eFolder™
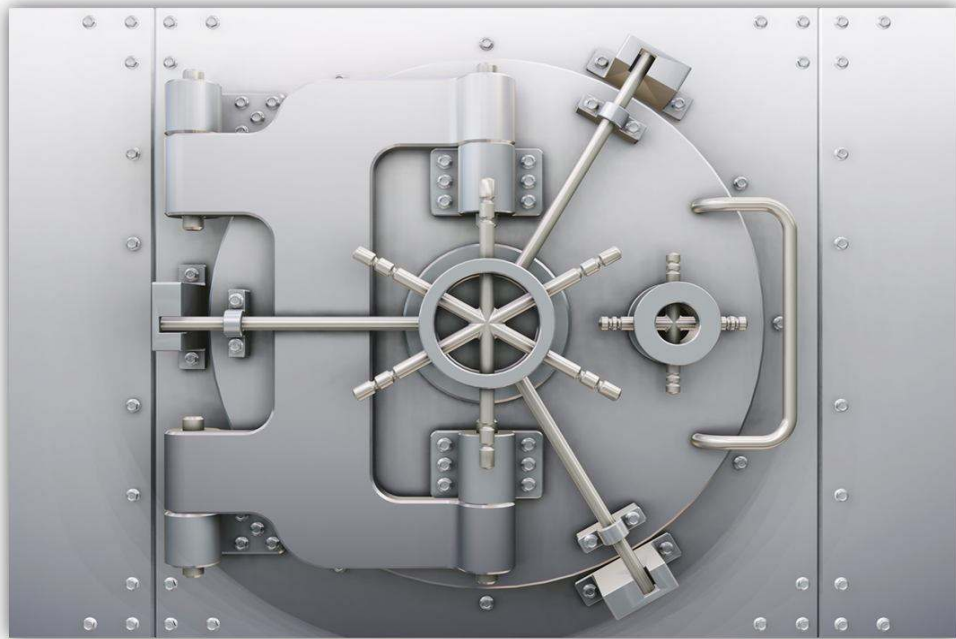
Partner's Guide to the Web Portal
Version: HLP:PGWP V1.1

www.eFolder.net

Local and Off-site Data Backup. Anytime, Anywhere Data Access.

Email Retention and Discovery. Mailbox Storage Management.

Table of Contents

1-1 Overview: Using the Web Portal

The Web Portal serves different purposes based on your role:

- **For your customers:** Your customers can use your branded Web Portal software to view reports, create and manage their sub-accounts, manage their contact information, and manage their notifications.

- **For partners:** In addition to the functionality described above, the Web Portal software provides tools that allow you to create, manage, and monitor backup and email archiving services for your customers and accounts.

Under the **My Account** menu you will find the tools you will need to manage your own accounts. Here you can change contact information, passwords, notifications and sign-up for mailing lists.

The **Accounts** menu gives you access to the tools need for creating new accounts, managing your list of accounts, as well as the ability to impersonate your customers' accounts. By impersonating an account, the system allows you to use the Web Portal as if you were that customer. This feature can be very valuable if your customer has asked for help to change their contact information or an account password.

The **Reports** menu has both the Dash Panel and a series of pre-defined reports. The Dash Panel gives you the ability to quickly check on the status of all of the backups and email archiving services for all of your accounts. Use this tool daily to make sure that all of your customers' backups and archiving processes are occurring successfully and are error free.

When the time comes to bill your customers, you can export account information from the account list. Use the **Reports > Accounts > Billable Accounts** menu item for a predefined search of your account list that will result in only billable accounts (excluding trial accounts and sub-accounts).

Use the features of the **Support** menu for downloading software, performing a recovery of a pass phrase, creating and viewing trouble tickets, online help, and accessing the latest news and announcements regarding the software.

1-2 Terminology

Commonly Used Terms:

Term	Definition
Account	Represents backup services or email archiving services for a single computer. Each account has a unique user name. There are two types of accounts. *See Parent Account and Sub-Account*.
Account List	Interactive list of key information regarding a group of accounts. Provides operations to manage accounts and export data to Excel, CSV, or XML.
Customer	One billable entity. A customer can be associated with one or more accounts.
Dash Panel	Display that allows you to check on the status of all of the backups for all of your accounts.
Impersonation	The ability to look at one of your customer's accounts in the same way that they would, without knowing their password. This gives you the ability to change contact information and notification settings, and view disk usage history. You choose to impersonate an account from the Account List.
Parent Account	An account associated with a service plan and quota. A parent account can login to the web portal and manage all of the sub-accounts.
Pass Phrase	A pass phrase consists of at least three words and is used to encrypt your archived data. The phrase is case sensitive and is required to restore archived data. All pass phrases (old and new) should never be forgotten.
Password	A secret word or string of characters that is used to allow access to the client and Web Portal software. A password must be at least eight characters long and contain at least one number or punctuation mark.
Security Question	The security question consists of a question and answer that are defined by the account user. In order for a user to reset their account password without involving their Partner, they must have setup an account security question and be able to correctly answer it.
Security Role	Permissions assigned to an Account for the purpose of accessing and modifying account information and settings. The Role of sub-accounts may be different than the Role of its parent account.
Service Plan	Determines the available features and billing rate. • Select: Any number of versions can be stored. • Basic: Only one current version and one historical version is stored. Cannot backup SQL Server or Exchange. • Trial: Same features as Select, but for a limited time period
Sub-Account	Belongs to a parent account. The service plan of a sub-account is always the same as its parent account. The disk usage of a sub-account is aggregated with the disk usage of its parent account for billing purposes. The password and contact information of a sub-account may optionally be linked to the information in the parent account or can be unique to the sub-account.
User Name	A unique name associated with each account. Used for logging in to the web portal and in the client software to authenticate the account.

1-3 Contacting Us

If you need assistance with any part of the Web Portal please open a ticket by sending an email to support@efolder.net

Headquarters

eFolder, Inc,
2340 Perimeter Park Drive, Suite 100
Atlanta, GA 30341

Phone: 800-352-0248
Fax: 866-423-4863

1-4 About eFolder

Awards and Industry Recognition:

eFolder has received acclaim from both the channel and our users for our software and our channel strategy.

2007 CompTIA Breakaway Conference - Best Channel Strategy and Best Software Product Awards:

eFolder received the Best Software Product and Best Channel Strategy awards at the 2007 CompTIA Breakaway conference held July 31 - August 2 in Las Vegas. Attended by senior level executives from over 1500 of the leading VARs, Solutions Providers and computer service organizations, the annual Breakaway event is one of the industry's premier gatherings. eFolder was presented 2 of the 7 prestigious Best of Show awards including "Best Product - Software" and "Best Channel Strategy." eFolder was also the runner-up for the top award give, "Best of Show."

2007 CompTIA Managed Services Summit - Best Channel Strategy Award:

eFolder received the Best Channel Strategy award at the 2007 CompTIA Managed Services Summit at Coronado, CA. The summit was a gathering of senior-level executives from the top SMB VARs and Solution Providers from all over the United States. The award recognizes eFolder's unique channel strategy offering industry leading recurring margins, personal training and support, and custom software branding.

2007 CompTIA Managed Services Summit - Best Product - Software Award:

eFolder also received the award for the best software product, recognizing our enterprise class feature set, military-grade security, and intuitive, elegant user interface.

2007 CRN 50 Emerging Vendors Placement:

Out of the 163 vendors CRN named to its 2007 emerging vendors list, eFolder was seleted as one of the 50 vendors for the placment on CRN's 50 Emerging Vendors List. CRN selected those emerging vendors that it thought were especially noteworthy and of interest to solution providers who are seeking new vendors.

2007 CRN Emerging Tech Dynamo Vendor:

eFolder was named on CRN's 2007 Emerging Tech Dynamo vendor list. According to CRN, these vendors "have far superior technology, more robust margins and uncompromising technical support. They are the CRN Emerging Tech Dynamos and they're reshaping the information technology industry, solution providers say, by handily beating established vendors in head-to-head product, margin, technical support and field engagement comparisons".

2006 CRN Emerging Tech 100 Vendor:

CRN named eFolder on its 2006 Emerging Tech 100 list, which represents those vendors CRN feels are delivering high margins for resellers through innovation and easy-to-use technology.

2-1 Overview: Managing My Account

This chapter describes how to manage the optional configuration and control features of your account.

The tools available to you are covered under the following five topics:

- Set email notifications based on backup status and disk usage, see "Setting Notifications for Your Account"

- Select informational email options, see "Joining Mailing Lists"

- Update your contact information, see "Changing Your Contact Information"

- Change the password used to log into your account, see "Changing Your Password"

- Reset the security question for your account, see "Changing Your Security Question"

- Handle a forgotten password or user name, see "Forgotten Password or User Name"

Notifications are email messages based on the status and disk usage of backup services for an account.

The Mailing Lists feature allows you to sign up to receive emails regarding software updates, maintenance notifications, and company news.

Contact information, your account password and security question can all be managed and modified from the sub-menus of under **My Account**.

To access the features for managing your account, select **My Account** off the main menu bar.

To change any of this information for one of your customer's accounts, impersonate the account using the Account List and then access the **My Account** menu. Read more about how to impersonate accounts in "Using the Account List."
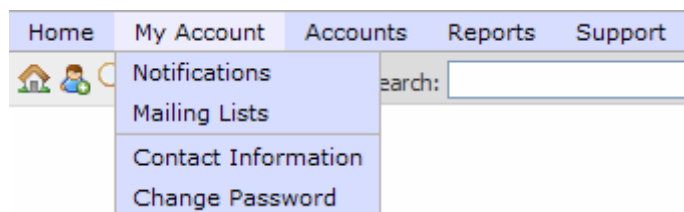
2-2 Setting Notifications for Your Account

This page allows you to manage your email notification settings. You can be notified if your account has not been backed up recently, if your account is using more than a certain amount of storage space, or when there is a significant change in the amount of storage space being used. The Notifications page also displays the email address that will be used for these notifications and gives you the ability to update the contact information.

Manage your Notifications Settings:

1. Choose **My Account > Notifications**. This opens the Notifications page.

2. The email address from the contact information is displayed at the top of the page. This is where email notifications will be sent. Pressing the [change] link brings you to the "Contact Information" page. Here you can change the email address. Press the *Save Changes* button when you are finished.

3. The first email alert message is the Total Disk Usage Notification and is useful for being informed if an account is over a certain amount of disk storage. This is an alternative to setting a disk usage quota on an account--instead of backups failing when an account is over its quota, with this technique someone can be notified frequently that the account is over a certain amount of disk usage, but the backups will continue to run successfully until the disk usage is reduced. To turn on this alert, you need place a check in the first box.

CONFIGURATION

☑ **Total Disk Usage Notification**

Send email when [all accounts are ▾] using more than [U] GB every [V] days.
- all accounts are
- this account is

If you are logged into or impersonating a parent account and select "all accounts are," the system will issue alerts based on the total storage used by this parent account and all of its sub-accounts. If you are not logged into a parent account or if you select "this account is," the system will issue an alert based on the total storage used by only this account.

⚠️ *If a sub-account is changed to a parent account, the alert setting of "all accounts are" will then total the storage used by this parent account plus all of its sub-accounts.*

The email address in the contact information for this account will receive an email alert every **V** days when the chosen account(s) are storing more than **U** gigabytes of data.

4. The second email alert message is the Disk Usage Change Notification and is for monitoring how fast an account's disk usage increases or decreases within a specified number of days. To turn on this alert, you need place a check in the first box.

☑ **Disk Usage Change Notification**

Send email if disk usage changes by more than [W] [% ▾] within [X] days.
- %
- GB

The email address in the contact information for this account will receive an email if the total disk usage for this account changes by more than **W** (% of total size OR Gigabytes) within any period of **X** days.

5. The third email notification is the No Backup Notification and will inform you if an account has not completed a remote backup within the last few days. To turn on this alert, you need place a check in the first box.

☑ **No Backup Notification**

Send email if there is no backup after [Y] days and thereafter every [Z] days.

The email address in the contact information for this account will receive an email if a remote backup has not finished for the account within the last **Y** days. This email will be re-sent every **Z** days following, until a remote backup has been completed. Note that if the remote backup runs continuously for longer than **Y** days then you will also receive this notification.

6. Press the *Save Changes* button when you are finished, or press *Cancel* to leave the settings as they were and ignore any changes.

[Save Changes]

2-3 Joining Mailing Lists

Through the Web Portal software you have the option of subscribing to several different mailing lists. These mailing lists are the best way to keep up-to-date with company news, product updates, partner program updates, and maintenance notices. An RSS news feed is also available, although any confidential information is only sent to the mailing lists and is not posted to the RSS news feed.

Set Up or Change your Mailing List Memberships:

1. Choose **My Account > Mailing Lists**. This opens the Mailing Lists page.

2. The email address from the contact information is displayed and is where these informational email messages will be sent. Pressing the [change] link will bring you to the "Contact Information" page. Here you can change the email address. Press the *Save Changes* button when you are finished.

3. Click the check box for those types of emails that you would like to receive. These informative emails will be periodically sent to the email address in the contact information for this account.

Your email address is only used to receive messages sent to the mailing lists for which you are subscribed and for account notifications, and is not shared with any third parties.

CONFIGURE LIST MEMBERSHIP

☐ **Product News**: Information on new software versions and notifications of major feature enhancements to the web portal.

☑ **Partner Program Updates**: Important information on changes to partner programs, strategic plans. (Important)

☑ **Product News for Partners**: Notification of new knowledge base articles, additional documentation, feature enhancements for partners.

☑ **Operational Notices**: Notification of upcoming server maintenance, immediate explanation of unexpected server downtime, etc. (Important)

⚠️ *We strongly suggest that as a partner you sign up for the Partner Program Updates, Product News for Partners, and Operational Notices.*

4. Press the *Save Changes* button when you are finished, or press *Cancel* to leave the settings as they were and ignore any changes.

Save Changes

2-4 Changing Your Contact Information

The contact information is used to direct where the welcome message, email alerts, newsletters, and updates are sent. It also determines which time zone to use for reporting and how to contact you, if needed. Filling out proper contact information for your customers can also help you properly bill them when you export data from the Account List.

The contact information of sub-accounts is often linked to its parent account, such that when the contact information of the parent account changes the contact information for the sub-account will also change. If you are changing the contact information for a sub-account whose contact record is not merged with its parent account, then these changes will not affect the parent account or any of the other sub-accounts.

Enter or Modify your Contact Information:

1. Choose **My Account > Contact Information**. This opens the Contact Information page.

2. The contact information fields are pre-filled with the current values. Replace any existing text with the updated information.

CONTACT INFORMATION

Company Name:	Eddie's TV Repair
First Name:	Eddie *
Last Name:	Jones *
Email Address:	Eddie@ETVmail.com *
Confirm Email Address:	Eddie@ETVmail.com *
Phone Number:	770-555-1234
Zip:	30341 *
Country:	United States *
Time Zone:	-5:00: US/Eastern: 1 Eastern Standard (US/Easte *

⚠️ *Place your mouse over the* ❓ *to see field description.*

⚠️ *Any field marked with an asterisk (*) is a required field.*

⚠️ *The single address in the* **Email Address** *field is the address that will be used when the Welcome New Account message is sent. Partners that are setup as Managed Service Providers (who completely install and manage the client software) will most likely want to use their own email address here instead of the customer's email address.*

3. Press the *Save Changes* button when you are finished, or press *Cancel* to leave the settings as they were and ignore any changes.

[Save Changes]

2-5 Changing Your Password

Unlike pass phrases which cannot be changed without reuploading the data for an account, an account's password can be changed or reset at any time. Passwords protect access to an account (e.g. logging in and destroying data), while pass phrases protect the confidentiality of an account's uploaded data.

Passwords are either unique to an account or in the case of some sub-accounts, they may be linked to the password of their parent account. The Change Password page will allow you to change the password for the account you are currently logged in as (or impersonating). Changing the account password does **not** change any encryption keys.

Changing the Password:

1. Choose **Accounts > Change Password**. This opens the Change Account Password page.

If you are attempting to change the password of a sub-account, you will get a message like the one below if the password of this sub-account was linked to the parent account. The system will not let you change the password of a sub-account that is currently linked to the parent account. Instead, the parent account must login and change the password, which will also update the password for all sub-accounts with linked passwords.

Change Account Password

This password is linked to the password of the parent account (DOC30199001) and cannot be changed. Login as the parent account to change the password.

2. You will be required to know the current password in order to change to a new password.

CHANGE ACCOUNT PASSWORD

Use this area to change your password. To protect your account, you cannot change the password if you cannot remember your old password. If you have forgotten your old password click here.

Account Number: DOC30199001
User Name: ETV-Primary
Old Password: [   ] *
Password: [   ] *
Confirm Password: [   ] *

⚠ *Place your mouse over the 🛈 to see field description.*

⚠ *Any field marked with an asterisk (*) is a required field.*

3. Enter the existing password in the **Old Password** field. If you have forgotten the old password, press the "click here" link in the leading paragraph. For more information see the topic on "Forgotten Password or User Name".

Tip: If you are a partner and are impersonating one of your customer's accounts, then you do not need to know the old password in order to set a new password on the account.

4. Enter the new password in both the **Password** and **Confirm Password** fields. The new password must be at least 8 characters long and contain at least one number or punctuation mark.

5. Press the *Save Changes* button when you are finished, or press *Cancel* to leave the settings as they were and ignore any changes.

[Save Changes]

6. Once the system has accepted the new account password, a confirmation page will be displayed.

Change Account Password

CHANGE ACCOUNT PASSWORD

Your password has been changed. You must update your password within the My Account panel in the Professional Backup Software or your backups will no longer work.

⚠️ *Once this change is complete, the new password will also need to be set on the My Account page in the backup manager. When the backup manager starts, the old password will still be pre-filled on the My Account page. If the password has already been changed in the web portal, do not use the Change Password button. Instead, just delete the previous password in the* **Password** *field using the backspace key and type in the new password. Then click Test Connection, and if successful, click the Save button in the lower-right corner.*

My Account

Account Credentials

User Name: ETV-Primary   Manage Account

Password: ●●●●●●●●●●●●   Change Password

2-6 Changing Your Security Question

This page allows you to change your security question and/or your security answer. Changing the security question and answer does **not** change any encryption keys. Also, this security question and answer is not related to the security questions and answers you may have configured during the pass phrase recovery setup process. The security question and answer on this page are only related to resetting the account password.

Changing the Security Question/Answer:

1. Choose **Accounts > Change Password**. This opens the Change Account Password page.

Home	My Account	Accounts	Reports	Support
	Notifications	earch:		
	Mailing Lists			
	Contact Information			
	Change Password			

2. To change the security question for an account, scroll half way down the page to the heading **Change Security Question and Answer**. You will be required to know the current password in order to make this change.

CHANGE SECURITY QUESTION AND ANSWER

Use this area to change the security question and answer protecting the password of your account. If you forget your password, you will need to answer your security question in order to have your password reset. This is not related to the security questions and answers protecting your pass phrase.

To protect your account, you cannot change the security question and answer without knowing your current password. If you have forgotten your password click here.

Account Number: DOC30199001
User Name: ETV-Primary
Current Password: _____ *
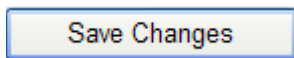Security Question: _____ *
Answer: _____ *
Confirm Answer: _____ *

⚠ *Place your mouse over the 🌐 to see field description.*

⚠ *Any field marked with an asterisk (*) is a required field.*

3. Enter the existing password in the **Current Password** field. If you have forgotten the current password, press the "click here" link in the leading paragraph. For more information see the topic on "Forgotten Password or User Name".

4. Enter a **Security Question**. The answer to this question should be something personal that would be difficult for others to discover and that will be easy for you to remember.

