

How to open a Baum Smith shared folder

We send files through a secure folder on our Microsoft 365 system instead of email attachments. Large files arrive whole, and you always see the current version. The folder is shared with you personally, at one email address.

OPENING THE FOLDER

1. **Click the link in our email.** It comes from a person at an @baumsmith.com address. A computer is easiest, but a phone browser also works.
2. **Enter the email address our message was sent to.** It has to be that exact address. A different address, even your own, will not open the folder.
3. **Get the one-time code.** Microsoft emails a short code to that address. If it is not in your inbox within a minute or two, check junk or spam. If the code expires, ask for a new one on the same screen.
4. **Enter the code.** If your address is a work account that already uses Microsoft, you may be asked to sign in with your own work password instead of a code. That is normal.
5. **First time only:** a page asks you to review permissions for Baum Smith LLC. Choose **Accept**. It lets our system recognize you. It does not give us access to anything of yours.
6. **The folder opens.** Click a file to view it, or use **Download** to keep a copy.

IF WE ASK YOU TO SEND US FILES

Most folders are for reading only. When we want documents from you, we will say so and give you upload access, usually to a subfolder named **IN from** followed by your name or firm. Drag your files in, or use **Upload**, then send us a short email saying what you added. We are not notified automatically.

GOOD TO KNOW

- Our code page shows the Baum Smith logo on a red background. If you sign in with a work account, you will see your employer's own sign-in page instead. If a link came from an address that does not end in @baumsmith.com, do not click it. Call us.
- We never ask for your email password, and our staff will never ask you for the code.
- Do not forward the link. It will not work for anyone else. Send us their address and we will add them.
- The code step repeats from time to time. That is Microsoft confirming it is still you.
- Access ends when we remove it, usually when the matter closes. Download anything you want to keep.

Trouble opening a folder? Reply to our email or call (541) 963-3104, Monday through Friday. Tell us the address you used and what the screen said.