

1. Introduction

The Johnston Associates Virtual Cabinet® Document Portal is a cloud-based document portal with a difference. Fully integrated with our Virtual Cabinet® Document Management System, the Virtual Cabinet® Document Portal allows us to publish and send documents to clients in a simple, secure and audited manner. The Virtual Cabinet® Document Portal delivers an easy to use, comprehensive and elegant mechanism by which we can significantly improve customer service and retain far greater control and visibility over the life-cycle of the documents. This document is a simple guide to accessing, viewing and signing documents sent via the Portal.

This document is intended to assist those who have been sent documents or information via the Portal.

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 document, 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”**:

Hi Someone,

Someone Somewhere from **Reckon Software** has sent you a secure document that requires your signature.

This email has been sent to **someone@recon-software.com**, which is the address you should use when logging into the Virtual Cabinet® Portal. Please do not reply to this email. This mailbox is not monitored and you will not receive a response.

Virtual Cabinet is a secure and audited document distribution and management system used by Reckon Software 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

Someone Somewhere from **Reckon Software**

After clicking the link, you will be directed to a secure **Activate your account** page on the Virtual Cabinet Portal 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

Password
 Great ✓

✓

Next [Portal information](#)

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
 ✓

First name

Last name
 ✓

Country

Telephone number
 ✓

Mobile number
 ✓

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:

<https://www.virtualcabinetportal.com/MyPortal/Login?org=johnstonassociatessouth>

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.

3. Forgotten Password

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?org=johnstonassociatessouth>

And click the “**Having problems?**” link.

Once you have clicked the link, you will be presented with a page asking for your email address so that the VirtualCabinet 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.

E-mail address

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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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.

Dear Mr Somewhere,

A password reset request has been received for your Virtual Cabinet® Portal Account. Please click the link below to reset your password.

[Reset my password](#)

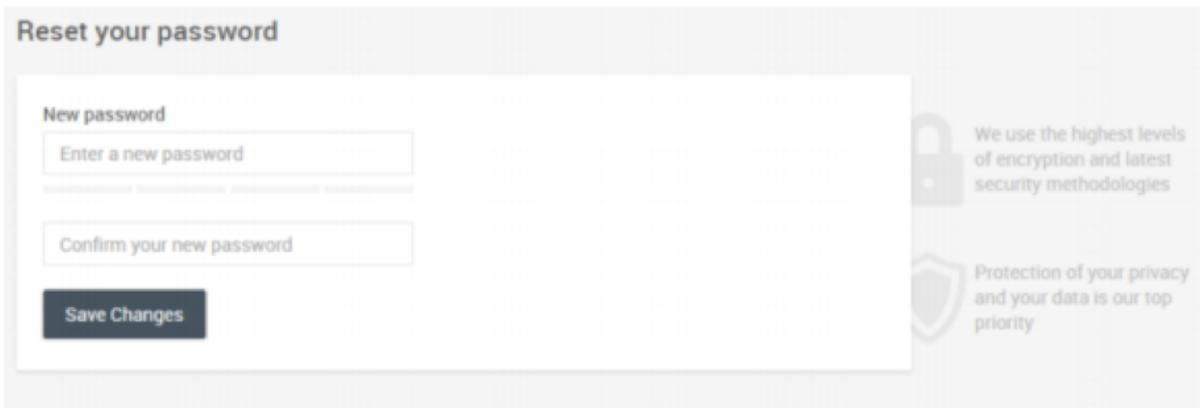
This email has been sent to [redacted] which is the address you should use when logging into the Virtual Cabinet® Portal. Please do not reply to this email. This mailbox is not monitored and you will not receive a response.

Thank you

The Virtual Cabinet® Portal Team

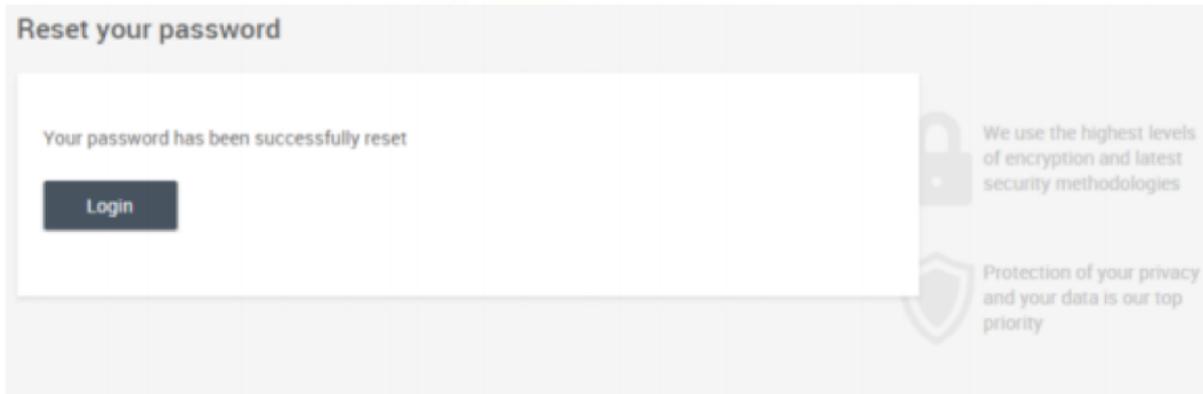
You will now be able to see the password reset page, allowing you to type in your new password for your Virtual Cabinet Portal account.

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



The screenshot shows a web form titled "Reset your password". It contains two input fields: "New password" with the placeholder text "Enter a new password" and "Confirm your new password". Below these fields is a dark button labeled "Save Changes". To the right of the form, there are two security-related messages: "We use the highest levels of encryption and latest security methodologies" (accompanied by a padlock icon) and "Protection of your privacy and your data is our top priority" (accompanied by a shield icon).

