



# RelaNet Cloud Quick Start

A brief guide to using RelaNet Cloud for the first time

# Table of Contents

- Introduction..... 3
- Activating Your Account..... 4
  - Your Relanet Cloud Invitation..... 4
  - Setting Your Password..... 5
  - Your Initial Login..... 6
- Logging Into Relanet Cloud..... 7
  - Opening Relanet Cloud..... 7
  - Logging In..... 8
- Exchanging Files..... 9
  - Receiving Files..... 10
  - Sending Files..... 12
- Frequently Asked Questions..... 13
  - What Is My Username?..... 13
  - How Do I Reset My Password?..... 13
  - What If I Didn't Receive My Invitation?..... 13
  - How Can I Get More Help?..... 13

## Introduction

RelaNet Cloud is a service RelaNet provides to financial professionals like accountants, tax preparers, and bookkeepers which allows you to safely and securely exchange files that contain personal identifiers (like Social Security numbers), financial data, and other sensitive information. All files stored within RelaNet Cloud are encrypted in order to protect them from unauthorized access. The financial professional that you are working with has asked you to use RelaNet Cloud because he or she understands how important it is to secure this information in order to protect your privacy and prevent identity theft.

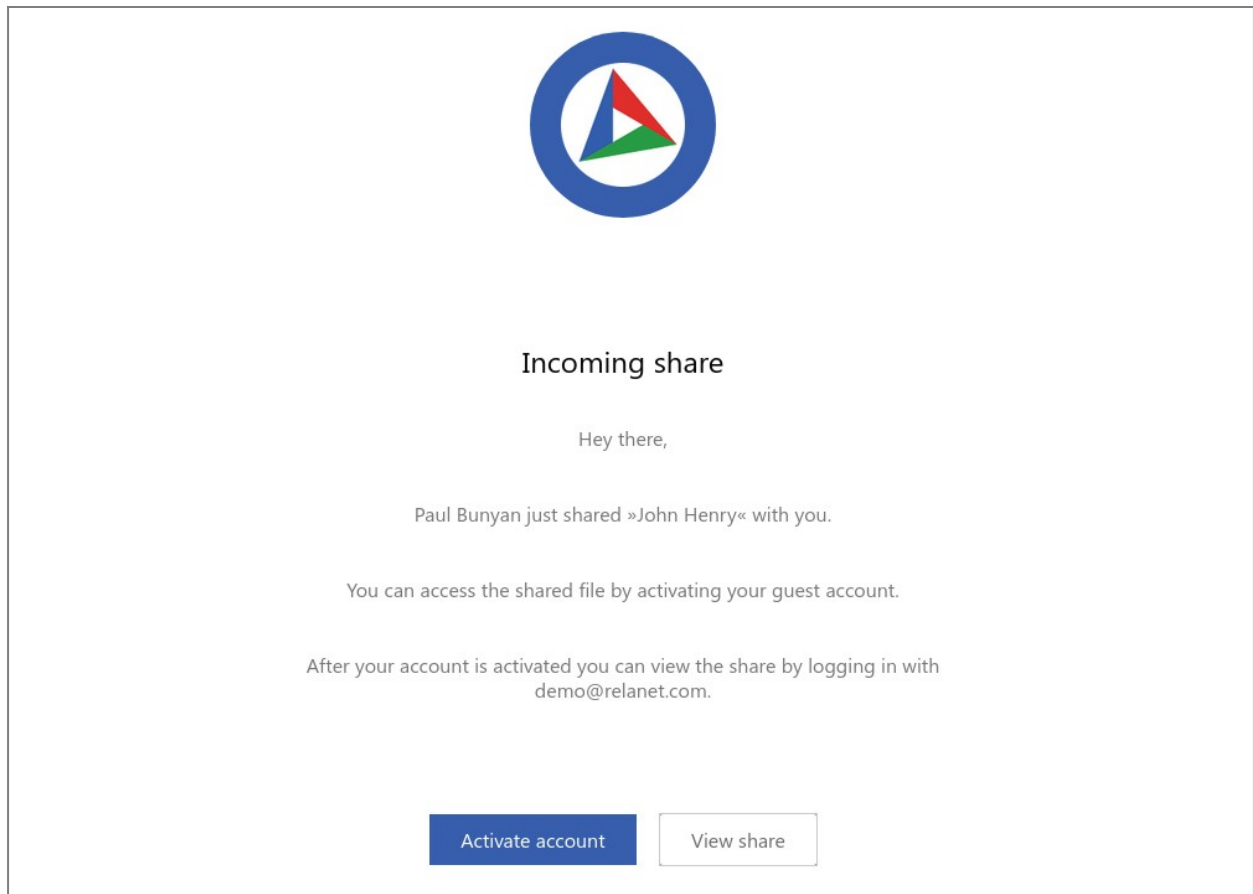
In this document we provide a brief overview of your initial interactions with RelaNet Cloud. We discuss how to log into your new account, how to set your password, and how to exchange files. We hope that this illustrated guide will make it easier to work with RelaNet Cloud and safely exchange information.

