

File Exchange Service

(Secure Large File Transfer and Quickbooks users file backup)

User Training Guide

Version 1.1

Instructions Include:

- Logging on
- Home page navigation
- Access, open, and review files
- Working with files

Helpline - (860) 228-1040

MKS



Investment Management, Inc.
Registered Investment Advisor

“File Exchange Service” - access and how to get around

LOGGING IN

Go to: www.2281040.com

- Click on “Client Center” ①

<p>D A David & Associates, Inc.</p> <p><i>Business</i></p> <p>&</p> <p><i>Tax Services</i></p> <p><input type="button" value="Enter"/></p>	<p>MKS Investment Management, Inc.</p> <p><i>Fee-Only Financial Planning Services</i></p> <p>For Individuals and Small Businesses</p> <p>The information on this website is intended for use only by residents of Connecticut. Securities related services may not be provided to individuals that do not reside in Connecticut.</p>
<p><u>Client Center</u> ①</p> <p><i>Private Access Online for your tax & financial documents</i></p> <p><i>File Transfer & Secure Messaging</i></p>	<p><i>PO Box 1554</i></p> <p><i>Hebron, CT 06248</i></p> <p><i>860-228-1040</i></p>

- Click on “File Exchange Service” ②

<p><u>Client Private Page</u></p>	<p>Your Personal Page</p> <ul style="list-style-type: none"> • Send & receive secure notes and small files. • Keep track of Active tasks • Access Your Financial Reports & Tax Records. 	<p><i>Designed for all Clients.</i></p> <p><u>View User Guide</u></p>
<p><u>MKS TD Ameritrade VEO Login</u></p>	<ul style="list-style-type: none"> • Access your TD Ameritrade accounts • Review TD Ameritrade Statements 	<p><i>For Clients with investments at TD Ameritrade</i></p>
<p><u>MKS Portfolio Reports</u></p>	<ul style="list-style-type: none"> • Online Access to Selected Portfolio Reports 	<p><i>For our Investment Management Clients</i></p>
<p><u>MKS Financial Planning System Access</u></p>	<ul style="list-style-type: none"> • Review / Update your financial plan • Enter budget information. 	<p><i>For our financial planning Clients.</i></p>
<p><u>File Exchange Service</u> ②</p>	<ul style="list-style-type: none"> • Large File Transfers • Quickbooks users file backup. 	<p><i>For our business Clients</i></p> <p>User Guide Coming Soon</p>

“File Exchange Service” - access and how to get around

LOGGING IN (continued)

- Enter “*User Name*” ③
- Enter “*Password*” ④
- Click “*Sign In*” ⑤

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2281040 File Server

Username ③ Password ④

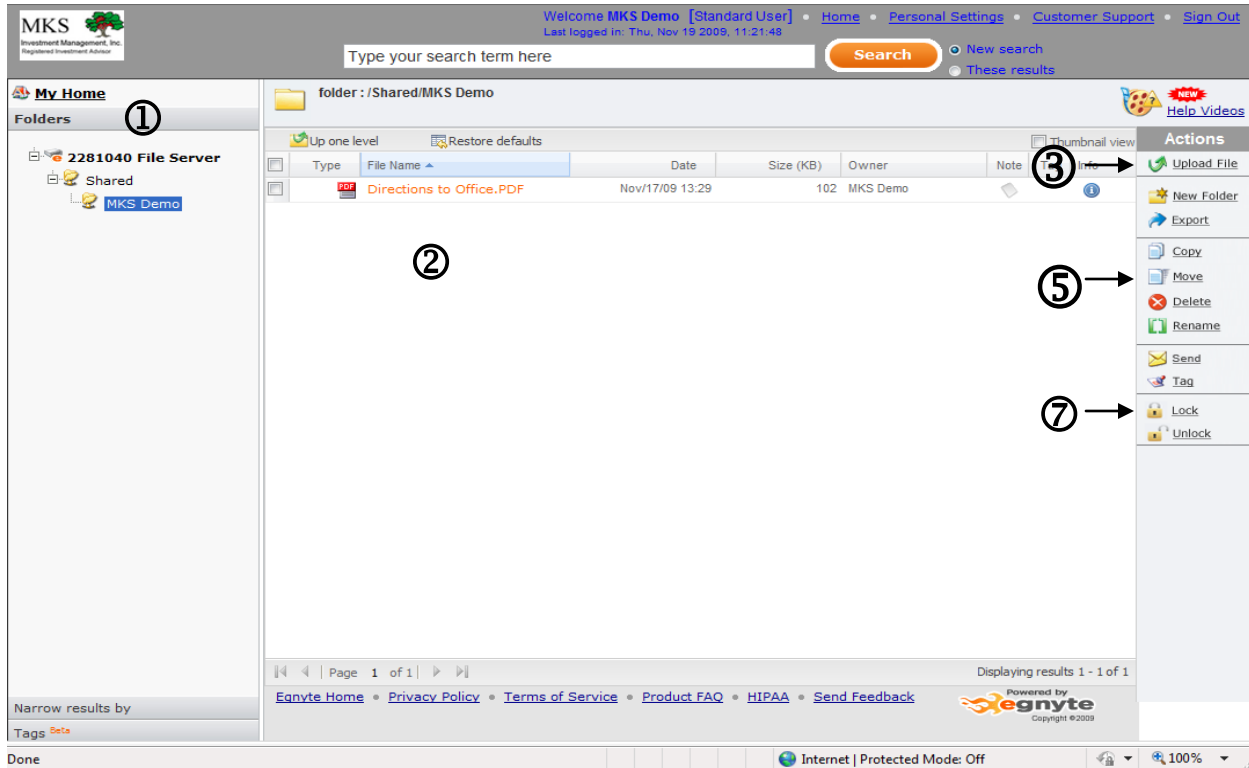
Remember me [Forgot username or password?](#)

