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User Guide

XiO Cloud<sup>®</sup>

Management Portal

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### **Original Instructions**

The U.S. English version of this document is the original instructions.  
All other languages are a translation of the original instructions.

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# Introduction

The XiO Cloud® provisioning and management service allows all supported Crestron® devices and certain supported third-party devices across an enterprise to be managed and configured from one central, secure location in the cloud. The XiO Cloud service may be used to view the status of a device, to configure various device and network settings, to manage licenses, and to update device firmware.

**NOTE:** Third-party device management and configuration is supported by XiO Cloud Premium subscriptions only.

The XiO Cloud Management Portal provides Authorized Resellers and Crestron Service Providers (together, Authorized Support Providers) with the ability to easily view and access their customers' XiO Cloud accounts<sup>1</sup>. SSO (single sign-on) capabilities allow support providers to access the XiO Cloud Management Portal and to create a portal account for their organization directly through their [Crestron.com](https://www.crestron.com) web account.

This document provides instructions on how to enable access to the XiO Cloud Management Portal, log in, and use the web configuration interface to manage customer accounts.

For more details and additional resources, refer to <https://www.crestron.com/xiocloud>.

**NOTE:** This document is current as of the XiO Cloud version 2.0 release.

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<sup>1</sup> Authorized Support Provider access to customer XiO Cloud accounts is subject to authorization by the customer and to Crestron's XiO Cloud Monitoring Services Terms of Use, available at: [www.crestron.com/XiOMonitoringTOU](https://www.crestron.com/XiOMonitoringTOU).

# XiO Cloud Accounts

There are two different types of XiO Cloud accounts with varying functions and permissions:

- **Customer Account:** The customer account may also be referred to as a tenant. The customer account user interface allows the customer to view, provision, and manage supported devices within their XiO Cloud tenant based on their XiO Cloud subscription. Devices are organized into groups, rooms, or desks that are registered to the account.
- **XiO Cloud Management Portal Account:** The XiO Cloud Management Portal allows support providers to create a portal account to access associated customer accounts from one location. The XiO Cloud Management Portal provides two user roles (Integrator Admin and Integrator User).

The following table defines the Integrator Admin and Integrator User roles within the XiO Cloud Management Portal.

## XiO Cloud Management Portal User Roles

User Role	Scope
<b>Integrator Admin</b>	Integrator Admins assign customer accounts to Integrator Users. Integrator Admins are added automatically to customer accounts as a <b>Standard User</b> with <b>Viewer</b> permissions. Elevated permissions can be granted by a Global Administrator within the customer account. Refer to the "Manage User Access" within the <a href="#">XiO Cloud® Provisioning and Management Service User Guide</a> for more information on customer account permissions.
<b>Integrator User</b>	Integrator Users are only able to view customer accounts to which they have been assigned. Integrator Users are added automatically to customer accounts as a <b>Standard User</b> with <b>Viewer</b> permissions after the accounts are assigned by an Integrator Admin. Elevated permissions can be granted by a Global Administrator within the customer account. Refer to the "Manage User Access" within the <a href="#">XiO Cloud® Provisioning and Management Service User Guide</a> for more information on customer account permissions.

