



Portal Recipient Guide

For Virtual Cabinet



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1 Introduction

Individuals and Organisations all over the world use the Virtual Cabinet® Portal to exchange documents and information quickly and securely with their customers, suppliers and 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 steps you through this process.

Simply read through the instructions in the email, and click the link within the email titled “Click on this link”.

Dear Sir/Madam,

Carter Backer Winter LLP Payroll Department from Carter Backer Winter LLP (CBW) has sent you a secure pack of documents.

This email has been sent to ijones@cbw.com, which is the address you should use when logging in. Please do not reply to this email. This mailbox is not monitored and you will not receive a response.

This pack of documents will be available in the Portal for 91 days and 23 hours.

The Portal is a secure and audited document distribution and management system used by Carter Backer Winter LLP (CBW) 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 pack of documents, 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.
3. Once you have completed all of the missing information, click on the 'Activate account' button and you will be able to see the pack of documents you have been sent.

Thank you

After clicking the link, you will be directed to a secure Activate your account page on the virtualcabinetportal.com website.

Activate your account: Step 1 of 2

LOGIN DETAILS

PERSONAL DETAILS

Welcome to our secure portal

Our portal allows us to communicate with you efficiently and securely.

You need to create your own password and activate your account before you can access the information we have sent you.

Email address

Tysons@pghenrglobe.co.uk

Password

••••••••



Great

••••••••



Next

[About our portal](#)

We use the highest levels of encryption and latest security methodologies

Protection of your privacy and your data is our top priority

Access your information and documents any time, anywhere on any device

Our portal allows us to deliver you the very best service

Activate your account: Step 2 of 2

Almost done...

LOGIN DETAILS

PERSONAL DETAILS

Title

Mr



First name

Someone



Last name

Somewhere



Country

United Kingdom



Telephone number

+44 01234567890



Mobile number

+44 07777123456



I agree to the use of cookies on this device to enhance my experience. [Further information.](#)

I agree to the [Terms & Conditions.](#)

Activate account

We use the highest levels of encryption and latest security methodologies

Protection of your privacy and your data is our top priority

Access your information and documents any time, anywhere on any device

Our portal allows us to deliver you the very best service



Please complete the activation process as instructed.

Once you have completed this, please click “Activate account”.

Once you have clicked “Activate account”, you will 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:

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

Simply type in your Email address and Password that you used to activate your account and click the “Log In” button. You can tick the box to remember your password if you wish.

