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Welcome

About this guide

Thank you for selecting UniView SaaS Backup powered by Spanning. Our mission is to ensure your customers' Microsoft 365, Google Workspace and Salesforce data is protected and always available for rapid restore to keep them up and running. We empower end users to correct their own mistakes, and give MSPs, application administrators, IT leadership and audit teams the confidence and proof that Microsoft 365, Google Workspace and Salesforce data is appropriately backed up, safe and ready for recovery.

Audience

This guide is intended for partners who use UniView to manage their customers' backups.

What's in this guide

This guide is organized to help you find the information you need to manage your SaaS Backups for Microsoft 365, Google Workspace and Salesforce through the SaaS Backup module within UniView. For details on how to administer Spanning Backup for Microsoft 365, see <https://spanning.com/downloads/SB0365-admin-guide.pdf>. For details on administering Spanning Backup for Google Workspace, see <https://spanning.com/downloads/SBGS-admin-guide.pdf>. For details on administering Spanning Backup for Salesforce, see <https://spanning.com/downloads/SBSF-admin-guide.pdf>.

Access Spanning SaaS Backup Module

Once you are logged into UniView, select “SaaS Backup” on the left navigation and you’ll be taken to the UniView SaaS Backup Overview page.

The screenshot shows the UniView SaaS Backup Overview page. The navigation menu on the left includes 'SaaS Backup', 'Summary', 'Overview', 'Customers', 'System', 'Endpoint Backup', and 'UniView'. The main content area is titled 'Overview' and features a success icon (a blue checkmark in a circle). Below the icon, the text reads 'UniView Spanning Backup' and 'Registered on 12/07/2021'. A table displays the following license statistics:

Total Customers	5
Contracted Standard Licenses	210
Allocated Standard Licenses	56
Available Standard Licenses	154
Contracted Archived Licenses	30
Allocated Archived Licenses	0
Available Archived Licenses	30

Two call-to-action boxes are present on the right side of the page:

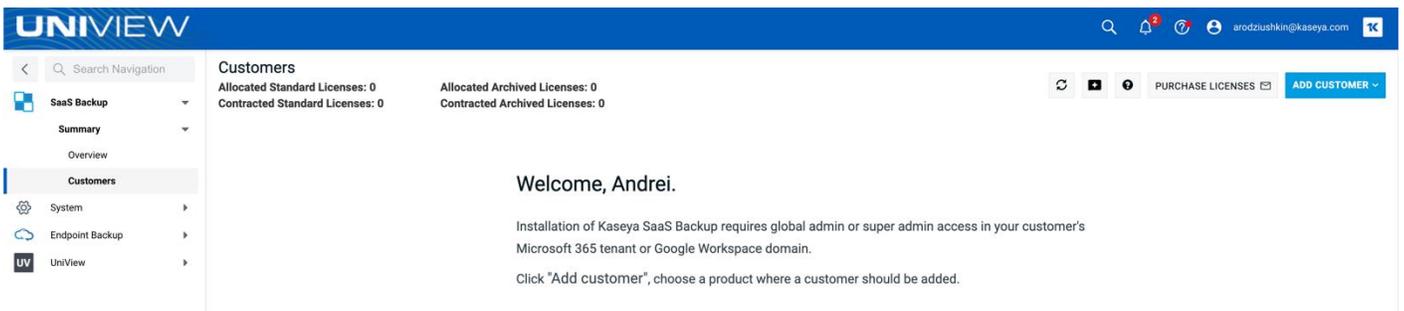
- Quick Start Guide**: Get all the information you need to get Spanning Backup set up for your customers. →
- Learn More**: Spanning Backup ensures that your customer's data is protected, available and recoverable. →

