

Client Access to the Vault

Loading files to the Vault

Access the Vault under the "more" menu (represented by three dots) after opening the client's plan:



There are two tabs within the Vault - the Shared Folder and the Private Folder.

Loading files to the Vault

Vault

The vault is a place where you can store important files that you can access from anywhere. Both you and your advisor can store files in the shared folder that you can both access. In addition, you can store files in your private folder that only you have access to.

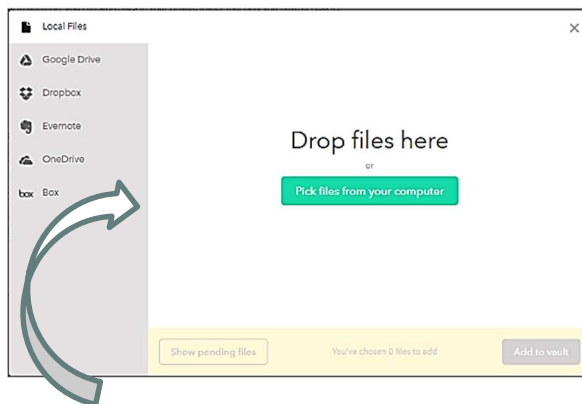


2 Click Add File to add files directly into the Vault.

Tip

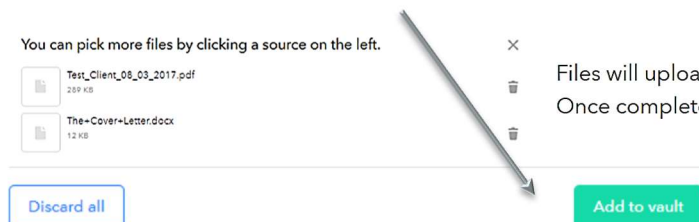
You can also click on the icons on the left to copy documents from popular online services such as Google Drive, Dropbox, Evernote, OneDrive, or Box.

- Files to be loaded to the vault must be under 25 MB in size. There is no limit on the total number of files you / your client can load to the vault.



Click Pick files from your computer to select files or drag-and-drop files into the screen displayed above. You can select multiple files at once to load to the Vault.

3 Click Add to vault to add the files:



Files will upload in a timely manner; you will be able to see the upload progress. Once complete, the files will be accessible to the client on their Vault.

Organizing files within the Vault

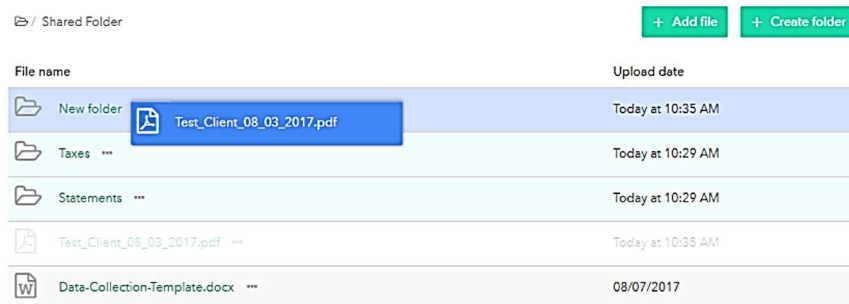
Set up folders to help organize the files within the Vault.

- 1 Click on Create Folder, type in the name of the new folder, and hit Enter or click on the green check mark to add the folder.



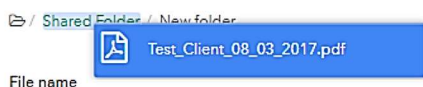
- 2 Once you create a folder, drag-and-drop files from the main folder to the new folder: simply click on the file, hold the mouse button, and drag the file into the folder you wish to put the file in.

Here's what it may look like when using the drag-and-drop feature to move files:

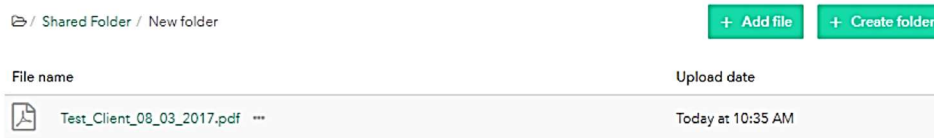


Tip

To move a file out of a folder, click on it and drag-and-drop it to the appropriate folder in the folder path above:



- 3 Click on the folder to see the file within that folder:

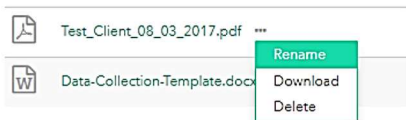


Note

- A folder path appears above the file list in the Vault to help navigate
- Create nested folders by adding a new folder within an existing folder, or by dragging-and-dropping one folder into another.

Updating / Downloading Files from the Vault

Once files are in the Vault, update or download files by clicking on the ellipses next to the file name:



Options include: rename the file, download the file, or delete the file. You can also download files by clicking on the file name.

You cannot rename or delete files loaded and shared by your advisor, but files you add may be renamed, downloaded, and deleted by you.

You can sort information in the vault by file name or date added by clicking on the column name once to sort lowest to highest; clicking on it again to sort highest to lowest. Folders will always display before files; both folders and files will be sorted by the column selected.