NSA Sync User Guide

This guide walks firm users through setting up clients, managing folders and files, requesting electronic signatures, and customizing the client experience in the NSA Sync portal.

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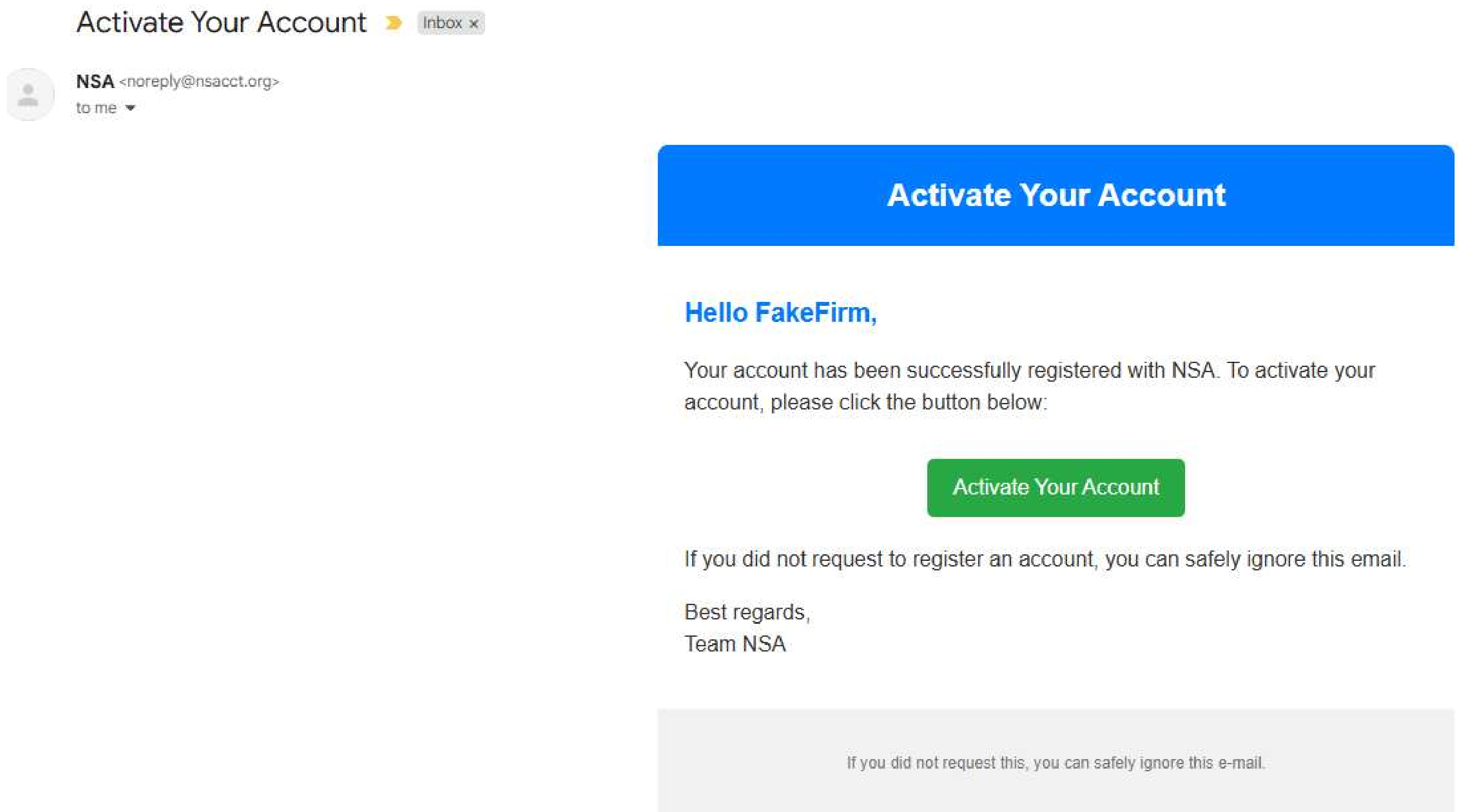
1. Account Activation and First Login

Step 1.1 – Activate Your Account (System Email)

After an NSA staff member creates your NSA Sync user account, you will receive an automated email with the subject line **"Activate Your Account."**

What to do:

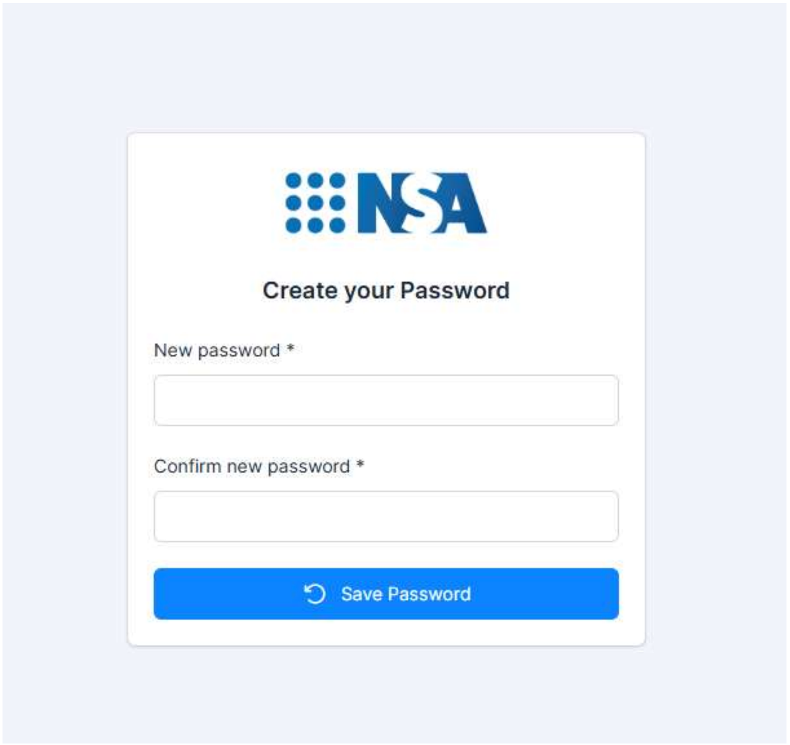
1. Open the email.
2. Click the **Activate Your Account** button.



Step 1.2 – Create Your Password

After clicking **Activate Your Account**, you will be prompted to create a new password.

1. Enter your new password.
2. Click **Save Password**.



Step 1.3 – Log In

After saving your password, you will be prompted to log in.

1. Enter your username/email and password.
2. Sign in to access NSA Sync.

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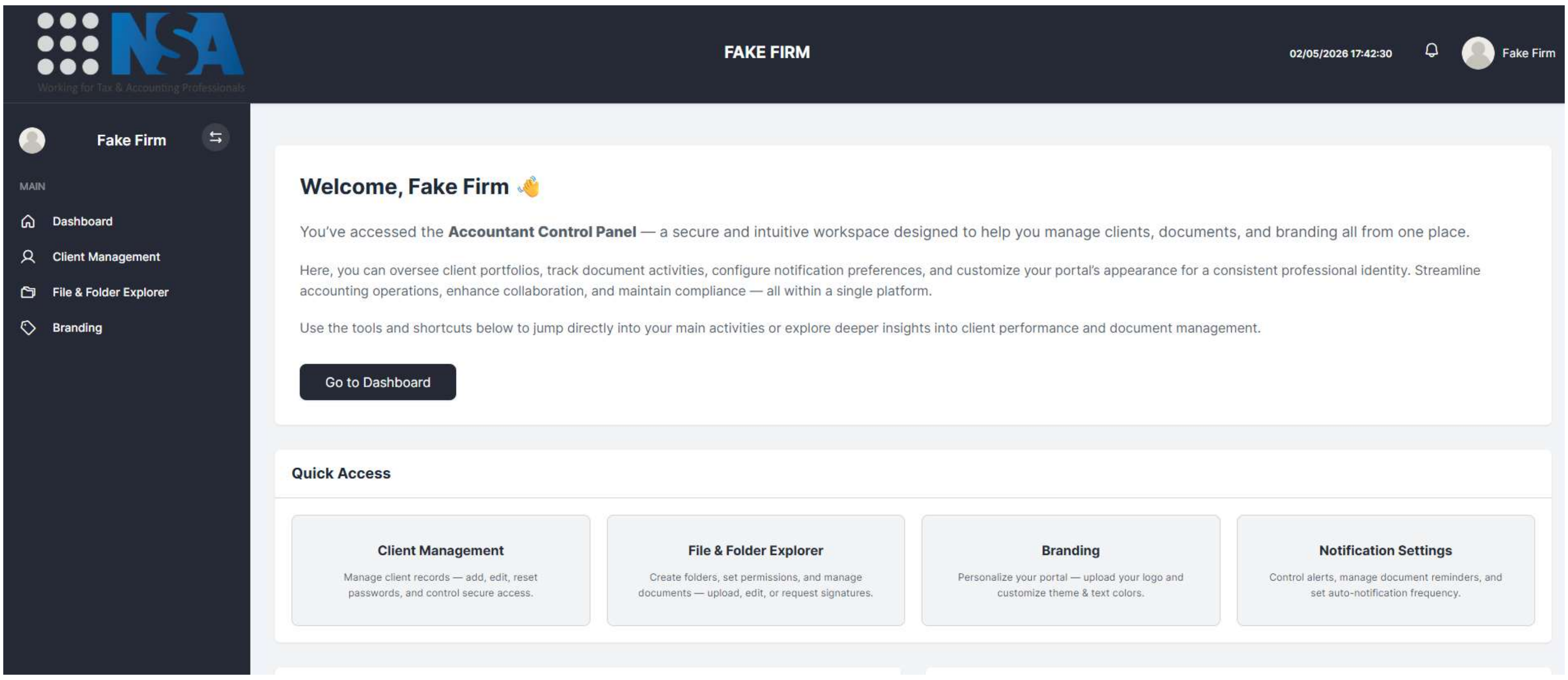
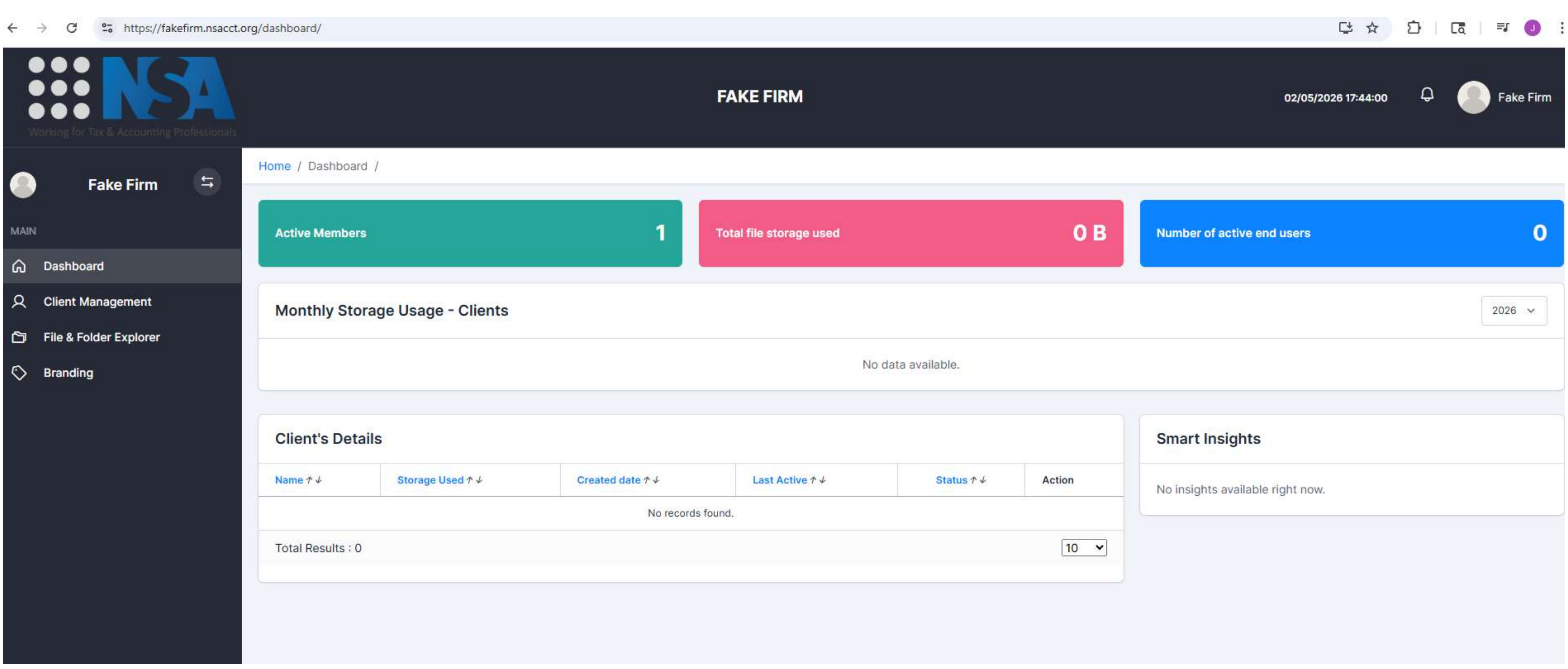
2. Control Panel & Dashboard

