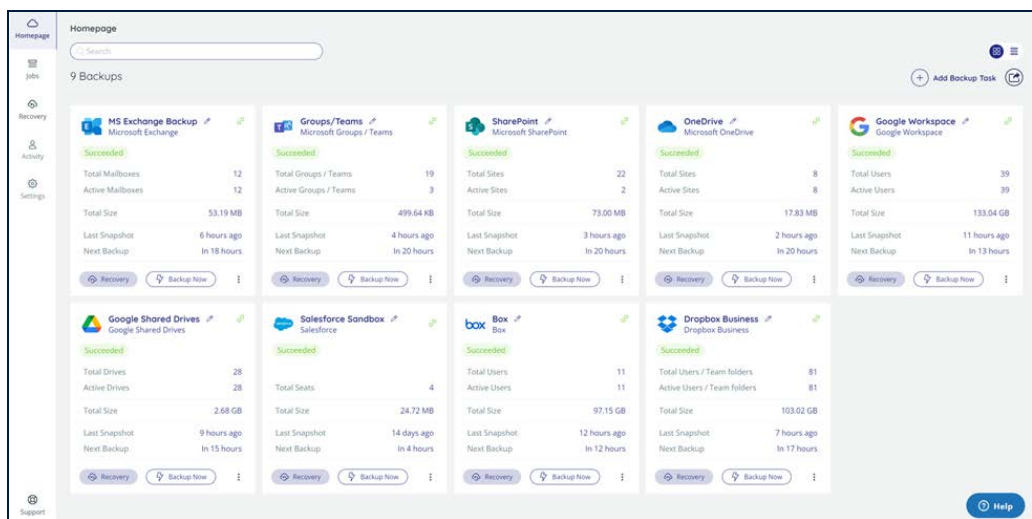
Cancel OK

## 6 Filtering and Viewing Drill-Down Details

This section explains the process of finding the exact backup data you are looking for using filtering.

### 6.1 Filtering by user

1. Click the *Homepage* option from the Navigation Panel. The *Homepage* screen appears.



2. Click the *Box* icon from the list or enter a keyword in the Search field to find a specific task. The *Box Backup* page is displayed.
3. The *Box Backup* page displays all the *Box* users available for the administrator account you are using. The page displays the details such as User Name, Email, Status, Backup Size, Last Backup Date, and available Actions. It also provides the means to filter the users and control the associated backup tasks.

### 6.1.1 Filtering Using Names or Statuses

You can filter using the following options:

- Enter a search phrase in the *Search by* field to view all the users with the entered keyword.
- Filter by statuses such as Not Active, Scheduled, Success, In Process, Failed, Paused, Archived, or Partial.

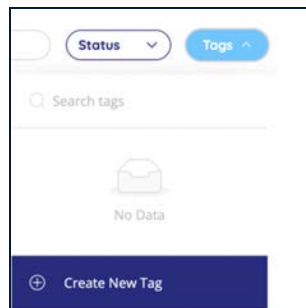
### 6.1.2 Filtering Using Tags

CloudAlly provides you with the means to add extra metadata to your backed up data in the form of "tags." For example, you might want to denote all users that belong to Managers, or all those that belong to the Sales Team.

You can use tags to quickly filter your list of users.

The **Tags** option is used to search for existing tags. By default, it is not active. To activate **Tags**:

1. Select at least one user.
2. Click **Tags**, and the following screen appears.

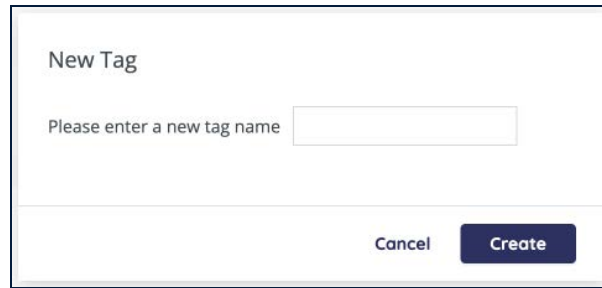


3. To search your existing tags, enter a tag name in the **Search tags** field.

### 6.1.3 Creating a New Tag

To create a new tag:

1. Click **Create New Tag**. A pop-up appears where you can enter a new tag name.



A dialog box titled "New Tag" with a text input field and two buttons: "Cancel" and "Create".

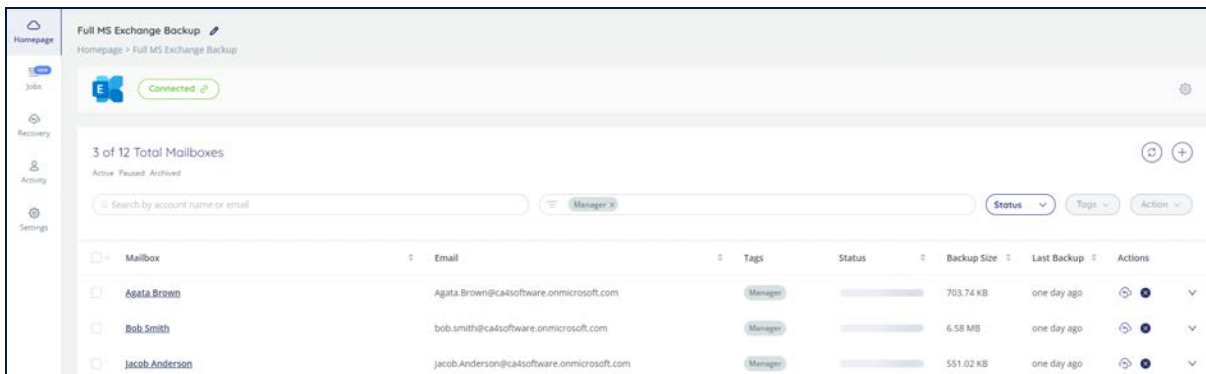
2. Enter a new tag name and click **Create**.

#### To apply tags to your users:

1. Select at least one user.
2. Click **Tag**.
3. Choose the desired tag for your user s.
4. Click **Apply**.

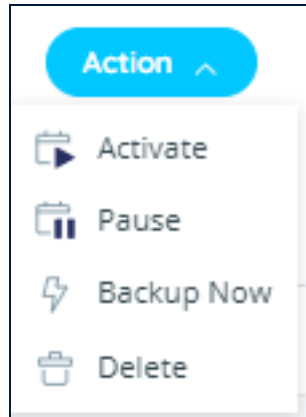
### 6.1.4 Filtering by Tag

In the **Filter by tag** field, enter a tag name. The accounts, teams or sites with those tags will appear.



### 6.1.5 Actions

To perform actions on a user, select at least one of them on the list, and the **Action** button will be enabled. Click **Action** to see the following drop-down menu:



- **Activate** enables backup in all the selected users.
- **Pause** halts the backup procedures on the selected users.
- **Backup now** starts the backup immediately. The backup in this case starts as soon as a backup processing machine is available, which may take several minutes.
- **Delete** removes the backup task and backup data for the selected users.

## 6.2 Viewing Backup Statistics with the Drill-down Feature

Select the desired user, and click the downward-facing arrow at the end of the row. This option enables you to drill down to the backup history dashboard.

When you drill down, you can find a diagram describing past backups, and a brief summary of the backup outcomes.



The diagram depicts the number of items backed up each day. By hovering your mouse over a column in the diagram, you can see the number of items backed up in each service. This number includes all new and changed items, so it may be greater than the total number of items in the backup. You can select the date range of the chart with the sliders underneath it. The maximum range displayed is 30 days.



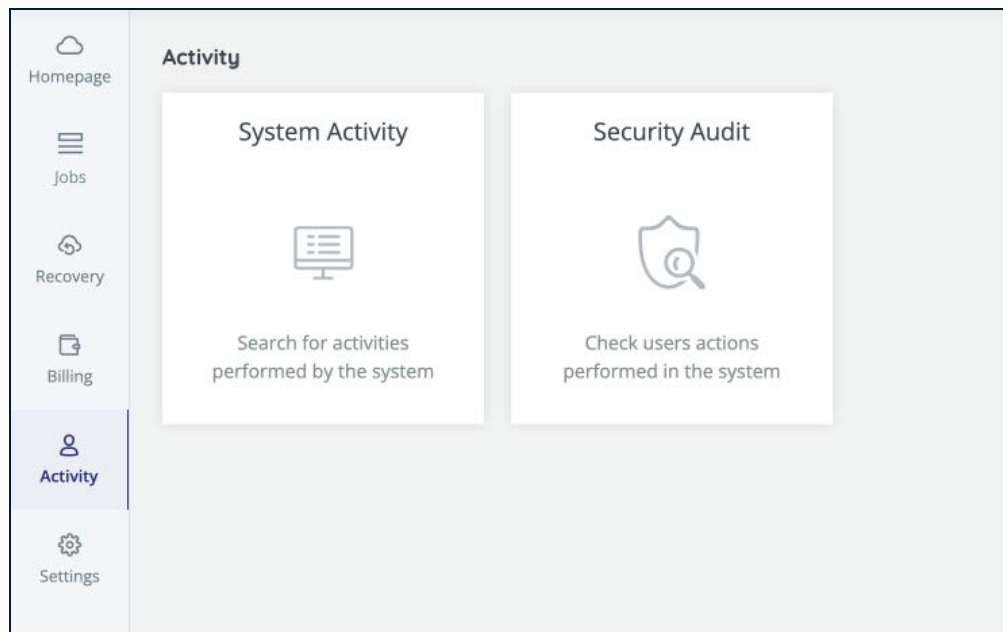
The summary tiles below the chart provide at-a-glance information about the backup: for each sub-service, they display the total number of items in the backup, the date of the last backup, and the outcome.

## 7 Managing Your Account

This section guides you through the processes of managing your Account activity, account settings, password, setting up two-factor authentication, and managing users.

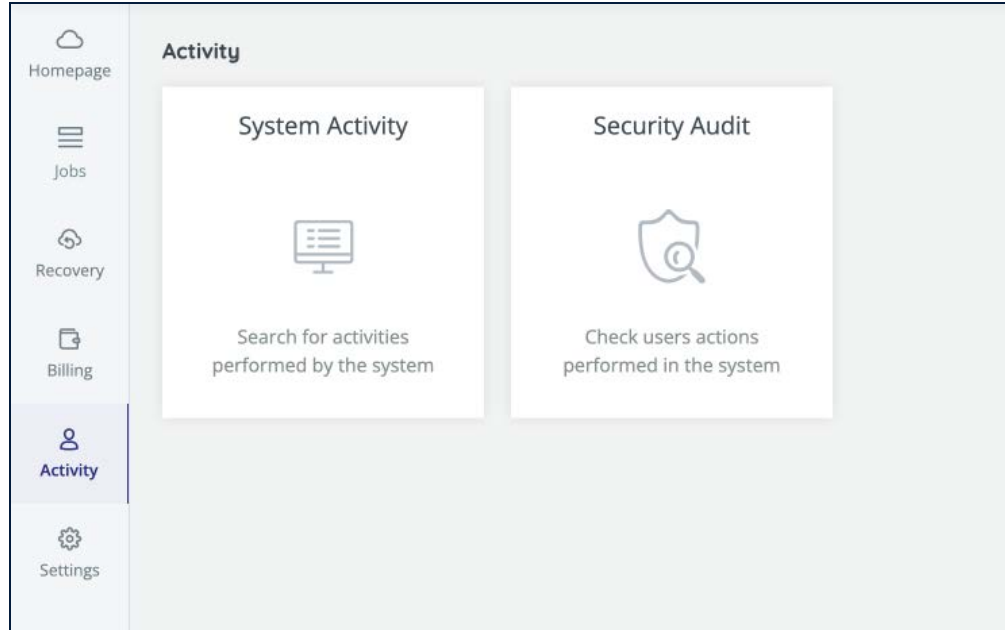
### 7.1 Viewing Account Activity

The Activity menu enables you to view your account activity, including System Activity and Security Audit. Click *Activity* on the navigation pane.



### 7.1.1 System Activity

Click **System Activity**.

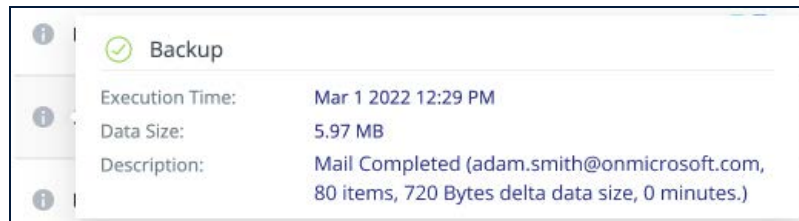


The **System Activity** page displays your account activity, with details such as Activity, Date and Time, Service, Sub-Service, Status, Task Name, and Item.