## Activating Your Account

Before you can access RelaNNet Cloud and use it to exchange files, the financial professional that you are working with will need to create an account for you, and you will need to activate that account.

### Your RelaNNet Cloud Invitation

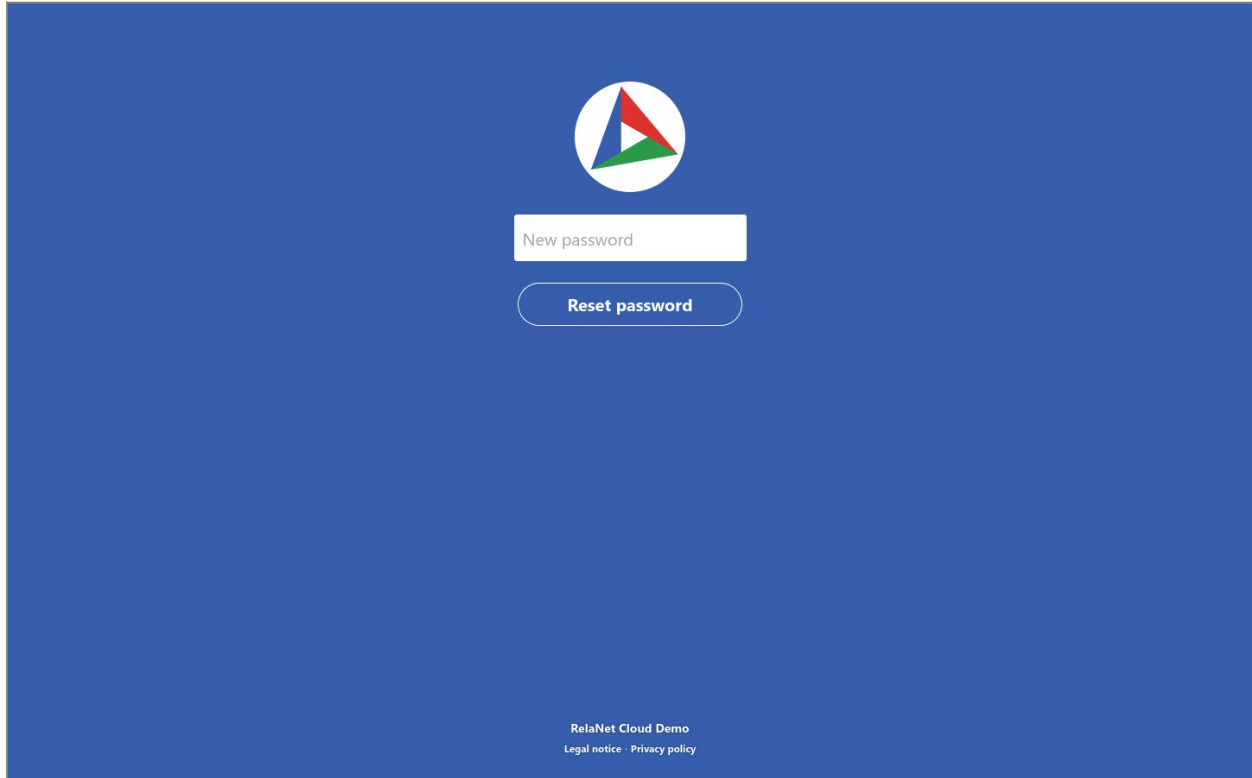
After your account is created, you will receive an invitation via email. The invitation you receive should look something like the image below.



Once you receive your RelaNNet Cloud invitation, click on the *Activate account* button located towards the bottom of the email. This will open RelaNNet Cloud in your default web browser, and allow you to set your password.

