SEAGATE

Lyve Management Portal User Manual

LYVE™

Contents

Lyve Virtual Assistant

If you need to contact support, click on the Lyve Virtual Assistant icon to start a support session. Lyve Virtual Assistant is available throughout the Lyve Management Portal.

> ✏️ Seagate Virtual Assistant is only available during region's business hours of 8:00 AM-5:00 PM US Central Time and 8:00 AM-5:00 PM Central European Time.

Support

Quick Links
- Data Transfer as a Service FAQ
- How to Manage Lyve Users
- How to Create a Lyve Project as a Solution Provider/MSP*
- Return/ Cancel Shipping Instructions

User Manuals
- Lyve Mobile Array
- Lyve Client Software
- Lyve Mobile Rackmount Receiver
- Lyve Drive Shuttle

Contact Support

Account Management

Why do I need an account?

A Lyve Management Portal account lets you manage your projects, users, and billing in one central location. In addition, an account username and password are required to authorize computers to unlock and access Lyve Mobile Array and compatible devices.

Billing

Bills   Payments

Outstanding Payment Due:

Statement Description	Projects Included	Invoice Number	Due Date ↓	Amount	Actions
11-Feb-2023 Statement	1/11 UAT	LV00005557	03-13-2023		⊕ ⤓
12-Jan-2023 Statement	1/11 UAT	LV00004768	02-11-2023		⊕ ⤓

2 record(s)

Payment Methods

Payment Terms	Payment Method	Credit Application Status	Billing Address
Net 30	Wire Transfer	Complete	

To make updates or changes to your payment method, please contact our Lyve Virtual Assistant during regular business hours.

What is the difference between a Business account and a Solution Provider account?

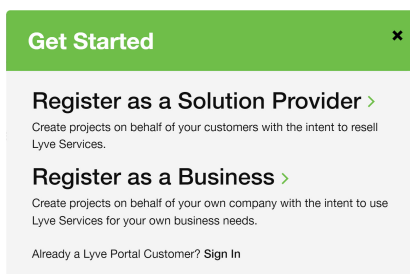There are two types of Lyve accounts:

- **Business**—Lets you create projects on behalf of your business.
- **Solution Provider**—Lets you create projects on behalf of your customers and register deals with Seagate.

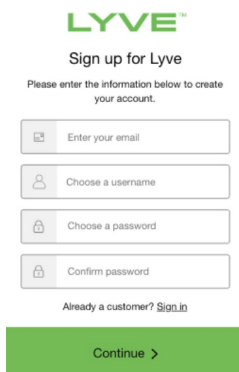# How do I register a new billing account?

1. Go to lyve.seagate.com.
2. Click **Get started**.
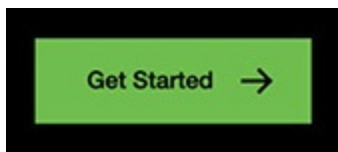
3. Click **Register as a Solution Provider** or **Register as a Business**.

4. Enter an email address and username, and then create and confirm a new password.

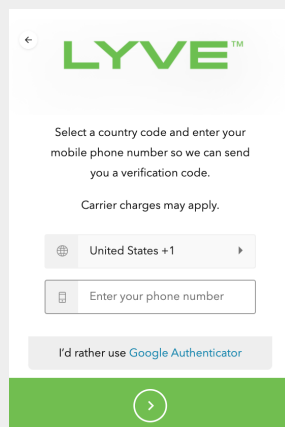5. Use an authenticator app such as Google Authenticator or Microsoft Authenticator to scan the QR code and receive a passcode. Enter your passcode and click **Continue**.

> ✏️ Alternatively, you can receive a passcode via SMS. Click the **SMS** option and enter your phone number to receive the 6-digit verification code. Note that carrier charges may apply.
>
>
>
> Enter the verification code sent to your phone and click **Continue**.

6. You're asked to record a recovery code. A recovery code lets you log in to Lyve Management Portal from other devices. Record the recovery code and keep it in a safe place. Once it's recorded, check the confirmation box and click **Continue**.

To login to Lyve on a different device, you'll need to enter a recovery code. Please record the code below and keep it somewhere safe.

M16Z - 9G3W - 8DPC - VXRC - PQRH - BNAX

☑ I have recorded and stored the above code

7. Follow the onscreen instructions to set up your account. Read the terms and conditions on the Account Information screen and check the boxes confirming your agreement.

European customers

You must submit a VAT ID to create your account. Enter your VAT ID and click **Submit** to validate it with the VIES (EU) or HMRC (UK) database.

Companies registered in Germany/Spain —After submitting your VAT ID, enter the legal company name.

VAT ID

Submit your VAT ID below. The VAT ID that you input will be compared to the official VIES (Europe) database or HMRC (UK) database to be validated.

| VAT ID | Submit |

✓ VAT ID validated successfully   ✕

| Legal Company Name |

Companies registered in other European countries —If you don't recognize the legal company name, make sure you entered the correct VAT ID. If you believe the resulting legal company name does not match your VAT ID, click on the VIES or HMRC database links or contact your finance team.

VAT ID

Submit your VAT ID below. The VAT ID that you input will be compared to the official VIES (Europe) database or HMRC (UK) database to be validated and determine your legal company name.

| VAT ID | Submit |

✓ VAT ID validated successfully   ✕

| Legal Company Name | *If you do not recognize the legal comapny name, please check to make sure that the VAT ID you entered is correct or reach out to your Finance Team.*

Click **Continue**.

8. Select a payment method: **Credit Card** or **Pay by Invoice.**

- **Credit Card:** Enter your payment information and click **Submit**.
- **Pay by Invoice:** You will need to complete a credit application form after creating your account. Select **Pay by Invoice** and click **Continue**. For more details, see How do I pay by invoice?

