User Guide

Dropbox

Backup & Recovery

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1   Preface

1.1   About this Guide

Thank you for selecting CloudAlly Backup for Dropbox. Relax! All your data is now securely protected with easy recovery from data loss. CloudAlly comprehensively backs up your Dropbox 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 Backup 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 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 Backup for Dropbox.

1.3   What's in this Guide

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

- Creating and Accessing Your CloudAlly Account
- Backing Up Your Data
- Recovering Your Backed Up Data
- Filtering and Viewing Drilldown Details
- Managing Your Account
- Managing Subscriptions and Payments

2   Creating and Accessing Your CloudAlly Account

2.1   Prerequisites

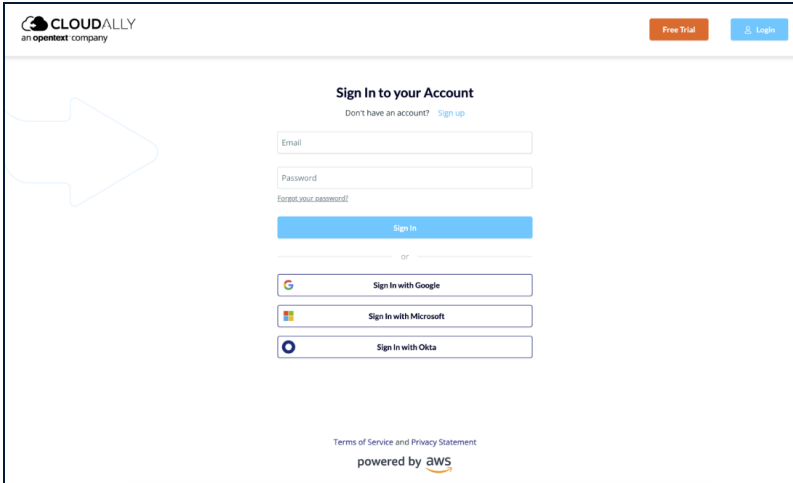To administer the CloudAlly Backup for Dropbox environment, the following is required:

- CloudAlly Backup for Dropbox subscription

2.2   Sign Up/Sign In from the CloudAlly Home Page

1. In your Internet browser, open cloudally.com and click **Login**.
2. Click **Customers**. The *Sign In* page is displayed.

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

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

> **Note:** CloudAlly Backup gives you the choice of 7 AWS data centers available in the dropdown menu "Location." These include locations in Australia, Canada, EU (France, Germany, and Ireland), US, UK, 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 for more information.
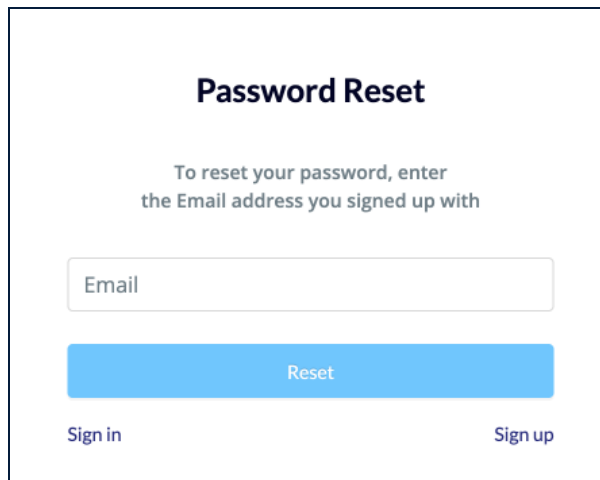
5. Your trial account is created, and an email containing your activation link is sent to your email address. Click on the activation link contained in the email you received to activate your account. If you sign up with Google, Azure, or Okta, the activation link will not be sent to you.

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 CloudAlly Account.

You can also enable Two-Factor authentication to provide additional security. For more information, see Managing Your Account .
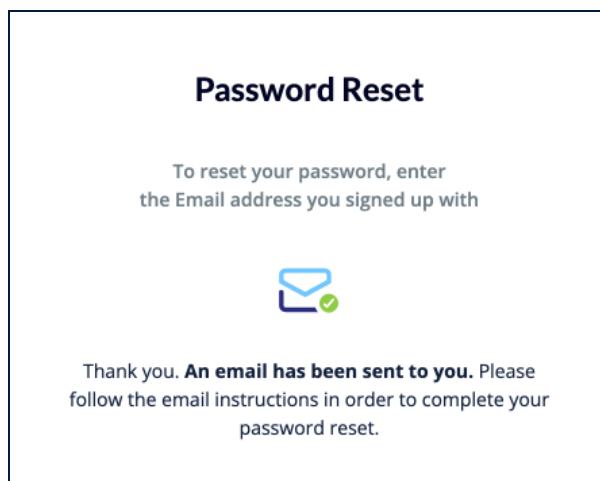
2.3   Resetting Your Password

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

1. Click **Forgot Password?** to start the process of resetting your password. 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

2. In the Email field, enter the email address that you used to sign up.
3. Click **Reset**, and the *Password Reset* window will appear.

Password Reset

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

Thank you. **An email has been sent to you.** Please
follow the email instructions in order to complete your
password reset.

The email will look as follows:
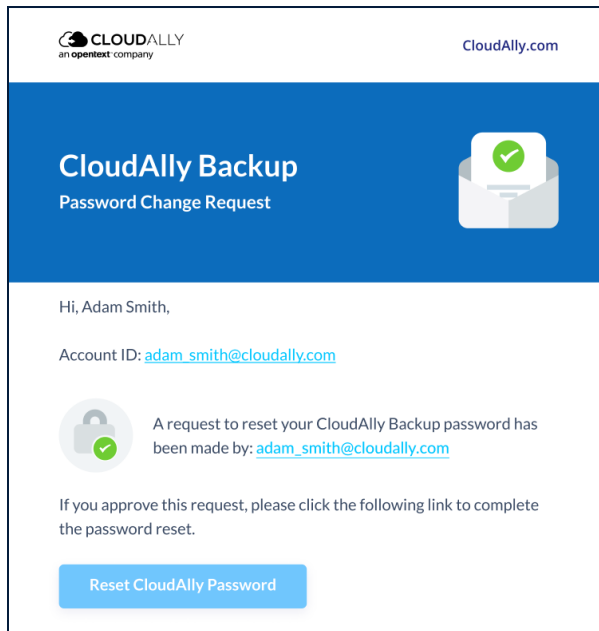
4. Click **Reset CloudAlly Password** to confirm the password reset, and the *Change Your Password* window will appear.
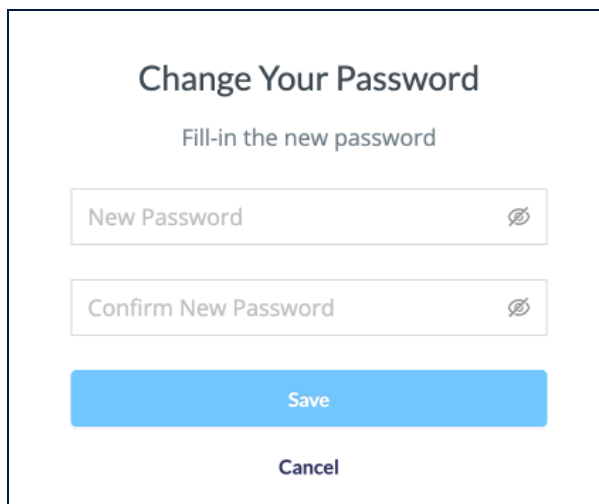
5. Enter your new password in the **New Password** field and again in the **Confirm New Password** field, and click **Save**.

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

3   Backing Up Your Dropbox Data

Dropbox 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 automated daily Dropbox backup service ensures that you can both quickly recover data from any point in time as well as export your archives for local storage.

CloudAlly's Dropbox service backs up data from files and folders.

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 Dropbox versions:

- Business Professional
- Business Standard
- Business Advanced

> **Note:**
> * Dropbox personal versions are not supported.
> * CloudAlly supports upgrading from Dropbox Standard and Advanced plans to Dropbox Professional.
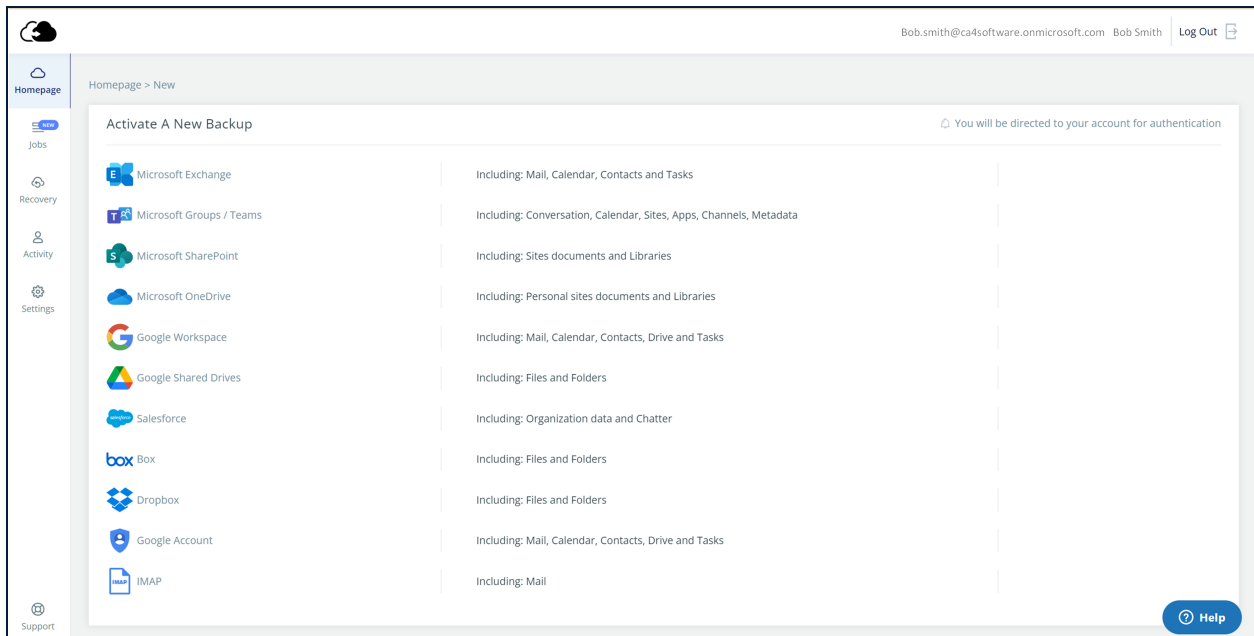> The backup history will be preserved and available for recovery.

3.2   Creating a New Backup Task

To create a new CloudAlly backup task:

1. Sign in to your CloudAlly Account, or if you are already signed in, click the **Homepage** option in the Navigation Panel.

