



Setting Up Your Account and Inviting Clients

Version 2.4.1

Step 1

You will receive an email welcoming you to SecuredFiles. Click **“Set your password”**.

Your SecuredFiles account was created Inbox x  



SecuredFiles <notifications@notifications.my.securedfiles.com>
to ABC Tax & Accounting ▼



Welcome aboard ABC Tax & Accounting

Welcome to your SecuredFiles account, you can add, protect, and share your data.

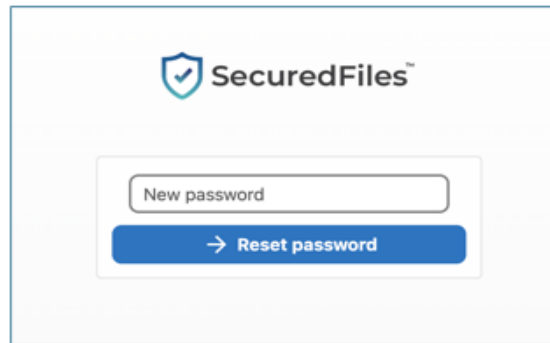
Your Login is: ABCTaxAccounting

[Set your password](#)

[Install Client](#)

Step 2

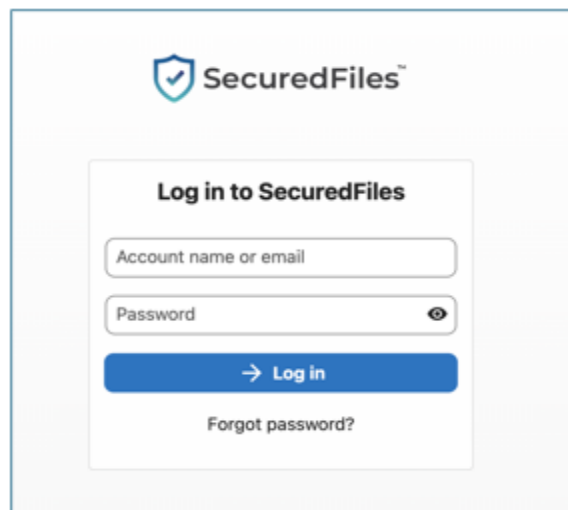
Enter a password for your account and press **“Reset password”**.



The image shows a web form for resetting a password. At the top is the SecuredFiles logo, which consists of a shield icon with a checkmark and the text "SecuredFiles™". Below the logo is a text input field labeled "New password". Underneath the input field is a blue button with a right-pointing arrow and the text "Reset password".

Step 3

Log in to your account using the password you set above and press **“Log in”**.



The image shows a web form for logging into a SecuredFiles account. At the top is the SecuredFiles logo. Below it is a heading "Log in to SecuredFiles". Under the heading are two text input fields: "Account name or email" and "Password". The "Password" field has a toggle icon (an eye) to its right. Below the input fields is a blue button with a right-pointing arrow and the text "Log in". At the bottom of the form is a link that says "Forgot password?".

Step 4

For your security, you are required to use multi-factor authentication (MFA/2FA).

By default, your account is configured to send a code to your email address. After logging in, you can add or change your MFA settings.



Email



A new authentication code was just sent. Please enter it:

Authentication code

Submit

Cancel login

Step 5

Check your email for the security code.

The subject line should be “**Login attempt for [...]**”

If you do not see the email, please check your Spam folder.

In the screenshot below, the code is **123456** but your code will be different.

