Instructions to use our new document signing system and client document portal

Background

At Prime we file documents electronically using a system called Virtual Cabinet.

Virtual Cabinet Document Portal is an extension of our internal document management system which enables us to send you documents securely either for you to sign electronically or just for your reference.

We will be using this new system as much as possible for the signing of Accounts, P11Ds, Engagement letters as well as personal tax returns *(if you prefer to continue to receive documents through the post – that will be fine)*.

This will save you the trouble of putting them back in the post to us, turn around will be much quicker, and they will be available to you at any time by logging into the portal.

The VC Portal will gradually take over from DocSafe, the previous portal we used, which did not link to our in- house document management system.

How to use the Portal when receiving a document from us for the first time

Before you access the portal for the first time you will need to set up a password to use in combination with your email address to log in to the Portal.

CHARTERED ACCOUNTANTS

Dear

Elaine Davies from Prime Chartered Accountants 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 Prime Chartered Accountants 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

Elaine Davies from Prime Chartered Accountants

Email: edavies@primeaccountants.co.uk
Telephone:

The Virtual Cabinet® Portal is used by Prime Chartered Accountants as a secure and audited document distribution and management system. Learn more

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If you believe you have received this email in error, please notify the sender accordingly using the contact information above and delete this email. Do not reply to this message.

If you click on **Click on this link**, you will be presented with the following page:-

prime
ACCOUNTANTS GROUP

virtualcabinet®
DOCUMENT PORTAL

Home   My portal   Contact us   About us

Activate your account

Your Virtual Cabinet © Document Portal account has not yet been activated.

Fields marked with * must be entered.

E-mail address *
Note: this must be the e-mail address where you received the activation e-mail

Password *
Strength: Very poor

Confirm password *

Title *

Forename *

Surname *

Landline telephone number

Mobile telephone number

Country

Tick to confirm that you agree to the Terms and Conditions *

Tick to confirm that you are 18 or over *

Tick to confirm that you agree to receive and sign documents electronically *

Activate account

E-mail Address
Enter the e-mail address that will be used to access your Virtual Cabinet Portal account. Note that this must be the address that the activation e-mail was sent to, which is shown in the e-mail for your convenience.

We ask you to enter your e-mail address for security reasons: it allows us to check what you enter against our records and thus confirm that the correct person is activating your account.

Password
Enter a password that you can easily remember, but is difficult to guess. Please do not use the Authentication Code shown in your activation e-mail! For security purposes, your password must be at least 7 characters long and contain at least one upper case letter, one lower case letter and one digit (0 to 9).

Confirm password
Enter the same password again so that you can be sure that you haven't mis-typed anything.

Title
If the correct title (Mr, Mrs etc.) is not shown, select it from the list provided.

Forename
Check that we have the correct forename and correct it if necessary.

