

MOSS ADAMS_{LLP}

Moss Adams Client Portal

Client User Guide

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About Moss Adams Client Portal

Moss Adams Client Portal is a tool that may be used to facilitate the transmission of sensitive data files between you and Moss Adams LLP. This tool encrypts data during transfer and while at rest within the Moss Adams Client Portal. Because of this, security is vastly improved over that of general internet transmissions such as e-mail. By accessing this system, you are agreeing to the terms and conditions of the Portal Access Agreement accessible through a link on the portal's login page. If you do not agree to such terms and conditions, then you should not access this system.

Client Portal Highlights



File Transfer Folder:

- Contains files uploaded by you and Moss Adams LLP, for use during an engagement.
- Both you and Moss Adams LLP can upload to and download from this folder.
- Files remain for up to **60 days** after they are uploaded and are then automatically deleted, if not deleted by a user earlier.



Final Deliverable Folder:

- Contains final deliverables uploaded by Moss Adams LLP, such as final tax returns, issued financial statement reports, etc...
- Both you and Moss Adams LLP can download from this folder.
- Only Moss Adams LLP can upload to this folder.
- Files remain for up to **2 years** after they are uploaded and are then automatically deleted, if not deleted by a Moss Adams LLP user earlier.



Client Roles:

- Client Portal User (created by a Client Administrator or a Moss Adams LLP user):
 - See only those folders to which they are assigned.
 - Upload and download documents to and from their assigned File Transfer Folder(s).
 - Download documents from their assigned Final Deliverables Folder(s).
 - Create sub-folders within their assigned File Transfer Folder(s).
 - Delete sub-folders and files they added.
 - See list of individuals with access to their assigned folders.
 - Customize frequency of e-mail alerts (real-time vs. periodic summary).
- Client Administrator (created by another Client Administrator or a Moss Adams LLP user):
 - The Client Administrator is the primary client user who manages portal access for others in your organization. The Client Administrator should maintain strong controls over access to the portal.
 - All abilities of a Client Portal User listed above.
 - Add and remove user access to their assigned File Transfer Folder(s).
 - Delete files and folders created by other users.

Browser Compatibility

Moss Adams Client Portal is accessible through most Web browsers. For optimal performance, use of one of the supported internet browsers listed below is recommended:

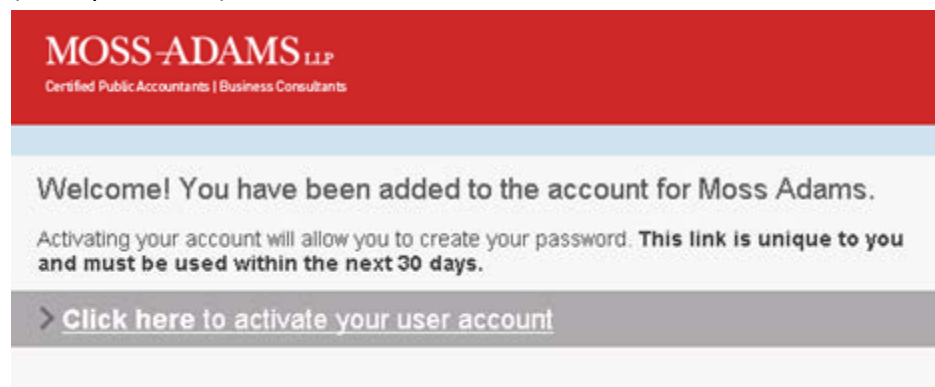
- **Microsoft Internet Explorer (Versions 8 -11)**
- **Mozilla Firefox (Latest version)**
- **Google Chrome (Latest version)**

Note: The instructions in this guide refer to Microsoft Internet Explorer 10. Other Web browsers may respond differently when you double-click on a file name, for example; however, this will not affect your ability to upload or download files.

Getting Started

Activate Account

A link to activate your user account and create a password will be sent to you by e-mail (example below).



1. Click the **Click here to activate your user account** link.
2. Create a password that contains a minimum of eight characters and includes at least one uppercase letter, one lowercase letter, and one numeral.
3. Navigate to the login screen <https://mossadams.sharefile.com/> and login using the password you created.

What to do if you forget your password

1. Navigate to the login screen and click **Forgot your Password?** Below the login boxes.

The login screen for Moss Adams LLP. It has a light blue background. At the top is a red banner with the company logo and tagline. Below this are two main sections: 'Employee Log-in' and 'Client Log-in', each with a lock icon. The 'Employee Log-in' section contains instructions for employees and a 'LOG IN' button. The 'Client Log-in' section has input fields for 'E-mail:' and 'Password:', a 'LOG IN' button, and a 'Forgot your password?' link highlighted with a blue box. At the bottom, there is a disclaimer about the terms of use.

2. Enter your e-mail address and click send.
3. A link to create a new password will be sent to you by e-mail.
4. Click the **Reset your password now** link.
5. Create a new password with criteria outlined in step 2 of Activate Account above.
6. Navigate to the login screen <https://mossadams.sharefile.com/> and login using your new password.

Navigation



Once logged into the Moss Adams Client Portal, take note of a few key areas:













- **Folders**
 - This is where you will find all folders to which you have access.
- **Favorite Folders**
 - Click the ☆ star icon next to any folder to add it to your Favorite Folders list for quick access to frequently used folders.
- **My Settings**
 - Using the **My Settings** link (located in the top navigation bar), you may adjust several settings including your time zone and frequency of e-mail alerts.

