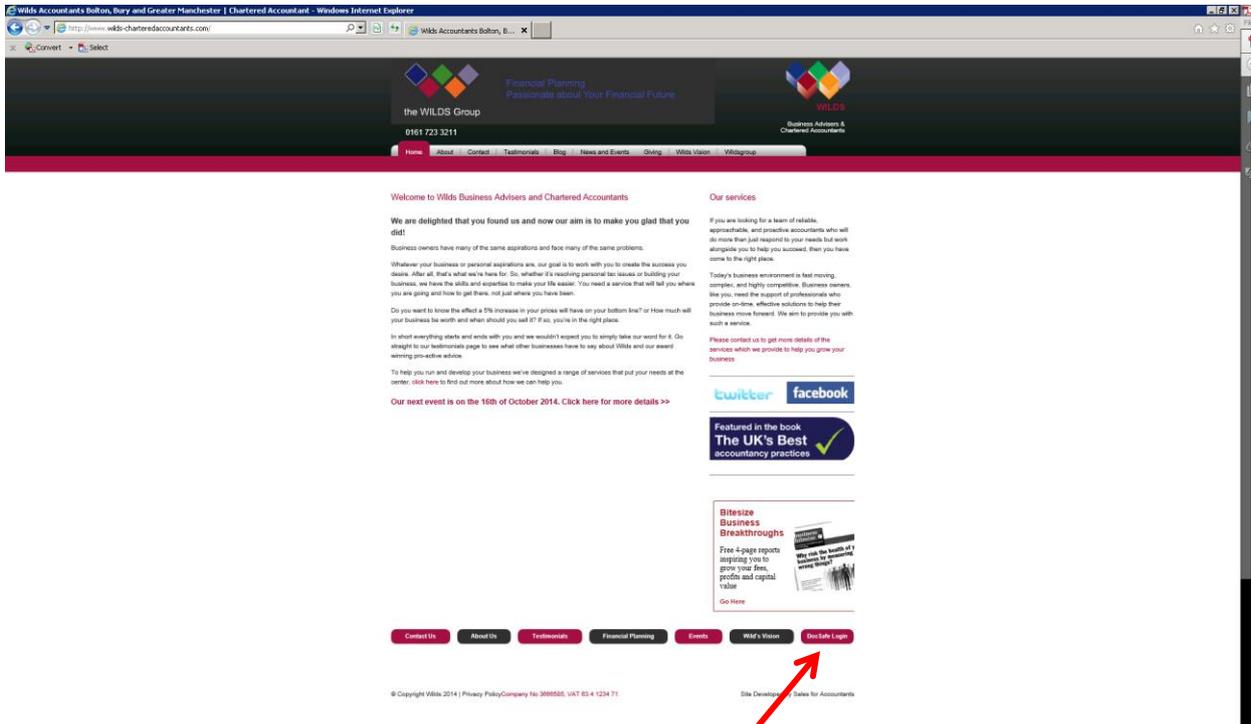# How to use DocSafe

Go to www.wildsca.com

The DocSafe Login icon is in the bottom right of the screen

It takes you to the login screen:

Enter your email address and the password that was emailed to you. If you do not have this password, enter your email address and hit the forgotten password link:
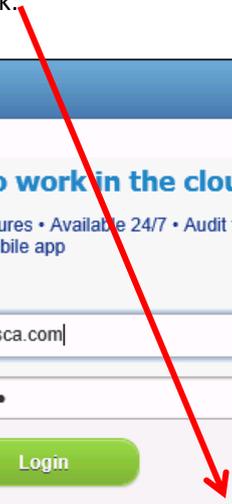
This takes you in to your DocSafe area:

If you need to change the name that is displayed on screen or change your password, please do so from the Settings screen.

Please note that Wilds cannot do this for you – we do not have access to these details.


Just type into the boxes to change them and remember to click the green box to save your settings.

