

**YOUR GUIDE TO THE
SOPHER + CO
CLIENT PORTAL**

WHY USE THE SOPHER + CO CLIENT PORTAL?

The Client Portal will be used to exchange documents in a secure manner, as well as obtaining signatures when required.



ENCRYPTION

Data, documents and files stored in the portal are hashed or encrypted using AES-256 (where applicable).

DATA STORAGE

The Client Portal uses infrastructure and services provided by Amazon Web Services (AWS). AWS infrastructure puts strong safeguards in place to help protect customer privacy. All data is stored in highly secure AWS data centers.



INFILTRATION

The Virtual Cabinet Portal is secured behind multiple firewalls. It has been strengthened to resist attack methods such as brute force password ciphers, cross-site scripting (XSS)

AUDITING

Every action that occurs within the portal is logged and recorded against the individual that performed it, providing a complete and compliant audit log.



HOW TO ACTIVATE YOUR ACCOUNT

The first time you are sent a document through the Portal, you will receive an email notification guiding you through the activation process. Read through the instructions and click the link within the email 'click on this link' to be redirected to a secure 'Activate Your Account' page.

Fill in your details as requested and, once finished, click on 'Activate Account'.

You will then be presented with the document or pack of documents that was published to you.

You can now access the Portal from any device via this link <https://www.virtualcabinetportal.com/MyPortal/Login>

HOW YOU WILL BE NOTIFIED OF NEW DOCUMENTS

Anytime we publish documents or files to you, you will receive an email notification from us which will include a link to access your documents.

HOW TO SEND DOCUMENTS

Once you have an account with the portal, you can send documents in two ways:

1. By responding to a document submission request – once logged in, you will be taken to a screen with a document requesting information. All you need to do is click Reply at the top of the screen. This will show a screen allowing you to choose a document from your computer*, as well as an area to add an optional message. Once you have uploaded your documents, click 'Send' and a confirmation of submission will appear on your screen.
2. By sending documents at will – you can submit a document at any time via the portal main page. This is located under the 'Compose' box.

*You can choose up to 5 documents at a time and up to 100MB per document.

HOW TO SIGN DOCUMENTS

Click the link in the notification email you received and, after signing into the Portal, you will be presented with the document.

To sign it simply click the sign button at the top of the document and follow the instructions.

Once the document has been signed, you can download a copy to your machine for your records.

HOW TO AUTHENTICATE YOUR DEVICE AND BROWSER

If you are trying to sign a document on the Portal from a new device or a new browser, we need to ensure that your Portal account has not been compromised.

When clicking the Sign button, you will be asked to authenticate your device or browser by email. Click on the link within the authentication email, ensuring you do so on the same device and browser you are trying to authenticate, and you will then be redirected to the signing process.

YOU FORGOT YOUR PASSWORD

On the [login page](#), click on 'Having problems?' and you will then be presented with a page asking for your email address so that the Virtual Cabinet Portal can send a password request link to you.

Enter your email address and click the 'Continue' button.

Check your inbox for the email sent by the Portal and, once you receive it, click the 'Reset my password' link.

Type in your new password and click 'Save Changes' once you are finished.

You can now login into the Portal with your new credentials.

THE PERSON YOU WANT TO SEND DOCUMENTS TO IS NOT LISTED

Please contact us and we will send you a request for documents.

YOUR DISPLAY NAME IS INCORRECT

Log into the Portal and click on your name at the top right of the page. Select your profile and edit your name.

YOUR INTERNET SECURITY PACKAGE IS STOPPING YOU FROM ACCESSING THE PORTAL

Ensure <http://www.virtualcabinetportal.com> is added to your 'Trusted Sites' list.

YOU ARE EXPECTING AN EMAIL FROM THE PORTAL AND IT HASN'T COME THROUGH

Please check your spam folder and ensure you add notifications@virtualcabinetportal.com to your contact list

For further information, please get in touch with your usual Sopher + Co contact or call our offices:

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