PartnerVault Partner Guide

Welcome to PartnerVault, Upic Solutions' secure document management portal. This guide walks you through everything available to you as a Partner Admin.

What is PartnerVault?

PartnerVault is your dedicated, secure portal for managing the relationship between your organization and Upic Solutions, all in one place. From accessing delivered documents to tracking support ticket trends, monitoring software licenses, and reviewing your billable usage, PartnerVault puts the tools you need at your fingertips. Everything is encrypted, access-controlled, and built to give you real-time visibility into the services Upic manages on your behalf.

Think of PartnerVault as your command center. Instead of juggling emails, spreadsheets, and phone calls to stay on top of your managed services, you get a clean, modern dashboard that keeps your team informed and in control. Whether you're adding a colleague, reviewing quarterly support trends, or downloading the latest deliverables, PartnerVault makes it fast, simple, and secure.

> **A note on Beta features:** PartnerVault is actively evolving, and several features are currently in Beta. Beta features are enabled on a per-partner basis by Upic Solutions, so not every Beta feature is available to every partner. When enabled, Beta features appear in your navigation with a **Beta** badge. If you're interested in a Beta feature that isn't currently enabled for your organization, contact your Relationship Manager.

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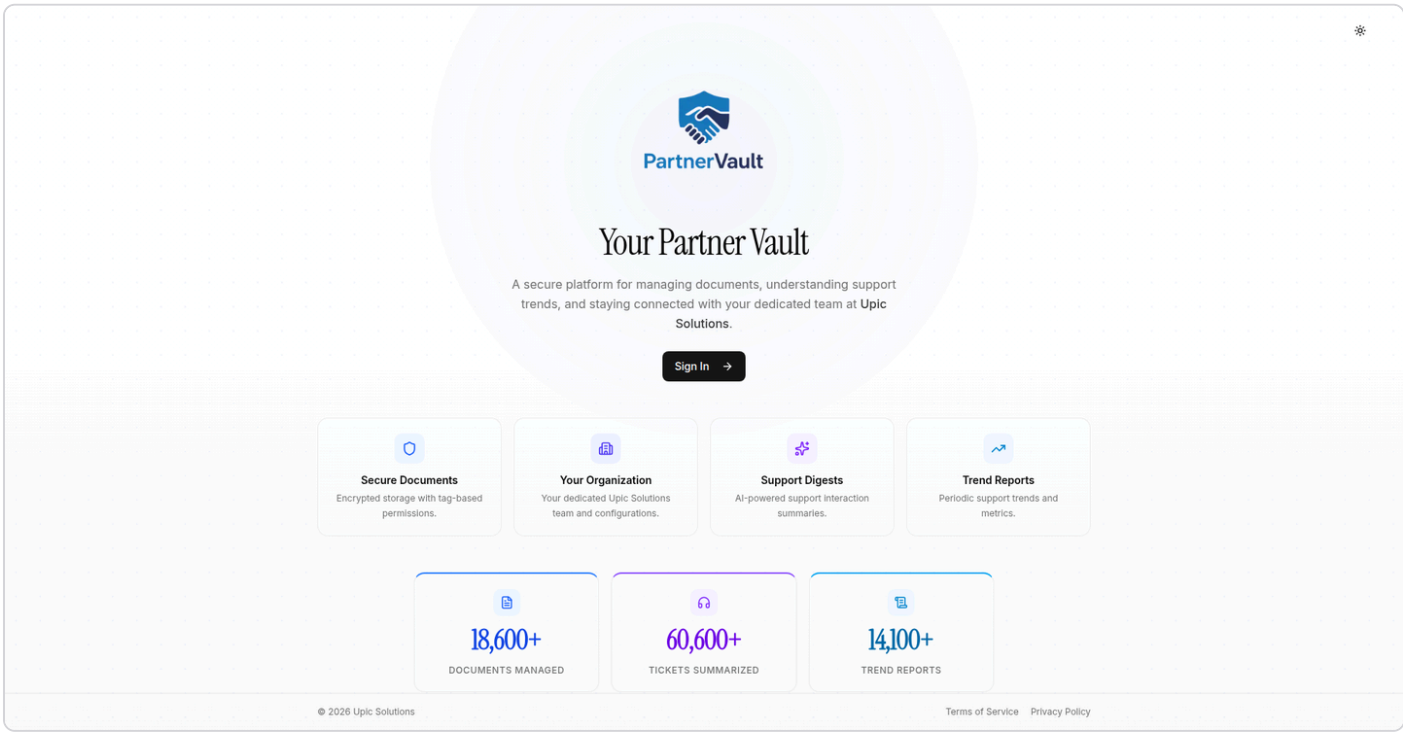
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Signing In

PartnerVault uses **passwordless email login**, so there is no password to remember. Each time you sign in, PartnerVault emails you a one-time 6-digit code.

Step 1: Open PartnerVault

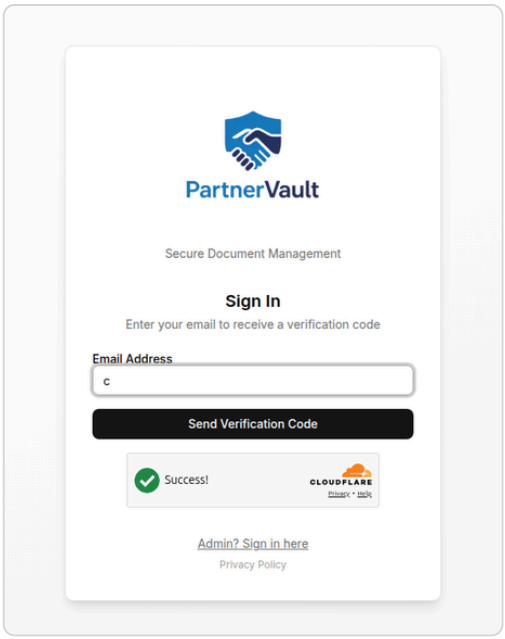
Go to **https://partnervault.upicsolutions.org** and click **Sign In**.



PartnerVault home page with the Sign In button

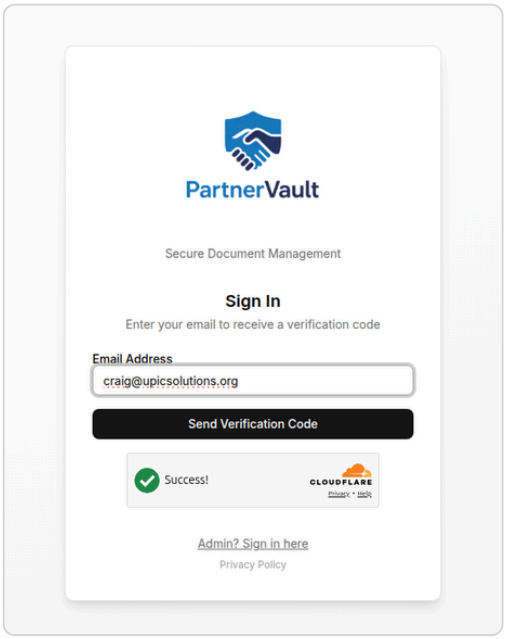
Step 2: Enter your email address

Type the email address Upic Solutions has on file for you.



Sign-in page with an empty email field

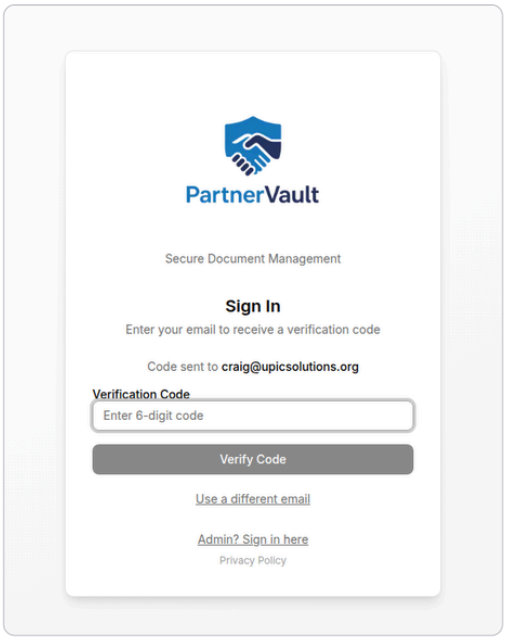
Below the field, a quick security check runs automatically. Wait for the green **Success!** check mark, then click **Send Verification Code**.



Email entered, security check passed, and Send Verification Code enabled

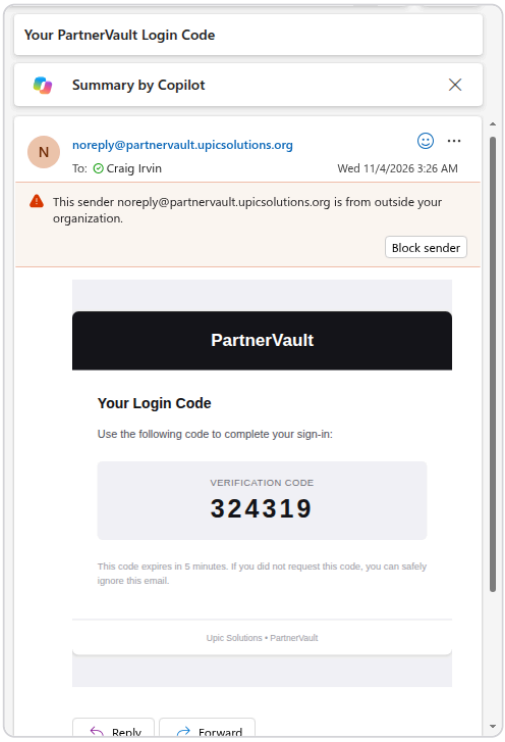
Step 3: Check your email for the code

The page changes to show **Code sent to** your address and a box for the code.



Verification code entry screen

Within a few seconds you'll get an email from `noreply@partnervault.upicsolutions.org` with the subject **Your PartnerVault Login Code**. Your email program may label it as coming from outside your organization. That's expected.