5. Enter the answer to your security question in both the **Answer** and **Confirm Answer** fields. Note that your actual answer is not stored in our database. Rather, a cryptographic hash of your answer is stored in our database. This means that no one will be able to see the contents of your answer--our system will only be able to verify that you know the answer, but will not actually know what your answer contains.

6. Press the *Save Changes* button when you are finished, or press *Cancel* to leave the settings as they were and ignore any changes.

Save Changes

7. Once the system has accepted the new account security question, a confirmation page will be displayed.

Change Account Password

CHANGE SECURITY QUESTION AND ANSWER

Your security question and answer has been changed.

2-7 Forgotten Password or User Name

If you are in the process of changing your account password or security question / answer and have forgotten the existing account password, the system will direct you to the Forgotten Password or User Name page. From here you can reset your password with the use of your email address and security question or have your user name emailed to you.

Forgotten Password:

1. To have a password reset you will need to know your user name and the matching email address from the contact information.

Tip: If one of your customers has forgotten their password, and you still know the username and password of your own partner account, then you can reset the password for your customer's account without having to use this page. Instead, login to your partner account, find the customer's account in the Account List, and the use reset password command on the account.

FORGOTTEN PASSWORD

Use this page to reset a forgotten password. If you have forgotten your user name click here.

User Name: [   ]

Email Address: [   ]

2. Press the *Lookup Account* button when you are finished, or press *Cancel* to leave the settings as they were and ignore any changes.

Lookup Account

3. You will be presented with the security question that was defined as part of this account. You will need to supply the correct answer to the security question to proceed.

FORGOTTEN PASSWORD

Enter the answer to your security question below.

User Name: ETV-Primary
Email Address: Eddie@ETVmail.com
Security Question: What is my goal?
Answer to Question: [   ]

4. Press the *Reset Password* button when you are finished, or press *Cancel* to leave the settings as they were and ignore any changes.

Reset Password

5. The system will change the account password to a randomly generated string. You should use the temporary password to login and change the account password to something more memorable by clicking the "click here" link in the confirmation message:

Forgotten User Name or Password

Your password has been reset to gospopradrapuli.

Please click here to login and change your password immediately. Then update your password within the My Account panel in the Professional Backup Software or your backups will no longer work.

⚠ *The string displayed is the new password for this account. If you choose to change the password, you will need to know this one.*

6.   The system will take you back to the Change Account Password page. Here you can change the account password. See "Changing Your Password" for detailed information.

Forgotten User Name:

1. If you do not remember your user name, scroll down the Forgotten User Name or Password page to the title of **Forgotten User Name**. Here you can enter the email address from this account's contact information.

FORGOTTEN USER NAME

Use this page to recover your user name using the email address associated with your account. You will be emailed the account information associated with the email address you enter below.

Email Address:

2. Press the *Find Account* button when you are finished, or press *Cancel* to leave the settings as they were and ignore any changes.

Find Account

3. The system will identify any accounts that have a matching email address in their contact information. The user names of those matching accounts will be forwarded in a email to that email address. Once you have retrieved the correct user name from your email, press the "Click

here" link to start the process of resetting a forgotten password.

Forgotten User Name or Password

The account information has been emailed to Eddie@ETVmail.com.
Click here to start over.

# 3-1 Overview: Creating Customer Accounts

This chapter describes how to use the Web Portal to create new customers, parent accounts and sub-accounts.

When creating customers and accounts keep the following concepts in mind:
1. Every customer is a single billing entity
2. A customer can own from one to an infinite number of accounts
3. An account represents the backup scheme for a single computer
4. A single computer can have more than one backup scheme.

An account can be either a parent account or a sub-account. The first account created for any customer is always a parent account. The parent account specifies which type of Service Plan (Select, Basic or Trial) to be used for that parent account and all of its sub-accounts. Since there are only three types of Service Plans, a customer should be set-up with at most three parent accounts (this scheme will help keep your costs down and make billing more clear). Typically you would never have more than two parent accounts (one for each type of billable service plan). The exception might be if you have a customer that is using both Basic and Select backup accounts, and then wants free trial of the email archiving service. Each parent account can have a limitless number of sub-accounts associated with it. There is no extra charge for additional sub-accounts.

IMPORTANT: You should not use the same account on more than one computer. The backup software will normally prevent you from doing this. Using the same account on more than one computer can cause data from the computers to become mixed, and will also interfere with monitoring and notifications for the separate accounts. Since there is no charge for additional sub-accounts, there is no advantage to using the same account on more than one computer.
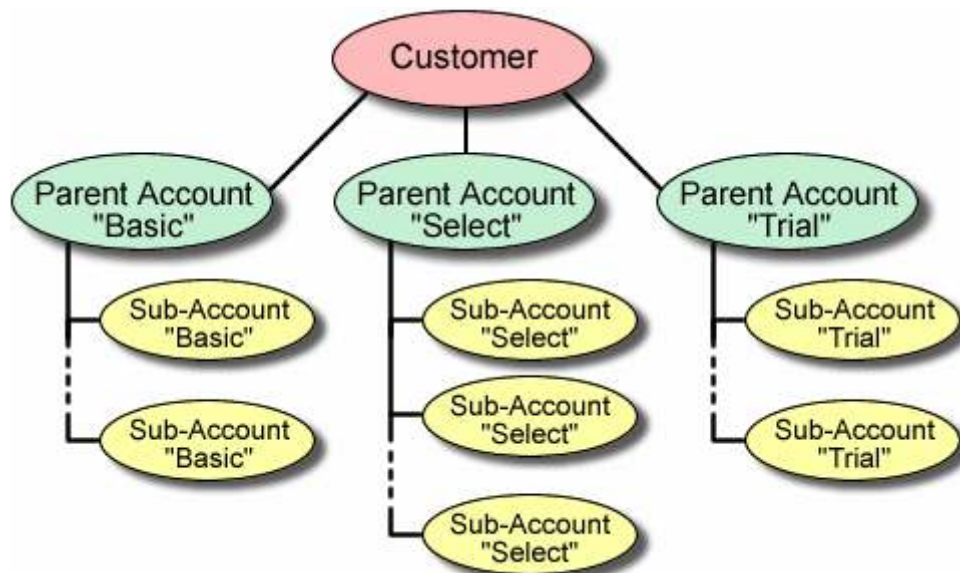
Using Parent Accounts

A parent account can represent the backup of a single computer or it can be used only to group the sub-accounts of the same type of Service Plan. When the parent account is not being used to represent a backup, you will want to turn off the No Backup Notification on the parent account. Do this by impersonating the parent account and then:

My Account > Notifications

CONFIGURATION

☐ **Total Disk Usage Notification**
Send email when [all accounts are ▾] using more than [   ] GB every [7] days.

☑ **Disk Usage Change Notification**
Send email if disk usage changes by more than [5] [% ▾] within [7] days.

☐ **No Backup Notification**
Send email if there is no backup after [3] days and thereafter every [7] days.

[Save Changes]   [Cancel]

Comparing Service Plans

The primary differences between a Basic Service Plan and a Select Service Plan are the number of backup versions stored and the ability to backup open files on server operating systems, such as Microsoft® Exchange and SQL Server data. Note that Basic can backup open files on desktop operating systems, such as Windows XP, Vista, and Windows 7. The Basic Service Plan only stores the current version of each file, plus the previous version of each file. On servers, the Basic Service Plan is intended for data that does not change often or is not in open files, such as images, scanned documents and documents that are archival in nature. The Basic service plan is also suitable for backing up laptops and workstations. The Select Service Plan allows for both an infinite number of backup versions and gives the user the ability to backup open files on server operating systems (e.g., Server 2003, Server 2008, etc.). The Trial Service Plan has the same features of the Select Service Plan except that the account will automatically expire after a period of time. Partners can extend trial periods for their customers' accounts up to 60 days.

⚠ *The majority of all our accounts use Select Service Plan.*

Due to cost, a customer may want to utilize both the Basic Service Plan and the Select Service Plan for a single computer. This is done by defining two accounts where each account represents one type of backup scenario. For example, a Basic account can be used to automatically backup all data that has not been modified in the last year, and a Select account can be used to backup all data that has been modified in the last year, and data can automatically migrate from the Select account to the Basic account as the data ages.

⚠ *There is a Knowledge Base article entitled "How do I configure more than one*

account on the same computer" *that will guide you through this process.*

Other Topics

The following topics will walk you through the steps you will need to perform when:

- [Creating a Customer](#)
- [Creating a Sub-Account for an Existing Customer](#)
- [Adding another Service Plan to an Existing Customer](#)
- [Creating a Trial Account](#)

3-2 Creating a Customer

To create a customer you must create a new account that will be associated with the customer. This first account will be a parent account that other sub-accounts will be associated with. The parent account determines the type of Service Plan (Basic, Select, or Trial) and the default contact information of the sub-accounts.

Creating a customer with a new account:

1. Choose **Accounts > Create Account**. This opens the Create New Customer / Account page.

Home	My Account	Accounts	Reports	Support
		Account List		
	Accou	Create Account		

2. Using the **New Customer?** field select "New Customer" when you want to define a new billing entity. A new customer is defined by creating that customer's first parent account.

CUSTOMER INFORMATION

New Customer? New Customer *

New Customer
Existing Customer

⚠ *Place your mouse over the 🌐 to see field description.*

⚠ *Any field marked with an asterisk (*) is a required field.*

3. Select the **Brand** that you want to use for this customer. The brand affects the brand displayed in the software running on the client's system and the logos and the product name visible in the Web Portal. The list will show all of your pre-defined brands (most partners will have only a single brand).

Brand: doc (Professional Resellers, Inc.): *

4. Supply the contact information for this new customer.

CONTACT INFORMATION

Company Name:	Eddie's TV Repair
First Name:	Eddie *
Last Name:	Jones *
Email Address:	Eddie@ETVRepair.net *
Phone Number:	770-555-1234
Phone Number (Night):	770-555-1123
Phone Number (Mobile):	404-555-1112
Phone Number (Other):	
Fax Number:	
Address Line 1:	492 Main Street *
Address Line 2:	
City:	Marietta *
State:	GA *
Zip:	30199 *
Country:	United States *
Time Zone:	-5:00: US/Eastern: 1 Eastern Standard (US/Easte *

⚠️ *The single address in the **Email Address** field is the address that will be used when the Welcome New Account message is sent. Partners that are set-up as Managed Service Providers (who completely install and manage the client software) will most likely want to use their own email address here instead of the customer's email address.*

5. Enter the Account Information starting with the **Service Plan** field. Select the type of **Service Plan** that is to be assigned to this parent account: "Basic", "Select" or "Trial". The majority of our accounts use the "Select" type of service plan.

ACCOUNT INFORMATION

Service Plan:	Select: Select #GB=0 QuotaMB=-1 Cmp=0 *

Basic: Basic #GB=0 QuotaMB=-1 Cmp=0
Select: Select #GB=0 QuotaMB=-1 Cmp=0
Trial: Trial accounts #GB=1 QuotaMB=512 Cmp=0

6. Select the name of the company that referred this customer using the **Referring Partner** field.

This field is normally left to be "(none)". Leave this field unchanged and the system will default to your company name. Note that the system knows that the account is associated with your Partnership even if the Referring Partner is "(none)" because it is being created in your brand.

Referring Partner: (none) *

7. Use the **User Name** field to enter a descriptive name that helps you identify which computer is associated with this account. The **User Name** is not a required field; however, if you do not create a user name then the system will generate one for you based on the account number.

User Name: ETV-Primary

⚠️ *The **User Name** must be universally unique across all accounts (even accounts you don't own). To increase the likelihood of a unique name, try combining your customer's name with a computer description: "ETV-BackOffice", "ETV-FrontOffice", "ETV-SalesLaptop01", or "CraigsVac-Billing".*

8. You have the option to change the password in the **Password** field.

New Password: tra4nacechi5 *
Generate Random Password
Must Change Pwd: ✔ *

9. When the **Must Change Pwd** box is checked the system makes the password a temporary password. The temporary password will be emailed to the contact person listed on the account. The first time the user logs in, the system will require them to enter a new password.

⚠️ *We recommend that you use a temporary password that is easy to type and easy to remember. Keep the **Must Change Pwd** box checked. This will force the user to pick a new password that they will have to remember.*

10. Use the **Description** field to record any information regarding this account. This information can be seen by the user.

Description: Quickbooks Server
Internal Desc: Back Office Computer

11. Use the **Internal Desc** field to record any information regarding this account that you do not want the user to be able to see.

12. Use the **Num of Trial Days** field to set the length that a trial account will function. If you leave this field bank and have selected a Service Plan type of "Trial", the value of this field will default to 30 days.

Num of Trial Days:	
Hard Quota MB:	
User Quota MB:	
Notify User via Email:	☑

13. Use the **Hard Quota MB** field to specify the maximum amount of storage allocated to this account in megabytes. If left blank, this field defaults to infinite for non-trial account or 512MB for trial accounts. The system uses "-1" to represent an infinite amount of storage.

⚠ *Multiply the desired number of GB by 1024 to get the number of MB.*

⚠ *It is important to note that the **Hard Quota MB** field in a parent account is the total amount of storage that will be allowed for the parent account plus all of its sub-accounts.*

⚠ *If the storage limit is reached during a backup, the backup process will stop and the system will issue error messages in the backup log, notifying you via email according to the settings on the Notifications tab of the Options page in the backup manager. As an alternative to configuring a disk usage quota, you can setup a Total Disk Usage notification for the account. With this strategy, you will still be emailed when the account goes over their desired amount, but their backups will not actually fail.*

⚠ *In general, you should only set a hard quota on an account if the customer has purchased a pre-determined amount of storage from you. If you plan to bill your customer based on actual disk usage, it is better to encourage users to set a Total Disk Usage notification, rather than set a user quota.*
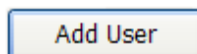
14. The **User Quota MB** field is typically blank. The user can use this field to set their own quota.

⚠ *The actual quota is the minimum of the two quotas (**Hard Quote MB** and **User Quota MB**) and of the amount of disk usage remaining under the parent account.*

15. Leave the **Notify User via Email** box checked if you want the user to receive an email once this account is created. If the **Must Change Pwd** box was checked, making the password temporary, the temporary password will be included in the Welcome New Account email. If the password is not temporary, it will not be included in the Welcome New Account email.

16. Press the *Add User* button.

[Add User]

⚠ *If the system finds a mistake in the account information you are trying to save, you will be*

returned to the Create New Customer / Account page.

⚠️ *Once the system has accepted the new account information, a confirmation page like the one shown below will be displayed. If requested, a Welcome New Account email message will also be sent to the contact.*

Create Account

OPERATION RESULTS

The new account has been created. The customer has been notified via email to Eddie@ETVRepair.net

Account Number:	DOC30199001
User Name:	ETV-Primary
Password:	slecosuri3lacla

3-3 Creating a Sub-Account for an Existing Customer

Once you have created at least one parent account, you can now create as many sub-accounts as that customer needs (at least one sub-account for each additional computer that want to backup). The Service Plan (Basic, Select, or Trial) for a sub-account is always inherited from its parent account.

Every account (parent or sub-account) should always be associated with the backup of only one computer--using an account to backup more than one computer is not supported and can cause problems. As there is no charge for additional sub-accounts, there is no advantage to using the same account on more than one computer.

Creating a sub-account for an existing customer:

1. Choose **Accounts > Create Account**. This opens the Create New Customer / Account page.

2. Using the **New Customer?** field select "Existing Customer" when you want to define a new sub-account for an existing customer.

⚠️ *Place your mouse over the 🔵 to see field description.*

⚠️ *Any field marked with an asterisk (*) is a required field.*

3. From the list of your customers in the **Existing Customer** select which customer that this account is to be added to. The list will show all of the customers that you have already created.

4. Select "Existing Contact" in the **New Contact?** field and the contact information for this

account will be the same as in the parent account. If this account requires different contact information (e.g., because a different notification email address is desired), select "New Contact" and the contact fields will be displayed, pre-filled with the contact information from the parent account. You can then make the appropriate changes to the contact information. Most customers will use the same contact for all of their accounts.

CONTACT INFORMATION

If another person is responsible for the account please select "New Contact" and change the appropriate information. Otherwise the contact information will be linked with the parent account's information.

New Contact? | Existing Contact ▾ | ☯ *
New Contact
Existing Contact

5. Enter the Account Information starting with the **Parent Account ID** field. Because you are creating a sub-account, you need to select the parent account that this sub-account is to be associated with. The type of Service Plan (Select, Basic or Trial) for this sub-account will be inherited from its parent account and is displayed in the Parent Account ID combo box.

ACCOUNT INFORMATION

You are creating a new account for an existing customer. In almost all cases you will want to create this new account as a sub-account. Please select the account that will be the parent account for this sub-account.

Parent Account ID: | 356: DOC30199001, ETV-BackOffice;Back Office ▾ | ☯ *

⚠️ *The list will be pre-filled with the identifying information of all parent accounts that currently exist for the customer selected at the top of the page.*

6. Use the **User Name** field to enter a descriptive name that helps you identify which computer is associated with this account. The **User Name** is not a required field. However, if you do not create a user name then the system will generate one based on the account number.

User Name: | ETV-FrontOffice | ☯

⚠️ *The **User Name** must be universally unique across all accounts (even accounts you don't own). To increase the likelihood of a unique name, try combining the customer's name with a computer description: "ETV-FrontOffice", "ETV-BackOffice", "ETV-SalesLaptop01", or "CraigsVac-Billing".*

7. Use the **Password** field to specify if this account password is to be the same or different than the parent account. Setting this field to "Linked to the Parent Account" will set the sub-account's

password to the parent account's password. It will also tie the two passwords together. If the parent account's password is changed, then the sub-account password will also be changed. If your customer needs greater security, set this field to "Different from Parent Account". The proper scenario will depend on your customer's situation.

Password: Linked to the Parent Account ∨ ☉ *
Linked to the Parent Account
Different from the Parent Account

⚠ *If you are a Managed Service Provider and are managing the entire backup process for your customers, you will most likely set the* **Password** *field to "Linked to the Parent Account". If your customers manage their own backups and their end-users all have administrative access on their computers, we recommend that you use* "Different from Parent Account" *to allow for greater security.*

8. Use the **Description** field to record any information regarding this account. This information can be seen by the user.

Description: Front Office Computer ☉
Internal Desc: Used for daily business transactions ☉

9. Use the **Internal Desc** field to record any information regarding this account that you do not want the user to be able to see.

10. Use the **Num of Trial Days** field to set the length that a trial account will function. If you leave this field bank and have selected a Service Plan type of "Trial", the value will of this field will default to 30 days.

Num of Trial Days: ☉
Hard Quota MB: ☉
User Quota MB: ☉
Notify User via Email: ☑ ☉ *

11. Use the **Hard Quota MB** field to specify the maximum amount of storage allocated to this account in megabytes. If left blank, this field defaults to infinite for non-trial account or 512MB for trial accounts. The system uses "-1" to represent an infinite amount of storage.

⚠ *Multiply the number of GB by 1024 to get the number of MB.*

⚠ *It is important to note that the* **Hard Quota MB** *field in a parent account is the total amount of storage that will be allowed for the parent account plus all of it's sub-accounts.*

⚠ *If the storage limit is reached during a backup, the backup process will stop and the system will issue error messages in the backup log, notifying you via email according to the settings on the Notifications tab of the Options page in the backup manager. As an alternative to configuring a disk usage quota, you can setup a Total Disk Usage notification for the account. With this strategy, you will still be emailed when the account goes over their desired amount, but their backups will not actually fail.*

12. The **User Quota MB** field is typically left blank. The user can use this field to set their own limits.

⚠ *The actual quota is the minimum of the two quotas (***Hard Quote MB*** and ***User Quota MB***) and of the amount of disk usage remaining under the parent account.*

13. Leave the **Notify User via Email** box checked if you want the user to receive an email once this account is created.