2. On the Homepage, click **+ Add Backup Task**.
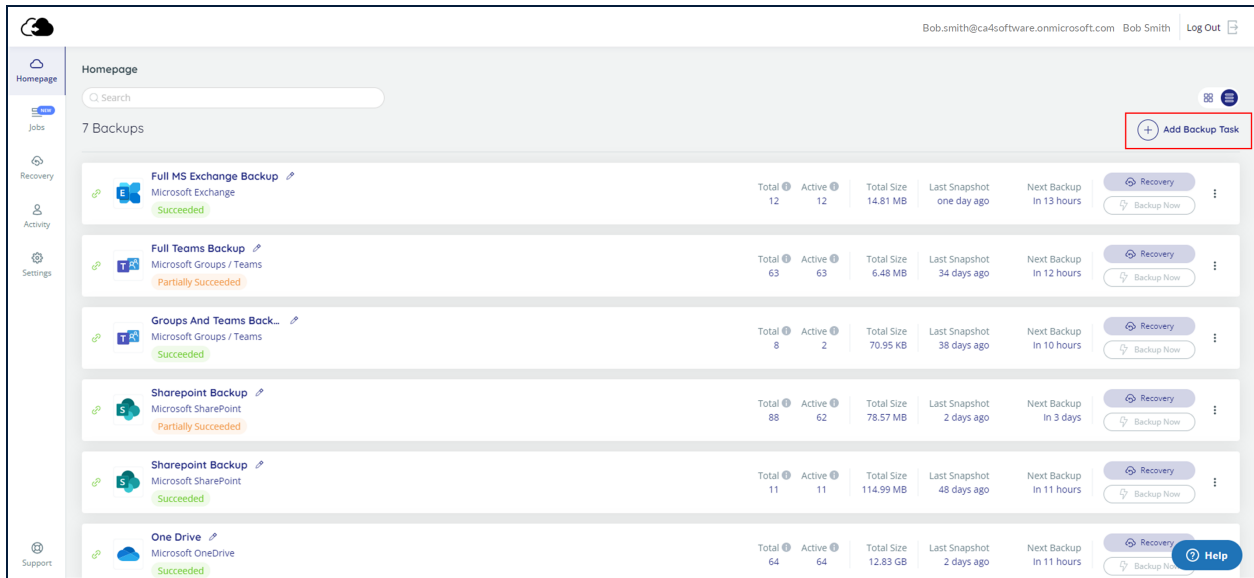
The *Activate A New Backup* page is displayed:

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

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 **Authentication**. You will be directed to the *Dropbox login* page, where you need to add your user name and password. Click **Sign In.**

6. You will be redirected to the *Backup Settings* page, where you can adjust the settings of the backup.
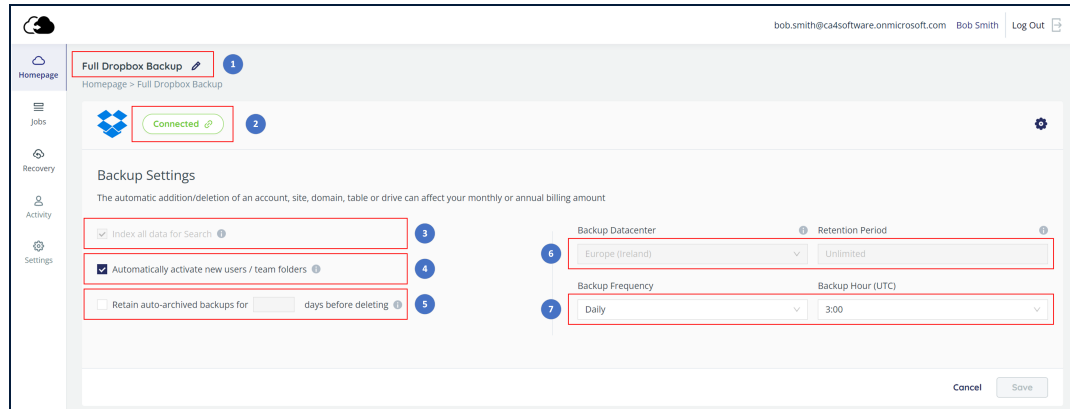

On this page, you can adjust the backup settings and activate backups for the Dropbox users. See the sections below for the detailed procedures.

3.3   Configuring Backup Settings

To access the configuration screen, click the settings ⚙ icon on the top right side of the screen.

This set of options on this screen enables you to select the backup settings for the User / Team Folder.

1. You can change the name of the backup task by clicking ✏ .

2. The icon to the right of the Dropbox logo displays whether the application was able to connect to the specified Dropbox 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 green Connected icon changes to the red 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.

4. The Automatically activate new User / Team Folders option instructs the system to detect new User / Team Folders, 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 submitting a support ticket. 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 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

   b. Click the drop-down list adjacent to the **Backup Hour (UTC)** field and select the backup hour. Click **Save**

> **Note:** Adding more frequent backups is possible via a support request.

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 bottom of the screen where all of your User / Team Folders are listed.
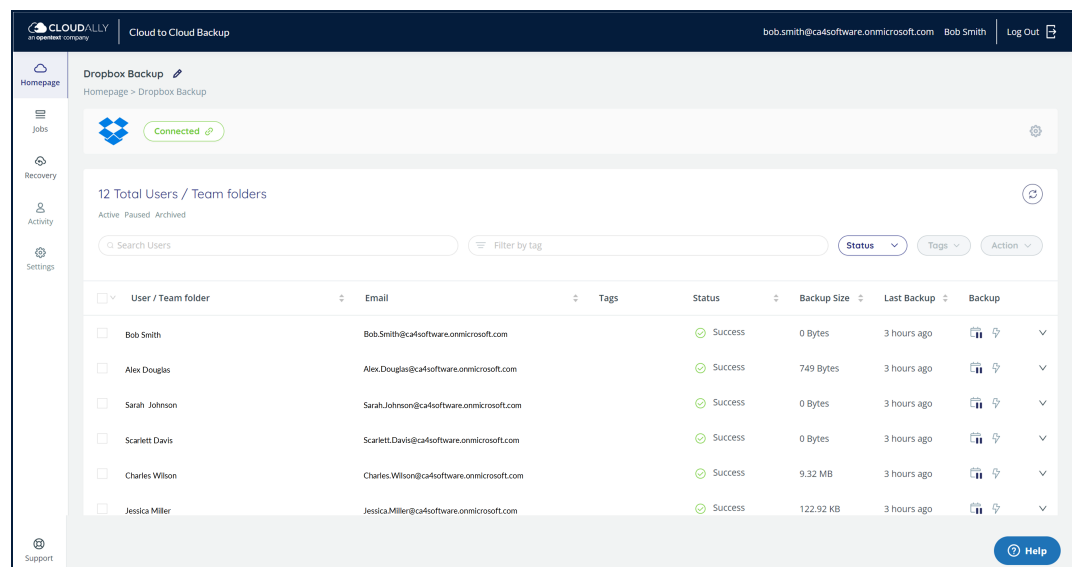
2. Select one or more User / Team Folder(s).

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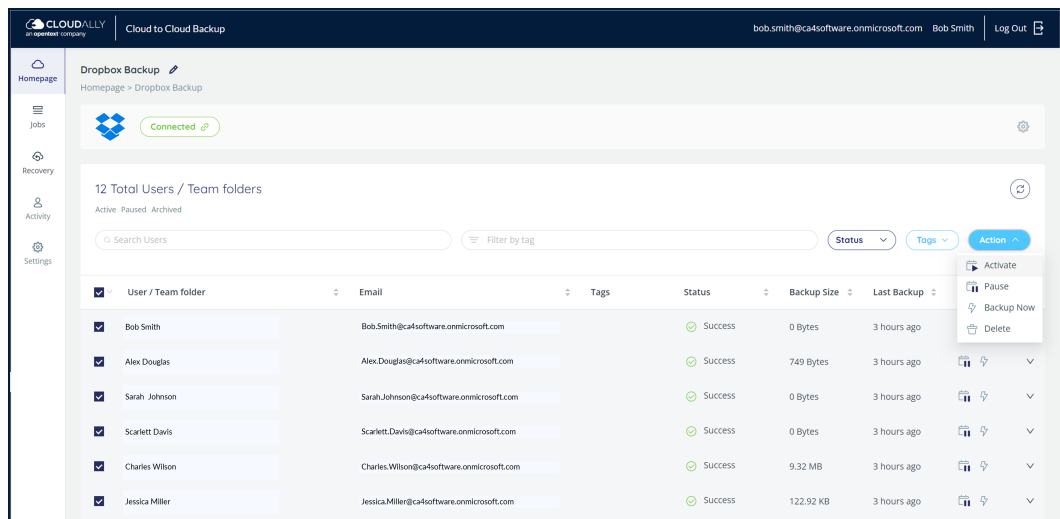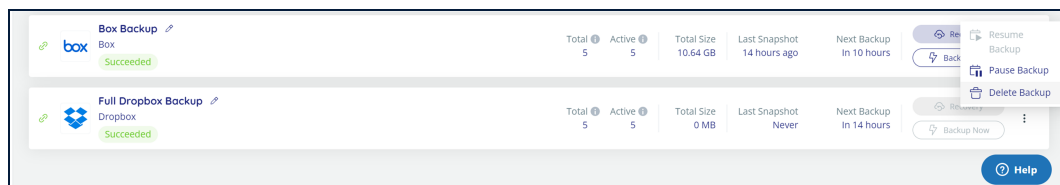
4. Alternatively, if you prefer to perform an immediate, on-demand backup, click **Action** > **Backup Now**.

3.5 Removing 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.

3.5.1 Removing 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.

Are you sure you wish to delete the backup task of
Dropbox / Bob.Smith@ca4software.onmicrosoft.com?

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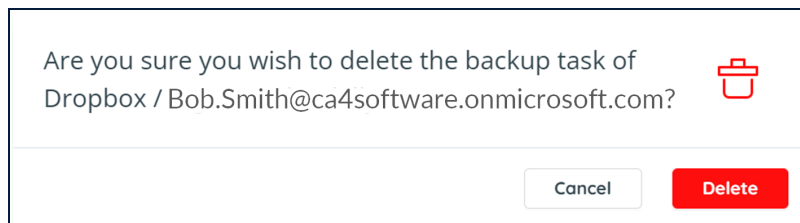
Click **Delete**. The selected backup service is removed from your account.

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

3.5.2   Removing an Individual User / Team Folder

To remove an individual User / Team Folder:

1. Click the backup service from which you want to remove the User / Team Folder. The backup task settings page is displayed.

