



# End User Training

Customer name

Date

# Agenda

Why Dropbox?

---

User Onboarding Flows

---

Account Setup

---

Sharing

---

Collaboration

---

Groups

---

Folder Structure

---

Common Scenarios

---

Questions

---



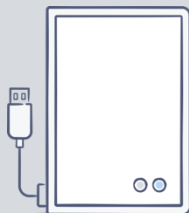
## The Old Way



In-person



Size



Hard drives



Internal-only

Bound by tools

## The New Way



- Anytime, anywhere access to your files
- As much space as you need
- Unlimited version history and deletion recovery
- Easily collaborate on files and folders - both internally and externally
- <https://www.dropbox.com/help/3>



# Account Set Up



## 2 Main User Onboarding Flows

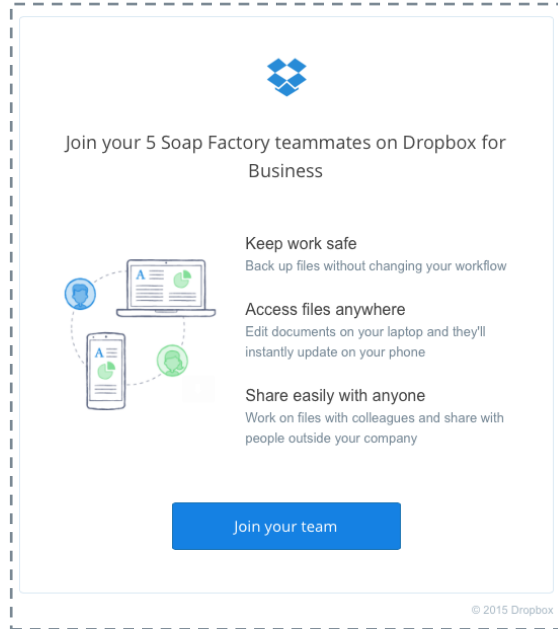
- New User
- Existing Personal User

## Steps to Join the Account

- Accept the invitation to join
- Log in with SSO
- (Existing Basic / Pro Users only) - choose what to do with the data in your account
- Download Dropbox Desktop client

# Account Set Up

## Email Invitation – All Users



The screenshot shows a Dropbox Business invitation email. At the top is the Dropbox logo. Below it, the text reads: "Join your 5 Soap Factory teammates on Dropbox for Business". To the left of the main text is an illustration showing a laptop, a smartphone, and a person's head, connected by dashed lines, representing multi-device access and sharing. The main text lists three benefits: "Keep work safe" (Back up files without changing your workflow), "Access files anywhere" (Edit documents on your laptop and they'll instantly update on your phone), and "Share easily with anyone" (Work on files with colleagues and share with people outside your company). At the bottom is a blue button that says "Join your team". In the bottom right corner, there is a small copyright notice: "© 2015 Dropbox".

Join your 5 Soap Factory teammates on Dropbox for Business

**Keep work safe**  
Back up files without changing your workflow

**Access files anywhere**  
Edit documents on your laptop and they'll instantly update on your phone

**Share easily with anyone**  
Work on files with colleagues and share with people outside your company

Join your team

© 2015 Dropbox

1. New User

2. Existing User



New Users

# New User

1



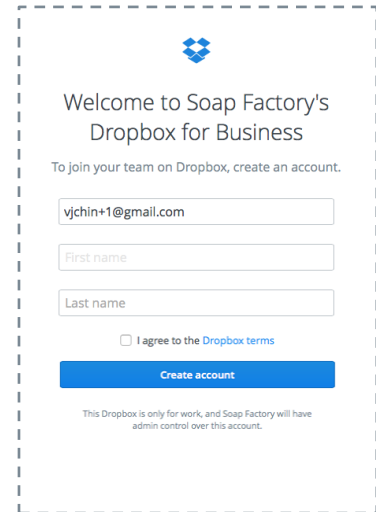
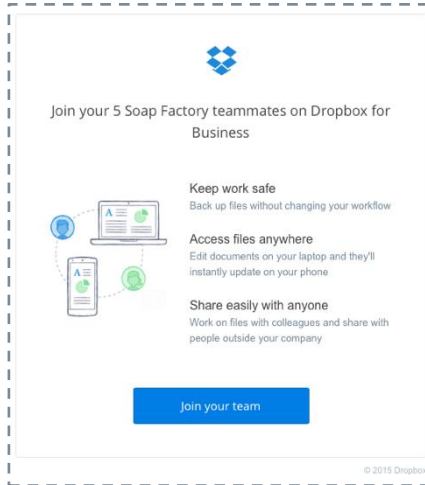
2



