Quick guide to creating customers on the ReVirt365 management portal

Version 2.0

How to create a ‘self-serviced’ customer

How you get started

1. Follow the URL from your invitation email and the instructions that follow
2. If this is your first login, please accept the terms as you go along.

This will take you to an overview of the customers you have as a reseller.
For your first login, this overview is empty.

The left-hand column

1. Just below “Welcome”, the portal will show under which company you are logged in.
2. The button called “Log”: This will show you a log with events and which user initiated the event. Please use the dropdown menu on the right to apply filters. Its default setting is “Everything”.
3. The button called “Add new customer” takes you to where you can add new customers.

Add new customer

1. Customer info: This section is **mandatory** and will vary according to the specific setup for each customer. The customer name is mandatory, whereas the customer number and PO number are optional.
2. Customer invitation: Click “Yes” to invite a specific user to put in their credentials themselves.
3. Licenses sold: This section is **mandatory** and this is where you specify how many licenses your customer is buying from you. The license quantity is adjusted accordingly. Please note that at least one license has to be selected in order for the customer to be created,.
4. Data location: This section is **mandatory** and this is where you click on the different locations to specify where your data is to be stored. Please note that changes to the data location **cannot** be made **after** this initial selection. Changes require a new customer to be set up, which means that all history is lost for the present entry.
5. When you have completed your specification, please click “Add new customer”.

That’s it!

Your customer has now been invited and can start using the solution.