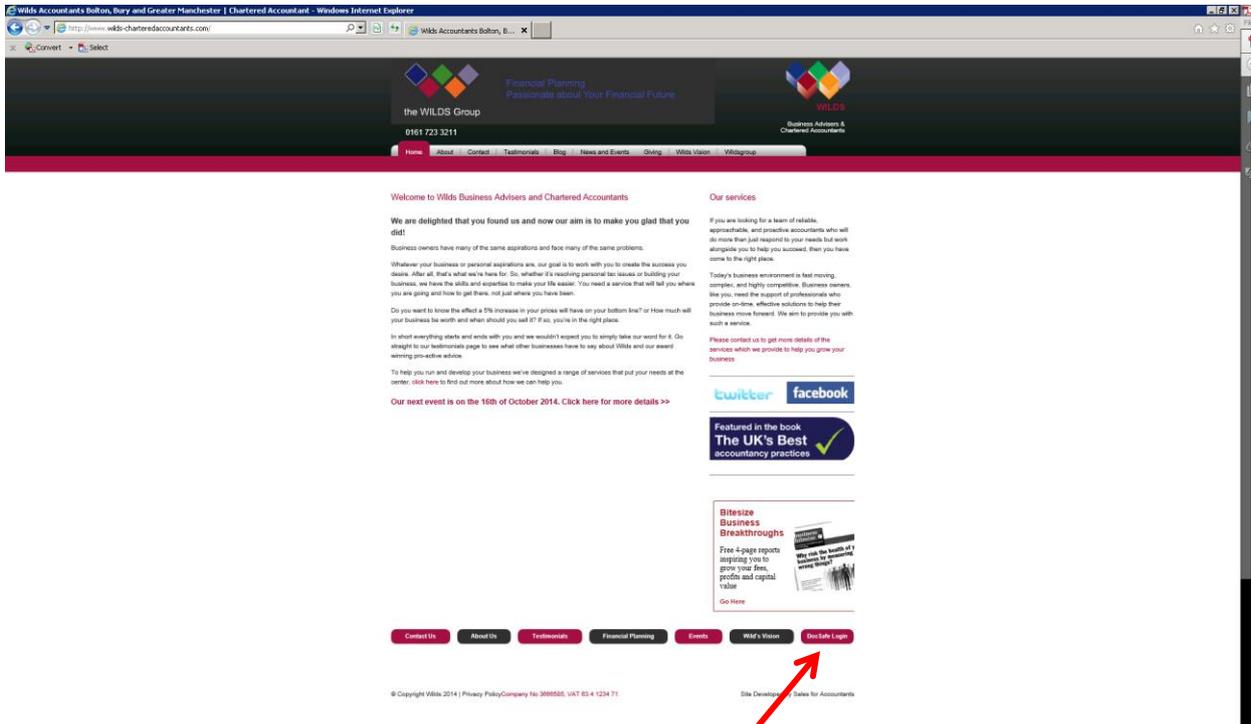


# How to use DocSafe

Go to [www.wildsca.com](http://www.wildsca.com)



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

It takes you to the login screen:

Connection Secure docSAFE Login

**docSAFE is the number one way to work in the cloud**  
Compliant, safe & secure file exchange • Electronic signatures • Available 24/7 • Audit trail  
Access via desktop browser or mobile app



Email:

Password:

Login

(forgot your password - enter your email address and [click here](#))

docSAFE work smarter, not harder



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- Doc Safe Login

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:

Connection Secure docSAFE Login

**docSAFE is the number one way to work in the cloud**  
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Access via desktop browser or mobile app



Email:

Password:

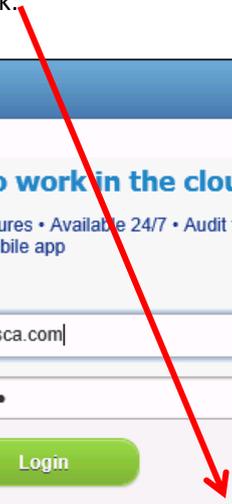
Login

(forgot your password - enter your email address and [click here](#))

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This takes you in to your DocSafe area:

The screenshot shows the docSAFE Dashboard interface. At the top, there is a navigation bar with 'Connection Secure' on the left, 'docSAFE Dashboard' in the center, and a search bar on the right. Below the navigation bar, there are three main buttons: 'Upload', 'Folders', and 'Settings'. The 'Settings' button is highlighted with a red arrow. To the right of these buttons is a 'Recently Added Documents' section containing a list of documents: SN.pdf, KTN.pdf, Docsafe approval.pdf, Docsafe notification.pdf, and Letter.pdf. Below the documents, there is a 'Documents Requiring Approval' section with a message: 'There are no documents requiring your approval.' At the bottom of the dashboard, there is a footer with copyright information and a row of navigation links: Contact Us, About Us, Testimonials, Financial Planning, Events, Wild's Vision, and Doc Safe Login.

