

HPH Solutions

GUIDE TO SETTING UP A SECURE BOX FOLDER



WHY THIS IS IMPORTANT

In the 'old days', when clients sent us documents (sensitive or not), they would do this via email. Today, there are far more secure ways for clients to share their data with us, and we take our role in protecting your data very seriously.

For this reason, we are asking all clients to set up a Box account with two-step verification. While this process involves a few steps, it only needs to be done once. Once done, you will use that Box account to:

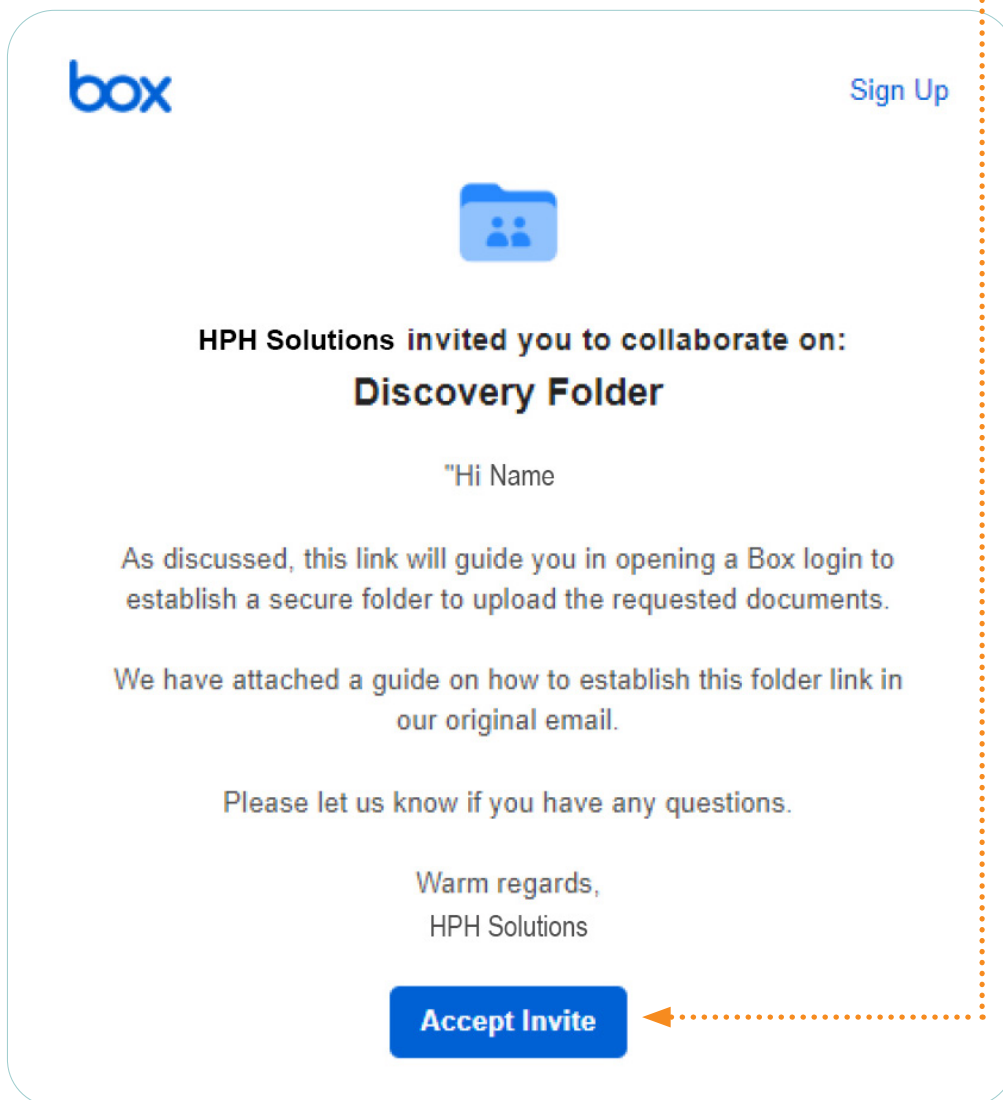
- Provide information to us easily and securely
- Receive clients forms and information from us easily and securely
- Access all your client info in one secure location that both you and we have access to.