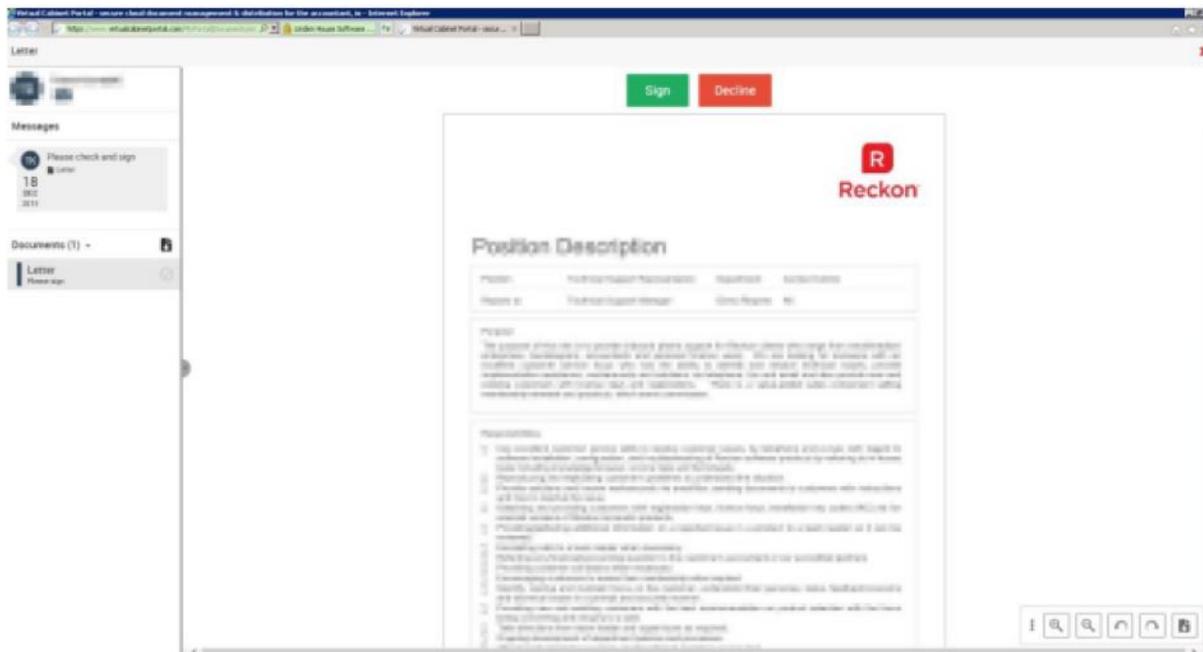
Once your password has been reset, please click the link titled **“Login”** button to open up the login page where you can log into Virtual Cabinet Portal with your new credentials:



4. Document Signing

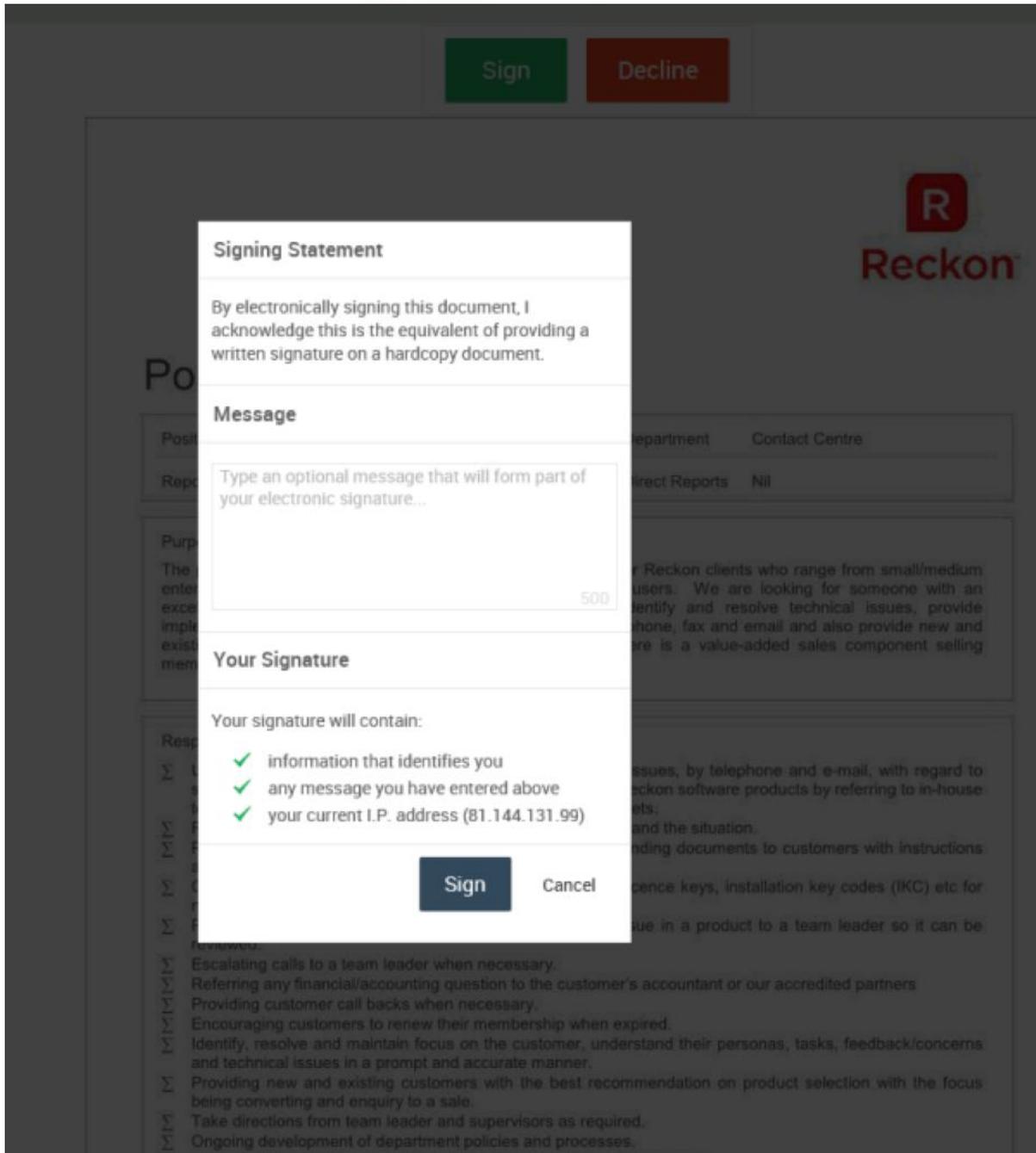
After clicking the link in the notification email you'll receive - and signing in -you will see the document.

