

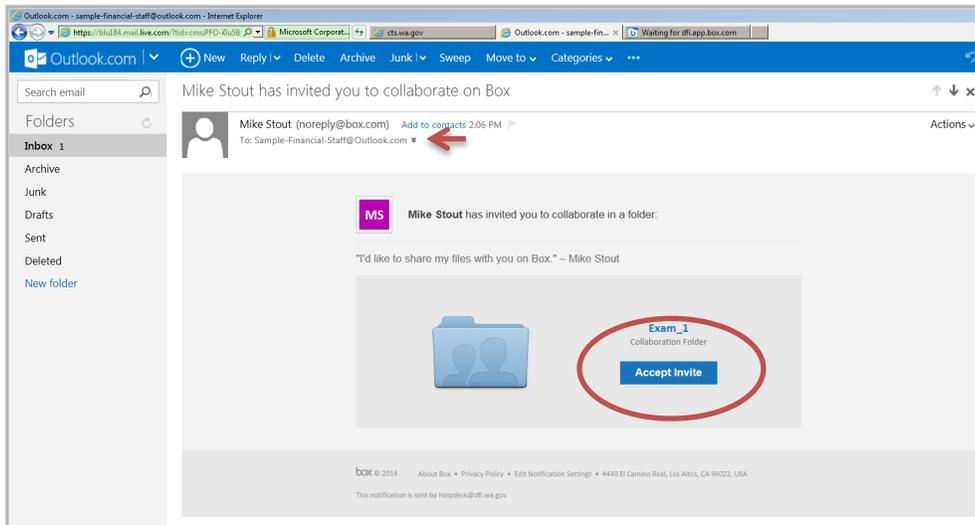
Instructions for Financial Institutions Transferring Files to DFI using Box

Summary:

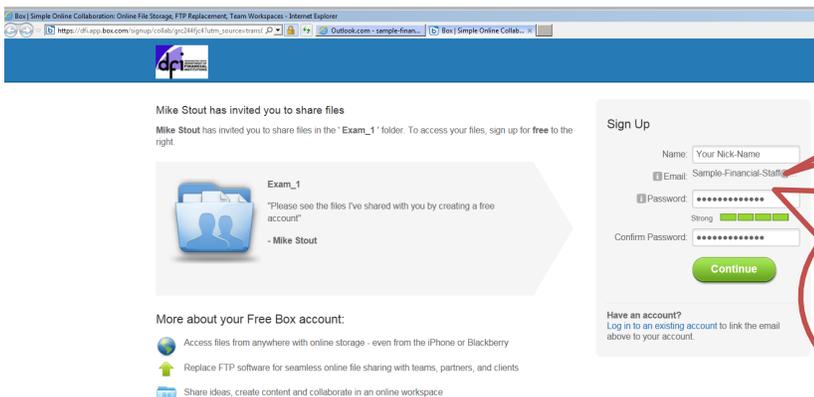
1. Create a Box Account (if you don't already have one).
2. Access the DFI Secure Folder
3. Upload your file to the DFI Folder.

1. Create a Box Account:

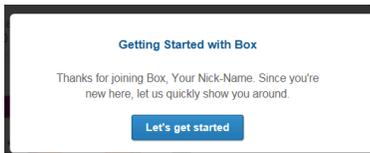
Your financial institution's representative receives an email invitation to a folder from DFI's Box account. He or she must click the **Accept Invite** button. It's circled in the diagram below. In this example, Mike Stout sent the invitation and Sample-Financial-Staff@Outlook.com is the financial institution's representative creating the new Box account (arrow).



After clicking the **Accept Invite** button, a web browser opens the Box Sign Up page. Your Box username will be your email address. In the Name field, enter a name or nickname you'd like to use for your Box account, a complex password and then click **Continue**. A complex password contains at least 8 characters, and includes a special character, a number, and uppercase and/or lowercase letters.