## Setting Your Password

After you click on the *Activate account* button in your RelaNNet Cloud invitation, you will be taken to a screen where you can set your RelaNNet Cloud Password.

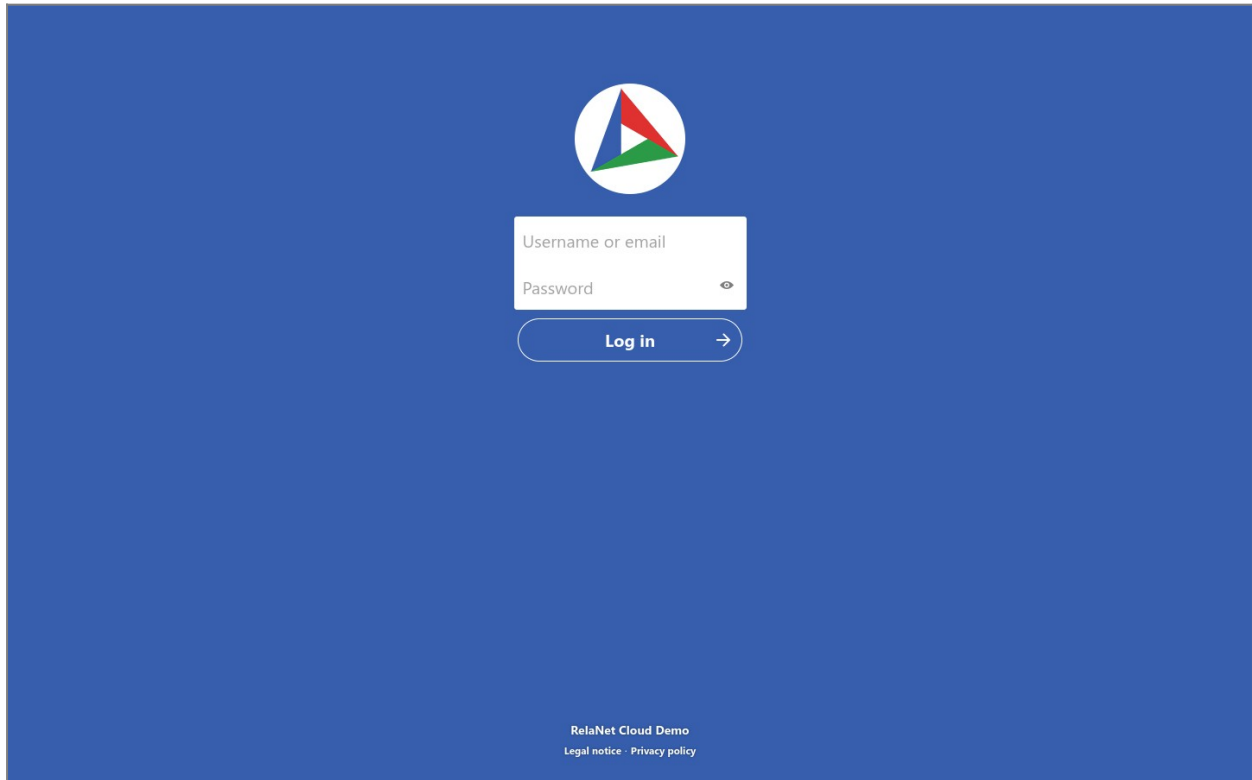


To set your password, choose a password, enter it into the *New password* text box, and then click the *Reset password* button.

When choosing your password, please be aware that it will need to meet certain requirements that have been established to ensure the security of RelaNNet Cloud. Your password must be at least 10 characters long, and must contain at least one upper case letter, one lower case letter, and one number. Your password must also not appear on lists of commonly used passwords, or lists of compromised passwords.

## Your Initial Login

After you set your password, you will automatically be taken to the initial login screen, where you can log into RelaNNet Cloud for the first time.



To log into RelaNNet Cloud, enter the email address that your RelaNNet Cloud invitation was sent to as well as the password that you chose, and then click on the *Log in* button.