An example document is shown below:



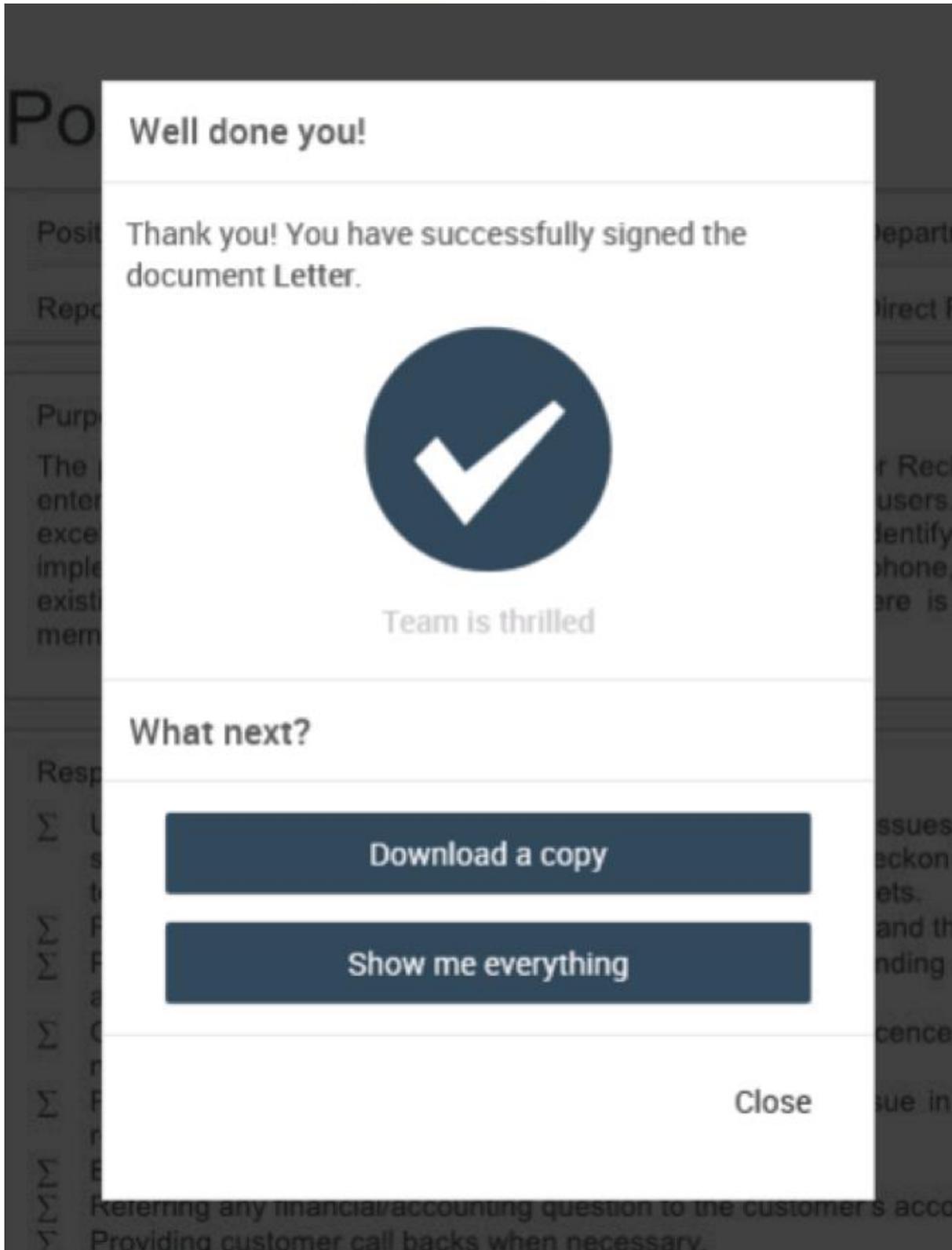
To sign the document simply click the **sign button** at the top of the document.

This will show a screen giving information about the signature and, if permitted by the publishing company, an area to add an optional message:



Click **Sign** to confirm the signature.

At this point you can download a copy of the document to your own machine if you wish.