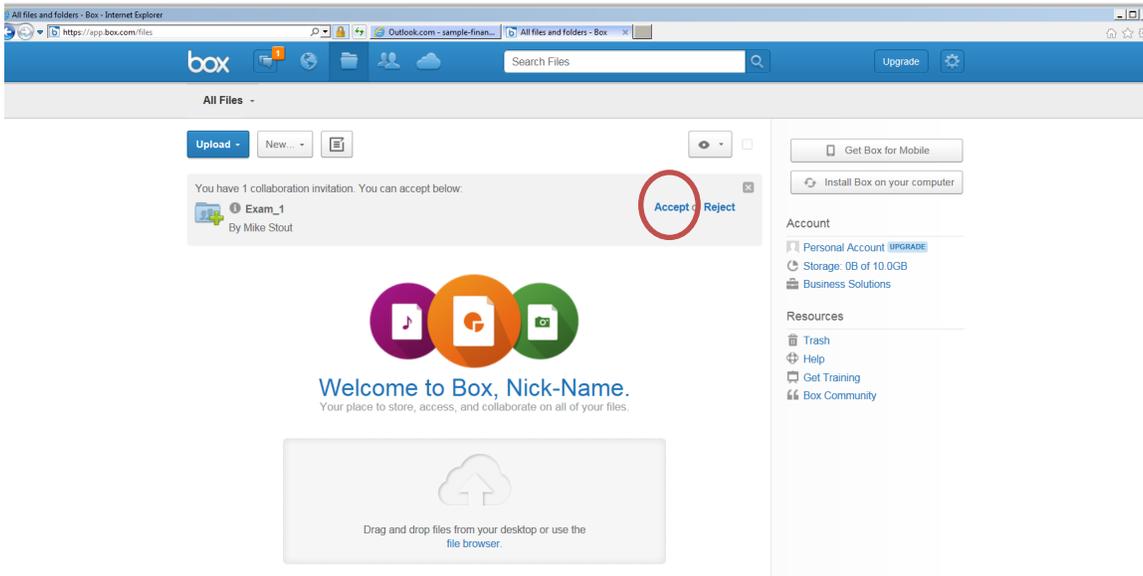
A brief tutorial is available after creating an account. You can bypass the tutorial by pressing ESC on your keyboard.



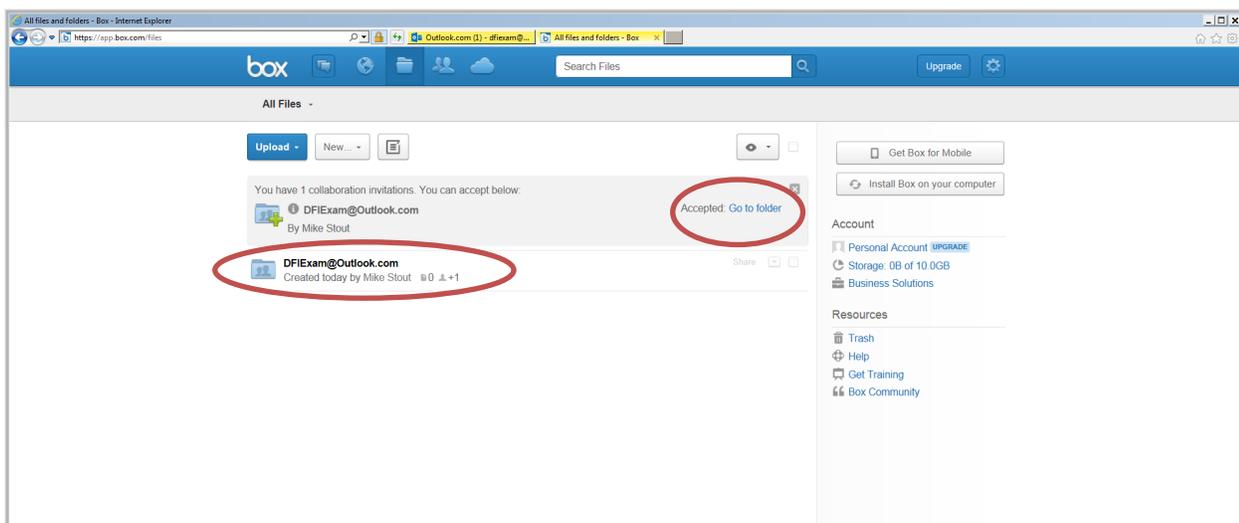
The Financial Institution representative now has a free personal Box account.