Please follow the instructions in this guide to set up a secure Box account.



STEP 1

You will have received an email from Box via HPH Solutions. Click **Accept Invite**.



STEP 2

The 'Create your account' screen will appear. Enter the details below and click 'Submit'

Create your account
HPH Solutions has invited you to collaborate on "Discovery Folder"

Sign up for a Box account to accept invitation

1. Enter your full name → Full name
2. Enter the password you want to use → Password
3. Confirm the password you want to use → Confirm password
4. Enter your phone number → Phone number
5. Agree to the Terms & Conditions by ticking this box → By ticking this box, you agree to Box's [Terms of Service](#) and confirm you have read Box's [Privacy Policy](#). You also agree to receive emails from Box regarding product and service updates, special offers, events and webinars, and other marketing materials. You may unsubscribe at any time.
6. Click submit → Submit

You're invited to collaborate on:

- Discovery Folder
Shared by HPH Solutions

HPH Solutions HPH Solutions

Once you click 'Submit', Box will send you a confirmation email.

You will see this message on the screen. Go to Step 3 to see what to do next.

We've sent you a confirmation email

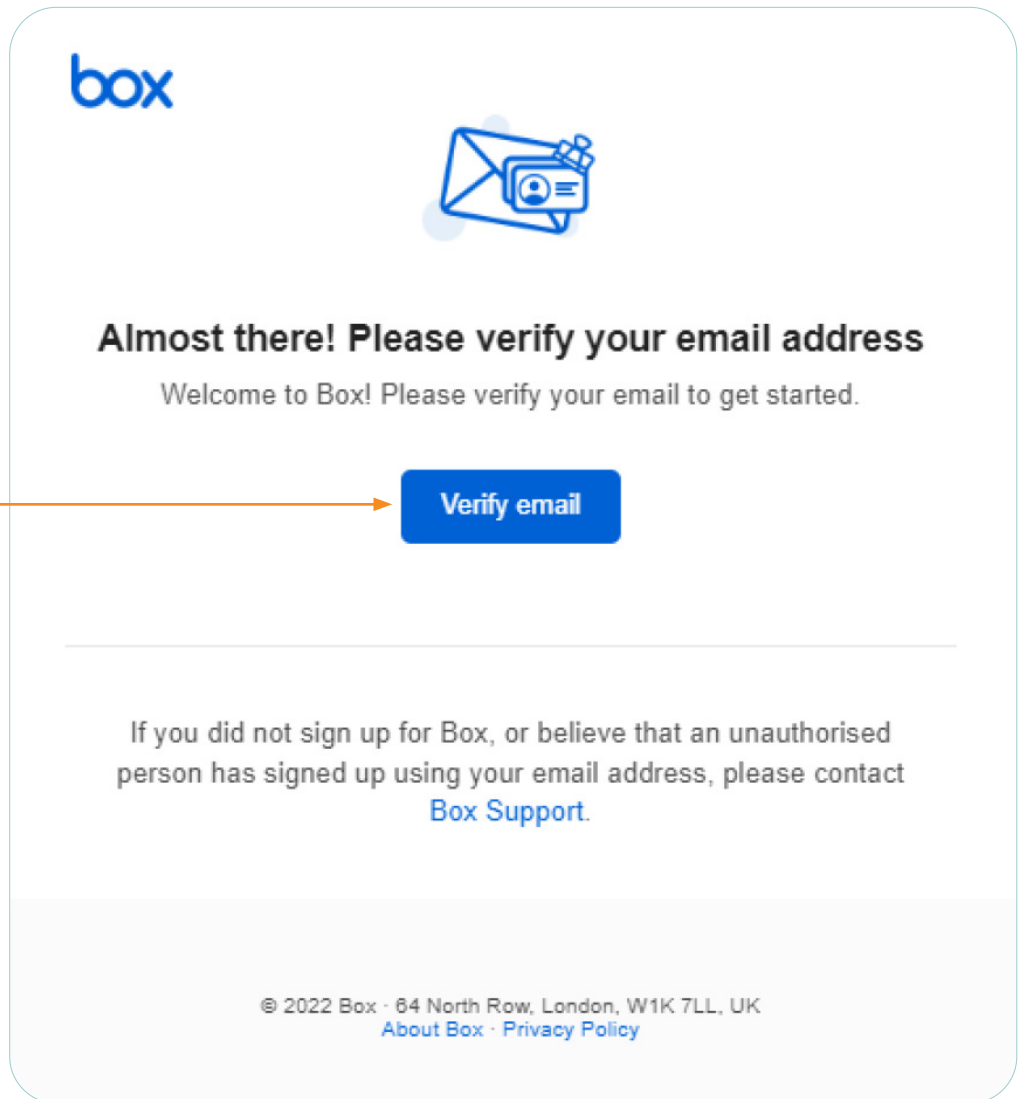
To log in to your account you'll need to verify your email: youremail@youremail.com