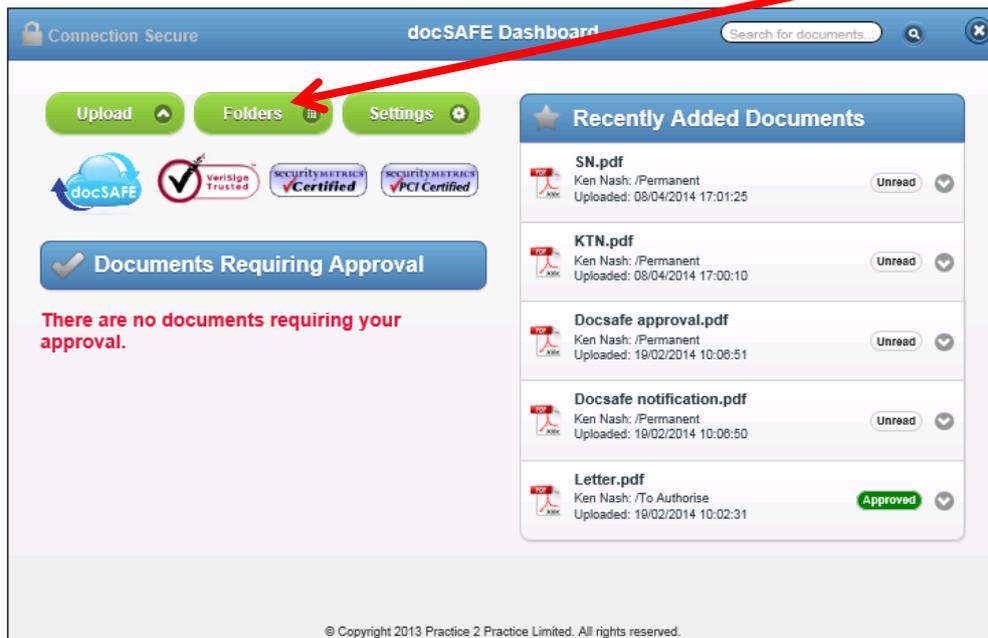
If you need to change the name that is displayed on screen or change your password, please do so from the Settings screen.

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

The screenshot shows the docSAFE Settings page. At the top, there is a navigation bar with 'Dashboard' on the left, 'Connection Secure' in the center, and 'docSAFE Settings' on the right. Below the navigation bar, there is a search bar. The main content area contains four input fields: 'Email Address' (with the value 'fautedemieux@msn.com'), 'Your Name' (with the value 'Nicola Nash'), 'New Password', and 'Confirm Password'. Below these fields is a green 'Save Changes' button. At the bottom of the settings page, there is a footer with copyright information and a row of navigation links: Contact Us, About Us, Testimonials, Financial Planning, Events, Wild's Vision, and Doc Safe Login.

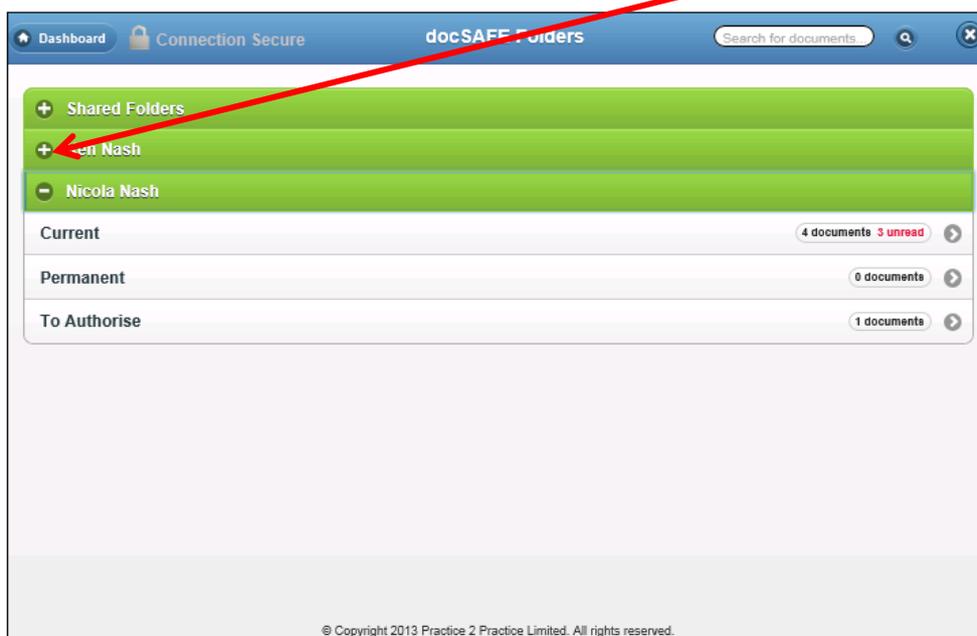
Just type into the boxes to change them and remember to click the green box to save your settings.

