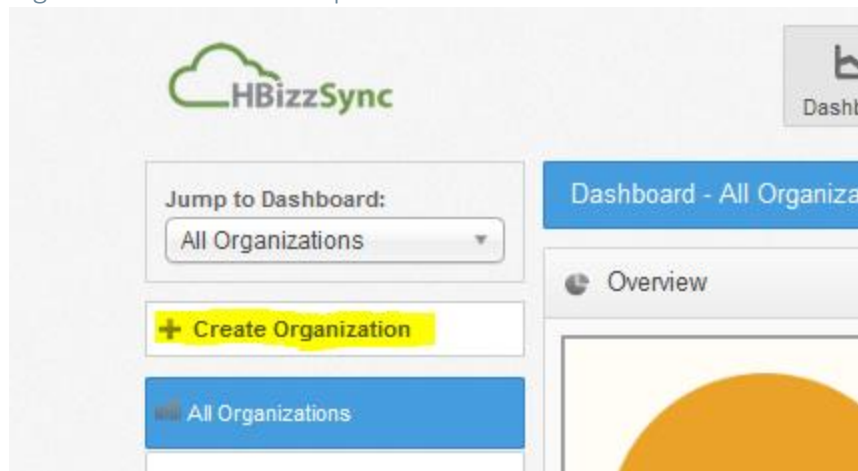


Setting up a new Customer in HBSync Portal: (<https://sync.vmcloud.ca>)

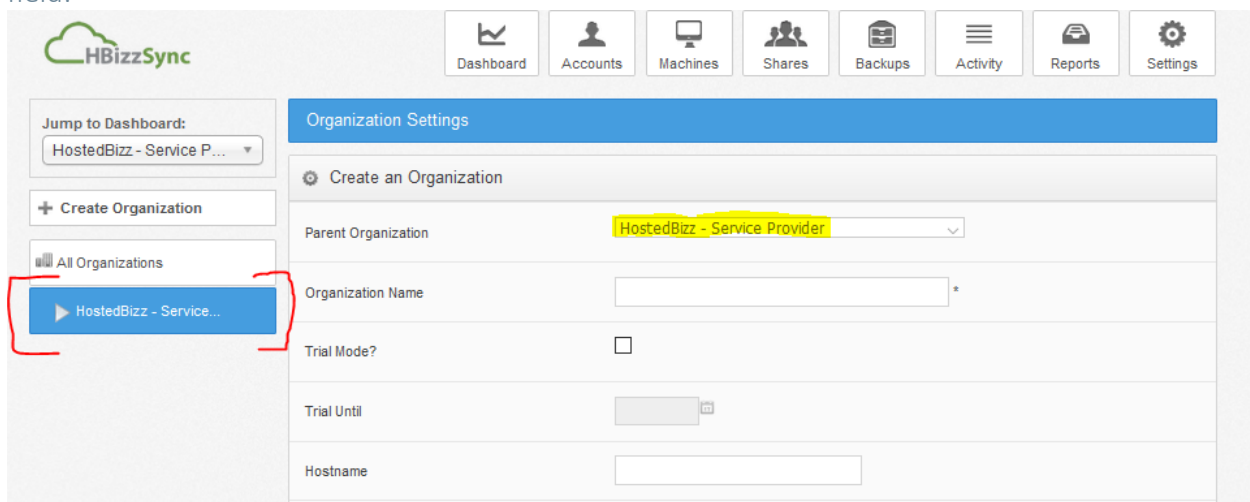
Step 1:

Select "Create Organization" from the top left of the screen:



Step 2:

Ensure you have selected your reseller company to correctly populate "Parent Organization" field:



Step 3:

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

Create an Organization	
Parent Organization	HostedBizz - Service Provider
Organization Name	[REDACTED] *
Trial Mode?	<input type="checkbox"/>
Trial Until	<input type="text"/>
Hostname	<input type="text"/>
Organization Slug	sync.vmccloud.ca/domain/[REDACTED] *
Description	<input type="text"/>
Contact Email	[REDACTED] *
Default Language	<input type="text"/>
Default Timezone	<input type="text"/>

Step 4:

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

Organization Policies	
Space Quota	<input type="text" value="100"/> GB

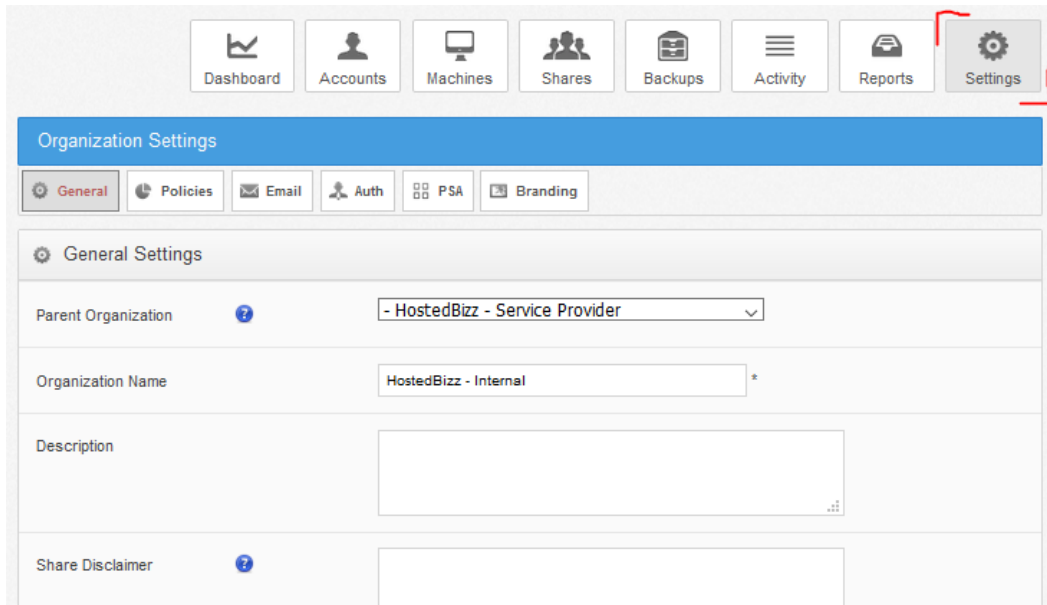
NOTE: Space quote is billed as quota and NOT space actually used. Try to right-size quote based on client needs

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:

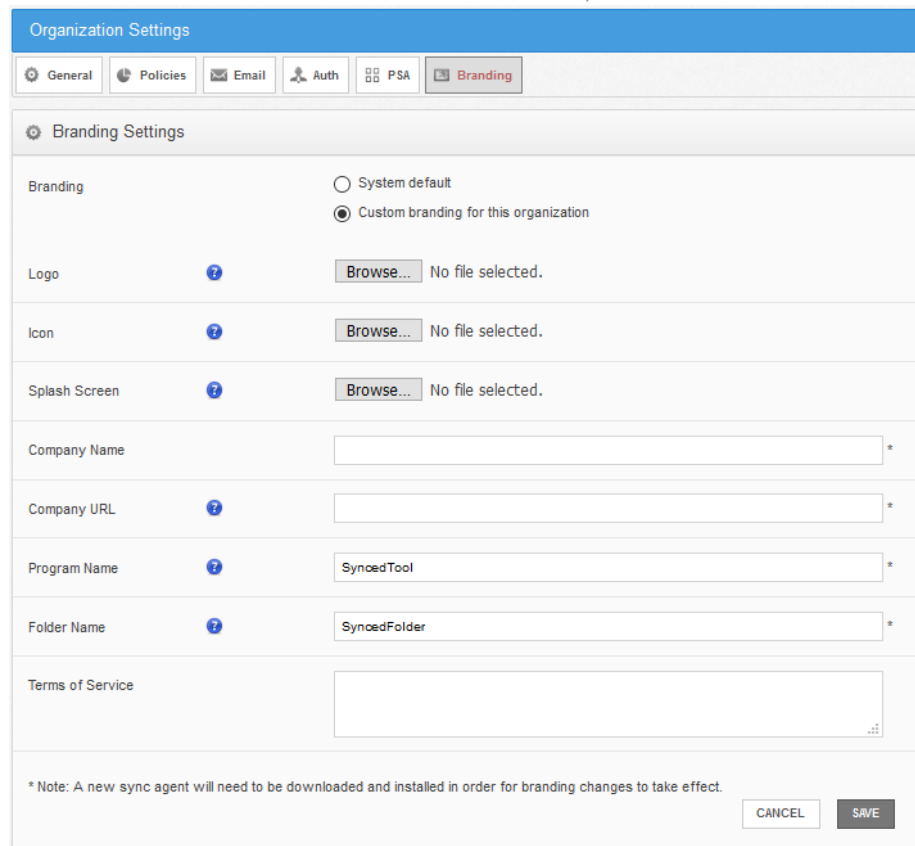


The screenshot shows the 'Organization Settings' page with the 'General' tab selected. The top navigation bar includes buttons for Dashboard, Accounts, Machines, Shares, Backups, Activity, Reports, and Settings (highlighted with a red bracket). The 'General Settings' section contains the following fields:

- Parent Organization: - HostedBizz - Service Provider (dropdown)
- Organization Name: HostedBizz - Internal (text input, required)
- Description: (text area)
- Share Disclaimer: (text input, required)

Step 7:

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



The screenshot shows the 'Organization Settings' page with the 'Branding' tab selected. The 'Branding Settings' section contains the following fields:

- Branding: ☐ System default, ☒ Custom branding for this organization
- Logo: Browse... No file selected.
- Icon: Browse... No file selected.
- Splash Screen: Browse... No file selected.
- Company Name: (text input, required)
- Company URL: (text input, required)
- Program Name: SyncoedTool (text input, required)
- Folder Name: SyncoedFolder (text input, required)
- Terms of Service: (text area)

* Note: A new sync agent will need to be downloaded and installed in order for branding changes to take effect.

CANCEL SAVE

Step 8:

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

The screenshot shows the 'Accounts - Demo Account' interface. At the top, there's a navigation bar with icons for Dashboard, Accounts (selected), Machines, Shares, Backups, Activity, Reports, and Settings. Below the navigation bar, there's a header for 'Accounts - Demo Account' with buttons for '+', 'Send Message', and 'Import CSV'. To the right of these buttons are filters for 'All', 'Admins', and 'Invited'. Below the filters is a search bar labeled 'First, Last, or Email' with a 'SEARCH' button. The main content area is a table with the following columns: Name, Organization, Space Used, Last Web Login, and Edit. The table contains four rows of user data:

	Name	Organization	Space Used	Last Web Login	Edit
<input type="checkbox"/>	Admin, Demo syncdemo@hostedbizz.com	Demo Account	369.88 MB	Aug 26, 2019	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	SyncTest1, Sever serversynctest1@hostedbizz.com	Demo Corp One	5.18 MB	May 13, 2019	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Test1, Sync syncntest1@hostedbizz.com	Demo Corp One	3.51 MB	May 14, 2019	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Test2, Sync				<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

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:

Dashboard

Accounts

Machines

Shares

Backups

Activity

Reports

Settings

Team Shares - Demo Account

Select a Root below to see additional actions

Individual Shares

Share Name

SEARCH

	Share Name	Organization	Manage
<input type="checkbox"/>	<div>Finance</div> <div>42 Files, 184.86 MB</div>	Demo Account	<div></div> <div></div> <div></div> <div></div> <div></div>
<input type="checkbox"/>	<div>HR</div> <div>0 Files, 0 B</div>	Demo Account	<div></div> <div></div> <div></div> <div></div> <div></div>
<input type="checkbox"/>	<div>Accounting TeamShare</div> <div>14 Files, 5.21 MB</div>	Demo Corp One	<div></div> <div></div> <div></div> <div></div> <div></div>
<input type="checkbox"/>	<div>HR TeamShare</div> <div>7 Files, 1.75 MB</div>	Demo Corp One	<div></div> <div></div> <div></div> <div></div> <div></div>
<input type="checkbox"/>	<div>Company Wide TeamShare</div> <div>8 Files, 3.46 MB</div>	Demo Corp Two	<div></div> <div></div> <div></div> <div></div> <div></div>
<input type="checkbox"/>	<div>Marketing TeamShare</div> <div>8 Files, 3.46 MB</div>	Demo Corp Two	<div></div> <div></div> <div></div> <div></div> <div></div>

Enable Auto Locking Word/Excel/PowerPoint Files

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.