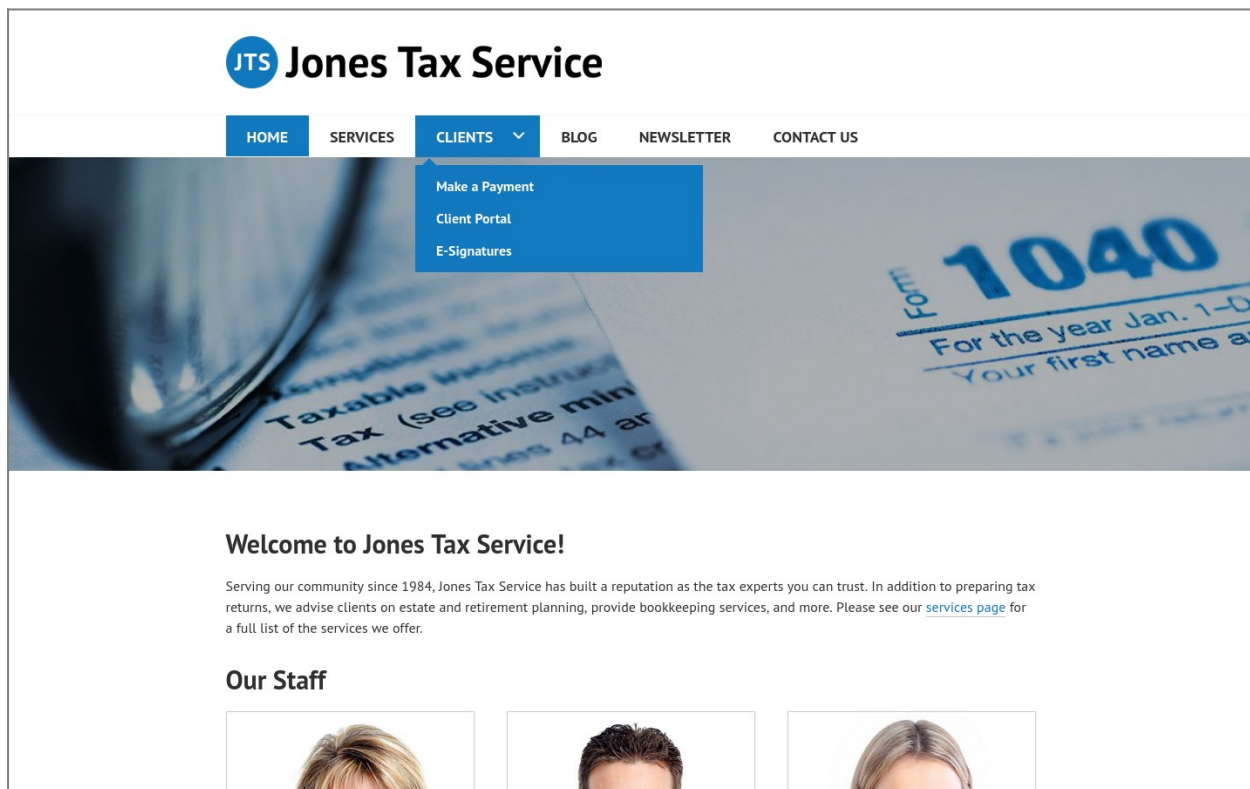
After logging in, you will be taken to the Files area of RelaNNet Cloud. (For more information about using RelaNNet Cloud, see *Exchanging Files*.)

## Logging Into RelaNNet Cloud

The first time that you log into RelaNNet Cloud, you will need to log in using the procedure detailed in the *Activating Your Account* section. That procedure only needs to be completed once, however. After that, you can log in using just your email address and password.

