

Portal End User Guide

2018

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1 Overview

The Menu Bar Inbox: Select to view messages sent to your Portal account Sent: View messages sent by you to your provider My Profile: Your portal account settings Upload: Upload documents and send messages with attachments Refresh: Update live information Previous and Next: Select next and previous message Change Layout Options: Categories; Message list; Viewer

 ✓ Portal Message Inbox ← → C ■ DocuSoft 	× Control of timited [GB] https://www.docusoftcloud.net/MyDocuments.aspx?Code=0003&Email=andyablerecovery@gmail.com	0 - □ × 0 ☆ ::
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My Documents Quatations Sign Out	Action taken during approval:	tachment

Portal Browser



2 Your Profile



When you log in to the Portal (for the first time only) you will be taken to the My Profile application, otherwise you can use this application to change/reset password, and to create preferences and signatures.

In the menu bar (see image below), select 'My Profile' and you will be presented with a number of tab options to set and change your Docusoft Portal profile.

Hello		Docusoft
Andy (Sign Out)		Help Terms and Conditions
inbox 🍶 Sent Items 🌉 My Pro	File 🌛 Upload	11/10/2017 13:46
You can change the appearance or theme of your portal. Your current theme is shown below in the drop down first and a graphical representation is provided below that. My Theme selection is disabled whilst changes are being made to the profile. First Theme: Outlook Iaurence Lebha Image: Comparison of the theory of theory of the theory of the theory of the theory of the theory of theory of the theory of theory of the theory of the theory of theory of	Profile My Preferences My Message Signature My Certificate Signature ProFILE IAddress: andyablerecovery@gmail.com Name: Andy Name: Able orable Date: 10/05/2017 Hint: orable Word: yoo Hint: hange Password Current Password: Current Password: Confirm Password: NOTE The portal will time out your session after 20 minutes of inactivity. NOTE The portal will time out your session after 20 minutes of inactivity.	

Portal Browser

'*My Profile*' tab allows users to set memorable information that will be used as a hint if you need to reset your password. You can also change your password at any time.

'My Preferences' tab allows you to set the default for how you view messages when you login, i.e. you can set the default to just view the 'For Approval' messages.

'My Message Signature' tab allows you to set up the signature for any message you send.

'*My Certificate Signature*' allows you to upload or draw a signature that will be used for "Electronic Signature" of documents and in the Certificate used for approval.



3 How to Read Messages

In the menu bar, select 'Inbox', select a message in the 'Message List', then in the 'Viewer' window select the message tab to read the message. Attachments are listed at the bottom of the 'Viewer' window.

Any attached document(s) can be viewed by selecting the desired attachment. The selected document will be made visible in the 'Document Viewer' tab. From the 'Document Viewer' a document can be printed or saved using the standard viewer functions supplied by the browser.

4 How to Approve Messages and Sign Attachments

Messages can be sent 'For Approval' or 'For Information'. Messages with attached documents that require approval can be either sent to you for your 'approval' only or can be sent for 'signature' and 'approval'.

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Hello Andy (Sign Out)	-						Help Terms and Conditions
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All Docs (9)	Date/Time	Subject	Section	For Approval	Viewec	Message Document Viewer F	lipbook Viewer Approval Required
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For Information (1)	09/10/2017 15:29	For s	oval options	es	09/10/.	Uncheck any attachments which you do no	ot wish to approve at this time.
Not Approved (0)	4 🙆 09/10/2017 15:12	64-8 SIGN		es	09/10/.	☑ TaxForm.pdf	
Priority (1) Actions Outstanding (0)	Ø Ø	Please both sign doc	06. Tax	Yes	09/10/.		
By Folder P 01. General Correspondence	Catego	ignatures Dries	06. Tax	Yes	09/10/.		This is the signature that will be inserted in the certificate and any documents that require
6. Tax	🖡 🖂 09/10/2017 12:56	ture for multiple contacts	06. Tax	No	09/10/.	I approve the message and its associated attachments.	 signing when you approve or disapprove this message.
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	4 🖂 28/09/2017 13:10	For signing	Comments		28/09/	Kind regards,	1/ARIF
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Messages that have attachments that require your approval are identified easily.





When more than one document is attached, you can also choose to save and download files.

In the 'Viewer' window, click on the tab marked 'Approval Required', above the message. You are presented with a number of check box options: 'Approve', 'Disapprove', 'Comment', 'Sign' (if signature is required) and Send.

You can view all messages requiring approval by clicking on the 'For Approval' category.

In the 'Viewer' window, the 'For Approval' tab will flash when a message requires approval.

From the 'Viewer' window you can view the message, the attached document(s) and the level of approval required.