After logging in, users land on the **Control Panel**. The Control Panel is the entry point for key tools and settings, and it includes a **Go to Dashboard** button.



Select **Go to Dashboard** to access the main working dashboard, or use the shortcuts to jump directly to Client Management, File & Folder Explorer, Branding, or Notification Settings.



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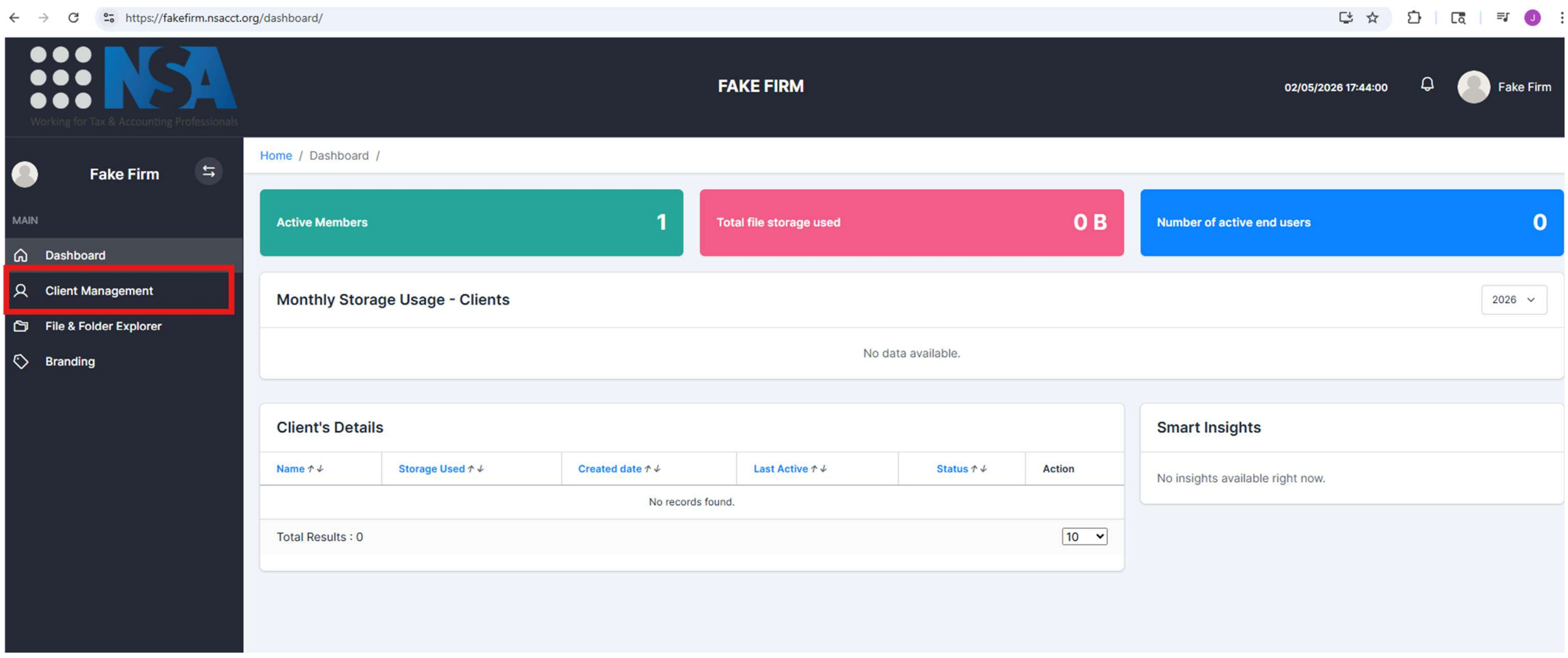
3. Adding a New Client – Once logged in, a good place to start would be adding a client.

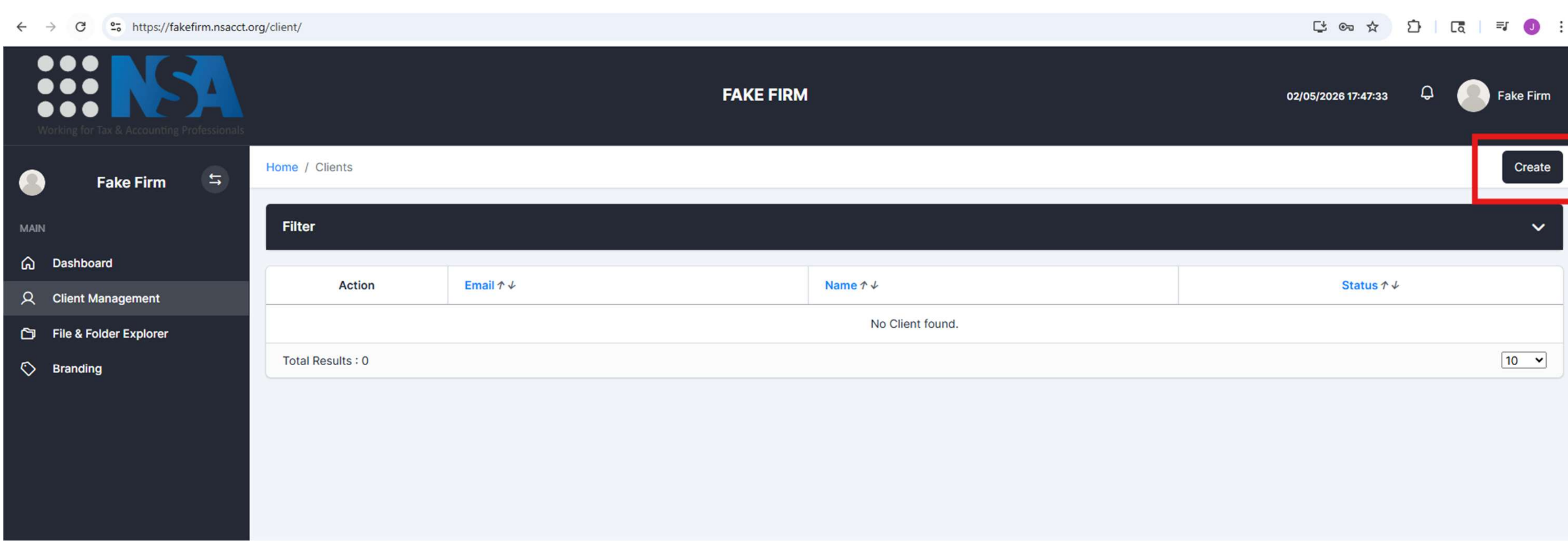
Step 3.1 – Open Client Management

From the left-hand navigation, click **Client Management**.



Step 3.2 – Create a Client

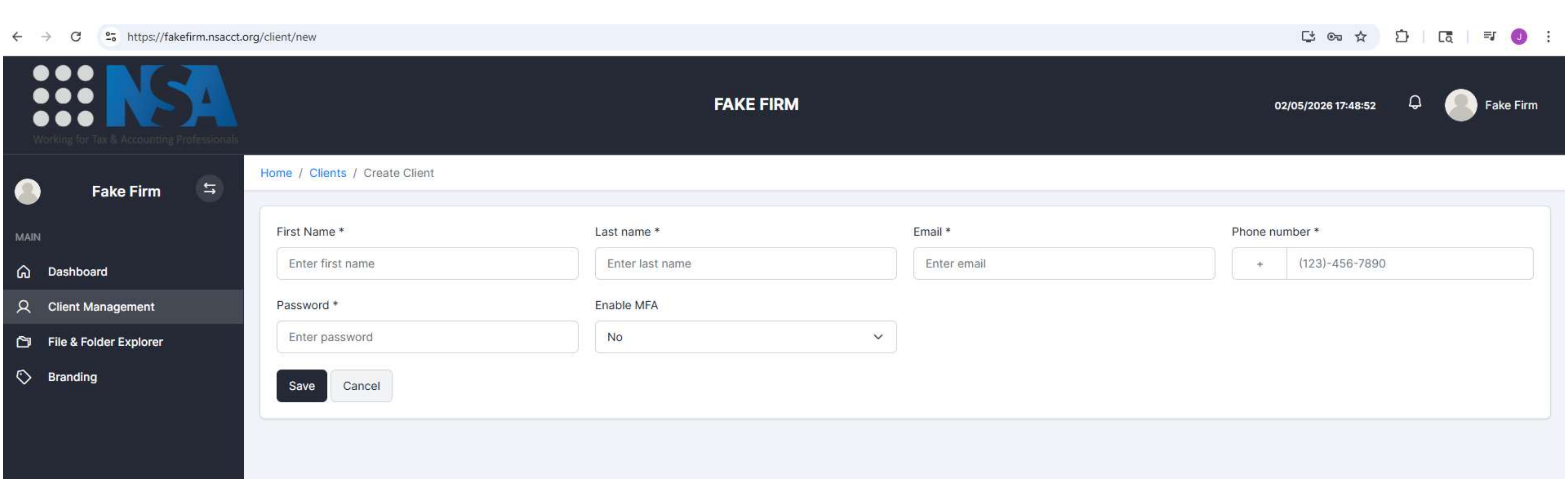
On the Clients screen, click the **Create** button in the top-right corner.