## Opening RelaNNet Cloud

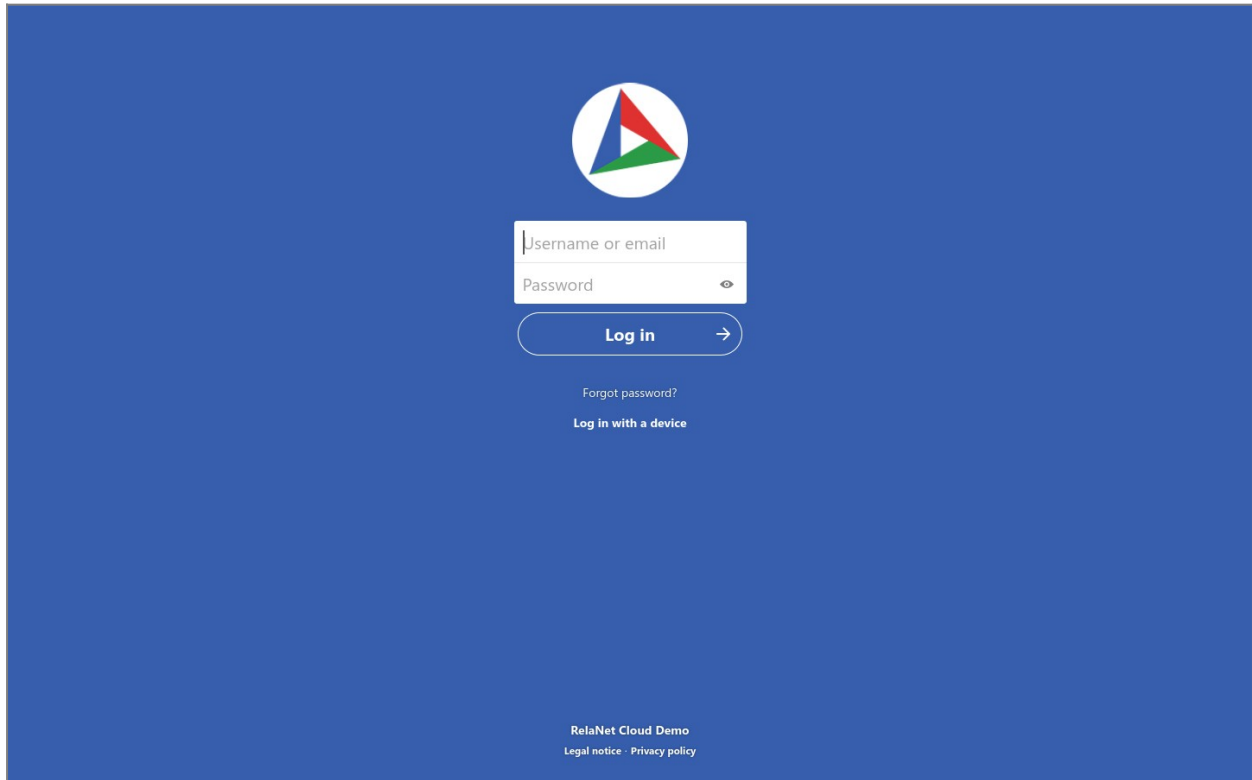
Before you can log into RelaNNet Cloud, you must first open it in your web browser. To open RelaNNet Cloud, visit your financial professional’s website, and look for a “Client Portal” link in the website’s main menu.



Your financial professional’s website will probably look different than the image above, and the menu might be in a slightly different place, but once you find the main menu, you should also find the “Client Portal” link. Once you find that link, click on it to open RelaNNet Cloud.

## Logging In

When you open RelaNNet Cloud, you may be taken to the log in screen if it has been a long time since you last opened RelaNNet Cloud.



