# Veeam Data Cloud for Microsoft 365

## Guide for Service Providers

December, 2025

© 2025 Veeam Software.

All rights reserved. All trademarks are the property of their respective owners.

No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language in any form by any means, without written permission from Veeam Software (Veeam). The information contained in this document represents the current view of Veeam on the issue discussed as of the date of publication and is subject to change without notice. Veeam shall not be liable for technical or editorial errors or omissions contained herein. Veeam makes no warranties, express or implied, in this document. Veeam may have patents, patent applications, trademark, copyright, or other intellectual property rights covering the subject matter of this document. All other trademarks mentioned herein are the property of their respective owners. Except as expressly provided in any written license agreement from Veeam, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

**NOTE**

Read the End User Software License Agreement before using the accompanying software programs. Using any part of the software indicates that you accept the terms of the End User Software License Agreement.

# Contents


CONTACTING VEEAM SOFTWARE ..... 5
ABOUT THIS DOCUMENT ..... 6
WELCOME TO VEEAM DATA CLOUD FOR MICROSOFT 365 ..... 7
Security ..... 8
MIGRATION OF EXISTING CUSTOMERS TO NEW VEEAM DATA CLOUD PORTAL ..... 10
GETTING STARTED FOR SERVICE PROVIDERS ..... 11
ACCESSING VEEAM DATA CLOUD FOR MICROSOFT 365 ..... 12
MANAGING CUSTOMERS ..... 16
Creating Customers ..... 17
Assigning Roles in ProPartner Portal ..... 18
Onboarding Customers ..... 19
Managed Onboarding ..... 20
Self-Service Onboarding ..... 26
Viewing Customers ..... 27
Editing Customers ..... 29
Exporting Customers Data ..... 32
Adding Admin Users ..... 33
Offboarding Customers ..... 34
PERFORMING BACKUP ..... 35
Creating Flex Backup Policies ..... 36
Editing Flex Backup Policies ..... 37
Viewing Backup Logs ..... 38
Performing Backup Policy Actions ..... 40
Supporting Self-Service Backups ..... 41
PERFORMING RESTORE ..... 42
Managed Data Restore ..... 43
Self-Service Data Restore ..... 44
VIEWING DASHBOARD ..... 45
MONTHLY USAGE REPORTING ..... 47
MANAGING PORTAL SETTINGS ..... 50
Editing Account Details ..... 51
Managing Roles ..... 52
Creating Roles ..... 53
Editing Roles ..... 55
Deleting Roles ..... 56
Managing Users ..... 57

Adding Users ..... 58
Editing Users ..... 59
Editing Users in Bulk ..... 60
Deleting Users ..... 61
Managing System Notifications ..... 62
Setting Customer Support ..... 63
SWITCHING TO CUSTOMER PORTAL ..... 64
VIEWING VEEAM DATA CLOUD STATUS ..... 65
GETTING SUPPORT ..... 67

# Contacting Veeam Software

At Veeam Software we value feedback from our customers. It is important not only to help you quickly with your technical issues, but it is our mission to listen to your input and build products that incorporate your suggestions.

## Customer Support

Should you have a technical concern, suggestion or question, visit the Veeam Customer Support Portal to open a case, search our knowledge base, reference documentation, manage your license or obtain the latest product release.

## Company Contacts

For the most up-to-date information about company contacts and office locations, visit the Veeam Contacts Webpage.

## Online Support

If you have any questions about Veeam products, you can use the following resources:

- Full documentation set: veeam.com/documentation-guides-datasheets.html
- Veeam R&D Forums: forums.veeam.com

# About This Document

This guide is intended for IT managers, virtual infrastructure administrators, and other personnel responsible for the product deployment and operation.

This document describes the features included in Veeam Data Cloud for Microsoft 365. It also provides usage examples and gives step-by-step instructions that will help you better understand how to use Veeam Data Cloud for Microsoft 365.

## Intended Audience

The document is intended for backup administrators and other IT professionals who plan to use Veeam Data Cloud for Microsoft 365.

# Welcome to Veeam Data Cloud for Microsoft 365

The Service Provider Portal is a web application for Veeam Cloud & Service Provider (VCSP) partners. It provides a centralized view of Veeam Data Cloud customers and their platform usage. The portal lets you onboard customers, manage and monitor customer backup policies, and simplify customer oversight with detailed reports and insights.

The ProPartner Network offers a step-by-step click-through demonstration of the Veeam Data Cloud journey for service providers. To start the demonstration, go to https://vee.am/VDCM365demo.

# Security

This section lists fundamental security features of Veeam Data Cloud for Microsoft 365 customer portal.

## Certifications

Veeam holds numerous certifications, including ISO/IEC 27001, and is continuously investing, innovating, and adding to industry and regulatory credentials to help ensure your data is protected and secure. For more information, see Veeam Trust Center.

## Data Sovereignty

Data is stored in a dedicated storage account in the region of your choice.

## Redundant Storage

Utilizes Local Redundant Storage (LRS) by default, where three copies of customer data are stored on three separate disks within the primary Azure region.

## Isolated Environment

Backup data is stored in a virtually air-gapped location, hosted by Veeam in Microsoft Azure. This environment is isolated and decoupled from both Microsoft 365 and customer infrastructure. Customers also benefit from the inherent data security provided by Microsoft Azure at the storage level.

## Encryption

Utilizes 256-bit encryption for all data in-transit and at-rest.

## Immutability

Offers service-level immutability capabilities on the primary backup. Once the data is backed up, it cannot be altered, tampered with, or deleted by users, including administrators or attackers.

## Multi-Factor Authentication (MFA)

Utilizes Microsoft single sign-on with Multi-Factor Authentication.

## Retention Period

The retention period can be set from 1 to 25 years or unlimited.

## Pen-tested

Regular penetration tests carried out by a 3rd party specialist provider.

# Service Level Agreements (SLAs)

99.9% uptime — excluding planned outages.

# Migration of Existing Customers to New Veeam Data Cloud Portal

The new Veeam Data Cloud portal introduces a unified experience platform, enabling service providers to manage all customer workloads from a single interface. Migration from the legacy Veeam Data Cloud portal to the new Veeam Data Cloud portal will occur in batches.

Existing customers will be migrated to the new portal automatically — no action is required from service providers. The migration applies to all customers with pending onboarding or with active subscriptions.

For answers to most commonly asked questions about the migration, see this Veeam KB article.

## How Migration Works

During the migration process, the data of your customers and service configurations remain unchanged, and only portal access details are updated.

- No Microsoft 365 data of your customers is moved during migration.
- Backup policy settings remain unchanged.
- User accounts and role assignments are transferred to the new Veeam Data Cloud portal.
- Once migration is complete, partners can log into the new Veeam Data Cloud portal. For details, see Accessing Veeam Data Cloud.
- If service providers attempt to log in to the legacy portal after migration, they will see a migration message with a link to the new Veeam Data Cloud portal.

## Customer Management Before Migration

Until you are notified that your migration is complete:

- Continue managing your customers using the legacy Veeam Data Cloud portal.
- Any new Microsoft 365 subscriptions created before migration will also be provisioned in the legacy Veeam Data Cloud portal, and must be managed there until migration is complete.
- Non-Microsoft 365 subscriptions are managed in the new Veeam Data Cloud portal, while Microsoft 365 data remains in the legacy portal.

## Customer Management After Migration

Once your migration is complete, use the new VDC portal for all supported workloads, including Microsoft 365. For more information, see the Veeam Data Cloud Guide for Service Providers.

# Getting Started for Service Providers

Veeam Data Cloud for Microsoft 365 supports integration with the Veeam Cloud & Service Provider (VCSP) program. Partners of the program (service providers) can use Veeam Data Cloud to offer Microsoft 365 backup as a service to their customers. To start using Veeam Data Cloud for Microsoft 365, the service provider must complete the following steps:

1. Create and register a Veeam Data Cloud customer. To do this, use the VCSP Pulse portal. If you want Veeam Data Cloud for Microsoft 365 to back up the data of your Microsoft 365 tenant, you can also register your organization as a customer. For details, see the Creating Customers section of the Veeam Data Cloud Guide for Service Providers.
2. Request a subscription for a Veeam Data Cloud product. You can also create a new customer when requesting new subscriptions. For details, see the Requesting Subscriptions section of the Veeam Data Cloud Guide for Service Providers.
3. Complete the customer onboarding. To do this, use the Veeam Data Cloud for Microsoft 365 portal for service providers. For details, see Onboarding Customers.

Once the service provider completes the customer onboarding, they can start performing data backup tasks and administrative tasks with customer accounts, as described in the subsequent sections of this guide. The service provider can also let customers manage their backup settings and work with their backup data using the Veeam Data Cloud for Microsoft 365 customer portal. For more information, see the Veeam Data Cloud for Microsoft 365 User Guide.

Veeam Data Cloud usage reporting is collected automatically and populated in the VCSP Pulse Monthly Usage report. For more information on how Rental licensing works within Veeam Data Cloud, how to manage licenses using VCSP Pulse, and how to collect and report the license usage, see the Veeam Rental Licensing and Usage Reporting Guide.

# Accessing Veeam Data Cloud for Microsoft 365

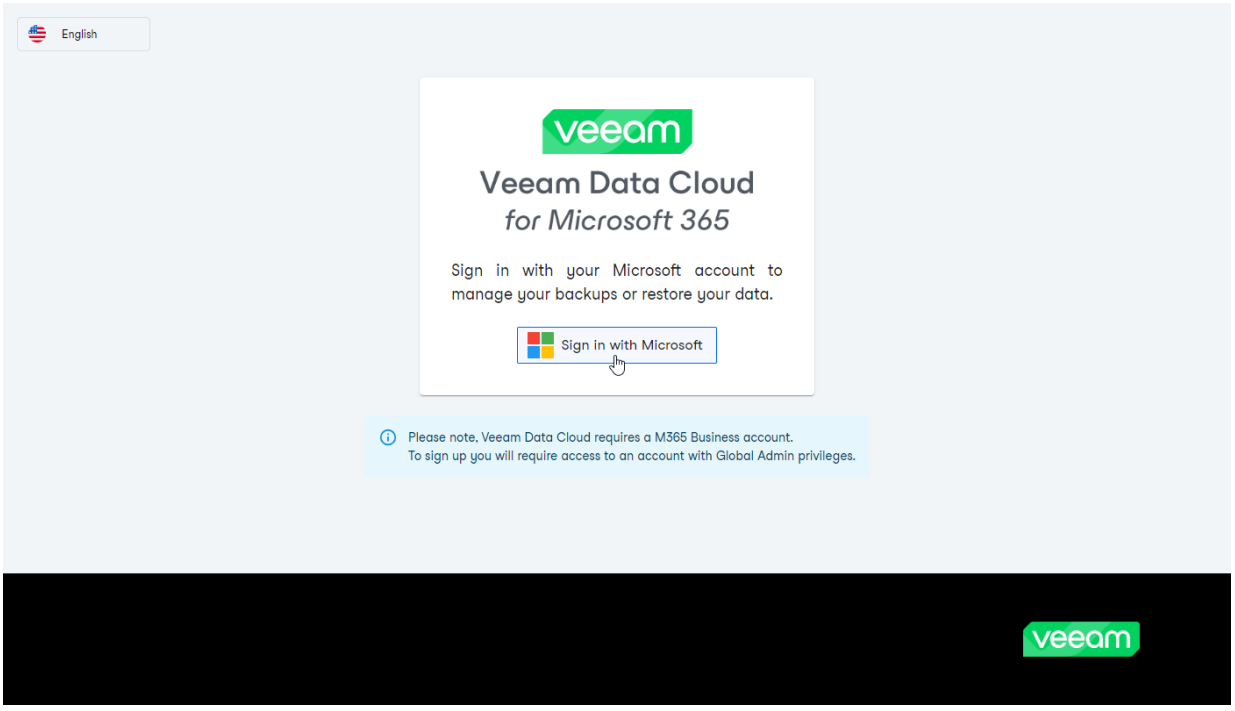
To access Veeam Data Cloud for Microsoft 365, you can use the direct link to the Veeam Data Cloud for Microsoft 365 portal that you received in your invitation email or go to the Log in to Veeam webpage.

To log in to the Veeam Data Cloud for Microsoft 365 portal use your Microsoft 365 account. Before you log in, ensure that the account is registered in VCSP Pulse or it is added as a user in Veeam Data Cloud for Microsoft 365.

## Logging In with Invitation Link

To log in to Veeam Data Cloud for Microsoft 365 using the link that you received in your invitation email, do the following:

1. In the invitation email that you received, click **Visit Customer Management Portal**.
2. On the Veeam Data Cloud for Microsoft 365 portal, click **Sign in with Microsoft**. You will be redirected to the Microsoft Entra authentication page.



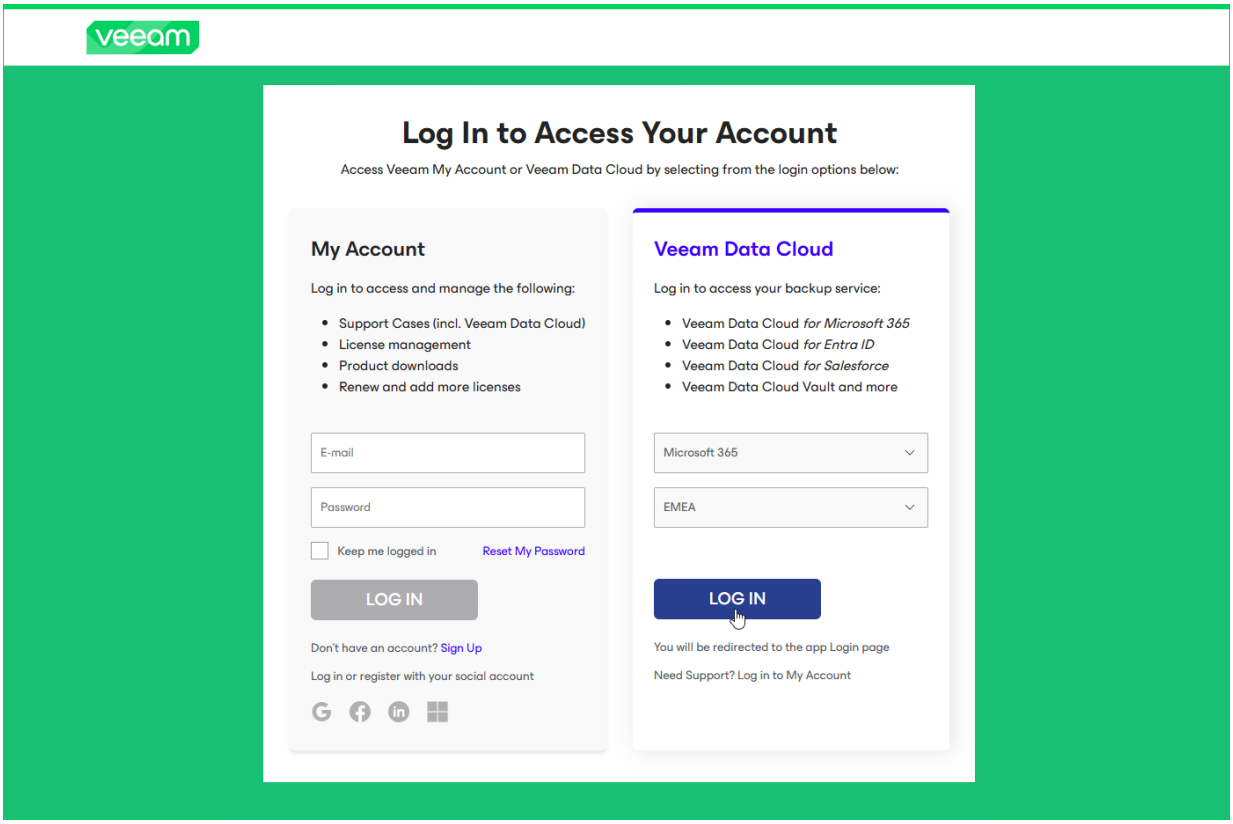

3. Specify or select a Microsoft 365 user account that you want to use to log in to Veeam Data Cloud for Microsoft 365.

   If you log in to the portal for the first time, the Veeam Data Cloud for Microsoft 365 application requests permissions to your Microsoft 365 account. The requested permissions are *profile — View users' basic profile* and *offline_access — Maintain access to data you have given it access to*. To start working with Veeam Data Cloud for Microsoft 365, accept this request.