9. Review your account info and click **Confirm**.

10. You will be notified to add an end user after your account is created. The end user will receive an email with a link that lets them register for Lyve Management Portal.
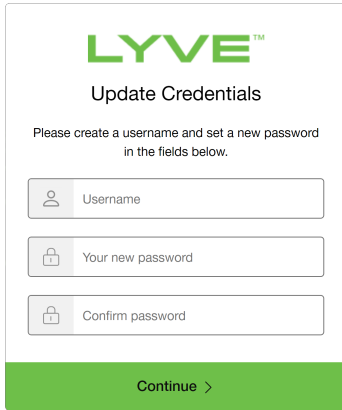
Depending on your business processes, you may have a need for multiple billing accounts. You can create additional billing accounts when signing in by clicking the **Create New Billing Account** button:
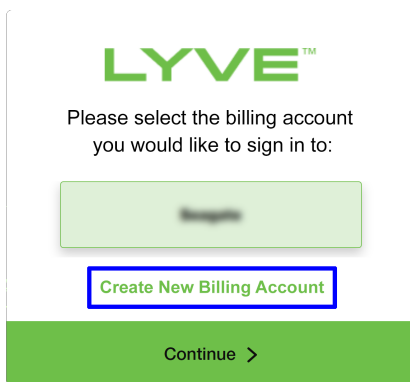
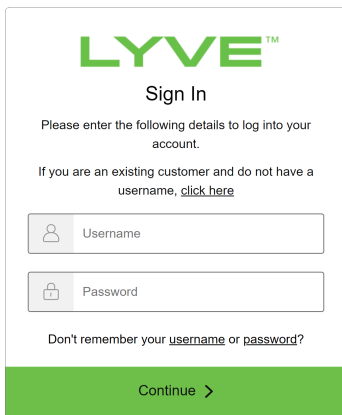# How do I register a new billing account through assisted sales?

If sales is assisting you with registering your account, proceed through the following steps:

1. Your sales representative will send you an email inviting you to Lyve Management Portal. If you can't find the email in your inbox, be sure to check your spam/junk mail folder.
2. Click on the link in the email to complete the registration process and create your account.
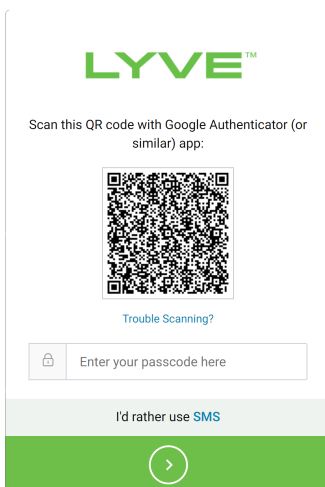3. At the prompt, create a username and password for the account.

4. Enter your username and password. Click **Continue**.

5. Use an authenticator app such as Google Authenticator or Microsoft Authenticator to scan the QR code and receive a passcode. Enter your passcode and click the Continue icon.

> 🖋 Alternatively, you can receive a passcode via SMS. Click the **SMS** option and enter your phone number to receive the 6-digit verification code. Note that carrier charges may apply.
>
>
>
> Enter the verification code sent to your phone and click the Continue icon.

6. Review your account information and update as needed.

Review and acknowledge the agreement and privacy statement, and then click **Continue**.

7. Review the payment type selected and update if needed.

> 📝 After selecting a payment type and continuing to the next step, you won't be able to change your payment type selection without assistance from a Lyve sales representative.

- **Credit Card:** Enter your credit card details and click **Submit**. Note that you can add additional credit cards after the account is created. For more details, see How do I add a payment method?
- **Pay by Invoice:** Click **Continue**. If you're switching from **Credit Card** to **Pay by Invoice**, contact your Lyve sales representative after the account is created.

8. Review your account details and update as needed. Click **Confirm**.

How do I sign in?
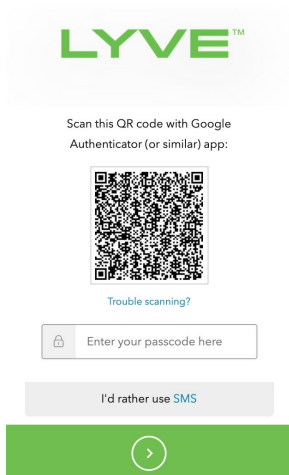
1. Go to lyve.seagate.com.
2. Click **Sign In** in the navigation bar.

3. Enter your username and password. Click Continue.

5. Use an authenticator app such as Google Authenticator or Microsoft Authenticator to scan the QR code and receive a passcode. Enter your passcode and click the Continue icon.
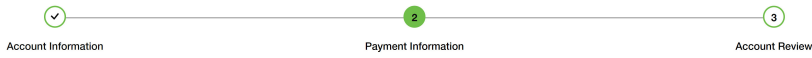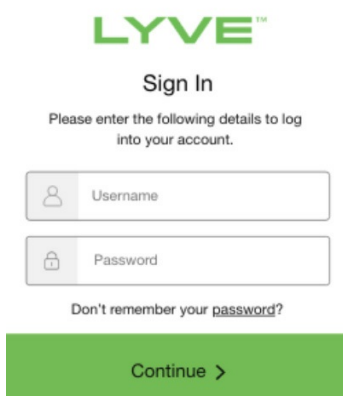
Alternatively, you can receive a passcode via SMS. Click the **SMS** option and enter your phone number to receive the 6-digit verification code. Note that carrier charges may apply.

Enter the verification code sent to your phone and click the Continue icon.

6. Select the billing account you would like to sign in to and click **Continue:**

Multi-Account Management

What is the purpose of multiple billing accounts?

Depending on your business processes, you may need multiple billing accounts. For example, your company may have a U.S. billing address as well as an E.U. billing address. In Lyve Management Portal, users can access multiple billing accounts using their same username/password credentials.

How do I create an additional billing account

1. Go to lyve.seagate.com and sign in. Enter a verification code to continue to Lyve Management Portal.
2. In the Select Account dialog, click **Create New Billing Account**.
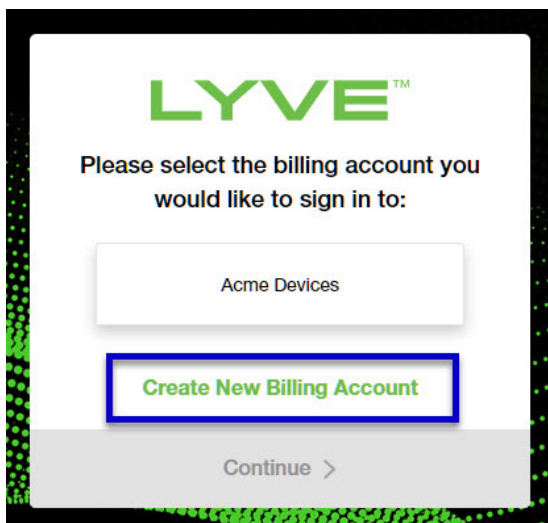
> **i** If you're already signed in to lyve.seagate.com, click on the Account icon in the navigation bar and select **Account**.
>
>
>
> Click the **Switch Account** button.
>
>

