



GFI Partners[™] Area

PARTNERS GUIDE

Find out how to navigate and benefit from all the features that the GFI Partners Portal offers to GFI partners.



The information and content in this document is provided for informational purposes only and is provided "as is" with no warranties of any kind, either express or implied, including without limitation any warranties of merchantability, fitness for a particular purpose, and non-infringement. GFI Software disclaims and in no event shall be liable for any losses or damages of any kind, including any consequential or incidental damages in connection with the furnishing, performance or use of this document. The information is obtained from publicly available sources. Though reasonable effort has been made to ensure the accuracy of the data provided, GFI makes no warranty, promise or guarantee about the completeness, accuracy, recency or adequacy of information contained in this document and is not responsible for misprints, out-of-date information, or errors. GFI reserves the right to revise or update its products, software or documentation without notice. You must take full responsibility for your use and application of any GFI product or service. No part of this documentation may be reproduced in any form by any means without prior written authorization of GFI Software.

If you believe there are any factual errors in this document, please contact us and we will review your concerns as soon as practical.

GFI and GFI Partners Portal are trademarks or registered trademarks of GFI Software or its affiliates in the US and other countries. Any other trademarks contained herein are the property of their respective owners.

GFI Partners Portal is copyright of GFI Software Ltd. - 1999-2018 GFI Software Ltd. All rights reserved.

Document Version: 1.0.0

Last updated (month/day/year): 04/09/2018

Contents

1 Introduction	5
1.1 About	5
1.2 How to join the GFI Partners Program	5
1.3 Using this help	6
1.3.1 We value your feedback!	6
2 Getting Started	7
2.1 Logging in	7
2.2 Editing your company information	8
2.3 Resetting a password	11
2.4 Adding users	12
2.5 Login credentials	13
3 Managing your customers accounts	15
3.1 Accessing the Accounts portal	15
3.2 Creating a new account	16
3.3 Managing users	18
3.4 Managing licenses	19
3.5 Updating account details	21
3.6 Getting a quote	22
3.7 Purchasing a new product	23
3.7.1 Reseller	24
3.7.2 Distributor	25
3.7.3 Purchase via Direct Contact	26
3.8 Renewing a license or subscription	27
3.9 Upgrading a license key	28
3.10 GFI Unlimited	30
3.10.1 Managing a GFI Unlimited Subscription	30
3.10.2 Activating a GFI product on behalf of your customer	31
3.10.3 Updating existing licenses to a GFI Unlimited license	33
3.11 GFI Prime	35
3.12 Locating an account	36
4 Training Portal	37
4.1 Logging to the Training Portal	37
4.2 Starting a course	38
4.3 Taking an exam	39
5 Resource Center	41
5.1 Co-branding	41
5.2 Accessing Resources	42
5.2.1 Using printed material	43
5.2.2 Using PowerPoint presentations	43
5.2.3 Using online material for website branding	43
5.2.4 Downloading resources	43
5.3 Price books	46
5.4 Deal Registration	46
5.5 Partner Linking	47
5.6 Download Express	48
5.7 Webinars	49

5.8 Feedback and Feature Requests	50
5.9 Insider Program	52
6 Support	54
6.1 Opening a support case	54
6.2 Managing open support cases	56
6.3 Starting a chat session with a support representative	58
7 Other resources	61

1 Introduction

1.1 About

Use this guide to find out how to navigate and benefit from all the features that the GFI Partners Portal offers to Partners.

As a registered member, you can access the GFI Partners Portal which provides you with detailed information about your clients. The GFI Partners Portal also offers access to resources that facilitate your work such as sales and marketing assistance, training and co-branding.

See also:

- » [GFI Partners Program Overview](#)
- » [Learn more about GFI Prime](#)

1.2 How to join the GFI Partners Program

The GFI Partner Program offers competitive solutions, profitable pricing and comprehensive support packages to help you grow a successful business. Joining the program is free. There are no fees, purchase requirements or pressure to do anything except check out the program and see if it fits your needs.

Benefits of becoming a partner:

- » Earn high margins and build a recurring revenue stream, selling award-winning solutions.
- » Benefit from a dedicated channel manager, a qualified lead program, competitive pricing, exclusive promotions, and targeted marketing campaigns.
- » Access an extensive menu of technical and training resources available online and on-site.
- » Access the latest marketing collateral, expert product videos, and on-demand webinars.
- » Evaluate, demonstrate and implement GFI solutions and add-ons with fully loaded Not For Resale (NFR) licenses.
- » Attend sponsored events and exclusive partner-only forums to increase your knowledge, interact with respected product specialists and network with your peers.

Steps to becoming a partner

To become a partner:

1. On your favorite browser navigate to <https://www.gfi.com/app/newpartner>
2. Fill out the **Become a GFI Partner** application and click **Submit**.

Your request to join the GFI Partners Program will be reviewed for approval within twenty-four hours. Once your request is approved, you receive an email with your GFI Partners Portal login credentials together with some other useful information.

Partnership levels

The GFI Partner Program has three levels:

Level	Description
Bronze Partner	For new partners. Providing everything you need to get started as an IT reseller or Cloud service provider including tools, training and community access.
Silver Partner	For established partners, this level provides access to additional sales and marketing support to help you grow.
Gold Partner	For top tier partners who achieve and maintain exemplary performance. This level offers the greatest number of program benefits and support.

1.3 Using this help

To make reading easier and more informative, we used a variety of visual cues to indicate how to navigate the help. We also used visual cues to highlight important information. This section describes those cues and how you can use them.

Intended audience

This guide benefits current GFI Partners and people considering applying for a GFI partnership. Some of the topics and concepts covered assume a rudimentary understanding of common business practices. It is especially written for people who have commercial ties to GFI Software Ltd or those who desire to develop them.

Terms and conventions used in this guide

Term	Description
Note	Additional information and references essential for the operation of GFI Partners Portal.
Important	Important notifications and cautions regarding potential issues that are commonly encountered.
>	Step by step navigational instructions to access a specific function.
Bold text	Items to select such as nodes, menu options or command buttons.
<i>Italics text</i>	Parameters and values that you must replace with the appropriate value, such as custom paths and file names.
Code	Indicates text values to key in, such as commands and addresses.

1.3.1 We value your feedback

If you have not found what you are looking for or if you have any comments, do not hesitate to get in touch with us. All comments are valued and inquiries are treated with the strictest confidence.

Send us an email at documentation@gfi.com

2 Getting Started

Login to the GFI Partners Portal to start exploring its features. In this section, learn how to edit the details of your account, add new users and change login details.

Topics in this section:

2.1 Logging in	7
2.2 Editing your company information	8
2.3 Resetting a password	11
2.4 Adding users	12
2.5 Login credentials	13

2.1 Logging in

GFI Partners can log in to the GFI Partners Portal to manage their account and perform operations such as upgrading license keys, renewing licenses or buying new products.

GFI Partners can have access to three different portals:

Portal	Description
GFI Partners Area	Main platform for Partners access.
GFI Customer Area	Platform to manage company information
GFI Accounts Portal	Platform to manage users and licenses

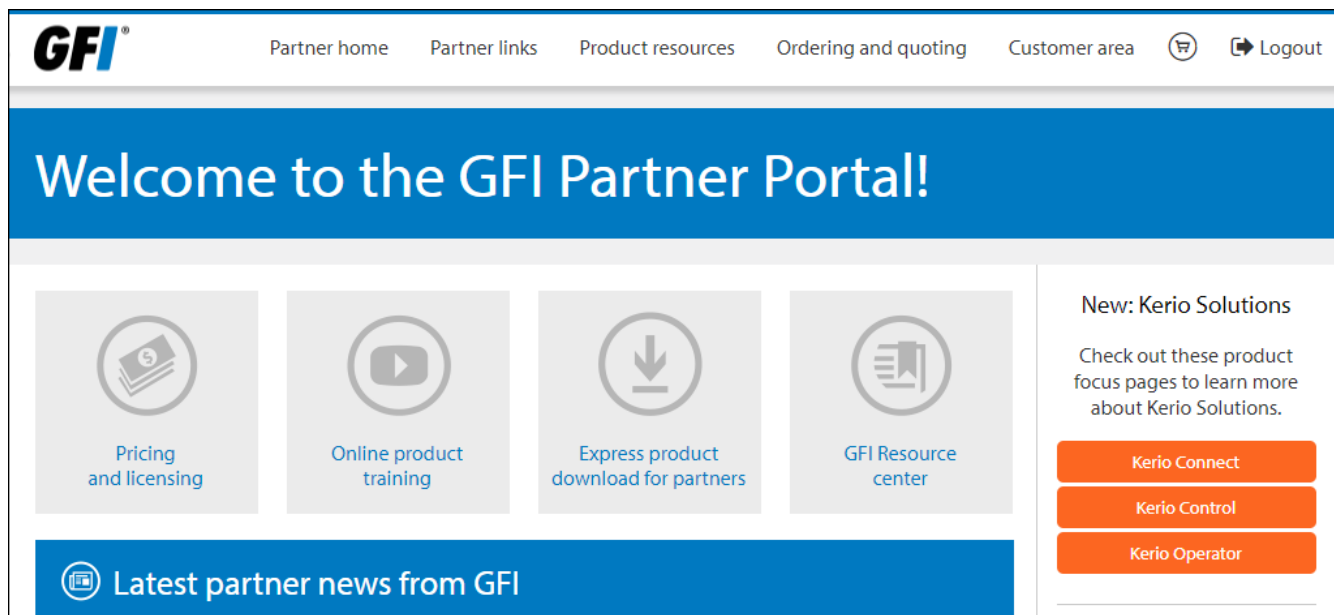
GFI Partners can log in into the GFI Partners Portal to manage their account and perform operations such as upgrading license keys, renewing licenses or buying new products.

The username is the email address that you used to register for your partnership with GFI Software Ltd.

If you receive an invalid username or password message you can [reset your password](#).

To login to the GFI Partners Portal:

1. On your favorite browser navigate to <https://partners.gfi.com>
2. Type your partner credentials and click **Login**.



Screenshot 1: GFI Partners Portal interface

From the GFI Partners Portal you can:

- » [Access online training for GFI products](#)
- » [Access the Resource Center](#)
- » [Download the product installers](#)
- » [Manage your clients](#)

2.2 Editing your company information

The contact information of your company on the GFI Customer Area can be used to build your co-branded marketing campaigns. Add your logo and company information to the GFI ready-to-use documents to customize your marketing material.

To prepare your contact information:

1. [Login](#) to the GFI Partners Portal.
2. Go to top menu **Account > My Account**.

My Contact Information

Contact Info

digest consulting

joe.doe@example.com

joe digest

0000 Carry parkway

carry

NC

carry

000000

United States

Telephone:

111111111

Edit

Website Url

Please enter your website url for marketing purposes.


http://www.example.com

Submit

Co-branding Web Logo

Please upload a low resolution copy of your logo that is suitable for use on this website, for co-branding purposes. this site, will also see your logo within the GFI Customer Area.

File upload size limit is 1.5MB



Choose File

No file chosen

Download

Delete

Upload

Screenshot 2: Contact information page

There are four areas that can be used to customize your information:

Contact info

The information displayed on this page is added to the GFI marketing and sales material as your main contact when using the co-branding feature. Ensure that this is the contact you want to display to your clients.

To change your contact information:

1. Click **Edit**.
2. You can modify the following fields.

Fields	Description
Company	Change or amend your company name.
First name	Edit your first name.
Last name	Edit your family name.
Contact type	Choose between: <ul style="list-style-type: none"> » Billing. A billing contact is responsible for purchases. When your account is set up, you are labeled as a billing contact by default. » Renewal. This is the contact who should receive renewal updates from GFI.

GFI Partners Portal

2 Getting Started | 9

Fields	Description
Email	This is the main email address associated with your account. Use an active mailbox that is constantly monitored.
Further information	Edit you address and phone contact. If billing is sent to your address, it is paramount that it is kept up to date.

3. Click **Save**.

Web URL

The link provided here appears in the customer area of your clients and is also added to the printed and online marketing campaigns.

To add your Web URL:

1. Enter the URL in the text box.
2. Click **Submit**.

Co-branding Web Logo

Upload a low-resolution copy of your logo that is suitable for use on the GFI Customer Area, for co-branding purposes. This way, your logo is displayed on the GFI Customer Area of your end customers.

Ideally the file should have the following characteristics:

Specification	Value
Maximum size	1.5MB
Format	JPEG, GIF or PNG
Resolution	72dpi
Width	100px
Height	100px

To upload the file:

1. Click **Choose File**.
2. Select the file to be used and click **Open**.
3. Click **Upload**.

Co-branding Logo

Upload your print-quality company logo to be used for co-branding purposes on your printed marketing campaigns.

