CiraSync Partner QuickStart Guide

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Cira Apps Ltd.

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About this Publication

The following documentation is a QuickStart Guide for CiraSync Partners. This guide describes the following:

1. The Partner Portal
2. Management of CiraSync Client Tenants
3. Configuration of CiraSync Client Tenants
4. Billing and Licensing

The Partner Portal

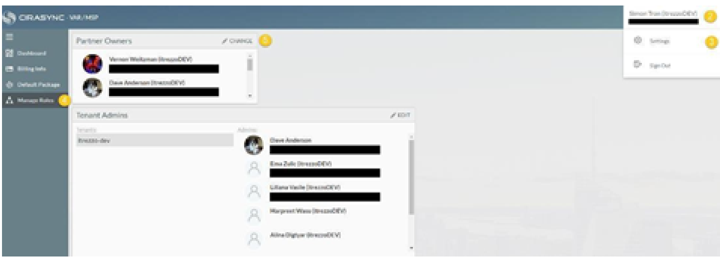
Partner Portal: First-Time Access

The CiraSync Partner Portal is initially accessed using the invitation email that is sent to the partner master account. The account that is initially used to log into the CiraSync partner portal will become a Portal Owner, a role which has administrative permissions over the Partner Portal. Following the initial login of the partner's master account, more portal users can be set as a Portal Owner.

Adding Additional Portal Owners

The following procedure shows how to add additional Portal Owners.

1. Log in to the CiraSync Partner Portal.
2. Click the username at the top-right corner of the Partner Portal dashboard.
3. Click **Settings**.
4. Click **Manage Roles** in the left-hand navigation panel.
5. Click **CHANGE** in the **Partner Portal** pane. (See figure below.)



6. Select the desired account that is to be set as a **Portal Owner**.

   NOTE: If the desired Office 365 user is not listed, that means the desired user account has yet to have logged in to the Partner Portal. Please have the desired user log in to the Partner Portal before giving them Portal Owner role.

7. Click **SAVE**.

Managing CiraSync Client Tenants

As a Portal Owner, you can also add your clients as tenants that you can manage on the CiraSync Partner Portal.

This section describes the following procedures:
1. Adding a Client Tenant
2. Defining Tenant Permissions
3. Adding Tenant Administrators

Adding a Client Tenant

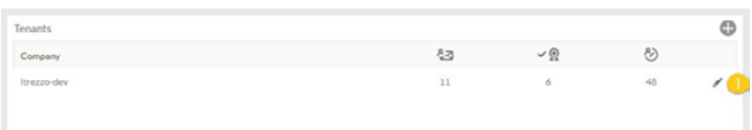
1. Click the **+** in the **Tenants** pane on the main Partner dashboard.
2. Provide the desired email that is to become a CiraSync tenant.

   NOTE: User account must have the **Tenant Admin Role** to be able to accept the invitation to become a client tenant managed by your Partner Portal. Ideally, this user account will be an account you have access to so you can immediately accept the invitation.

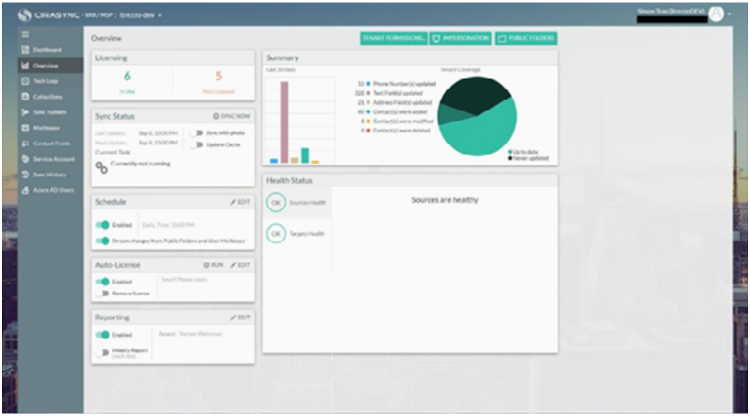
3. Click **SEND**.
4. Log in to the email that was provided on the Partner dashboard.
5. Accept the invitation. Once the invitation has been accepted, the tenant should now appear in the **Tenant** pane on the main Partner dashboard.

