

## 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.

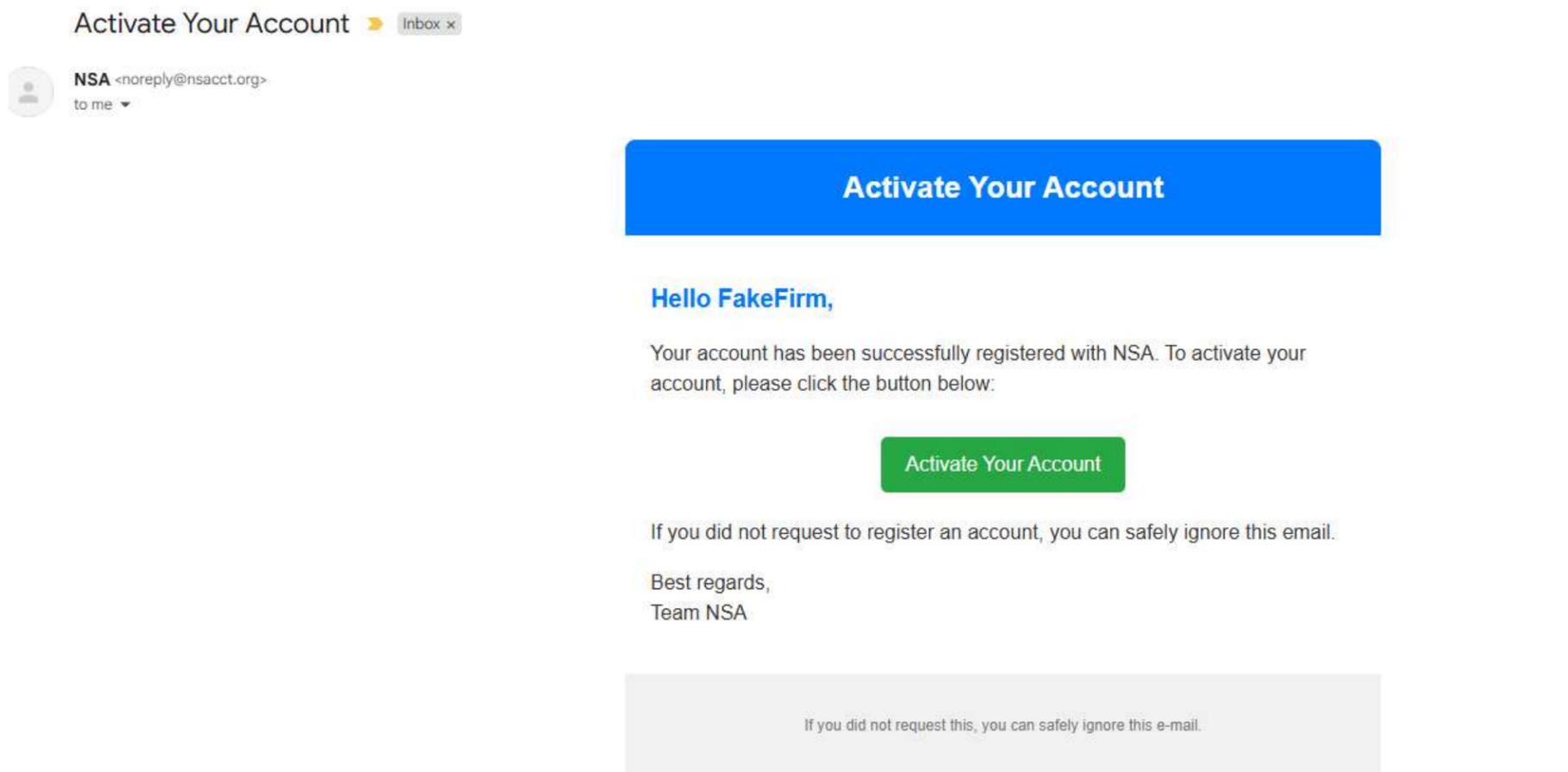
### 1. Account Activation and First Login

#### 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**.

The screenshot shows a "Create your Password" form. At the top is the NSA logo, which consists of a grid of dots followed by the letters "NSA". Below the logo is the heading "Create your Password". The form contains two input fields: "New password \*" and "Confirm new password \*". At the bottom of the form is a blue button labeled "Save Password" with a circular arrow icon to its left.