14. Press the *Add User* button.

[Add User]

⚠ *If the system finds a mistake in the account information you are trying to save, you will be returned to the Create New Customer / Account page.*

⚠ *Once the system has accepted the new account information, a confirmation page like the one shown below will be displayed. If requested, a Welcome New Account email message will also be sent to the contact.*

Create New Customer / Account

OPERATION RESULTS

The new account has been created. The customer has been notified via email to ETV@youremailsystem.com.

Account Number:	DOC30199002
User Name:	ETV-FrontOffice
Password:	(linked to the password of the parent account)

3-4 Adding another Service Plan for an Existing Customer

The type of Service Plan for all sub-accounts will be inherited from it's parent account. If a customer wants to have Select, Basic and Trial accounts they will need three parent accounts (one to group the Select accounts, one to group the Basic accounts and one to group the Trial accounts). Note that typically a customer will never have more than two parent accounts (Select and Basic), but may need a trial account if they want to test out email archiving services, for example.

Every account (parent or sub-account) should always be associated with the backup of only one computer--using an account to backup more than one computer is not supported and can cause problems. As there is no charge for additional sub-accounts, there is no advantage to using the same account on more than one computer.

Due to cost, a customer may want to utilize both the Basic Service Plan and the Select Service Plan for a single computer. This is done by defining two accounts where each account represents one type of backup scenario. For example, a Basic account can be used to automatically backup all data that has not been modified in the last year, and a Select account can be used to backup all data that has been modified in the last year, and data can automatically migrate from the Select account to the Basic account as the data ages.

⚠️ *There is a Knowledge Base article entitled "How do I configure more than one account on a single computer" that will guide you through this process.*

Creating another parent account for an existing customer:

1. Choose **Accounts > Create Account**. This opens the Create New Customer / Account page.

2. Using the **New Customer?** field select "Existing Customer" when you want to define a new account for an existing customer.

⚠️ *Place your mouse over the 🔵 to see field description.*

⚠️ *Any field marked with an asterisk (*) is a required field.*

3. From the list of your customers in **Existing Customer**, select which customer that this account is to be added to. The list will show all of the customers that you have already created.

Existing Customer: | <select one> | ▼ | 🔵 | *

4. Select "Existing Contact" in the **New Contact?** field and the contact information for this account will be the same as in the parent account. If this account requires a different contact, select "New Contact" and the contact fields will be displayed, pre-filled with the contact information from the customer record. Most customers will use the same contact for all of their accounts.

CONTACT INFORMATION

If another person is responsible for the account please select "New Contact" and change the appropriate information. Otherwise the contact information will be linked with the parent account's information.

New Contact? | Existing Contact | ▼ | 🔵 | *
New Contact
Existing Contact

5. Enter the Account Information starting with the **Parent Account ID** field. Set the **Parent Account ID** field to "(none)" to define this account as a new parent account for this customer.

ACCOUNT INFORMATION

You are creating a new account for an existing customer. In almost all cases you will want to create this new account as a sub-account. Please select the account that will be the parent account for this sub-account.

Parent Account ID: | (none) | ▼ | 🔵 | *

6. Select the type of service plan you want associated with this parent account by using the **Service Plan** field ("Select", "Basic", or "Trial").

Service Plan: | Basic: Basic #GB=0 QuotaMB=-1 Cmp=0 | ▼ | 🔵 | *

7. Use the **User Name** field to enter a descriptive name that helps you identify which computer is associated with this account. The **User Name** is not a required field, however, if you do not create a user name then the system will generate one for you based on the account number.

User Name: | ETV-Shop

⚠ *The **User Name** must be universally unique across all accounts (even accounts you don't own). To increase the likelihood of a unique name, try combining customer name with computer description: "ETV-BackOffice", "ETV-FrontOffice", "ETV-SalesLaptop01", or "CraigsVac-Billing".*

8. You have the option to change the password in the **Password** field.

New Password: | tra4nacechi5 | *
Generate Random Password
Must Change Pwd: | ☑ | *

9. When the **Must Change Pwd** box is checked the system makes the password a temporary password. The temporary password will be emailed to the contact person listed on the account. The first time the user logs in, the system will require them to enter a new password.

⚠ *We recommend that you use a temporary password that is easy to type and easy to remember. Keep the **Must Change Pwd** box checked. This will force the user to pick a new password that they will have to remember.*

10. Use the **Description** field to record any information regarding this account. This information can be seen by the user.

Description: | Computer in rear shop.
Internal Desc: | Wants Basic Service Plan - Initially

11. Use the **Internal Desc** field to record any information regarding this account that you do not want the user to be able to see.

12. Use the **Num of Trial Days** field to set the length that a trial account will function. If you leave this field bank and have selected a Service Plan type of "Trial", the value will of this field will default to 30 days.

Num of Trial Days: |
Hard Quota MB: |
User Quota MB: |
Notify User via Email: | ☑ | *

13. Use the **Hard Quota MB** field to specify the max amount of storage allocated to this account in megabytes. If left blank, this field defaults to infinite for non-trial account or 512MB for trial accounts. The system uses "-1" to represent an infinite amount of storage.

⚠️ *Multiply the number of GB by 1024 to get the number of MB.*

⚠️ *It is important to note that the **Hard Quota MB** field in a parent account is the total amount of storage that will be allowed for the parent account plus all of it's sub-accounts.*

⚠️ *If the storage limit is reached during a backup, the backup process will stop and the system will issue error messages in the backup log, notifying you via email according to the settings on the Notifications tab of the Options page in the backup manager. As an alternative to configuring a disk usage quota, you can setup a Total Disk Usage notification for the account. With this strategy, you will still be emailed when the account goes over their desired amount, but their backups will not actually fail.*
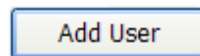
14. The **User Quota MB** field is typically left blank. The user can use this field to set their own limits.

⚠️ *The actual quota is the minimum of the two quotas (**Hard Quote MB** and **User Quota MB**) and of the amount of disk usage remaining under the parent account.*

15. Leave the **Notify User via Email** box checked if you want the user to receive an email once this account is created. If the **Must Change Pwd** box was checked, making the password temporary, the temporary password will be included in the Welcome New Account email. If the password is not temporary, it will not be included in the Welcome New Account email.

16. Press the *Add User* button.

Add User

⚠️ *If the system finds a mistake in the account information you are trying to save, you will be returned to the Create New Customer / Account page.*

⚠️ *Once the system has accepted the new account information, a confirmation page like the one shown below will be displayed. If requested, a Welcome New Account email message will also be sent to the contact.*

Create New Customer / Account

OPERATION RESULTS

The new account has been created. The customer has been notified via email to ETV@youremailsystem.com.

Account Number:	DOC30199003
User Name:	ETV-Shop
Password:	thasaja7pradila

3-5 Creating a Trial Account

To create a customer you must create the initial parent account and often the first account for a new customer is set up as a Trial Account. The Service Plan for an account defines the feature set of that account. A Trial Service Plan has the same features of the Select Service Plan, in that they both allow for an infinite number of backup versions and gives the user the ability to backup open files on server operating systems, such as Microsoft® Exchange and SQL Server data. You can set the duration for a trial account to be 60 days or less (30 days is the default). The maximum storage for a trial account is configurable, but defaults to 512MB.

If the customer chooses to sign up, the trial account can easily be converted to a Select account. The customer could also choose to downgrade the feature set to a Basic account (although this is unlikely). Either way changing a trial account to a permanent account is fairly straight forward.

If it is necessary to setup more than one trial account for the same customer, you would need to create a sub-account for each subsequent computer that customer wants to add to their trial. Follow the steps under the topic "Creating a Sub-Account for an Existing Customer" making sure you link the new sub-accounts to this trial parent account. Every account (parent account or sub-account) must be associated with the backup of only a single computer. As there is no charge for additional sub-accounts, there is no advantage to using the same account on more than one computer, and doing so can cause problems.

Creating a customer with a trial account:

1. Choose **Accounts > Create Account**. This opens the Create New Customer / Account page.

Home	My Account	Accounts	Reports	Support
🏠👤🔍ⓔ		Account List		
	Accou	Create Account		

2. Using the **New Customer?** field select "New Customer" when you want to define a new billing entity. A new customer is defined by creating that customer's first parent account.

CUSTOMER INFORMATION

New Customer? | New Customer | ⓔ *
New Customer
Existing Customer

⚠️ *Place your mouse over the* ⓔ *to see field description.*

⚠️ *Any field marked with an asterisk (*) is a required field.*

3. Select the **Brand** that you want to use for this customer. The brand affects the brand displayed in the software running on the client's system, and the logos and the product name visible in the Web Portal. The list will show all of your pre-defined brands (most partners will have only a single brand).

Brand: [doc (Professional Resellers, Inc.): ▼] ❓ *

4. Supply the contact information for this new customer.

CONTACT INFORMATION

Company Name:	Antique Emporium ❓
First Name:	Hallie ❓ *
Last Name:	Thompson ❓ *
Email Address:	AntEmp@youremailsystem.com ❓ *
Phone Number:	724/555-3348 ❓
Phone Number (Night):	724/555-5548 ❓
Phone Number (Mobile):	330/555-2248 ❓
Phone Number (Other):	❓
Fax Number:	❓
Address Line 1:	92 South Avenue ❓ *
Address Line 2:	
City:	New Castle *
State:	PA *
Zip:	16105 *
Country:	United States ▼ ❓ *
Time Zone:	-5:00: US/Eastern: 1 Eastern Standard (US/Easte ▼ ❓ *

⚠️ *The single address in the **Email Address** field is the address that will be used when the Welcome New Account message is sent. Partners that are set-up as Managed Service providers will most likely want to use their own email address here instead of the customer's email address.*

5. Enter the Account Information starting with the **Service Plan** field. Select "Trial" the type of **Service Plan**.

ACCOUNT INFORMATION

Service Plan: `Trial: Trial accounts #GB=1 QuotaMB=512 Cmp=` ▾ ? *

6. Select the name of the company that referred this customer using the **Referring Partner** field. This field is normally left "(none)". Leave this field unchanged and the system will default to your company name. Even if this field is set to "(none)" it will still be associated with your partnership, because it is associated with your brand.

Referring Partner: `(none)` ▾ ? *

7. Use the **User Name** field to enter a descriptive name that helps you identify which computer is associated with this account. The **User Name** is not a required field, however, if you do not create a user name then the system will generate one for you based on the account number.

User Name: `AntEmp-Server` ?

⚠️ *The **User Name** must be universally unique across all accounts (even accounts you don't own). To increase the likelihood of a unique name, try combining customer name with computer description: "ETV-BackOffice", "ETV-FrontOffice", "ETV-SalesLaptop01", or "CraigsVac-Billing".*

8. You have the option to change the password in the **Password** field.

New Password: `tra4nacechi5` ? *
`Generate Random Password` ?
Must Change Pwd: ☑ ? *

9. When the **Must Change Pwd** box is checked the system makes the password a temporary password. The temporary password will be emailed to the contact person listed on the account. The first time the user logs in, the system will require them to enter a new password.

⚠️ *We recommend that you use a temporary password that is easy to type and easy to remember. Keep the **Must Change Pwd** box checked. This will force the user to pick a new password that they will have to remember.*

10. Use the **Description** field to record any information regarding this account. This information can be seen by the user.

Description: | Server located at register.

Internal Desc: | Will need some help with set-up.

11. Use the **Internal Desc** field to record any information regarding this account that you do not want the user to be able to see.

12. Use the **Num of Trial Days** field to set the length that a trial account will function. If you leave this field bank and have selected a Service Plan type of "Trial", the value of this field will default to 30 days.

Num of Trial Days: |

Hard Quota MB: |

User Quota MB: |

Notify User via Email: ☑ *

13. Use the **Hard Quota MB** field to specify the max amount of storage allocated to this account in megabytes. If left blank, this field defaults to infinite for non-trial account or 512MB for trial accounts. The system uses "-1" to represent an infinite amount of storage.

⚠ *Multiply the number of GB by 1024 to get the number of MB.*

⚠ *It is important to note that the **Hard Quota MB** field in a parent account is the total amount of storage that will be allowed for the parent account plus all of it's sub-accounts.*

⚠ *If the storage limit is reached during a backup, the backup process will stop and the system will issue error messages in the backup log, notifying you via email according to the settings on the Notifications tab of the Options page in the backup manager. As an alternative to configuring a disk usage quota, you can setup a Total Disk Usage notification for the account. With this strategy, you will still be emailed when the account goes over their desired amount, but their backups will not actually fail.*

14. The **User Quota MB** field is typically left blank. The user can use this field to set their own limits.

⚠ *The actual quota is the minimum of the two quotas (**Hard Quote MB** and **User Quota MB**) and of the amount of disk usage remaining under the parent account.*

15. Leave the **Notify User via Email** box checked if you want the user to receive an email once this account is created. If the **Must Change Pwd** box was checked, making the password temporary, the temporary password will be included in the Welcome New Account email. If the password is not temporary, it will not be included in the Welcome New Account email.

16. Press the *Add User* button.

Add User

⚠ *If the system finds a mistake in the account information you are trying to save, you will be returned to the Create New Customer / Account page.*

⚠ *Once the system has accepted the new account information, a confirmation page like the one shown below will be displayed. If requested, a Welcome New Account email message will also be sent to the contact.*

Create New Customer / Account

OPERATION RESULTS

The new account has been created. The customer has been notified via email to AntEmp@youremailsystem.com.

Account Number:	DOC16105001
User Name:	AntEmp-Server
Password:	phiwri8gukofro2
Trial Expires:	2009-03-06 02:01:28

4-1 Overview: Using the Account List Page

This chapter describes how to use the Account List page to view, update and manage your customer accounts.

The different sections of the Account List page are covered under the following three topics:

- Searching the Account List: see "Searching the Account List"

- Accounts Matching Search Criteria: see "Using the Account List"

- Export Data: see "Exporting Data from the Account List"

Searching the Account List gives you the ability to specify a subset of your accounts to work with, a feature that will be more helpful as your number of customers increase. The Search Filter allows you to define both simple and complex queries using basic operations.

The account list displays the resulting subset of accounts specified by the search filter. From the account list you can review account configuration, backup status, storage utilization, and contact information. The account list also features embedded operations that allow you to quickly change account information, review log files, and it provides you with the ability impersonate a customer's account. Impersonation is used to change contact information and notification settings for one of your customer's accounts.

While the Web Portal has several predefined reports that can export account data, the Account List also features an export feature. Account data can be exported in several formats allowing the data to be viewed and manipulated by various third-party software packages. Formats include Excel, CSV, and XML.

To open the Account List page, choose **Accounts > Account List** off the main menu bar.
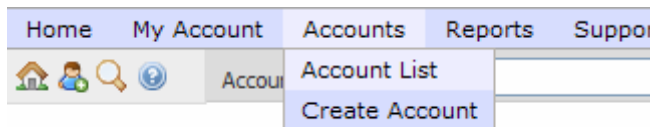
4-2 Searching the Account List

The first functional area of the Account List page is the "Search Criteria" and it allows you to define a search/filter phrase to be applied to your entire list of accounts. This feature will allow you to view accounts based on their characteristics and give you the ability look at a smaller sub-group of accounts.

To open the Account List page, choose **Accounts > Account List** off the main menu bar.
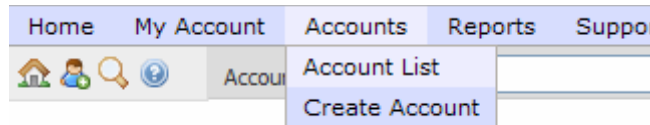
You can also quickly search for an account by user name, account number, first or last name, or email address, by using the Account Quick Search bar immediately below the main menu bar. This is the quickest and most convenient way to search for one particular account or customer.

The functionality of the Search Criteria feature and several examples are covered in this topic.

The additional sections of the Account List page include:

- Accounts Matching Search Criteria: see "Using the Account List"

- Export Data: see "Exporting Data from the Account List"

The Search / Filter feature:

Use the fields and buttons under the heading Search Criteria to define what accounts will be displayed in the account list. The use of these fields is optional, but will become more useful as your list of customers and accounts increases.

Search Criteria

Use these fields to search for accounts to display in the list below.

You can use the wildcards * and ? for the CONTAINS, LIKE, and NOT LIKE operators. When using the IN operator, separate values by commas. The format of all date/time fields is YYYY-MM-DD HH:MM:SS.

Show 3 search fields.

▾		▾	CONTAINS	▾		▾	AND	▾
▾		▾	CONTAINS	▾		▾	AND	▾
▾		▾	CONTAINS	▾		▾	

☑ Hide deleted accounts

| Search / Filter | Clear Search Fields |

The Show box will increase or the number of lines displayed for defining a search of the Account List. Each line allows you to define one segment of the search/filter phrase. You do not need to use all of the lines displayed. Blank lines will be ignored.

Show 3 search fields.

Each line contains five to six fields that can be used to define one segment of the search/filter phrase. Fields Ⓐ and Ⓔ allow you to select either a blank or a parentheses. Using the parentheses will help you control the order of operations when the system evaluates the search/filter phrase.