Defining Tenant Permissions

1. Click the **Pencil** icon next to any of the tenants listed in the **Tenants** pane on the main Partner dashboard. (See figure below.)



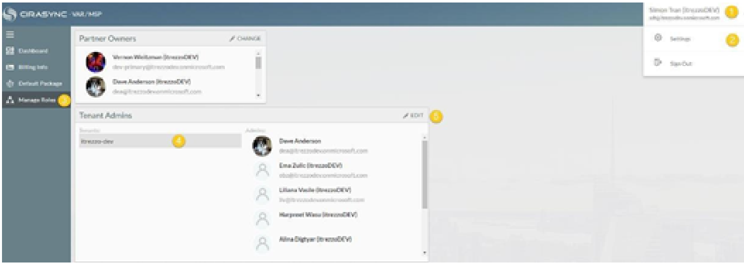
   You will be taken to the Tenant Overview dashboard.



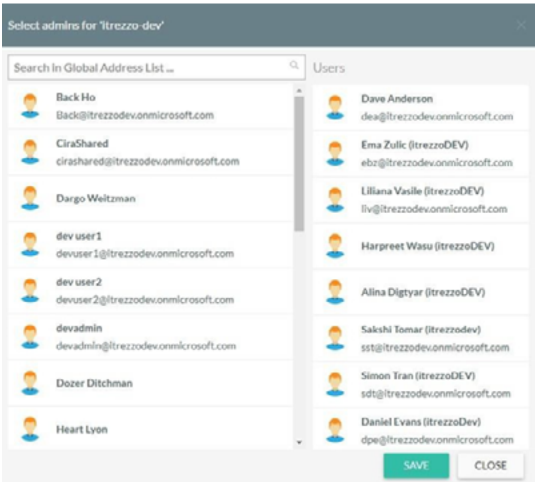
2. Click **Tenant Permissions** at the top of the dashboard. A window will appear with a list of all tenant permissions.
3. Check and uncheck the boxes to either grant or revoke tenant permissions. The following is a list of tenant permissions that can be granted:
    a. Ability to change User License and AutoLicense collection.
    b. Ability to run task: Sync Tenant, Sync Mailbox, Auto-License, Purge, Restore, and Cleanup.
    c. Ability to change Schedule, Reporting, Contact Fields, Service account.
    d. Ability to manage Sync Tunnels and Collections.
4. Click **SAVE**.

Adding Tenant Administrators

1. Click the username at the top-right corner of the Partner Portal Dashboard.
2. Click **Settings**.
3. Click **Manage Roles** in the left-hand navigation panel.
4. Select desired tenant to add administrators to in the **Tenant Admins** pane.
5. Click **EDIT**. (See figure below.)



The **Select Admins** window will appear.



6. Select the desired users to turn into tenant admins. The selected user will appear in the **User Column**.
7. Click **SAVE**.

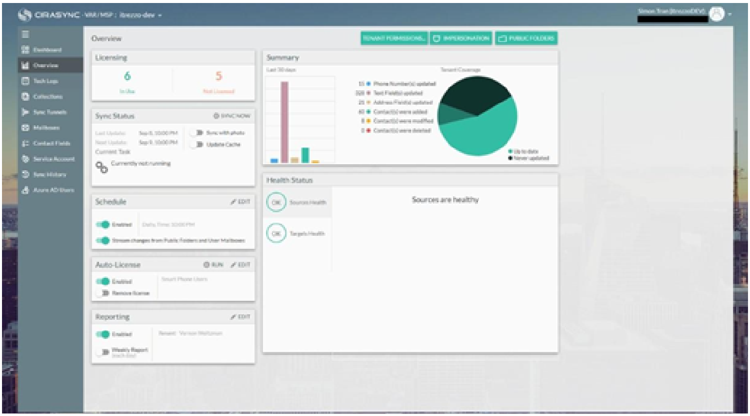
Configuring CiraSync Tenants

The section includes the following procedures:

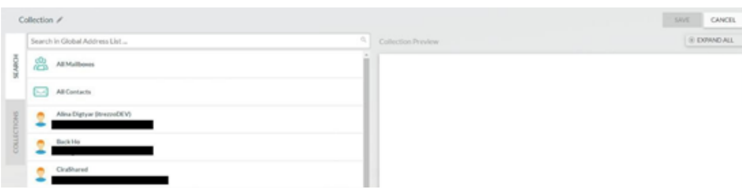
1. Auto-Licensing Tenant Users.
2. Creating Sync Tunnels and Running a Manual Sync.

