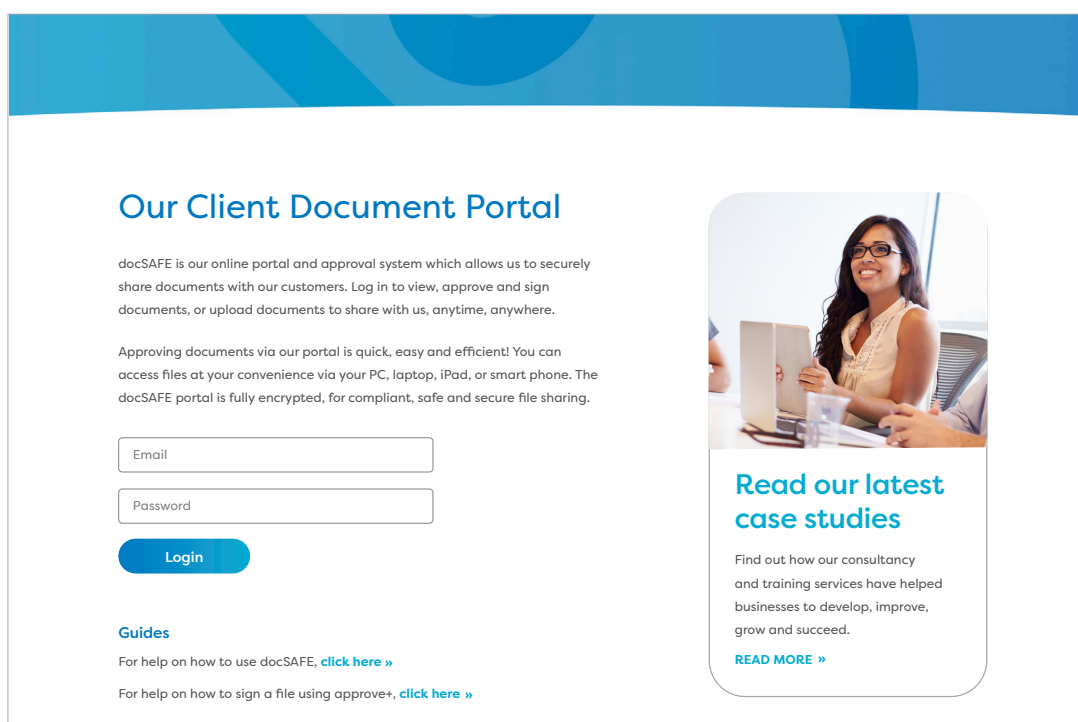


docSAFE USER GUIDE

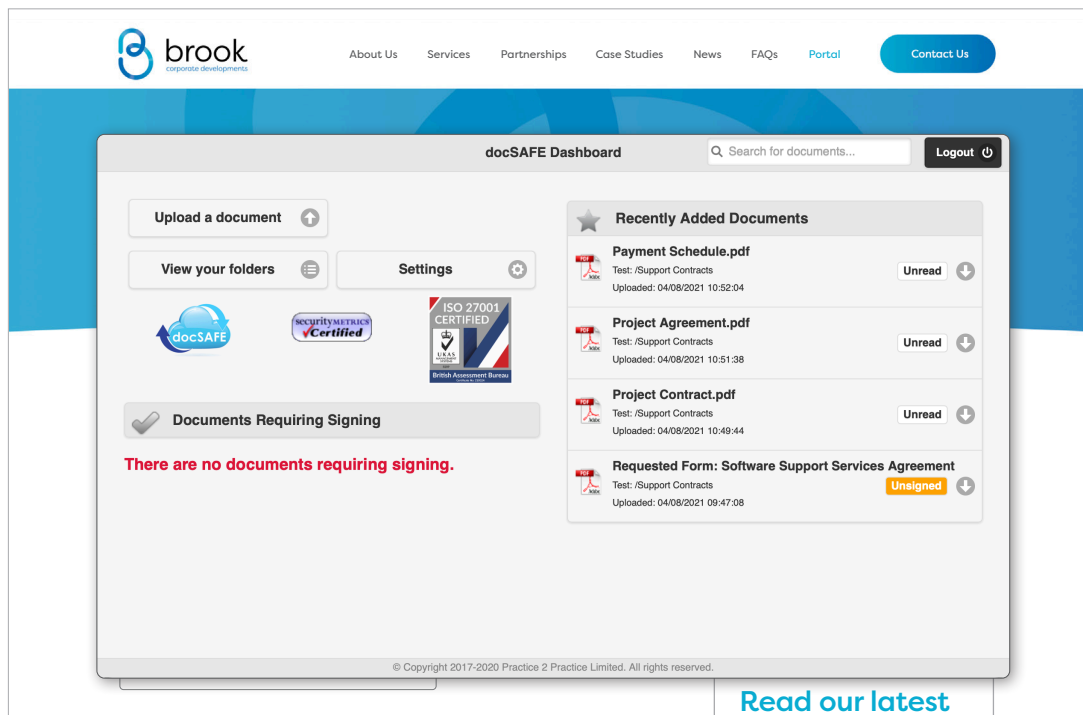
You can access our Client Portal through the **Portal** link on our website or via a link on the email notification you received.