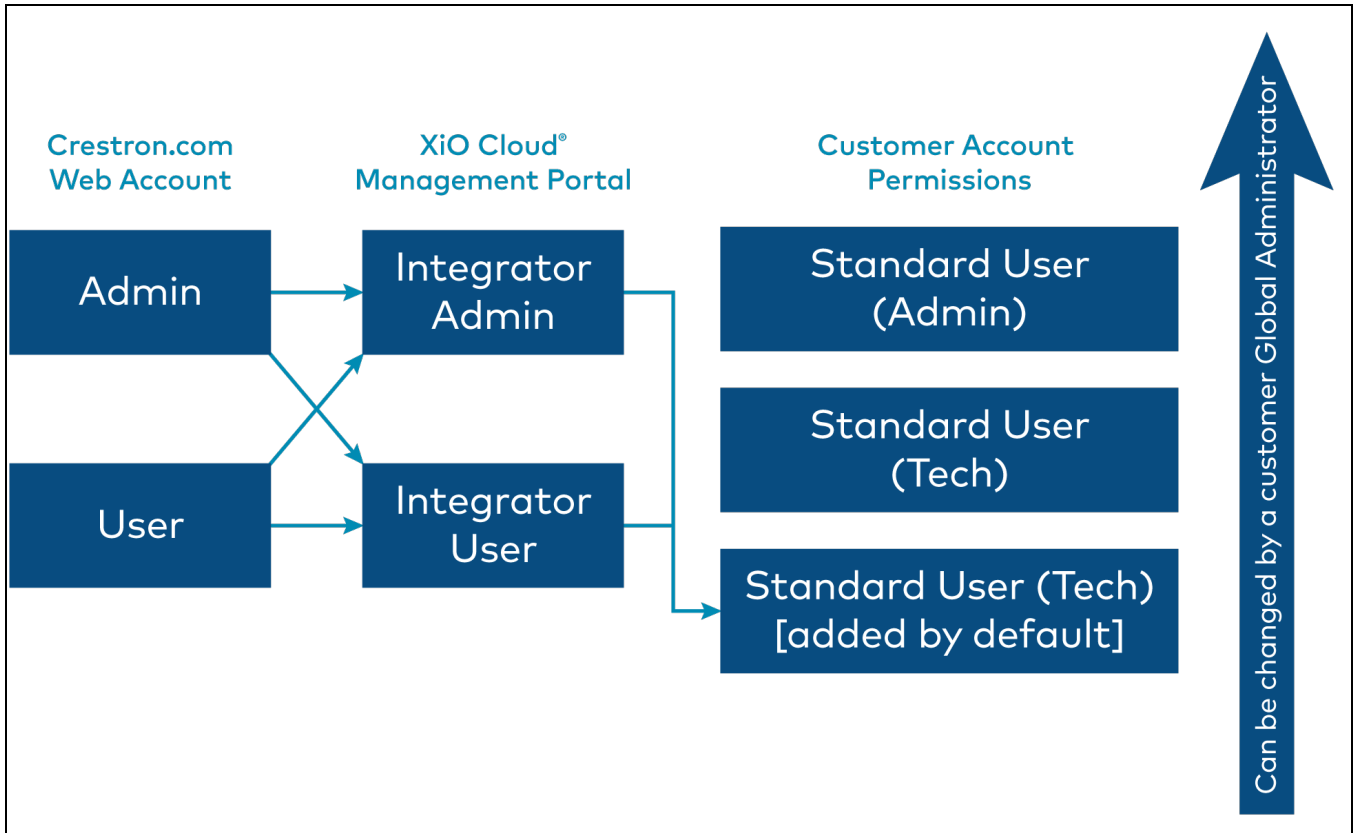
Integrator Users will not see any customer accounts in the XiO Cloud Management Portal until they are granted access to the accounts by an Integrator Admin. Therefore, at least one Integrator Admin should be added to the XiO Cloud Management Portal before adding any Integrator Users.

For customer convenience, one portal account user should be elevated to a **Standard User** with **Admin** permissions within the customer account, as this will allow the elevated user to add other portal account users to the customer account.

**NOTE:** Crestron strongly recommends that portal account users should not be elevated to Global Administrators within the customer account.

Refer to the following diagram for more information on the relationship between portal account users and customer account permissions.

### XiO Cloud Management Portal User Role Mapping



# Enable Portal Account Access

Access to the XiO Cloud Management Portal must be enabled in the support provider's Crestron.com account before the portal account can be accessed.

**NOTE:** Support providers must have a Crestron.com account with applicable permissions in order to use the XiO Cloud Management Portal. For more information on creating a Crestron.com web account, refer to [www.crestron.com/register](http://www.crestron.com/register).

1. Log into your account at [www.crestron.com](http://www.crestron.com).
2. Navigate to **My Account > Administration**.
3. Select the **Application Access** tab and scroll to the **XiO Cloud Management Portal** section.

XiO Cloud Management Portal

The XiO Cloud Management Portal enables your company to create a Portal Account in order to conveniently manage and support associated rooms in your customers' XiO Cloud accounts from one convenient location, subject to your customers' authorization and Crestron's XiO Cloud Monitoring Services Terms of Use, available at: <https://www.crestron.com/XiOMonitoringTOU>.

Select Yes to Register for a Portal Account. Users associated with your Crestron.com account can be granted access to the Portal Account by checking the box next to their name in the XiO Cloud Management Portal section below. Please refer to the XiO Cloud Management Portal User Guide for more information on role assignment. To access your Portal Account, click the XiO Cloud Management Portal link below.

By registering your company for an XiO Cloud Management Portal Account, you agree to the [Cloudware License Agreement & Addendum](#), [Internet Privacy Statement](#), and the [XiO Cloud Monitoring Services Terms of Use](#).

Yes  No

4. Fill the **Yes** radio button and select **Register**.
5. Expand the **XiO Cloud Management Portal** accordion under the **Manage Application Access** section.

- XiO Cloud Management Portal

Refer to the [XiO Cloud Management Portal User Guide](#) for more information on role assignment.

<input type="checkbox"/> Adam Perk (aperk@crestron.com)	Integrator User
<input type="checkbox"/> Brian Cocre (bcocre@crestron.com)	Integrator User
<input checked="" type="checkbox"/> Gaura Gob (ggob@crestron.com)	Integrator Admin

6. Manage access and permissions for account users:

- Fill the checkbox next to a user's name to allow that user to access the XiO Cloud Management Portal.
- Use the drop-down menu to select whether the user is an **Integrator User** or an **Integrator Admin**. Refer to [XiO Cloud Accounts on page 2](#) for more information on these roles within the portal account.

7. Select **Save** to update the account settings.

All user management for the portal account occurs within Crestron.com. A user with admin permissions on the support provider's Crestron.com account can add or remove another user's access to the associated portal account.

