

Client Instructions for Using the NetClient - File Exchange

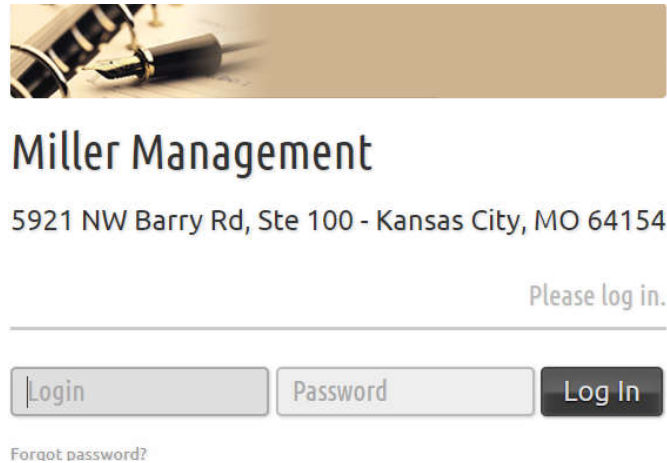
What is the NetClient – File Exchange?

NetClient - FileExchange is a secure way to share files between Miller Management and our clients.

To use the File Exchange go to the following website:

<https://secure.netlinksolution.com/nextgen/>

The login screen will appear...



Miller Management
5921 NW Barry Rd, Ste 100 - Kansas City, MO 64154

Please log in.

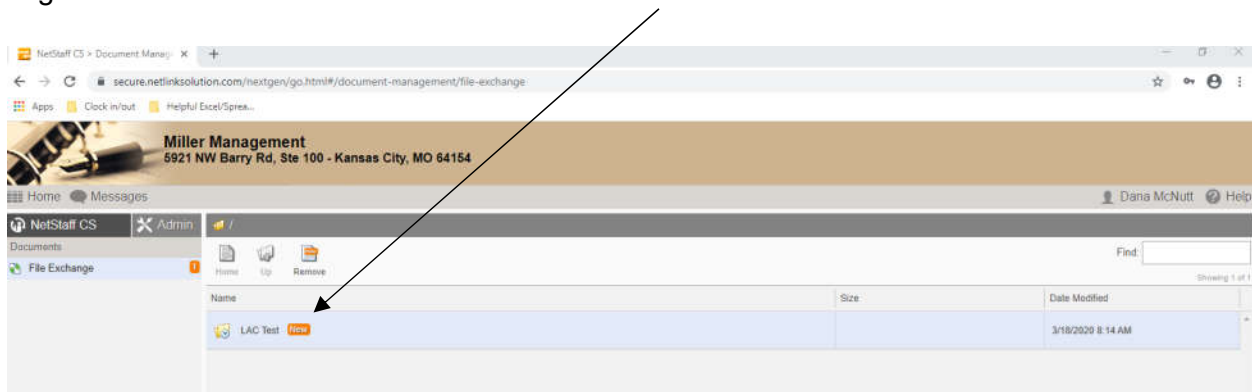
Login Password Log In

Forgot password?

Login:

- Login: Your email address or username created at registration
- Password: A temporary password is sent during registration and is required to be changed upon initial login

Upon login, you will see the home screen. This screen will list any folders or documents you can access. Any new documents uploaded by MM will be designated with the orange “New” flag.



