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JetStreamVS

Quick Start Guide

Trials

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Introduction

This is an optional feature that gives you, the solution provider, the option of having limited-time trial accounts. This feature allows users to signup by themselves and begin using it right away. Trials can be set to last for a custom amount of time before they reach the expiration date. After the expiration date the trial accounts go into a hibernation mode which blocks the user from using the account, but if they choose to convert into a paid account, they can contact support to re-activate.

The admin is able to set or disable certain features of the platform for trial accounts to incentivize the user to upgrade to a paid production plan. Plans can be easily changed at the moment of the conversion from the trial account to the full managed subscription if the user if the user decides to upgrade.

Self Sign-Up Trials

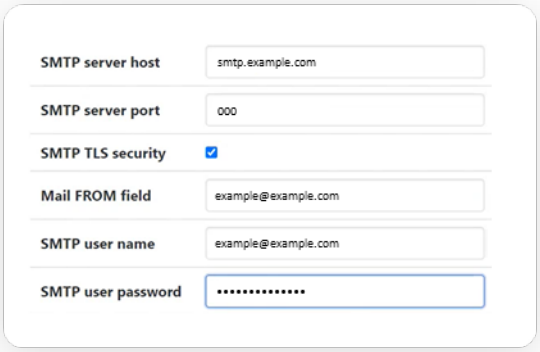
Getting started with Trials

1. Set Up Emailer in Realm Admin

Start by logging into the Realm Admin profile then open the tab **Email Configurations** at the top of the page.

The Email Server Configurations form will appear as in *Figure 1*.

Figure 1



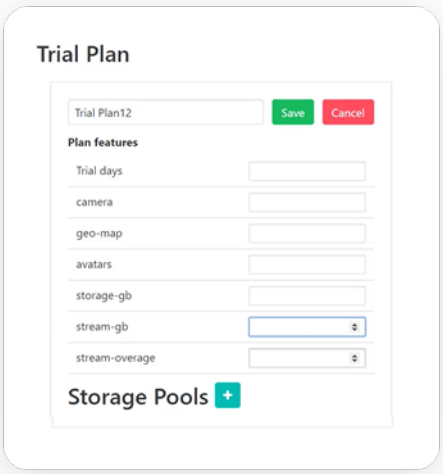
Once all the fields have the correct information entered into the fields, press the Save and Validate button. This will send a validation email to the email entered before. Go to your inbox and press the validation link. After pressing the link, it will forward you back to the configuration page. If validated correctly the status in the top right of the page should read ACTIVE.

NOTE: *If you do not configure the emailer, the 'Activate a free trial account' function will be unavailable*

2. Creating the Trial Plan

Open the **Plans** tab at the top of the page. Scroll down to the Trial Plan section and press **Edit**.

Figure 2



Enter a trial plan name and select the features needed across all trials. *Figure 2*

To add a Storage Pool, press the "**+**" button. Press **Edit** to enter desired name and pool types

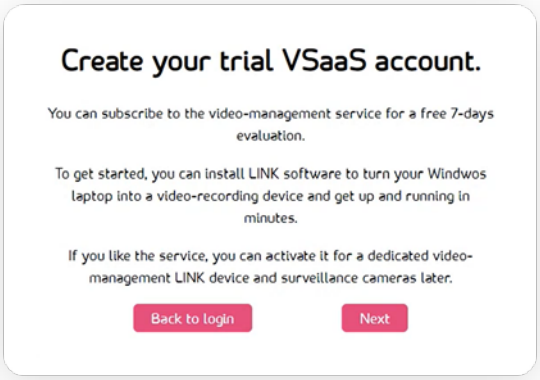
Press the Save to save the trial plan

3. Creating a Trial Account

Logout of the admin profile and go to the login page. You should see the "Activate a free trial account" link next to the Login button.