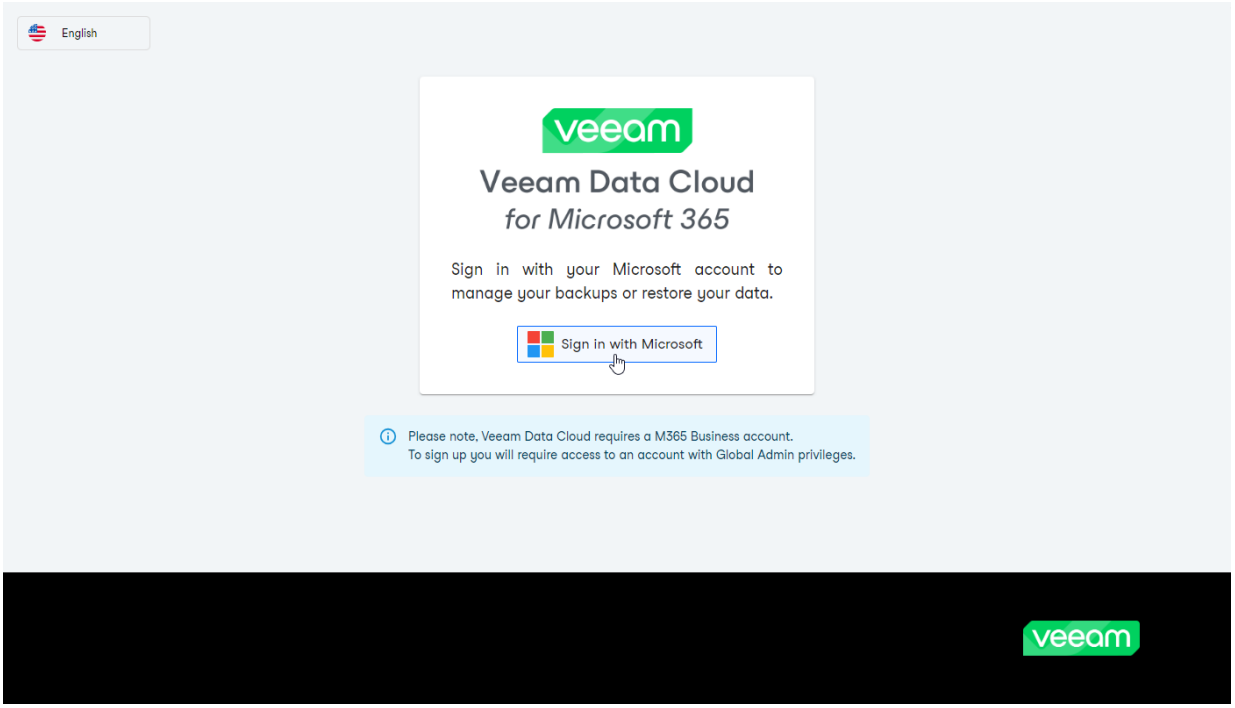
# Logging In with Log In to Veeam Portal

To log in to Veeam Data Cloud for Microsoft 365, do the following:

1. On the Log in to Veeam webpage, make sure that **Veeam Data Cloud** is selected.
2. From the **Product** drop-down list select *Microsoft 365*.
3. From the **Region** drop-down list select your current region (*AMER*, *EMEA* or *APJ*).
4. Click **Log In**. You will be redirected to the Veeam Data Cloud for Microsoft 365 portal.



5. On the Veeam Data Cloud for Microsoft 365 portal, click **Sign in with Microsoft**. You will be redirected to the Microsoft Entra authentication page.

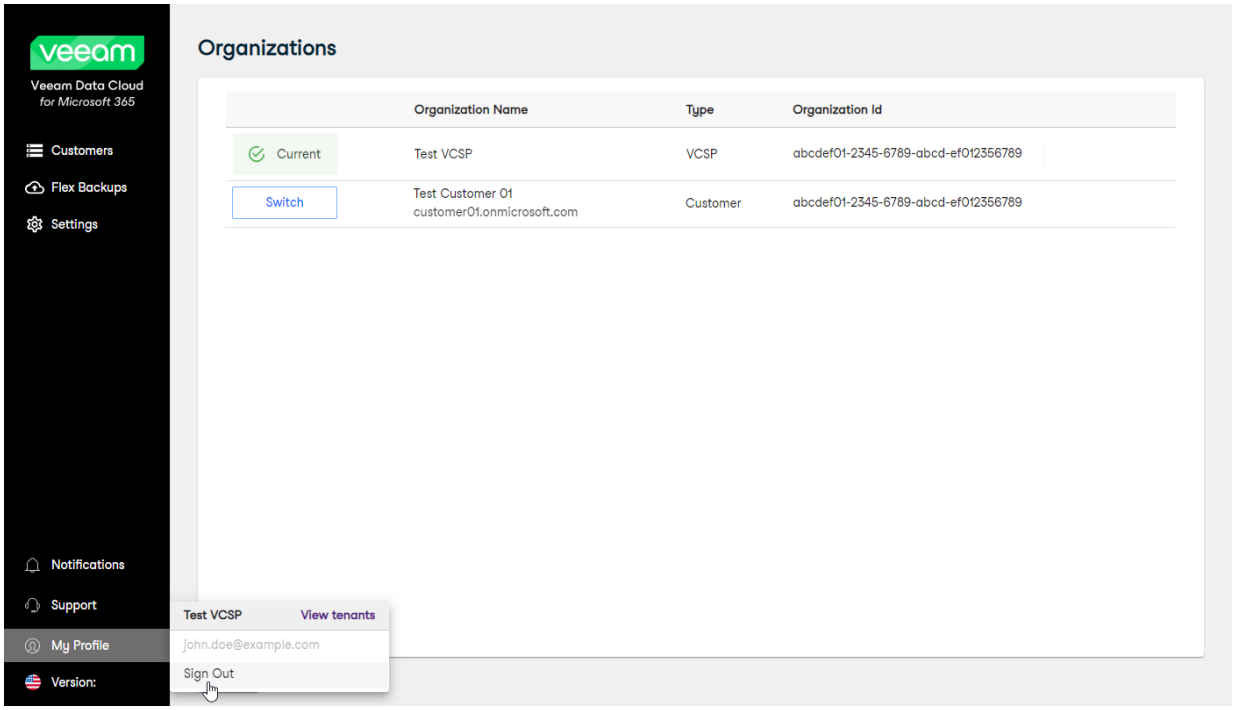



6. Specify or select a Microsoft 365 user account that you want to use to log in to Veeam Data Cloud for Microsoft 365.

   If you log in to the portal for the first time, the Veeam Data Cloud for Microsoft 365 application requests permissions to your Microsoft 365 account. The requested permissions are *profile — View users' basic profile* and *offline_access — Maintain access to data you have given it access to*. To start working with Veeam Data Cloud for Microsoft 365, accept this request.

# Logging Out

To log out, select **My Profile** on the left, then click **Sign Out**.



# Managing Customers

The portal provides a workspace where you can manage your customers. You can prepare accounts for customers in VCSP Pulse and use the portal to connect Veeam Data Cloud for Microsoft 365 to their Microsoft 365 tenant and set their properties. Alternatively, you can invite them to finish the onboarding process themselves. The portal displays the customers that have not been onboarded yet as pending.

After a customer is onboarded, you can review information about the customer, modify customer settings and manage licenses. The portal also allows you to export bulk data for further analysis and reporting.

## In This Section


- Creating Customers
- Onboarding Customers
- Viewing Customers
- Editing Customers
- Exporting Customers Data
- Adding Admin Users
- Offboarding Customers

# Creating Customers

To offer Microsoft 365 backup as a service using Veeam Data Cloud, the service provider must create customers in VCSP Pulse. To learn more about how to create customers and assign them a Veeam Data Cloud subscription, see the Creating Customers and Requesting Subscriptions sections of the Veeam Data Cloud Guide for Service Providers.

Once the customer is created and the subscription is assigned in VCSP Pulse, the service provider must complete the onboarding process in Veeam Data Cloud for Microsoft 365. For details, see Onboarding Customers.

# Assigning Roles in ProPartner Portal

Service providers must create Veeam Data Cloud customers in VCSP Pulse. Before you start creating customers in VCSP Pulse, make sure that the account of the ProPartner employee you use to log in to VCSP Pulse has the *VCSP Pulse Full Access* role assigned.

To check and adjust the roles of a ProPartner employee, do the following:

1. Log in to the ProPartner portal using the account that has the ProPartner Manager role assigned.
2. Click the user name in the upper-left corner.
3. On the **Partner Profile** page, select the **Portal users** tab.
4. In the **Registered employees** list, click the name of the employee whose roles you want to adjust.
5. In the **Employee details** window, make sure the **VCSP Pulse Roles** checkbox and the *Full Access* option are selected.
6. Click **Save**.

# Onboarding Customers

After you create a customer in VCSP Pulse, the portal displays this customer as pending. You can onboard pending customers and connect Veeam Data Cloud for Microsoft 365 to their Microsoft 365 tenant. Alternatively, you can invite your customers to finish the onboarding process themselves.

## In This Section


- Managed Onboarding
- Self-Service Onboarding

# Managed Onboarding

You can onboard a pending customer and connect Veeam Data Cloud for Microsoft 365 to a Microsoft 365 tenant of the customer.

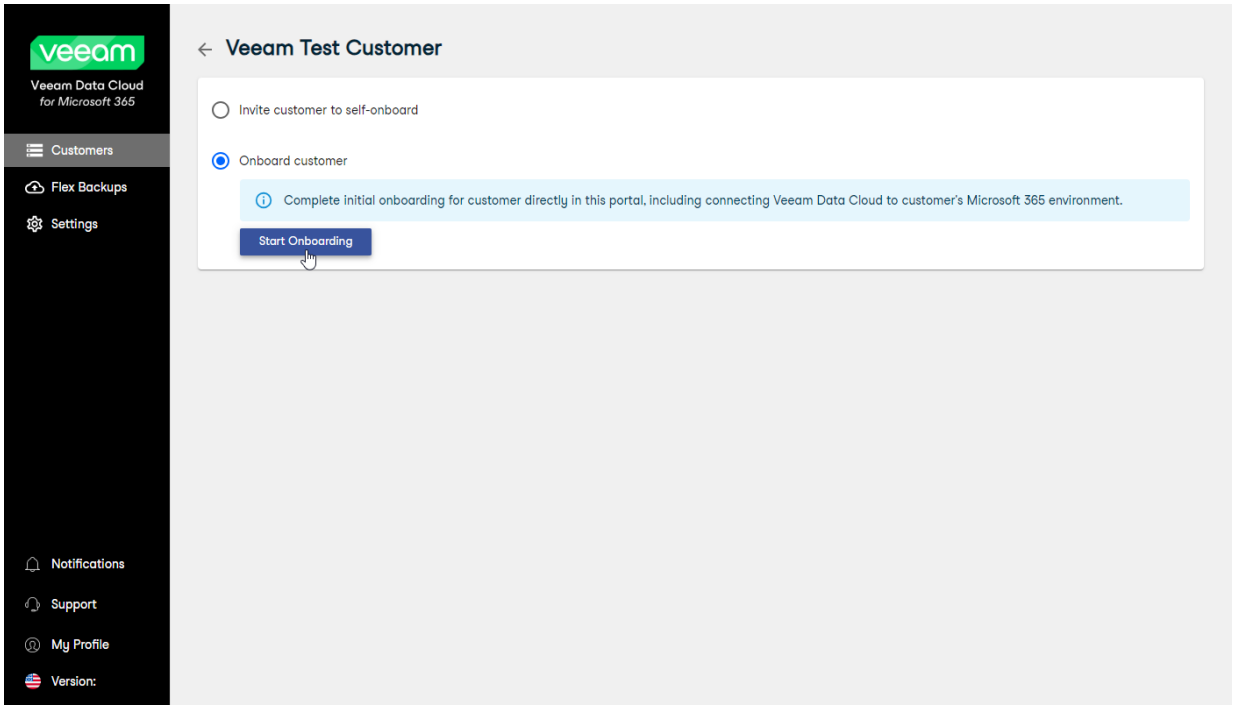
To onboard a customer, use the **Onboarding** wizard:

1. Launch the Onboarding wizard.
2. Confirm the legal agreement.
3. Connect the tenant to the Flex backup service.
4. Finish working with the Onboarding wizard.

# Step 1. Launch Onboarding Wizard

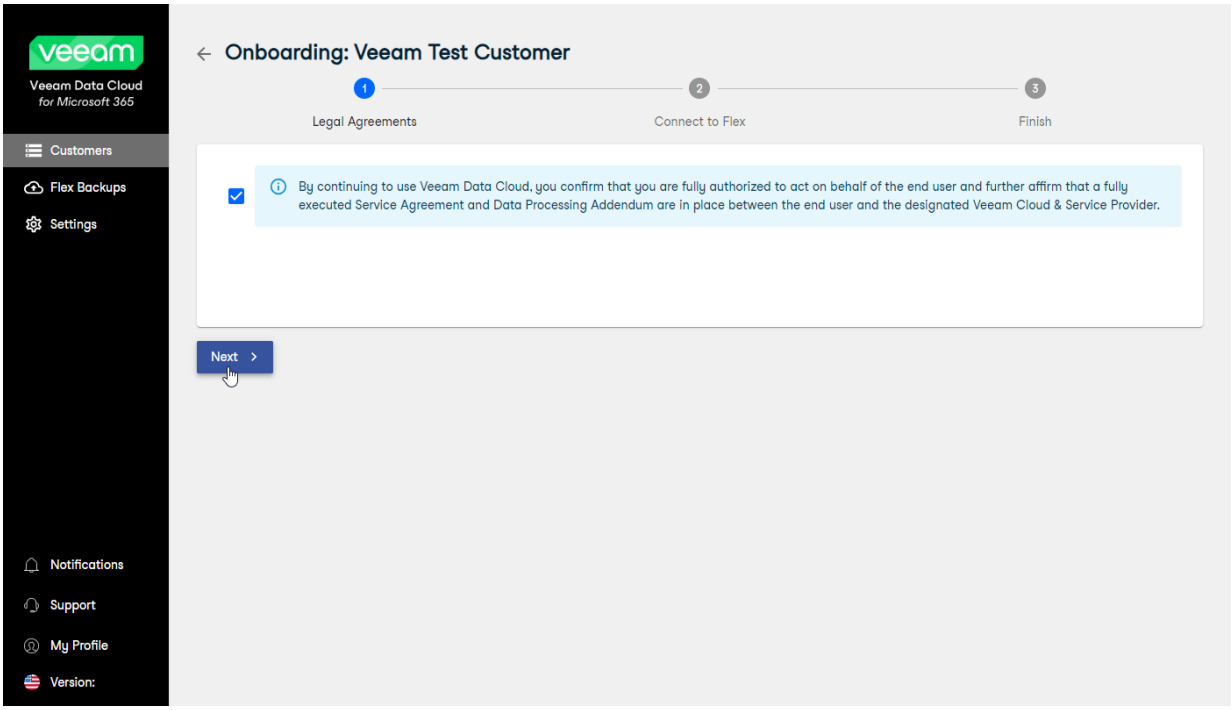
To launch the **Onboarding** wizard, do the following steps:

1. Select **Customers** on the left.
2. Click the name of a pending customer in the list. Alternatively, in the **Actions** column, click the **Onboarding** button.
3. Select **Onboard customer**.
4. Click **Start Onboarding**.



# Step 2. Confirm Legal Agreement

At the **Legal Agreements** step of the wizard, select the check box to confirm that the necessary legal relationships between your organization and your customer are contractually agreed.



# Step 3. Connect Tenant to Flex

At the **Connect to Flex** step of the wizard, specify Flex backup options and log in to a Microsoft 365 tenant using a device code.

During the process Veeam Data Cloud for Microsoft 365 creates a Microsoft Entra application. It is recommended to let Veeam Data Cloud for Microsoft 365 create the application automatically. However, you can create the application manually. For details, see the Microsoft Entra Application Permissions section of Veeam Data Cloud for Microsoft 365 User Guide.

To log in to a Microsoft 365 tenant of the customer, do the following:

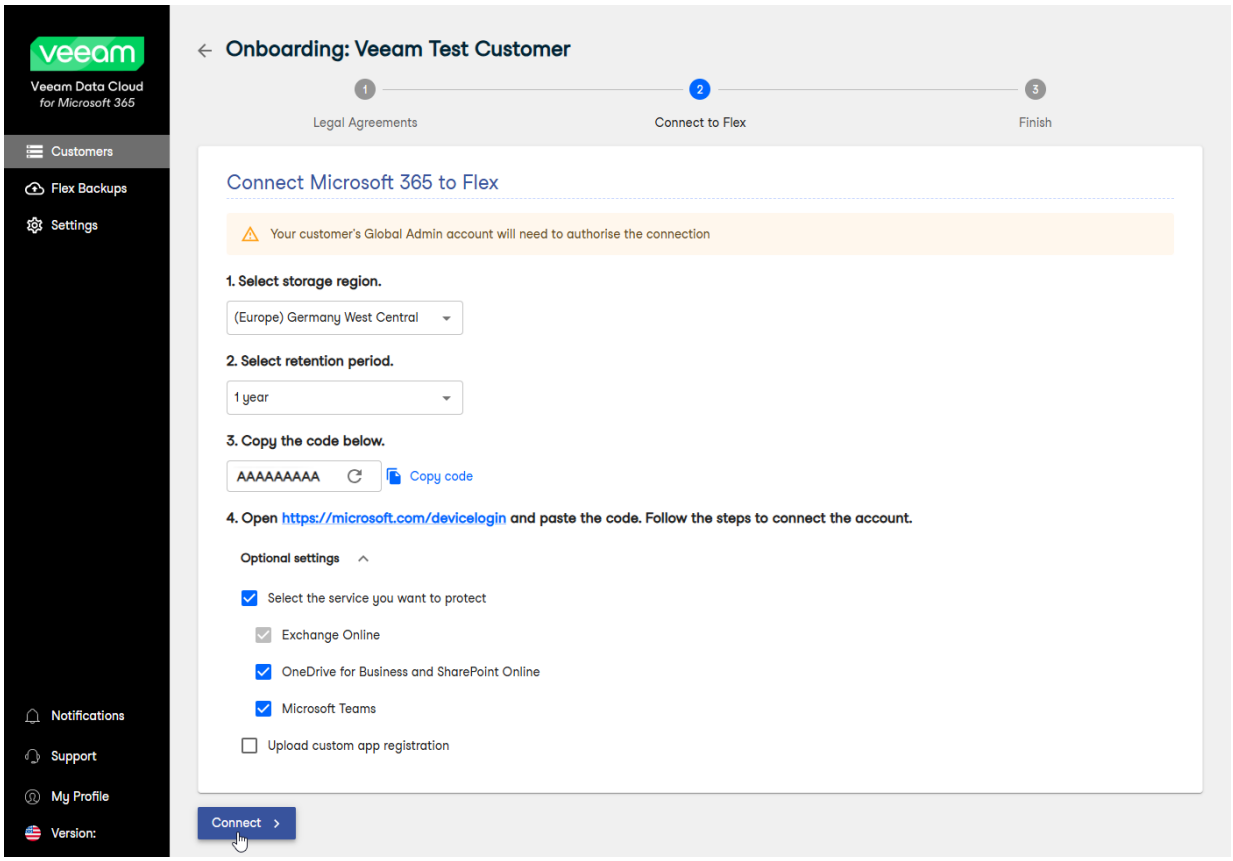
1. From the **Select storage region** drop-down list, select a region where you want to store backed up data.
2. From the **Select retention period** drop-down list, select a period for which Veeam Data Cloud will keep backups before they are deleted.
3. Copy the device code.