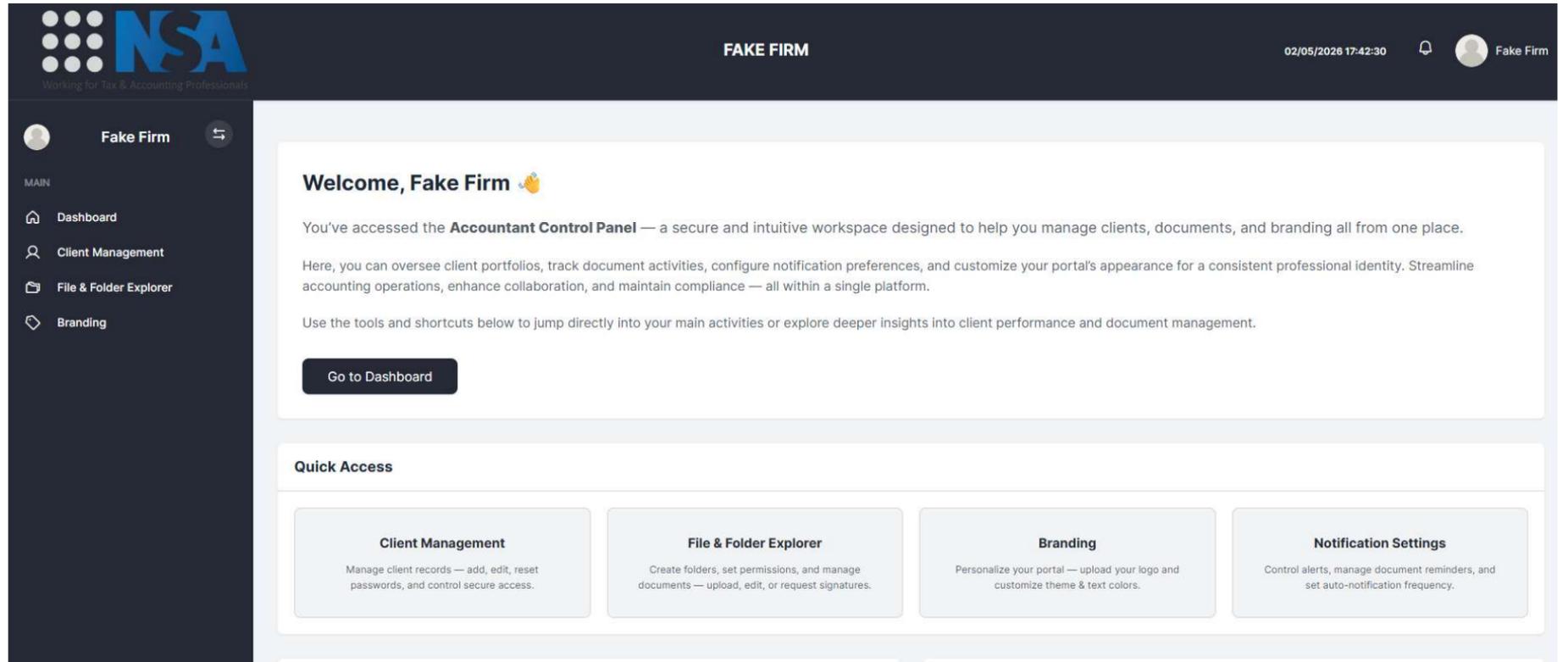
## Step 1.3 – Log In

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

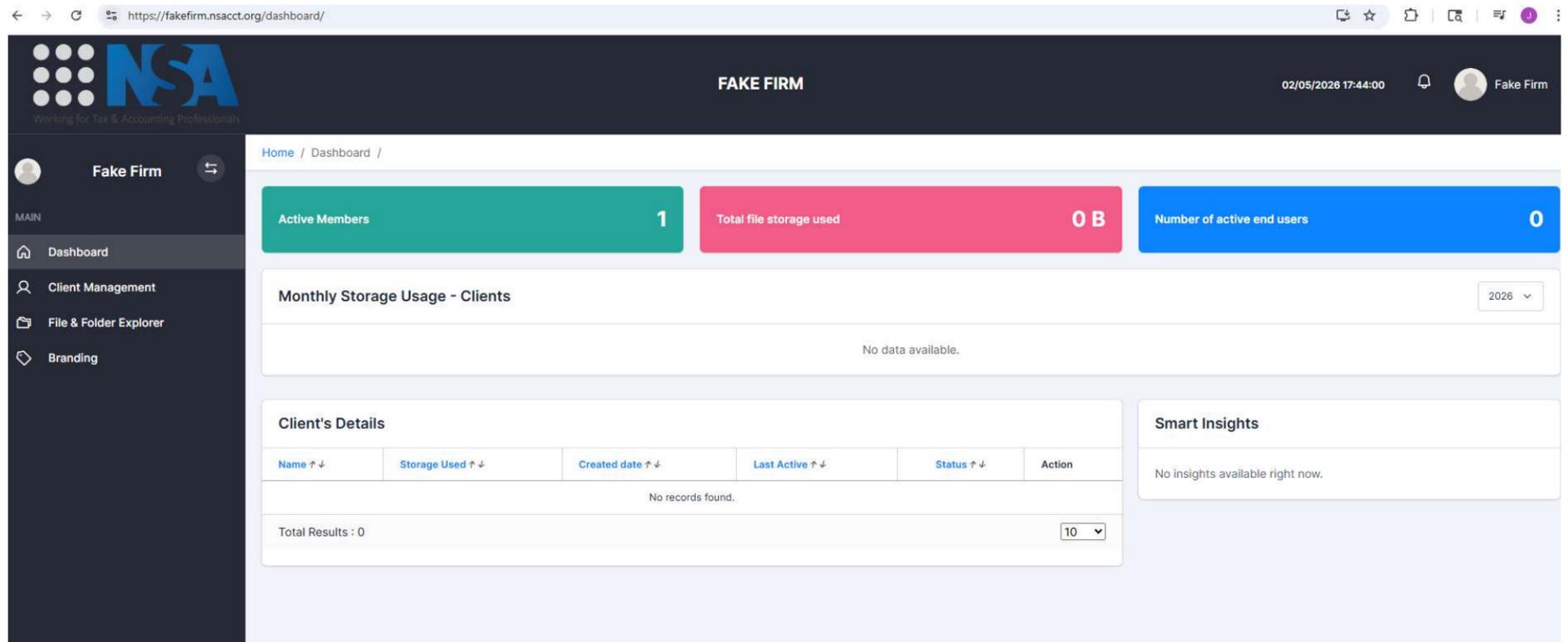
1. Enter your username/email and password.
2. Sign in to access NSA Sync.

## 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.



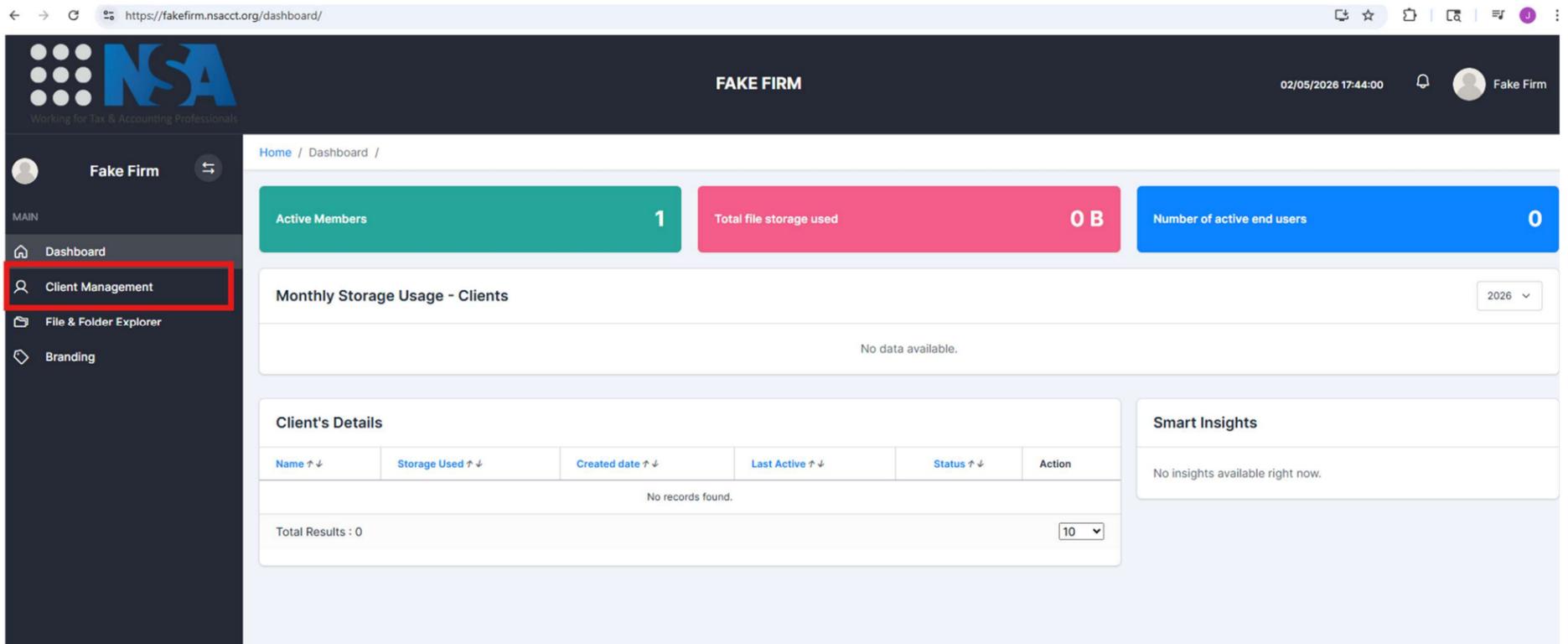
Select **Go to Dashboard** to access the main working dashboard, or use the shortcuts to jump directly to Client Management, File & Folder Explorer, Branding, or Notification Settings.