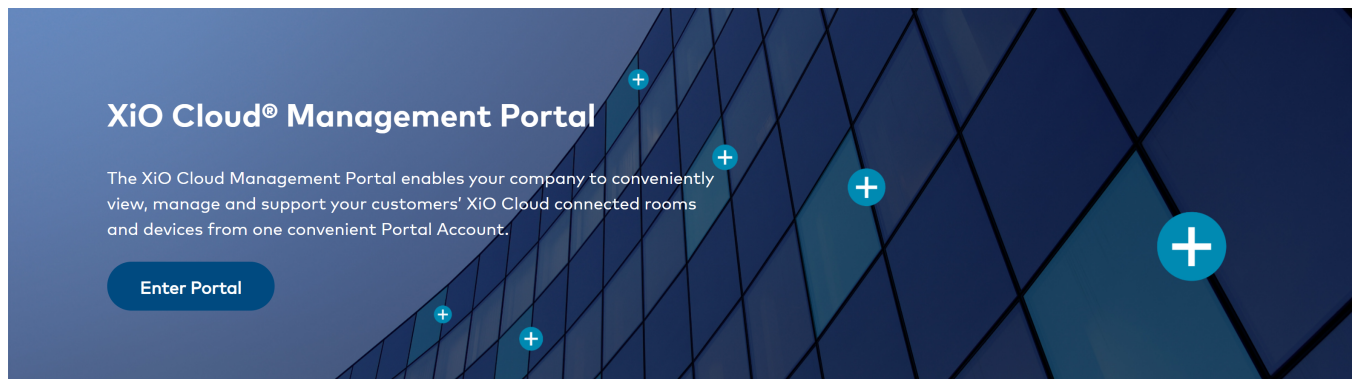


# Portal Account Login

Once the XiO Cloud Management Portal has been enabled as described in [Enable Portal Account Access on page 4](#) and at least one Crestron.com user has been assigned portal account access, the portal account can be accessed directly from the Crestron.com website home page.

**NOTE:** The support provider user must be logged into Crestron.com with the applicable web account credentials to access the portal account.

## XiO Cloud Management Portal Banner

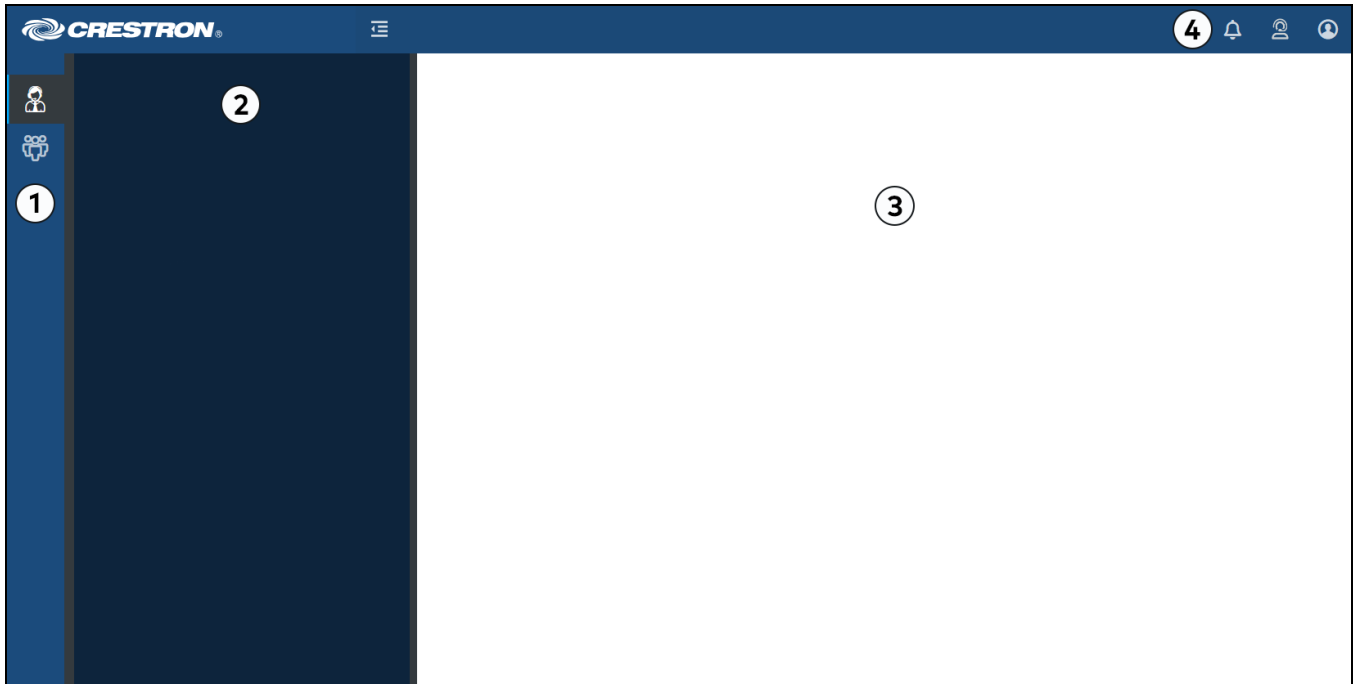


Scroll to the **XiO Cloud® Management Portal** banner and select **Enter Portal**. The support provider user is logged into the portal account automatically via SSO using their web account credentials.