To look at documents that have been put into DocSafe for you, go to the Folders screen:
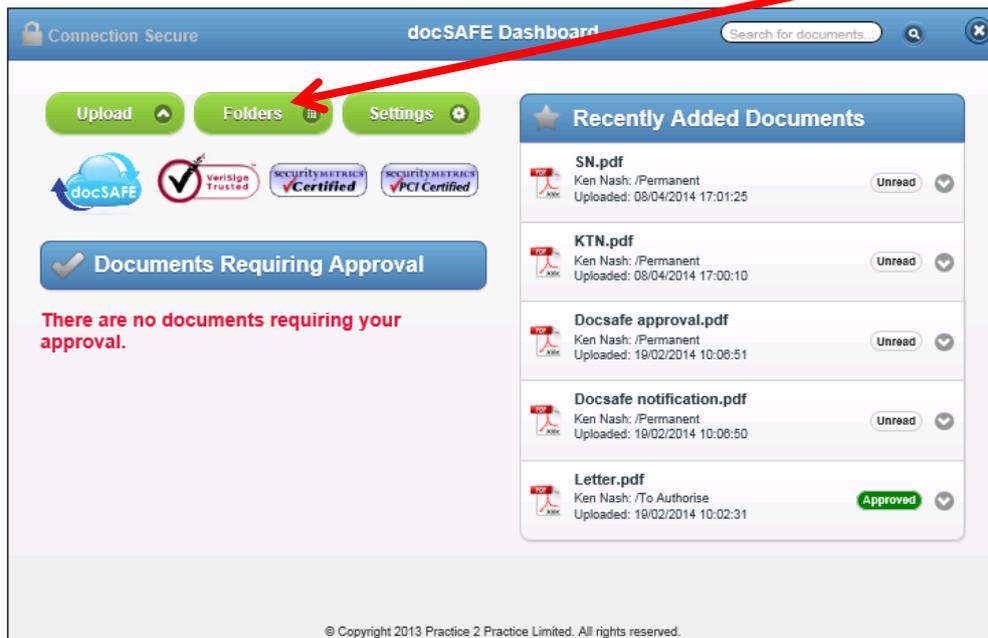

If you have access to more than one Username through the same email address (if, for example, you are a director of a company, you will see the Company folders and your own personal folder – this is so we can share access of the Company folders to each of the directors but we can keep your personal folder separate so only you can see it).