Auto-Licensing Tenant Users

1. Click **Overview** to return to the **Tenant Overview** dashboard. (See figure below.)



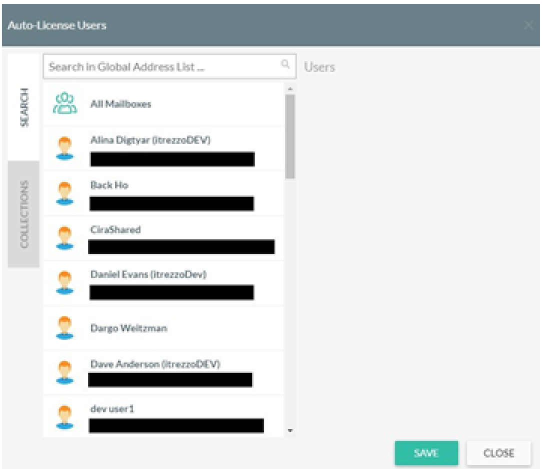
2. Click **Collections** in the left-hand navigation panel.
3. Click the + in the top-right corner of the dashboard. You will be taken to the **Collection** dashboard. (See figure below.)



4. Name the Collection. For this example, name the Collection Users.
5. Hover the mouse over the desired users and click the green + to add them to the Collection.

NOTE: Multiple users can be added with a single click by using a Dynamic Distribution Group. If using a Dynamic Distribution Group, the group will show up as a result in the SEARCH tab. To learn how to create Dynamic Distribution Groups, click here.

6. Click **SAVE**.
7. Click **Overview** in the left-navigation panel to return to the **Tenant Overview** dashboard.
8. Click **EDIT** in the **Auto-License** pane. The **Auto-License Users** window will appear. (See figure below.)

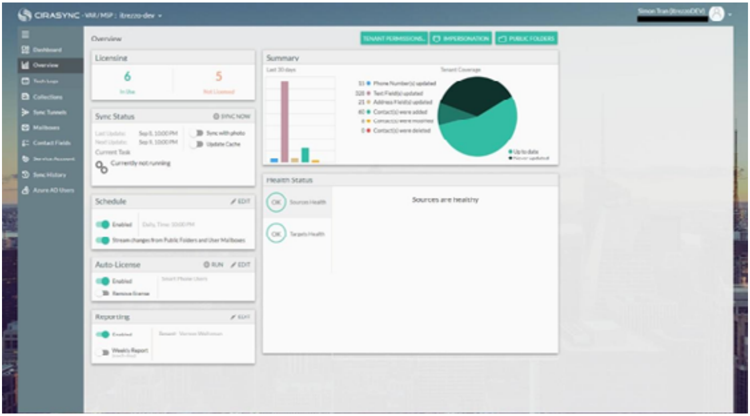


9. Click the **COLLECTIONS** tab.
10. Select the **Users** Collection created for this procedure.
11. Click **SAVE**, and you will return to the **Tenant Overview** dashboard.
12. Click **RUN** in the **Auto-License** pane.

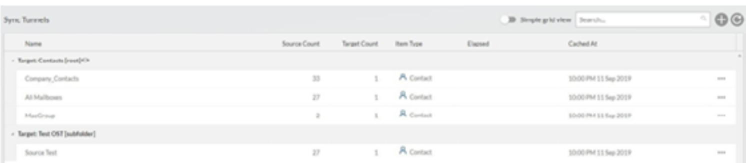
Creating Sync Tunnels and Running a Manual Sync

Sync Tunnels are task configurations that tell CiraSync which items are to be synced and to whom these items should to be synced to. The following procedure briefly how to create a sync tunnel and run a manual sync.

1. Return to the Tenant Overview dashboard. (See figure below.)



2. Click **Sync Tunnels** in the left-hand navigation panel. You will be taken to the Sync Tunnel dashboard. (See figure below.)



3. Click the **+** to pull up down a drop-down list.
4. Select a type of sync tunnel to create. For this example, click **Add a new Contactd list**.
5. Select a source type. For this example, click **Global Address List**.
6. Select a source for the sync tunnel.