Open Gmail Open Outlook

Can't find the email? [Click here to resend.](#)

STEP 3

Head to your inbox. You should see an email there from Box that looks like the below.



Click the 'Verify email' button

Congratulations! Your Box account is set up. You now have a permanent and secure location to upload the documents we need to provide you with financial advice for life :) Please head to the next page in this pdf where we'll share how to upload documents to Box.

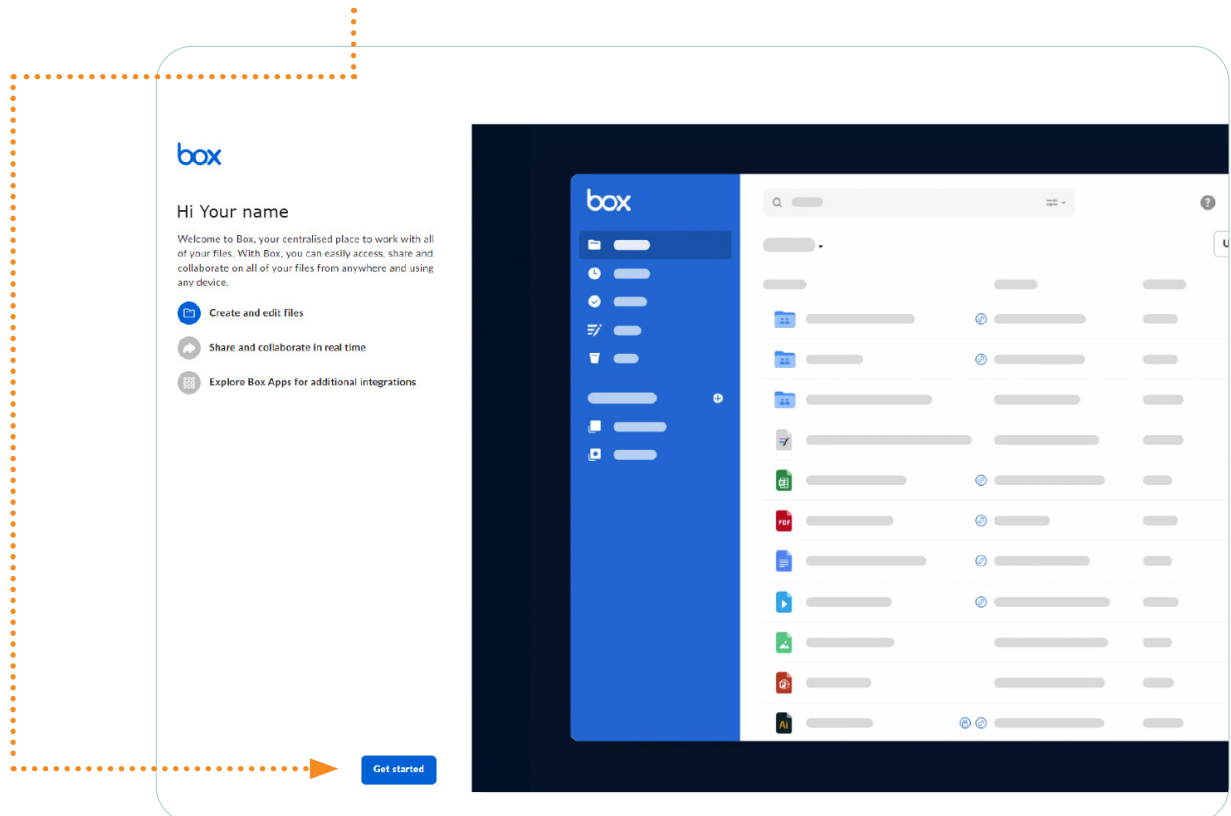
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GUIDE TO UPLOADING DOCUMENTS TO YOUR SECURE BOX FOLDER



