Save Money By Combining eFolder Select and eFolder Basic

Save yourself and your customers money. Only eFolder has the unique ability to combine its two different services, eFolder Select and eFolder Basic, in order to give you the most bang for your buck in the remote back-up space.

Following the steps in this "How To" guide will allow your customers to back up static data to an *e*Folder Basic account while backing up data that is changing to an *e*Folder Select account. ***Save time and money by taking advantage of this unique feature that only eFolder offers!***

The setup is simple and requires three steps:

Step 1: *Set up a Basic account for your customer*

(This step assumes you have previously set up an *e*Folder Select account for your customer. You may choose to set up a Basic account first).

Log in to your portal. Click on **Accounts** at the top of the menu, and then select **Create Account**
Choose **Existing Customer** in the first field.
Scroll down, and change the *Parent Account ID* field to **none.**
You may now change the *Service Plan* field to **Basic.**
Give this account a **User Name**. We suggest something like *CustomerUserName.basic.*
Give this account a **Password**. The password may be the same for both the Basic and Select accounts.
Click **Add User** at the bottom.

Step 2: *Create a New profile within the eFolder software client*

Open the backup software client.
Select **File** at the top, then **Switch Profile.**
You will see a list of your profiles. Click on the green "+" symbol on the right. This will create a new profile. Name it **Basic**. Do not switch to this profile yet.
Select **File** at the top, then **Export Profile**. Choose a location to save to.
Select **File** at the top again, choose **Switch Profile**. Choose your newly created Basic profile and switch to it.

Click on **My Account** on the left. Select **File** at the top, and then **Import Profile**. Choose the location you previously saved your profile to. *This step will import your previous profile settings to your new profile. Thus, you will not need to edit this profile's settings to match your old profile (such as re-creating a passphrase, and re-selecting data to back up).*

Now, in the **User Name** field, type the Basic account username (we suggested *CustomerUserName.basic*). Make sure your password is typed in as well.
Click **Test Connection** at the top right. This will verify your connection to our server.
Click **Save** near the bottom right to save the changes in this profile.

Step 3: *Configure each profile to back up desired data set*

Switch back to your Select profile (**File**, **Switch Profile**).

Choose **Folders** on the left. Right click on any folder in the list and choose Edit Policy.

You will see a Policy name at the top (for example: "Default Policy" or "My Folder Policy"). You will also see a numbered list of policy rules underneath.

Highlight the rule (by left clicking with your mouse), which states "Apply all rules in 'Default Policy' policy." Now, click the "Edit Default Policy" button on the right.

You will see a numbered list of rules on the left side with parameters that may be changed on the right side. Now, we are going to add a new wildcard rule. Click on the green "+" and select "wildcard rule." You will see your new wildcard rule added to the bottom of the numbered list.

Change the parameters of this new rule by using the drop down boxes on the right. The rule should state: <u>Exclude</u> <u>Files</u> whose <u>Relative</u> pathname matches the wildcard <u>*.*</u> <u>Older than X days</u> (any file that has not been modified in the last X days will be migrated to the Basic account).

Select save at the bottom. Now, select save again at the bottom. Select the **Options** button on the left. Select the **Versioning** tab at the top. Check the "Destroy Excluded Files" box. Finally, Save your changes at the bottom right.

Remember to repeat the above process for all folders in your folder list. This will ensure that all data can be freely moved from your Select account to your Basic account when it has not been modified in X days.

*Switch to your Basic profile (**File, Switch Profile**).*

Choose **Folders** on the left. Right click on any folder in the list and choose Edit Policy.

You will see a Policy name at the top (for example: "Default Policy" or "My Folder Policy"). You will also see a numbered list of policy rules underneath.

Highlight the rule (by left clicking with your mouse), which states "Apply all rules in 'Default Policy' policy." Now, click the "Edit Default Policy" button on the right.

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Change the parameters of this new rule by using the drop down boxes on the right. The rule should state: <u>Exclude</u> <u>Files</u> whose <u>Relative</u> pathname matches the wildcard <u>*.*</u> <u>Newer than Y days</u> (note that Y should be X minus 5 to give the Basic account 5 days to upload data that is expiring from the Select account).

Select save at the bottom. Now, select save again at the bottom. Select the **Options** button on the left. Select the **Versioning** tab at the top. Check the "Destroy Excluded Files" box. Finally, Save your changes at the bottom right.

Remember to repeat the above process for all folders in your folder list. This will ensure that all data can be freely moved from your Select account to your Basic account when it has not been modified in X days.

<u>Please be sure that your policy rules match exactly the rules described above unless you understand precisely what you are doing. Otherwise unexpected behavior may result. If you have questions about how to configure your backups, please contact us.</u>

You are now ready to run a backup that combines eFolder Select and Basic accounts. Data that has changed will be automatically saved in the *e*Folder Select account. Data that has not changed will be automatically saved in the *e*Folder Basic account.

Remember, each profile may have a different schedule. You may also change other settings--such as passphrase, data set, notifications, etc.

To configure these and other settings, simply switch to the related profile and edit the settings.