Miller Management
5921 NW Barry Rd, Ste 100 - Kansas City, MO 64154

Home Messages

NetStaff CS Admin

Documents

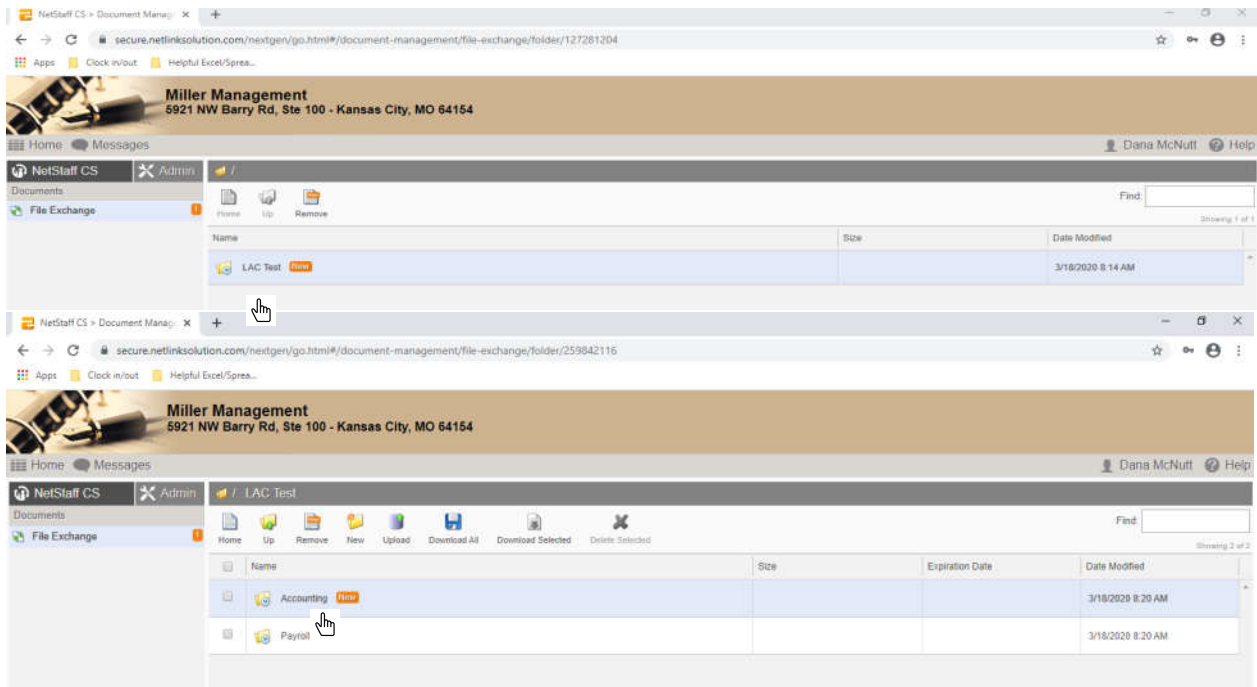
File Exchange

| Name | Size | Date Modified |
|---------------------|------|-------------------|
| LAC Test New | | 3/18/2020 8:14 AM |

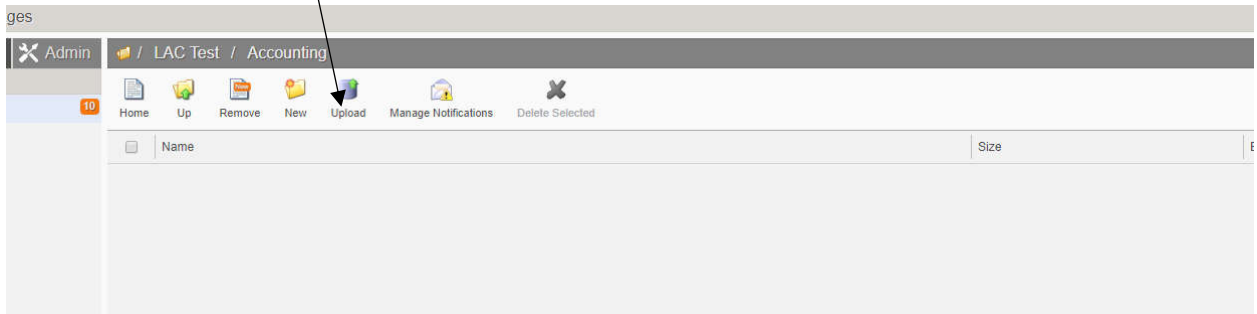
Uploading Files:

To put files in the File Exchange:

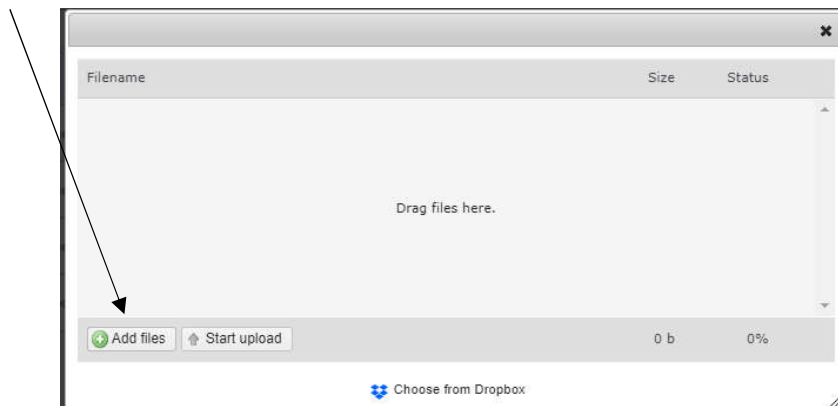
1. **Navigate** to the folder you want to upload a document into. In the example below, I clicked on Home\LAC Test\Accounting



2. Choose the **“Upload”** icon. A popup will appear that will allow you to choose the files to be uploaded.



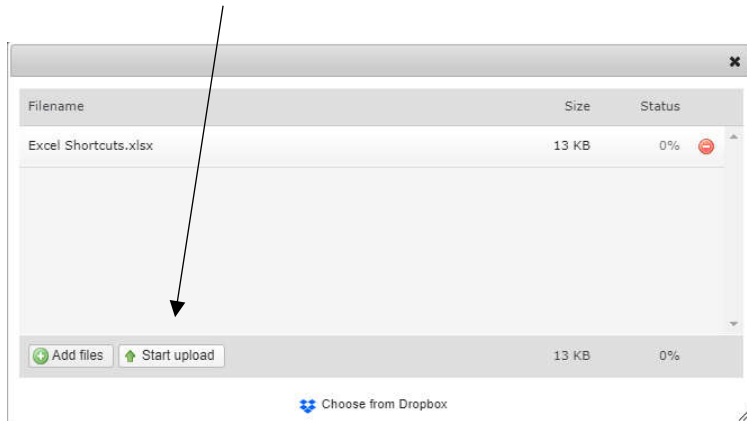
3. A popup will appear that will allow you to choose the files to be uploaded. Click **Add Files** and navigate to the file you would like to put on File Exchange.



4. Highlight the file(s) you would like to upload and click **Open** on the dialog box. The selected files will be moved into the Upload dialog box, as illustrated below.

➤ You can select more than one by holding down the control key while clicking on the files.

5. Click **Start Upload**



The files will now be available in the File Exchange. (Note: The individual who uploads will not see a “New” designation on the files.)

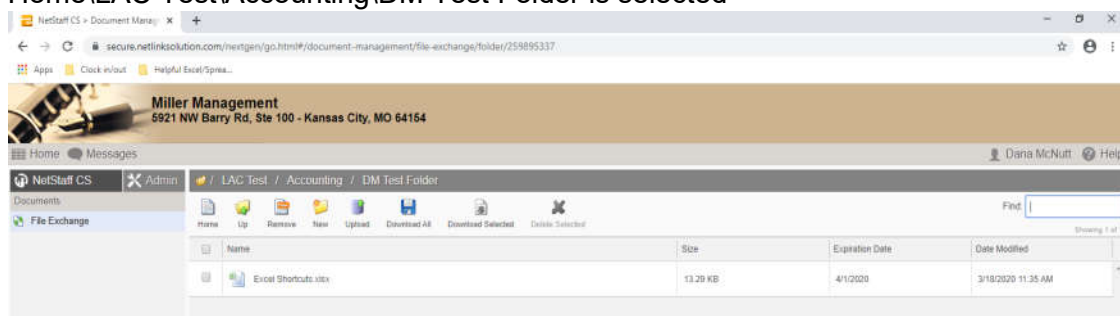
Tip: You must be in the folder location you want the file to be uploaded to. You cannot move files from one folder to another once uploaded. If uploaded to the wrong folder, simply delete and re-upload.