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

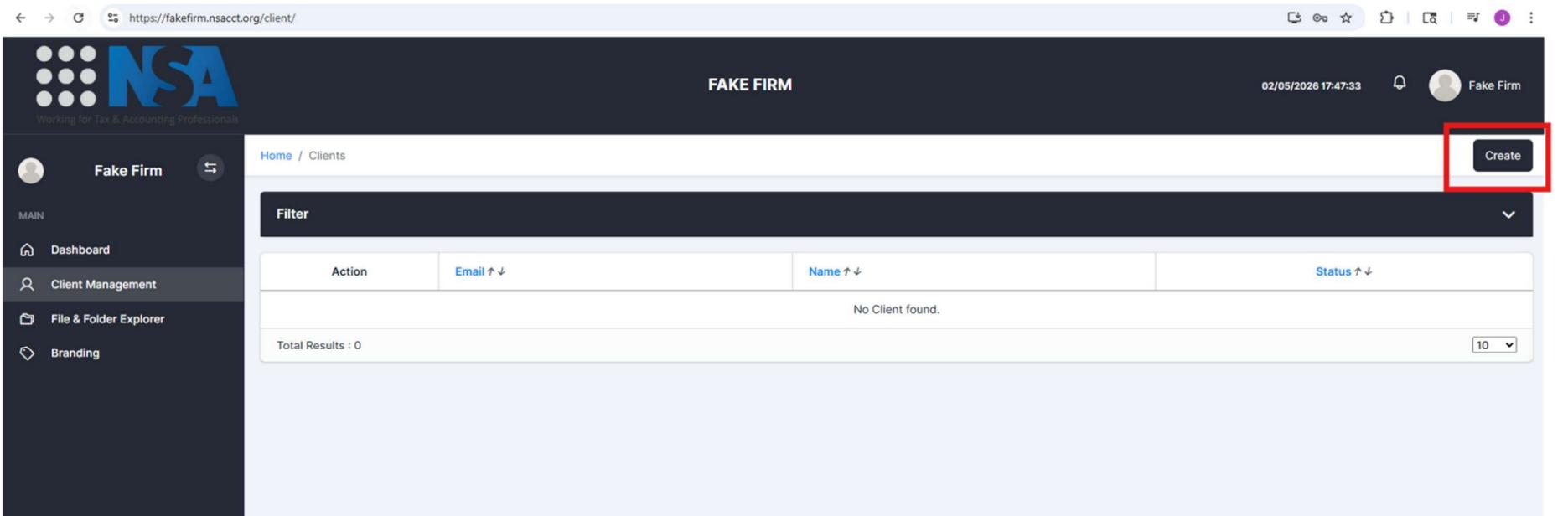
### Step 3.1 – Open Client Management

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



### Step 3.2 – Create a Client

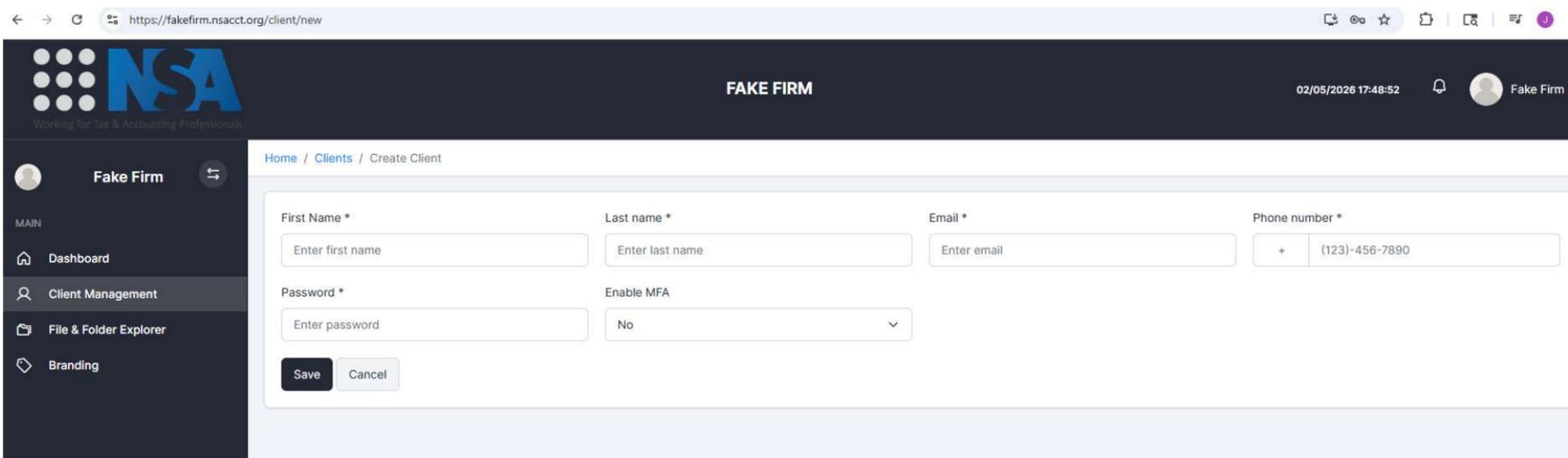
On the Clients screen, click the **Create** button in the top-right corner.



### Step 3.3 – Enter Client Information

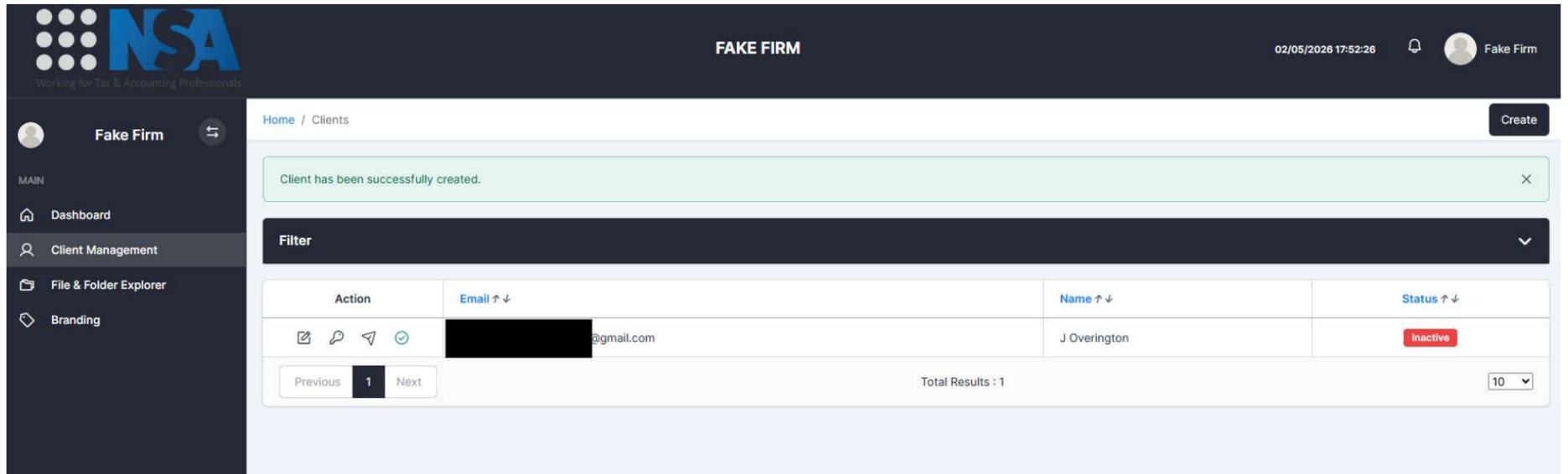
Fill in the client's information:

- 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

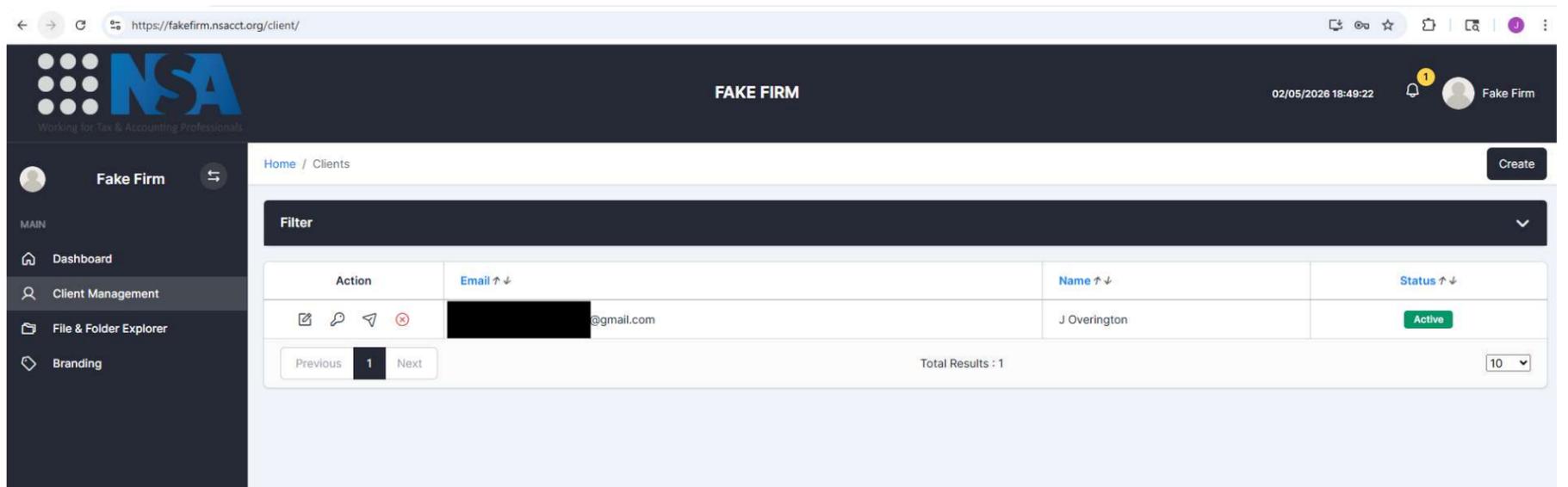
Once saved, the system confirms the client was created successfully.