Adding Customers

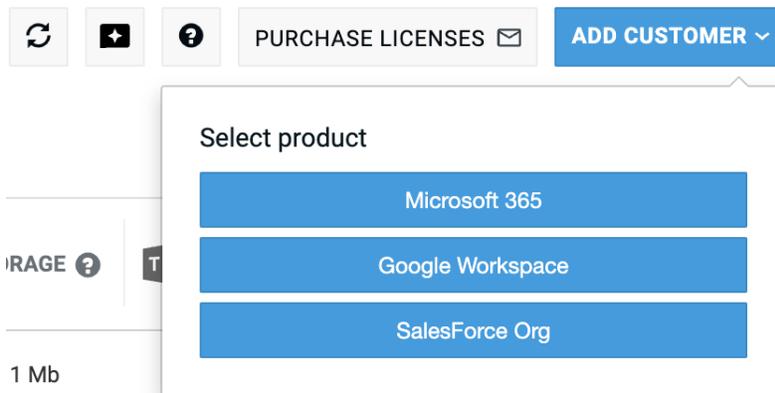
Customers and prospects can be added to your SaaS Backup module by installing Spanning Backup for Microsoft 365, Spanning Backup for Google Workspace or Spanning Backup for Salesforce using the custom link provided. Tenants who have never installed Spanning Backup will automatically start a 14-day free trial. Existing Spanning Backup tenants will be associated with your UniView account and become visible in the module.

To add customers:

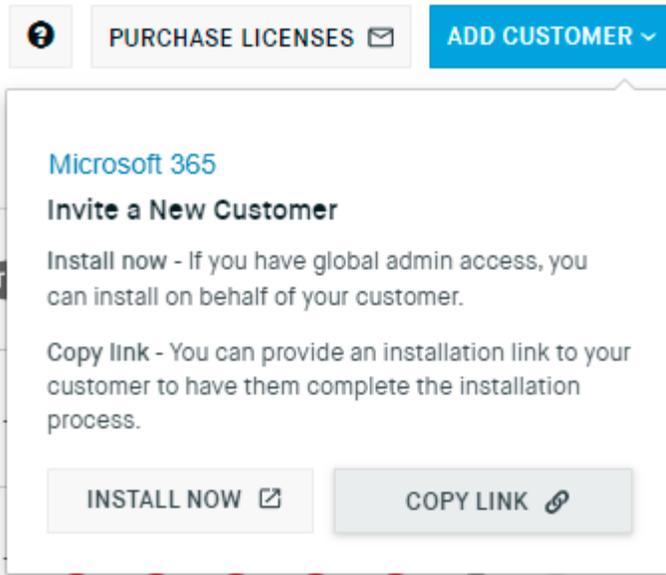
1. Click “Customers” in the left navigation.
2. If you don’t yet have customers associated, you’ll be taken to the page below.



3. Click **Add Customers** and choose Microsoft 365, Google Workspace or Salesforce as the product.



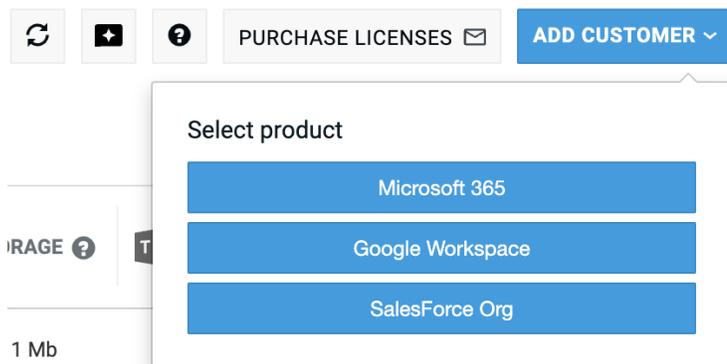
4. Choose Copy Link to place your unique link and id on the clipboard.



- a . For Spanning Backup for Microsoft 365: Provide the custom link to your customer and have them install Spanning Backup for Microsoft 365 using a global admin account, or if you have access to a global admin account in your customer’s tenant you can install on their behalf.
 - b . For Spanning Backup for Google Workspace: Provide the custom link to your customer and have them install Spanning Backup for Google Workspace using a super admin account, or if you have access to a super admin account in your customer’s tenant you can install on their behalf.
 - c . For Spanning Backup for Salesforce: Provide the custom link to your customer and have them install Spanning Backup for Salesforce using a system admin account with API access enabled, or if you have access to system admin account in your customer’s tenant you can install on their behalf.
5. Once the installation is complete, the customer will be displayed in the customer list screen on either the Microsoft 365 tab, the Google Workspace tab, or the Salesforce tab.