   To keep the process secure, you may need to share the device code with the customer and ask them to sign in to the Microsoft Identity platform as described in steps 3 and 4.
4. Open the https://microsoft.com/devicelogin link in a new tab of your browser.
5. On the **Sign in to your account** webpage, paste the code that you copied and log in to the Microsoft Identity platform.

   Make sure to log in with the user account that has the Global Administrator role. For more information about this role, see this Microsoft article.
6. Return to the **Onboarding** wizard.
7. [Optional] Select services that you want to back up.

   Make sure to select only the services that are available in the Microsoft 365 tenant that you are connecting to.

8. Click **Connect**.



# Step 4. Finish Working with Onboarding Wizard

At the **Finish** step of the wizard, choose how backup policies will be created:

> **NOTE**
>
> Before you select whether Veeam Data Cloud automatically configures backup policies or lets you manually create the policies after onboarding, make sure you have secured the following:
>
> - The customer is familiar with the Veeam Data Cloud services licensing model.
> - You have discussed with your customer which tenant users and services, for example, Teams or SharePoint, should be protected with Veeam Data Cloud.
> - You have reached an agreement on the resources to be included in the backup.

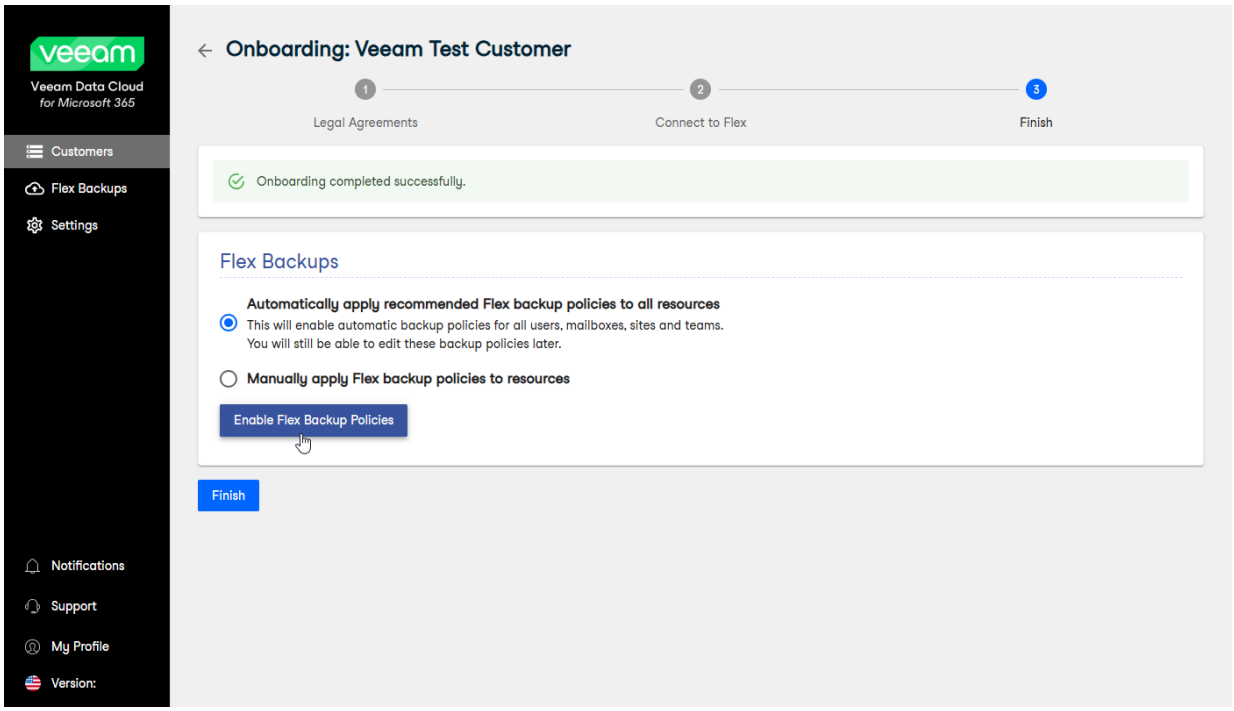
- Select **Automatically apply recommended Flex backup policies to all resources** to let Veeam Data Cloud for Microsoft 365 create backup policies automatically. Then, do the following:

  a. Click **Enable Flex Backup Policies**. The Veeam Data Cloud for Microsoft 365 starts to prepare the backup policies.

  b. After the backup polices are ready, click **Finish**.

- Select **Manually apply Flex backup policies to resources**. Then, click **Create Flex Backup Policies**.

  The portal opens the **Create new Backup policy** wizard. To complete the wizard, follow the instructions in the Creating Flex Backup Policies section of the Veeam Data Cloud for Microsoft 365 User Guide.

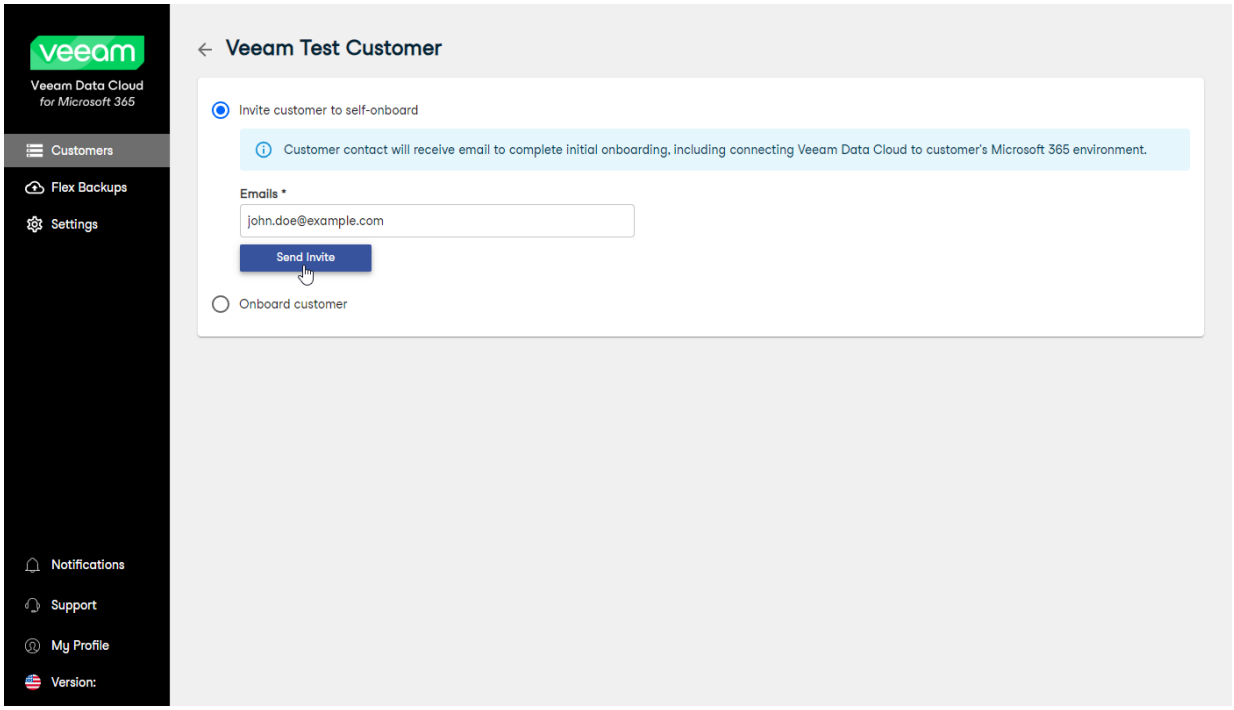


# Self-Service Onboarding

You can invite pending customers to finish the onboarding process themselves. Customers will receive an email with an invitation link that allows them to sign up to Veeam Data Cloud for Microsoft 365 and connect Veeam Data Cloud for Microsoft 365 to their Microsoft 365 tenant. For details, see the Self-Service Onboarding section of the Veeam Data Cloud for Microsoft 365 User Guide.

To invite a pending customer, do the following steps:

1. Select **Customers** on the left.
2. Click the name of a pending customer in the list. Alternatively, in the **Actions** column, click the **Onboarding** button.
3. Make sure that **Invite customer to self-onboard** is selected. The portal displays a list of email addresses to which you have already sent the invite.
4. In the **Emails** field specify email addresses to which you want to send the invite. The email addresses must separated by comma or space.
5. Click **Send Invite** if you are inviting the customer for the first time. Click **Resend Invite** if you are inviting the customer again.



# Viewing Customers

In the **Customers** section, you can view the list of your customers.

To adjust the displayed columns, click **Columns** at the top right of the list.

To quickly find specific customers, you can apply multiple filters:

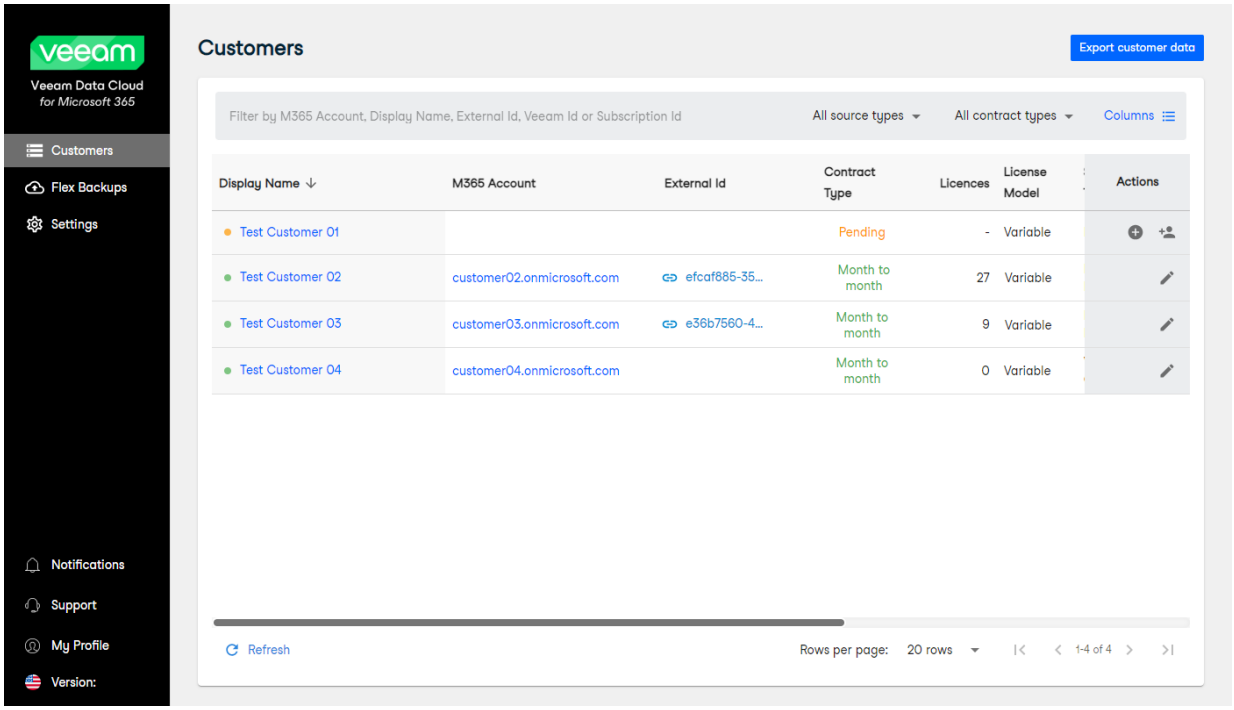
- To filter customers, start typing the text in the search field at the top of the list. The search checks the following customer properties:
  - Display name
  - Microsoft 365 account
  - External ID
  - Veeam account ID
  - Flex, Express or Premium subscription ID
- To display customers with a specific source of onboarding, click **All source types** and select a source type.
- To display customers with specific contract types or statuses, click **All contract types** and select one or multiple options.

To view detailed information about a customer, click the customer display name. For details, see Editing Customers.

For each customer, the portal displays the following information:

| Property | Description |
|---|---|
| **Display Name** | Name of the customer that helps you to identify the customer in the portal. |
| **M365 Account** | Domain name of Microsoft 365 tenant that the customer used to sign up to Veeam Data Cloud for Microsoft 365. |
| **External Id** | Unique subscription ID of the customer in the marketplace from which the customer joined the platform. For example, CloudBlue subscription Id or Microsoft Marketplace subscription Id. |
| **Contract Type** | Actual status of the customer or customer contract. |
| **Licences** | Number of licenses that the customer uses. |
| **License Model** | License model that the customer uses. |
| **Source Type** | Sales channel through which the customer was added. |
| **Activation Date** | Date and time when the customer was onboarded. |

| Property | Description |
| --- | --- |
| **Storage Consumed (GB)** | Amount of storage that is used by backups of customer data. |
| **Backed Up Accounts** | Number of Microsoft 365 accounts in the customer tenant that are protected by Veeam Data Cloud for Microsoft 365. |
| **Total Active Accounts** | Number of licensed accounts that are in the Microsoft 365 tenant of the customer. |
| **Total User Change (per moth)** | Difference in the number of licensed Microsoft 365 accounts in the customer tenant this month and the previous month. |



# Editing Customers

You can view details and statistics of a customer and modify customer settings.

To edit a customer, select **Customers** on the left, then click the name of a customer in the list. Alternatively, in the **Actions** column, click the **Edit** button.

The following steps apply only to customers that are not in the pending status.

The customer page is organized into several tabs where you can review information about the customer, modify customer settings and review licenses.

## Information

On the **Information** tab, you can edit the following settings:

- In the upper part of the **Settings** section, you can review display name and Microsoft 365 tenant information and specify a region where you want to store backed-up data.
- In the lower part of the **Settings** section, you can manage optional features for the customer account.
  - Select **Enable self service** to allow users of the customer Microsoft 365 tenant to log in to the customer portal and perform self-service restore of their Outlook emails and OneDrive files.
  - Select **Create / Delete policy** to allow the customer to create new backup policies and delete them.
  - Select **Edit / Trigger policy** to allow the customer to edit existing backup policies and start backup jobs.
  - Select **Auto Create Backup Policies** to allow Veeam Data Cloud for Microsoft 365 to automatically create backup policies when the customer onboards. For details, see the Self-Service Onboarding section of the Veeam Data Cloud for Microsoft 365 User Guide.
  - Select **Allow multiple regions** to allow the customer to create backup repositories in multiple regions.

    If you enable this option, the **Settings** > **System** > **Backup Repositories** page will be visible in the customer portal, and the customer will be allowed to create new backup repositories in supported regions.
  - Select **Enable email previews** to allow customers to view the email body of backed-up emails.

    If you disable this option, the *Preview Emails* permission will be hidden in the customer portal, and customer users will not be able to view the email body of backed-up emails. For details, see the Managing User Roles section of the Veeam Data Cloud for Microsoft 365 User Guide.
- In the **Information** section, you can review basic account settings and the history of account and license activation.
- In the **Networking** section, you can restrict customer portal access to specific IP ranges. This will increase security. To restrict access, do the following:
  a. Click **Add IP Range** and specify the starting and ending IP addresses of the range. You can add multiple ranges.
  b. Select **Restrict Veeam Data Cloud access to specific IP ranges** to apply your settings.

     Your settings are merged with the settings that the customer specifies in the customer portal. The IP ranges that the customer adds are also displayed in this section.

# Notifications

On the **Notifications** tab, you can configure notifications settings that enable you and your customers to receive notifications about backups, restores, and license changes from the customer portal.

- Select **Allow system notifications**, to allow your customers to receive notifications and specify the notification settings. If you disable this option, the **Settings** > **System** > **Notifications** page will be hidden in the customer portal, and the customer will not receive notifications.
- From the **Default language for notifications** drop-down list, select a language in which you want to receive notifications.
- To add an email address for notifications, click **Add Email**.

  If you want to receive notifications for monitoring and support, specify your email. The customer can modify this setting if the **Allow system notifications** option is enabled.
- To add a Teams channel for notifications, click **Add Teams channel** and specify the Teams channel incoming webhook URL. For details, see this Microsoft article.

  If you want to receive notifications for monitoring and support, specify your Teams channel. The customer can modify this setting if the **Allow system notifications** option is enabled.
- After you add a contact for notifications, you can specify notification topics that the contact will receive.
- To remove a contact for notifications, click the **Delete** button in the **Actions** column.

The portal also allows you to specify the default settings for new customers. For details, see Managing System Notifications.

# Backup Policies

On the **Backup policies** tab, you can review backup policies that are created for the customer. To create and manage Flex backup policies, click **Manage Flex Backup Policies**. For details, see Performing Backup.

# Billing

On the **Billing** tab, you can review customer licenses.

- In the **Licence Model** section, you can review the current license model that the customer uses.
- In the **VDC Subscriptions** section, you can review which Veeam Data Cloud for Microsoft 365 plans the customer uses. Service providers can only sell the Flex plan. For details on plans, see the Plans section of the Veeam Data Cloud for Microsoft 365 User Guide.
- In the **Licensed Users** section, you can review the history of consumed Veeam Data Cloud for Microsoft 365 licenses.

# Admin Users

On the **Admin Users** tab, you can view a list of users that are added to the customer account.

Veeam Data Cloud for Microsoft 365 supports the following methods to add an admin user:

- Your Microsoft 365 account is automatically added to your customers as an admin user if you specify it as *VDC Primary Administrator* in VCSP Pulse. For details, see Creating Customers.

