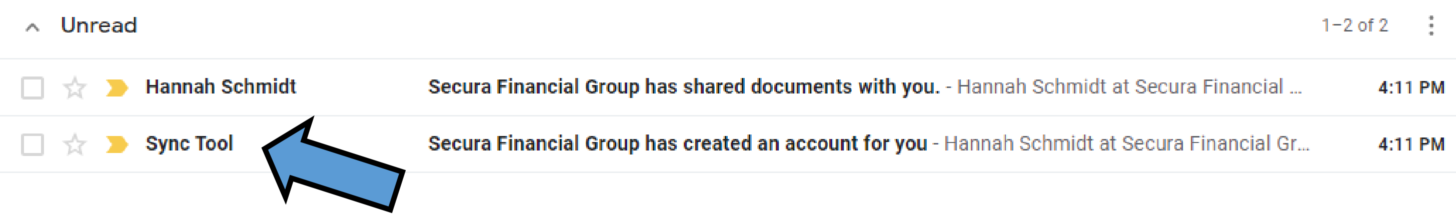
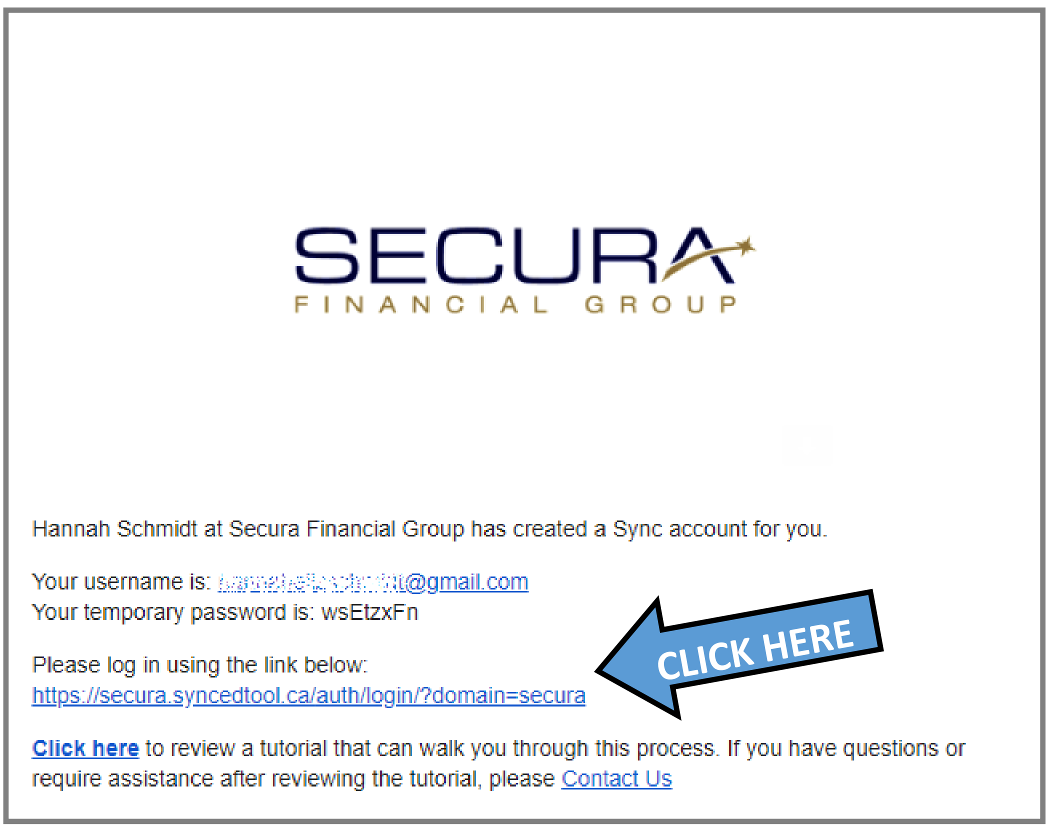
How To Create Your Sync Account

When a member of the Secura team creates a Sync account for you, an email from ’Sync Tool’ will appear in your inbox alongside an email linking to your documents. **The first step is to set up your account!**

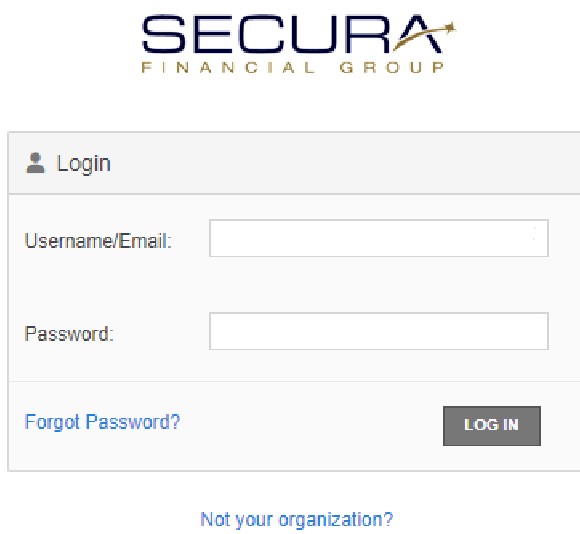
(Please note that the images in this tutorial are taken from the gmail interface, so your inbox and the message might look a little bit different, but the content should be the same! In this case, Hannah set up the share, but that name could be any member of our staff or your advisor.)