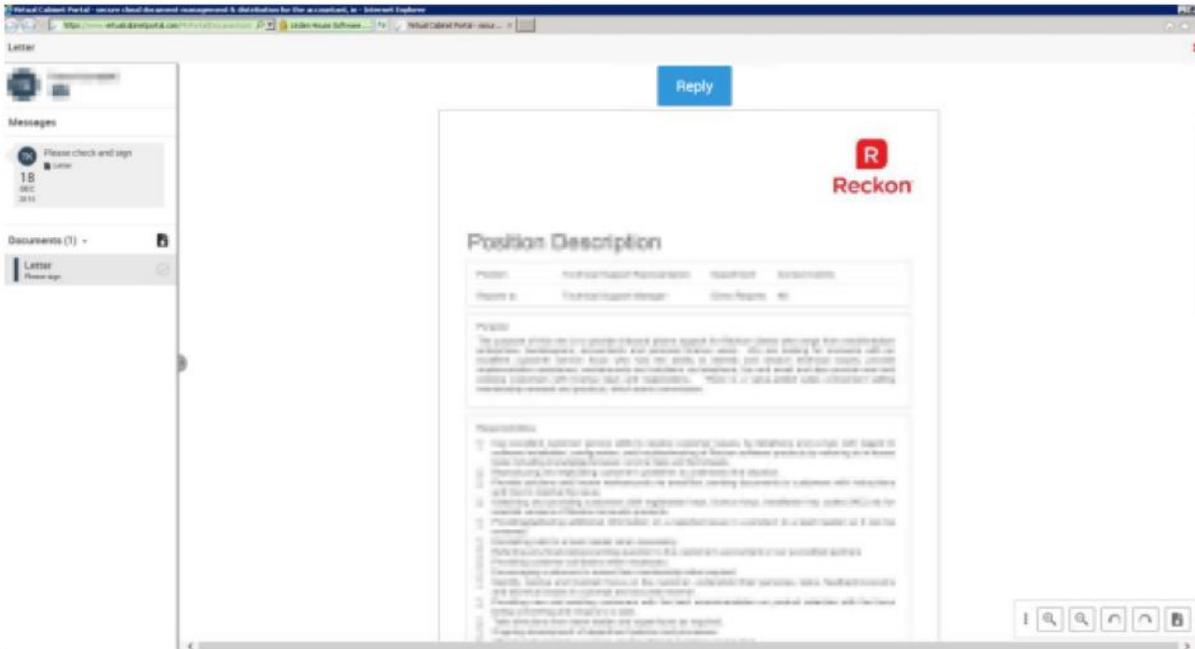


5. Sending Documents

Once you have an account with the portal you may have the ability to send documents either in the form of a request, or at will via your portal main page (after logging in).

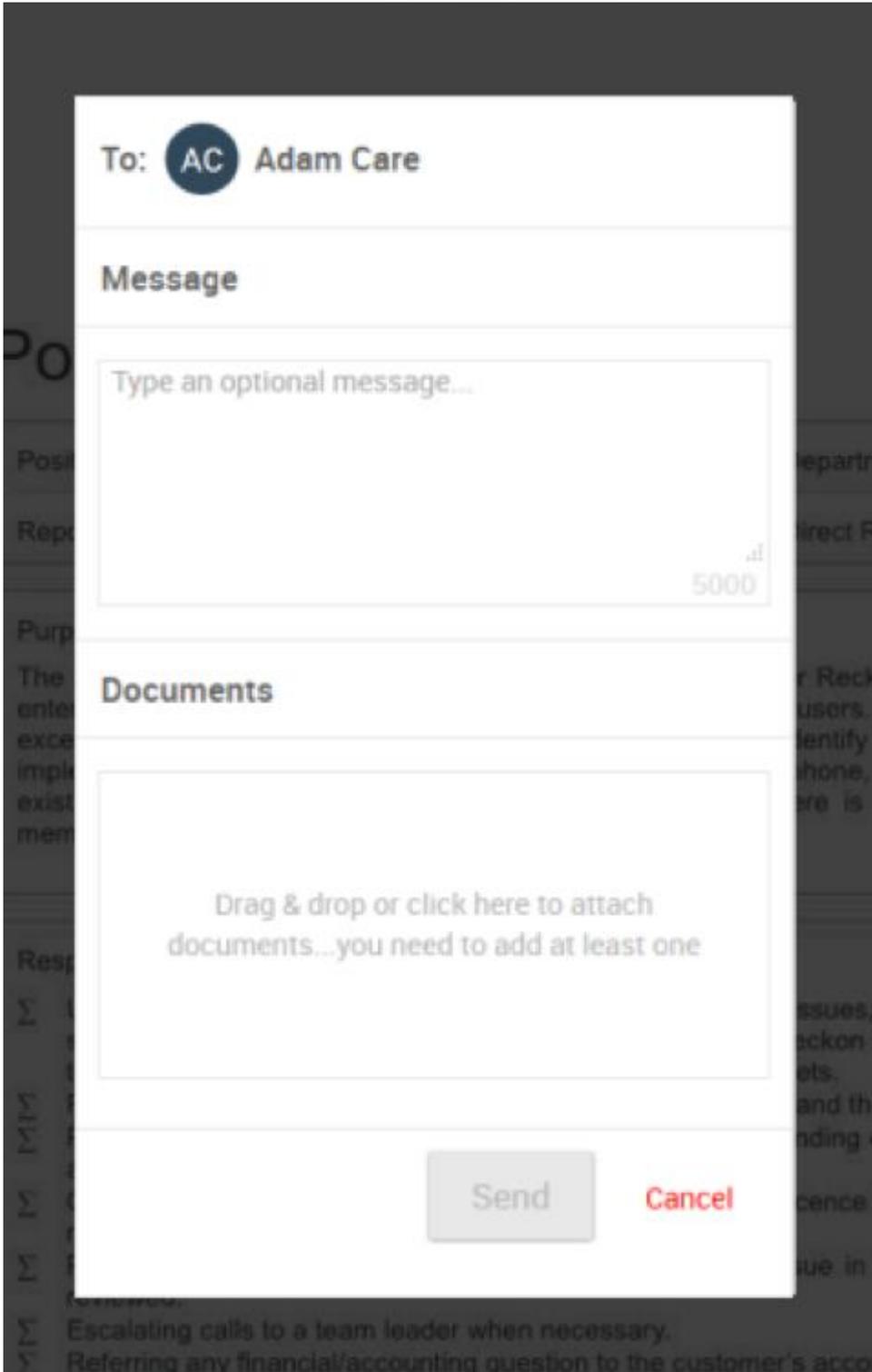
If it is in the form of a request you will see something similar to the document signing screen.

