



# Quick Start Guide

## FOR ADMIN USERS

In this quick start guide on how to use Primeshare, you'll learn the essential features of Primeshare's secure drive and secure client portal. This user guide will explain everything you need to know to get started.



**Primeshare, Inc**  
Silicon Valley Center, 2570 North 1st Street Suite 204, San Jose, CA 95131, USA  
[www.primeshare.net](http://www.primeshare.net)

## Contents

<b>Getting Started with Primeshare .....</b>	<b>3</b>
<b>Store and Organize Files and Folders on Primeshare Secure Drive .....</b>	<b>4</b>
Create a Folder on Secure Drive.....	4
Upload Files to a Folder on Secure Drive.....	6
Share Files or Folders with Primeshare .....	7
Copy/Move Files or Folders to Another Folder.....	12
<b>Manage Your Secure Client Portal.....</b>	<b>15</b>
Create Your Client Portal .....	15
Customize Client Portal and Add Your Own Logo.....	16
Add/Invite Users to Your Client Portal.....	17



# Getting Started with Primeshare

Primeshare is a secure and simple file sharing platform for businesses and individuals. Primeshare's [Secure Client Portal](#) provides a holistic and flexible platform that includes a Secure Drive, Customized Portal for clients, Secure Email, and Secure File Request.

Primeshare is the only file sharing platform that allows you to create your own client portal in minutes. It provides best-in class security and allows you to choose where to store files—in the cloud, on premise, or a Hybrid model). Primeshare requires no software to download or install, reducing the hassle for all end users. It is simple, intuitive and effective, and supports all major Operating Systems including Windows, MacOS, IOS, Android and Linux.

Primeshare also makes it easy to securely share files with clients, colleagues and family members. In addition to secure file sharing, you also have full control over your shared files. You can organize all your files in one place and link authorized users and collaborators to the files you want them to have access to. Primeshare's file access features can be controlled by location, password, or expiration date. You can define who can see or download your files. Primeshare generates activity reports on all files and you can choose to receive email alerts and notifications when your recipients view shared files.

Furthermore, with Primeshare's [Secure File Request](#) feature, you can initiate file requests to your clients or colleagues which helps enable them to send requested files securely and on time. Primeshare also gives you the option to automatically send text and email reminders to your clients until the requested files are uploaded.

Finally, Primeshare's platform is designed to provide you with access policies for when, where and how users can access your content. Clients and collaborators do not need a Primeshare account to securely send or receive files.

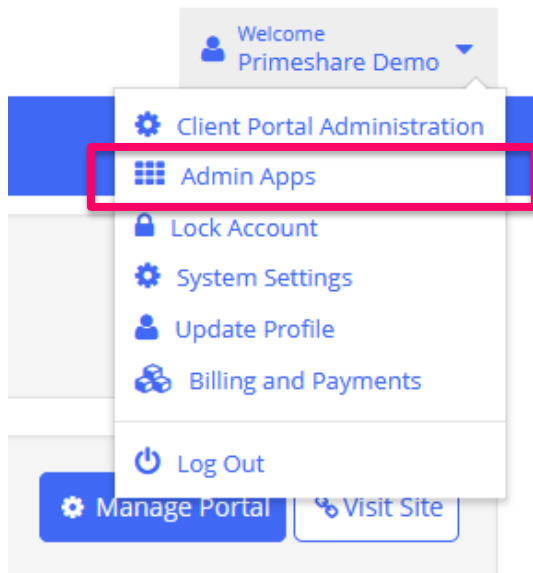


# Store and Organize Files and Folders on Primeshare Secure Drive

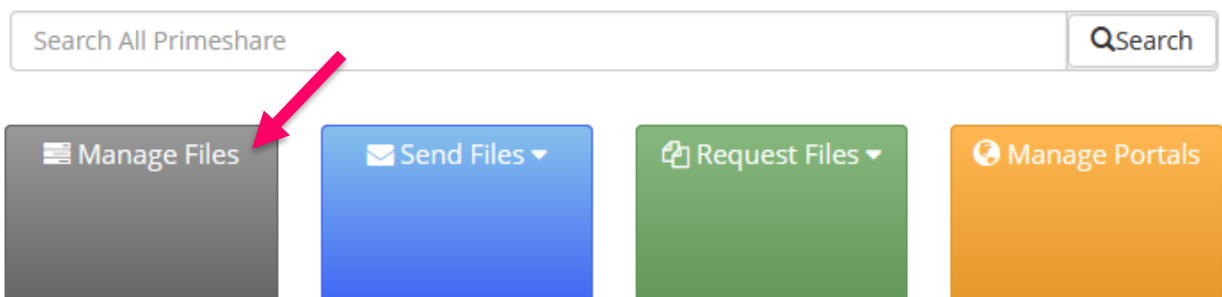
Store and access your files in one secure place. Primeshare's Secure Drive is a platform where you can store and organize all your files in one place and link authorized users and collaborators to the files you want them to have access to.

## Create a Folder on Secure Drive

1. Go to [www.primeshare.net](http://www.primeshare.net) and login with your Primeshare account.
2. From the menu options where your user ID is displayed, Select **"Admin Apps"**.



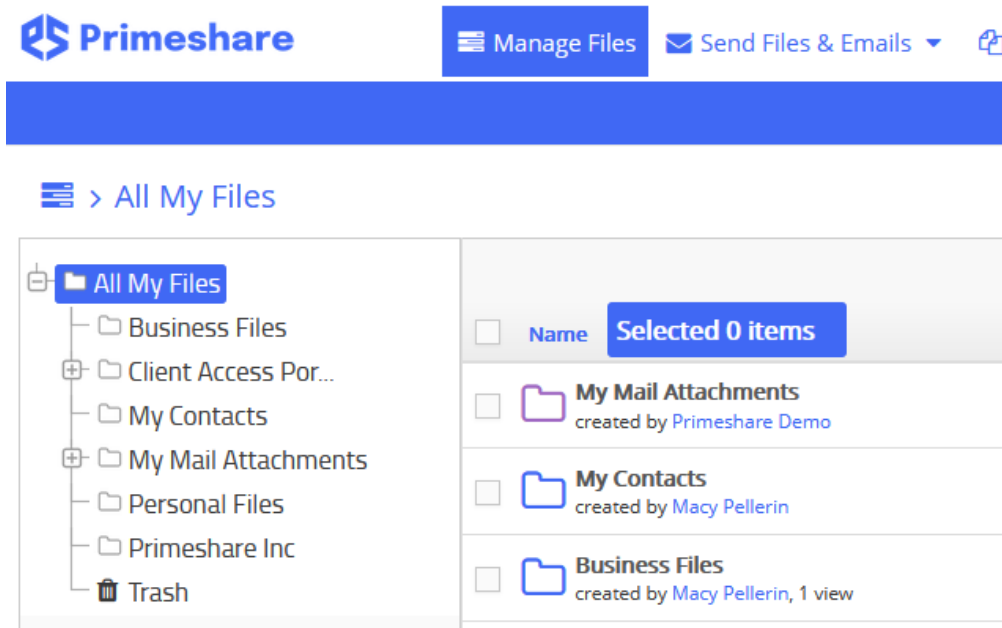
3. Click **"Manage Files"**.