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



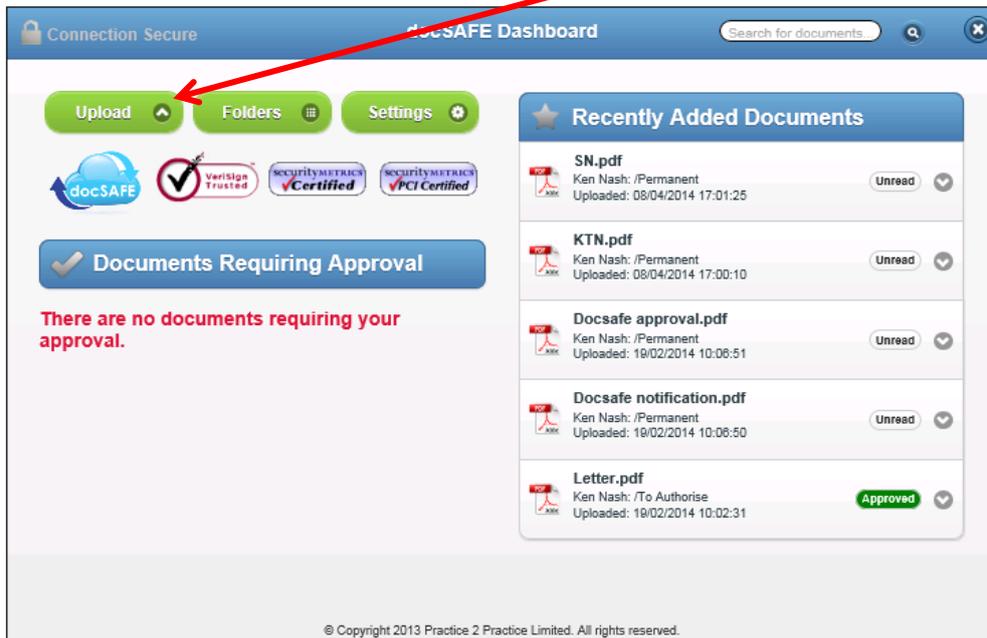
If you have access to more than one Username through the same email address (if, for example, you are a director of a company, you will see the Company folders and your own personal folder – this is so we can share access of the Company folders to each of the directors but we can keep your personal folder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

Just click on the + and – buttons to expand and minimise the folders:

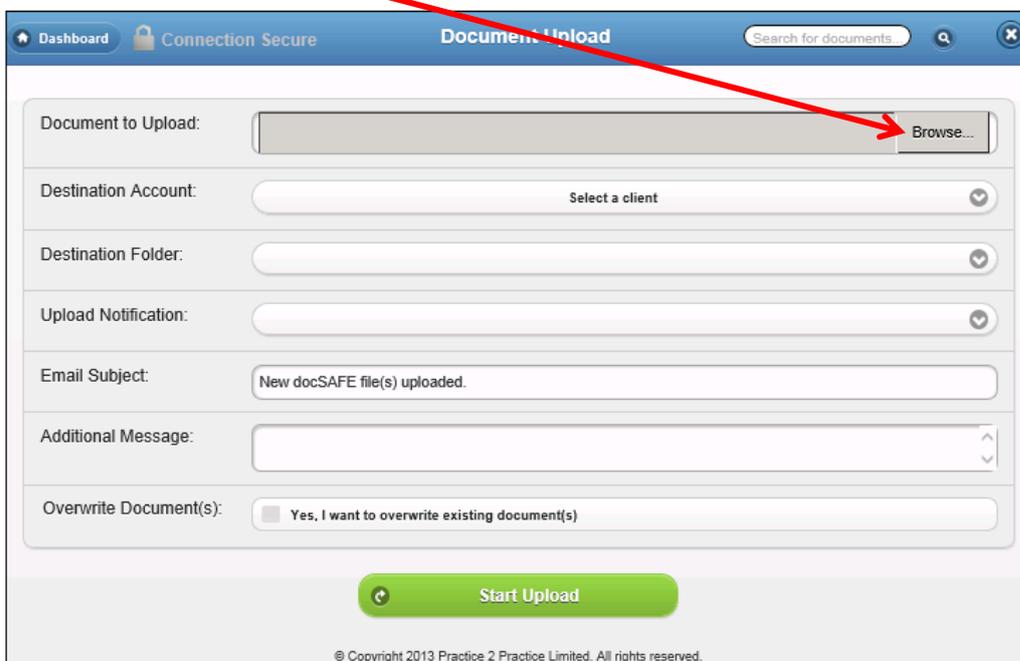


The email that is generated from Docsafe will tell you which folder we have put new documents into.

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.

The screenshot shows the 'Document Upload' interface. The 'Document to Upload' field contains the file path 'C:\Users\nicola.nash\Pictures\Jack Goff 2012 Championship winner.jpg'. The 'Destination Account' dropdown menu is open, showing a list of accounts: 'Select a client', 'Ken Nash', and 'Nicola Nash'. The 'Destination Folder' dropdown is currently empty. The 'Upload Notification' dropdown is set to 'select a recipient'. The 'Email Subject' field contains 'New docSAFE file(s) uploaded.'. The 'Additional Message' field is empty. The 'Overwrite Document(s)' checkbox is unchecked, with the label 'Yes, I want to overwrite existing document(s)'. A green 'Start Upload' button is at the bottom. The footer text reads '© Copyright 2013 Practice 2 Practice Limited. All rights reserved.'

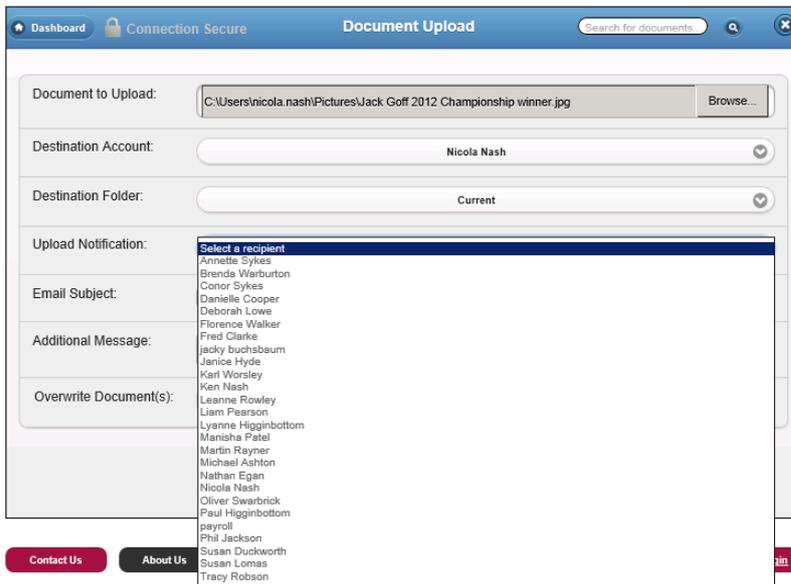
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Select a destination folder from the dropdown. As standard, these are Current, Permanent and To Authorise, however we can change these if you would prefer. For example, if we do your payroll, we will sometimes put a dedicated folder in – this is especially 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.

The screenshot shows the 'Document Upload' interface. The 'Document to Upload' field contains the file path 'C:\Users\nicola.nash\Pictures\Jack Goff 2012 Championship winner.jpg'. The 'Destination Account' dropdown is set to 'Nicola Nash'. The 'Destination Folder' dropdown menu is open, showing a list of folders: 'Select a folder', 'Current', 'Permanent', and 'To Authorise'. The 'Upload Notification' dropdown is set to 'select a recipient'. The 'Email Subject' field contains 'New docSAFE file(s) uploaded.'. The 'Additional Message' field is empty. The 'Overwrite Document(s)' checkbox is unchecked, with the label 'Yes, I want to overwrite existing document(s)'. A green 'Start Upload' button is at the bottom. The footer text reads '© Copyright 2013 Practice 2 Practice Limited. All rights reserved.'