STEP 1

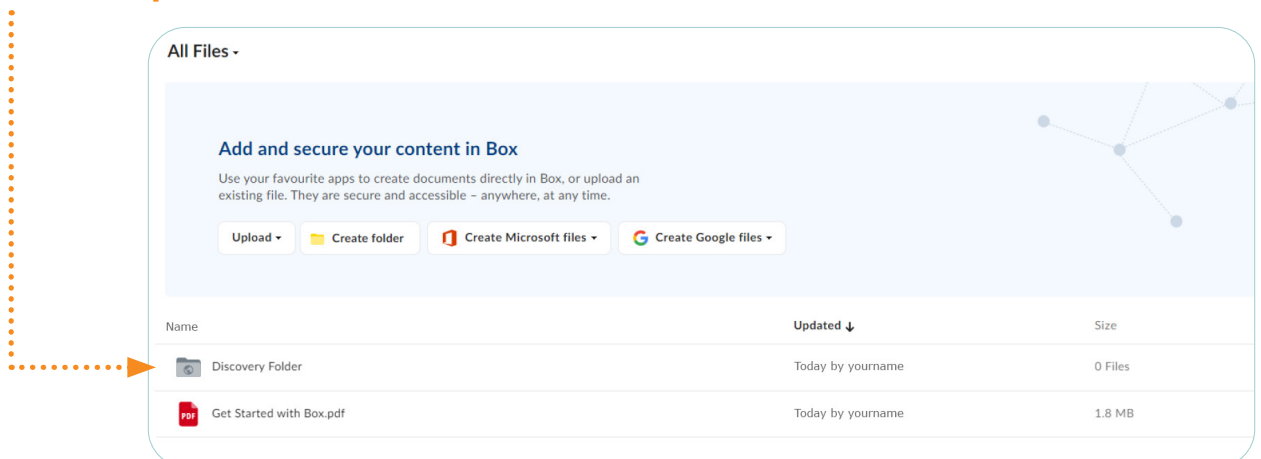
Now that you've verified your email address, head back to your internet browser. You should see this screen. Click the **Get started** button.



STEP 2

Clicking the **Get started** button will open up this screen pictured below.