Step 3.3 – Enter Client Information

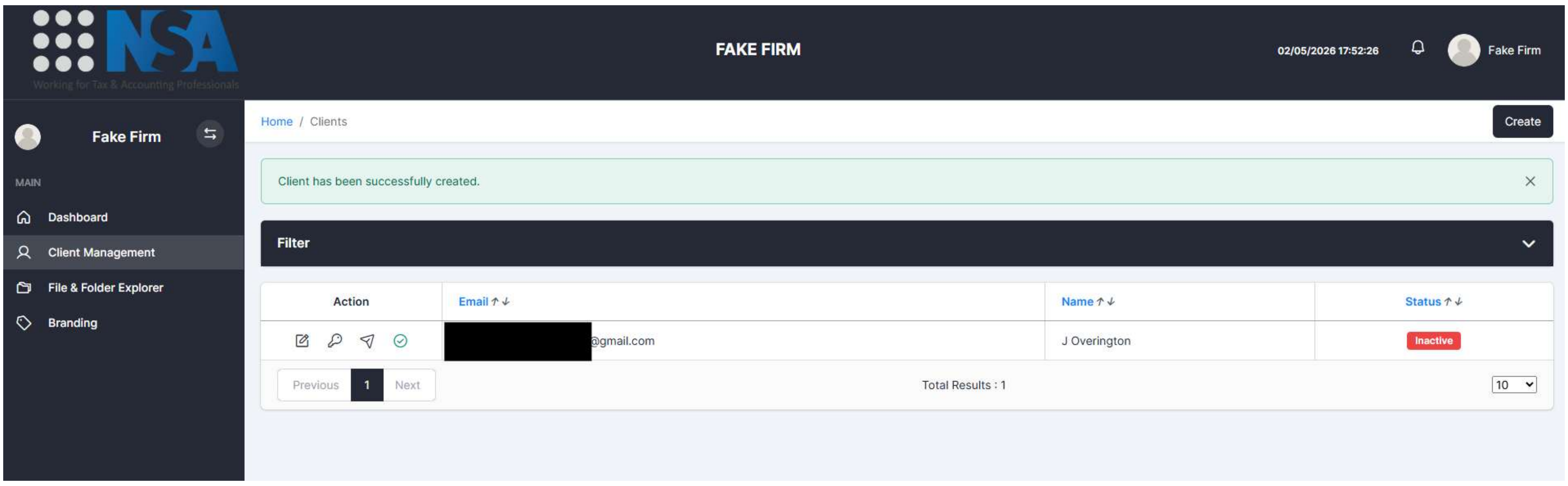
Fill in the client's information:

- First name
- Last name
- Email address
- Phone number
- Temporary password (As a reminder, the client will reset their password upon first login.)
- Enable MFA (two-factor authentication), if desired



Step 3.4 – Client Created Confirmation

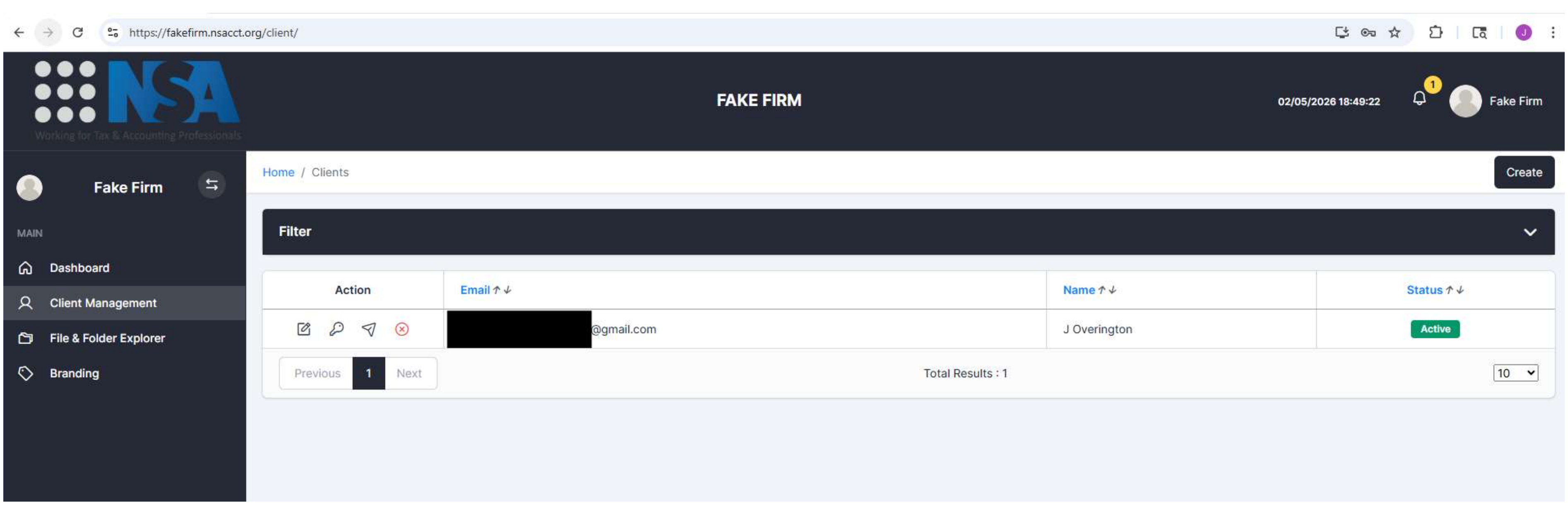
Once saved, the system confirms the client was created successfully.



3.5 Note - Client Activation Status

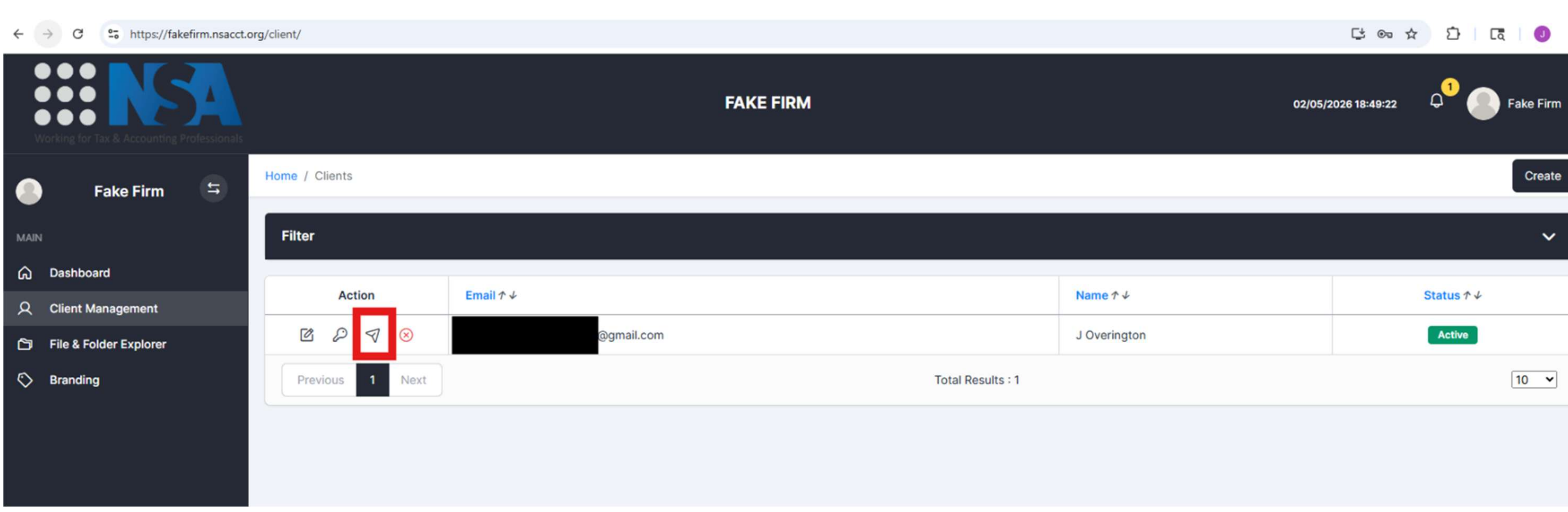
New clients initially appear as **Inactive**. After the client activates their account via the automated email, their status updates to **Active**.

Important: A client must activate their account before folder permissions or signature requests will work.



3.6 Note - Resending Activation / Access Emails

Security tokens do expire for security reasons. If a client's link expires, click the **paper plane (Send Reset Email)** icon to resend.



