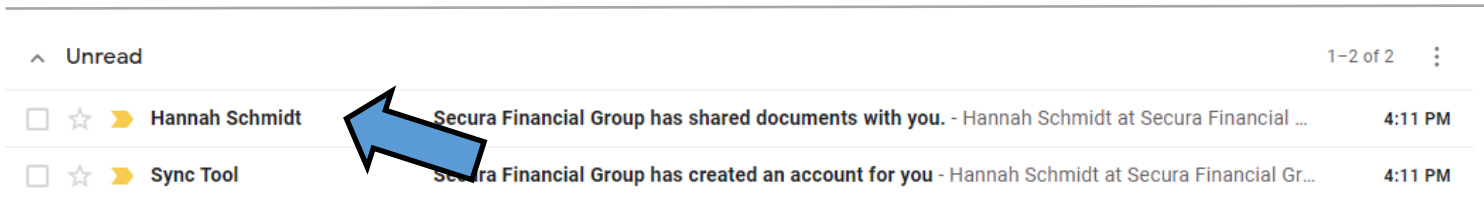


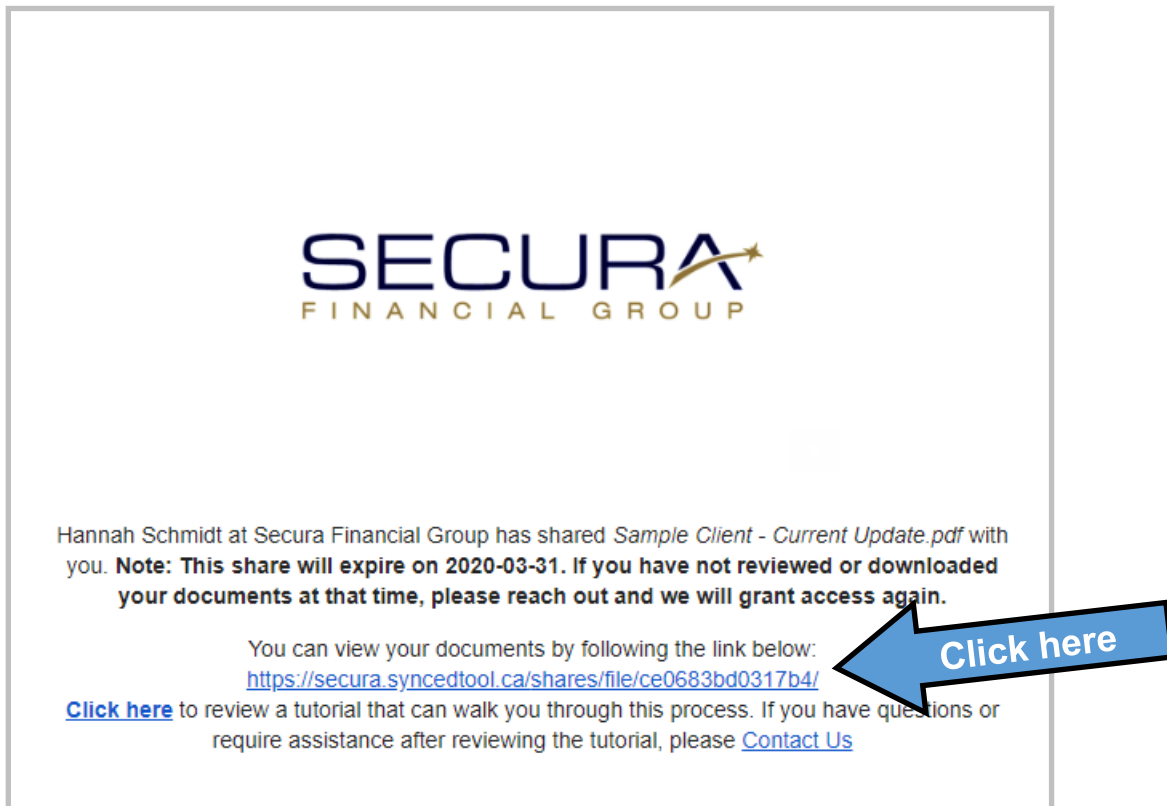
How To Download Files from Sync

This tutorial assumes that you have already registered for a Sync account and that you have your username and password ready.

(Please note that the images in this tutorial are taken from the gmail interface, so your inbox and the message might look a little bit different, but the content should be the same! In this case, Hannah set up the share, but that name could be any member of our staff or your advisor.)



STEP 1: Open the email from the Secura Team member who has shared files with you—the subject line should say that documents have been shared with you. Once that email has been opened, it should look something like this:



This email has important information including the expiry date for the file share. If you have not downloaded the file by that time, the link will not work and we will need to re-grant you access. If you need more time, or need access re-granted, follow the 'Contact Us' link at the bottom.

To go ahead and download your files, follow the link pointed out above!

STEP 2: Open the email from the Secura Team member who has shared files with you—the subject line should say that documents have been shared with you. Once that email has been opened, it should look something like this:



From here, you can input your username and password that you have already created. Then choose 'Log In' to proceed.

If you have forgotten your password, choose the 'Forgot Password?' and follow the steps in the blue box!



Forgot your password? Choose this link!



Once you have clicked the 'Forgot Password?' link, you will be sent to this screen. From here, you can enter your email address and choose 'Reset Password' - you will then see a screen confirming that the reset went through and you will receive an email.

The email from 'Sync Tool' will look like this!

You have requested to reset your password.

Please visit the following link to log in and reset your password:

<https://secura.syncedtool.ca/auth/reset/LhiekcjsTsMu9D5iN08EdLwQ8jYK40/>

[Need to disable two-step authentication?](#)

2

When you follow the long link, you will be sent to your account settings, the screen should look familiar! If not, take a look at the account set up tutorial we have provided. The steps will be the same!

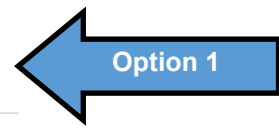
Step 3: Once you are at this document screen, you have multiple options. **The first** is to click the green download icon which will automatically start the file downloading through your internet browser. Where this saves depends on your internet settings, but the default is typically your computer's download file. **The second** is to click on the blue text, which will open up a preview so you can view the document. This does not download the document.



Sample Client - Current

My Account

Download



[Go to My Shares](#)

Update.pdf

And that's it! Step 3 can be repeated for each document which was shared with you.



Sample Client - Current Update.pdf



If you have run into any other problems, [let us know by emailing sfg@securafinancial.com](mailto:sfg@securafinancial.com)