Managing Files and Folders

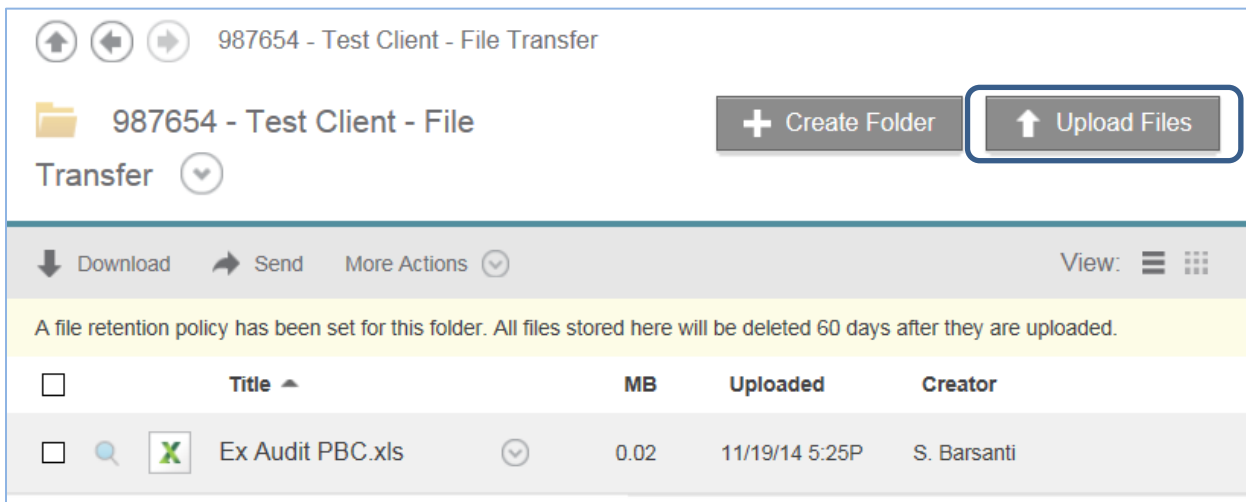
Uploading Files

1. Click on the name of the folder you want to upload file(s) to.

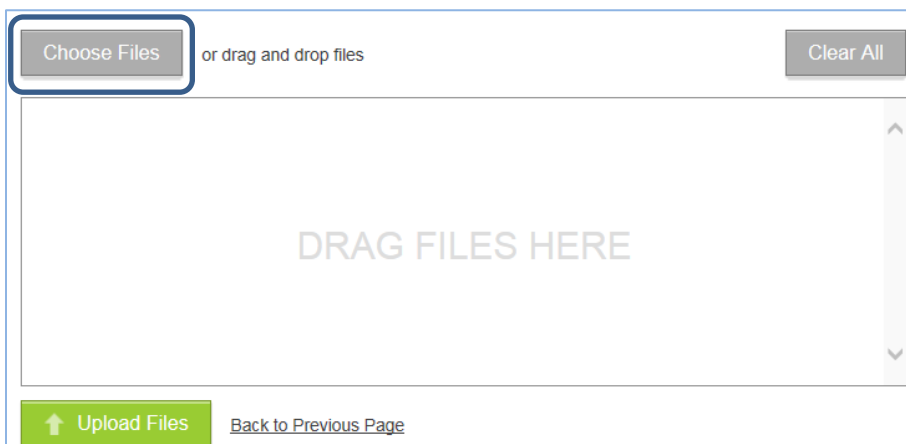
View:  

	Title ▲	MB	Uploaded	Creator
☆ 	123456 - Northwest Bank - ... 	0.03	8/26/14 9:06A	J. Rossenbach
☆ 	123456 - Northwest Bank - ... 	0.85	8/26/14 8:48A	J. Rossenbach
☆ 	555555 - Client XYZ - File T... 	0.18	10/23/14 11:45A	J. Rossenbach
☆ 	555555 - Client XYZ - Final... 	0.00	10/23/14 11:56A	J. Rossenbach
☆ 	987654 - Test Client - File T... 	0.00	10/3/14 7:58A	J. Rossenbach
☆ 	987654 - Test Client - Final... 	0.03	10/3/14 7:59A	J. Rossenbach

- Click **Upload Files** to access the file upload menu.



- Click **Choose Files** and select file(s) in the dialog window that appears, or drag the file(s) into the upload box.



- Now that the file(s) have been selected, click **Upload Files**.
- The file(s) will then appear in the folder that you specified.

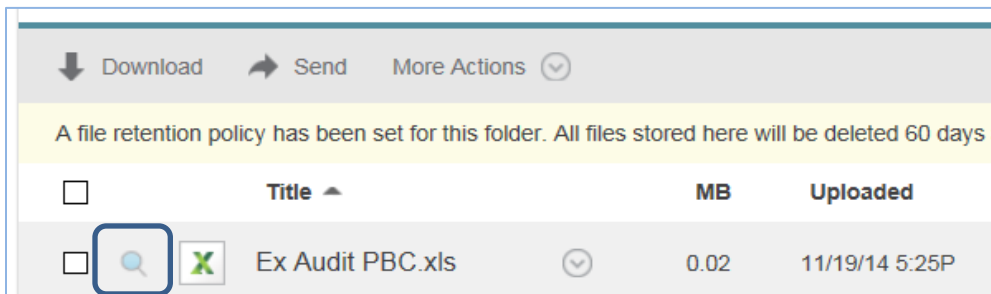
Note: If you do not see the **Upload Files** button, you may not have upload permissions on the selected folder. For assistance for the File Transfer Folder, contact your organization's Client Administrator for the Moss Adams Client Portal, or a member of your Moss Adams LLP client service team; only Moss Adams LLP can upload to the Final Deliverables Folder).


