

box overview

What is Box?

Box allows us to securely store, organize and share files up to 2 GB. It also gives us the ability to allow others to share documents and larger files. If you don't have a Box account, these instructions will walk you through how to set up an account. If you have an existing account, we've also included instructions on accepting and reviewing the files you've received.



LOGGING IN TO BOX

- 1 You will receive an email to collaborate on a file.
- 2 Click Accept Invite.

box Sign Up

Jack Donaher invited you to collaborate on:
Test Folder

"I'd like to share my files with you on Box." – Jack Donaher

Accept Invite

To receive access to your shared documents, and to start securely storing and collaborating on all of your content, please create a free Box account. This free account comes with 10 GB of storage to:



If you do NOT have an account, you will need to create one



Creating an account

1

Fill out the necessary information on the page.

2

Click the necessary boxes.

3

You will receive a verification email.

4

Once you have verified your email, you will need to set up two-factor authentication and accept Terms of Service.

Create Your Account

Jack Donaher has invited you to collaborate on "Test Folder"

Signup for a Box account to accept invite

Full Name

Business Email Address

Password

Confirm Password

Phone Number

I live in the European Economic Area or U.K.

By checking this box, you agree to Box's [Terms of Service](#) and confirm you have read Box's [Privacy Policy](#). You also agree to receive emails from Box regarding product and service updates, special offers, events and webinars, and other marketing materials. You may unsubscribe at any time.

Your Current Plan:

Box Individual

- ✓ 10 GB Storage
- ✓ 250 MB file upload limit
- ✓ Secure file sharing
- [+ Show More Features](#)

Today's Total **Free**

Learn more about Box



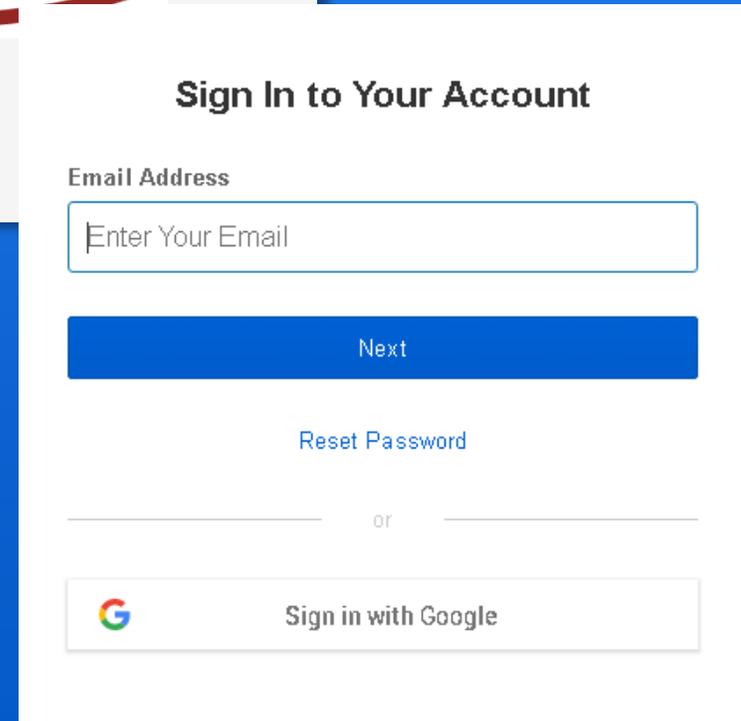
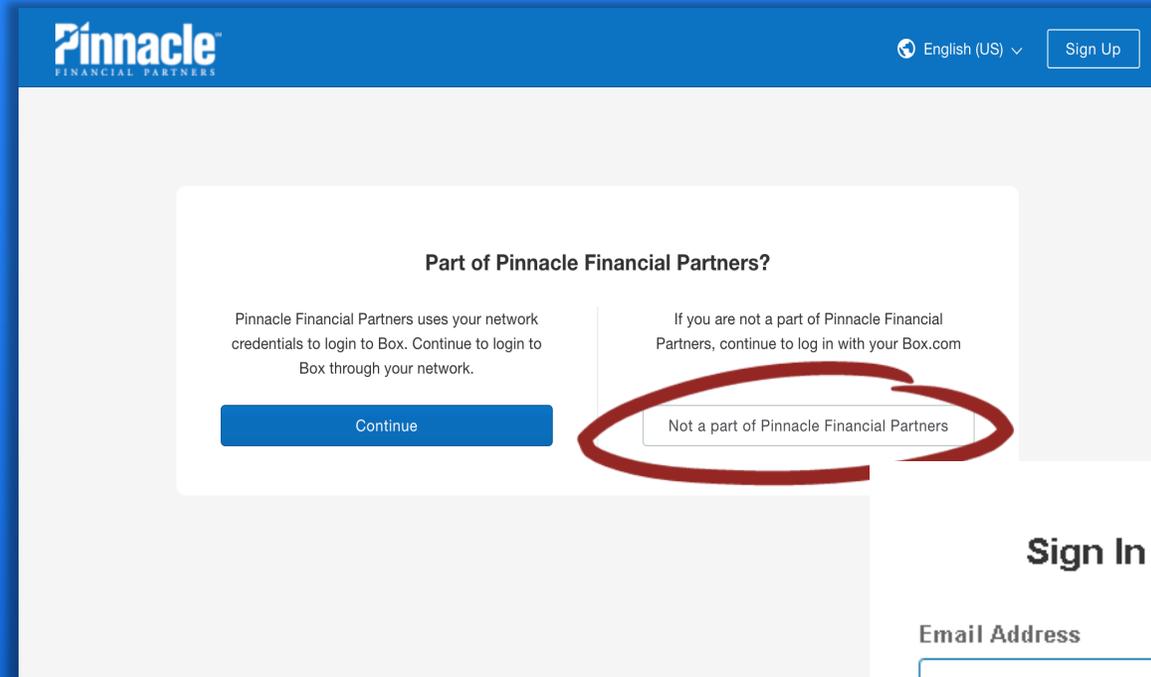