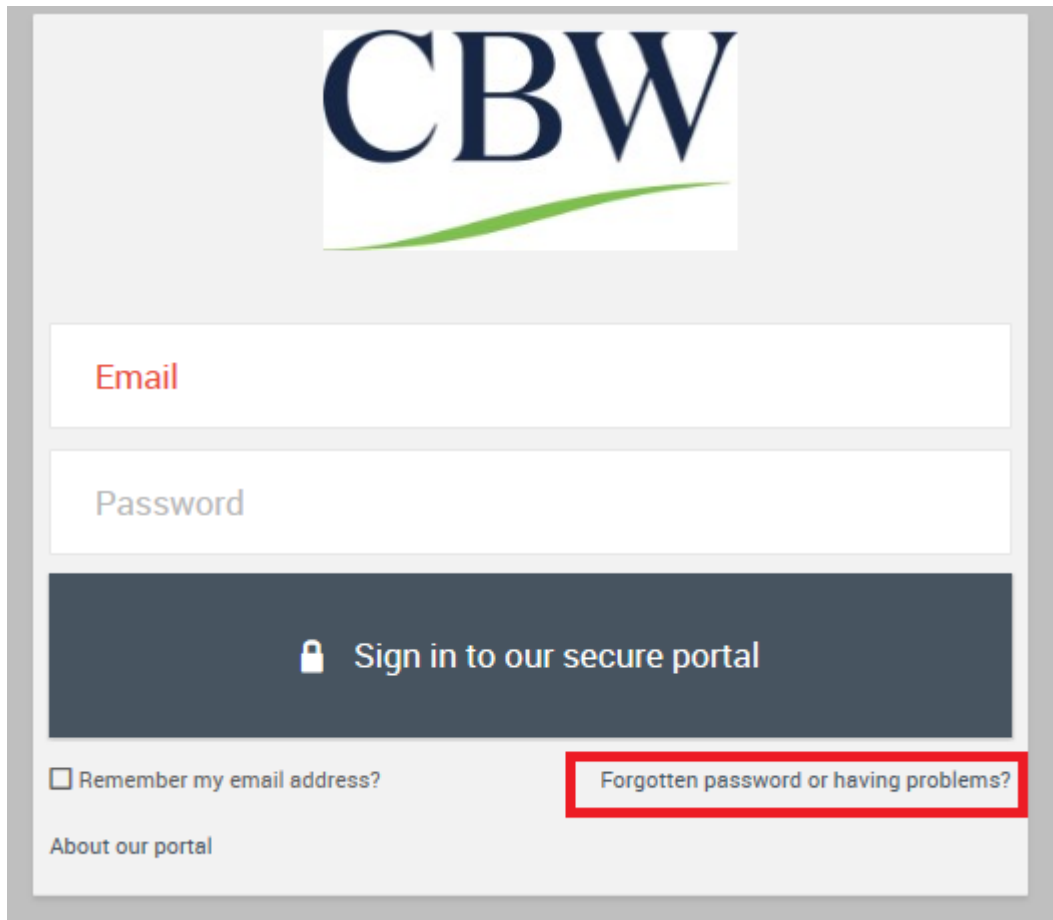
A screenshot of the CBW login portal interface. At the top center is the CBW logo. Below it are two input fields: the first is labeled 'Email' in red text, and the second is labeled 'Password' in grey text. Below these fields is a dark blue button with a white lock icon and the text 'Sign in to our secure portal'. At the bottom left, there is a checkbox labeled 'Remember my email address?'. At the bottom right, there is a link that says 'Forgotten password or having problems?'. At the very bottom left, there is a link that says 'About our portal'.

3 Forgotten Password

If you have forgotten your Password for the Portal, simply navigate to the following page:

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


And click the “Having problems?” link as seen below.



CBW

Email

Password

 Sign in to our secure portal

Remember my email address?

[Forgotten password or having problems?](#)

[About our portal](#)

Once you have clicked the link, you will be presented with a page asking for your email address so that the Virtual Cabinet Portal can send a password request link to you.

Simply enter your email address and click the “Continue” button.

Access Account

Enter the e-mail address associated with your account. We'll send you a link to reset your password or activate your account if you have not already done so.

✓

Continue

Has your e-mail changed? If you no longer use the e-mail associated with your Virtual Cabinet ® Portal account, you may [contact](#) Customer Service for help with restoring access to your account.



We use the highest levels of encryption and latest security methodologies



Protection of your privacy and your data is our top priority

You will then be presented with a page explaining that the password reset request has been entered and that you will receive an email shortly.

Access Account

Your request has been received. You will shortly receive an e-mail from Virtual Cabinet ® Portal.

When you receive the e-mail, click on the link and you will be directed to a page where you can create your new password or activate your account.

Important: the link will only be valid for a limited time so please make sure that you create your new password as soon as you receive the e-mail.