**NOTE:** User access to the portal account must first be authorized as described in [Enable Portal Account Access on page 4](#).

Upon successful login, the user is redirected to the XiO Cloud Management Portal account.

### XiO Cloud Management Portal Account




The XiO Cloud Management Portal user interface comprises the following sections. The numbers in the list below correlate to the numbers shown in the image on the previous page.

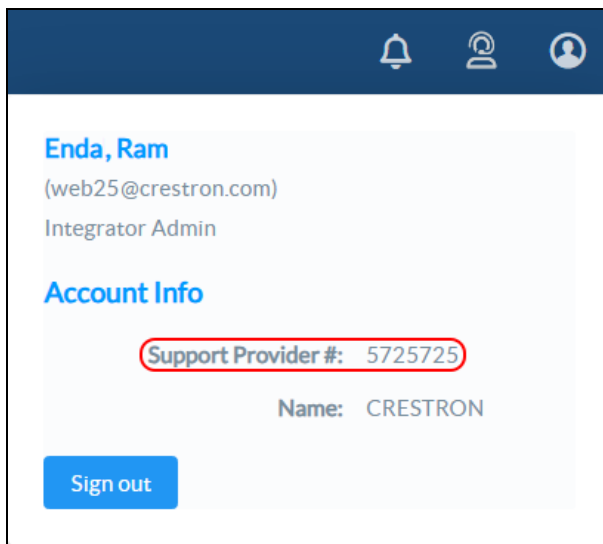
1. The navigation menu is used to navigate through the user interface. For more information, refer to [Navigate the Portal Account on page 9](#).
2. The left pane provides additional menus or items based on the selected navigation button. For example, selecting the **Accounts** button  will display a list of associated customer accounts.
3. The right pane provides user interface controls for the selected menu item. For example, selecting a customer account from the left pane will display controls to view the customer account settings.
4. The following informational controls are provided on the top of the user interface:
  - Select the alerts button  to display recent What's New messages for the XiO Cloud service.
  - Select the support button  to display options for contacting Crestron True Blue support via email, chat, or phone.
  - Select the profile button  to display the user profile window, which contains the support provider number and controls to log out of the user interface.

# Customer Account Authorization

A portal account user can access a customer's account via the XiO Cloud Management Portal only after being authorized by the customer. For more information on how to authorize support provider access to a customer account, refer to "Manage Support Providers" in the [XiO Cloud® Provisioning and Management Service User Guide](#).

The support provider must provide their XiO Cloud Management Portal account ID to the customer as part of the authorization process. To locate the XiO Cloud Management Portal account ID, select the user profile button  on the top right of the user interface. The user profile menu is displayed.

## User Profile Menu

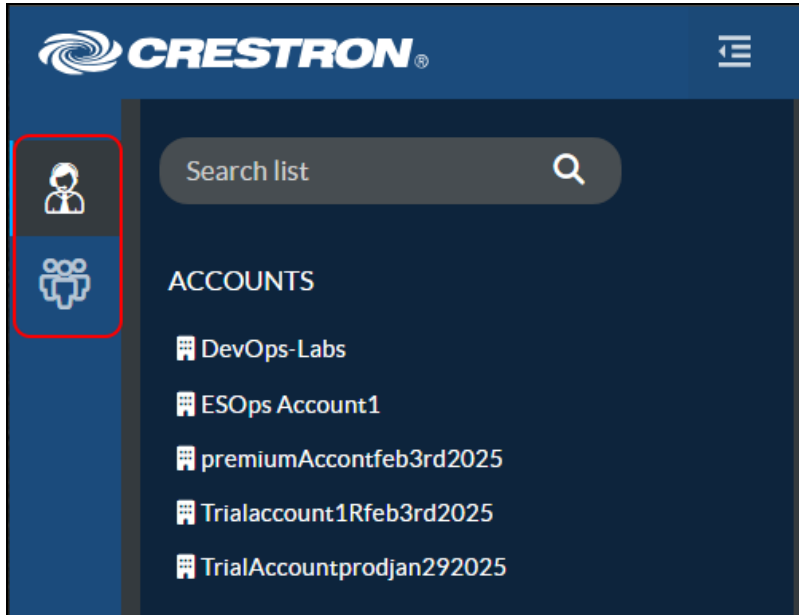


The account ID is the seven-digit number listed next to **Support Provider #** as shown in the image above.



# Navigate the Portal Account


The XiO Cloud Management Portal provides a navigation menu on the left of the page. The navigation menu is used to access the primary functions of the portal.



## Navigation Menu



The following navigation controls are provided:


- Select the **Accounts** button  to access the accounts menu, which contains all associated customer accounts that the portal account user is authorized to manage.
- Select the **Users** button  to view portal account users. User management occurs within the support provider's Crestron.com web account.