Files can be compressed into a single .zip file, and then uploaded in the zip format. To do so, on a Windows 7 or later PC, copy all of the files you would like to upload into a Windows folder, right-click the Windows folder, and then choose **Send to, Compressed (zipped) folder** and upload the .zip file that is created.


Previewing Files

File previewing is available to any user who has the ability to download items from the folder.

1. To view a **Thumbnail Preview** of a file, **hover** over the **magnifying glass** located to the left of the document's icon.





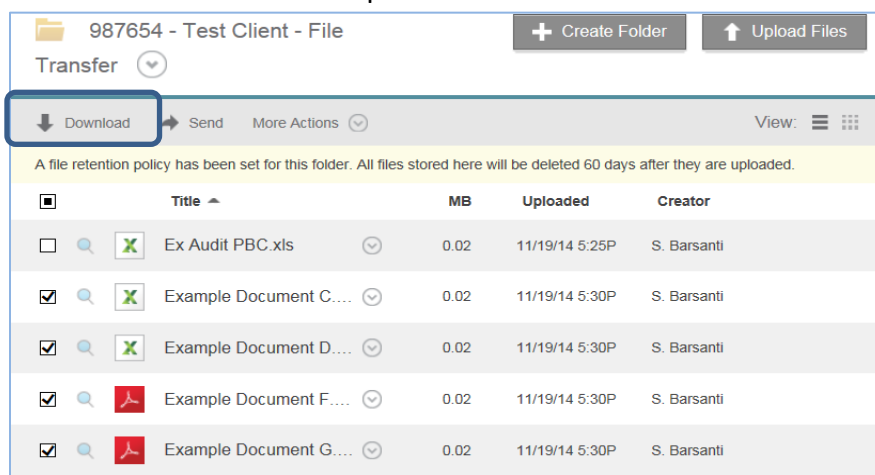
2. To view a **Full Preview** of the document within the Moss Adams Client Portal (without downloading the file), **click** on the **magnifying glass** icon  located to the left of the document's icon.

***Note:** Files with a grayed out magnifying glass icon  cannot be previewed in the Moss Adams Client Portal.*

Downloading Files


To download a **single file**:

1. Click on the folder containing the file you would like to download.
2. Perform any one of the following three options:
 - Option I – **Click the file's name** or **icon** to begin the download.
 - Option II – **Hover** over the **circled down arrow** icon  to the right of the file's name and then click **Download**.
 - Option III – **Check the box** to the left of the magnifying glass icon  and then click the **Download** link at the top of the checkbox column.



3. Follow your Web browser's prompts to **Open or Save** the file.

To download **multiple files**:

1. Click on the folder containing the files you would like to download.
2. **Check the boxes** to the left of the magnifying glass icon  of the files you would like to download and click the **Download** link at the top of the checkbox column.
3. Follow your Web browsers prompts to **Save** the .zip file.
4. On a Windows 7 or later PC, **right-click** on the .zip files and choose **Extract All**.
5. **Choose** the location where you would like the files extracted to and click the **Extract** button.

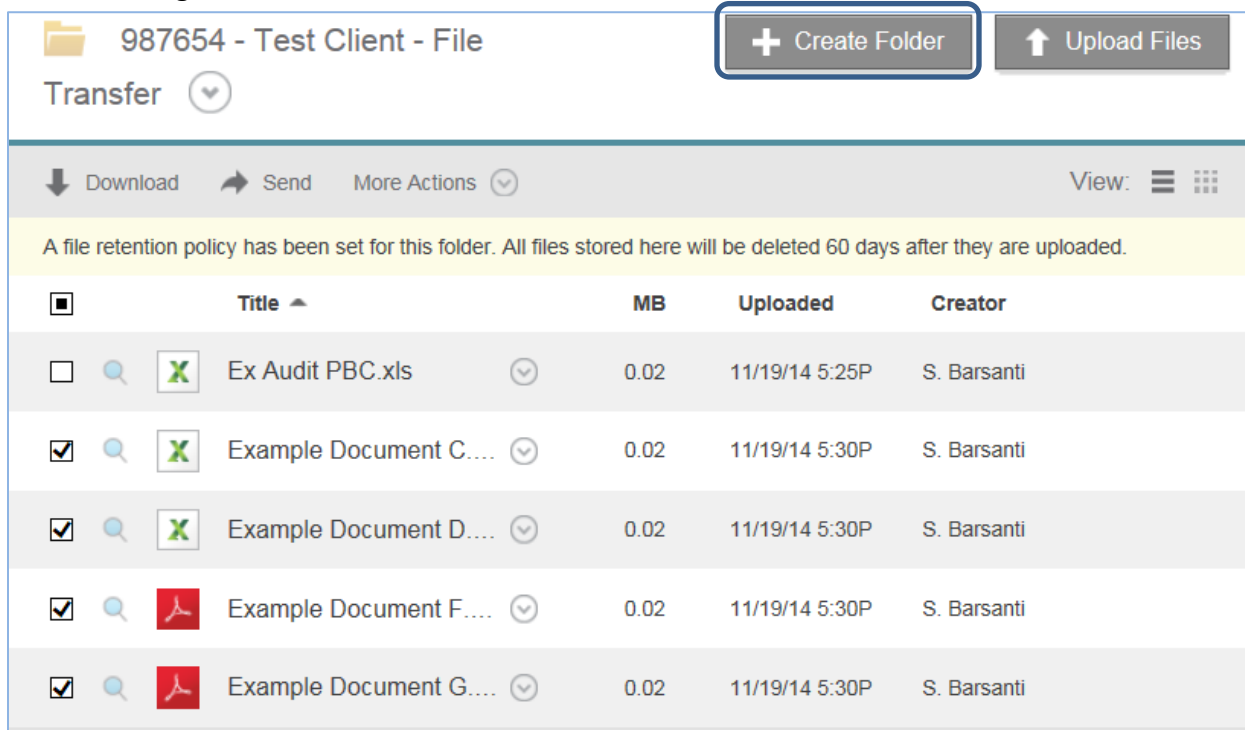
***Note:** If more than one file is downloaded at the same time, the files will be downloaded into a .zip file format. The .zip file will be named according to the Moss Adams Client Portal folder that you are downloading from.*