However, in place of the sign and reject buttons you will see the **reply** button:



To reply to the document simply click the **reply** button at the top of the document.

This will show a screen giving allowing you to choose a document from your computer and, if permitted by the publishing company, an area to add an optional message:



To:  Adam Care

Message

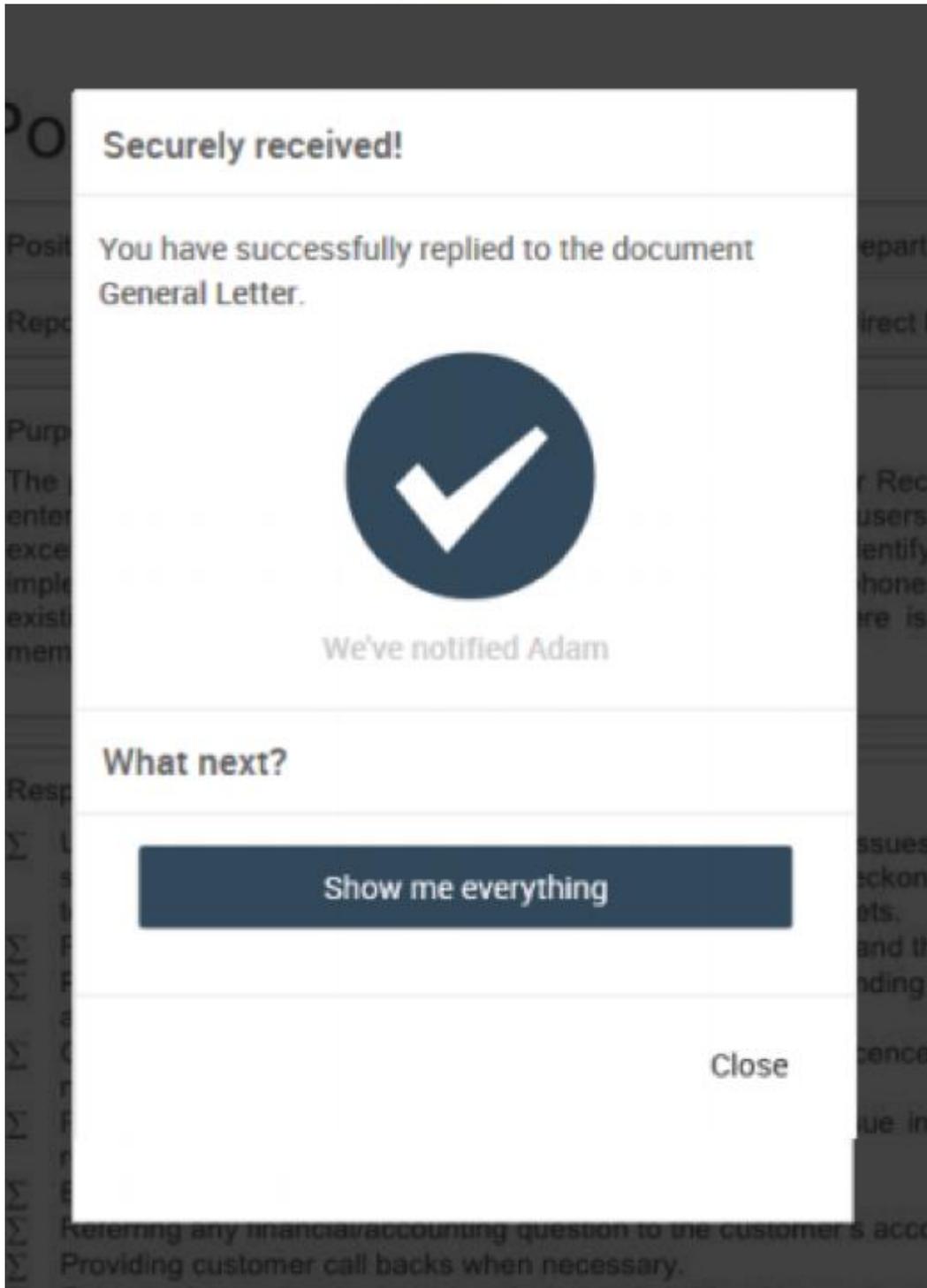
Type an optional message... 5000

Documents

Drag & drop or click here to attach documents...you need to add at least one

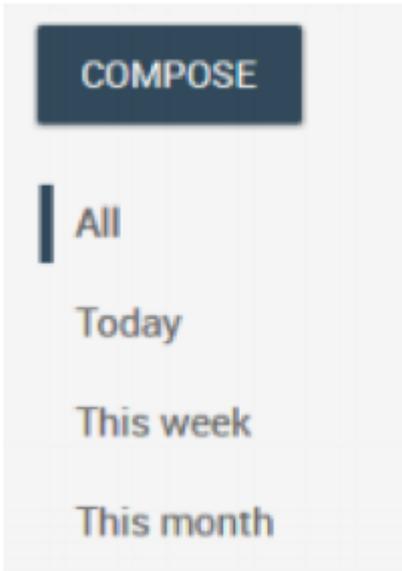
You can select 5 documents at a time and up to 100MB per document. Once you have added your documents click **send**.