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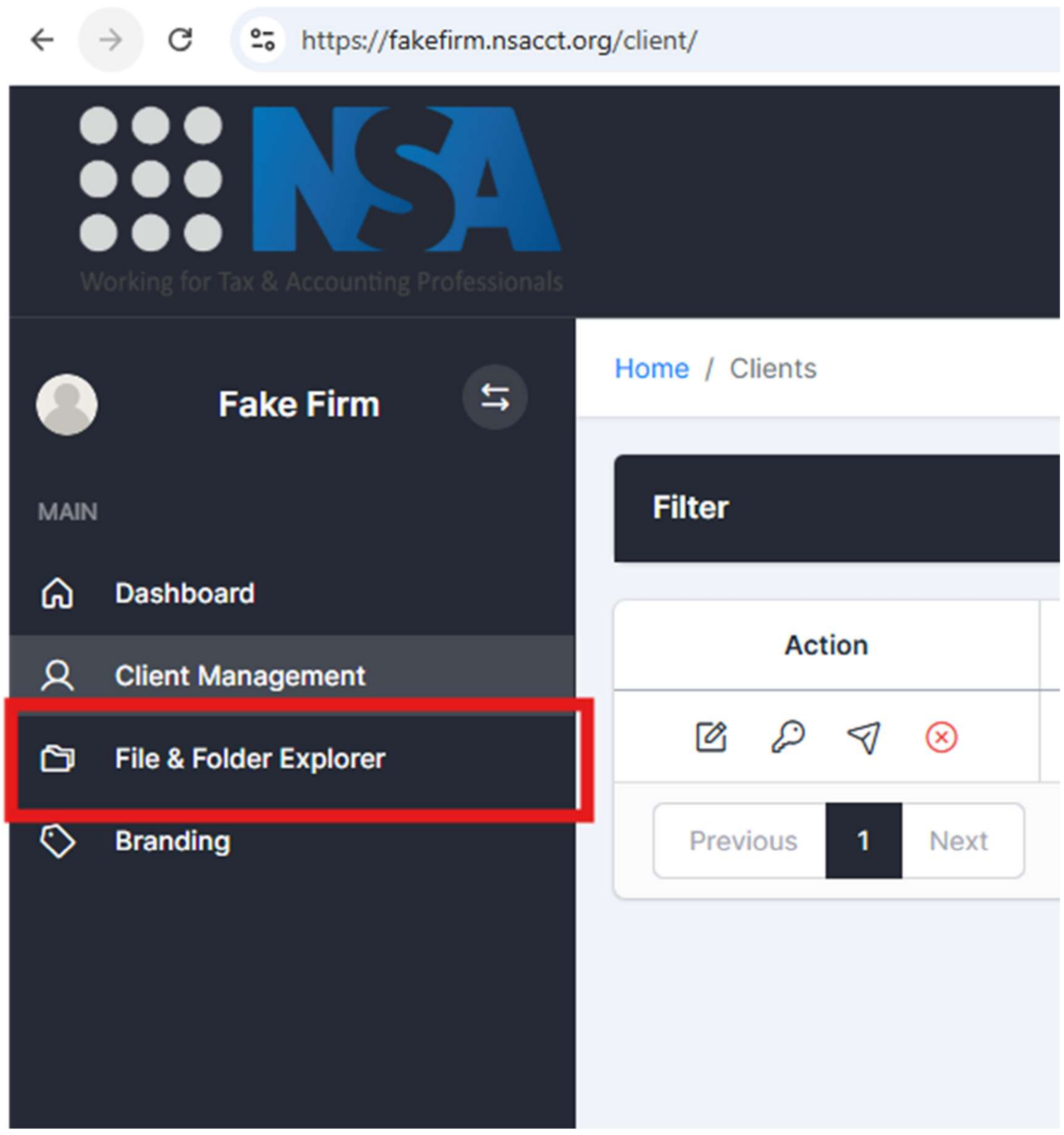
4. Creating Client Folders – Once a client is created, a folder needs to be created and associated with that client.

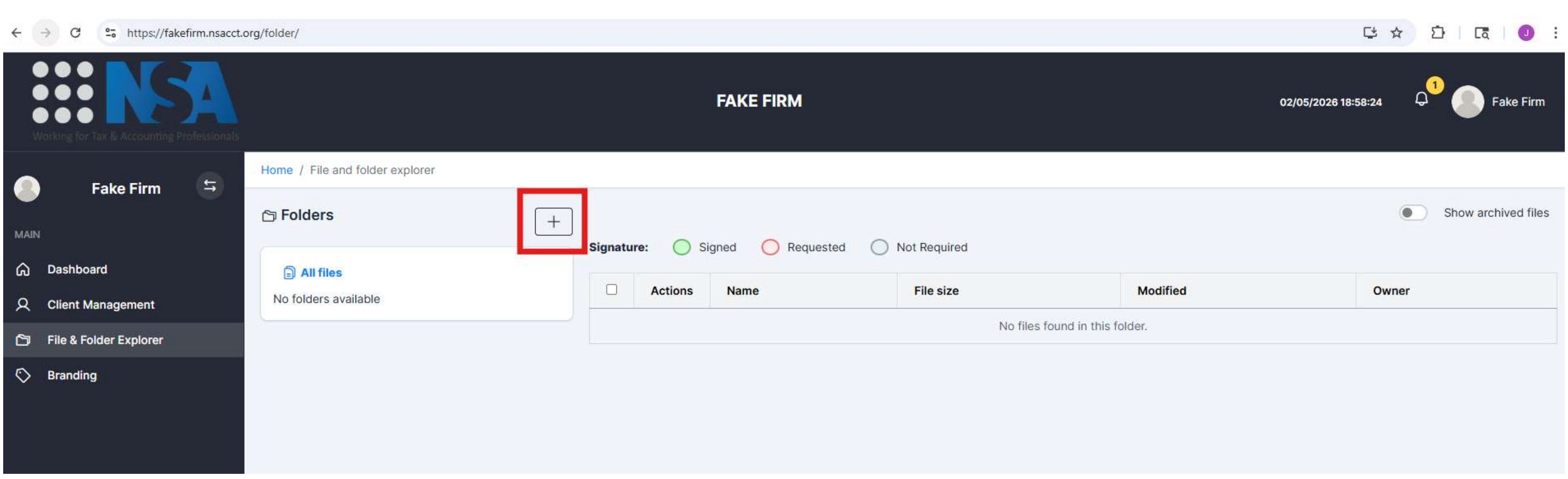
Step 4.1 – Open File & Folder Explorer

Click **File & Folder Explorer** from the left-hand menu.

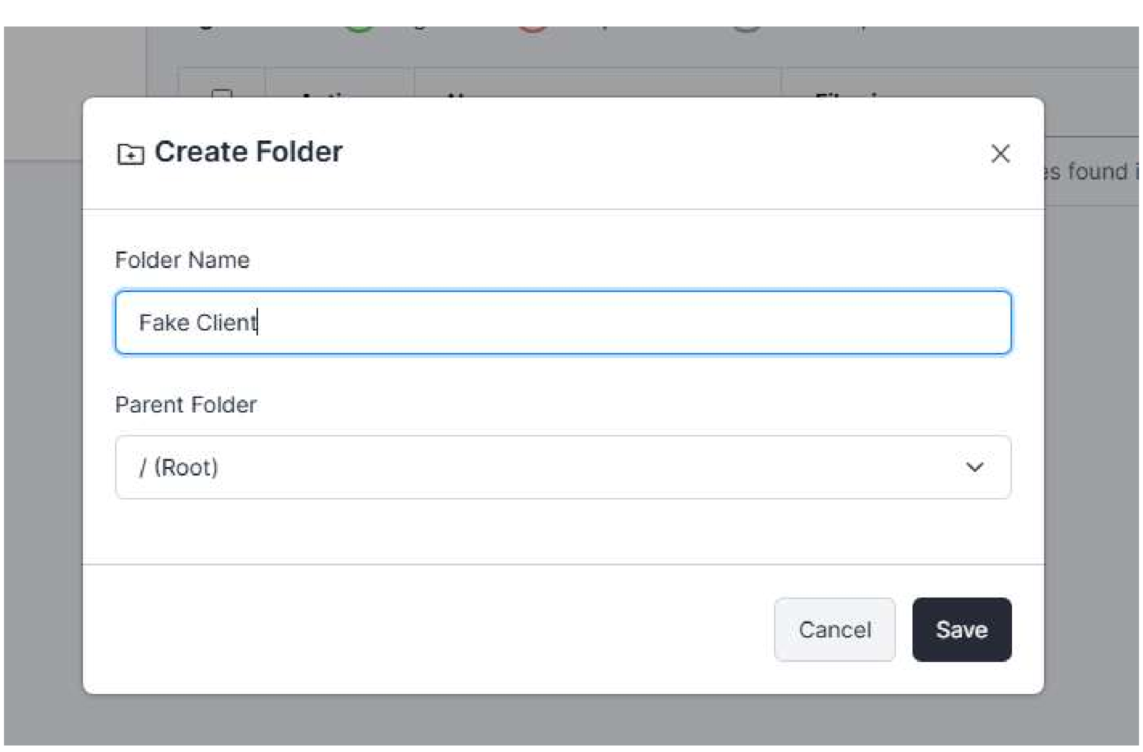


Step 4.2 – Create a Folder

Click the **plus (+)** icon to create a new folder.

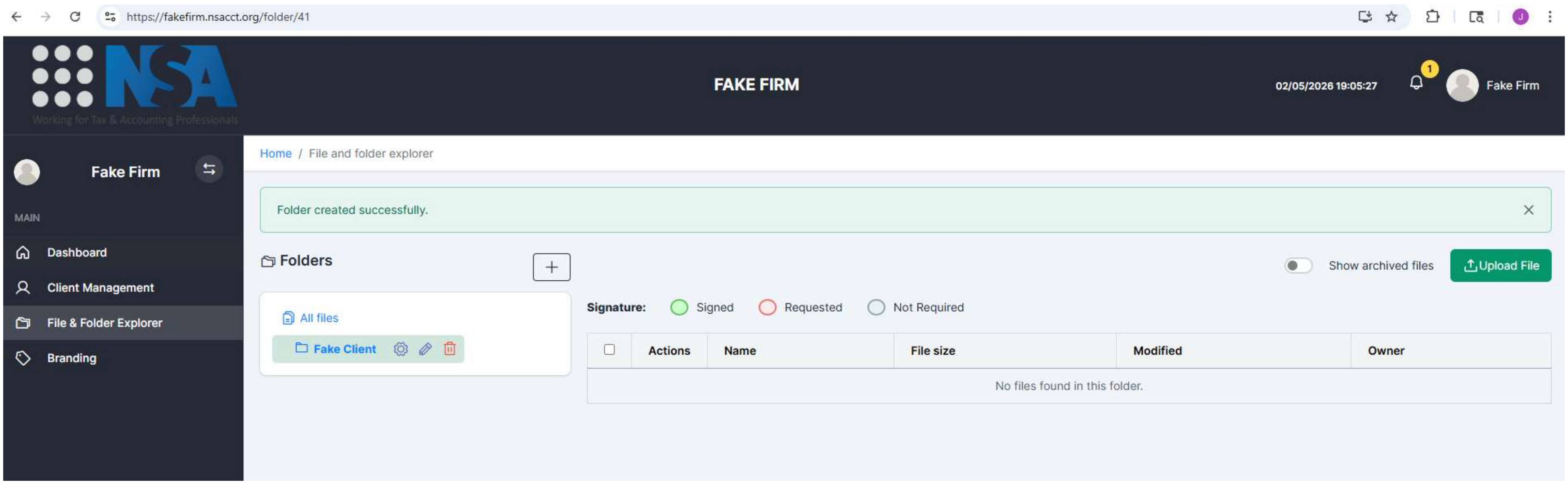


Enter the client's name as the folder name and save.



Step 4.3 – Folder Created

The new client folder appears in the folder list.