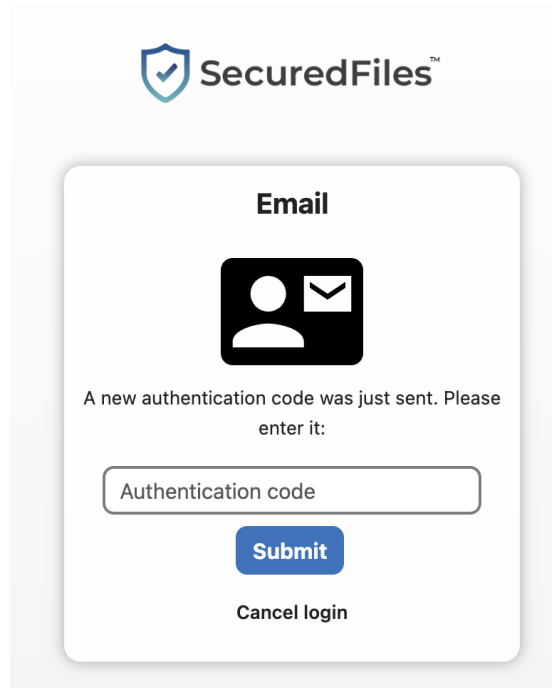


Your two-factor authentication code is: 123456

A sign-in attempt was made for your SecuredFiles account. Your one-time confirmation code is: 123456 Enter this code to complete sign-in. This code expires soon and should not be shared with anyone. If you did not request this code, change your password immediately.

Step 6

Enter the security code from your email into the text box and press “**Submit**”.



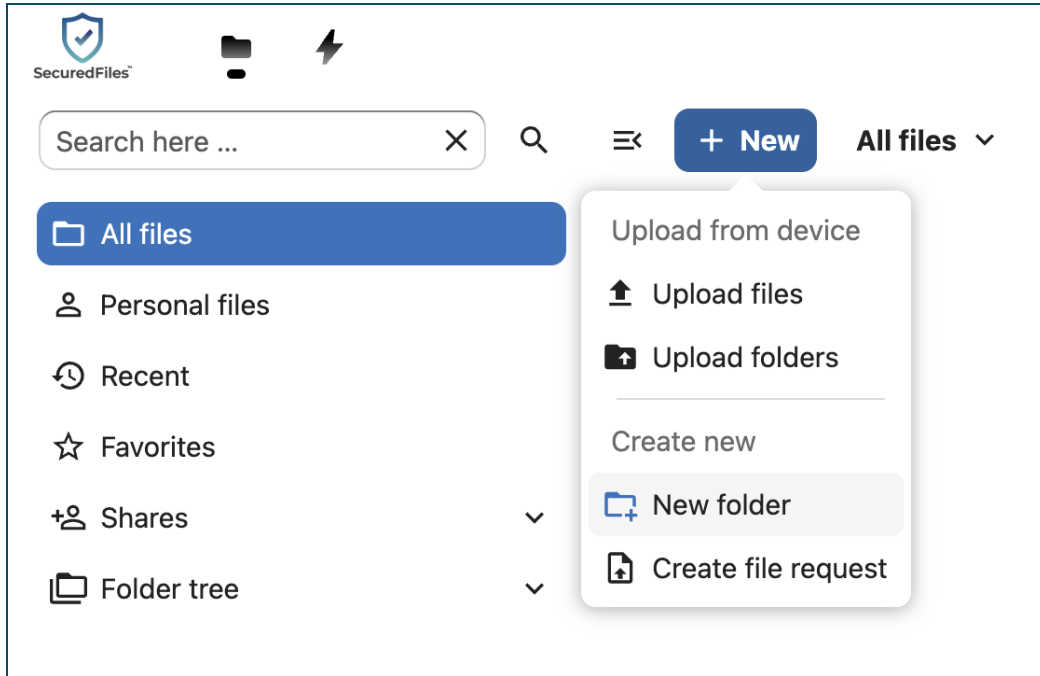
The image shows a web interface for SecuredFiles. At the top is the SecuredFiles logo, which consists of a blue shield with a white checkmark and the text "SecuredFiles™". Below the logo is a white rounded rectangle with a subtle drop shadow. Inside this rectangle, the word "Email" is centered at the top. Below it is a black square icon containing a white person silhouette and a white envelope with a checkmark. Under the icon, the text "A new authentication code was just sent. Please enter it:" is centered. Below this text is a white text input field with the placeholder text "Authentication code". Under the input field is a blue button with the word "Submit" in white. At the bottom of the white rectangle is the text "Cancel login" in a smaller font.