The screenshot shows the 'System Activity' page with a table of activities. The table has columns for Activity, Date and Time, Service, Sub Service, Status, Task Name, and Item. The activities listed include exports, backups, and restores for various services like Calendars, Notes, and Channels.

Activity	Date and Time	Service	Sub Service	Status	Task Name	Item
Export	Jul 12 2022 04:08 PM	Calendars		Succeeded	Full MS Exchange Backup / bob.smith@ca...	bob.smith@ca4software.onmicrosoft.com
Backup	Jul 11 2022 01:01 PM			Succeeded	Sharepoint backup	.../sites/AltaroRestored_Shared_mailbox_2021_08_31_11_05
Export	Jul 11 2022 01:00 PM	Channels		Succeeded	Full Teams Backup / AltaroRestored_Linda	AltaroRestored_Linda_Fuller_2021_08_31_05_36
Restore	Jul 11 2022 01:00 PM			Succeeded	One Drive / cloudally1-my.sharepoint.co...	.../Zsepo_kazandev_pro
Backup	Jul 11 2022 05:04 AM	Calendars		Failed	Full MS Exchange Backup	Mila.Scott@ca4software.onmicrosoft.com
Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup	Jacob.Anderson@ca4software.onmicrosoft.com
Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup	Agata.Brown@ca4software.onmicrosoft.com
Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup	Alex.Duglas@ca4software.onmicrosoft.com
Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup	Sarah.Johnson@ca4software.onmicrosoft.com
Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup	Jessica.Miller@ca4software.onmicrosoft.com
Backup	Jul 6 2022 05:06 AM	Notes		Succeeded	Full MS Exchange Backup	Charles.Wilson@ca4software.onmicrosof...

This page enables you to filter and search the list of backup tasks, export the list as a CSV file, and view more details on any backup task. The latter can be achieved by clicking the Info icon. The Info pop-up displays the backup execution time, the size of the stored data, and the number of entities, and the summary of the backup execution:



**Note:** Administrators can grant users permission to see the *System Activity* page by clicking **Settings > User Management**, and checking "View Account Activity."

## 7.1.2 Security Audit

The *Security Audit* page provides information about all the security-related actions that have happened in your account. The user activity that is displayed includes:

- Backup deleted
- User deactivated
- Settings changed
- Sign-in success or failure
- Permissions changed
- Notifications.

The page includes the date of the event, the type of activity, the service involved, the status of the activity, the account performing the activity, and the description.

Date	User Activity	Service	Status	Task	Performed By	Description
Sep 11 2023 03:09 PM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmic...	Native Sign in (IDK) Chrome from ip:46.117.234.42.
Sep 11 2023 01:57 PM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmic...	Native Sign in (IDK) Chrome from ip:46.117.234.42.
Sep 11 2023 01:39 PM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmic...	Native Sign in (IDK) Chrome from ip:46.117.234.42.
Sep 11 2023 12:05 PM	Notification	Google Shared Drives	Completed	Google Shared Drives / 1901January/2.0	bob.smith@ca4software.onmic...	Download Task for drive 1901January/2.0 has been de...
Sep 11 2023 12:05 PM	Notification	Google (Email)	Completed	Google Workspace / apostrophe@cloud...	bob.smith@ca4software.onmic...	Mail: Download task for mailbox apostrophe@cloud...
Sep 11 2023 12:04 PM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmic...	Native Sign in (IDK) Chrome from ip:46.117.234.42.
Sep 11 2023 10:52 AM	Sign-in		Completed	bob.smith@ca4software.onmicrosoft.com	bob.smith@ca4software.onmic...	Native Sign in (IDK) Chrome from ip:46.117.234.42.
Sep 10 2023 02:00 AM	Backup Deleted	Google Shared Drives	Completed	Google Shared Drives		The backup for the drive BE-AutoTests has been mark...
Sep 10 2023 02:00 AM	Notification	Google Shared Drives	Completed	Google Shared Drives		Backup for the drive BE-AutoTests has been deactiva...
Sep 10 2023 02:00 AM	Notification	Google Shared Drives	Completed	Google Shared Drives		Backup for the drive BE-AutoTests has been deactiva...
Sep 10 2023 02:00 AM	Backup Deleted	Google Shared Drives	Completed	Google Shared Drives		The backup for the drive BE-AutoTests has been mark...
Sep 8 2023 12:00 AM	Backup Deleted	Google Workspace	Completed	Google Workspace		The backup for the mailbox gakaantest@cloudrain.co...
Sep 8 2023 12:00 AM	Notification	Google Workspace	Completed	Google Workspace		Backup for the mailbox gakaantest@cloudrain.co...

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

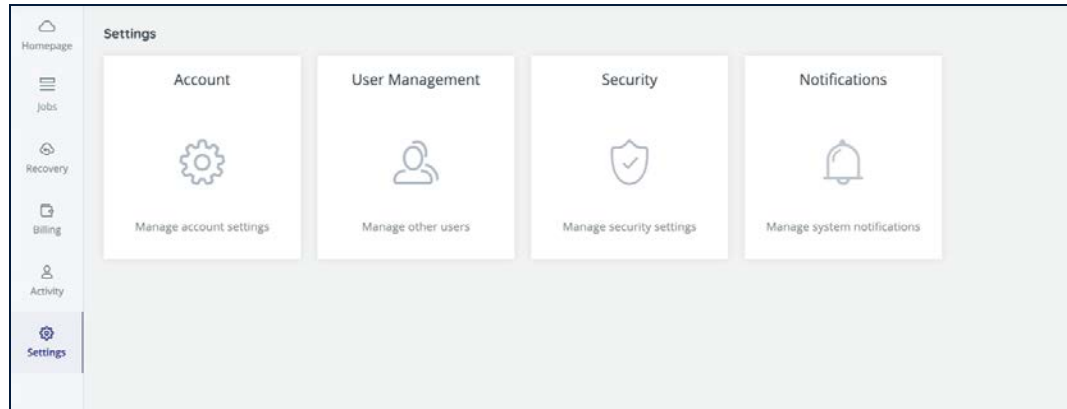
**Note:** Administrators can grant users permission to see the *Security Audit* page by clicking **Settings > User Management**, and checking "View Security Audit Page."

## 7.2 Managing Your Account Settings

The *Settings* page provides you with tools to control both your account and the accounts of users whose external credentials are linked to your account. The Settings section consists of the following sub-sections:

- Account
- User Management
- Security
- Notifications

You can find more details on each of the *Settings* pages below.

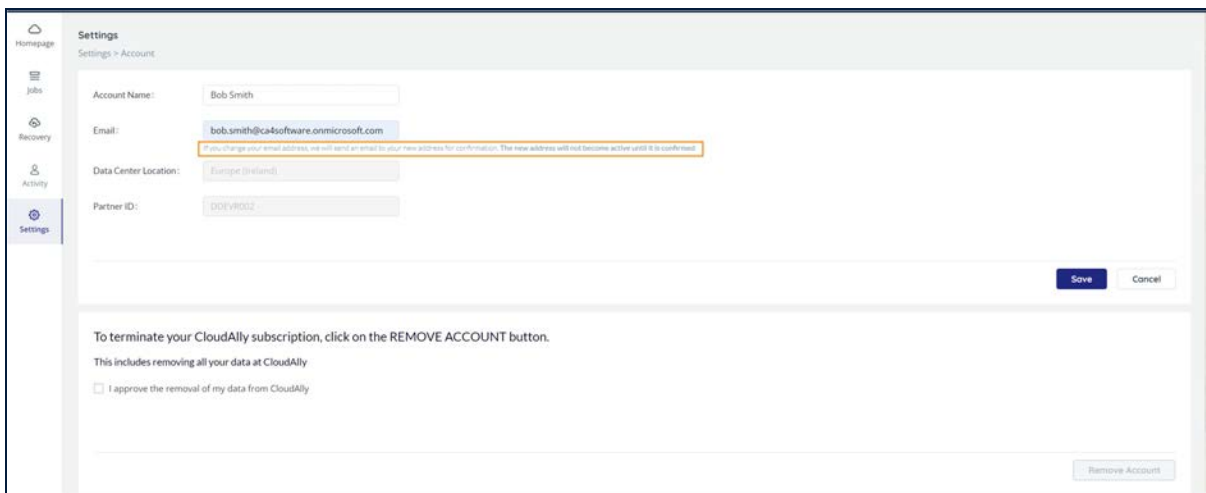


## 7.2.1 Account Settings

This page allows you to change the name of your account and the email address. You can only change the Data Center Location by contacting CloudAlly support. Finally, this page also allows you to terminate your account.

**To update or change your account details:**

1. From the Navigation Panel, click **Settings** and then click **Account**. The **Settings > Account** page is displayed.



You can update the Account Name and/or Email.

**Note:** If you change your email address, you will receive an email sent to your new address for confirmation. The new address will not become active until it is confirmed.

Click **SAVE**. The following screen will appear. If you did not receive the confirmation email, click **Resend Email Confirmation**

The screenshot shows the 'Settings > Account' page. It includes a sidebar with 'Settings' selected. The main content area has the following elements:

- Account Name:** Bob Smith
- Email:** Bob.smith@ca4software.onmicrosoft.com
- New Email - Waiting for Approval:** username@company.com (with a 'Discard' button)
- Data Center Location:** US East (Northern Virginia)
- Note:** Confirmation was sent to your new email username@company.com and is waiting for your approval. (with a 'Resend Email Confirmation' link)
- Buttons:** Save, Cancel

## 7.2.2 Canceling Your Subscription

To cancel your subscription:

1. Check the box for "I approve the removal of my data from CloudAlly" field and click **REMOVE ACCOUNT**.
2. The *Are you sure?* pop-up window is displayed with a confirmation request.
3. Click **YES** to confirm the cancellation.

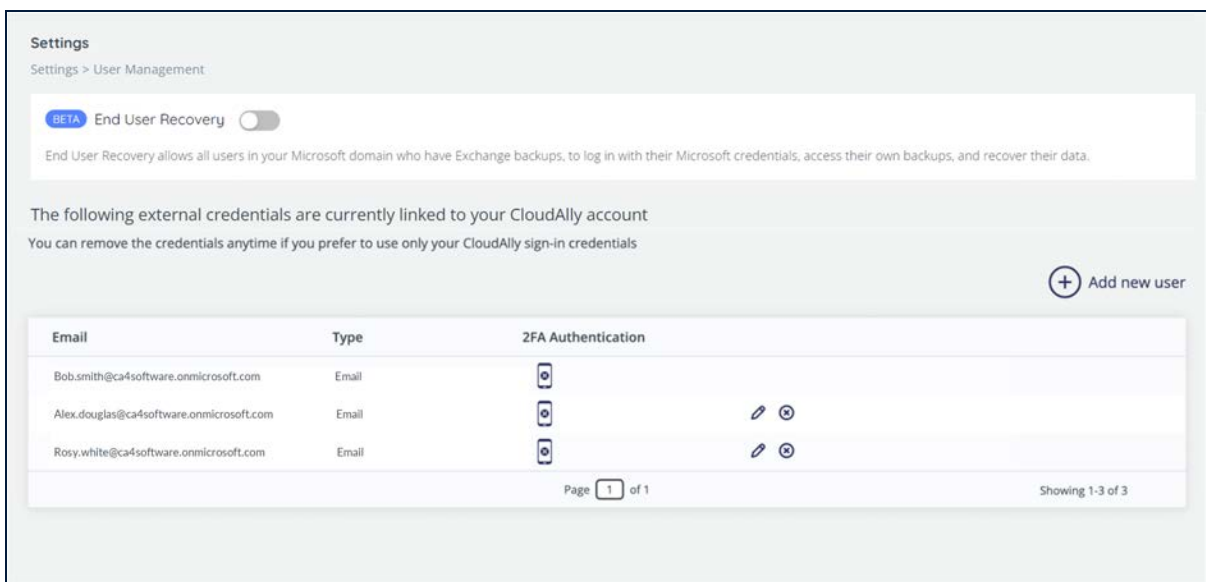
The pop-up window has the following structure:

- Title:** Are you sure? (with a close 'X' button)
- Text:** I approve the removal of my data from CloudAlly (with a checked checkbox)
- Buttons:** YES, NO

**Note:** To prevent mistaken deletions, there is a grace period of 7 days after your account is terminated. After the grace period, if your account is not reactivated, all data from all your backups will be deleted.