Adding Additional Customers

You can add additional customers at any time by selecting the “Add Customer” button and select the appropriate product.



Each product has a unique URL but uses the same unique code for your UniView instance.

The image displays three panels from the UniView interface, each representing a different product. Each panel has a consistent layout:

- Navigation Bar:** A grey bar on the left contains a help icon and the text "PURCHASE LICENSES" with an envelope icon. A blue bar on the right contains the text "ADD CUSTOMER" with a dropdown arrow.
- Product Name:** The product name is displayed in blue text at the top of the panel.
- Section Header:** Below the product name is the section header "Invite a New Customer".
- Instructions:** Two paragraphs of text provide instructions for installation. The first paragraph is labeled "Install now" and the second is labeled "Copy link".
- Action Buttons:** At the bottom of each panel are two buttons: "INSTALL NOW" with an external link icon and "COPY LINK" with a link icon.

The three panels shown are for Microsoft 365, Google Workspace, and Salesforce Org.

There are two options depending on your installation preference. **Install Now** will redirect you to the product portal and initiate the installation process. **Copy Link** will send a link to the clipboard for you to use in an in-private browser session or to send in an email to your customer.

Managing Customers

To view all customers associated to your account, click on the “Customers” tab in the left navigation window. Choose the tab for either Microsoft 365, Google Workspace or Salesforce. Each customer entry will include their tenant name, the number of paid licenses, the license coverage of their tenant, the expiration date of their trial or active subscription, and the status of the last backup.

The screenshot shows the UNIVIEW interface with the 'Customers' tab selected. The left navigation pane includes 'SaaS Backup', 'Summary', 'Overview', 'Customers', 'System', 'Endpoint Backup', and 'UniView'. The main content area displays a table of customers under the 'Microsoft 365' tab. The table has columns for 'COMPANY NAME', 'STANDARD LICENSES', 'ARCHIVED LICENSES', 'EXPIRATION', and 'LICENSE COVERAGE'. There are also icons for storage, backup, and other actions.

COMPANY NAME	STANDARD LICENSES	ARCHIVED LICENSES	EXPIRATION	LICENSE COVERAGE
Mo's Computer	16	0	10/14/2025	3% 0%
SharePoint Dog	8	0	10/14/2025	9% 0%
Unifrends USA	14	0	10/14/2025	80% 0%

This screenshot shows the UNIVIEW interface with the 'Customers' tab selected. The left navigation pane is the same as in the previous screenshot. The main content area displays a table of customers under the 'Microsoft 365' tab. The table has columns for 'COMPANY NAME', 'STANDARD LICENSES', 'EXPIRATION', and 'LICENSE COVERAGE'. There are also icons for backup, storage, and other actions.

COMPANY NAME	STANDARD LICENSES	EXPIRATION	LICENSE COVERAGE
spanningdemoinc.com	11	10/15/2025	100%

This screenshot shows the UNIVIEW interface with the 'Customers' tab selected. The left navigation pane is the same as in the previous screenshots. The main content area displays a table of customers under the 'SalesForce Org' tab. The table has columns for 'COMPANY NAME', 'STANDARD LICENSES', 'EXPIRATION', and 'LICENSE COVERAGE'. There are also icons for backup, storage, and other actions.

COMPANY NAME	STANDARD LICENSES	EXPIRATION	LICENSE COVERAGE
Spanning Demo	7	03/24/2050	64%

To view details about your customers' backup installation, click on a customer row and a details blade will expand with additional details about the tenant. The details blade contains the controls to change license allocation and the detailed 7-day history of backups for Teams, SharePoint, OneDrive, Mail, Calendar, and Contacts for Microsoft 365. For Google Workspace the status is for Sites, Drive, Mail, Calendar and Contacts. For Salesforce the status for entire organization.