You will then be presented with the following confirmation:



You can also send a document at any time via the portal main page.

This is located under the **COMPOSE** box:



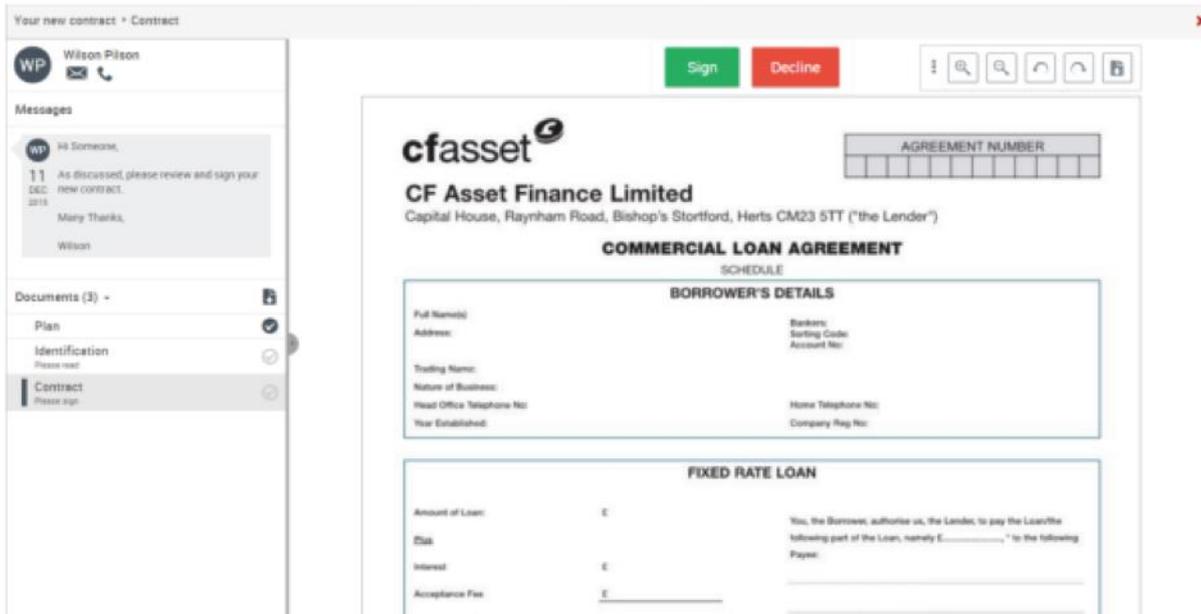
6. Authenticating your Device & Browser

This process will only need to be followed if you need to perform a task on a document, such as digitally sign it.

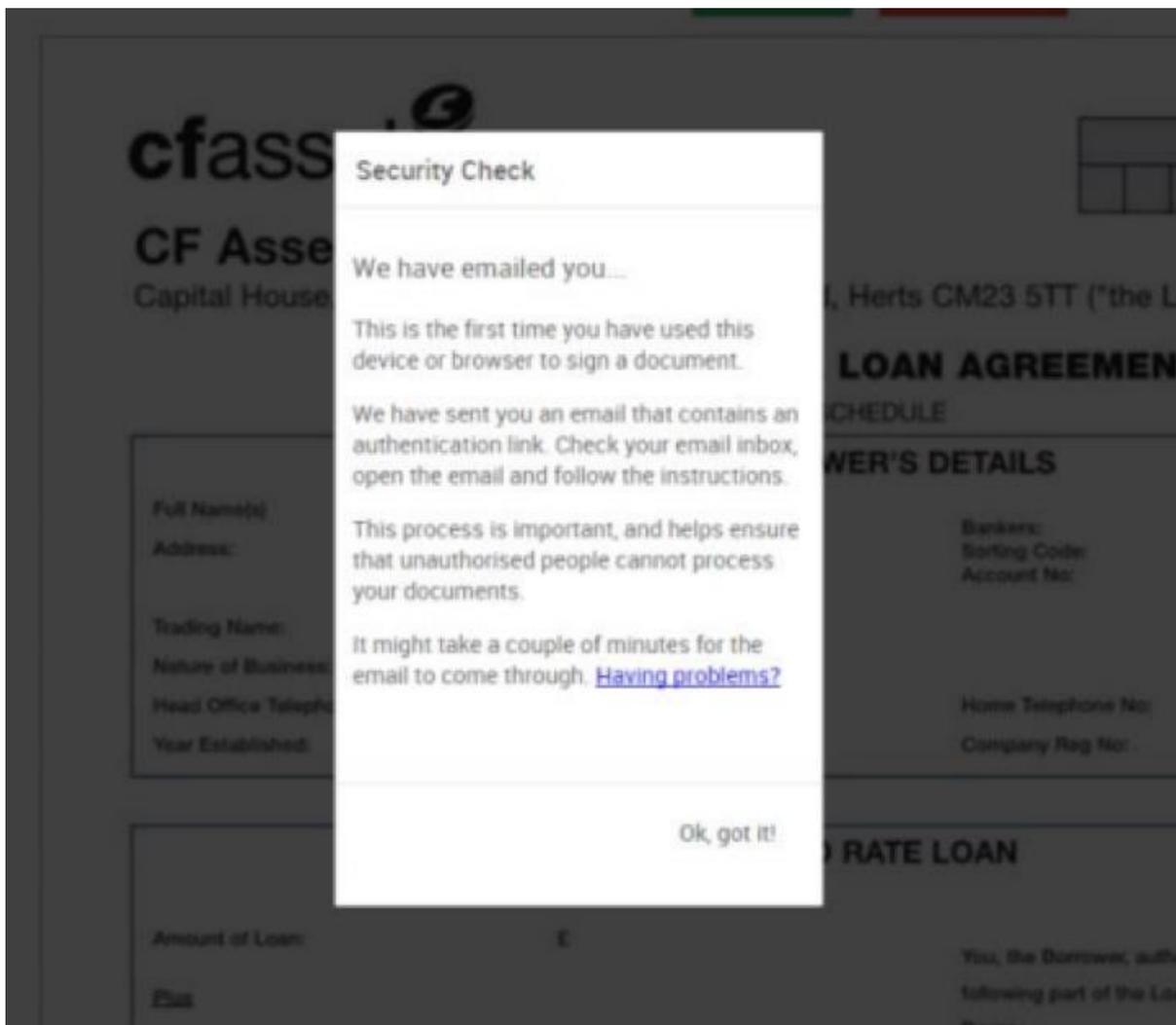
It will only be triggered if you are trying to perform such a task for the **first time** on a **new device** or using a **new internet browser**.