	Help	
		12/10/2017 10:23
Message Save Attachments	Document Viewer	Flipbook Viewer Approval Required
Select All Deselect All		Save Selected Attachments
This facility is for saving multi	ole documents. Single doc attachment shown in the p	ocuments can be saved by right clicking the panel above.
NOTE: When saving multiple f download is complete, to extract :	iles a zip file will be down the documents right click instructions.	nloaded to your specified folder. When the k the zip file, select 'Extract All' and follow the
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		Þ

To 'Approve' a message simply click on the 'Send' button. Only the 'Send' button is displayed when no signature is required.

To 'Sign' a message, click on the 'Sign' button. Your Portal provider will determine where your signature is placed in the document and how many times it may be required. Once you have signed a document, and you are happy (you can review the document before it is 'Sent'), you can click on the 'Send' button and the document is signed and approved. You can review your signed document after it has been sent by accessing the message from the 'Approved' list and clicking on the 'Document Viewer' tab. And you can download a copy of your signed document at any time.

When sending a document/message, a number of activities will be initiated automatically including:



- A standard comment ("I approve the message and its associated attachments") will be added to the comment (which can be edited before sending);
- Your electronic signature is embedded in the PDF and is certified (signing only).
- An email notification with the certificate attached will be sent to you;
- An email notification with the certificate attached will be sent to the Portal provider;
- The message will be marked as 'approved' and will no longer appear in the list of messages 'For Approval'.

5 How to Disapprove Attachments

When you have viewed a message and its attachment(s) and decided it should be rejected, then use the Disapprove selection option provided.

To 'Disapprove' a message check the 'Disapprove' box and click on the 'Send' button.

		Help Terms and	Conditions
			10/10/2017 09:3
Message	Document Viewer	Flipbook Viewer	Approval Required
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A number of activities will be initiated automatically including:

- A standard comment ("I disapprove the message and its associated attachments") will be added to the comment;

A certificate will be generated;

- An email notification with the certificate attached will be sent to you;

- An email notification with the certificate attached will be sent to the Portal Provider;

- The message will be marked as 'Disapproved' and will no longer appear in the list of messages 'For Approval'.

It is also possible to partially approve a message that has multiple attachments.

To 'Partial Approval' a message (applies to messages with multiple attachments only), check the 'Disapprove' box, check the box(es) for the attachments that you approve and leave the attachments that are not approved unchecked and click on the 'Send' button.

After Approval, a number of activities will be initiated automatically including:

- A standard comment (i.e. "I approve the message and 2 of its 3 associated attachments.") will be added to the comment;
- A certificate will be generated;



- An email notification with the certificate attached will be sent to you;
- An email notification with the certificate attached will be sent to the Portal Provider;
- The message will be marked as 'Approved' and will no longer appear in the list of messages 'For Approval'.

6 How to Comment on Messages and Attachments

You can add and send comments about messages and attachments easily by using the 'Comment' function provided. You can amend standard comments for approve and disapprove at any time in the 'Comment' window. You can send comments about a related message or attachment without either, approving or disapproving.

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Comment on Attachments



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On 12/10/2 I am not sure	017 at 11:49 A	Andy Able made the follow required details. Please can you	r ing comment: I check this form for me.
Hello and th	anks		
Andy Able	BLE		

When you wish to make a comment only, check the 'Comment' box, and type your comments in the message window and then click on the 'Send' button.

The intended recipient at the Portal provider will receive an email notification confirming a comment has been added to the message.

If the recipient from the Portal provider makes a further comment in response, then you will also receive an email notification confirming a comment has been added to the message and the new (and all previous) comments will be available in the 'Comments' tab.

7 How to View and Print

Attachments

Attachments are located at the bottom of the 'Viewer' window (right-hand panel), highlighted as 'Attachments'.

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Viewing Attachments

Attachments are clearly labelled. You can view any attachment by clicking on it. The attachment will be displayed in the 'Document Viewer' tab.



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Print Attachments

From the viewer, attachments can be printed and/or downloaded. The web browser application you are using will determine how you can review, download or print documents. Where there are multiple documents, an additional download feature is provided to improve download speed by saving attachments at the same time.



Print Attachments using your Web Browser

8 How to Use the Flipbook Viewer

When there are a number of documents that need to be viewed, the Flipbook Viewer is provided as an alternative viewer. One or more PDFs can be merged and presented as an on-line book to flip through.



To create a Flipbook View:

- Choose the 'Flipbook Viewer' tab in the 'Viewer' window;
- Click the 'Prepare the Flipbook' button;

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Preparing Flipbook Viewer

Once the Flipbook has been created choose the 'Launch Flipbook View' option.

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Launching Flipbook Viewer

After clicking on the launch button, your selected (or merged) PDF document will be displayed in a Flipbook (Read only) viewer.