   NOTE: A source of a GAL sync can be All Contacts and/or All Mailboxes, a single user mailbox, a Dynamic Distribution Group, or a Contact Collection.

7. Select the target of the sync tunnel.

    NOTE: A source of a GAL sync can be All Contacts and/or All Mailboxes, a single user mailbox, a Dynamic Distribution Group, or a Contact Collection.

8. Specify Contact List options.
9. Return to the Tenant Overview Dashboard.
10. Click Update Cache in the Sync Status pane.
11. Click SYNC NOW to run a manual sync.

For detailed step-by-step instructions on how to create a sync tunnel and run a manual GAL sync, click **here**.

Billing and Licensing

This section describes the following:

1. About CiraSync Partner Billing.
2. Purchasing Daily Subscription Units.
3. DSU Explanation

About CiraSync Partner Billing

CiraSync bills partners using **Daily Subscription Units (DSU)**, which are single-user, single day subscriptions. Partners are only charged for the first 25 days of the month. The remaining days of the month are a true-up period that is not charged for. Furthermore, DSUs do not expire.

DSUs are bought in packages. These packages can be managed through the partner portal. Bulk purchases are eligible for volume discounts. In other words, larger package purchases will be cheaper than buying smaller packages.
At the beginning of the Partner Program, CiraSync offers Partners an initial 2,000 DSUs for free. Partners are free to use these licenses as desired.
CiraSync has no billing relationship with Partner customers. CiraSync Partners can bundle this offer with other services and can add additional customers/tenants to share the same pool of DSU's.

Purchasing Daily Subscription Units

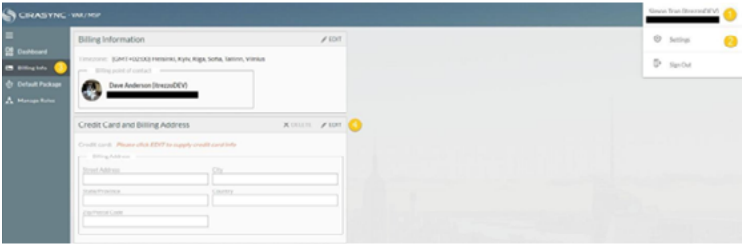
CiraSync offers the following two ways to purchase DSUs:

1. By setting up an automated billing plan for all DSU packages.
2. By manual selection of specific packages and then making a one-time credit card transaction.

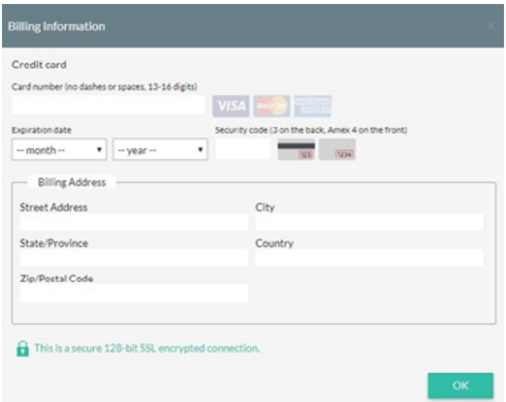
Automated Billing Plan

The automated billing plan enables Partners to issue a new DSU package when the package has been exhausted. This ensures uninterrupted service to Partner Clients. Partners are billed according to the Billing Point of Contact that can be set up on the Partner Portal. Read the following procedure to learn how to set up an Automated Billing Plan.

1. Click the username at the top-right corner of the Partner Portal dashboard.
2. Click **SETTINGS**.
3. Click **Billing Info** in the left-hand navigation panel.
4. Click **EDIT** in the **Credit Card and Billing Address** pane. (See figure below.)



The **Billing Information** window will appear. (See figure below.)

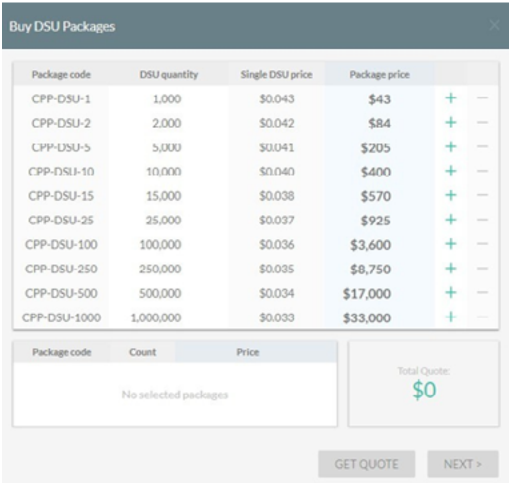


5. Fill out all fields.
6. Click OK.

Manual Purchase

1. Click the username at the top-right corner of the Partner Portal dashboard.
2. Click **SETTINGS**.
3. Click **Default Package**.
4. Click **BUY DSU PACKAGES**. (See figure below.)