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“File Exchange Service” - access and getting around

Home Page



Page Referencing

- Folder and sub-folder directory tree ①
- Folder and file listing ②
- Retrieve a file from your PC and upload ③

Actions

- New folder - create a new folder ④
- Export - export a file
- Copy- duplicate a file ⑤
- Move - move a file
- Delete - delete a file
- Rename - rename a file
- Send - send/e-mail a file ⑥
- Tag -
- Lock - lock a file ⑦
- Unlock—unlock a file

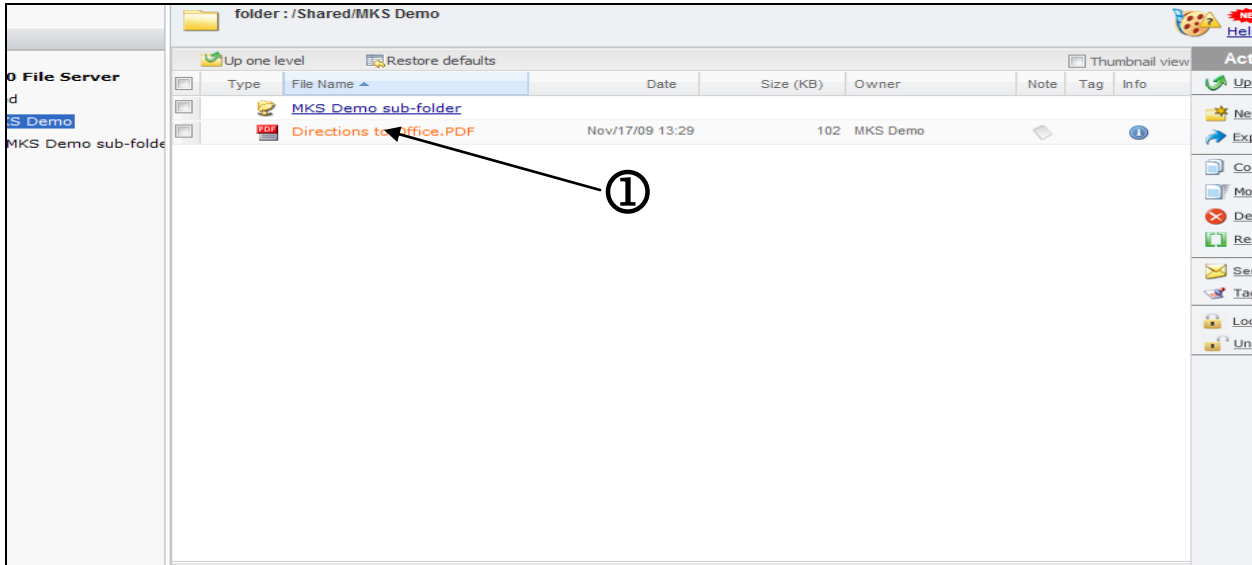
NOTE: all information shown is sent through a secure network