Surname
Check that we have the correct surname and correct it if necessary.
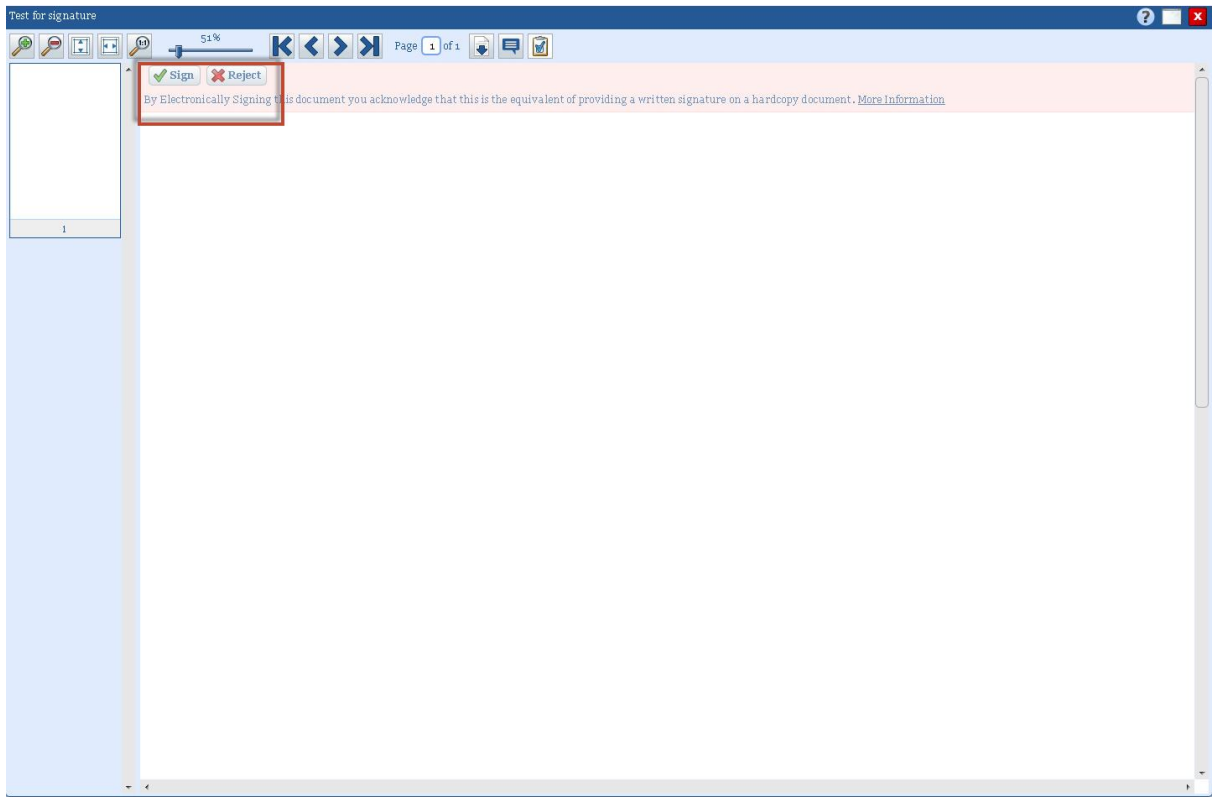
Landline telephone number