2. Add a check next to the User / Team Folderthat you want to remove. Click **Delete** in the **Actions** menu.
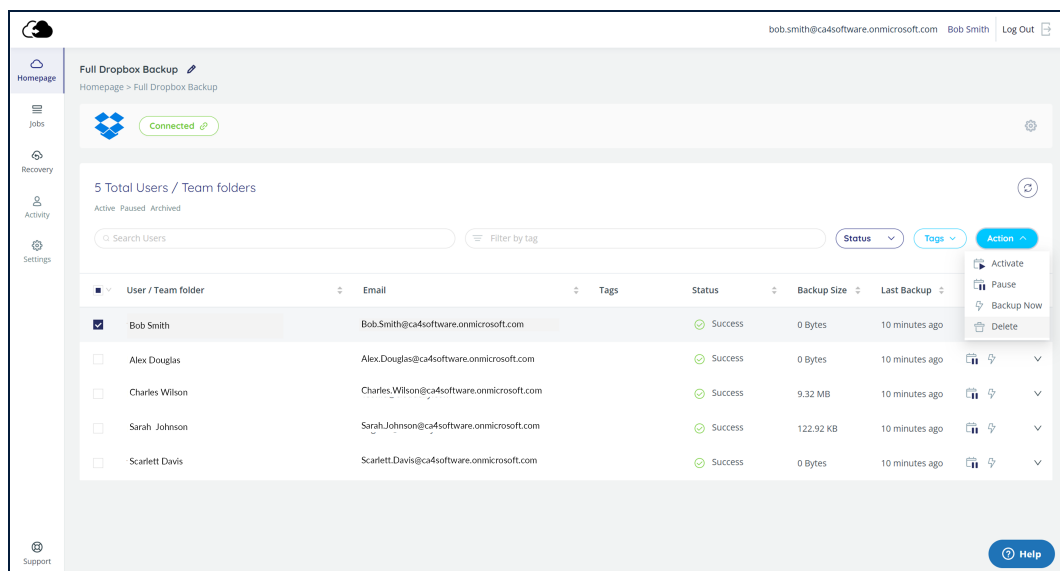
3. A pop-up window is displayed with a list of accounts selected for removal. Click **Delete**. The selected User / Team Folderare removed from your account.

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

3.6 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.
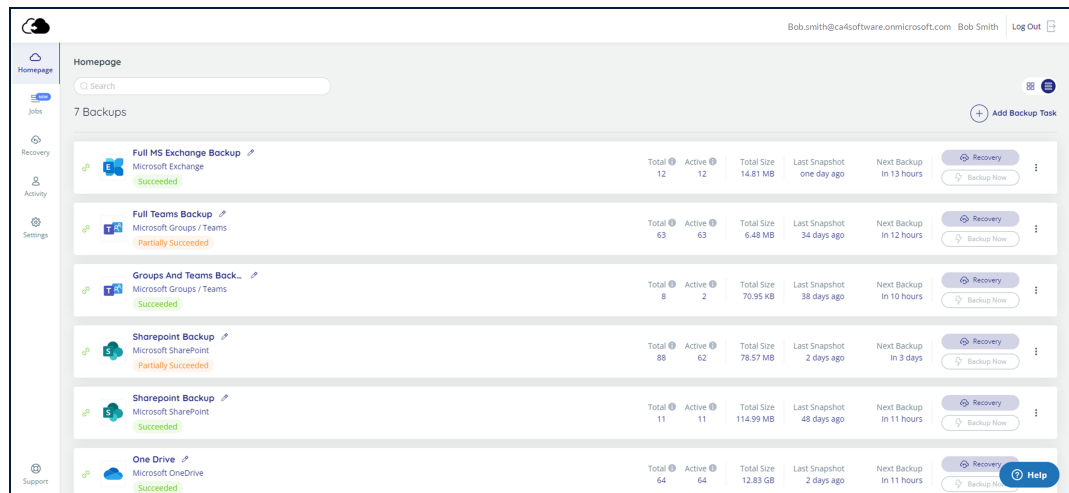
2. Click the Dropbox icon from the list or enter a keyword in the Search field to find a specific task. The *Dropbox Backup* page is displayed.

3. Click **Settings** ⚙ on the top-right section of the screen to see the backup settings.
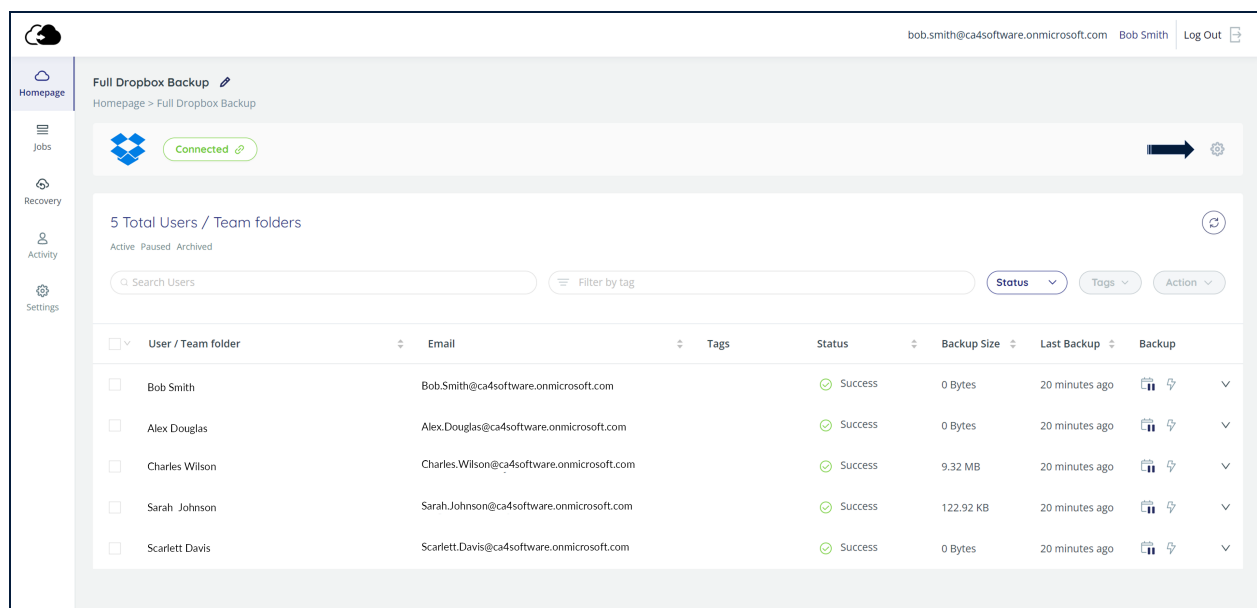
From here, it is possible to modify the fields described in <u>Configuring Backup Settings.</u>

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 / Team Folder 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.

Restore & Download

Active Backup Accounts

Search

Microsoft Groups / Teams | 1 group / team test		>
Microsoft OneDrive | 18 sites Test		>
Microsoft Exchange | 30 accounts Test		>
Box | 8 accounts Test		>
Google Workspace | 3 google accounts cloudrein.com		>
Microsoft SharePoint | 13 sites Test		>
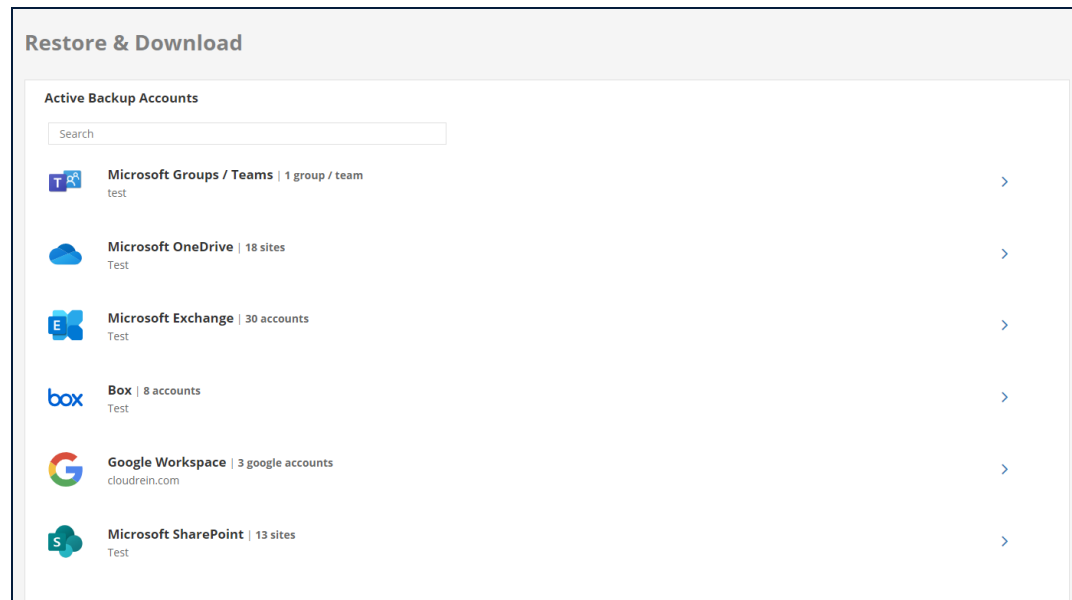
2. Click the Dropbox backup task from which you wish to recover the data.
3. The *Restore or Download Dropbox* page is displayed.

This page displays all your Dropbox domains backed up with the details such as User / Team Folder 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 / Team Folder name.

- Click the arrow icon at the end of the line of the User / Team Folder which you want to restore or export (download).

The *Restore or download Dropbox* page is displayed.

- Select the radio button for your preferred restore method:

    - Via Snapshot (see <u>Via Snapshot)</u>

    - Via Item Search (see <u>Via Item Search</u>)

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.
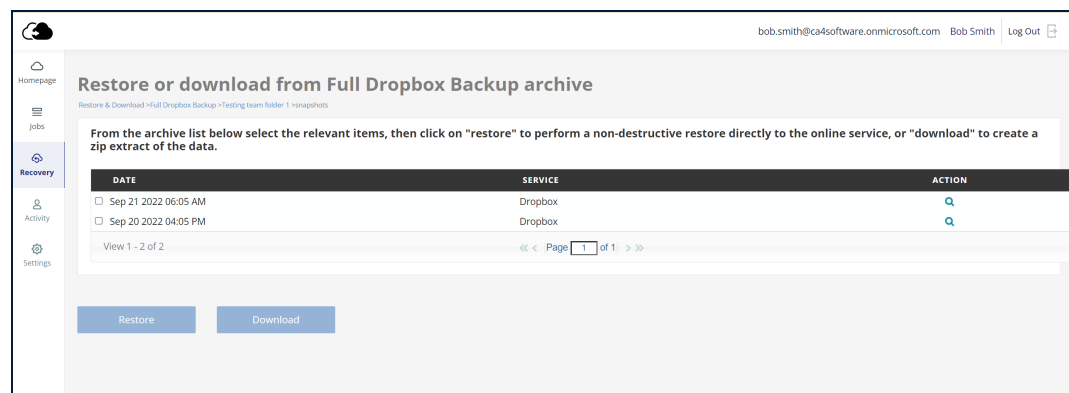
3. Alternatively, you can click Q in the Action column to drill down into the snapshot and view the structure of the backed up data. There you can select one or more items for recovery.