The screenshot displays the UNIVIEW interface. On the left is a navigation menu with options like SaaS Backup, Summary, Overview, Customers, System, Endpoint Backup, and UniView. The main area shows a 'Customers' table with columns for Company Name, Standard Licenses, Archived Licenses, Expiration, License Coverage, and Storage. The 'Unifrends USA' row is highlighted. A details blade for 'Unifrends USA' is open, showing the following information:

- EXTERNAL ID:** 294003e3-d8ae-4033-9035-09317e3462a4
- SPANNING REGION:** US - United States
- EXPIRATION:** 10/14/2025
- MICROSOFT USAGE REPORT:**
 - Mailbox Storage: 1.5 Gb
 - OneDrive Storage: 4 Gb
 - SharePoint Storage: 959.6 Mb
- SPANNING USAGE REPORT:**
 - Total Protected: 12.8 Gb
 - Total Stored: 9.8 Gb
- SHAREPOINT BACKUP:** DISABLE (Active)
- LICENSE COVERAGE:** (Dropdown menu)
- BACKUP HISTORY:** A grid showing backup status for Teams, OneDrive, Mail, Calendar, and Contacts over 7 days, with all cells containing green checkmarks.

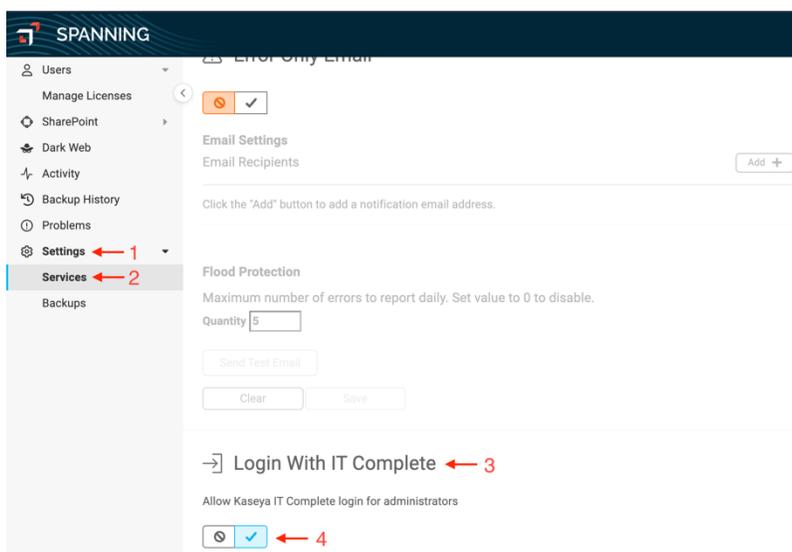
Configure IT Complete Single Sign-On

Initially, access to the customer's Spanning Backup tenant is controlled with Microsoft Azure AD credentials for Microsoft 365, Google credentials for Google Workspace, and Salesforce credentials for Salesforce. To install and manage a Spanning Tenant, you must be a tenant administrator (Global Administrator for M365, super administrator for Google or system administrator for Salesforce) or Spanning Administrator. To manage a customer's Spanning Backup, click **Connect to Product** link from the customer list, or from within the details pane. Clicking the **Connect to Product** button will open a new browser tab and you will be prompted for Microsoft or Google Credentials. Once you authenticate to the tenant you have the option of configuring **Kaseya IT Complete Single Sign-On** for the tenant.

Configure IT Complete Single Sign-On in Spanning Backup for Microsoft 365

Once you have authenticated as a Global or Spanning Administrator to the Spanning Backup for Microsoft 365 tenant, you can optionally configure IT Complete Single Sign-On. Navigate to **Settings | Services** and scroll to the section **Login with IT Complete**.