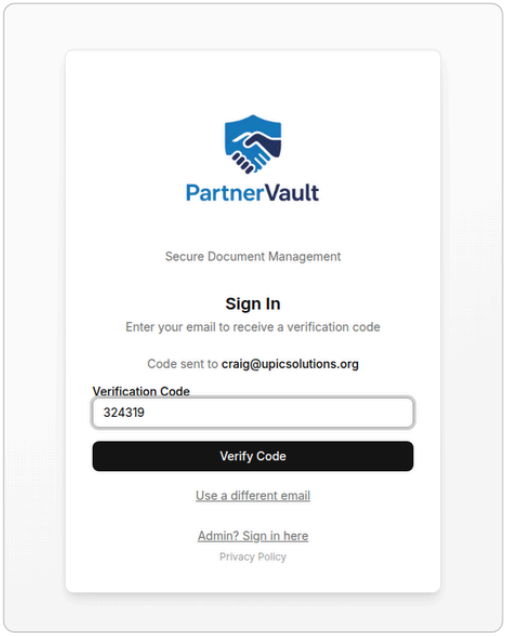


The PartnerVault login code email

> **The code expires 5 minutes after it's sent** and works only once. If it expires, click **Use a different email**, enter your address again, and request a new code.

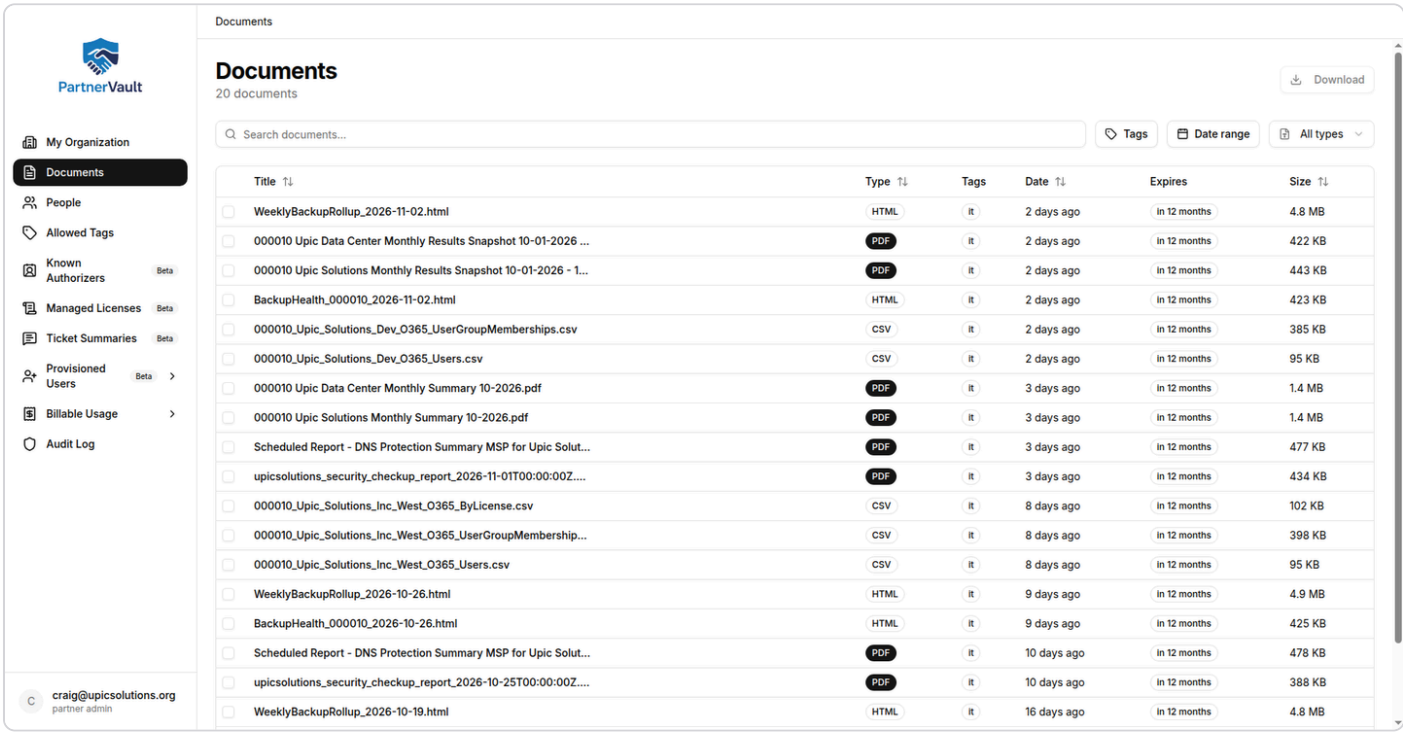
Step 4: Enter the code

Type the 6-digit code into **Verification Code** and click **Verify Code**.



Code entered on the sign-in page

You're taken straight to **Documents**. The menu on the left lists everything available to your organization, and your email and role appear at the bottom.



Documents page after signing in

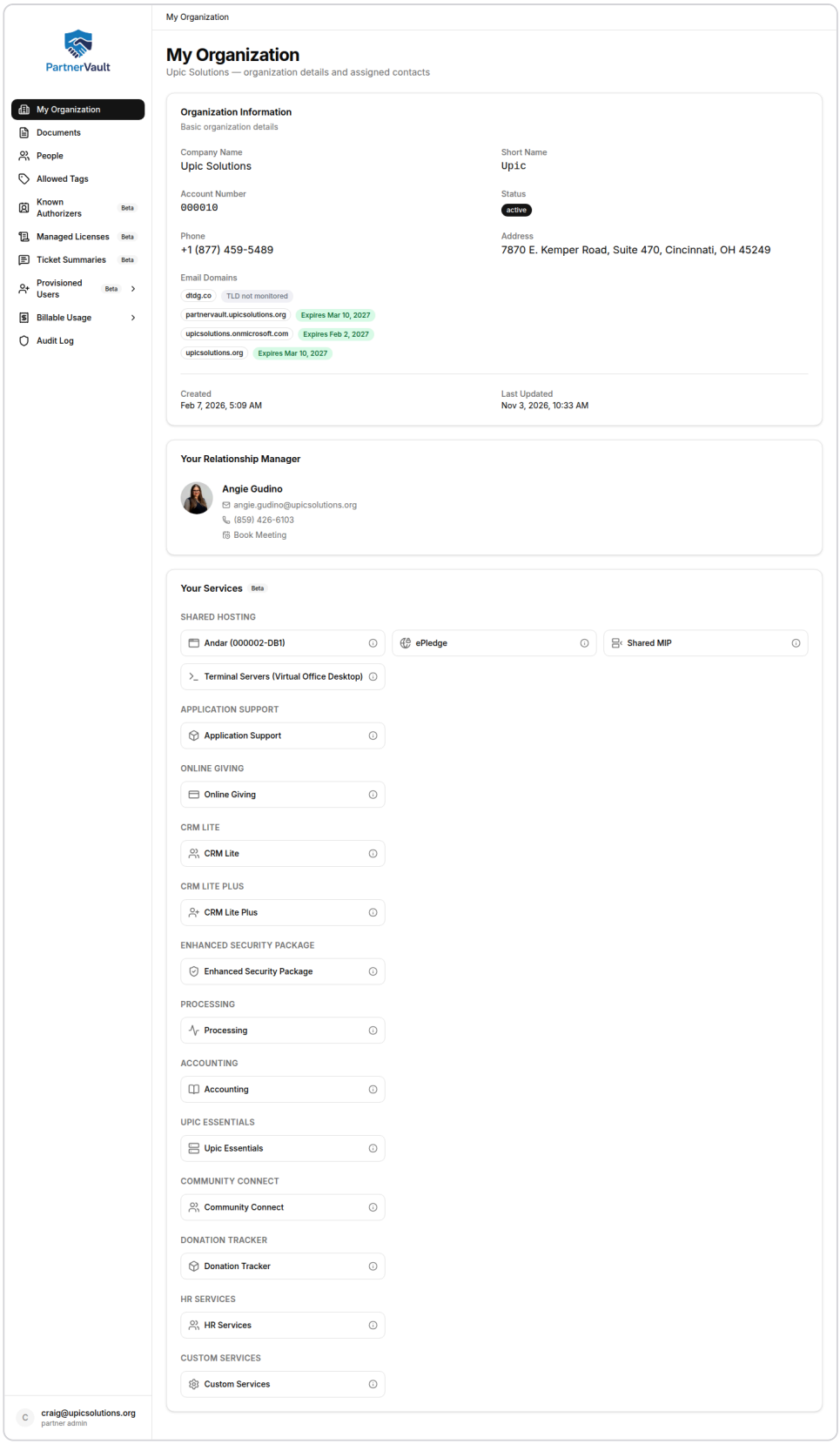
Your session lasts **24 hours**. When it expires, sign in again with a new code.

Troubleshooting

- **No email after a minute?** Check your junk or spam folder and any quarantine your IT team uses. Then click **Use a different email** and confirm the address is spelled correctly.
- **The Send Verification Code button stays greyed out?** The security check hasn't finished. Wait for the green check mark, or refresh the page.
- **"Admin? Sign in here"** is for Upic Solutions staff only. Partners always use the email code.

My Organization

My Organization shows your company's profile in PartnerVault, your Upic contact, and the services Upic manages for you. The page is read-only. To change anything on it, contact your Relationship Manager.



