



GETTING STARTED AS A NEW CLOUDFINDER PARTNER

March 2015

Product Brief

Cloudfinder is a seamless software solution for backing up data that is being stored on the cloud by your clients' software-as-a-service (SaaS) services—such as Office 365, Salesforce, Google Apps and Box. Cloud-to-cloud backup reduces the risk of data loss due to user error, accidental deletion, major data disasters, and hackers. Cloud service providers do not cover data loss due to these kinds of situations.

Ease of Use

Cloudfinder, an eFolder brand, is easy to use. No software needs to be installed on your machine or users' machines.

From one user interface accessed over the Internet, you or your clients' organization administrators can back up, search, restore, manage, and see an overview of all of Cloudfinder's supported software-as-a-service (SaaS) services.

As a Cloudfinder partner, you can create new end-user accounts for your client organizations or businesses. Partners may also create administration logins for administrators to log in and manage the organizational users.

Assistance

We assist our partners in any way. If you have questions after reading these instructions, choose your preferred method of contact.

- Submit questions to cfsupport@efolder.net.
- Browse our [Cloudfinder Knowledgebase by clicking this link](#).
- Watch eFolder's YouTube [instructional video by clicking this link](#).
- Call us at 800-352-0248.

Overview

To become a partner and begin selling Cloudfinder, you'll complete five easy steps. Detailed instructions follow this overview.

Step 1. To use Cloudfinder, first **sign up** to become a Cloudfinder partner. This will give you access to the Cloudfinder application, where you can create and manage your clients' Cloudfinder accounts. Your clients are the companies or organizations that sign up with you to use Cloudfinder to back up their SaaS service(s).

In Step 2, you **create a new client account**.

In Step 3, you **create an administrator for the new client account**. The administrator selects and manages the users that Cloudfinder will back up, performs restores as needed, runs reports, and so forth. More than one administrator can be created.

In Step 4, you **identify the service(s)** that this client will be backing up, such as Office 365 or Salesforce.

In Step 5, the administrator (or you) logs into the Cloudfinder application and **selects individual users** for that client, whose SaaS service(s) will be backed up. The administrator then starts the Cloudfinder backup service. Cloudfinder immediately begins backing up the data.

Have more than one client?

If you have more than one client account, repeat major Steps 2 through 5 in this document for each of your other clients who have signed up with you to use the Cloudfinder service.

We will now look at each of these steps in detail.

Step 1 Sign up to become a partner to gain access to the Cloudfinder application

In this step, you will create a partner account on the Cloudfinder web site.

- a. Visit <http://cloudfinder.com/become-a-partner/> and click **Sign up**. A partner form appears. (Alternatively, you can visit <http://cloudfinder.com/> and select **Partners**, then click **Sign Up**.)
- b. Fill out the form; then click **Submit**. Completing this form gives you access to the Cloudfinder web application, where you can add new client organizations.
- c. **Note:** The email address and password you enter here are now your partner reseller login credentials for logging into Cloudfinder. Store them in a safe place for future retrieval.

Cloudfinder

Check out eFolder's Cloudfinder Partner Program

Fill out the form below to:

- Be contacted by an eFolder sales representative
- Immediately experience the Cloudfinder Partner Portal
- Backup to 25 users in a free Hot For Resale Cloudfinder account

If you for any reason should decide to not become a Cloudfinder partner, you can cancel your Cloudfinder Partner Portal account at any time.

* Indicates required field

Organization name *
Company Name Company size

First Name *
First Name Last Name

Phone *
Phone

Email *
Email

Password *
Password Confirm password

Address *
City Zip
Country

Comments
Comment

As a partner you will be able to offer your customers backup for:

box Office 365 salesforce Google Apps

The list of services Cloudfinder can backup is growing fast. If you see a need for Cloudfinder backup for other services than those we offer today, please register above and send us a comment.

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Cloudfinder's partner program sign-up screen

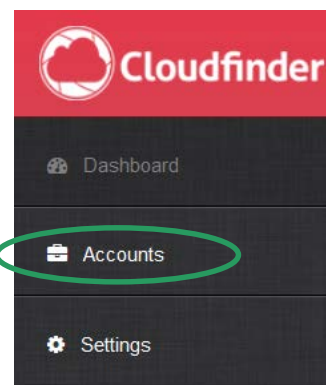
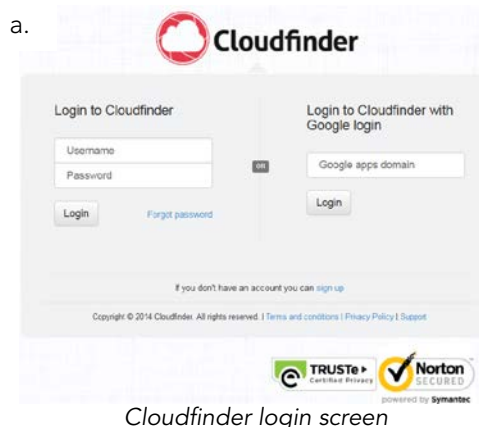
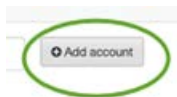
Step 2 Create a new client account

Once you've signed up by submitting the partner account form:

- a. Click **Login** and sign in using the username and password you just created in Step 1.

