**How To Perform a Demo of the Portal**

This script helps you perform a full, in-depth demo of your portal. You can modify as needed.

* Demo script material that is meant to be shared with clients will be written in green.
* FAQs are written in blue. They can be shared with the customer or can be left hidden for your own internal information.
* Notes to you, as the MSP, are written in the default text color.

Table of Contents

[Open a Demo-Ready Company in CloudRadial 2](#_Toc129100949)

[How Does Logging into the Portal Work? 2](#_Toc129100950)

[For All Users – The First 4 Tabs 2](#_Toc129100951)

[Let's look at the tabs on the left 2](#_Toc129100952)

[Open the Company Tab 2](#_Toc129100953)

[Open the University Tab 3](#_Toc129100954)

[Ticketing 3](#_Toc129100955)

[**Open the Support Tab** 3](#_Toc129100956)

[**Open the Report a Problem Tab** 3](#_Toc129100957)

[**Click on the ADD link at the top right** 4](#_Toc129100958)

[**Click on the Routing Tab** 4](#_Toc129100959)

[**Click on Request a Service** 4](#_Toc129100960)

[Hardware and Software Assets 5](#_Toc129100961)

[**Open the Infrastructure Tab** 5](#_Toc129100962)

[**Open the Endpoints Tab** 5](#_Toc129100963)

[Office 365 Assets 6](#_Toc129100964)

[**Open the Usage Tab** 6](#_Toc129100965)

[Backup/Security Reporting 6](#_Toc129100966)

[**Open the Security Tab** 6](#_Toc129100967)

[Report Archives 7](#_Toc129100968)

[**Open the Reports Tab (Under Compliance > Reports)** 7](#_Toc129100969)

[POLICY REPORTING 7](#_Toc129100970)

[**Show Policies (Compliance>Policies)** 7](#_Toc129100971)

[**Show Planner (Account>Planner)** 7](#_Toc129100972)

[ON-DEMAND QBR 7](#_Toc129100973)

[**Show QBR Report (Partner>Client)** 7](#_Toc129100974)

[ASSESSMENTS 8](#_Toc129100975)

[**Show Assessments (Compliance>Assessments)** 8](#_Toc129100976)

**Open a Demo-Ready Company in CloudRadial**

You need to perform the demo within a company inside of CloudRadial. You can do so within your own company or create one to perform the demo in. Alternatively, you can also choose to create a PowerPoint with screenshots as well.

**How Does Logging into the Portal Work?**

Your team will go to a customized URL [say your own URL, for example, portal.ACME.com] for your company and log in with their Office 365 credentials or an email token.

If applicable, a Google login will also be available for companies using Google Workspace.

**For All Users – The First 4 Tabs**

**Let's look at the tabs on the left**

**Home, Company, Support and the University tabs** will be the only tabs that a regular user will see.

* So, for right now, just ignore everything but the first 4 tabs.
* This is how we’re going to support the majority of people in the company.

From **Infrastructure down to Account** will be for those with elevated permissions – that’s where you’ll be able to see reports, Microsoft information, and other data that’s helpful from a decision-making standpoint.

The **Partner** tabis only visible to us, the IT provider.

* **Again, for right now, just ignore everything but the first 4 tabs.**

**Open the Company Tab**

**The Company tab has some productivity features for your company to help you get your day-to-day work done faster and more efficiently.**

* The application pages functions like a bookmarks page. You can add some bookmarks for the entire company, and each staff member can also add their own links at any time.
* There is also a shared company calendar, a directory, knowledge base and a messaging feature.
	+ You can add to knowledge base articles and messages as well as us. It’s yours to customize and use as you please.

**Open the University Tab**

From the get-go, you’ll have access to a wide variety of training courses for all of your staff.

With your portal, you get 35+ free courses from on mastering Microsoft 365 tools, as well as a few others.

* The portal has a built-in light weight training system so you can add courses to it for yourself. We can add courses in there for you, too.
* Training can help keep your team more secure and efficient, so don’t neglect it! The completion and progress is also tracked. You can review this progress further down in the portal – and we’ll get to it in a bit.

**(FAQs)**

* The calendar pulls in Office 365 calendars. You need to have Office connected in order for it to show up.
* The directory is a cleaned-up version of what we pull from the Usage > Users tab. The users there are based on what is found within PSA and/or O365
* The knowledge base is shared with the company (depending on their security roles) and the IT company. With the right permissions, both can put articles there.
* The messaging feature makes it easy for the MSP or the customer to communicate into to the users and company admins easily. There is also a mass update feature for the MSP

**Ticketing**

**Open the Support Tab**

The ticketing feature is very powerful and designed to provide you with maximum efficiency.

We separate IT issues in the **Report a Problem** tab and requests/orders in the **Request a Service** tab. However, they both function as tickets.

From the technical contract side,

* you can think of problem tickets (report a problem) as what's included in your contract.
* and request a service as things that are not.

**Open the Report a Problem Tab**

We try and make ticketing a self-triage environment so you can get the answers, or a fix that you need ,as fast as possible. If you identify the problem, we’ll ask the right questions to speed the process up.

* Instead of asking the same 5 questions over and over, with back and forth, using forms in the portal lets us end the back and forth and ask up front - It's better and faster support!

It’s up to you whether you want to show this next part – it’ll show the user how the forms are created and that you can customize them to their needs. If they’re not technical or aren’t interested, you can skip it.

**Click on the ADD link at the top right**

We can also further create customized forms for you that go straight to the best team to handle the issue.

