Instructions for Financial Institutions
Transferring Files to DFI using Box

Summary:

1. Create a Box Account (if you do not already have one).

2. Access the DFI Secure Folder
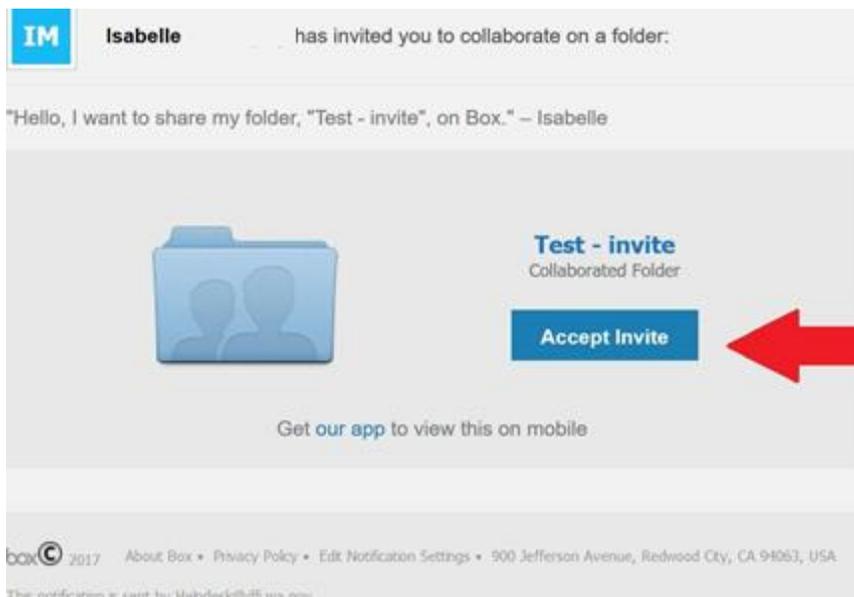
3. Upload your file to the DFI Folder.

1. Create a Box Account:

You received and opened an email invitation to a folder from a DFI's Box account.

You must click the **Accept Invite** button.

Box Instructions for External Users

After clicking the *Accept Invite* button, a web browser opens the Box Collaborator Sign Up page.

Please take note who originated the invitation:

> '**State of Washington – DFI'**

Your Box username will be your email address.

- In the Full Name field, **enter** a name or nickname you'd like to use for your Box account,

The email address field will be populated with your work email address.

- Create a complex password.

A complex password contains at least 8 characters, and includes a special character, a number, and uppercase and/or lowercase letters.

- **Type** in your cell phone (the cell number will be used to set up Two-Factor authentication later if required)

- Click **Submit.**

Box Collaborator Sign Up

'State of Washington-DFI' Has Invited You to Collaborate on 'Test - invite'

Your Information

Full Name

Invite Test

Email Address

nrl71134@rcasd.com

Password

•••••••••••••••••••••••   Good

Phone Number

360 456 4526

Submit

By registering you agree to Box's Terms of Service and Privacy Policy.

Already have an account? Log in here.

The **Welcome to Box** window will appear.
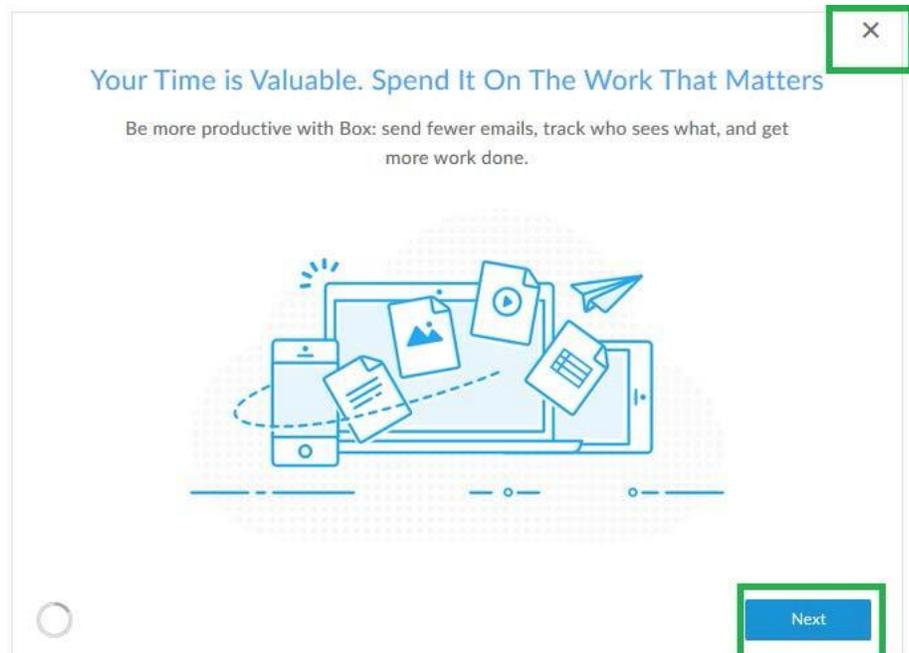
Click on the link:

Skip this and go straight to Box

Welcome to Box, Invite Test!

Let's personalize your experience.
What do you mostly plan to use Box for?