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24 Management expenses under 575 ICTA 1988 23 c		107 - 108 Machinery and plant - main pool	
30 Trading losses of this or a later accounting period under 5393A ICTA 1988		109-110 Cars	
31 Put an X-lo bas 31 P amounts carried back from kiter accounting periods are included in box 30		111-112 Industrial buildings and structures	100
32 Non-trade capital allowances		113 - 114 Other charges and allowances	and the second second
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37 Profits chargeable to corporation tax	37 C	Capital allowante.	
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39 Number of associated companies in this period 39		And the second s	
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42 Put an IX' in box 42 if the company claims to be charged at the starting rate or the small comparies' rate on any part of its prafits, or is claiming marginal rate relief	2	174 Designated environmentally hierady machinery and plant	
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(22111	GO TO PAGE GC	Docusoft

The Flipbook Viewer

Pages can be scrolled through using the page controls on either side of the attachment and pages can be turned by clicking on the corner of a page and then dragging it.

9 How to Upload Files

To upload files to your Portal provider, select 'Upload' from the main Portal menu.



Upload Documents and Send Messages



The use of this screen has been designed to feel like you are creating an email. The right-hand column provides easy step-by-step instructions, and each step must be completed. As each step is completed, 🔞 red crosses turn to 👩 green ticks.

To u	pload documents:
0	Select 'Section' on the left panel
0	Select 'From', your company name
0	Select who to send message 'To'
0	Provide a 'Subject'
0	Select 'Attachment(s)'
G	Enter your 'Message'

- **Section:** Select the *'Section'* category in the left-hand pane that your uploaded message and documents relate to.
- From:The 'From' label will be pre-populated if the user only has 1 company
(otherwise a pulldown list will be presented to allow the user to select his
company of choice). This will provide additional information to the Portal
provider to know which company the files relate to in addition the 'To'
label will be pre-populated, based on the value in the 'From' field.
- **To:** Pre-populated from the 'From' field.

Subject: Add the subject title of the message being sent.

- Attachments: Click on the 'Select File' button in the right-hand column. You will be presented with a browser window in which you can navigate and select the required files. Multiple files can be selected for upload.
- Message: Add your message in the 'Message' window. If you have included a signature in your 'Profile' this will be included in the message automatically, but can be over-written if required.

Once, and only when, there is a set of 📀 green ticks in the right-hand column, can the message be sent, by clicking on the 'Send' button.



Hello		Docusoft
Andy (Sign Out)	My Profile 🕹 Upload	Heip Terms and Conditions 12/10/2017 14:52
Section Se	From: Able Recovery Ltd To: Robin Nathan cc: Image: Colore Subject Year end accounts and supporting documents for Able Recovery Image: Verdana 11 px Image: Nov, please find documents requested to allow you to prepare final accounts. Kind regards, Andy Able Additional accounts Additional accounts	 To upload documents: Select 'Section' on the left panel Select Trom', your company name Select tho to send message 'To' Provide a 'Subject' Select 'Attachment(s)' Enter your 'Message' Attachments: Example JC Balance Sheetxis x Remove Final Acts Docpdf x Remove Select File
document.zip ^		Show all X

When the message is sent, the Message Screen will be cleared and you will receive confirmation that your message has been sent.

Send	From: To: cc: Subject:			
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Andy Able	SLE			ļ

10 Viewing Sent Messages

Select the 'Sent Items' in the main menu.

Messages in bold are denoted as unread. A message will stay as 'Unread' until the recipient has opened the message, and then additionally a 'Viewed Date' will be displayed. Please note this feature may be disabled by the Portal provider. In this instance, the message will be shown as being read immediately.



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inbox 🍠 Sent Items 📮	My Profile	参 Upload	🧑 Refresh 🛛 🖛 Pre	evious Next 📫		12/10/2017 14:5	
All Docs (6)		Date/Time	Subject	Viewed Date	Company	Message Comments Document Viewer	
- 🗁 01. General Correspondence - 🗁 03. Bank Statements - 🗁 06. Tax	1 🖂	↓ ☑ 12/10/2017 14:53 Recovery			Able Recovery Ltd Hi Rob, As per your email 1st Nov, please find documents requested to allow final accounts.		
Other Services	4 🖂	09/10/2017 17:23	Duplicate form please		Able Recovery Ltd	Kind regards,	
	۵	03/10/2017 11:33	Docs uploaded via other services	09/10/2017	Able Recovery Ltd	1 40 -	
	4 🖂	21/08/2017 10:42	Document uploaded for you	21/08/2017	Able Recovery Ltd	MASLE	
	4 🖂	10/08/2017 11:24	Image proof	10/08/2017	Able Recovery Ltd	Able Recovery	
	4 🖂	18/07/2017 12:23	Subjext	10/08/2017	Able Recovery Ltd		
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End



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