Ideally the file should have the following characteristics:

Specification	Value
Maximum size	4MB
Format	TIFF
Resolution	300dpi
Width	7cm
Height	7cm

To upload the file:

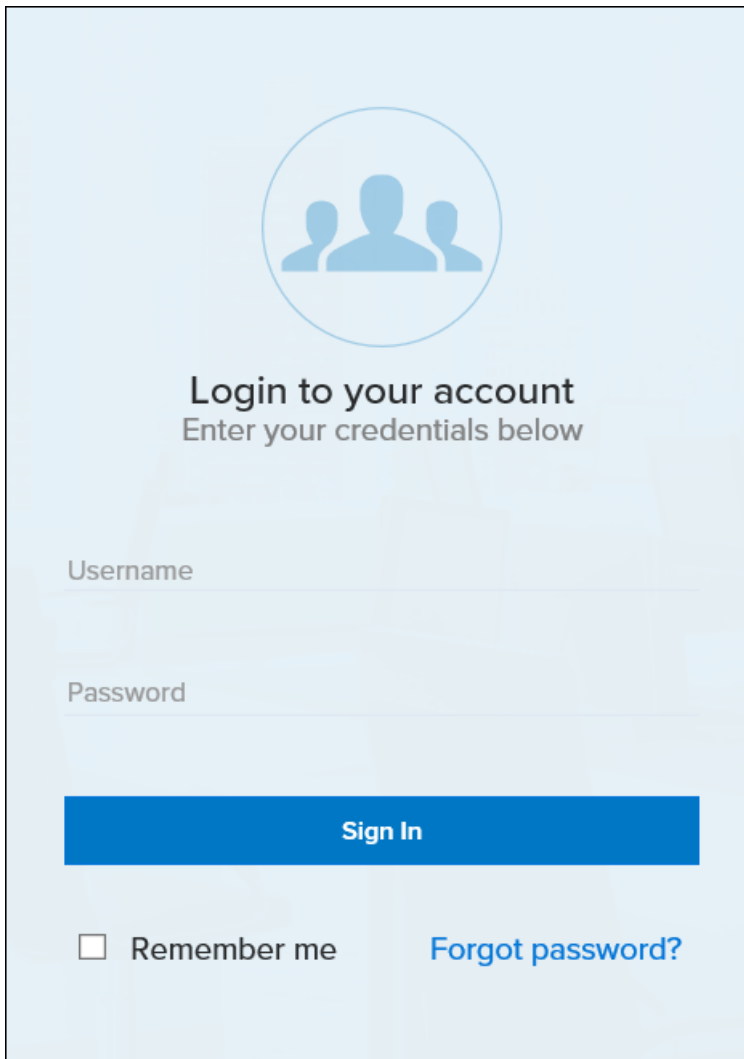
1. Click **Choose File**.
2. Select the file to be used and click **Open**.
3. Click **Upload**.

2.3 Resetting a password

Use the link **Forgot password?** to reset your password in case you lost or forgot it.

NOTE

You have a time limit of three hours to reset your password.

A screenshot of a login page with a light blue background. At the top center is a circular icon containing three stylized human figures. Below the icon, the text "Login to your account" is displayed in bold, followed by "Enter your credentials below" in a smaller font. There are two input fields: "Username" and "Password", both with light blue borders. Below the "Password" field is a solid blue button with the text "Sign In" in white. At the bottom left is a checkbox labeled "Remember me". To its right is a blue hyperlink that says "Forgot password?".

Username

Password

Sign In

☐ Remember me [Forgot password?](#)

Screenshot 3: Link to reset password

To reset your password:

1. Using the browser of your preference navigate to <https://accounts.gfi.com>
2. Click the link **Forgot password?**
3. Enter your email address in **Email**.

4. Click **Submit**.
5. Open your mailbox and find the email from GFI sales. Check the junk folder if you cannot find the email in your inbox.
6. Click on the link provided to reset your password.
7. Type the new password twice.
8. Click **Reset**.
9. Go back to the login page and enter the new credentials.

2.4 Adding users

If your organization has multiple people in charge of unique facets of your business, you can add them as contacts under your account. You can add as many contacts as you need.

Users can have access to the GFI Accounts Portal and are able to execute administrative tasks and have full access to training and certifications.

To add a new user to your account:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Home > My Users**.
3. Click **Add user**.

General

General information

Contact

Billing

Firstname

Firstname

Email

Email

Fax

Fax

Import from primary

Lastname

Lastname

Telephone

Telephone

Mobile

Mobile

Address information

Address

Address

Address

Address

Address

Address

Zipcode

Zipcode

Country

City

City

Cancel

Save


Screenshot 4: New user details

- (Optional) If there is a user added that has common information click **Import from primary**.
- Type in the users' details.
- Click **Save**.

2.5 Login credentials

For convenience, GFI Accounts Portal allows you to change your login details, including username and password.

To change your login details:

- Login to the GFI Accounts Portal.
- Go to **Accounts > Users**.
- Under the **Action** column click the  icon next to the user you want to change the login details.
- Click **Reset Password**.
- Edit the following fields:

Field	Description
Username	Type a new username to change it. Leave the pre-populated username to keep it.
Current password	Type the password in use.
New password	Type a new password. Secure password should use include a mixture of upper and lowercases, numbers and special characters.
Confirm password	Retype the same password entered above.

6. Click **Save**.

3 Managing your customers accounts

In this section, learn how to upgrade your license key, get a price quote or buy a new product.

Topics in this section:

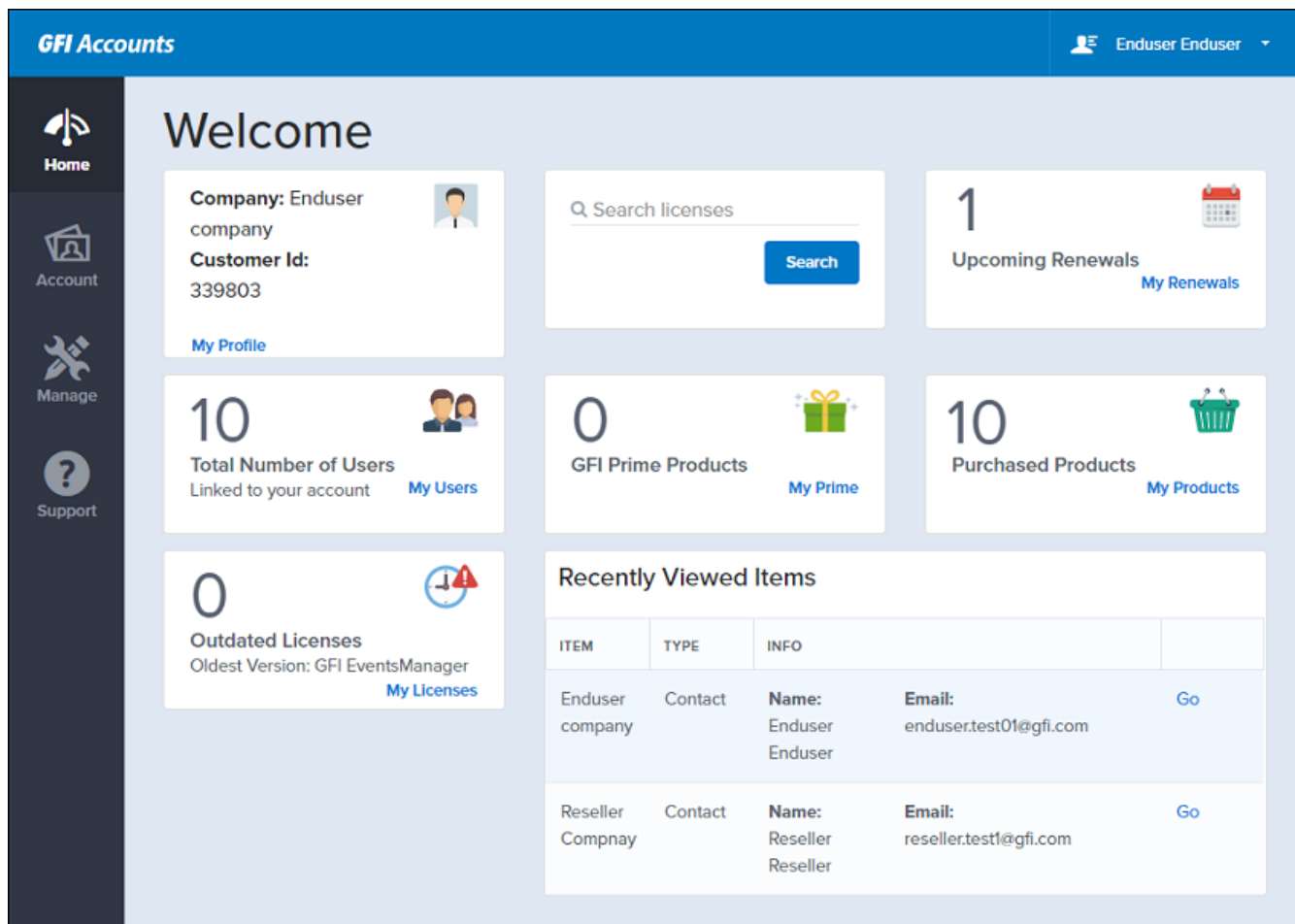
3.1 Accessing the Accounts portal	15
3.2 Creating a new account	16
3.3 Managing users	18
3.4 Managing licenses	19
3.5 Updating account details	21
3.6 Getting a quote	22
3.7 Purchasing a new product	23
3.8 Renewing a license or subscription	27
3.9 Upgrading a license key	28
3.10 GFI Unlimited	30
3.11 GFI Prime	35
3.12 Locating an account	36

3.1 Accessing the Accounts portal

The GFI Accounts Portal allows partners to manage their accounts and their clients' accounts.

To access the GFI Accounts Portal:

1. On your favorite browser navigate to <https://accounts.gfi.com/>
2. Provide the same credentials for the GFI Partners Portal and click **Sign In**.



Screenshot 5: GFI Accounts Portal interface

The GFI Accounts Portal allows partners to:

- » [upgrade account details](#)
- » [change login credentials](#)
- » [add users](#)
- » [contact support](#)

3.2 Creating a new account

GFI partners can create new accounts for their customers. This is useful when a partner is registering an opportunity. The form requires them to provide the customer ID, which requires the customer to have a GFI account, which would be created by the partner. Or if the customer is requesting to purchase a product and they do not yet have a GFI account, then it should be created by the partner.

To create a new account:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Manage > Customers**.
3. Click **Add account**.

Home

Manage

My products

Buy Now

Support

GFI Accounts

Search

Menu

Joe Doe

Home / Customers / Create account

Create account

Create

Contact details

First name

Telephone

Last name

Mobile No

Email

Fax

Please ensure these details are correct as they will be used to display pricing.
Email, country, zip code and state (where applicable) are required.

Account settings

Vat/Tax

Website

These are the settings that will setup the base of the account.

Address details

Company

City

Address

ZipCode

Country

Malta

Please ensure these details are correct as they will be used to display pricing.
Email, country, zip code and state (where applicable) are required.

Feedback

4. Type in the account's details:

Field	Description
First name	Type the name of the main contact for the new account.
Last name	Type the surname of the user entered above.
Email	Enter the email address of the main contact for the account.
Telephone	Enter the telephone number of the main contact.
Mobile No	Type in the mobile number of the main contact
Fax	Enter a fax number where to contact the user.
Company	Enter the company's name.
Address	Type in the main address of the company.
Country	Select a country from the drop-down menu.
City	Enter the city name.
ZipCode	Enter the zip code.

Field	Description
Vat/Tax	Type in the tax number of the company
Website	Enter the web site of the company if available.

5. Click **Create**.

The partner then needs to inform the client to access <https://accounts.gfi.com>, use the email address as username and reset the password.

3.3 Managing users

GFI Accounts Portal allows users that are members of the Accounts administrator groups to manage users for their accounts. By default the primary contact for an account is member of the Account administrator group.

Account administrators can change group membership, set a user as primary contact, and remove users.

General **User Groups**

Assign group membership

Select group
Account administrators ▼ **Add**


GROUP	PRODUCT	ACTIONS
Users	All Products	Remove -

Cancel **Save**

Screenshot 7: Group membership options

Changing group membership

To change group membership for a user:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Account > Users**.
3. Click the  icon next to the user you want to change the group membership.
4. Click **Edit**.
5. Under the **User Groups** tab select a group:

Group	Description
Users	Users can login to the GFI Accounts Portal, but cannot perform administrative tasks.


Group	Description
Account Administrators	Users with full permissions on the GFI Accounts Portal. Members of this group can add, edit or remove users and execute other administrative tasks like purchasing a new product.

6. Click **Add**.

7. Click **Save**.

Removing group membership


To remove the group membership for an user:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Account > Users**.
3. Click the  icon next to the user you want to change the group membership.
4. Click **Edit**.
5. Click **Remove** next to the group that the user is a member of.

Setting a primary contact


A primary contact can be used to pre-populate information when adding contacts. This feature saves time when adding many users with common details.

To set a user as primary contact:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Account > Users**.
3. Click the  icon next to the user you want to change the group membership.
4. Click **Set as primary**.

Removing a user

To remove a user:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Account > Users**.
3. Click the  icon next to the user you want to change the group membership.
4. Click **Remove**.

3.4 Managing licenses

The GFI Partners Portal allows you to view the GFI Software keys registered to your end-users, the number of seats, and the validity of the Software Maintenance Agreement (SMA), if applicable for that key.

To manage end-user licenses:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Manage > Licenses**.

