



GETTING STARTED WITH DOCSAFE

Welcome to Docsafe. Feel free to explore and try things out. Take a look at the online signing options, quickly learn how to message securely, upload files, run reports, create editable forms, set up client folders and grant staff access to them – and much more. You can't make a mistake or break anything we can't fix or revert so don't hold back!

To get you started it's worth spending a few minutes on each of the YouTube videos we've put together to help explain various aspects of the portal. These are all listed below.



LIFE INSIDE THE DOCSAFE APP



PREMIUM FEATURES AND THEIR USES



YOUR CLIENT'S EXPERIENCE

[Setting up your staff app \(PC\)](#)

[Setting up your staff \(Notes for Mac\)](#)

[Let's get started](#)

[Creating your first client account](#)

[Bulk uploading of clients](#)

[How do I upload files?](#)

[How do I upload files for clients to sign?](#)

[How do I search inside Docsafe?](#)

[All you need to know about users](#)

[Working with folders](#)

[All you need to know about emails](#)

[Running docsafe reports](#)

[Staff access to clients \(business units\)](#)

[How do I create editable forms?](#)

[Auto-filling form fields](#)

[Prefill locking on dynamic forms](#)

[Secure messaging](#)

[One click to view a file](#)

[Using 2 factor authentication](#)

[Private folders](#)

[The pre-approval process](#)

[Signature sequencing](#)

[Quikview – signing](#)

[Quikview – every combination](#)

[First impressions](#)

[Signing a file](#)

[Uploading a file](#)

[Changing settings](#)

[Searching for files](#)

[Mobile version](#)

[Helping to reset your client's password](#)

[Zipping large numbers of files for client download](#)

[New form filling interface release 2.1.13](#)

[Quikview – super quick](#)

NEED MORE HELP?

We are on hand to provide any support you need. Send your enquiry or question to our Zendesk support team and we will respond quickly. We are dedicated to making sure you can get the very best from Docsafe.

support@doc-safe.zendesk.com