3


IT Administrator

Invites user to  
become a  
member of the  
Dropbox account



# Account Set Up

New User




Welcome to Soap Factory's  
Dropbox for Business

To join your team on Dropbox, create an account.

  
  
  
 I agree to the [Dropbox terms](#)

**Create account**

This Dropbox is only for work, and Soap Factory will have admin control over this account.



**Success!**  
Now download Dropbox for desktop

Dropbox for desktop automatically backs up your files and makes them easy to share. Download the app to get started.

**Download Dropbox for desktop**

or [go to Dropbox on the web](#)



Existing Personal Users

# Existing Personal User

1



2



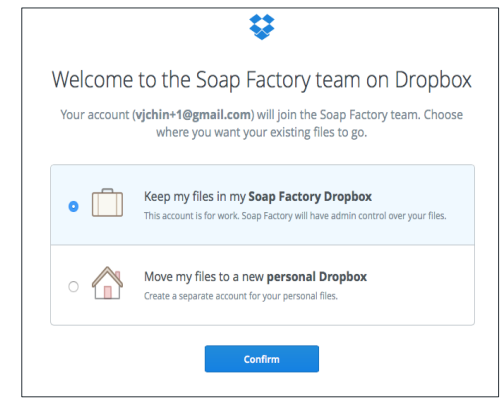
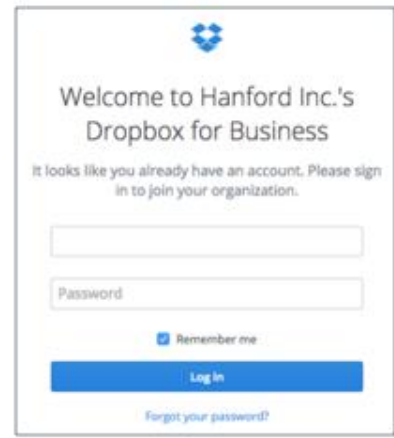
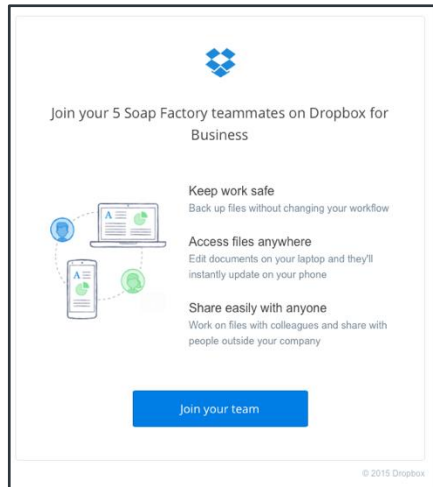
3



4

IT Administrator

Invites user to become a member of the Dropbox account



# Account Set Up

Existing Basic / Pro User

Work



Welcome to the Soap Factory team on Dropbox

Your account (**vjchin+1@gmail.com**) will join the Soap Factory team. Choose where you want your existing files to go.



Keep my files in my **Soap Factory Dropbox**

This account is for work. Soap Factory will have admin control over your files.



Move my files to a new **personal Dropbox**

Create a separate account for your personal files.

Confirm

Personal



Welcome to the Soap Factory team on Dropbox

Your account (**vjchin+1@gmail.com**) will join the Soap Factory team. Choose where you want your existing files to go.



Keep my files in my **Soap Factory Dropbox**

This account is for work. Soap Factory will have admin control over your files.



Move my files to a new **personal Dropbox**

Create a separate account for your personal files.

Enter a different email address to create a new personal account. The email **vjchin+1@gmail.com** will be used for your Soap Factory Dropbox account.