- You can add your Microsoft 365 account to a pending customer in Veeam Data Cloud for Microsoft 365. For details, see Adding Admin Users.
- After onboarding, your customers can add your Microsoft 365 account through the customer portal. For details, see the Adding Admin Accounts section of the Veeam Data Cloud for Microsoft 365 User Guide.

# Licenced Users

On the **Licenced Users** tab, you can review Microsoft 365 users that are backed up and consume Veeam Data Cloud for Microsoft 365 licenses. The page also displays the data protection status for each user.

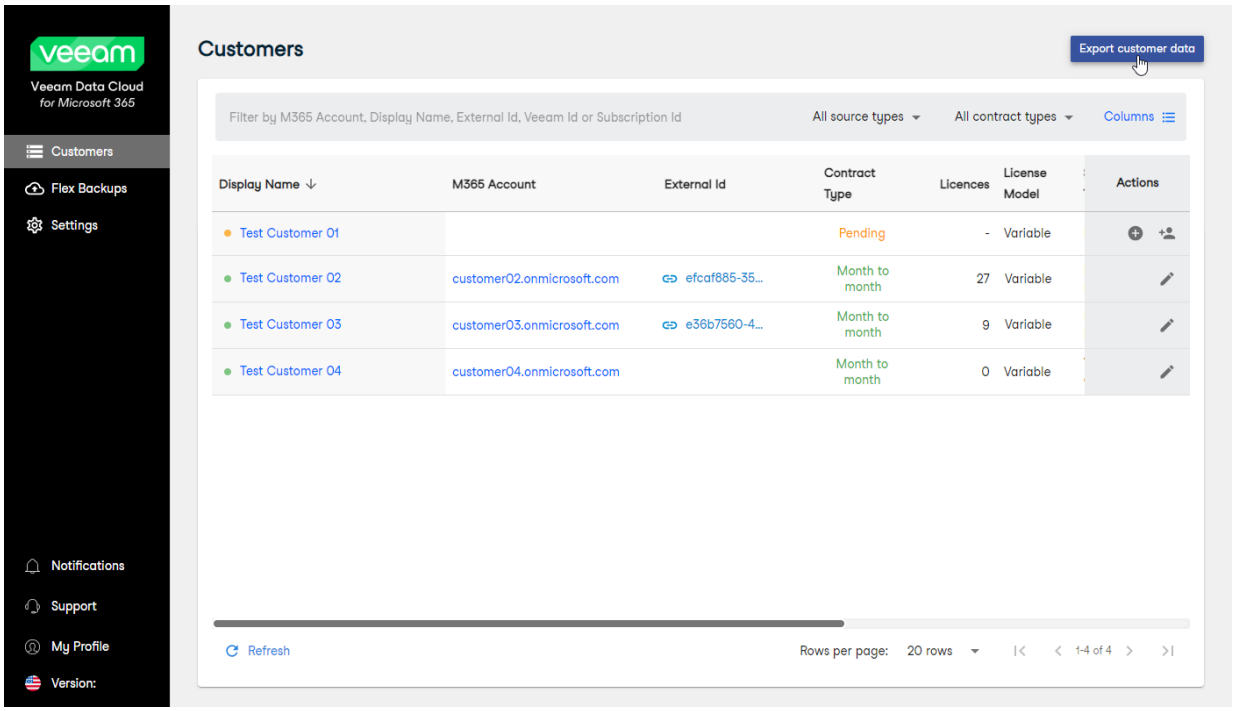
To download the list of users in the CSV format, click **Export to CSV**.

# Exporting Customers Data

The portal allows you to export customer data to a CSV file for further analysis and reporting. The file contains data of all your customers.

To export customer data, do the following:

1. Select **Customers** on the left.
2. Click **Export customer data** to download the file.



# Adding Admin Users

You can add users with administrator privileges to a pending customer. After the customer is onboarded, these users can log in to the customer portal.

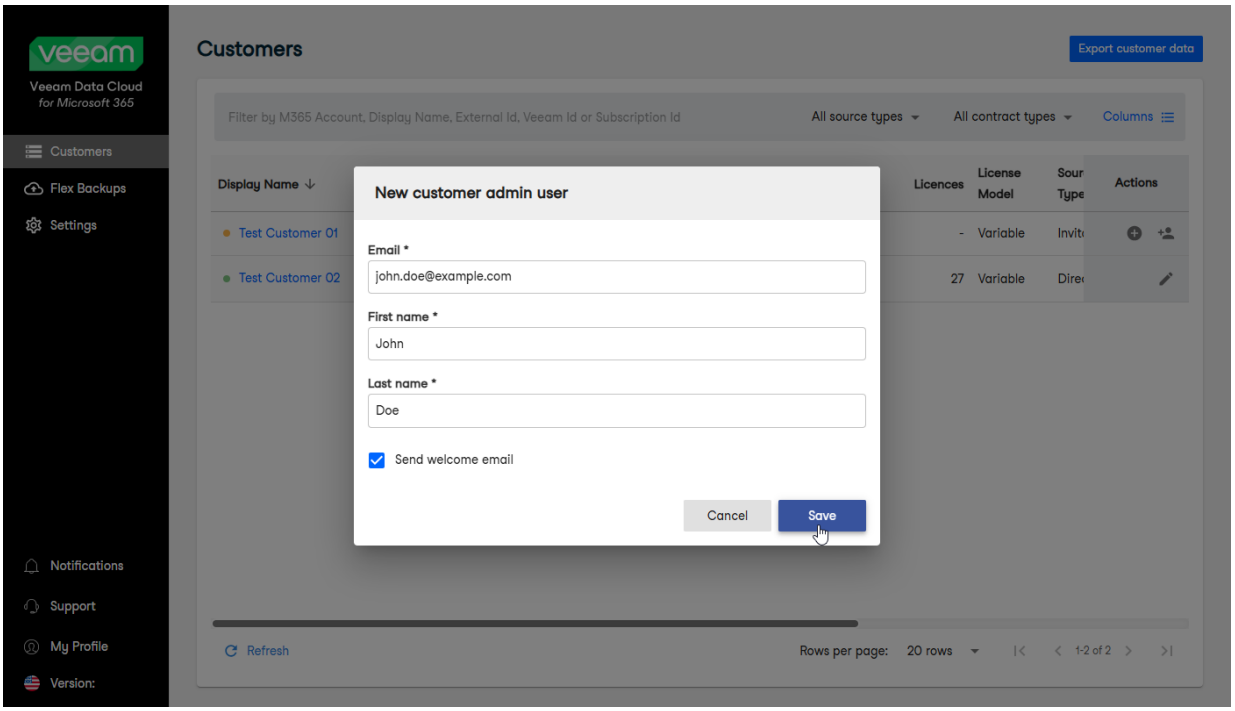
If you add your Microsoft 365 account, which you use to log in to the portal, to a pending customer, you will be able to work in the customer portal on behalf of the customer. For details, see Switching to Customer Portal.

To add an admin user, do the following:

1. Select **Customers** on the left.
2. In the **Actions** column, click the **Add admin** button next to the pending customer for which you want to add an admin user.
3. In the **New customer admin user** window, specify a Microsoft 365 email address, the first name and last name of the user. Clear the **Send welcome email** check box if you do not want the user to receive an email with an invitation link to Veeam Data Cloud.

   > **IMPORTANT**
   > - The email address must be a UPN (User Principal Name) account. You must not use alias addresses. For more information on UPN, see this Microsoft article.
   > - The email address must not be a group address.

4. Click **Save**.



# Offboarding Customers

If you registered or onboarded a customer incorrectly, or the customer no longer wants to use Veeam Data Cloud, you can request that the Veeam Customer Support team delete the customer from VCSP Pulse and Veeam Data Cloud.

After you submit your request, the Veeam Customer Support team will review it and may ask you for additional information during the review. Once your request is approved, the Veeam Customer Support team will delete the customer. You can register and onboard the deleted customer again if it is necessary.

> **NOTE**
>
> Veeam Data Cloud usage for the month in which the customer was deleted must be reported appropriately and billed. For more information on usage reporting, see Monthly Usage Reporting.

To delete a customer, do the following:

1. Log in to My Account at https://my.veeam.com.
2. Select **Support** > **Open a case**.
3. In the **Choose case type** section, select **General Inquiry**.
4. From the **I have problems with** drop-down list, select *VCSP Pulse.*
5. In the request summary, enter *Delete Customer in VDC M365.*
6. In the request details, specify the following:
   - The customer display name. You can find the customer display name in the **Customers** section. For details, see Viewing Customers.
   - The customer subscription ID (if available).
   - The date when you want the customer to be deleted.
   - The number of user licenses that the customer uses.
7. Complete and submit the request form.

# Performing Backup

The portal allows you to create and manage backup policies for your customers.

Creating the first backup policy for a customer and managing policies is available only for users with the *Backup Management* permission assigned. Creating additional backup policies is available only for users with the *Advanced Backup Management* permission assigned. For details, see Managing Roles.

## In This Section

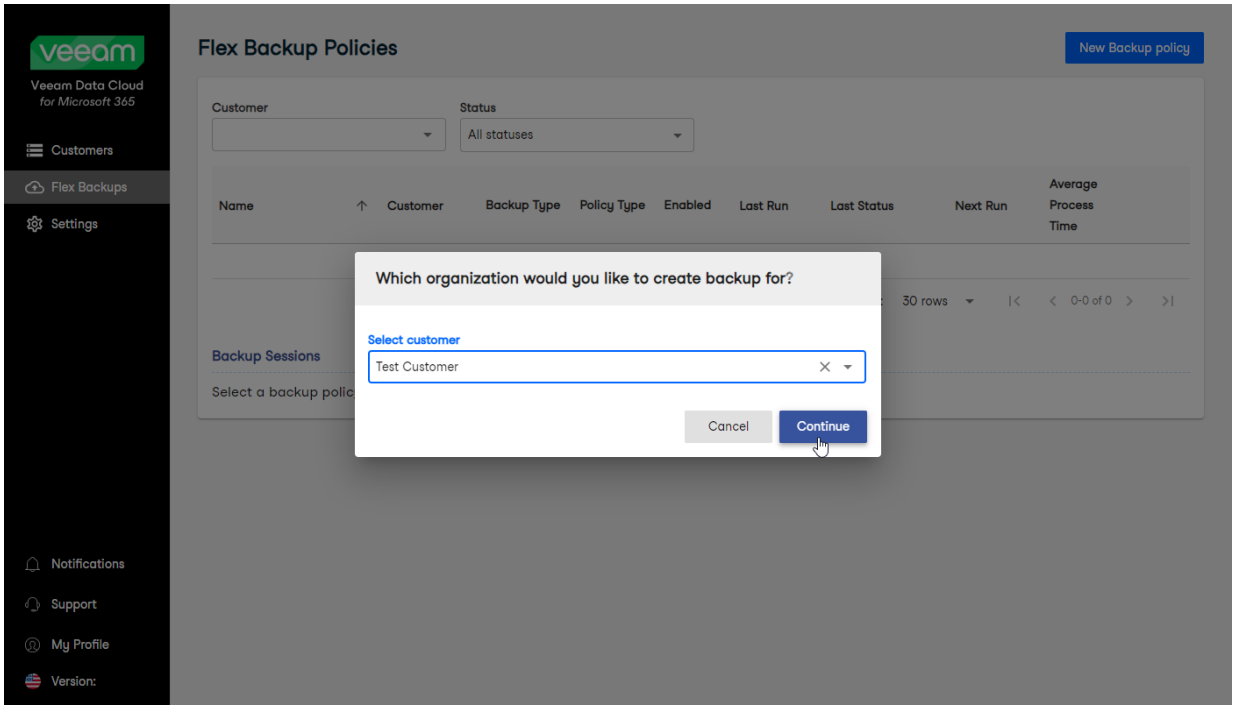
- Creating Flex Backup Policies
- Editing Flex Backup Policies
- Viewing Backup Logs
- Performing Backup Policy Actions
- Supporting Self-Service Backups

# Creating Flex Backup Policies

You can create Flex backup policies for your customers.

To create a Flex backup policy for a customer, do the following:

1. Select **Flex Backups** on the left.
2. Click **New Backup Policy**.
3. In the **Which organization would you like to create backup for?** window, select a customer and click **Continue**.
4. The portal opens the **Create new Backup policy** wizard. To complete the wizard, follow the instructions in the Creating Flex Backup Policies section of the Veeam Data Cloud for Microsoft 365 User Guide.



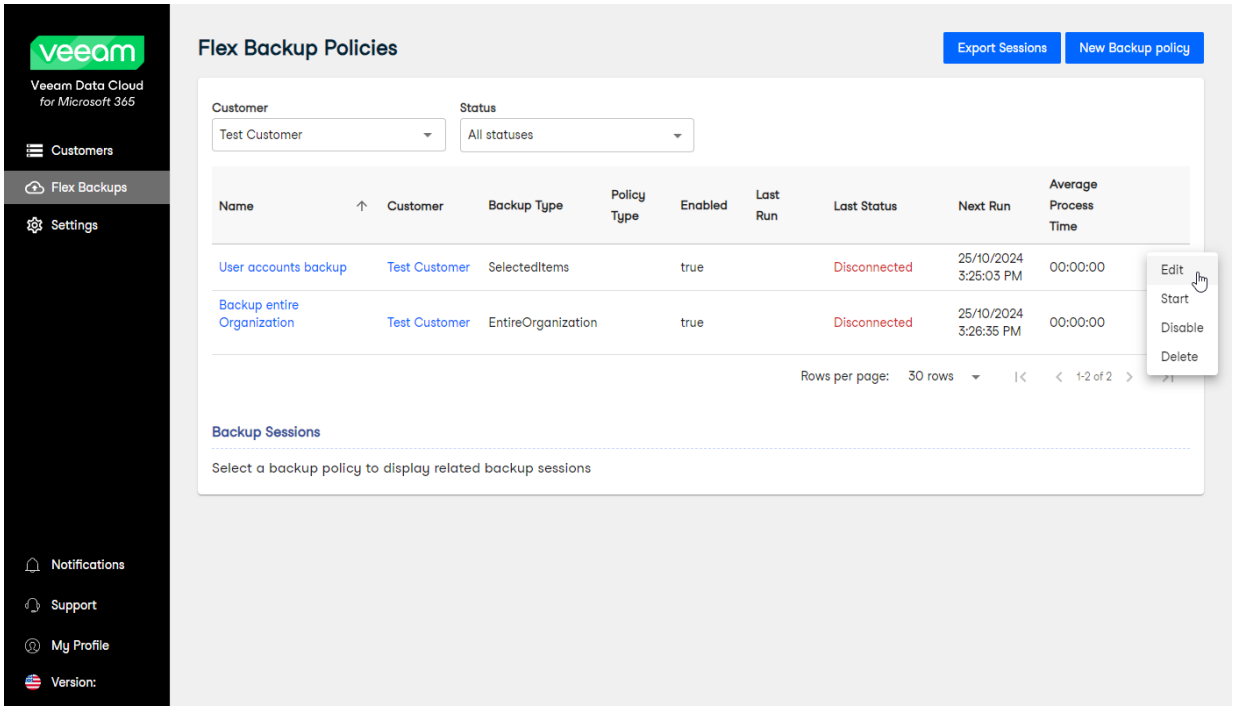
# Editing Flex Backup Policies

You may need to edit a Flex backup policy to add or remove backed-up objects.

> **NOTE**
>
> By default, backup policies run every 24 hours. To change the schedule, log in to My Account at https://my.veeam.com and open a support case.

To edit a Flex backup policy, do the following:

1. Select **Flex Backups** on the left.
2. In the **Customer** field, select a customer. To quickly find a customer with a specific name, start typing the name in the field.
3. In the list of policies, click the menu on the right of the policy that you want to edit and select **Edit**.
4. The portal opens the window where you can edit the policy. To complete editing of the policy, follow the instructions in the Variable License Model part of the Editing Flex Backup Policies section of the Veeam Data Cloud for Microsoft 365 User Guide.



# Viewing Backup Logs

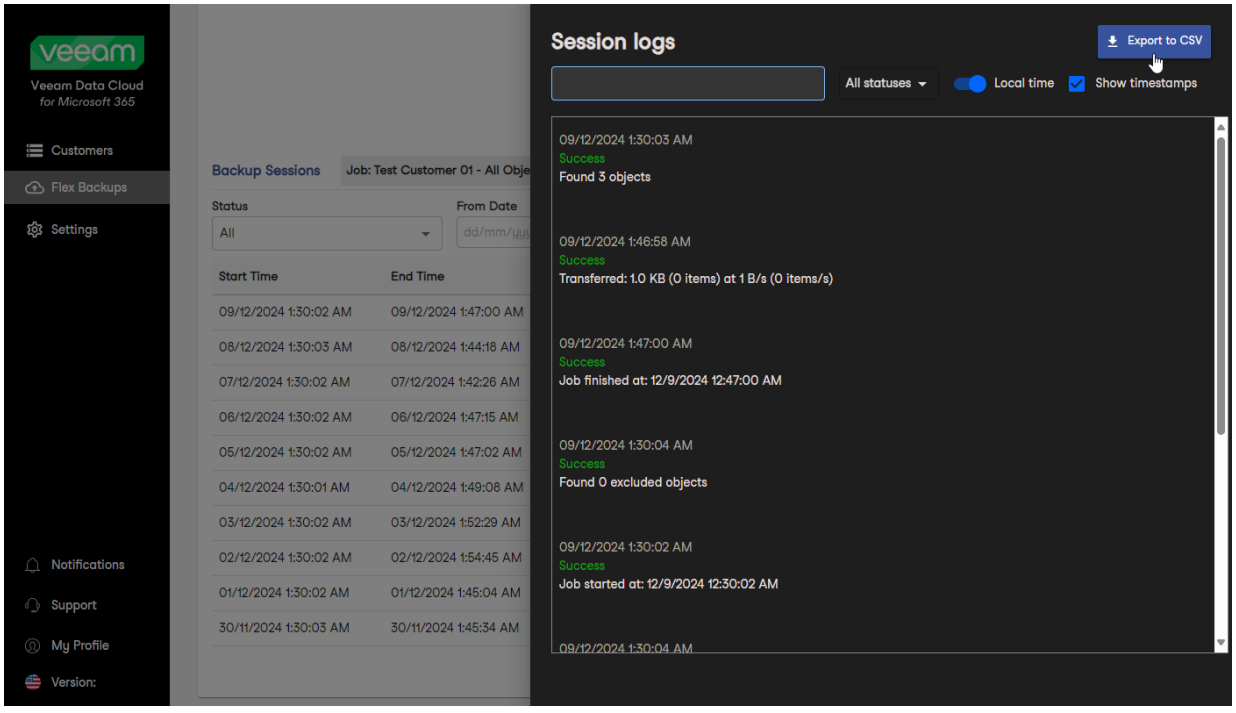
To monitor or troubleshoot the backup activity of a specific backup policy, you can review the list of started policy sessions. For deeper analysis, you can also check session logs and download them in the CSV format. Each log record contains a timestamp, event status and message.

