# Create an account using the New Account Wizard

To start the New Account Wizard, click the **New** button in the Account Center.

When creating new accounts, there are three possible scenarios. You can create a new account for a new customer, such as when you sign up a new customer for the very first time and create their first account. You can create a new sub-account for an existing customer, such as when an existing customer has new end users that need to back up their machines. And you can create a new parent account for an existing customer, such as adding a parent account for a BDR for a customer who currently only has the Select Backup service. We will walk through the wizard for each of these three scenarios. If you an unfamiliar with any of these concepts, please see related video in this series entitled*, Overview of the Web Portal*.

To create a new account *for a new customer*, start the wizard, select *New account for a new customer* and then select the brand that you want to use for this new customer from the drop-down list, if you have more than one brand. Then click **Next**.

The next page of the New Account Wizard displays account-information fields. Fields with a red border and an asterisk next to the field name are required fields. Hovering over any of the **information** icons displayed next to a field shows helpful information about that field. Enter the company name, contact information, and select the time zone that the customer is in. Then click **Next**.

On the next page of the wizard, select the service plan this new customer account will have. If you need help determining which service plan an account should have, please see the related video in this series entitled, *Choosing a security role and a service plan for an account,* or see the *Partner Provisioning Guide* in the Partner Center. If this is a trial account, enter that number of days for the trial. The default is 30 days but you can specify up to 60 days.

Then create the login credentials for the account. The user name is the login name that the account owner uses to log in to the Web Portal and perform certain tasks in the Backup Manager. It must be unique across all user names in service by eFolder.

Next, create a password by entering one into the *New Password* field or by generating a random password. Check the **Must Change Pwd:** box if you want the password to be a temporary password that the end-user must change when logging in to the Web Portal or Backup Manager for the first time. Note that all passwords are stored in the eFolder system in a salted, strongly hashed form; this ensures that eFolder does not have the ability to disclose the plain-text version of your password to anyone under any circumstance.

Next, enter a description for the account. The first description field is a more public description that the account holder will be able to see, such as “Store inventory computer*.”* The internal description field is a description that the account holder will *not* be able to see, such as “Accounting back office, machine #5.” Some partners use the internal description field to store a cross reference ID when they export raw from the eFolder Web Portal into their other systems.

You can setup a “hard” cloud storage quota for this account, which will halt any backups for this account when the quota is reached, but it is usually better to setup a “soft” quota by setting up an email notification that is triggered when the account exceeds a certain amount of cloud storage. Do this by impersonating the account *after* it is created, selecting *Notifications* from the **My Account** menu option, checking the *Total Disk Usage Notification* field, and entering your soft quota for the account there. In this way, backups will not fail when the account storage limit is reached; rather, an email alert will be sent out at that time and backups will continue as usual.

When specifying cloud storage quotas in these fields, the default unit is megabytes, but you can manually specify another unit; for example, you could enter “10 GB” or “1 TB” and it will recognize those units.

If a user wants to impose their own “hard” quota, they can, as long as it is less than the hard quota specified by the partner for the account. However, users seldom specify their own hard quota.

If you do not want to impose a predetermined storage limit on this account, select *Infinity* in the quota fields.

Check *Notify User via Email* if you want a welcome email to be sent to the account holder’s email address—the one you entered on the previous screen. Temporary passwords will be included in the welcome email, but permanent passwords will not. Therefore, if you do not check this box, or if you did check this box but you did *not* check the *Must Change Pwd:* box, you will have to communicate the account password to the account holder yourself. Partners who are managed service providers typically do *not* check this box because they will be handling the entire setup, configuration, and account management processes for their customers and end-users themselves.

When you are finished, click **Finish** to create the new account. The email address you entered for the account is validated along with some other things, and if everything checks out okay, a message is displayed that lets you know the new account has been created. Because you created a new account for a new customer, a new customer will be created by the system and assigned a customer ID at the same time the new account is created. In fact, creating a new parent account for a new customer is how you create a new customer on the system. Because this is the customer’s first account, it will automatically be made a parent account and have the service plan that you assign. You can verify that the account was created by finding it in the account list the next time you search for it in that list.

Now let’s use the New Account Wizard to create a new *sub-account* for an *existing customer*. After starting the wizard, select *New sub-account for an existing customer*. A list of parent accounts you have permission to see is displayed in the *Select Parent Account* field. If that list is lengthy, only a portion of the list is displayed at a time. You can page through the list using the page navigation controls at the bottom and use the scroll bar to scroll through each page of the list. You can also search for the parent account by entering search criteria in the *Search:* field, or you can enter filter criteria by clicking the **Filter** icon and entering filter information. When you have located the parent account, click on it to select it. Then click **Next**.

On the next page of the wizard, you can either use the same contact information for this sub-account as the parent account by selecting *Use existing customer record* in the *Contact Record field*, or you can create a new contact record for this account by selecting *Create a new contact record.* If you create a new contact record for this sub-account, enter the information for each field as previously described. Either way, click **Next** when you are ready to proceed.

On the next page of the wizard, the parent account ID for the parent account you previously selected is displayed by default in the *Parent Account ID:* field. Enter information into each of the fields on this page as previously described and click **Finish** to create the account.

Now let’s use the New Account Wizard to create a new *parent* account for an *existing customer*. After starting the wizard, select *New parent account for an existing customer*. A list of existing customers that you have permission to see is displayed in the *Select Customer* field. Notice that entries with the same Customer ID number in the first column all belong to the same customer. To choose an existing customer, select any account that is associated with the desired customer. Use the search box, the scroll bar, and the page controls at the bottom to locate the customer for whom you want to create the new parent account. Click the customer to select it. Then, click **Next**.

The next two pages of the wizard are identical to those we have already seen. Enter the information and make your selections on those two pages and click **Finish** on the third page to create the new account.

This completes our overview of how to create a new account using the New Account Wizard.