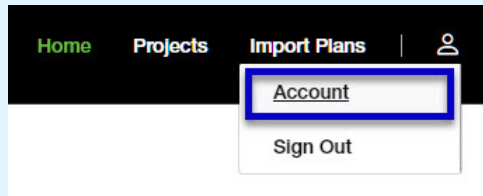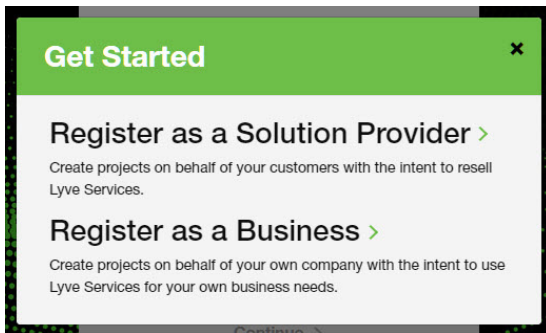3. Click **Register as a Solution Provider** or **Register as a Business**.

1. Enter account information. Click the links to read the terms and conditions and privacy information. Check the boxes confirming your agreement and click **Continue**.
2. Choose a payment method:
   - **Credit Card** —Enter your credit card details and click **Submit**. Note that you can add additional credit cards after the account is created. For more details, see How do I add a payment method?
   - **Pay by Invoice**— You will need to complete a credit application form after creating your account. For more details, see How do I pay by invoice? Select **Pay by Invoice** and click **Continue**.
3. Review your account details and update as needed. Click **Confirm**.

How do I switch between accounts?

If you're already signed in to lyve.seagate.com, you can switch between multiple accounts that have been created.

1. Click on the Account icon in the navigation bar and select **Account**.
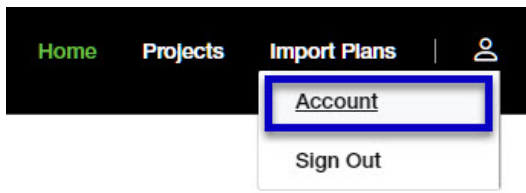
2. Click on the **Switch Account** button.

3. Select another account.

How do I invite an existing user to a new account?

1. Go to lyve.seagate.com and sign in to the account you would like to add the user to. Enter a verification code to continue to Lyve Management Portal.
2. Follow the instructions for adding a new account user.

If the user is already registered with another Lyve Management Portal account, they will receive an email inviting them to the added account. The user should:

1. Click on the link in the email.
2. Sign in to Lyve Management Portal using their existing username and password.
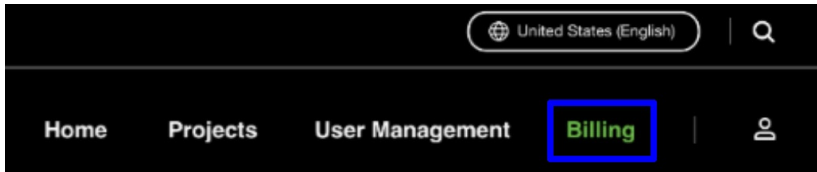3. Select the new account on sign in.

> **i**   **Note**—The same user can have different roles in different accounts.

> **!**   You will receive an error when trying to invite a user who had previously been invited to another account but did not complete the registration process. The user must complete the original registration process in order to receive invites to other accounts.

Billing Management

How do I view bills and payments?

1. Go to lyve.seagate.com and sign in.
2. Click on **Billing** in the navigation bar.

View bills

1. Click on the **Bills** tab.

2. Click on a statement link to view a statement.

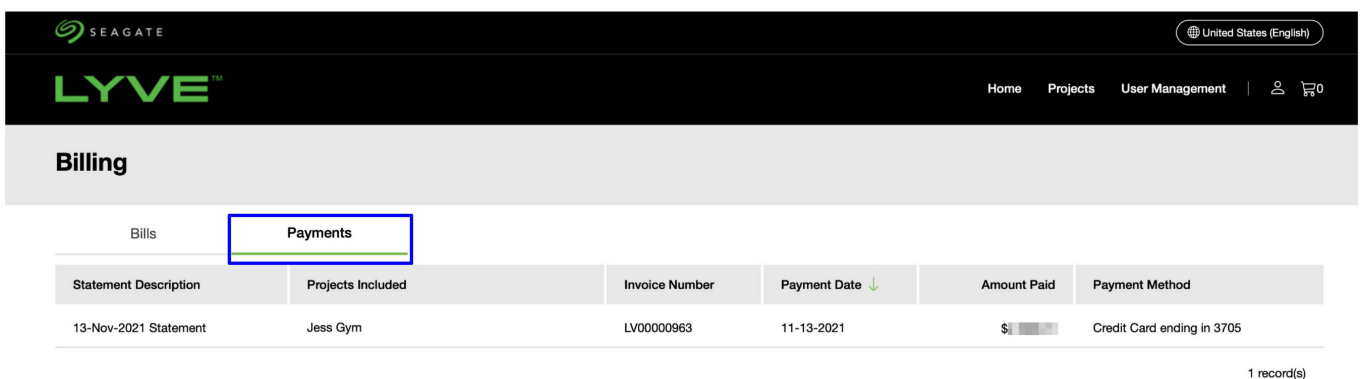3. To preview a PDF version of the statement, click on the Preview icon.

4. To download a PDF version of the statement, click on the Download icon.

View payments

1. Click on the **Payments** tab.

2. Review payment details in the list.

How do I add a payment method?

Payment methods can only be added or edited when paying by credit card.

> ✏️ To make updates to payments by invoice, click on the Lyve Virtual Assistant icon on the right side of the screen. Make the following menu selections to be connected to a support agent: **Menu** | **Manage account** | **Billing**.