Certain navigation controls show an expanded menu when selected. For example, selecting the **Accounts** button  shows the accounts menu in the expanded menu.

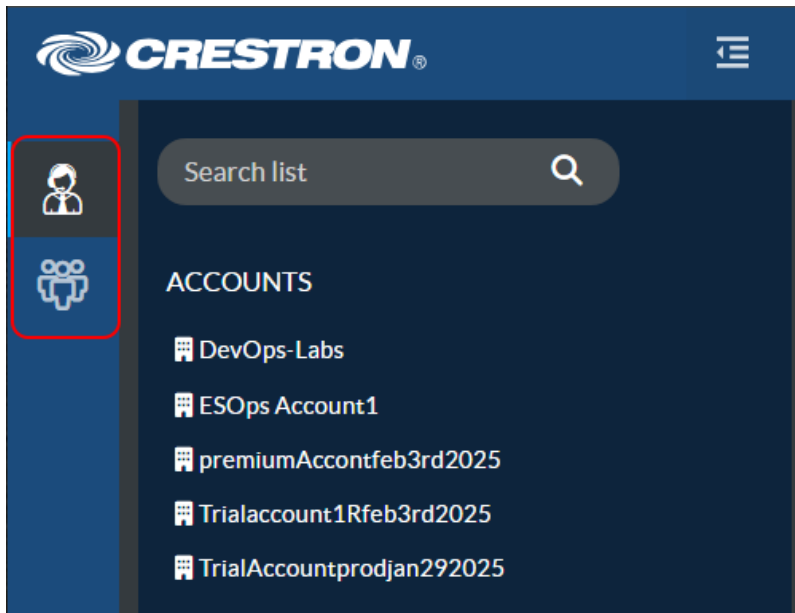
- Expanded menus can be collapsed by selecting the collapse button  in the header bar.
- When the menu is collapsed, select the expand button  to display the menu again.

# Manage Customer Accounts

Customers can allow support providers to manage and access their XiO Cloud accounts via the XiO Cloud Management Portal. Customers can revoke a support provider's access to their XiO Cloud customer account at any time. For more information, refer to the [XiO Cloud® Provisioning and Management Service User Guide](#).

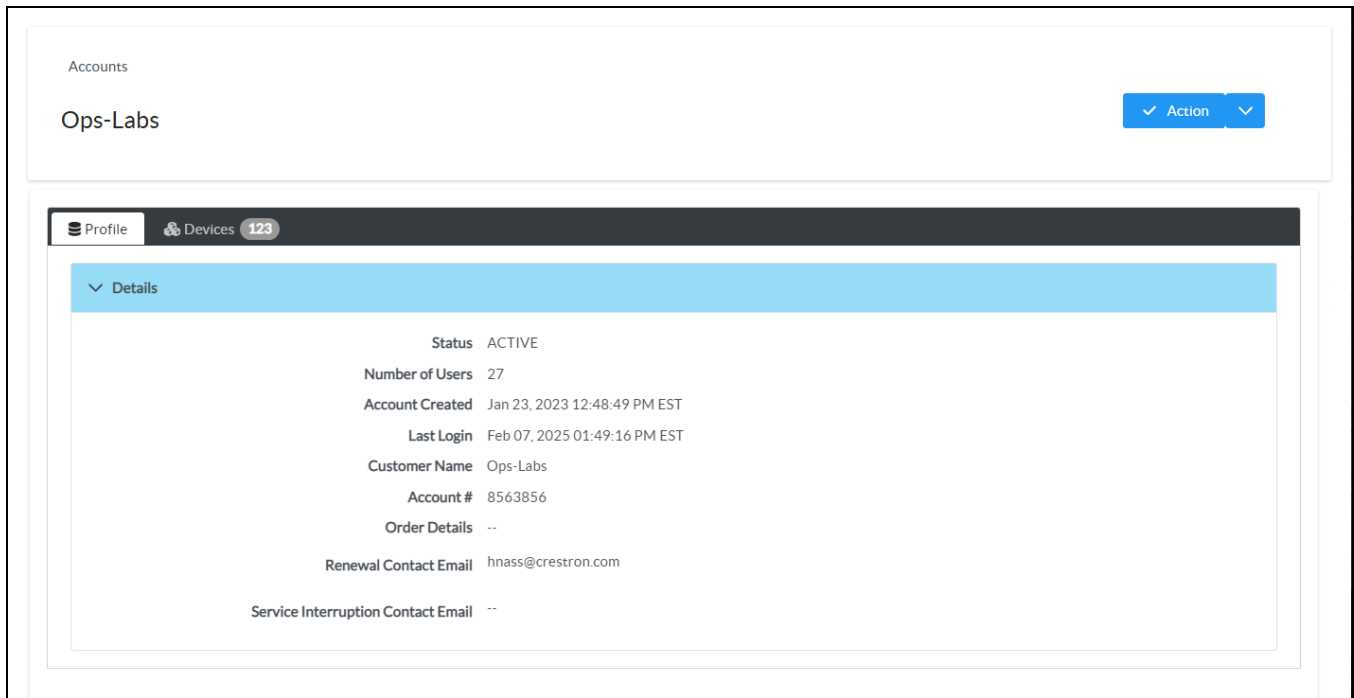
Select the **Accounts** button  from the navigation menu to show all customer accounts that the portal account user is authorized to manage. Customer accounts are ordered alphabetically.