GFI Accounts							Reseller
Licenses Accounts							
Licenses 60							Q Search Filter Action
Filters:							
PRODUCT	ENDUSER	RESELLER	SEATS	PURCHASE	EXPIRES	ACTIONS	
<ul style="list-style-type: none"> GFI LanGuard 12 (NFR) 25 Nodes - Professional Edition 	Demo - EndUser ryan.gatt121@gfi.com Malta 21527	Reseller Compnay reseller.test1@gfi.com Malta	25	Apr 19, 2016	Apr 19, 2016		
<ul style="list-style-type: none"> GFI LanGuard 12 1 Nodes - Professional Edition 	Demo - EndUser ryan.gatt121@gfi.com Malta 21527	Reseller Compnay reseller.test1@gfi.com Malta	1	Apr 19, 2016	Apr 19, 2017		
<ul style="list-style-type: none"> GFI LanGuard 2015 1 Nodes - Professional Edition 	Demo - EndUser ryan.gatt121@gfi.com Malta 21527	Reseller Compnay reseller.test1@gfi.com Malta	1	Apr 19, 2016	Apr 19, 2016		
<ul style="list-style-type: none"> GFI LanGuard 12 2 Nodes - Professional Edition 	Demo - EndUser ryan.gatt121@gfi.com Malta 21527	Reseller Compnay reseller.test1@gfi.com Malta	2	Apr 19, 2016	Apr 19, 2018		
<ul style="list-style-type: none"> GFI LanGuard 12 1 Nodes - Professional Edition 	Demo - EndUser ryan.gatt121@gfi.com Malta 21527	Reseller Compnay reseller.test1@gfi.com Malta	1	Apr 19, 2016	Apr 19, 2017		
<ul style="list-style-type: none"> GFI LanGuard 2015 4000 Nodes - Professional Edition 	Demo - EndUser ryan.gatt121@gfi.com Malta	Reseller Compnay reseller.test1@gfi.com Malta	4000	Jan 5, 2016	Jan 5, 2016		
Show 10 results							Previous 1 2 3 4 5 Next

Screenshot 8: Manage license options

The GFI Accounts Portal offers administrator the option to search for a certain license key, what can be handy in case of a large number of licenses.

Using filters

The GFI Accounts Portal allows user to narrow down the search field using filters.

To add a filter:

1. Click **Filter**.
2. Define your filter using a combination of the options below:

Section	Description
Settings	Customize the search based on particular settings.
Account	Use account details as a search criteria.
GFI Prime	Search based on the available vouchers for GFI Prime.
License settings	Use the type of license to narrow down the search.
License	Use the license status to restrict the search.
Product	Refine the search based on specific products.

3. Click **Apply**.

Use the **x** next to a filter option to remove it or click **Clear filters** to remove all filters.

Creating a new License

To obtain a new license:

1. Expand **Action** and click **New License**.
2. Select the options for the license:

Options	Description
Select a product	Select one of the available products in the list.
Select a version	Select one of version available for the product select previously
Select a template	Select one of the templates available. Options may vary according to the product selected.

3. Click **Next**.
4. Select a End User.
5. Click **Next** and click **Submit**.

Exporting license details

GFI partners can export the details of this page to an Excel file that can be edited.

To export user details:

1. Click **Action > Export**.
2. Type in a title to be the file name under **Title**.
3. Select one of the contacts linked to the account to receive the email with the file.
4. Check **Schedule this report** to setup a schedule to automatically generate this file. The options available are:

Option	Description
Daily	Select this option to receive the file every day. Specify the time the report should be generated.
Weekly	Select this option to receive the file once a week. Specify the day the file should be generated.
Monthly	Select this option to receive this file once a month. Specify which day and time the file should be generated.
End date	Select this option to set a date to stop receiving the file. Specify the day in the calendar to stop receiving the file.

5. Click **Send**.

An Excel file is sent as an attachment via email immediately or according to the schedule specified.

3.5 Updating account details

GFI personnel uses the information stored in the account details to contact the clients to inform about new product releases, problems with the system, press releases, etc.

Keep this information up-to-date to ensure an open channel of communication is available at all times.

The GFI Accounts Portal allows customer to edit their details easily.

To change your contact information:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Accounts > Account Info**.

3. Click the  icon.

4. Click **Edit Details**.

5. Edit the following fields:

Field	Description
Company	Edit the company name.
Website	Edit the URL of your website.
Firstname	Edit the first name of your main contact.
Lastname	Edit the family name of your main contact.
Type	Select one of the following options: <ul style="list-style-type: none">» Billing. A billing contact is responsible for purchases. When your account is set up, you are labeled as a billing contact by default.» Renewal. This is the contact who should receive renewal updates from GFI.» Technical. A contact that is member of the technical support team.» Marketing. A contact that is member of the marketing team.
Email	Enter the email address of your main contact.
Telephone Fax Mobile	Edit the contact number of your main contact.
Address City Country Zip Code	Edit the address of your company. These details are used for billing purposes.

6. Click **Save Details**.

3.6 Getting a quote

The GFI Website displays a pricing list with all the options available. All prices shown are per node, per year and are exclusive of tax.

GFI LanGuard™				
Discover	Features	Resources	Videos	Pricing
Pricing				
All prices shown are per node, per year and are exclusive of tax.				
Description	Subscription for 1 year	Additional nodes*	Upgrades	Subscription Renewal
25-49 nodes	€26.00	€24.00**	€21.00**	€16.00**
50-249 nodes	€14.00	€13.00	€11.00	€7.00
250-2999 nodes	€10.00	€9.00	€8.00	€5.00
3000+ nodes	Contact us	Contact us	Contact us	Contact us

Screenshot 9: Pricing page on the GFI website

To access the pricing page:

1. Open a browser and navigate to <https://www.gfi.com>
2. Navigate to **Products and solutions > [GFI Product] > Pricing**.

For questions about quotes, a dedicated team is standing by to assist you. To get help from a quote specialist, send detailed requests and inquiries to quoterequest@gfi.com.

3.7 Purchasing a new product

A license or subscription should be acquired to use all the functions of a product.

Licenses and subscriptions can be purchased from the GFI Accounts Portal.

GFI Software is a channel organization and all purchase request are received and processed by GFI Partners.

Customers can request to purchase a new product using two different methods:

- » [Contacting a GFI partner directly](#)
- » Using the shopping cart - The process to complete a purchase order using a shopping cart is composed of three steps:

- Step 1: Customer start the purchase request
- Step 2: Reseller approves and forward to Distributor
- Step 3: Distributor completes the purchase process

3.7.1 Reseller

Customers can use the GFI Accounts Portal to start the purchase process. When this option is used, the GFI Reseller receives an email with a link to continue with the second step of the purchase process.

To continue the process:

1. Open the email received and click **Quote and order now**.

Screenshot 10: Select your partner options

2. The shopping cart opens with the reseller option selected. Check that your reseller details are correct and click **Next**.
3. The Plan and Term options that the customer chose are already selected. Check that they are correct and click **Select plan** to continue.
4. Revise the **Payment Summary**. Under **Professional Package** you can alter the plan package selected previously and the number of users.
5. Click **Proceed to checkout**.

The request is forwarded to the [GFI Distributor](#) associated to your account.

3.7.2 Distributor

Customers can use the GFI Accounts Portal to start the purchase process. The request is received by the Reseller that revises the details and then forwards the request to a GFI Distributor. At this point, the GFI Distributor receives an email with a link to continue with the third step of the purchase process.

To continue the process:

1. Open the email received and click **Quote and order now**.

The screenshot shows the 'Select your partner' page in the GFI One Guard portal. At the top, there's a blue header with the GFI One Guard logo and a 'Home' link. Below the header, a progress bar indicates four steps, with the first step (a checkmark) being the current one. The main content area has a dropdown menu set to 'Malta' and an 'Add partner' button. Below this, there's a grid of six partner cards. Each card features a profile picture, a name, and contact details like a phone number, email, and website. At the bottom right, there's a 'Back' button.

Screenshot 11: Select your partner options

2. The shopping cart opens, with the reseller option selected. Check that the details of the reseller are correct and click **Next**.
3. The purchase plan and term options that the customer chose are already selected. Check that they are correct and click **Select plan** to continue.
4. Revise the **Payment Summary**. Under **Professional Package** you can alter the Plan package selected previously and the number of users.
5. Select the method of payment:

Payment method	Description
On Credit	Select this option to pay at a later stage. Payment will be due based on your payment terms. Enter the purchase order number.
New payment method	Select this option to make payment immediately using a credit card.

6. (Optional) If you selected **New payment method** you need to enter the credit card details:

Field	Description
Card Number	Type your debit or credit card number.
Security Code / CW	The CW number on your credit or debit card is a security number on the back of your card. It is a three digit number for VISA, MasterCard or Discovery. It is a four digit number for American Express.
Cardholder name	Type in the name of the titular of the card.
Expiration month	Select the month your card expires.
Expiration Year	Select the year your card expires.

7. (Optional) Click **Send to Review** in case you are not sure of all the details. The process will be completed by the GFI SOP team.

8. Click **Buy Now** to complete the purchase.


The customer and reseller are notified via email that the purchase is completed.

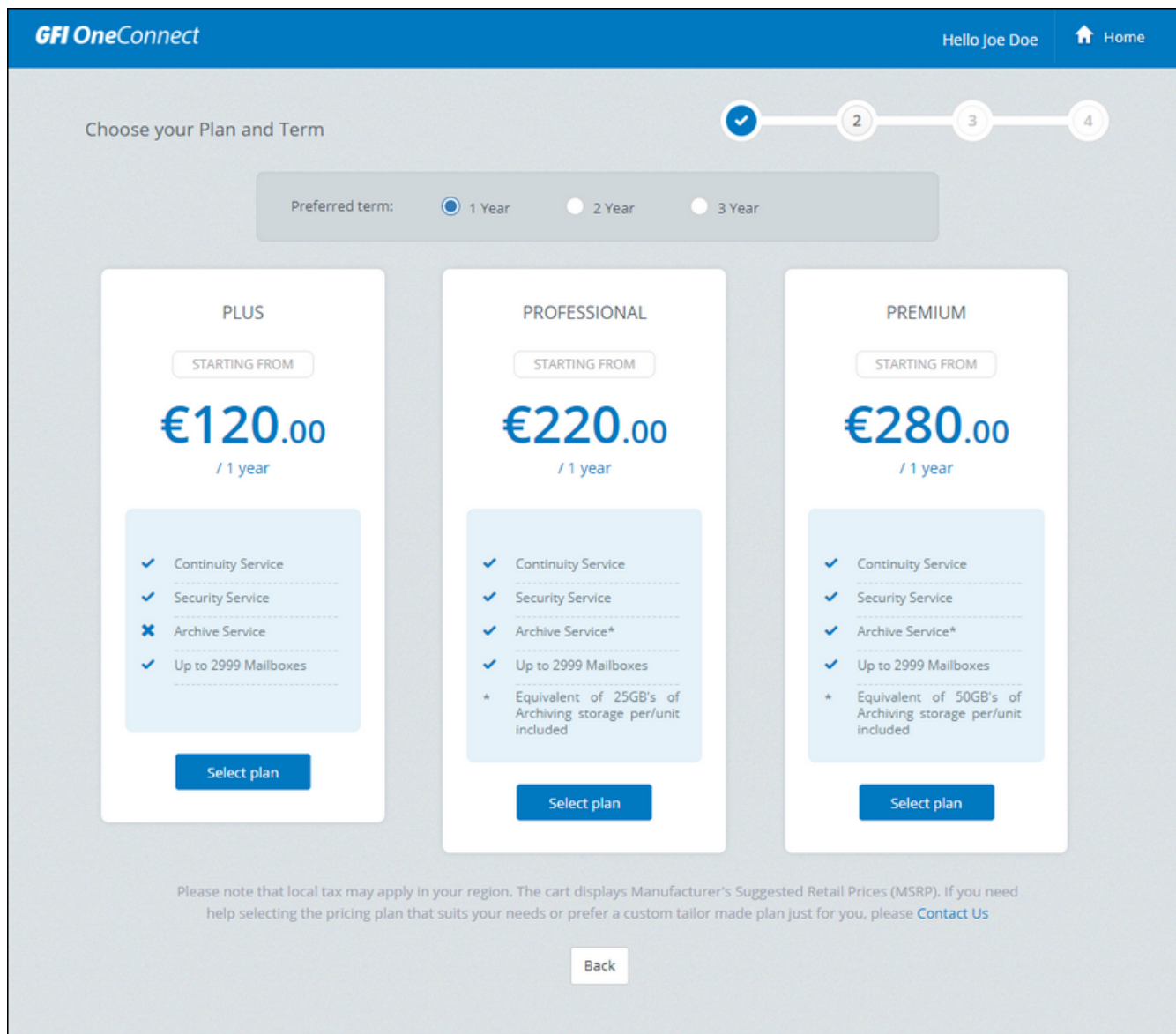
3.7.3 Purchase via Direct Contact

Customers may contact the GFI Partner directly via email or phone to request a purchase. In this case the GFI Partner needs to start the purchase request in the GFI Accounts Portal.

The Customer requires a trial license for this option. The GFI partner can create a new license if the customer does not have one. For more information, refer to [Creating a new License](#) (page 21).

To start a new purchase request:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Manage > License**.
3. Locate the license key of the product. Use the search for faster results. For more information, refer to [Locating an account](#) (page 36).
4. Select the license key.
5. Select the end-user and under the  icon, click **Purchase**.
6. Choose the **Preferred term**. The options are one, two or three years.



Screenshot 12: Plans available for the selected product

7. Select one of the plans available by clicking **Select Plan**. The plans may vary according to the product.

8. Revise your Payment Summary and click **Proceed to checkout**.

If you are the Reseller your request is forward to the Distributor. If are the Distributor you may proceed with the [payment](#). The customer is notified via email that the purchase is completed.

3.8 Renewing a license or subscription

The renewal of a client's license or subscription ensures continuity of support, upgrades and security updates.

Use the GFI Accounts Portal to access the information about your client's license status and to start a renewal process when necessary.

GFI Software Ltd sends several warning emails to alert customers that a license is about to expire. The emails are sent prior to the product's renewal date. If the product license expires, other follow up emails are sent, explaining the steps to take to renew the license.

Hey John, your GFI MailEssentials license renewal deadline is getting close

Your **GFI MailEssentials** license is **expiring in 60 days**. We hope you have experienced the benefits of GFI MailEssentials to provide secure and nuisance-free email that protects your business and improves employee productivity and efficiency. To keep enjoying these benefits, we kindly ask you to renew your license.

