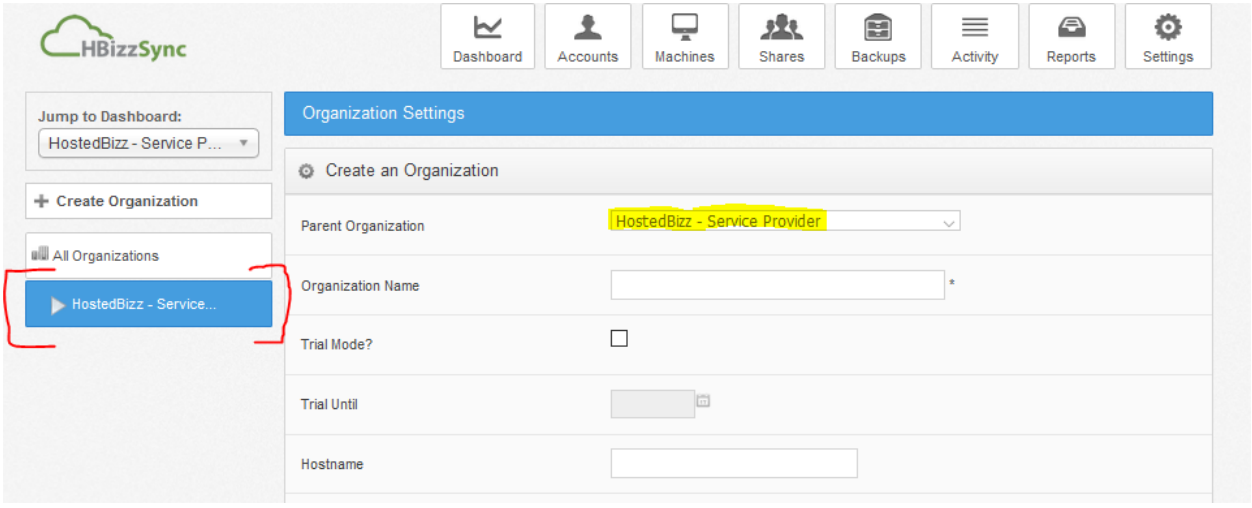
Setting up a new Customer in HBSync Portal: (https://sync.vmcloud.ca)

Step 1:

Select “Create Organization” from the top left of the screen:

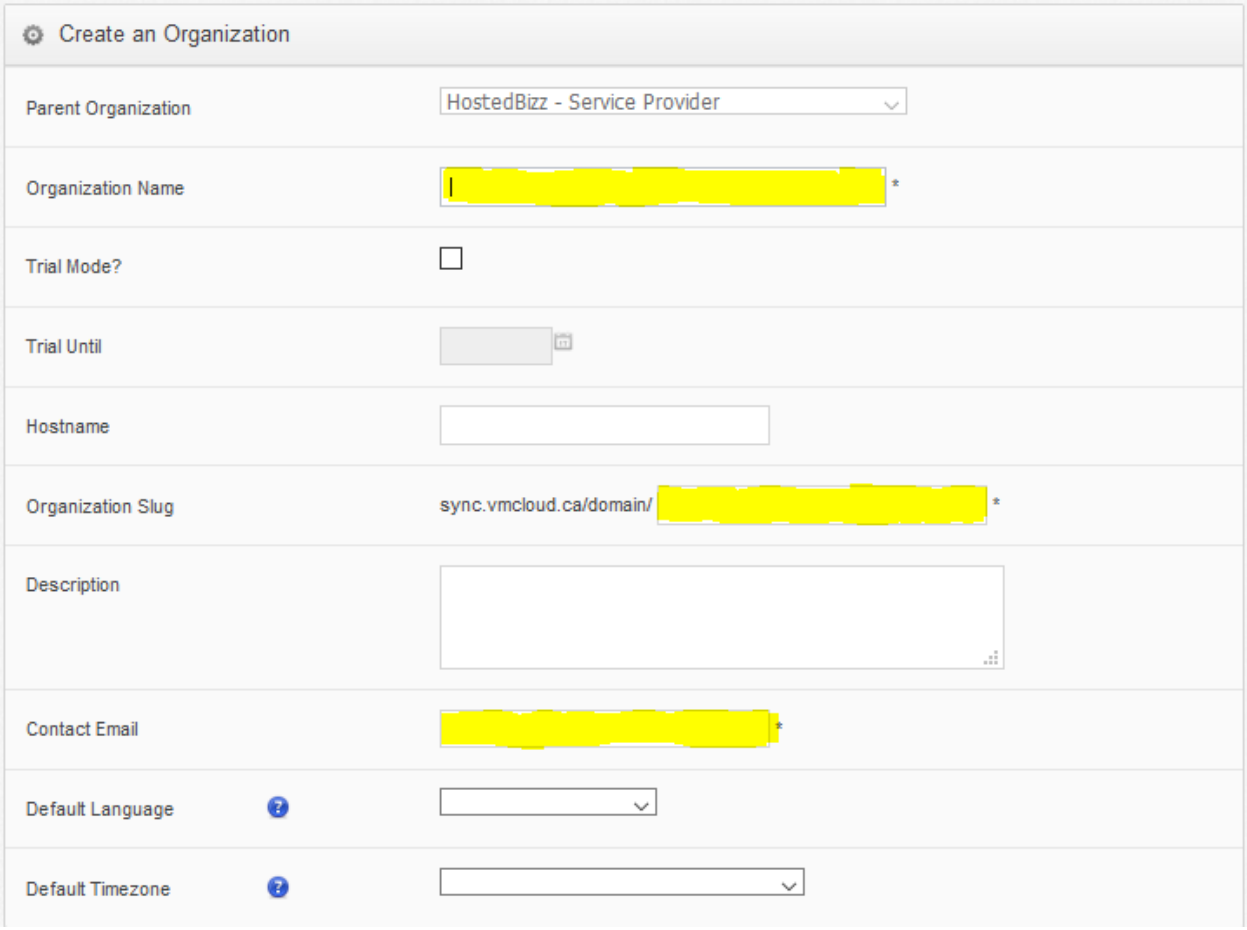
Step 2:

Ensure you have selected your reseller company to corre4ctly populate “Parent Organization” field:



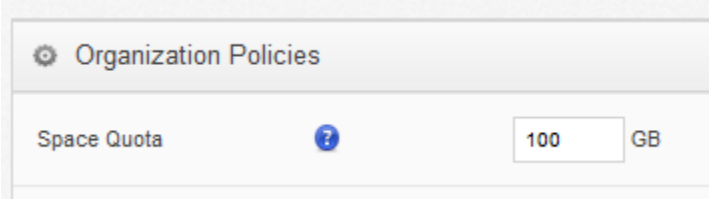
Step 3:

Fill out all of the required fields in the Organization window; any other data you wish to populate:



Step 4:

Fill out all any other optional parameters including but not limited to retention & purge policies, user setting defaults, etc.