## Accounts Menu



Select a customer account from the menu to view the status of the account.

### Accounts Page - Profile Tab



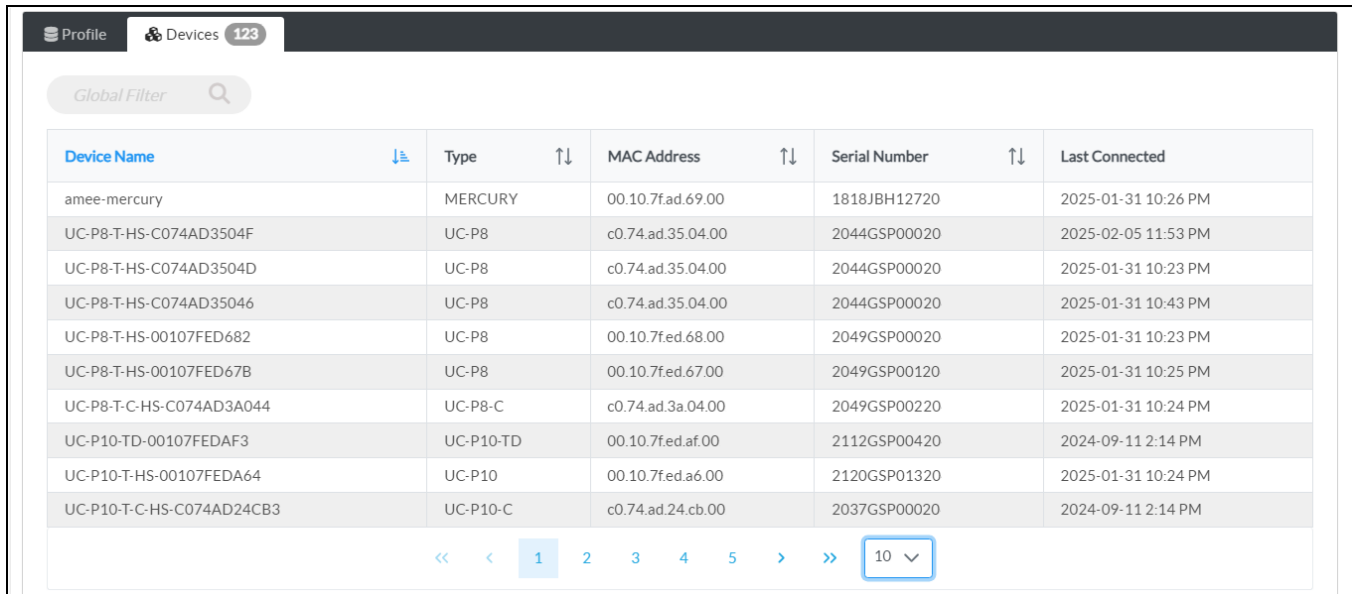
## Profile Tab

Select the **Profile** tab (open by default) to view the following details about the customer account:

- **Status:** Indicates whether the customer account is currently active.
- **Number of Users:** The number of active users within the customer account.
- **Account Created:** The date and time the customer account was created by Crestron.
- **Last Login:** The date and time that a user last logged into the customer account.
- **Customer Name:** The name of the customer account.
- **Account #:** The Crestron account number for the customer account.
- **Order Details:** The active Crestron purchase orders (PO) related to the customer account.
- **Renewal Contact Email:** An email address for the individual who is responsible for renewing the customer account.
- **Service Interruption Contact Email:** An email address for the individual who should receive any service interruption notices for the customer account.

# Devices Tab

Select the **Devices** tab to view all devices claimed into the customer account. The total number of devices is displayed next to the tab, making it easy to determine the current device count for XiO Cloud Premium accounts.



Device Name	Type	MAC Address	Serial Number	Last Connected
amee-mercury	MERCURY	00.10.7f.ad.69.00	1818JBH12720	2025-01-31 10:26 PM
UC-P8-T-HS-C074AD3504F	UC-P8	c0.74.ad.35.04.00	2044GSP00020	2025-02-05 11:53 PM
UC-P8-T-HS-C074AD3504D	UC-P8	c0.74.ad.35.04.00	2044GSP00020	2025-01-31 10:23 PM
UC-P8-T-HS-C074AD35046	UC-P8	c0.74.ad.35.04.00	2044GSP00020	2025-01-31 10:43 PM
UC-P8-T-HS-00107FED682	UC-P8	00.10.7f.ed.68.00	2049GSP00020	2025-01-31 10:23 PM
UC-P8-T-HS-00107FED67B	UC-P8	00.10.7f.ed.67.00	2049GSP00120	2025-01-31 10:25 PM
UC-P8-T-C-HS-C074AD3A044	UC-P8-C	c0.74.ad.3a.04.00	2049GSP00220	2025-01-31 10:24 PM
UC-P10-TD-00107FEDA63	UC-P10-TD	00.10.7f.ed.af.00	2112GSP00420	2024-09-11 2:14 PM
UC-P10-T-HS-00107FEDA64	UC-P10	00.10.7f.ed.a6.00	2120GSP01320	2025-01-31 10:24 PM
UC-P10-T-C-HS-C074AD24CB3	UC-P10-C	c0.74.ad.24.cb.00	2037GSP00020	2024-09-11 2:14 PM

The following details are provided for each device:

- The name and model
- The MAC address and serial number
- The date and time when the device last connected to the XiO Cloud service

Enter text into the **Global Filter** text box to search for and display devices that match the search terms.

