

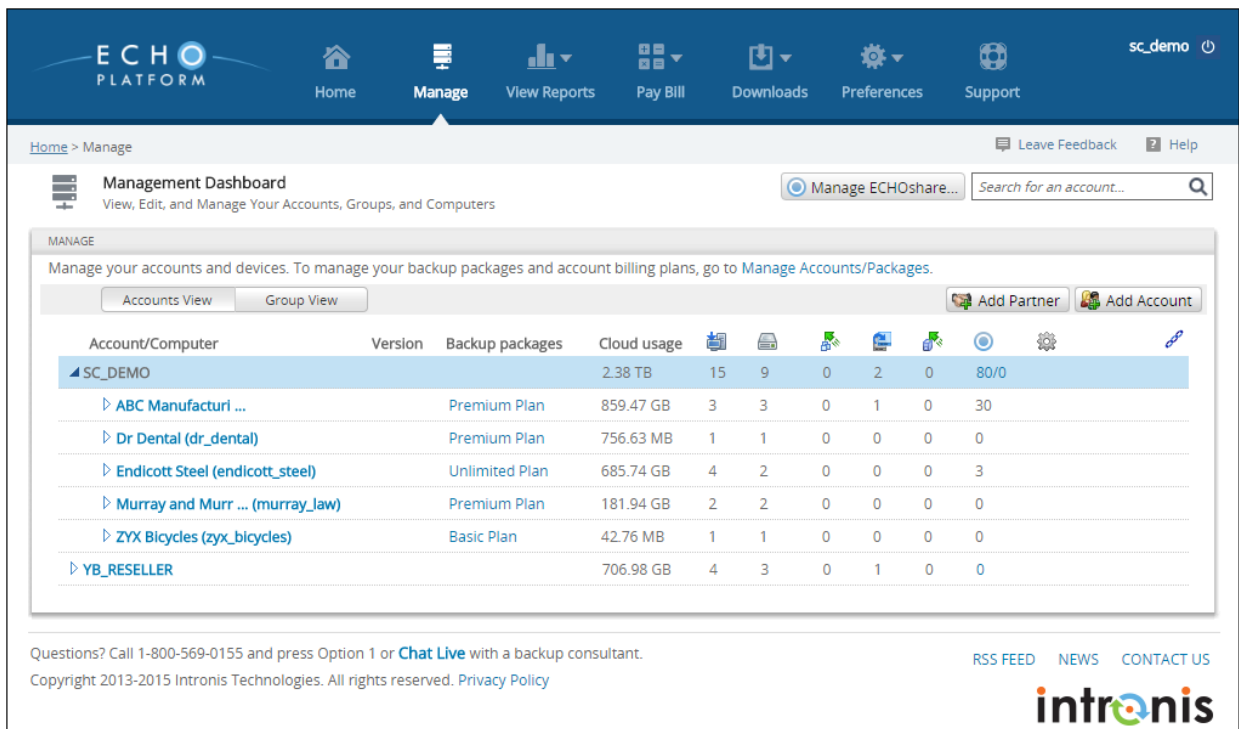
Adding a Client Account

<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.



