



morrrows



Box User Guide

Introduction to Box

Industry leading secure file storage and sharing service.



Your financial future,
tailored your way



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1. Initial Setup

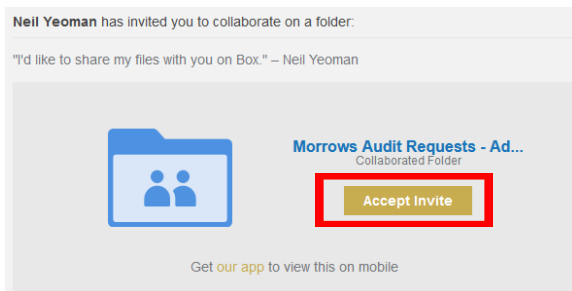
The following section will take you through step by step how to set up and activate your Box account for the first time.

If you have any queries or need further assistance, please contact your Morrrows Advisor or Client Service Coordinator.

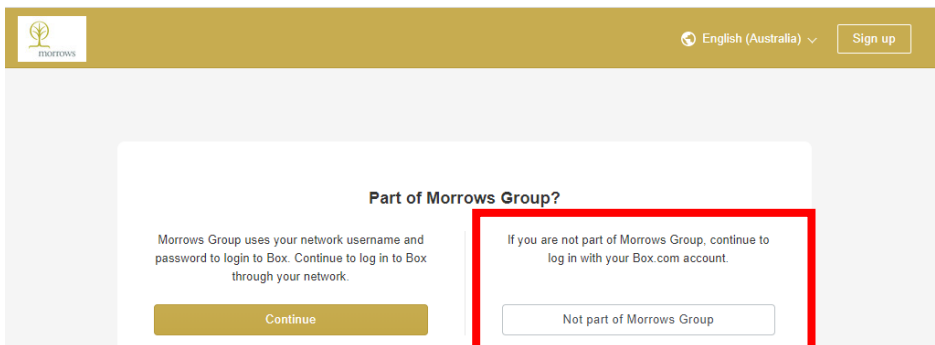
Step 1 – Box invite

You will receive an invite from Morrrows (either from Neil Yeoman- Director) or from your Morrrows Client Service Coordinator.

Please click on **“Accept Invite”**



Choose the option **“Not part of Morrrows Group”** as shown below.



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Step 2 – Account set up

Please fill in the Full Name, Password and Confirm Password fields, then click “Submit”.

Note that the email address is pre-filled and should not be changed.

If you require a change or to add an email recipient, please reach out to your Morrows Client Service Coordinator.

Signup for a Box account to accept invite

Full Name
Full Name

Email Address
[Redacted]

Password
Pas

Confirm Password
Confirm Password

Phone Number (optional)

Submit

By submitting this form, you confirm that you agree to our [Terms of Service](#) and the processing of your personal data as described in our [Privacy Policy](#).

Step 3 – Confirmation Email

A confirmation email will be sent to your Inbox. Please click “Verify Email”

box

Verify your email to start using Box

Welcome to Box! Just verify your email to get started. We do this as a security precaution to verify your credentials.

Verify Email

If you did not sign up for Box, or believe an unauthorized person has signed up using your email address, **please contact Box Support**.

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Step 4 – You will automatically be brought to the Folder assigned to you

All Files ▾

Name

 Client Area

Please email your Morrows Advisor or Client Service Coordinator should you require us to provide access to your folder to others.

Please notify us immediately if you wish to remove access for anyone previously provided access.

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2. Signing In (Post - Initial Setup)

In this section we will show you how to sign into your Box account after your initial set up.

If you have forgotten your password please see the section 9 of this guide on resetting your password.

Step 1 – Using any browser, go to: <https://account.box.com/login>

Step 2 – Enter your email address and click “Next”

Sign In to Your Account

Email Address

Enter Your Email

Next

Step 3 – Enter password and click “Log In”

← **Sign In to Your Account**

Signing in as Not you?

Password

Enter Your Password

Log In



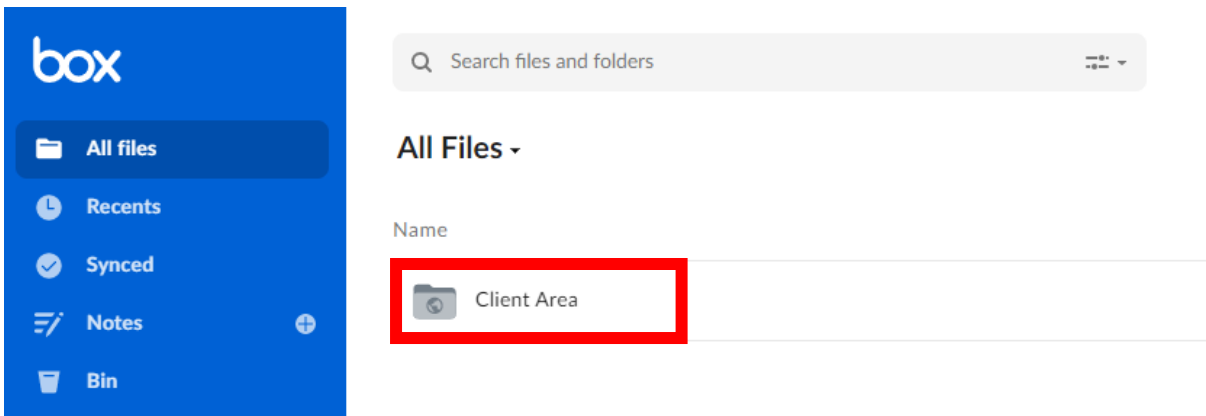


3. Uploading Documents

In this section we will detail how to upload documents into Box directly from a file saved onto your computer. Once a document has been uploaded your Morrows Advisor or Client Service Coordinator will be notified and can action your document accordingly.




