A Partner's Guide to ezeep

The following guide is for managed service providers and ezeep partners. It explains how you can create accounts on your customers' behalf.

Following the steps in this guide will also ensure:
› that your organization is billed for the account and your partner discount is applied.
› that all customer accounts and data remain separate from each account.
› that you have central admin access to all your customers.

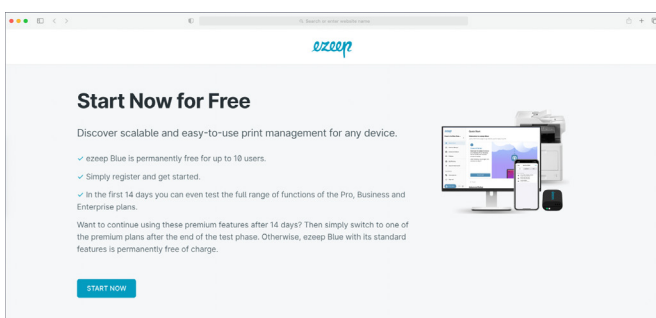## Step 1) Create your partner management account

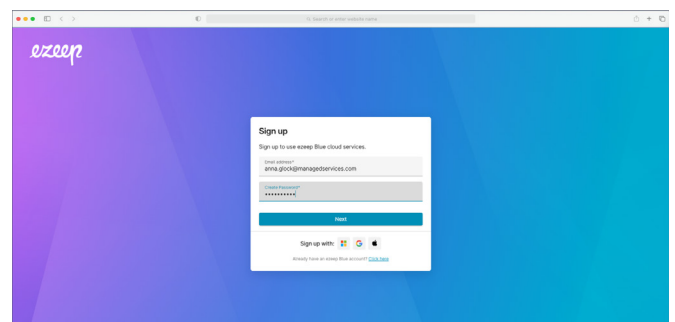**Image 1:** *Sign up to ezeep Blue at www.ezeep.com/free-trial.*

Image 2: *Choose your email address and password for the management account.*

Visit the ezeep homepage and create a new account. Be sure to use an email address which can be used to create all subsequent customer accounts. We recommend that you use a generic email like ezeep@acme-partner.com instead of a personal email.
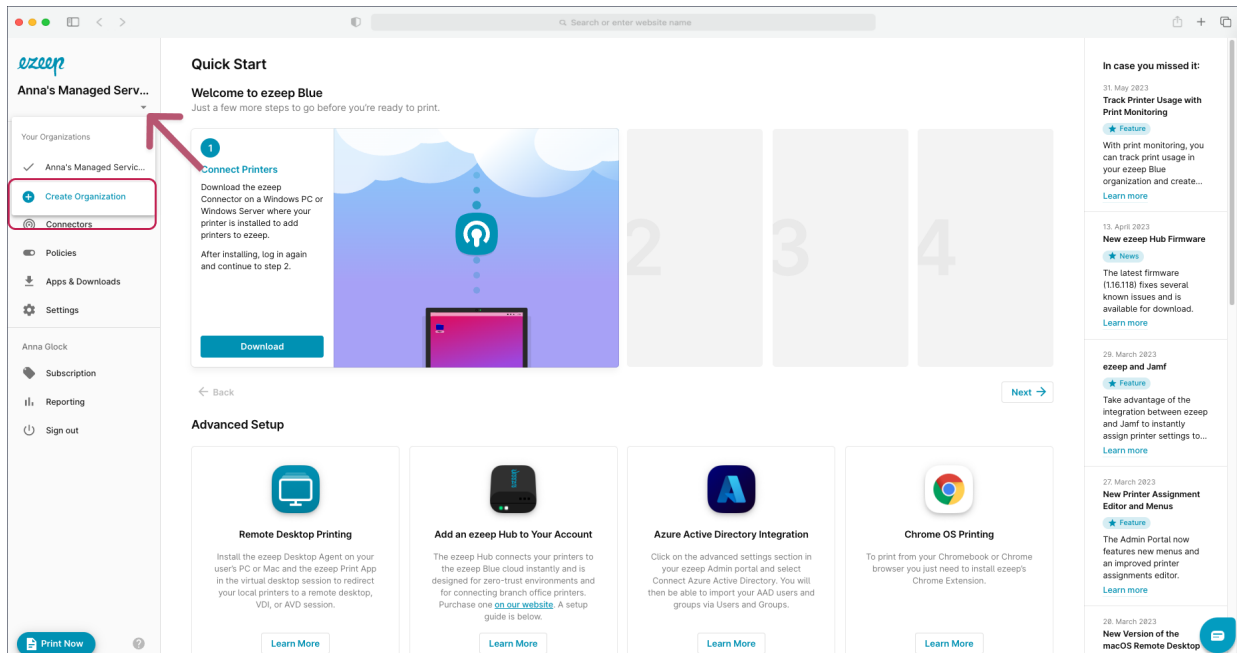
Step 2) Add a new ezeep Blue organization

Image 3: *Adding another organization to your account*

In the ezeep Blue Admin Portal, click on the small downwards-facing arrow next to your organization's name. Select "Create Organization" and provide your client's organization details. To receive the invoice for your customer's account in your own name, you can change the billing address later in the Subscription menu.

IMPORTANT: Important for partners who are creating the organization for their customers for the first time. Before inviting your customers to the organization, please always create yourself as an admin first.

Once created, you can switch customer accounts without signing into each account, and you can also rename customer accounts if needed in the Settings menu.

