WardWilliams

Portal Recipient Guide for Virtual Cabinet 3.2

virtualcabinet
DOCUMENT MANAGEMENT

Contents

1. Introduction

The Virtual Cabinet® Portal is used to exchange documents and information quickly between contacts.

This document is intended to assist those who have been sent documents or information via the Portal, also known as Recipients.

2. Account Activation

The first time you are sent a document through the Portal, you will receive an email notification. Before you can access the first document that has been published to you, you must activate your account. The email notification takes you through this process.

- Click the link within the email titled "Click on this link"
- You will be directed to a secure activate your account page on the virtualcabinetportal.com website and follow the instructions and click activate account.

Dear Sir/Madam,

██████ from ████████████████ has sent you a secure document that requires your signature.

This e-mail has been sent to ████████████ which is the address you should use when logging into the Virtual Cabinet® Portal.

Virtual Cabinet is a secure and audited document distribution and management system used by Lindenhouse (AL) Software Ltd to allow you to receive and digitally "sign" documents from within your own individual secure portal. The digital signature legally replaces a physical signature on a piece of paper.

Account Activation

Before you can access the document, you will need to follow our simple account activation process within 5 days of the date of this e-mail:

1. Click on this link - your browser should open and display the Virtual Cabinet Portal account activation page. A lot of the information is filled in for you - you just need to complete anything that's missing.

2. Your password must be at least 7 characters long and contain at least one upper case letter, one lower case letter and one digit. Choose something easy to remember, but difficult to guess. The gauge will show you how strong your password is.

3. Once you have completed all of the missing information, click on the 'Activate account' button and you will be able to see the document you have been sent.

Thank you

The Virtual Cabinet® Portal Team on behalf of

██████ ██████ from Lindenhouse (AL) Software Ltd

Email: ███████████████████████
Telephone: ████████████
Mobile: ████████████

The Virtual Cabinet® Portal is used by Lindenhouse (AL) Software Ltd as a secure and audited document distribution and management system. Learn more

- You will now be presented with the document, or pack of documents that was published to you.
- You may now access your Portal Account at any time from any device using a web browser and navigating to the following page and enter your login details:

https://www.virtualcabinetportal.com/MyPortal/Login

3. Forgotten Password

If you have forgotten your Password for the Portal, simply navigate to the following page:
https://www.virtualcabinetportal.com/MyPortal/Login

- Click the "Problems logging in?" link and follow the instructions.

## 4. Authenticating your Device & Browser and Signing Documents

This process will only need to be followed if you need to perform a task on a document, such as digitally sign it.
It will only be triggered if you are trying to perform such a task for the **first time** on a **new device** or using a **new internet browser**.