FOR PERSONAL USE

FOR WORK

Next

Skip this and go straight to Box

"Your time is valuable…" Box instructions will follow.

You may either **click** on the **X** to close the window
or
click on **Nex**t (a few times) if you would like to know more about Box.

×

Your Time is Valuable. Spend It On The Work That Matters

Be more productive with Box: send fewer emails, track who sees what, and get more work done.

Next

Your Personal Box account is now setup.

Next, accept the invitation (to collaborate in order to be allowed to upload files into the correct folder (s)).

You have 2 options:
1. Click **See Invitations or**
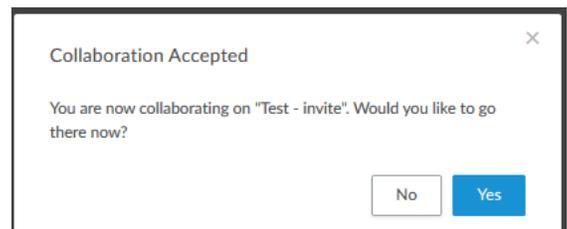2. Click on the **Messages** area (2) located in the left menu.
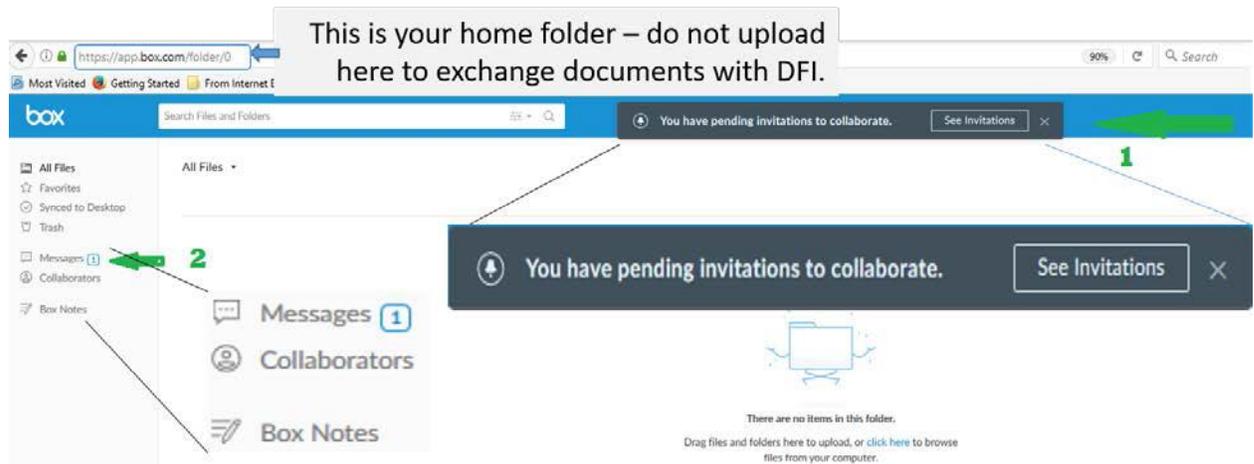
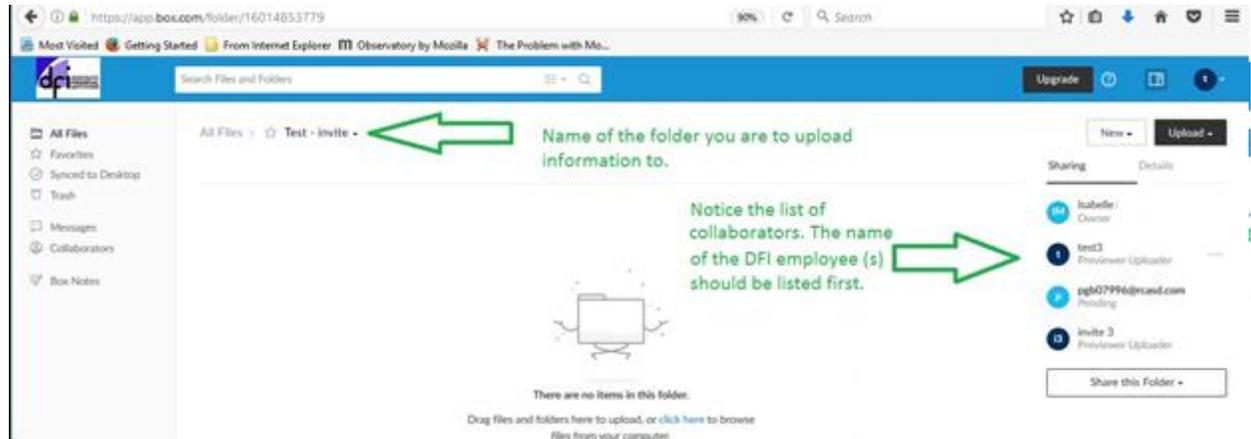Once you click on See Invitations, the following window will open. Click **accept**

The "collaboration accepted" window will open.

Press **Yes.**

Box Instructions for External Users

You are now ready to upload files to collaborate with the DFI employee.

-**Check** if you see the **name of the folder**, which was shared with you.
-Ensure you see the name of the DFI employee who invited you.

To upload files, you have 2 options:
1. Drag and drop
2. Use the upload button.

Once file(s) upload is completed, there will be a green popup notification.

Box Instructions for External Users