“File Exchange Service” - access and getting around

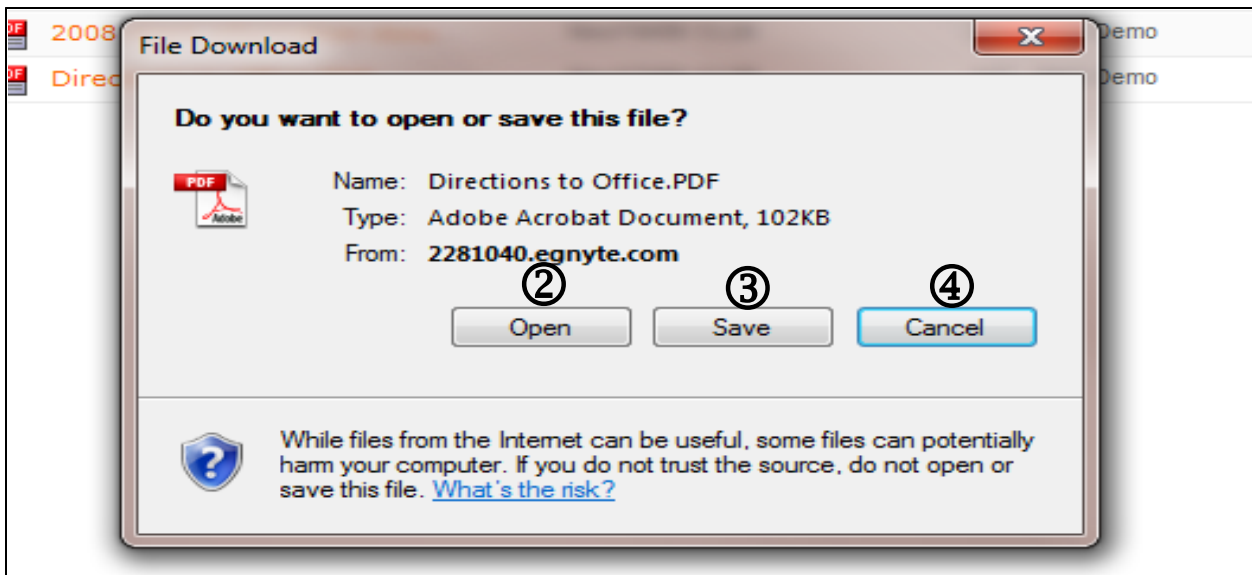
Working with files

To open a file

- Click on desired file within listing ①



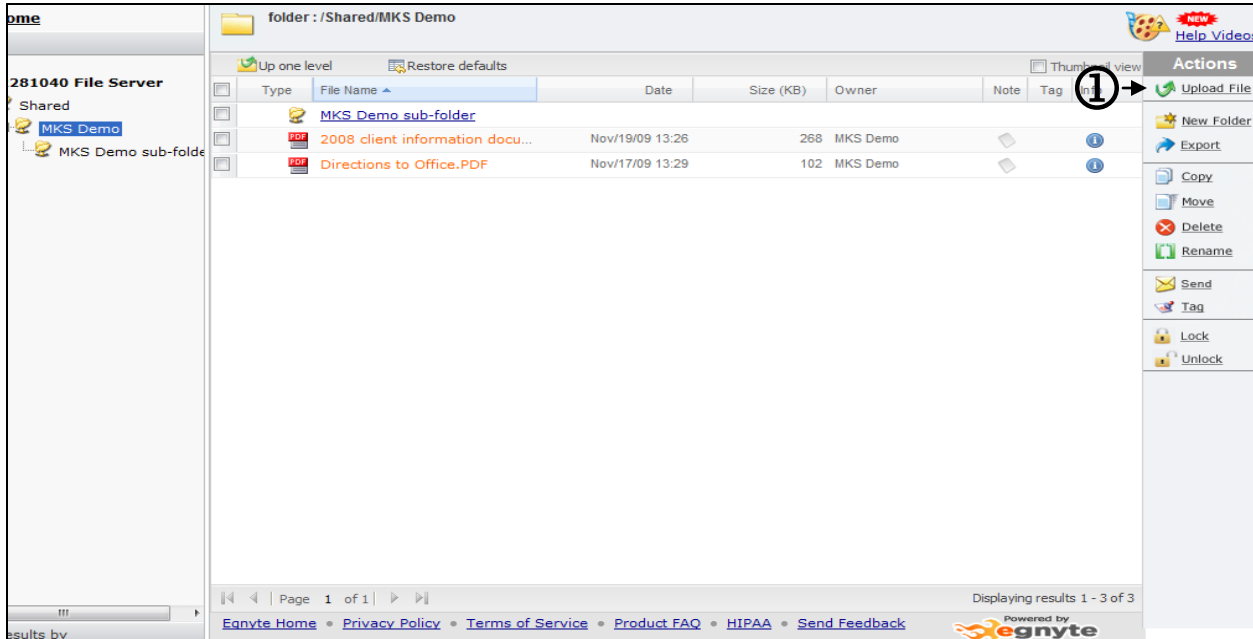
- Select “*Open*” to view file ②
- Select “*Save*” to copy file to your computer. ③
- Select “*Cancel*” to abort download ④