2. Access the DFI Secure Folder:

In order to access DFI's Secure Folder, click **Accept** (circled below) in the collaboration invitation box.



Then to enter the secure DFI folder, click **Go to folder**, or click the blue folder icon (circled).

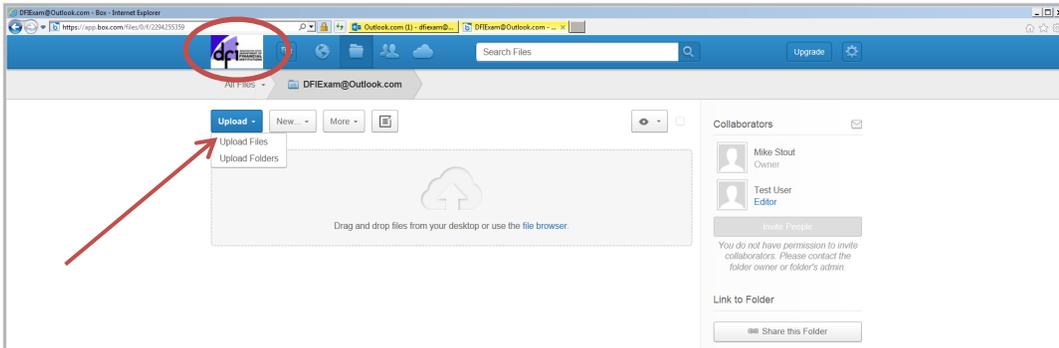


3. Upload Your Files:

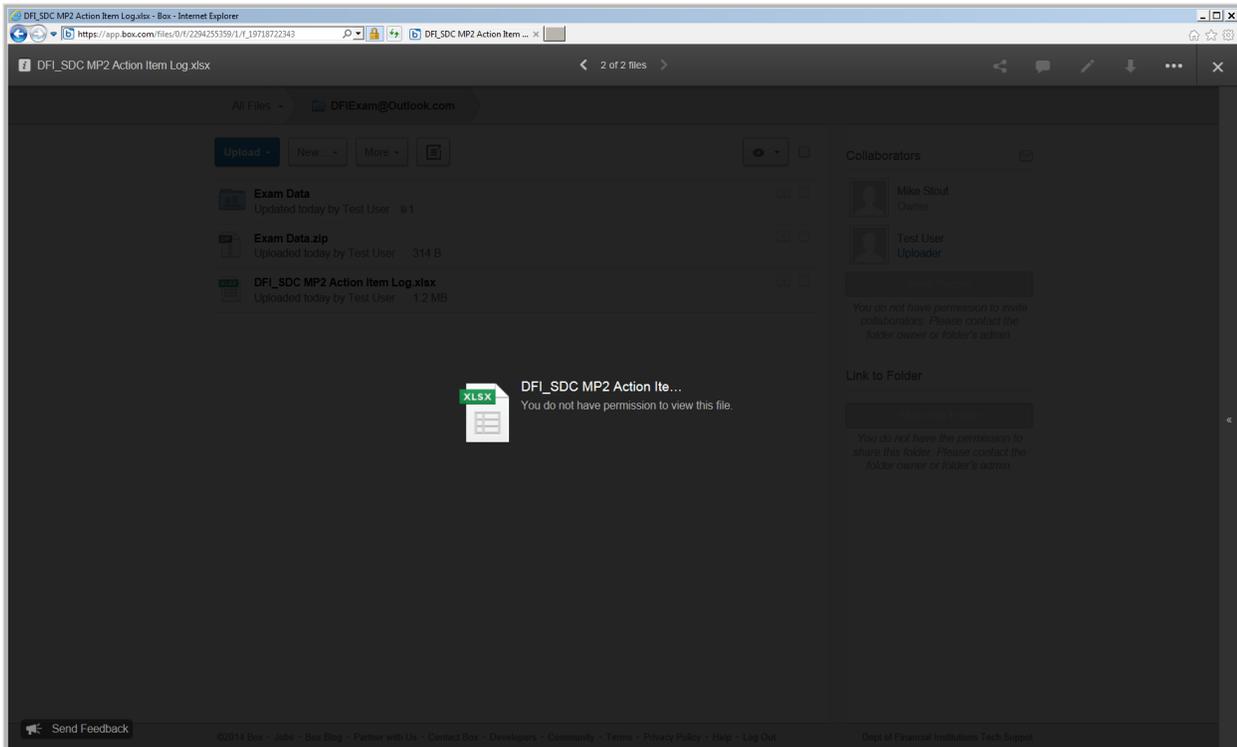
Please ensure that you see the purple DFI Logo indicating that you are uploading to DFI's secure folder (circled).