Field Ⓑ contains a predefined list of field names to choose from. These variable names correspond to the column headings displayed in the Account List and/or in the contact information. These are the fields you can search against to find specific accounts.

```
-------------------------------
Brand Name
Account Number
User Name
Parent Account Number
Parent Account's User Name
-------------------------------
```

← Ⓑ

| ▾ | | ▾ | CONTAINS | ▾ | | ▾ | AND | ▾ |

Search/Filter Variable Name	Account List Column Name	Field Format	General Description
Brand Name	**Brand**	text	unique identifier of the brand name
Account Number	**Account No**	text (11 characters)	account number used for billing (brandID + zip[5] + number of accounts in that zip code [3])
User Name	**User Name**	text	unique name for this account, used as a login id
Parent Account Number	**PID**	numeric	ID of this account's parent account. If set to "0", this is a parent account.
Parent Account's User Name	**User Name** (of parent account)	text	user name of the parent account
Role Name	**Role**	<blank>, User, Power User, Partner Read-Only, Partner Customer Service, Partner Senior Customer Service, Partner Senior Manager, Partner API	security setting for the user of an account
Service Plan Name	**SPlan**	Basic, Select, Trial, Gold Partner, Platinum Partner, Partner's Partner	name of service plan
Expiration Date	**Expires**	YYYY-MM-DD HH:MM:SS	date a trial account is to expire
Disk Usage (MB)	**Disk GB**	numeric	The disk space required for this account - before compression.
Compressed Disk Usage (MB)	**Disk GB** Compressed usage is displayed as [C:x.x]	numeric	The disk space required for this account - after compression. The display of compressed disk usage is a feature that is enabled on an account by account basis.
All Disk Usage (MB)	**All Disk GB**	numeric	The disk space required for the parent account plus all of its sub-accounts - before compression.
All Compressed Disk Usage (MB)	**All Disk GB** Compressed usage is displayed as [C:x.x]	numeric	The disk space required for the parent account and all of its sub-accounts - after compression. The display of compressed disk usage is a feature that is enabled on an account by account basis.
# Provisioned Mailboxes	**Mailboxes**	numeric	number of mailboxes provisioned for an account
# Billable Mailboxes	**Mailboxes**	numeric	number of mailboxes used by an account
# Billable Mailboxes (w/ subaccounts)	**Mailboxes**	numeric	total number of mailboxes used in the parent account, plus all of its sub-accounts
Company Name	**Company**	text	company name as defined in the contact information for an account

First Name	**Name** (Last, Fist)	text	first name as defined in the contact information for an account
Last Name	**Name** (Last, First)	text	last name as defined in the contact information for an account
Phone Number	<not displayed>	xxx-xxx-xxxx	phone number of the contact listed for an account
Address 1	<not displayed>	text	first line of the address as defined in the contact information for an account
City	**City**	text	city as defined in the contact information for an account
State	**State**	text	state as defined in the contact information for an account
Zip Code	**Zip** (without country ID)	text	zip as defined in the contact information for an account
Email Address	Displayed as Tool Tip for **Name**	text	email address from the contact information
Internal Description	**Internal Desc.**	text	description field that can only been seen by partner's staff
User Description	**User Desc.**	text	description field that can be seen and modified by the customer
Disabled	**DIS**	1 (Yes), 0 (No)	"1" if this account has been disabled. "0" if account is active.
Invalid Logins	**Failed Logins**	numeric	number of failed login attempts since the last successful login
Last Backup Date	**LstBck [TZ]**	YYYY-MM-DD HH:MM:SS	date of the last attempted backup
Creation Date	**Created [TZ]**	YYYY-MM-DD HH:MM:SS	date an account was created
Deleted Date	**DEL**	YYYY-MM-DD HH:MM:SS	date an account was deleted
ID: Internal Account ID	**ID**	numeric	unique account ID number
PID: Internal Parent Account ID	**PID**	numeric	account ID of an account's parent account, set to "0" for all parent accounts
CID: Internal Customer ID	**CID**	numeric	unique ID assigned to each customer

Fields Ⓒ and Ⓓ work in conjunction with field Ⓑ. Field Ⓒ contains a pre-defined list of operators to choose from. These operators determine how the contents of field Ⓓ are compared against the variable in field Ⓑ.
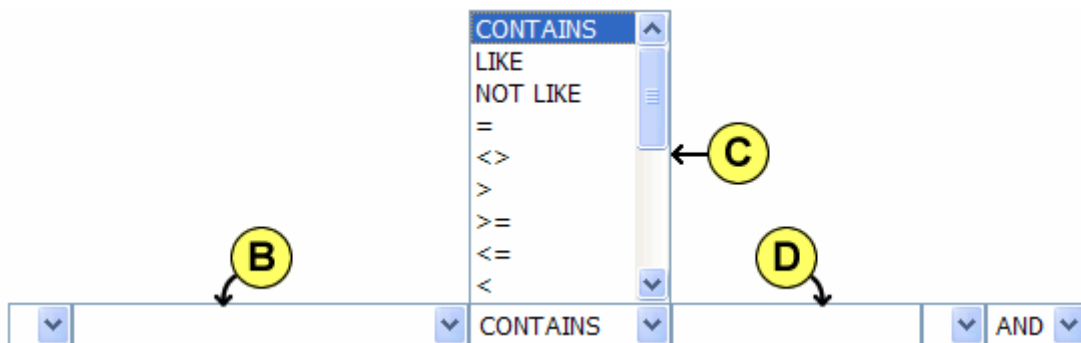
In the following simple example, we are looking for all accounts where the **Company Name** contains the string "Eddie":

	Company Name		CONTAINS		Eddie		AND
			CONTAINS				AND
			CONTAINS				

☐ Hide deleted accounts

The resulting Account List shows only the 5 accounts (the "Hide deleted accounts" box was left unchecked) were the company name contains the string "Eddie":

Number of rows matching filter: 5

	ID	PID <	CID	Brand	Account No	User Name		Company	N
[X]	356	0 [S]	342	doc	DOC30199001 [I]	ETV-Primary [S]	[S]	Eddie's TV Repair	Jo
[X]	359	356 [S]	342	doc	|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Eddie's TV Repair	J
[X]	368	356 [S]	342	doc	|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Eddie's TV Repair	Jo
[R]	369	356 [S]	342	doc	|-- DOC30199005 [I]	ETV-Truck02 [S]	[	Eddie's TV Repair	Jon
[X]	360	0 [S]	342	doc	DOC30199003 [I]	ETV-RepairShop [S]	[S]	Eddie's TV Repair	Jo

Search/Filter Operator Name	Field Format	General Description
CONTAINS	text	matches if the target string is contained within the source string
LIKE	text fields	matches if text matches the supplied pattern - can use "*" and "?" in the pattern specification
NOT LIKE	text fields	matches if text does not match the supplied pattern - can use "*" and "?" in the pattern specification
=	numeric	matches if the numeric values are equal
<>	numeric fields	matches if the numeric values are not equal
>	numeric fields	matches if the target number is greater than the source number
>=	numeric fields	matches if the target number is greater than or equal to the source number
<=	numeric fields	matches if the target number is less than or equal to the source number
<	numeric fields	matches if the target number is less than the source number
IS NULL	date fields	matches if there is no value in the date field
IS NOT NULL	date fields	matches if there is a value in the date field

Field (F) contains a pre-defined list of field conjunction operators to choose from. These conjunctions allow you to join multiple segments into a longer, more complex search/filter phrase.

		CONTAINS			AND
				(F) →	AND
					OR

In the following simple example, we are looking for all accounts where the **Company Name** contains the string "Eddie" and the **User Name** contains the string "Truck":

	Company Name	CONTAINS	Eddie		AND
	User Name	CONTAINS	Truck		AND
		CONTAINS			

☐ Hide deleted accounts

The resulting Account List would show only 2 accounts (the "Hide deleted accounts" box was left unchecked):

Number of rows matching filter: 2

	ID	PID <	CID	Brand	Account No	User Name		Company	N.
[X]	368	356 [S]	342	doc	|-- DOC30199004 [I]	ETV-Truck01 [S]	[S	Eddie's TV Repair	Jo
[R]	369	356 [S]	342	doc	|-- DOC30199005 [I]	ETV-Truck02 [S]	[S	Eddie's TV Repair	Jon

Search / Filter Examples:

The following are several examples using the Search/Filter Criteria and the resulting Account List:
- Find all accounts with a Basic type of service plan
- Find all trial accounts that expire before a specific date
- Find all accounts were the last name of the contact contains the string "kow"
- Find all accounts were the service plan type does not end in "Partner"
- Find all the accounts that were created in February, 2009
- Find only the parent accounts for a specific customer

Find all accounts with a Basic type of service plan:

	Service Plan Name	CONTAINS	Basic		AND
		CONTAINS			AND
		CONTAINS			

☑ Hide deleted accounts

of rows matching filter: 4

PID <	CID	Brand	Account No	User Name	Role	SPlan	Company
0 [S]	348	doc	DOC30312001 [I]	YT1300 [S]	[S]	Basic [S]	Atalka LLC
0 [S]	344	doc	DOC10001001 [I]	Jamesons [S]	[S]	Basic [S]	Jameson Financial Group
0 [S]	349	doc	DOC19106001 [I]	kowaltski4 [S]	[S]	Basic [S]	Joe's Plumbing
0 [S]	345	doc	DOC07004001 [I]	eLite [S]	[S]	Basic [S]	eLite Solutions

Find all trial accounts that expire before a specific date:

	Expiration Date		<		2009-03-07 00:00:00		AND
			CONTAINS				AND
			CONTAINS				

☑ Hide deleted accounts

nber of rows matching filter: 2

ID	PID <	CID	Brand	Account No	User Name	Role	SPla	Expires [EST]
367	0 [S]	351	doc	DOC16105001 [I]	AntEmp-Server [S]	[S]	Trial	2009-03-05 09 pm [S]
366	0 [S]	350	doc	DOC30068001 [I]	mrvandemar [S]	[S]	Trial	2009-03-05 04 pm [S]

Find all accounts were the last name of the contact contains the string "kow":

	Last Name		LIKE		*kow*		AND
			CONTAINS				AND
			CONTAINS				

☑ Hide deleted accounts

	ID	PID <	CID	Brand	Account No	User Nam	Company	Name	City
[X]	365	0 [S]	349	doc	DOC19106001 [I]	kowaltski4	Joe's Plumbing	Kowaltski, Joe [E]	Ph.

Find all accounts were the service plan type does not end in "Partner":

	Service Plan Name		NOT LIKE		*Partner		AND
			CONTAINS				AND
			CONTAINS				

☑ Hide deleted accounts

	ID	PID <	CID	Brand	Account No	User Name	Role	SPlan
[X]	367	0 [S]	351	doc	DOC16105001 [I]	AntEmp-Server [S]	[S]	Trial [S]
[X]	364	0 [S]	348	doc	DOC30312001 [I]	YT1300 [S]	[S]	Basic [S]
[X]	363	0 [S]	347	doc	DOC80214001 [I]	xtremefx [S]	[S]	Select [S]
[X]	356	0 [S]	342	doc	DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]
[X]	359	356 [S]	342	doc	|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select
[X]	368	356 [S]	342	doc	|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select
[X]	360	0 [S]	342	doc	DOC30199003 [I]	ETV-RepairShop [S]	[S]	Trial [S]
[X]	358	0 [S]	344	doc	DOC10001001 [I]	Jamesons [S]	[S]	Basic [S]
[X]	365	0 [S]	349	doc	DOC19106001 [I]	kowaltski4 [S]	[S]	Basic [S]
[X]	357	0 [S]	343	doc	DOC96703001 [I]	mohalo1 [S]	[S]	Select [S]

Find all the accounts that were created in the month of February, 2009:

˅	Creation Date	˅	LIKE	˅	2009-02-*	˅	AND ˅
˅		˅	CONTAINS	˅		˅	AND ˅
˅		˅	CONTAINS	˅		˅	

☑ Hide deleted accounts

	ID	PID <	CID	Brand	Account No	User Name	Created [EDT]	DEL
[X]	367	0 [S]	351	doc	DOC16105001 [I]	AntEmp-Server [S]	2009-02-03	No
[X]	364	0 [S]	348	doc	DOC30312001 [I]	YT1300 [S]	2009-02-03	No
[X]	363	0 [S]	347	doc	DOC80214001 [I]	xtremefx [S]	2009-02-03	No
[X]	356	0 [S]	342	doc	DOC30199001 [I]	ETV-Primary [S]	2009-02-03	No
[X]	359	356 [S]	342	doc	|-- DOC30199002 [I]	ETV-FrontOffice [S]	2009-02-03	No
[X]	368	356 [S]	342	doc	|-- DOC30199004 [I]	ETV-Truck01 [S]	2009-02-13	No
[X]	360	0 [S]	342	doc	DOC30199003 [I]	ETV-RepairShop [S]	2009-02-03	No
[X]	358	0 [S]	344	doc	DOC10001001 [I]	Jamesons [S]	2009-02-03	No
[X]	365	0 [S]	349	doc	DOC19106001 [I]	kowaltski4 [S]	2009-02-03	No
[X]	357	0 [S]	343	doc	DOC96703001 [I]	mohalo1 [S]	2009-02-03	No

Find only the parent accounts for a specific customer:

˅	Company Name	˅	CONTAINS	˅	Eddie	˅	AND ˅
˅	PID: Internal Parent Account ID ˅	=	˅	0	˅	AND ˅
˅		˅	CONTAINS	˅		˅	

☐ Hide deleted accounts

Number of rows matching filter: 2

	ID	PID <	CID	Brand	Account No	User Name		Company
[X]	356	0 [S]	342	doc	DOC30199001 [I]	ETV-Primary [S]		Eddie's TV Repair
[X]	360	0 [S]	342	doc	DOC30199003 [I]	ETV-RepairShop [S]		Eddie's TV Repair

4-3 Using the Account List

This chapter describes how to use the Account List, as well as how to make modifications to your accounts using the embedded operation-buttons available in each row in the account list.

To open the Account List page, choose **Accounts > Account List** off the main menu bar.
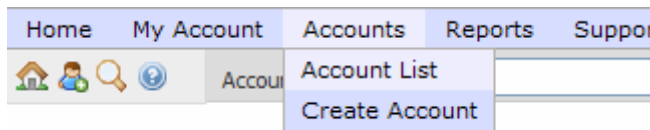
The first functional area on the Account List page is used for searching and filtering the displayed account list. This feature was covered in detail in the previous topic "Searching the Account List."

The second functional area is the display of the account list and is covered in detail in under this topic.

The third functional area is exporting data from the account list and is covered in the next topic "Exporting Data from the Account List."

**Customizing the Account List display:**

Use the fields and buttons under the heading Account List to define how the account list will be displayed. The use of these fields is optional, but will become more useful as the number of your of customers and accounts increases.

1. The Refresh link next to the Account List title will allow you to refresh the list of accounts any time you make a change to the search / filter parameters or if you want to see if any new accounts have been added since you entered this page.
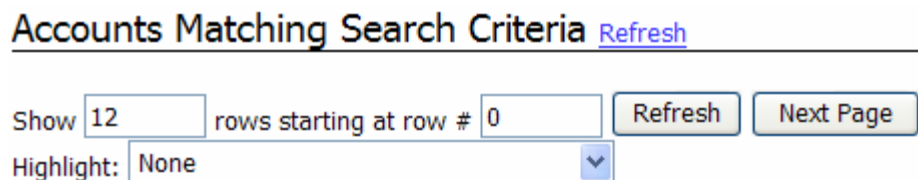
2. The **Show** box allows you to enter the maximum number of rows you want displayed on a single page.

3. The **row #** box allows you to specify the first row that should be displayed from the list of accounts matching the search criteria (the first row is numbered 0). Normally this field is adjusted automatically as you click the *Previous Page* and *Next Page* buttons.

4. Pressing the *Refresh* button will cause the account list to be re-displayed based on the parameters you have just defined. It will also cause the list to display any new accounts that have been added since you entered this page.

Refresh
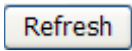
5. Use the *Previous Page* and *Next Page* buttons to move across multiple pages of account information.

Prev Page   Next Page

6. Use the **Highlight** field to identify the accounts you want displayed with a light red background.

Highlight: None
None
No backup within interval
No backup within interval and no alert
Never backed up

Highlight Option	Description
None (default)	Do not highlight any accounts.
No backup within interval	Highlight accounts that have not had a backup within the first interval shown in the **NoBk Days** column.
No backup within interval and no alert	Highlight accounts that have not had a backup within the first interval shown in the **NoBk Days** column and have not been alerted yet (**NoBk Sent [EST]** is set to blank).
Never backed up	Highlight accounts that have never been backed up (**Lst Bck [EST]** is set to "Never").

In the following example, a **Highlight** of "Never backed up" was selected. The two records for ETV-Truck01 and ETV-Truck02 are displayed with a light red background.

	ID	PID <	CID	Brand	Account No	User Name	Role	SPlan	Lst Bck [EST
[X]	356	0 [S]	342	doc	DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]	✔ 2009-02-2.
[X]	359	356 [S]	342	doc	|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select	✔ 2009-02-2.
[X]	368	356 [S]	342	doc	|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select	Never
[X]	369	356 [S]	342	doc	|-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select	Never
[X]	360	0 [S]	342	doc	DOC30199003 [I]	ETV-RepairShop [S]	[S]	Trial [S]	✔ 2009-02-2(

eated [EST]	DEL	NoBk Sent [EST]	NoBk Days	Server ID	Internal De
J09-02-03	No		3 / 7	10071014: eFolderR7.efoldering.com	For critical bu.
09-02-03	No		3 / 7	20010010: r1.slc.efoldering.com	Used for dail/
J09-02-13	No	2009-02-17	3 / 7	20011008: r1.slc.efoldering.com	Backup when
009-02-13	No	2009-02-17	3 / 7	10071004: eFolderR7.efoldering.com	Backup when
009-02-03	No		3 / 7	10071003: eFolderR7.efoldering.com	Wants only B.

The Resulting Account List:

When looking at the resulting list of accounts, you will notice that the display is very long. The list of accounts shows 30 significant fields for each account. Many of those fields also have embedded operation-buttons. There are approximately 11 different operations (some operation-buttons require a specific security role setting in order for them to be displayed) all designated by square parentheses and shown in blue text, i.e. [S]. These operation-buttons will be discussed in reference to fields that they are displayed with.

Every other row in the table is displayed with a light gray background. There is no significance to this background color change, this variation was only done to make the list more readable. However, rows shown with a dark gray background signify records that have been deleted.

Number of rows matching filter: 5

	ID	PID ≤	CID	Brand	Account No	User Name	Role	SPlan	Lst B
[X]	356	0 [S]	342	doc	DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]	✔ 20
[X]	359	356 [S]	342	doc	|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select	✔ 2
[X]	368	356 [S]	342	doc	|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select	✔ 20
[R]	369	356 [S]	342	doc	|-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select	Nev
[X]	360	0 [S]	342	doc	DOC30199003 [I]	ETV-RepairShop [S]	[S]	Trial [S]	✔ 2

Storage Mode Icons may appear in the Account List under the column headings for Last Backup (**Lst Bck [EST]**), Disk Space (**Disk GB**), All Disk Space (**All Disk GB**), and Disk Space Quota (**Quota GB**).

Storage Mode Icons are used to indicate accounts that are using multiple storage methods. A separate line is displayed for each type of backup storage used and an icon designates if the backup is being stored remotely, on a local server, or on a local disk drive. If no icon is displayed all then all backup data is stored remotely.

Storage Mode Icon	Storage Mode Indication
<blank>	only remote backup storage is being used
🌐	remote backup storage is being used, as well as a second method
🖥	backed up data for this account is being stored on a local backup server
💾	backup is being stored on a local disk drive

Sorting the Resulting Account List:

By default the account list is sorted by PID (which groups sub-accounts with their parent accounts). You can have the list sorted by any field simply by clicking on that column heading. That heading is then displayed in green text and has a less-than symbol next to it. Clicking a heading a second time will cause the list to sort by that field in reverse order, and a greater-than symbol will be display to indicate the reverse sort order.

ID	PID		CID	Brand	Account No		User Name <		Role	SPlan	
[X]	367	0 [S]	351	doc	DOC16105001 [I]		AntEmp-Server [S]		[S]	Trial [S]	
[X]	359	356 [S]	342	doc	DOC30199002 [I]		ETV-FrontOffice [S]		[S]	Select	
[X]	356	0 [S]	342	doc	DOC30199001 [I]		ETV-Primary [S]		[S]	Select [S]	
[X]	360	0 [S]	342	doc	DOC30199003 [I]		ETV-RepairShop [S]		[S]	Trial [S]	

Each of the Column headings can display a tooltip to give you a quick reminder of the purpose of that field. Place you mouse over the heading and wait for a moment and the tooltip will appear.

ID	PID <		CID	Brand	Account No		User Name		Role	SPlan	
[X]	367	0 [S]							[S]	Trial [S]	
[X]	364	0 [S]							[S]	Basic [S]	
[X]	363	0 [S]	347	doc	DOC80214001 [I]		xtremefx [S]		[S]	Select [S]	
[X]	356	0 [S]	342	doc	DOC30199001 [I]		ETV-Primary [S]		[S]	Select [S]	

Internal Account ID of parent account (sort by this column to group sub-accounts with their parents)

Description of Fields 1-6:

ID	PID <		CID	Brand	Account No	
[X]	356	0 [S]	342	doc	DOC30199001 [I]	E
[X]	359	356 [S]	342	doc	|-- DOC30199002 [I]	E
[X]	368	356 [S]	342	doc	|-- DOC30199004 [I]	E
[R]	369	356 [S]	342	doc	|-- DOC30199005 [I]	ET
[X]	360	0 [S]	342	doc	DOC30199003 [I]	E
[X]	358	0 [S]	344	doc	DOC10001001 [I]	
[X]	365	0 [S]	349	doc	DOC19106001 [I]	k
[X]	357	0 [S]	343	doc	DOC96703001 [I]	m
[X]	353	0 [S]	336	doc	DOC30341001 [I]	F
[X]	354	353 [S]	336	doc	|-- DOC30341002 [I]	A

Delete / Restore

The first column of the Account List represents the status of an account. One of two operation-buttons are displayed in this column ([X], [R]). If [X] is displayed this indicates that this account is active, and pressing [X] will delete the account.   If [R] is displayed then this account has been deleted and can be reactivated by pressing this operation-button.

Delete an Account [X]

The Delete operation-button, [X], allows you to delete (or deactivate) an account.