My Organization page

Organization Information

- **Company Name**, **Short Name**, and **Account Number**
- **Status**: Active or Disabled
- **Phone** and **Address**
- **Email Domains**: the domains your users' email addresses must come from. Each domain shows its registration expiry date (for example, *Expires Mar 10, 2027*). Upic monitors these dates and emails your contacts before a domain expires. Domains Upic can't look up show *TLD not monitored*.
- **Created** and **Last Updated** dates

Your Relationship Manager

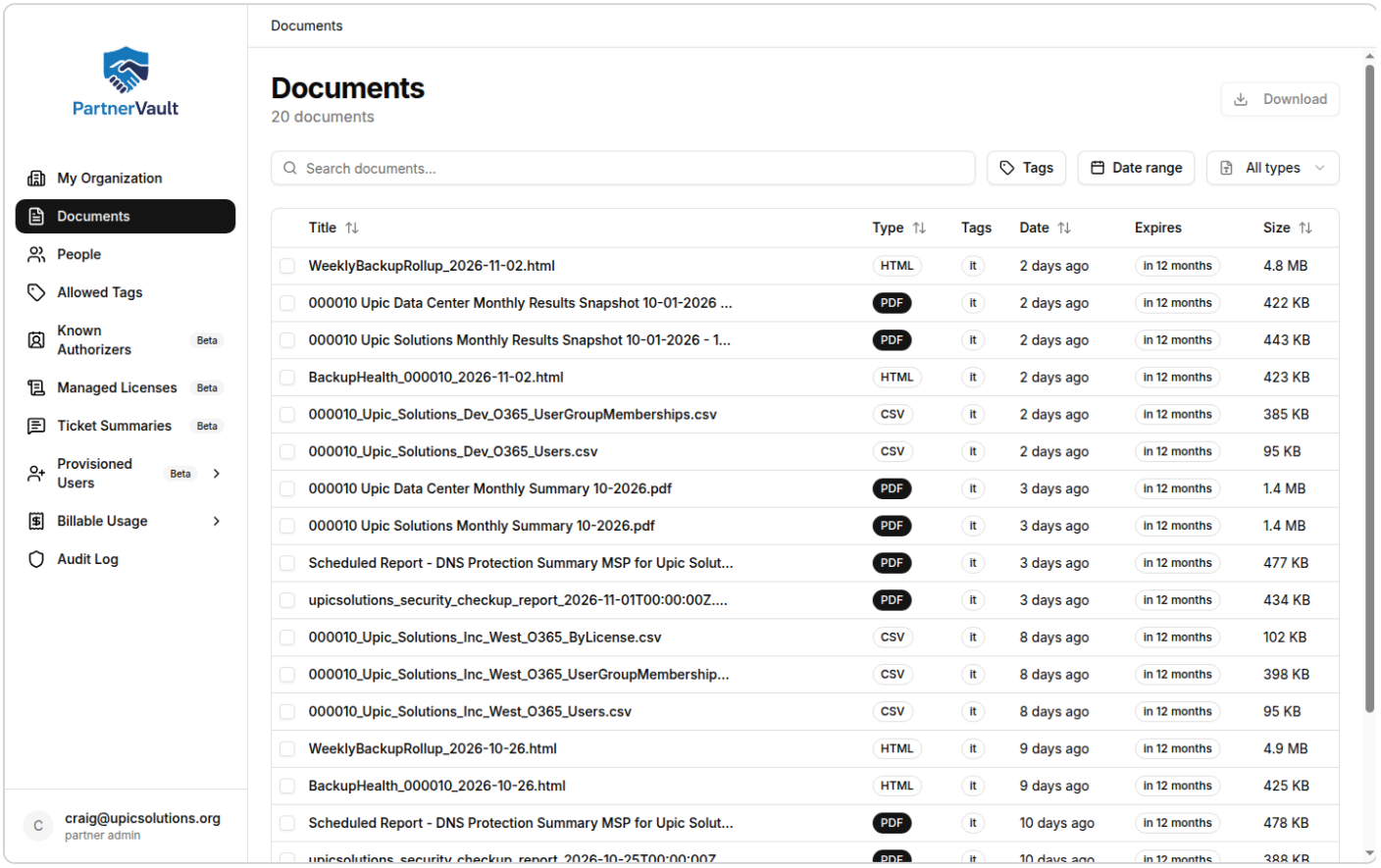
Your assigned Upic contact, with their email, phone number, and a **Book Meeting** link to their calendar.

Your Services *(Beta)*

The services Upic manages for your organization, grouped by category (for example, Shared Hosting, Online Giving, Accounting). Click the ⓘ icon on any service for a short description.

Documents

Documents is where you find the files Upic Solutions has delivered to your organization. It's the first page you see after signing in.



Documents list

The document list

Each row shows:

- **Title**: the file name
- **Type**: PDF, CSV, HTML, and so on
- **Tags**: the category the document belongs to
- **Date**: when it was delivered
- **Expires**: when PartnerVault will remove it, usually 12 months after delivery
- **Size**

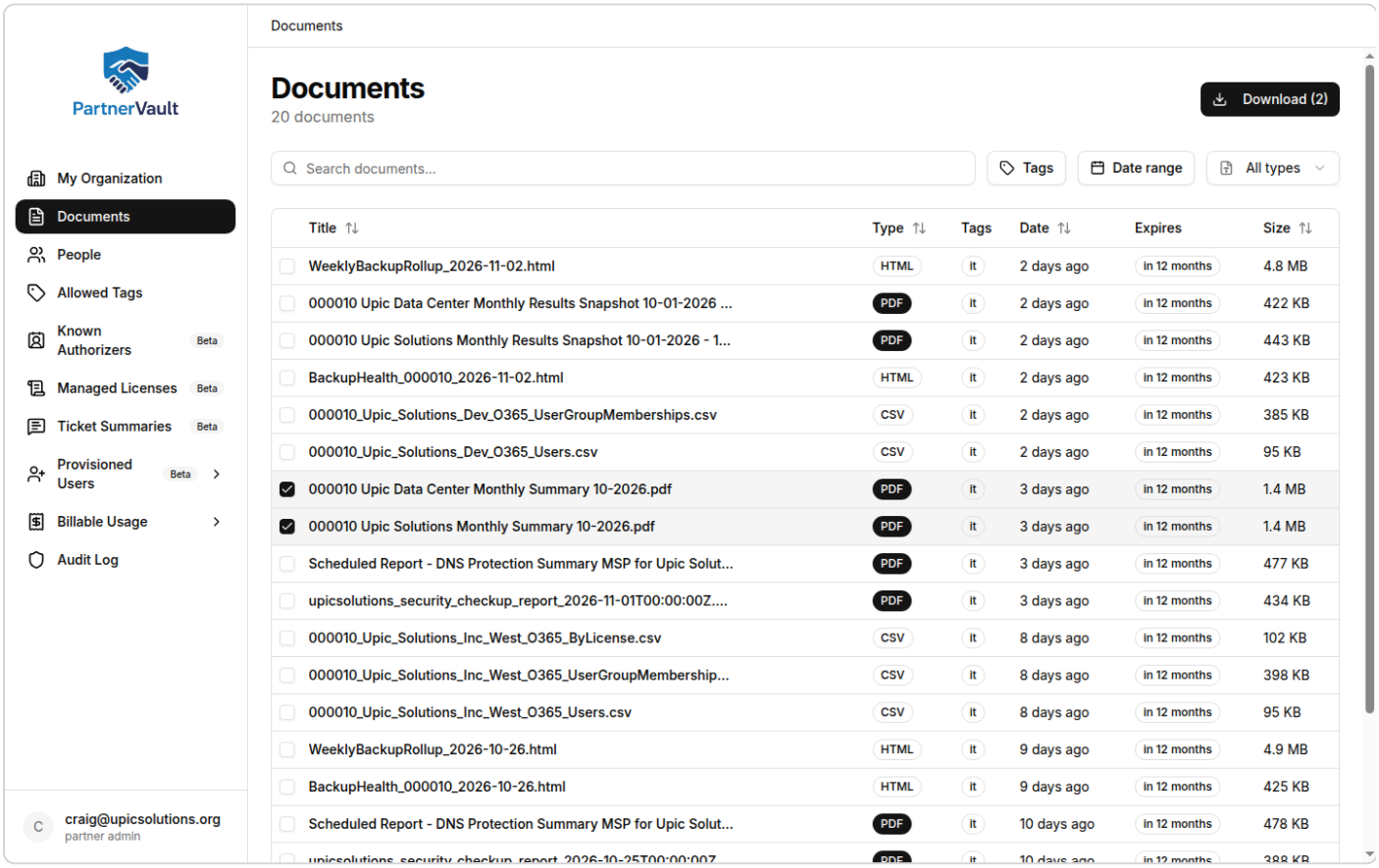
Click **Title**, **Type**, **Date**, or **Size** to sort by that column.

Searching and filtering

- **Search documents**: filter by file name, email subject, or reference number
- **Tags**: show only documents with the tags you choose
- **Date range**: show only documents delivered in a date range
- **All types**: show only one file type

Downloading

- **One document**: open it (see below) and click **Download**.
- **Several documents**: tick the boxes beside them. The **Download** button at the top right shows how many you've picked, for example **Download (2)**. Click it to download them all.



