

Move/Setup New Customer to SES Guide

Steps to Setup and Link Customer or Create New Customer Account

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.

StreamOne Enterprise Solutions Platform - Customers

← Customers

Internal-Legal
1234 Lane,
Anytown, AZ, US.

Customer information

Users

Customer fields

Cloud providers

Cloud accounts

Charges and discounts

Taxes

Credits

Customer options

Subscriptions

Customer Information

Organization Name
Internal-Legal

Address

Street address
1234 Lane Suite #

City
Anytown

State
Arizona Zipcode

Country
United States

Primary Contact

Name
John Smith

Title
Manager

Phone
555-555-5555

Email
John@customer.com

SAVE CANCEL

StreamOne Enterprise Solutions

Test Drives Signup Login

RESELLER

Signup

Company name

Contact name

Title

Phone number

United States

Street Address Suite #

City State Zip

E-mail

Password Verify password

By clicking on the "Signup" button you accept the [license agreement](#) to use this Test Drive. If you have an existing account [Login here](#)

Signup

SES Reseller Demo

Powered By Customers

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](#)

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.

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.