Subfolders: Creating, Editing, and Deleting

The subfolder function can be used to organize the contents of folders and customize permissions at the subfolder level. Only users with upload permissions may create subfolders.

Create a subfolder:

1. Login to your Moss Adams Client Portal Account
2. Navigate to Folder you wish to add a subfolder to by clicking on its folder name.
3. When viewing the folder, click the **Create Folder** button.



<input type="checkbox"/>	Title	MB	Uploaded	Creator
<input type="checkbox"/>	Ex Audit PBC.xls	0.02	11/19/14 5:25P	S. Barsanti
<input checked="" type="checkbox"/>	Example Document C....	0.02	11/19/14 5:30P	S. Barsanti
<input checked="" type="checkbox"/>	Example Document D....	0.02	11/19/14 5:30P	S. Barsanti
<input checked="" type="checkbox"/>	Example Document F....	0.02	11/19/14 5:30P	S. Barsanti
<input checked="" type="checkbox"/>	Example Document G....	0.02	11/19/14 5:30P	S. Barsanti

4. Enter a Folder Name, and a description if desired, for this new subfolder in the dialogue window that appears.

5. Edit user access and customize their permissions as appropriate.

***Note:** Any folder that you create will automatically inherit the permissions of its parent folder; however, they can be changed through the **View/Edit Folder Access** link within the subfolder.*

Edit, delete, move or copy a subfolder(s):

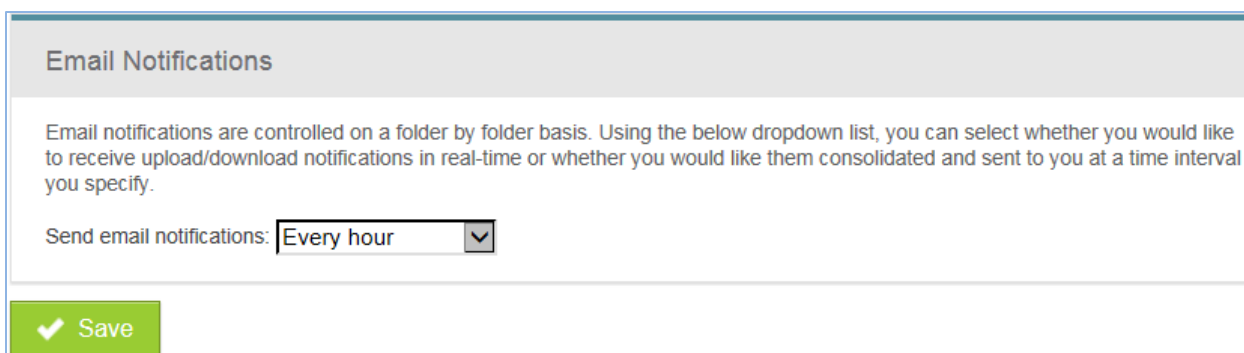
1. Select the check box to the left of the subfolder name and click on the **More Actions** drop down menu.
2. Select which action to perform.

For more information regarding how to change permissions on a folder, see the section below on [Managing Permissions](#).

E-mail Alerts

To adjust your **e-mail alert frequency**:

1. Click the **My Settings** link (located in the top navigation bar).
2. In the Email Notifications section, click the drop down menu next to **Send email notifications** and set your desired e-mail frequency interval:
 - a. In real-time
 - b. Every 15 minutes
 - c. Every hour
 - d. Twice a day
 - e. Once a day
3. Click **Save**.



The screenshot shows a web form titled "Email Notifications". Below the title, there is a paragraph of text: "Email notifications are controlled on a folder by folder basis. Using the below dropdown list, you can select whether you would like to receive upload/download notifications in real-time or whether you would like them consolidated and sent to you at a time interval you specify." Below this text is a label "Send email notifications:" followed by a dropdown menu currently set to "Every hour" with a downward arrow icon. At the bottom of the form is a green button with a white checkmark and the text "Save".