Privacy Policy   © 2014 Lindenhouse Software Ltd

Complete the required boxes and click **Activate account.**

Please note that the password must include at least one number and both lower and upper case characters. It must be at least 7 characters long.
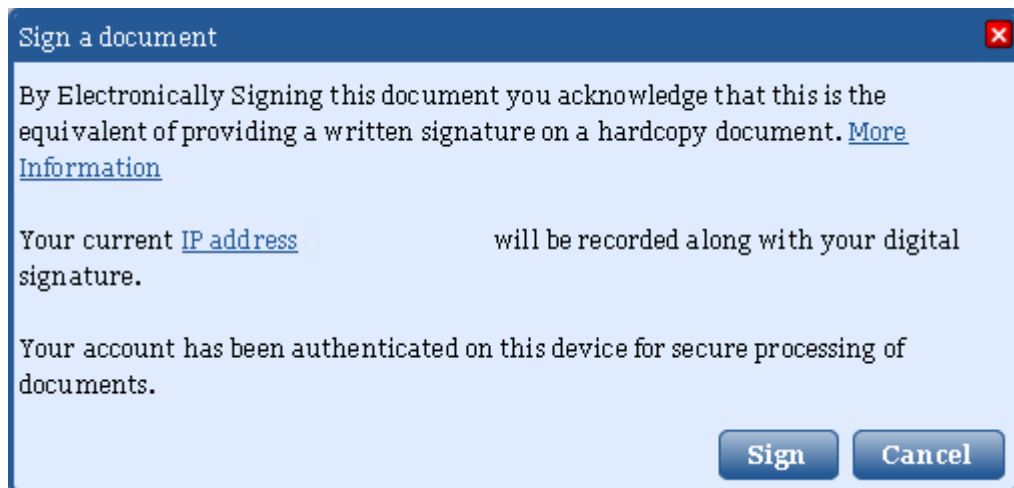
We do not have access to your password – if you forget it you will need to use the forgotten password link.
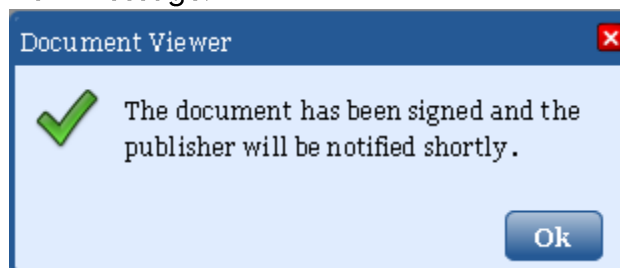
Once completed, you will be shown the document, or documents, to sign and the screen will look similar to the following:-
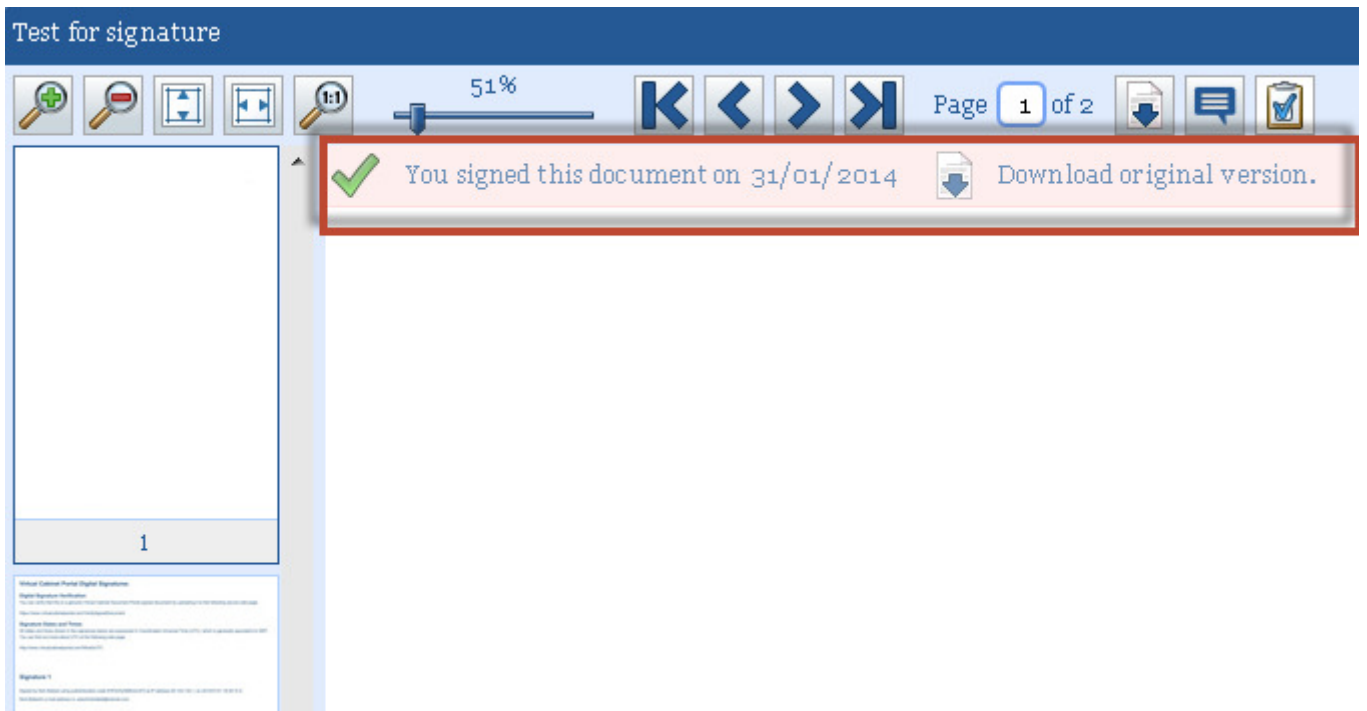

Clicking **Sign** will show the following message:-

Clicking **Sign** shows the next message:-

Clicking **OK** changes the document header to show:-

The next time we send you a document

Clicking on the **View the Document** link in our email should take you to this screen:

Log in to your Virtual Cabinet Portal account

| Home | My portal | Contact us | About us |

E-mail address

Password

☐ Remember my e-mail address next time

Log in Forgotten your password?

If you have not activated your account, please click here.