## Viewing Backup Sessions

To view a list of sessions related to a specific backup policy, do the following:

1. Select **Flex Backups** on the left.
2. In the **Customer** field, select a customer. To quickly find a customer with a specific name, start typing the name in the field.
3. Click the name of a policy that you want to view.
4. In the **Backup Session** section, the portal displays the list of backup sessions that were started using the selected policy.
5. In the list of backup sessions, you can do the following:
   - Click the **View logs** button on the right of the session to display backup logs.
   - Click the **Download logs** button on the right of the session to download the file with backup logs.

For more information on how to work with backup logs, see the Viewing Backup Logs section of the Veeam Data Cloud for Microsoft 365 User Guide.

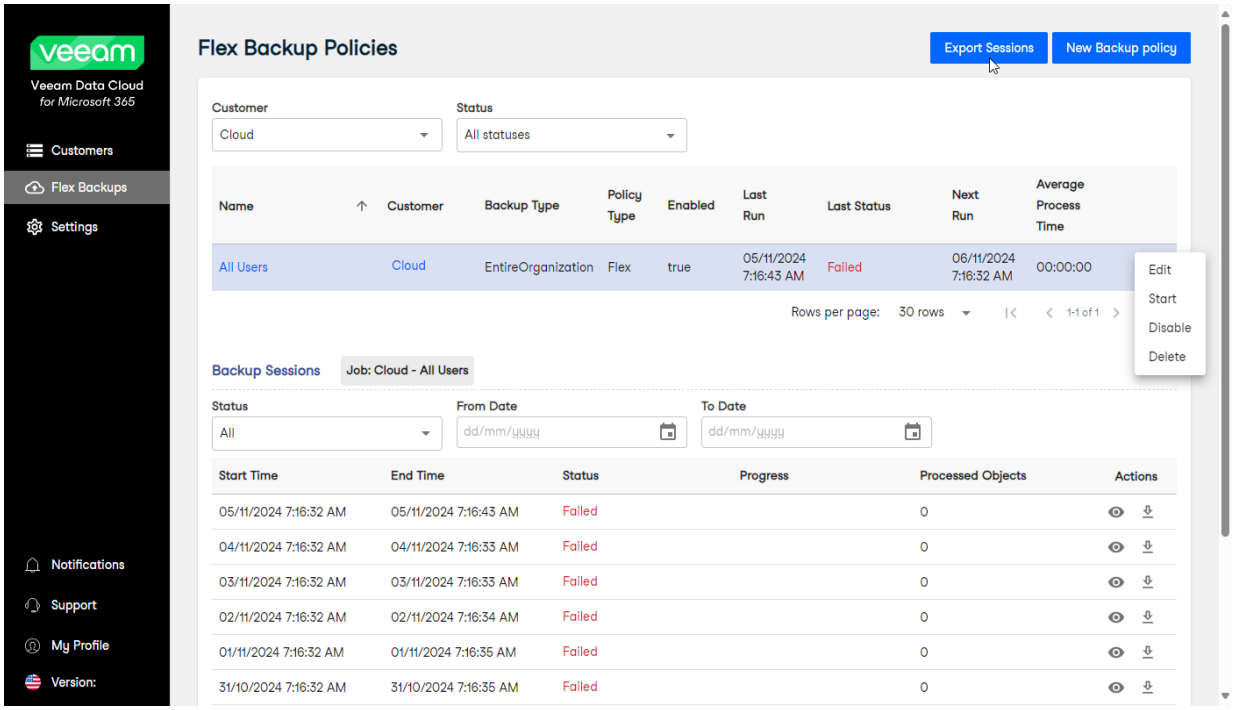



## Exporting Backup Sessions

The portal allows you to export backup session logs to a CSV file for further analysis and reporting. The file is compressed in the ZIP format.

To export a list of backup sessions, do the following:

1. Select **Flex Backups** on the left.
2. In the **Customer** field, select a customer. To quickly find a customer with a specific name, start typing the name in the field.
3. Click **Export Sessions**.
4. In the **Select Month** window, select the month for which you want to export data.
5. Click **Export** to download the file.

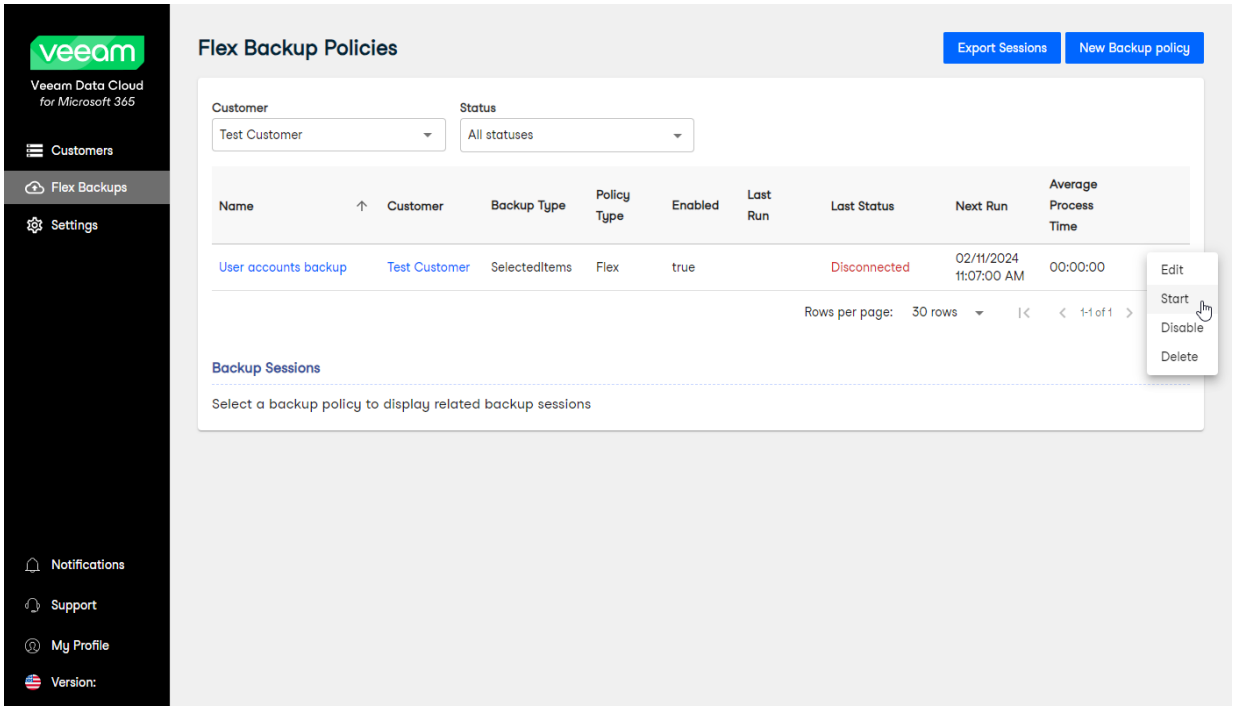


# Performing Backup Policy Actions

You can use actions from the backup policy menu to manage backup policies.

To open the menu of a backup policy, do the following:

1. Select **Flex Backups** on the left.
2. In the **Customer** field, select a customer. To quickly find a customer with a specific name, start typing the name in the field.
3. In the list of policies, click the menu on the right of the policy for which you want to perform an action and do one of the following:
   - Select **Edit** to add or remove backed-up objects. For details, see Editing Flex Backup Policies.
   - Select **Start** to run a backup. Select **Stop** to stop a backup that is already running.
   - Select **Disable** to prevent the policy from starting scheduled jobs. Then, confirm the policy disabling. Select **Enable** to allow the schedule again.
   - Select **Delete** to delete the policy. Then, confirm the deletion of the policy.



# Supporting Self-Service Backups

You can allow your customers to configure and manage backup policies themselves. For details, see Editing Customers. If you do so, the customers may require your support to create and manage policies successfully. For more information on how to work with backup policies in the customer portal, see the Performing Backup section of the Veeam Data Cloud for Microsoft 365 User Guide.

# Performing Restore

The portal enables you to restore the backed-up data of your customers. You can also navigate your customers if they want to initiate restores themselves.

## In This Section


- Managed Data Restore
- Self-Service Data Restore

# Managed Data Restore

Veeam Data Cloud for Microsoft 365 allows you to restore the backed-up data of your customers. To restore data, switch to the customer portal. For details, see Switching to Customer Portal. For more information on how to work with restores in the customer portal, see the Performing Restore section of the Veeam Data Cloud for Microsoft 365 User Guide.

# Self-Service Data Restore

Your customers can perform a restore operation themselves and may require your support to complete the restore process successfully. For more information on how to work with restores in the customer portal, see the Performing Restore section of the Veeam Data Cloud for Microsoft 365 User Guide.

# Viewing Dashboard

The Veeam Data Cloud for Microsoft 365 dashboard contains built-in widgets that provide information on the state of customer backups, restores and licenses.

The dashboard is the landing page every time you log in. For details, see Accessing Veeam Data Cloud for Microsoft 365. To return to the portal dashboard from a different page, click the logo in the upper-left corner.

## Dashboard Widgets

The following widgets are available on the dashboard:

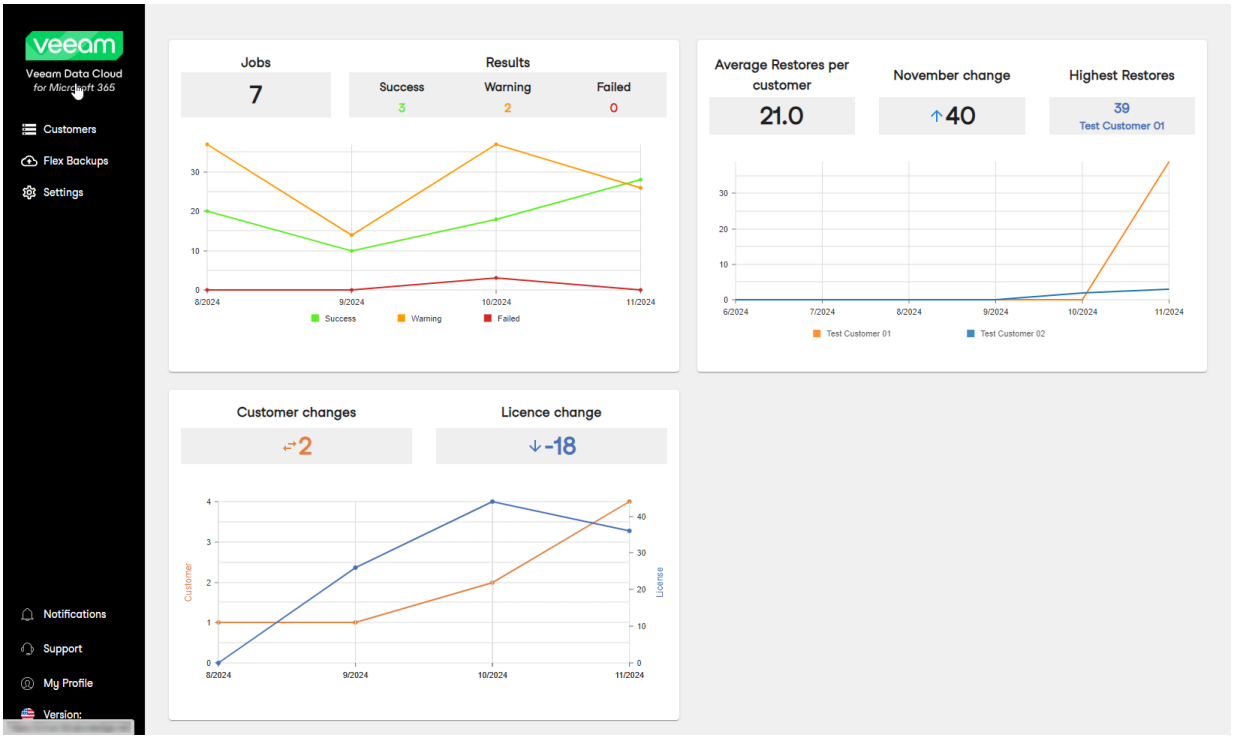
- The job results widget provides information about the following metrics:
  - *Jobs* — the number of backup jobs related to your reseller account.
  - *Results* — the number of jobs with a specific recent result (*Success*, *Warning*, *Failed*).

  The graph displays a history of job results.
- The restore statistic widget provides information about the following metrics:
  - *Average Restores per customer* — the average number of requested restores per customer.
  - *Change* — the difference in the number of restores this month and the previous month.
  - *Highest Restores* — the name of the customer with the highest number of restore requests and the number of restores requested by this customer in the current month.

  The graph displays a history of the number of restores per customer.
- The license usage widget provides information about the following metrics:
  - *Customer changes* — the difference in the number of customers this month and the previous month.

- *Licence change* — the difference in the number of licenses this month and the previous month.

The graph displays a history of the number of customers and licenses.



# Monthly Usage Reporting

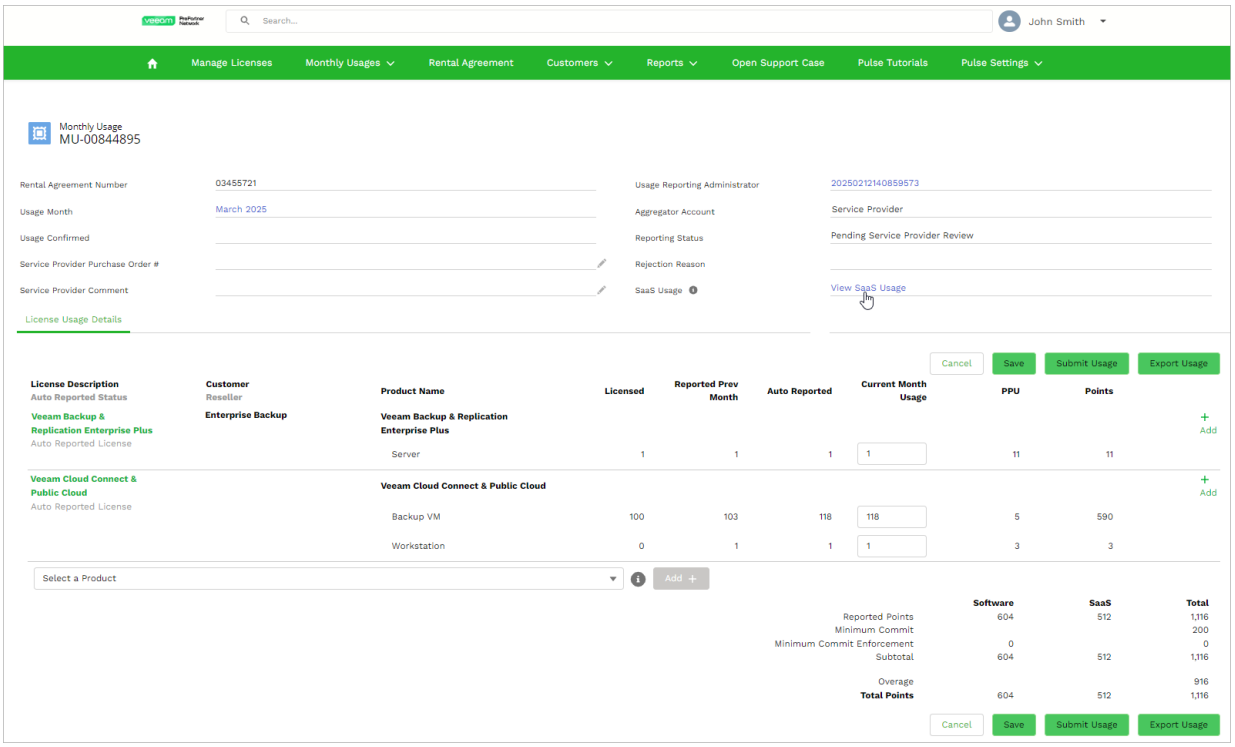
Information on Veeam Data Cloud usage is collected automatically and populated in the VCSP Pulse monthly usage report. For more information on how to collect and report the license usage, see the SaaS Rental Licensing section of the Veeam Rental Licensing and Usage Reporting Reference Guide.

You must review and submit SaaS usage data in VCSP Pulse every month. If you delay submitting a report for two consecutive months, your license management will be suspended.