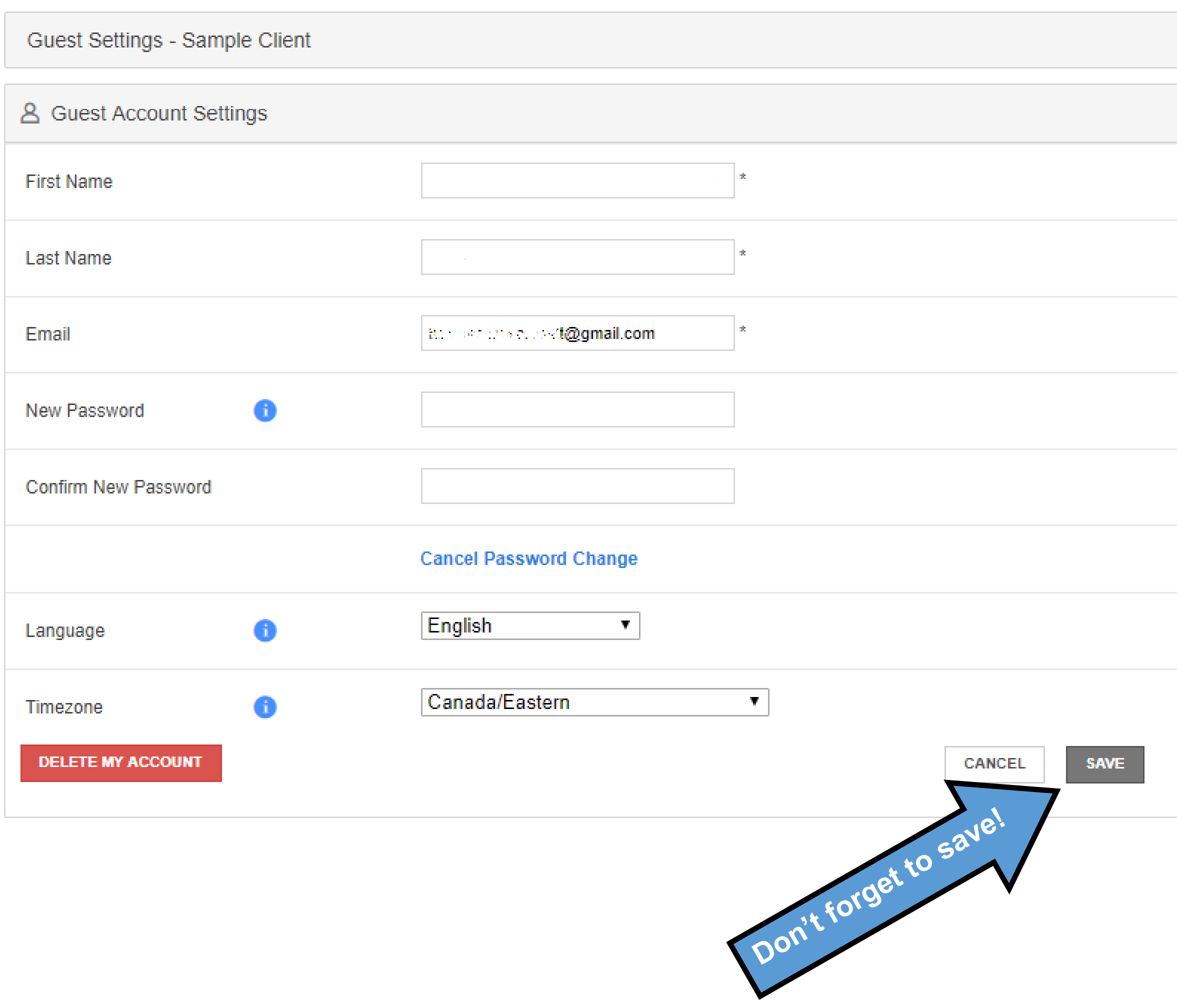
STEP 1: We’ll start with the email from Sync Tool, and when it’s opened it will look something like the image below. Your Sync username will be your email address, and the password will be a randomly-generated string of characters. **Do not use the password shown here!** To start with your account, follow the link with the big arrow.