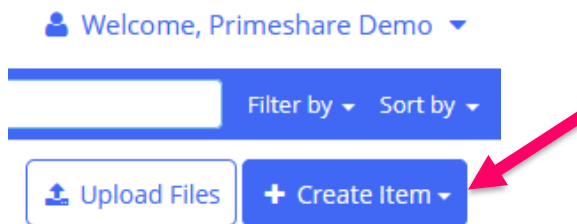
Need Help? [Contact Support](#) or view [Quick Start Guides](#)



4. Select where you want to store your folder.

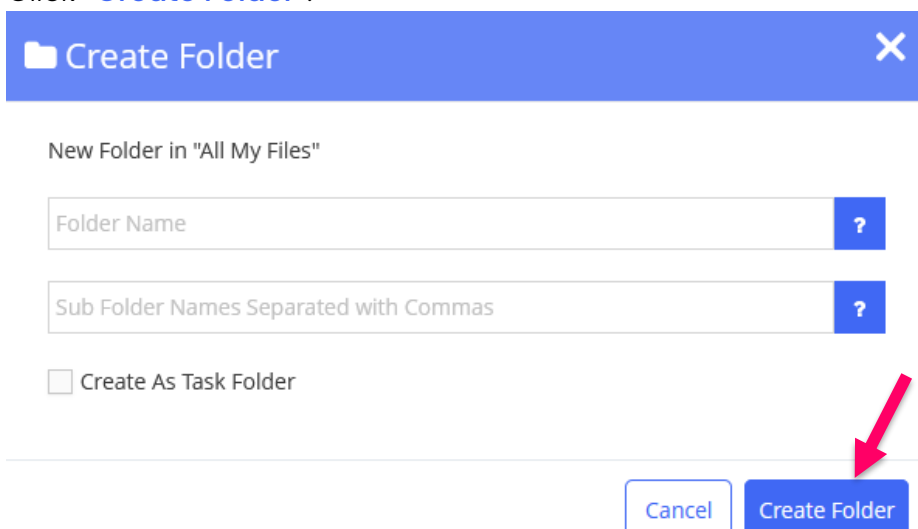


5. Click "Create Item → Create Folder".



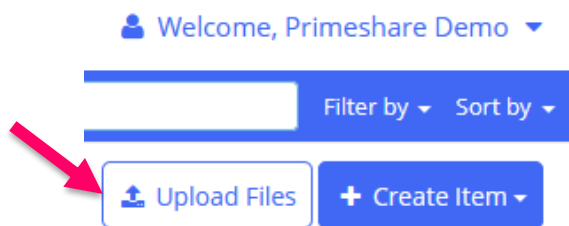
6. Set **Folder Name** and/or **Create Sub Folder**.

7. Click "Create Folder".

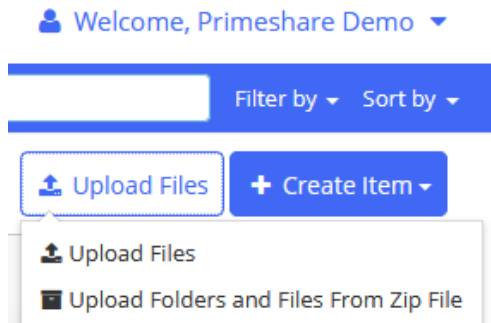


## Upload Files to a Folder on Secure Drive

1. Go to [www.primeshare.net](http://www.primeshare.net) and login with your Primeshare account.
2. From the menu options where your user ID is displayed, Select "**Admin Apps**".
3. Click "**Manage Files**".
4. On **Secure Drive**, select the folder where you want to store or upload your file.
5. Click "**Upload Files**"



6. Select "**Upload Files**" or "**Upload Folders and Files From Zip File**"




- **Upload Files** option uploads any file in the folder.
- **Upload Folders and Files From Zip File** option extracts the files and folders from a compressed file and uploads it onto your Primeshare Secure Drive.

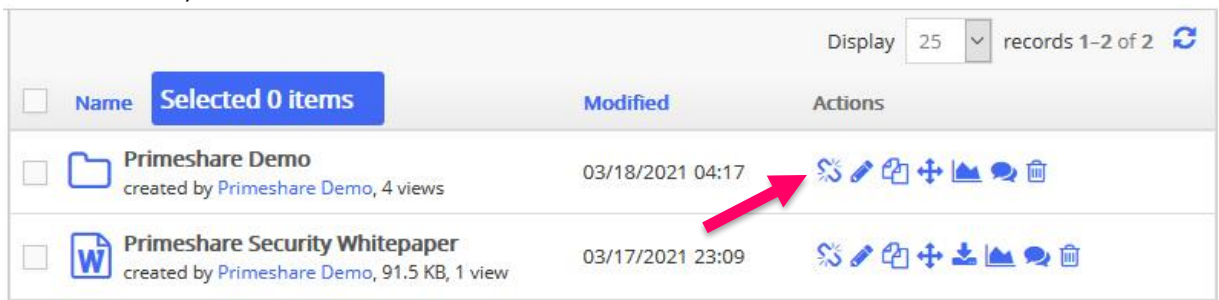
### Sample Scenario:

If you upload **training.zip** using the "**Upload Files**" option, the **training.zip** file will not be extracted and will be uploaded onto your Secure Drive "**as is**". However, if you choose the "**Upload Folders and Files From Zip File**" option to upload your **training.zip** file, all files and folders in the **training.zip** file will be extracted and will be uploaded onto your Secure Drive.



## Share Files or Folders with Primeshare

1. Go to [www.primeshare.net](http://www.primeshare.net) and login with your Primeshare account.
2. From the menu options where your user ID is displayed, Select **"Admin Apps"**.
3. Click **"Manage Files"**.
4. On Secure Drive, locate and select file(s) or folder(s) you want to share.
5. **Share Single File/Folder**
  - a) On the item you want to share, click **"Get Item Link"**  icon.