To **enable or disable** your **e-mail notifications** on a folder:

1. Click on the folder in which you would like to enable or disable your e-mail notifications.

2. Below the file and folder list, **check the box(es)** according to your preference:
 - a. Receive an e-mail when a file is: **Downloaded from this folder.**
 - b. Receive an e-mail when a file is: **Uploaded to this folder.**

987654 - Test Client - File

Transfer

+ Create Folder

↑ Upload Files

Download Send More Actions View: [Icons]

A file retention policy has been set for this folder. All files stored here will be deleted 60 days after they are uploaded.

<input type="checkbox"/>	Title	MB	Uploaded	Creator
<input type="checkbox"/>	Ex Audit PBC.xls	0.02	11/19/14 5:25P	S. Barsanti
<input type="checkbox"/>	Example Document C....	0.02	11/19/14 5:30P	S. Barsanti
<input type="checkbox"/>	Example Document D....	0.02	11/19/14 5:30P	S. Barsanti
<input type="checkbox"/>	Example Document F....	0.02	11/19/14 5:30P	S. Barsanti
<input type="checkbox"/>	Example Document G....	0.02	11/19/14 5:30P	S. Barsanti

Email me when a file is: ☒ Downloaded from this folder ☒ Uploaded to this folder

3. Changes will be saved automatically when a box is checked and the page will refresh.

Managing Permissions

Folder Permission Descriptions

- **Download:** User has the ability to download and preview any document in the folder. Without this permission, the user will only be able to see which documents they uploaded.
- **Download Alerts:** User will be notified via e-mail that files have been downloaded from the folder.
- **Upload:** User has the ability to upload files and create subfolders in the folder.
- **Upload Alerts:** User will be notified via e-mail that files have been uploaded to the folder. This permission requires the user to also have the download permission. Users with download permission will also be able to grant themselves this permission through a checkbox on the folder visible on a folder's main Moss Adams Client Portal screen.
- **Delete:** User has the ability to delete files within the folder that they did not upload. This permission requires the user to also have the download permission.

- **Admin:** User has the ability to manage access on the File Transfer Folder and its subfolders, edit some folder options of other users (permissions and alerts) as well as create new users.



Any subfolders created will automatically inherit the parent folder's permissions. If the subfolder's permissions are unique, the Client Administrator must make user permission changes at the subfolder level. See [How to Change a User's Permissions on a File Transfer Folder](#).

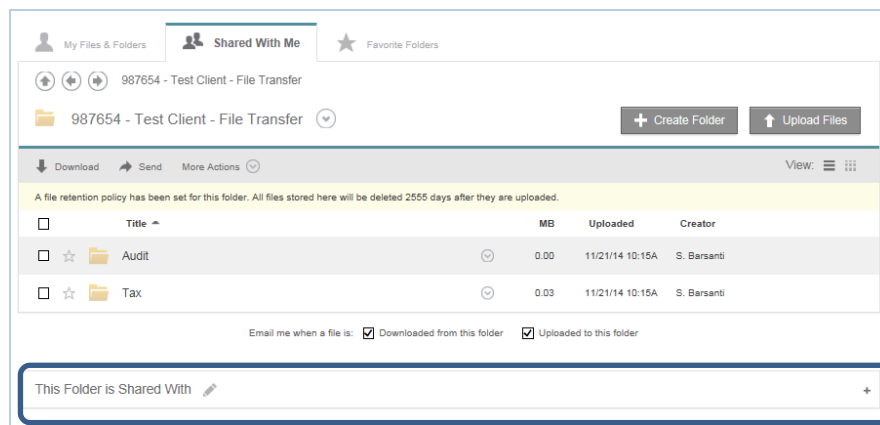
Difference Between Client User and Client Administrator Permissions

Permissions Summary:		File Transfer Folder					Final Deliverables Folder				
Key:		View Users with Access	Download Files	Upload / Create Sub-Folders*	Delete (Files and Sub-Folders)**	Add/Remove Users	View Users with Access	Download Files	Upload / Create Sub-Folders*	Delete (Files and Sub-Folders)**	Add/Remove Users
Client / External User Types:											
Client User		✓	✓	✓	✗	✗	✓	✓	✗	✗	✗
Client Administrator		✓	✓	✓	✓	✓	✓	✓	✗	✗	✗





How to Change a User's Permissions on a File Transfer Folder

**Only Client Administrators and Moss Adams LLP personnel can add or remove users*

1. Click on the desired File Transfer folder.
2. Towards the bottom of your Web browser is a section titled **This Folder is Shared With** that can be expanded to list who currently has access to the selected folder and their permission level.
 - a. Click the plus icon on the right side of the screen to expand the list.








- b. Click the **Pencil Icon** near the section title to edit access and permissions on the selected File Transfer Folder. *(If you don't see the **Pencil Icon** you are not setup as a Client Administrator on this folder. Please contact your organization's Client Administrator for the Moss Adams Client Portal, or a member of your Moss Adams LLP client service team, for assistance.)*

This Folder is Shared With 						
Name	Download	Download Alerts	Upload	Upload Alerts	Delete	Admin
 Super Users	✓		✓		✓	✓
 Rossenbach, Josh (Moss Adams) (...)	✓		✓		✓	✓
 Barsanti, Suzie (Moss Adams LLP)	✓	✓	✓	✓	✓	✓

3. In the **View/Edit Folder Access** dialogue window that appears use the check boxes to add or remove permissions as desired. See [Folder Permission Descriptions](#) for detail of each permission type.