### 3.5 Note - Client Activation Status

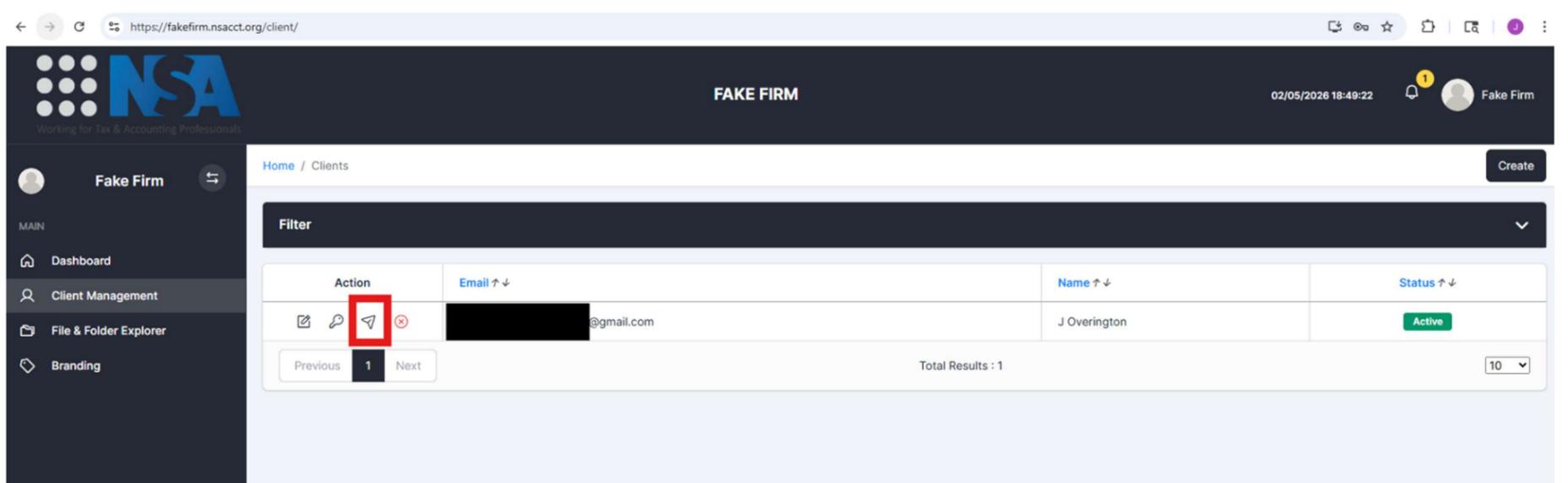
New clients initially appear as **Inactive**. After the client activates their account via the automated email, their status updates to **Active**.

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



### 3.6 Note - Resending Activation / Access Emails

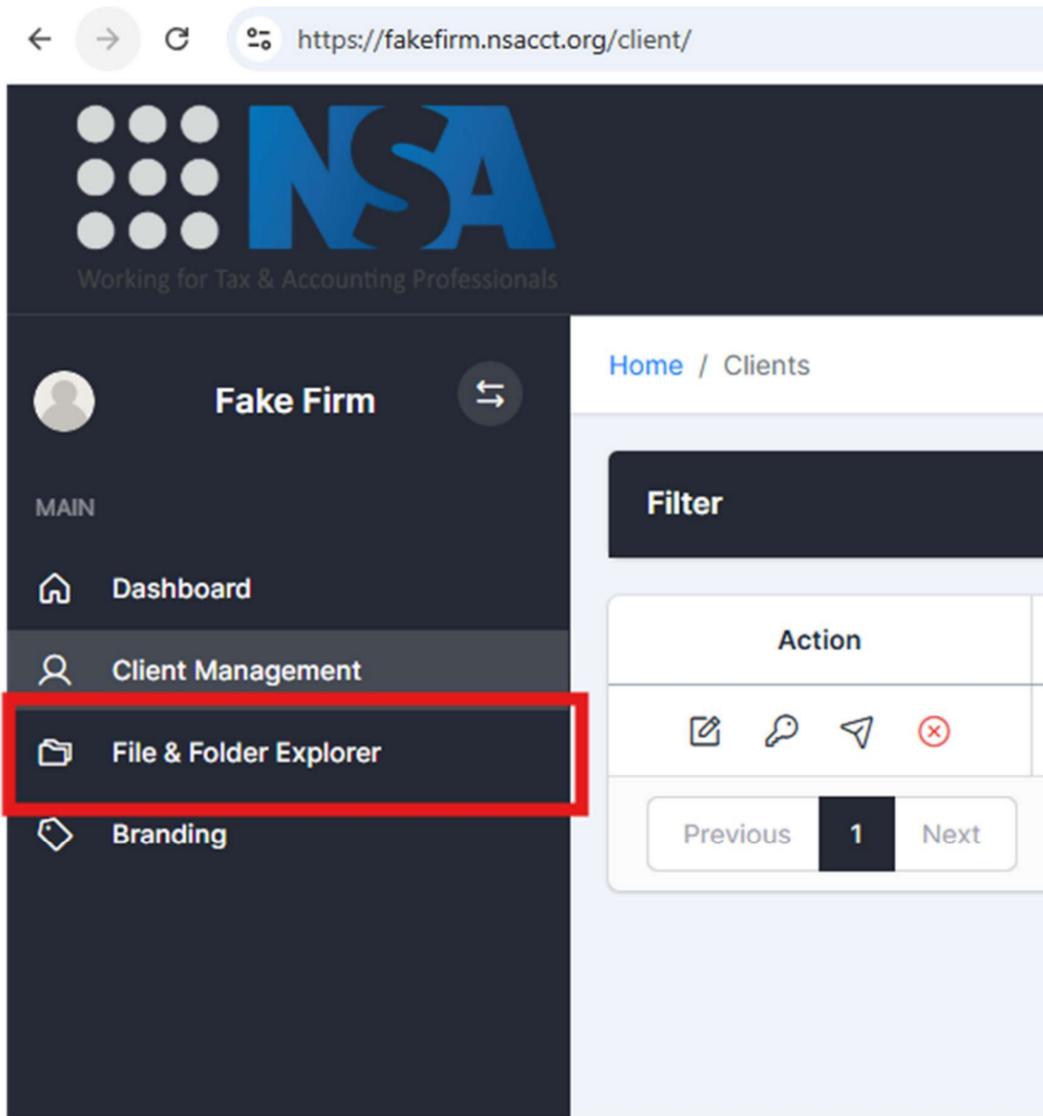
Security tokens do expire for security reasons. If a client's link expires, click the **paper plane (Send Reset Email)** icon to resend.



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

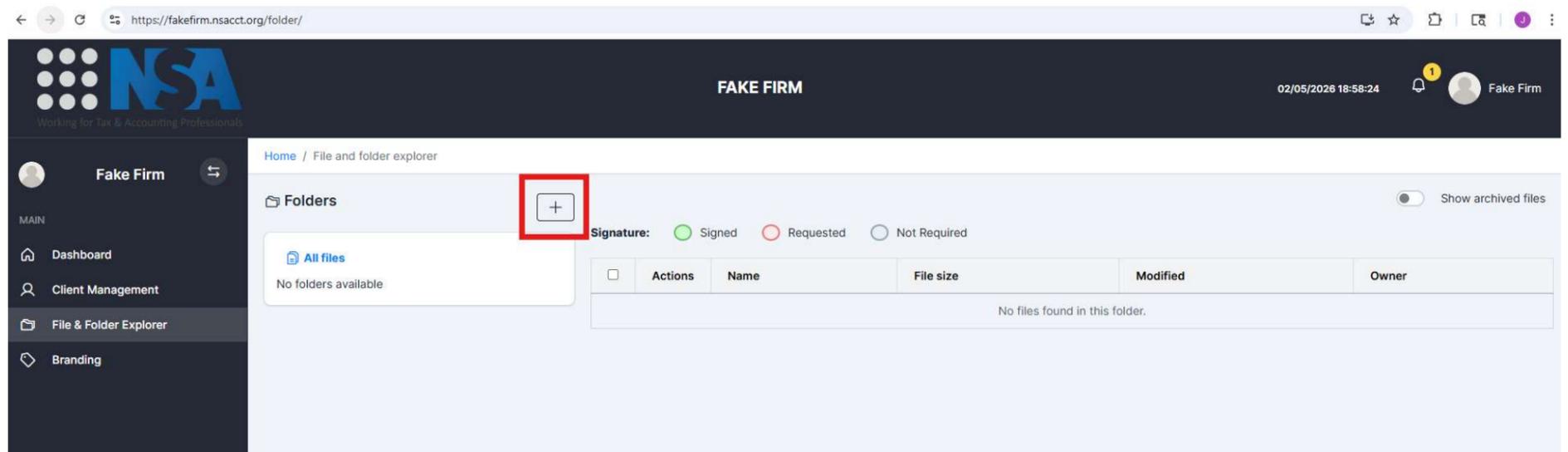
**Step 4.1 – Open File & Folder Explorer**

