

# ACTIFILE QUICKSTART GUIDE FOR MSPs

## Quick Links:

1. 30 second introduction to Actifile with the CEO: <https://bit.ly/Actifile-30secs>
2. 60 second demo of Actifile: <https://bit.ly/Actifile-Encryption-OneMinuteDemo>
3. Link to login to your Actifile MSP account: <https://app.actifile.com/account/login>
4. Book a Live Demo: <https://bit.ly/Quick-Demo>
5. Create an MSP account and trial Actifile: <https://bit.ly/Actifile-Trial>

Discover just how easy it is to create a completely new revenue stream and different yourself from other MSPs, and add enormous value to your customers, **follow these 3 steps (13-15 minutes)**:

## Step 1 – Create your Actifile Account and create your 1<sup>st</sup> customer (about 4-minutes)

- a. Create your Actifile MSP account:  
<https://app.actifile.com/Account/SignUpPartner?partnerkey=BV4X-C9CC-IICW-OWV8>
- b. You will be requested to verify the email address used (it must be unique and never before used in the Actifile system).
- c. If the confirmation email doesn't arrive in a few minutes, click **[RESEND]** and check JUNK MAIL please.
- d. Logon to your account
  - a. [Actifile](https://app.actifile.com/account/login/) (<https://app.actifile.com/account/login/>)
  - b. Username [your email address]
  - c. Password [You just created]
- e. Click **[CUSTOMERS]**, then **[ADD CUSTOMER]**, then create your 1<sup>st</sup> customer - **watch a [2-minute video](#) MSP deployment and a [1-minute](#) end user deployment video** – we suggest the following:
  - a. Customer name: **[INTERNAL - MSP NAME]**, include First Name, Last Name.
  - b. Click **[Set customer login** (if disabled, your customers will not have access. Access is only via the partner through the partner portal)].
    - i. This will allow the customer to manage their own environment if you want them to have access to their environment.
  - c. Enter **[EMAIL]** and **[PASSWORD]** – NOTE: no emails will be sent to this email address; it is to verify that it is unique.
  - d. Primary Regulation Country Select **[AUSTRALIA]**
  - e. Turn **[ON or OFF]** each Compliance Profile as required – typically change CMMC and IT to **[ON]**
  - f. Save Changes.
  - g. Congratulations you have created your 1<sup>st</sup> customer (**INTERNAL MSP**).

## Step 2 – Download & Install the Actifile Agent on to your device (about 4-minutes).

- f. Click on Customer Name [**INTERNAL MSP**], it will be blank until you deploy your 1<sup>st</sup> agent.
  - a. TOP tab – 4<sup>th</sup> along [**DEPLOYMENT**].
  - b. **CRITICAL**: this will be the unique key for **all endpoints at this customer**. Every new [**Customer Name**] **MUST have a unique key**, or it become unmanageable if the same key is used across multiple customers.
  - c. At the bottom of page, follow the [**Click Here**] links to learn more about **Downloads, Installation Guide** and **Important AV/EDR information** (set up exclusions in your AV product – you will probably need to put 3 .exe in your AV/EDR allow list:
    - i. **AFAgentService.exe**  
**AFUdaterService.exe**  
**AFAgentServiceManager.exe**

### Step 2

Exclude the folder + sub folders from scanning:

**C:\Program Files (x86)\Actifile Agent**

**Step 3** (optional – for Intrusion Prevention Systems – IPS):

URLs for whitelisting (all HTTPS port 443):

**<https://app.actifile.com>**

**<https://actifileapp1.azurewebsites.net>**

- d. Click [**DOWNLOAD FOR WINDOWS**] to install to your device.
  - i. No reboot is required.
  - ii. Within about 15 minutes data will start appearing in the [**INTERNAL CUSTOMER**] portal. Normally a full audit has been completed with 6 or so hours.
  - iii. From now on, it is all automated and all private, sensitive, and regulated data is being monitored and tracked in real-time.
  - iv. **Note**: When deploying to multiple machines, the “path” must be the FQDN to the installer package accessible from the installed machine.
- g. While waiting for the audit to populate with your data, let’s do a quick walk through of some of the capabilities of Actifile.
- h. Click top left [**ACTIFILE LOGO**], **TOP** Horizontal Tab, click [**PARTNER PORTAL**], Click 2<sup>nd</sup> from the bottom **LEFT** Vertical tab [**SUPPORT**], create a new Login – this is the best way to ask technical questions to the Actifile team. Note: *this needs to be a different email address than the Actifile Account created.*
- i. Go back to your original browser tab (clicking Support will automatically open a new tab), **LEFT** Vertical Tab, click [**KNOWLEDGEBASE**]
  - a. Explore the Actifile Knowledgebase, some examples of searches include:
  - b. Search [**Channels**] – these are essentially pre-designed ‘rules’ that you can implement as you become more experienced with Actifile – scroll down the list.
  - c. Search [**SharePoint, OneDrive, or NAS**] – additional chargeable option per TB per month
  - d. Search [**Agent Deployment**]