Renew now and you will also be automatically enrolled in the **GFI Prime** customer loyalty program, which entitles you to a featured GFI product completely free!

aBc1dE-E23F4-5gHi6-j78K0-9Lm2O-n4680

Renew now

Screenshot 13: Sample of emails sent to clients

When the customer clicks **Renew now** within the email, the system opens a new email pre-populated with the customer's reseller's email address and a request for renewal.

Once you receive the email, access the client's details in the GFI Accounts Portal and proceed to renew. The process is the same as when purchasing a new product. For more information, refer to [Purchasing a new product](#) (page 23).

3.9 Upgrading a license key

GFI products have two methods to implement licensing:

- » Via GFI Account
- » Via license key

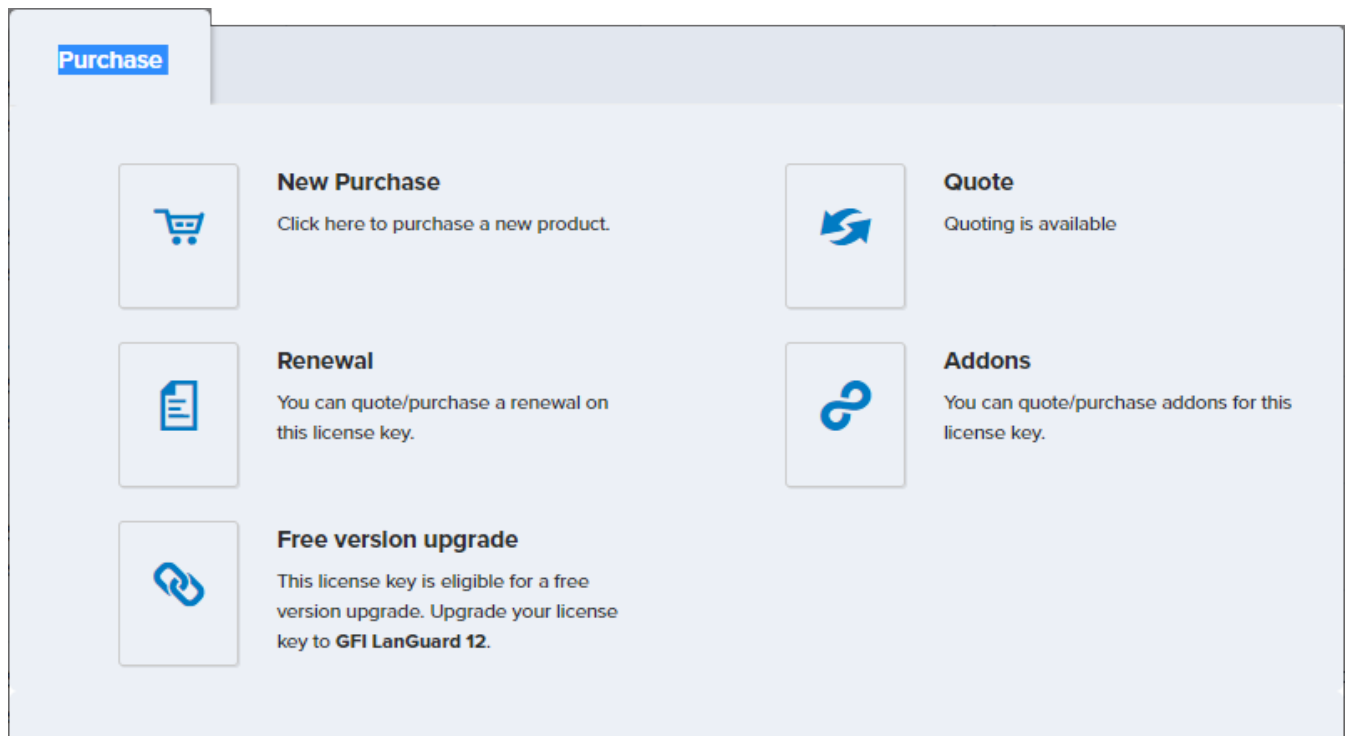
Products that use a license key require a key upgrade when upgrading to a new major version. Clients that have a valid SMA (Software Maintenance Agreement) are eligible for a free upgrade.

NOTE

Once a key has been upgraded, it cannot be downgraded using the GFI Accounts Portal. If you need to downgrade a key, contact the GFI Sales team.

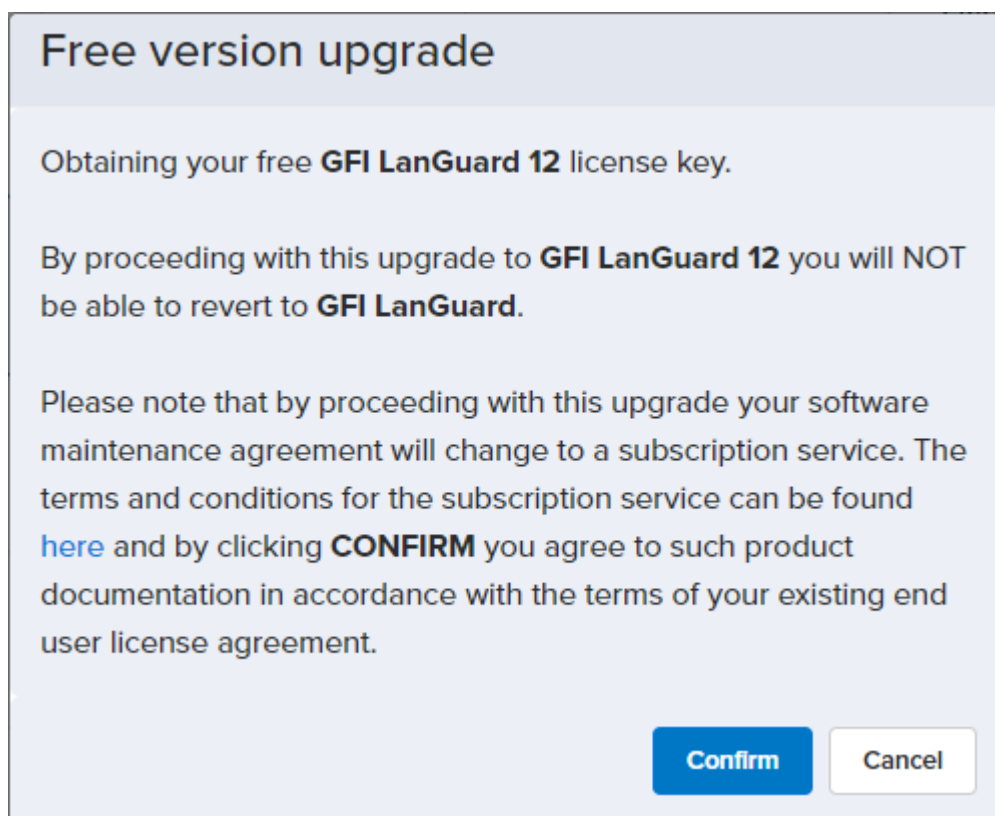
To upgrade the license key for your clients:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Manage > Licenses**.
3. Select the key you want to upgrade and click **Purchase**.



Screenshot 14: Purchase options available

4. Click **Free version upgrade**.



Screenshot 15: Upgrade key option

5. Click **Confirm**.

6. The new key information is displayed. Copy and safely store your new license key.

3.10 GFI Unlimited

GFI Unlimited is a subscription option that unlocks access to a wide range of software available on the GFI library, through a single subscription. It provides you the competitive advantage of powering your business needs through one simple and powerful system.

Through GFI Unlimited, customers pay a flat price per user or unit, and can use as many of the included GFI solutions as they need. There are no in-product restrictions and technical support is included for all GFI products used.

Note

Hardware appliances and third-party add-on components need to be purchased separately.

Each GFI Unlimited subscription entitles you to:

- » Every product in GFI Unlimited for the number of devices or users licensed.
- » Full functionality of the software and its features.
- » Unlimited installations of the product as long as the number maximum of seats is not reached.
- » Technical support for all products.
- » Hardware-based deployment available, where applicable.

For more information about GFI Unlimited and its benefits refer to <https://www.gfi.com/gfi-unlimited>

3.10.1 Managing a GFI Unlimited Subscription

GFI Unlimited is a subscription option that unlocks access to a wide range of software available on the GFI library, through a single subscription. It provides you the competitive advantage of powering your business needs through one simple and powerful system.

GFI partners can manage GFI Unlimited subscriptions acquired by their customers from the GFI Accounts Portal:

1. [Login](#) to the GFI Accounts Portal
2. Go to **Manage > Subscriptions**.

GFI Accounts

Partner

Home

Account

Manage

Support

Licenses

Accounts

Subscriptions

Subscriptions

2

Search

Filter

	SUBSCRIPTION				LAST	NEXT	
<div><div>Unlimited Software Sub...</div><div>Membership (Yearly)</div></div>	<div>Demo Enduser</div> <div>joe.test@test.com</div> <div>DC, United States</div> <div>170969687</div>	<div>DEMO-2018032...</div> <div>yes@yes.com</div> <div>ID, United States</div> <div>170969588</div>	<div>DEMO-2018032...</div> <div>peter.zezzi@cha...</div> <div>MT, United States</div> <div>170969562</div>	50	Apr 4, 20...	Apr 4, 20...	
<div><div>Unlimited Software Sub...</div><div>Membership (Yearly)</div></div>	<div>DEMO-2018032...</div> <div>joey@ras.co</div> <div>IA, United States</div> <div>170969596</div>	<div>DEMO-2018032...</div> <div>yes@yes.com</div> <div>ID, United States</div> <div>170969588</div>	<div>DEMO-2018032...</div> <div>peter.zezzi@cha...</div> <div>MT, United States</div> <div>170969562</div>	100	Mar 29, ...	Mar 29, ...	

Screenshot 16: Subscriptions node on the GFIAccounts Portal

The subscription page contains relevant information about GFI Unlimited subscriptions:

Field	Description
Subscription	The subscription type, status, and duration.
Subscription Owner	The end user who owns the subscription.
Broker	Reseller to whom the end user is linked to.
Invoice Owner	Distributor to whom the reseller is linked to.
Seats	Number of users or devices supported by the license.
Last Billing	Date when the last bill was settled.
Next Billing	Date when the next bill is due.

Navigate to  and choose **View Details** to activate a product through the customer's GFI Unlimited license.

Activating a product license through GFI Unlimited

For a customer to utilize a GFI Product through their GFI Unlimited subscription, that product must be activated. The activation process generates a license key that can be used to install and run the software.

GFI Unlimited product activation can be done either by the [customers themselves](#) from the GFI Accounts Portal, or by the GFI partner on behalf of the customer.

New product installation

» [Activating a GFI Unlimited licence](#)

Existing product upgrade

» [Updating existing licenses to a GFI Unlimited license](#)

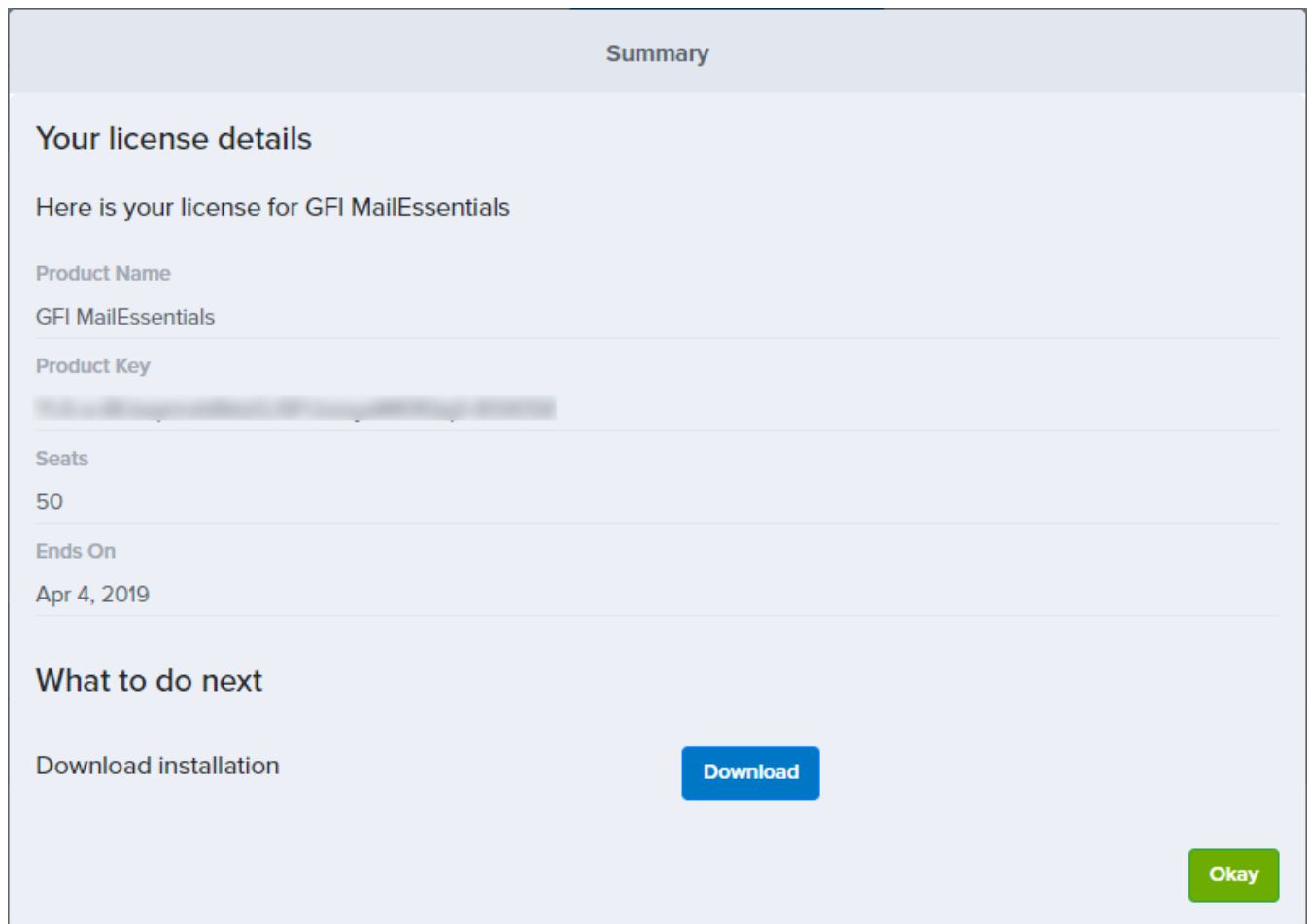
3.10.2 Activating a GFI product on behalf of your customer

If you have a GFI Unlimited subscription, you can generate a license key for any of the included GFI products.