## 7.3 User Management

The page provides tools for fine-level control of the permissions and access levels of your users.



Settings  
Settings > User Management

**BETA** End User Recovery

End User Recovery allows all users in your Microsoft domain who have Exchange backups, to log in with their Microsoft credentials, access their own backups, and recover their data.

The following external credentials are currently linked to your CloudAlly account  
You can remove the credentials anytime if you prefer to use only your CloudAlly sign-in credentials

[+ Add new user](#)

Email	Type	ZFA Authentication
Bob.smith@ca4software.onmicrosoft.com	Email	
Alex.douglas@ca4software.onmicrosoft.com	Email	
Rosy.white@ca4software.onmicrosoft.com	Email	

Page 1 of 1  
Showing 1-3 of 3

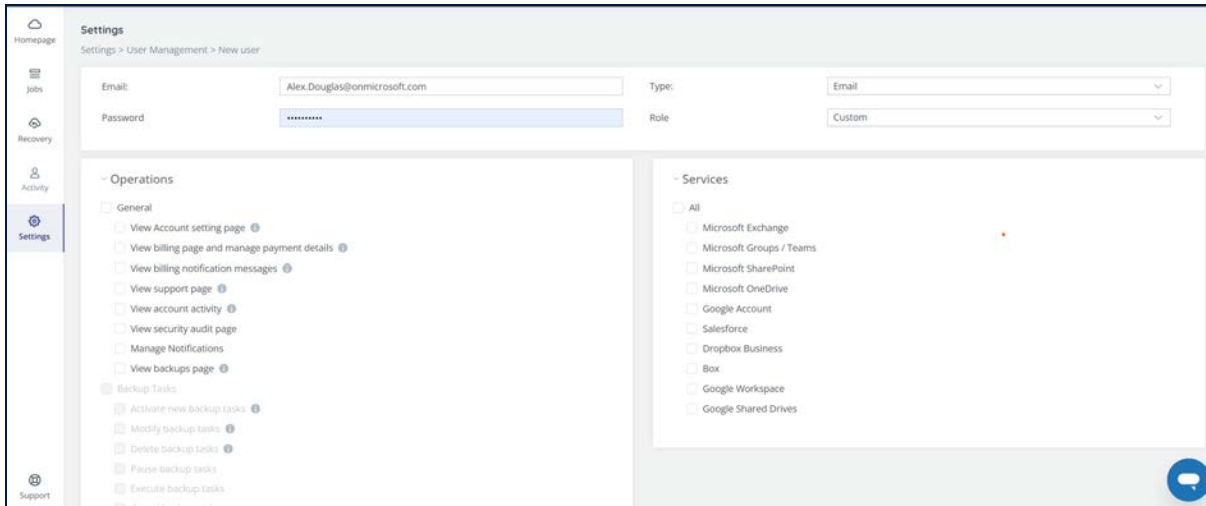
### 7.3.1 Adding a New User

System Administrators, both those who logged in to CloudAlly with a username and password, or with Microsoft credentials, can add new users.

Click **+ Add new user** to create a new user and start the configuration procedure for that user, or the pencil icon to edit an existing user's settings.

- Enter the new user's email address.
- Select the Authentication Type: Azure, Email, Google+, or Okta.
- Select the permissions role for the user. Selecting the role "Administrator" enables permissions to all services and operations. Or, you can selectively choose which permissions to grant from the list of services:

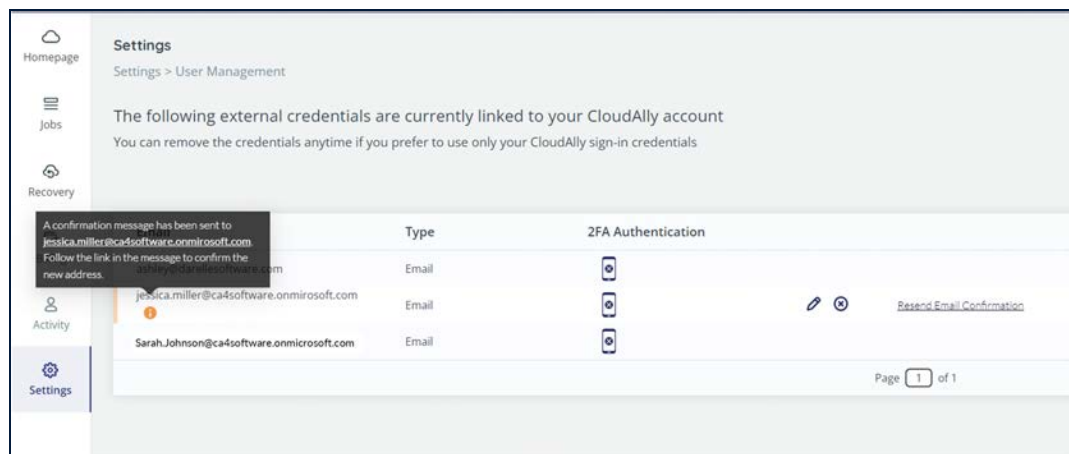




To save changes, scroll to the bottom of the page and click **SAVE**.

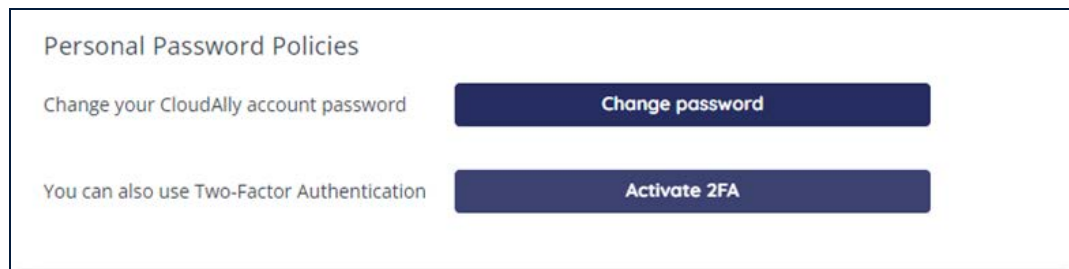
You will be returned to the Settings page. To complete the process, the user must confirm their email address using the link sent via email. This is a security measure, which ensures that the user's email address is valid.

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**.



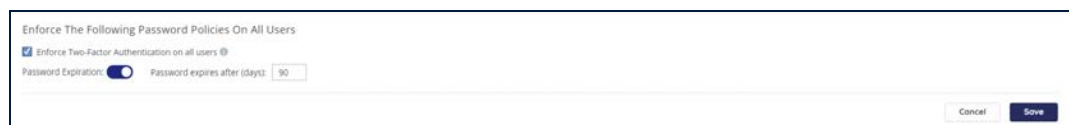
## 7.4 Security Settings

The *Security Settings* page enables you to:



- Update your password
- Set up two-factor authentication

You can also enforce certain security policies for your users' accounts.

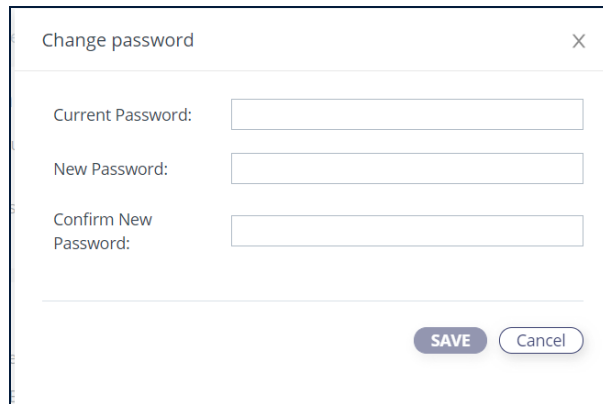


- With the **Enforce Two-Factor Authentication** option, you can make two-factor authentication mandatory for all the users in your account.
- By setting the **Password Expiration**, you can enable the password expiration option for all your users – you will be also be asked for the number of days before the users' passwords expire.

### 7.4.1 Changing Your Password for Credential-Based Authorization

You can change your existing account password by performing the following procedure:

1. From the **Settings > Security** page, in the Personal Password Policies panel, click **Change Password**.
2. The *Change password* pop-up is displayed.



A 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".

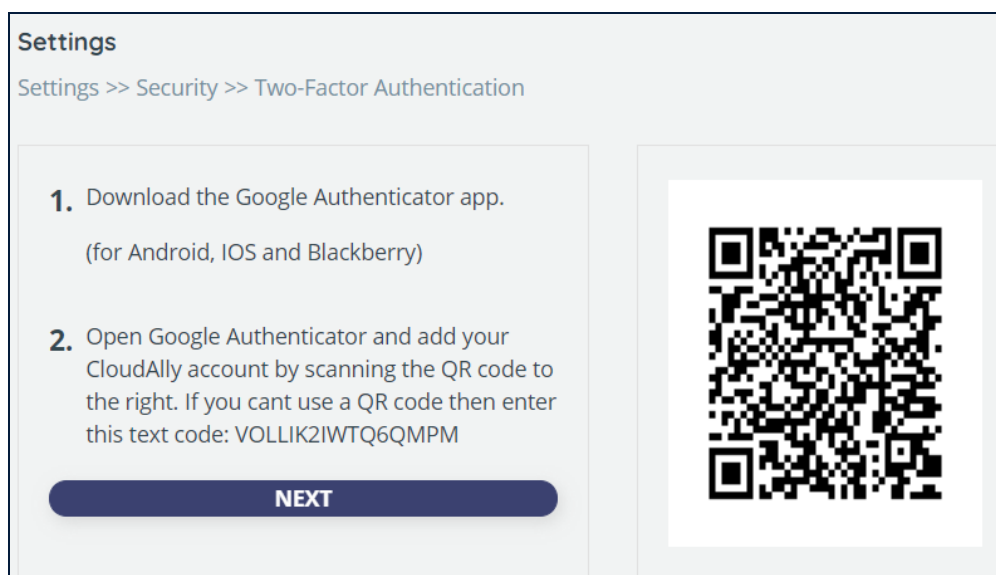
3. Enter the current password in the *Current Password* field.
4. Enter the new password in the *New Password* field.
5. Re-enter the new password in the *Confirm New Password* field.
6. Click **SAVE**. You can now use this password to access your account.

## 7.4.2 Two-Factor Authentication

Two-factor authentication provides additional security to your account and your backup data.

**To enable two-factor authentication:**

1. Click **Activate 2FA**. The Two-Factor Authentication page is displayed.



The "Settings" page for Two-Factor Authentication. The breadcrumb trail is "Settings >> Security >> Two-Factor Authentication". The page contains two main sections. The left section has a numbered list of instructions: "1. Download the Google Authenticator app. (for Android, IOS and Blackberry)" and "2. Open Google Authenticator and add your CloudAlly account by scanning the QR code to the right. If you cant use a QR code then enter this text code: VOLLIK2IWTQ6QMPM". Below the list is a dark blue button labeled "NEXT". The right section contains a large QR code for scanning.

2. Download an Authenticator app, depending on your platform.
3. Open the Authenticator app and add your account by scanning the QR code provided in the web application.
4. If you cannot use a QR code, then enter the text code provided in the web application.
5. A six-digit code is generated.
6. Click **NEXT**.
7. Enter the 6-digit code that the application generated.
8. Click **ENABLE** to complete the process of activating the Two-factor authentication.

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

### 7.4.3 SAML

The Security Assertion Markup Language (SAML) is an open federation standard that allows an identity provider (IdP) to authenticate users and then pass an authentication token to another application known as a service provider (SP).

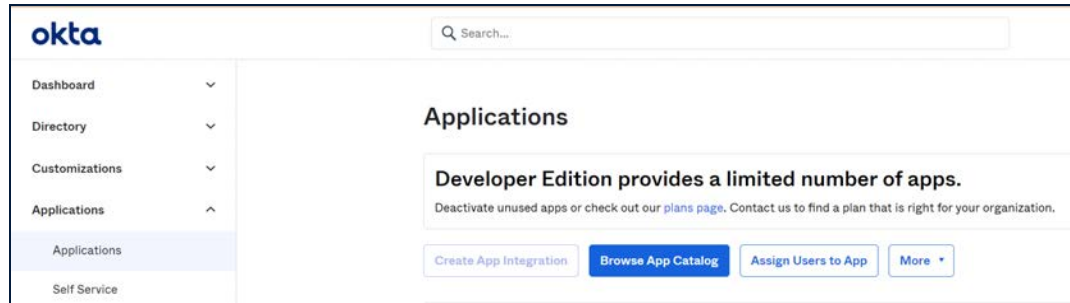
CloudAlly supports Okta as its SAML provider.

