# Welcome and Overview of the Partner Center

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**Introduction**

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Welcome to eFolder! We’re glad to have you as our partner. Onboarding with a new vendor can be a complex process, but our goal is to make the onboarding process as smooth as possible. Your eFolder account manager is your advocate and will work closely with you to form a successful partnership. Please reach out to him or her anytime you need assistance or guidance.

This video provides a brief overview of the resources that are available in the Partner Center to help you quickly become profitable in selling and managing your rebranded eFolder services and accounts.

This is the first of a series of short instructional videos that will lead you through the basic concepts and procedures you need to know as a new partner. You can find these training videos in the Learning Center of the eFolder Web Portal. The *Web Portal* is a web site that has been specially designed for eFolder partners to view, monitor, and manage their customers and end-user accounts, generate reports, access partner program information, and receive training and support. The *Partner Center* is a page within the Web Portal that contains information, pricing, training videos, user guides, and marketing resources for eFolder partners.

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**Opening the Web Portal**

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To open the Web Portal, go to [www.efolder.net](http://www.efolder.net), or go to your branded Web Portal that was created for you when you became an eFolder partner, or go to the generically branded web portal at <https://backup.securewebportal.net>. Then click the **Login** button at the top of the page, enter the login credentials that you were given when you became an eFolder partner, and click **Login**. The Home Page of the Web Portal is displayed.

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**Overview of the Partner Center**

Now select the *Partner Center* option in the **Support** drop-down menu of the Web Portal to display the Partner Center, which contains links to resources specifically geared to partners, such as training, documentation, marketing literature, and pricing information.

Let’s take a brief tour of the Partner Center. The quickest way to find content relating to a particular topic is to use the search bar at the top of the page. This will perform a full text search inside all of the documents that are available in the Partner Center and display them in order of relevance to your search term. This will allow you to quickly find training, pricing, documentation, or other information for a given topic in just a few seconds.

Click the *Learning Center* link within the Partner Center to display the Learning Center resources. The heart of the Learning Center is eFolder University, which includes a series of instructional videos specifically designed for new partners. As a new partner, you should watch *each* of the videos in the Basic Training for Partners section in the order in which they are listed. Together, these videos comprise your new partner training and will teach you the fundamental concepts and procedures you need to know.

*After* you have viewed the videos in the Basic Training for Partners section, feel free to watch the other training videos when you need to know more about a specific topic or task. For example, the How-to Video Snippets section contains short demonstrations of how to perform specific tasks, such as resetting a password for an account or changing the service plan assigned to an account.

The Additional Resources section contains in-depth instructional videos on specific tasks, such as how to use the BDR Cost Wizard, or how to configure the Backup Manager and the Web Portal to monitor the status of AppAssure BDRs, or how to setup and configure ShadowProtect BDRs.

The Recordings of Live Training Sessions section contains video recordings of live training sessions that were given previously to partners on specific topics.

To close a major section in the Partner Center that you have expanded, simply click on the name of the section. Clicking the name toggles the display of the detailed contents of that section on and off.

In addition to the Learning Center training offerings, the Partner Center also contains other resources that you will find useful.

For example, the Partner Program Resources section of the Partner Center contains information about eFolder partner programs, including the services you can offer, order forms, worksheets, pricing information, and pricing calculators and wizards.

One important link in this section is the *eFolder Price List*. Clicking this link downloads the confidential eFolder price list spreadsheet, which displays the costs you will be charged for each of the eFolder services your customers are using. As a partner, you can charge your customers whatever you like for your rebranded eFolder services. Click any of the eFolder services listed at the top of this spreadsheet to display the detailed pricing information for that service in the area below.

The BDR cost wizards are useful if you plan to sell Backup and Disaster Recovery appliances and services. Videos explaining how to use these wizards can be found in the Learning Center section of the Partner Center.

The Partner Documentation Center of the Partner Center contains getting started guides, articles on best practices, how-to documents, and reference material on various topics, including billing and integrating your Web Portal with a Professional Services Automation (or PSA) program.

The Partner Literature section of the Partner Center contains marketing literature that you can use, adapt, or rebrand to attract new eFolder partners. These resources are grouped by the specific eFolder service to which they apply. At the bottom of this list are fact sheets for partners for each of eFolder’s available services.

The End User section of the Partner Center contains marketing literature you can rebrand and use to sell your services to prospective customers and end-users. This includes fact sheets on eFolder data centers, various eFolder services, sample marketing letters, whitepapers on various topics, product diagrams, and other visual aids.