New email

New Password

I agree to the [Dropbox terms](#)

Confirm



“I was using Dropbox for **work** stuff”



Dropbox account  
with [company  
name] email for  
**work** files



New [company name]  
**Enterprise** account  
with all your work files





Work



Welcome to the Soap Factory team on Dropbox

Your account (**vjchin+1@gmail.com**) will join the Soap Factory team. Choose where you want your existing files to go.

-  **Keep my files in my Soap Factory Dropbox**  
This account is for work. Soap Factory will have admin control over your files.
-  **Move my files to a new personal Dropbox**  
Create a separate account for your personal files.

Confirm

Personal



Welcome to the Soap Factory team on Dropbox

Your account (**vjchin+1@gmail.com**) will join the Soap Factory team. Choose where you want your existing files to go.



Keep my files in my **Soap Factory Dropbox**

This account is for work. Soap Factory will have admin control over your files.



Move my files to a new **personal Dropbox**

Create a separate account for your personal files.

Enter a different email address to create a new personal account. The email **vjchin+1@gmail.com** will be used for your Soap Factory Dropbox account.

I agree to the [Dropbox terms](#)

Confirm



"I was using Dropbox for my **personal** files"



Dropbox account with [company name] email for **personal use**



New [company name] **Enterprise** account

New **personal** account with all your files

**Account  
Setup  
(Desktop  
Client)**

**Existing  
Personal  
User**



**Success!**



**Success!**

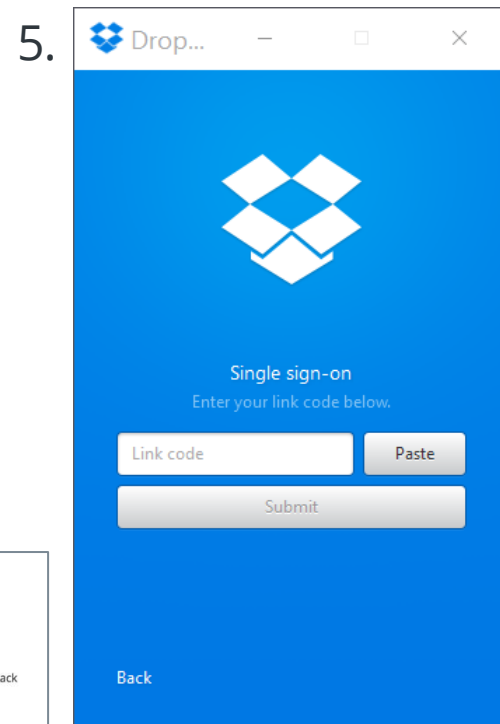
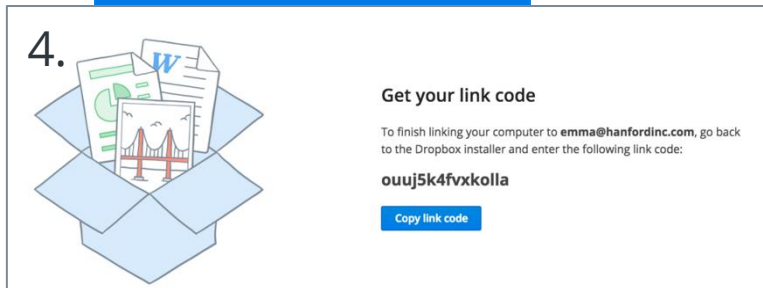
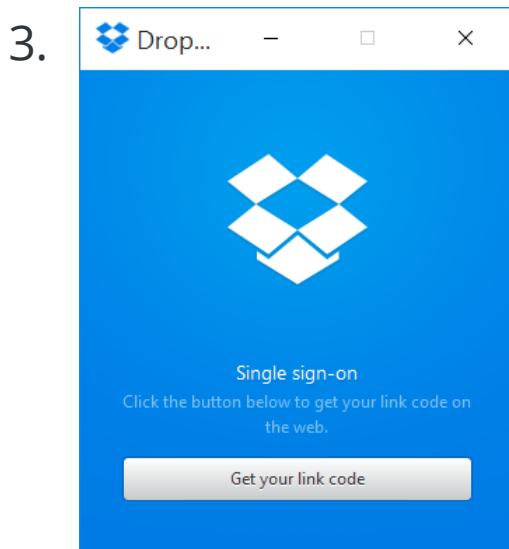
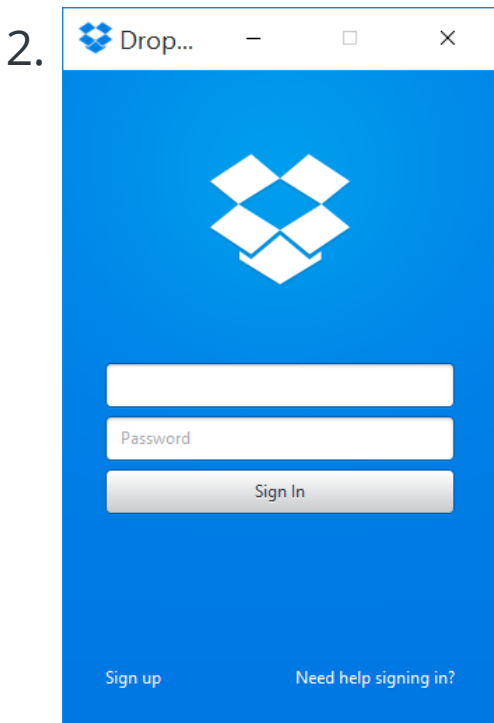
Now download Dropbox for desktop

