



Getting Started as a SaaS Partner



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Welcome

Anchor is a secure and reliable file synchronization software platform that is branded and managed by partners. As a partner, you can help your customers collaborate, synchronize content from multiple devices, and back up important files and folders, all from a single platform.

Anchor is managed by *organization administrators* and used by *end users*.

- *Organization administrators* manage Anchor through the administrative web portal, which serves as a central location for supporting and managing end users' files, folders, and shares. As a partner, you might act as an organization administrator, or you might designate this role to someone else.
- *End users* access their files, folders, and shares through the web portal as well as through desktop clients, which are deployed to a multitude of endpoints, including desktops, laptops, and mobile devices.

This document provides you with information about getting started with the Anchor SaaS model.

Step 1: Review the Anchor Knowledgebase

The Knowledgebase is designed to support you by providing a central repository of information, including

- Updates and important communications,
- Documentation and instructions related to Anchor,
- A collection of questions and answers,
- Instructional videos, and
- Troubleshooting suggestions.

To use the Anchor Knowledgebase:

1. Navigate to the [Knowledgebase](#). The *Anchor Knowledgebase* page displays, providing access to important updates and communications related to Anchor. We suggest that you bookmark this page so that you can easily access the most current information.
2. Use the various sections to browse for important topics related to Anchor. You can also use the search bar to search for specific questions you might have.



Note: To improve search results, place quotation marks around specific phrases or key words.

3. If you cannot find the information you are looking for, please submit a [Support Ticket](#).

Step 2: Become Familiar with Anchor

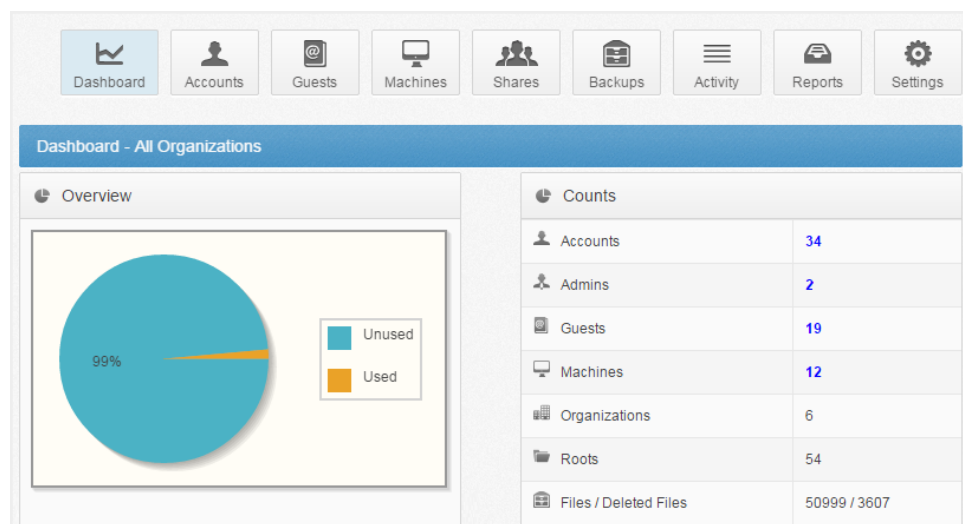
After you explore the Anchor Knowledgebase, you might find it useful to navigate and become familiar with Anchor, including its architecture, security features, and specific instructions on how to use the administrative web portal.

The following checklist will help you become familiar with Anchor, and includes links to informational documents and videos in the Anchor Knowledgebase.

- Learn about [Anchor's architecture and security features](#), including information about system requirements, encryption, remote data wipe capabilities, and password-complexity requirements.
- Explore the [full product demonstration](#), from both the administrative perspective and end user perspective.
- Learn detailed information about the [administrative web portal](#), including specifics on how to manage day-to-day administrative tasks.
- Review the basics of cloud-enabling a server (called [File Server Enablement](#)), which allows you to map a folder or network path on a registered machine.
- Learn about [Team Shares](#), which allow groups of users to share, sync, and collaborate on files and folders.
- Understand the list of system hard-coded [excluded folders and extensions](#), which are configured to prevent the syncing of system files and folders.
- Learn about [roots](#), or buckets of data, within Anchor.
- Learn about how Anchor handles [file conflicts and collisions](#).