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 with a blue label indicating that they have been restored?

- ▪ Or do you want to perform an in-place restore, where the restored files will be in the same folder as the original files, and any existing information will be duplicated - it will not be over-written.

> **Note:** Dropbox limits the API calls used in our restore process to 1,000,000 per month for many of their business plans. Once the limit is reached, no other items can be restored / uploaded to Dropbox until the following month. You can still export and download backup data for recovery purposes, and then upload to Dropbox with the native application. Please contact DropBox directly if you have any questions about your API limits.

Please confirm the restore request   ✕

You are about to restore items from the archive of **Testing team folder 1**

Restore to   Testing team folder 1

*You can restore the data to a different account.

Please select your restore method:

🔘 Non-destructive: Data will be restored to a new folder.
⚪ In-Place: Restore will be performed to the original folder. Existing data will be duplicated.

A confirmation Email will be sent to you upon completion.

Dropbox limits the API calls used in our restore process to 1,000,000 per month for many of their business plans. Once the limit is reached, no other items can be restored / uploaded to Dropbox until the following month. You can still export and download backup data for recovery purposes, and then upload to Dropbox with the native application. Please contact DropBox directly if you have any questions about your API limits.

Cancel   OK

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:
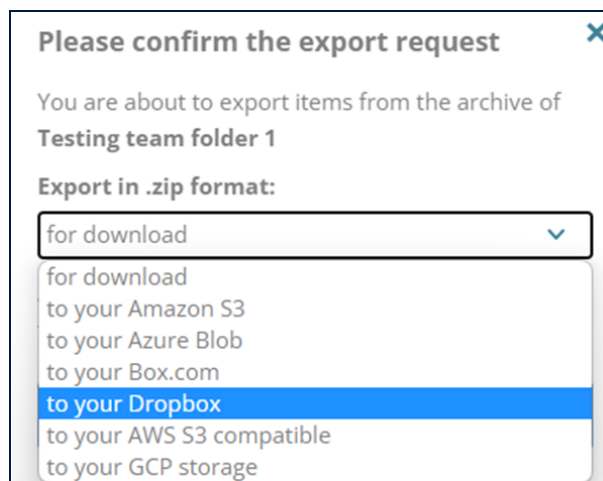
3. If you select options other than "for download," you may be asked for additional credentials and/or access tokens for the selected storage locations.

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.
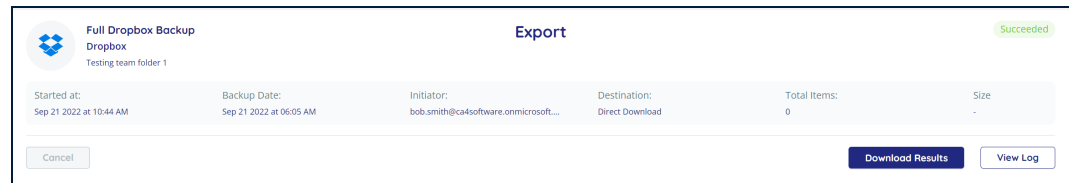
6. Click **Download Results**, and a page will open, where you can access your backup file.
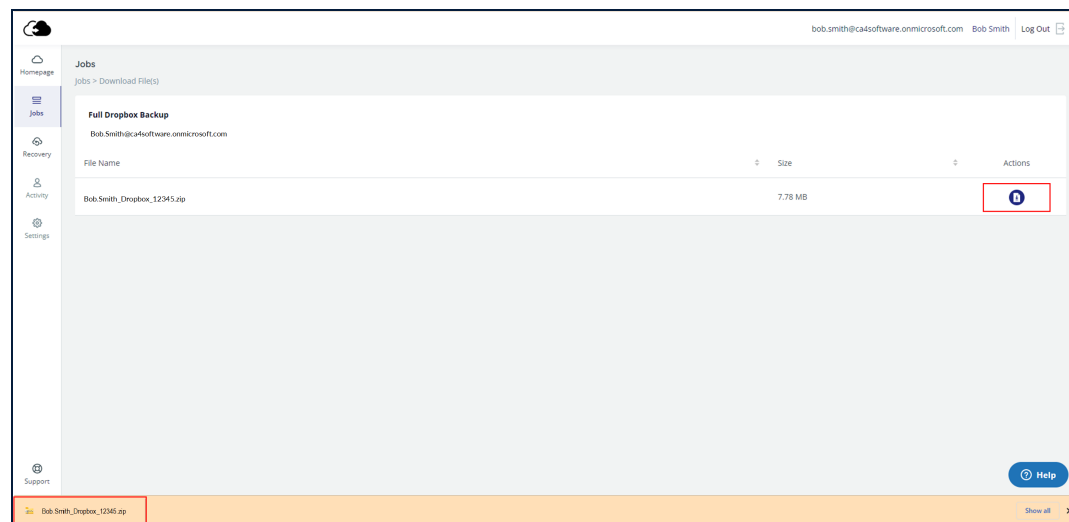
4.1.2   Restore or Download Via Item Search

1. Select **Via Item Search**, and enter a word or phrase to search on.

2. Or, click the arrow ⌄ to the right of the search bar, and enter search criterion in any of the Advanced fields: Author, file name or date.
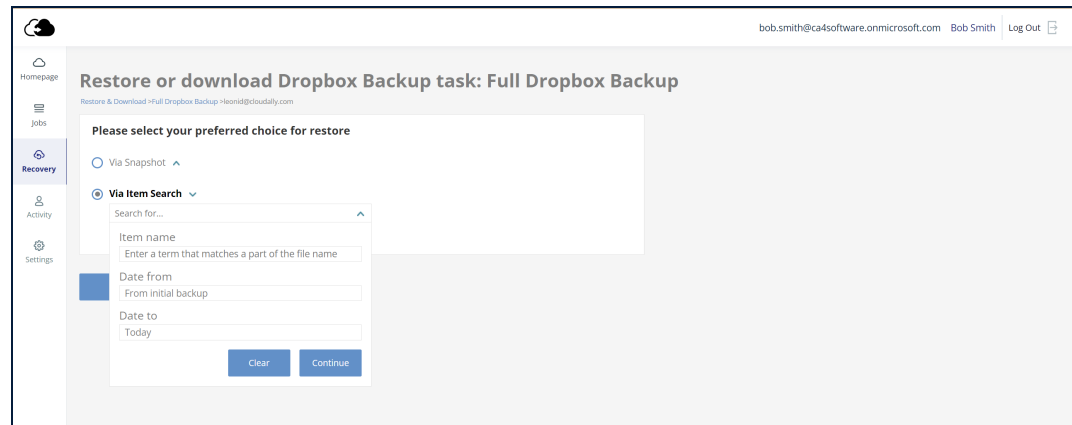
3. Click **Continue**. The *Restore or download* page is displayed, showing the search results with details such as . The details columns are different for different types of restored items.

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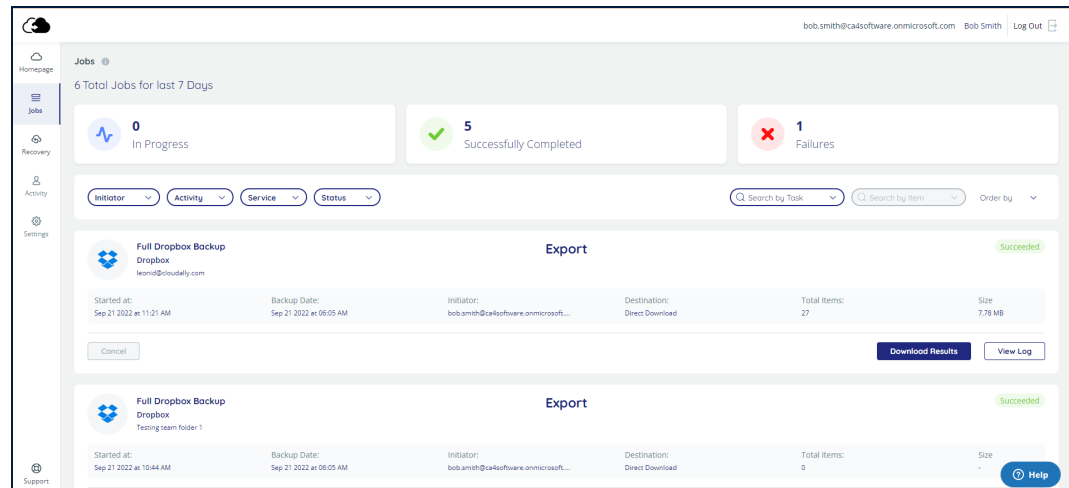
To see a list of jobs that have any of these 3 statuses, click on the status, and your results will be filtered accordingly

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:

  - Microsoft Exchange
  - Microsoft SharePoint
  - Microsoft Groups / Teams
  - Microsoft OneDrive
  - Google Workspace
  - Google Shared Drives
  - Salesforce
  - Box
  - Dropbox
  - Google Account
  - IMAP

- **Status**: Filter by one of the following:

  - In progress

  - Succeeded

  - Partially succeeded

  - Failed

  - Pending

  - Canceled

- **Search by Task**: Filter by a task, such as:

  - MS Exchange

  - Teams/Groups

  - One Drive

  - Sharepoint

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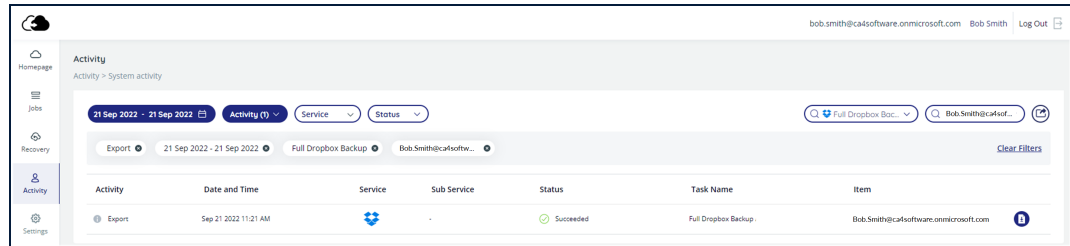
This page enables you to filter and search the list of backup tasks, export the list as a CSV file, and view more details on any backup task.