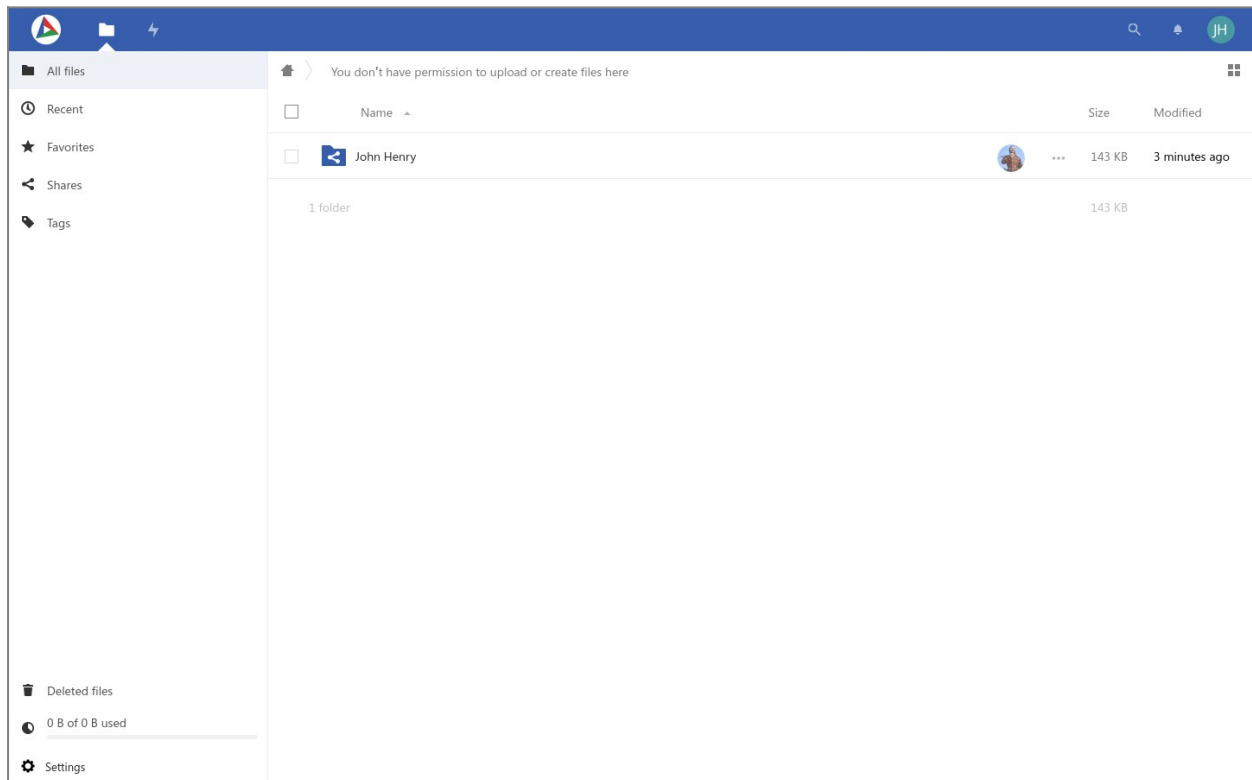
To log into RelaNNet Cloud, enter the email address that your RelaNNet Cloud invitation was sent to as well as the password that you chose, and then click on the *Log in* button.

After logging in, you will be taken to the Files area of RelaNNet Cloud. (For more information about using RelaNNet Cloud, see *Exchanging Files*.)



# Exchanging Files

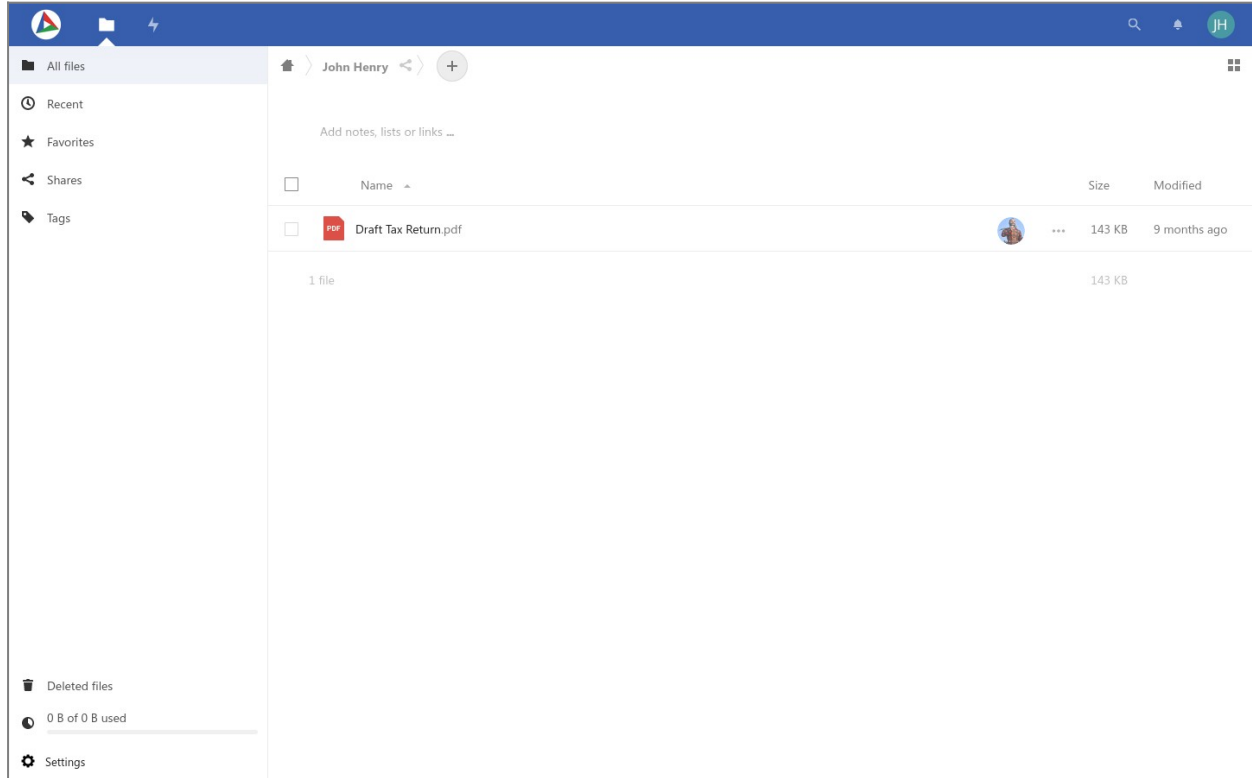
To exchange files with your financial professional, you first need to log into RelaNNet Cloud. (For more information about logging in, see *Logging Into RelaNNet Cloud*.) After logging in, you will be taken to the *Files* area of RelaNNet Cloud.