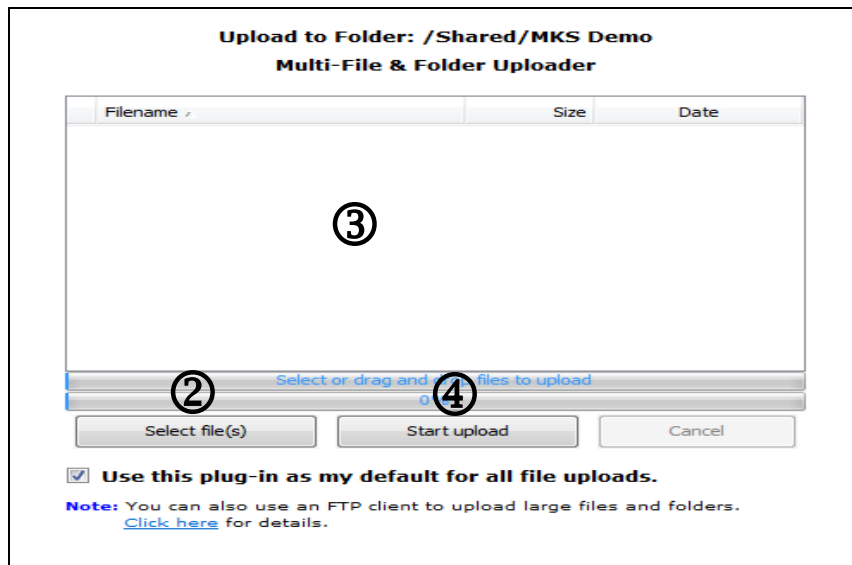
Working with files (continued)

To upload a file from your computer and forward

- Click on “**upload file**” under “ACTIONS” ①



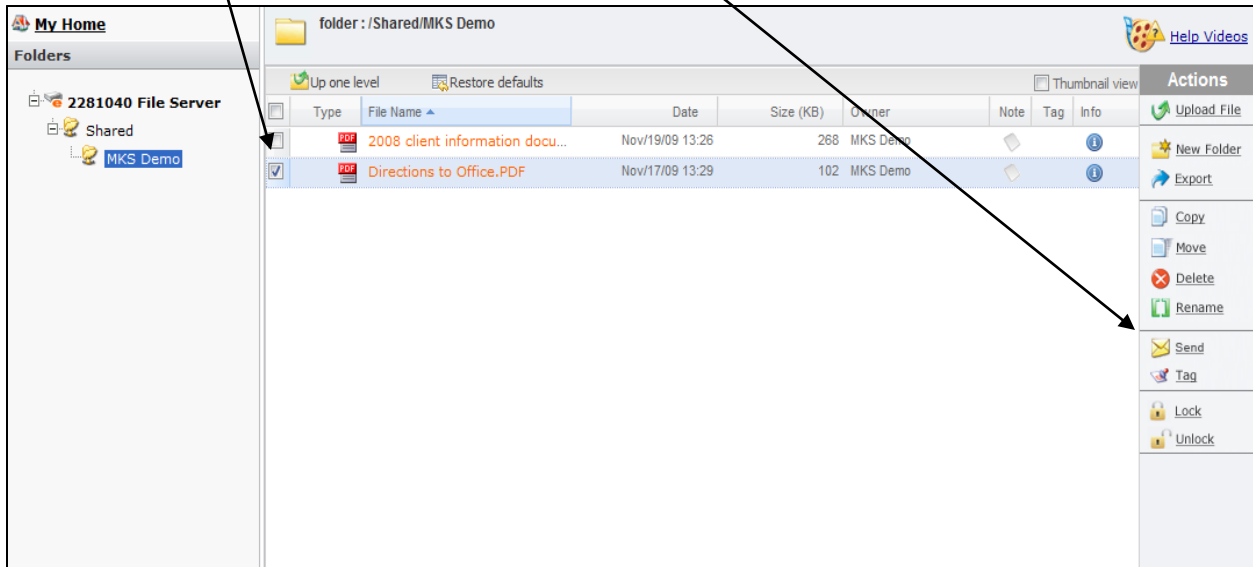
- Click on “**Select file(s)**” to browse your computer. ②
- Once file is located, either click or drag and drop files to file listing box. ③
- Click on “**Start upload**” once file selection has been verified ④