Number of rows matching filter: 5

	ID	PID <	CID	Brand	Account No	User Name	Role	SPlan
[X]	356	0 [S]	342	doc	DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]
[X]	359	356 [S]	342	doc	|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select
[X]	368	356 [S]	342	doc	|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select
[X]	369	356 [S]	342	doc	|-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select
[X]	360	0 [S]	342	doc	DOC30199003 [I]	ETV-RepairShop [S]	[S]	Trial [S]

⚠️ *Deleting a parent account will delete that account and all of its sub-accounts.*

Press the Delete operation-button, [X], for the account you want to delete. Once an account has been successfully deleted, the Account List page will re-display and a confirmation message will be displayed at the top of the page.

Account List

Successfully deleted account DOC30199005:

Any sub-accounts have also been deleted. The data for the affected account(s) will soon be moved into the purge area and then permanently destroyed.

Scroll down to the Account List. The Account List has been refreshed and the deleted account and is shown with a dark gray background and the Reactivate operation-button, [R], appears in the first column.

Number of rows matching filter: 5

	ID	PID <	CID	Brand	Account No	User Name	Role	SPlan
[X]	356	0 [S]	342	doc	DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]
[X]	359	356 [S]	342	doc	|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select
[X]	368	356 [S]	342	doc	|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select
[R]	369	356 [S]	342	doc	|-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select
[X]	360	0 [S]	342	doc	DOC30199003 [I]	ETV-RepairShop [S]	[S]	Trial [S]

⚠️ *Once you have deleted an account, it will always remain part of your account list. After 7 days the stored data for this deleted account will be permanently purged from the servers. A deleted account record can always be reactivated, but after 7 days the old backup data will be gone and all of the data will need to be reuploaded.*

⚠️ *If the* **Hide deleted accounts** *box is checked in the Search Criteria section of this page, the account list will not display deleted accounts.*
☑ Hide deleted accounts

Reactivate an Account [R]

The Reactivate operation-button, [R], allows you to reactivate or undelete an account record that has been deleted.

Number of rows matching filter: 5

	ID	PID <	CID	Brand	Account No	User Name	Role	SPlan
[X]	356	0 [S]	342	doc	DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]
[X]	359	356 [S]	342	doc	|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select
[X]	368	356 [S]	342	doc	|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select
[R]	369	356 [S]	342	doc	|-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select
[X]	360	0 [S]	342	doc	DOC30199003 [I]	ETV-RepairShop [S]	[S]	Trial [S]

Press the Reactivate operation-button, [R], for the account you want to undelete. Once an account has been successfully reactivated/undeleted, the Account List page will repaint and a confirmation message will be displayed at the top of the page.

Account List

Successfully undeleted account DOC30199005:

If it has been more than a few days, please contact technical support and ask if the data for the account is still active and available (data for deleted accounts is soon moved to a purge area and then purged).

Scroll down to the Account List. The Account List has been refreshed and the reactivated account and is shown with an [X] in the first column.

Number of rows matching filter: 5

	ID	PID <	CID	Brand	Account No	User Name	Role	SPlan
[X]	356	0 [S]	342	doc	DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]
[X]	359	356 [S]	342	doc	|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select
[X]	368	356 [S]	342	doc	|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select
[X]	369	356 [S]	342	doc	|-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select
[X]	360	0 [S]	342	doc	DOC30199003 [I]	ETV-RepairShop [S]	[S]	Trial [S]

The information in the subsequent fields of the account list will remain a "snap-shot" of the account as it was when the account was deleted (e.x.: **Lst Bck [EST], Disk GB, All Disk GB, Quota GB, # X Logins, ...**) so this information may not be correct. Once the first new backup of a reactivated account has completed, all subsequent fields will be updated with current information. To force update of the information immediately, use the *Test Connection* button in the backup manager configured to use that account.

ID

The **ID** field displays the unique id of each account. Every account is assigned a unique numeric identifier by the system and cannot be changed.

The **PID** field displays the Parent Account ID for this account. All Parent Accounts have a PID of "0". If a non-zero number is displayed in the PID field, this account is a sub-account and the PID field displays the ID of the parent account for this sub-account.

Use the Set operation-button, [S], to change the parent account ID for an account.

Number of rows matching filter: 5

	ID	PID ≤	CID	Brand	Account No	User Name	Role	SPlan	
[X]	356	0 [S]	342	doc	DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]	
[X]	359	356 [S]	342	doc	|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select	
[X]	368	356 [S]	342	doc	|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select	
[X]	360	0 [S]	342	doc	DOC30199003 [I]	ETV-Shop [S]	[S]	Basic [S]	
[X]	369	360 [S]	342	doc	|-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Basic	

⚠️ *In the above image, both "ETV-Primary" and "ETV-Shop" are parent accounts. The accounts "ETV-FrontOffice" and "ETV-Truck01" are sub-accounts of "ETV-BackOffice" and "ETV-Truck02" is a sub-account of "ETV-Shop".*

Changing the Parent Account Number [S]

The Set operation-button, [S], allows you to change the parent account ID number for the selected account. In the following example, we have created a new account for the customer Eddie's TV Repair, but made ETV-Truck02 a sub-account of ETV-Shop (giving the new account a Basic type of service plan).

Number of rows matching filter: 5

	ID	PID ≤	CID	Brand	Account No	User Name	Role	SPlan	
[X]	356	0 [S]	342	doc	DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]	
[X]	359	356 [S]	342	doc	|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select	
[X]	368	356 [S]	342	doc	|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select	
[X]	360	0 [S]	342	doc	DOC30199003 [I]	ETV-Shop [S]	[S]	Basic [S]	
[X]	369	360 [S]	342	doc	|-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Basic	

We need to move ETV-Truck02 under the ETV-Primary parent account to give this new account a Select type of service plan. Pressing the Set operation-button [S] in the PID column for the account we want to move will let us re-assign the PID to the correct account. The system will move you to the bottom of the Account List page and pre-fill the fields in the Account Operations portion of the page. The **Account Number** will be pre-filled with the account information. The final field is pre-filled with the account number of the current parent record.

Account Operations

Account Number: DOC30199005   **Action:** Set Parent Account Number

DOC30199003   Go

Change the last field to the account number of the parent account this account should be moved under. In this example we have changed "DOC3019903" to "DOC3019901". Press the *Go* button.

Account Operations

Account Number: DOC30199005   **Action:** Set Parent Account Number

DOC30199001   Go

Once the change is complete, the Account List page will repaint and a confirmation message will be displayed at the top of the page.

Account List

Successfully set parent account for account DOC30199005:

The parent account for DOC30199005 has been set to DOC30199001

Scroll down to the Account List. ETV-Truck02 is now a sub-account of ETV-Primary. ETV-Truck02 has been changed from a Basic type of service plan to a Select type of service plan.

Number of rows matching filter: 5

	ID	PID <	CID	Brand	Account No	User Name	Role	SPlan
[X]	356	0 [S]	342	doc	DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]
[X]	359	356 [S]	342	doc	-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select
[X]	368	356 [S]	342	doc	-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select
[X]	369	356 [S]	342	doc	-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select
[X]	360	0 [S]	342	doc	DOC30199003 [I]	ETV-RepairShop [S]	[S]	Basic [S]

CID

The **CID** field displays the unique Customer ID for this account. Accounts with the same CID create a single billing entity.

Brand

The **Brand** field shows the identifier of the brand being used for this account.

Account No

The **Account No** field is used for billing. Every account number consists of the brand name + the zip code of the account + the number of accounts in that zip code. Any account number that is preceded by "|--" is flagged as a sub-account (these characters are not actually part of the account number). Note that the "|--" will only properly appear if the account list is sorted by the PID column. Otherwise sub-accounts may be displayed far apart from their parent accounts.

Use the Impersonate operation-button, [I], to impersonate a user.

Impersonating an Account [I]

The Impersonate operation-button, [I], allows you look at a customer's account as if you were that customer. This is useful to change their password, contact information, or notifications.

Number of rows matching filter: 5

	ID	PID <	CID	Brand	Account No	User Name	Role	SPlan
[X]	356	0 [S]	342	doc	DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]
[X]	359	356 [S]	342	doc	|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select
[X]	368	356 [S]	342	doc	|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select
[X]	369	356 [S]	342	doc	|-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select
[X]	360	0 [S]	342	doc	DOC30199003 [I]	ETV-RepairShop [S]	[S]	Basic [S]

Press the Impersonate operation-button, [I], in the **Account No.** field. The system takes you directly to the Contact Information page for the impersonated user. From here you can update any of the contact information or access any of the other menu pages.

Just above the main menu, your user name and the user name of the account you are impersonating will be displayed. You have the same privileges or restrictions as the user you are impersonating.

⚠️ *The easiest way to change a user's password is to impersonate them and use the **My Account > Change Password** page. Because you are a partner impersonating the user, you do not need to know the old password in order to set a new one.*

To stop impersonating an account and return to the Account List page, press the "**Stop Impersonating**" link located above the main menu, on the far right side of the page.

Any changes you have made while impersonating another user will remain intact after you stop the impersonation and return to your own account.

Description of Fields 7-9:

	User Name	Role	SPlan
001 [I]	ETV-Primary [S]	[S]	Select [S]
99002 [I]	ETV-FrontOffice [S]	[S]	Select
.99004 [I]	ETV-Truck01 [S]	[S]	Select
99005 [I]	ETV-Truck02 [S]	[S]	Select
J03 [I]	ETV-RepairShop [S]	[S]	Trial [S]
01 [I]	Jamesons [S]	[S]	Basic [S]
J1 [I]	kowaltski4 [S]	[S]	Basic [S]
01 [I]	mohalo1 [S]	[S]	Select [S]
J1 [I]	FredSmith.PRI [S]	Partner Senior Manager [S]	Gold Partner [S
41002 [I]	AnnKlein.PRI [S]	Partner Customer Service [S]	Gold Partner

User Name

The **User Name** field was defined when this account was created. The user name must be universally unique across all accounts (even accounts you do not own). The user name is also the name that your customer will use when logging in to both the client software and the Web Portal for this account.

Use the Set operation-button, [S], to change the user name for an account.

Changing the User Name [S]

The Set operation-button, [S], allows you to change the user name for an account. In the following example, we need to change the user name from "ETV-Shop" to "ETV-RepairShop".

Number of rows matching filter: 5

	ID	PID <	CID	Brand	Account No	User Name	Role	SPlan
[X]	356	0 [S]	342	doc	DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]
[X]	359	356 [S]	342	doc	|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select
[X]	368	356 [S]	342	doc	|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select
[X]	369	356 [S]	342	doc	|-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select
[X]	360	0 [S]	342	doc	DOC30199003 [I]	ETV-Shop [S]	[S]	Basic [S]

Press the Set operation-button, [S], and a pop-up box will appear with the old user name displayed.

Explorer User Prompt

Script Prompt:

Enter the new user name below. You will need to update the settings on the My Account page after changing this.

ETV-Shop

OK   Cancel

Type the new user name over the old user name and press the *OK* button.

Explorer User Prompt

Script Prompt:

Enter the new user name below. You will need to update the settings on the My Account page after changing this.

ETV-RepairShop

OK   Cancel

Once the change is complete, the Account List page will repaint and a confirmation message will be displayed at the top of the page.

Account List

Successfully set user name for account DOC30199003:

User name changed to: ETV-RepairShop
IMPORTANT: Be sure to change the user name on the My Account page. When the software asks if it is the same account or a different account, please indicate that it is the same account.

Scroll down to the Account List. The display has been refreshed and the account list displays the new user name for the ETV-RepairShop account.

Number of rows matching filter: 5

	ID	PID <	CID	Brand	Account No	User Name	Role	SPlan	
[X]	356	0 [S]	342	doc	DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]	
[X]	359	356 [S]	342	doc	|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select	
[X]	368	356 [S]	342	doc	|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select	
[X]	369	356 [S]	342	doc	|-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select	
[X]	360	0 [S]	342	doc	DOC30199003 [I]	ETV-RepairShop [S]	[S]	Basic [S]	

⚠️ *Once this change is complete, you will need to make sure that the user name is also changed on the My Account page in the backup manager software for the computer configured to use that account. If the user name is not changed in the software, then the backups will begin to fail with an "Invalid Credentials" error message. When you change the user name in the software and click the "Save" button the software will ask if this is the same account or a new account. You should indicate that it is the same account.*

Role

The **Role** field shows the name of the security role that has been assigned to this account. Most of these settings are only used if you are a partner.

Use the Set operation-button, [S], to change the security role for an account.

Customer	Partner	Security Role	Description
🏳	🏳	(Default) or blank	Can only modify attributes of their own account, or if this is a parent account, sub-accounts can also be modified.
🏳	🏳	User	Same as (Default) or blank.
🏳	🏳	Power User	Has the same rights as a User, plus can see the backup session log for their account using the View operation-button, [V], in the **Lst Bck** field.
	🏳	Partner Read-Only	Allows a partner to look at any account information, but not to make any changes.
	🏳	Partner Customer Service	Allows a partner's customer service rep to manage existing accounts for their brand (can't create or delete accounts).
	🏳	Partner Senior Customer Service	Allows a partner's customer service rep to create, manage and delete accounts for their brand.
	🏳	Partner Senior Manager	Allows a partner to perform any function or make any change to the accounts for their brand.
	🏳	Partner API	This is a special role for those partners who have the ability to communicate with the web services API.

Changing the Security Role [S]

The Set operation-button, [S], allows you to change the **Role** associated with a particular user. In the following example, the user MacJones.PRI has the role of "Partner Senior Manager", but this user should have the role of "Partner Customer Service".

atching filter: 3

D	Brand	Account No	User Name	Role	SPlan
36	doc	DOC30341001 [I]	FredSmith.PRI [S]	Partner Senior Manager [S]	Gold Partner [S]
5	doc	|-- DOC30341002 [I]	AnnKlein.PRI [S]	Partner Customer Service [S]	Gold Partner
36	doc	|-- DOC30341003 [I]	MacJones.PRI [S]	Partner Senior Manager [S]	Gold Partner

Press the Set operation-button, [S], in the **Role** field and you will be taken to the Account Operations portion of the Account List page. The fields will be pre-filled with the appropriate account number, action and the current security role.

Account Operations

Account Number: DOC30341003   Action: Set Security Role

Partner Senior Manager: Allows a Partner to manage all accounts for their brand

Use the drop-down box to change the security role to the new setting and press the *Go* button.

Account Operations

Account Number: DOC30341003   Action: Set Security Role

Partner Customer Service : Allows a Partner's customer service rep to manage existing

Once the change is complete, the Account List page will repaint and a confirmation message will be displayed at the top of the page.

Account List

Successfully set security role for account DOC30341003:

Role set to Partner Customer Service (ID=5)

Scroll down to the Account List. The display has been refreshed and the account list displays the new role for the MacJones.PRI account.

atching filter: 3

D	Brand	Account No	User Name	Role	SPlan
36	doc	DOC30341001 [I]	FredSmith.PRI [S]	Partner Senior Manager [S]	Gold Partner [S]
5	doc	|-- DOC30341002 [I]	AnnKlein.PRI [S]	Partner Customer Service [S]	Gold Partner
36	doc	|-- DOC30341003 [I]	MacJones.PRI [S]	Partner Customer Service [S]	Gold Partner

SPlan

The **SPlan** field shows the name of the Service Plan that has been assigned to this account.

Use the Set operation-button, [S], to change the service plan for an account.

Customer	Partner	Service Plan	Description
☞		Trial	Same features of a Select service plan, but the account functions for only a limited period of time.
☞	☞	Basic	A single backup version where each new version of the backup replaces the last stored version.
☞	☞	Select	Multiple versions of the backup are stored as well as allowing for backups of Exchange and SQL-like databases.
	☞	Gold Partner	Has unique brand and sells the service to their own group of clients.
	☞	Platinum Partner	Same privileges as a Gold Partner, but also able to setup sub-brands and affiliate partners.
	☞	Partner	This is an affiliate partner of some Platinum Partner. Has a unique brand and sells the service to their customers.

Changing the Service Plan [S]

The Set operation-button, [S], allows you to change the **SPlan** setting associated with a particular user. In the following example, the user ETV-RepairShop has a service plan of "Trial". The trial period is over and we need to upgrade this user to a "Basic" service plan.

t No	User Name	Role	SPlan	IS	Expires [EST]	Created [EST]	D
9001 [I]	ETV-Primary [S]	[S]	Select [S]	o [D]	Never	2009-02-03	No
30199002 [I]	ETV-FrontOffice [S]	[S]	Select	[D]	Never	2009-02-03	No
30199004 [I]	ETV-Truck01 [S]	[S]	Select	o [D]	Never	2009-02-13	No
30199005 [I]	ETV-Truck02 [S]	[S]	Select	[D]	Never	2009-02-13	No
99003 [I]	ETV-RepairShop [S]	[S]	Trial [S]	[D]	2009-03-02 07 pm [S]	2009-02-03	No

⚠️ *The Set operation-button will only be displayed on parent accounts. To change the service plan of a sub-account, you will need to either move that account under a parent account that has the desired service plan or turn this sub-account into a parent account, at which point you can then change the service plan. These changes can be made by changing the accounts PID.*

Press the Set operation-button, [S], in the **SPlan** field and you will be taken to the Account

Operations portion of the Account List page. The fields will be pre-filled with the appropriate account number, action, the current service plan and the current expiration date.

Account Operations

Account Number: DOC30199003   Action: Set Service Plan

Trial: Trial accounts #GB=1 QuotaMB=512 Cmp=0

☐ Allow user to view compressed disk usage.

Expiration Date: 2009-03-03 00:00:00   Go

Use the drop-down box to change the service plan from a "Trial" service plan to a "Basic" service plan. Delete the Expiration Date, as billable accounts do not expire. Press the *Go* button.

⚠️   *Turning on* **Allow user to view compressed disk usage** *will allow your customers to see the compressed disk usage. This feature is not normally utilized, but is available for special requirements.*

Account Operations

Account Number: DOC30199003   Action: Set Service Plan

Basic: Basic #GB=0 QuotaMB=-1 Cmp=0

☐ Allow user to view compressed disk usage.

Expiration Date: Go

Once the change is complete, the Account List page will repaint and a confirmation message will be displayed at the top of the page.

Account List

Successfully set service plan for account DOC30199003:

Service Plan for account and all sub-accounts set to Select (ID=1)
The user will see uncompressed disk usage amounts.
The expiration date is currently (Never).

Scroll down to the Account List. The display has been refreshed and the account list displays the new service plan for the ETV-RepairShop account.

t No	User Name	Role	SPlan	S	Expires [EST]	Created [EST]	DEL
9001 [I]	ETV-Primary [S]	[S]	Select [S]	'D]	Never	2009-02-03	No
30199002 [I]	ETV-FrontOffice [S]	[S]	Select	.o [D]	Never	2009-02-03	No
30199004 [I]	ETV-Truck01 [S]	[S]	Select	[D]	Never	2009-02-13	No
30199005 [I]	ETV-Truck02 [S]	[S]	Select	[D]	Never	2009-02-13	No
99003 [I]	ETV-RepairShop [S]	[S]	Basic [S]	'D]	Never	2009-02-03	No

Description of Fields 10-14:

n	Lst Bck [EST]	Disk GB	All Disk GB	Quota GB	Mailboxes
	✔ 2009-02-23 01 am [V]	1.00	1.00	inf / inf [S]	3 provisioned; 0 billable [S]
	✔ 2009-02-23 04 am [V]	33.79	33.79	inf / inf [S]	[S]
[S]	✔ 2009-02-22 08 pm [V]	24.77	47.50	inf / inf [S]	[S]
	Never	0.00	0.00	inf / inf [S]	[S]
[S]	✔ 2009-02-23 01 am [V]	49.52	49.52	inf / inf [S]	[S]
t [S]	✖ 2009-02-20 08 pm [V]	181.44	238.64	inf / inf [S]	[S]
	✔ 2009-02-21 03 pm [V]	57.19	57.19	inf / inf [S]	[S]
t [S]	✔ 2009-02-20 11 pm [V]	3.37	3.37	inf / inf [S]	[S]
[S]	✔ 2009-02-20 10 pm [V]	4.41	4.41	inf / inf [S]	[S]
[S]	✔ 2009-02-21 07 am [V]	88.62	88.62	inf / inf [S]	[S]

Lst Bck [EST]

The **Lst Bck [EST]** field shows the date and time of the last attempted backup (successful or failed) performed on this account. If the View operation-button, [V], is displayed in this field, pressing [V] will allow you to view the backup session log for this account.