Signing a document needs to be a highly secure process, so we need to be assured 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.

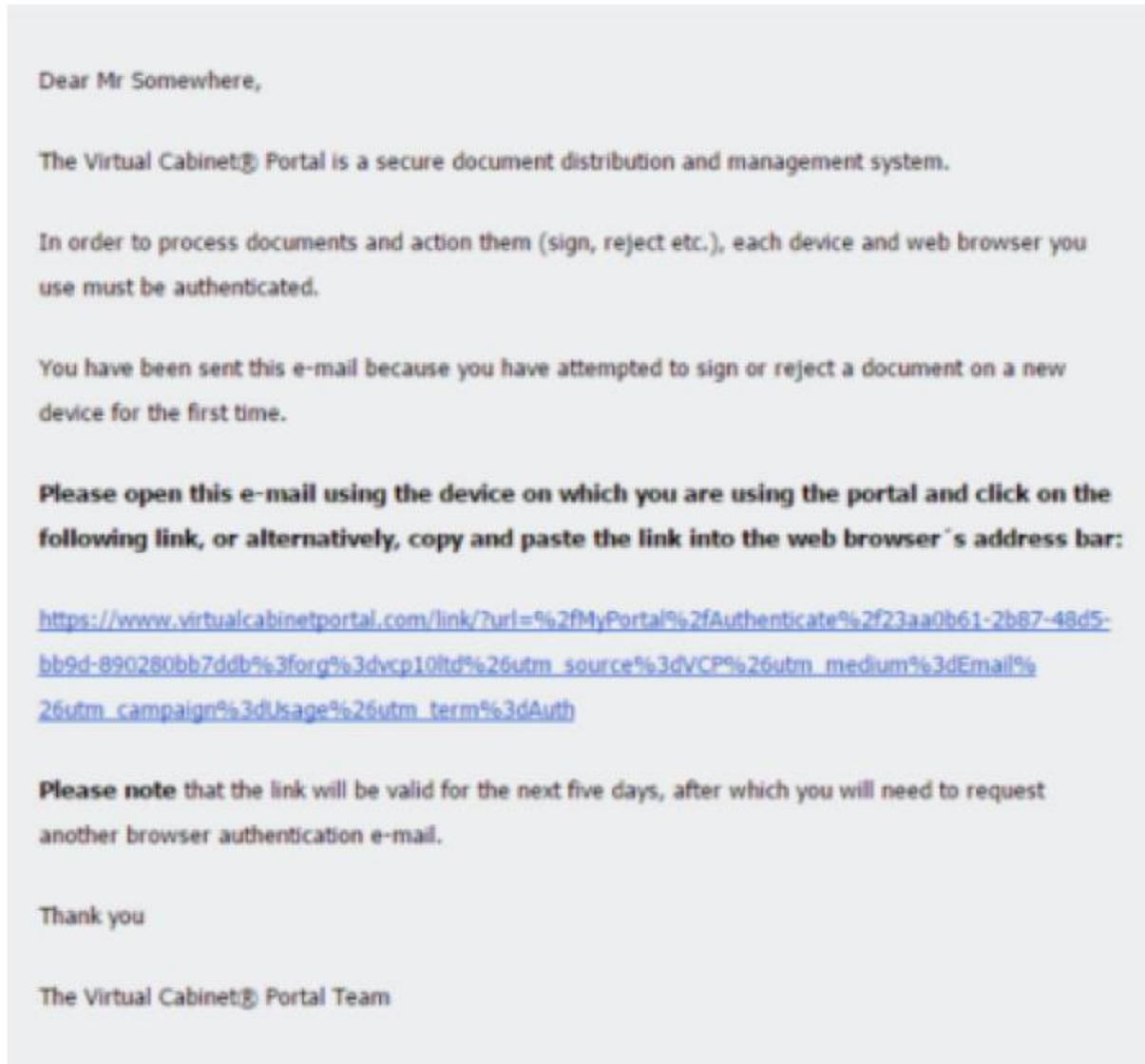


When clicking the **Sign** button, you will be presented with a pop-up notification stating that you need to authenticate your device or browser and that you have **already been sent** and authentication email.