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

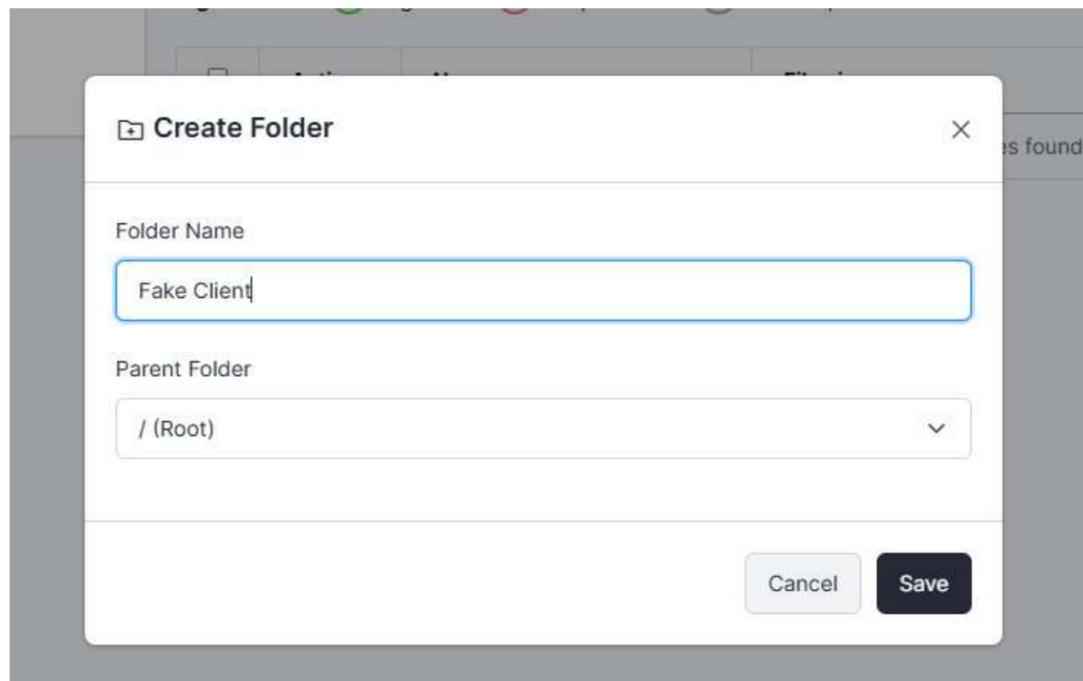


**Step 4.2 – Create a Folder**

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

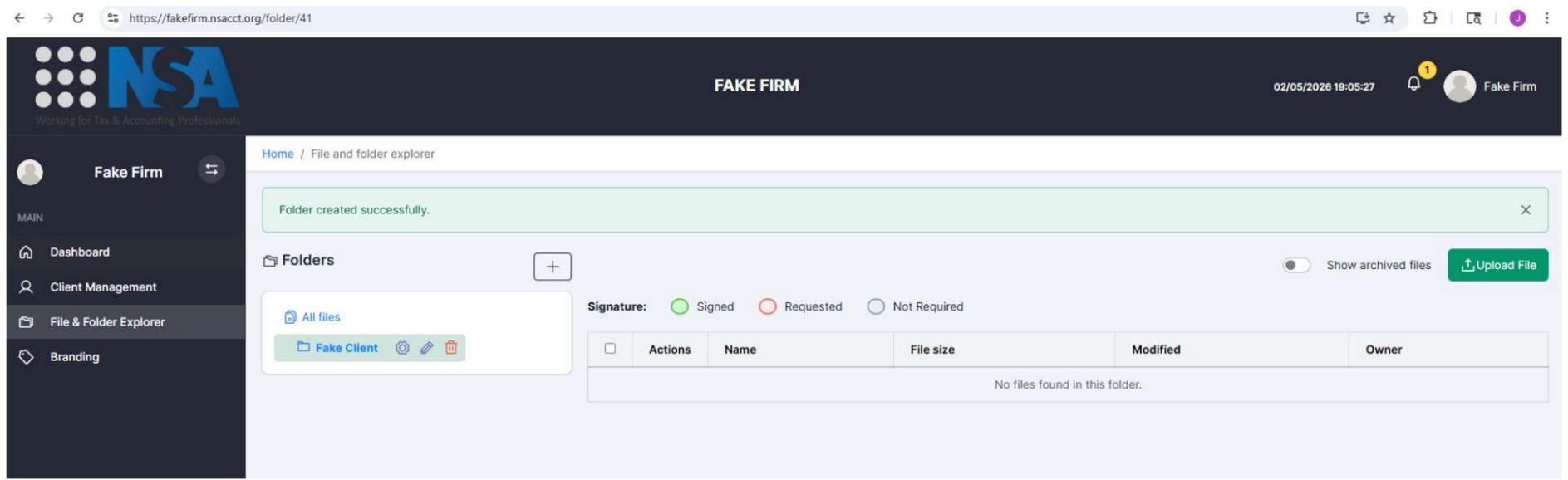


Enter the client's name as the folder name and save.



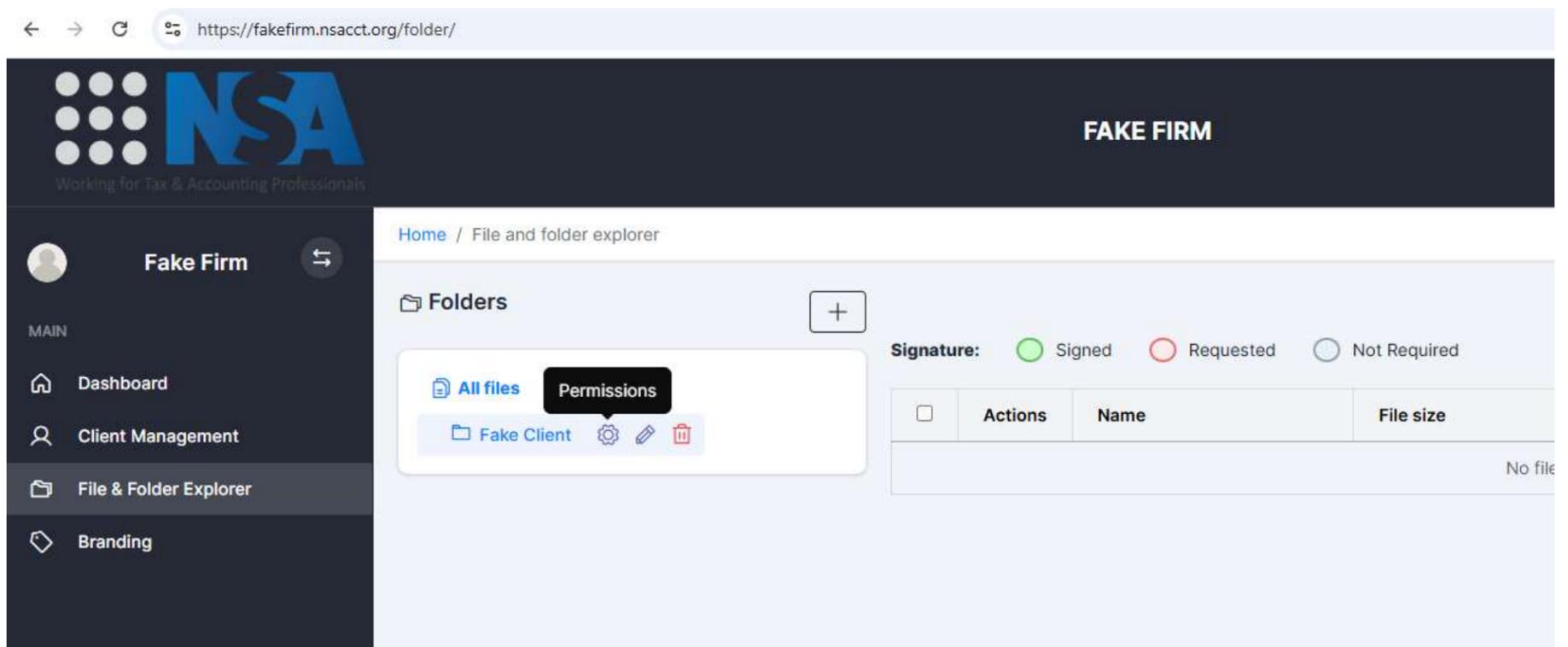
### Step 4.3 – Folder Created

The new client folder appears in the folder list.