- When you are asked to sign a document, the email notification you receive will say so, and the **Sign and Reject** buttons will appear when you access the document in the portal.
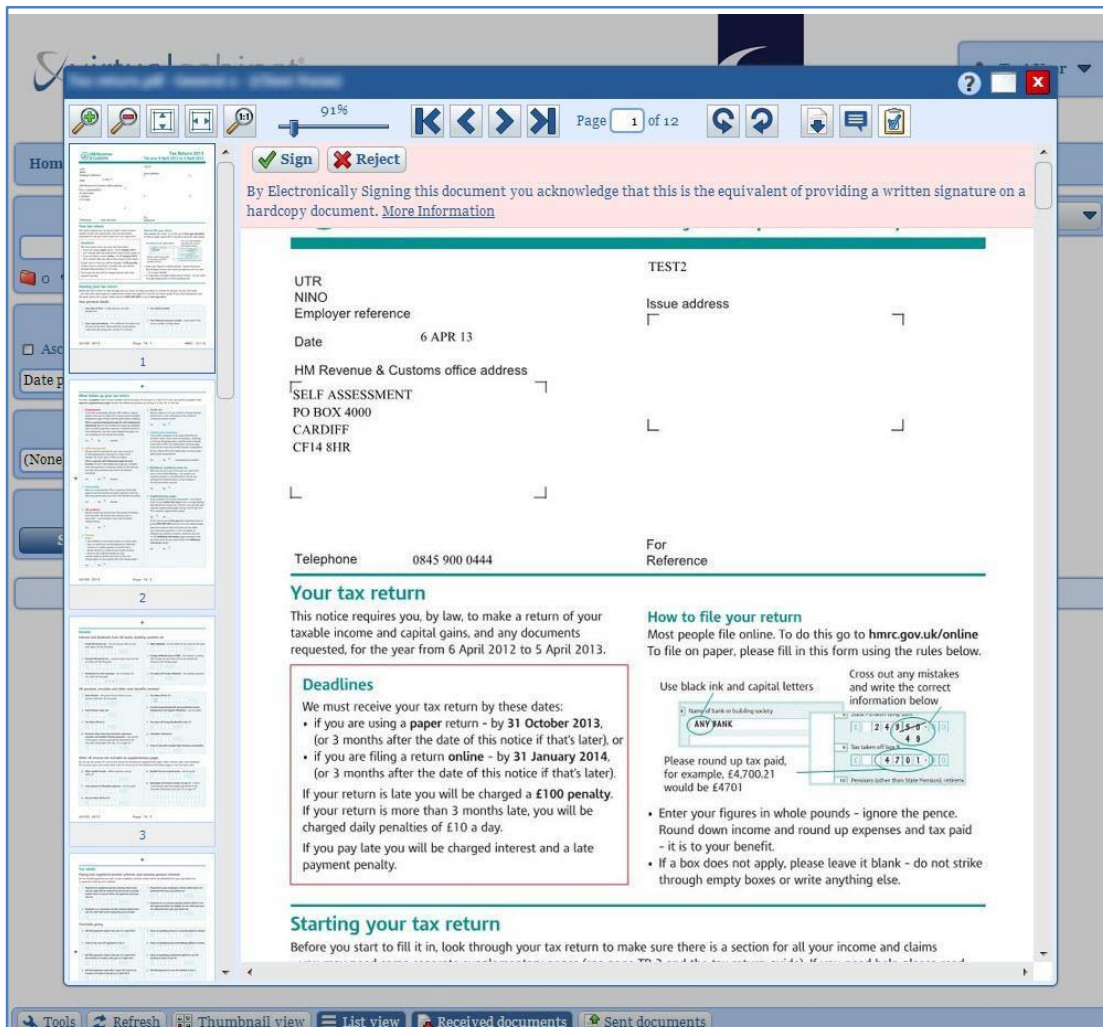
- When clicking the Sign button, you will be presented with a pop-up notification stating that you need to authenticate your device or browser and that you have **already been sent** and authentication email
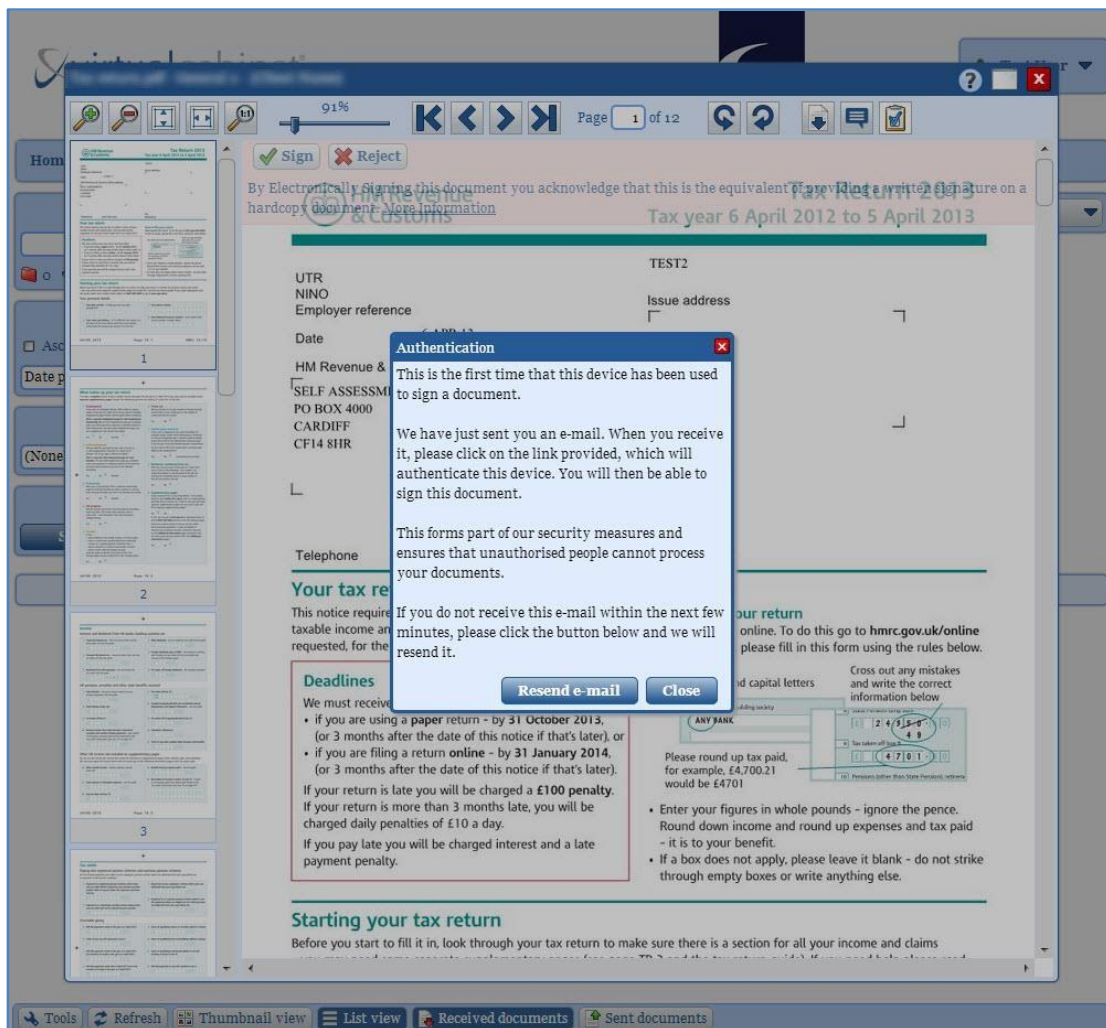
- Open the authentication email, click the link to enable the current device for signature approval (make sure you click or use this link on the same device and browser that you are using to sign the document).