- j. Click TOP Left Vertical Tab [**Actifile logo**], then **LEFT** Vertical Tab (8<sup>th</sup> down) [**PARTNER SETTINGS**], then Turn [**ON**] 2 Step Verification, then upload your logo (Actifile is currently a co-branded solution)

**Step 3 – Discover your private, sensitive, and regulated data.** (About 5 minutes) Watch a [4-minute demo](#) of Actifile.

- k. By now, the audit should be producing some results, so let's look at the results.
- l. Click TOP Left Vertical Tab [**Actifile logo**], then [**CUSTOMER**], then [**INTERNAL MSP**], the Dashboard will now show how many devices are connected and the total **Data Risk Value**.
  - a. TOP Left Vertical Tab [**DATA RISK**], all the different classifications will start appearing here, and immediately you can see what you have.
    - i. By Classification, Quantify how many files and records, Risk value, Encryption (should be \$0)
    - ii. We will explain the [**PADLOCKS**] in Stage 6 – Encryption
    - iii. [**APPLICATION RISK**] – over time, this will track the flow of all data inbound and outbound to this customer. You are able to change the date range and [**DETECTED**] and [**TRUSTED**] – this is for advanced users and when you turn on encryption and start using Channels / Rules.
    - iv. On the **LEFT** Vertical Tab, Click [**MAP**], then [**EVENT AUDIT**], and keep clicking the options to drill further into the data analysis.
- m. Top LEFT Vertical tab, click [**DEVICE**], This will give you a view by individual device – click the links and explore.
- n. Top LEFT Vertical tab, click [**ACTIVITY LOG**], click the options and explore.
- o. **Understanding the BASICS of Encryption - we will work with you BEFORE you start encrypting your or your customers data – (About 1-minute). Watch a [2.4-minute video](#) on Actifile Encryption**
- p. Encryption is very simple, to get a quick understanding – follow these steps [**DO NOT CLICK SAVE**]
- q. Click Top Left [**Actifile logo**], LEFT Vertical Tab [**DATA RISK**], Click the [**RED PADLOCK**], Click Encryption Status [**ON**], Select [**91**] days, Explore Channels dropdown – we will explain this in a later training course. If you click [**SAVE CHANGES**] – all files of that Classification will automatically become encrypted 91 days after the last access date, so if that data is stolen, it is useless to a hacker.
  - a. Internal users can automatically decrypt the encrypted files by a simple double click of the encrypted file = zero friction to users
  - b. You can also set up Allow listing of Applications to automatically decrypt encrypted files using Channels.
- r. **DO NOT CLICK SAVE UNTIL YOU ARE READY AND UNDERSTAND THE ENCRYPTION PROCESS IN DETAIL – but it is that simple.**

Note: you will have different options depending on if you are in the 'Global' view or the individual 'customer' view

If you have any questions, first look at the Knowledgebase, then create a ticket for the Actifile support team [Actifile Support Site | Data Privacy and Security](#). You will need to create a support login – this must be different from any other emails used (so perhaps [support@YOURMSP.com.au](mailto:support@YOURMSP.com.au) or [Tickets@YOURMSP.com.au](mailto:Tickets@YOURMSP.com.au) – or any email that your technical team monitor. Normal response is typically about 12-24 hours due to time differences. Also, please feel free to send me a text to my mobile and I will see if I can help you!

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Enjoy, and let's have a chat once you have downloaded and started to test Actifile.

I have set you up with a **15-day trial key**, that we can **convert into an NFR key** once you are happy with Actifile.

**Please email me the email address that you used to create your Actifile account so I can ensure we process the special promotion pricing for you.**

**BOOK A DEMO OF ACTIFILE: [www.](http://www.actifile.com)**