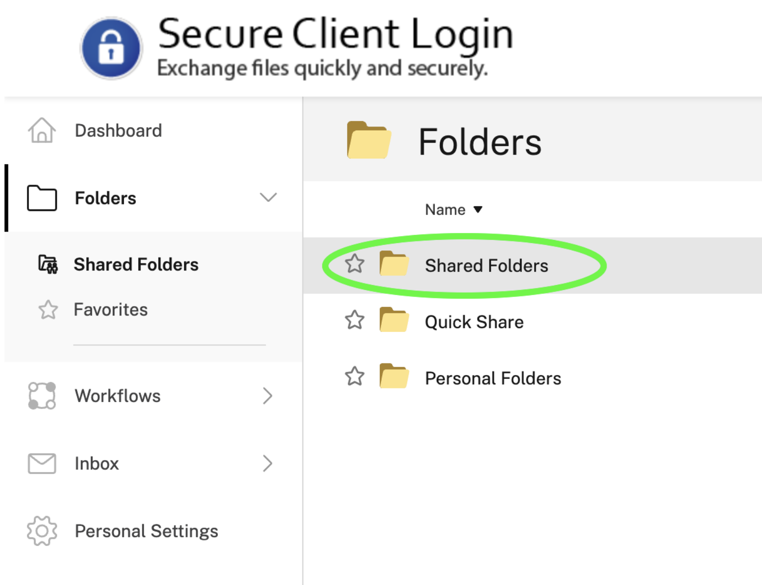
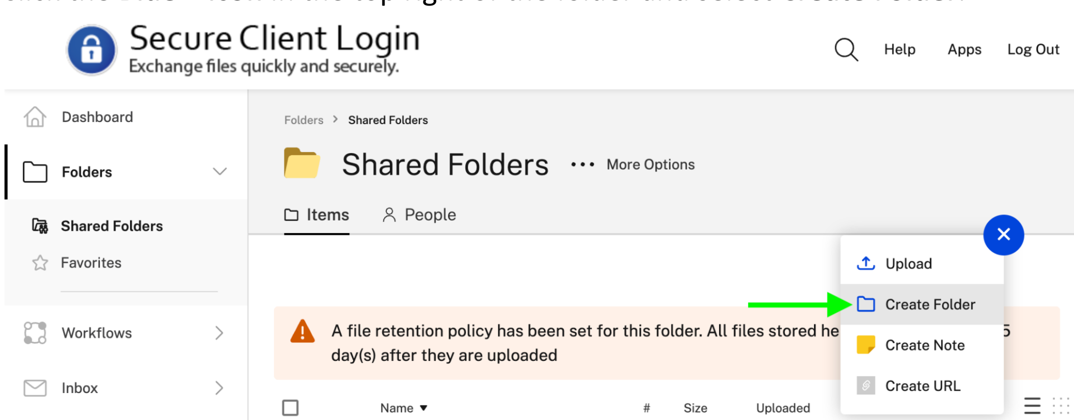
How to Use the Secure Client Portal v3.1.5 -
Quick Start Guide

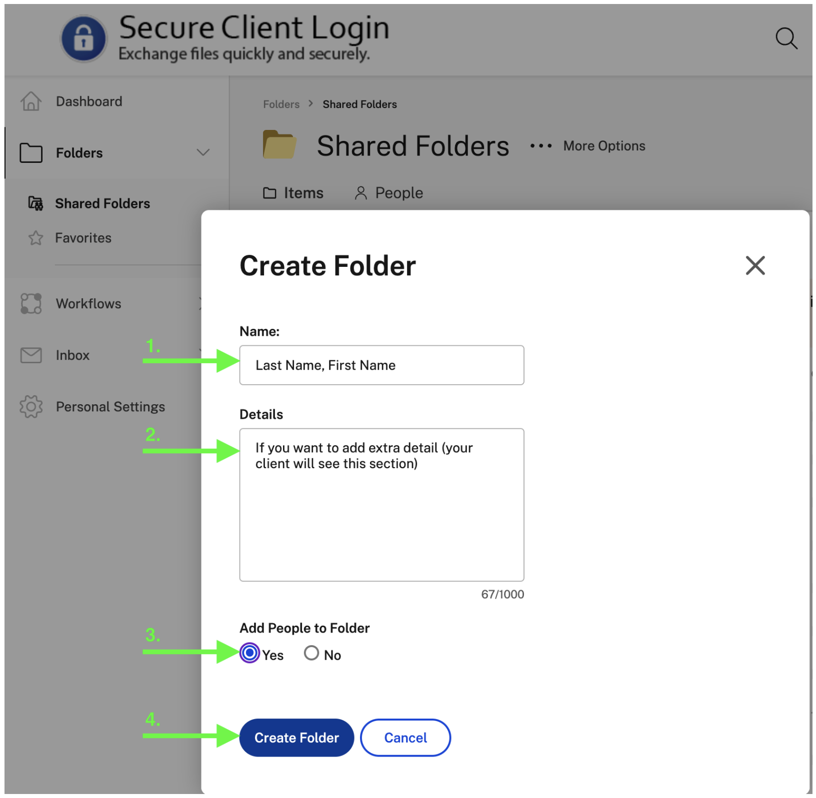
1. **LOGIN**
   - Log in to your Secure Client Portal using this link, or select the "Client Portal" tab on your website.
   - If you do not yet have a portal account, please email us at support@getnetset.com to request one.
   - If you've forgotten your password, you may click on "Forgot your password?" which can also be found on your "Client Portal" page.
2. **CREATE A FOLDER / INVITE YOUR CLIENTS**
   - On the left hand side, select **Folders** ⟶ **Shared Folders.**
   - Select **Shared Folders** again on the right.
   - **This is where you will create all of your client folders.**