Two documents selected for download

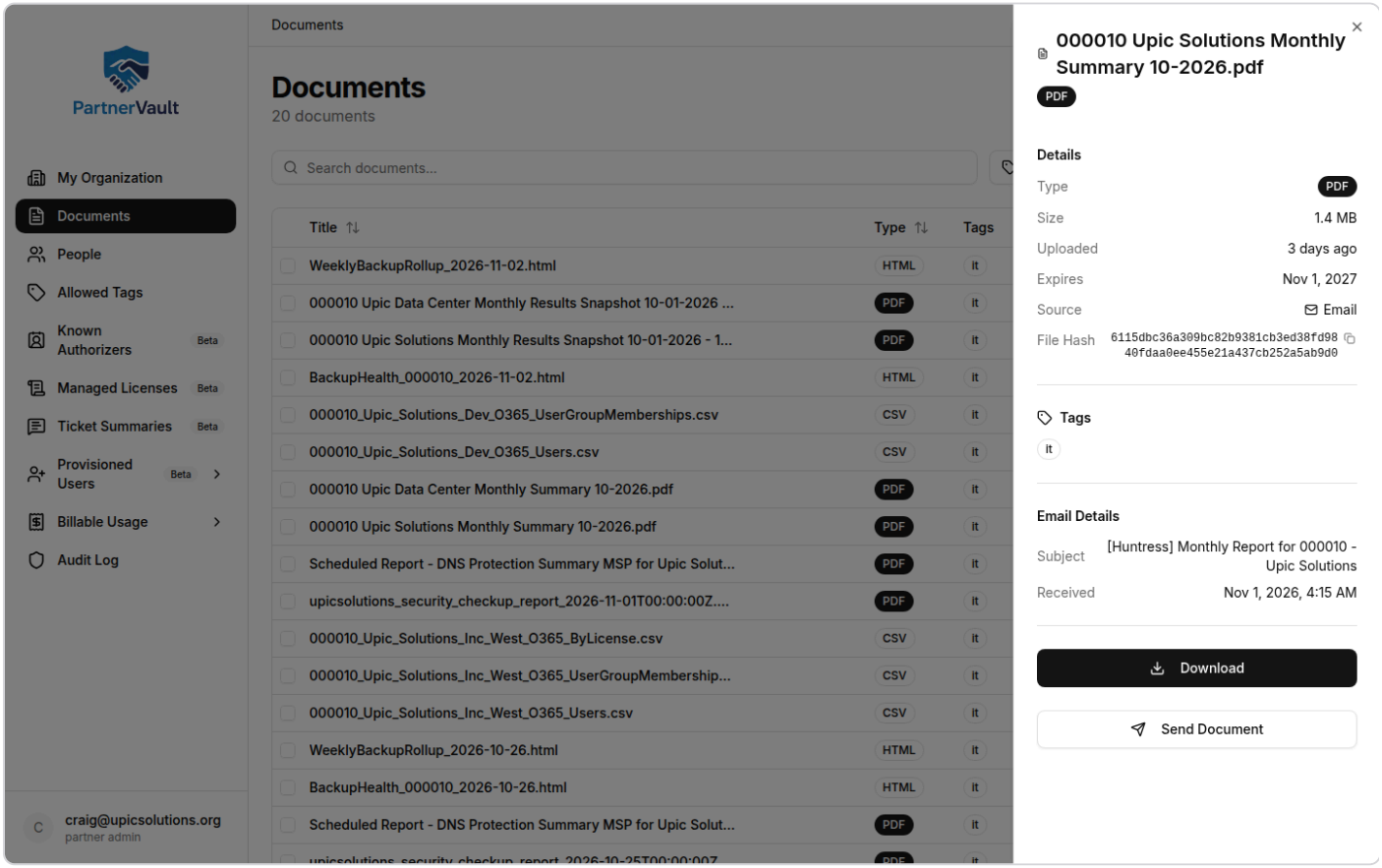
Downloads use secure links that expire after a short time. If a download fails, click **Download** again.

Document details

Click a document's title to open its detail panel on the right. It shows:

- **Details**: type, size, upload date, expiry date, source (for example, Email), and the file hash. The file hash is a fingerprint you can use to check that a file hasn't been altered.

- **Tags**
- **Email Details**: for documents that arrived by email, the original subject line and when it was received
- **Download** and **Send Document** buttons

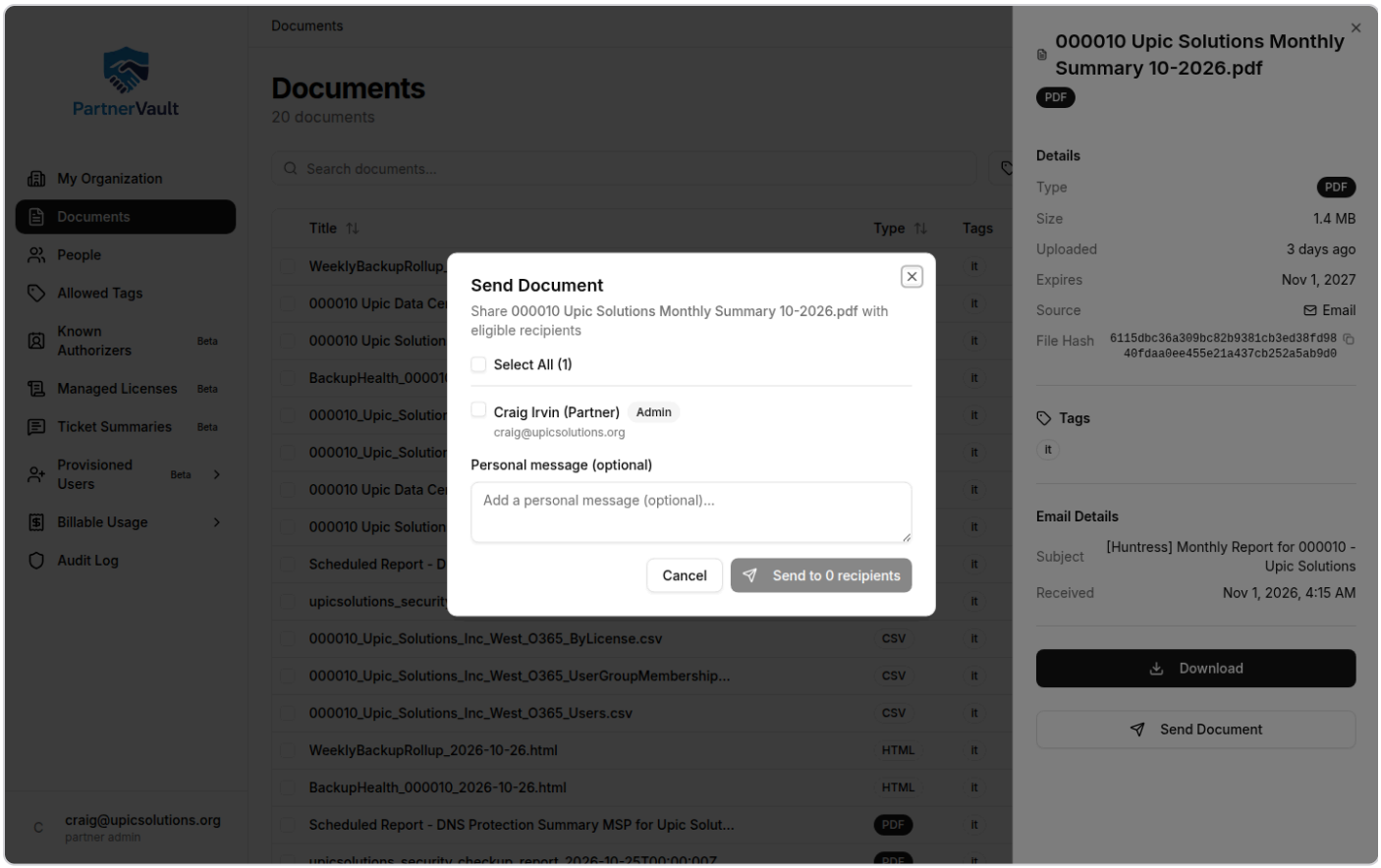


Document detail panel

Sending a document to a colleague

Click **Send Document** in the detail panel to email the document to people in your organization:

1. Tick each person who should receive it, or use **Select All**. Only people allowed to see the document's tags appear in the list.
2. Optionally, add a **Personal message**.
3. Click **Send to *N* recipients**.

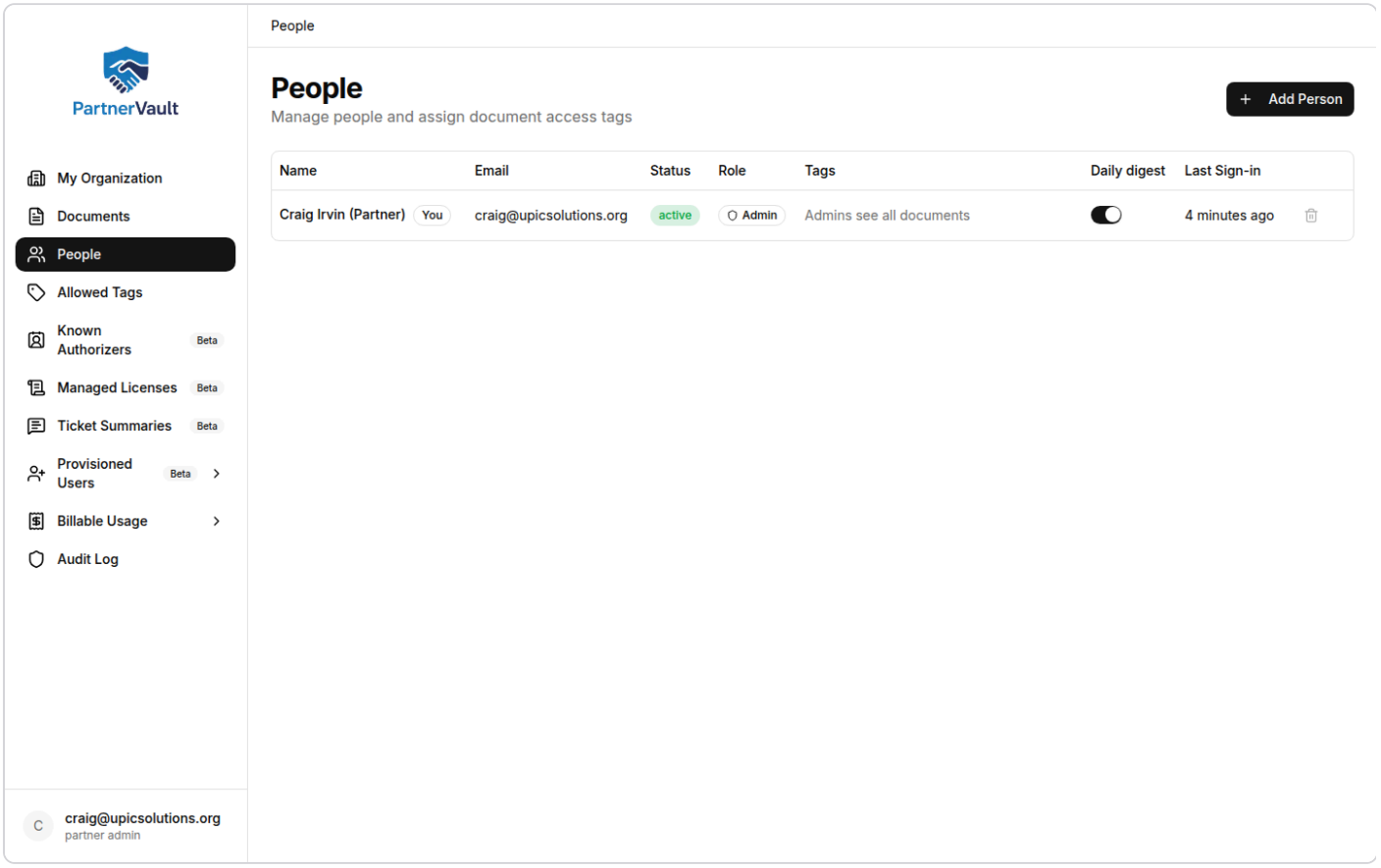


Send Document dialog

> **Note:** People only see documents whose tags have been assigned to them (see People). Partner Admins see every document.