License keys generated through a GFI Unlimited subscription have the same seat quantity and expiry date as that defined by the GFI Unlimited subscription.

To activate a GFI product on behalf of your customers:

1. [Login](#) to the GFI Accounts Portal
2. Go to **Manage > Subscriptions > Actions > View Details**.
3. Choose a product and click **Activate**.



Screenshot 17: License details of the activated product

4. The license details of the select product are displayed. Click **Activate**.

NOTE

The wizard does not show you a license key?

Certain products do not automatically generate a license, and a license will be manually provisioned for you by the GFI Orders team.

[Click here for more information.](#)

A summary of your product subscription is displayed including the product license key and the option to download the installer.

Next steps:

1. Click the **Download** button to download and install the product.
2. Use the **Product Key** provided or your GFI accounts details during the installation wizard.

NOTE

For products that require further account provisioning, for example GFI OneConnect, you will be redirected to continue setting up the account.

Refer to the documentation of each product for more information on how to install and configure licensing.

3.10.3 Updating existing licenses to a GFI Unlimited license

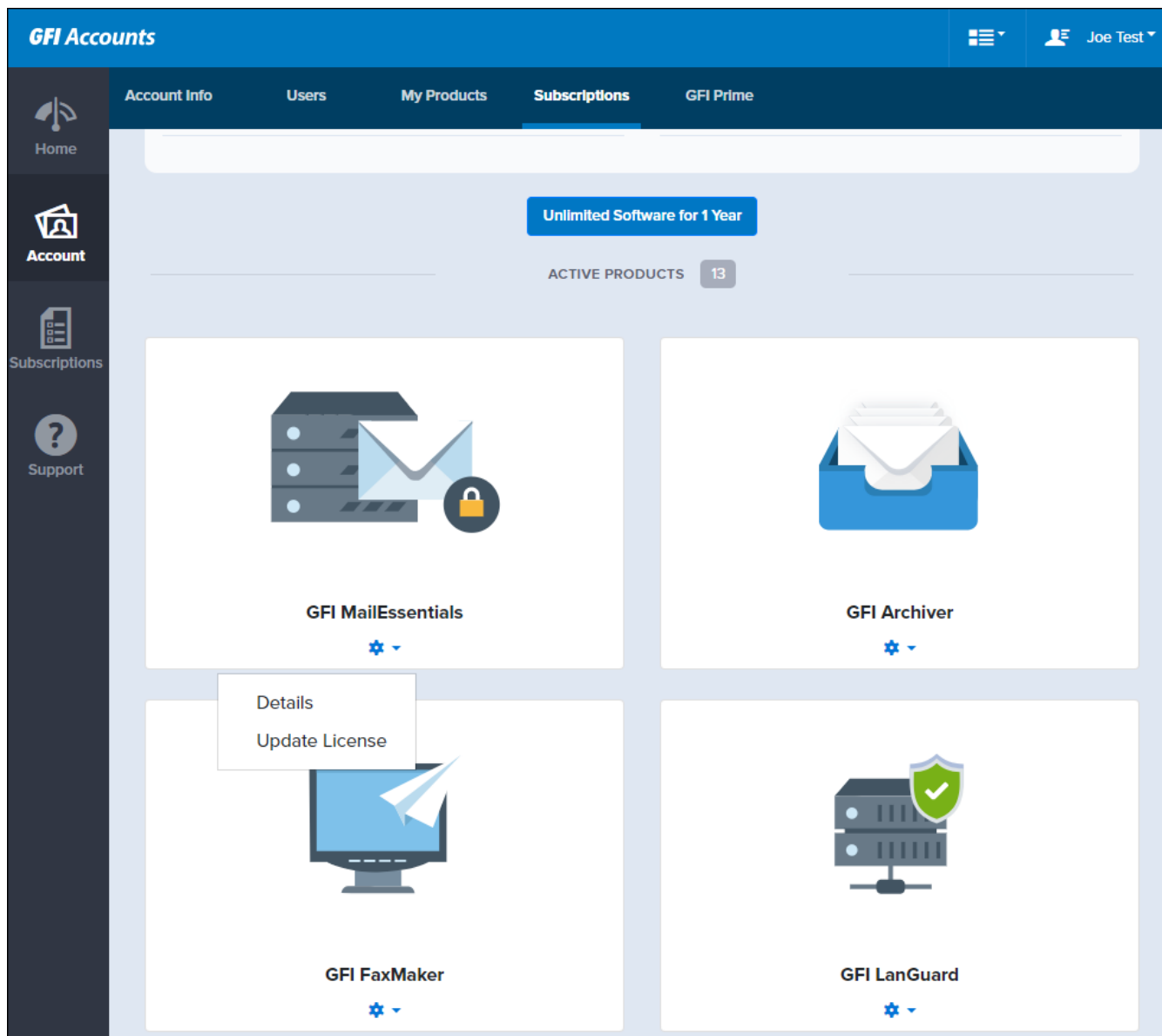
Customers that already have another subscription type with GFI can also benefit from [GFI Unlimited](#).

For an existing customer to utilize a GFI Product through their GFI Unlimited subscription, that product license needs to be upgraded. The upgrade process generates a license key that can be used to run the software.

GFI Unlimited product upgrades can either be done by the customers themselves from the GFI Accounts Portal, or by the GFI partner on behalf of the customer.

NOTE

Partners should have their customer details at hand to be able to proceed. If required you can use the GFI Accounts Portal to [locate your customer details](#).



Screenshot 18: Update License option under subscriptions

There are two methods to upgrade a product:

Upgrading to GFI Unlimited automatically

A GFI product can be updated automatically:

1. [Login](#) to the GFI Accounts Portal as a customer
2. Go to **Account > Subscriptions**.
3. Select **Update License** on specific product that you would like to use.
4. The summary page is displayed. After reviewing the information, click **Update**.
5. A summary of your product is displayed, including the GFI Unlimited license key. Click **Okay**.

Upgrading to GFI Unlimited manually

Products that cannot be updated automatically, require the GFI Orders team to send you the license key:

1. [Login](#) to the GFI Accounts Portal as a customer
2. Go to **Account > Subscriptions**.
3. Select **Update License** on the specific product that you would like to use.
4. The summary page is displayed. After reviewing the information, click **Update**.
5. The update request is then sent to the GFI Orders team for processing. Click **Okay**.

Customers and partners are notified once the upgrade is complete and the upgraded license is ready to use.

3.11 GFI Prime

At GFI Software, we appreciate our loyal customers. To show our appreciation, we developed a loyalty program to generously reward you with a host of special deals, offers and solutions available to all who qualify.

The GFI Prime program enables partners:

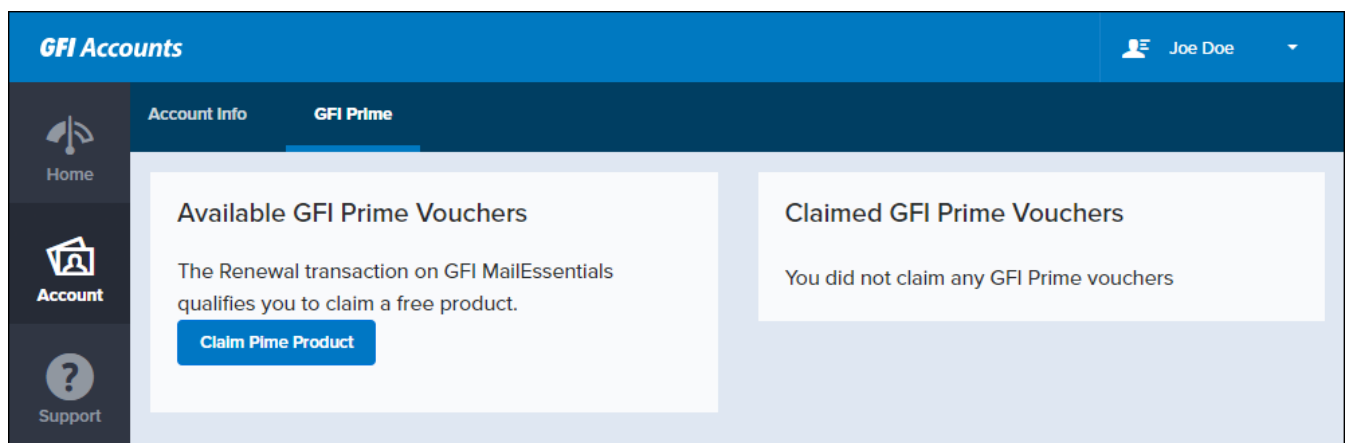
- » To thank customers for their loyalty.
- » To give incentive for customers to renew their subscription.
- » To have customers to try new products.
- » To provide more services to their customers.

NOTE

Using the GFI Accounts Portal to claim GFI Prime Products requires that the customer has already become a GFI Prime member and have an available claim.

To check the entitlement of one of your clients:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Manage > Accounts** and use the search to [locate the user account](#).
3. Go to **Account > GFI Prime**.



Screenshot 19: GFI Prime entitlement

4. Click **Claim Prime Product** under **Available GFI Prime Vouchers**.
5. Select one of the available Prime products under **Select the GFI Prime product to claim**.
6. Click **OK**

Claimed vouchers are listed under the **Claimed GFI Prime Vouchers** section.

For further information about the GFI Prime initiative visit <https://www.gfi.com/prime>.



3.12 Locating an account


The GFI Accounts Portal brings a search engine that helps find the customer account associated with a license. This is useful, for example, when a customer attempts to activate the license of their product, but they do not know the details of their login account.


To use the search in the Accounts Portal:


1. [Login](#) to the GFI Accounts Portal.
2. Go to **Manage > Licenses**.


GFI Accounts

  Joe Doe

 Home

 Account

 Manage

 Support

Licenses

Accounts

Licenses 9

Q digest

Filter

Action

Filters: Multi Criteria: digest Clear filters

PRODUCT	ENDUSER	RESELLER	DISTRIBUTOR	SEATS	PURCHASE	EXPIRES	ACTIONS
GFI FaxMaker O...	digest consulting stevedigestconsult... NC, United States 348027				10/06/2016	14/07/2016	
GFI FaxMaker O...	digest consulting stevedigestconsult... NC, United States 348027				27/04/2016	31/05/2016	
GFI FaxMaker O...	GFIDOMTest dtest2@emailguar... NC, United States	digest consulting stevedigestconsult... NC, United States 348027			17/03/2016	20/04/2016	
GFI OneConnec...	digest consulting stevedigestconsult... NC, United States 348027			U...	04/02/2016	04/04/2016	

Screenshot 20: Search function

3. In the **Search** field, type the company name of your customer account.
4. In the **ENDUSER** column, locate the email address associated with the account.

To access the GFI Accounts Portal, a customer can use the email address found under **ENDUSER** as their account username. If the client does not remember their password, they can reset it. For more information, refer to [Resetting a password](#) (page 11).

NOTE

If you cannot find your customer account, or you do not see their license, contact your distributor.

4 Training Portal

The GFI Training Portal hosts instructional content that GFI partners can use to become familiar with GFI products. The portal hosts a series of courses and modules that enable the trainees to pace their training and to revisit specific modules for revision. Trainees can then take the exams to acquire certifications.

Topics in this section:

4.1 Logging to the Training Portal37

4.2 Starting a course38

4.3 Taking an exam39

4.1 Logging to the Training Portal


GFI Partners can log in into the GFI Training Portal to get familiar with GFI products, and also get certified at sales and technical levels. The portal hosts a series of courses and modules that enable the trainees to pace their own training and to revisit specific modules for revision.

Use the same credentials that you use to access the GFI Partners Portal.