The latter can be achieved by clicking ⊙ 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:
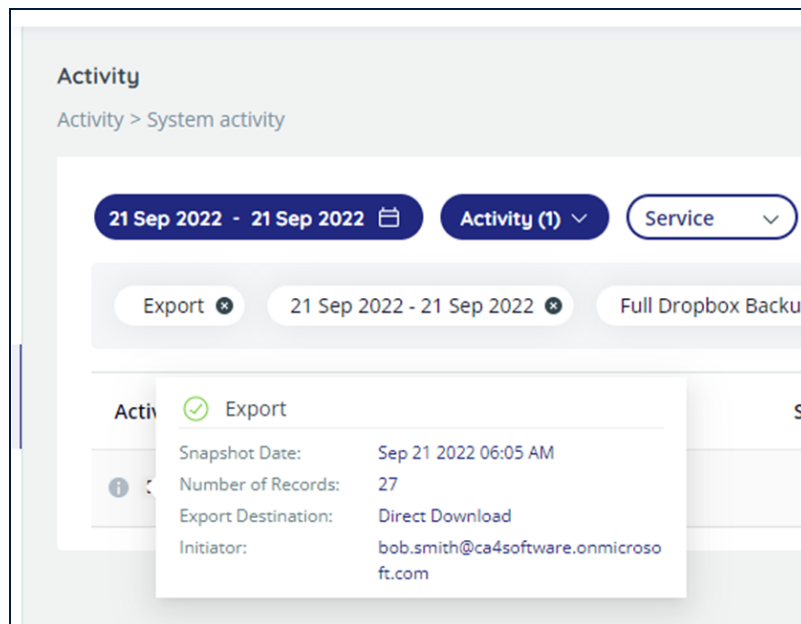
5   Managing Your Account

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

5.1   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.
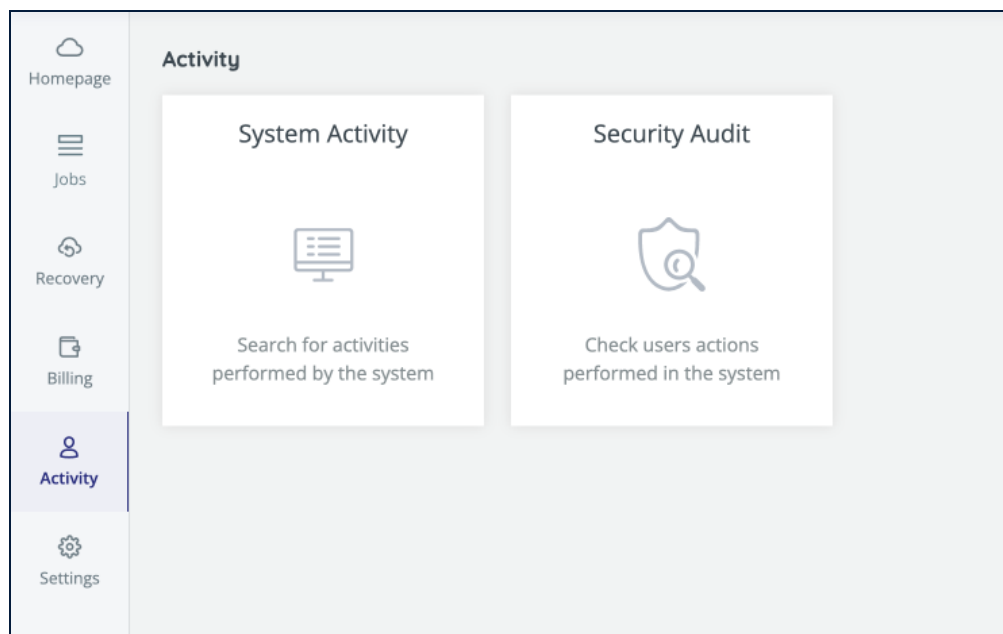
5.1.1   System Activity

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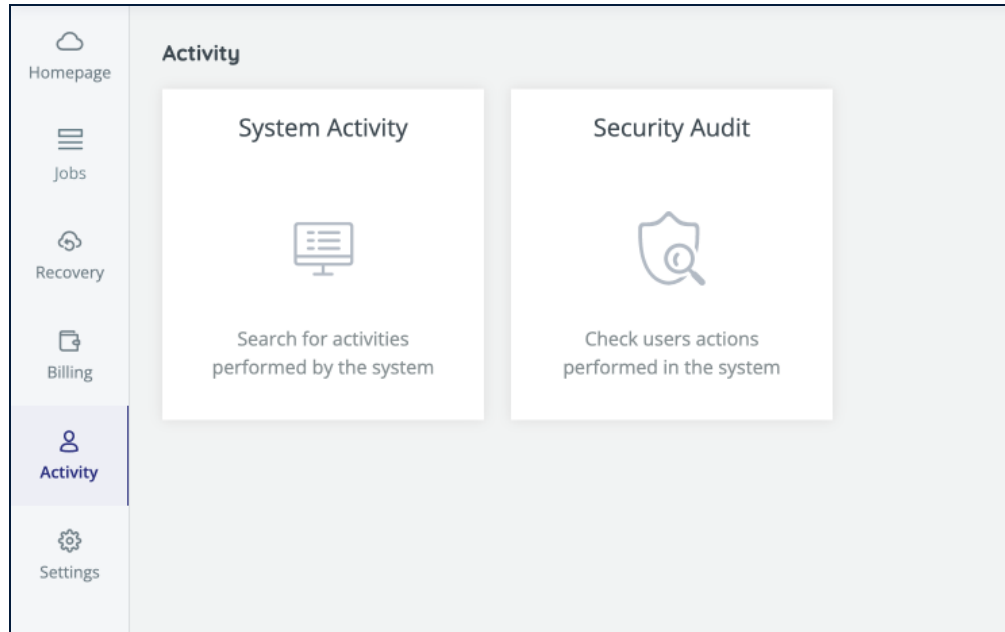
The *System Activity* page displays your account activity, with details such as Activity, Date and Time, Service, Sub-Service, Status, Task Name, and Item.

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 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:
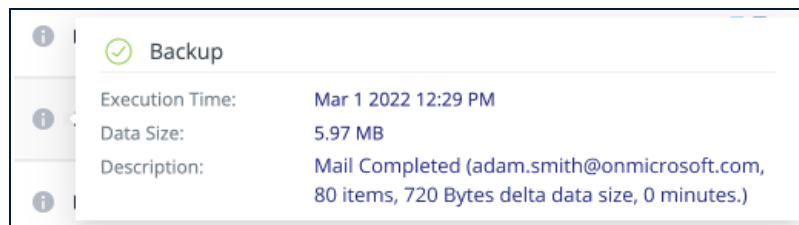
5.1.2   Security Audit

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.

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

5.2   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.
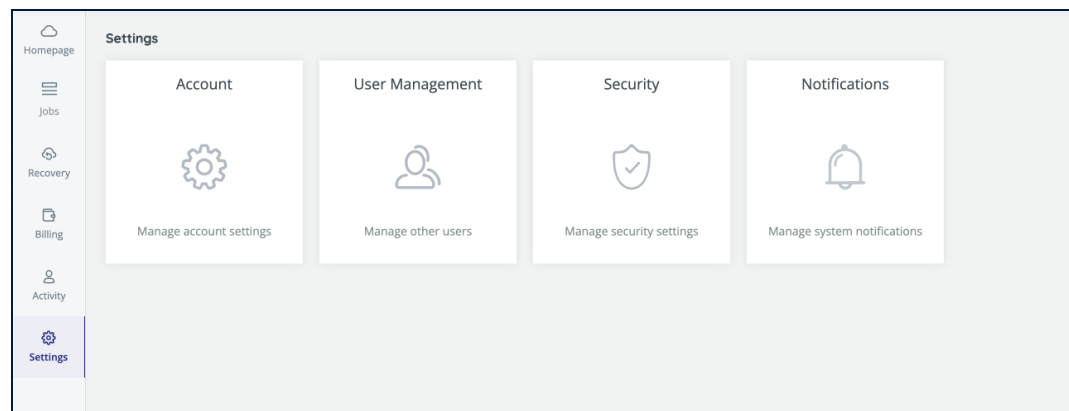
5.2.1   Account Settings

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.

1. You can update the Account Name and/or Email.

2. Click **SAVE**.

5.2.2   Canceling Your CloudAlly Subscription

To cancel your subscription:

1. Select the check adjacent to the "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.

> **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, data from all your backups will be deleted.

5.3   User Management

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

Click **+ Add new user** to create a new user and start the configuration procedure for that user, or ✎ to edit an existing user's settings. The settings include the operations permitted to the user and the list of available services:

> **Note:**   Selecting the role "Administrator" enables permissions to all services and operations.

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

5.4   Security Settings

The *Security Settings* page enables you to:

- Update your password
- Set up two-factor authentication

The bottom section allows you to 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.

5.4.1 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.

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.

5.4.2   **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.
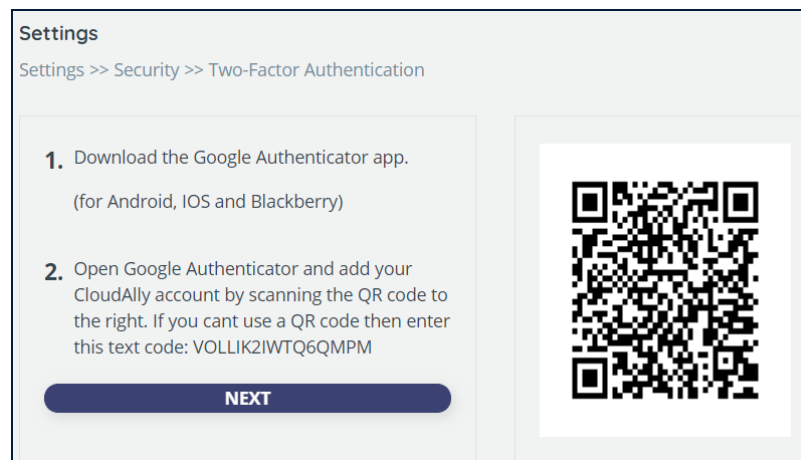
7. Download an Authenticator app, depending on your platform.
8. Open the Authenticator app and add your account by scanning the QR code provided in the web application.
9. If you cannot use a QR code, then enter the text code provided in the web application.
10. A six-digit code is generated.
11. Click **NEXT**.
12. Enter the 6-digit code that the application generated.
13. 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.

5.4.3   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.

To set up Okta:

1. On the **Settings** > **Security** > **SAML** tab, add the URL to the SAML Identity Provider Metadata file.
2. Or, you can upload the file itself.
3. Click **Activate**.
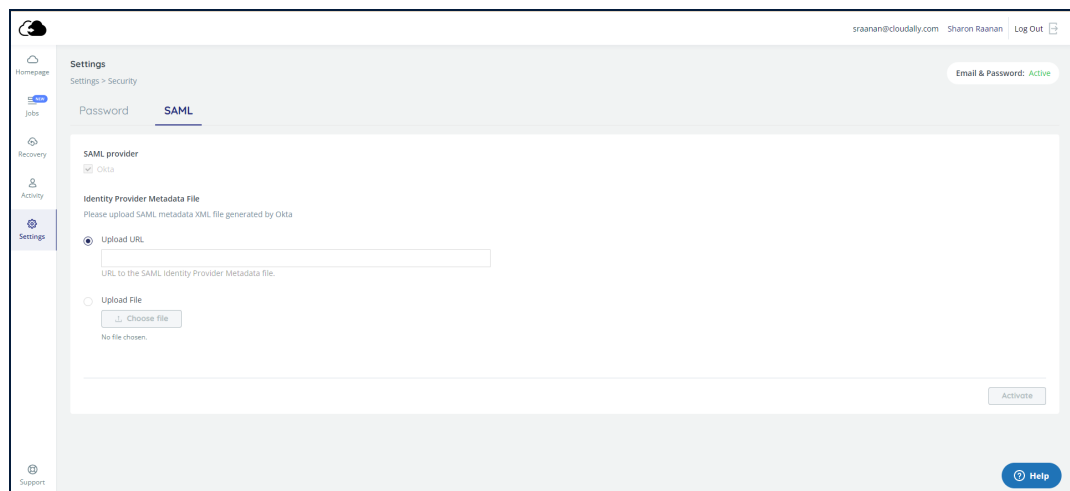
For further instructions, see the [CloudAlly Okta User Guide](#).