To add a new credit card:

1. Go to lyve.seagate.com and sign in.
2. Click on **Billing** in the navigation bar.
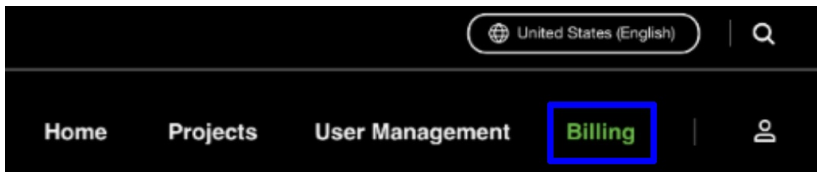
3. Click **Add Credit Card**.
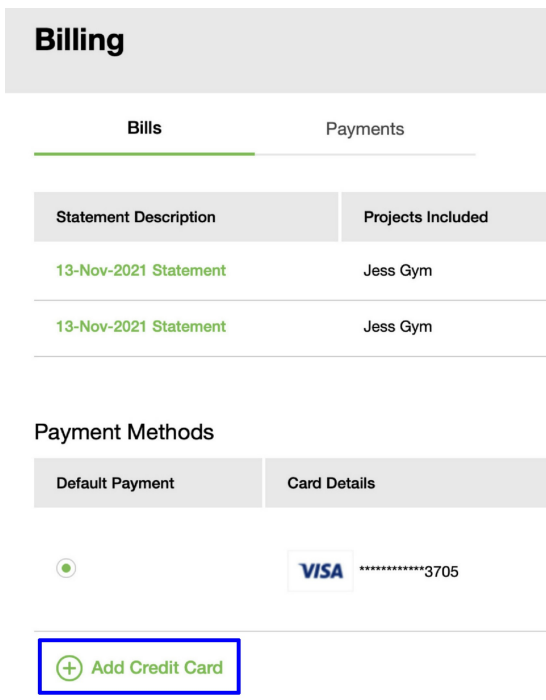
> ✏️ **US customers:** American Express®, Discover®, Mastercard®, and Visa® are accepted.
> **European customers:** Mastercard® and Visa® are accepted.

4. Enter credit card details.
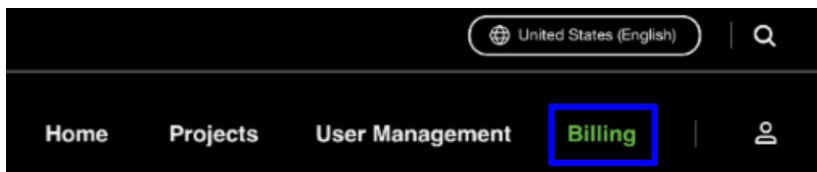
Click **Submit**.

> ✎ The most recently added card is automatically set as the default payment method unless you select a different card as the default.

How do I remove a payment method?

> ✎ The default payment method can be updated but cannot be removed.

1. Go to lyve.seagate.com and sign in.
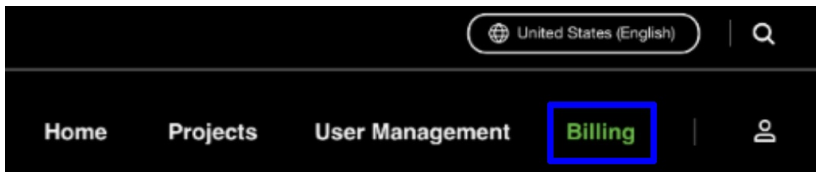2. Click on **Billing** in the navigation bar.

3. Click on the Remove icon.

4. Confirm that you want to remove the payment method.

How do I edit a payment method?

1. Go to lyve.seagate.com and sign in.
2. Click on **Billing** in the navigation bar.

3. Click on the Edit icon.

4. Update your billing info and click **Continue**.


How do I pay by invoice?

To pay for services by invoice, you'll need to complete a credit application and be approved by Seagate

prior to receiving product shipments. You can start the application process when registering your account or by going to the Billing page.

Starting the application process

During account registration (new account)

1. On the payment information page, select **Pay by Invoice** as your payment method and click **Continue**.
2. Once the account has been created, click on the **Complete Credit Application** button.
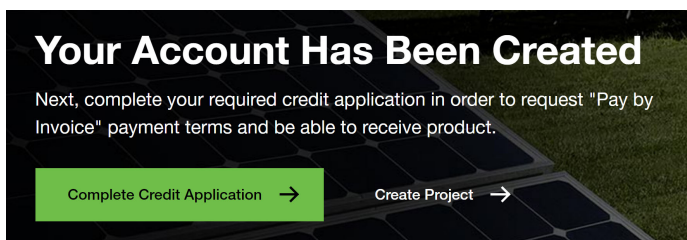
On the billing page (existing account)

1. Go to lyve.seagate.com and sign in.
2. Click on **Billing** in the navigation bar.
3. In the Payment Methods section, click on the **Complete Application** button.

> If you are reselling Seagate services, you will be required to upload the applicable tax documentation.

Inviting a user to complete the application

You can invite another user to complete the credit application. This may be useful if you typically rely on another member of your organization for finance and tax details, bank and trade references, legal and financial contacts, and so on.

To invite another user:

1. Start the application.
2. On the right-hand side of any page in the form, click the **Invite User** button.

Invite a User to Fill Out Credit Application

If a different member of your organization needs to fill out the credit application, you can invite them to do so in Lyve Management Portal.

Invite User

3. Fill in the required information.

The invited user will receive an email that provides a link to register their account. After they've registered, the user will have access to the credit application, however, they won't be able to view projects unless given permission by an account adminstrator.

As a Solution Provider, can my customers see my billing and transactions?

No, customers cannot see your billing and transactions. They are able to download the Lyve Client software to manage their devices. Customers are also able to add other product end users in the Lyve Management Portal. They are only permitted to add users at or below their level, not above.

Project Management

How do I create a project?

Projects can be created by users controlling the master account as well as sub users.

1. Go to lyve.seagate.com and sign in. Enter a verification code to continue to Lyve Management Portal.
2. Click **Projects** in the navigation bar.
3. Click **Add Project**.
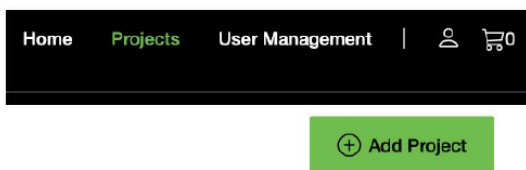
Two types of service plans are available:

- **Lyve Mobile Data Transfer as a Service**—Provides effortless data movement and flexibility. See Creating a Lyve Mobile Data Transfer as a Service project
- **Seagate Systems Leasing**—Provides reliable storage nodes on a leasing basis. See Creating a Seagate Systems Leasing project.

> ✏️ Data Transfer as a Service projects require a 10-day minimum term. Systems Leasing projects require a minimum 3 year commitment and do not offer rate plans.

