

NAVIGATOR CLOUD DRIVE POWERED BY BOX

An easy and secure way to share documents

Our ability to share information with you and your professionals regarding your wealth and financial situation is an important part of our process. We are making that sharing process as safe as possible. **Navigator Cloud Drive powered by Box** is a secure solution designed to work more efficiently and with greater piece of mind.

FEATURES AND BENEFITS

MOBILITY

Box is a cloud-based solution, so you can view or share files on any device, anywhere, with the Box Mobile App. View files in 120+ formats whether you're on or offline.

SECURITY

Box is equipped with enterprise-grade security. Ensure the confidentiality and integrity of your files with encryption for content in transit and at rest. You can also share documents with password protected links and set expiration dates for shared links.

SEAMLESS INTEGRATION

Box has thousands of apps and add-ons to help you seamlessly connect to Box through your favourite programs - Microsoft, Apple, Google, Adobe, etc.

GETTING STARTED

Getting started is easy! We will send a request to collaborate on a folder via email. Accept the invitation and log into your existing Box account. If you do not have a Box account, one can be easily set up for **FREE**. Once you've logged in, you're all set!

For further assistance, please contact our office:
TFP@assante.com or toll free 1-800-461-9519

Setting up a free account

1. You will receive an email from **<noreply@box.com>** on our behalf.
2. Click on **Accept Invite**.
3. On the **Box Individual** screen enter your details then click **Submit**.
4. You will receive a confirmation email to finalize the setup of your Box account.
5. Using the link provided in the email, you will be directed back to Box. Click on **Skip this and go straight to Box**.

Uploading files or folders

Method #1

1. Drag and drop the file/folder from its source into your desired location within Box.

Method #2

1. Click on **Upload** on the top right of the screen.
2. Select **Files** or **Folders**.
3. Locate the file or folder you wish to upload and click **Open**.

Downloading files or folders

1. Click to highlight the file or folder you wish to download.
2. Click on the **Download** button at the top right of the screen

Printing

1. Click to open a preview of the file.
2. Click on the file name on the top left of the screen to open a drop-down menu.
3. Select **Print**.



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