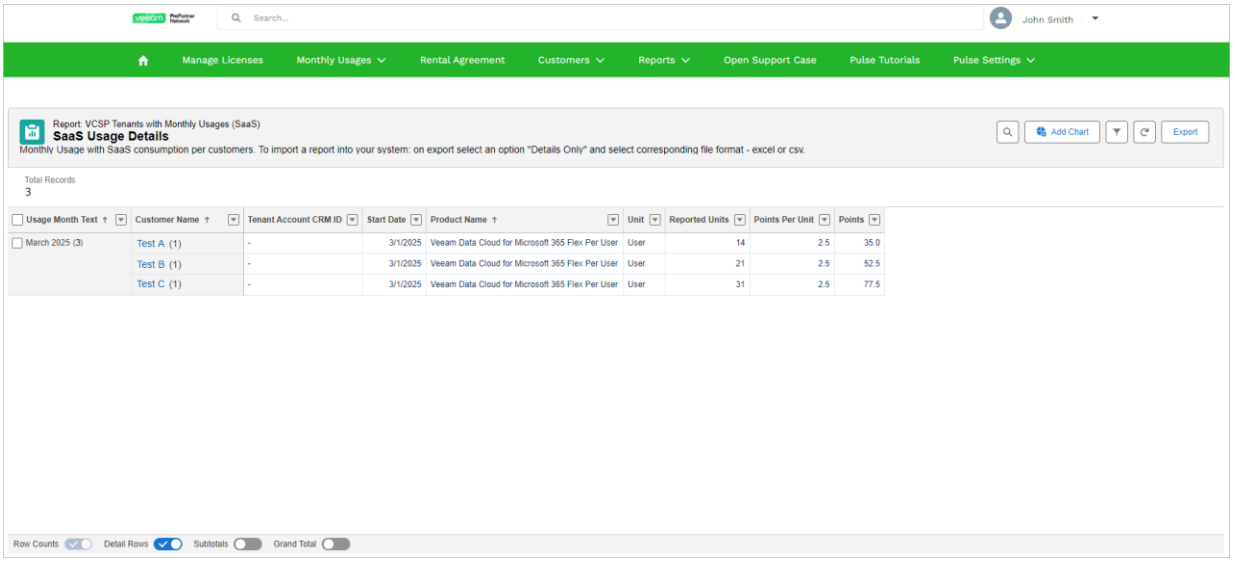
To review and submit a monthly usage report, do the following:

1. Log in to VCSP Pulse. To do this, on the ProPartner Network portal, go to **Manage My Business** > **VCSP Pulse** and click **Login to VCSP Pulse**.
2. Select **Monthly Usages** > **My Actions**. VCSP Pulse will display a list of monthly usage reports that are pending review.
3. To view a monthly usage report, click the link in the **Usage Month** column.
4. To view monthly SaaS usage per customer, click **View SaaS Usage**. VCSP Pulse will open the **SaaS Usage Details** page in a new tab.

> **NOTE**
>
> If there is no SaaS usage for this monthly report, the **View SaaS Usage** link is hidden.

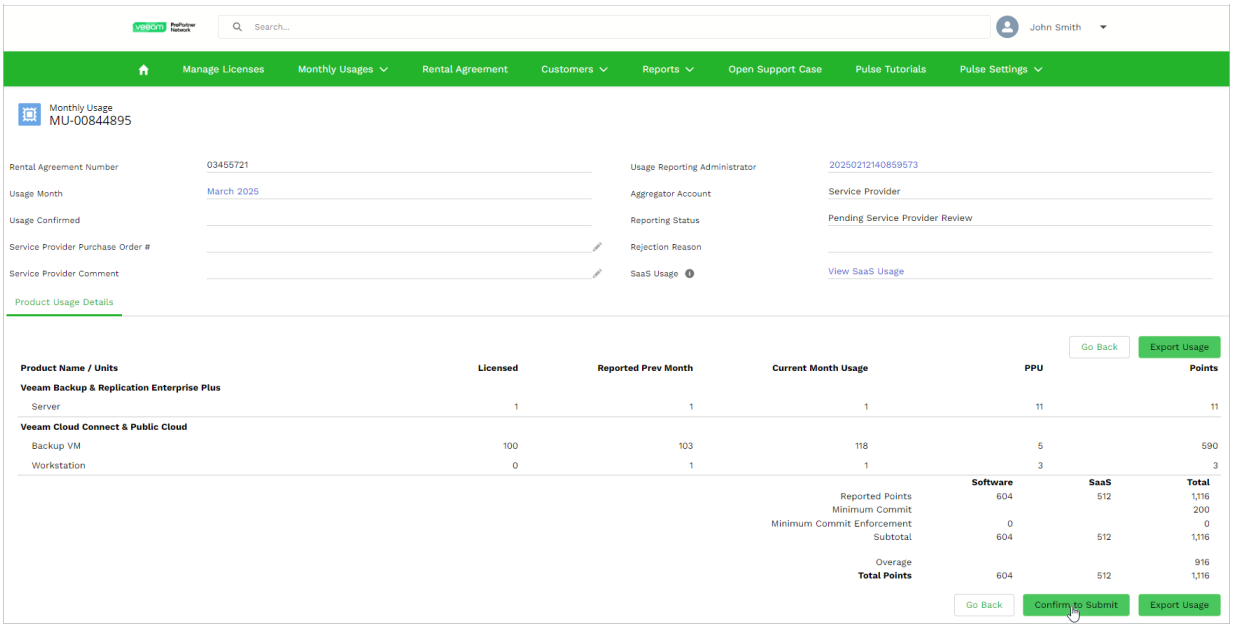



5. On the **SaaS Usage Details** page, review the collected data. After you review the data, you can close this page.




6. On the **Monthly Usage** page, click **Submit Usage** to save the monthly usage report.

7. To submit the saved report to your Veeam Aggregator, click **Confirm to Submit**.



# Managing Portal Settings

The portal enables you to configure your account details, and system notifications. You can manage users and user roles and assign permissions to them. You can also specify how your customers will contact product support.

These features are available only for users with the *Site Settings* permission assigned. For details, see Managing Roles.

## In This Section

- Editing Account Details
- Managing Roles
- Managing Users
- Managing System Notifications
- Setting Customer Support

# Editing Account Details

You can view and edit information about your account.

## Editing Display Name

The display name is used to identify your company in the Veeam Data Cloud for Microsoft 365 platform. For example, it is displayed on the **Organizations** page, where you can switch tenants. For details, see Switching to Customer Portal.

To edit the display name, do the following:

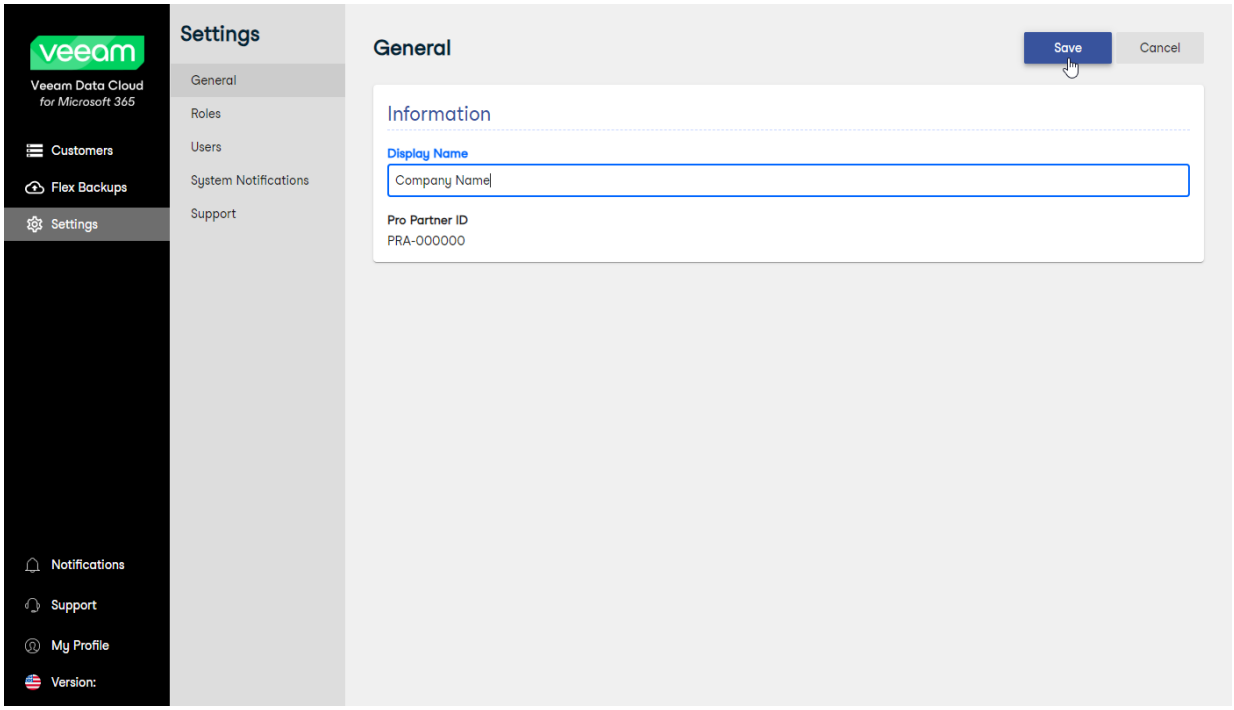
1. Select **Settings** on the left.
2. Make sure that the **General** section is selected.
3. In the **Display Name** field, specify the display name of the account.
4. Click **Save** to apply the changes.

## Viewing ProPartner ID

The ProPartner ID is a Veeam unique identifier for the partner. You obtained your ProPartner ID when you registered in VCSP Pulse.

To view your ProPartner ID, do the following:

1. Select **Settings** on the left.
2. Make sure that the **General** section is selected.
3. Check the value of the **Pro Partner ID** field.



# Managing Roles

You can create and manage custom roles and set their permissions. After you create a role, you can assign it to users. For details, see Managing Users. This feature is available only for users with the *User Management* permission assigned.

## In This Section

- Creating Roles
- Editing Roles
- Deleting Roles

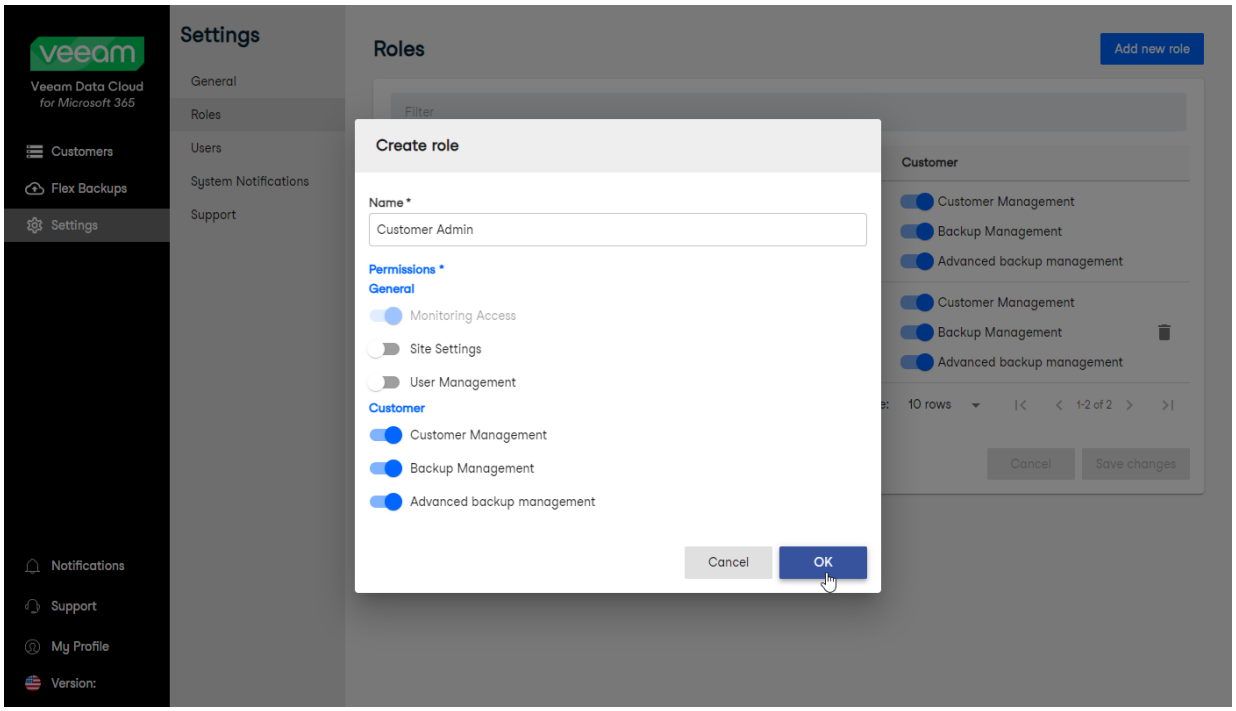
# Creating Roles

You can create custom user roles with specific permissions to differentiate access to portal features for other users.

To create a role, do the following:

1. Select **Settings** on the left.
2. Select **Roles**.
3. Click **Add new role**.
4. In the **Create role** window, specify the following:
   - In the **Name** field, specify a unique name of the role.
   - The **Monitoring Access** permission is selected by default to allow read-only access to the portal.
   - Select **Site Settings** to allow the role to access the **Settings** section. This permission also grants access to the **General** page of the **Settings** section. For details, see Managing Portal Settings.
   - Select **User Management** to allow the role to manage users and user roles of the portal. For details, see Managing Users and Managing Roles.
   - Select **Customer Management** to allow the role to edit customers. For details, see Managing Customers. To allow the service provider to create Veeam Data Cloud customers in VCSP Pulse, you must assign a role in the ProPartner portal. For details, see Assigning Roles in ProPartner Portal.
   - Select **Backup Management** to allow the role to create the first backup policy, manage backup policies of your customers, and export backup sessions. For details, see Creating Flex Backup Policies and Viewing Backup Logs.
   - Select **Advanced backup management** to allow the role to create additional backup policies and manage backup policies of your customers. To use this permission, you must also select **Backup Management**. For details on how to manage backup policies, see Performing Backup.

5. Click **OK** to create the role.

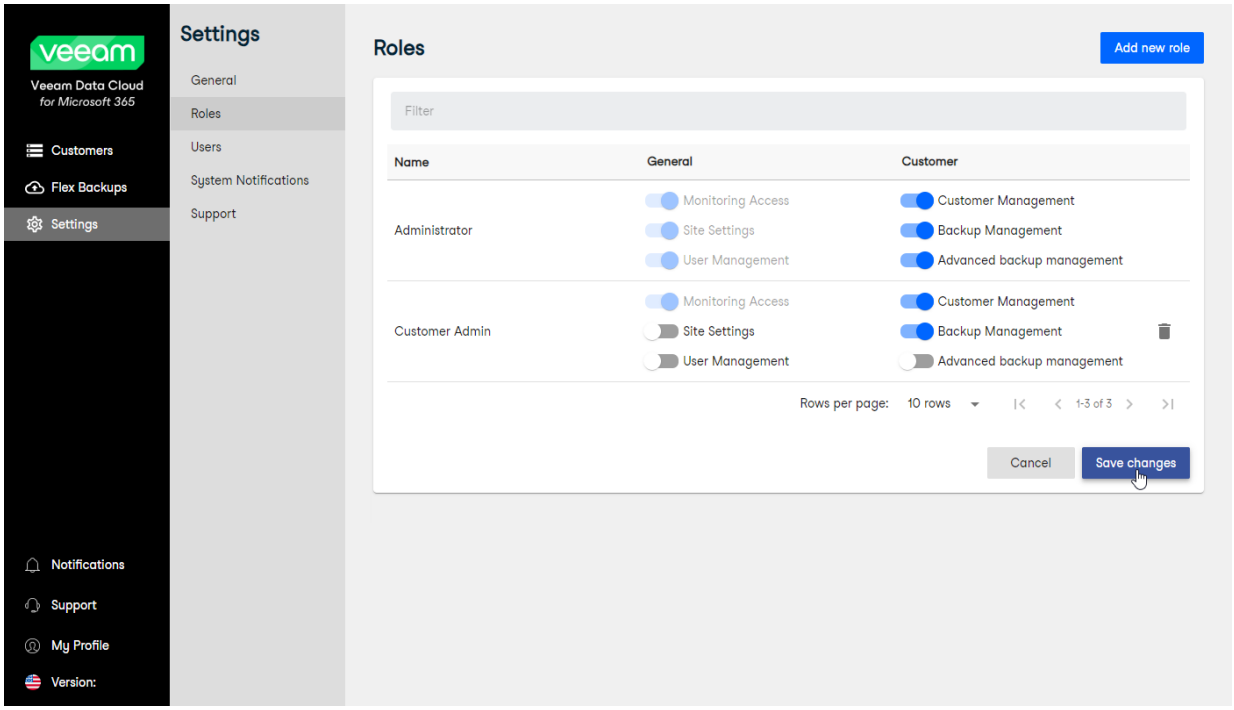


# Editing Roles

You may need to modify roles if user requirements for access to portal features change.

To edit a role, do the following:

1. Select **Settings** on the left.
2. Select **Roles**.
3. In the list of roles, find a role that you want to edit. To quickly find a role with a specific name, start typing the name in the **Filter** field.
4. Select required permissions:
   - The **Monitoring Access** permission is selected by default to allow read-only access to the portal.
   - Select **Site Settings** to allow the role to access the **Settings** section. This permission also grants access to the **General** page of the **Settings** section. For details, see Managing Portal Settings.
   - Select **User Management** to allow the role to manage users and user roles of the portal. For details, see Managing Users and Managing Roles.
   - Select **Customer Management** to allow the role to edit customers. For details, see Managing Customers. To allow the service provider to create Veeam Data Cloud customers in VCSP Pulse, you must assign a role in the ProPartner portal. For details, see Assigning Roles in ProPartner Portal.
   - Select **Backup Management** to allow the role to create the first backup policy, manage backup policies of your customers, and export backup sessions. For details, see Creating Flex Backup Policies and Viewing Backup Logs.
   - Select **Advanced backup management** to allow the role to create additional backup policies and manage backup policies of your customers. To use this permission, you must also select **Backup Management**. For details on how to manage backup policies, see Performing Backup.
5. Click **Save changes**.