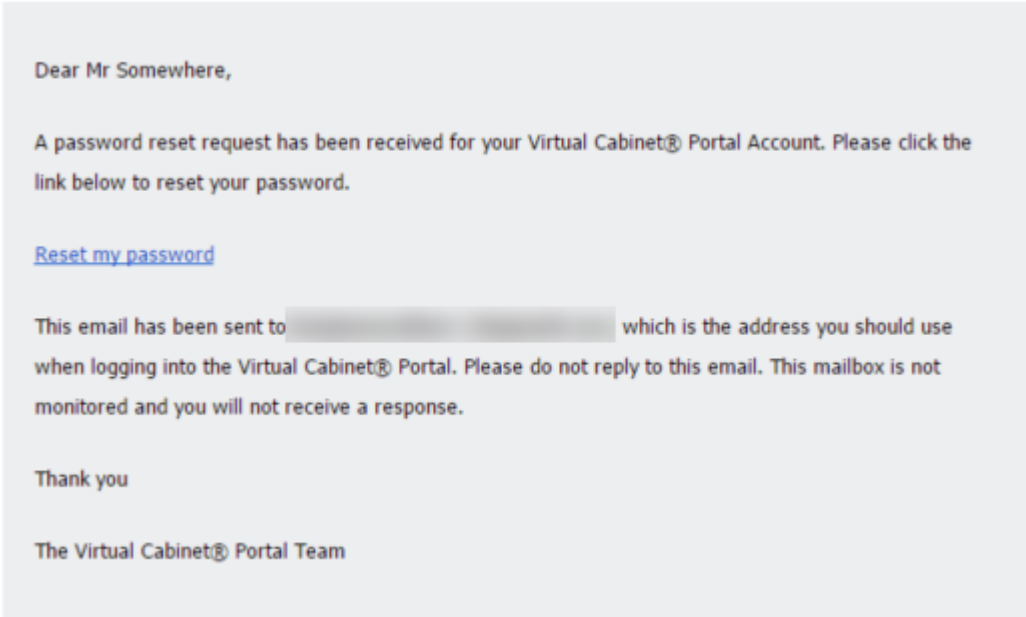
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Protection of your privacy and your data is our top priority

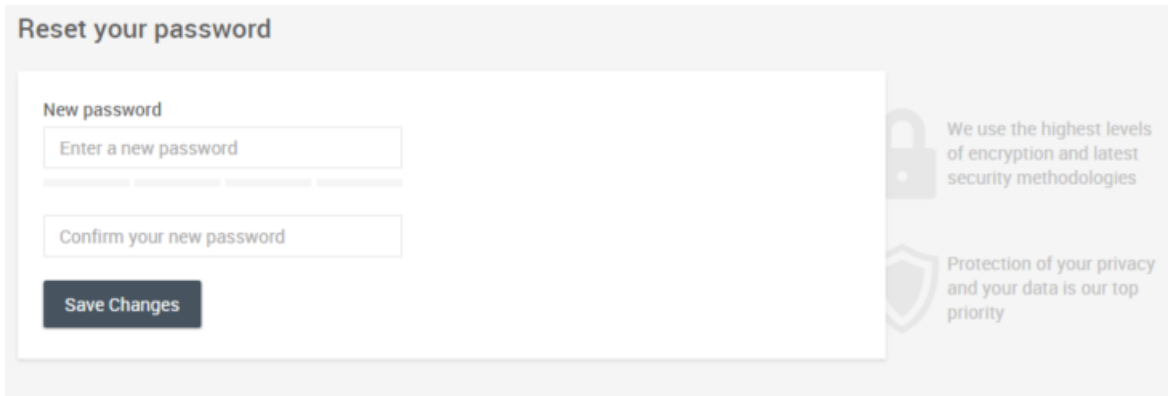
Check your email inbox for the email sent by the Portal.

Once you receive the email click the “Reset my password” link within it. You will be redirected to a secure web page on the virtualcabinetportal.com website.