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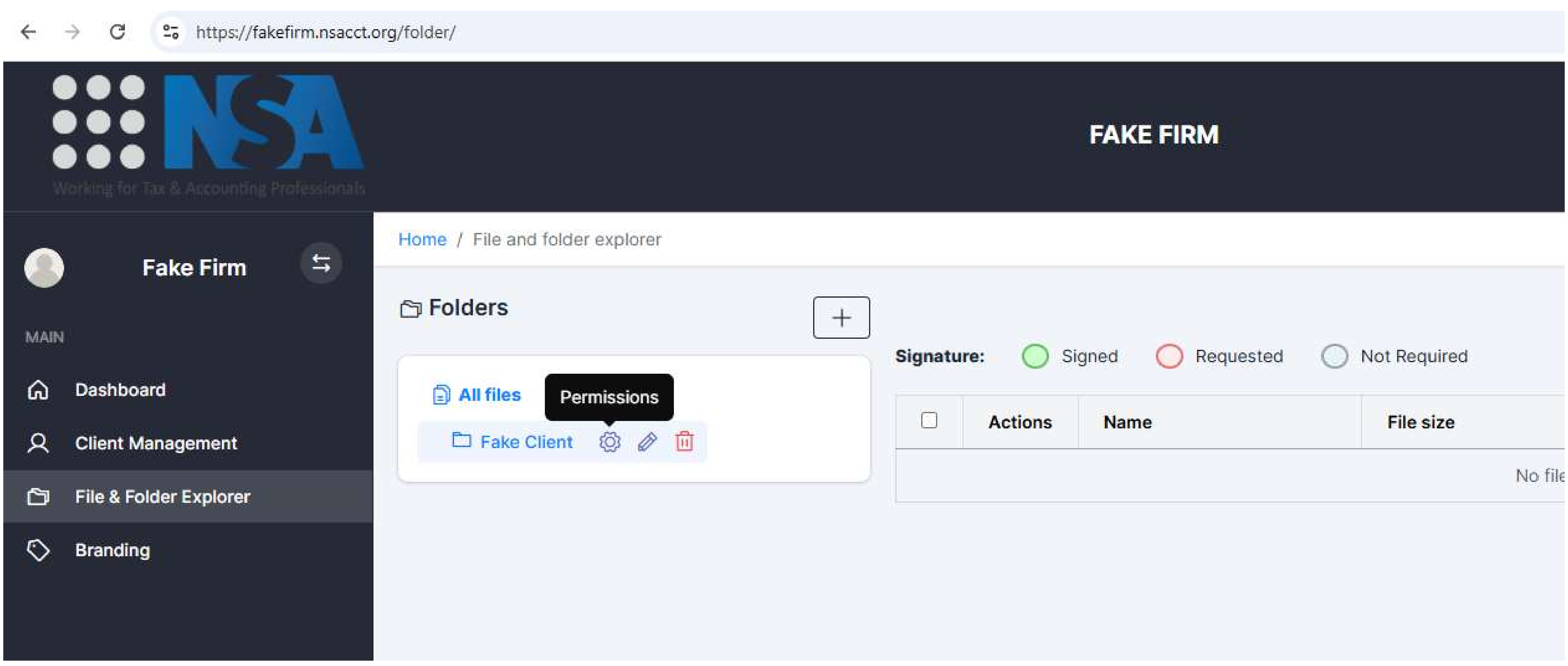
5. Assigning Folder Permissions – Now that the client folder have been created, each client folder requires permissions to be set.

Click the **Permissions (gear) icon** next to the client folder.

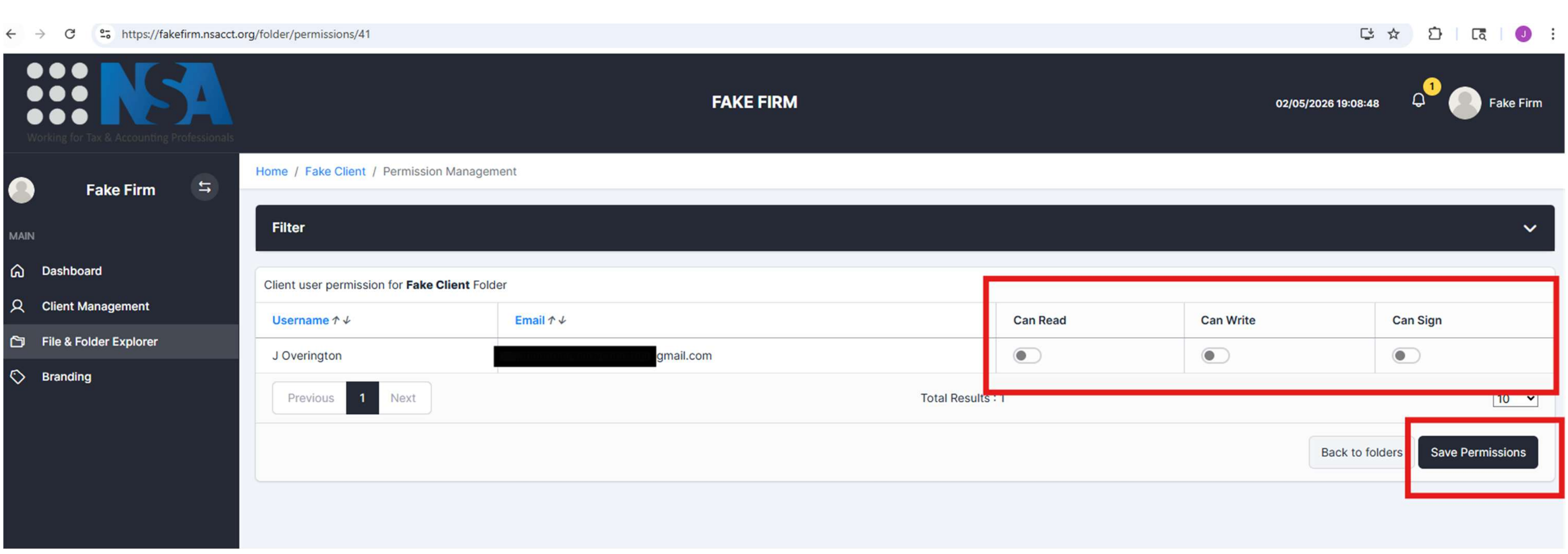


Permission Options

Toggle permissions as needed:

- **Can Read** – Client can view files
- **Can Write** – Client can upload files
- **Can Sign** – Client can electronically sign documents

Click **Save Permissions** when finished.



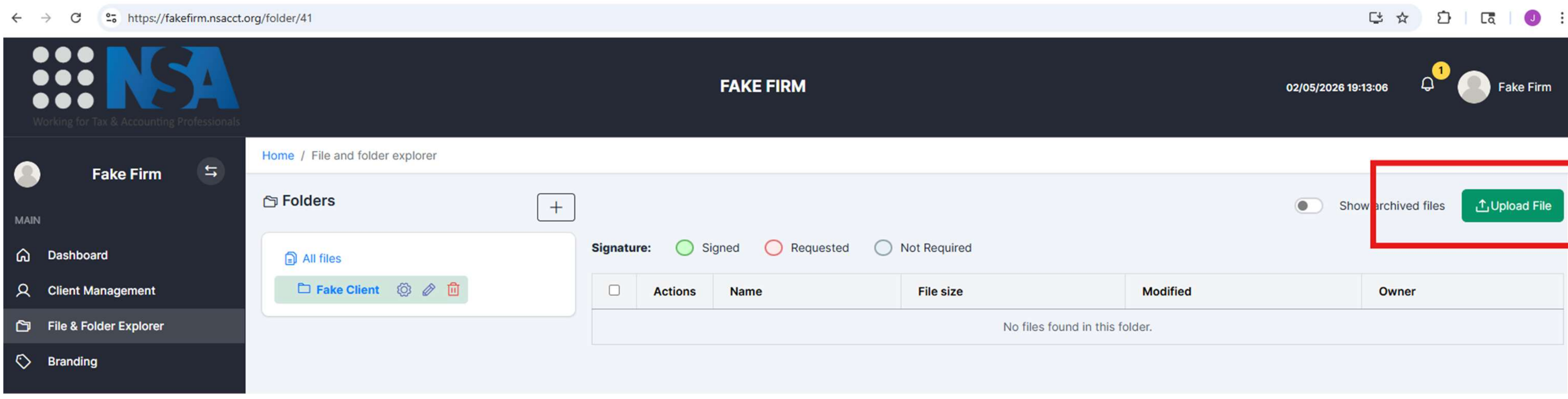
6. Uploading Files – Once a folder is created, users can easily upload documents for Clients to read, edit, and/or sign.

Step 6.1 – Select Client Folder

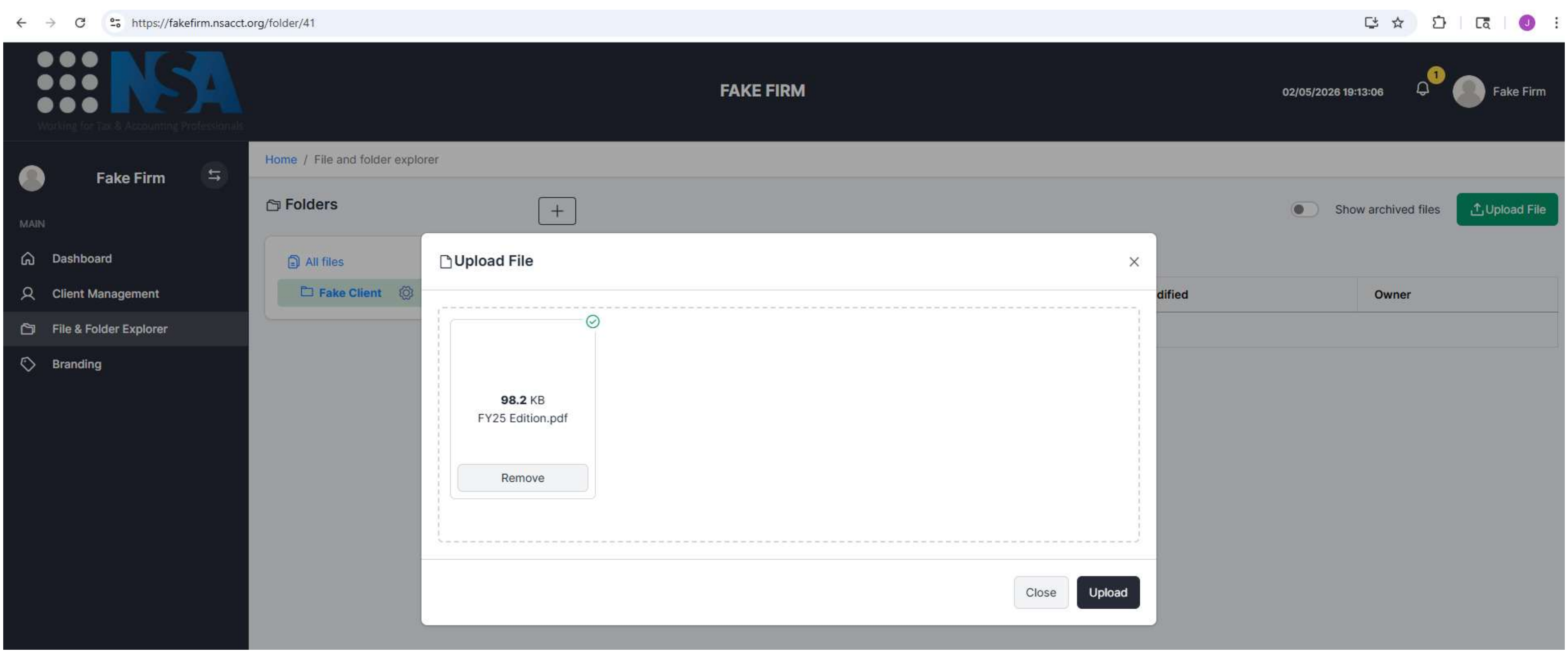
Click the client's folder to make it active.