Step 7

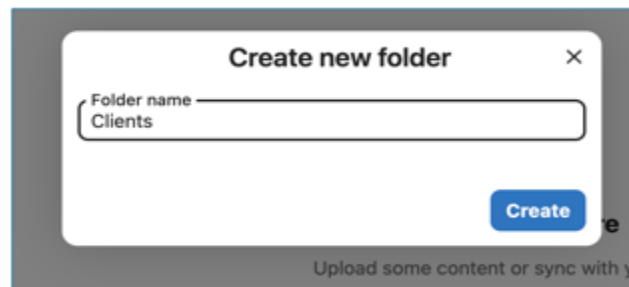
Add your first folder.

For example, “**Clients**”. This can be useful for keeping all your client files organized.

Click “+ New”  New and then “New folder”  New folder



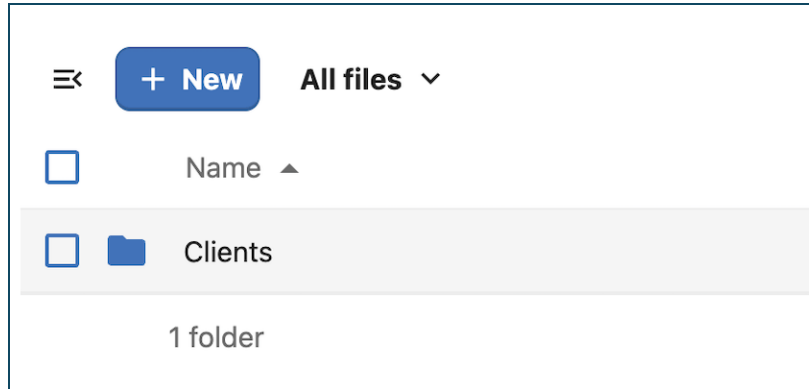
Enter a name (e.g. “**Clients**”) as the folder name and click “**Create**”.



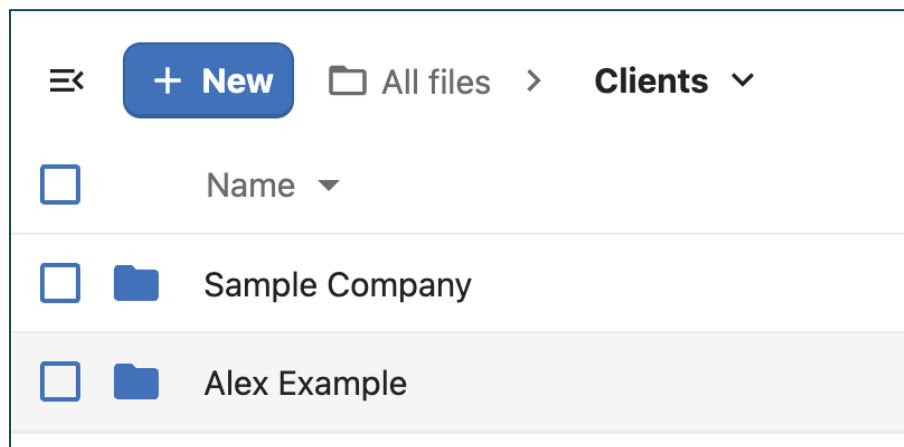
Step 8

Add folders for your clients. This is how you will organize client-specific files.

Click on the new “**Clients**” folder.



You can now add additional folders for your clients. For example, you can create a new folder called “**Sample Company**” and another folder called “**Alex Example**”.