There are two steps to setting up Okta so that you can use it to log in to CloudAlly:

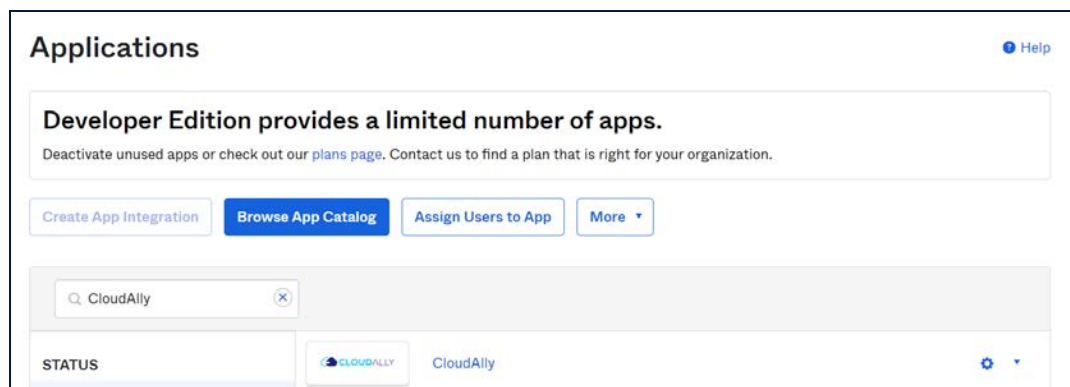
- Setting up CloudAlly in the Okta Application
- Setting up Okta in the CloudAlly application

#### 7.4.3.1 Setting up CloudAlly in the Okta Application

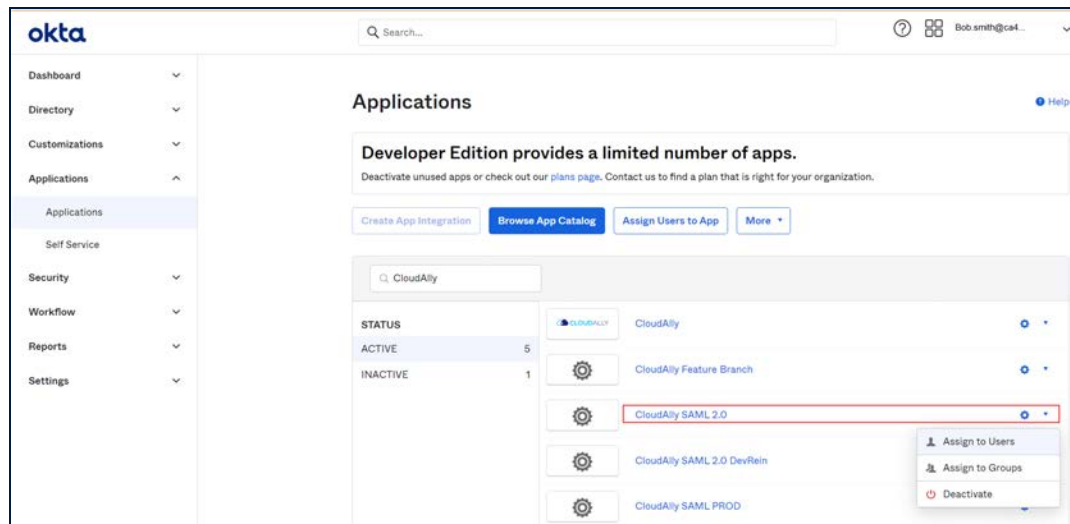
- In the Okta application, click **Applications > Applications > Browse App Catalog**.



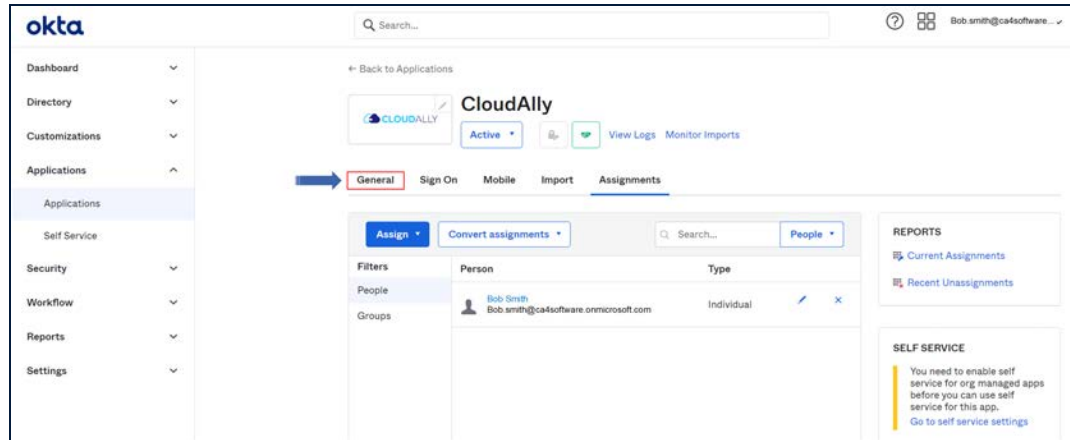
- In the search bar, enter CloudAlly.



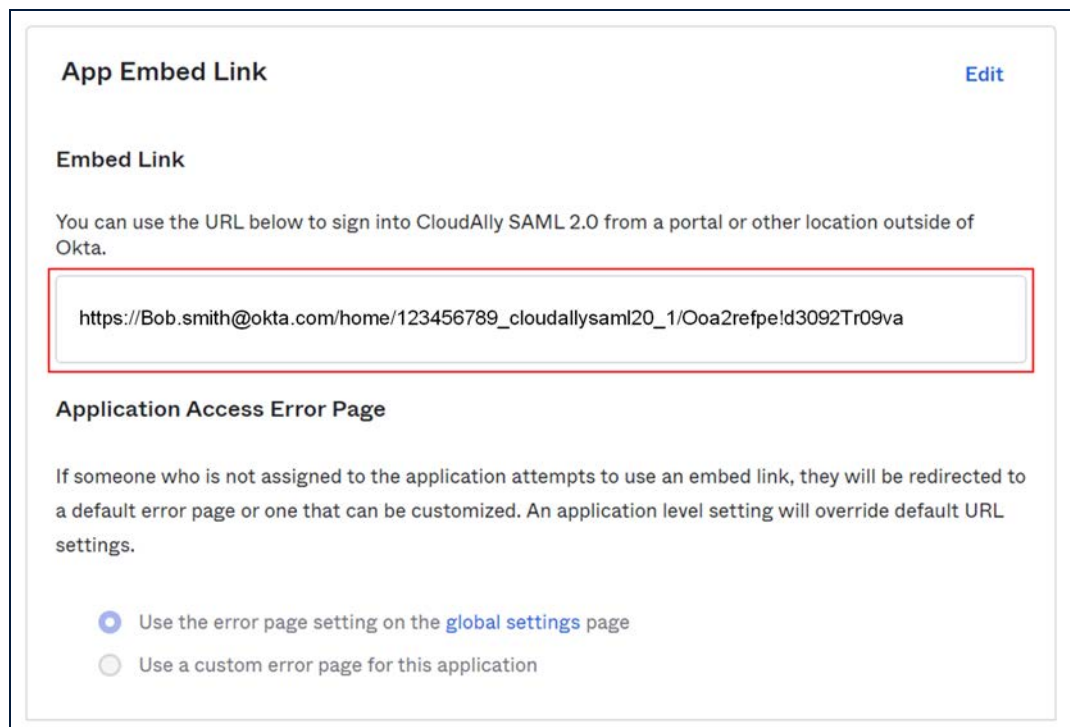
- Click the arrow next to CloudAlly SAML 2.0, and **Assign to Users** or **Assign to Groups**.



- Click CloudAlly SAML 2.0, and on the next page, click the **General** tab.

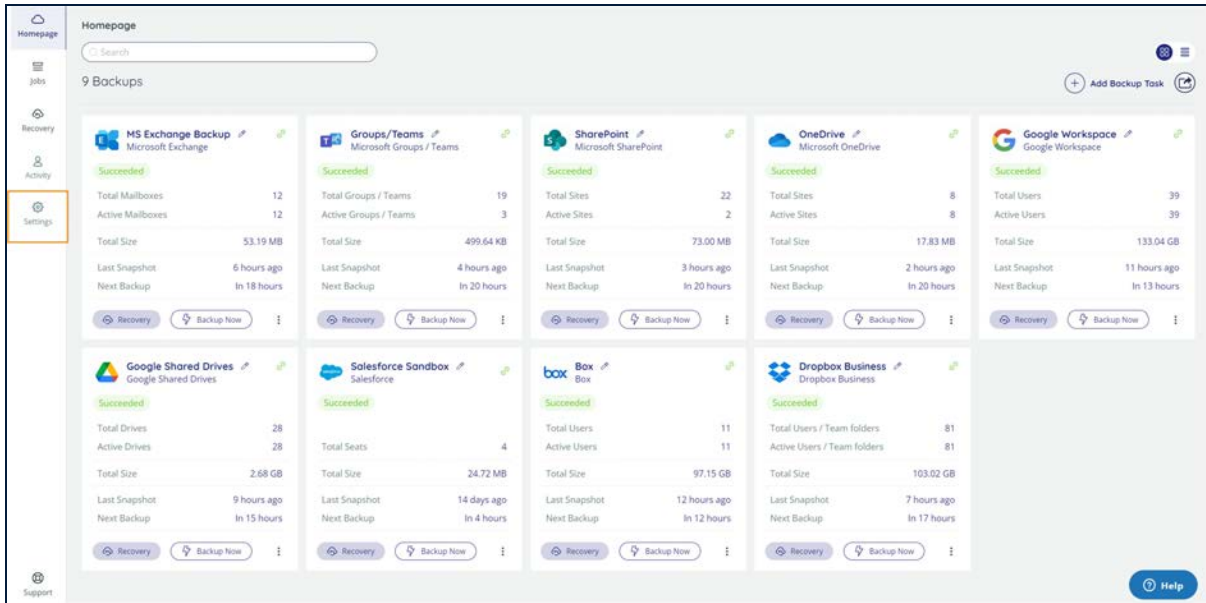


- Scroll down until you see the **App Embed Link** section. Copy the URL that is displayed - you will need this to set up Okta in the CloudAlly app.

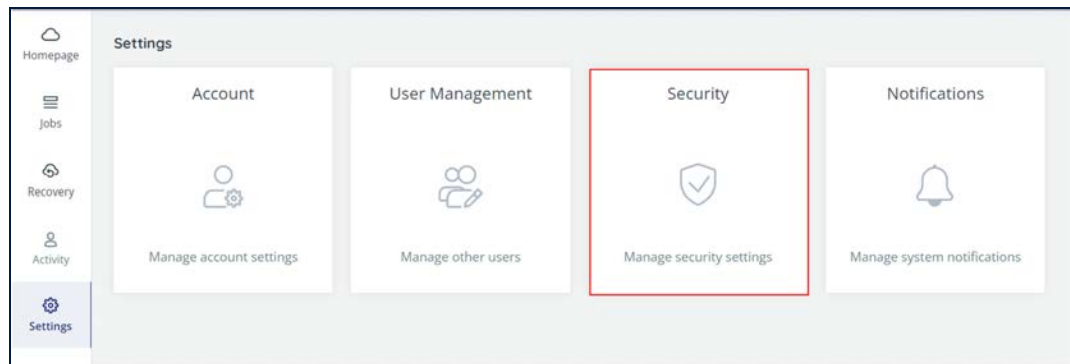


### 7.4.3.2 Setting Up Okta in the CloudAlly Application

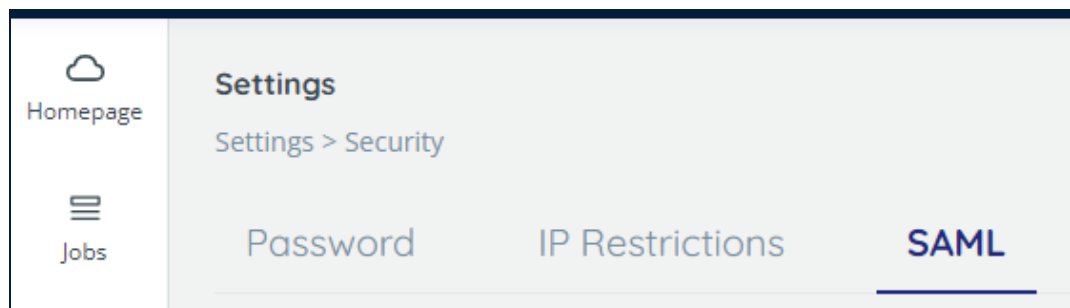
1. From the Homepage, click **Settings** in the Navigation panel.