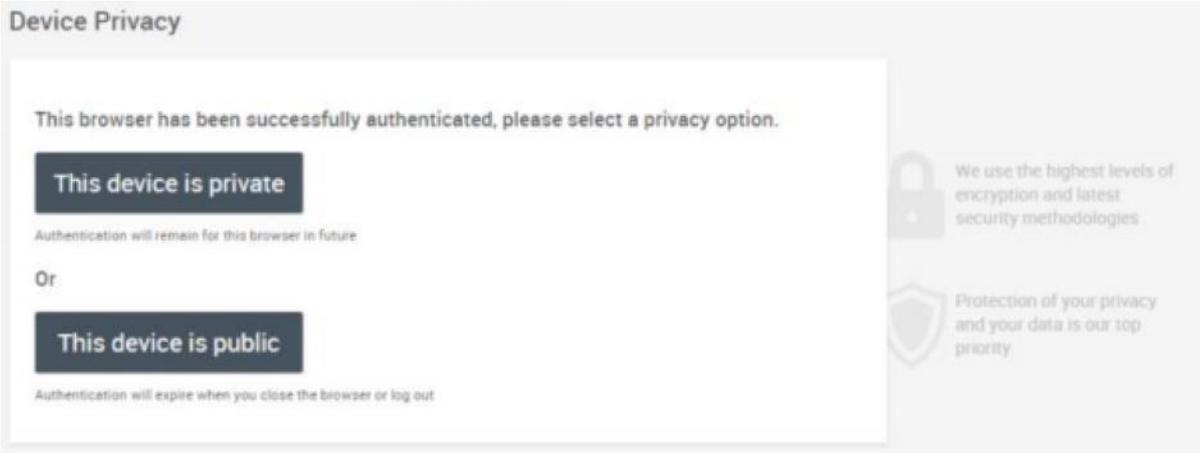
When you open the authentication email, there will be a link that you need to click to enable the current device for signature approval.

Make sure you click or use this link on the same device and browser that you are using to sign the document.



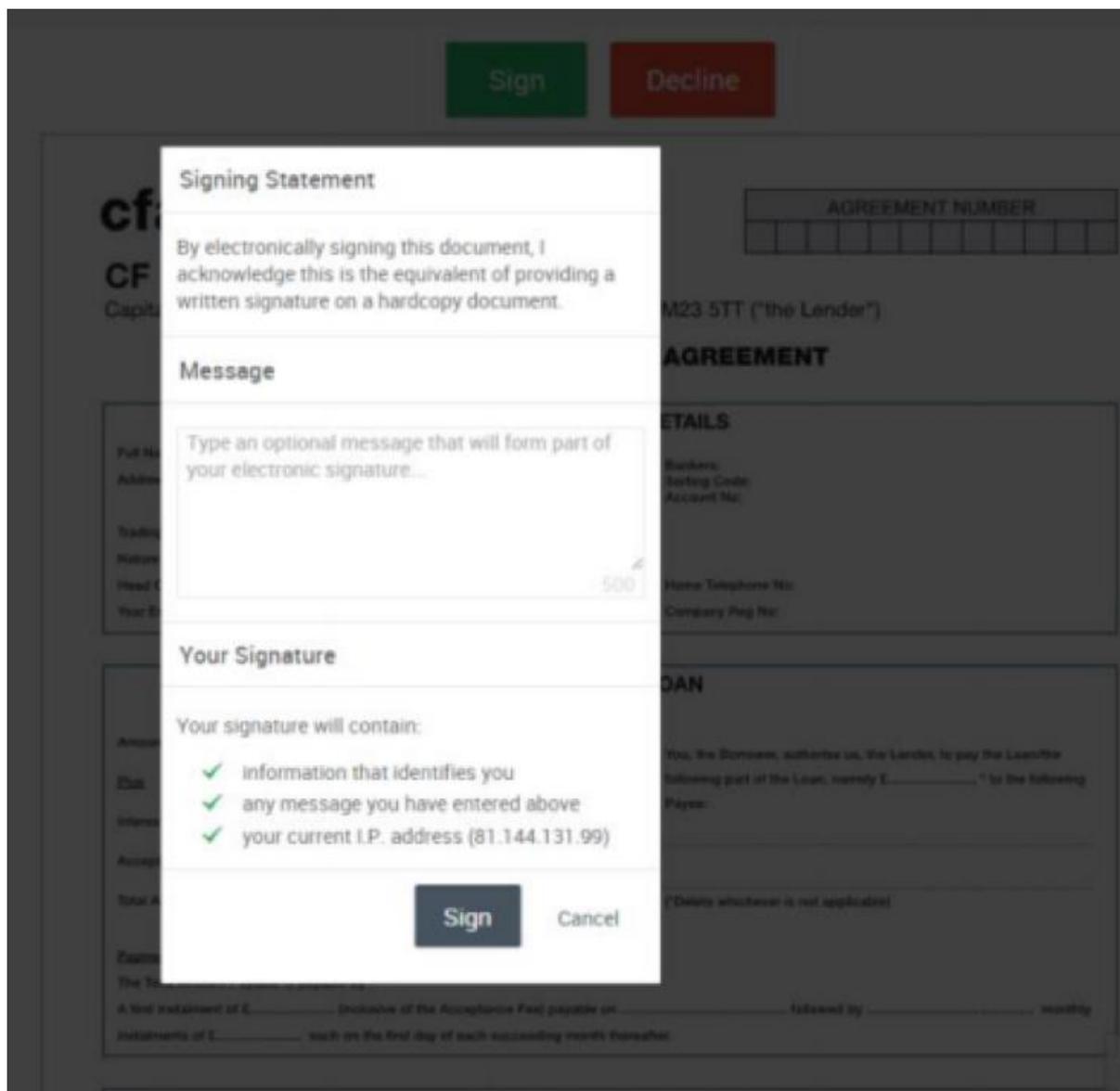
The link will take you to a Virtual Cabinet webpage where you can specify if this device is for private use, or is a shared device.

Select the appropriate option.



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:



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

7. 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 contact your accountant at Johnston Associates.