View/Edit Folder Access
Add Users ▼
Notify Selected
Remove Selected






<input type="checkbox"/>	Name	Download	Download Alerts	Upload	Upload Alerts	Delete	Admin	Notify	Remove
<input type="checkbox"/>	 Rossenbach, Josh (Moss...)	✓		✓		✓	✓	→	
<input type="checkbox"/>	 Barsanti, Suzie (Moss Ad...)	✓	<input type="checkbox"/>	✓	<input type="checkbox"/>	✓	✓		✗
<input type="checkbox"/>	 Client, Admin (Northwest...)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	→	✗
<input type="checkbox"/>	 Client, User (Northwest B...)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	✓	<input checked="" type="checkbox"/>	<input type="checkbox"/>	→	✗
<input type="checkbox"/>	 Rutter, Bret (Moss Adams...)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	→	✗

☐ Apply permissions/alerts to existing subfolders

Save Changes Cancel

4. Check **Apply permissions/alerts to existing subfolders** if you would like all of the users displayed in **View/Edit Folder Access** to be granted with those same permissions in the existing subfolders.

View/Edit Folder Access
Add Users ▼
Notify Selected
Remove Selected

<input type="checkbox"/>	Name	Download	Download Alerts	Upload	Upload Alerts	Delete	Admin	Notify	Remove
<input type="checkbox"/>	 Rossenbach, Josh (Moss...)	✓		✓		✓	✓	→	
<input type="checkbox"/>	 Barsanti, Suzie (Moss Ad...)	✓	<input type="checkbox"/>	✓	<input type="checkbox"/>	✓	✓		✗
<input type="checkbox"/>	 Client, Admin (Northwest...)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	→	✗
<input type="checkbox"/>	 Client, User (Northwest B...)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	✓	<input checked="" type="checkbox"/>	<input type="checkbox"/>	→	✗
<input type="checkbox"/>	 Rutter, Bret (Moss Adams...)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	→	✗

☒ Apply permissions/alerts to existing subfolders

Save Changes Cancel



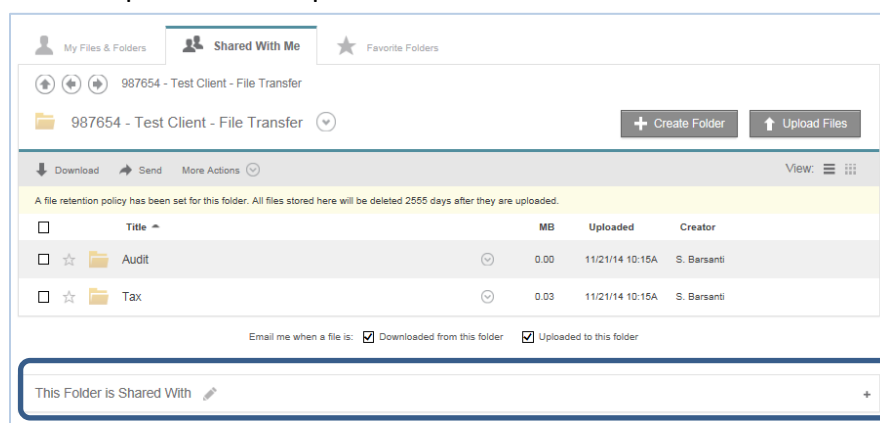
Checking the **Apply permissions/alerts to existing subfolders** box will override subfolder permission settings that may have been intentionally setup to restrict access. Therefore, Client Administrators should be aware of subfolder permission settings before checking the **Apply permissions/alerts to existing subfolders** box.



5. Click **Save Changes**.





Add a New Client User to a File Transfer Folder

**Only Client Administrators and Moss Adams LLP personnel can add or remove users*

1. Click on the File Transfer Folder you would like to add a user to.
2. Towards the bottom of your Web browser is a section titled **This Folder is Shared With** that can be expanded to list who currently has access to the selected folder and their permission level.
 - a. Click the plus icon to expand the list.



- b. Click the **Pencil Icon**  near the section title to edit access and permissions on the selected File Transfer Folder. *(If you don't see the **Pencil Icon**  you are not setup as a Client Administrator on this folder. Please contact your organization's Client Administrator for the Moss Adams Client Portal, or a member of your Moss Adams LLP client service team, for assistance.)*

This Folder is Shared With 						
Name	Download	Download Alerts	Upload	Upload Alerts	Delete	Admin
 Super Users	✓		✓		✓	✓
 Rossenbach, Josh (Moss Adams) (...)	✓		✓		✓	✓
 Barsanti, Suzie (Moss Adams LLP)	✓	✓	✓	✓	✓	✓

3. On the **View/Edit Folder Access** dialogue window that appears, hover over the **Add Users** button, and click **Add Manually**.