The basic functionality of the Backup Session Log page is very similar to that of the account list.

⚠️ *The column heading displays the time zone designator that corresponds to the time zone setting for the user who is currently logged into the Web Portal. All date time fields displayed on the Dash Panel are displayed using the designated time zone.*

Disk GB

The **Disk GB** field shows the total disk space used by this account in GB format (1024MB = 1GB).

All Disk GB

The **All Disk GB** field shows the disk space use by this account plus all of its sub-account in GB format (1024MB = 1GB).

Quota GB

The **Quota GB** field is displayed in gigabytes and in the form of "(hard quota GB) / (user set quote GB)". The text "inf" is used to show the quota has been set to an infinite amount. The "hard quota GB" field is used to specify the maximum amount of storage allocated to this account. If left blank, this field defaults to infinite for non-trial account or 0.5 GB for trial accounts. The "user quota GB" field is typically left blank, so that the user can use this field to set their own limits.

In general, you should only set a hard quota on an account if the customer has purchased a pre-determined amount of storage from you. If you plan to bill your customer based on actual usages, it is better to encourage user's to set a Total Disk Usage notification, rather than set a user quota.

Use the Set operation-button, [S], to change the storage quota for an account.

Changing the Storage Quota [S]

The Set operation-button, [S], allows you to change the "hard quota MB" and the "user quota MB" values. In the following example, the customer has requested a 2GB limit on the computer used in their repair trucks. This is a user limit that they can change at any time.

User Name	Role	SPlan	Lst Bck [EST]	Disk GB	All Disk GB	Quota GB
ETV-Primary [S]	[S]	Select [S]	✔ 2009-02-23 01 am [V]	1.00	1.00	inf / inf [S]
ETV-FrontOffice [S]	[S]	Select	✔ 2009-02-23 04 am [V]	33.79	33.79	inf / inf [S]
ETV-Truck01 [S]	[S]	Select	✔ 2009-02-22 08 pm [V]	24.77	47.50	inf / 2.00 [S]
ETV-Truck02 [S]	[S]	Select	Never	0.00	0.00	inf / inf [S]
ETV-RepairShop [S]	[S]	Basic [S]	✔ 2009-02-23 0	49.52	49.52	inf / inf [S]

Press the Set operation-button, [S], in the **Quota GB** field. The pop-up box will allow you to enter the new quota values. In this example, we have set the hard quota to infinity and the user quota to 2048MB (or 2GB). By limiting the amount of storage on a single account, the user is limiting the size of the backup files allowed. This is one way a customer might want to control their costs. Press the *OK* button.

Explorer User Prompt

Script Prompt:

Enter the new quota (-1 is infinite) in MB: (hard quota MB) / (user set quota MB)

-1 / 2048

OK

Cancel

⚠ *Multiply the desired number of GB by 1024 to get the number of MB. Alternatively, you can type the number followed by the unit, for example '2 GB'*

⚠️ *It is important to note that the **Hard Quota MB** field in a parent account is the total amount of storage that will be allowed for the parent account plus all of its sub-accounts.*

Once the change is complete, the Account List page will repaint and a confirmation message will be displayed at the top of the page.

Account List

Successfully set quota for account DOC30199005:

New quota: -1 / 2048

Scroll down to the Account List. The display has been refreshed and the account list displays the new quota for the ETV-Truck02 account.

User Name	Role	SPlan	Lst Bck [EST]	Disk GB	All Disk GB	Quota GB
ETV-Primary [S]	[S]	Select [S]	✔ 2009-02-23 01 am [V]	1.00	1.00	inf / inf [S]
ETV-FrontOffice [S]	[S]	Select	✔ 2009-02-23 04 am [V]	33.79	33.79	inf / inf [S]
ETV-Truck01 [S]	[S]	Select	✔ 2009-02-22 08 pm [V]	24.77	47.50	inf / 2.00 [S]
ETV-Truck02 [S]	[S]	Select	Never	0.00	0.00	inf / 2.00 [S]
ETV-RepairShop [S]	[S]	Basic [S]	✔ 2009-02-23 0	49.52	49.52	inf / inf [S]

⚠️ *If the storage limit is reached during a backup, the backup process will stop and issue errors in the backup log, and then alert you as configured on the Notifications tab of the Options page in the backup manager software.*

⚠️ *The actual quota is the minimum of the two quotas (**Hard Quote MB** and **User Quota MB**) and of the amount of disk usage remaining under the parent account.*

Mailboxes

The email archiving is a separate product from the backup product and must be licensed separately. This field is not operational until licensed and enabled by the Customer Support Staff.

The **Mailboxes** field shows the number of mailboxes you want to provision for email archiving and the number of mailboxes actually in use (which are billable at the end of each month). Zero or <blank> means that this feature is turned off for this account. If only a single number is shown, the number of provisioned mailboxes is the same as the number of billable mailboxes.

The number of provisioned mailboxes is the number of mailboxes the partner wants to allow a single computer with the archiving software installed on to be able to archive from. If you plan to archive from an Exchange journaling mailbox, then you must provision at least as many

mailboxes as are in the Exchange store that contains the journaling mailbox (excepting aliases).

The billable mailboxes value will be the highest number of provisioned mailboxes actually used in the last 14 days. So if a customer decreases the number of provisioned mailboxes to less than what they are currently using, it will be about 14 days before the number of billable mailboxes decreases to the newly provisioned number.

⚠️ *A partner is billed based on the billable mailboxes count, not the provisioned mailboxes count.*

⚠️ *Trial accounts that are provisioned for email archiving will only allow email archiving to be used for 45 days from when the account was first provisioned for email archiving. Even if the trial has not expired, archiving will not work beyond 45 days.*

Use the Set operation-button, [S], to change only the provisioned mailboxes quota for an account. The billable mailboxes count is computed automatically when the email archiving software connects to the account.

🔧 Changing the Mailbox Quota [S]

The Set operation-button, [S], allows you to change the **Mailboxes** setting associated with a particular account. In the following example, the customer would like to provision for 3 mailboxes on their primary computer, "ETV-Primary".

User Name	Role	SPlan	Lst Bck [E'	B	Quota GB	Mailboxes
ETV-Primary [S]	[S]	Select [S]	✔ 2009-02-		inf / inf [S]	[S]
ETV-FrontOffice [S]	[S]	Select	✔ 2009-02-2		inf / inf [S]	[S]
ETV-Truck01 [S]	[S]	Select	✔ 2009-02		inf / 2.00 [S]	[S]
ETV-Truck02 [S]	[S]	Select	Never		inf / 2.00 [S]	[S]
ETV-RepairShop [S]	[S]	Basic [S]	✔ 2009-02-		inf / inf [S]	[S]

Press the Set operation-button, [S], in the **Mailboxes** field and a pop-up box will allow you to enter the new mailbox quota for this account. In this example, we have set the mailbox provision to 3. This will allow the system to archive up to 3 separate mailboxes from Microsoft Exchange. Press the *OK* button.

Explorer User Prompt

Script Prompt:

Enter the number of mailboxes you want to provision for email archiving services.

`3`

OK   Cancel

Once the change is complete, the Account List page will repaint and a confirmation message will be displayed at the top of the page.

Account List

Successfully set number of email archiving mailboxes for account DOC30199001:

The number of provisioned mailboxes was set to: 3 mailboxes

Scroll down to the Account List. The display has been refreshed and the account list now displays the new mailbox quota for the ETV-Primary account.

User Name	Role	SPlan	Lst Bck [E'	B	Quota GB	Mailboxes
ETV-Primary [S]	[S]	Select [S]	✔ 2009-02-		inf / inf [S]	3 provisioned; 0 billable [S]
ETV-FrontOffice [S]	[S]	Select	✔ 2009-02-2		inf / inf [S]	[S]
ETV-Truck01 [S]	[S]	Select	✔ 2009-02		inf / 2.00 [S] [S]	E
ETV-Truck02 [S]	[S]	Select	Never		inf / 2.00 [S] [S]	
ETV-RepairShop [S]	[S]	Basic [S]	✔ 2009-02-		inf / inf [S]	[S]

Description of Fields 15-19:

	Company	Name	City	ST	Zip Code	Pas
illable [S]	Eddie's TV Repair	Jones, Eddie [E]	Marietta	GA	US-30199	[Re
	Eddie's TV Repair	Jones, Eddie [E]	Marietta	GA	US-30199	[Re
	Eddie's TV Repair	Jones, Eddie [E]	Marietta	GA	US-30199	Te
	Eddie's TV Repair	Jones, Eddie [E]	Marietta	GA	US-30199	T
	Eddie's TV Repair	Jones, Eddie [E]	Marietta	GA	US-30199	T
	Jameson Financial Group	Jameson, Carter [E]	New York	NY	US-10001	[Re
	Joe's Plumbing	Kowaltski, Joe [E]	Philadelphia	PA	US-19106	[R
	Mohalo Sales	Suzuki, Jake [E]	Kauai	HI	US-96703	[Re
	Professional Resellers	Smith, Fred [E]	Atlanta	GA	US-30341	[Re
	Professional Resellers	Klein, Ann [E]	Atlanta	GA	US-30341	Te

Company

The **Company** field shows the name of your customer's company.

Name

The **Name** field shows last name and first name of the contact for each account.

Use the Email operation-button, [E], to quickly send an email to the contact or this account.

Emailing a Customer [E]

The Email operation-button, [E], allows you to quickly send an email to your customer. A tool tip will show you the email address associated with the contact name when you place you mouse over the Email operation-button [E].

Company	Name	City	ST	Zip Code	Passwd	# X
0 billable [S]	Eddie's TV Repair	Jones, Eddie [E]	Marietta	GA	US-30199	[Reset]	1 [U]
	Eddie's TV Repair	Jones, Eddie [E]	Eddie@ETVRepair.net			[Reset]	0 [M]
	Eddie's TV Repair	Jones, Eddie [E]	Marietta	GA	US-30199	Temp [Reset]	2 [U]
	Eddie's TV Repair	Jones, Eddie [E]	Marietta	GA	US-30199	Temp [Reset]	2 [U]
	Eddie's TV Repair	Jones, Eddie [E]	Marietta	GA	US-30199	Temp [Reset]	0 [M]

Press the Email operation-button [E] and your default mail program will open a new message with the recipient set to the customer's contact email address.
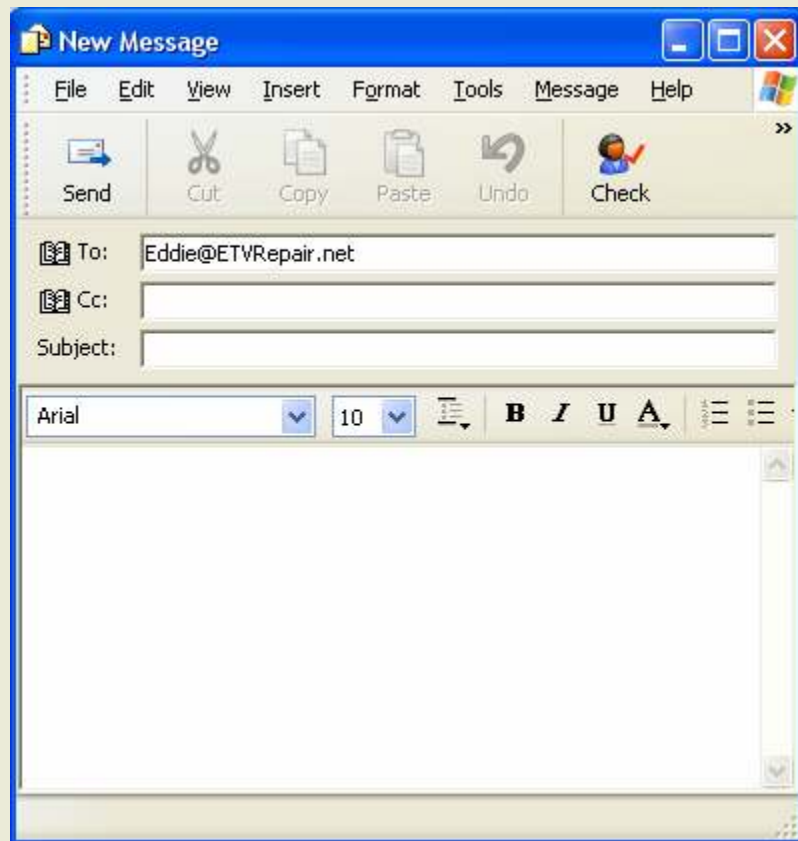
City

The **City** field shows the city from the contact information for this account.

ST

The **ST** field shows the state from the contact information for this account.

Zip

The **Zip** field shows a two character country designation and the five digit zip code from the contact information for this account.

Description of Fields 20-25:

e Passwd	# X Logins	DIS	Expires [EST]	Created [EST]	DEL	NoD
99 [Reset]	1 [U] [M]	No [D]	Never	2009-02-03	No	200
[Reset]	0 [M]	No [D]	Never	2009-02-03	No	
99 Temp [Reset]	2 [U] [M]	No [D]	Never	2009-02-13	No	
9 Temp [Reset]	2 [U] [M]	No [D]	Never	2009-02-13	2009-02-26	
J Temp [Reset]	0 [M]	No [D]	2009-04-02 08 pm [S]	2009-02-03	No	
[Reset]	0 [M]	No [D]	Never	2009-02-07	No	
J6 [Reset]	1 [U] [M]	No [D]	Never	2009-02-09	No	
[Reset]	0 [M]	No [D]	Never	2009-02-09	No	200
1 [Reset]	0 [M]	No [D]	Never	2008-12-10	No	
r1 Temp [Reset]	0 [M]	No [D]	Never	2008-12-10	No	

Passwd

The **Passwd** field shows the status of the password and gives you access to the reSet operation-button, [Reset].

> ### Resetting an Account Password [Reset]
>
> The Reset operation-button, [Reset], allows you to reset a customer's password to a temporary system generated password. This new password is emailed to the customer using the email address in the contact information. The customer will be forced to change the password the first time they successfully login using this temporary password. In the following example, we will reset the password for the ETV-Truck02 account.
>
> | Account No | User Name | Role | SPlan | Code | Passwd | # X Logins |
> |---|---|---|---|---|---|---|
> | DOC30199001 [I] | ETV-Primary [S] | [S] | Select [S] | ,199 | [Reset] | 0 [M] |
> | \|-- DOC30199002 [I] | ETV-FrontOffice [S] | [S] | Select | 30199 | [Reset] | 0 [M] |
> | \|-- DOC30199004 [I] | ETV-Truck01 [S] | [S] | Select | 199 | Temp [Reset] | 0 [M] |
> | \|-- DOC30199005 [I] | ETV-Truck02 [S] | [S] | Select | ,199 | [Reset] | 2 [U] [M] |
> | DOC30199003 [I] | ETV-RepairShop [S] | [S] | Trial [S] | '0199 | Temp [Reset] | 0 [M] |

Press the Reset operation-button, [Reset]. Once the change is complete, the Account List page will repaint and a confirmation message will be displayed at the top of the page.

Account List

Successfully reset password for account DOC30199005:

New password is spomastige4g
The user has been notified via email (Eddie@ETVemail.net).

Scroll down to the Account List. The display has been refreshed and the password status is now "**Temp**" for the ETV-Truck02 account. The counter for **# X Logins** will also be reset to "0".

Account No	User Name	Role	SPlan	Code	Passwd	# X Logins
DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]	)199	[Reset]	0 [M]
-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select	30199	[Reset]	0 [M]
-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select	199	Temp [Reset]	0 [M]
-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select	199	Temp [Reset]	0 [M]
DOC30199003 [I]	ETV-RepairShop [S]	[S]	Trial [S]	30199	Temp [Reset]	0 [M]

⚠ *You will not be able to reset the password for any account that is in Maintenance Mode (**# X Logins** is set to "*In Maint.*"). Do not take an account out of Maintenance Mode yourself, please contact technical support instead.*

X Logins

The **# X Logins** field shows the number of consecutive failed logins. A user only gets 15 failed attempts within any 24 hour period and then the account is locked and can only be unlocked by a partner using the Web Portal. Alternatively, accounts are unlocked automatically after 24 hours.

This field contains embedded operation-buttons. Press [U] it to unlock the account and reset the number of failed log-in attempts to 0. If [M] is displayed, you can press the Maintenance operation-button to put the account in Maintenance Mode.   Maintenance mode is most often used to prevent automatic backups until the initial backup is completed manually. Pressing the Unlock operation-button, [U], also takes an account out of maintenance mode.

⚠ *Do not take an account out of maintenance mode unless you accidentally put the account into maintenance mode with your previous action. Accounts can be put into maintenance mode when their primary storage location is being migrated between data centers or for other reasons. Please contact technical support for assistance if an account is unexpectedly in maintenance mode.*

⚒ Unlocking an Account [U]

The Unlock operation-button, [U], is displayed anytime there is at least one failed log-in attempt on an account. This button allows you re-set this counter to zero and unlock an account after a user has failed to log-in successfully. In the following example the **# X Logins** field for ETV-FrontOffice shows that user has three failed log-in attempts. Pressing the Unlock operation-button, [U] will reset the counter to zero.

⚠ *The Unlock operation-button will also takes an account out of maintenance mode. Do not take an account out of maintenance mode unless you were the one who put it in to maintenance mode and only if you do not have an active USB preload for that account.*

Account No	User Name	Role	SPlan	L		# X Logins	DIS	F
DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]			1 [U] [M]	No [D]	
-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select			3 [U] [M]	No [D]	Ne
-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select		Reset]	0 [M]	No [D]	Ne
-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select	N		0 [M]	No [D]	N
DOC30199003 [I]	ETV-RepairShop [S]	[S]	Trial [S]		[Reset]	0 [M]	No [D]	

Once the change is complete, the Account List page will repaint and a confirmation message will be displayed at the top of the page.

Account List

Successfully unlocked account DOC30199002

Scroll down to the Account List. The display has been refreshed and the number of failed log-in attempts under **# X Logins** has been set to zero and the Unlock operation-button, [U], is not shown for the ETV-FrontOffice account.

Account No	User Name	Role	SPlan	L		# X Logins	DIS	F
DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]	d		1 [U] [M]	No [D]	
-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select			0 [M]	No [D]	N
-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select		eset]	0 [M]	No [D]	
-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select	N		0 [M]	No [D]	N
DOC30199003 [I]	ETV-RepairShop [S]	[S]	Trial [S]		Reset]	0 [M]	No [D]	

⚒ Putting an Account into Maintenance Mode [M]

The Maintenance operation-button, [M], allows you put an account into Maintenance Mode. This action will halt all backup processes for this account. This feature is primarily used when a new account is activated and the initial backup is being preloaded to a USB disk. The partner would put their customer's account in maintenance mode, perform the preload backup operation, send the USB disk to our data center, and then our engineering team will take the account out of maintenance mode once the USB preload has been fully processed. In the following example, we will put the ETV-Primary account into maintenance mode.

Account No	User Name	Role	SPlan	L	# X Logins	DIS	F
DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]	d	1 [U] [M]	No [D]	
|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select		0 [M]	No [D]	N
|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select	.eset]	0 [M]	No [D]	
|-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select	N	0 [M]	No [D]	N.
DOC30199003 [I]	ETV-RepairShop [S]	[S]	Trial [S]	.Reset]	0 [M]	No [D]	

Press the Maintenance operation-button, [M]. Once the change is complete, the Account List page will repaint and a confirmation message will be displayed at the top of the page.