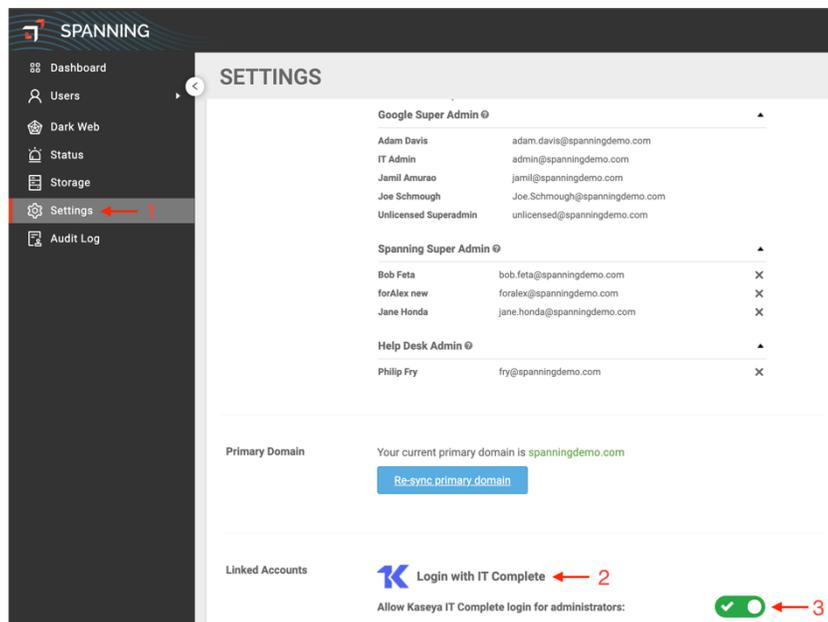
Enabling the feature will allow the UniView Administrator access to the Spanning tenant without providing Microsoft Credentials. The Administrator's UniView Username will be used for all audit activity. Once configured, an administrator can click Connect to Product and pass the UniView login to Spanning Backup for Microsoft 365 enabling you to manage your customers tenant without a separate login.



Configure IT Complete Single Sign-On in Spanning Backup for Google Workspace

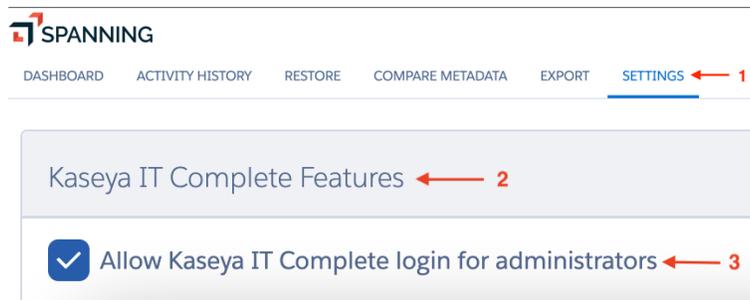
Once you have authenticated as a Super Admin or Spanning Administrator to the Spanning Backup for Google Workspace domain, you can optionally configure IT Complete Single Sign-On. Navigate to **Settings | Services** and scroll to the section **Login with IT Complete**.

Enabling the feature will allow the UniView Administrator access to the Spanning domain without providing Google Credentials. The Administrator's UniView Username will be used for all audit activity. Once configured, an administrator can click Connect to Product and pass the UniView login to Spanning Backup for Google Workspace enabling you to manage your customers domain without a separate login.



Configure IT Complete Single Sign-On in Spanning Backup for Salesforce

Once you have authenticated as a Spanning Administrator to the Spanning Backup for Salesforce organization, you can optionally configure IT Complete Single Sign-On. Navigate to **Settings | Services** and scroll to the section **Login with IT Complete**.



Enabling the feature will allow the UniView Administrator access to the Spanning organization without providing Salesforce Credentials. The Administrator's UniView Username will be used for all audit activity. Once configured, an administrator can click Connect to Product and pass the UniView login to Spanning Backup for Salesforce enabling you to manage your customers domain without a separate login.