People

People lists everyone in your organization who can sign in to PartnerVault. Here you control which documents each person can see and who gets the daily email.



People page

The people list

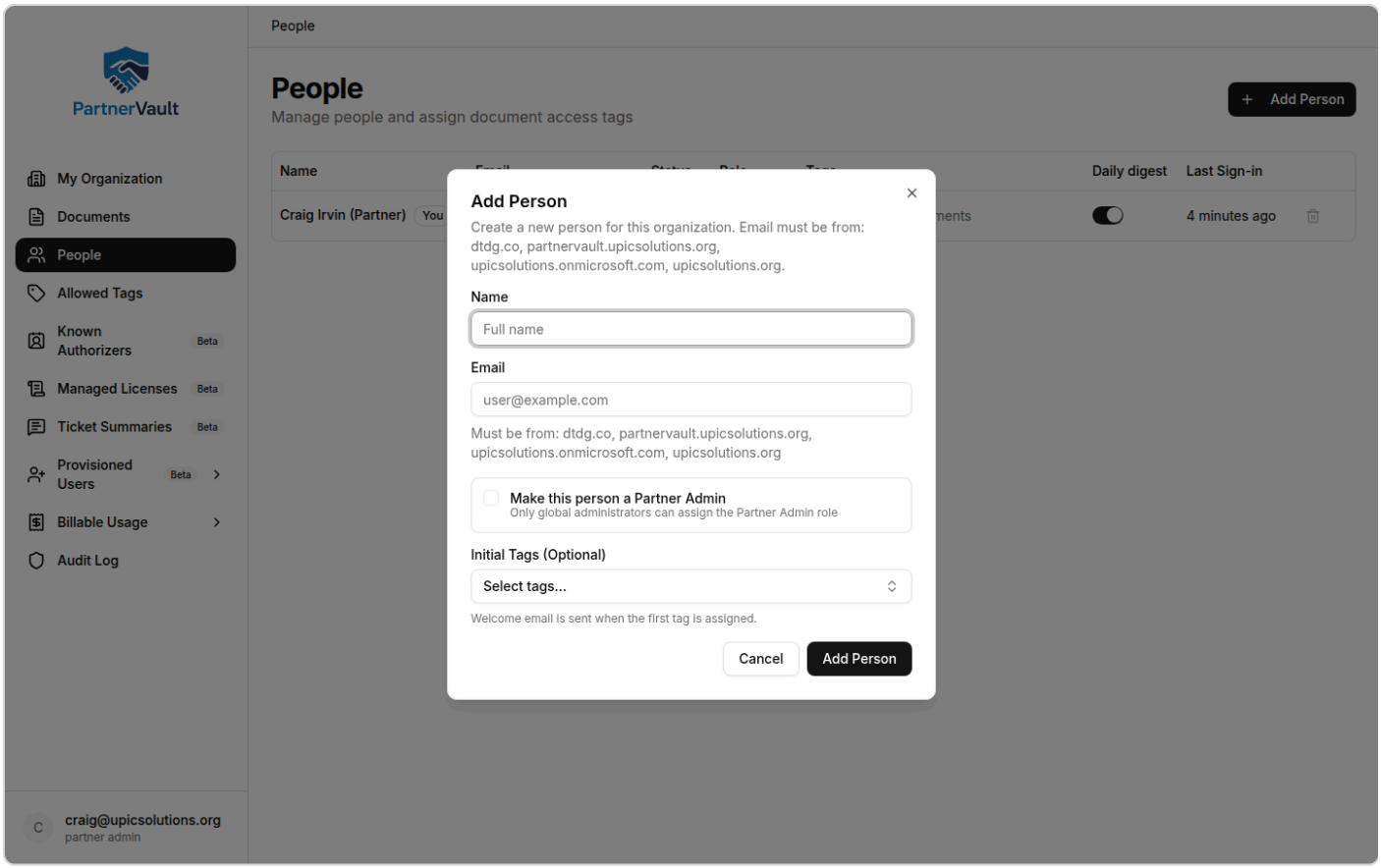
Column	What it shows
Name	The person's name. **You** marks your own account.
Email	The address they sign in with
Status	Whether the account is active
Role	**Admin** marks Partner Admins. Everyone else is a regular person.
Tags	The tags this person can see. Click to add or remove tags. Admins show *Admins see all documents*.
Daily digest	When on, this person gets one email a day listing new documents they can see. Turn it off to stop that email.
Last Sign-in	When they last signed in. Use it to spot accounts nobody uses.

Roles

Role	What they can do
Person	See and download documents with their assigned tags
Partner Admin	See every document, and manage the people in your organization

Adding a person

1. Click **Add Person**.
2. Enter their **Name** and **Email**. The email must use one of your organization's domains, which are listed in the dialog.
3. Optionally, choose **Initial Tags**.
4. Click **Add Person**.



Add Person dialog

The new person gets a welcome email **when their first tag is assigned**. If you add someone without tags, they won't be notified until you give them one. They sign in the same way you do, with an email code.

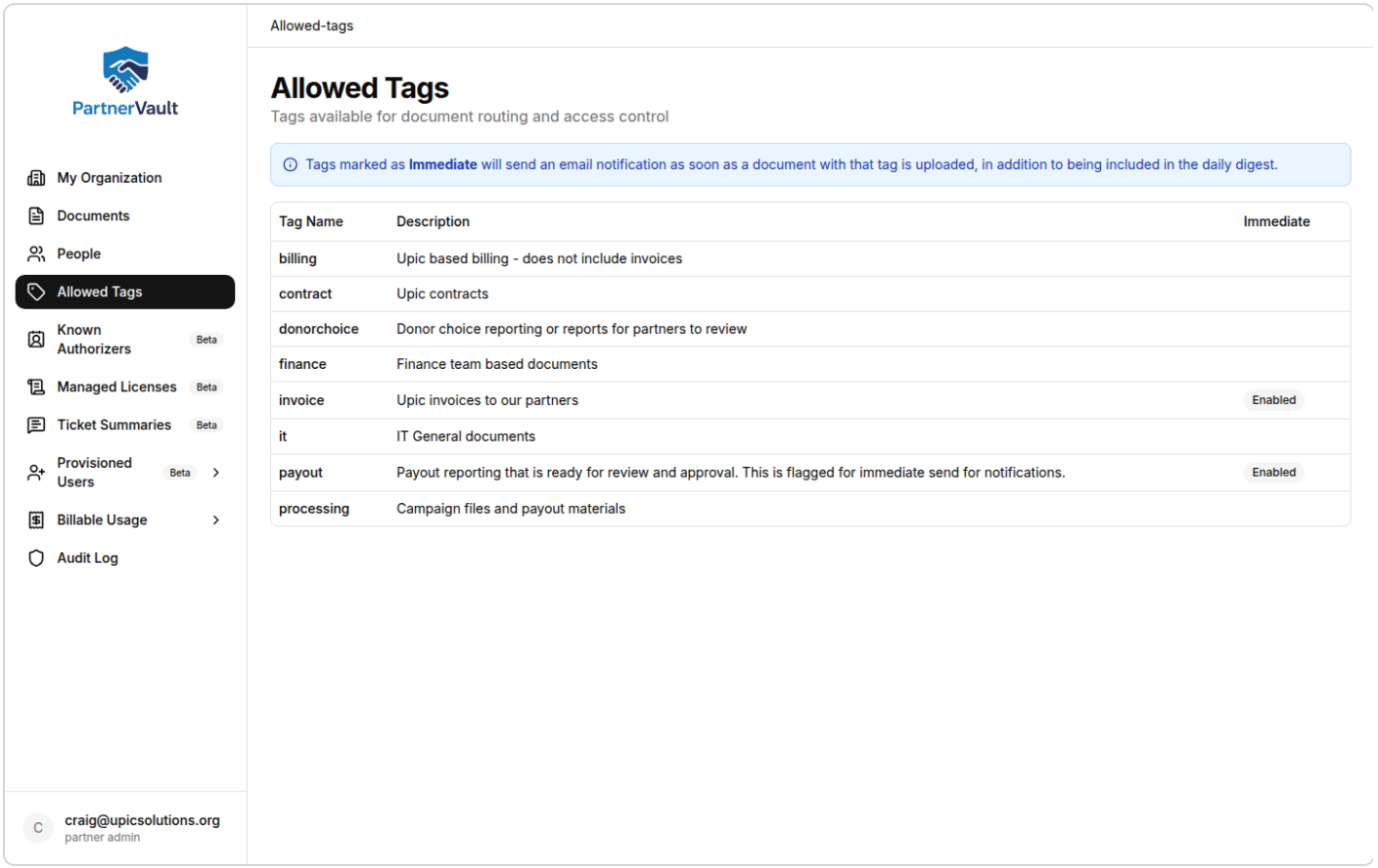
> **Partner Admin role:** Only Upic Solutions can make someone a Partner Admin. If you need another admin, contact your Relationship Manager.