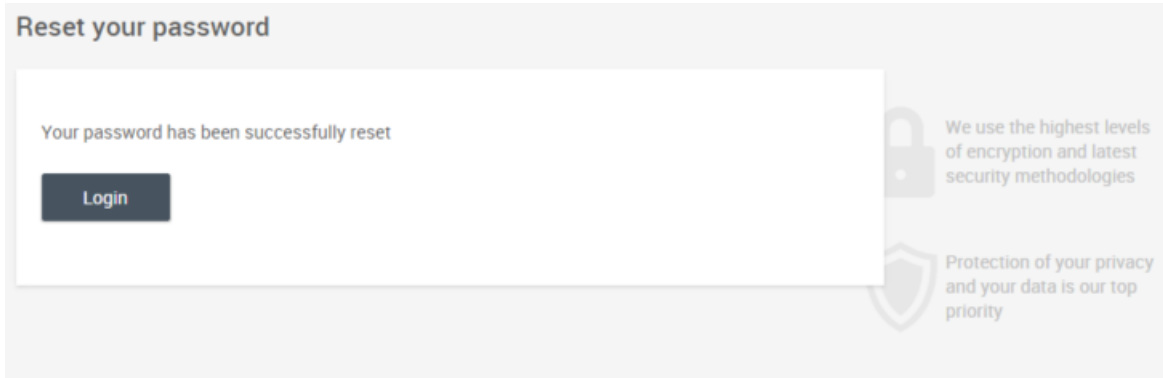


You will now be able to see the password reset page, allowing you to type in your new password for your Virtual Cabinet Portal account.

Ensure you follow the instructions, and click the “Save Changes” button once you are finished...



Once your password has been reset, please click the link titled “Login” button to open up the login page where you can log into Virtual Cabinet Portal with your new credentials.

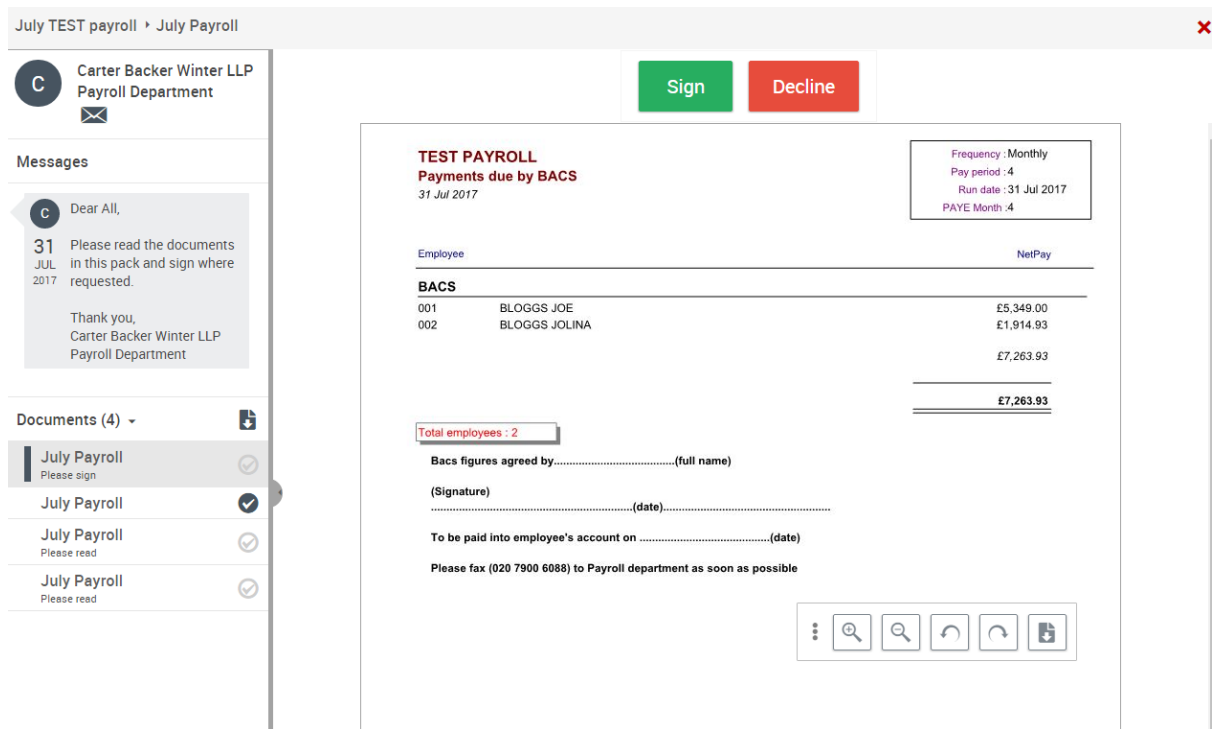


4 Authenticating your Device & Browser

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**.

