Move/Setup New Customer to SES Guide

Steps to Setup and Link Customer or Create New Customer Account

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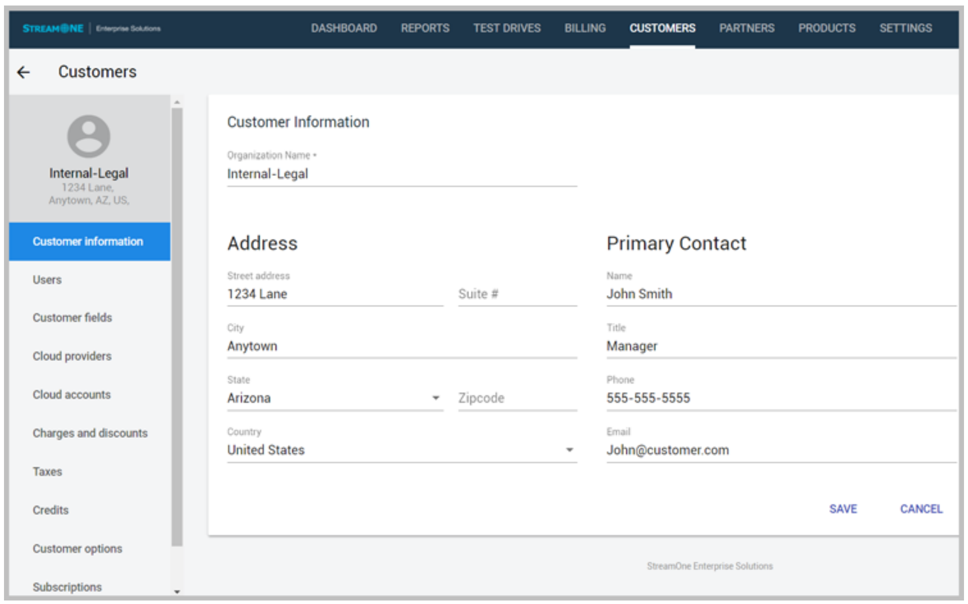
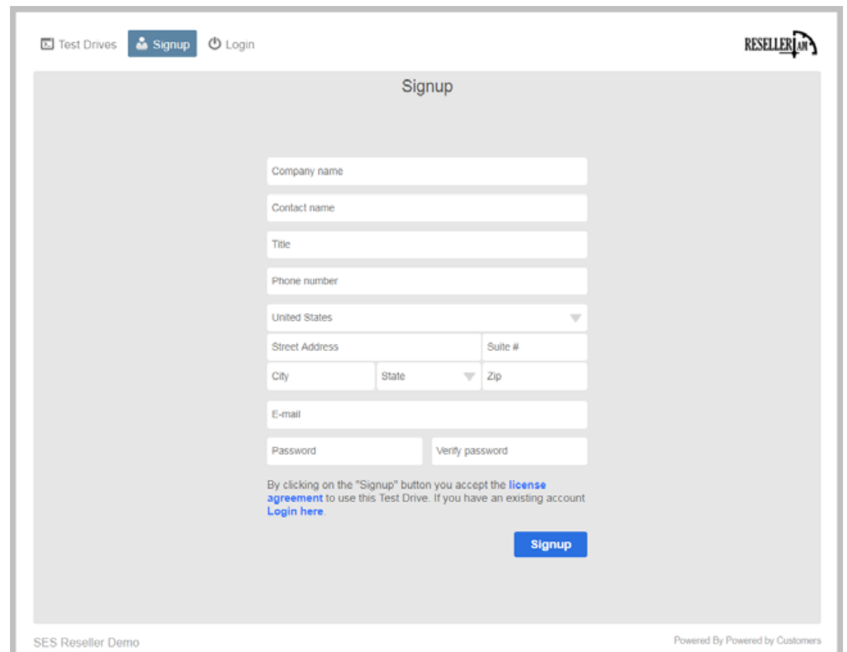
Set up a new Customer in StreamOne Enterprise Solutions Platform

Customer accounts can be created two ways

- Resellers can create the customer account using the reseller portal access



- Customers can request an account through the reseller end-customer portal (widget) using the Signup feature.



Part 1: Customer accounts can be created two ways

- Resellers can create the customer account using the reseller portal access
- Customers can request an account through the reseller end-customer portal, also known as the widget, using the Signup feature. (Recommended)

Note: For more information regarding configuring the customer widget, click on this link

Part 2: Adding a New Customer to StreamOne Enterprise Solutions

- From the StreamOne Enterprise Solutions (SES) Home screen, select the Customer module
- Click [Add]
- Client section: This is where you can add company information
  a. Organization: Enter the company name.
  b. Name: Enter the contact name.
  c. Title: Enter the title for the contact.
  d. Email: Enter the email address for the contact name. This is the individual that will receive platform/system notifications.
  e. Phone: Enter the phone number for the contact.
  f. Address: Enter the company address.
- Save

Here's the **detailed** how-to Knowledge Base article: *"How to Create Platform Customer Accounts"* – LINK

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Part 3 – Linking an existing AWS cloud account

- Go to Customers Module – Cloud Providers and check mark the AWS box.
- Go to Cloud Accounts and click the ADD button
  a. In the dropdown select Amazon Web Services,
  b. Dropdown under Account ID and select New Account to enter the 12 digit AWS account number,
  c. Under Email enter the Root email associated with the 12 digit account number.
  d. Go to the bottom of this dialog box and press Save.

Note: The instructions for how to create the Role ARN will appear in the next dialog box, to be given to the account owner or account Admin. Once the Role ARN has been created, paste the Role ARN string in the field named AWS Role ARN and click the Not Checked/Check button to Validate.

- Click Save
- Charges and Discounts - Support Plans: add AWS Business Level Support and save.

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Part 4: Link Request

- The link request will be sent to the SES Cloud Support team for approval.
- SES Cloud Support will send the invitation to link/"join the organization" on behalf of the reseller. This invitation will be sent via AWS.
- The invitation will expire in 2 weeks if no action has been taken.

Please see the full how-to in the Knowledge Base Article: "*How to Add (Link) an Existing AWS Account*" - LINK

Part 5: How to Request a Net New AWS Account

- Go to Customer Module – Cloud Accounts
  - Click the Request link, Choose Cloud Provider AWS, Click the Request button at the bottom right corner of this dialog box.
- The request will be sent to SES Cloud Support for approval.
- The Admin credentials will be sent to the end user.
- SES Cloud Support will notify Reseller that the credentials has been sent. At that point, if the Reseller needs a set of credentials, you can respond to the email notification and we will setup your credentials.

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