5.4.4   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 CloudAlly account, first create the list of trusted IP addresses.

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

1. In the *Settings* panel, click **Security**, and then **IP Restrictions**.
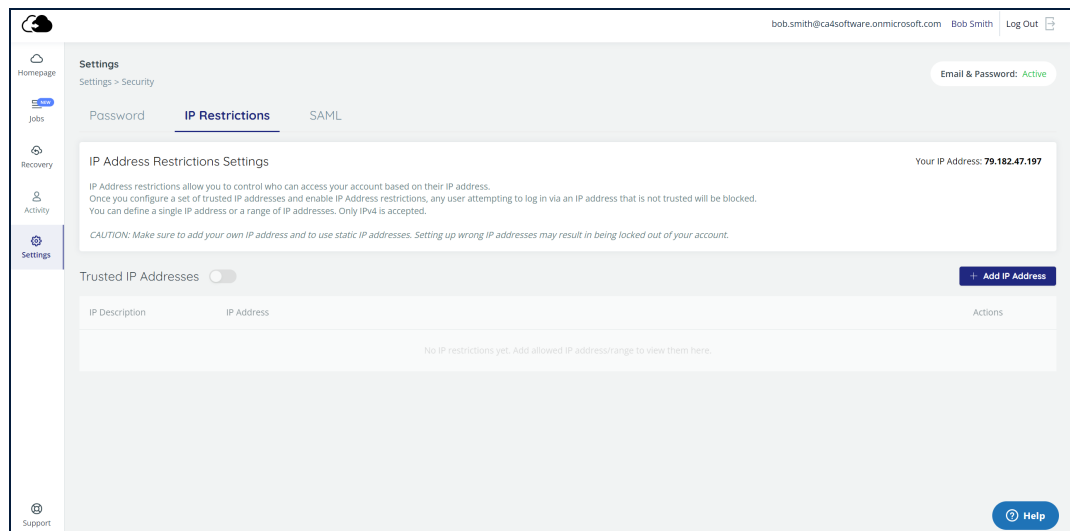
2. Click **+ Add IP Address.**
3. Enter one or more IP addresses:

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

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

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.
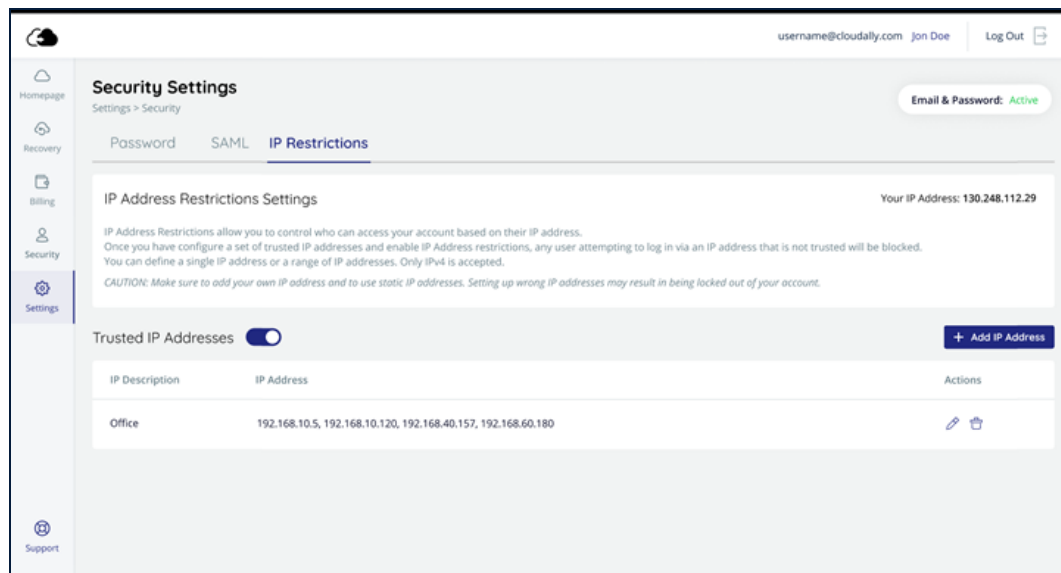
You can edit your list of addresses by clicking ✎, or delete ones that you no longer want on your trusted list by clicking 🗑.

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

Your 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:
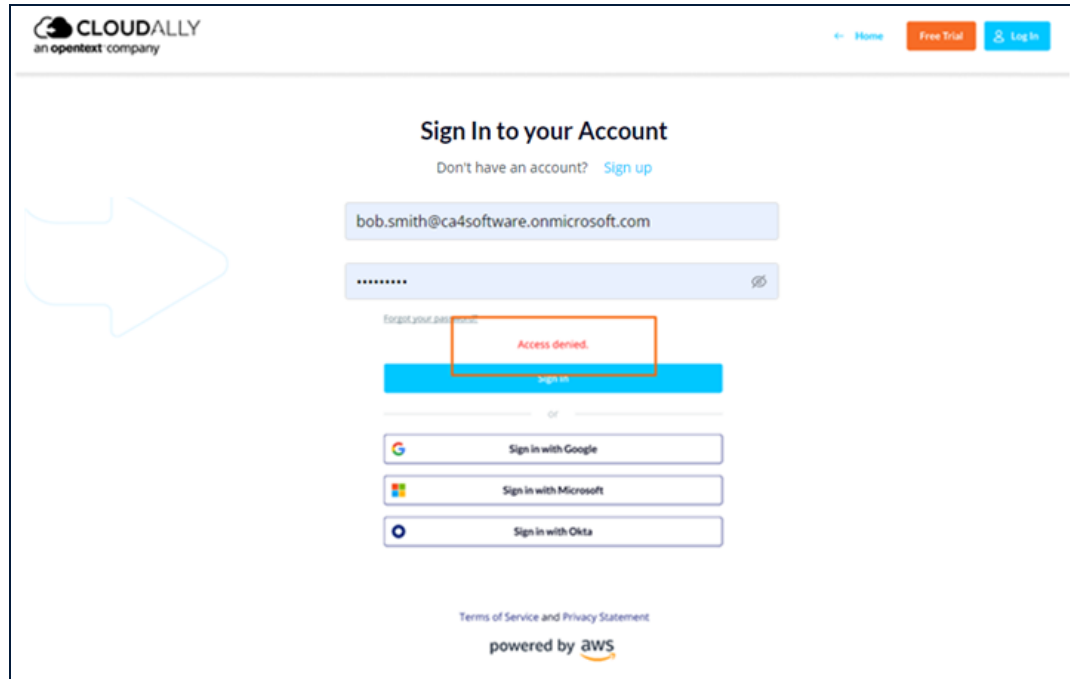
5.4.5   Email Notifications

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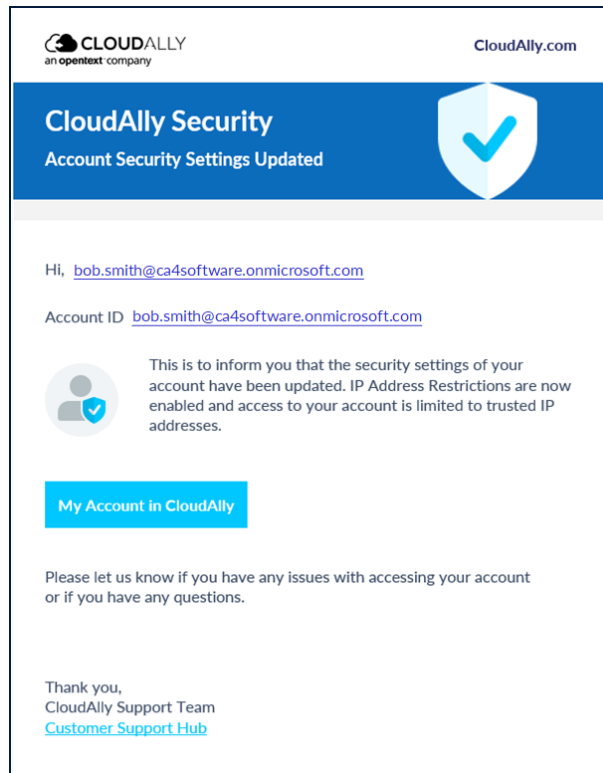
5.5   Notifications Settings

This menu option enables you to manage your system notifications.