Dropbox for desktop automatically backs up your files and makes them easy to share. Download the app to get started.

[Download Dropbox for desktop](#)


or go to [Dropbox on the web](#)

# Installing Desktop Application with SSO





# Connecting a Personal Dropbox

Web



1. 

Dropbox

Name ▾

-  Personal
-  Hanford Inc.

---


-  Team
-  Paper

ABC Corp

Archive

Web

2. Connect your **personal** Dropbox



You can also keep a personal Dropbox on each of your computers. Create a separate personal Dropbox to store files and photos, and share with friends and family. This Dropbox belongs to you, not Hanford Inc. **will not** have administrative control over it.


If you already have a personal Dropbox, [sign in.](#)

I agree to the [Dropbox Terms](#)

[Create personal Dropbox](#)

[No, thanks. I'll do this later.](#)

Desktop client

3.  **Link your personal Dropbox!**  
Add a personal Dropbox to this computer

[Link](#) [Not now](#)

# Upload & Sync

- Features overview
- Desktop application upload and sync
- Website upload and sync
- Saving to Dropbox
- Selective sync

# Sharing

- Shared Folders
- Shared Links
- Authenticated Sharing
- File Requests
- Permissions

# Basic Sharing and Collaboration on Dropbox

## Shared Links

- One Directional Communication – Recipients can ‘view’ and download
- Link updates with latest version, however local download will be static
- Don’t need a Dropbox account to view!



## Shared Folders

- 2 Directional Collaboration and Communication – share, review, and edit files with others
- Files always in sync across members of shared folder
- Need a Dropbox Account to collaborate



## Authenticated Sharing

- One Directional Communication – Recipients can ‘view’ and download
- Authenticated sharing at the file level, only viewers named by the owner have access
- Need a Dropbox account to view or request access!



## File Requests

- Use case: Replace FTP and request files from anyone, even if they don’t have a Dropbox account
- Don’t need a Dropbox Account to upload!