Spanning SaaS Backup Support

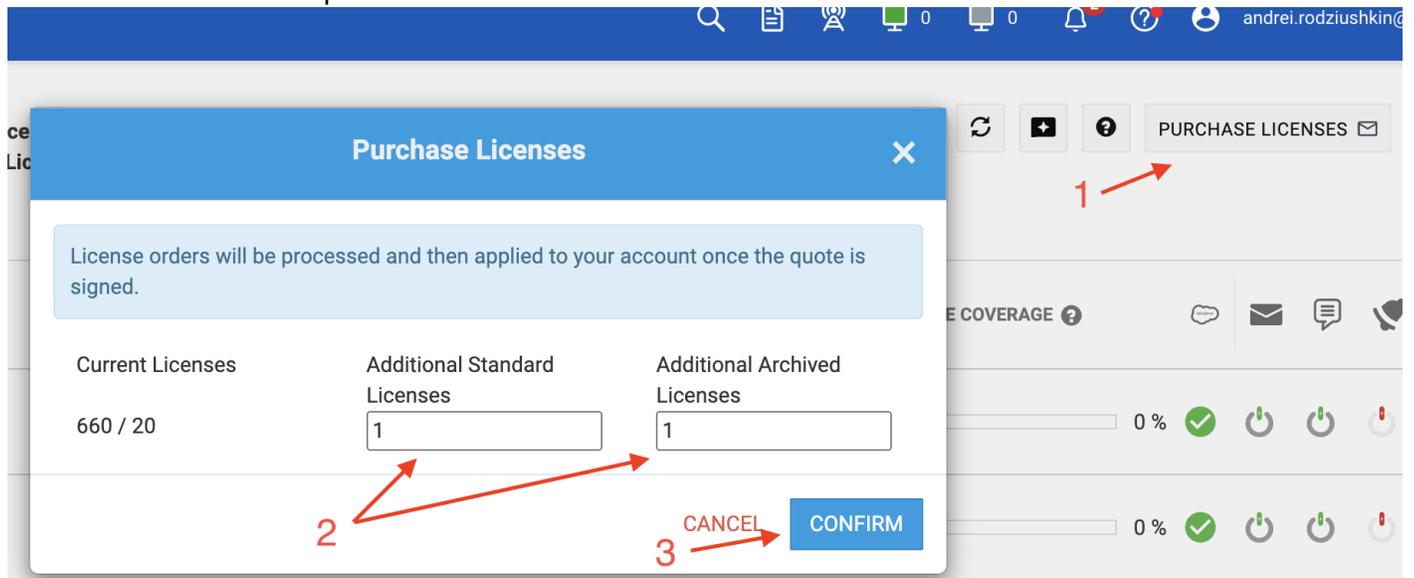
Important: For an in-depth guide on how Spanning Backup for Microsoft 365 works, please find the Administrator guide located [here](#). For an in-depth guide on how Spanning Backup for Google Workspace works, please find the Administrator guide located [here](#). For an in-depth guide on how Spanning Backup for Salesforce works, please find the Administrator guide located [here](#).

Licensing

Purchase Licenses

In order to purchase licenses for Spanning Backup, please contact your Kaseya sales associate. Alternatively, you may request additional licenses from within the UniView module by:

1. Click the Purchase Licenses button.
2. Enter the number of licenses that you require.
3. Click Confirm to purchase the additional licenses.



Allocate Licenses to Customers

License Allocation per Spanning tenant is controlled in the customer details pane. Select a customer and view the details pane.

You may allocate licenses to customers who are not in Trial status. Trial customers must be Upgraded to Paid before you can allocate licenses.

Adjust the license allocation in the selector. You may adjust the license allocation up as high as you like for customers that are adding users. (Without exceeding your total license allocation.) You may only decrease the allocation down to the number of Licenses in Use in a tenant.

As you make changes your updates are recorded at the bottom of the screen.

CHANGES (1) 658/660 16/20

Once you complete your changes click **Submit** to send the request to Kaseya. Your changes should become effective in 24 hours.

License pool is available for Spanning Backup for Microsoft 365 and Spanning Backup for Google Workspace. It is not available for Spanning Backup for Salesforce.