Step 9

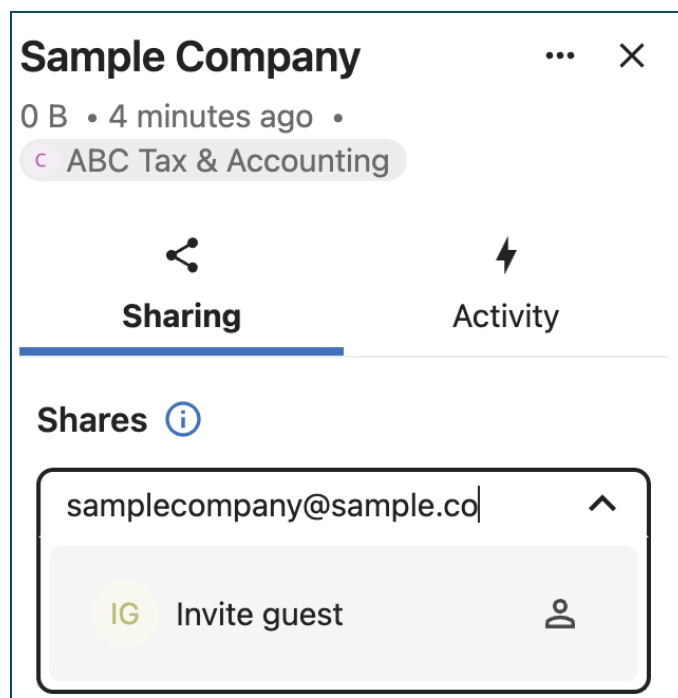
Invite a client to view their files.

To invite a client to a folder, click the  icon.

☐	Name ▾		Modified
☐	 Sample Company	 ...	2 minutes ago
☐	 Alex Example	 ...	2 minutes ago

On the right-hand side, the Sharing window will open.

Enter the client's email address and click **"Invite guest"**.



Enter the client's name under "Guest Name".

Be sure to double-check that you entered the email address correctly.

Then click **"Invite guest"**.

Invite Guest ×

Guests are accounts with limited permissions who will be able to access resources shared with them and use apps.

Guest Name

Sample Company

Email

samplecompany@sample.co

Language

Default ▼

+ Invite guest

IMPORTANT: You are not quite done. You must click **“Save share”** to grant the user access. If you do not, you will need to repeat the step above.

Note: The default permissions allow your client to Create (Upload) and Read (Download) but not Delete. You can adjust these permissions to suit your preferences at any time.

1 Share with Sample Company

👁 View only

✎ Allow editing

... **Custom permissions**
Read, create

Advanced settings ▲

☐ Set expiration date

☒ Allow download and sync

☐ Note to recipient

☒ Custom permissions

☒ Read

☒ Create

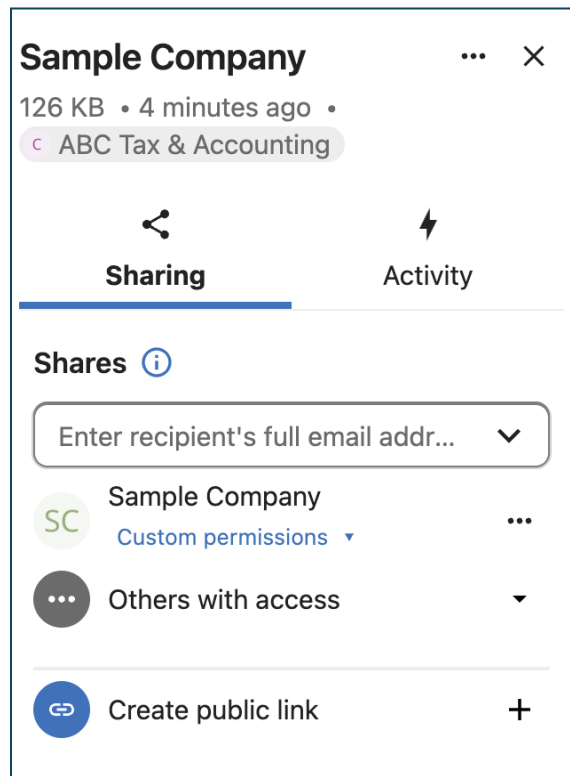
☐ Edit

☐ Share

☐ Delete

Cancel Save share

You can now see the “Sample Company” user is listed.



All done! Your client will receive the following invitation to set up their account to access their folder. Once they click “Activate account” they will be prompted to set a password and then they will be able to see the files you shared with them.

Note: If the user is logged in and does not see the files, double-check that you pressed “Save share” in the step above.

ABC Tax & Accounting invited you as a guest

Inbox x



ABC Tax & Accounting via SecuredFiles <notifications@notificatio...
to Sample ▾



You have been invited

ABC Tax & Accounting

You can activate your guest account with the button below.

After your account is activated you can log in with
samplecompany@sample.co.

Activate account