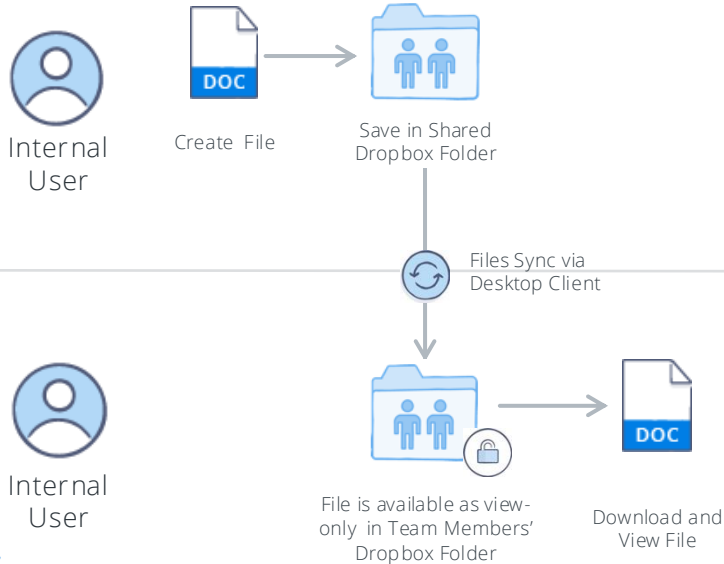


# One-Way Internal Collaboration

Leverage Dropbox to securely share content unidirectional

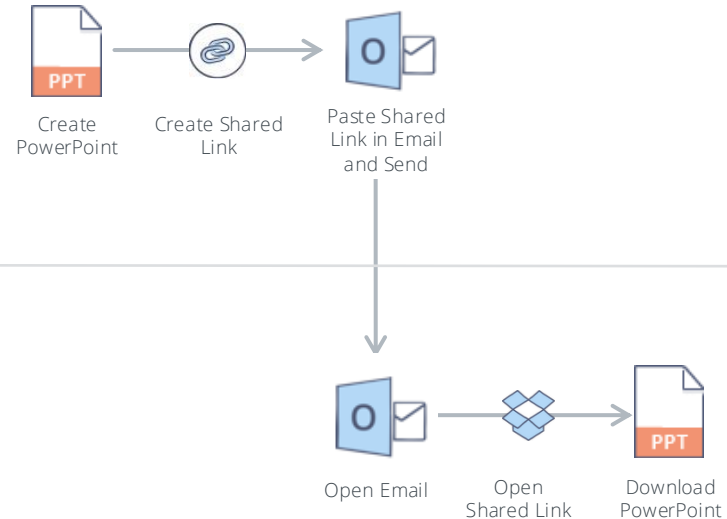
## Read-only Shared Folders

*Both users have a Dropbox Account*



## Shared Links

*Only the sender needs a Dropbox Account*



# One-Way External Collaboration

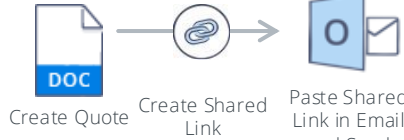
Leverage Dropbox to securely share content unidirectional

## Shared Links

*Only the sender needs a Dropbox Account*



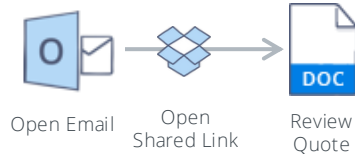
Internal User



Paste Shared Link in Email and Send

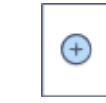


External User



## File Requests

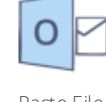
*Only the requester needs a Dropbox Account*