Step 6.2 – Upload File

Click the green **Upload File** button.

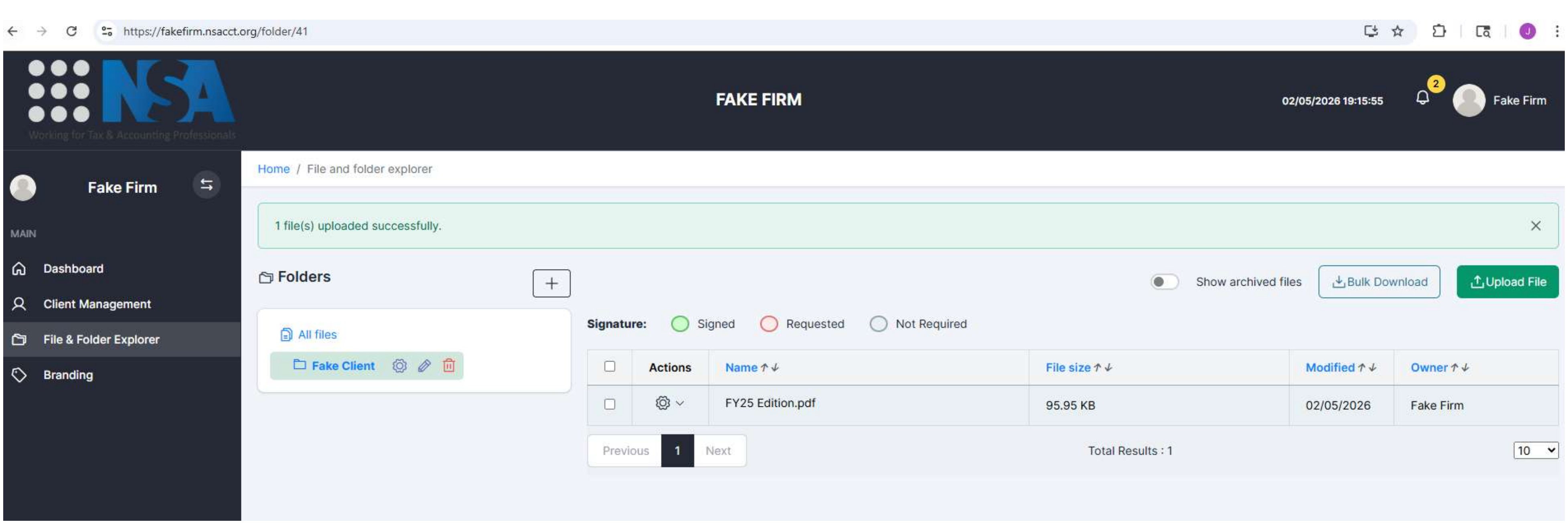


Select the file and click **Upload**.



Step 6.3 – Upload Confirmation

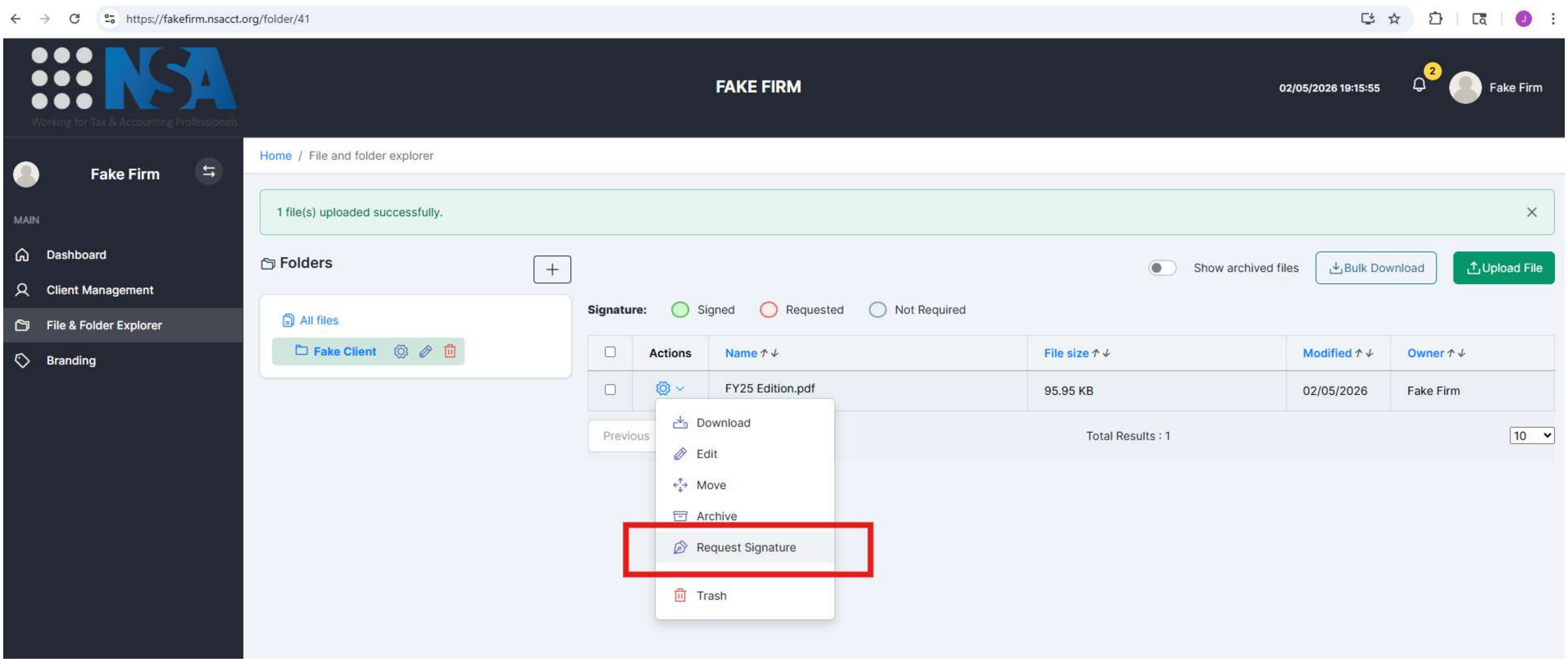
A confirmation message appears, and the file is listed in the folder.



7. Requesting Electronic Signatures

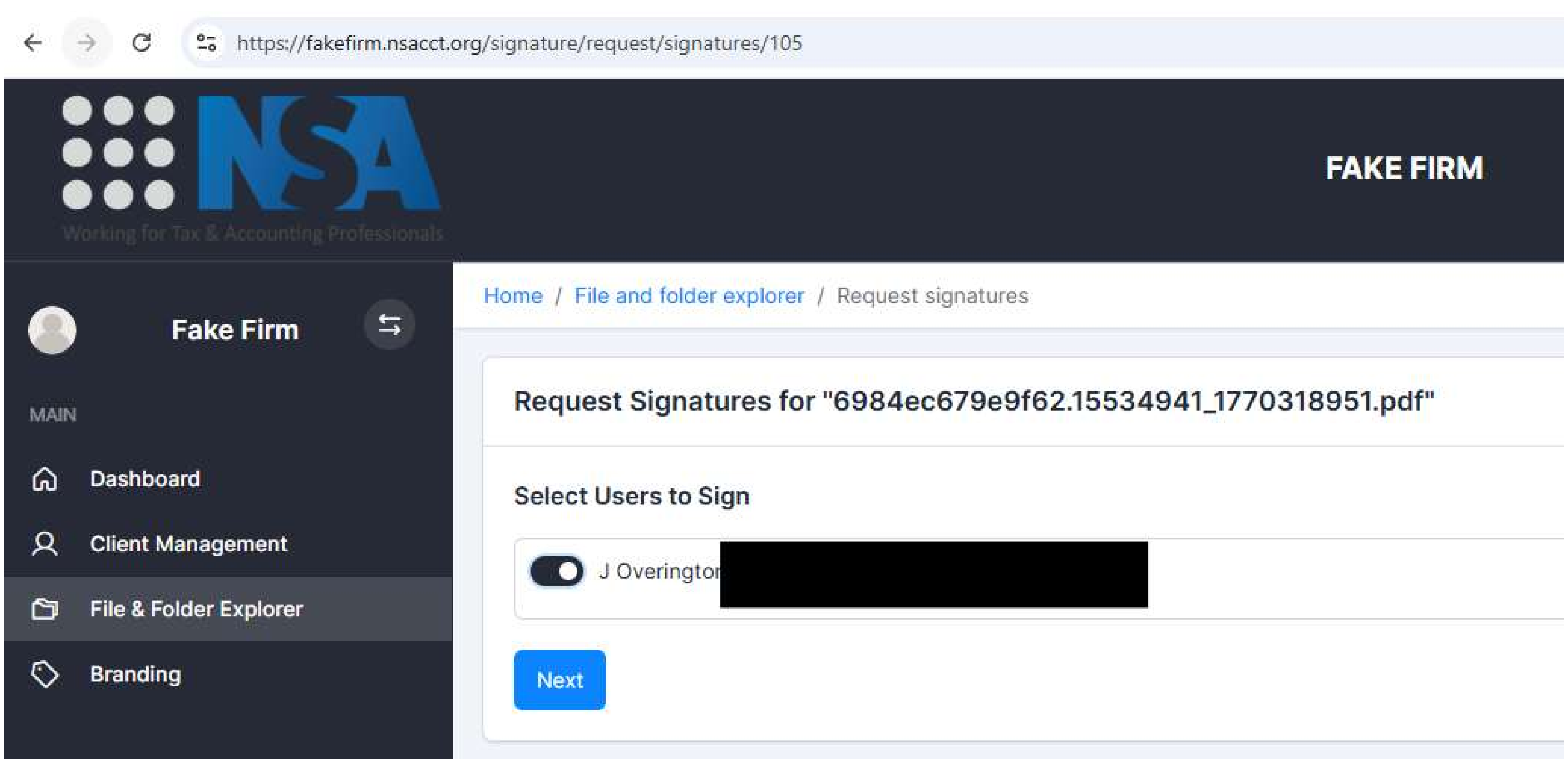
Step 7.1 – Start Signature Request

For documents requiring a signature, click the **gear icon** next to the file and select **Request Signature**.