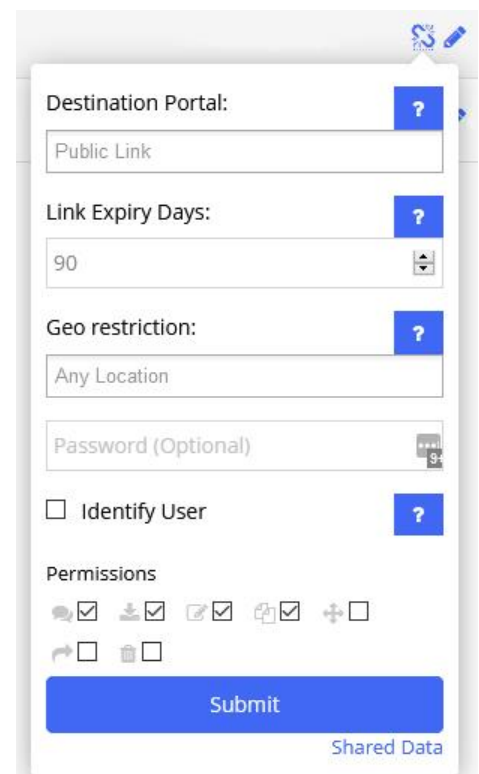
- b) Define **Access Policy** on the item to be shared.


b.1 Set the **Destination Portal**

- **Public Link (Default)** means when the recipient clicks on the shared link, Primeshare will not ask for a portal login. They will be able to access and view the shared file directly. (example: clients that don't need a Primeshare account but that are sending you sensitive files)


**Sample Scenario:**

If you share **Primeshare Demo** folder and chose the **Public Link** option in the **Destination Portal**, the recipient will be able to access and view the shared file directly when the recipient clicks on the **Share Link**.




Destination Portal: 


Public Link


Link Expiry Days: 

90

Geo restriction: 

Any Location

Password (Optional) 

☐ Identify User 

Permissions

☒ View ☒ Download ☒ Edit ☒ Share ☐ Move ☐ Copy ☐ Trash

☐ ☐

**Submit**

Shared Data



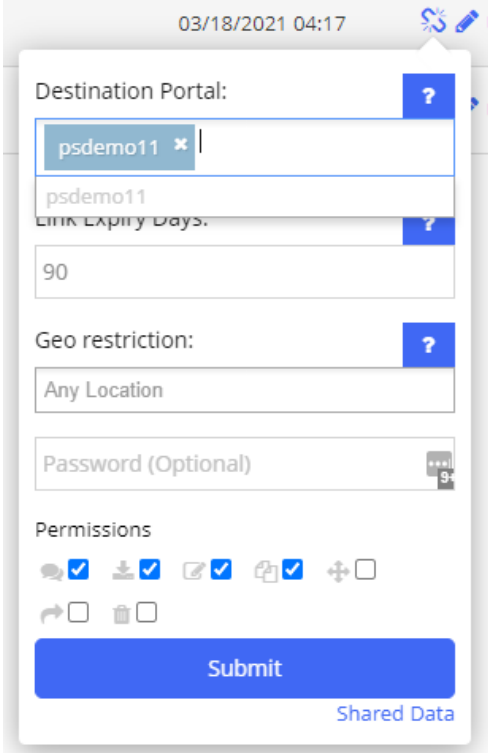
Hence, the recipient does not need to sign up for a Primeshare account or enter login information.

- If a **Client Portal** is selected, then only the added users in the selected portal can access and view the shared file. The portal users are still required to login. Learn how to setup your client portal in [Secure Client Portal](#) section of this guide.

#### Sample Scenario:

If you want to share **Primeshare Demo** folder to all the users added in a specific client portal, select or enter the name of the client portal in the **Destination Portal**.

In the image, we have a client portal called **psdemo11** entered in the **Destination Portal**. With this, all the users added in the **psdemo11** portal will have access to the shared file. Hence, when these users click on the **Share Link**, they will be required to enter their portal login information to view and access the shared file.



03/18/2021 04:17

Destination Portal: ?

psdemo11 x |

psdemo11

Link Expiry Days: ?

90

Geo restriction: ?

Any Location

Password (Optional) 94

Permissions

☒ ☒ ☒ ☒ ☐ ☐

☐ ☐

Submit

Shared Data

b.2 Set **Link Expiry Days**.

Establish when the **Share Link** will expire — after the set number of days the link will no longer be available.

b.3 Set **Geo Restriction**.

Allow **Share Link** to only be opened from specific geographic locations.

b.4 Set a **Password** that the recipient will need to provide to access the shared file.

b.5 Disable/Enable **Identify User** function

If this feature is enabled, when the recipient clicks on the **Share Link** to view the shared file, the recipient is required to provide his/her email address.

This feature is available only when **Destination Portal** is set to **Public Link**.





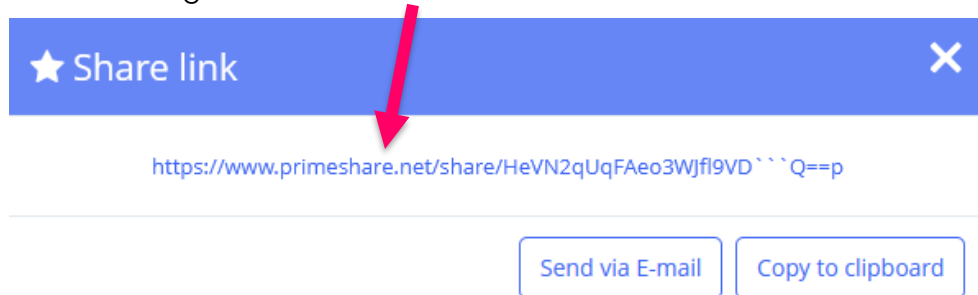
b.6 Set **Permissions**.