From the Navigation Panel, click **Settings** > **Notifications**.
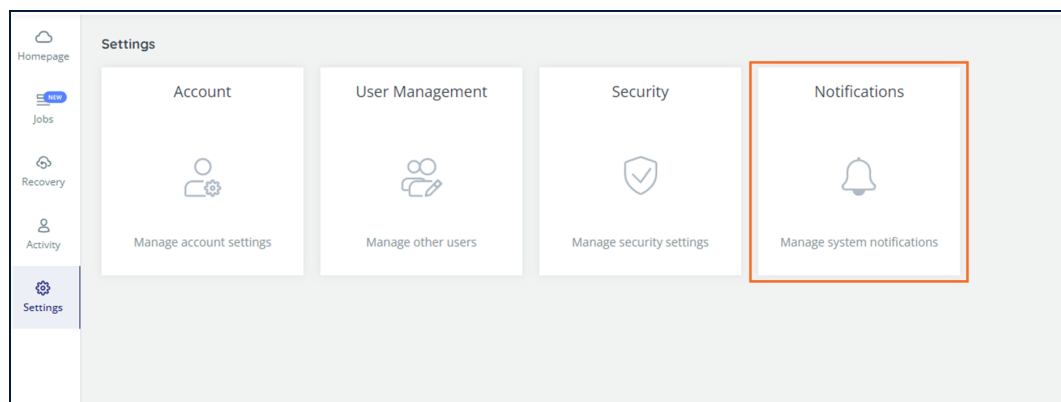
The following screen will appear:
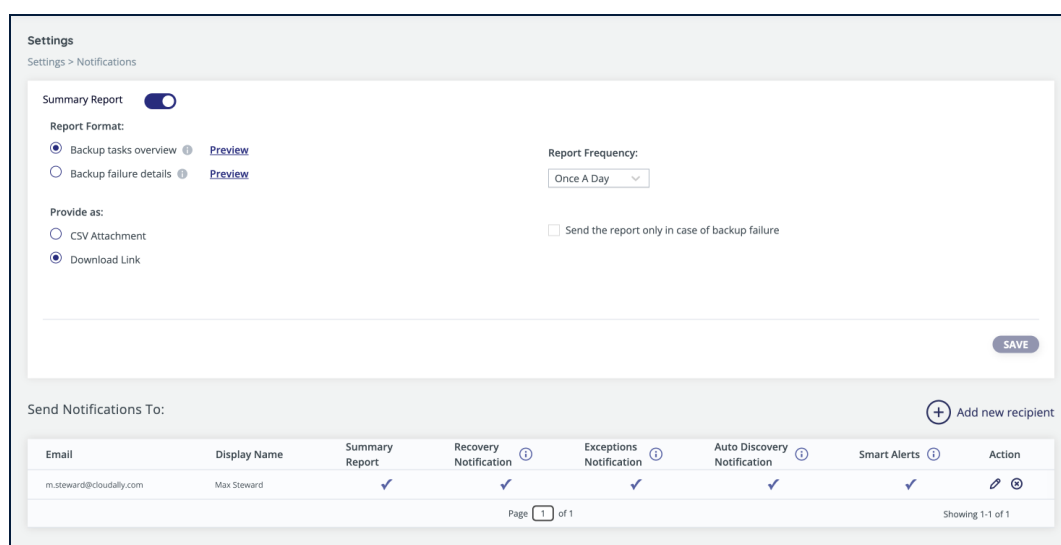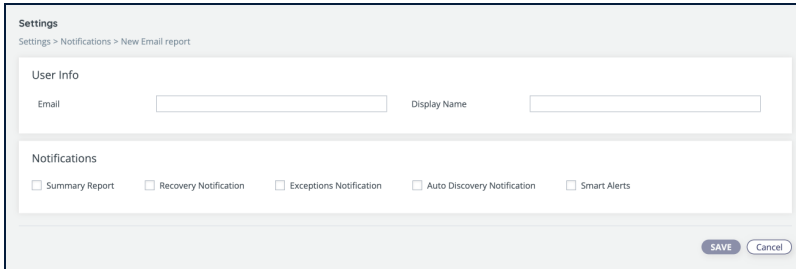
The top of the screen enables you to configure the following options:

- 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. You may need to scroll to the bottom of the page to find **SAVE**.

5.5.1

6   Managing Subscriptions and Payments

6.1   Subscribing to CloudAlly

Once the trial period has ended, you need to subscribe to the CloudAlly service 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.
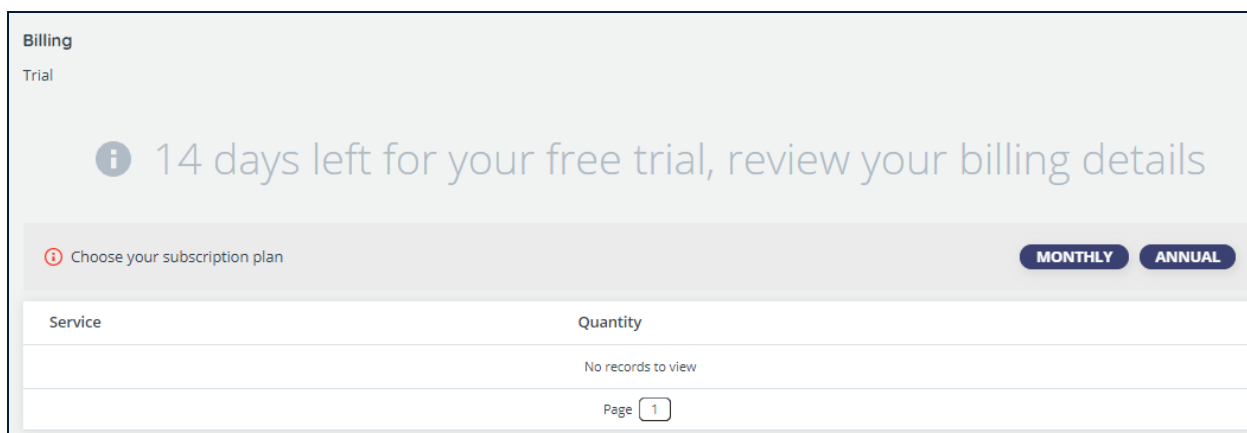
The *Review Billing* page is displayed with the option to select either **MONTHLY** or **ANNUAL** billing options.

> **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.

6.1.1   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. After you are charged each month, a receipt will be emailed to you.

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 payment status is updated every 24 hours, so if you update your credit card details but the reminder is still there, check again tomorrow.

> **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.

6.1.2   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 payment status is updated every 24 hours, so if you update your credit card details but the reminder is still there, check again tomorrow.

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.

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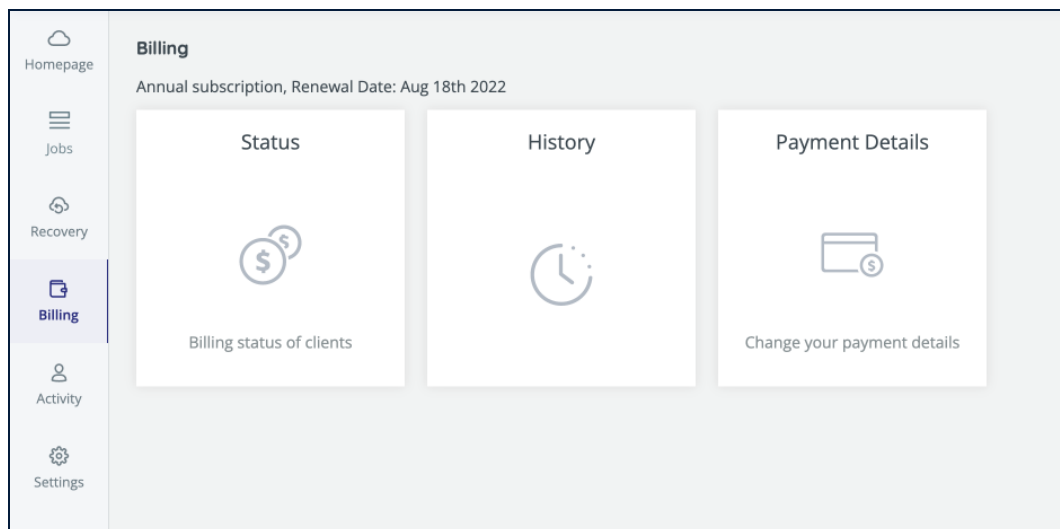
The *Payment Details* page contains the information used for billing.

6.2.1   Monthly Subscriptions

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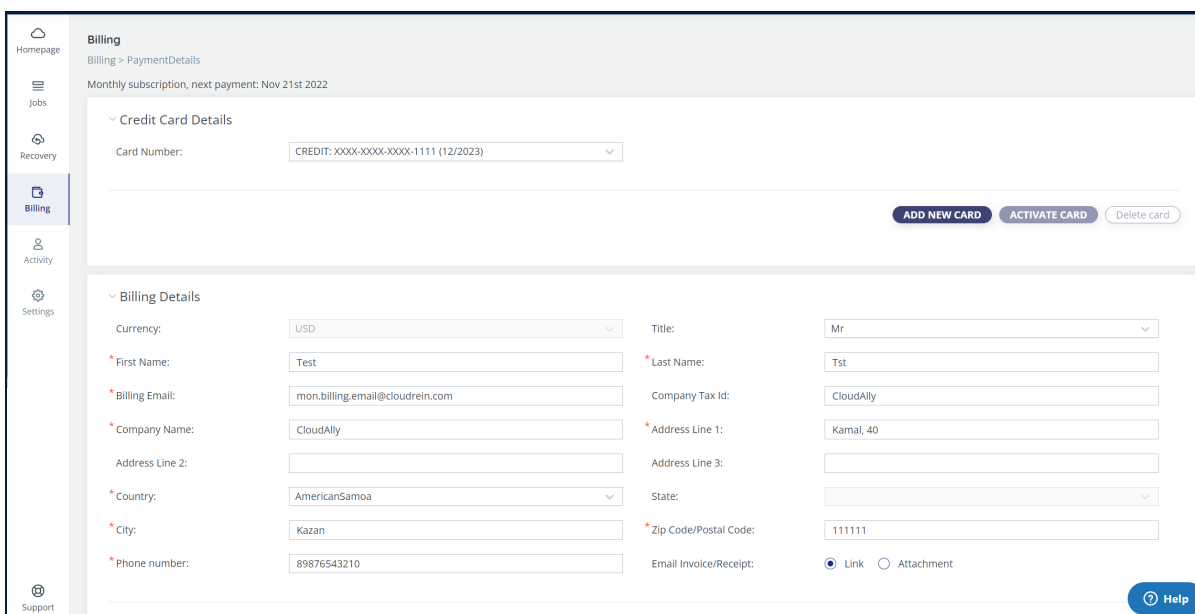
6.2.1.1   Add New Card

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

To create a new payment method:
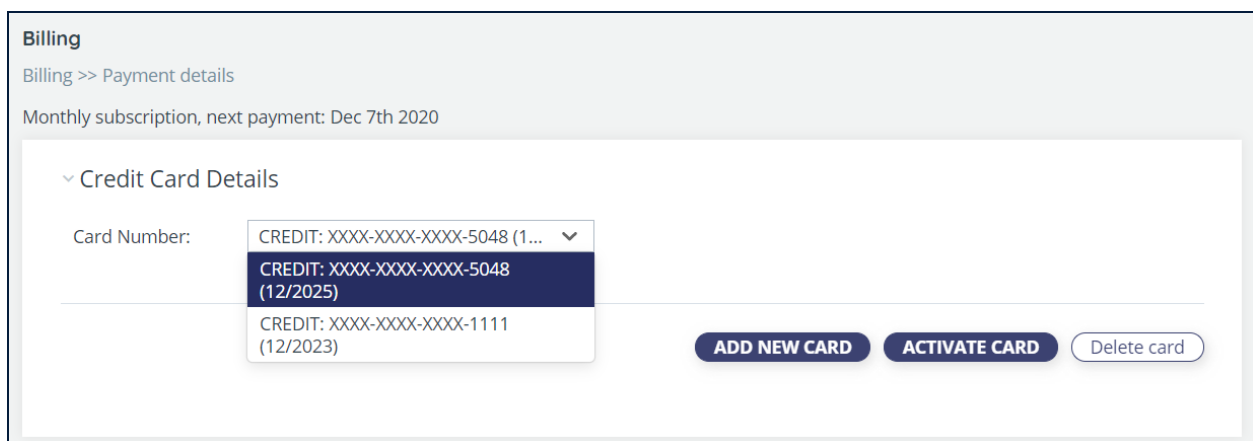
1. Click **ADD NEW CARD.**
2. Enter the card details such as Card Number, CVV, Card holder's name, and card expiry date.
3. Click **ADD NEW CARD**.