Changing tags or removing someone

- **Change tags**: click the person's **Tags** cell and add or remove tags. The change takes effect straight away.
- **Remove someone**: click the trash-can icon at the end of their row and confirm. You can't delete your own account.

Allowed Tags

Allowed Tags lists the document categories (tags) used in PartnerVault, with a description of each. The list is read-only because Upic Solutions manages the tags.



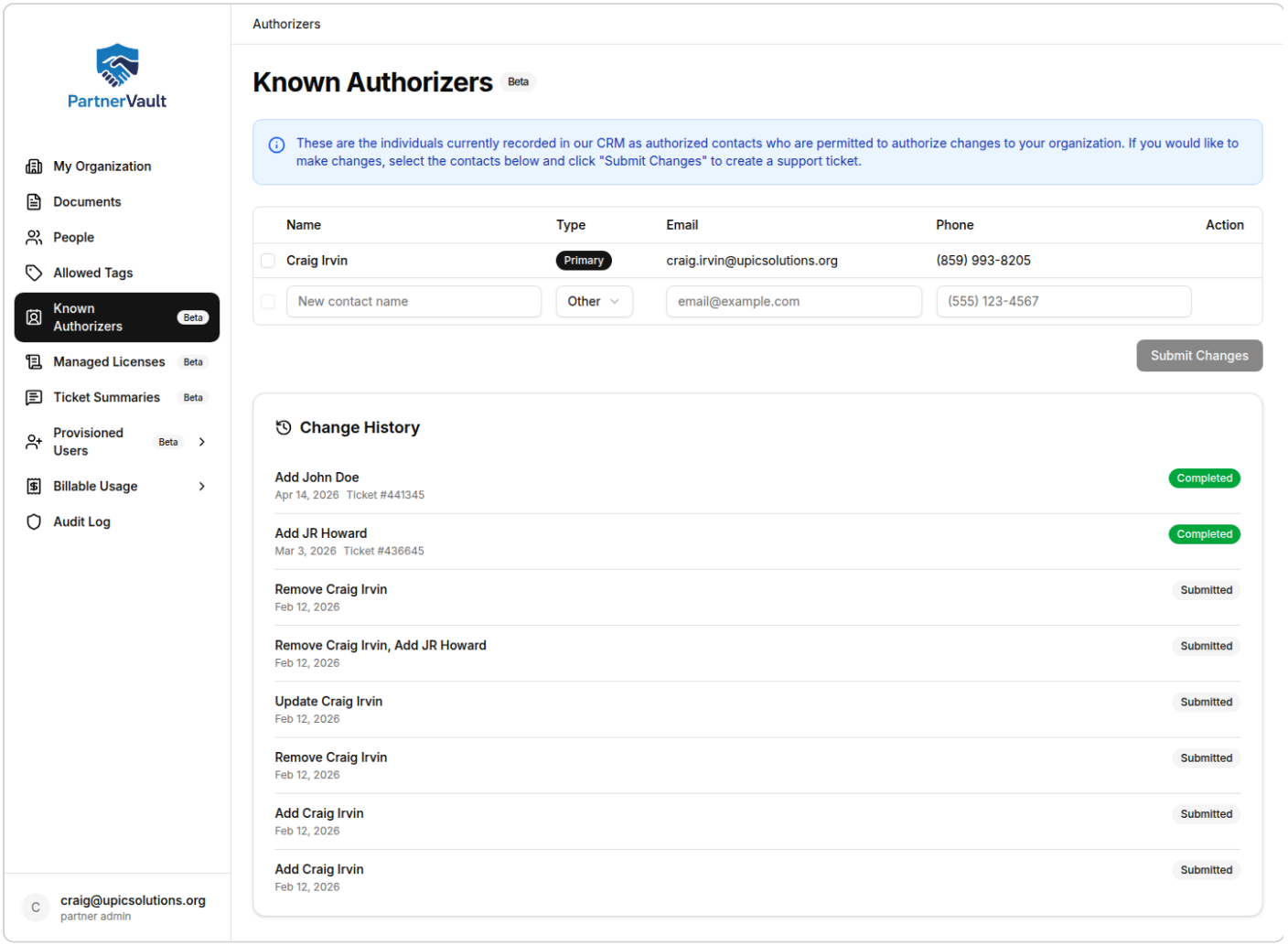
Allowed Tags page

Tags control two things:

- **Who can see a document.** A person sees a document only if they have one of its tags.
- **When people are notified.** Tags marked **Immediate** send an email to everyone who can see the document as soon as it arrives. All tags are also included in the daily digest.

Known Authorizers *(Beta)*

Known Authorizers lists the people at your organization who are recorded in Upic's CRM as authorized to approve changes to your services.



Known Authorizers page

Requesting a change

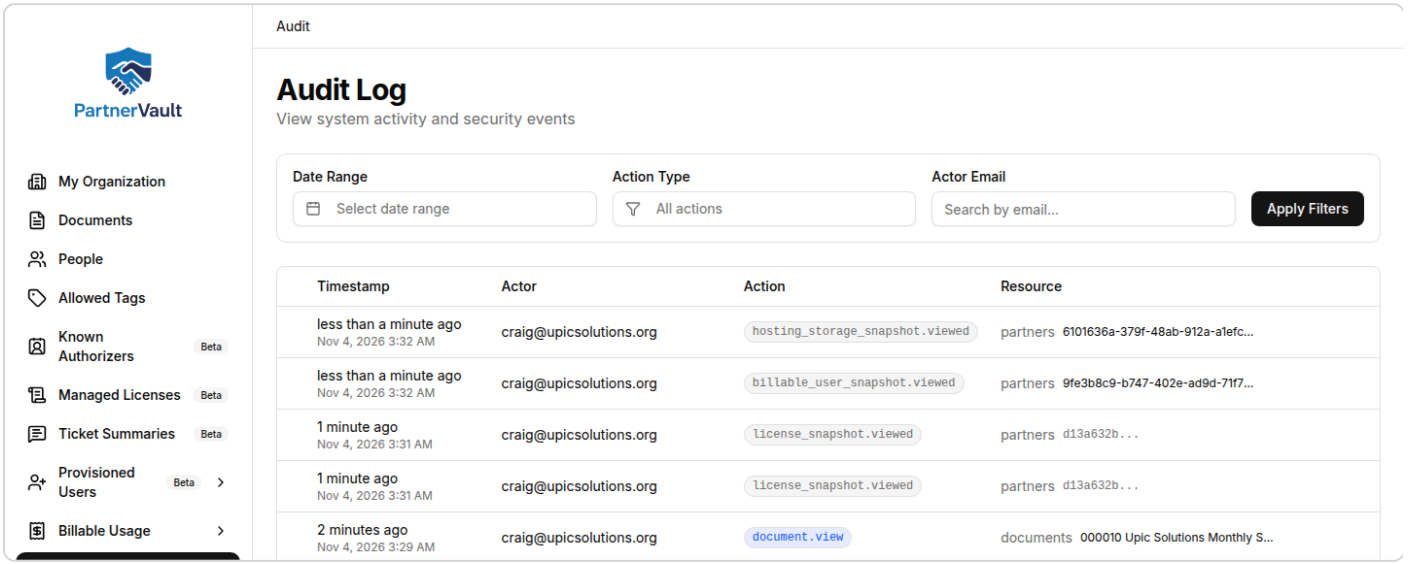
1. Use the **Action** column to mark an existing contact for update or removal. To add someone, fill in the blank row at the bottom of the table: name, type, email, and phone.
2. Click **Submit Changes**. PartnerVault opens a support ticket with Upic Solutions for you.

Change History

Change History lists every change request you've submitted, with its date, ticket number, and status: **Submitted** or **Completed**.

Audit Log

Audit Log records activity in your organization's PartnerVault account: who viewed or downloaded documents, changes to people, report views, and automated system events.



Audit Log page

Each entry shows the **Timestamp**, the **Actor** (the person who did it, or *System* for automated events), the **Action**, and the **Resource** it affected. Click an entry to expand its details.

Filtering

- **Date Range**: limit the log to a period
- **Action Type**: one kind of event, such as `document.download`
- **Actor Email**: one person's activity