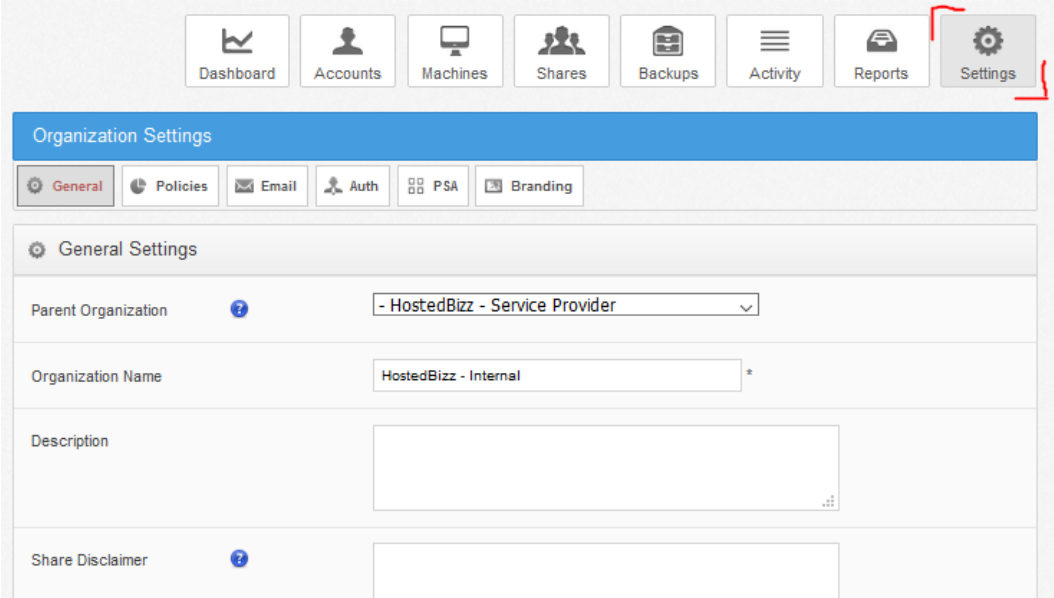
NOTE: Space quote is billed as quota and NOT space actually used. Try to right-size quote based on client needs

Step 5:

Once the desired attributes have been specified, hit save at the bottom.

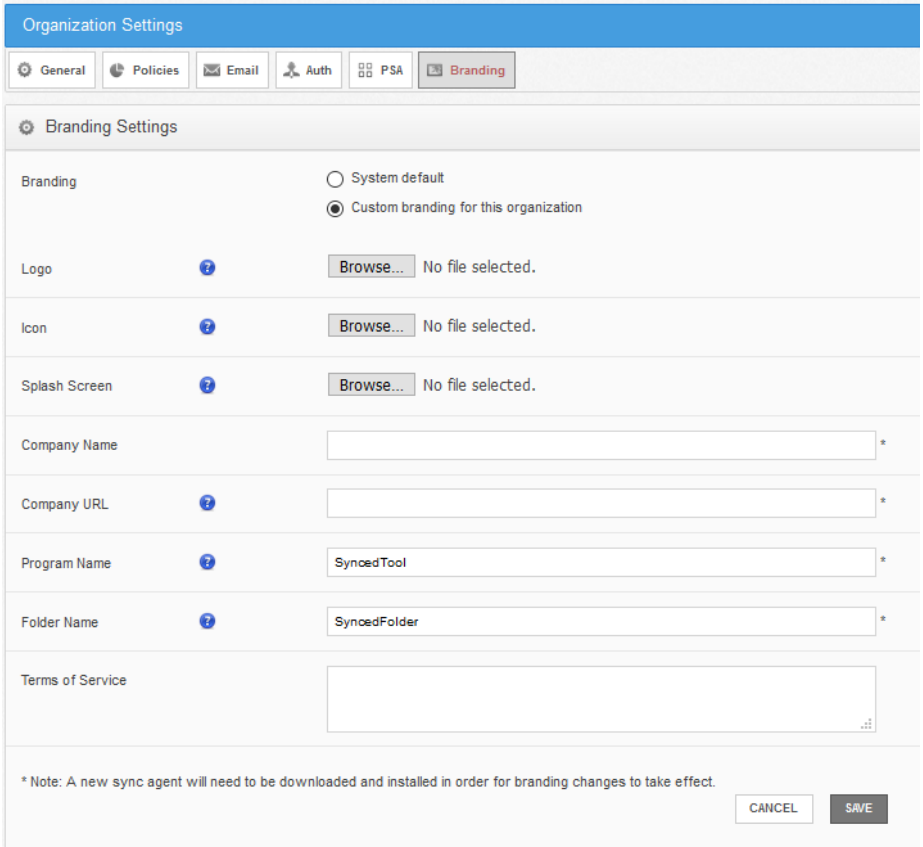
Step 6:

You can edit attributes by selecting the Settings button:



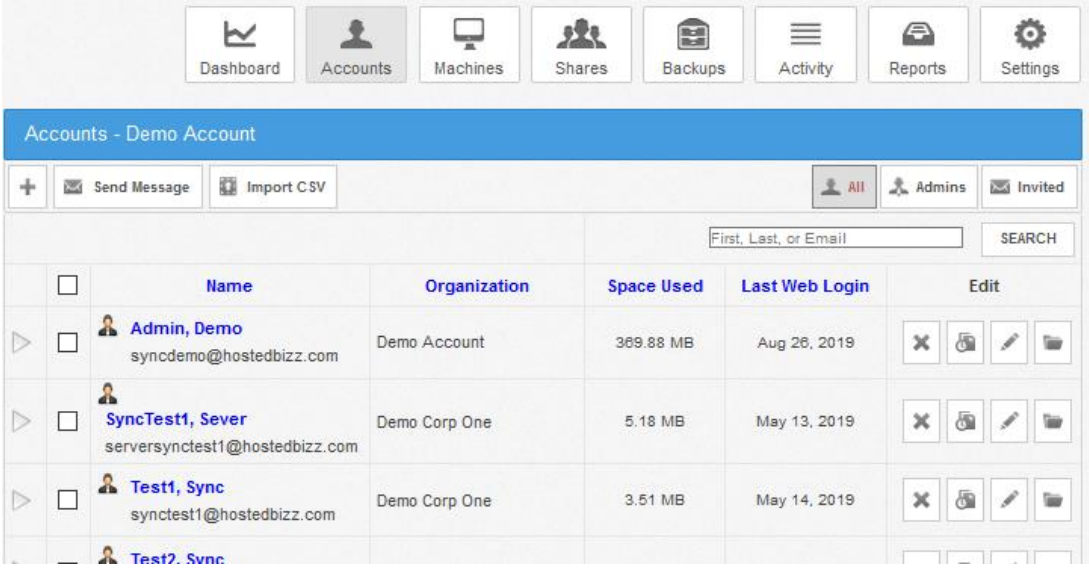
Step 7:

If your client wishes to use a branded version of the client, this can be done in the Branding tab:



Step 8:

Select the Accounts tab to add users. Users can be Admins or regular users; as well temporary guest accounts can be created:



NOTE: permissions can be assigned to individual users or to groups of users:

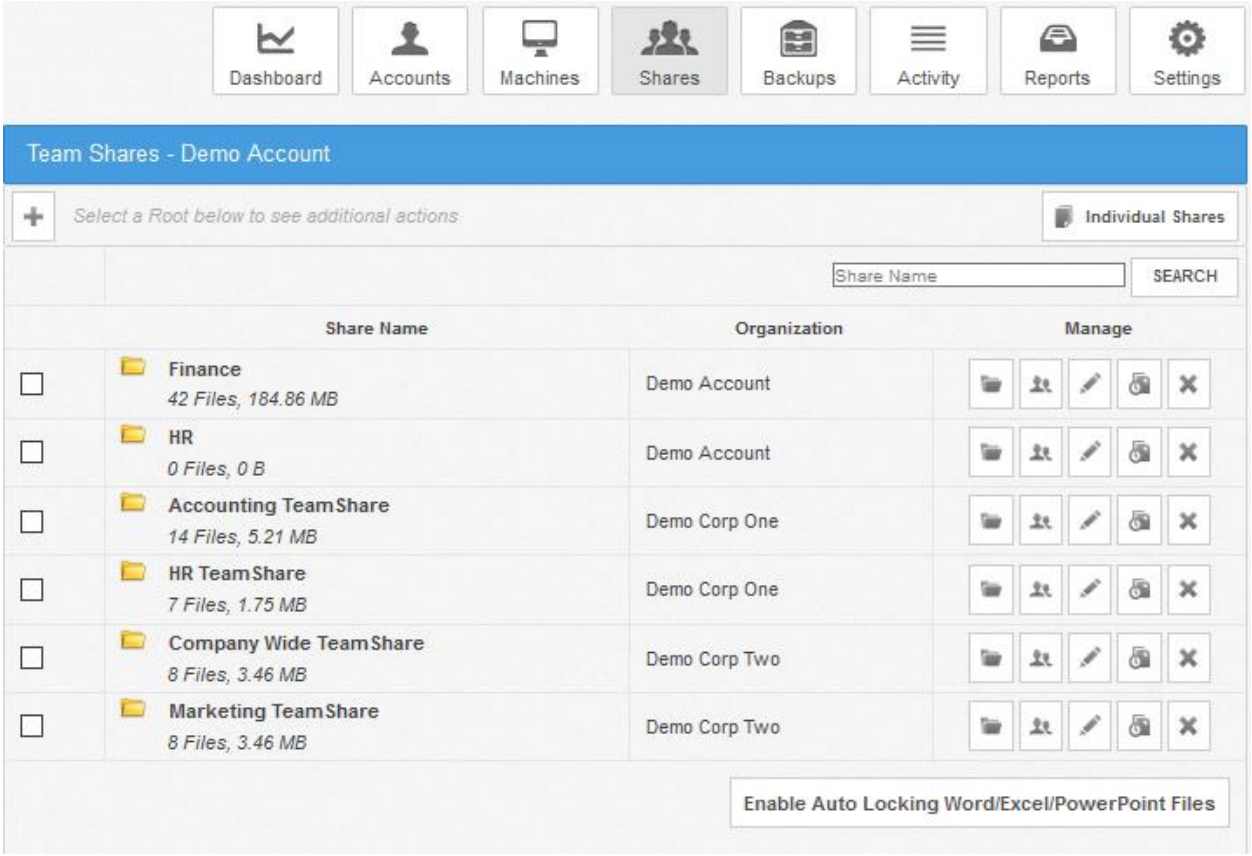
Permission Roles

ROLE	ITEM (FOLDER & FILE)						FILE				WEB EDIT	FOLDER		
	OWNER	TRIM	PURGE	DELETE	SHARE	SYNC	VIEW	PRINT	READ	WRITE		LIST	CREATE	DELETE
Co-Owner	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Collaborator	✗	✗	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Editor	✗	✗	✗	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓
Web Editor	✗	✗	✗	✓	✗	✗	✓	✗	✗	✗	✓	✓	✓	✓
Viewer	✗	✗	✗	✗	✗	✓	✓	✓	✓	✗	✗	✓	✗	✗
Previewer	✗	✗	✗	✗	✗	✗	✓	✗	✗	✗	✗	✓	✗	✗
Uploader	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✗

Permission	Item	Description
item-owner	file or folder	Can change the permissions of the file or folder
item-trim	file or folder	Can trim revisions of the file or folder
item-purge	file or folder	Can purge the file or folder
item-delete	file or folder	Can delete the file or folder
item-share	file or folder	Can create a share link to the file or folder
item-sync	file or folder	Can download and sync the file or folder and contents to devices
file-view	file only	Can preview file contents (cannot download or print)
file-print	file only	File-view, can print
file-read	file only	File-print, can download and sync file contents to devices
file-write	file only	File-read, can modify file contents
file-webedit	file only	Can modify file contents on the web only
folder-list	folder only	Can list the contents of a folder or file within this folder
folder-create	folder only	Can create a folder or file within this folder
folder-delete	folder only	Can delete a folder or file within this folder

Step 9:

Select the Shares tab to create shared folders. Shares can be delegated to users and groups at varying levels of control. Users will be able to sync entire shares or folders within each share tree:



NOTE: it is recommended to design hierarchy to include more small shares over fewer larger shares. This allows users to sync only files they need and use rather than large archives of data.