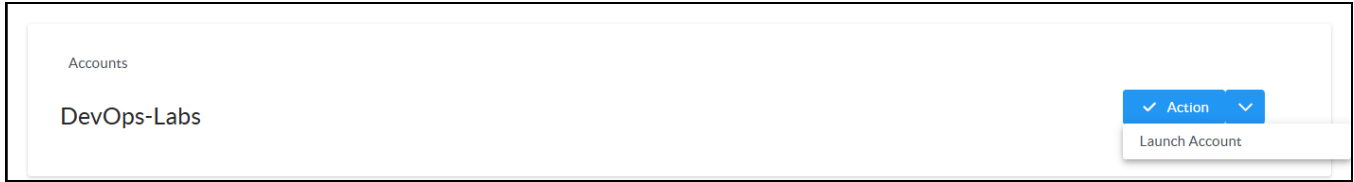
If the device lists spans multiple pages, use the navigation arrows on the bottom of the page to move forward or backward through the pages, or select a page number to navigate to that page. Additionally, the number of devices displayed on each page may be set to 5, 10, 20, or 25 devices.

## Launch Customer Account

Select **Launch Account** from the **Action** drop-down menu on the top-right of the page to access the associated customer account. The portal account user is able to access licensed rooms in the customer account via SSO without having to enter the customer account credentials.

**NOTE:** The portal account user can only access rooms that have been assigned to them by a Global Administrator within the customer account user interface. Refer to the "Manage User Access" within the [XiO Cloud® Provisioning and Management Service User Guide](#) for more information on customer account permissions.


## Actions Menu - Launch Account



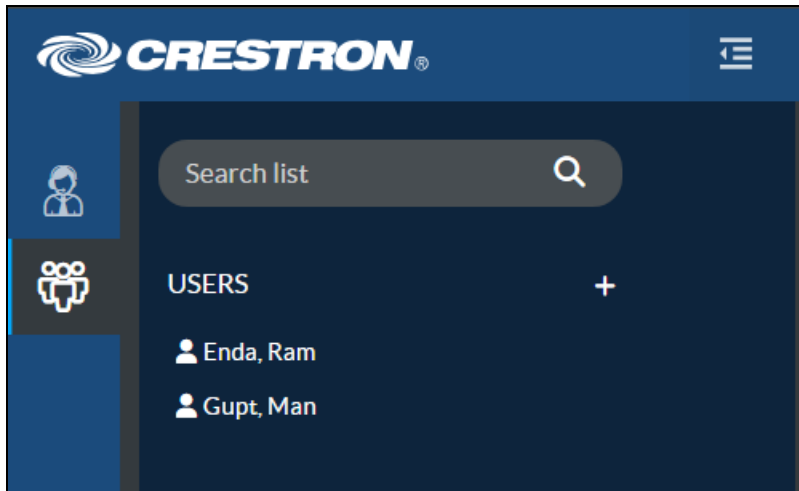
The associated customer account user interface opens in a new browser window.



# Manage Portal Account Users

Select the **Users** button  from the navigation menu to show all users that have been granted access to the XiO Cloud Management Portal account. Portal account users can be added or removed via the support provider's Crestron.com account.