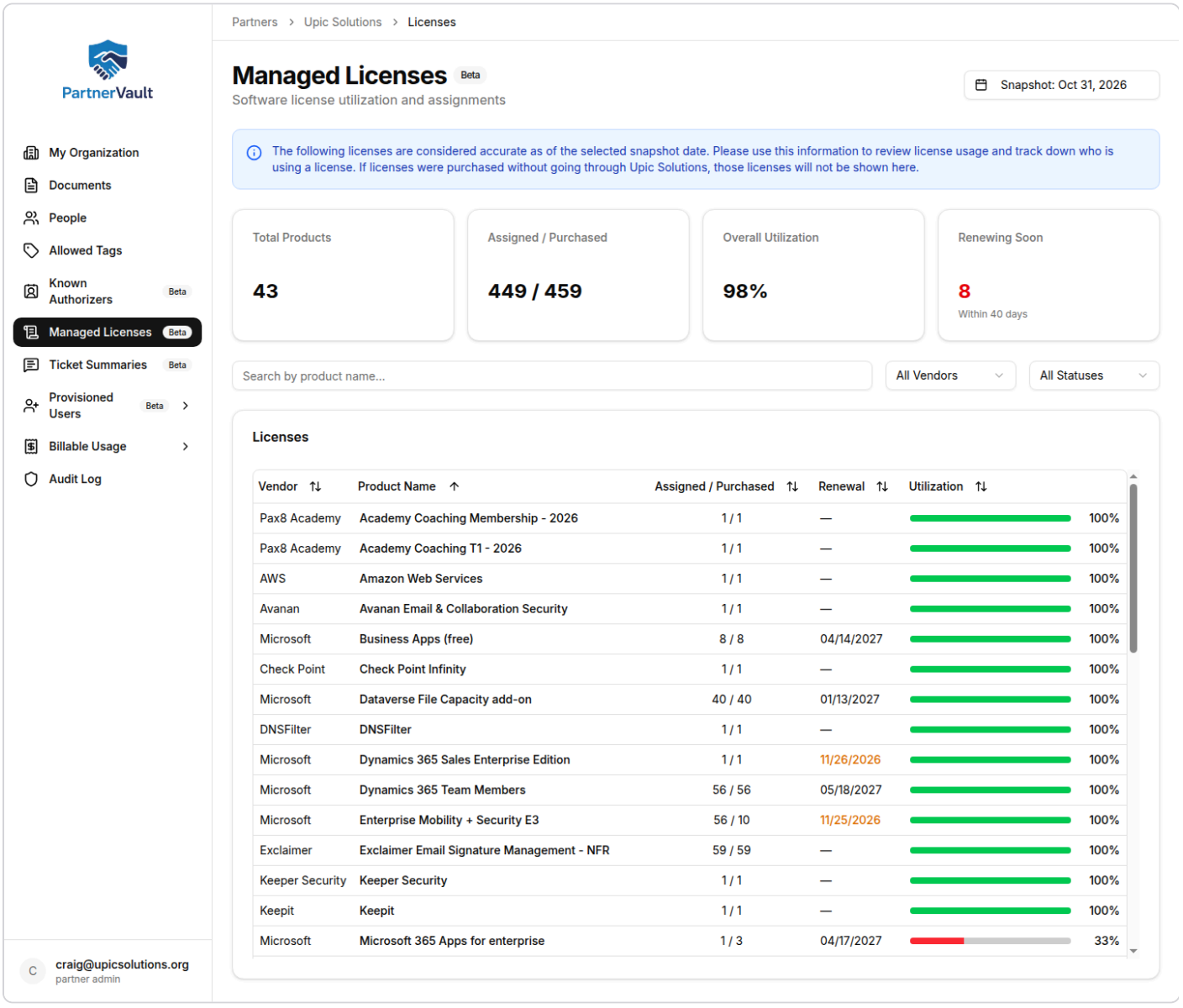
Choose your filters, then click **Apply Filters**. The log is read-only and can't be edited, so you can rely on it for your own compliance and audit records.

Beta Features

Upic Solutions turns these features on for each organization separately. When a feature is on, it appears in your left-hand menu with a **Beta** badge. If you'd like a feature your organization doesn't have yet, contact your Relationship Manager.

Managed Licenses

Managed Licenses shows the software licenses Upic manages for you, such as Microsoft 365, and how many of each are in use.



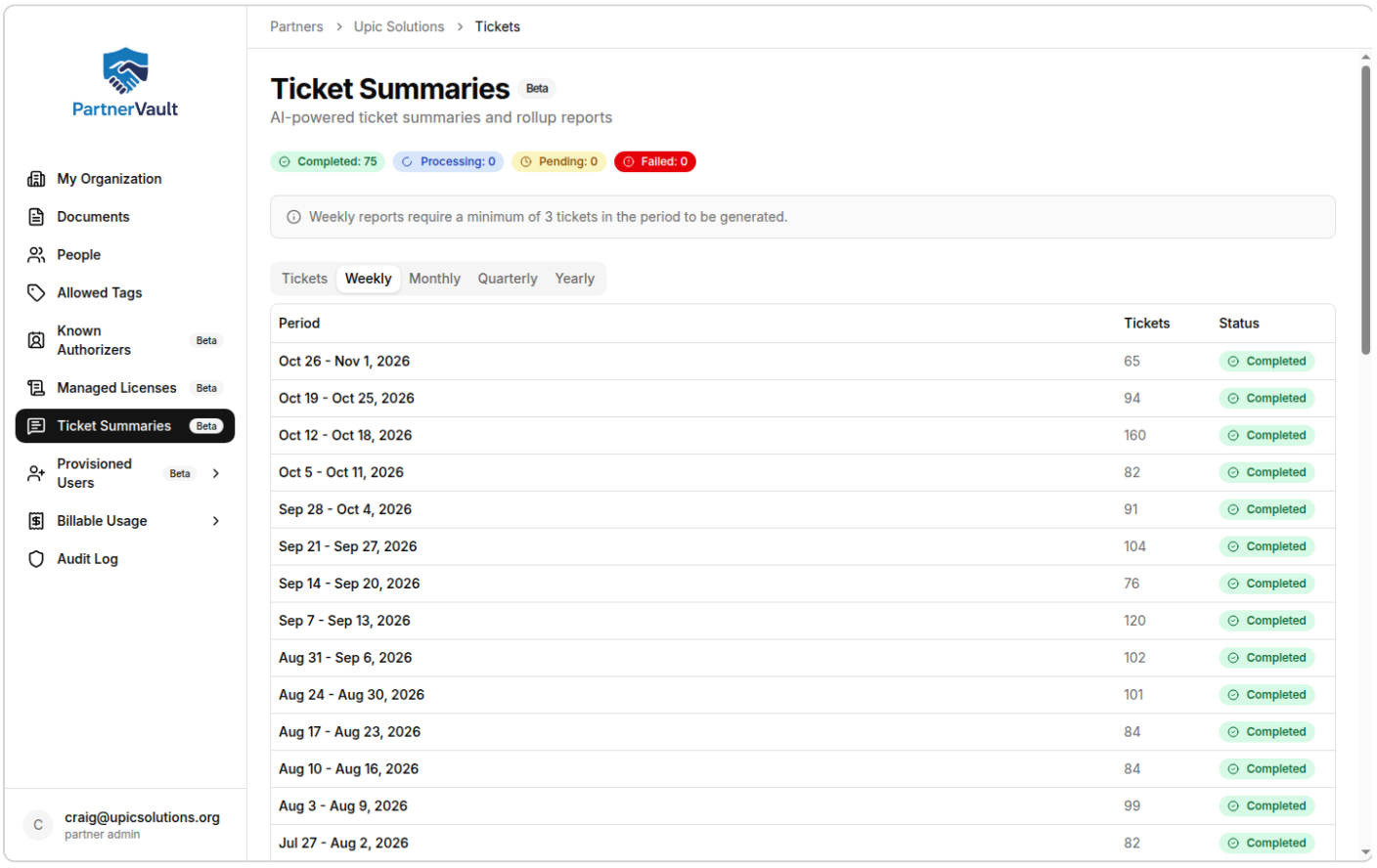
Managed Licenses page

- **Snapshot**: the date the figures are from. Click it to look at an earlier snapshot.
- **Summary cards**: **Total Products**, **Assigned / Purchased** seats, **Overall Utilization**, and **Renewing Soon** (licenses that renew within 40 days)
- **License table**: vendor, product, assigned vs. purchased seats, renewal date, and a utilization bar. Renewal dates coming up soon are highlighted.
- **Filters**: search by product name, or filter by vendor or status

Licenses bought without going through Upic Solutions don't appear here. The page is read-only.

Ticket Summaries

Ticket Summaries gives you AI-written summaries of your support tickets with Upic Solutions, plus weekly, monthly, quarterly, and yearly trend reports.



Ticket Summaries, Weekly tab

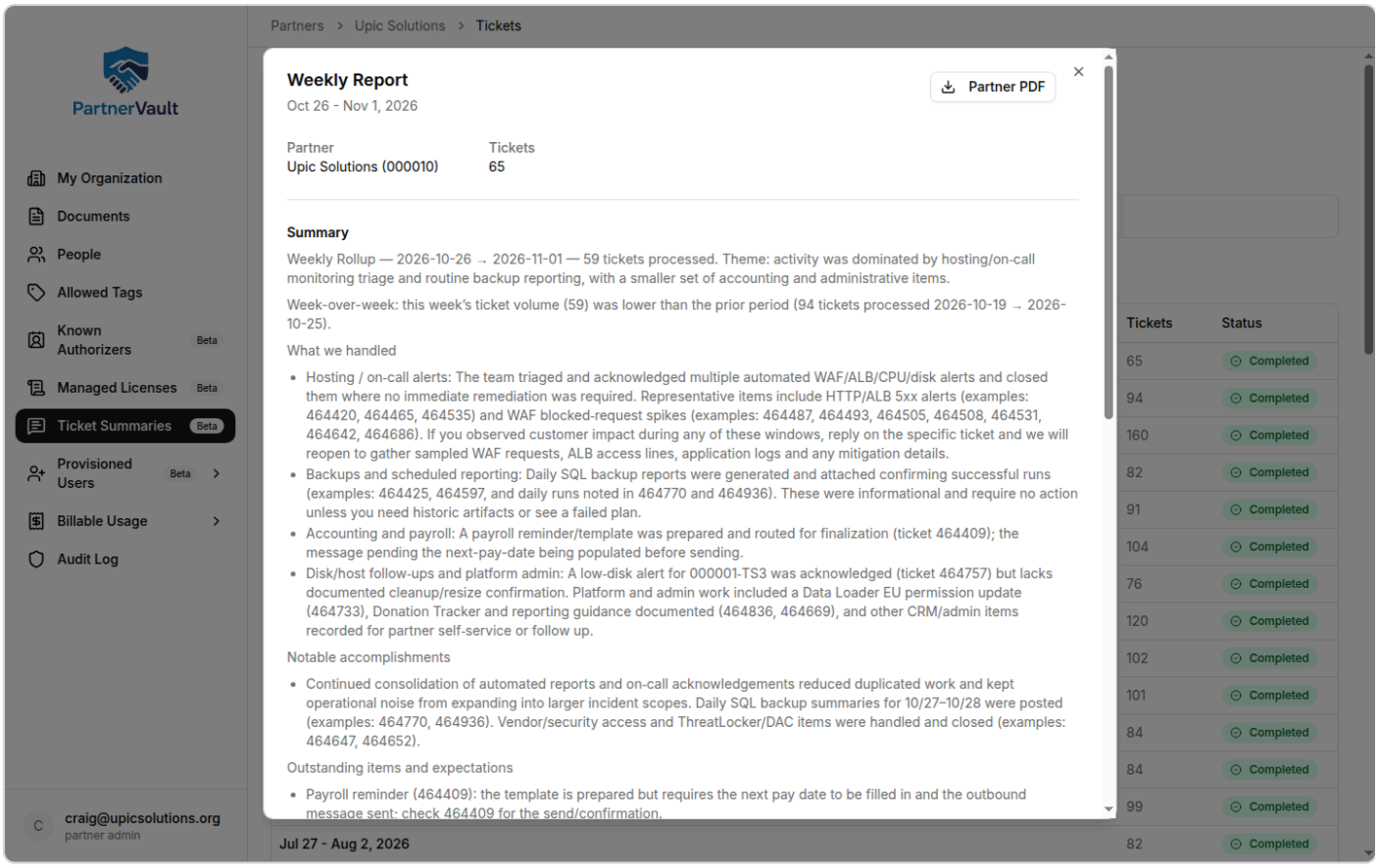
The counts at the top (**Completed**, **Processing**, **Pending**, **Failed**) show where report generation stands.