Account List

Successfully set maintenance flag for account DOC30199001

Scroll down to the Account List. The display has been refreshed and the account list now shows "In Maint." and the Unlock operation-button, [U], for the ETV-Primary account.

Account No	User Name	Role	SPlan	L	# X Logins	DIS	E
DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]		In Maint. [U]	No [D]	N
|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select		0 [M]	No [D]	N
|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select	:set]	0 [M]	No [D]	N
|-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select	N	0 [M]	No [D]	Ne
DOC30199003 [I]	ETV-RepairShop [S]	[S]	Trial [S]	:t]	0 [M]	No [D]	;

⚠ *Pressing the Unlock operation-button [U] will take an account out of maintenance mode.*

DIS

The **DIS** field shows if this account is disabled ("Yes" or "No"). If the account has been disabled, an optional comment is also displayed (60 character max). This field contains embedded operations. If [D] is displayed, you can press it to disable the account. If [EN] is displayed, you can press it to enable the account (removing the disabled status). You could use these commands if you were having a dispute with one of your customers and you wanted to suspend

their backups until the dispute was resolved. Note that you will continue to be billed for the storage a "Disabled" account is using.

Disabling an Account [D]

The Disable operation-button, [D], allows you disable or suspend the backups of an active customer. The disabled customer will NOT have access to their previous backup data while the account is disabled. In the following example, we will disable the ETV-Primary account due to a lack of payment.

User Name	Role	SPlan	X Logins	DIS	Expires [EST]	Cr
ETV-Primary [S]	[S]	Select [S]	[M]	No [D]	Never	2
ETV-FrontOffice [S]	[S]	Select	[M]	No [D]	Never	20
ETV-Truck01 [S]	[S]	Select	[M]	No [D]	Never	20
ETV-Truck02 [S]	[S]	Select	[M]	No [D]	Never	200
ETV-RepairShop [S]	[S]	Basic [S]	[M]	No [D]	Never	20

 The disable feature impacts individual accounts. Disabling a parent account will not disable the sub-accounts. Each account would have to be disabled separately.

Press the Disable operation-button, [D], in the **DIS** field and a pop-up box will allow you to enter a new comment for this account (up to 60 characters long). This description will not be visible to the customer. Press the *OK* button.

Once the change is complete, the Account List page will repaint and a confirmation message will be displayed at the top of the page.

Scroll down to the Account List. The display has been refreshed and the ETV-Primary account now displays the disabled account and comment. The Enable operation-button, [EN], is now displayed in the **DIS** column for the ETV-Primary account.

User Name		Role	SPlan		X Logins	DIS		E
ETV-Primary [S]		[S]	Select [S]		[M]	Yes [EN] (Payment is 45 days overdue (Ann.).)		Ne
ETV-FrontOffice [S]	[S]	[S]	Select		J [M]	No [D]		Ne
ETV-Truck01 [S]		[S]	Select		[M]	No [D]		N
ETV-Truck02 [S]		[S]	Select		J [M]	No [D]		Ne
ETV-RepairShop [S]	[S]	[S]	Basic [S]		[M]	No [D]		Ne

Enabling an Account [EN]

The Enable operation-button, [EN], allows you enable or activate the backups of an active customer.

User Name		Role	SPlan		X Logins	DIS		E
ETV-Primary [S]		[S]	Select [S]		[M]	Yes [EN] (Payment is 45 days overdue (Ann.).)		Ne
ETV-FrontOffice [S]	[S]	[S]	Select		J [M]	No [D]		Ne
ETV-Truck01 [S]		[S]	Select		[M]	No [D]		N
ETV-Truck02 [S]		[S]	Select		J [M]	No [D]		Ne
ETV-RepairShop [S]	[S]	[S]	Basic [S]		[M]	No [D]		Ne

Press the Enable operation-button, [EN]. Once the change is complete, the Account List page will repaint and a confirmation message will be displayed at the top of the page.

Account List

Successfully enabled account DOC30199001

Scroll down to the Account List. The display has been refreshed and the account list now displays the disabled account and comment. The Disable operation-button [D] is now displayed in the **DIS** column for the ETV-Primary account.

User Name		Role	SPlan		X Logins	DIS		Expires [EST]	Cr
ETV-Primary [S]		[S]	Select [S]		[M]	No [D]		Never	2
ETV-FrontOffice [S]	[S]	[S]	Select		[M]	No [D]		Never	20
ETV-Truck01 [S]		[S]	Select		[M]	No [D]		Never	20
ETV-Truck02 [S]		[S]	Select		M]	No [D]		Never	200
ETV-RepairShop [S]	[S]	[S]	Basic [S]		[M]	No [D]		Never	2

Expires [EST]

The **Expires [EST]** field is the date that this account expires. This field can only used for accounts with a Trial type of service plan. The date is shown in the format with year first and then month and day, separated by dashes: YYYY-MM-DD.

Use the Set operation-button, [S], to change the expiration date for a trial account.

Changing the Date an Account Expires [S]

The Set operation-button, [S], allows you to change the **Expires [EST]** setting associated with a particular trial account. You can not extend the trial period beyond 60 days from the creation date of the account. In the following example, we will extend the expiration date of this trial account.

Account No	User Name	Role	SPlan	L	Expires [EST]	Created [EST]
DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]		Never	2009-02-03
-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select		Never	2009-02-03
-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select		Never	2009-02-13
-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select		Never	2009-02-13
DOC30199003 [I]	ETV-RepairShop [S]	[S]	Trial [S]		2009-03-03 08 pm [S]	2009-02-03

Press the Set operation-button, [S], in the **Expires [EST]** field and a pop-up box will allow you to enter a new expiration for this account. Enter the new date using the format of YYYY-MM-DD and press the *OK* button.

Explorer User Prompt

Script Prompt:

Enter the new expiration date (use format of YYYY-MM-DD):

2009-04-03

OK

Cancel

Once the change is complete, the Account List page will repaint and a confirmation message will be displayed at the top of the page.

Account List

Successfully set expiration date for account DOC30199003:

New expiration date: 2009-04-03 00:00:00

Scroll down to the Account List. The display has been refreshed and the account list now displays the new account expiration date for the ETV-Repair Shop account.

Account No	User Name	Role	SPlan	L'	Expires [EST]	Created [EST]
DOC30199001 [I]	ETV-Primary [S]	[S]	Select [S]		Never	2009-02-03
|-- DOC30199002 [I]	ETV-FrontOffice [S]	[S]	Select		Never	2009-02-03
|-- DOC30199004 [I]	ETV-Truck01 [S]	[S]	Select		Never	2009-02-13
|-- DOC30199005 [I]	ETV-Truck02 [S]	[S]	Select	N	Never	2009-02-13
DOC30199003 [I]	ETV-RepairShop [S]	[S]	Trial [S]		2009-04-03 08 pm [S]	2009-02-03

Created [EST]

The **Created [EST]** field shows the date that this account was created. The date is shown with the format of YYYY-MM-DD. This is an informational field and cannot be changed.

DEL

The **DEL** field shows the date that an account was deleted.

Zip Code	Passwd	# X Logins	DIS	Expires [EST]	Created [EST]	DEL	N
US-30199	[Reset]	0 [M]	No [D]	Never	2009-02-03	No	
JS-30199	[Reset]	0 [M]	No [D]	Never	2009-02-03	No	
JS-30199	Temp [Reset]	0 [M]	No [D]	Never	2009-02-13	No	
US-30199	Temp [Reset]	2 [U] [M]	No [D]	Never	2009-02-13	No	
US-30199	Temp [Reset]	0 [M]	No [D]	2009-04-03 08 pm [S]	2009-02-03	2009-02-24	

⚠️ *If the **Hide deleted accounts** box is checked in the Search Criteria section of this page, the account list will not display deleted accounts.*

☑ Hide deleted accounts

Description of Fields 26-28:

NoBk Sent [EST]	NoBk Days	Server ID	In
2009-02-13	3 / 7	20011008: r1.slc.efoldering.com	Quic
	3 / 7	10071004: eFolderR7.efoldering.com	Us
	3 / 7	10071003: eFolderR7.efoldering.com	Ba
-26	3 / 7	10071004: eFolderR7.efoldering.com	[S
	3 / 7	20011015: r1.slc.efoldering.com	Wa
	3 / 7	20011010: r1.slc.efoldering.com	[S.
	3 / 7	10071012: eFolderR7.efoldering.com	[S]
2009-02-09	3 / 7	20010002: r1.slc.efoldering.com	Ex
	3 / 7	20010011: r1.slc.efoldering.com	[S]
	3 / 7	10071012: eFolderR7.efoldering.com	Cus

NoBk Sent [EST]

The **NoBk Sent [EST]** field shows the date that the last no backup alert was sent. The date is shown in the format of YYYY-MM-DD. This is an informational field and cannot be changed.

NoBk Days

The **NoBk Days** field shows the number of days before a no backup alert should be sent the first time and the number of days thereafter. The values displayed in this field are from the **No Backup Notification** settings on the **My Account > Notifications** page.

Server

The **Server** field shows the internal name of the server where the backup is stored. This is an informational field and cannot be modified.

Description of Fields 29-30:

	Internal Desc.	User Desc.
	Quickbooks Server [S]	Back Office Computer [S]
.om	Used for daily business transactions [S]	Front Office Computer [S]
).com	Backup when powered on. [S]	Eddie's White Truck [S]
:om	[S]	Tom's Blue Truck [S]
	Wants only Basic service - initally. [S]	Computer in rear shop. [S]
	[S]	[S]
.om	[S]	[S]
	Exchange Server [S]	[S]
	[S]	[S]
.com	Customer Support [S]	[S]

Internal Desc.

The **Internal Desc.** field displays a description of the account that is recorded by the partner and cannot be seen by the customer.

Use the Set operation-button, [S], to change the internal description for an account.

> **Changing the Internal Description [S]**
>
> The Set operation-button, [S], allows you to change the **Internal Desc.** setting associated with a particular account. In the following example, we will add an internal description to the ETV-Truck01 account.

User Name	Role	SPla	ID	Internal Desc.	User Desc.
ETV-Primary [S]	[S]	Sele		For critical business files [S]	Back Office Computer [S]
ETV-FrontOffice [S]	[S]	Sele		Used for daily business transactions [S]	Front Office Computer [S]
ETV-Truck01 [S]	[S]	Sele		[S]	[S]
ETV-Truck02 [S]	[S]	Sele		[S]	[S]
ETV-RepairShop [S]	[S]	Trial		Wants only Basic service - initally. [S]	Computer in rear shop. [S]

Press the Set operation-button, [S], in the **Internal Desc.** field and a pop-up box will allow you to enter a new comment for this account. This description will not be visible to the customer. Press the *OK* button.

Explorer User Prompt

Script Prompt:

Enter the new internal description (not visible to users):

Backup when powered on.

OK

Cancel

Once the change is complete, the Account List page will repaint and a confirmation message will be displayed at the top of the page.

Account List

Successfully set internal description for account DOC30199004:

New internal description: Backup when powered on.

Scroll down to the Account List. The display has been refreshed and the account list now displays the new internal description for the ETV-Truck02 account.

User Name	Role	SPla	ID	Internal Desc.	User Desc.
ETV-Primary [S]	[S]	Sele		For critical business files [S]	Back Office Computer [S]
ETV-FrontOffice [S]	[S]	Sele		Used for daily business transactions [S]	Front Office Computer [S]
ETV-Truck01 [S]	[S]	Sele		Backup when powered on. [S]	[S]
ETV-Truck02 [S]	[S]	Sele		[S]	[S]
ETV-RepairShop [S]	[S]	Trial		Wants only Basic service - initally. [S]	Computer in rear shop. [S]

User Desc.

The **User Desc.** field displays the description of an account that can be seen and modified by the user.

Use the Set operation-button, [S], to change the user description for an account.

Changing the User Description [S]

The Set operation-button, [S], allows you to change the **User Desc.** setting associated with a particular account. In the following example, we will add a user description to the ETV-Truck01 account.

User Name	Role	SPla	ID	Internal Desc.	User Desc.
ETV-Primary [S]	[S]	Selec		For critical business files [S]	Back Office Computer [S]
ETV-FrontOffice [S]	[S]	Sele		Used for daily business transactions [S]	Front Office Computer [S]
ETV-Truck01 [S]	[S]	Sele		Backup when powered on. [S]	[S]
ETV-Truck02 [S]	[S]	Sele		Backup when powered on. [S]	[S]
ETV-RepairShop [S]	[S]	Trial		Wants only Basic service - initally. [S]	Computer in rear shop. [S]

Press the Set operation-button, [S], in the **User Desc.** field and a pop-up box will allow you to enter a new comment for this account. This description will be visible to the customer. Press the *OK* button.

Explorer User Prompt

Script Prompt:

Enter the new description (visible to users):

Eddie's White Truck

OK   Cancel

Once the change is complete, the Account List page will repaint and a confirmation message will be displayed at the top of the page.

Account List

Successfully set description for account DOC30199004:

New description: Eddie's White Truck

Scroll down to the Account List. The display has been refreshed and the account list now displays the new user description for the ETV-Truck01 account.

User Name	Role	SPla	ID	Internal Desc.	User Desc.
ETV-Primary [S]	[S]	Selec		For critical business files [S]	Back Office Computer [S]
ETV-FrontOffice [S]	[S]	Sele		Used for daily business transactions [S]	Front Office Computer [S]
ETV-Truck01 [S]	[S]	Sele		Backup when powered on. [S]	Eddie's White Truck [S]
ETV-Truck02 [S]	[S]	Sele		Backup when powered on. [S]	[S]
ETV-RepairShop [S]	[S]	Trial		Wants only Basic service - initally. [S]	Computer in rear shop. [S]

Summary Information:

Just below the account list is the heading Summary Information. The section shows storage usage numbers based on all of the accounts that match the search criteria and are available in the account list.

Summary Information

This section contains a summary of the accounts that match your search filter above.

Total number of accounts: 27
Total uncompressed disk usage: 169.91 GB
Total compressed disk usage: 132.88 GB
Average uncompressed disk usage: 6.29 GB
Average compressed disk usage: 4.92 GB
Average compression ratio: 1.28

4-4 Exporting Data from the Account List

The third functional area of the Account List page is "Export Data" and this feature allows you to export data based on the resulting account list in CSV (designed for Excel), CSV (portable), or XML format.

To open the Account List page, choose **Accounts > Account List** off the main menu bar.
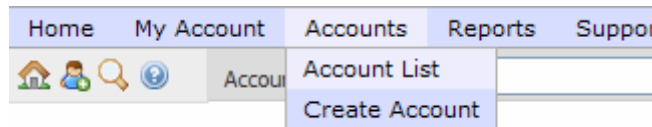
The functionality of the Exporting Data feature is covered in this document.

The other sections of the Account List page include:

- Search / Filter Criteria: see "Searching the Account List",

- Accounts Matching Search Criteria: see "Using the Account List", and

- Account Operations: see "Using the Account Operations feature".

⚠️ *The system has many predefined reports that you can use for exporting data. Before building your own search/export we strongly suggest that you examine the list of existing reports available to you under the* **Reports > Accounts** *menu item.*

⚠️ *The* **Billable Accounts** *report was specifically designed for exporting the data needed for billing your customers. The* **Billable Disk Usage** *report is also highly useful when billing your customers, and provides an Excel spreadsheet with end-of-month usages. Your partner invoice is actually generated from the same data that is used to generate the Billable Disk Usage report.*
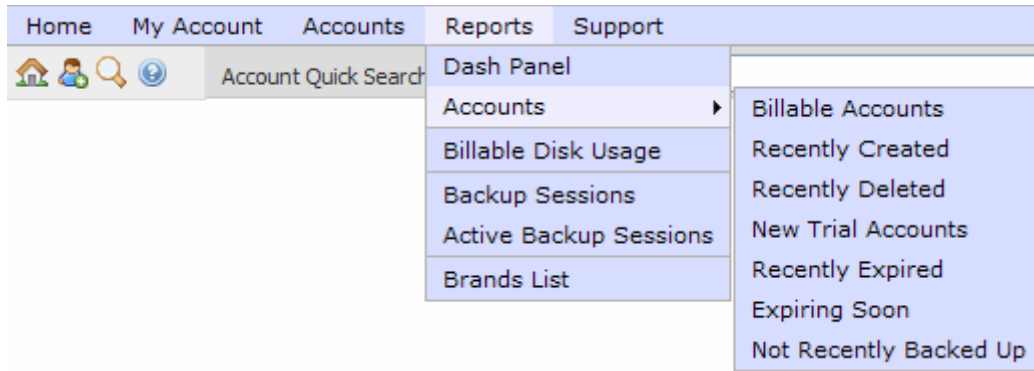
The Export Data feature:

Use the fields under the heading Export Data to define what type of accounts will be exported and the format of the exported file ("CSV for Excel", "CSV", "XML"). You can limit the type of records being exported to just parent accounts by checking the **Only export parent accounts** box. Only data for those records that match the search criteria and are available under the heading "Accounts Matching Search Criteria" on this page will be exported. Remember, this could be a subset of your total accounts. Note that if more accounts match the search criteria than are displayed in the current page, the export data feature will still capture all matching accounts.

The most commonly used export format is "CSV for Excel." Both options, "CSV for Excel" and "CSV," generate a Comma Separated Value file format. The "CSV for Excel" file contains added format information to make the transition into Microsoft Excel more user friendly and more consistent. The CSV file format is often used to exchange data between different applications. In very general terms the first record of the CSV file is a header record containing column (field) names, each record is one line of text, and fields are separated with commas. The resulting file will have the extension of ".CSV" and will be opened by Microsoft Excel.