In the Files area, you should find a folder. (In the image above, the folder is titled "John Henry".) This folder is shared between you and the financial professional that invited you to RelaNNet Cloud. Any files placed in that folder will be visible to both parties.

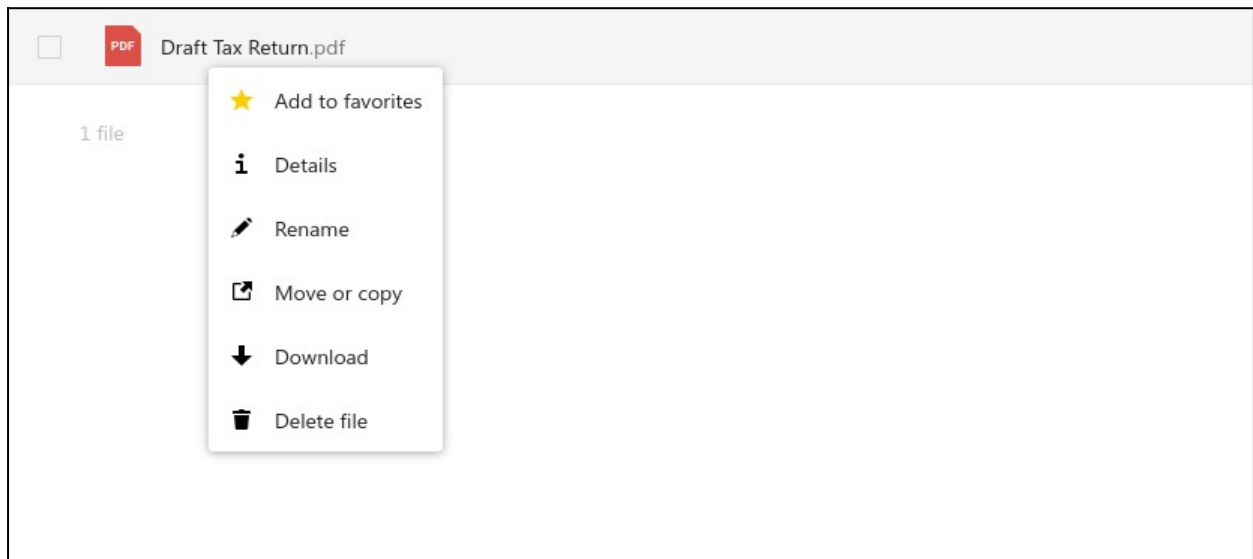
## Receiving Files

To receive files from your financial professional, open your shared folder by clicking on it.



Once your shared file is open, all the files in that folder will be displayed. (In the image above, the shared folder contains only one file called “Draft Tax Return.pdf”.)