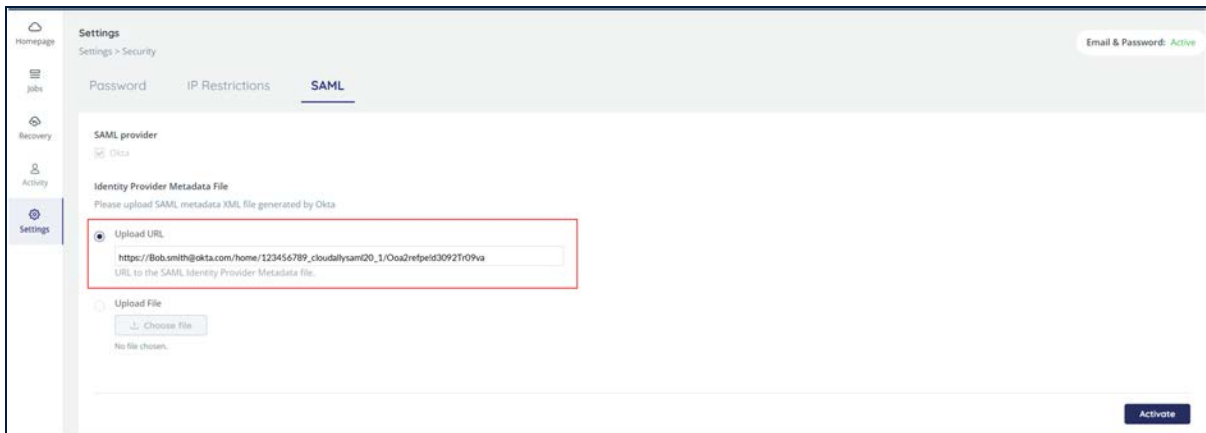
2. On the Settings page, click **Security**.



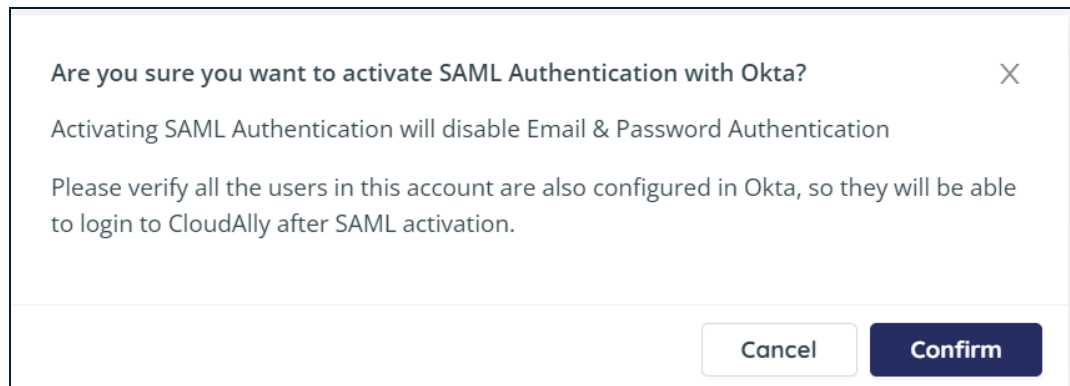
3. Click the **SAML** tab.



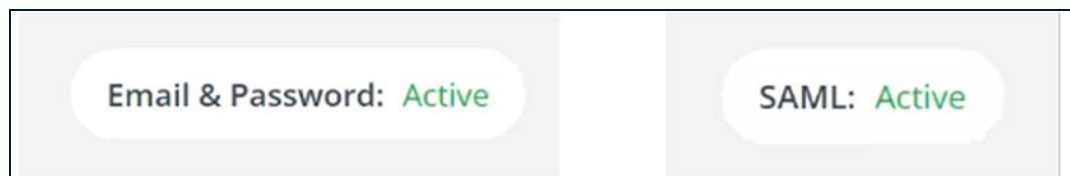
- Paste the URL that you copied from the Okta site.



- Click **Activate**.
- Read the "Are you sure you want to activate SAML Authentication with Okta" message in the next window, and click **Confirm**.



After clicking **Confirm**, the Activate state changes from **Email & Password: Active** to **SAML: Active**.





## 7.4.4 IP Restrictions

Need fine-grained access control of your endpoints? You can restrict access to the 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.

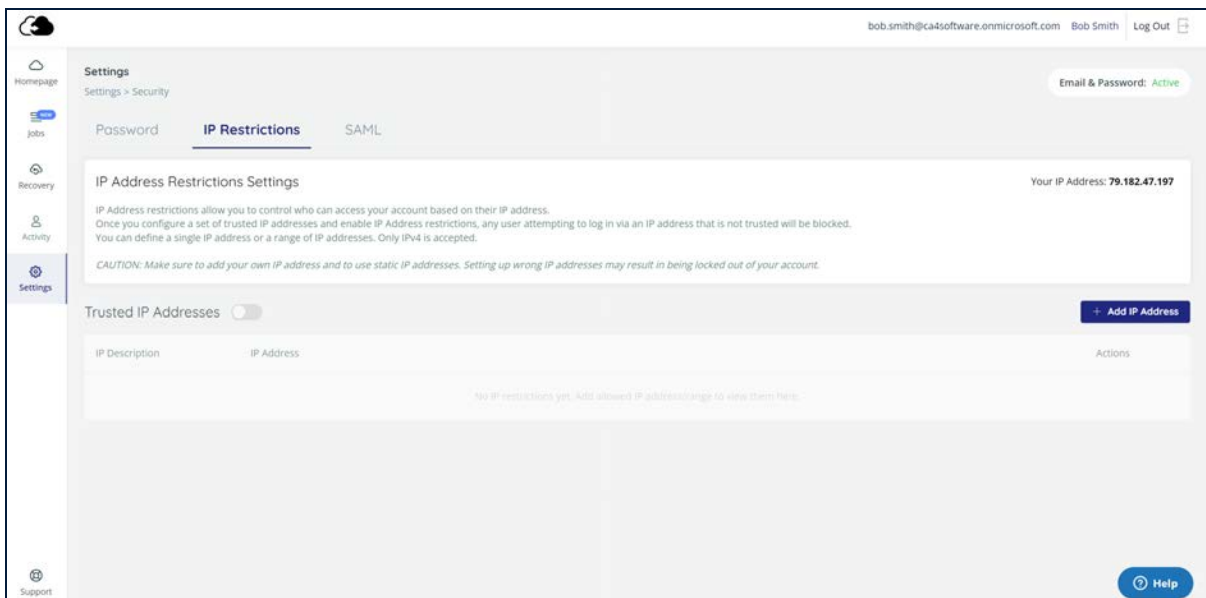
### Setting Up IP Restrictions

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

#### IMPORTANT!

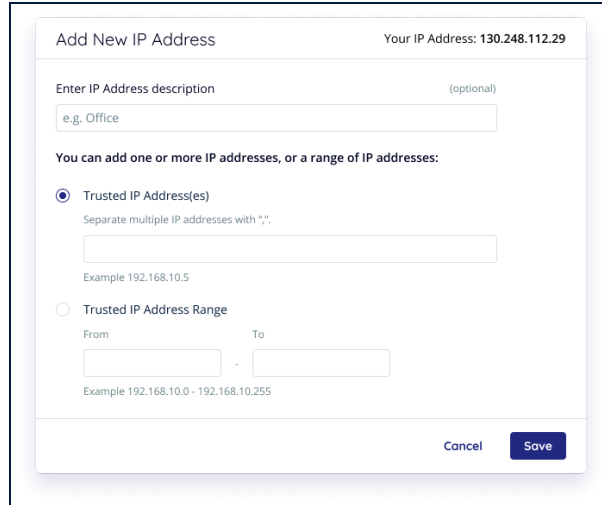
It is strongly recommended to use this feature only if you have a static IP address, to prevent users from being locked out.

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



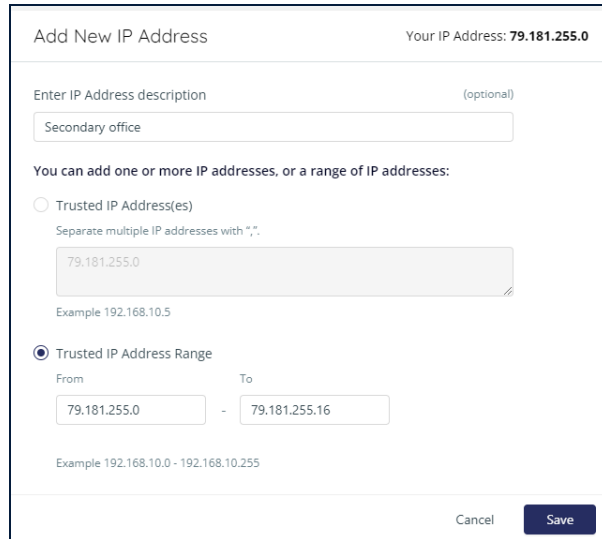
2. Click **+ Add IP Address**.

3. Enter one or more IP addresses:
  - a. Enter individual addresses separated by commas, and an optional description.



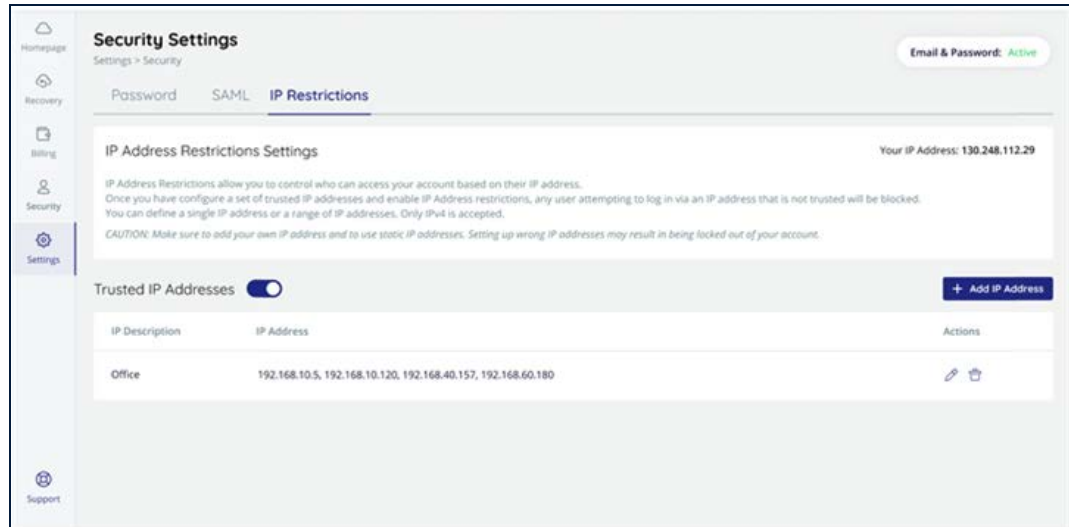
The screenshot shows a dialog box titled "Add New IP Address" with a sub-header "Your IP Address: 130.248.112.29". It contains a text input field for "Enter IP Address description (optional)" with the placeholder "e.g. Office". Below this is a section titled "You can add one or more IP addresses, or a range of IP addresses:". There are two radio button options: "Trusted IP Address(es)" (which is selected) and "Trusted IP Address Range". Under "Trusted IP Address(es)", there is a text input field with the placeholder "Separate multiple IP addresses with ','" and an example "Example 192.168.10.5". Under "Trusted IP Address Range", there are two input fields labeled "From" and "To" with a hyphen between them, and an example "Example 192.168.10.0 - 192.168.10.255". At the bottom right are "Cancel" and "Save" buttons.

- b. Or, enter a one or more ranges of contiguous addresses, and an optional description. Multiple ranges could be used to accommodate VPN and internal networks.



The screenshot shows a dialog box titled "Add New IP Address" with a sub-header "Your IP Address: 79.181.255.0". It contains a text input field for "Enter IP Address description (optional)" with the placeholder "Secondary office". Below this is a section titled "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). Under "Trusted IP Address(es)", there is a text input field with the placeholder "Separate multiple IP addresses with ','" and an example "Example 192.168.10.5". Under "Trusted IP Address Range", there are two input fields labeled "From" and "To" with a hyphen between them, containing the values "79.181.255.0" and "79.181.255.16" respectively, and an example "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.