Tab	What it shows
Tickets	One summary per ticket, with ticket number, subject, service line, category, status, and date solved. Use the search box to find a ticket.
Weekly	Weekly reports (need at least 3 tickets in the week)
Monthly	Monthly reports (at least 5 tickets)
Quarterly	Quarterly reports on Upic's fiscal quarters (at least 10 tickets)
Yearly	Fiscal-year reports (at least 15 tickets)

Periods with too few tickets don't get a report.

Reading a report

Click a row to open the report. A report covers the main themes of the period, what Upic handled, notable accomplishments, and outstanding items. Where it can, it compares the period with the one before. Click **Partner PDF** to save or print a copy.

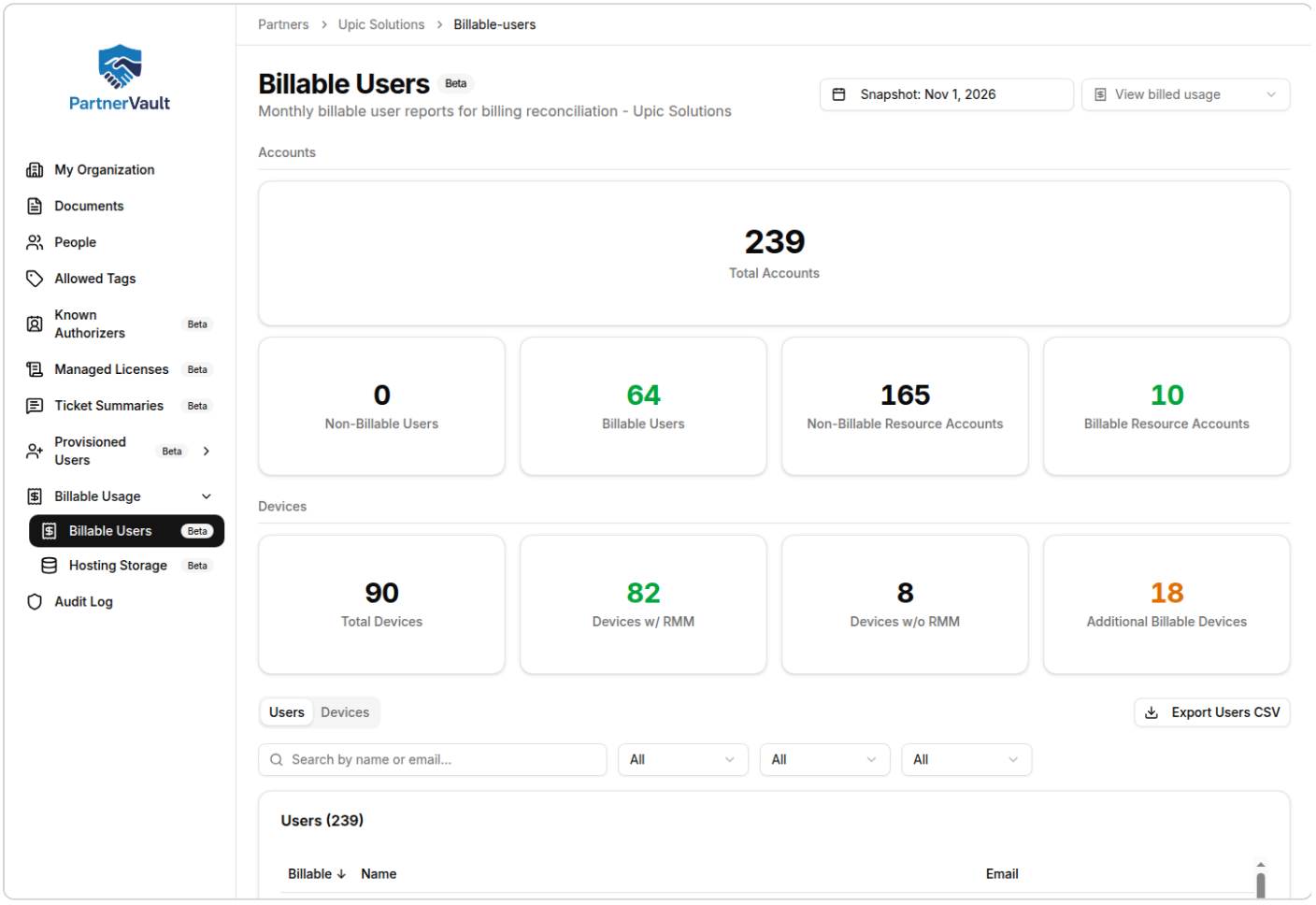


Weekly report detail

Billable Usage

The **Billable Usage** menu has two monthly reports: **Billable Users** and **Hosting Storage**. Each lets you check what Upic bills you for. Both are read-only.

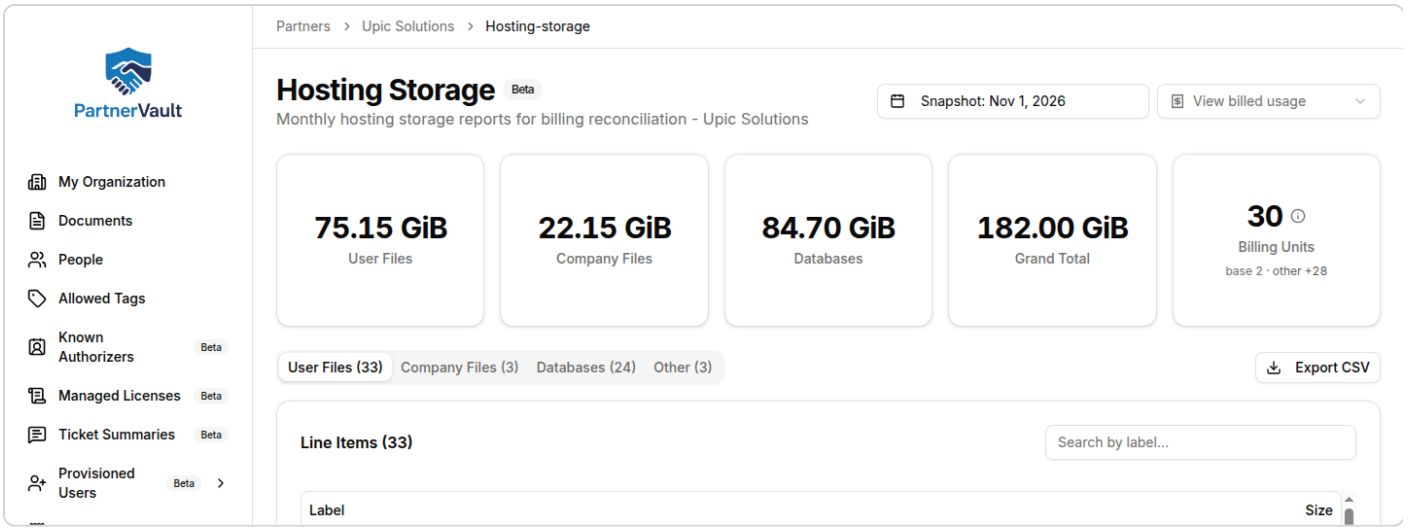
Billable Users



Billable Users page

- **Snapshot**: the month shown. Click it to pick an earlier month.
- **View billed usage**: switch to the figures from the snapshot your invoice was based on
- **Accounts**: **Total Accounts**, plus billable and non-billable users and resource accounts. Resource accounts are shared mailboxes, rooms, and similar non-person accounts.
- **Devices**: **Total Devices**, devices with and without Upic's monitoring agent (**RMM**), and **Additional Billable Devices**
- **Users / Devices tabs**: the full list behind the numbers. Search by name or email, and filter by billable, enabled, or resource status.
- **Export Users CSV**: download the list for your own records

Hosting Storage



Hosting Storage page

- **Snapshot** and **View billed usage** work the same way as on Billable Users.
- **Summary cards**: storage used by **User Files**, **Company Files**, and **Databases**, the **Grand Total**, and your **Billing Units**. Billing units are one unit per 100 GiB of storage, rounded up, plus any extra hosted items. The ⓘ icon shows the breakdown.
- **Tabs**: line items for **User Files**, **Company Files**, **Databases**, and **Other**, with the size of each
- **Export CSV**: download the line items

Upic bills storage on your **highest usage in the month**, so a short-lived spike counts toward that month's units.

Getting Help

If you have questions or need assistance:

- **Document access issues:** contact your Relationship Manager.
- **Adding or removing authorized contacts:** use Known Authorizers.
- **Sign-in or account problems:** contact the Upic Answer Center at 877-459-5489 or answercenter@upicsolutions.org.
- **Feature requests or feedback:** contact your Relationship Manager.

PartnerVault is operated by Upic Solutions. All data is encrypted at rest and in transit.