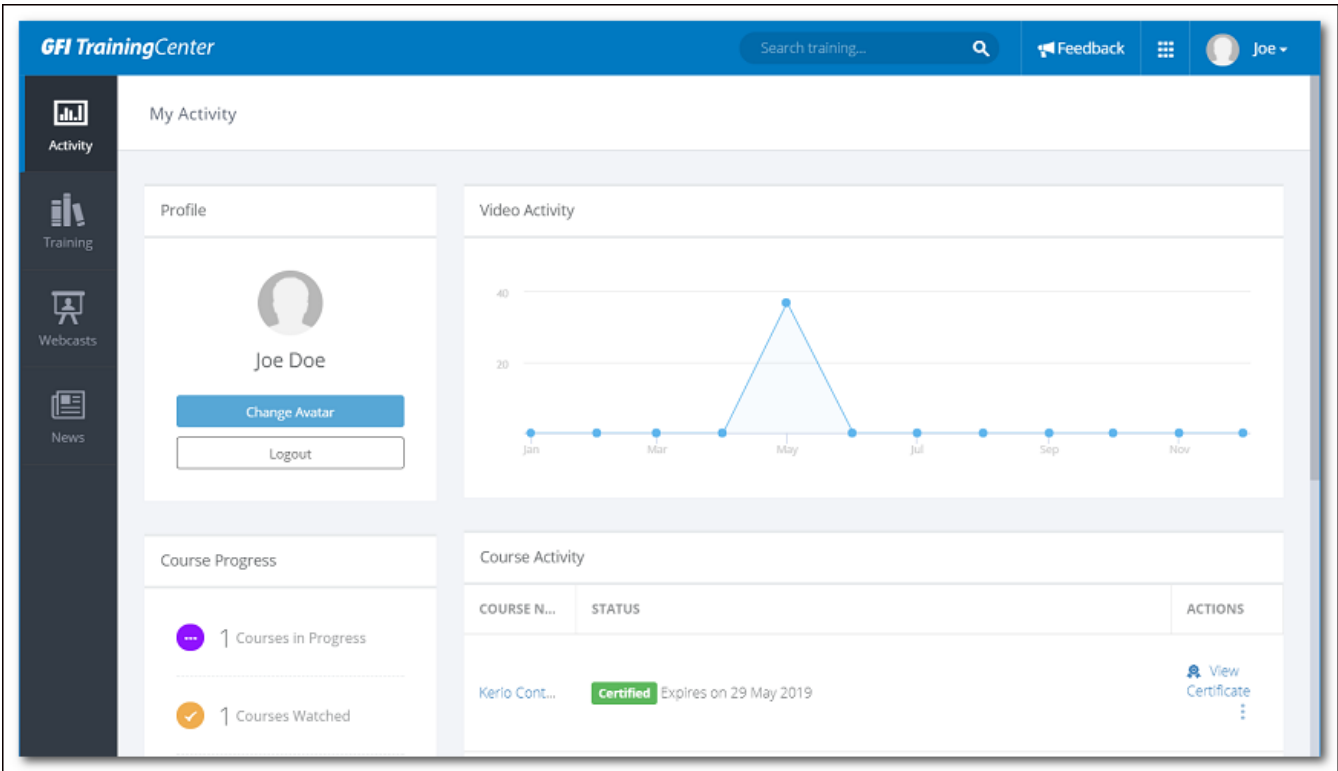
If you receive an invalid username or password message you can [reset your password](#).

To start using the GFI Training portal:

1. [Login](#) to GFI Accounts Portal.

2. Click the  icon and then click Training Portal. Alternatively, on your favorite browser navigate to <https://training.gfi.com>

3. Type your credentials and click **Login**.



Screenshot 21: GFI Training Portal interface

Upon a successful login, the user is redirected to the training portal site. The opening page is the Activity node where an overview of course progress is displayed.

In the dashboards available, the user has a graph showing the courses that were taken in the last thirty days, the total number of courses including completed, in progress and certified ones. It is also possible to start an exam for the courses already completed or to view certificates already obtained.

4.2 Starting a course

The courses offered are the core of the GFI Training Portal. There is a page for each GFI product. Inside each page, there are the courses available on that product.

Each course is comprised of a number of modules. Each of these individual modules can be paused, forwarded or rewinded. This enables users to have full control of the pace of their training.

There are two different types of courses offered:

Course	Description
Level 100	<p>The level 100 training courses are meant both as an introduction to the GFI products as well as to provide sales and marketing personnel with the required information on how market and pitch the product to customers. The aim of these courses is to answer the following questions:</p> <ul style="list-style-type: none">» What is this product and which problems it solves?» How it helps solving the problems?» What are the main features of the product?» How is this product being offered? <p>Users can take an exam after ending the course. An exam completed with 70% or higher leads to a certificate.</p>
Level 200	<p>The Level 200 courses are meant as a more in-depth, technical training for GFI Products. The objectives of these courses are to cover the following areas:</p> <ul style="list-style-type: none">» How to install.» How to upgrade from a previous version.» How to start the initial configuration.» How to customize and fine tune the product.» How to generate reports and outputs. <p>Due to the length and complexity of this level of training some exercises are offered alongside with the theory to allow the trainee to have some hands-on experience.</p> <p>Users can take an exam after ending the course. An exam completed with 70% or higher leads to a certificate.</p>

There are also two types of complementary modules:

Module	Description
How-to Videos	<p>How-to Videos are short courses with two main focus:</p> <ul style="list-style-type: none">» A particular feature of a product .» An important issue and how the GFI products can help to deal with such problems.
Top-up	<p>The top-up courses are short videos courses that bring information about new features introduced in the products or some new trends. The aim is to keep the content up to date and extend coverage to areas that need more focus.</p>

To start a course:









1. [Login](#) to the GFI Training Portal using your partner credentials.
2. Click the **Training** tab and select the product you want to learn more about.
3. Locate the course and click **Start Course**. Level 100 and 200 courses enable you to use the play button for each single chapter.

The training video starts immediately and the trainee just needs to follow the contents and instructions.

The Play bar at the bottom offers various features which the trainee can use to control the pace of the training.



The controls available are:

Icon	Description
	Play/Pause. Click to toggle between play and pause.
	Backward. Click to move the video backwards to the previous module.
	Forward. Click to move the video forwards to the next module.
	Sound. Slide the control bar to increase or decrease the volume.
	Subtitles. Click to turn subtitles on and off.
	Settings. Click to expand the settings: <ul style="list-style-type: none">» Auto-play. Turn on and off auto-play.» Subtitles. Turn on and off the subtitles.» Subtitles Languages. Select the language for the subtitles.» Player Hotkeys. Expand to see available hotkeys.
	Toggle full screen. Click to expand/exit full screen.
	Toggle Sidebar. Click to show/hide the side bar.

4.3 Taking an exam

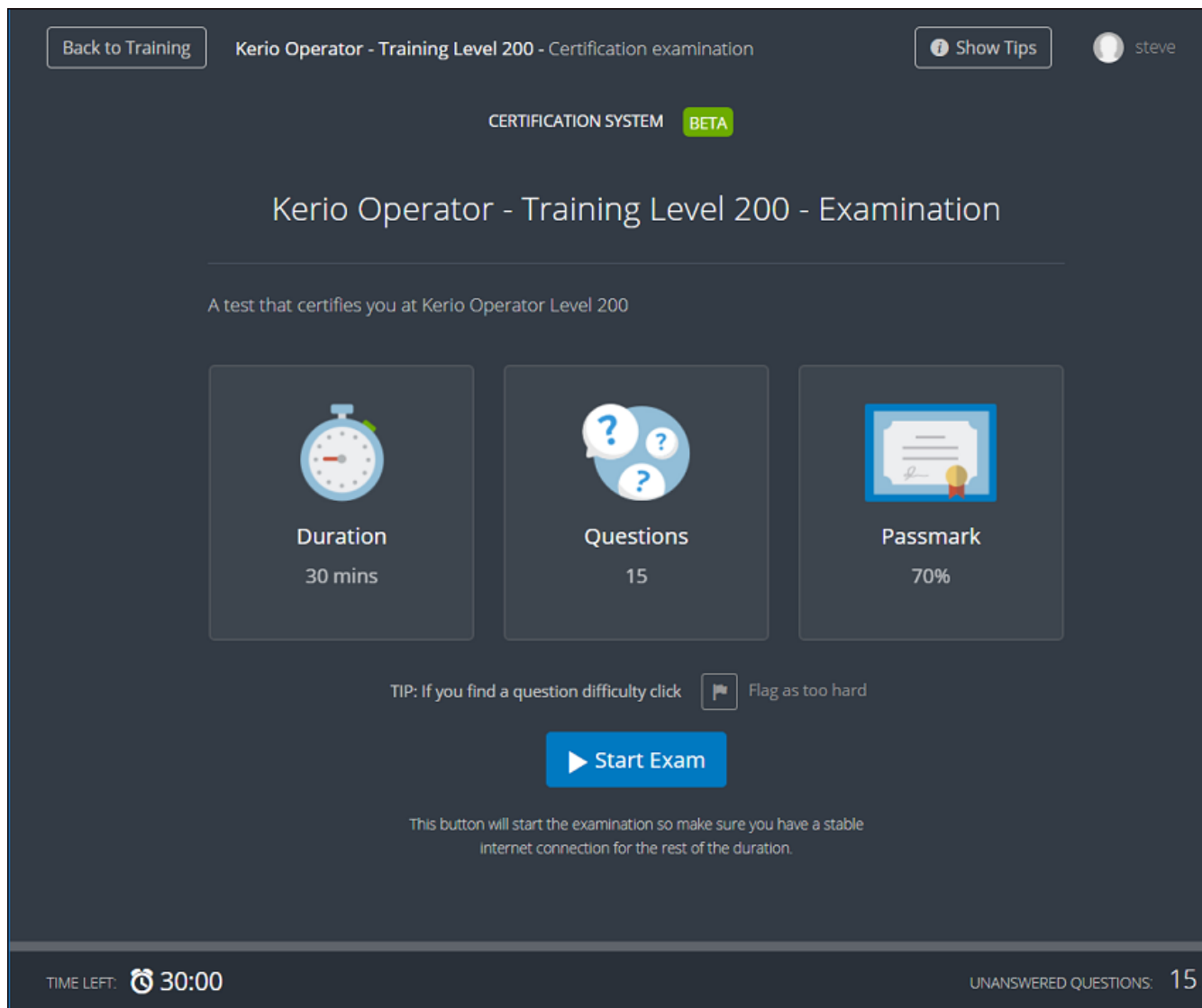
Courses that lead to a certification have an exam that is used to measure the trainee's grasp and understanding of the course taken. Exams consist of a number of multiple choices questions related to the material covered during training.

NOTE

Ensure that you have a stable Internet connection during the time to take the exam.

IMPORTANT

There is a limit of three attempts within a twenty-four hour period for a single product. Failing that same exam three more times within the next twenty-four hour period permanently blocks the user from accessing the training portal.



Screenshot 22: Starting an exam

To start an exam:

1. Press the button **Take an Exam**.
2. Click **Start Exam**.
3. Answer the questions displayed on the screen.
4. Click **Finish Exam** to complete the test.

If the final result is above the threshold of 70%, a certificate is sent to the user via email.

If the result is below the threshold, the trainee can take the test again. There is a limit of three attempts within a twenty-four hour period for a single product. In this case, it is recommended that trainees re-visit the training material to improve their knowledge of the product and gain a better chance of passing the exam next time.

The option to take the exam is removed from the courses where the user has already received a certification.

5 Resource Center

The GFI Resource Center hosts a large amount of materials and resources that provide our partners with efficient tools to enhance their sales prospects and help customers make informed decisions about the best package to acquire.

Learn also how the GFI Partners Portal can help partners increase their margin of profit using the resources available with deal registration, price books, and partner linking.

Topics in this section:

5.1 Co-branding	41
5.2 Accessing Resources	42
5.3 Price books	46
5.4 Deal Registration	46
5.5 Partner Linking	47
5.6 Download Express	48
5.7 Webinars	49
5.8 Feedback and Feature Requests	50
5.9 Insider Program	52

5.1 Co-branding

Co-branding is an easy way to get material to your customers with all the information provided by GFI Software Ltd co-branded with your company logo and contact information.

All GFI Partners have access to a self-service system for customizing GFI sales and marketing documents and collateral. Add your logo and contact information with just a few clicks to get started.

To facilitate your co-branding experience, access the GFI Customer Area and ensure that your company information is correct and that you have already uploaded your company logos. For more information, refer to [Editing your company information](#) (page 8).

More information about co-branding can be found on this video: <http://partners.gfi.com/CoBranding-instructions.htm>

To prepare your material:

1. [Login](#) to the GFI Partners Portal.
2. Click **GFI Resource Center**.

Resource Center

To access the documents you need, follow these steps:

1. Select the product you want to promote from the list below
2. Choose the document type you require
3. Select the language you require. Watch a [quick video](#) on how to use the resource center.
4. You can also cobrand many of these documents with your own company contact information and logo for free – just follow the simple steps below.

Choose your category	Choose your subcategory	Choose your language
GFI Archiver	Datasheets	English
GFI EndPointSecurity	FAA Datasheet	German
GFI EventsManager	PowerPoint presentations	Italian
GFI FaxMaker	Adverts	French
GFI FaxMaker Online	Posters	Dutch
GFI LanGuard	Roll-up banners	Spanish
GFI MailEssentials	Website banners	
GFI OneConnect	HTML Mailers	
GFI OneGuard	Logos	
GFI Prime	Product comparison sheets	
GFI WebMonitor	Documents	
Kerio Cloud	Screenshots	
Kerio Connect		
Kerio Control		
Kerio Operator		
Exinda Network Orchestrator		
Campaigns		
Corporate		
Partners Specific		
Healthcare		
Compliance		

Welcome back!

Company Name
0000 Carry parkway
carry
carry, NC 00000
United States

Tel: 11111111111

email: joe.doe@example.com
web: http://www.example.com



We will send your
cobranded material to:
joe.doe@example.com

Is this information correct?
You can update your logo and addresses.
Watch [this quick video](#) to learn more!

Update

Screenshot 23: Resource Center options

3. Check the information displayed on the right-pane is correct. That is the information that is displayed on your marketing material. Click **Update** if corrections are needed.
4. Select the product you would like to co-brand under **Choose your category**.
5. Select the type of document you want under **Choose your subcategory**.
6. Select the language under **Choose your language**.
7. Click **Cobrand**.
8. Check your email inbox.
9. Open the email sent by cobrand@gfi.com and click on the link provided. Your material is saved in your default download location.