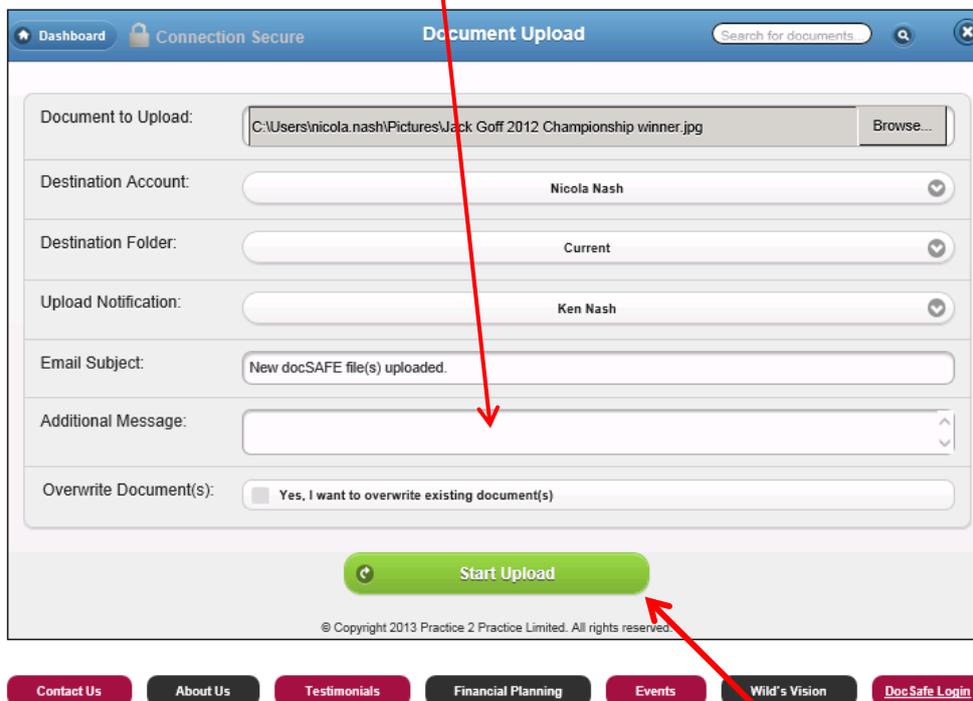
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Upload notification – this dropdown lists the Wilds team. If there is a particular team member you deal with more often than anyone else, we will sometimes set the dropdown to default to that team member. Even if we have, you can still select anyone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



The screenshot shows the 'Document Upload' interface. The 'Document to Upload' field contains the file path 'C:\Users\nicola.nash\Pictures\Jack Goff 2012 Championship winner.jpg'. The 'Destination Account' is set to 'Nicola Nash' and the 'Destination Folder' is 'Current'. The 'Upload Notification' dropdown is open, displaying a list of names: Annetta Sykes, Brenda Warburton, Conor Sykes, Danielle Cooper, Deborah Lowe, Florence Walker, Fred Clarke, jasky buchsbaum, Janice Hyde, Karl Worsley, Ken Nash, Leanne Rowley, Liam Pearson, Lyanne Higginbottom, Manisha Patel, Martin Rayner, Michael Ashton, Nathan Egan, Nicola Nash, Oliver Swarbrick, Paul Higginbottom, payroll, Phil Jackson, Susan Duckworth, Susan Lomas, and Tracy Robson. The 'Email Subject' and 'Additional Message' fields are empty. The 'Overwrite Document(s)' checkbox is unchecked. At the bottom, there are buttons for 'Contact Us' and 'About Us'.

You can type a message into this box



This screenshot shows the same 'Document Upload' form, but with the 'Additional Message' field highlighted by a red arrow. The 'Upload Notification' dropdown is now set to 'Ken Nash'. The 'Email Subject' field contains the text 'New docSAFE file(s) uploaded.'. The 'Overwrite Document(s)' checkbox is checked, with the label 'Yes, I want to overwrite existing document(s)'. A large green 'Start Upload' button is visible at the bottom of the form. A red arrow points from the text 'You can type a message into this box' to the 'Additional Message' field. Another red arrow points from the bottom right towards the 'Start Upload' button. At the bottom of the page, there is a navigation bar with buttons for 'Contact Us', 'About Us', 'Testimonials', 'Financial Planning', 'Events', 'Wild's Vision', and 'DocSafe Login'. The copyright notice '© Copyright 2013 Practice 2 Practice Limited. All rights reserved.' is visible at the bottom of the form.

To send the document to DocSafe, click the green Start Upload button.