NOTE: *If the link is not there look over the admin email configurations again*

Figure 3

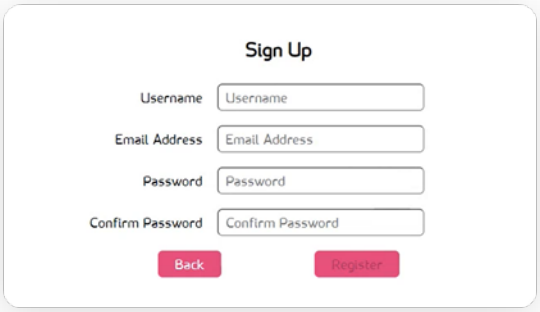


Press the "Activate a free trial account" link, this prompt should appear, *Figure 3*

Press Next to continue the trial creation

The Sign-Up page will appear, *Figure 4*. Enter the appropriate information in the fields provided, then press the Register button to continue

Figure 4



IMPORTANT NOTE: *One e-mail is equivalent to one realm, i.e. there cannot be several trial accounts with one e-mail*

A window confirming the trial account creation will appear. Press the Login button, it will forward you back to the Login page. You will now need to go to your email inbox to activate the account through a link that was sent to it

NOTE: *This will be a separate email, NOT the same link from the prior validation email. Check your spam folder if it does not appear*

After pressing the emailed link, a new window will appear saying that that account has been activated. Return to the Login page

Login to the new trial account, accept the EULA, and your trial account is all setup!

4. Subscription Type Management

Now that the trial subscription has been activated the admin is able is able to control the subscription type. If the client would like to extend their trial or become a paid production user, the next steps will show how to do it.

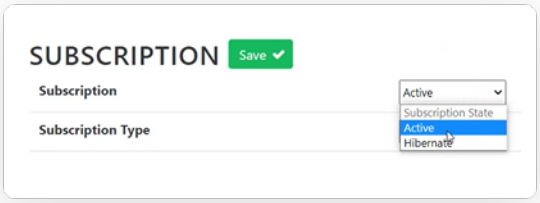
To change or view the current subscription type, login to the realm admin profile. Then on the top of the page select the **Realm** tab. A Realm List will appear with all available realms in the system. Select the desired Realm in which you would like to edit. Scroll down to the Subscription Section of the page.

NOTE: *TRIAL - is a time period free trial account (self-created by users). After this period expires, the account goes into the HIBERNATE state.*

Active/Hibernate Trial

Under the subscription section press the Edit button to edit the subscription preferences. Under the subsection "Subscription" there is the option to keep the account in an Active or Hibernate State. Selecting the Active state will leave the account in the normal live status, while selecting the Hibernate state will put the account in a deactivated state that will block it from being accessible. *Figure 5*

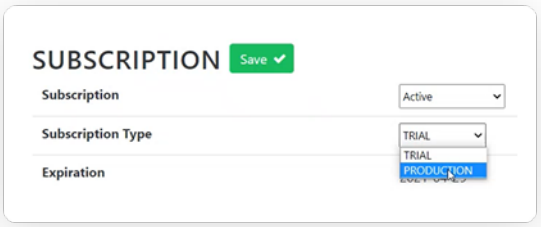
Figure 5



Production Subscription Type

If the client would like to upgrade their trial plan to a paid plan, select the PRODUCTION option under Subscription Type. The account will now have full access to all features. *Figure 6*

Figure 6



IMPORTANT NOTE: *Once the trial account is switched and saved from a Trial account to a Production account, the action cannot be undone*

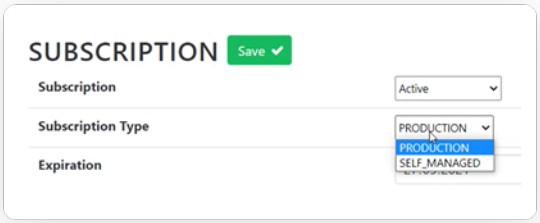
Self Managed Subscription Type

This type of subscription type will only show up for users that were inputted to the system manually (not through the user setup free trial). A Self Managed subscript-

Ion is a free trial account for 14 days (created by super admin in Realm Admin). This value can be given to realms that have already been created in the system (for the convenience of defining users by clients). After this period expires, the account goes into the HIBERNATE state. *Figure 7*

NOTE: *When making any changes to the subscription, be sure to save the changes*

Figure 7



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