Creating a Lyve Mobile Data Transfer as a Service project

1. On the Service Plan page, click **Lyve Mobile Data Transfer as a Service**.
2. **Choose Storage Service Only** or **Storage Service with Cloud Import.** For additional instructions related to our cloud import service, see Cloud Import Service User Manual & Reference Guide
3. Select a rate plan and click **Continue**

Service Plan

◉ **Lyve Mobile Data Transfer as a Service** Efficient and secure data logistics from endpoint to edge to core for mass capacity data sets.

○ **Storage Service Only**

Making data movement easy, secure and reliable, select the storage and accessories you need for your project in a do-it-yourself approach for ongoing data movement, send it back to us when your project or subscription is complete.

○ **Storage Service with Cloud Import** ⓘ

Have Seagate take care of your mass data import to the cloud. Select the storage you need. Once you load your data onto the device(s), send them to Seagate for us to securely import to the cloud of your choice.

4. Add items to your shopping cart by clicking the Plus (+) icon or entering a quantity to the field below a product.

Select Configuration

Filter Product

| ALL | HDD | SSD |

Lyve Devices:

Lyve Mobile Shuttle (16TB HDD)
Product Details ↗
⊖ 0 ⊕

Lyve Mobile Shuttle (8TB SSD)
Product Details ↗
⊖ 2 ⊕

Lyve Mobile Array (96TB HDD)
Product Details ↗
⊖ 1 ⊕

Lyve Mobile Array (92TB SSD)
Product Details ↗
⊖ 0 ⊕

Click **Continue**.

5. Select the RAID level for each Mobile Array in your order. RAID options are RAID 0 and RAID 5 (default).

Select Configuration

Please select the RAID level for the Lyve Mobile Array. Configuration settings only apply to Lyve Mobile Array products. Any Lyve Mobile accessories or shuttles are not configurable.

Device	RAID Level
Lyve Mobile Array (96 TB HDD)	Please Select ▾ RAID 0 RAID 5 (Default)
Lyve Mobile Array (96 TB HDD)	

> ✎ Configuration settings only apply to Lyve Mobile Array devices. Lyve Mobile accessories or shuttles are not configurable and are not be displayed in this step. If no Lyve Mobile Arrays have been selected, you will automatically proceed to the next step.

Click **Continue**.

6. Fill in project details:
   - Project name
   - Project start and end date
   - Contact information
   - Shipping information

Click **Continue**.

7. Review your rate plan, project details, shipping address, and contact information. If you have a valid promo code, enter it in the order summary section.

8. Submit your order or request a quote from Seagate.

Creating a Systems Leasing project

1. On the Select Service Plan page, select **Systems Leasing** and click **Continue**.
2. Add items to your shopping cart by clicking the Plus (+) icon or entering a quantity to the field below a product. Click **Continue**.

> ✎ Professional installation services are available. Check the sidebar for more information.
>
> **System Installation**
>
> Learn more about Seagate JBOD system or CORVAULT system installations. Please contact your sales representative or the Lyve Virtual Assistant if you want to request professional installation services.

3. Fill in project details:
   - Project name
   - Project start date
   - Shipping information

   Click **Continue**.

4. Review your project details and shipping information. If you have a valid promo code, enter it in the order summary section.

   Promo Code

   | Apply Promo Code | Apply |

5. Upload proof of insurance. Accepted file formats: docx, doc, pdf.

   Insurance

   Insurance documentation is required for this order. Please upload your evidence of insurance prior to shipment. If you can't upload the documentation now, please refer to your Project Details page to upload later for your order to be fulfilled.

   Accepted format: docx, doc, pdf

   UPLOAD NOW

> ✎ Orders can be submitted without uploading insurance documentation at this time, however, orders will not be shipped until documentation has been provided. You can modify the project at a later time to upload documents. See How do I modify a project/deal registration?.

6. Submit your order or request a quote from Seagate.

Submit Order

ⓘ If you'd rather receive a quote from Seagate, **click here.**

How do I register a deal?

Solution Providers can register a **deal** with Seagate. For more information, see the following Deal Registration FAQ.

Register a deal

To register a deal:

1. Follow the steps to create a project.
2. On the Review Your Project page, scroll down to the Deal Registration section and check the **Deal Registration** checkbox.

3. Click Request Quote.

Deal Status

Once the quote is requested, Seagate begins the deal registration approval process. The status of the deal can be tracked on the Projects page in Lyve Management Portal. Until the deal is approved by Seagate, the status displayed will be **Deal Registered**. The status will update accordingly when the deal is approved or declined.

For a project to qualify as a registered deal, it must be both approved by Seagate and then converted to an order within 90 days of submitting the deal registration request. A deal will expire 90 days after you've submitted it for review, even if the deal has been approved. Contact your Lyve Sales representative to request an extension and resubmit the deal for approval. If you don't know who is your Lyve Sales representative, contact LyveMobilePartnerSuccess@seagate.com.

Once a deal is converted to an order, it will show up in Lyve Management Portal as a project and can no longer expire.

> 🖊 Customers of a Solution Provider cannot view deal registrations.

How do I modify a project/deal registration?

Modify a project after requesting a quote

If you've requested a quote for a project, you can modify the project and resubmit it up until the quote has been processed by Seagate.

1. Go to lyve.seagate.com and sign in. Enter a verification code to continue to Lyve Management Portal.
2. Click **Projects** in the navigation bar.

3. Click on a project.
4. Click **Modify Project**.
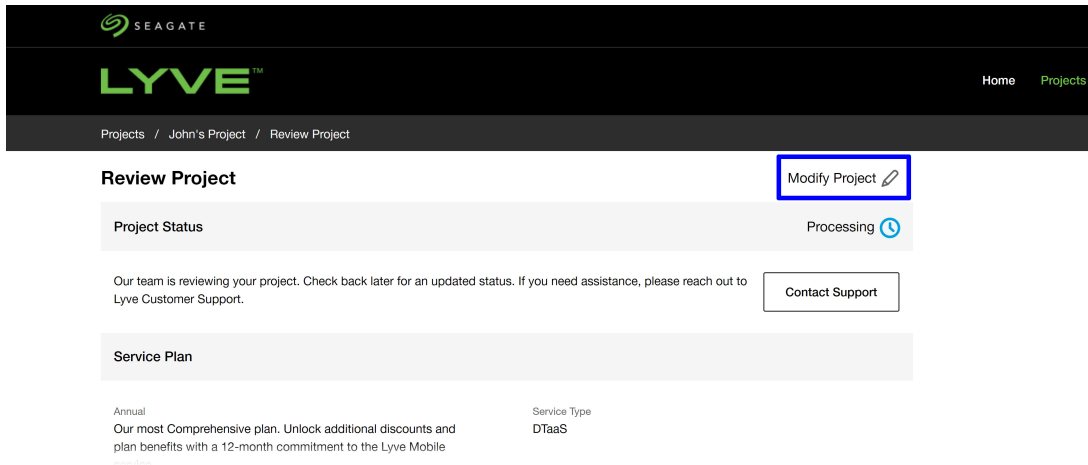
5. Edit the information.
6. To resubmit the quote for review, click the **click here** link.