5.2 Accessing Resources

The GFI Resource Center hosts a large amount of materials and resources that provide our partners with efficient tools to enhance their sales prospects and help customers make informed decisions about the best package to acquire.

The material available on the GFI Resource Center is ready to be downloaded and used by the partner's marketing and sales teams.

The material can be customized with your company logo and information. For more information, refer to [Co-branding](#) (page 41).

5.2.1 Using printed material

The PDF format materials are ready for professional printing, so simply send the PDFs you would like to print to your local printer.

The printed material can be used as follows:

- » Place a few in your office reception so that visitors can easily view them.
- » Distribute them at trade shows and other events.
- » Use them as a guide during training events.

5.2.2 Using PowerPoint presentations

Download the presentation in the language you require. Then, use the Microsoft PowerPoint application to display the presentation.

The presentations can be used as follows:

- » Create a looping version of any of the presentations and leave it running on a monitor during a trade show or event.
- » Present them during training sessions.
- » Use them to present the benefits of the GFI range of products to potential customers.

5.2.3 Using online material for website branding

The GFI Resource Center provides partners with material that can be easily incorporated into their websites.

To add a banner to your website:

1. Download the banner from the Resource Center.
2. Upload the file to a folder on your web server using FTP software, for example: `http://www.yourcompany.com/images/gfi_mailarchiver_banner.gif`
3. Open the file that contains the HTML code for your website with your preferred HTML editor.
4. Insert the code below, editing the fields to your needs.

```
<a href="Website URL" target="_blank"> </a>
```

- Replace **Website URL** with the website address you want to point to. For example, "`http://www.gfi.com`".
- Replace **Image Title** with an appropriate title for the banner. For example, "GFI Software".
- Replace **Path_to_the_file** with the location of the banner image on your server. For example, "`http://www.yourcompany.com/images/gfi_mailarchiver_banner.gif`".

5. Save the file

5.2.4 Downloading resources

To access the GFI Resource Center:

- 1. Login to the GFI Partners Portal
- 2. Click **GFI Resource Center**.

Resource Center

To access the documents you need, follow these steps:

1. Select the product you want to promote from the list below
2. Choose the document type you require
3. Select the language you require. Watch a [quick video](#) on how to use the resource center.
4. You can also cobrand many of these documents with your own company contact information and logo for free – just follow the simple steps below.

Choose your category	Choose your subcategory	Choose your language
GFI Archiver	Datasheets	English
GFI EndPointSecurity	Compliance	German
GFI EventsManager	Adverts	Italian
GFI FaxMaker	Posters	French
GFI FaxMaker Online	Roll-up banners	Dutch
GFI LanGuard	Website banners	Spanish
GFI MailEssentials	HTML Mailers	
GFI OneConnect	Logos	
GFI OneGuard	Screenshots	
GFI Prime		
GFI WebMonitor		

Screenshot 24: Materials available on the GFI Resource Center


- 3. Select one of the categories to see the list of material available for that product or area of interest, for example GFI Prime, Healthcare or Compliance.
- 4. Choose a subcategory with the type of material you wish to download. For each GFI product or area of interest there is a large amount of material available:

Items	Description
Datasheets	A datasheet is a document like a brochure that provides details about a product. The datasheet includes information that can help in making a buying decision by providing technical specifications, a list of advantages and comparison with other products.

Items	Description
White papers	A white paper contains an in-depth study about a particular point or situation presenting in a concise and informative manner. It aims to help readers to understand complex issues and take informed decisions about the best way to solve them.
PowerPoint Presentations	Slides training session that aims as an introduction for the different products covering topics like product overview, their benefits, how to deploy, etc.
Posters	Product adverts. Material ready for printing in a PDF format. You can use the co-branding feature to customize the adverts with your logo and contact information.
Roll-up banners	Banners in different formats. Ideal for use in conferences and seminars.
HTML Mailers	Email campaign formatted in HTML and ready for use.
Product Comparison sheets	Document that compares GFI products against its main competitors highlighting which features are present in each product.
Documents	Inside the documents category there is a different range of options available depending on the product. The most common are evaluation and getting started guides, terminology, sales talk track, etc.
Screenshots	Screenshots of the products' interface showing main interfaces, dashboards, and other relevant information.

5. Select the language.

FaxMaker (850x2050mm)



PDF (with cropmarks)	
Language	Spanish
Office	N/A
File size	717 KB
Last updated	11/9/2015

PDF (without cropmarks)	
Language	Spanish
Office	N/A
File size	606 KB
Last updated	11/9/2015

Download

Cobrand

Download

Cobrand

Screenshot 25: Sample of material available for download

6. Click **Download** to download the material with the GFI branding.

7. Click **Cobrand** to continue with the co-branding process. For more information, refer to [Co-branding](#) (page 41).

5.3 Price books

The GFI Partners Portal grants partners access to download price books that contain subscription prices for various products with all editions and offers available.

The price books are available in two formats:

- » Excel sheets compressed in zip format
- » PDF documents

IMPORTANT

The documents on the pricing page contain CONFIDENTIAL information that is only intended for internal use by employees, authorized distributors and authorized resellers; these documents are not to be disseminated publicly.

Before downloading the price books

Before downloading the price books follow these steps:

1. Clear your web history to remove all previously downloaded GFI price books from the cache.
2. Delete all previously downloaded GFI price books from your download folder.
3. Download the price book relevant to your region.

Downloading the price books

To download the price books:

1. [Login](#) to the GFI Partners Portal.
2. Click **Pricing and licensing**.
3. Select the price book for your region.
4. Download the file.

5.4 Deal Registration

The GFI Partners Portal offers its partners the opportunity to register deals and receive additional support and, more importantly, additional margin on new opportunities that you bring to GFI. With deal registration, we register the opportunity internally as belonging to you.

How does a deal qualify for registration?

For a deal to be considered for deal registration, the deal size must meet the following criteria:

- » The value of the sale, excluding taxes, must be at least: US\$2,500, €2,000, £2,000.
- » The deal must close within 90 days of the registration date.
- » It can be an existing or a new customer.
- » Applies to new business only.
- » Must be from a partner generated lead.
- » The deal must be approved jointly with GFI.
- » GFI will deny any deal where the quote is being submitted to several partners (e.g., tender submissions).

- » You must be a registered GFI partner of Gold, Silver, Bronze, Registered or DMR partner level.
- » GFI distributors cannot apply for deal registration.

Benefit to your company

All qualifying orders are eligible for an additional deal registration margin of up to 10% on the deal. Discounts are passed through usual purchasing channels.

How to register a deal

To register a deal:

1. [Login](#) to the GFI Partners Portal.
2. Go to **Partner links > Deal Registration Form**.
3. Fill the form:

Area	Field	Description
Reseller Information	Reseller ID	Enter your reseller ID. Contact your Channel Manager if you do not know the ID.
	Reseller email	Enter your email address.
End User Information	First Name	Enter your client's first name.
	Last Name	Enter your client's last name.
	Email	Enter your client's email address.
Lead Information	Lead estimated value	Estimated value of the deal. Use the default currency for your region.
	GFI Product	Select the GFI Product from the drop-down list.
	Customer ID	Enter the customer ID.
	Users	Select the approximate number of users from the drop-down list.

4. Click **Submit**.

5.5 Partner Linking

Partner Linking consists of creating links to the GFI website in a particular way, that allows the systems detect which partner sent prospects to the GFI site. Leads generated through partner linking are automatically assigned with the partner's ID number and forwarded to the partner by their GFI Channel Account Manager or through a CRM system, together with the partner's regular leads. By doing this, our partners are guaranteed that any leads generated by them will automatically be protected and assigned back to them.

All that is required is adding the partner's ID number, assigned by GFI Channel Partner ID, to the GFI website URL to which partners wish to link to.

Contact your GFI Channel Account Manager if you are unsure of your Channel Partner ID.

Partner Linking Conditions

The process has the following conditions:

- » If prospects are referred to the GFI website from a partner's website but do not download immediately, they will still be tagged with a partner's ID if they return to our website within 90 days to download a trial.

- » If existing customers belonging to a particular partner, download a new version or another product trial from our website, our systems will automatically associate new leads with the customer's registered partner.
- » If existing customers download from another partner than the one they purchased from previously, the new lead will be associated with the new partner.

How to link to the GFI website using a Channel Partner ID

A partner link generator is available here: http://partners.gfi.com/smart/smart_partlinkgen.htm.

To create partner linking manually:

1. Identify your Partner ID, for example 3232.
2. Identify which GFI page to link too, for example, <http://www.gfi.com/mes/>
3. Add **?cpid=3232** to the URL. For example, <http://www.gfi.com/mes/?cpid=3232>. The CPID attribute value is your Channel Partner ID.
4. Add the link to your website accordingly.
5. Repeat process with as many links as you like.

It is essential that the correct Channel Partner ID is used by the partner and that the correct syntax is used in the link.

5.6 Download Express


The aim of the Download Express page is to offer the GFI Partners quick access to the product installer. It may be useful when a client wants to re-install the product, since the page does not require partners to re-register when downloading installers.

NOTE

Products that have the licensing based in the GFI Accounts instead of the license key does not have the option of the download express .




To access the Download Express page:

1. [Login](#) to the GFI Partners Portal.
2. Click **Express Product download for Partners**.



Web security, internet monitoring and access control


- Monitor and control web activity for improved productivity
- Manage bandwidth and internet usage for cutting costs
- Secure downloads and web browsing for uptime and peace of mind

Get in control of your web activity and protect against web-based threats





GET STARTED FOR FREE

Express partner/customer download



Email security and anti-spam for your mail servers

- Powerful and effective business spam filtering
- Blocks email-borne viruses and other malware
- Granular, user-based email content policy enforcement

Block spam and protect your network from email-borne threats

GET STARTED FOR FREE

Express partner/customer download

Screenshot 26: Download Express page

3. Next to the product you want to download click **Express partner/customer download**.

The installer is saved in your default download location.

5.7 Webinars

The GFI Partners Portal has a number of Webinars available on-demand to all partners.

The GFI Webinars in the GFI Partners Portal provide contents that aim to keep our partners informed about the company and its achievements. Webinars also present prime opportunities for GFI sales and marketing specialists to pass along and present useful information about effective ways to use trending technology to enhance your business prospects, grow your customer base and increase your revenue projections.

To access the webinars:

1. [Login](#) to the GFI Partners Portal.
2. Go to **Partners Links > Webinars**.

Partner webinars

Upcoming webinars

There are currently no upcoming Partner webinars available.

Recorded webinars

GFI Software webinars

Introduction to GFI Products: [Watch the webinar here](#)

GFI Portals overview: [Watch the webinar here](#)

GFI Partner Program announcement: [Watch the webinar here](#) | [Download the FAQ document](#)

The GFI journey and progress so far: [Watch the webinar here](#)

GFI OneGuard: Introduction webinar for Partners and Distributors: [Watch the webinar here](#)

GFI OneConnect: Introduction webinar for Partners and Distributors: [Watch the webinar here](#)

Kerio webinars

Introduction to Kerio Products: [Watch the webinar here](#)

Protecting Kerio Connect Server from Spam and Mail Abuse: [Register to watch the webinar here](#)

Screenshot 27: Webinars available on the GFI Partners Portal

3. Click the link **Register to watch the webinar here**, next to the webinar you would like to attend.

4. Enter your name and email address and click **Register**.

Upcoming webinars offer a link to access the webinar and the option to add it to your calendar. Recorded webinars are ready for watching.

5.8 Feedback and Feature Requests

The GFI Partners Portal has a space to partners' feedback and product feature requests.

If you have an idea for a new feature, or if you have an idea to make an existing feature better, use the portal to publish it. Your idea may have already been requested by another member of our community, in which case, you can add your vote. The more votes a feature gets, the higher the probability that it could be implemented in the future.

GFI LanGuard

← [GFI Feedback & Feature Request Community](#)

How can we improve?

Hot

Top

New

Category

Status

My feedback

16

votes

Vote

Show if PC is on or off

Could you put a green or red little light next to the PC names to show whether the PC is turned on or off. Something like a quick ping test every 1-2mins (allow the user to change this) to check the status of the PC.

4 comments · [Flag idea as inappropriate...](#)



COLLECTING FEEDBACK

· [Heather Paunet \(Admin, GFI\)](#) responded

We like this idea. Please vote if this is important to you.

Screenshot 28: Idea posted on the Feedback portal

GFI Software's Product team reviews the requests frequently, and feedback and votes are taken into consideration when setting the priorities for the upcoming releases.

To login to the Feedback portal:

1. [Login](#) to the GFI Partners Portal.
2. Go to **Product Resources > Product Feedback**

Alternatively, you can navigate directly to <http://feedback.gfi.com> and sign in with your partner credentials.

To post a new idea

New ideas are always welcomed. To help group ideas with common objectives, a search is available to verify if some similar idea is already posted.

To add a new idea:

1. Select the product you want to add an idea.
2. Type a title for your idea and click the search icon. The portal displays all entries that match your title.
3. Click **Post a new idea** if none of the ideas available match your request.
4. Select a category. Categories vary according to the product selected in step 1.
5. Type in the description of the feedback or the feature request in the text box.
6. Click **Post Idea**.

To comment on posted feedback

GFI partners are encouraged to participate in feature request discussions by adding comments or voting for particular ideas.