**Click on the Routing Tab**

**This ticket routing is the key feature that that helps to optimize your time and efficiency.**

* Tickets are predefined here to go to the right team – something that’s not possible when you email, call, or text in a ticket. Not only is it more visible to us on our end – but it’s got all the right information so that we can solve the issue faster.
* We can also do approvals through here so you can set up workflows to be notified when a regular user is requesting something that you want to approve first, before it ever reaches us.

**Click on Request a Service**

This is where you can see all the things we can do for you**.**

The Service Catalog takes our services and puts them online for you at any time, like Amazon. Here, you can browse at your leisure so you can choose what you need at any time without needing to wait on certain people to be available and to get back to your email or phone calls.

* Here is where we showcase services, hardware, software, training and other "add ons" that we offer.
* The most popular feature among our clients is that they come here and push a button to onboard a new employee. (Show the add a new user/onboarding form)
* The customized questions come in very handy for your onboarding checklist to make sure we set up new employees perfectly without headaches.
* Just like the problem tickets, these are sent to the best team, can be customized, can go to approvers, etc.

**(FAQs): Tiles and their buttons can be customized.**

**Hardware and Software Assets**

**Open the Infrastructure Tab**

Now here’s something for the people in your office that need to see more (think company admins, points of contacts and management in the company).

Now you have the ability to see yourhardware and IT assets in one place, anytime you want.

* What you will find is that we emphasize transparency as a core value, and we want you to see what we see.

**Open the Endpoints Tab**

Here you can see company workstations at a glance and dig deeper if necessary.

It’s helpful for visual reference if you download a CloudRadial agent on at least one machine so you can show the audience what the information actually looks like.

Click into an endpoint

From here, you get a nice overview of the protection on this machine, the policy exceptions which I will show you in a minute, storage and location of the machine.

* I can also see if users are storing company data in Microsoft OneDrive, as an example of other information we can give
* This all becomes very transparent. If the company data isn't protected in company storage - it's not protected at all. And you should know and see that.

Now this information isn’t a secret – it’s out there for you to review whenever you want.

* If you think about it, there are IT policiesthat we put in place – the technical alignment piece to keep things running smoothly, on a technical level.
* But the business policies, which is what most businesses really care about – are up to you to decide. And this is how you can see if people are sticking to them.

**Open the Security Tab at the top of Endpoints**

This is section, and this tab specifically, is how you can tell how your staff is doing with OS updates, security, and more – something you can look into in basically real-time.

**Open the Performance Tab**

This area also shows your fast to slow machines, and we are going to wrap this up into charts so that you can see how your assets are preforming.

**Navigate to the Servers and Software tab under Infrastructure on the left-hand menus**

* And we do the same for Servers and Software. You can find out exactly who has what software either by searching or looking on an individual computer, at any time.

**Office 365 Assets**

**Open the Usage Tab**

This is another important asset that you now have available with ease - the Microsoft 365 Information – also known as where you’re actively spending money.

* This area can be your simplified **365 Admin Portal** and shows the same adoption, usage data as the Office admin portal – without needing to go to the cumbersome Microsoft Admin Center.
* You can easily see licensing information and who is using those licenses
* You can also see your company users.

**Backup/Security Reporting**

**Open the Security Tab**

This area’s usefulness depends on whether you have certain integrations hooked in (SkyKick and Datto Backup). Without them, you may want to skip over some of the talking points below.

**We want to keep things transparent and show you that we really are backing up your data.**

* So now in the security area, there is a visibility on Backup, Office 365 Backup, and email activity
* We pull in data from to show regular data backups and Office 365 backups
* The identity tabs shows emails that may have been exposed in data breaches
* We display the multi-factor authentication information there (if they have an Azure P1 license)

**(FAQs): Much of the information populating within the greater Security tab is dependent on a connection to Microsoft 365 for that company. Security > Identity will work for all companies with users loaded into them, but if you want to show more impressive things like email usage and MFA protection, you’ll need to connect Microsoft to the company that you’re demoing.**

**Report Archives**

**Open the Reports Tab (Under Compliance > Reports)**

You can find all kinds of reports within your report archives. Think of this as Dropbox for your reports.

* This is where you can view reports, alerts, logs, backup reports at any time, as soon as they’re available to us – again, all about transparency for what we do for you.
* It’s helpful if you can show them an example of an active report archive folder with reports in it so that they know what it looks like. Remember that HTML reports (solely sent by email) and those with .PDF attachments will open directly in the portal. All other file types will need to be downloaded first, and then can be opened.

Now, we can show you all the information that we have – without bothering you with it. It becomes easier to build plans and draw decisions from this data, as we’ll see in a little bit with the Planner.

**Policy Reporting**

**Show Policies (Compliance > Policies)**

This is where we take technical information and make it easy to understand.

* We have a policies report and it scans every night.
* This report is based on best practices and industry standards to help you benchmark your staff, equipment, and data to see where you need to focus on to become more secure, productive, compliant, and more.

Issues requiring attention will be flagged here as red or yellow. We can discuss these issues, their severity, and what to do about them at any time. This is typically what we’ll talk about during business reviews, as well as other suggestions from us to help you run leaner and more efficiently.

**Show Planner (Account > Planner)**

Now we are going to present all of this data back to you in a way that makes sense. This is the basis of our review sessions – and it’s how we keep things business focused without getting into the technical weeds.

* The planner is a place for us to collaborate on plans, suggestions, concerns, and budgets
* You can see what we’ve done for you, what we’re suggesting, what we will be doing for you, and even services that you’ve declined (and why). That way, we’re always on the same page.

Show Dashboards (Account > Dashboards)

And, to highlight our conversations in another way, you can also review a lot of this data within our built-in dashboards that pull in data in real time.