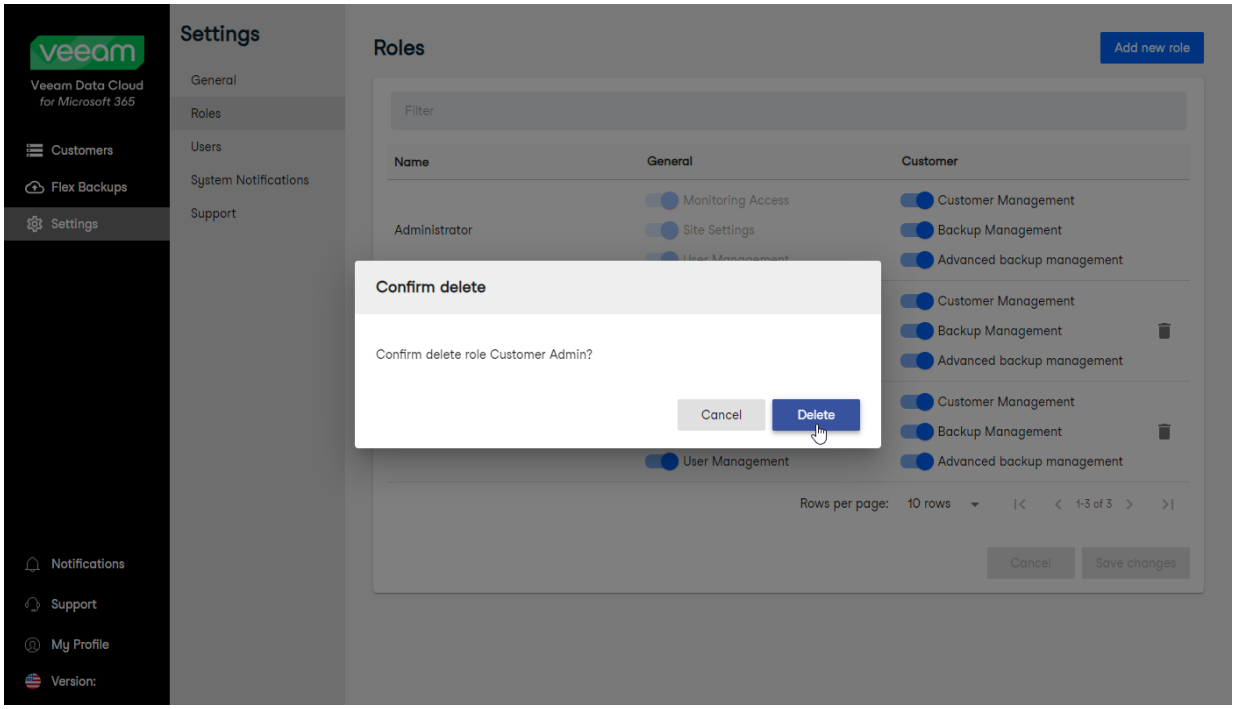


# Deleting Roles

You can delete a role if you do not need it. If you delete a role, it will be removed from all users who are assigned to it. The *Administrator* role is default and cannot be deleted.

To delete a role, do the following:

1. Select **Settings** on the left.
2. Select **Roles**.
3. In the list of roles, find a role that you want to delete. To quickly find a role with a specific name, start typing the name in the **Filter** field.
4. Click the delete button on the right of the role.
5. Click **Delete** to confirm the deletion.



# Managing Users

You can create, edit and delete portal users and assign roles to them. This feature is available only for users with the *User Management* permission assigned. For details, see Managing Roles.

## In This Section

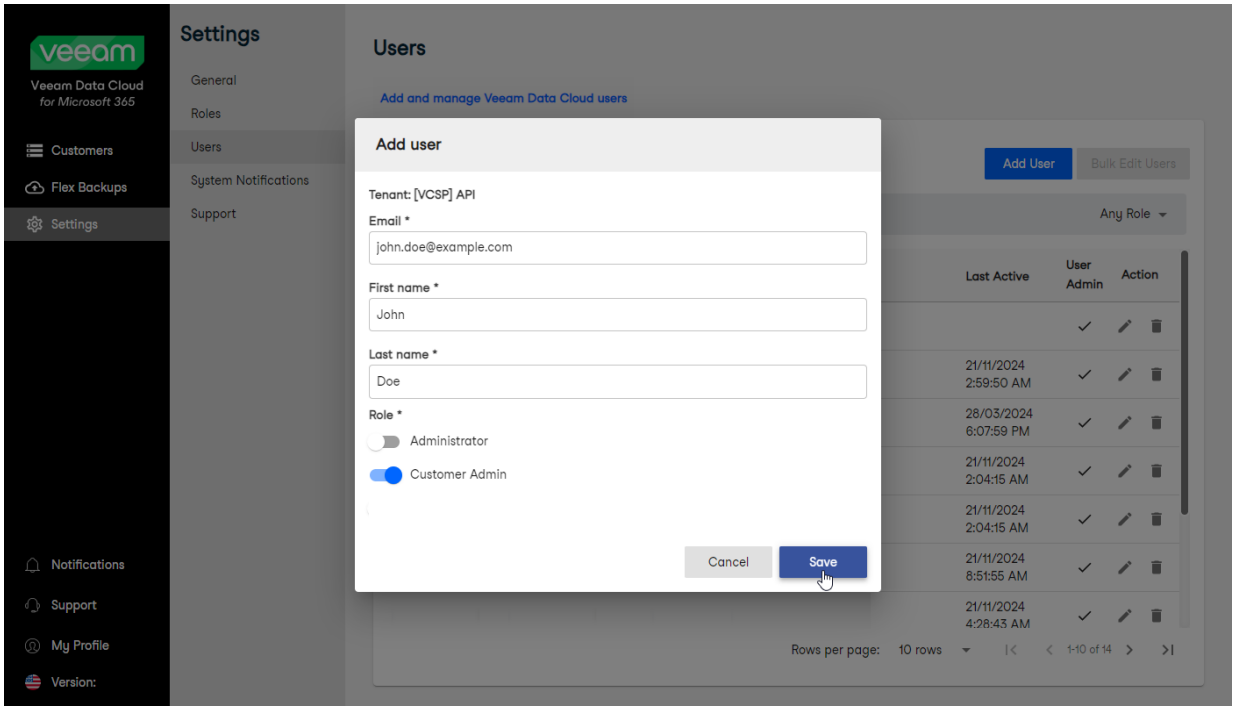
- Adding Users
- Editing Users
- Editing Users in Bulk
- Deleting Users

# Adding Users

You can add users and assign them roles to allow them to log in to the portal and perform specific tasks.

To add a user, do the following:

1. Select **Settings** on the left.
2. Select **Users**.
3. Click **Add User**.
4. In the **Add user** window, specify the following:
   - In the **Email** field, specify a Microsoft 365 email address of the user.
   - In the **First name** and **Last name** fields specify the name of user.
   - In the **Role** section, select required user roles.
5. Click **Save** to create the user.

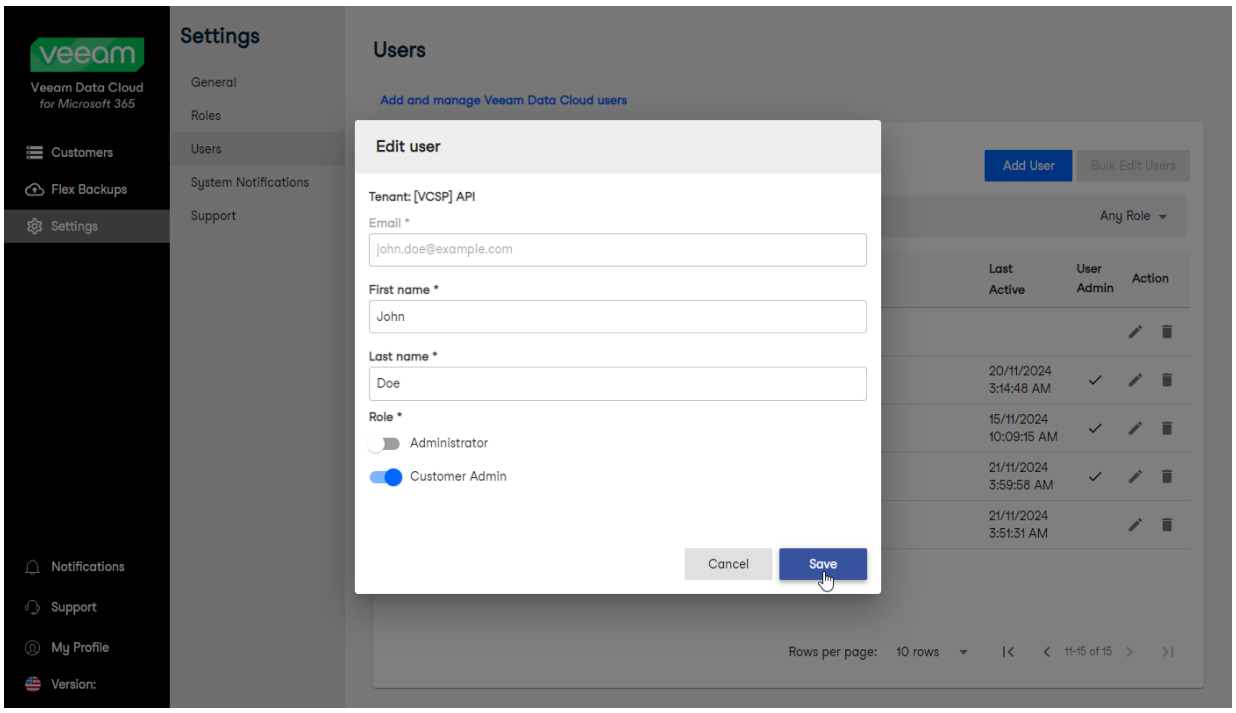


# Editing Users

You may need to edit a user to modify the name and change the role assignment.

To edit a user, do the following:

1. Select **Settings** on the left.
2. Select **Users**.
3. In the list of users, find a user that you want to edit. To quickly find a specific user, start typing in the **Filter** field. Click **Any Role** to filter users by an assigned role.
4. In the **Action** field, click the **Edit** button.
5. In the **Edit user** window, specify the following:
   - In the **First name** and **Last name** fields specify the name of user.
   - In the **Role** section, select required user roles.
6. Click **Save** to apply the changes.

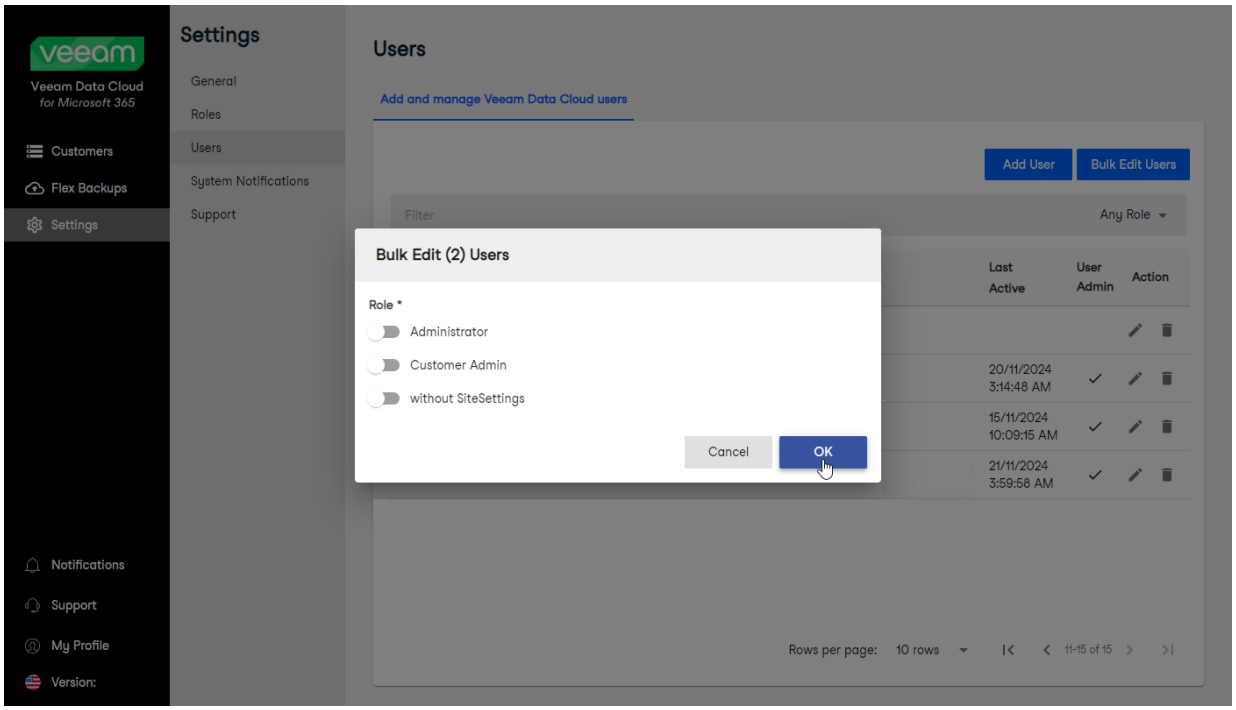


# Editing Users in Bulk

You can assign roles to multiple users in a single operation.

To edit multiple users, do the following:

1. Select **Settings** on the left.
2. Select **Users**.
3. In the list of users, select users that you want to edit. To quickly find specific users, start typing in the **Filter** field. Click **Any Role** to filter users by an assigned role.
4. Click **Bulk Edit Users**.
5. In the **Bulk Edit Users** window, select required user roles.
6. Click **OK** to apply the changes.

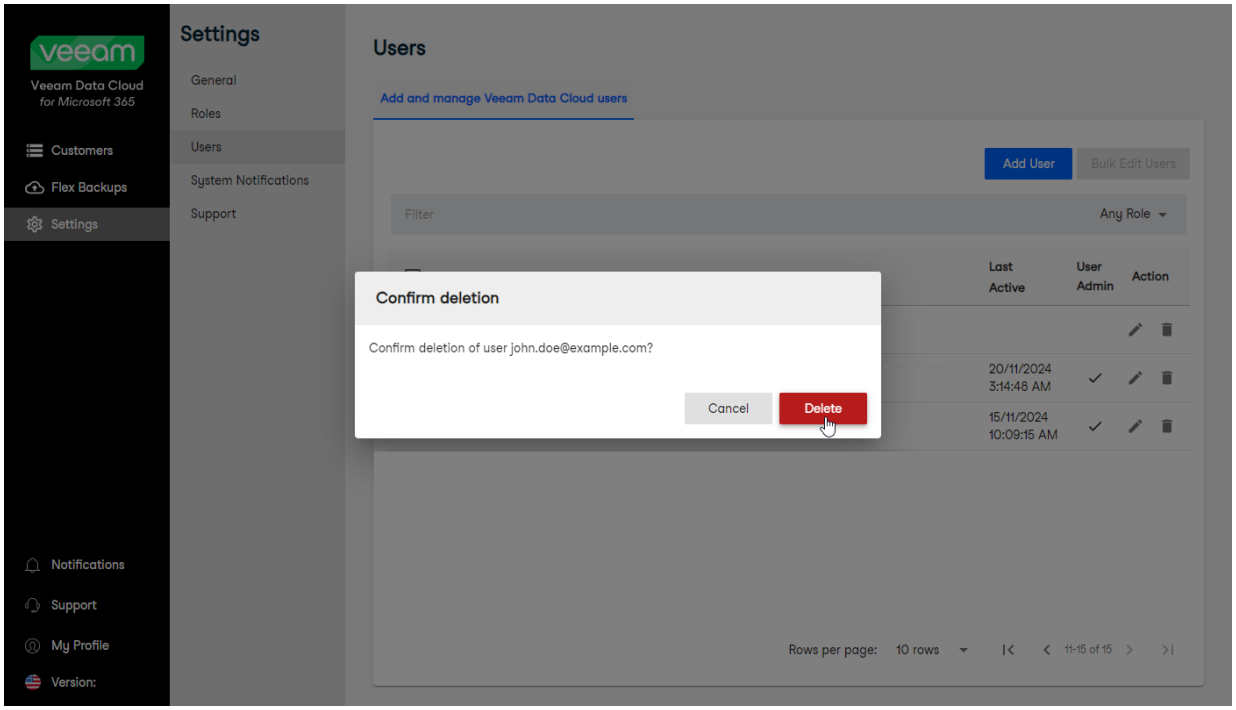


# Deleting Users

If you do not need a user or if the user account was compromised, you can delete it.

To delete a user, do the following:

1. Select **Settings** on the left.
2. Select **Users**.
3. In the list of users, find a user that you want to delete. To quickly find a specific user, start typing in the **Filter** field. Click **Any Role** to filter users by an assigned role.
4. In the **Action** field, click the **Delete** button.
5. Click **Delete** to confirm the deletion.