Signing a document needs to be a highly secure process, so we need to be as sure as possible that your Portal Account has not been compromised.

When you are asked to sign a document, the email notification you receive will say so, and the Sign and Decline buttons will appear when you access the document in the Portal.



July TEST payroll ▸ July Payroll ✕

C Carter Backer Winter LLP
Payroll Department

Messages

C Dear All,
31 JUL 2017 Please read the documents in this pack and sign where requested.
Thank you,
Carter Backer Winter LLP
Payroll Department

Documents (4)

- July Payroll Please sign
- July Payroll ✓
- July Payroll Please read ✓
- July Payroll Please read ✓

TEST PAYROLL
Payments due by BACS
31 Jul 2017

Frequency : Monthly
Pay period : 4
Run date : 31 Jul 2017
PAYE Month : 4

Employee	NetPay
BACS	
001 BLOGGS JOE	£5,349.00
002 BLOGGS JOLINA	£1,914.93
	£7,263.93
	£7,263.93

Total employees : 2

Bacs figures agreed by.....(full name)

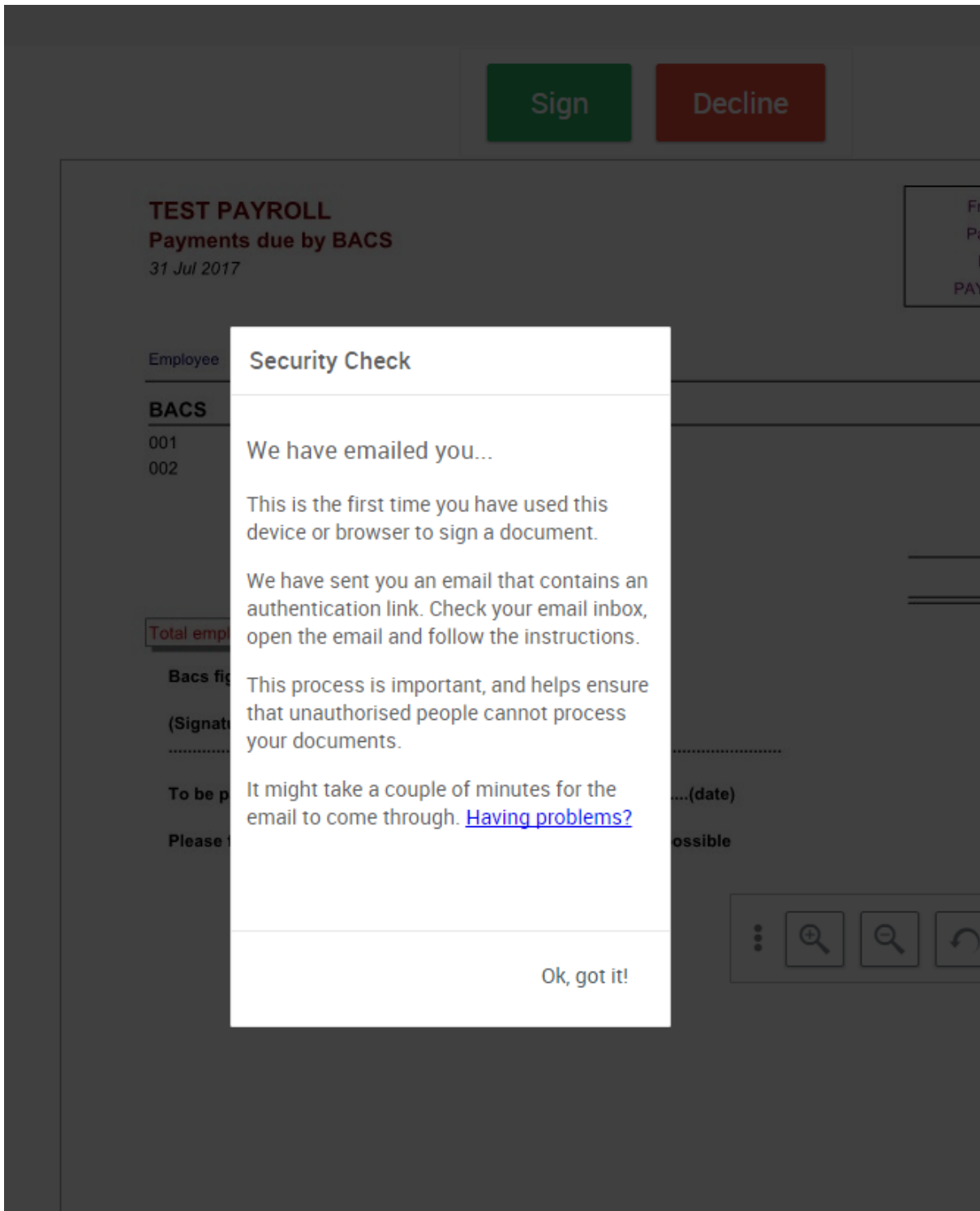
(Signature).....(date).....