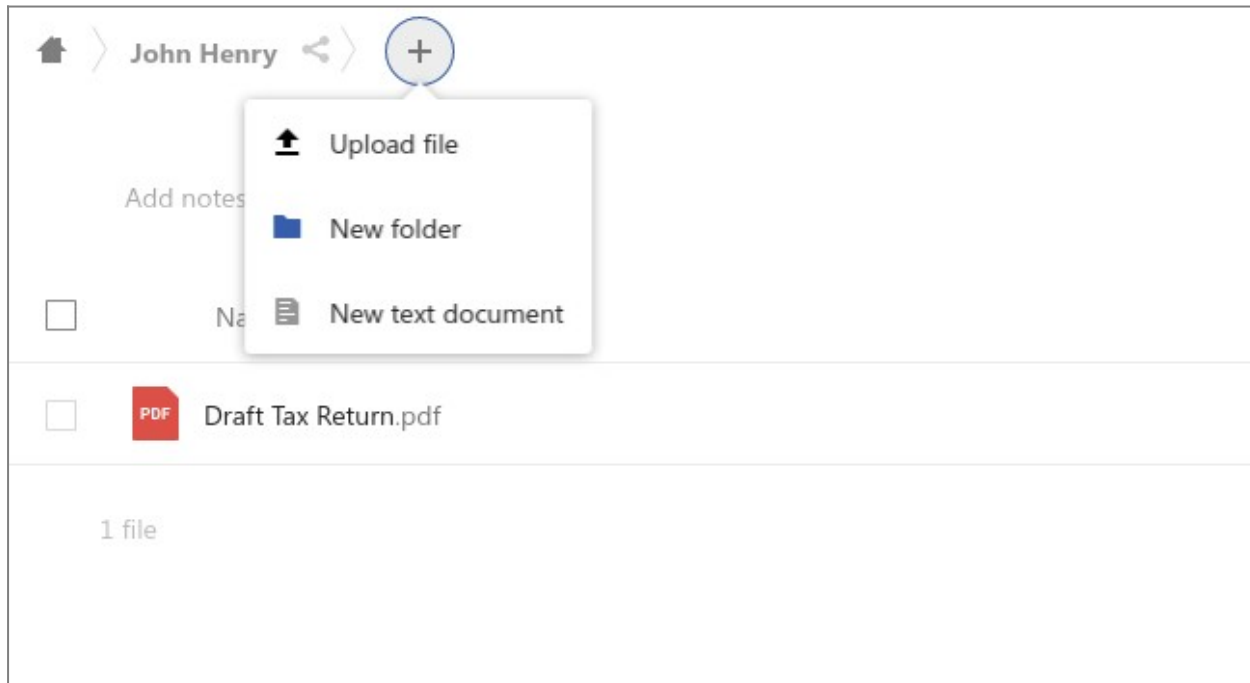
To download a file, right on the file to open its action menu. Then click on the *Download* option in the file's action menu.



After clicking on the *Download* option your web browser may prompt you to ask where you would like to save the file, or the file might be automatically downloaded to your downloads directory.

## Sending Files

To send files to your financial professional, open your shared folder by clicking on it. Then click the *Plus* button towards the top of the screen. This will open the button's action menu. Select the *Upload file* menu option in the action menu.



Clicking on the *Upload file* option will open your computer's file selection dialog. Select the file that you want to upload from your computer's file selection dialog, and the file will be uploaded to Relanet Cloud. (The details of selecting a file will differ depending the operating system of the computer or smartphone being used.) After the file is uploaded, it should appear in your shared folder.

Alternately, if you are using a laptop or desktop computer, you can find the file that you want to upload in your file system and drag the file's icon to Relanet Cloud in your web browser. The file will be uploaded automatically.

# Frequently Asked Questions

## What Is My Username?

When you log into RelaNNet Cloud, your username is the email address that your RelaNNet Cloud invitation was sent to.

## How Do I Reset My Password?

If you have forgotten your RelaNNet Cloud Password, you can reset it yourself. Open RelaNNet Cloud and look at the login screen. Below the *Log in* button, you will see a link that reads "Forgot password?" Click on that link and you will be able to reset your password to a new value.

## What If I Didn't Receive My Invitation?

If you did not receive an expected invitation to RelaNNet Cloud, there are a few things you can do:

1. Check your "Spam" folder to see if the invitation was saved there.
2. Make sure that you are checking the same email account that your financial professional sent the invitation to.
3. Wait a little longer. Email is usually delivered within seconds of being sent, but sometimes it can take several minutes for an email to be delivered.

If none of these solutions help, contact your financial professional and ask him or her to recreate your account. When the account is recreated, your invitation will be resent.

## How Can I Get More Help?

If you need help using RelaNNet Cloud, please contact the financial professional that created your account. RelaNNet is unable to assist end users who were invited by our customers, so please do not contact RelaNNet directly for support. We apologize for any inconvenience this may cause.