### 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.

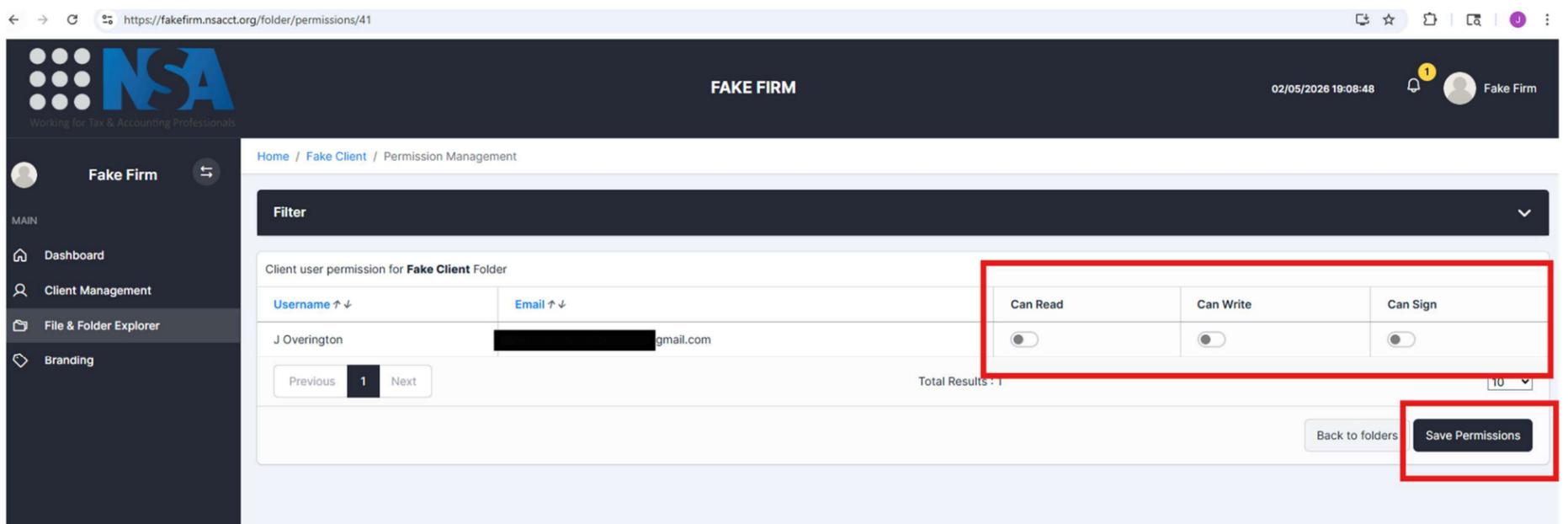


### Permission Options

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.



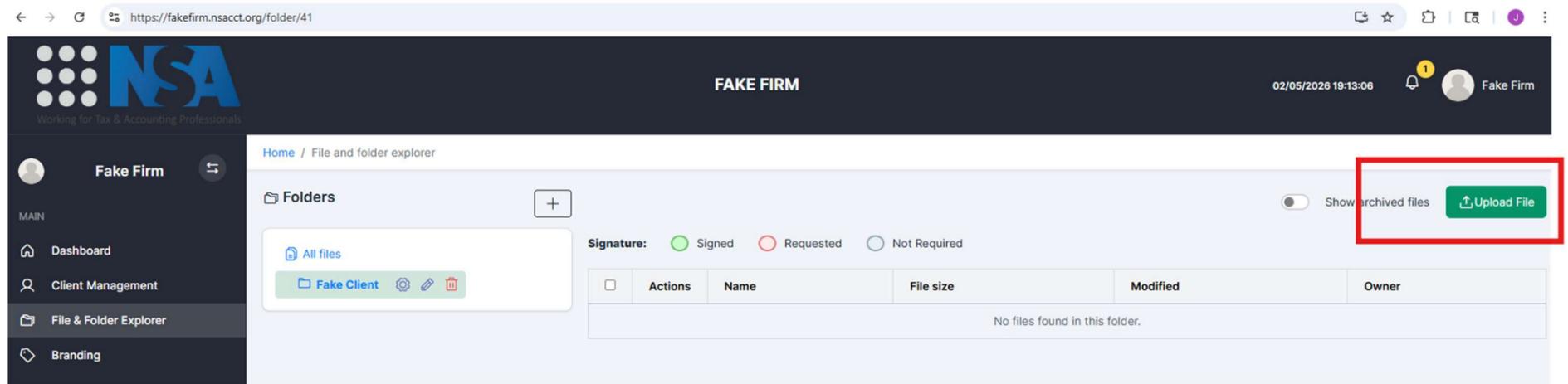
## 6. Uploading Files – Once a folder is created, users can easily upload documents for Clients to read, edit, and/or sign.

### Step 6.1 – Select Client Folder

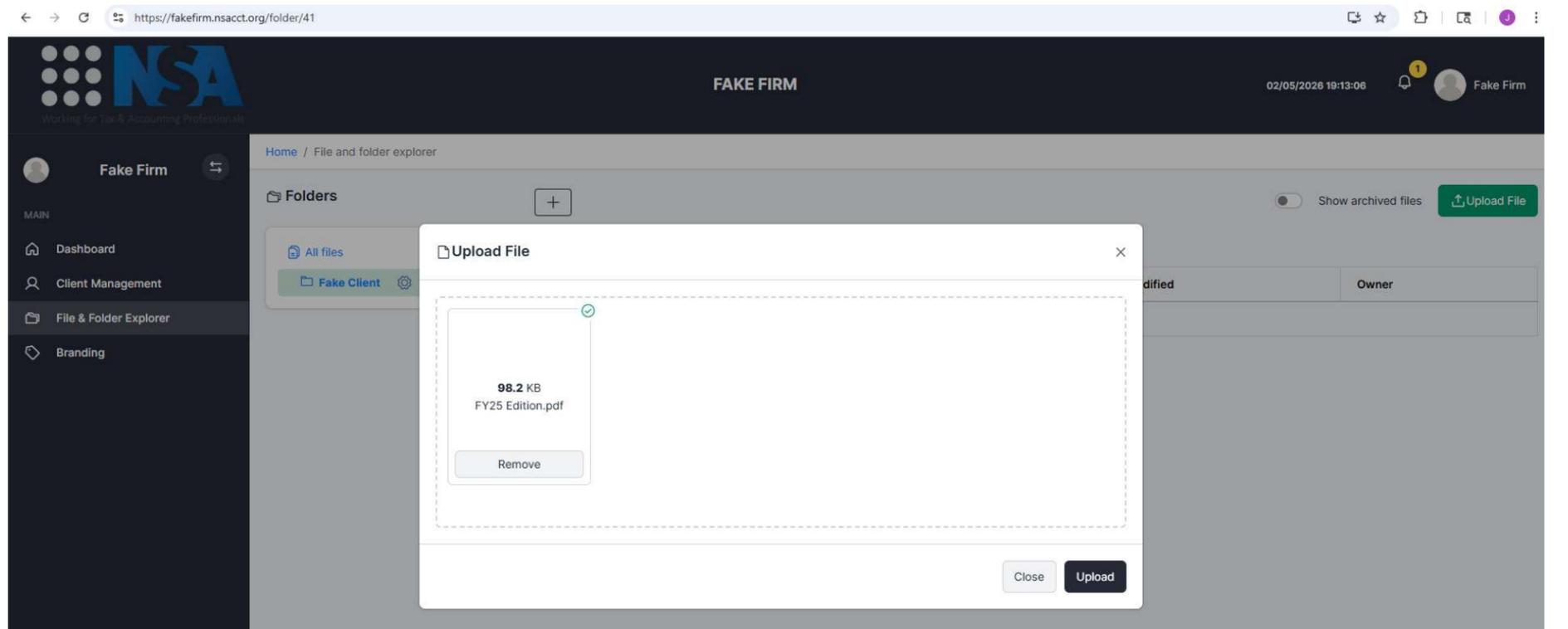
Click the client's folder to make it active.