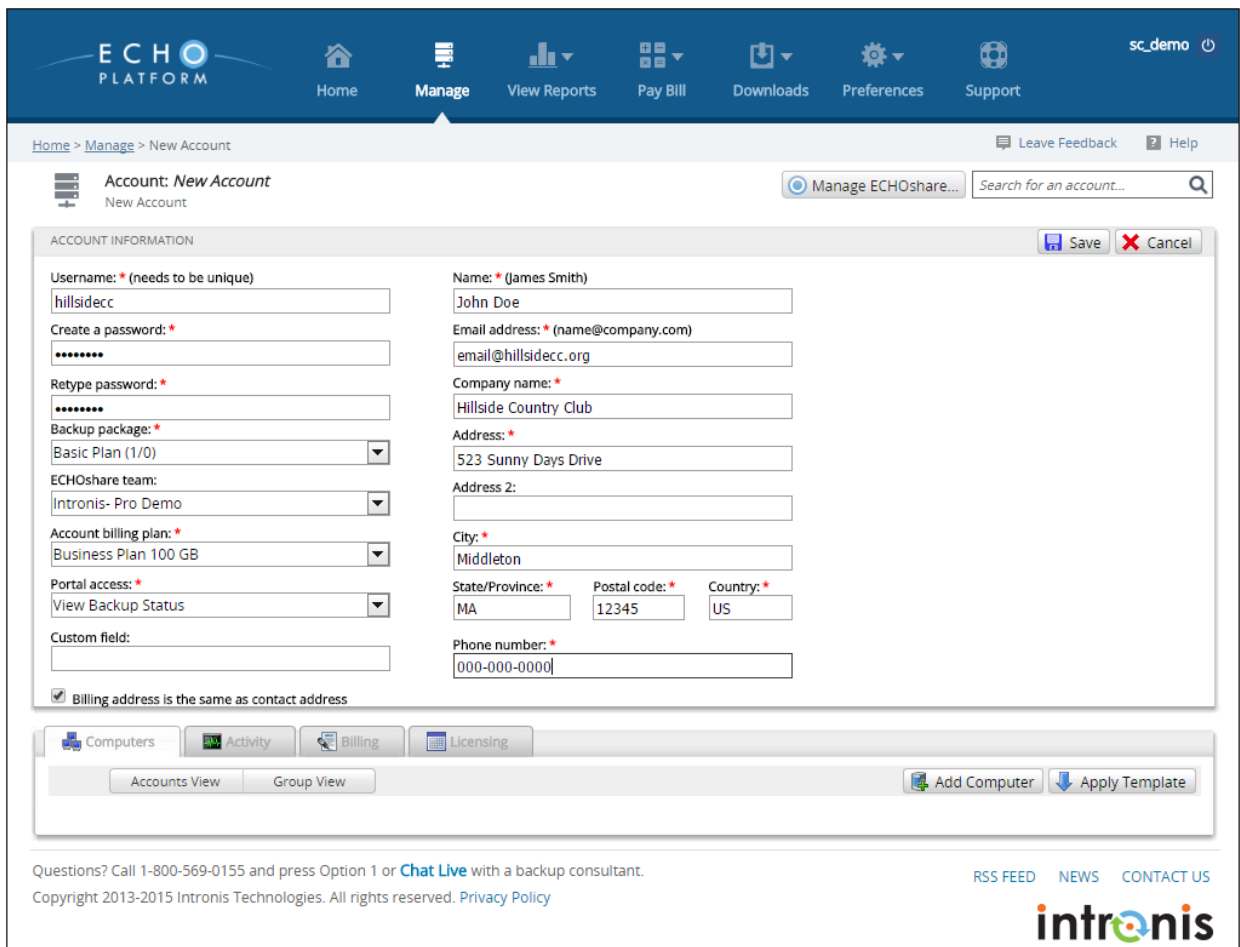
The screenshot shows the ECHO Platform Management Dashboard. The top navigation bar includes links for Home, Manage, View Reports, Pay Bill, Downloads, Preferences, and Support. The 'Manage' tab is active. Below the navigation bar, there's a 'Management Dashboard' section with a search bar and a 'Manage ECHOshare...' button. The main content area displays a table of client accounts under the 'MANAGE' section. The table has columns for Account/Computer, Version, Backup packages, Cloud usage, and various status icons. The first account listed is 'SC_DEMO' with a cloud usage of 2.38 TB. Below it are several other accounts like 'ABC Manufacturi ...', 'Dr Dental (dr_dental)', 'Endicott Steel (endicott_steel)', 'Murray and Murr ... (murray_jaw)', 'ZYX Bicycles (zyx_bicycles)', and 'YB_RESELLER'.

Account/Computer	Version	Backup packages	Cloud usage	15	9	0	2	0	80/0
SC_DEMO			2.38 TB	15	9	0	2	0	80/0
ABC Manufacturi ...	Premium Plan		859.47 GB	3	3	0	1	0	30
Dr Dental (dr_dental)	Premium Plan		756.63 MB	1	1	0	0	0	0
Endicott Steel (endicott_steel)	Unlimited Plan		685.74 GB	4	2	0	0	0	3
Murray and Murr ... (murray_jaw)	Premium Plan		181.94 GB	2	2	0	0	0	0
ZYX Bicycles (zyx_bicycles)	Basic Plan		42.76 MB	1	1	0	0	0	0
YB_RESELLER			706.98 GB	4	3	0	1	0	0

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](#).



ECHO PLATFORM Home Manage View Reports Pay Bill Downloads Preferences Support sc_demo

Home > Manage > New Account

Account: New Account
New Account

Manage ECHOshare... Search for an account...

ACCOUNT INFORMATION Save Cancel

Username: * (needs to be unique)
hillsidecc

Create a password: *

Retype password: *

Backup package: *
Basic Plan (1/0)

ECHOshare team:
Intronis- Pro Demo

Account billing plan: *
Business Plan 100 GB

Portal access: *
View Backup Status

Custom field:

Name: * (James Smith)
John Doe

Email address: * (name@company.com)
email@hillsidecc.org

Company name: *
Hillside Country Club

Address: *
523 Sunny Days Drive

Address 2:

City: *
Middleton

State/Province: *
MA

Postal code: *
12345

Country: *
US

Phone number: *
000-000-0000

☒ Billing address is the same as contact address

Computers Activity Billing Licensing

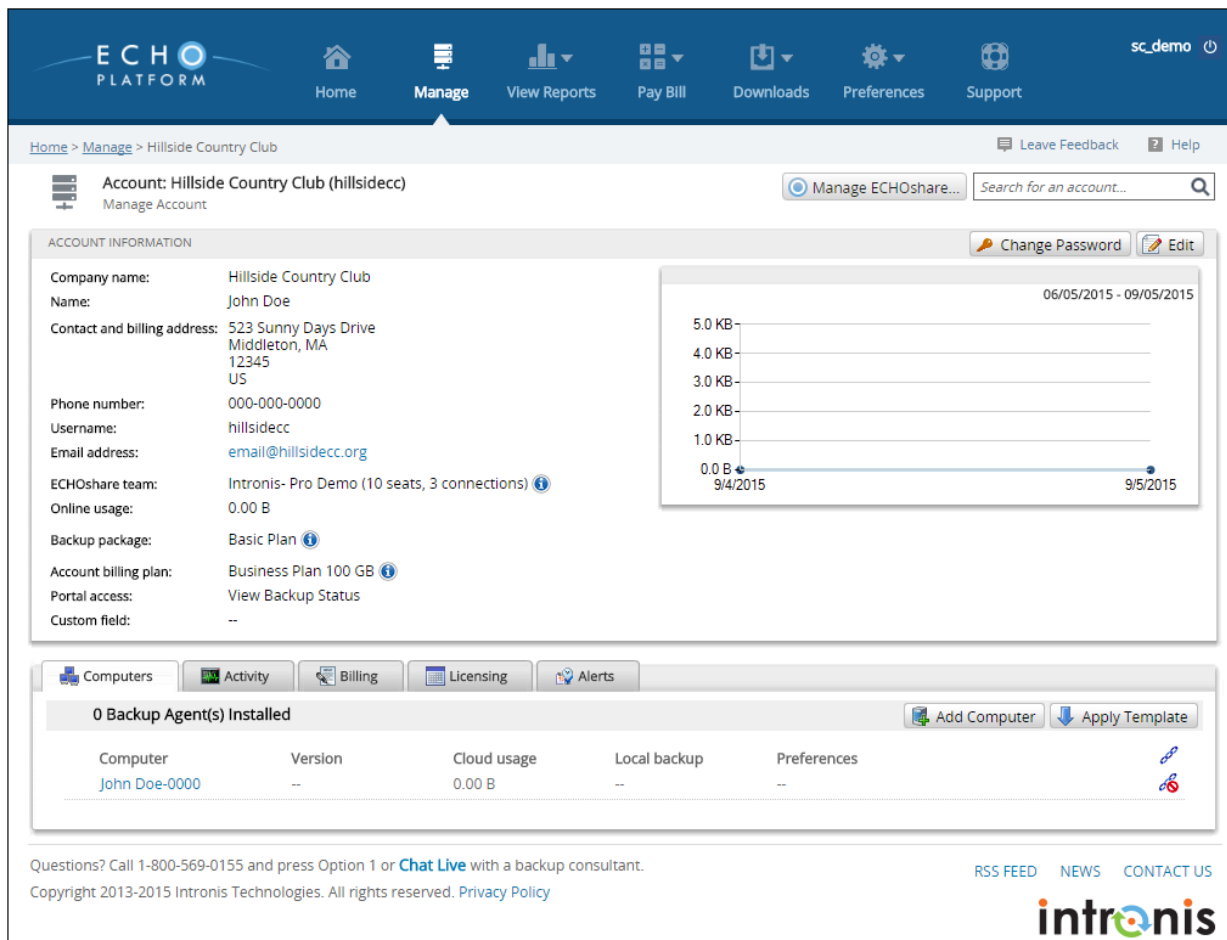
Accounts View Group View Add Computer Apply Template

Questions? Call 1-800-569-0155 and press Option 1 or [Chat Live](#) with a backup consultant.
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intronis

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](#).



The screenshot displays the ECHO PLATFORM interface for managing an account. The top navigation bar includes links for Home, Manage, View Reports, Pay Bill, Downloads, Preferences, and Support. The user is logged in as 'sc_demo'.

The main content area shows the account details for 'Hillside Country Club (hillsidecc)'. The account information includes:

- 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: --

A graph shows usage from 06/05/2015 to 09/05/2015, with a peak of 5.0 KB on 9/4/2015.

Below the account information, there are tabs for Computers, Activity, Billing, Licensing, and Alerts. The 'Computers' tab shows 0 Backup Agent(s) Installed. A table lists the installed agents:

Computer	Version	Cloud usage	Local backup	Preferences
John Doe-0000	--	0.00 B	--	--

At the bottom, there are links for RSS FEED, NEWS, and CONTACT US, along with the Intronis logo and copyright information.

Figures

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

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