	A	B	C	D	E	
1	BrandID	ServicePlan	ParentAccountNo	AccountNo	IsSubAccount	UserNa
2	doc	Basic	DOC07004001	DOC07004001	0	eLite
3	doc	Basic	DOC10001001	DOC10001001	0	James.
4	doc	Basic	DOC19106001	DOC19106001	0	kowaltsk
5	doc	Basic	DOC30312001	DOC30312001	0	YT1300
6	doc	Select	DOC30199001	DOC30199001	0	ETV-P
7	doc	Select	DOC30199001	DOC30199002	1	ETV-Fr
8	doc	Select	DOC30199001	DOC30199004	1	ETV-Tr
9	doc	Select	DOC30199001	DOC30199005	1	ETV-T
10	doc	Select	DOC80214001	DOC80214001	0	xtremef.
11	doc	Select	DOC96703001	DOC96703001	0	mohalo
12	doc	Select	DOCGB01023001	DOCGB01023001	0	prefect
13	doc	Trial	DOC16105001	DOC16105001	0	AntEm
14	doc	Trial	DOC30068001	DOC30068001	0	mrvant
15	doc	Trial	DOC30199003	DOC30199003	0	ETV-Re

The XML ("Extensible Markup Language"), file format uses a hierarchical, structured syntax that allows the description of virtually any kind of information. XML uses tags that are similar to the tags in HTML to define document components. The resulting file will have the extension of ".XML" and can be viewed Windows Explorer. XML data is best used as input into third-party applications that accept XML data.

```xml
<?xml version="1.0" encoding="utf-8" ?>
- <data>
  - <row>
      <BrandID>doc</BrandID>
      <ServicePlan>Basic</ServicePlan>
      <ParentAccountNo>DOC07004001</ParentAccountNo>
      <AccountNo>DOC07004001</AccountNo>
      <IsSubAccount>0</IsSubAccount>
      <UserName>eLite</UserName>
      <CanViewCompressed>0</CanViewCompressed>
      <UncompressedDiskGB>0</UncompressedDiskGB>
      <CompressedDiskGB>0</CompressedDiskGB>
      <UncompressedDiskGBNoSub>0</UncompressedDiskGBNoSub>
      <CompressedDiskGBNoSub>0</CompressedDiskGBNoSub>
```
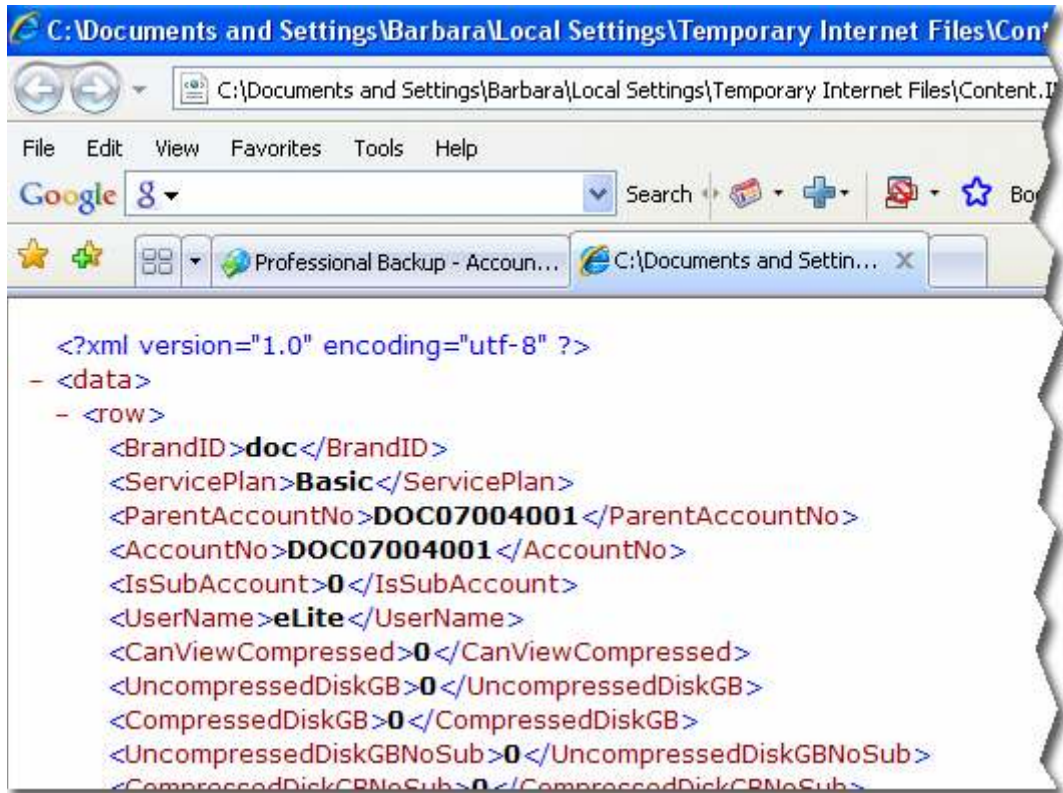
The following table outlines the key fields that are exported through this feature:

| Field Name	Data Format	Description
BrandID	string	unique text identifier for the brand
ServicePlan	Basic, Select, Trial, Gold Partner, Platinum Partner	name of service plan being used for an account
ParentAccountNo	string	ID of the parent account
AccountNo	string	unique ID of an account
IsSubAccount	0: parent account, 1: sub-account	flag indicating if the account is a parent account or a sub-account
UserName	string	login identifier for an account
CanViewCompressed	0: compressed not visible, 1: compressed visible	flag indicating if a customer is able to see the amount of compressed storage being used
UncompressedDiskGB	numeric	amount of uncompressed storage utilized for the parent account plus all of its sub-accounts (gigabytes) *displayed only for parent accounts *
CompressedDiskGB	numeric	amount of compressed storage utilized for the parent account plus all of its sub-accounts (gigabytes) *displayed only for parent accounts *
UncompressedDiskGBNoSub	numeric	amount of uncompressed storage utilized for only this account (gigabytes)
CompressedDiskGBNoSub	numeric	amount of compressed storage space utilized for this only account (gigabytes)

LocalUncompressedDiskGB	numeric	amount of uncompressed storage utilized for the parent account plus all of its sub-accounts (gigabytes) for local backups *displayed only for parent accounts *
LocalCompressedDiskGB	numeric	amount of compressed storage utilized for the parent account plus all of its sub-accounts (gigabytes) for local backups *displayed only for parent accounts *
LocalUncompressedDiskGBNoSub	numeric	amount of uncompressed storage utilized for only this account for local backups (gigabytes)
LocalCompressedDiskGBNoSub	numeric	amount of compressed storage utilized for only this account for local backups (gigabytes)
BillableMailboxes	numeric	number of mailboxes being archived for the parent account plus all of its sub-accounts *displayed only for parent accounts *
BillableMailboxesNoSub	numeric	number of mailboxes being archived for only this account
ProvisionedMailboxes	numeric	maximum allowable number of mailboxes to be archived for this account
HardQuotaMB	numeric	account storage limit set by the partner (megabytes)
UserHardQuotaMB	numeric	account storage limit set by the customer (megabytes)
CompanyName	string	name of partner company
CustomerCompanyName	string	name of company in the contact information for the parent account
FirstName	string	first name of account's primary contact
LastName	string	last name of account's primary contact
PhoneNumber	string	phone number of the account's primary contact
FaxNumber	string	fax number of the account's primary contact
EmailAddress	string	email address of the account's primary contact
AddressLine1	string	address, line 1, of the account's primary contact
AddressLine2	string	address, line 2, of the account's primary contact
City	string	city of the account's primary contact
State	string (two character code)	state of the account's primary contact
Zip	string	zip of the account's primary contact
Country	string (two character code)	country of the account's primary contact
LastBackupDate	yyyy-mm-dd hh:mm:ss	date and time of the last backup attempt
LastGoodBackupDate	yyyy-mm-dd hh:mm:ss	date and time of the last successful backup
Disabled	0: not disabled, 1: disabled	flag indicating if an account has been disabled

DisabledReason	string	optional description stating why an account has been disabled
ExpirationDate	yyyy-mm-dd hh:mm:ss	date and time when a trial account is set to expire
CreatedDate	yyyy-mm-dd hh:mm:ss	date and time when an account was created
DeletedDate	yyyy-mm-dd hh:mm:ss	date and time when an account was marked as deleted
Description	string	user description field that can be seen and modified by the customer
InternalDescription	string	internal description field that is seen and modified only by the partner

5-1 Monitoring Accounts with the Dash Panel

This chapter describes how you can use the Dash Panel page to monitor the status of all of your customer accounts.

To open the Dash Panel page, choose **Reports > Dash Panel** off the main menu bar.
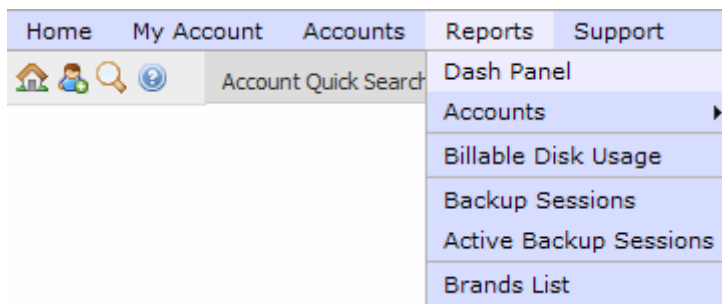
Customizing the Dash Panel display:

All of your active (non-deleted) accounts will be displayed in the Dash Panel. There are two options at the top of the page, **Sort Order** and **Group by account status**, that allow you to customize the order in which your accounts will be displayed.

1. With the **Sort Order** field you can choose from 13 different fields for sorting the Dash Panel accounts. The system defaults to "Customer".
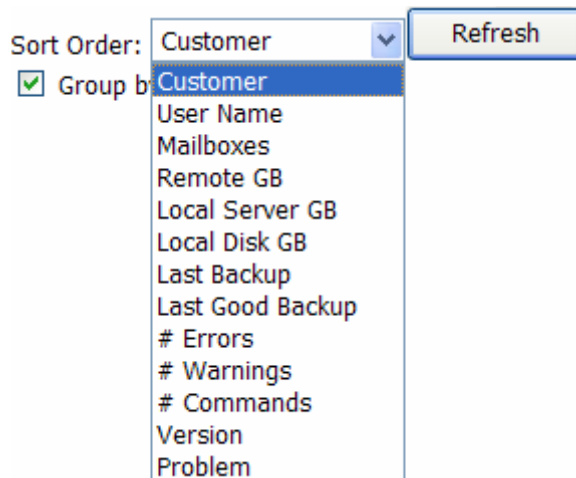
A detailed description of each of these sort order choices is explained under the dash panel column headings. The fields for "Remote GB", "Local Server GB", and "Local Disk GB" are all found under the column heading of "Disk GB".

2. Putting a check in the **Group by account status** box will cause the system to first group the account records by their account status and then sort within those groups by the field selected in the **Sort Order** box. Turning on this feature will cause the system to list the accounts in the most critical condition at the top of the list. The system defaults to having this feature turned on.

Sort Order: Customer ▼ Refresh
☑ Group by account status

3. Pressing the *Refresh* button will redisplayed the list of accounts so that it will include any new accounts that have been added since you entered this page.

Refresh

Reading the Dash Panel Display:

The dash panel display uses colors, icons and embedded operation-buttons to present valuable information about each of your accounts.

Status icons and highlight colors are used to help you quickly identify those accounts that may have experienced trouble during the backup or email archiving process and give you a quick indication as to the health of an account.

Status Icon	Highlight Color	Account Status Indication
	Red	Critical: there are one or more errors that needs immediate attention on this account.
	Yellow	Warning: there are warning messages from the last backup or email archiving or the account needs attention (e.g., the account could be close to their disk usage quota).
	Blue	Low Warning: the trial account has expired, but no backups were ever performed.
	Green	Good: the account is configured and all scheduled services (remote backup, local backup and/or email archiving) are functioning properly without errors.
	Blue	Note: the account has never backed up and has probably not yet been configured.

Storage Mode Icons are used to indicate accounts that are using multiple storage methods. A separate line is displayed for each type of backup storage used and an icon designates if the backup is being stored remotely, on a local server, or on a local disk drive. If no icon is displayed all then all backup data is stored remotely.

Storage Mode Icons may appear in the Dash Panel under the column headings for Disk Space (**Disk GB**), Last Backup (**Lst Bck [EST]**), Last Good Backup (**Lst Good Bck [EST]**), Errors (**Errs**), Warnings (**Warns**), and Commands (**Cmds**).

Storage Mode Icon	Storage Mode Indication
<blank>	only remote backup storage is being used
	remote backup storage is being used, as well as a second method
	backed up data for this account is being stored on a local backup server
	backup is being stored on a local disk drive

Like the account list, there are several embedded operation-buttons available in the dash panel (some operation buttons require a specific security role setting in order for them to be displayed). All operation-buttons are designated by square parentheses and shown in blue text, i.e. [V]. These operation-buttons will be discussed in reference to fields that they are displayed with.

Sort Example:

Below is an example of the Dash Panel display first sorted by "Customer" without using the **Group by account status** field, and then the same sort using the **Group by account status** field.

Sort by Customer

Sort by Customer with Group by Account Status

Description of Fields 1-3:

Customer

The **Customer** field shows the company name and contact name from the contact information in the format of "Company Name [Last Name, First Name]".

Use the Email operation-button, [E], to quickly send an email to the contact or this account.

> **Emailing a Customer** [E]
>
> The Email operation-button, [E], allows you to quickly send an email to your customer.

Press the Email operation-button [E] and your default mail program will open a new message with the recipient set to the customer's contact email address.

User Name

The **User Name** must be used when logging into an account on both the client software and the Web Portal. The user name is defined when an account is created and must be universally unique across all accounts (even accounts you do not own).

Pressing the View operation-button, [V], will allow you to view the backup session log for this account. The basic functionality of the Backup Session Log page is very similar to that of the account list.

Use the Impersonate operation-button, [I], to impersonate an account.

Impersonating an Account [I]

The Impersonate operation-button, [I], allows you look at a customer's account as if you were that customer. This is useful to change their password, contact information, or notifications.

Customer	User Name	Mlbxs
Brand: doc		
✖ Mort Networks [Point,Kathy] [E]	mortserver [V] [I]	
✖ Security Plus [Clark, Scott] [E]	security123 [V] [I]	
⚠ Eddie's TV Repair [Jones, Eddie] [E]	ETV-Truck01 [V] [I]	1 provisione
⚠ Eddie's TV Repair [Jones, Eddie] [E]	ETV-Truck02 [V] [I]	
✔ Eddie's TV Repair [Jones, Eddie] [E]	ETV-Primary [V] [I]	3 provisione

Press the Impersonate operation-button, [I], in the **User Name** field. The system takes you directly to the Contact Information page for the impersonated user. From here you can update any of the contact information or access any of the other menu pages.

⚠ *Just above the main menu, your user name and the user name of the account you are impersonating will be displayed. You have the same privileges or restrictions as the user you are impersonating.*

Professional Resellers, Inc

FredSmith.PRI is impersonating account DOC30199001 user ETV-Primary.

Home   My Account   Accounts   Support

Contact Information

CONTACT INFORMATION

Company Name: Eddie's TV Repair

First Name: Eddie

Last Name: Jones

⚠️ *The easiest way to change a user's password is to impersonate them and use the* **My Account > Change Password** *page. Because you are a partner impersonating the user, you do not need to know the old password in order to set a new one.*

To stop impersonating an account and return to the Account List page, press the "**Stop Impersonating**" link located above the main menu, on the far right side of the page.

Any changes you have made while impersonating another user will remain intact after you stop the impersonation and return to your own account.

Mlbxs

The email archiving is a separate product from the backup product and must be licensed separately. This field is not operational until licensed and enabled by the Customer Support Staff.

The **Mlbxs** field shows the number of mailboxes provisioned for email archiving and the number of mailboxes actually in use (which are billable at the end of each month). Zero or <blank> means that this feature is turned off for this account. If only a single number is shown, the number of provisioned mailboxes is the same as the number of billable mailboxes.

The number of provisioned mailboxes is the number of mailboxes the partner wants to allow a single computer with the archiving software installed on to be able to archive from. If you plan to archive from an Exchange journaling mailbox, then you must provision at least as many mailboxes as are in the Exchange store that contains the journaling mailbox (excepting aliases).

The billable mailboxes value will be the highest number of provisioned mailboxes actually used in the last 14 days. So if a customer decreases the number of provisioned mailboxes to less than what they are currently using, it will be about 14 days before the number of billable mailboxes decreases to the newly provisioned number.

⚠️ *A partner is billed based on the billable mailboxes count, not the provisioned mailboxes count.*

⚠️ *Trial accounts that are provisioned for email archiving will only allow email archiving to be used for 45 days from when the account was first provisioned for email archiving. Even if the trial has not expired, archiving will not work beyond 45 days.*

Description of Fields 4-8:

Disk GB	Lst Bck [EDT]	Lst Good Bck [EDT]	Errs	Warns	C
0.56	2008-07-02 11 am [V]	2008-07-02 11 am [V]	0	0	
6.67	2009-04-02 05 am [V]	Never [V]	23	1	3.
32.01 16.05	2009-04-02 05 am 2009-04-02 05 am [V]	2009-04-02 05 am Never [V]	0 2	0 0	
0.18	2009-04-02 03 pm [V]	Never [V]	0	1	2
8.25 [C]	Never	Never	0	0	0
8.25 [C]	2009-04-01 09 am [V]	2009-04-01 09 am [V]	0	0	8
0.92 (9%) 0.92	2009-04-02 12 am 2009-04-01 11 pm [V]	2009-04-02 12 am 2009-04-01 11 pm [V]	0 0	0 0	

Disk GB

The **Disk GB** field shows the total disk space used by this account in GB format (1024MB = 1GB). The disk space amount shown on all parent accounts is the total space used by the parent account plus all of it's sub-accounts.

A "[C: X.Y]" following the disk usage amount designates that the value displayed is the disk usage amount after the data has been compressed. The value "X:Y" shows the average compression ratio. This flag also indicates that this customer is able to view compressed disk storage usage amounts.

⚠️ *The compressed disk usage feature is not normally utilized, but is available for special requirements.*

If an account has defined quota for the maximum amount of storage allocated for an account, the percentage used of that quota is displayed as (Z%). The actual quota is the minimum of the two quotas (**Hard Quota MB** and **User Quota MB**) and of the amount of disk usage remaining under the parent account.

⚠️ *In general, a hard quota should only be set on an account if the customer has purchased a pre-determined amount of storage.*

Lst Bck [EDT]

The **Lst Bck [EDT]** field shows the date and time of the last attempted backup (successful or failed) performed on this account.   As in Disk GB, if multiple storage methods are used, a separate line is displayed for each type of backup storage used. An icon designates if the backup is being stored remotely, on a local server or local disk drive (if no icon is displayed all backup storage is remote). The format used is YYYY-MM-DD HH am/pm.

If the View operation-button, [V], is displayed, you can press it to view the backup session log for this account. The basic functionality of the Backup Session Log page is very similar to that of the account list.

Lst Good Bck [EDT]

The **Lst Good Bck [EDT]** field shows the date and time of the last successful backup performed on this account. A separate line is displayed for each type of backup storage used. An icon designates if the backup is being stored remotely, on a local server or local disk drive (if no icon is displayed all backup storage is remote). The format used is YYYY-MM-DD HH am/pm.

If the View operation-button, [V], is displayed, you can press it to view the backup session log for this account. The basic functionality of the Backup Session Log page is very similar to that of the account list.

The column heading displays the time zone designator that corresponds to the time zone setting for the user who is currently logged into the Web Portal. All date time fields displayed on the Dash Panel are displayed using the designated time zone.

Errs

The **Errs** field displays the number of error messages that have been generated by this account during the last backup.

Warns

The **Warns** field displays the number of warning messages that have been generated by this account during the last backup.

Description of Fields 9-11:

Cmds	Version	Problem
13	3.0.10	No remote backup within 3 days.
3,010	3.0.10	Never had an error-free remote backup. Backup had 23 error(s). Backup had 1 war
⊚ 796 ⊑ 1,310	3.5.1	Never had an error-free local disk backup. [Status Details]
21	3.0.10	Never had an error-free remote backup. Backup had 1 warning(s). [Status Details]
0		Never had a remote backup.
825	3.5.1	
⊚ 160 ⊑ 160	3.5.1	

Cmds

The **Cmds** field displays the number of commands that were issued by the backup manager software for this account during the last backup.

Version

The **Version** field displays the version number of the backup manager software.

Problem

The **Problem** field displays a description of the current note, warning or error for the account.

If the Status Details operation-button, [Status Details], is displayed it can be pressed to cause the system to provide an expanded view of the problem message. Pressing [Status Details] a second time will close the expanded view.

Problem

No remote backup within 3 days.

Never had an error-free remote backup. Backup had 23 error(s). Backup had 1 warning(s). [Status Details]

Remote Backup: 0x40002: Could not open the file or directory because it has been opened exclusively by a
Remote Backup: 0x40002: Could not open the file or directory because it has been opened exclusively by
Remote Backup: 0x40002: Could not open the file or directory because it has been opened exclusively by a
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Remote Backup: 0x40002: Could not open the file or directory because it has been opened exclusively by
Remote Backup: 0x40002: Could not open the file or directory because it has been opened exclusively by a
Remote Backup: Your password is temporary and needs to be changed immediately. Please use the My Ac

Never had an error-free local disk backup. [Status Details]

Local Disk Backup: 0x2000E: The server does not know the previous connection was canceled. Your softw

Never had an error-free remote backup. Backup had 1 warning(s). [Status Details]

Remote Backup: Your password is temporary and needs to be changed immediately. Please use the My Ac

Never had a remote backup.

Thank you for choosing eFolder.

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