Spanning Cloud Apps LLC

EXTERNAL ID
0262da8d-8e28-4215-a854-18a518bbf925

SPANNING REGION
US - United States

EXPIRATION
07/31/2026

MICROSOFT USAGE REPORT

Mailbox Storage	13.3 Gb
OneDrive Storage	3.2 Gb
SharePoint Storage	5.8 Gb

SPANNING USAGE REPORT

Total Protected	111.2 Gb
Total Stored	85.5 Gb

SHAREPOINT BACKUP **DISABLE**
Active

LICENSE COVERAGE

85%
1050%

10%
50%

Total Users	20
Standard	
Total Tenant Licenses	210
Licenses In Use	17
Licenses Available	193
Add/Remove Licenses	<input type="text"/>
New Total	210

0 **Archived** 20

Total Tenant Licenses	10
Licenses In Use	2
Licenses Available	8
Add/Remove Licenses	<input type="text"/>
New Total	10

0 20

Trial Conversion

You may now request the conversion of a customer trial to a paid subscription in the Customer detail pane.

1. Select a Customer that is currently in Trial status.
2. On the Customer details pane next to the Trial indicator choose **Upgrade**.
3. Adjust the license allocation as needed.
4. Click **Submit**.

The screenshot shows the 'New Mail LLC' customer detail pane. At the top, there is a 'TRIAL EXPIRED' indicator and an 'UPGRADE' button with a red arrow pointing to it. Below this, the pane displays various metrics: EXTERNAL ID (9f49dae9-cae4-47e6-8dc1-cdd6e4f700f0), SPANNING REGION (AP - Australia), EXPIRATION (04/12/2023), SPANNING USAGE REPORT (Total Protected: 167.9 Mb, Total Stored: 128.9 Mb), and SHAREPOINT BACKUP (Active). The 'LICENSE COVERAGE' section shows two donut charts: one for 'Standard' licenses (18% / 909%) and one for 'Archived' licenses (0% / 0%). Below these charts, there are input fields for 'Add/Remove Licenses' with values of 25 for Standard and 0 for Archived. At the bottom, there are 'CANCEL' and 'SUBMIT' buttons, with a red arrow pointing to the 'SUBMIT' button.

This screenshot provides a closer look at the 'LICENSE COVERAGE' section of the customer detail pane. It features two donut charts: the first for 'Standard' licenses showing 18% (909%) and the second for 'Archived' licenses showing 0% (0%). Below the charts, the following data is displayed:

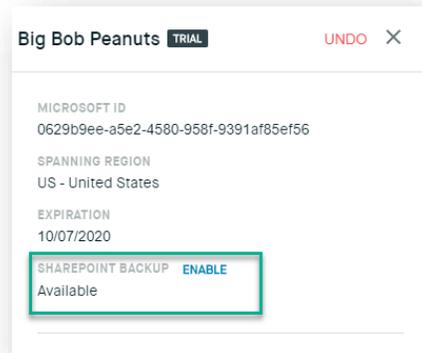
Standard	
Total Users	11
Total Tenant Licenses	100
Licenses In Use	2
Licenses Available	98

Below this, there is a slider for 'Archived' licenses, currently set at 0 out of 11. The data for 'Archived' licenses is as follows:

Archived	
Total Tenant Licenses	0
Licenses In Use	0
Licenses Available	0

Enable SharePoint Backups

SharePoint backup can be enabled by selecting Enable in the SharePoint Backup Section for Microsoft 365 customers.



Helpful Resources

Knowledge Base

Search through articles in the Spanning Knowledge Base at <https://helpdesk.kaseya.com> to find answers to the most common user questions for Spanning Backup for Microsoft 365, Spanning Backup for Google Workspace, Spanning Backup for Salesforce.

Email Support

If you can't find the answer to your question or need further help, please don't hesitate to contact us via email at kaseyasupport@spanning.com.

Privacy

Spanning takes privacy seriously. Read our Privacy Policy at <https://spanning.com/privacy-statement/>.

Security

Spanning Backup employs multiple layers of operation and physical security to ensure the integrity and safety of your data. Read how we protect your data at <https://spanning.com/data-protection-security/>.

About Spanning

Spanning Cloud Apps, a Kaseya Company, is the leading provider of backup and recovery for SaaS applications, protecting thousands of organizations from data loss due to user error, malicious activity and more. We are the only global provider of powerful, enterprise-class data protection for Microsoft Office 365, Google Workspace, and Salesforce. With data centers located in North America, the EU, Australia, Canada and the UK Spanning is the most trusted cloud-to-cloud backup provider with millions of users around the world.