- Specify if this device is for private use, or is a shared device
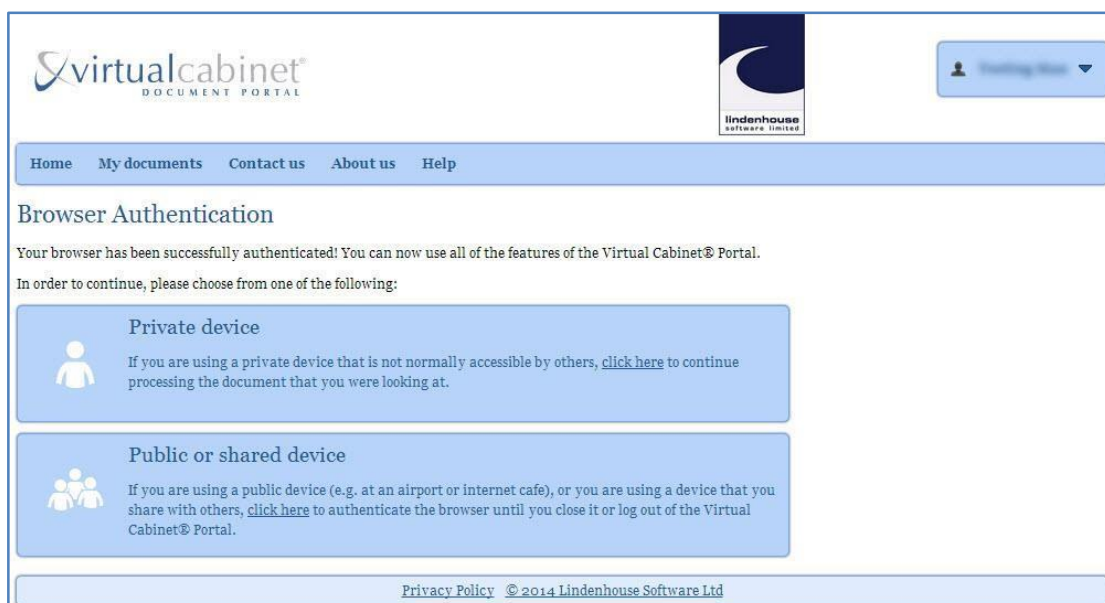
- You can now continue with the singing process.
- Click the "Sign" button to sign, add a message if you wish and send the document.
- You will receive a pop-up message stating that the document has been signed and returned.
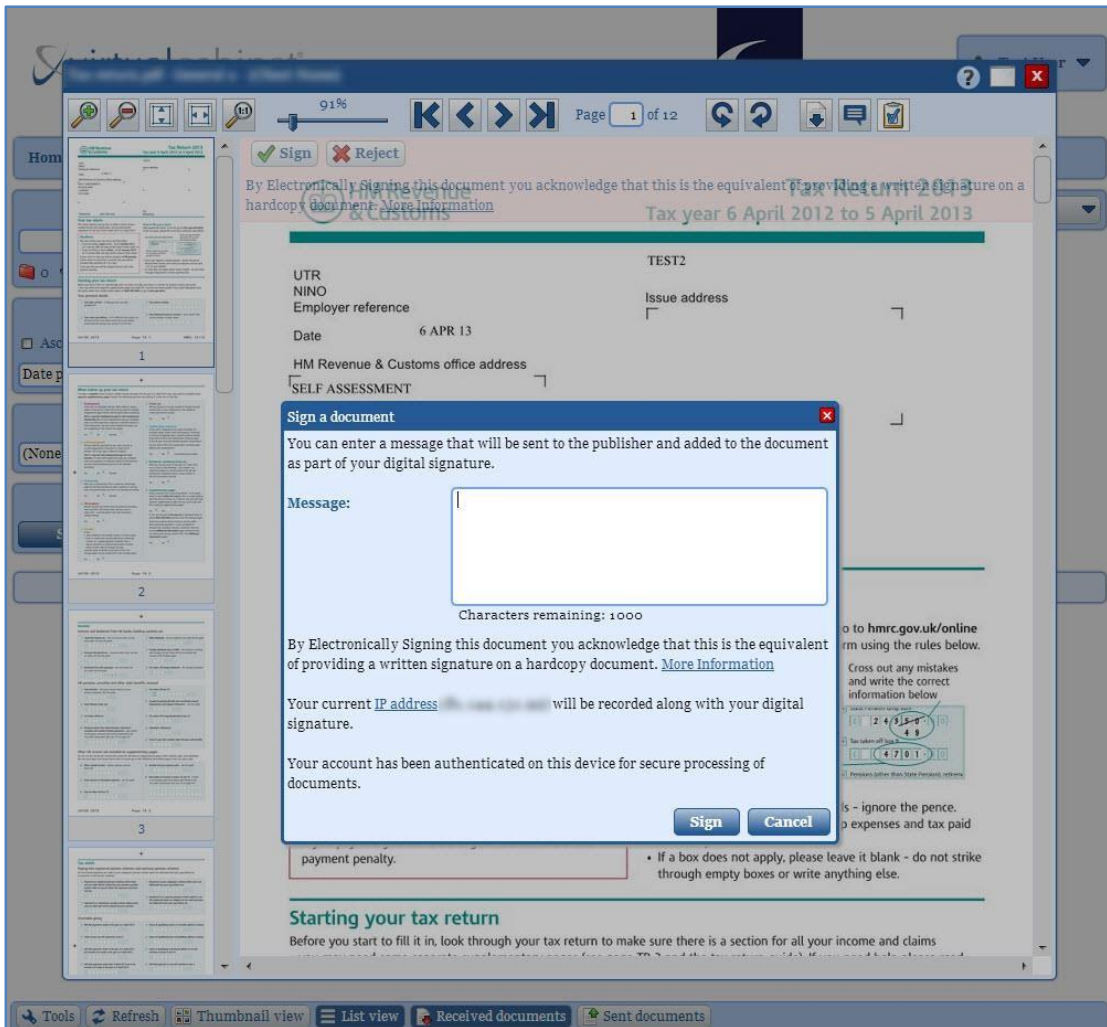
IMPORTANT NOTE: Documents will only remain on the portal for up to 2 months therefore we advise that you download a save a copy for your own records.