### Step 6.2 – Upload File

Click the green **Upload File** button.

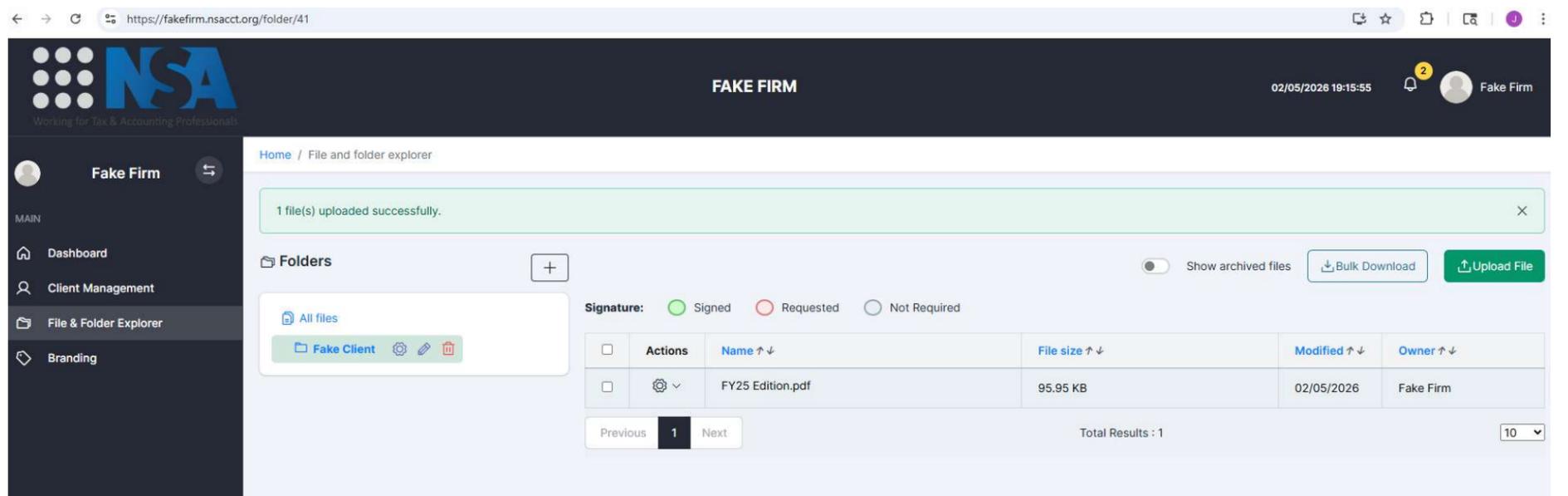


Select the file and click **Upload**.



### 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**.

The screenshot shows the Fake Firm web application interface. The top navigation bar includes the NSA logo, the text 'FAKE FIRM', and the date '02/05/2026 19:15:55'. The left sidebar contains navigation links: Dashboard, Client Management, File & Folder Explorer, and Branding. The main content area is titled 'Home / File and folder explorer' and displays a file named 'FY25 Edition.pdf' (95.95 KB, modified 02/05/2026). A context menu is open over the file, with the 'Request Signature' option highlighted by a red rectangle. Other menu options include Download, Edit, Move, Archive, and Trash. A notification at the top indicates '1 file(s) uploaded successfully.'

### Step 7.2 – Select Signers

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

The screenshot shows the 'Request Signatures' page for the file '6984ec679e9f62.15534941\_1770318951.pdf'. The page title is 'Request Signatures for "6984ec679e9f62.15534941\_1770318951.pdf"'. Under the heading 'Select Users to Sign', there is a toggle switch for 'J Overington' which is currently turned on. A blue 'Next' button is located at the bottom of the selection area.

### Step 7.3 – Confirm Signers

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

The screenshot shows the 'Review Selected Users' page for the same file. The page title is 'Request Signatures for "6984ec679e9f62.15534941\_1770318951.pdf"'. Under the heading 'Review Selected Users', there is a list of one user: '1. J Overington'. Below the list are two buttons: 'Previous' and 'Next'.

## Step 7.4 – Place Signature Fields

Use the tools to place required fields:

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

Request Signatures for "6984ee83defb03.56128086\_1770319491.pdf"

Previous Send Request

J Overington [Redacted] Finish Request

Add Signature Block Add Initials Block Date Block

Form 1040 Department of the Treasury—Internal Revenue Service 2023 U.S. Individual Income Tax Return OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

For the year Jan. 1–Dec. 31, 2023, or other tax year beginning \_\_\_\_\_, 2023, ending \_\_\_\_\_, 20

See separate instructions.

Your first name and middle initial	Last name	Your social security number
If joint return, spouse's first name and middle initial	Last name	Spouse's social security number

Draw each box in the appropriate place on the document.

Request Signatures for "6984ee83defb03.56128086\_1770319491.pdf"

Previous Send Request

J Overington [Redacted] Finish Request

Add Signature Block Add Initials Block Date Block

38 Estimated tax penalty (see instructions) 38

Third Party Designee Do you want to allow another person to discuss this return with the IRS? See instructions  Yes. Complete below.  No

Designee's name Phone number Personal identification number (PIN)

Sign Here Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)

Joint return? See instructions. Keep a copy for your records.

Phone no. Preparer's name Preparer's signature Date PTIN Check if

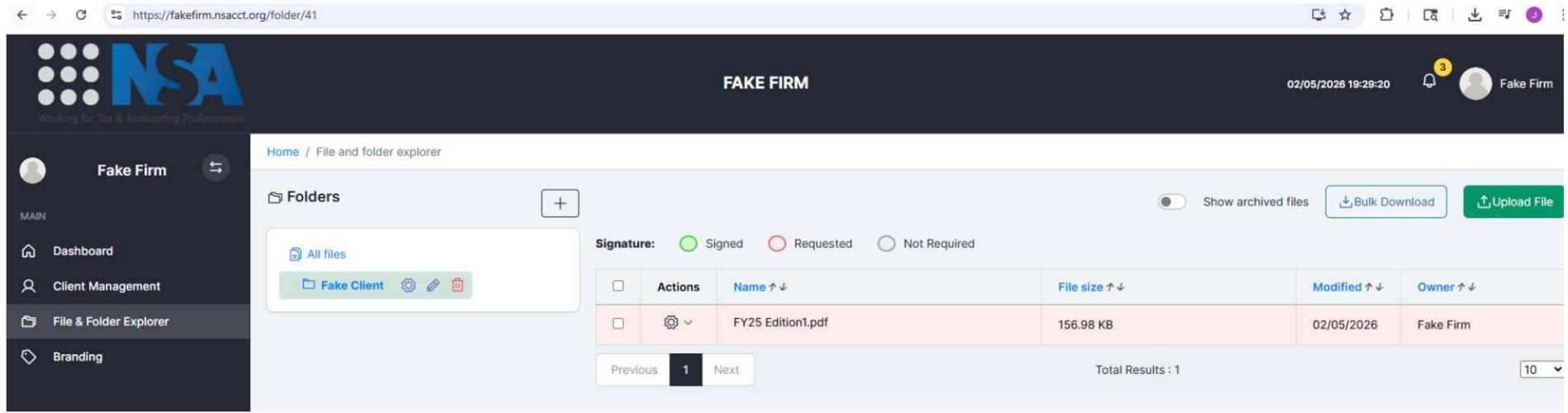
If multiple signatures are required, repeat for each signer.