To comment on an idea:

1. Click the title of the idea.
2. Type a comment and click **Post Comment**.

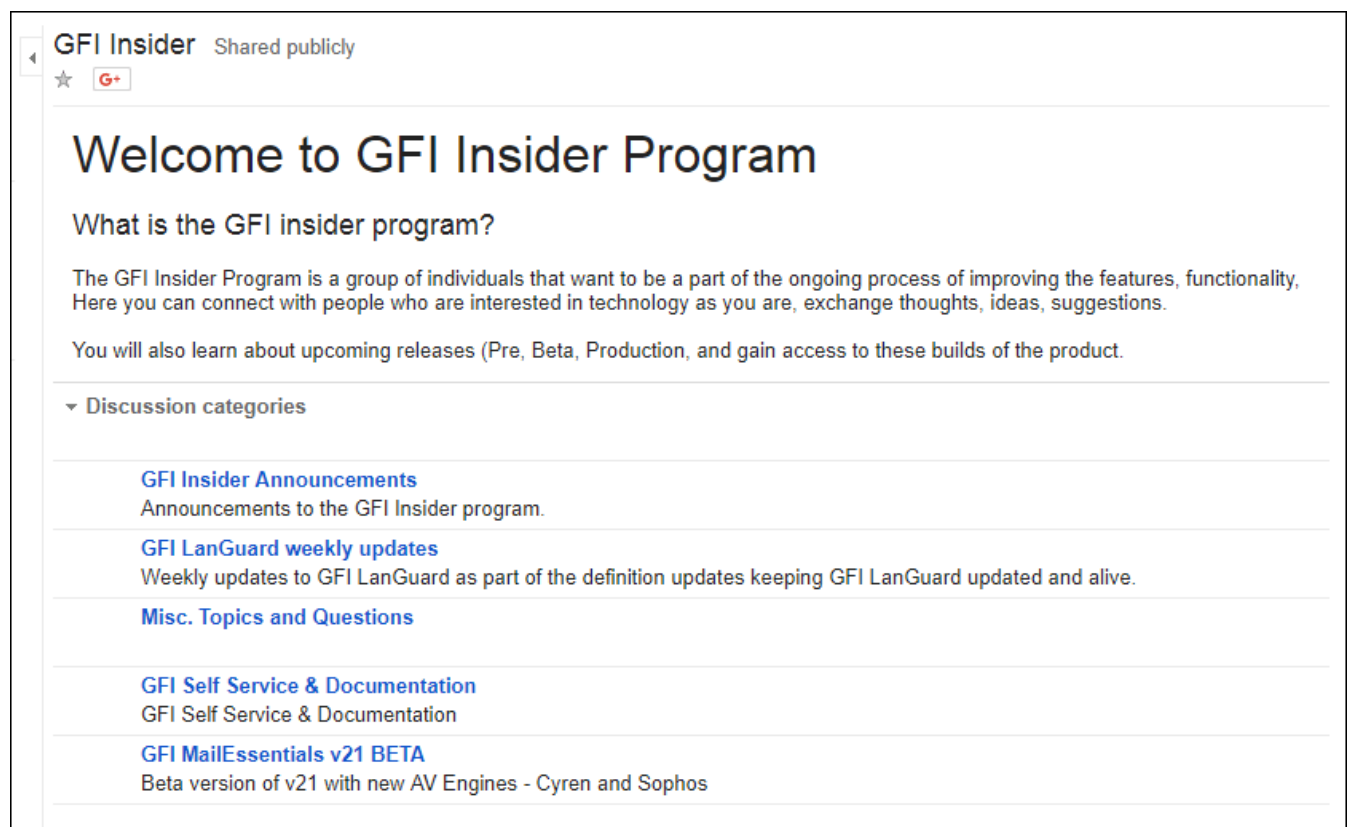
Furthermore, the following actions are available:

Action	Description
Vote	Click Vote to vote for an idea. The more votes a feature gets, the more the product management team can perceive that this idea is something important to the GFI community.
Share on Tweet	Click the Tweet icon to share the idea on Tweet. The message says, <i>I support '<title of the idea>' - what do you think?</i> followed by an link to the idea in the Feedback Portal.
Flag as inappropriate	Use this option to flag any content that is out of place and does not belong in the forum.

5.9 Insider Program

The GFI Insider Program is a like-minded group of individuals that want to be a part of the ongoing process of improving the features, functionality, and value of GFI Products.

Through the GFI Insider portal, you can connect with people who share a passion for technology and enjoy the mutually beneficial exchange of thoughts, ideas, and suggestions. Insiders get previews and first looks at upcoming GFI product releases and gain access to the latest product builds. They also participate in real-time roadmap discussions with engineering and product management teams.



Screenshot 29: Insider Program interface

The Insider group works following the same structure of any Google group. Once you join the group, you receive an email when new posts are added, and you can reply to any post.

To access the Insider Program:

1. [Login](#) to GFI Partners Portal.
2. Go to **Product Resources > Become an insider**.
3. Click **Become an Insider**.
4. Click **Join group to post**.
5. Select a theme from the **discussion categories** to see the posts.

6 Support

GFI Partners and customers can use the GFI Accounts Portal to contact the GFI Support department. The portal also offers a central location you can use to monitor the statuses of your open support cases.

Topics in this section:

6.1 Opening a support case	54
6.2 Managing open support cases	56
6.3 Starting a chat session with a support representative	58

6.1 Opening a support case

If you are experiencing issues with your GFI product, you can open and manage a support case in the GFI Accounts Portal .

For more information, refer to [Managing open support cases](#) (page 56).

NOTE

To avoid delays, make sure to provide your license key or account number with your support request.

Before you open a new case

- » Research the online help and knowledge base for information about known issues and similar problems. See <https://www.gfi.com/support>
- » Ensure you are using the latest build available for your product. New releases have hotfixes and improvements that may solve your issue.
- » For issues related to upgrades, consult the GFI Upgrade Center. See <https://upgrade.gfi.com/>

Contacting support via phone

To access the telephone number for support navigate to **Support** tab and expand **Additional details**.

Opening a new case

To open a new case with support:

1. [Login](#) to the GFI Accounts Portal.
2. Go to **Support** and click **Contact Support**.
3. Click **Log a Case**.

Joe Doe

Home

Open Cases

Closed Cases

Knowledge

Log a Case

Back

EMAIL CUSTOMER SUPPORT

Contact Name
Joe Doe

Web Email

COUNTRY *

Customer ID

GFI PRODUCT *

VERSION

SUBJECT *

SEVERITY LEVEL *

INSTALLED OPERATING SYSTEM

DESCRIPTION *

Add Attachment

SUBMIT

Screenshot 30: Support request form

- The form loads your contact details automatically. Check if they are correct. To make changes you need to edit your account details. For more information, refer to [Editing your company information](#) (page 8).
- Fill in the following fields:

Field	Description
GFI Product	Select your GFI product from the list.

Field	Description
Subject	Enter a subject that summarizes the problem. The description should be short yet complete.
Security Level	Select the option that better describe the impact of the problem on your business: 1- Production System Down. Problem is affecting the core business. 2- Restricted Operations. Problem is affecting certain areas related to the business operations. 3- System Performance. Problem is slowing down certain business operations. 4- Questions/inconvenience. Problem is causing some inconveniences to business or some questions need to be answered.
Description	Give a detailed account of your problem. Try to answer the following questions: » What is the main issue? » When did the problem start? » Any changes in the environment around the time the problem started? Software or hardware updates, installation of third-parties software, etc. » Any step already tried to solve the problem? » What are the steps to reproduce the problem?
Web phone	Your main telephone contact number
Country	Select a country from the list. This information is useful to assign your case to technicians that work on your same time zone.
License key	Enter the license key of the GFI product. It is important that your support request form contains either the license key on your account number to verify the validity of your SMA.
Version	Version of GFI Product installed.
Build	Build number of GFI Product installed.
Installed Operating System	Operating System in which the GFI Product is installed.
Add attachment	Click the link to attach screenshots or a set of log files collected.

6. Click **Submit**.

6.2 Managing open support cases

Proactive case management can shorten the time it takes to get a case solved. To facilitate case management, the GFI Accounts Portal provides customers with a support area, showing their open cases, subjects, status, and severity level.

NOTE

Cases are automatically closed if there is no reply from the client within ninety-six hours (four days).

Tips for good case management

- » Monitor the support area frequently to avoid delays in cases waiting for customer feedback.
- » Read attentively the suggestions given by the support agent and follow their instructions.
- » If the suggestion did not work, reply back with an exact description of the steps followed and the results obtained.

Managing open cases

To start managing your cases:

1. [Login](#) to the GFI Accounts Portal.
2. Click **Get support** and click **Contact Support**.

MY OPEN CASES						
Case Number	Contact Name	Subject	Status	Severity Level	Date/Time Opened	
GFI-170728-498851		Emails are not archiving	Investigating	No Selection	7/28/2017 8:08 AM	
GFI-170728-498852		Spam is not being filtered.	Investigating	No Selection	7/28/2017 8:09 AM	
GFI-170728-498853		Non-Security Patches are not be...	Investigating	No Selection	7/28/2017 8:13 AM	

Page 1 of 1

Screenshot 31: List of open cases

3. Click on the case number to see the status of your case.

Non-Security Patches are not being deployed.

No Selection • Awaiting Customer Information • GFI-170728-498853

Support • Jul 28, 2017

Hi Joe Doe,

Thanks for your support request.
Could you follow the article attached and provide a set of troubleshooter files.
Thanks and Regards

GFI Support

Write a new comment...

Comment

Close Case

CASE DETAILS

Case Information

Case Number	Status
GFI-170728-498853	Awaiting Customer Information
Case Owner	Severity Level
	No Selection
Case Origin	Language
portal	English

View All

No attachments.

Screenshot 32: Details of an open case

4. On the left pane, you can see the case comments. Follow the steps suggested and reply with the results. When requested, attach screenshots, log files or any other attachments.
5. Click **Comment**.

Case details

On the right pane you can see your case information:

Entries	Description
Case Number	Number associated with the case. Quote this number when requesting information about the case.
Status	Displays the status of the case. These options are available: <ul style="list-style-type: none"> » Investigating - support agent is revising the case. » Waiting customer information - support is waiting for clients' reply. » Pending archival - the case is about to be archived if there is no response within twenty-four hours.

Entries	Description
Case Owner	Main contact from your company to receive updates about the case. Request support to change it in cases of a transference of ownership to another person.
Severity level	Internal information about the severity and priority of the case. This information is filled by the agent handling your case. New cases have No Selection as default.
Case Origin	If the case was originally logged as a phone call, a chat session or via the GFI Accounts Portal.
Language	Language used to reply to the case. By default all cases are handled in English. If necessary you can request support in another language. The languages available for support are: <ul style="list-style-type: none"> » German » Italian » French » Spanish » Czech

Once the case has been solved, you can click **Close Case**.

6.3 Starting a chat session with a support representative

Real-time chat is available if you have a simple issue, a general question or if you'd like to follow up on an existing support case. Chat is only available to customers with a valid SMA.

If you have a complex question or issue, chat may not be the best initial solution. Often, support cases are solved more quickly and efficiently by starting a support case, using the support form or by calling support directly. For more information, refer to [Opening a support case](#) (page 54).

Before you start a chat

- » Have your client ID at hand. Access the profile of your account in the GFI Accounts Portal to retrieve the CustomerID number. The session cannot be started if that information is missing.
- » Prepare a case subject that summarizes the problem. The description should be short yet complete.
- » Prepare a brief description of the problem. Try to answer the following questions:
 - What is the main issue?
 - When did the problem start?
 - Any changes in the environment around the time the problem started? Software or hardware updates, installation of third-parties, etc
 - Any steps already tried to solve the problem?
 - What steps do you take to reproduce the problem?

Starting the chat session

To start a new chat session:

1. [Login](#) to the GFI Accounts Portal.
2. Click **Get support** and click **Chat**.

GFI Software | Support Chat - Google Chrome

Secure | <https://gfisecure.force.com/voiceofthecustomer2/apex/tsChat?>

Support Chat

Would you like to chat regarding a new or existing case?

☒ New
☐ Existing

Please fill in the following details

Product: Archiver

First Name:

Last Name:

Email:

Customer ID:

Case Subject:

Screenshot 33: Starting a new chat

3. Select if you would like to chat regarding a new or existing case:

Option	Description
New	Select this option if you do not have a open case and provide the following information: <ul style="list-style-type: none"> » Product that you need support with » First Name » Last Name » Email » Customer ID » Case Subject
Existing	Select this option if you already have a support ticket open and enter the case number.

4. Click **Chat**.

5. While waiting for an available support agent, the following message is displayed on the screen **Please hold while we connect you to an agent**.

6. Once an agent is available to take your call, the chat session starts.

GFI Software | Support Chat - Google Chrome

Secure | <https://12a3s.la1-c1-phx.salesforceliveagent.com/content/s/cha?>

Support

Hello Joe Doe and thank you for your patience. How may I help you today?

11:16:23 AM

Write a message...

Screenshot 34: Chat session started

7. Reply to the greeting and click **Send**.
8. Click **Save Chat** to save the content of the chat in a text file. A file named **transcript.txt** is saved in your default download location.
9. Click **End Chat** to close the session.

7 Other resources

If you have not found what you are looking for or if you have any comments, do not hesitate to get in touch with us. All comments are valued and inquiries are treated with the strictest confidence.

In this page you also find links to important information:

Websites

GFI Forum: <http://forums.gfi.com>

Kerio Forum: <http://forums.kerio.com/>

Support: <https://accounts.gfi.com/Support>

Knowledge Base: <https://www.gfi.com/support/>

Email contacts

To contact sales: sales@gfi.com

Feedback on this help: documentation@gfi.com