Step 3) Subscribe your customer's account to ezeep Blue

Each account will start with a 14-day feature trial to give you time to set up ezeep Blue according to your customer's requirements. Select the plan best suited to your customer's needs in the Subscription menu while logged in to your customer's account.

IMPORTANT: You will be asked for a discount coupon code during each subscription sign-up process. Be sure to enter your ezeep partner coupon code here to apply your partner discount to each invoice.
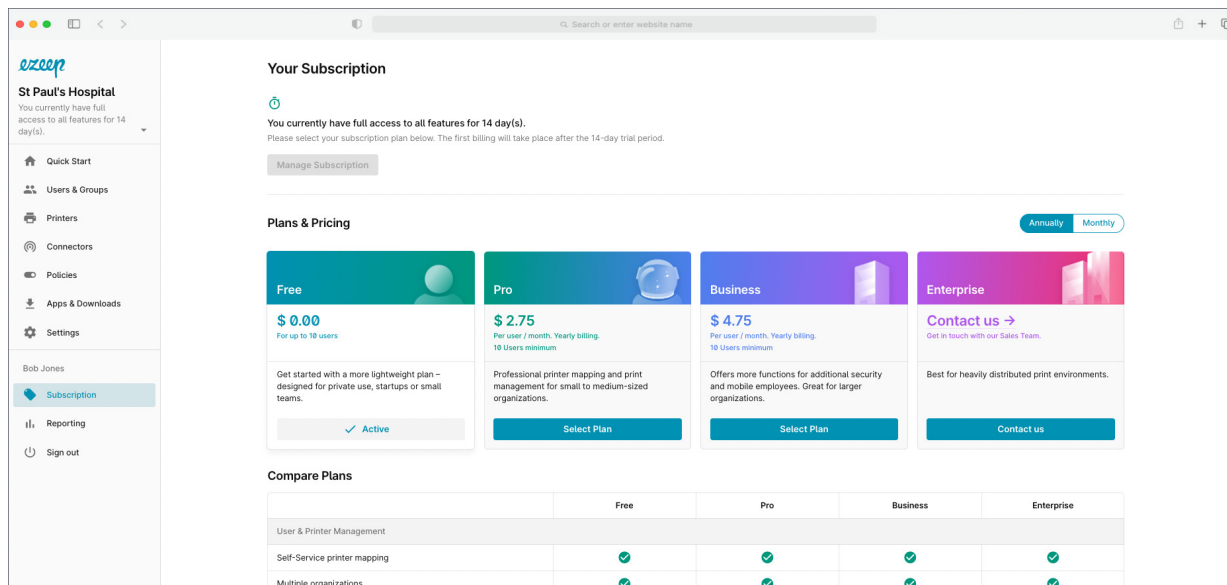
Image 4: Click on Subscriptions to manage the account and change the plan.
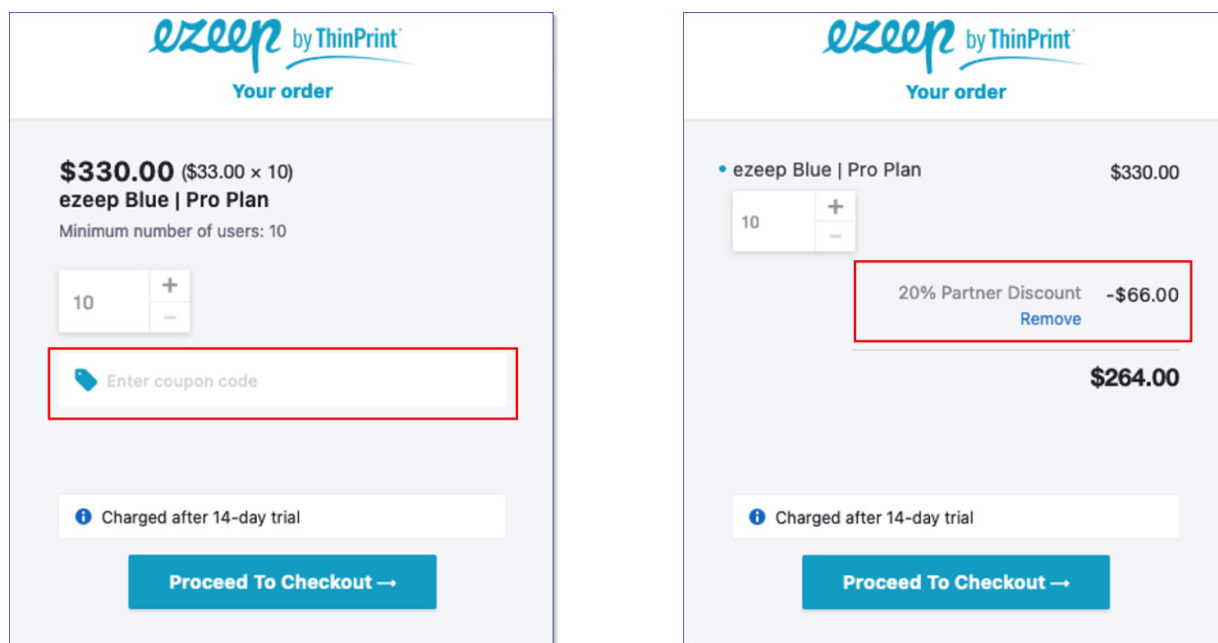

Image 5: Add your ezeep partner coupon code. The discount will appear in the window.

If you do not have an ezeep partner coupon code or have forgotten it, please contact your local ezeep Channel Manager.

We recommend that you do not give any of the customer's users the role of Admin in ezeep Blue, as any Admin will be able to view your billing information.