Modify a deal registration

If you've requested a deal registration, you can modify it and resubmit it for review at any point up until it's converted to an order, regardless of the deal's status.

1. Go to lyve.seagate.com and sign in. Enter a verification code to continue to Lyve Management Portal.
2. Click **Projects** in the navigation bar.
3. Click on a deal registration.

4. Click **Modify Deal.**

5. Edit the information.
6. Click **Request Quote**.

Devices

Lyve Mobile Shuttle (8TB SSD)
Total Capacity: 8
Qty: 1

Deal Registration

We'd like to talk to you first! Please review and submit your request for a quote and a Lyve expert will be reaching out to you to finalize the details of your order.

☑ Check this box if you would like to register this project. For more information, check out our FAQs.

Terms and Conditions

☑ I have read and agreed to the following terms:

Lyve Data Transfer Service Terms ↗

By submitting you acknowledge that you have also read and accept the following:

Solution Provider & Lyve Management Portal Agreement ↗

Request Quote

How do I add a device to a project?

Devices can be added to a project by users with access to the master account as well as sub users. Devices cannot be added to Storage Service with Cloud import projects.

1. Go to lyve.seagate.com and sign in. Enter a verification code to continue to Lyve Management Portal.
2. Click **Projects** in the navigation bar.
3. Click on a project to go to the Project Details page.

4. Using the **Manage Project** dropdown menu, select **Add Devices**.
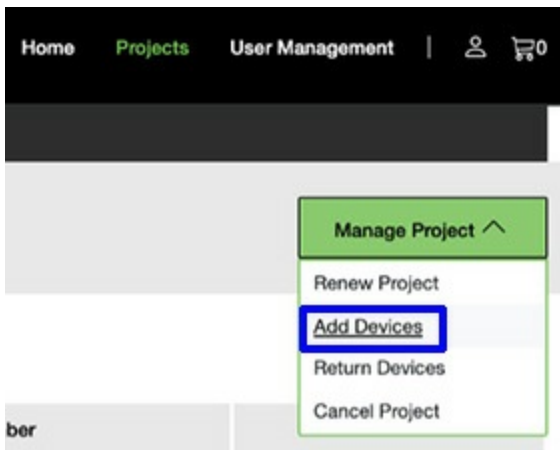
Note that devices can also be added by selecting **Add Devices** from the **Manage Devices** dropdown menu.
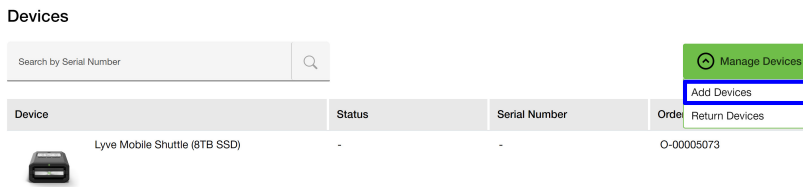
5. Add items to your shopping cart by clicking the Plus (+) icon or entering a quantity to the field below a product.
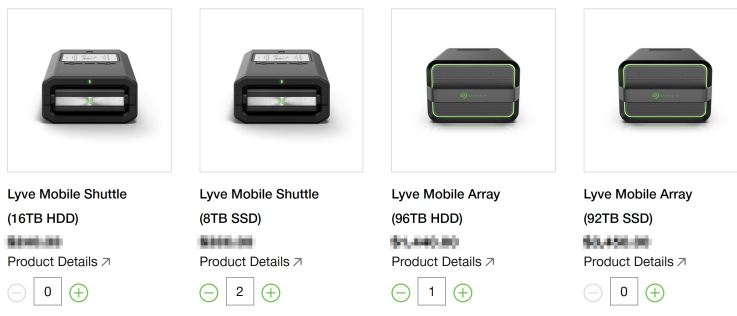
Click **Continue**.

6. Enter your shipping details and click **Continue**.

7. Review your project details and shipping information.

8. Submit your order or request a quote from Seagate.

Submit Order

ⓘ If you'd rather receive a quote from Seagate, click here.

How do I manage users in my account?

Add a new account user

1. Go to lyve.seagate.com and sign in. Enter a verification code to continue to Lyve Management Portal.
2. Click **User Management** in the navigation bar.
3. Click on the **Quick Action** dropdown menu and select**Add User**. Alternatively, click Add User in one of the user role descriptions.

4. Add new user details:
   - First name
   - Last name
   - Email address
   - Phone
   - User role
5. Click checkboxes to assign the user to active projects, and then click**Save**.

> ✎ If you're adding a new user that is already registered with another Lyve Management Portal account, the user will receive an email with a link to accept the invite to the added account. When the user clicks on the link, they'll sign in to Lyve Management Portal using their existing credentials and they'll be able to select the new account on sign in.
> **Note**—The same user can have different roles in different accounts

6. Click **Back to User Management**.

Edit an account user

1. Go to lyve.seagate.com and sign in. Enter a verification code to continue to Lyve Management Portal.
2. Click **User Management** in the navigation bar.
3. Scroll down to the Users section where you can view the name, email address, role, and status of users associated with the project. Click on the Edit icon next to a user.

4. Edit user details and project assignments, and then click **Save**.

5. Click **Return to User Management**.

Deactivate an account user

1. Go to lyve.seagate.com and sign in. Enter a verification code to continue to Lyve Management Portal.
2. Click **User Management** in the navigation bar.
3. Click on the **Quick Action** dropdown menu and click **View All Users**.

4. Click checkboxes to select one or more users.
5. Click on the **Action** dropdown menu and select **Deactivate**.

6. Confirm that you want to deactivate the user(s).

Delete an account user

1. Go to lyve.seagate.com and sign in. Enter a verification code to continue to Lyve Management Portal.
2. Click **User Management** in the navigation bar.
3. Click on the **Quick Action** dropdown menu and click**View All Users**.