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

6.2.1.2   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. Scroll down for 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.

5. Update the required fields. The fields marked with the * symbol are mandatory.

6. Click **UPDATE BILLING DETAILS**.

7. The updates are saved.

At the bottom of the page, 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.

6.2.2   Annual Subscriptions

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

6.3   Billing Status

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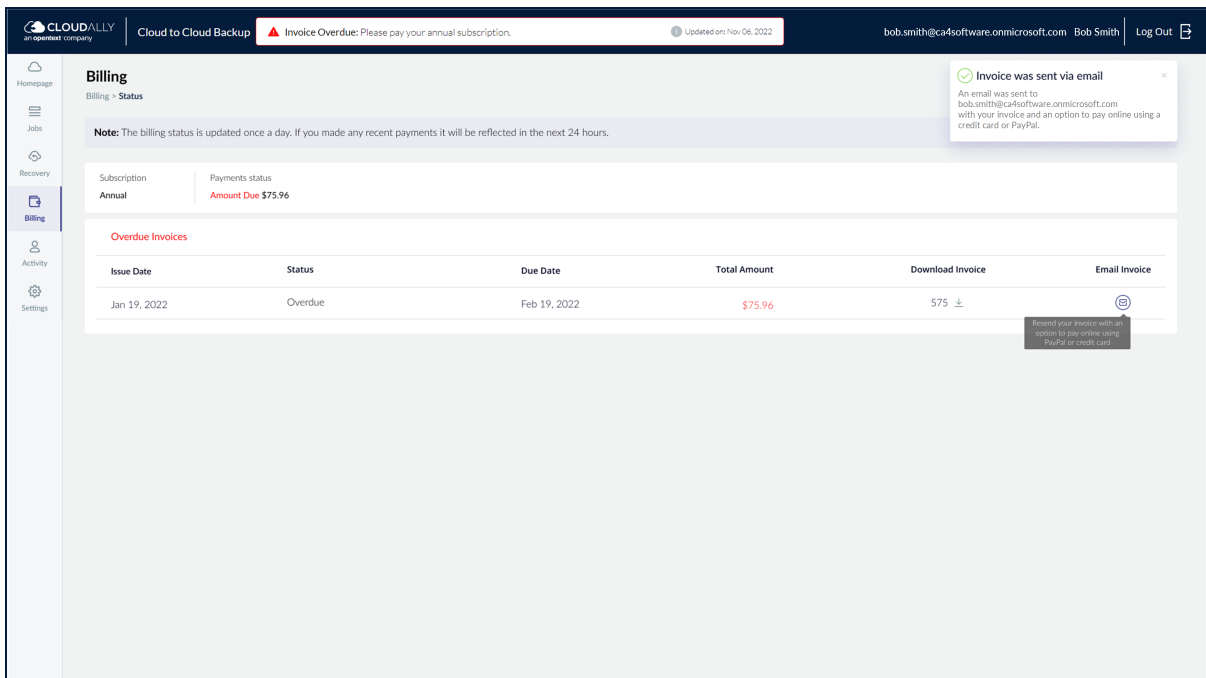
When you have paid your annual subscription, this page displays the next payment forecast for the upcoming payment date. The details include Service type and backup name, Quantity, Unit Price, and the Total Amount.

If you have neglected to pay your annual subscription, the status will look like this:
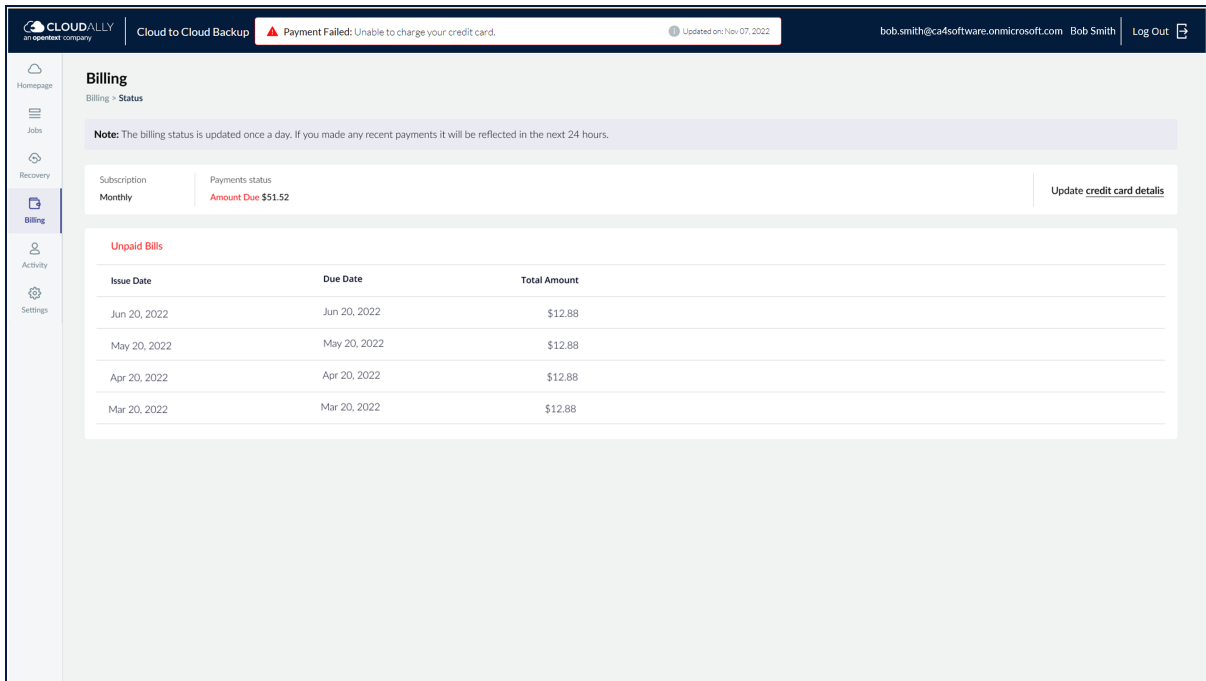
You can click ⬇ to download the invoice, or you can click ◎ to receive an email version of your invoice, with the option to pay online either by PayPal or credit card.

Monthly

Similarly, if you neglected to pay your monthly subscription fee, the status will look as follows:

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

6.4   History

This page displays the history of payments.

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.

CLOUDALLY

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

Certified Copy

26 Apr 2021

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	**1,137.50 GBP**

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

6.5   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 ✎ to the right of 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.
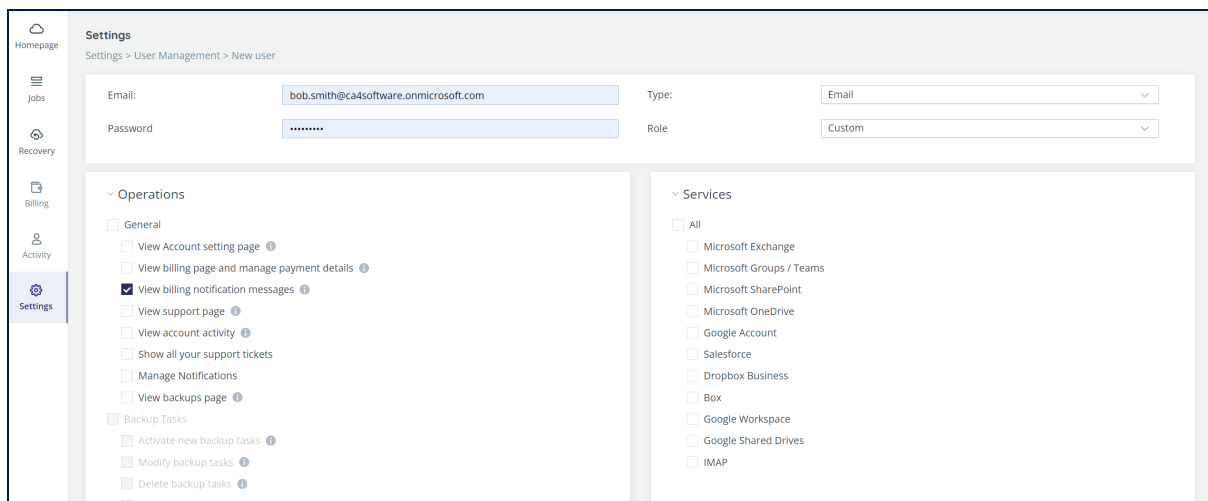
7   Support Pages

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.
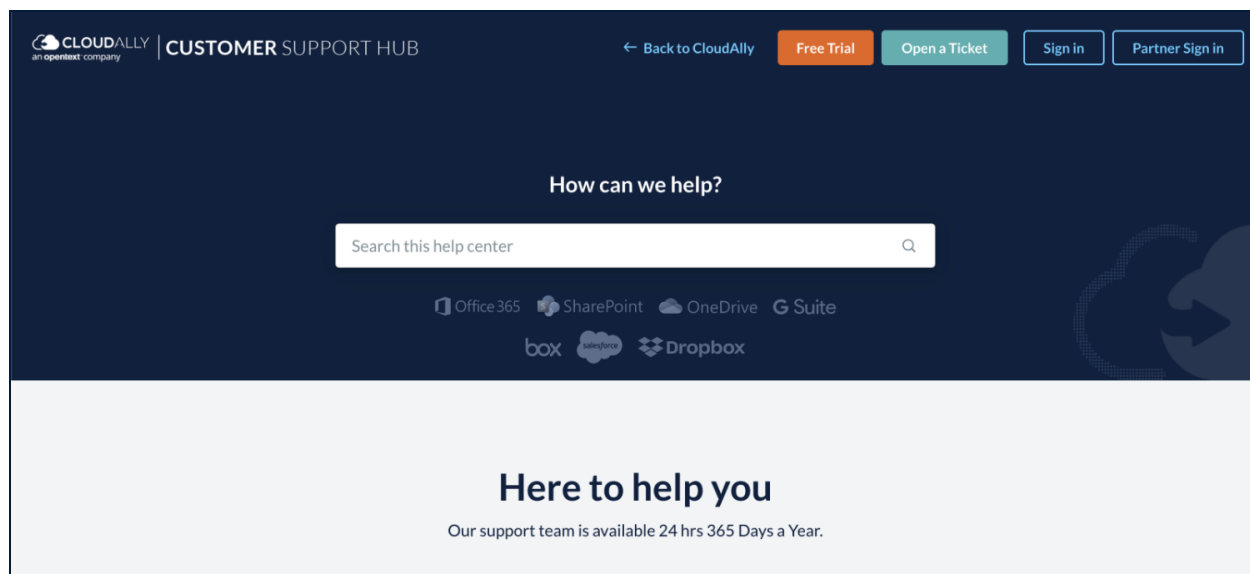
CloudAlly provides multi-channel support options:

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

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