Note: If this is your first time using Box, please upload a test file and call your DFI representative to verify the upload.

Complete your upload to the DFI folder on Box by clicking the blue **Upload** button and select **Upload Files**. Then browse to the exam file(s) to be uploaded and press **Open**.

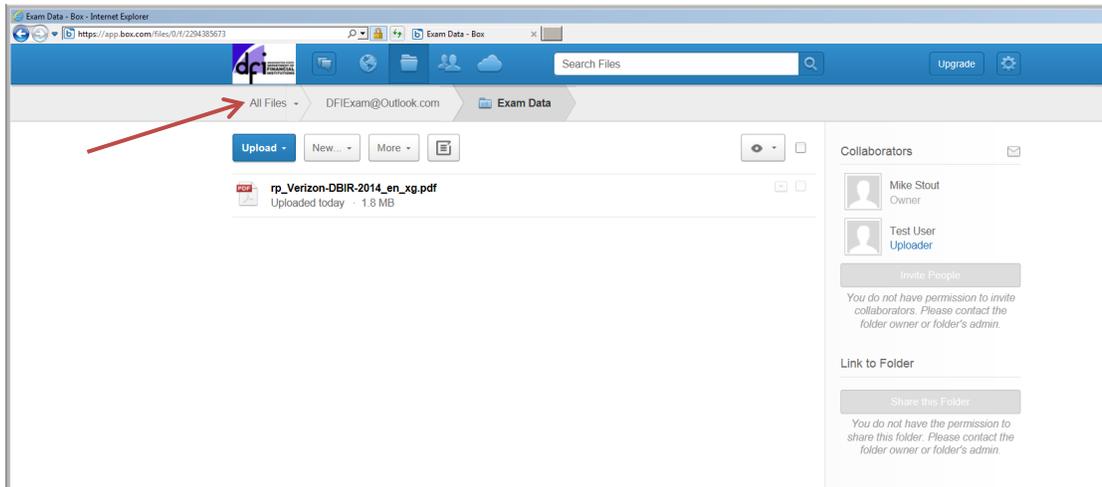


When the upload is complete, you will see your file(s) listed in the secure DFI folder. These file(s) can only be accessed by an authorized DFI employee. Employees of the financial institution cannot access the files as shown by the screen below.



After uploading your files, phone your DFI Representative to let them know the upload is complete.

To navigate back to your personal folder click **All Files** (arrow).



The following information is provided to assist you with using your Box.com account. If you have other questions, please contact your DFI representative or the DFI helpdesk at 360-725-9692.

Help

Box.com [Video Library](#)

Box.com [Help Documents](#)

Password Requirements

Please create a complex password which contains at least 8 characters, including at least one of the following:

- A Number (012345...)
- A Special Character (!@#\$%)
- An Uppercase or Lowercase Letter (ABCD ... | abcd...)

The password reset interval is 90 Days.

A few password examples are: 14daMoney! , (2fodaSho), &Tree2GetReady – do not use these examples!