Working with files (continued)

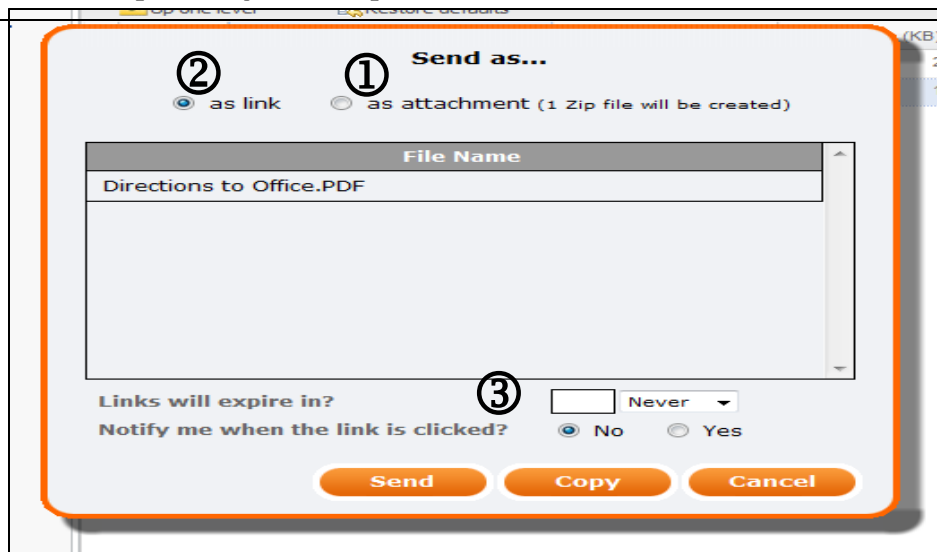
To send a file

► Select the desired file(s) then click on **Send**



► Next select either “as attachment” or “as link”

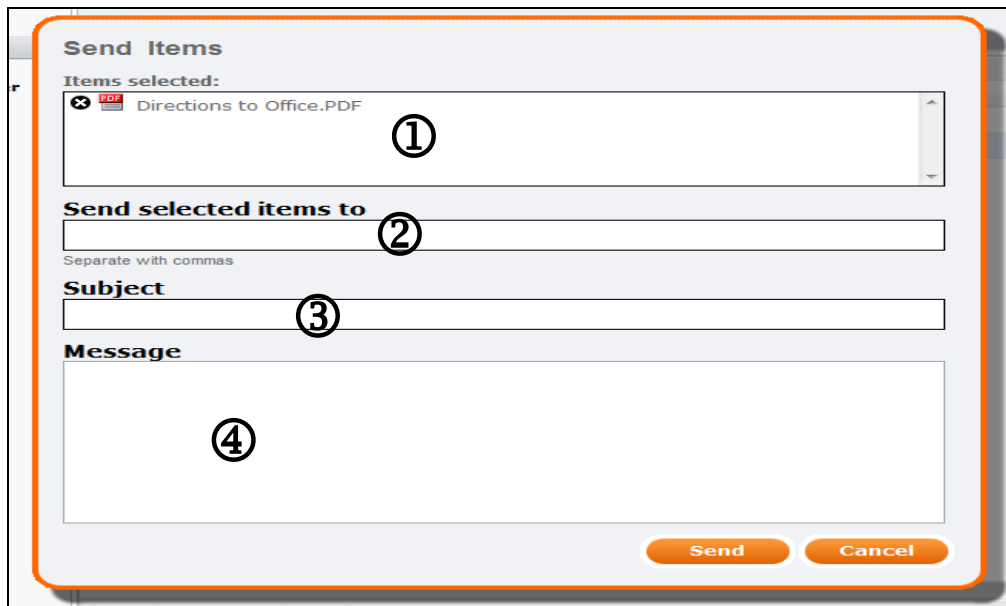
- **To send an attachment** – in which case an email is sent to a recipient with the chosen files as an attachment. ①
- **To send a link** – in which case a URL address is sent to the recipient. When the recipient clicks the URL address the file is downloaded without having to login. ②
 - a. Links can optionally have expiration dates ③



Working with files (continued)

As an attachment:

- Selected file(s) will appear in this box ①
- Type in destination e-mail address(s) ②
- Enter in subject ③
- Enter message in message box ④



As a link:

- An email message will appear with URL address link embedded. ⑤
- Complete email (recipient e-mail address, message, etc)