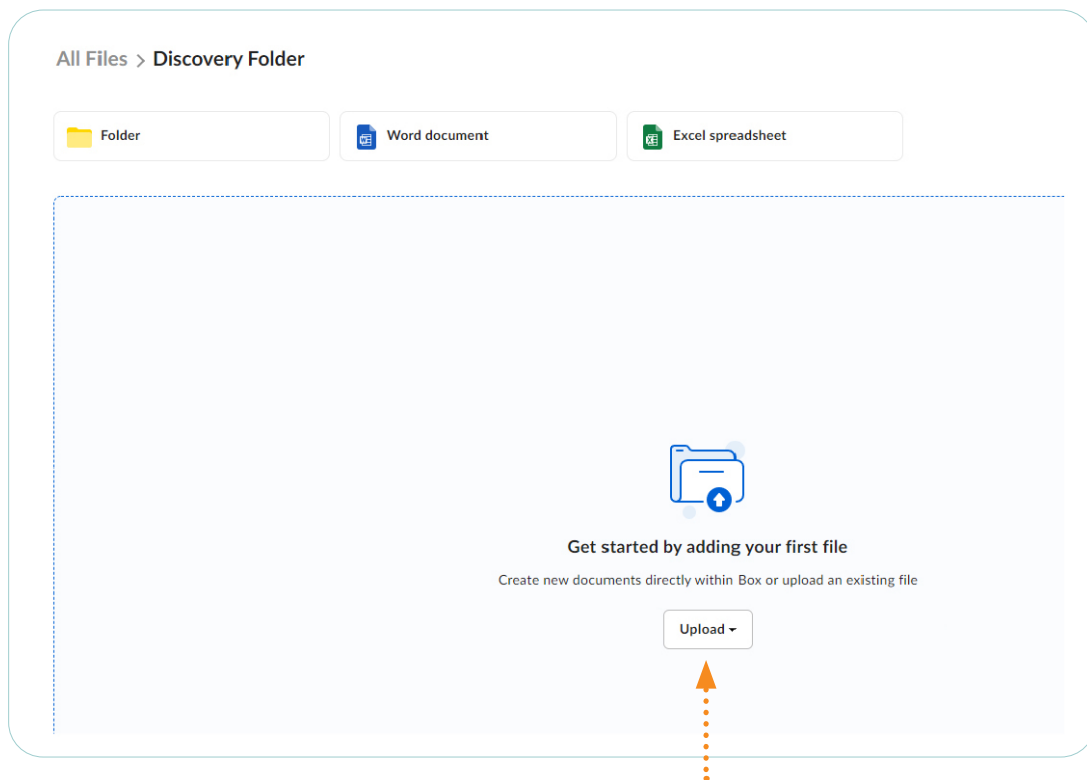
Click on **Discovery folder**.



STEP 3

All documents you wish to share with your adviser should be uploaded to this folder. Sharing files this way ensures that all the sensitive information being shared with us is done securely. (Email is not secure.)

We will also upload files we want to share with you to your Box folder. Having all your important documents in a single, secure location will mean you always know where to go when you want to view your files. No more searching through email!



**Click here to upload your files from your computer.
You can also drag and drop files directly on to this bit of the screen to upload.**

ACCESSING YOUR BOX FOLDER GOING FORWARD

Every time you need to provide documents to us, you will need to access your Box folder. For this reason, it is a good idea to bookmark your Box folder in your browser.

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GUIDE TO SETTING UP TWO-STEP VERIFICATION FOR YOUR BOX FOLDER



WHY THIS IS IMPORTANT

2-step verification is an extra step at login that protects you in the event of your password being compromised (via hacking, guessing or phishing).

We request that all clients set up 2-step verification on their Box account as this adds an extra layer of security

Setting up 2-step verification on your Box folder is easy. Just follow the steps on the next few pages and you'll be done in no time.



STEP 1

Log in to your Box account.