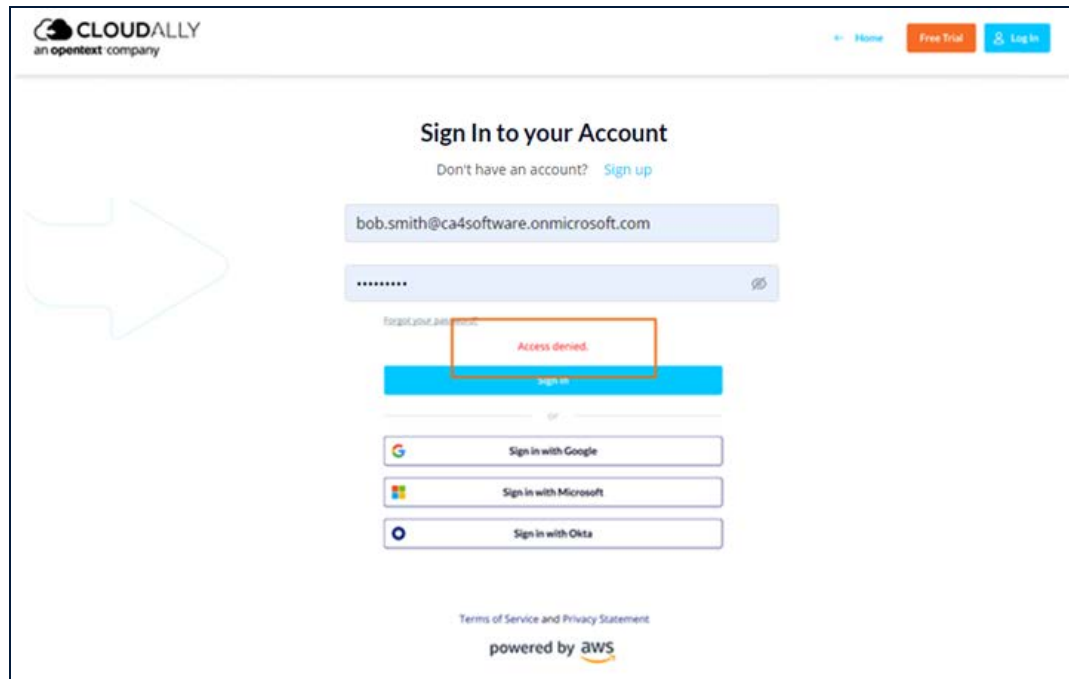
You can edit your list of addresses by clicking the pencil icon, or delete ones that you no longer want on your trusted list by clicking the trash icon.

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

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

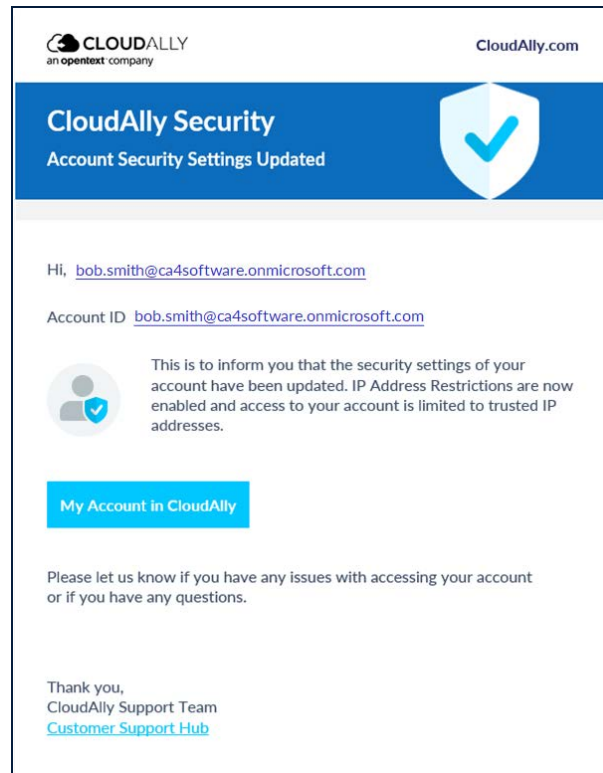
### Blocking Access

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



## 7.4.5 Email Notifications

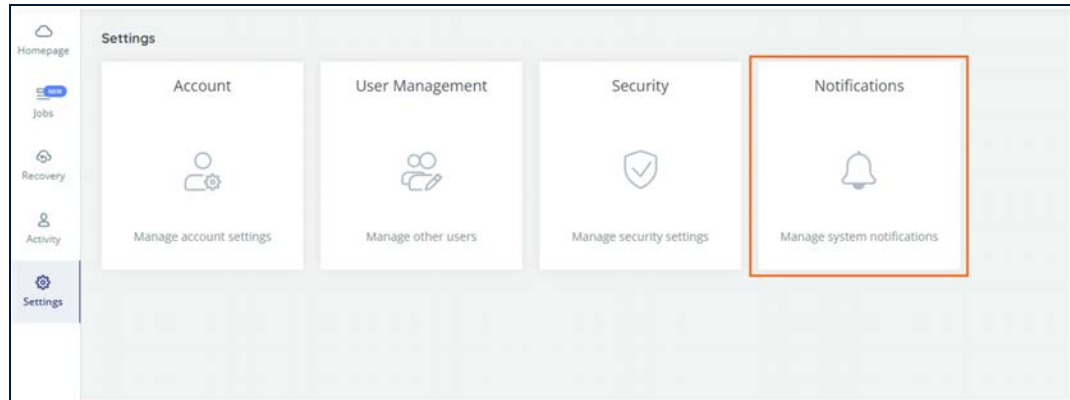
Whenever you enable or disable IP restrictions, or modify the addresses, CloudAlly will send you an email notification, letting you know what has changed.



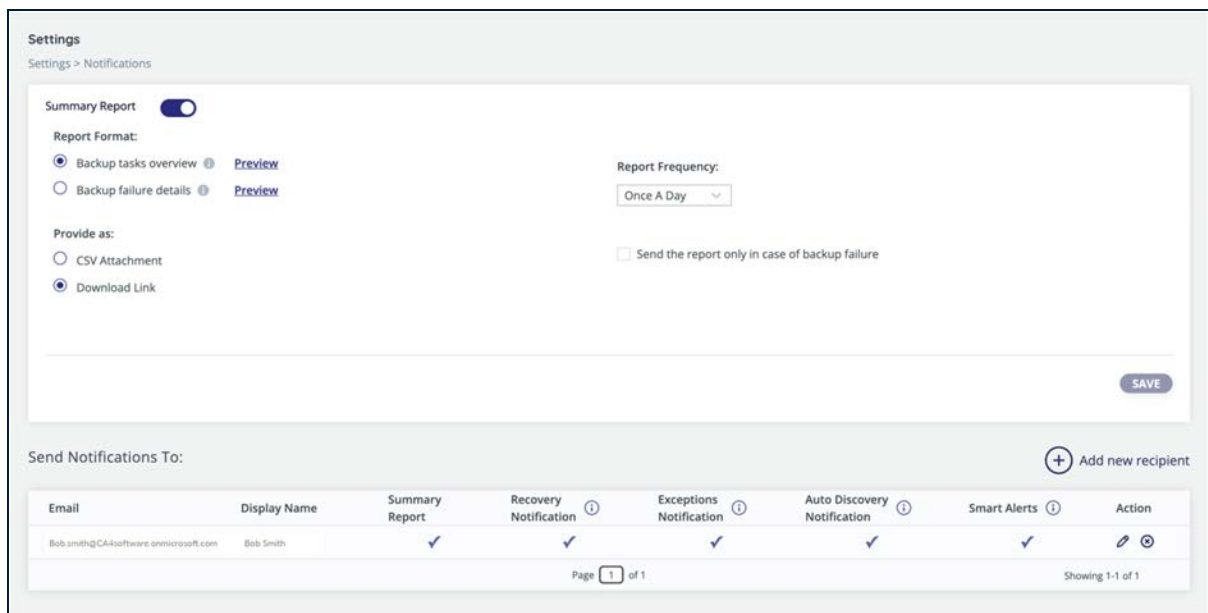
## 7.5 Notifications Settings

This menu option enables you to manage your system notifications.

From the Navigation Panel, click **Settings > Notifications**.



The following screen will appear:



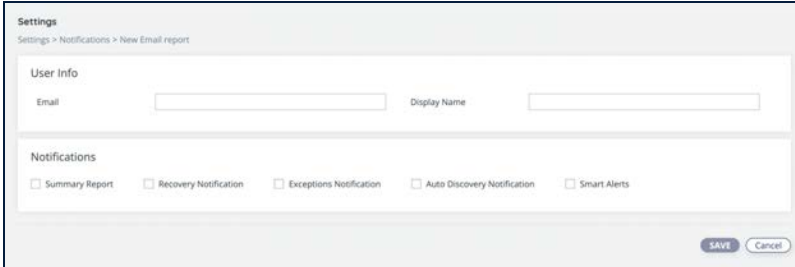
The top of the screen enables you to configure the following options:

- Report Format: Backup tasks overview vs. backup failure details
- CSV Attachment vs. Download Link
- Report Frequency: daily, weekly or monthly
- Send the report only in case of backup failure

**To set up a new recipient:**

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 desired notification types:
  - a. Summary Report
  - b. Recovery Notification
  - c. Exceptions Notification
  - d. Auto Discovery Notification
  - e. Smart Alerts
4. Click **SAVE** to create the new recipient.



The screenshot shows a web interface for configuring a new email report. The page title is 'Settings' with a breadcrumb trail 'Settings > Notifications > New Email report'. Under the 'User Info' section, there are two input fields: 'Email' and 'Display Name'. Below this is a 'Notifications' section with five checkboxes: 'Summary Report', 'Recovery Notification', 'Exceptions Notification', 'Auto Discovery Notification', and 'Smart Alerts'. At the bottom right, there are two buttons: 'SAVE' and 'Cancel'.

## 8 Managing Subscriptions and Payments

### 8.1 Subscribing to CloudAlly

Once the trial period has ended, you need to subscribe to CloudAlly to access and manage your backups, otherwise your backed up data will be deleted.

**To subscribe to a plan:**

1. Click the **Subscribe** link displayed in your account. Alternatively, you can click the **Billing** option of the Navigation Panel.

The *Review Billing* page is displayed with the option to select either **MONTHLY** or **ANNUAL** billing options.

**Note:** You can subscribe before the end of the trial period, and the payment period will start after the trial period is over.

2. Click **MONTHLY** or **ANNUAL**, depending on your preference.

You are redirected to the *Payment Details* page. Fill in the billing and credit card details to finish the subscription process. Refer to [Payment Details](#) for more information.

#### 8.1.1 Monthly Subscriptions

When you subscribe to a monthly plan, the credit card that you registered in the *Billing > Payment Details* page will be charged the amount that you owe.

CloudAlly's billing is handled by a PCI-compliant payment processor.

To finalize your subscription, enter your credit card details and general billing information, and then click **Subscribe**.

The initial payment will be charged at the end of your 2-week trial period.

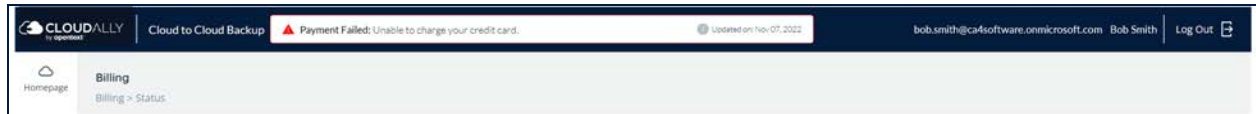
A receipt will be emailed to you each month after you are charged.

If CloudAlly is unable to charge your credit card (e.g., because it has expired), you will be notified by email. Additionally, a message will appear in the application that



you need to go to the *Billing Status* page so you can review your billing details, and then update your credit card information if necessary.

**Note:** The billing status is usually updated within a few minutes after the payment is complete. If the status has not updated after 24 hours, please contact [support@cloudally.com](mailto:support@cloudally.com).



**Note:** The monthly payments are processed automatically once you provide the required information in the Payment Details section, and it has been verified that your credit card is valid. To disable automatic payment processing, please contact CloudAlly support. Instead, you will start receiving monthly invoices for the payments.

## 8.1.2 Annual Subscriptions

When you subscribe to an annual plan, you will receive a confirmation message that your request has been submitted, and then CloudAlly support will send you an email, asking that you confirm your annual subscription request.

