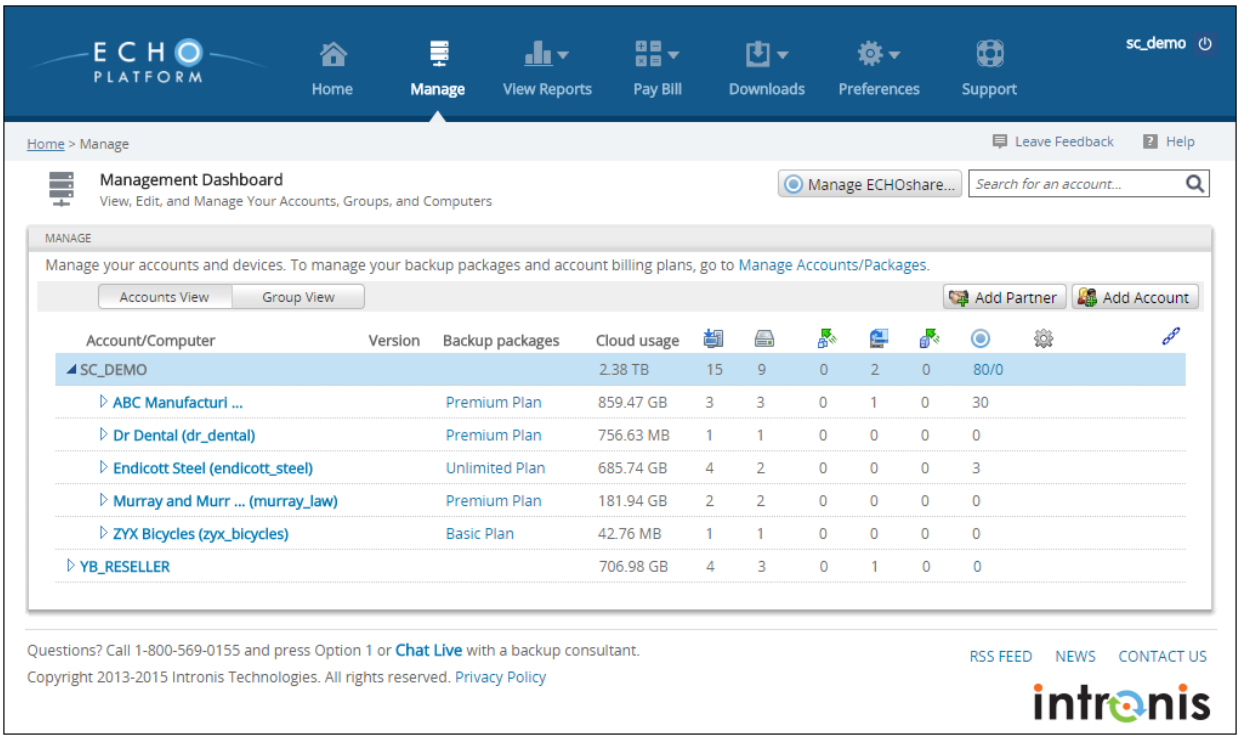
Adding a Client Account

https://campus.barracuda.com/doc/93196633/

As a partner, you will add a client account for each company who wishes to have their computers backed up with Intronis. The client account serves to house all a client's computer accounts and combines those computer accounts' data usage and licenses for billing purposes. A client account acts as a single point at which to apply policies such as preferences or notification templates instead of to each computer account individually. This guide will show you how to create a client account in the management portal.