987654 - Test Client - File Transfer

View/Edit Folder Access

Add Users ▼

Notify Selected Remove Selected

<input type="checkbox"/>	Name	Upload Alerts	Delete	Admin	Notify	Remove
<input type="checkbox"/>	Super Users	<input type="checkbox"/>	✓	✓		
<input type="checkbox"/>	Rossenbach, Josh (Mc...)		✓	✓	→	
<input type="checkbox"/>	Barsanti, Suzie (Moss Ad...)	✓	✓	✓		✗

Save Changes Cancel

4. Enter the full **Email Address** of the individual that you would like to add to the folder.

987654 - Test Client - File Transfer

Add Folder User

You can add employees or clients to the folder by entering their email address. If the user is new to ShareFile, you may check the box to send them an initial password.

Basic Information

Email Address:*

First Name:*

Last Name:*

Company:

☐ Notify user that he/she has been added to this folder

Add User Cancel

Folder Access Permissions

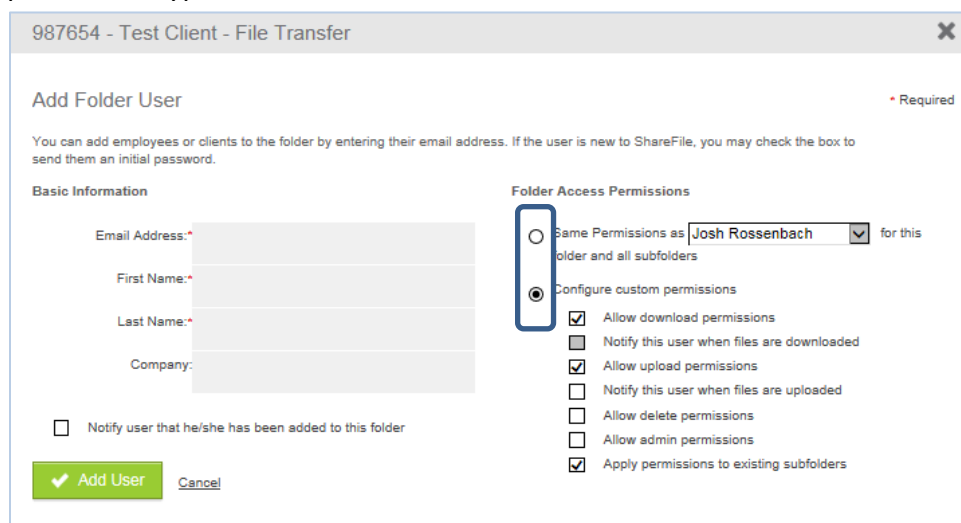
☐ Same Permissions as **Josh Rossenbach** for this folder and all subfolders

☒ Configure custom permissions

- ☒ Allow download permissions
- ☐ Notify this user when files are downloaded
- ☒ Allow upload permissions
- ☐ Notify this user when files are uploaded
- ☐ Allow delete permissions
- ☐ Allow admin permissions
- ☒ Apply permissions to existing subfolders

5. Click the **Tab** key on your keyboard.
 - a. If the user is not already setup within the Moss Adams Client Portal, type in their **First Name**, **Last Name**, and **Company**.
 - b. If the user is already setup within the Moss Adams Client Portal, their name and company information will automatically populate. **Verify** this is the person you are intending to add to the current folder.
6. In the **Folder Access Permissions** section, use the radio buttons to set the new users' permissions as either:
 - a. **Same Permissions as**, and use the drop-down box to select a user already set up with access to be replicated, or

- b. **Configure Custom permissions**, and use the check boxes to add or remove permissions as desired. See [Folder Permission Descriptions](#) for detail of each permission type.



987654 - Test Client - File Transfer

Add Folder User * Required

You can add employees or clients to the folder by entering their email address. If the user is new to ShareFile, you may check the box to send them an initial password.

Basic Information

Email Address:*

First Name:*

Last Name:*

Company:

☐ Notify user that he/she has been added to this folder

☒ Add User [Cancel](#)

Folder Access Permissions

☐ Same Permissions as **Josh Rossenbach** for this folder and all subfolders

☒ Configure custom permissions

☒ Allow download permissions

☐ Notify this user when files are downloaded

☒ Allow upload permissions

☐ Notify this user when files are uploaded

☐ Allow delete permissions

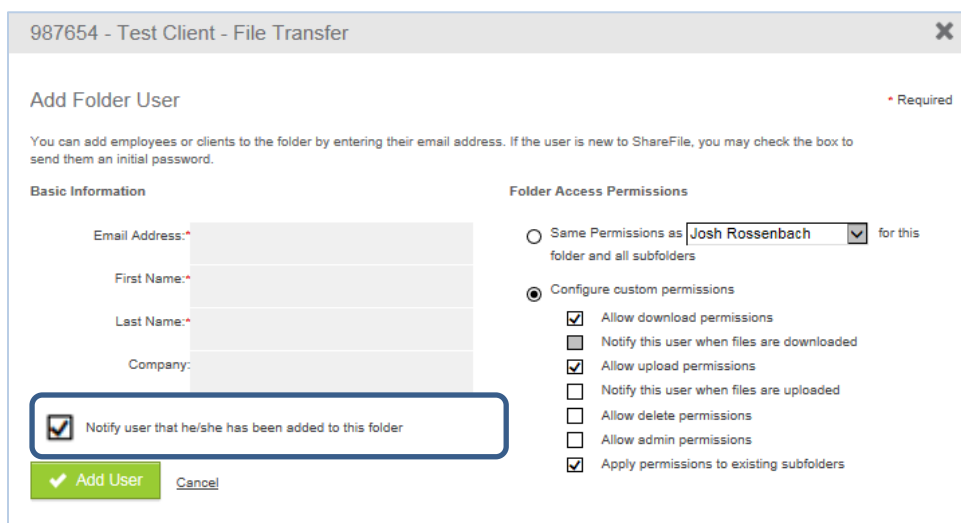
☐ Allow admin permissions

☒ Apply permissions to existing subfolders



The **Allow Admin Permissions** box should remain unchecked for Client Users and be checked only for Client Administrators.