If you have an account, you will log in with your username and password



Current Box Account

- 1 Click on “Not a part of Pinnacle Financial Partners” if prompted.
- 2 Enter your email address.
- 3 Enter your password.



Searching

- 1 Use the Search box at the top of the page.
- 2 Enter a keyword(s).
- 3 The results will display any file or folder with the keyword(s) in the name *or* within the file.

Search Files and Folders

All Files ▾

Recent Files

NAME	UPDATED ↑	SIZE	
Mike Baker	Today by Mike Baker	1 File	
Get Started with Box.pdf	Jul 28, 2023 by Mike Baker	1.8 MB	
Test Upload.csv	Today by Mike Baker	14.5 KB	

Collaborate in real time
Co-author in Microsoft Office desktop apps and auto save edits
[Get Started](#)

To learn more about Box features, click on the ? icon and choose *Help Center*.

To watch training videos or attend live, virtual sessions, click on the ? icon and choose *Get Training*.

The screenshot shows the Box web interface. At the top right, there is a navigation bar with the Pinnacle Financial Partners logo, a user profile icon (MB), and a 'New +' button. Below the navigation bar, a dropdown menu is open, showing options: 'Get Help', 'SUPPORT', 'Help Center', 'Get Training', and 'Send Feedback'. A red arrow points to the question mark icon in the top navigation bar. Below the menu, there is a 'Recent Files' section with a preview of a document titled 'Simplify how you work'. Below that, a table of files is visible:

NAME	CREATED ↑	SIZE	
...y by Mike Baker		1 File	
Get Started with Box.pdf	Jul 28, 2023 by Mike Baker	1.8 MB	
Test Upload.csv	Today by Mike Baker	14.5 KB	

On the right side of the interface, there is a card titled 'Collaborate in real time' with the text 'Co-author in Microsoft Office desktop apps and auto save edits' and a 'Get Started' link. At the bottom of the card, it shows '< 1/3 >'.