Additional Notes:

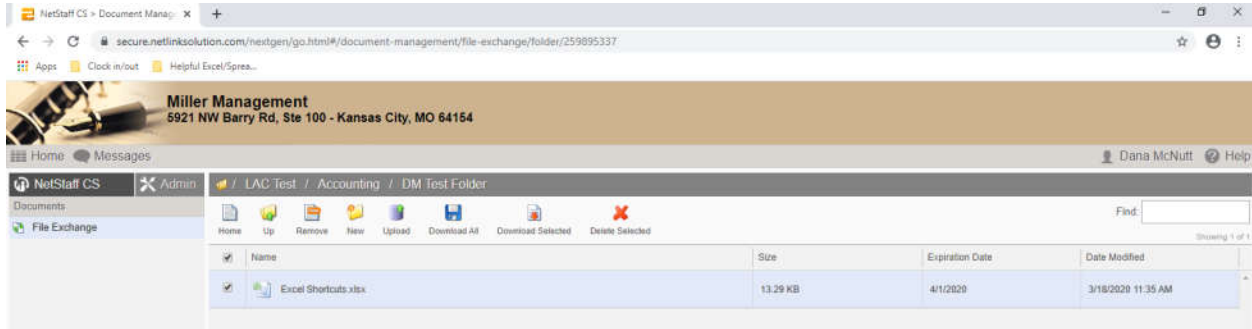
- Home – Takes you back to the home screen
- Up – Takes you up one level in the hierarchy. In the above example, “UP” would take you to the LAC Test folder
- Remove – Removes the orange NEW designation from ALL files in that folder
- New – Creates a new folder (not a new document)
- Upload – Allows files to be put into File Exchange and shared with MM
- Manage Notifications – This is being managed centrally for now
- Delete Selected – Removes the file from the file exchange portal (check box must be selected). **Be careful: Entire folders can be deleted.**

To retrieve a file from the File Exchange:

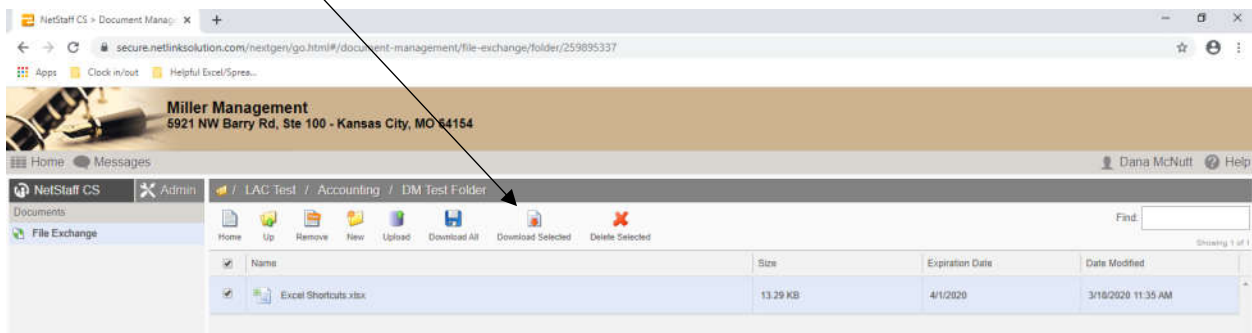
1. Follow the steps above to **navigate** to the desired folder. In the example below: Home\LAC Test\Accounting\DM Test Folder is selected



2. Select the files to be downloaded by checking the box next to the file name.



3. Click on the **Download Selected** icon



4. The files will download into the computer's default download folder. Double click on the file download notification or navigate to the default download folder.

5. Select the downloaded file(s) and save them in the appropriate location on your network drive.

Tips:

- *If you receive an email notification when a new document has been uploaded, clicking on the hyperlink will take you directly to the new file.*
- *Columns can be sorted by file "Name", "Size", "Expiration Date", or "Date Modified" by clicking on the respective column title.*