VERIFY ▸ **Norton** SECURED powered by **VeriSign**

Important

Please note that, by logging into the Virtual Cabinet Portal, you are accepting our use of cookies in order to secure your access to the site. Please click here to see why cookies are required in order to log in and refer to our Privacy Policy for more information.
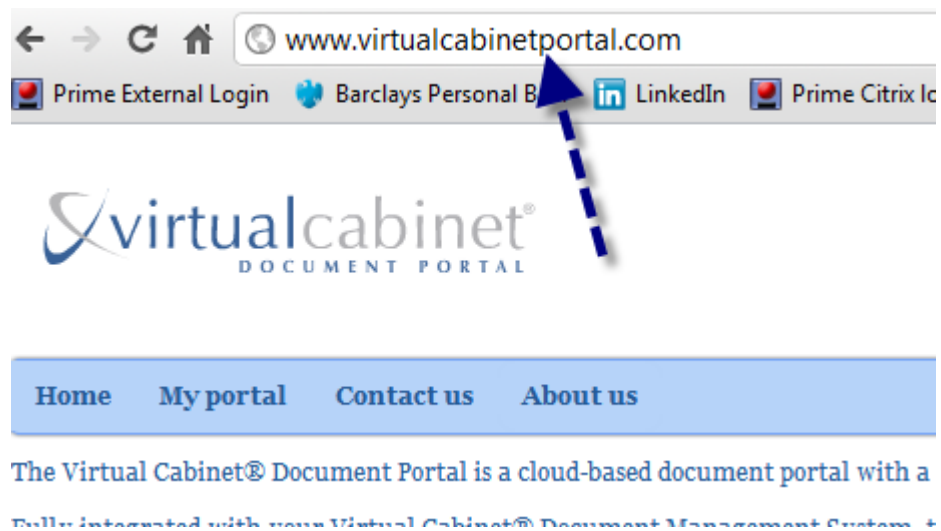
If you tick the box 'Remember my e-mail address next time' above, you are consenting to us storing your e-mail address in a cookie so that we can retrieve it next time you visit the site. This cookie is not used for any other purpose.

... where you can log in and view and sign your documents

How to view the documents we have added into your Portal

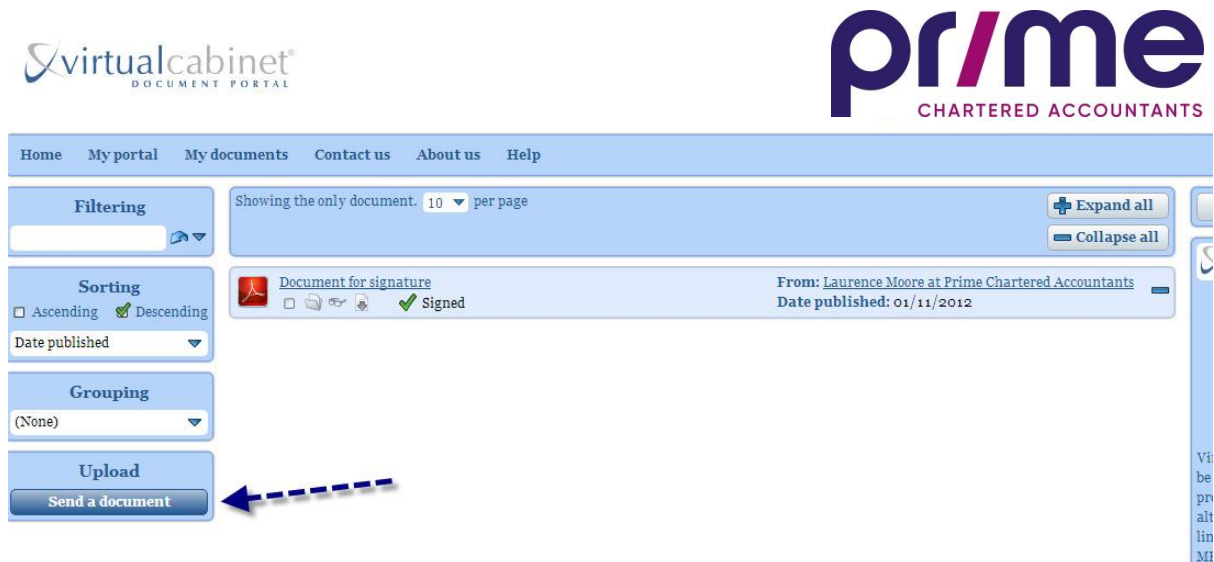If, at anytime, you want to log into the portal to view your documents, you need to go to this secure website:

… and you will be able to login on the right hand side of the screen, using the email address and password you registered with.

How to send us documents securely

You are able to send us documents through the Portal.

To do that, log in to the Portal and then click on this button:

You will then be able to browse to select a document from your PC and choose who at Prime to send it to *(at the moment you will only be able to send it to someone at Prime who has previously sent you a document).*

Any questions on how to use the Portal, please contact Nick Ballard at Prime on **024 76 518555.**