4. Click checkboxes to select one or more users.
5. Click on the **Action** dropdown menu and select**Delete**.
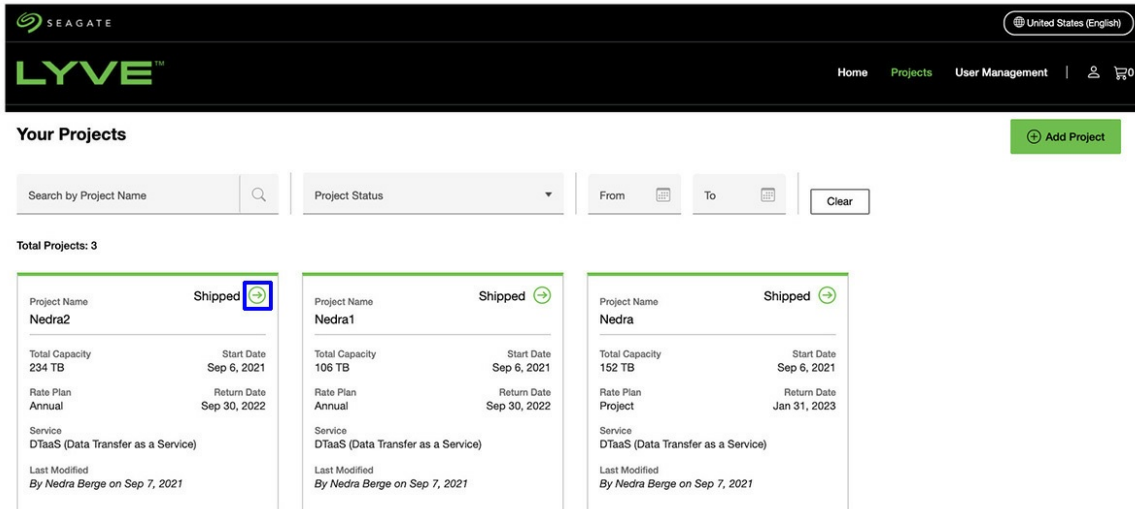

6. Confirm that you want to delete the user.

How do I manage users for a specific project?

Add a user to a project

1. Go to lyve.seagate.com and sign in. Enter a verification code to continue to Lyve Management Portal.
2. Click **Projects** in the navigation bar.
3. Click on a project to go to the Project Details page.

4. Scroll down to the Users section where you can view the name, email address, role, and status of users associated with the project. Click on**Manage Users** dropdown and select**Add Users**.
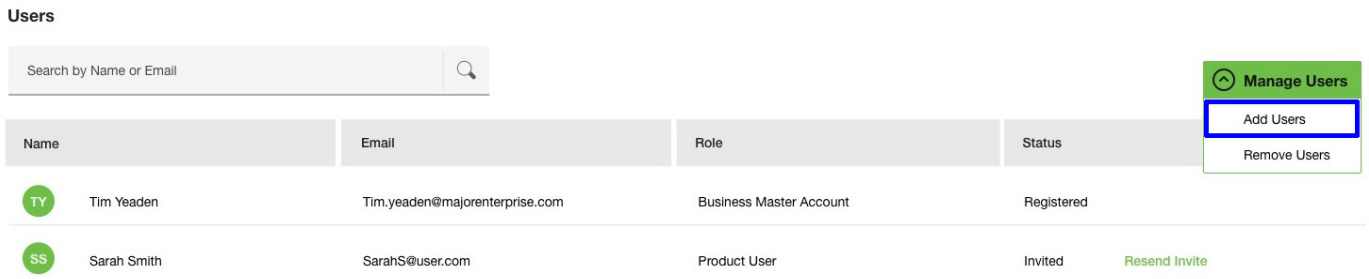
The Add Users form appears:

5. Enter an email address into the search bar and click on the Search icon to look for an existing user in the system. Alternatively, click **Add New User** to create a new user. You'll need the following details:
   - First name
   - Last name
   - Email address

- Phone
- User role

6. Click **Save**.

Remove a user from a project

1. Go to lyve.seagate.com and sign in. Enter a verification code to continue to Lyve Management Portal.
2. Click **Projects** in the navigation bar.
3. Click on a project to go to the Project Details page.

4. Scroll down to the Users section where you can view the name, email address, role, and status of users associated with the project. Click on**Manage Users** dropdown and select**Remove Users**.

5. On the Project Users page, click checkboxes to select users you want to remove from the project.

Project Users

⊕ Add User   ⊖ Remove Users

| Enter User Name or Email | 🔍 |

User Status
All   Invited   Registered

☐
Sarah Landon

Role
Solution Provider Mast…

Status
Registered

Email Address
emailabc@email.com

Reset Password   SL

☐
Jay Smith

Role
Product User

Status
Registered

Email Address
invited_user2@yopmail.com

JS

☑
Jason Lewis

Role
Product User

Status
Invited

Email Address
besovej652@3dinews.com

Resend Invite   JL

☑
Penelope Watson

Role
Product User

Status
Invited

Email Address
p_watson@email.com

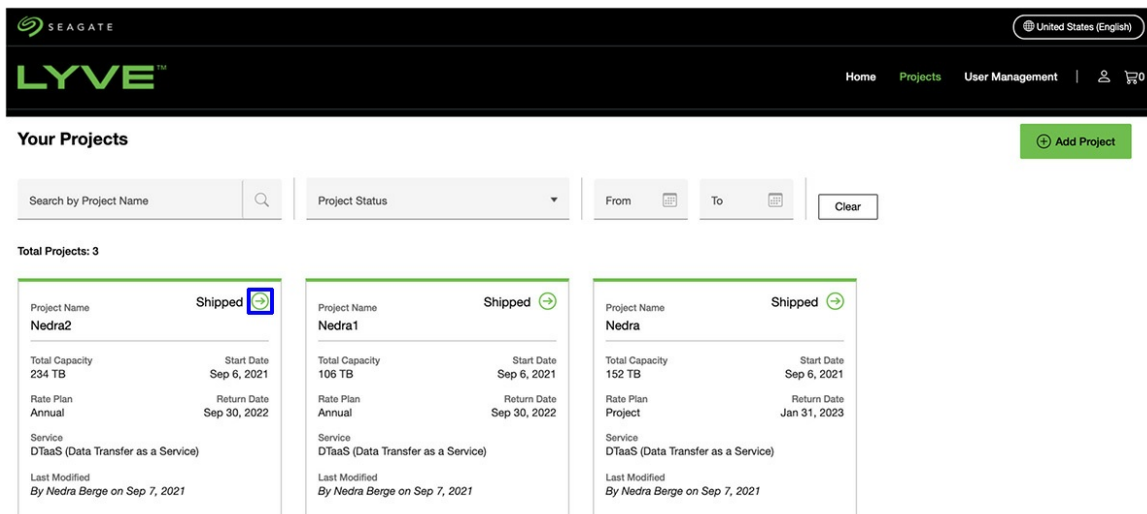Resend Invite   PW

Click **Remove Users**.