Enable/Disable the following functions:

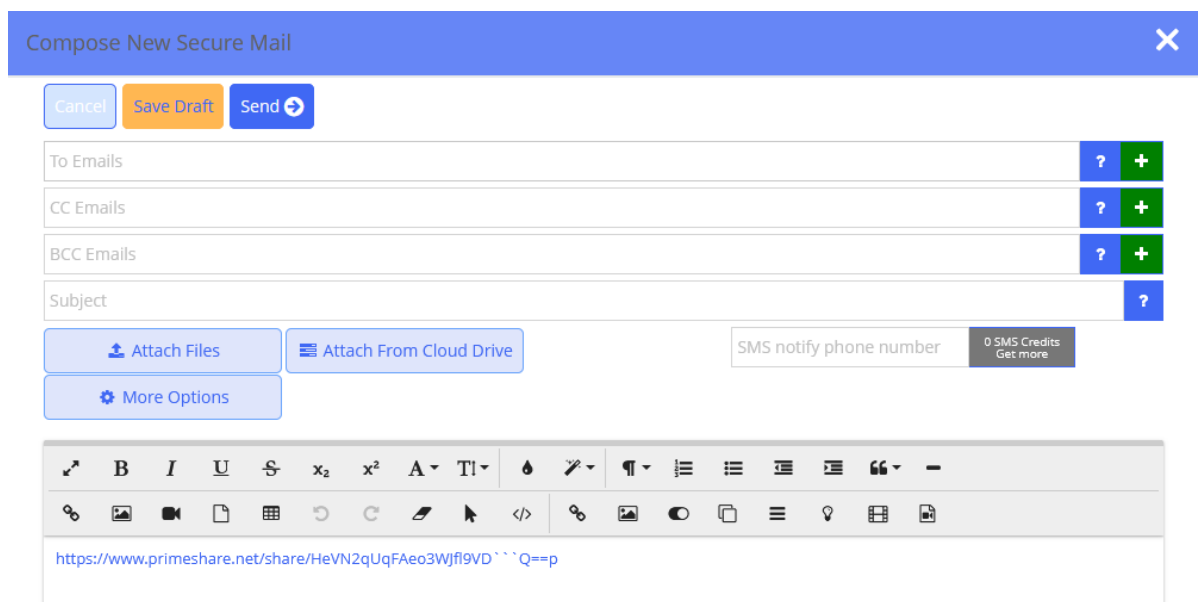
- Allow Comments 
- Allow Downloads 
- Allow Editing 
- Allow Copying 
- Allow Moving 
- Allow Forwarding 
- Allow Deleting 

c) Click **"Submit"**.

d) Primeshare generates **Share Link**.



d.1 **Send via E-mail** directs you to a popup box where you can compose an email.

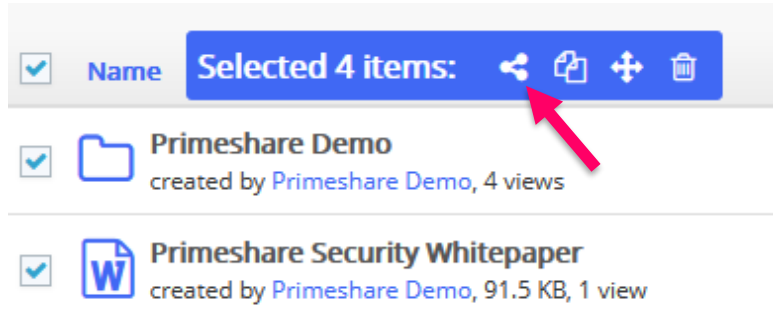


d.2 **Copy to Clipboard** copies the link of the **Share Link** so that you can paste it into a text message or another email interface should that be your preference.

## 6. Share Multiple Files/Folders

a) Select and click on the checkbox of the Files and Folders you want to share.

b) Click “Share Selected Items”  icon.



c) Define **Access Policy** on the items to be shared.

c.1 Select **Share Method**

- **Secure Email** – Provide the recipient’s email address and a secure email that contains the **Share Link** will be sent to the recipient.
- **Text Message** – Provide the recipient’s Cell Phone Number and a text message that contains the **Share Link** will be sent to recipient.
- **Get Public Link** – A **Share Link** will be generated, copy the link and send it to the recipient using any channel (e.g. Skype)

c.2 Set **Permissions**.

Enable/Disable the following functions:

- |             |                   |
|-------------|-------------------|
| • Comments  | • Move            |
| • Downloads | • Forward Sharing |
| • Edit      | • Delete          |
| • Copy      |                   |

### Permissions

Comment ☒ Download ☒ Edit ☒ Copy ☒ Move ☐ Forward sharing ☐ Delete ☐



### Optional Policies:

- c.3 Set a **Password** that the recipient will need to provide to access the shared items.
- c.4 To Allow **Shared Items** to be accessible ONLY by specific IP Addresses.
- c.5 To Allow **Shared Items** to be accessible ONLY during a set period of time.

**Password (Optional)**

**Allow access ONLY to one of the following IP Addresses (Optional)**

**Allow access ONLY during the following period (Optional):**

- c.6 Set **Link Expiry Days**.  
**Share Link** will expire after the set number of days from sharing date.

- c.7 Provide a **Message**.

- c.8 Set **Restrict Portal Access**.

If check box is checked, ONLY the users in the selected portal can access and view the shared items. The portal users are still required to login.

**Message**

**Restrict Portal Access**



☒ psdemo11

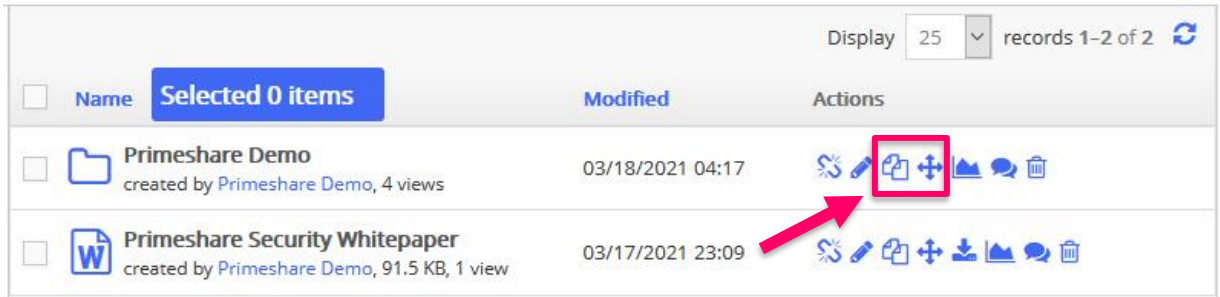
In the image above, the client portal **psdemo11** was checked. Hence, all the users added on **psdemo11** portal will have access to the shared items. These users will be required to enter their portal login information to view and access the shared items. Learn how to setup your client portal in [Secure Client Portal](#) section of this guide.

- d) Click **"Share Item"**.

