Guide to getting started on the ReVirt365 management portal as a reseller

Version 2.0

Welcome to our step-by-step guide to getting started on the ReVirt365 management portal as a reseller!

Please keep the following important points in mind:

1. In order to use this portal, you have to have a Microsoft user account already as well as an invitation email with an URL.
2. Please note that your initial login page looks the same for everyone, regardless if you are a partner, a reseller or an end-customer.
3. Regarding 2FA: The authentication process for the portal mirrors the one in your company policy, which means that if your company policy requires 2FA, so will the portal.
4. The portal has 3 levels: Partners, resellers and end-customers.
5. Settings, rights and views will vary according to whether you are a partner, a reseller or an end-customer.

How you get started as a reseller

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.

More about the overview

This overview offers (to the right) a list of customers + a status on each of your customers as well as some options for you (to the left).
The numbers at the very bottom of the page are your reseller totals.

The left-hand column

1. Just below "Welcome", the portal will show under which company you are logged in as.
2. The button called "Log": will show you a log with events and what user who initiated the event. Please use the dropdown menu on the right to apply filters. Its default setting is "Everything".
3. The button called "Reseller users": This is where you click to add a new reseller user with the same rights as yourself. See more details below.
4. The button called "Settings": This is where you customise your email settings, phone numbers, and more.
5. The button called "Add new customer" takes you to where you can add new customers.

More about the page "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, the customer number and PO number is optional.
2. Customer invitation: A selection if you wish to invite a specific user to put in their credentials themselves, or if you wish to put them in directly yourself on their behalf. Please select "No", if you wish to wish to put in the credentials yourself.
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 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".
6. The next steps will vary according to what your specified level of management from your side is, so please follow the instructions on the page.
7. Your options on the left-hand side of the page will vary according to your specified level of management.

How you get started as a reseller

Important information regarding deleting a customer

Should you want to delete a customer, you will be asked to confirm that this is really what you want. If you confirm, that marks the beginning of a grace period of 7 days, before the customer is deleted.
During that grace period, you can cancel the deletion. Just click on the customer in question, and choose the "Cancel deletion" option to the right of the red warning. Once you confirm, everything is back to normal.

About "Create new tenant"

This option will appear in the left-hand column.
Clicking this button will take you to a page, where you have to decide between basic authentication and modern authentication.
Modern authentication is more secure than basic authentication, but requires 2FA.
Please feel free to check out our support page with a guide on how to set up modern authentication. Link here.
Please note that to set this up, you will require a high level email account (preferably an admin account).

How you set up a tenant

1. Decide between basic and modern authentication and complete the relevant steps.
2. Click on the relevant "Set up tenant with" option.
3. Please allow the portal to check with the Microsoft's systems, if the user with the credentials you entered is allowed access.
4. If not successful, an error message will appear on your screen.
5. If successful, please click on "Continue".

About setting up a backup job

- Now that the customer has a tenant created, the next step is to set up a backup job. Please click the customer again. You will see the button "Set up backup job" is now available in the left-hand column.
- Please note that in the right-hand corner of the page, "Tenant" is now green, whereas "Backup job" is still red, so that is where we go next.

How you set up a backup job

1. Click on "Set up backup job" in the left-hand column.
2. Choose whether you want your settings to apply to the entire organisation or to selected groups. We recommend that smaller companies go for similar settings for the entire organisation, but please specify to your liking.
3. Select your daily backup time.
4. Please select a retention period for the customer.
5. Click "Add backup job" and confirm that it is what you wanted.

How you get started as a reseller

You are getting VERY close now!

You now have a detailed overview of your backup jobs, including their specific slots. If this is your first backup job, its status will be "Stopped", as it has not yet had its first run. In the upper right-hand corner, your status has now changed, so **both** your tenant and your backup jobs are green.
If you tick the box to the left of each backup job, 2 options will appear: "Run backup job now" and "Delete backup job" .
If you run the backup job, its status changes to "Running". Please note that the status of each job is not a live status. You can refresh the list on your left-hand side.
If you want to delete the backup job, you will be asked to confirm that this is really what you want. The deletion will be effective immediately and cannot be undone.

About your customer list

Your customer list is alphabetical, and it lets you do searches.
In your customer list, you may have noticed some fields in the top right-hand corner of the portal page. They are there for your convenience, so it will be easy for you to find specific customers.

- Re. customer no.: This field takes you straight to the customer you are looking for, if you enter their customer number.
- Re. name: This field will start you at the customer you are looking for as well as show all the following customers.

And last, but not least: About your customer card

If you pull up your customer card, there are a couple of fields that are of particular interest: "Licenses" and "Consumed".
Please note that "Consumed" is updated every 24 hours, whereas "Licenses" is changed manually according to what has been sold. If the number in "Consumed" exceeds what is marked in "Licenses", both the reseller and the customer get a notification/report and red marking will appear.

The reseller can make changes to the number of licenses, whereas viewing is the only option for each customer. All the reseller has to do is click on the relevant field, make the changes and confirm. The same applies to emails and company names.