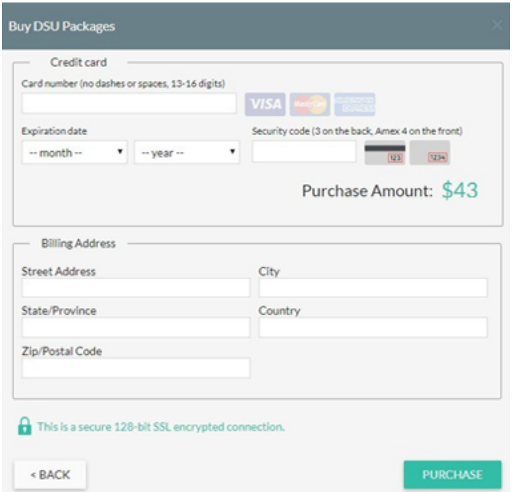
The **Buy DSU Packages** window will appear. (See figure below.)



5. Click the **+** next to the desired package to add to overall purchase.

   NOTE: Click the **–** to remove a package from overall purchase.

6. Click **NEXT**. The **Buy DSU Packages** window will appear. (See figure below.)



7. Fill in all the fields.
8. Click **PURCHASE**.

CiraSync Partners only: DSU Explanation

Microsoft and most SaaS subscriptions are based on months of services. CiraSync also has the same model for customer subscriptions.

However, CiraSync has adopted a daily subscription model for Managed Service Provider (MSP) billing.

Here is how DSU's (Daily Subscription Units) are used.

The MSP purchases a DSU package from CiraSync. Let's says the package is for 5000 DSU's Rules:

- There are 25 billable days in each billing cycle.
- The total licensed users across all tenants is aggregated to a daily DSU consumption.
- The DSU consumption on the 1st day of the month is the initial Peak DSU.
- If the DSU consumption increases above yesterday's Peak DSU, today's consumption is the new Peak DSU.
- The Peak DSU cannot be reduced until the 26th of the month.
- From the 26th to the end of the month, there is no consumption charge for any licensed users.

We will call this the “True Up” period.

- However, the Peak DSU on the last day of the month determines the new Peak DSU on the 1st day of the following month. MSP’s must remove users before midnight on the last day of the month to reduce Peak DSU.
- DSU’s are purchased in advance, but an MSP’s balance may be permitted to go negative in order to insure continuity of service to the customer.
- When the DSU balance goes negative, the MSP’s is charged for a new DSU package and is charged to their credit card on file.

The benefits to the MSP are as follows:

1. As CiraSync users are automatically licensed at each tenant based on GAL or group membership, DSU consumption is automatically calculated.
2. If Tenant X terminates 10 staff members and Tenant Y adds 10 staff members on the same day, the DSU consumption would not be affected.
3. Adding 100 users on the 26th of the month or later would mean that usage is free (no DSU Consumption) until the first day of the following month.
4. There is no annual commitment to get the best price.
5. A single user in a tenant can be licensed (no 10 pack is required)
6. Larger quantity DSU packages have reduced daily use rates so the MSP can choose the most advantageous discount.

Support and Resources

For support and answers to commonly asked technical questions, check out the resources listed below:

- **CiraSync Support Homepage**—The Support Homepage provides technical articles and FAQs to troubleshoot any problems you may encounter on CiraSync or the capabilities of the CiraSync SaaS platform.
- **Security FAQ** and **CiraSync Privacy Policy**—The Security FAQ pages and Data Privacy Policy addresses how Cira Apps Ltd. handles user data.
- **Contact Us**—You can always submit a support ticket by sending an email to **support@cirasync.com**. Our Customer Success Team (rated 5 stars on **G2 Crowd** and **Capterra**) is happy to help you with any issues you may have!