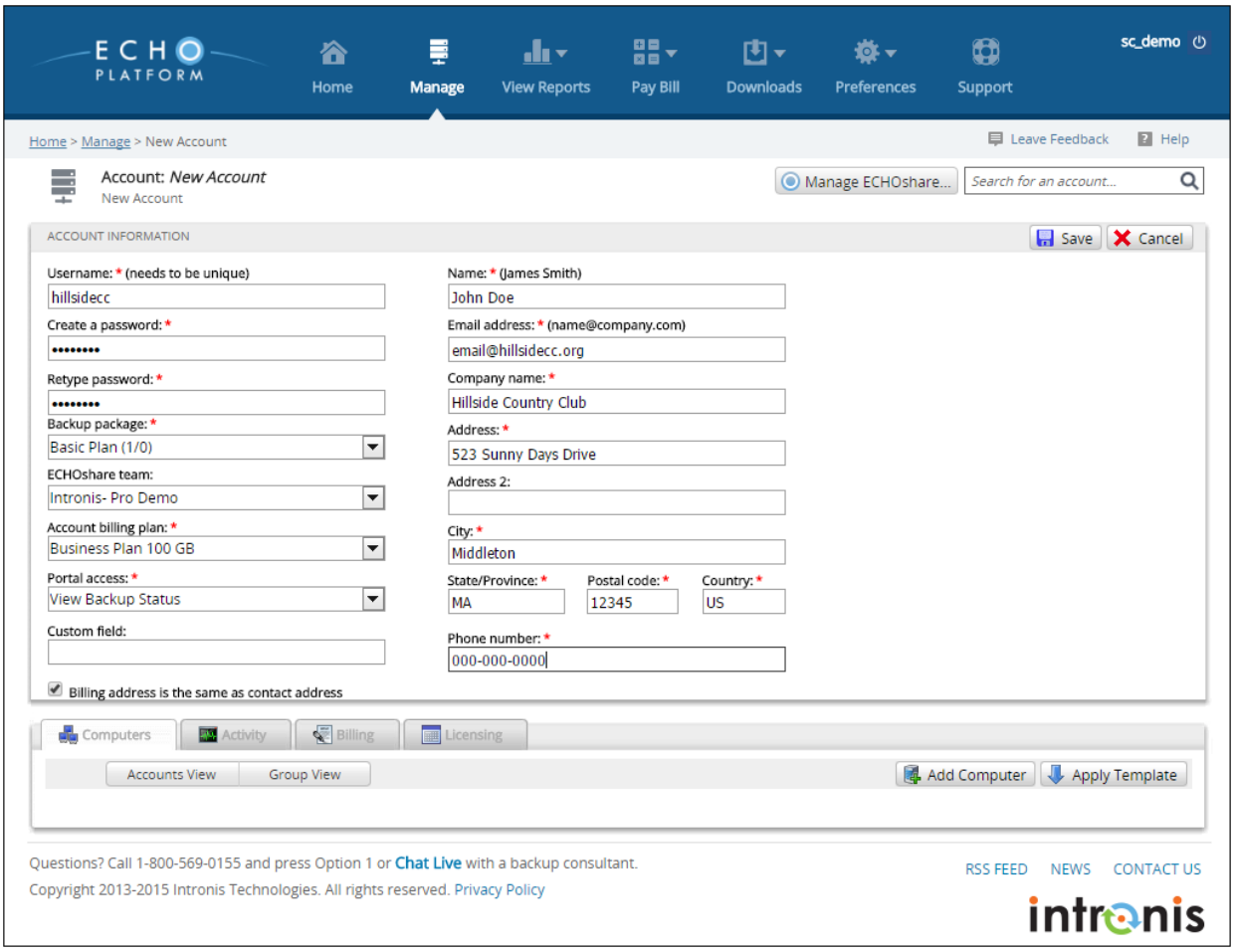
Directions

1. Log in to the management portal and then navigate to the **Manage** tab. You should see your partner account with a list of the existing client accounts within it.