7. To send the user an e-mail notifying them of their access to the folder (for new users the e-mail will include their log in information), check the **Notify user that he/she has been added to this folder** box.



987654 - Test Client - File Transfer

Add Folder User * Required

You can add employees or clients to the folder by entering their email address. If the user is new to ShareFile, you may check the box to send them an initial password.

Basic Information

Email Address:*

First Name:*

Last Name:*

Company:

☒ Notify user that he/she has been added to this folder

☒ Add User [Cancel](#)

Folder Access Permissions

☐ Same Permissions as **Josh Rossenbach** for this folder and all subfolders

☒ Configure custom permissions

☒ Allow download permissions

☐ Notify this user when files are downloaded

☒ Allow upload permissions

☐ Notify this user when files are uploaded

☐ Allow delete permissions

☐ Allow admin permissions

☒ Apply permissions to existing subfolders

- a. If you have selected to send a notification to the user, you will be prompted to enter an optional message.

- b. Click the **Send** button to send the individual an e-mail notification.

Notify Users

We will send these users an email informing them they have been added to this folder along with login information if necessary.

You may optionally enter a custom message before sending.

Optional message to newly added user...

Preview Email

Send Cancel

8. Click **Add User**.

987654 - Test Client - File Transfer

Add Folder User * Required

You can add employees or clients to the folder by entering their email address. If the user is new to ShareFile, you may check the box to send them an initial password.

Basic Information

Email Address:*

First Name:*

Last Name:*

Company:

☐ Notify user that he/she has been added to this folder

Folder Access Permissions

☐ Same Permissions as **Josh Rossenbach** for this folder and all subfolders

☒ Configure custom permissions

- ☒ Allow download permissions
- ☐ Notify this user when files are downloaded
- ☒ Allow upload permissions
- ☐ Notify this user when files are uploaded
- ☐ Allow delete permissions
- ☐ Allow admin permissions
- ☒ Apply permissions to existing subfolders

Add User Cancel

9. On the **View/Edit Folder Access** dialogue window, confirm the new user and their Folder Access has been properly updated.
- a. If there are subfolders (of the current folder) that the user should not have access to, confirm the **Apply permissions to existing subfolders** box located is *unchecked*.

View/Edit Folder Access Add Users Notify Selected Remove Selected

<input type="checkbox"/>	Name	Download	Download Alerts	Upload	Upload Alerts	Delete	Admin	Notify	Remove
<input type="checkbox"/>	Rossenbach, Josh (Moss...)	✓		✓		✓	✓	➔	
<input type="checkbox"/>	Barsanti, Suzie (Moss Ad...)	✓	<input type="checkbox"/>	✓	<input type="checkbox"/>	✓	✓		✕
<input type="checkbox"/>	Client, Admin (Northwest...)	✓		✓		✓	✓	➔	✕
<input type="checkbox"/>	Client, User (Northwest B...)	✓		✓	✓	✓	<input type="checkbox"/>	➔	✕
<input type="checkbox"/>	Rutter, Bret (Moss Adams...)	✓	<input type="checkbox"/>	✓	<input type="checkbox"/>	✓	✓	➔	✕

☐ Apply permissions/alerts to existing subfolders

Save Changes Cancel



Any subfolders created will automatically inherit the parent folder's permissions. If the subfolder's permissions should be unique, the Client Administrator must make user permission changes at the subfolder level. See [How to Change a User's Permissions on a File Transfer Folder](#).

10. Click **Save Changes**.

<input type="checkbox"/>	Name	Download	Download Alerts	Upload	Upload Alerts	Delete	Admin	Notify	Remove
<input type="checkbox"/>	Rossenbach, Josh (Moss...)	✓		✓		✓	✓	→	
<input type="checkbox"/>	Barsanti, Suzie (Moss Ad...)	✓	<input type="checkbox"/>	✓	<input type="checkbox"/>	✓	✓		✗
<input type="checkbox"/>	Client, Admin (Northwest...)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	→	✗
<input type="checkbox"/>	Client, User (Northwest B...)	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	✓	<input checked="" type="checkbox"/>	<input type="checkbox"/>	→	✗
<input type="checkbox"/>	Rutter, Bret (Moss Adams...)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	→	✗

☐ Apply permissions/alerts to existing subfolders

Add a New Client Administrator to a File Transfer Folder

**Only Client Administrators and Moss Adams LLP personnel can add or remove users*

1. Follow the steps 1 through 5 as listed under [Add a New Client User to a File Transfer Folder](#).
2. In the **View/Edit Folder Access** dialogue window, check the box for **Admin**. (This will provide the individual with [Admin](#) permissions as noted above.)
3. Follow the steps 6 through 11 as listed under [Add a New Client User to a File Transfer Folder](#).



The **Client Administrator** is the primary client user who manages portal access for others in your organization. The Client Administrator should maintain strong controls over access to the portal.