Just click on the + and – buttons to expand and minimuse the folders:
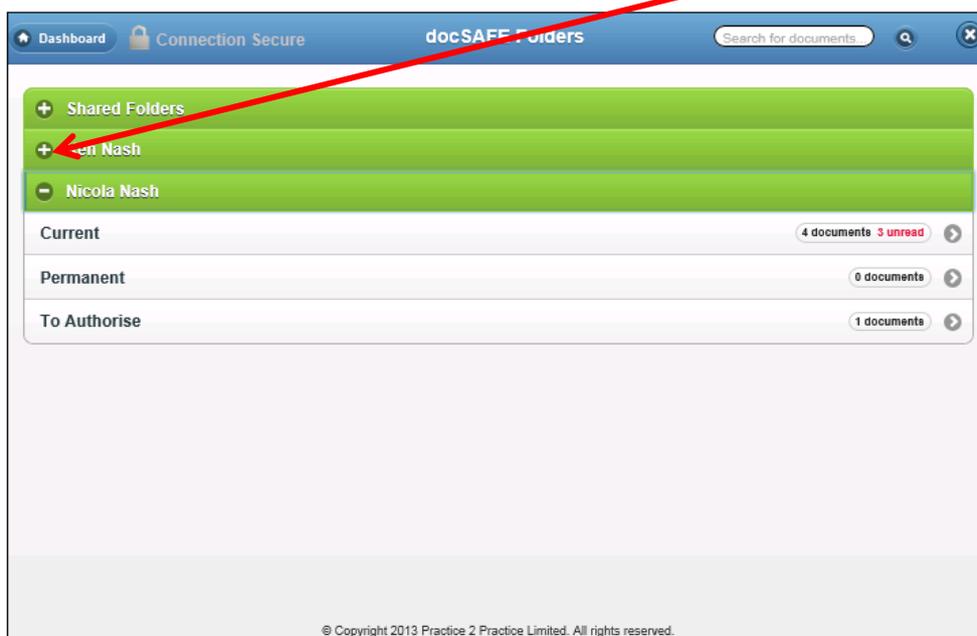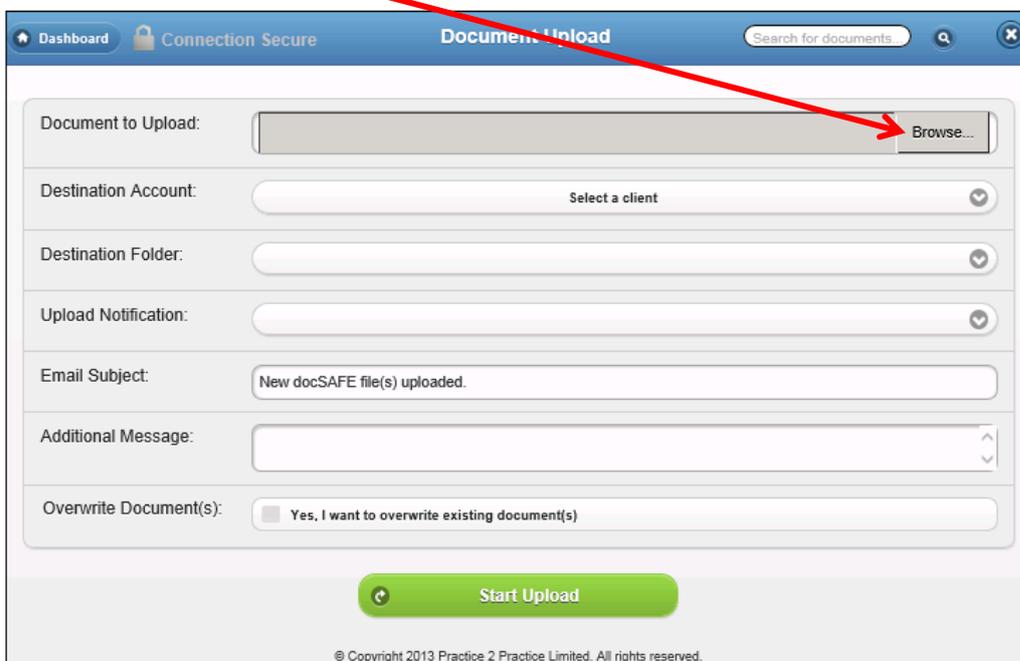
The email that is generated from Docsafe will tell you which folder we have put new documents into.

If you want to send something to us, use the Upload screen:
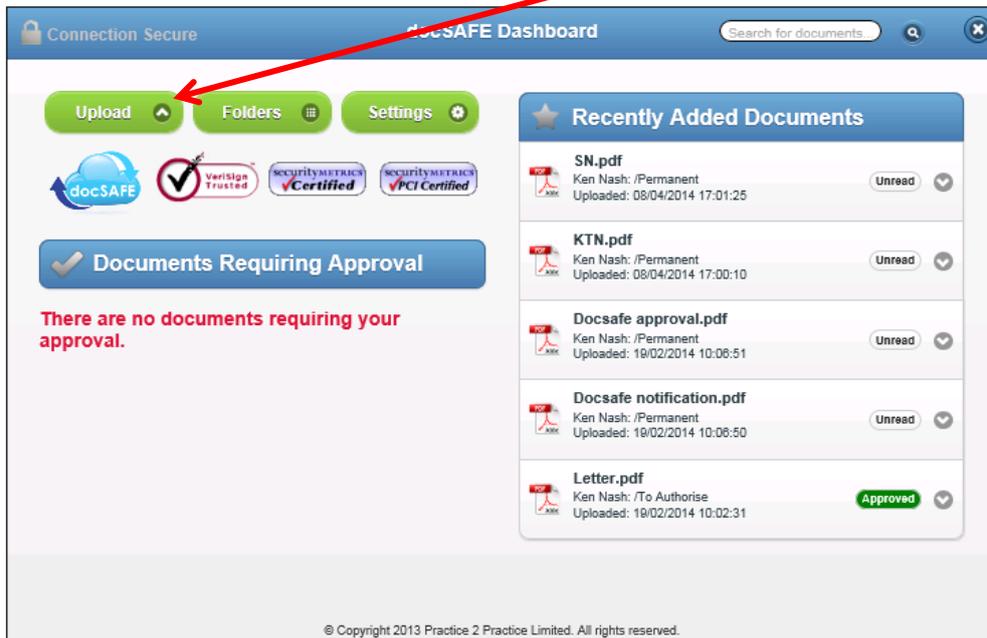
Browse to the document you want to send us (the same way you would if you were sending it as an attachment to an email).