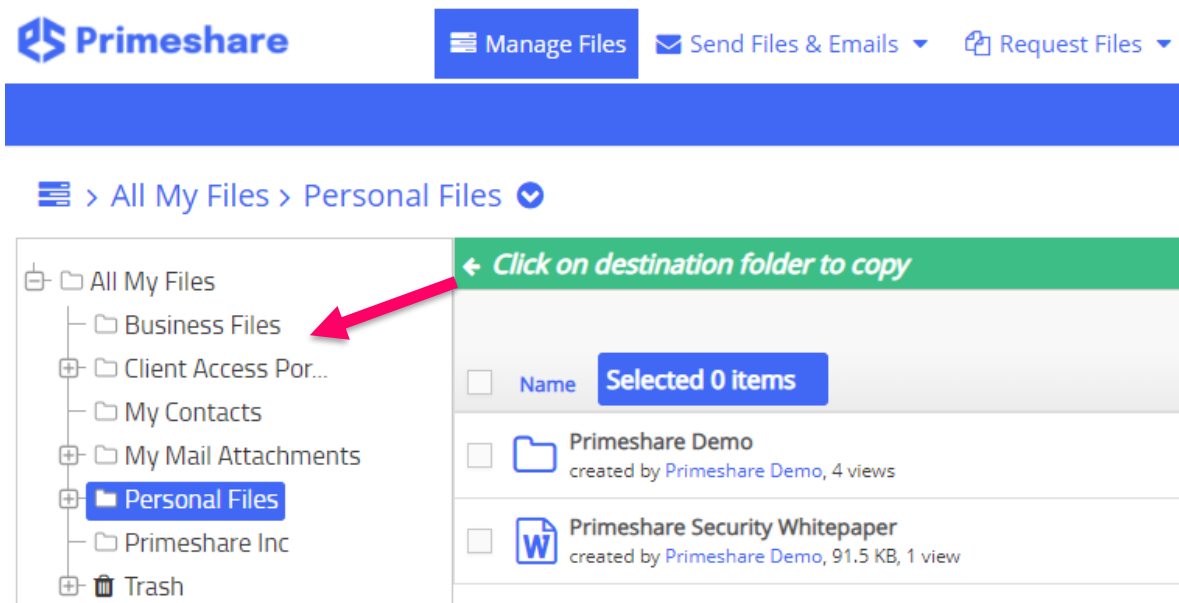


## Copy/Move Files or Folders to Another Folder

1. Go to [www.primeshare.net](http://www.primeshare.net) and login with your Primeshare account.
2. From the menu options where your user ID is displayed, Select **"Admin Apps"**.
3. Click **"Manage Files"**.
4. On your **Secure Drive**, select the file(s) or folder(s) you want to **copy** or **move**.
5. **Copy or Move a Single File/Folder**
  - a) On the item you want to **Copy** or **Move**,  
Click **"Copy Item"**  to copy or **"Move Item"**  to move the file or folder.





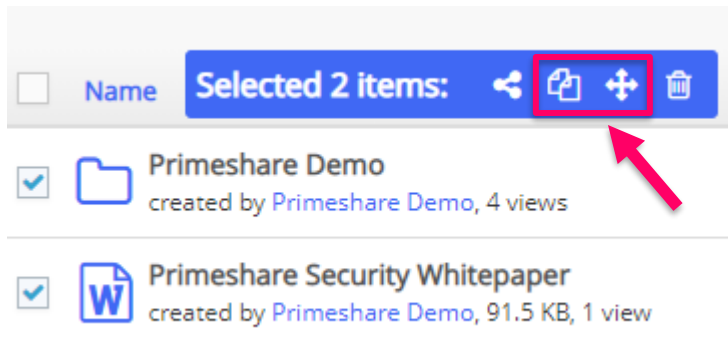
- b) Select and Click the **Destination Folder**.



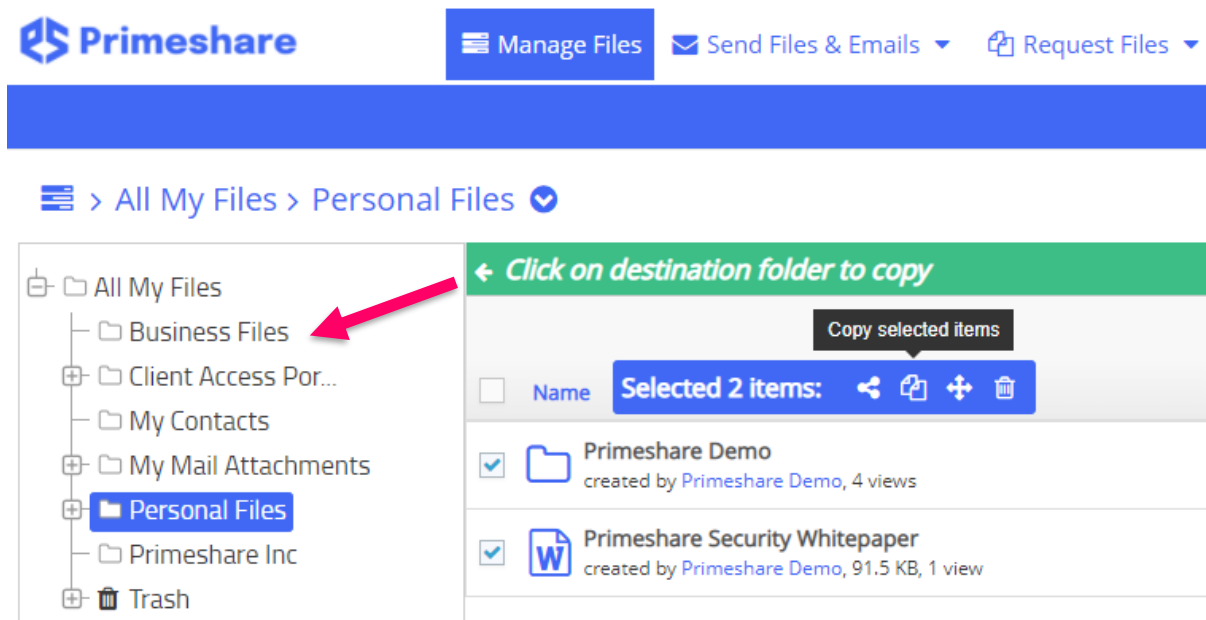
- For **Copy**: The Destination Folder is the new location where you want to store the copy version of the file or folder.
- For **Move**: The Destination Folder is the new location where you want to move the file or folder.

