

## Client Experience: Upload Documents



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Edited 12/01/2023

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Your firm will provide a drop-off link you can use to securely upload and deliver documents to them. The document transfer is fully encrypted and safe to use.

### Please note:

The maximum amount of data that can be sent via a drop off link is 3GB.

1. Click the drop-off link provided by the firm.
  - This will typically appear in their email signature.
2. Enter your **Email** address.
3. Enter your **First Name**.
4. Enter your **Last Name**.
5. Click the **Remember Me** checkbox to have your email address and name auto-populate the next time you use a drop-off link.
6. Ensure the document is being sent to the correct **Recipient**.
  - Click the recipient field to select a different recipient.
7. Type a **Subject** for the message.
8. Type a **Body** for the message.



9. Click **Attach File(s)** to select the document(s) to upload.

10. Click **Send** to generate an access code.

The screenshot shows the 'SafeSend Exchange' interface for 'Hatfield & Associates'. On the left, the 'From' section includes fields for 'Email' (with callout 2), 'First Name' (with callout 3), and 'Last Name' (with callout 4), along with a 'Remember Me' checkbox (with callout 5). On the right, the 'To' section has a recipient field (with callout 6) and a 'Subject' field (with callout 7). Below these is a rich text editor (with callout 8) and an 'Attach File(s)' button (with callout 9). A 'Send' button (with callout 10) is located at the bottom right.

11. Enter the access code sent to your email address.

12. Click **Authenticate** to send the document(s) to the firm.

The screenshot shows the 'SafeSend Exchange' interface with a modal dialog box titled 'Enter the Access Code'. The dialog features a shield icon with a checkmark and text: 'Please enter the One-Time Access Code sent to your email address alyse.hooper@safesend.com'. A red warning states 'Code will expire in 20 minutes.' Below this is a numeric input field (with callout 1) containing the code '99843381'. An 'Authenticate' button (with callout 2) is positioned below the code field. At the bottom of the dialog, there is a note: 'If you did not receive it yet, please check your junk/spam folder.' and a 'Resend code' link. The background shows the email form with the 'Email' field filled with 'alyse.hooper@safesend.com' and the 'Last Name' field filled with 'Hooper'. The 'Send' button is visible in the bottom right corner.

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