You can now create a new *client* account for each of your clients who have agreed to use Cloudfinder to back up their SaaS services:

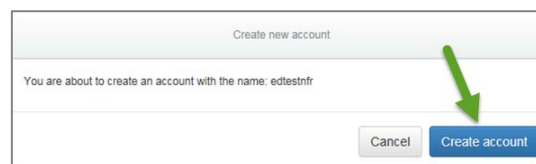
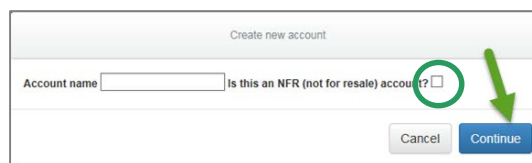
- b. Click on **Accounts** in the left column menu.
- c. Click on **Add Account**.



- d. Create a new account. Enter a name for the client account. If this is your not-for-resale account, check the box *Is this an NFR (not for resale) account*.

Note: As a partner, you can create one NFR (not for resale) account with up to 25 users. Use it for your own company use, for demonstrations, or for some other use. You will not be charged by eFolder for this account and you will not charge others for this account.

- e. Click **Create Account**. You are now able to see the account name.



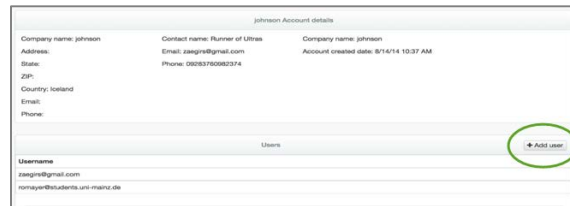
Step 3 Create account administrative users

In this step, you create one or more administrators for the new account. Administrative users can perform a variety of tasks, such as selecting users for backup, running reports, restoring data when necessary, and other tasks. To create a new administrator:

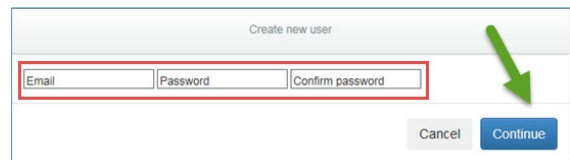
- Click on the account name, then click on the **Add user** button on the right to add an administrative user for the new account.
- Enter the administrator's email and password and confirm the password. **IMPORTANT:** This email must be a different from the email used in the initial partner registration.
- Click **Continue** to create the administrative user account. Store the Cloudfinder administrative users' login credentials in a safe place.

NOTE: If you as the partner created this client account, you will need to provide all login credentials to your client.

- A confirmation notice appears confirming that the administrator account was created. Click **Close** when the confirmation notice appears.
- Now, log out and return to the Cloudfinder home page. Log in as an administrative user using the credentials that were just created. Once you've accepted the terms of agreement, you will be able to proceed.



Cloudfinder account details screen



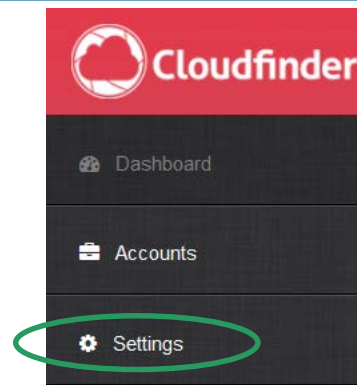
Cloudfinder administrator setup screen



Step 4 Select the cloud applications for back up

In this step, you choose the service(s)—such as Office 365 or Salesforce—that you want to back up for the new client account. Follow these steps:

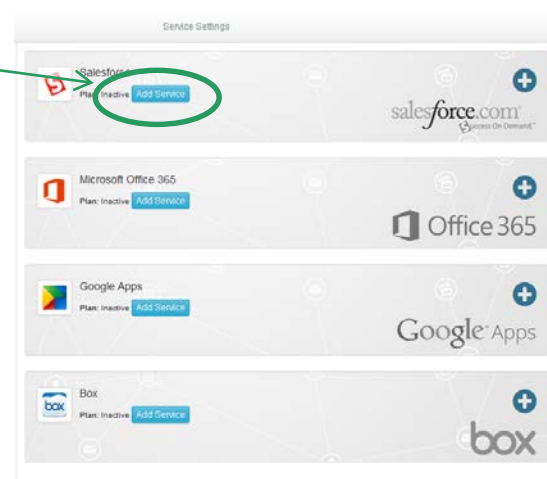
- a. Click on **Settings** in the left column menu.