## 6. Copy or Move Multiple Files/Folders

- a) Select multiple items you want to **Copy** or **Move**,  
Click **"Copy Selected Items"**  to copy or **"Move Selected Items"**  to move the selected files and folders.

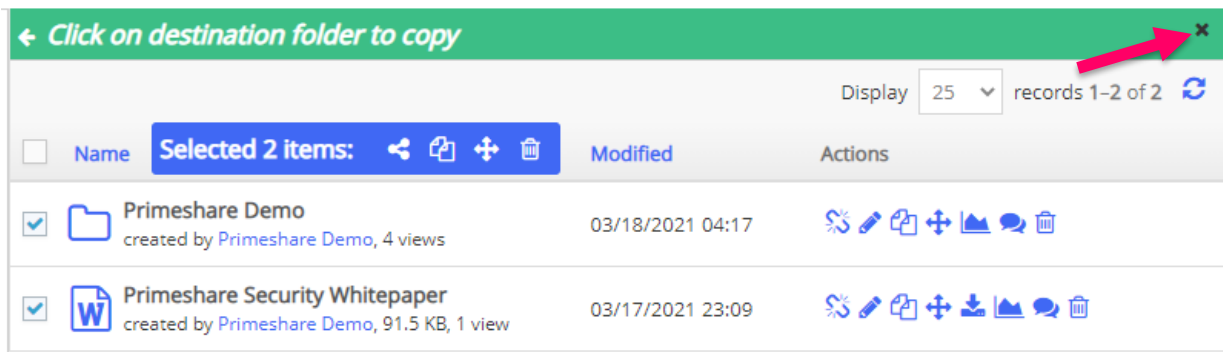


- b) Select and Click the **Destination Folder**.



- For **Copy**: The Destination Folder is the new location where you want to store the copy version of the selected files and folders.
- For **Move**: The Destination Folder is the new location where you want to move the selected files and folders.

7. Lastly, you have an option to cancel **Copy** or **Move** operation by clicking on **"X"** icon.



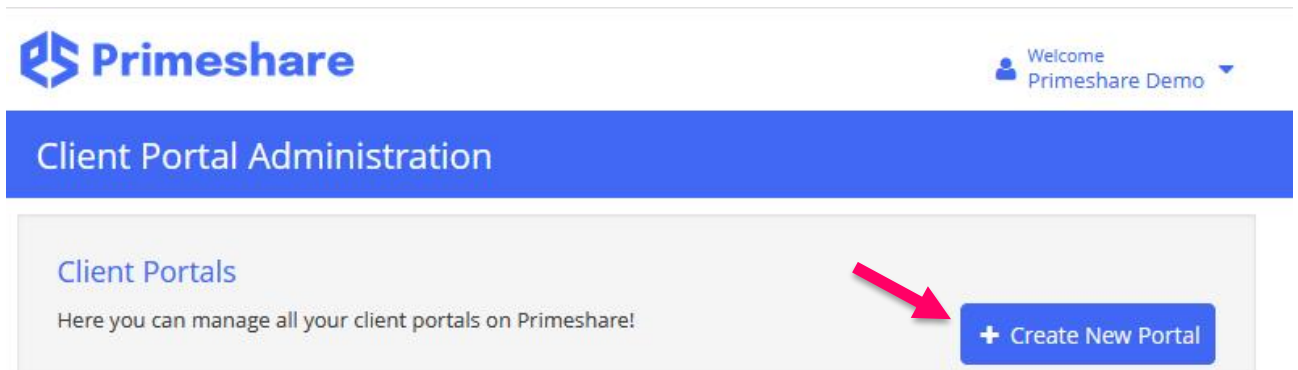
# Manage Your Secure Client Portal

Primeshare's Secure Client Portal provides a secure interface for sharing or receiving business documents. The portal you create will include a public-facing URL for all visitors (Portal Website) and a Secure Area for authenticated users.

Authenticated users will only see their assigned folders and their ability to delete, move, copy, or upload files and folders is determined by the permissions you define for each user. You create accounts for users by inviting them to join the portal or by allowing them to sign up on their own.

## Create Your Client Portal

1. Go to [www.primeshare.net](http://www.primeshare.net) and login with your Primeshare account.
2. You will be directed to the [Client Portal Administration](#) page.  
Click "[Create New Portal](#)".

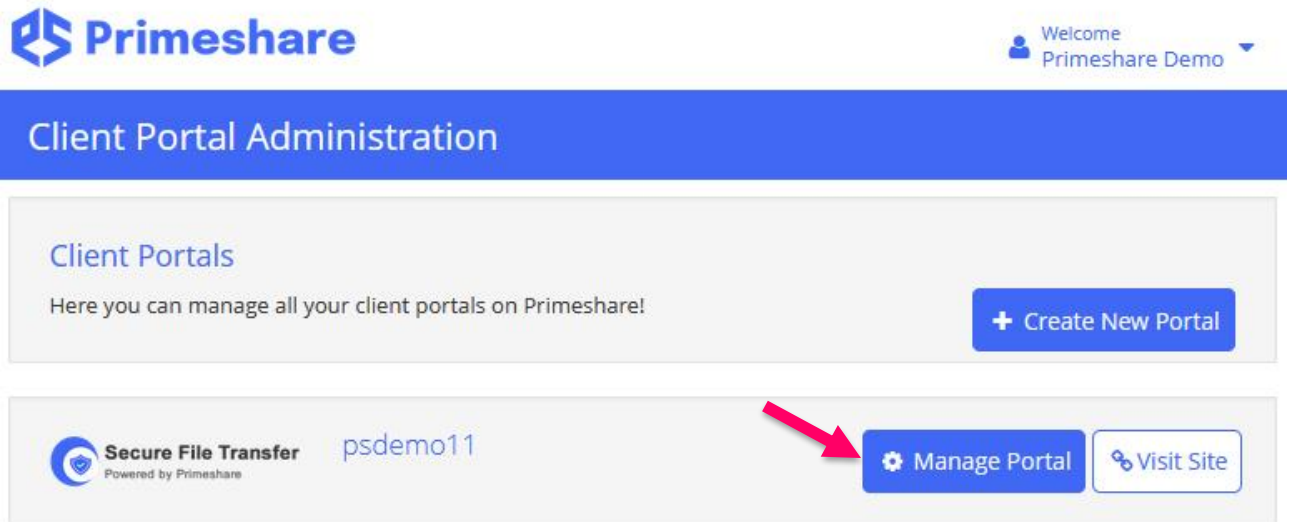


3. Enter a name for your portal with the following considerations in mind:  
(Your portal name will be appended to the end of the Primeshare domain as <https://www.primeshare.net/<yourPortalName>>.)
  - Your portal name must be unique within Primeshare.  
(If someone has already used your portal name you will see an error that the name is not unique. If this occurs, choose another name.)
  - Your portal name cannot contain any special characters.
  - Your portal URL cannot be modified after creating it without deleting the portal.
  - Your portal URL should include your company name or company acronym

