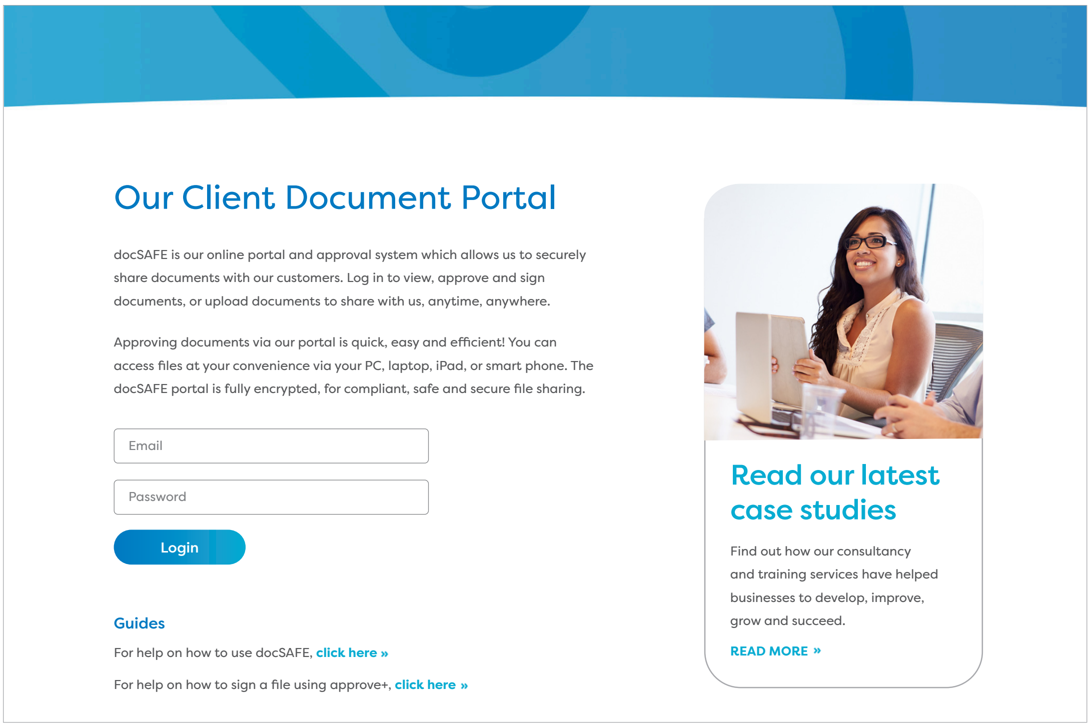
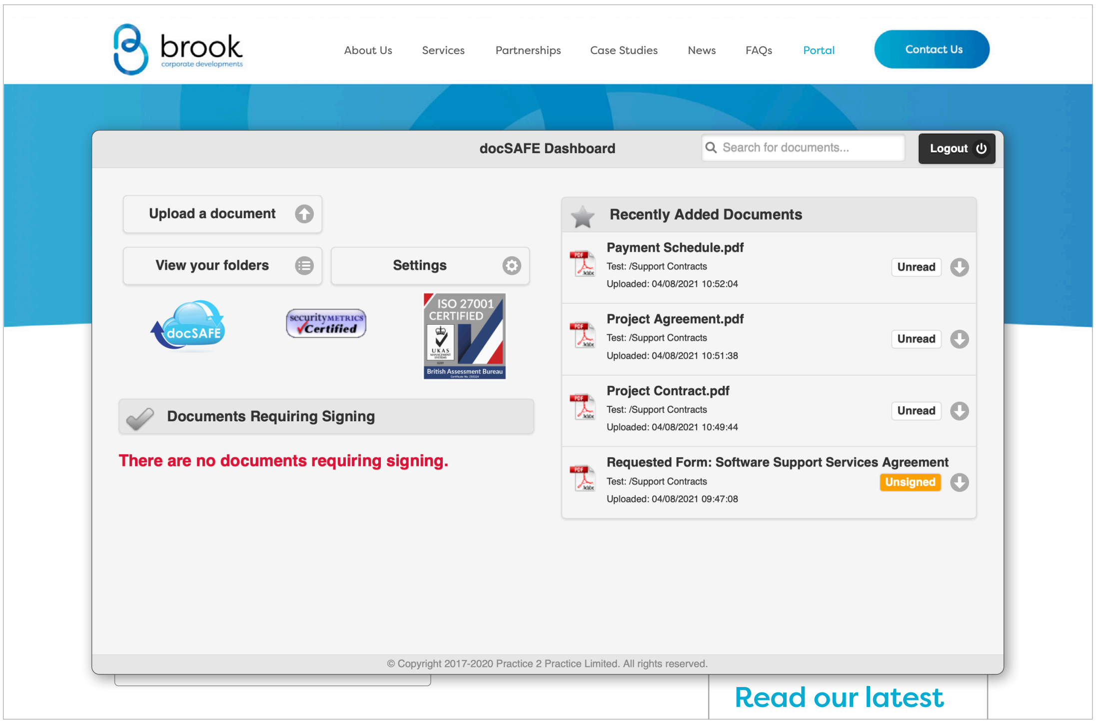
# docSAFE USER GUIDE

You can access our Client Portal through the **Portal** link on our website or via a link on the email notification you received.


Enter your details and click the **Log In** button to open the portal.



Once you logged in, you'll see the docSAFE dashboard.




Any new documents uploaded by YourDMS will be shown on the right. Any of these documents that require your approval will also appear on the left of the screen.

You can access a document by clicking on it and then either download, or preview the document and approve it, if required.

Our Client Portal also allows for documents to be digitally signed. If a digital signature is required, you'll be notified after opening the document. Follow the on-screen instructions to insert your digital signature.

## Uploading documents

You can upload a document by clicking on **Upload a document** option from the main screen.

You will be presented with the following options:

- **Document Upload** – here you can choose the file you wish to upload from your PC, tablet, etc
- **Destination Account** – here you can select the staff member you deal with, if more than one
- **Destination Folder** – choose the relevant folder to upload the document into
- **Upload Notification** – choose the staff member you want to notify about the uploaded document
- **Email Subject** – here you can add a title if required
- **Additional Message** – here you can add extra infromation
- **Overwrite Document(s)** – this is not set as compulsory and is your decision, when the document is saved in our system we will either save as or overwrite