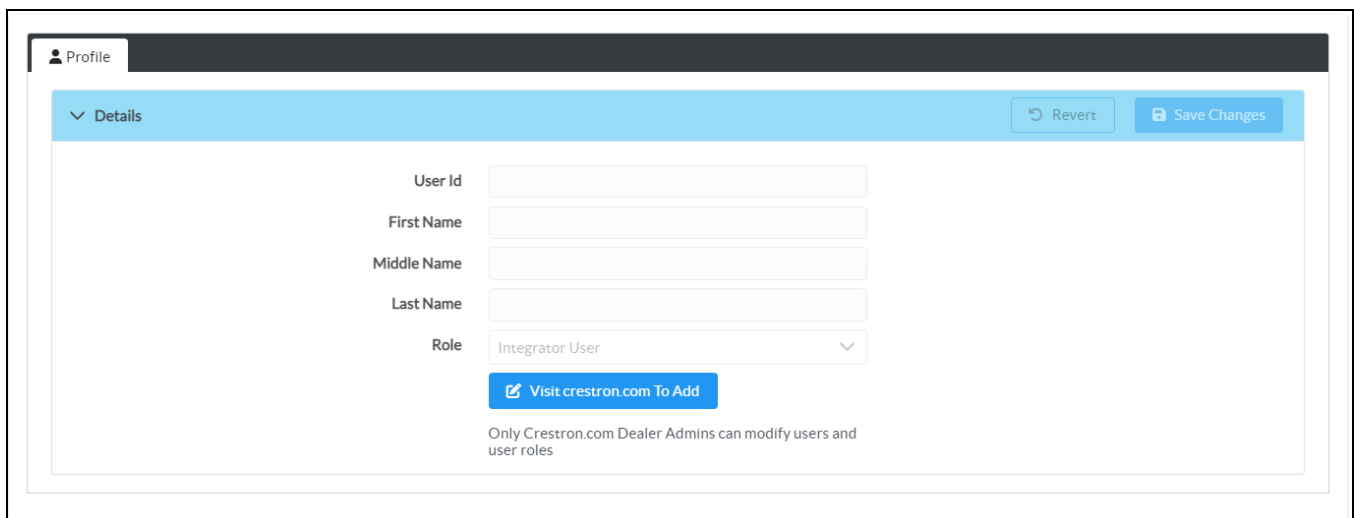
## Users Menu



## Add a New User

Select the + (plus) button at the top right of the **Users** menu to add a new portal account user. The **Users** page is displayed with a **Profile** tab opened.

### Users Page - Profile Tab (Add New User)

A screenshot of the 'Profile' tab in the Crestron user management interface. The page has a dark header with a 'Profile' tab label. Below the header, there's a light blue bar with a 'Details' dropdown, a 'Revert' button, and a 'Save Changes' button. The main form area contains several input fields: 'User Id', 'First Name', 'Middle Name', and 'Last Name'. Below these is a 'Role' dropdown menu currently set to 'Integrator User'. A blue button with a link icon and the text 'Visit crestron.com To Add' is positioned below the role dropdown. At the bottom of the form, a note states: 'Only Crestron.com Dealer Admins can modify users and user roles'.

Select **Visit crestron.com To Add** to add a new portal account user via the support provider's Crestron.com account. The Crestron website is opened in a new window. Refer to [Enable Portal Account Access on page 4](#) for more information.

**NOTE:** Portal account users cannot be added within the portal account. Only admin users can add new portal account users within the support provider's Crestron.com account.

## Edit a User

Select a portal account user from the menu to view their user profile. Alert messages can also be configured for the user from within the portal account.

### Profile Tab

The **Users** page is displayed with a **Profile** tab opened.

#### Users Page - Profile Tab (Edit a User)

The screenshot shows the 'Users' page with the 'Profile' tab selected. The user profile for 'Enda, Ram' is displayed. The 'Details' section includes the following information:

- Account Name: CRESTRON QE
- User Name: web@crestron.com
- First Name: Ram
- Middle Name: (empty)
- Last Name: Enda
- Identity Provider: External Domain
- Role: Integrator Admin
- Buttons: [Visit crestron.com To Edit](#), [Revert](#), [Save Changes](#)
- What's New Message:
- Alert Email:
- Alert Mobile Phone:

Below the role, a note states: 'Only Crestron.com Dealer Admins can modify users and user roles'.

Select **Visit crestron.com To Edit** to edit a portal account user via the support provider's Crestron.com account. The Crestron website is opened in a new window. Refer to [Enable Portal Account Access on page 4](#) for more information.

**NOTE:** Portal account users cannot be edited within the portal account. Only admin users can edit portal account users within the support provider's Crestron.com account.

The following user settings can be managed from the portal account:

- Turn on the **What's New Message** toggle to allow the user to receive periodic messages regarding new XiO Cloud service features and functions. For more information, refer to "What's New Message" in the [XiO Cloud Provisioning and Management Service User Guide](#).
- If alerts are enabled in the XiO Cloud customer account(s), enter an email or phone number in the **Alert Email** and **Alert Mobile Phone** text fields, respectively, to receive alert messages via the chosen communication method. For more information, refer to "Alerts" in the [XiO Cloud Provisioning and Management Service User Guide](#).

## Access Tab

Select the **Access** tab to view the customer accounts that the portal user can access from the portal account. By default, Integrator Admin users have access to all paired customer accounts. Integrator Admins can assign customer account access to Integrator Users through the XiO Cloud Management Portal.

**NOTE:** A portal account user can access a customer's account via the XiO Cloud Management Portal only after being authorized by the customer. If the support provider has previously created a user in the customer account (not through the portal account), that user must be managed manually. Therefore, Crestron recommends deleting any previous support provider users in the customer account once portal account user access has been authorized.

### Users Page - Access Tab

Account	Access
DevOps-Labs	<input checked="" type="checkbox"/>
ESOps Account1	<input checked="" type="checkbox"/>
TrialAccountprodjan292025	<input checked="" type="checkbox"/>
Trialaccount1Rfeb3rd2025	<input checked="" type="checkbox"/>
premiumAccontfeb3rd2025	<input checked="" type="checkbox"/>