Please note that anything you upload can be accessed by your Morrows Advisor or Client Service Coordinator

Step 1 – Click on the Folder “Client Area”



The below Folders will appear:

All Files > Client Area CLIENT SHARED

| Name | |
|--|---|
|  My Important Items | Important documents you want to save for future reference. Keep in mind these documents are also visible to us. |
|  My Uploads | Documents you upload for our attention/use e.g. source documents to complete tax work, etc. |
|  Morrows Uploads | Documents we upload for your attention/reference e.g. Notice of Assessment, etc. |

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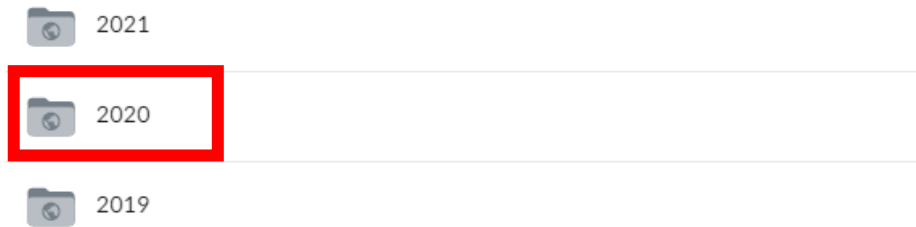


Step 2 – Click on the appropriate Sub-Folder (e.g. My Uploads if you want to upload a document to us)

Choose the folder your documents relate to e.g., source documents to complete 2020 Income Tax Returns

All Files > Client Area > My Uploads CLIENT SHARED

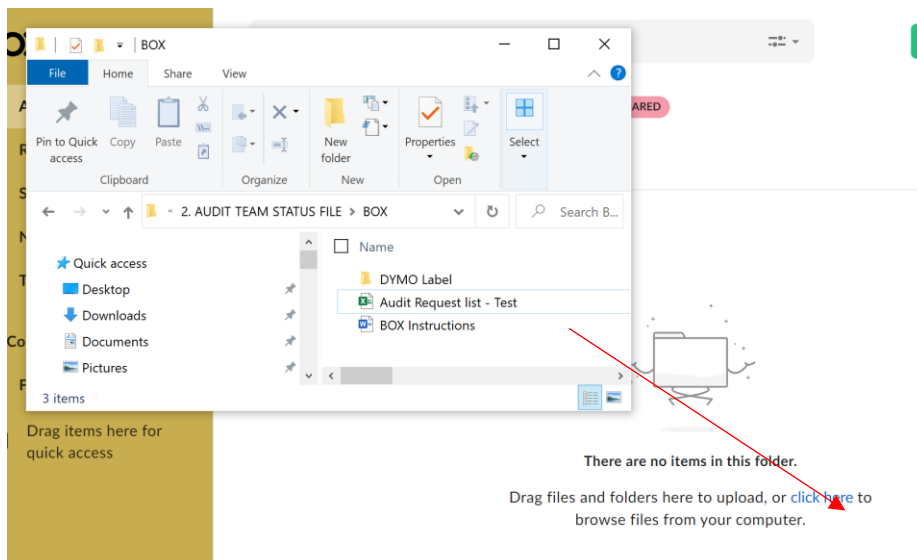
Name



*Note: For filing accuracy, please ensure documents are uploaded to the appropriate Financial Year. If required, other Sub-Folders may be added within the respective Financial Year Sub-Folders. This can be done by either Uploading a Folder or Creating a Folder within BOX.
Please refer to "[CREATING NEW FOLDERS WITHIN BOX](#)" section on how to create a Folder in BOX.*

Step 3 – Uploading files or folders to BOX Folder

Option 1 – Drag and Drop file



Option 2 – Browse and select

Click on “Upload” and either select the File or Folder from your Computer

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4. Downloading or Deleting Files or Folders

From time to time you may need to download prepared documents which Morrows has uploaded for you. You may also need to delete or remove files from your Box Drive, such as old documents or if something may have been uploaded in error.

This section will briefly provide the steps to either delete or download files which are stored in your Box account.

Step 1 – Right Click on the File or Folder

Step 2 – Choose either:

Download – To Download a file

Bin – To Delete a file

5. Creating New Folders Within Box

Using folders can you help file documents which can then be easily located in future. You may also want to create folders for projects or events or to group documents you have uploaded. The following section will provide you instructions on how to create folders within Box.

From time to time your Morrows Advisor or Client Service Coordinator may also create a fold for you, such as a new folder for a new financial year.

Step 1 – Click on “New”, then Click on “Folder”

Step 2 – Fill in “Folder Name” and Click “Create”

Create a new folder

Folder name
My new folder

Invite people Shared with BA NY BU +1

Enter email addresses to invite users

Permission
Editor Learn more

Cancel Create

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6. Re-Setting Password

If you cannot remember your password or need to reset your login credentials, please follow these steps:

Step 1 - Open an internet browser

Step 2- Type in URL <https://account.box.com/login>

Step 3- Enter your email

Step 4 -Click Reset Password

Step 5- Follow the onscreen instructions to rest your password