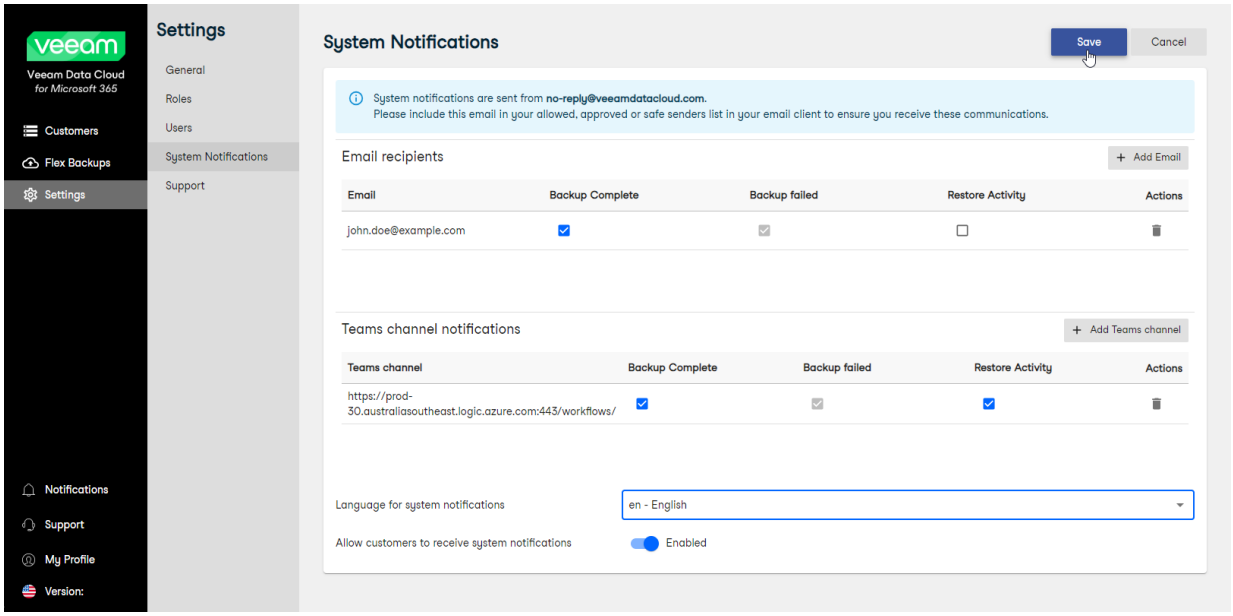


# Managing System Notifications

You can specify the default notifications settings for your customers and manage your contacts that will receive notifications about backups, restores, and license changes for monitoring and support. You can also specify these settings individually for onboarded customers. For details, see Editing Customers.

To adjust notification settings, do the following:

1. Select **Settings** on the left.
2. Select **System Notifications**.
3. In the **System Notifications** section, you can configure the following options:
   - To add an email address for notifications, click **Add Email**.
   - To add a Teams channel for notifications, click **Add Teams channel** and specify the Teams channel incoming webhook URL. For details, see this Microsoft article.
   - After you add a contact for notifications, you can specify notification topics that the contact will receive.
   - To remove a contact for notifications, click the **Delete** button in the **Actions** column.
   - From the **Language for system notifications** drop-down list, select a language in which you want to receive notifications.
   - Select **Allow customer admins to receive system notifications** to allow your customers to receive notifications and specify the notification settings. If you disable this option, the **Settings** > **System** > **Notifications** page will be hidden in the customer portal, and your customers will not receive notifications.
4. Click **Save** to apply the changes.

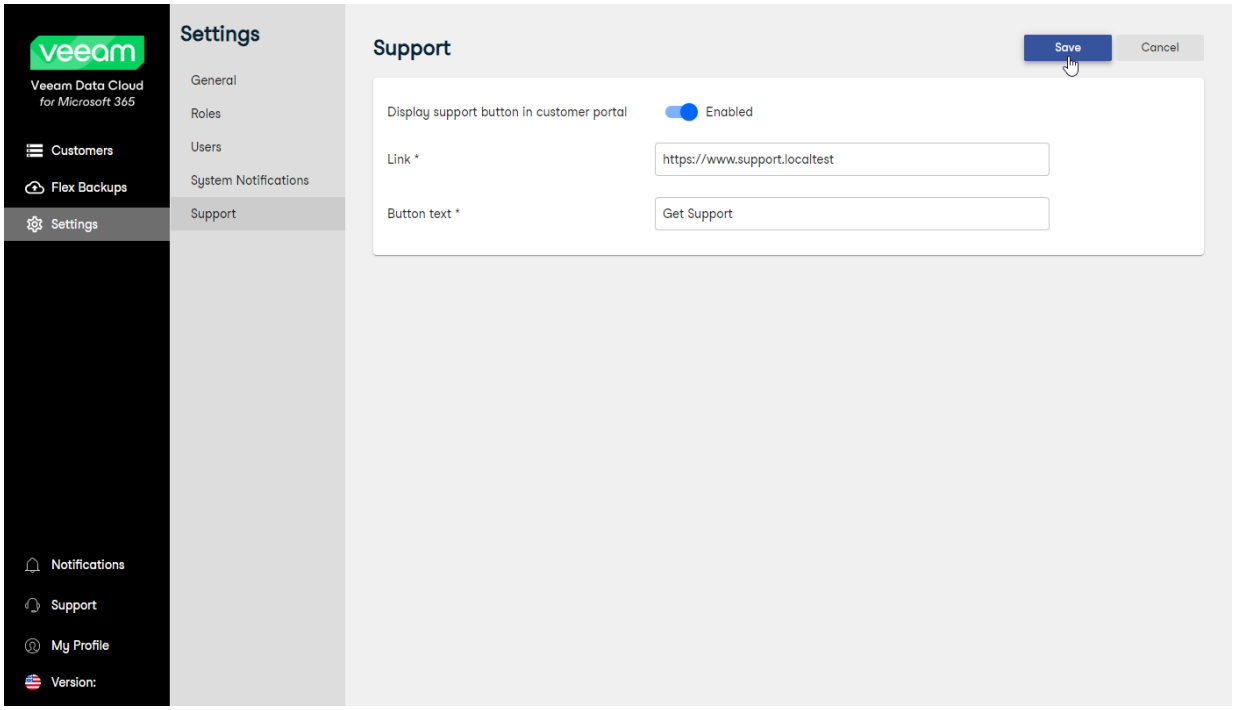


# Setting Customer Support

You can configure access to product support for your customers. If customers need support, they must first contact their service provider. To make it easier for them to access support, specify a link to your support page. A button with this link will appear in the **Support** section of the customer portal.

To set up customer support, do the following:

1. Select **Settings** on the left.
2. Select **Support**.
3. Select **Display support button in customer portal**, to display the **Support** section in the customer portal.
4. In the **Link** field, specify the URL of the support page.
5. In the **Button text** field, specify the label for the button that will redirect customers to the URL specified in the **Link** field.
6. Click **Save** to apply the changes.



# Switching to Customer Portal

Veeam Data Cloud for Microsoft 365 allows you to work in the customer portal on behalf of your customers. You may need to work in the customer portal if your customer requires a fully managed service, such as data restore. For details, see Managed Data Restore.

Before you can use this feature, your Microsoft 365 account that you use to log in to the service provider portal has to be added to the customer as an admin user.

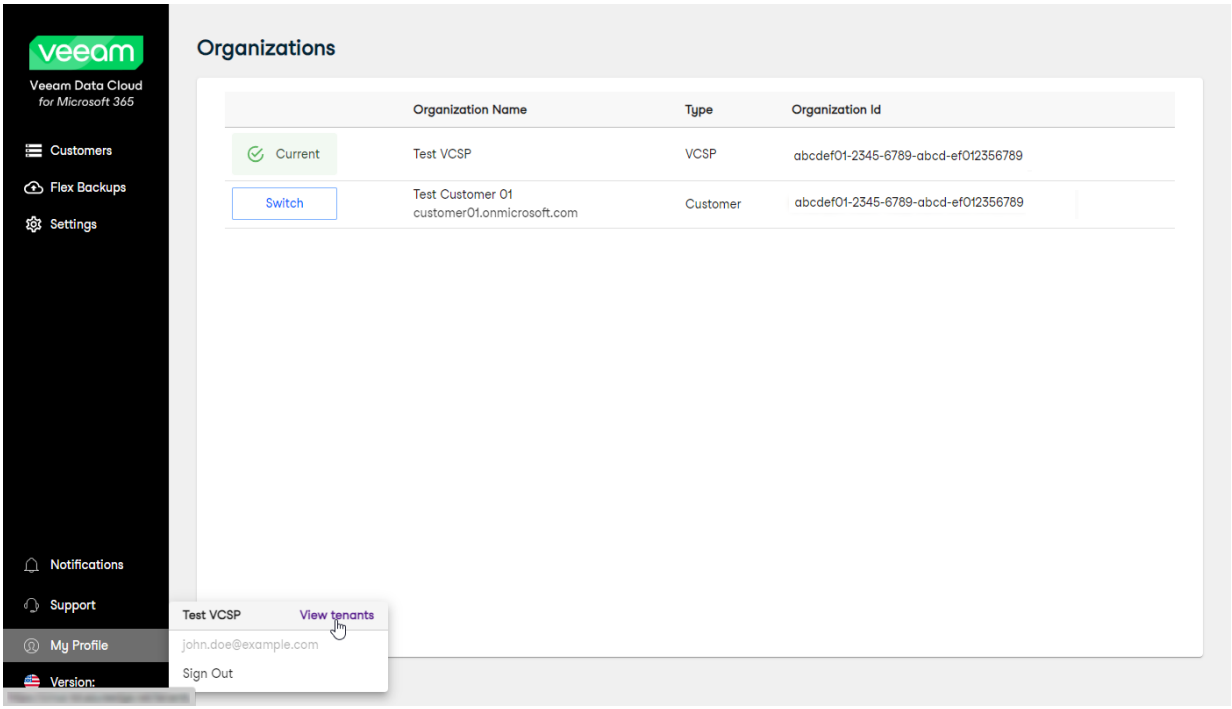
Veeam Data Cloud for Microsoft 365 supports the following methods to add an admin user:

- Your Microsoft 365 account is automatically added to your customers as an admin user if you specify it as *VDC Primary Administrator* in VCSP Pulse. For details, see Creating Customers.
- You can add your Microsoft 365 account to a pending customer in Veeam Data Cloud for Microsoft 365. For details, see Adding Admin Users.
- Your customers can add your Microsoft 365 account through the customer portal. For details, see the Adding Admin Accounts section of the Veeam Data Cloud for Microsoft 365 User Guide.

To switch to the customer portal, do the following:

1. Select **My Profile** on the left.
2. Click **View tenants**.
3. In the list of available organizations, click **Switch** next to the name of the customer you want to work with.

When you finish working in the customer portal, you can switch back to the service provider portal.



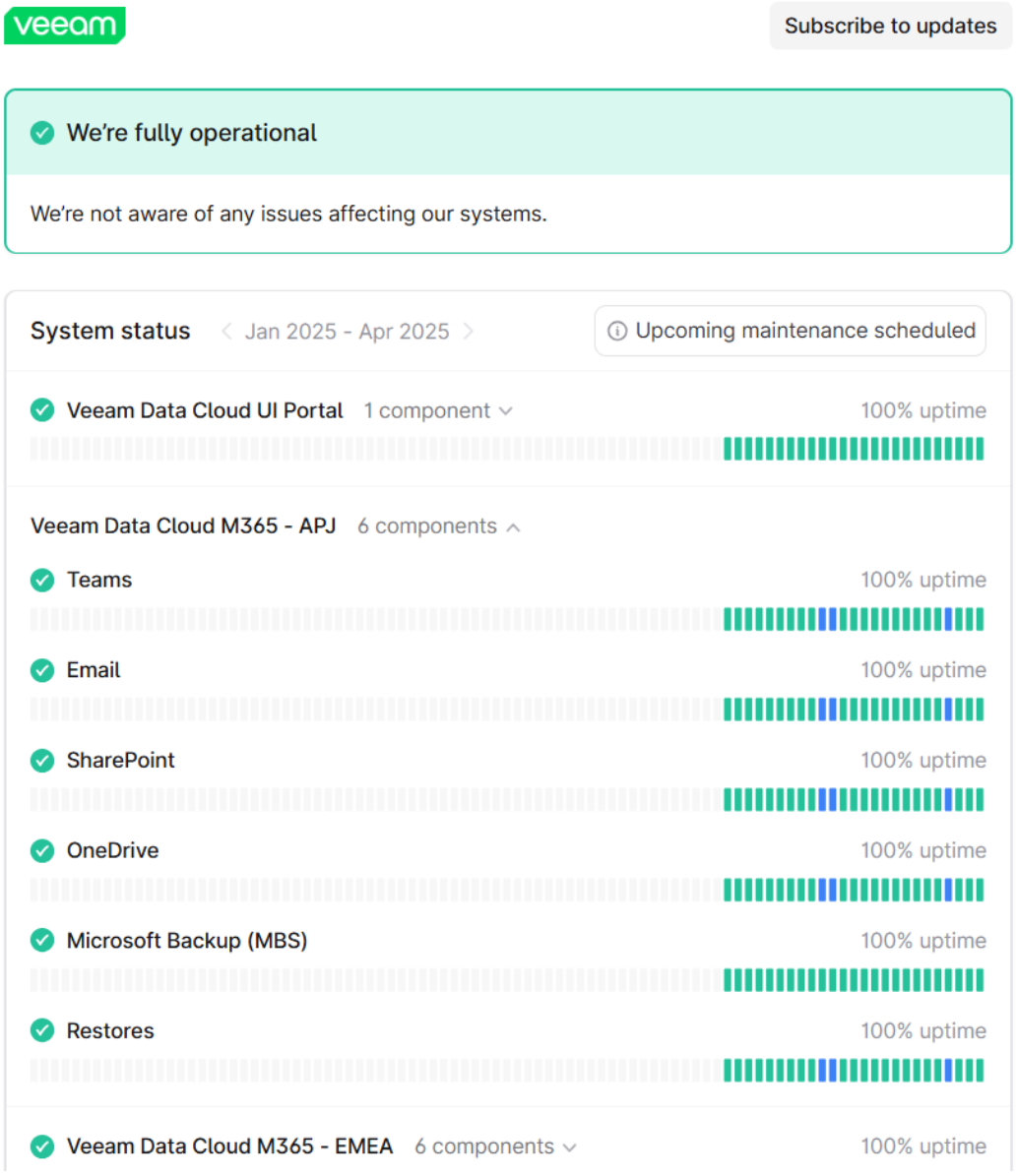
# Viewing Veeam Data Cloud Status

You can view the status of Veeam Data Cloud for Microsoft 365 services. To do this, open this Veeam webpage in your web browser.

The status page displays information on availability of the following services:

- Microsoft single sign-on authentication service for Veeam Data Cloud UI Portal
- Microsoft Exchange, Microsoft SharePoint, Microsoft OneDrive for Business, Microsoft Teams backup services, Microsoft Backup Storage service (MBS) and Restores service for Veeam Data Cloud for Microsoft 365, in each of the supported regions: APJ, EMEA and AMER
- Backups service and Microsoft single sign-on authentication service for Veeam Data Cloud for Microsoft Azure UI Portal
- Microsoft single sign-on authentication service for Veeam Data Cloud Vault UI Portal

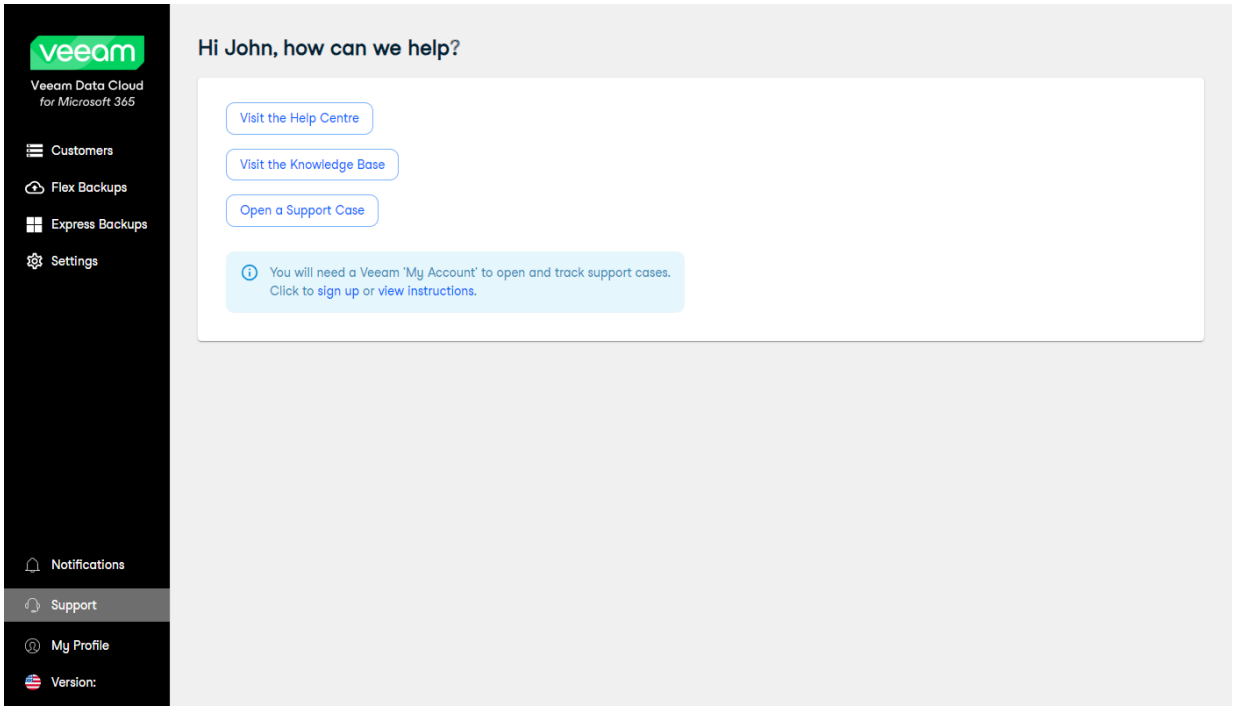
You can view the uptime of each service and check if there is upcoming scheduled maintenance.



> **TIP**
>
> You can click **Subscribe to updates** to set up receiving updates via email, RSS or Slack for upcoming or existing incidents.

# Getting Support

If you require assistance, you can access online help at Veeam Help Center or contact Veeam Customer Support. If your customers need support, they must contact their service provider. You can configure the support page of the customer portal. For details, see Setting Customer Support.

To view the Veeam websites that provide product support, click **Support** on the left and select one of the following options:

- Click **Visit the Help Centre** to view the documentation for Veeam Data Cloud for Microsoft 365.
- Click **Visit the Knowledge Base** to view the knowledge base articles related to Veeam Data Cloud for Microsoft 365.
- Click **Open a Support Case** to raise a support case. You will need to log in to the Veeam My Account Portal. For details on how to create a Veeam account, see this Veeam KB article.