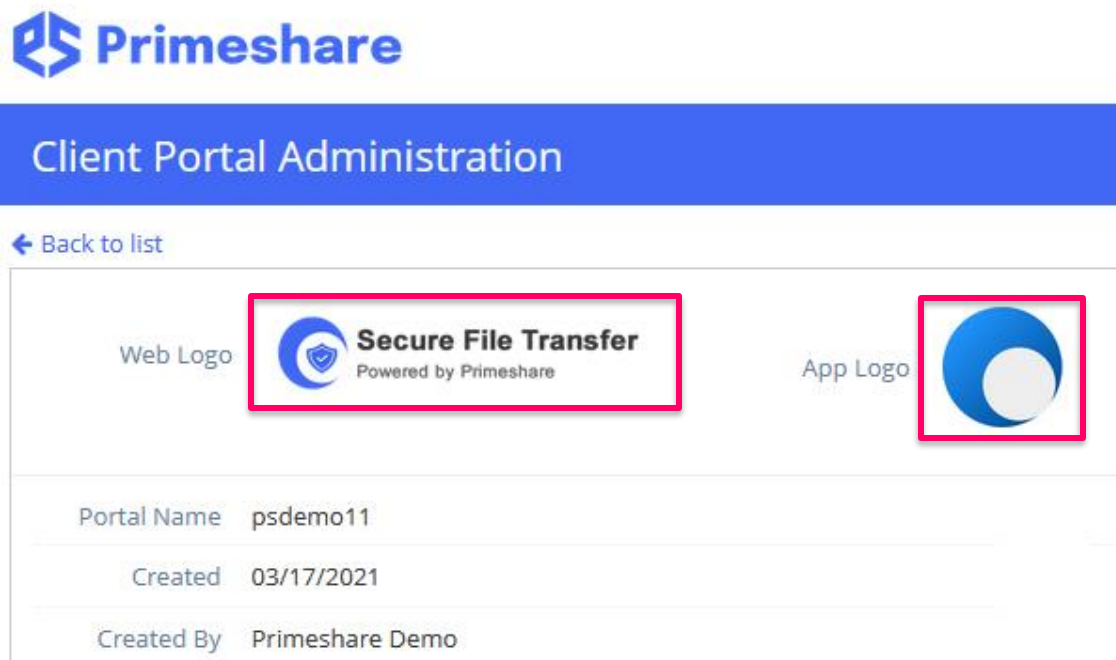


## Customize Client Portal and Add Your Own Logo

1. In the [Client Portal Administration](#) page, click **"Manage Portal"**.



2. Locate [Default Logo](#) (Web Logo and App Logo) to change the portal logo into your company logo.
  - Web Logo is for the Primeshare web interface
  - App Logo is for the Primeshare Mobile Application (Android and iOS)



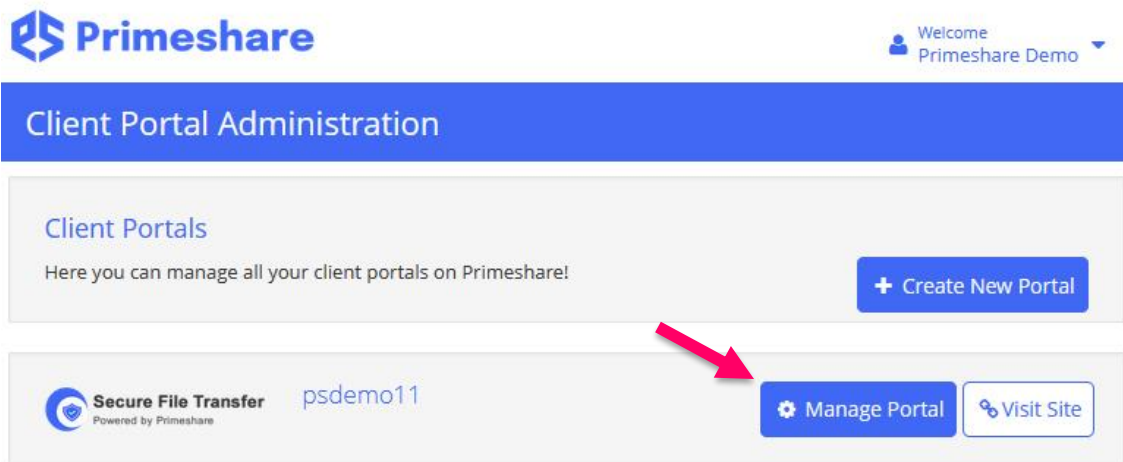
3. **"Click to Change"**, browse your device's file manager and select your company logo image file.



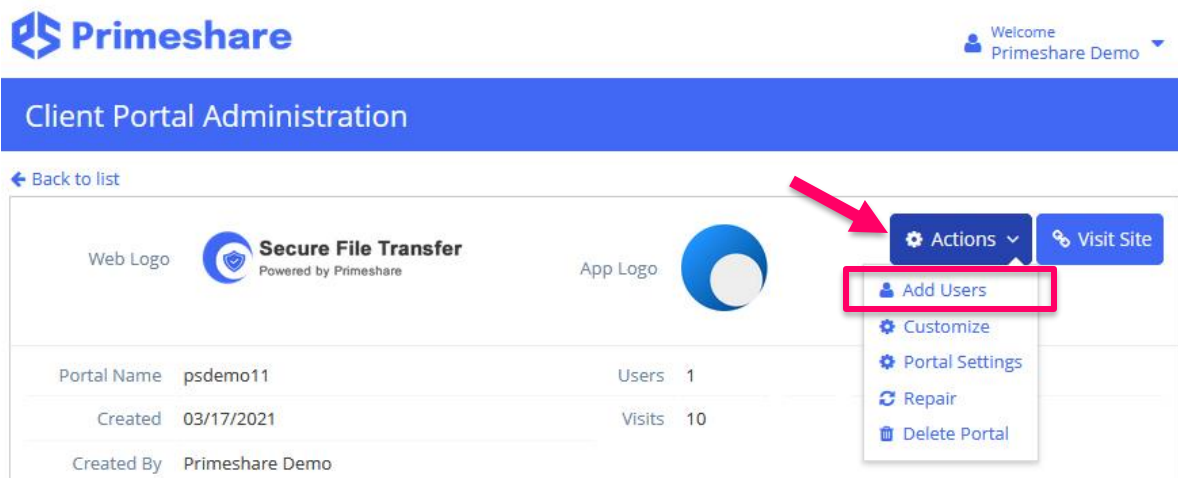


## Add/Invite Users to Your Client Portal


1. In the [Client Portal Administration](#) page, click **"Manage Portal"**.



2. Go to **"Actions → Add Users"**.



3. Fill in user information: **Last Name, First Name**  
Add user's **Email** and set user's **Password** to access the portal.