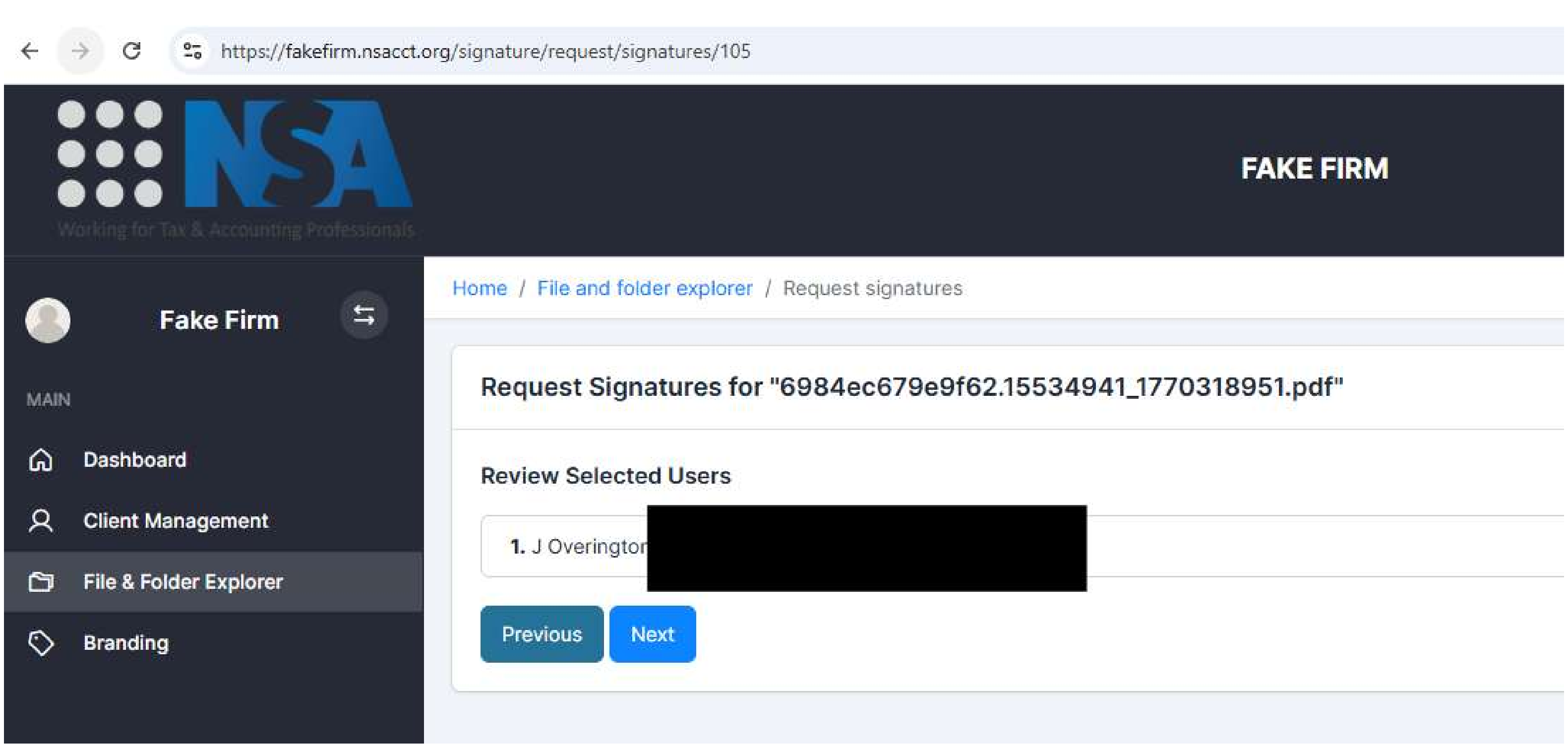
Step 7.2 – Select Signers

Toggle the client(s) who need to sign and click **Next**.



Step 7.3 – Confirm Signers

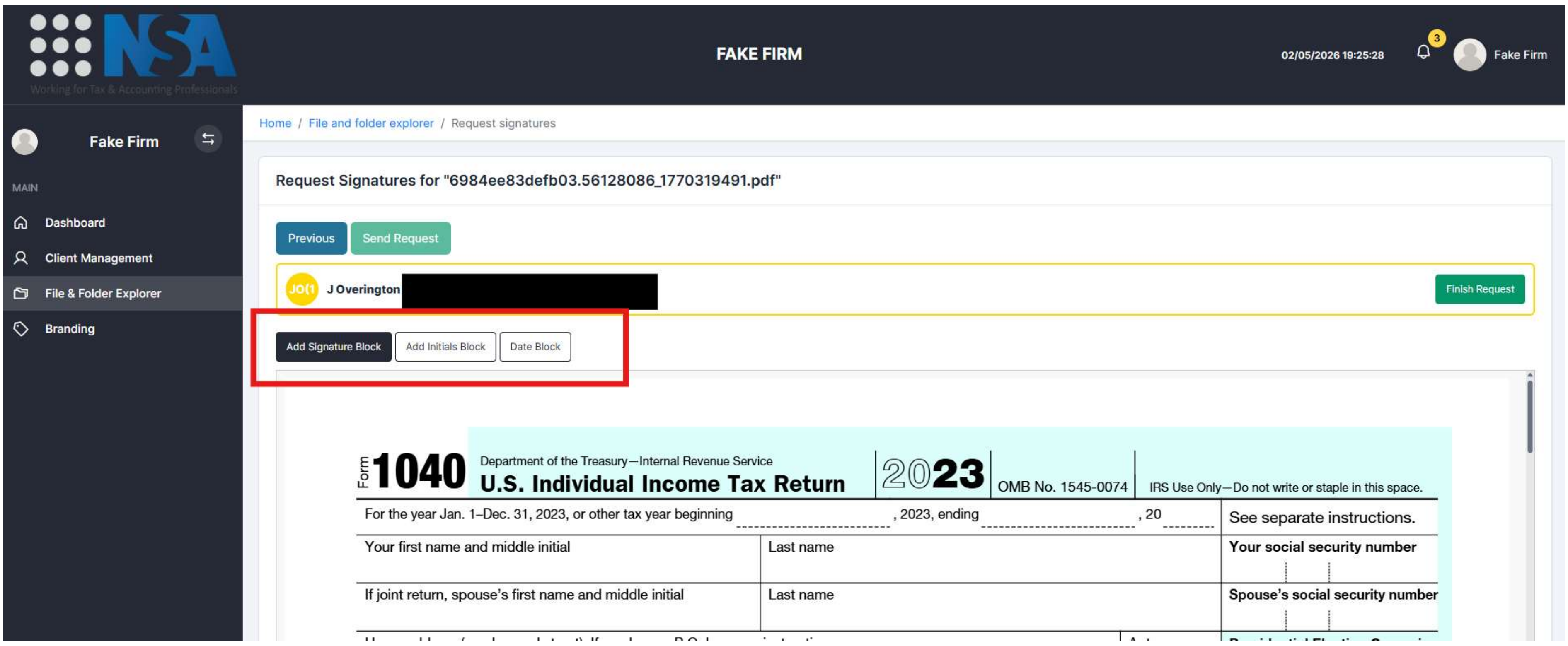
Review the selected users and click **Next**.



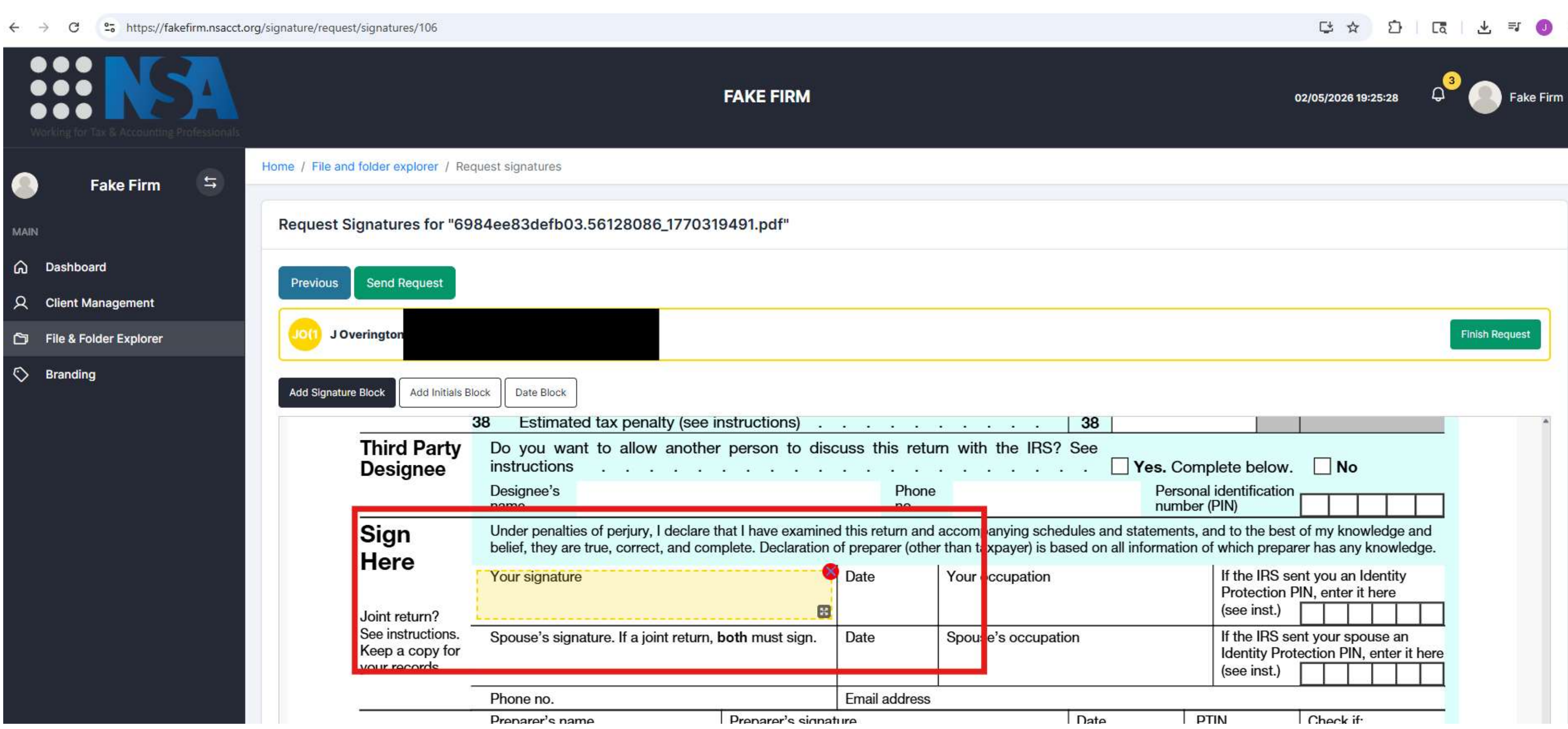
Step 7.4 – Place Signature Fields

Use the tools to place required fields:

- **Add Signature Block**
- **Add Initials Block**
- **Date Block**



Draw each box in the appropriate place on the document.