To be paid into employee's account on(date)

Please fax (020 7900 6088) to Payroll department as soon as possible

⋮ 🔍 🔍 ↶ ↷ 📄

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.



When you open the authentication email, there will be a link that you need to click 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.



Dear Mr Wigchert,

The Portal is a secure document distribution and management system.

In order to process documents and action them (sign, reject etc.), each device and web browser you use must be authenticated.

You have been sent this e-mail because you have attempted to sign or reject a document on a new device for the first time.

Please open this e-mail using the device on which you are using the portal and click on the following link, or alternatively, copy and paste the link into the web browser's address bar:

https://www.virtualcabinetportal.com/link?url=%2fMyPortal%2fAuthenticate%2f13ae37d3-2ed0-41ef-9e1a-28689bed5935%3forg%3dcarterbackerwinterllpcb%26utm_source%3dVCP%26utm_medium%3dEmail%26utm_campaign%3dUsage%26utm_term%3dAuth

Please note that the link will be valid for the next five days, after which you will need to request another browser authentication e-mail.

Thank you

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.

The link will take you to a Virtual Cabinet webpage where you can specify if this device is for private use, or is a shared device. Select the appropriate option.

Device Privacy

This browser has been successfully authenticated, please select a privacy option.

This device is private

Authentication will remain for this browser in future

Or

This device is public

Authentication will expire when you close the browser or log out

We use the highest levels of encryption and latest security methodologies

Protection of your privacy and your data is our top priority

You will then be allowed to continue with the signing process. A pop-up will be presented asking if you would like to add a message to the document you are signing.

Feel free to create a message, and click the “Sign” button to sign and send the document...

The screenshot shows a web application interface with a dark grey background. At the top right, there are two buttons: a green 'Sign' button and a red 'Decline' button. The main content area is titled 'TEST PAYROLL' and includes a table with columns for 'Payroll', 'Employer', and 'BAC'. A white dialog box is overlaid on the page, containing the following sections:

- Signing Statement**: A text box containing the text: "By electronically signing this document, I acknowledge this is the equivalent of providing a written signature on a hardcopy document."
- Message**: A text box with the placeholder text: "Type an optional message that will form part of your electronic signature...".
- Your Signature**: A section titled "Your signature will contain:" with a list of three items, each preceded by a green checkmark:
 - information that identifies you
 - any message you have entered above
 - your current I.P. address (213.133.131.106)

At the bottom of the dialog box, there are two buttons: a dark blue 'Sign' button and a grey 'Cancel' button.

Once you have clicked this, you will receive a pop-up message stating that the document has been signed and returned...

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 speak to your usual CBW contact.