Step 3: Create and Configure Organizations

After becoming familiar with Anchor, system administrators can create and manage organizations and suborganizations internally and for their customers. Administrative tasks are performed within the administrative web portal, which gives you access to various dashboards, tools, and reports.



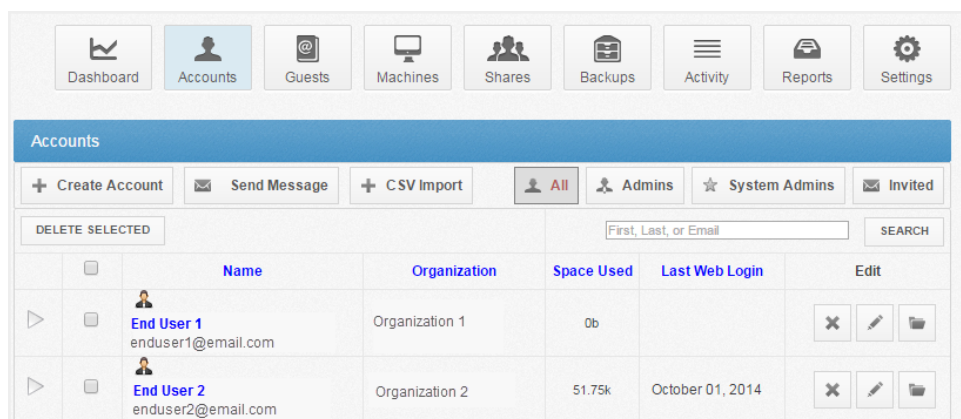
The following checklist will help you create and configure organizations, and includes links to informational documents and videos in the Anchor Knowledgebase.

- Create organizations—either for your own use or for your customers—and specify [organization settings](#), an [organization slug](#), [excluded extensions](#), and other policies.
- Optionally, create [service plans](#), which are bundles of features and policies that your customers can opt-into through a registration form. When your customers submit registration forms, they are given access to a trial of Anchor.
- Configure an [email server](#).
- Set up your own [custom branding](#).
- Set up [File Server Enablement](#), so that you can map folders and network paths on any registered machine.
- Optionally, integrate with a PSA system, such as [Autotask](#) or [ConnectWise](#).
- Create [backups](#); backups will keep an extra copy of a file or folder on the server.
- Learn how to configure and use [Team Shares](#) as an organization administrator.

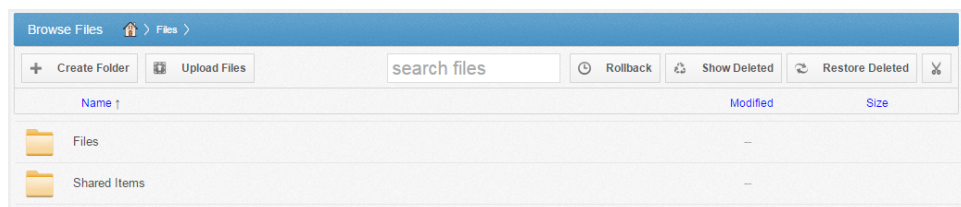
- Optionally, turn on [Privacy Mode](#), which prevents organization administrators from viewing potentially sensitive data within lower-level organizations. Please note that this feature cannot be turned off after it is turned on.

Step 4: Create User Accounts and Support End Users

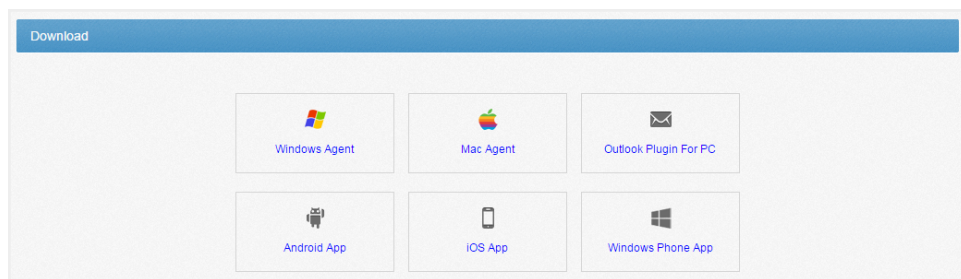
After creating organizations and suborganizations, system administrators can create user accounts manually, from an authentication source (Active Directory), or import user accounts from a CSV file. User accounts can also be organized within Groups.