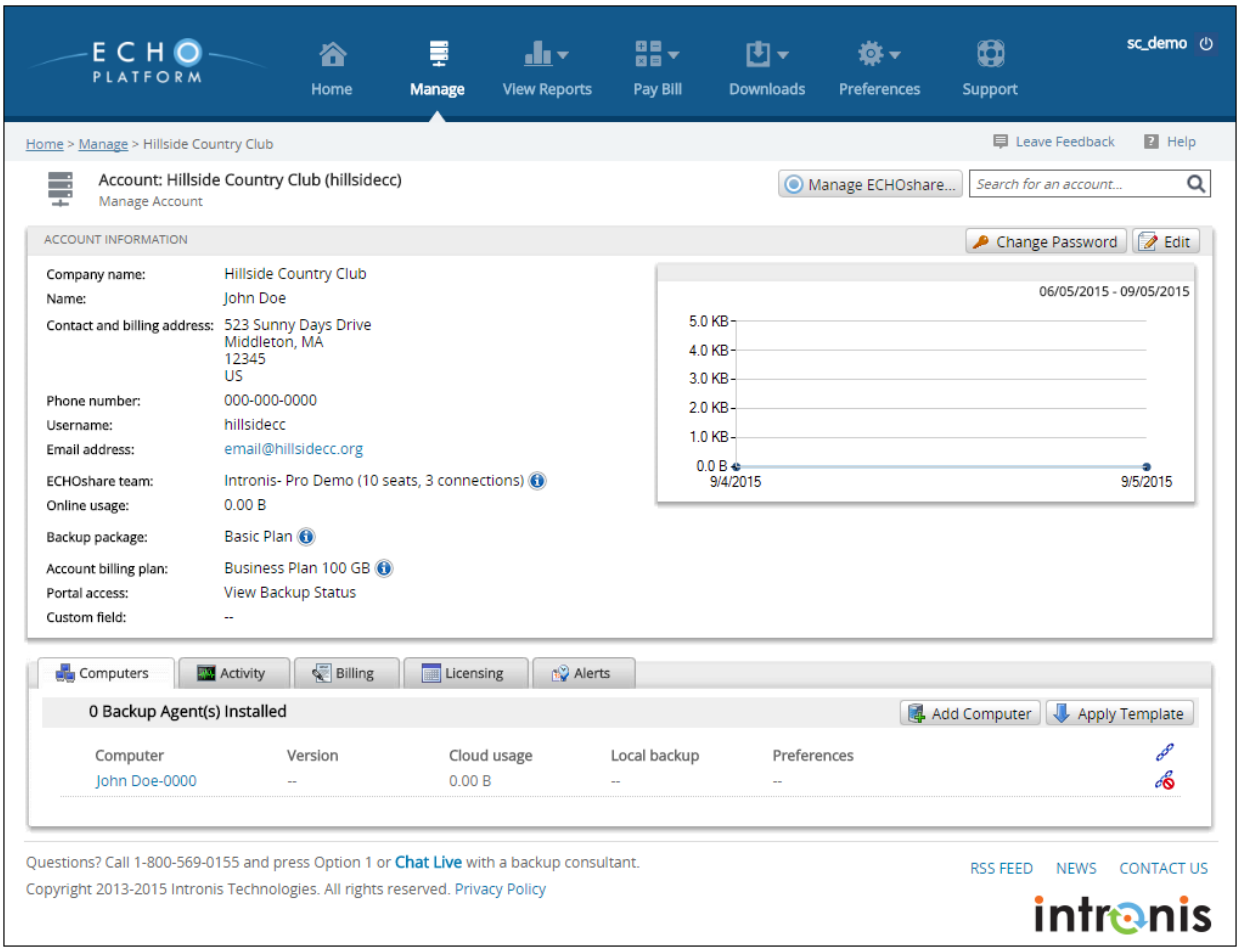


2. Click on the **Add Account** button on the right to open the **New Account** page. Here is where you will fill in the client account information. The following is an explanation of some of those fields:
   - *Username/Password* - This is what your client will use to log into the management portal. Once the username is set, it cannot be changed. This field needs to be unique and has a 16 character limit.
   - *Portal Access* - This field determines what your clients will be able to do when they log in

to the management portal. The two choices are View Backup Status and Create/Edit, Delete, and Restore.
- *Backup Package* - The backup package is comprised of the base package size and price, over-usage size and price, and numerous license prices. This is what you will pay to provide backup service to your clients.
- *Account Billing Plan* - Similar in composition to the backup package, the account billing plan is what you will use to bill your clients. More information about billing plans can be found here.



3. When you are finished filling in the client account information, press **Save**. Notice how, upon creating the client account, an accompanying computer account (subaccount) is automatically created. If you need to add more computer accounts, please see this article.


ECHO PLATFORM
Home
Manage
View Reports
Pay Bill
Downloads
Preferences
Support
sc_demo
Home > Manage > Hillside Country Club
Leave Feedback
Help
Account: Hillside Country Club (hillsidecc)
Manage Account
Manage ECHOshare...
Search for an account...
ACCOUNT INFORMATION
Change Password
Edit
Company name: Hillside Country Club
Name: John Doe
Contact and billing address: 523 Sunny Days Drive Middleton, MA 12345 US
Phone number: 000-000-0000
Username: hillsidecc
Email address: email@hillsidecc.org
ECHOshare team: Intronis- Pro Demo (10 seats, 3 connections)
Online usage: 0.00 B
Backup package: Basic Plan
Account billing plan: Business Plan 100 GB
Portal access: View Backup Status
Custom field: --
06/05/2015 - 09/05/2015
5.0 KB
4.0 KB
3.0 KB
2.0 KB
1.0 KB
0.0 B
9/4/2015
9/5/2015
Computers
Activity
Billing
Licensing
Alerts
0 Backup Agent(s) Installed
Add Computer
Apply Template
Computer
Version
Cloud usage
Local backup
Preferences
John Doe-0000
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0.00 B
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Questions? Call 1-800-569-0155 and press Option 1 or Chat Live with a backup consultant.
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Figures

1. managepage.png
2. createclientaccountpage.png
3. finishedclientaccount.png

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