## Step 7.5 – Send Request

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

## 8. Signature Status Indicators

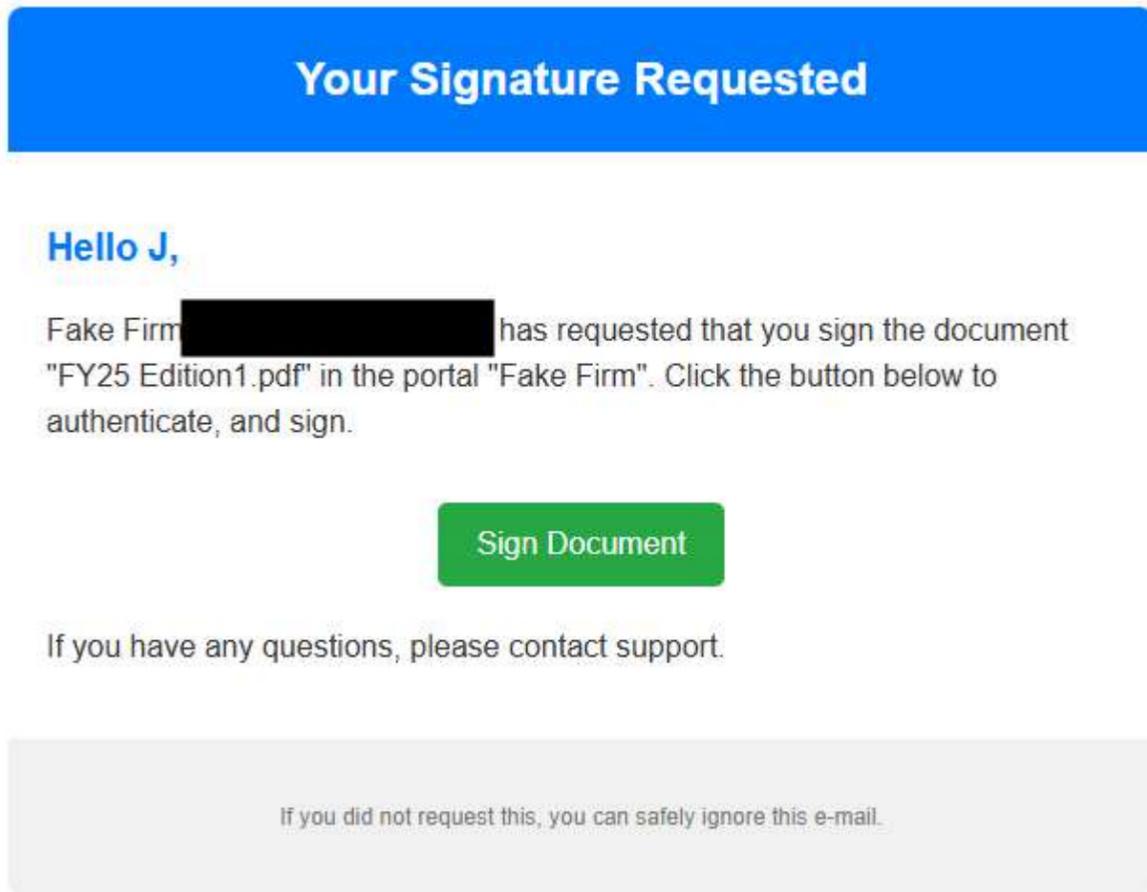
Once a signature is requested, the file is highlighted to indicate action is pending.



The screenshot shows the Fake Firm file explorer interface. The top navigation bar includes the NSA logo, the text 'FAKE FIRM', and the date '02/05/2026 19:29:20'. The left sidebar contains a 'Fake Firm' profile and a 'MAIN' menu with options: Dashboard, Client Management, File & Folder Explorer, and Branding. The main content area is titled 'Home / File and folder explorer' and shows a 'Folders' section with 'All files' and 'Fake Client'. A table of files is displayed with columns for 'Actions', 'Name', 'File size', 'Modified', and 'Owner'. The file 'FY25 Edition1.pdf' is highlighted in red, indicating a 'Requested' signature status. The table also shows a 'Signature' status for each file, with 'Signed' (green), 'Requested' (red), and 'Not Required' (grey) options. The file 'FY25 Edition1.pdf' has a size of 156.98 KB and was modified on 02/05/2026. The interface also includes a 'Bulk Download' button, an 'Upload File' button, and a 'Show archived files' toggle.

## 9. Client Email Notification

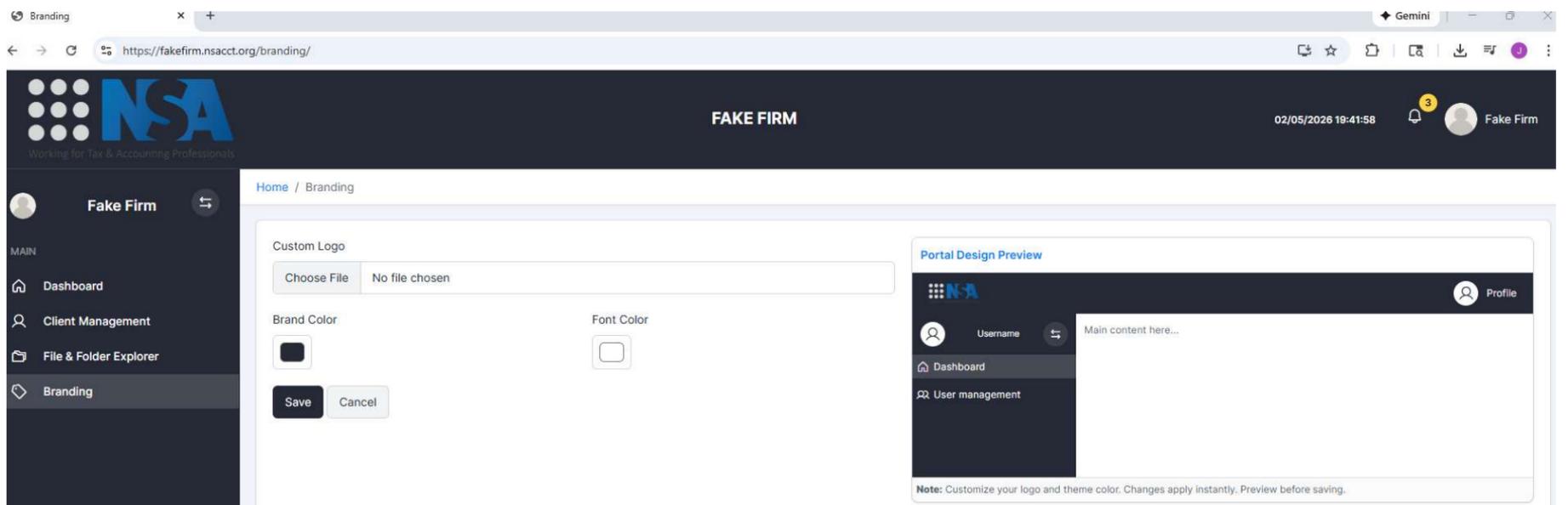
Clients receive an email prompting them to sign the document securely.



The screenshot shows an email notification with a blue header that reads 'Your Signature Requested'. The body of the email starts with 'Hello J,' followed by a message from 'Fake Firm' requesting the user to sign a document named 'FY25 Edition1.pdf'. A green button labeled 'Sign Document' is prominently displayed. Below the button, there is a note: 'If you have any questions, please contact support.' At the bottom of the email, a grey box contains the text: 'If you did not request this, you can safely ignore this e-mail.'

## 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.



The screenshot shows the Fake Firm branding configuration interface. The top navigation bar includes the NSA logo, the text 'FAKE FIRM', and the date '02/05/2026 19:41:58'. The left sidebar contains a 'Fake Firm' profile and a 'MAIN' menu with options: Dashboard, Client Management, File & Folder Explorer, and Branding. The main content area is titled 'Home / Branding' and features a 'Custom Logo' section with a 'Choose File' button and a 'No file chosen' message. Below this, there are 'Brand Color' and 'Font Color' selection options, each with a color picker and a 'Save' button. A 'Portal Design Preview' section on the right shows a preview of the client portal with a custom logo, a 'Profile' button, and a 'Main content here...' area. A note at the bottom of the preview states: 'Note: Customize your logo and theme color. Changes apply instantly, Preview before saving.'

Options include:

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

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**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](mailto:members@nsacct.org)