If multiple signatures are required, repeat for each signer.

Step 7.5 – Send Request

Click **Finish Request**. The client is automatically emailed a secure signature request.

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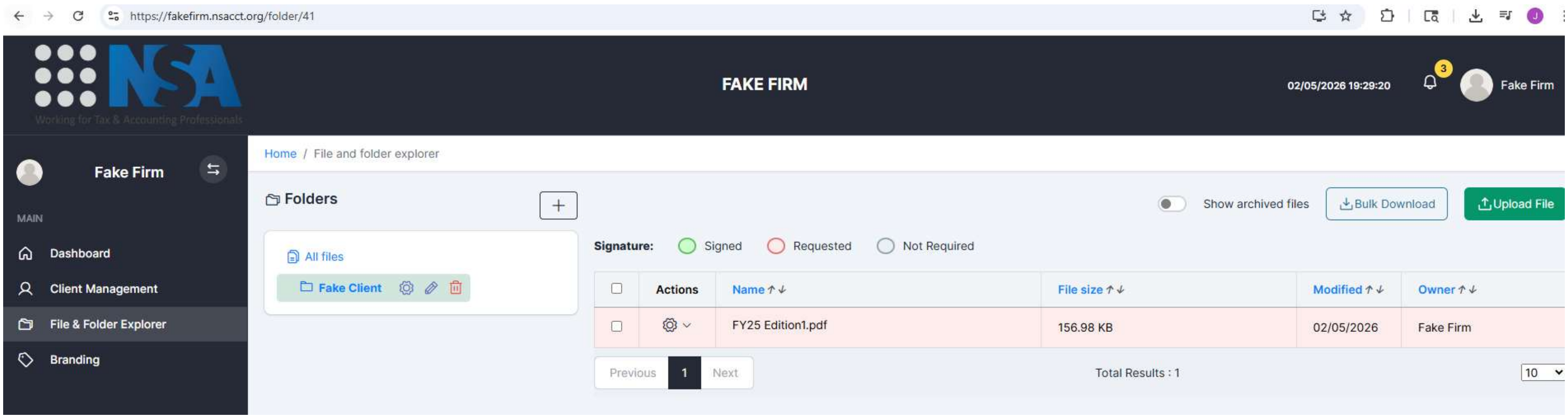
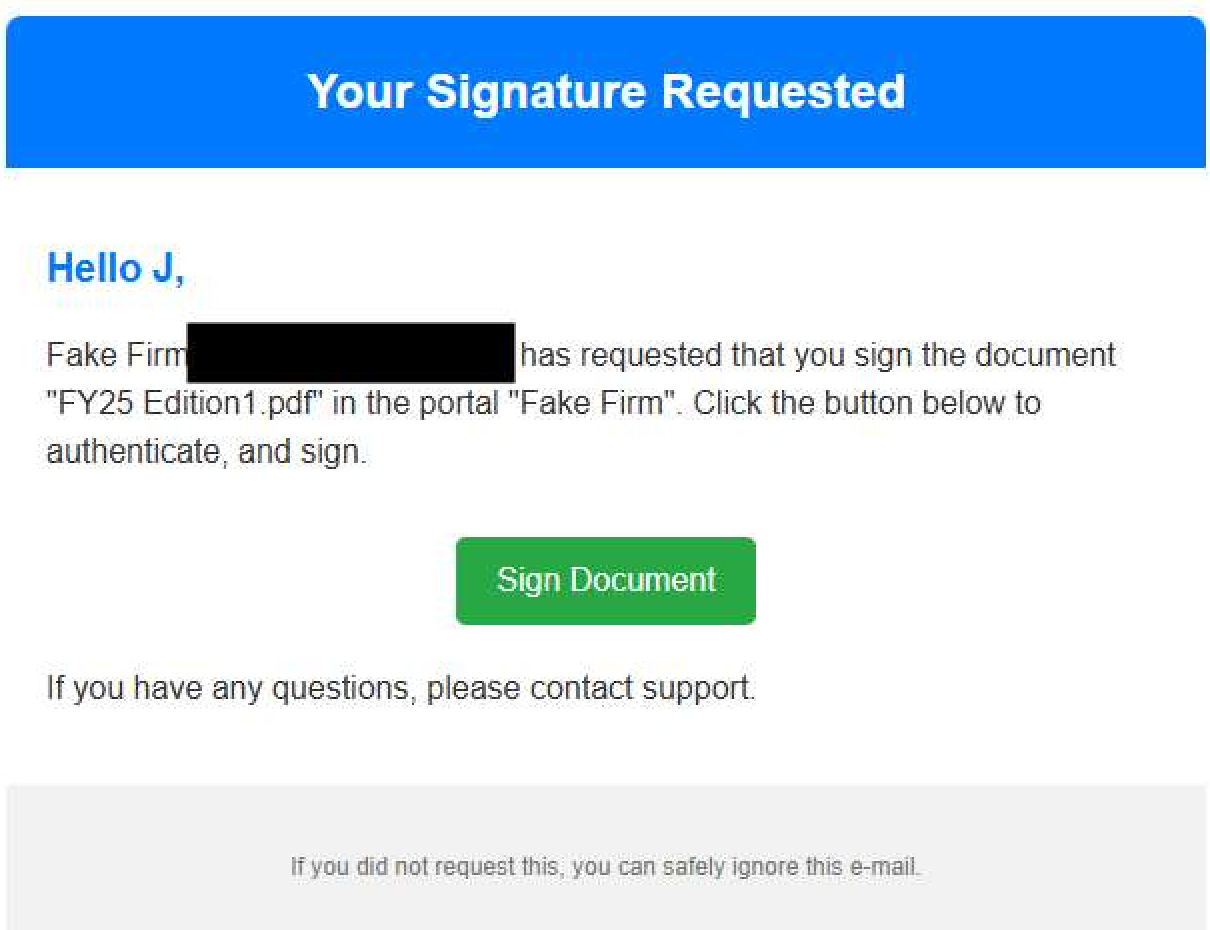
8. Signature Status Indicators

Once a signature is requested, the file is highlighted to indicate action is pending.



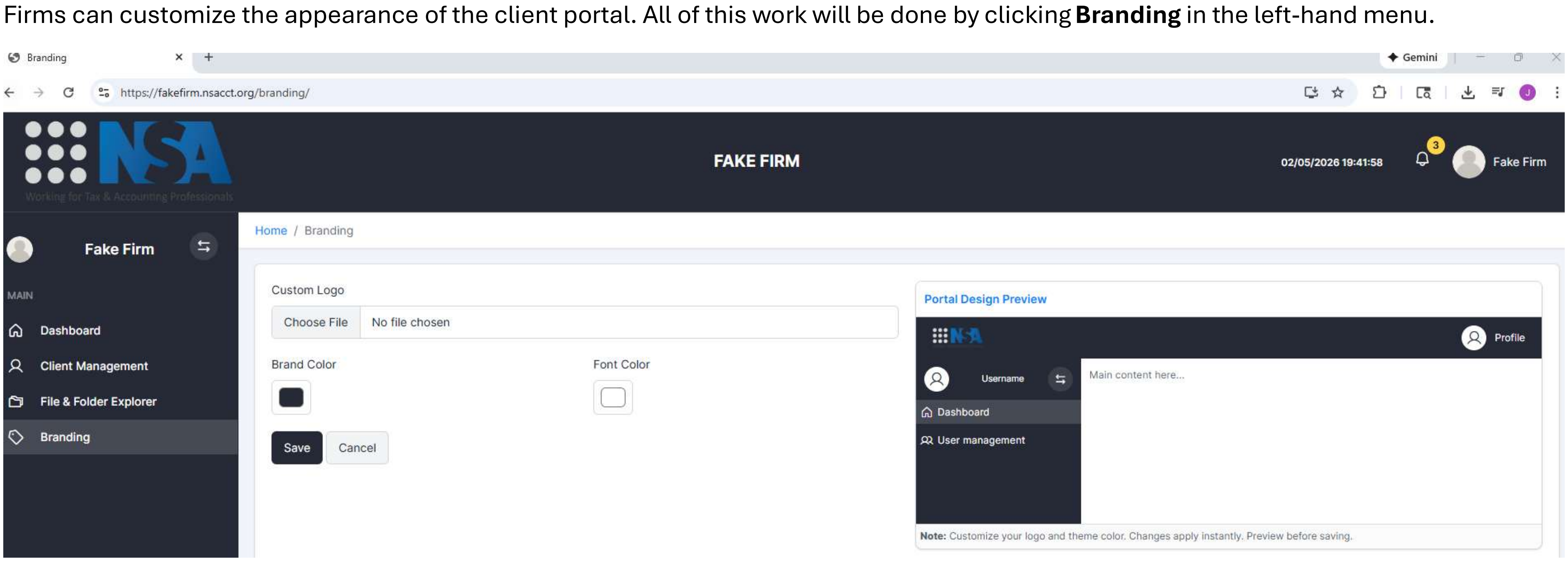
9. Client Email Notification

Clients receive an email prompting them to sign the document securely.



10. Branding the Client Experience

Firms can customize the appearance of the client portal. All of this work will be done by clicking **Branding** in the left-hand menu.



Options include:

- Uploading a custom logo
- Setting brand colors
- Previewing changes before saving

Final Notes

- Clients must activate their accounts before permissions or signatures work.
- Security links will expire; resend access emails as needed.
- NSA is constantly working to refine and improve this tool, please don't hesitate to contact us with any questions, suggestions, or issues here: members@nsacct.org