Create File Request for Bids



File Request Generates Link



Paste File Request Link in Email and Send



Open designated File Request Folder



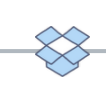
Review Bid



Upload Bid



Open Email



Open Shared Link



Create Bid

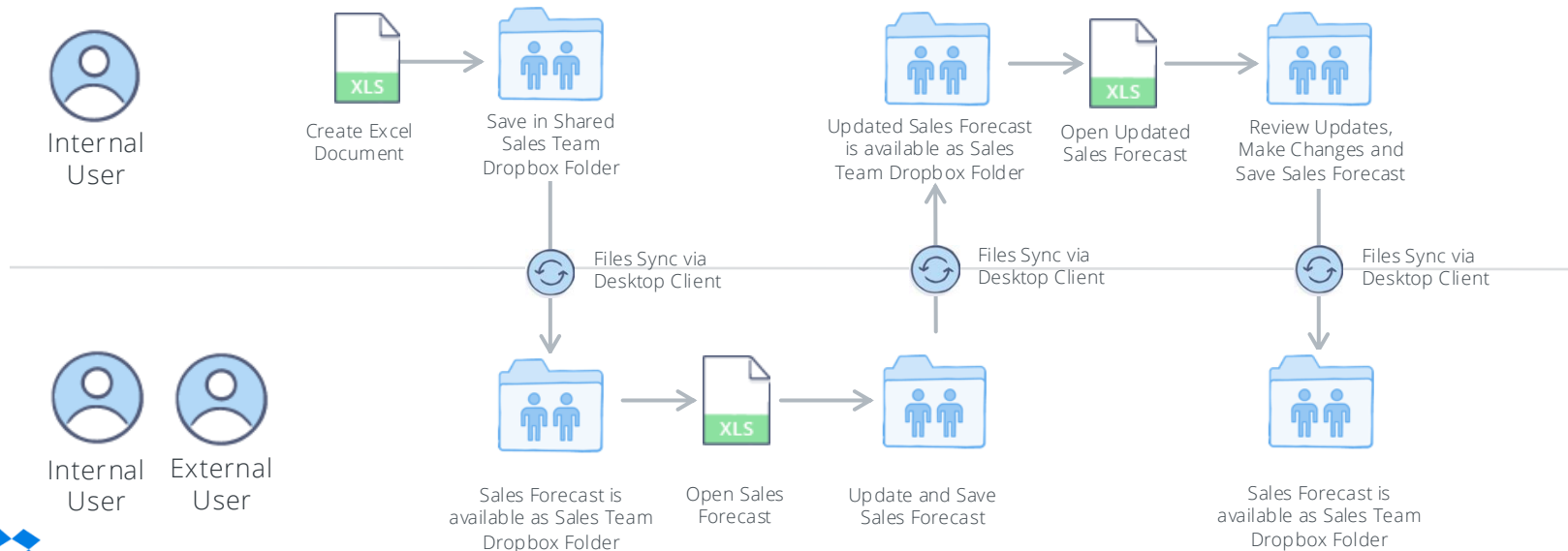


# Multi-directional Collaboration

Leverage Dropbox as a Shared Collaboration Space to add, edit, and delete documents

## Shared Folders

*Both users have a Dropbox Account*



## Collaboration



- Commenting
- Badge – Live Collaboration with Microsoft Office Files
- Version History
- Deletion Recovery



# Advanced Sharing and Collaboration on Dropbox

## Dropbox Badge

- Know when other people are viewing and editing your Microsoft Office files stored in Dropbox
- Easily update to the latest version of your file whenever someone else makes a change



## Online Commenting

- Write comments on files directly in the Dropbox website
- Tag people to bring them into the conversation, even if they don't have a Dropbox account
- Resolve comments to indicate the review is complete



# Protecting your Data

## Unlimited Deletion Recovery

- Recover any deleted file with a few clicks
  - Undo mass deletion events via 'Deleted files'
  - Recover specific files or folders via the 'Trashcan' icon



## Unlimited Version History

- View version history from the website, the desktop folder, or the badge
- View all version of a file and select the one that you wish to restore
- Restore the desired version with a few mouse clicks