 Add Users to "psdemo11"

[+] New Users

First Name	Last Name	Email	Password
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="psdemopass"/>



To add multiple users at once, click on “[+] New Users” and add many rows as required.

**Add Users to "psdemo11"**

[+] New Users

First Name	Last Name	Email	Password
John	Doe	johndoe@email.com	demopass1
Jane	Doe	janedoe@email.com	demopass2
John	Smith	johnsmith@email.com	demopass3
Jane	Smith	janesmith@email.com	demopass4


4. Select which folder(s) to assign to the user.  
The **Assigned Folder(s)** are the folders in your portal that the user has access to.

Click **+Add More** to select folders, on your Secure Drive, to be assigned to client portal users.

**Assigned Folder(s)**

[+ Add More](#)  
[../Users/email](#)

By default, the user's assigned folder is located at  
**All My Files/Client Access Portals/<yourPortalName>/My Client Portal Users/email**

 **Primeshare**

Manage Files

Send Files & Emails ▾

Request Files ▾

> All My Files > Client Access Portals > psdemo11 > My Client Portal Users

✓

All My Files

- └─ Business Files
- └─ Client Access Por...
- └─ My Shared Items
- └─ **psdemo11**
- └─ My Contacts
- └─ My Mail Attachments
- └─ Personal Files

☐

**Name**


**Selected 0 items**

☐

**primesharedemo@gmail.com**  
created by Primeshare Demo

☐

**admin@primeshare.net**  
created by Macy Pellerin

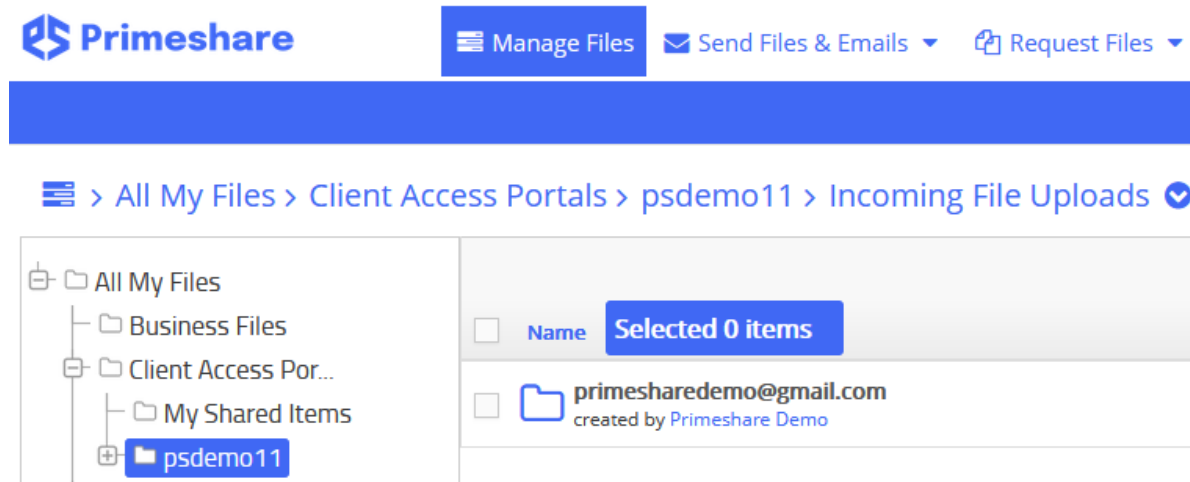


**Primeshare, Inc**  
 Silicon Valley Center, 2570 North 1st Street Suite 204, San Jose, CA 95131, USA  
[www.primeshare.net](http://www.primeshare.net)

5. Assign user's **File Request Folder**.

The **File Request Folder** is the folder in your portal where the user's requested files are uploaded.

By default, the file request folder for a user that you add is located at **All My Files/Client Access Portals/<yourPortalName>/Incoming File Uploads/email**



6. Set User's **Role**.

Users can be categorized as:

- **User:** This type of user can be firm employees who can [view](#) and [download](#) files shared with them.
- **Contributor:** This type of user can be firm employees or representative from different firms with extra privileges.  
This means that more features are available to them. Some of the features are [delete](#), [move](#), [forward](#), [edit](#), [rename](#), [view sensitive data](#), and have access to features like [mobile app POST support](#).
- **Client:** This type of user can be firm clients who has limited access to features. They can only [view](#) files shared with them.

Assigning of roles lets you organize between users that are your own employees (Ex: lawyers in a firm for example), or collaborators (ex: representatives from different companies working on a project).

7. Click **"Submit"**.



The [newly added or invited users](#) in the client portal will get an email containing the client portal URL and the user's login information.

Your account has been added in portal psdemo11 Inbox x



**Primeshare Demo** <secure@primeshare.net>

to me ▾

Thu

### New secure email message from psdemo11

Do not reply to this notification message. This message was automatically generated by the sender's security system

**Primeshare Demo** ([demopshare@gmail.com](mailto:demopshare@gmail.com)) sent you a secure email.

**Date:** 3/17/2021 6:32 PM

**Subject:** Your account has been added in portal psdemo11

[View message and reply](#)

The content of this email is confidential and intended for the recipient specified in the message only. It is strictly forbidden to share any part of this message with any third party without written consent of the sender. If you received this message by mistake, please reply to this message and follow with its deletion process, so that we can ensure that such mistakes do not occur in future.



Powered by [Primeshare](#) | [terms](#) and [privacy](#)



**Primeshare, Inc**

Silicon Valley Center, 2570 North 1st Street Suite 204, San Jose, CA 95131, USA

[www.primeshare.net](http://www.primeshare.net)