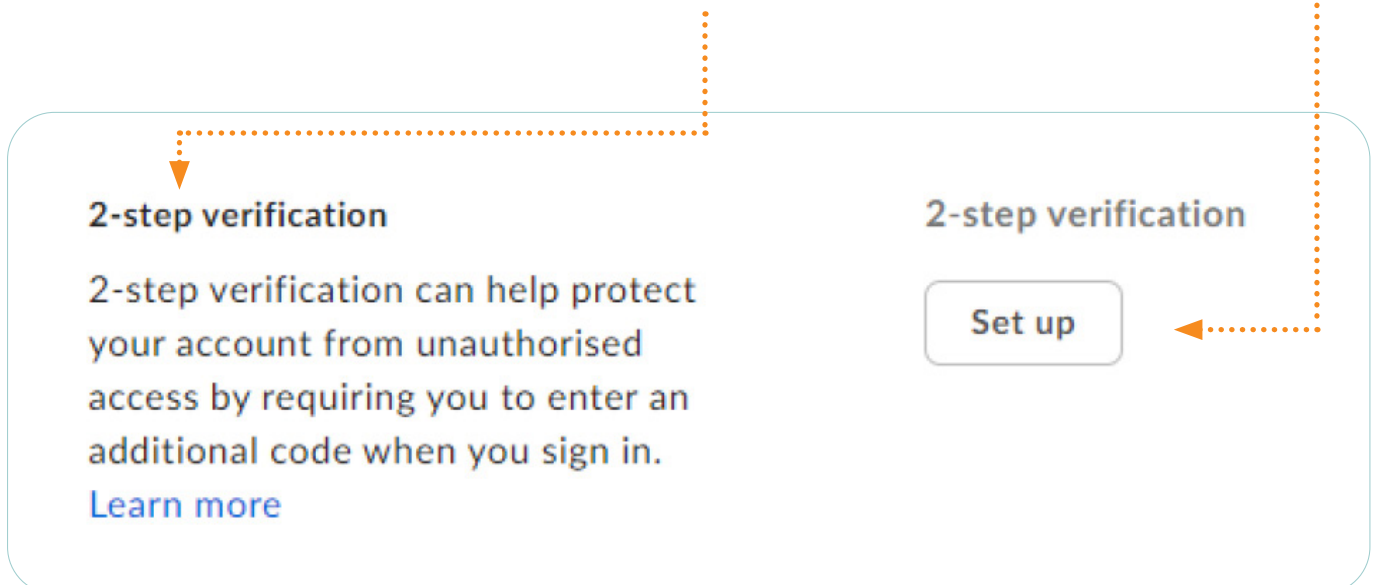
STEP 2

Click on your account icon in the top right corner of the page, and then select **Account Settings**.



STEP 3

Under the Account tab, scroll to the **2-step verification section** and click **Set up**.



STEP 4

You will now be offered three ways to do your 2-step verification.

Box will recommend you choose Authenticator app. And if you already have an Authenticator app on your phone and are familiar with its use - go right ahead and choose that option.

If you've never heard of an Authenticator app/don't have one on your phone already, we recommend you select SMS text message.

But if you prefer email, select that option.

Set up 2-step verification [X]

Select a sign in option:

- Authenticator app** RECOMMENDED
You will receive a code from an authenticator app to sign in. [View suggested authenticator apps](#)
- SMS text message** ←
You will receive an SMS text message on your phone with a code to sign in.
- Email**
You will receive an email with a code to sign in.

The next few pages outline the process involved depending on which of the three options you've selected above.


STEP 5 - AUTHENTICATOR APP OPTION

If you chose 'Autheticator app' in Step 4, Box will open up a new window with a QR code for you to scan. The QR code will look like the below (but won't be the exact QR code below).

Set up 2-step verification [Close]

Authenticator app

Step 1
Using an authenticator app, scan the QR code or manually enter the secret key. [View suggested authenticator apps](#)



PA4U CREU P4G7 A6CW ECLA

Step 2
Enter the 6-digit code from your authenticator app.

Authentication code

[Back] [Submit]

1. Use your authenticator app to scan this QR code
2. Enter the 6-digit code the authenticator app gives you.
3. Click submit

2-step verification is now set up for your Box account. The next time you login to Box, you will be prompted to enter a verification code from your Authenticator app.

STEP 5 - SMS TEXT MESSAGE OPTION

If you chose ‘SMS text message’ in Step 4, Box will ask you what your mobile number is. After you have provided your mobile number, the following screen will appear:

1. Enter the code you received via text message

2. Click continue

2-step verification is now set up for your Box account. The next time you login to Box, you will be prompted to check your phone for a verification code sent via SMS.

STEP 5 - EMAIL OPTION

If you chose 'Email' in Step 4, Box will show you the screen below. Click **Continue**.

Check your email for the confirmation code and enter it as shown below:

2-step verification is now set up for your Box account. The next time you login to Box, you will be prompted to check your phone for a verification code sent via email.