STEP 2: At the login screen, input the information provided in the email you were sent from Sync Tool

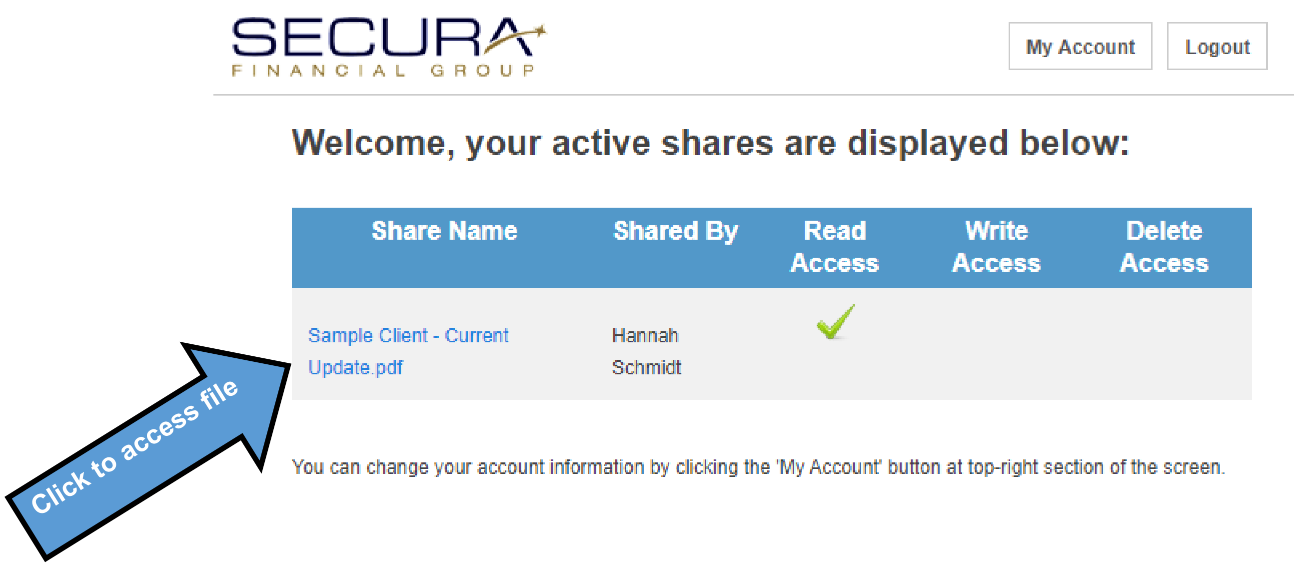


STEP 3: To create your account, you can work through each box changing your name, language, and timezone. The most change is the password. Click through the blue link to change password, and the page will look like the picture below. Note that your password needs to be 8 characters long, with letters/numbers and special characters (like %, $, # etc.). Once you have decided on your password and entered it into both fields, and choose 'Save'. **Don't forget to save your password in a safe place!**

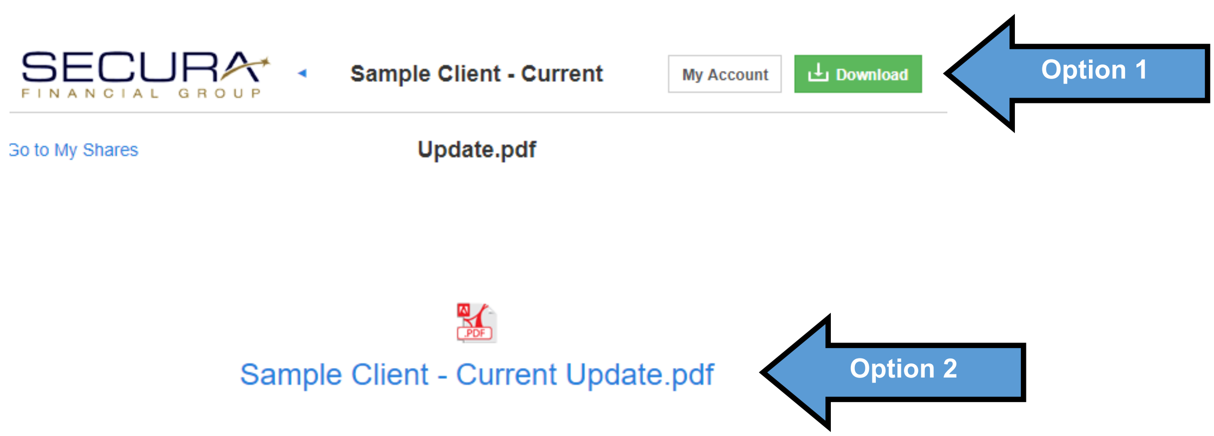


STEP 4: Now you can access your document(s). What appears is based on what has been shared with you, so it could be one document or many! Your landing screen should look like the image below. You can click through on the document name to access it.

Note: By choosing 'My Account' in the top right, you can return to the screen from Step 3 to change any information including your password.



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.



And that's it! Step 4 can be repeated for each document which was shared with you.

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