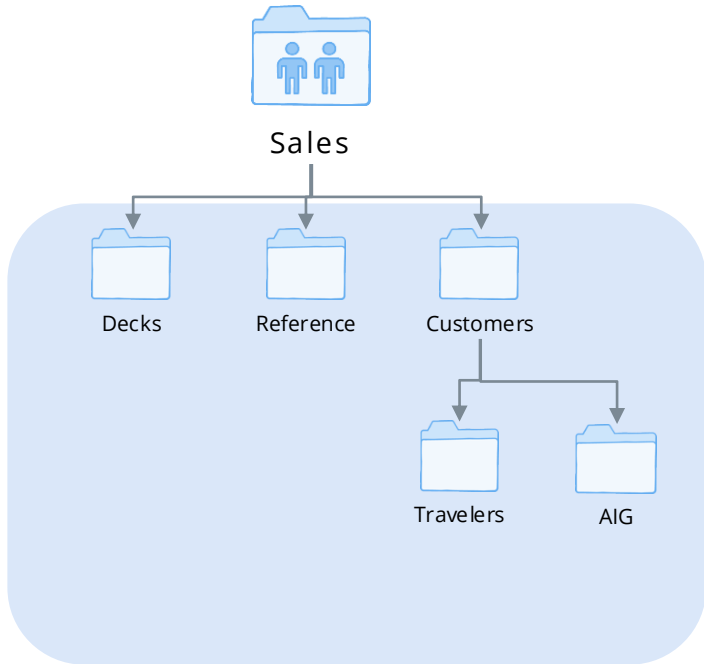


# Common Scenarios

- Renaming Shared Folders
- Folder Structure Best Practices

# Folder Naming

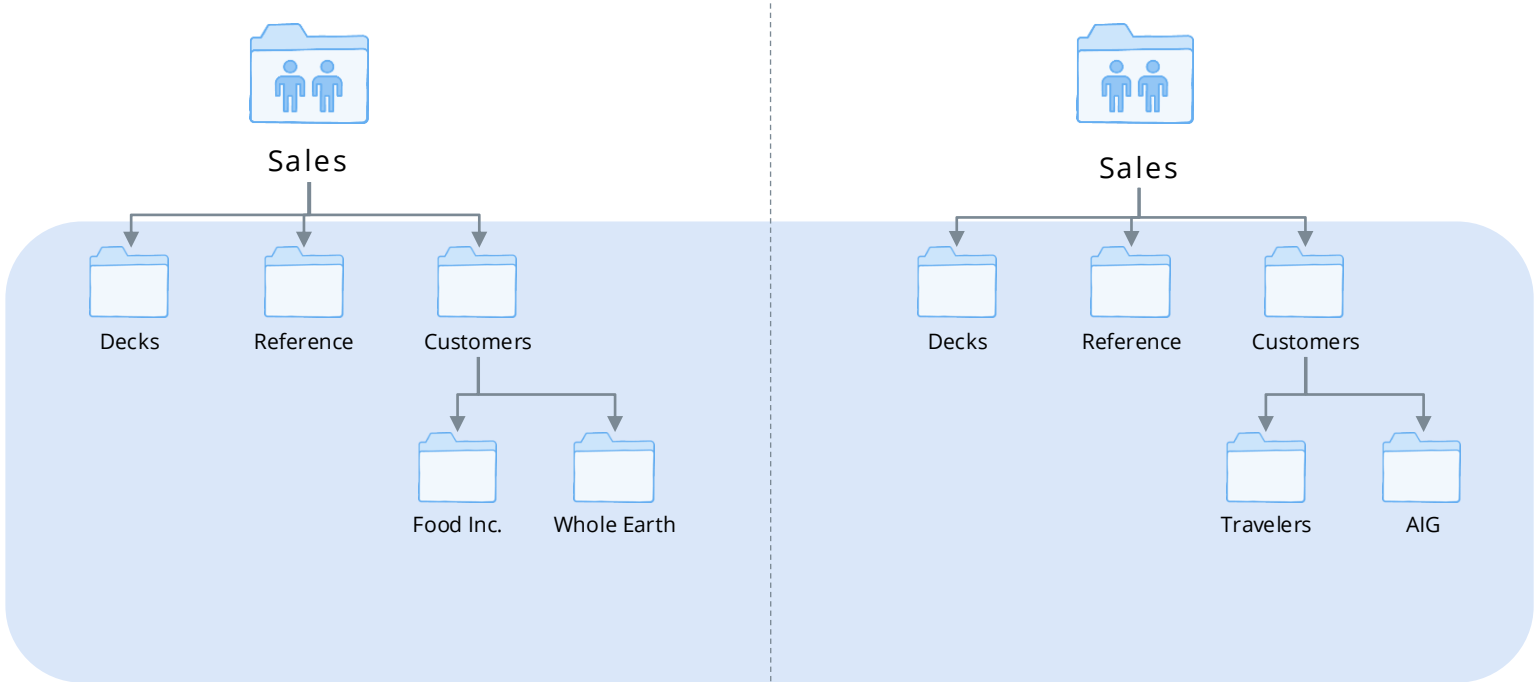
John - "Owner"



# Folder Naming

John - "Owner"

Maria - "Recipient"



# Folder Naming

John - "Owner"

Maria - "Recipient"



Sales



Decks



Reference



Customers



Travelers



AIG



Sales



Decks



Reference



Customers



Travelers



AIG

Sub folder names stay the same



# Recommended Folder Structures



Sales



Sales



Sales



Decks



Reference



Customers



Decks



Reference



Customers



Decks



Reference



Customers

---

Share the top folder...

---

...or share the subfolders

---

...not both!



# Additional Resources

## Dropbox Links

- [Dropbox Help Center](#)
- [Dropbox Business Guide](#)

## Customer Links

- [FAQ](#)
- [Help Center](#)

# Q&A

Thank you!