5. Troubleshooting

If you are having any issues with accessing the Virtual Cabinet Portal web-page, or logging into your Portal account, there are a few steps that you can take.

- Trouble related to accessing the Portal web-page may be due to networking issues. You may want to check your internet connectivity (either wired or Wi-Fi) and ensure that you do not have the website in your blocked URL settings.

- When logging on to the Portal, please ensure you use the email address and password that you provided when activated your Portal account. Double check the email address by checking the notification you received from the Portal.

- If you are using autofill information within the Portal when logging in, ensure that there are no blank characters before or after your user credentials as this can cause login issues due to the 50 character limit.

- Ensure you are using the latest version possible of your web-browser as this will help with navigating the site, and will allow you the most functionality of the Portal. This also helps to keep your browser safe from vulnerabilities.

- If your browser has add-ons, extensions, or toolbars that have been installed then these can interfere with the usability of websites, including the Portal. If you have any issues relating to the Portal that seem unusual, try installing another browser, removing the add-ons/extensions/toolbars, or resetting your current browser back to its default settings. Recommended browsers are Internet Explorer, Google Chrome, Mozilla Firefox, and Apple Safari (browsers are not limited to those mentioned above).

- Ensure your cookies and JavaScript settings are correctly configured in your browser. If these may be causing you a problem, try resetting the browser back to factory defaults as mentioned above.

- If you have any further issues with Portal documents, please contact Ward Williams.