Select your destination account from the dropdown list. It shows all the accounts you have access to.

Select a destination folder from the dropdown. As standard, these are Current, Permanent and To Authorise, however we can change these if you would prefer. For example, if we do your payroll, we will sometimes put a dedicated folder in – this is especially useful if you would like other members of your team to see some of your folders but not others – for instance we can set it so your bookkeeper could see your normal current folder and could access Sage details from there but we could restrict access to your payroll folder.

Upload notification – this dropdown lists the Wilds team. If there is a particular team member you deal with more often than anyone else, we will sometimes set the dropdown to default to that team member. Even if we have, you can still select anyone from the dropdown. It is this dropdown that determines who will receive the email from DocSafe to say that new documents have been uploaded.

You can type a message into this box
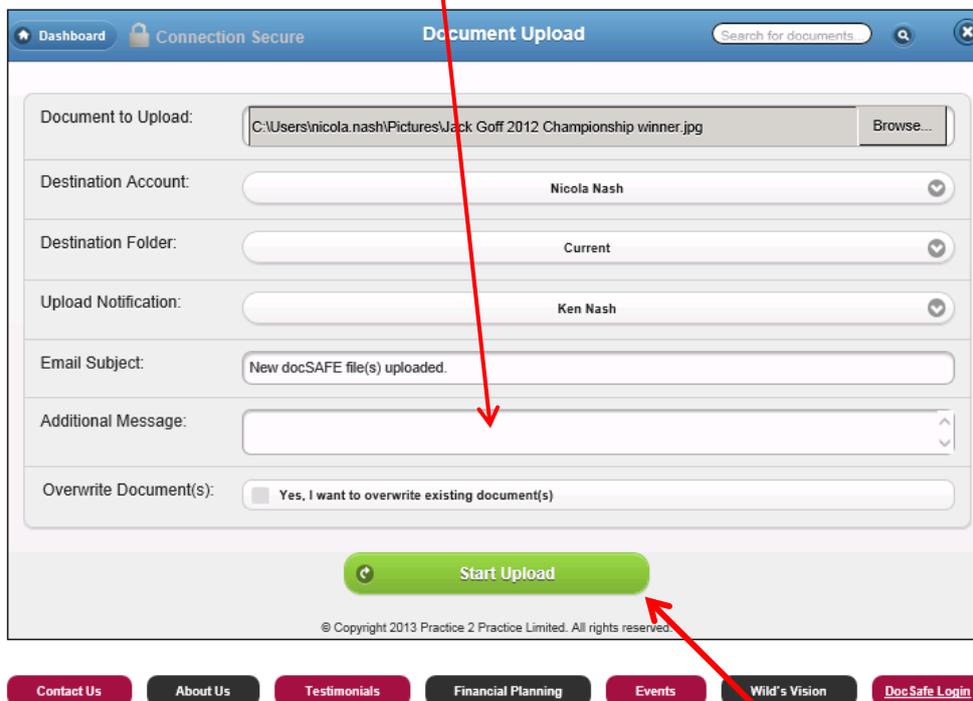
To send the document to DocSafe, click the green Start Upload button.