All of the resources in the Partner Center are designed to help you quickly become successful and profitable in selling eFolder services.

Finally, please note that when your customers and end-users login to the Web Portal, they will not have the *Partner Center* as an option under the **Support** menu. This prevents customers and end-users, for example, from accessing sensitive information, such as what you are paying for the services you are providing, and other information that is intended only for partners. Only accounts that are assigned a security role relating to channel partners have access to the Partner Center. Security roles are defined and explained in the *Basic Training for Partners* videos in the Learning Center.

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**Brands, Accounts, Customers, and End-Users**

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To jumpstart your learning, let’s briefly discuss a few basic eFolder concepts. As a partner, you will remarket eFolder services under your own brand, as eFolder does not sell directly to end-users. A *brand* is the marketing logo and name that you have chosen to use when reselling eFolder services. For example, the Data Protection brand name and logo used in this training video represent a brand. When you became an eFolder partner, you were asked to submit your own branding information. The eFolder team used this information to create your own branded Web Portal with your own logo and brand name. The eFolder team also created a new *partner* account for you in the Web Portal and gave you your partner account login credentials so that you can login to the Web Portal, create and manage new end-user accounts, and access training and support.

Most partners market all of their eFolder services under one brand. However, a few partners sell eFolder services to two or more vertical markets, such as medical practices, law firms, and financial markets. These partners use a different brand for each vertical market. If this is something you want to do, please contact your Account Manager to submit a request. Most of the information that you can display in the Web Portal is grouped by brand to make it easy for you to manage and bill customers within each brand. Again, most partners only have a single brand, so multiple brands may not apply to you.

An *account* represents a billable eFolder *service* that is being used by an end-user, such as file backup, email archiving, email security, or backup and disaster recovery (BDR) appliance. For backup related services, an account is associated with a *single* machine that is using an eFolder service. However, a single machine may have more than one account assigned to it if that machine is using more than one eFolder service, such as the *Basic* *and* *Select* Backup for Files services. In other words, a backup account can be assigned to only one machine, but a single machine can have multiple accounts if it is using multiple eFolder services.

In the training videos in this series, we will refer to customers and end-users. *Customers* are businesses, organizations, or companies, such as Bob’s Auto Body Repair or Middleson and Kroft Attorneys at Law, who have signed up to use one or more eFolder services. *End-users* are the people within those businesses who have a machine that is using an eFolder service. Bob’s Auto Body Repair shop, for example, is a customer who might have 10 end-users, each of whom has a computer that is being backed up by an eFolder service.

With rare exception, every eFolder account is assigned to a customer, such as Bob’s Auto Body Repair. Every time you create a new account, you indicate if the account is for a new customer or if the account is for an existing customer, meaning one you have already created in the Web Portal. If this is the first account that will be assigned to a new customer, you will indicate that the account is for a new customer. A new customer is created at the same time that the first account for that customer is created. As part of the process of creating the new account, you will be prompted to enter the new customer’s name and information—typically, the name of the business or organization, such as Bob’s Auto Body Repair.

After you have created the new customer, such as Bob’s Auto Body Repair, in the Web Portal in this manner, all subsequent end-user accounts that you create that are associated with that customer should be assigned to that customer—in this case, Bob’s Auto Body Repair—when the account is created. In short, when you have a new customer, you create that new customer in the system at the same time as when you create the first end-user account for that customer. That is how you establish a new customer in the system. After that, when you create new end-user accounts for that customer, you indicate that the accounts are for an existing customer, and you choose that customer from a drop-down list on the account creation page.

Each account is also assigned a single eFolder service plan at the time it is created, such as the *Select Backup for Files* service plan. Here’s how it works. When you are ready to sign up a new end-user for an eFolder service, you must create a new account for that customer in the Web Portal, assign the account to a new or existing customer, and assign the desired eFolder service plan to the account. You will also create a new user ID and password for this account when it is created. All of this is a necessary before an end-user can use an eFolder service because eFolder tracks the use of its services through the partner’s accounts as managed in the Web Portal.

If this is all new to you, do not worry. We will revisit each of these concepts in turn in the subsequent training videos in this series.

Thank you for becoming an eFolder partner. We look forward to a mutually beneficial partnership for years to come.

This concludes the introduction. Please continue with the next video in this series entitled, *Overview of eFolder Backup for Files*, which you can find in the Learning Center section of the Partner Center.