- b. Click **Add Service** button to select the cloud application(s) you would like to assign to Cloudfinder:

- Office 365
- Google Apps
- Salesforce
- Box

Add Service



- c. After you've selected a service, enter the information requested.

For example, to add Office 365, you will need to enter the *Office 365 Administrator email*, *Password*, and select if you are using *SharePoint*.

When finished, click **Submit**.

See the following special note about Office 365.

 A form titled 'Get Started with Cloudfinder'. It contains the following elements:

- A paragraph of text: "You will need to authorize the Cloudfinder application to access your Office 365 data by filling the form and clicking the Submit button below. Note: Please specify an account with global administrative privileges in your Office 365 organization - backup may be partial otherwise."
- A text input field labeled "Office 365 Admin Email *".
- Two text input fields: "Office 365 Admin Password *" and "Confirm Password *".
- A radio button group labeled "Use SharePoint?" with options "No" and "Yes".
- A small line of text: "By clicking the Create account button, you are agreeing to Cloudfinder's Terms and conditions".
- A "Submit" button.

Example of Office 365 account services dialog box

A Special Note about Office 365

*It is optimal to set up Office 365 **before** setting up Cloudfinder for Office 365. It is important that all permissions have been assigned properly in Office 365 **prior** to setting up Cloudfinder.*

If you are configuring Cloudfinder for the Office 365 cloud application, you must perform the following two additional tasks:

1. Impersonation Rights

The administrator login for Office 365 must have impersonation rights for Cloudfinder to access all of the Office 365 data. To assign these impersonation rights, complete the instructions in the Knowledgebase article entitled *Office 365 Exchange Online Impersonation Setup* at <https://secure.efoldering.com/support/index.php?efolder/Knowledgebase/Article/View/328/50/do-i-need-to-change-any-settings-for-the-backups-to-work>.

2. Add Administrator to List

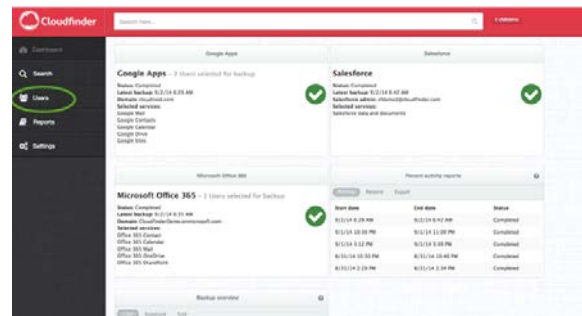
The Cloudfinder account administrator that you created in Step 3 must be added to Site Collection Administrator's list in Office 365. To do this, complete the instructions in the Knowledgebase article entitled *How to Get Started with OneDrive and SharePoint Backups* at <https://secure.efoldering.com/support/index.php?efolder/Knowledgebase/Article/View/357/50/how-to-get-started-with-onedrive-and-sharepoint-backups>.

Step 5 Select the users to be backed up

In this step, you or the client administrator logs in to the Cloudfinder application and selects the users of the client organization whose data is to be backed up.

After you've completed Step 4 ("Select the Cloud Applications for Back Up"), the users' data becomes immediately available for back up. To choose which users' data you want to back up, follow these steps:

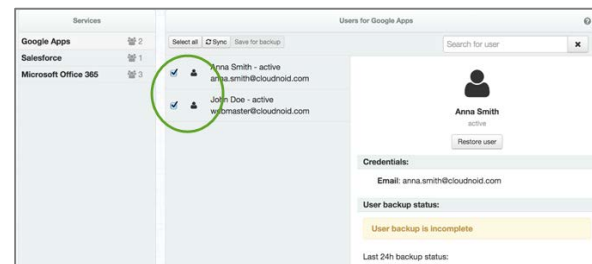
- Go to <https://app.cloudfinder.com/#/login> and log in to Cloudfinder using the *administrator* credentials (email and password) you created in Step 3 ("Create account administrative users").
- Click **Users** in the menu on the left column.



Cloudfinder dashboard screen

- A list of users is displayed. **Check** the box for the user(s) whose data you want backed up to the cloud.
- Click the **Save for backup** button.

Cloudfinder immediately begins backing up the data for the users you selected.



Cloudfinder user details screen



eFolder

The People Behind Your Cloud