🖊 Note—Removing a user from a project does not remove them from the Lyve Management Portal account or other projects to which they may belong.

How do I return a device?

🖊 **Customers in UK, Sweden, and Norway**

Use the Lyve Virtual Assistant to request an end of service return or product exchange.

1. Go to lyve.seagate.com and sign in. Enter a verification code to continue to Lyve Management Portal.
2. Click **Projects** in the navigation bar.
3. Click on a project to go to the Project Details page.

4. Using the **Manage Project** dropdown menu, select **Return Devices**.

4. Using the **Manage Project** dropdown menu, select **Return Devices**.
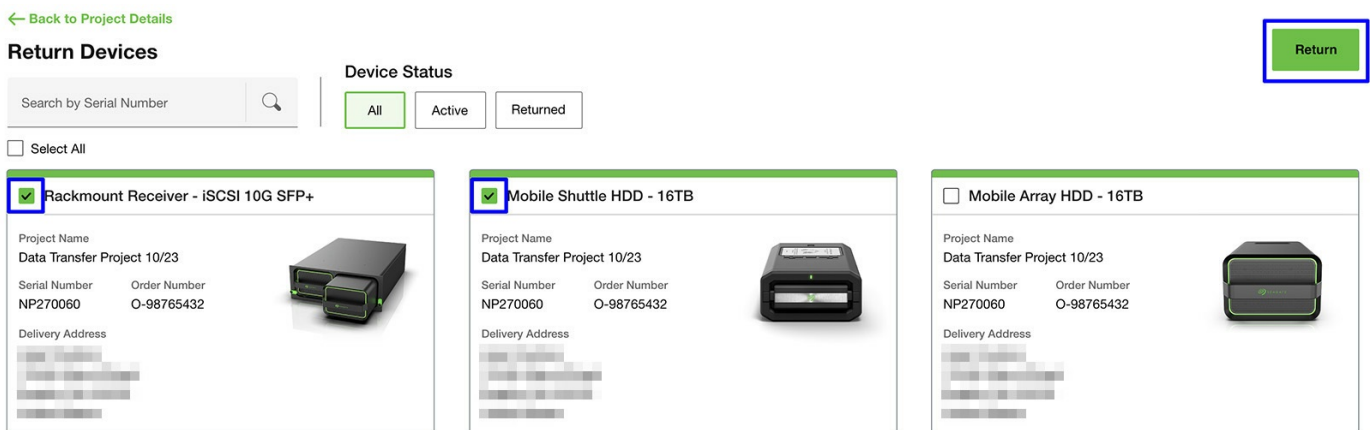

Note that devices can also be returned by selecting Return Devices from the Manage Devices dropdown menu.
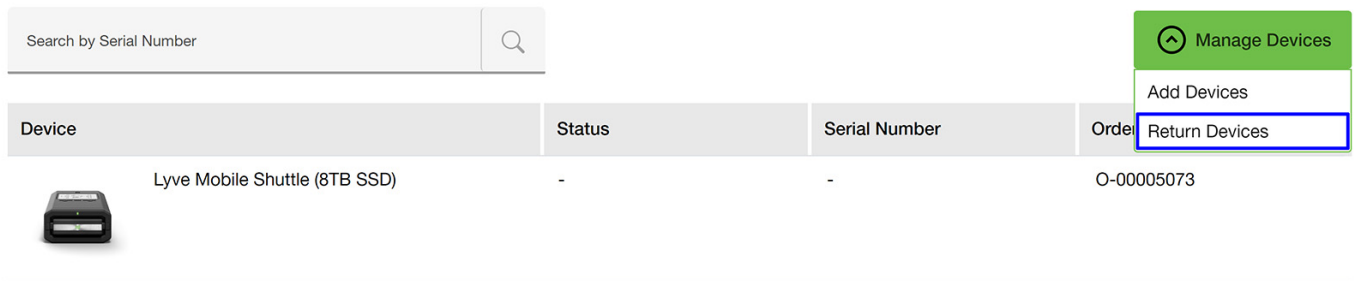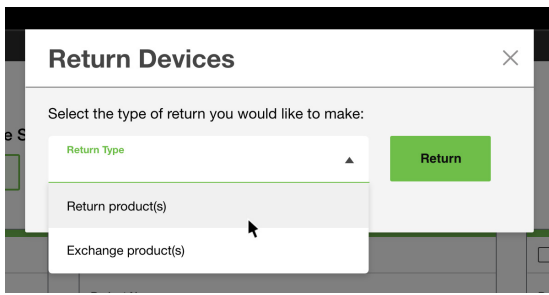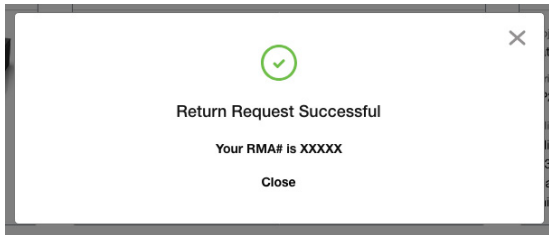

5. Click checkboxes to select the device(s) you would like to return, and then click **Return**.

6. Select the type of return you would like to make. If exchanging products, please provide a reason for the exchange.

7. Click **Return** to submit your request. If the return request is successful, a dialog will display your RMA number.

> ✎ The RMA number will be included in a confirmation email you receive. If you have any issues with the return/exchange, please reference the RMA number when contacting Lyve Support.

8. Check your email inbox for a message confirming your return request. The message contains the following items you'll need to return your device(s):
   - A link for printing a prepaid return shipping label
   - Shipping and packing instructions
9. Print out the shipping label and follow the shipping and packing instructions provided in the email.