

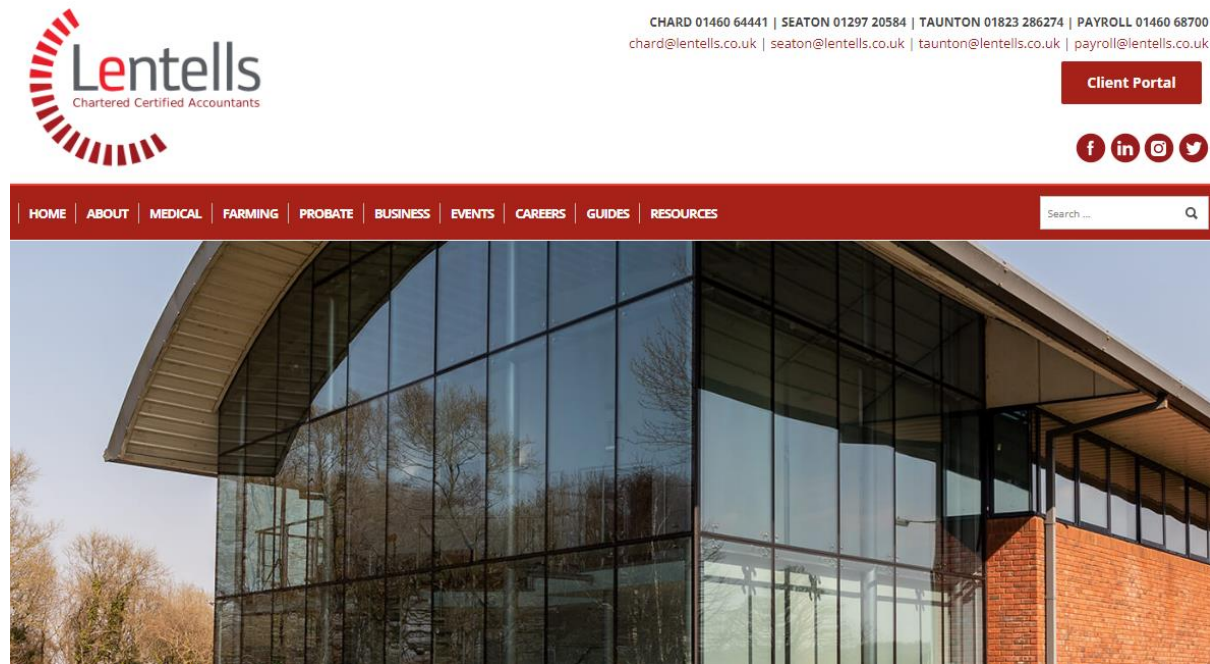


## DocSAFE USER GUIDE



## ACCESS

You can access our Client Portal through our website, the Lentells' app or via the link on the email notification you received.



You will then be promoted to enter your email address and password. On first access to DocSAFE you will be promoted to change the generic password to your own.

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### CLIENT PORTAL

Welcome to the secure Lentells Client Portal which is provided free of charge to all our clients.

docSAFE allows you to securely store and retrieve documents, approve Accounts, Tax Returns and other documents anytime, anywhere. You can work with us together on files so we can share information and you will be able to access records 24/7 at your convenience.



Email:

Password:

[forgot password](#) | [DocSAFE Mobile](#)

- Compliant, safe and secure file exchange
- More secure than e-mail and fully encrypted
- Electronic signatures
- Access via your pc, laptop, iPad, or smart phone

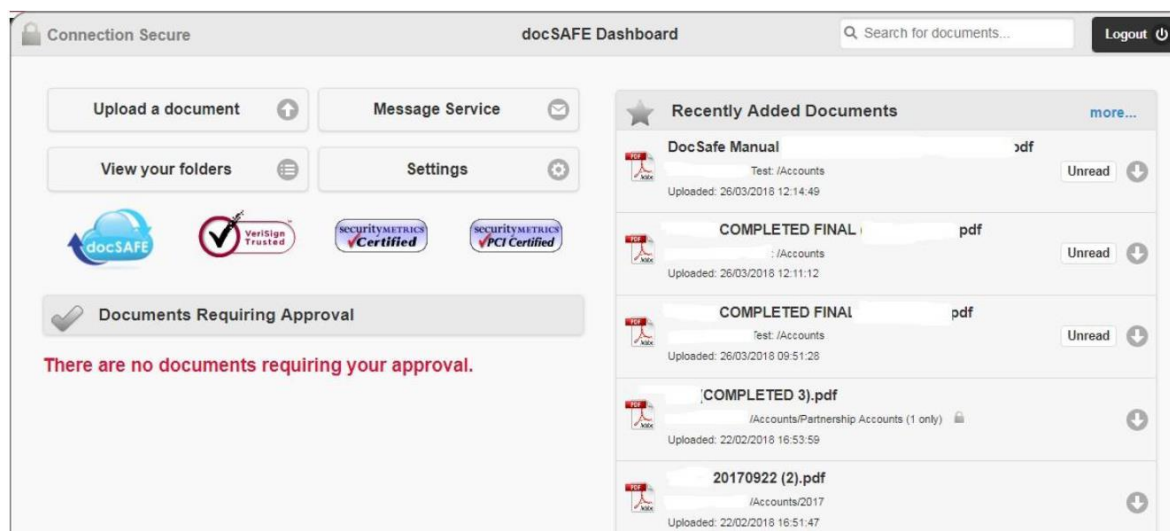
Please click on the link to read our [docSAFE users guide](#)

For help on how to sign a file using approve+ please click [here](#)

If you already have your login details please log in above, if you have forgotten them just click the forgot password link.

If you would like to discuss the service further please speak to your usual Lentells contact.

Once you log in, you will be presented with the following screen:



Any new documents uploaded by Lentells will be shown to the right and any of those documents that require your approval will additionally appear to the left of the screen.

You can access the document by clicking on it and from here you can either download or preview the document and approve it, if required.

Our client portal allows for documents to be digitally signed. You will be notified when the digital signature is required after opening the document. Please follow the on-screen instructions to insert your digital signature.

## UPLOADING DOCUMENTS

You can upload a document / backup by clicking on 'upload a document' option from the main screen.

You will be presented with the following options:

- Document upload
  - o Here you can chose the file / backup you wish to upload from your PC, tablet, etc.
- Destination account
  - o Here you can select the staff member you are assigned to (Lentells Director or Manager), if more than one
- Destination folder
  - o Chose the relevant folder to upload the document / backup into
- Email subject & additional message
  - o Here you can add a title if required
- Overwrite document(s)
  - o 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.

## Lentells Limited – DocSAFE User Guide

Dashboard Document Upload Logout

Document to Upload:  No file chosen

Destination Account:  ▼

Destination Folder:  ▼

Upload Notification:  ▼

Email Subject:

Additional Message:

Overwrite Document(s):  Yes, I want to overwrite existing document(s)