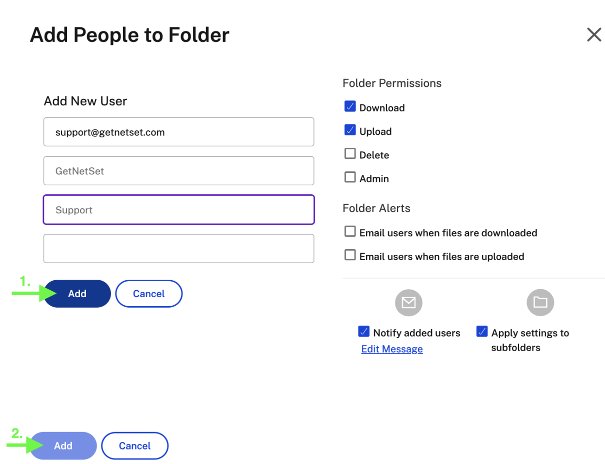
   - Click the **Blue + icon** in the top right of the folder and select **Create Folder**.



- Enter your **client's name (1)**, add details if you wish (2), and select **Yes** under **Add People to Folder (3)**. Then choose **Create Folder (4)**.



- Next select the **Black + icon** to **Create New User.**
  Note: *When adding a client to a folder, you will **always** select **Create New User**, even if you have added them before to other folders or they already have an existing account.*
- Enter your client's information, including **email address and first and last name**, then press **Add (1).** The default notification settings have already been selected for you. Now press the second **Add** button below (2). You will see the message "**People added successfully**", and your client will automatically be notified that they have been invited to access the folder.



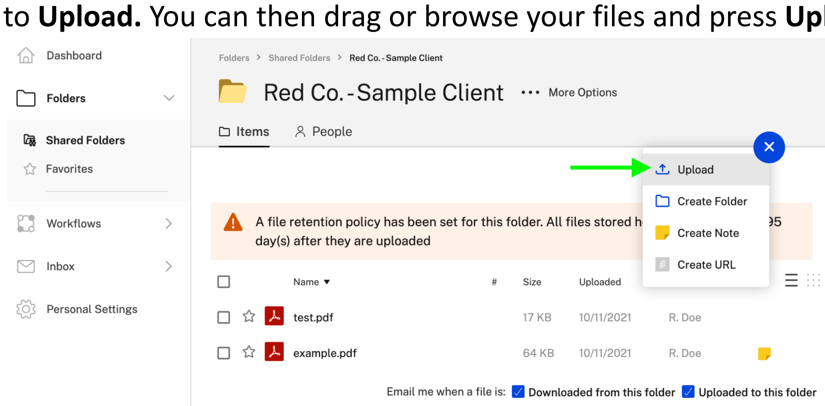
- ***Note:*** *If the fields are automatically filled in and "grayed out" so you can no longer edit them, it means the client already has a portal account. Simply follow the rest of the steps to invite their existing account. If they aren't sure how to access their account, they can use the same [Forgot Password]link as you, found right on your Portal page.*
- ***Note:*** *If you* ***accidentally closed out of the Add People to Folder window during the process****, not to worry – you don't have to go through the whole folder creation process again. Simply navigate to the* ***People*** *tab and select* ***Add People to Folder*** *to reopen the window. You can also use this method to add additional authorized people to a folder, like an employee or the client's spouse.*

CLIENT EMAIL RECEIVED

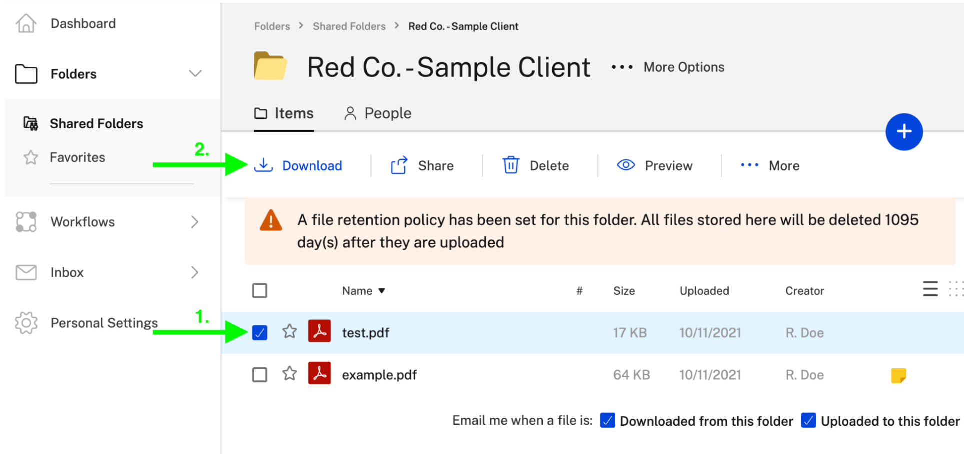
- Your client has been successfully added to the system and will receive a message like the one below, which contains an activation link. Once they click the link and set up their password, they will have access to the folder. You can direct them to the **Guide: Using the Portal** (found on the Portal page of your website) which will walk them through everything from receiving the invitation to logging in and uploading/downloading files.

3. UPLOAD / DOWNLOAD FILES

- Select the client folder you wish to upload to and press the floating **Blue + icon**, to **Upload.** You can then drag or browse your files and press **Upload** to complete.



- To **Download**, simply check the box or boxes of the item(s) you'd like to download (1), and press the **Download (2)** button that appears above.



DELETE USER

- You may optionally delete access to a folder. You can delete people from a folder by opening the folder and choosing the "People" tab. You can then select the box next to the name of the person you want to remove (1). Then choose "Remove Selected" (2) and confirm that choice (3).