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

The image shows the docSAFE Client Document Portal login page. It features a blue header with the text 'Our Client Document Portal'. Below the header, there is a paragraph explaining that docSAFE is an online portal and approval system for securely sharing documents. A second paragraph states that approving documents via the portal is quick, easy, and efficient, and that it is accessible via PC, laptop, iPad, or smart phone. The portal is fully encrypted for compliant, safe, and secure file sharing. The login section includes an 'Email' input field, a 'Password' input field, and a 'Login' button. Below the login fields, there is a 'Guides' section with two links: 'For help on how to use docSAFE, click here »' and 'For help on how to sign a file using approve+, click here »'. On the right side of the page, there is a section titled 'Read our latest case studies' with a photo of a woman working on a laptop and a 'READ MORE »' link.

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.

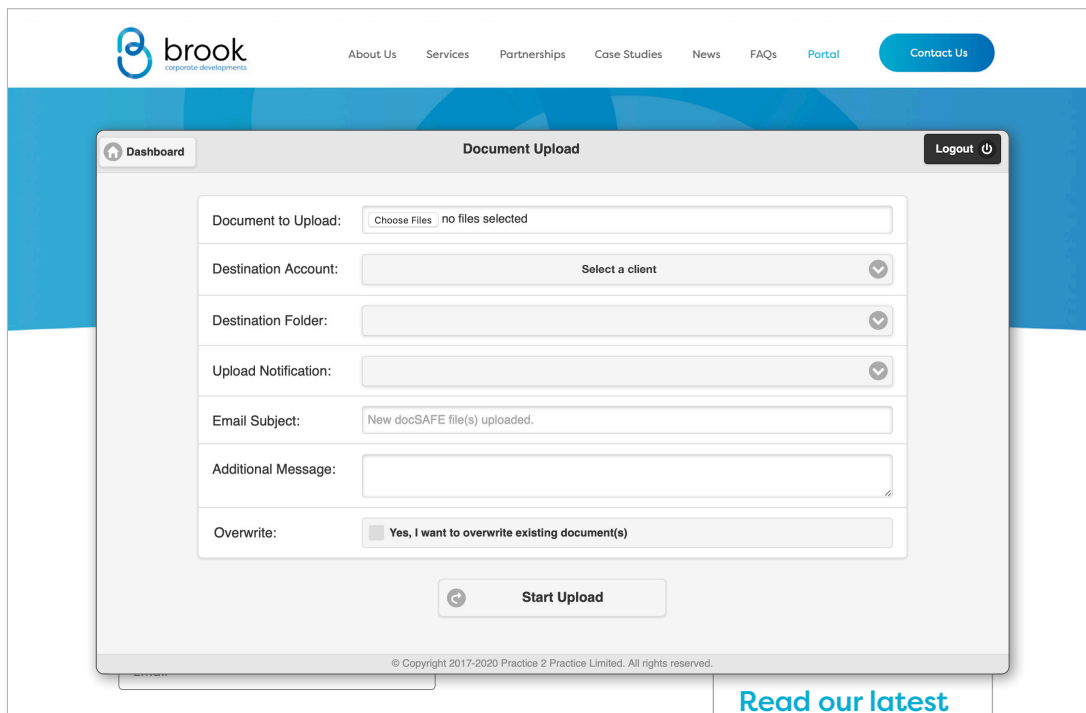
Our Client Portal also allows for documents to be digitally signed. If a digital signature is required, you'll be notified after opening the document. Follow the on-screen instructions to insert your digital signature.

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 information
- **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



The screenshot shows the 'Document Upload' interface within a web portal. At the top, there is a navigation bar with the 'brook corporate developments' logo and links for 'About Us', 'Services', 'Partnerships', 'Case Studies', 'News', 'FAQs', 'Portal', and a 'Contact Us' button. The main content area is titled 'Document Upload' and includes a 'Logout' button. The form contains several fields: 'Document to Upload' with a 'Choose Files' button and 'no files selected' text; 'Destination Account' with a dropdown menu showing 'Select a client'; 'Destination Folder' with a dropdown menu; 'Upload Notification' with a dropdown menu; 'Email Subject' with a text field containing 'New docSAFE file(s) uploaded.'; 'Additional Message' with a text area; and 'Overwrite' with a checkbox labeled 'Yes, I want to overwrite existing document(s)'. A 'Start Upload' button is at the bottom of the form. A copyright notice at the bottom of the form reads: '© Copyright 2017-2020 Practice 2 Practice Limited. All rights reserved.' A 'Read our latest' link is visible at the bottom right of the page.