When new user accounts are created, these end users receive an email with account information and a link to access the web portal.



From the web portal dashboard, end users will see files and folders, and will also have the ability to download a desktop client to their local machines, and use it to manage and upload files and folders to the cloud. End users can also download and install tablet or smart phone apps—including apps for Android devices, iOS devices, and Windows Phones—to access their files and folders.

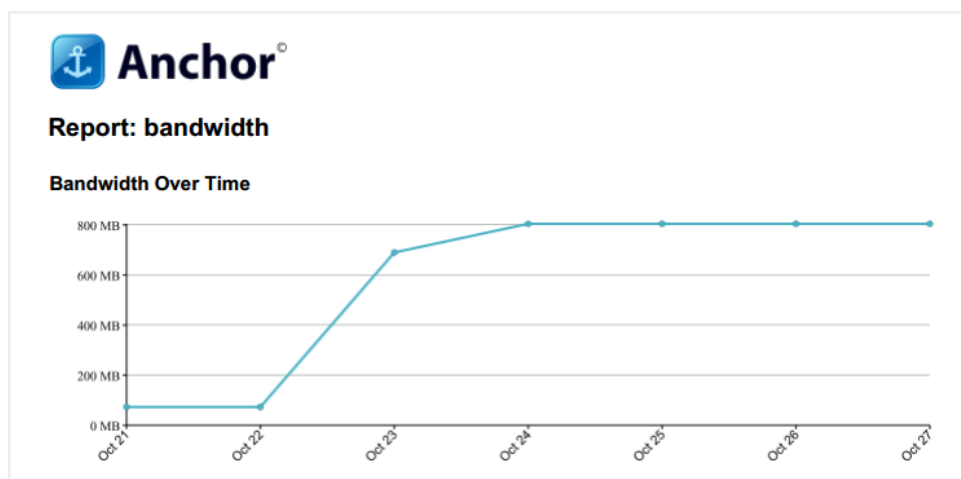


The following checklist will help you create new accounts and support end users, and includes links to informational documents and videos in the Anchor Knowledgebase.

- Download, read, and customize the End User Guide, which can be distributed to your end users with your own custom branding.
- Optionally, create [Groups](#) to help organize user accounts according to department or role.
- Optionally, [customize welcome and share email templates](#) that are distributed to users and guest users.
- Configure an authentication source, such as [Active Directory](#), so that you can easily import user accounts. Alternatively, you can manually create user accounts, or import user accounts from a CSV file.
- Review how end users download and configure [desktop clients](#) and [mobile apps](#) to sync files across all of their devices.
- Review how end users use [share content](#).
- Learn how end users download and configure the [Outlook add-in](#), which allows them to share files and folders through Microsoft Outlook.
- Learn how end users create [backups](#), either from within the web portal or from their local machines.

Step 5: Manage and Monitor Organizations and Suborganizations

After your end users begin to use Anchor, you have many options for managing and monitoring the system. Using logs and reports, you can see a range of activities across the entire platform.



The following checklist will help you manage and monitor organizations, suborganizations, and user accounts, and includes links to informational documents and videos in the Anchor Knowledgebase.

- View [activity logs](#), for every account, machine, root, organization, and guest in the system.
- Generate [reports](#) to help you understand storage, space usage, user count, bandwidth usage, and other activities.

QUESTIONS

For specific questions about this eFolder product, please contact us directly:

- Submit all technical issues to [eFolder Support](#)
- Call us at 800-352-0248
- Browse our [Knowledgebase](#)



The People Behind Your Cloud