Once you have confirmed, CloudAlly will email an invoice to you, payable in 30 days by credit card, PayPal, or bank transfer.

After the initial payment, CloudAlly will send you an invoice 30 days before your payment is due, in 11 months. You will also be reminded that your annual subscription is due online:

**Note:** The billing status is usually updated within a few minutes after the payment is complete. If the status has not updated after 24 hours, please contact [support@cloudally.com](mailto:support@cloudally.com).

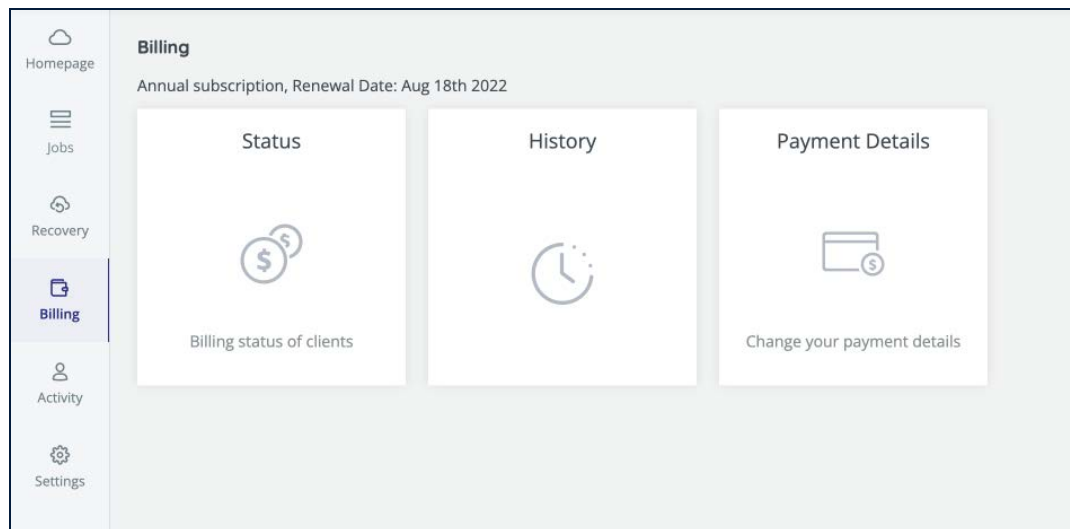


Should you fail to make your annual payment, you will be reminded with a message like this:



After you finalize your subscription, the *Billing > Payment Details* page displays additional billing management options and provides a brief summary of the payment information for the current period and the next payment date.

## 8.2 Payment Details



The *Payment Details* page contains the information used for billing.

### 8.2.1 Monthly Subscriptions

If you have chosen a monthly payment plan, you can update your credit card and billing details here:

The screenshot shows a 'Billing' page with a breadcrumb 'Billing > Payment'. It features two main sections: 'Credit Card Details' and 'Billing Details'. The 'Credit Card Details' section has a 'Card Number' dropdown menu showing 'CREDIT: XXXX-XXXX-XXXX-1111 (12/2023)' and three buttons: 'ADD NEW CARD', 'ACTIVATE CARD', and 'Delete Card'. The 'Billing Details' section contains various input fields: 'Currency' (EUR), 'Title' (Mr), 'First Name' (Bob), 'Last Name' (Smith), 'Billing Email' (bob.smith@ca4software.onmicrosoft.com), 'Company Tax Id' (12345), 'Company Name' (12345), 'Address Line 1' (123 Main Street), 'Country' (United Kingdom), 'State', 'City' (Anytown), 'Zip Code/Postal Code' (12345), 'Phone number' (2011234567), and 'Payment Day' (9). There is also an 'Email Invoice/Receipt' section with radio buttons for 'Link' (selected) and 'Attachment'. An 'UPDATE BILLING DETAILS' button is located at the bottom right.

### 8.2.1.1 Add New Card

The **ADD NEW CARD** option enables you to define your card information for a monthly subscription payment.

The screenshot shows the 'Billing' page with a breadcrumb 'Billing >> Payment details' and a status 'Monthly subscription, next payment: Dec 13th 2020'. It features two main sections: 'Credit Card Details' and 'Add new card details'. The 'Credit Card Details' section has a 'Card Number' dropdown menu showing 'undefined: XXXX-XXXX-XXXX-444...' and three buttons: 'ADD NEW CARD', 'ACTIVATE CARD', and 'Delete card'. The 'Add new card details' section has a 'Card Holder's Name' input field, a 'Card Number' input field with a blue mask and labels 'Card Number', 'MM / YY', and 'CVV', and an 'ADD NEW CARD' button at the bottom right.

To create a new payment method:

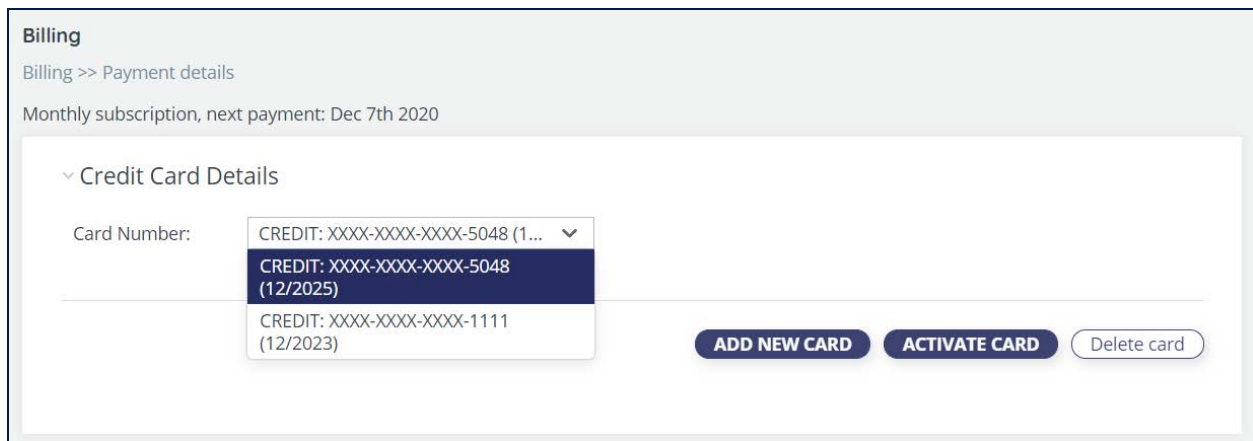
1. Click **ADD NEW CARD**.
2. Enter the card details such as Card Number, CVV, Card holder's name, and card expiry date.
3. Click **ADD NEW CARD**.

The new card information is saved and activated, and you can use this card.

### 8.2.1.2 Change Payment Method

To change your existing payment method:

1. Click the drop-down list and select the payment method from the Cards Number drop-down list.
2. Click the payment method from the list (the screen shot below depicts choosing a different credit card).
3. Click **ACTIVATE CARD** to set the selected card as the preferred payment method.



The details section displays billing information such as Currency, Title, Name, and Billing email.

4. Below, there are more fields in the Billing details section. The Company Tax ID field indicates your company tax ID. (This is mandatory for Israeli companies.)

**Note:** Due to Value-added tax (VAT), Israeli companies must include their Tax ID. Therefore, the Company Tax ID field is mandatory for Israel, and if this field is not completed, our company will not be able to provide you with backup services.

▼ Billing Details

* Currency:	<input type="text" value="USD"/>	Title:	<input type="text"/>
* First Name:	<input type="text"/>	* Last Name:	<input type="text"/>
* Billing Email:	<input type="text"/>	Company Tax Id:	<input type="text"/>
* Company Name:	<input type="text"/>	* Address Line 1:	<input type="text"/>
Address Line 2:	<input type="text"/>	Address Line 3:	<input type="text"/>
* Country:	<input type="text"/>	State:	<input type="text"/>
* City:	<input type="text"/>	* Zip Code/Postal Code:	<input type="text"/>
* Phone number:	<input type="text"/>	Email Invoice/Receipt:	<input type="radio"/> Link <input checked="" type="radio"/> Attachment

[UPDATE BILLING DETAILS](#)

5. Update the required fields. The fields marked with the \* symbol are mandatory.
6. Click **UPDATE BILLING DETAILS**.
7. The updates are saved.

You can choose whether you want to receive the Invoices or Receipts as a link or as an attachment to the email.

**Note:** You can change the billing currency by contacting CloudAlly support.

## 8.2.2 Annual Subscriptions

If you have chosen an annual payment plan, you can update your billing details here. When you are done, click **SAVE**.

The screenshot shows the 'Billing' section of the user interface. The page title is 'Billing > AnnualSubscription' and it indicates 'Annual subscription, Renewal Date: Oct 19th 2023'. The form is divided into two sections: 'Billing Details' and 'Billing contact'. The 'Billing Details' section includes fields for Subscription Starting Date (November 3, 2022), Currency (USD), Country (United States), State (New York), City (New York), Zip Code/Postal Code (01234), Company Name (Pizza Perfecto), Company Tax Id (987654321), Company Address (14652 Broadway), and Purchase Order Number (Optional) (4350123). The 'Billing contact' section includes fields for First Name (Bob), Last Name (Smith), and Billing Email (Bob.smith@ca4software.onmicrosoft.com). A 'Help' button is visible in the bottom right corner of the form area.

## 8.3 Billing Status

### Annual Subscription

When you have paid your annual subscription, this page displays the next payment forecast for the upcoming payment date. The details include Service type and backup name, Quantity, Unit Price, and the Total Amount.

The screenshot shows the 'Billing > Status' page. A note at the top states: 'Note: The billing status is usually updated within a few minutes after the payment is complete. If the status has not updated after 24 hours, please contact support.' Below the note, there is a summary table with the following data:

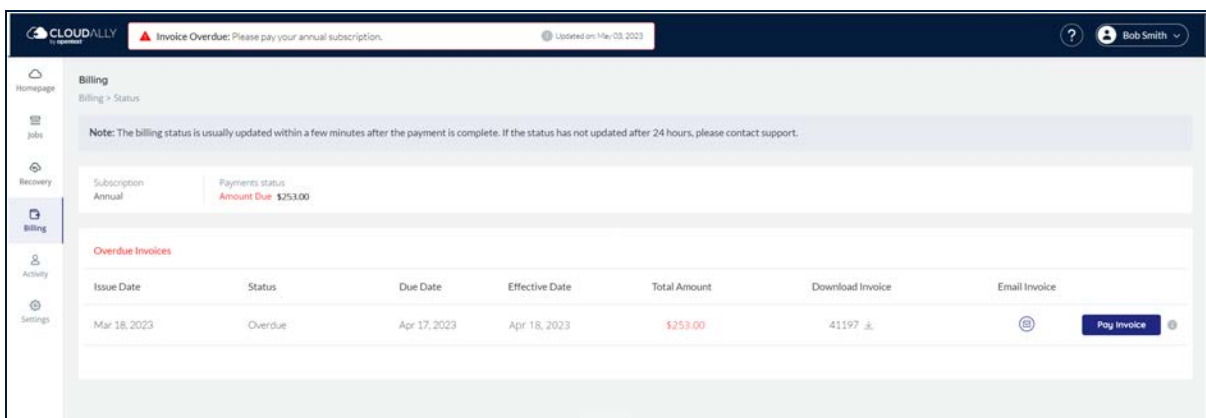
Subscription	Payments status	Next renewal date	Forecast for next payment
Annual	Paid	Sep 12, 2023	\$226.80

Below the summary table is a 'Payment Forecast' table:

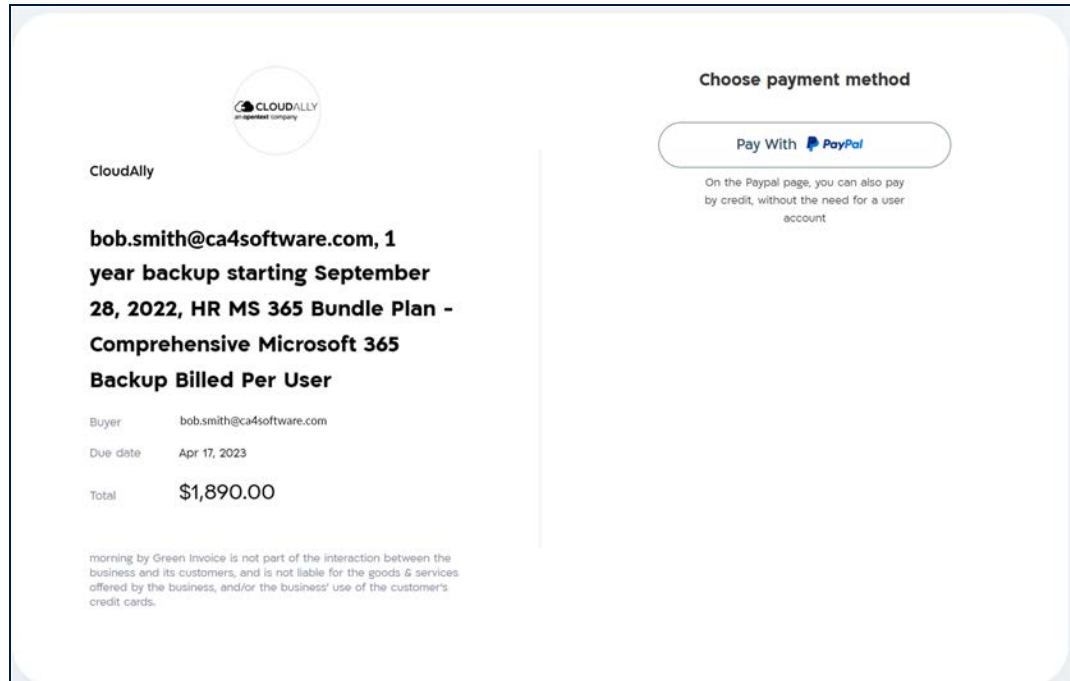
Service	Total Quantity	Billable Quantity	Unit Price	Total Amount
MS Exchange (365)	6 mailboxes	6 mailboxes	\$37.80	\$226.80

When your subscription amount becomes due, the Billing Status page displays the following information:

- **Issue date** - the date the invoice was issued
- **Status** - Paid, Due or Overdue
- **Due Date** - the date by which the invoice must be paid.
- **Effective Date** - the date the subscription period begins.
- **Total Amount** - amount owed.
- **Download Invoice** - Click this to download a PDF copy of your invoice.
- **Email Invoice** - Click this to send an invoice to your email address.
- **Pay Invoice** - Click this to directly pay the amount owed online.

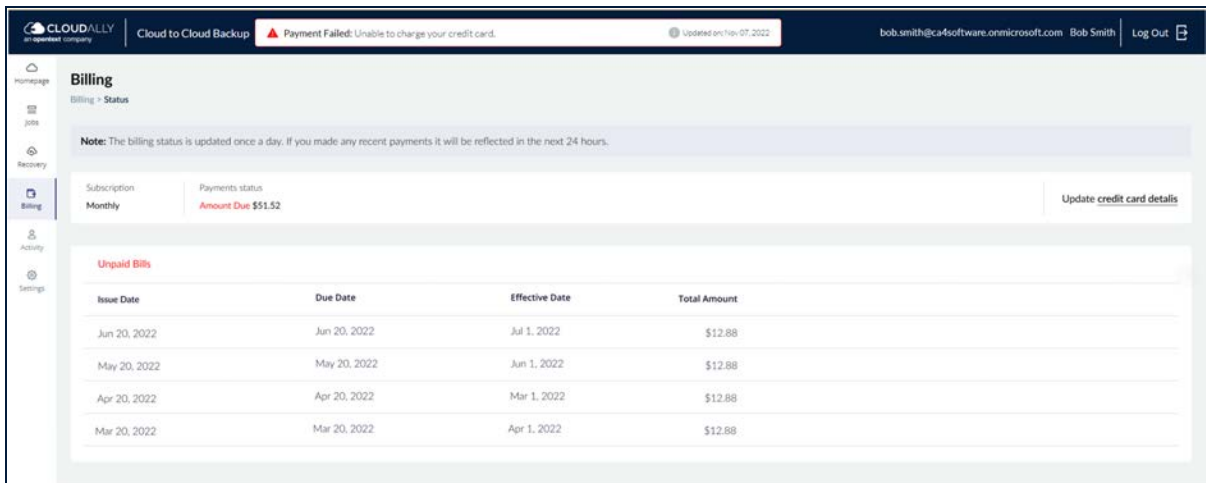


You can click **Pay Invoice**, and you will be directed to the following screen, where you can pay your invoice via PayPal or by credit card:



## Monthly

Similarly, if there was a problem with your monthly subscription payment, the status will look as follows:

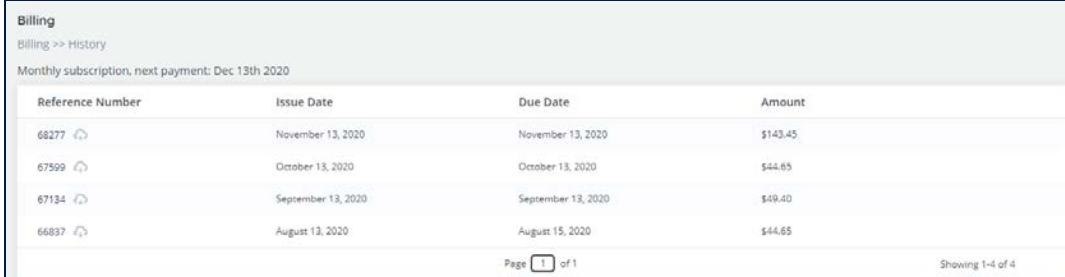


From here, click **Update credit card details** and provide the new information.







## 8.4 History

This page displays the history of payments.



The screenshot shows a 'Billing' section with a 'History' link. Below the link, it states 'Monthly subscription, next payment: Dec 13th 2020'. A table lists four payment entries. Each entry has a reference number with a download icon, an issue date, a due date, and an amount. At the bottom of the table, it indicates 'Page 1 of 1' and 'Showing 1-4 of 4'.

Reference Number	Issue Date	Due Date	Amount
68277 	November 13, 2020	November 13, 2020	\$143.45
67599 	October 13, 2020	October 13, 2020	\$44.65
67134 	September 13, 2020	September 13, 2020	\$48.40
66837 	August 13, 2020	August 15, 2020	\$44.65

By clicking on the reference number, you can download the receipt, which provides details about the number of backed-up accounts or the amount of stored data, and the total amount paid. It also displays the payment method used.

An example of a receipt is displayed below.



To: pizza-perfecto.com – PPV001

CloudAlly Ltd.

Pizza Perfecto Ltd  
18 Mozarella Lane  
United Kingdom ID 307 123 08

Tax ID: 514596667  
12 Harimon st., Gan Hayyim 4491000,  
Israel  
www.cloudally.com  
accounting@cloudally.com

### Invoice / Receipt 51646

26 Apr 2021

Certified Copy

Invoice / Receipt for admin@pizza-perfecto.com, 1 year backup starting April 22, 2021, GBP

QTY	Description	Price	Total
70	Dropbox 696.56 GB	16.25 GBP	1,137.50 GBP
	Subtotal		1,137.50 GBP
	VAT 0%		0.00 GBP
	Total payable		<b>1,137.50 GBP</b>

#### Payments Details

Type	Description	Date	Amount
PayPal	Account 12345678 / Transaction # 987654321	26 April 2021	1,137.50 GBP

Total **1,137,50 GBP**

\*  
Invoice / Receipt for Proforma Invoice 11392  
Paid with PayPal  
Merchant Account: KQMTW2PHR5CUG

Signature: CloudAlly Ltd  
c.n 514596667 

**Secured Electronic Signature**  
Digital Document Signed by **Green Invoice #**

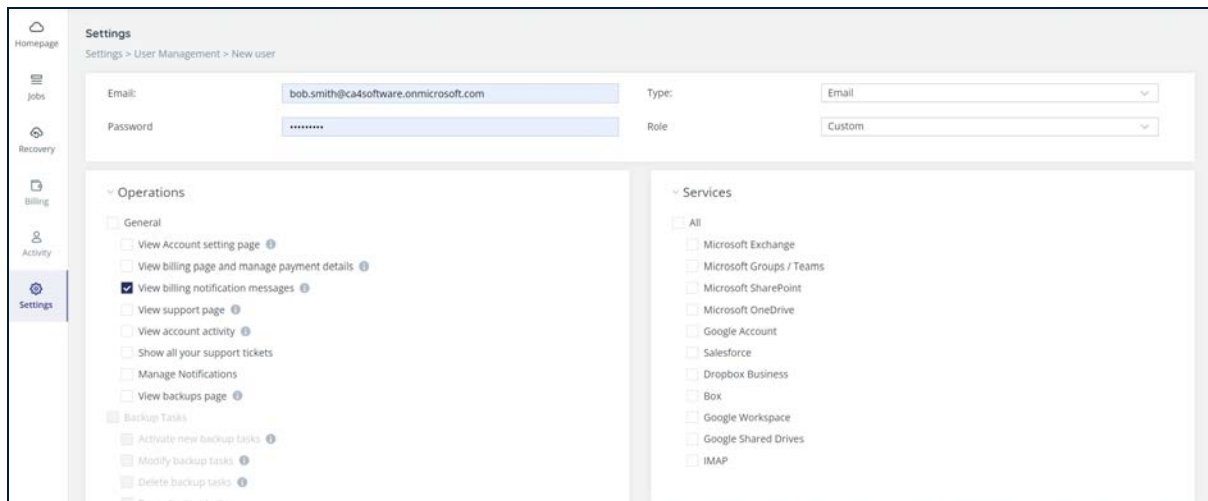
Created 26/04/2021 16:29 | Invoice / Receipt 51646 | page 1 of 1

## 8.5 Billing Notification Messages

Administrators can define whether individual users will see the Billing Notification Messages on their screens (e.g., Payment Due, Payment Overdue, Payment Failed).

**To turn notifications on or off:**

1. From the Navigation Panel, click **Settings > User Management**.
2. For an existing user, click the pencil icon next to the user's name.  
For a new user, the notification options will appear when you define the new user's details.
3. Click **View billing notification messages** on or off.



## 9 Helpful Resources

### 9.1 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.

### 9.2 Knowledge Base

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

### 9.3 Support

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

### 9.4 Privacy

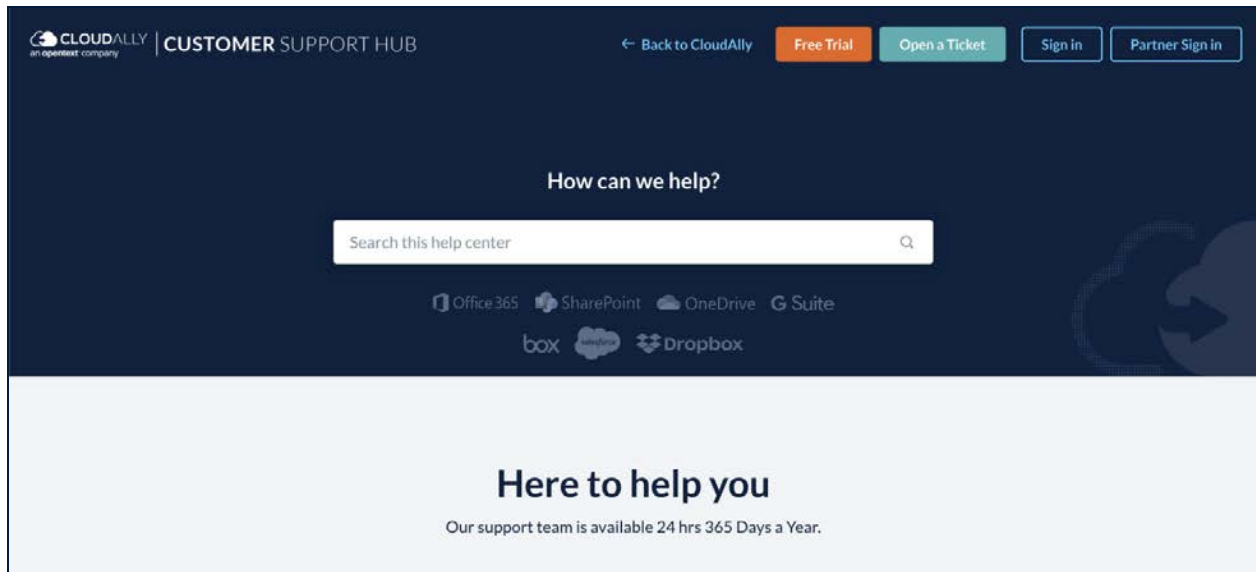
CloudAlly takes privacy seriously. Read our Privacy Policy at <https://www.cloudally.com/privacy-policy>

### 9.5 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/>

## 10 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](mailto:Info@cloudally.com)


Customer Support: [Support@cloudally.com](mailto:Support@cloudally.com)

Sales: [Sales@cloudally.com](mailto: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