

Using the DSM Secure Web Portal

DSM CA LTD have set up an online secure share platform for you and your company.

When you follow the link within the welcome email, it will request to input a password. Please use a secure password with a mixture of capitals, lower case, numbers or symbols.

Please note that initially no folders will show when you login.

Once your account has been created, we will assign relevant company and personal tax folders for you to see.

The folders in the portal represent an area that you will store your data for DSM. For example, Business Clients will have 'Accounts, Corporation Tax, Correspondence and Invoices'. You may also have a portal for Personal Tax, VAT, Payroll Information.

We will populate the folders with information, i.e. adding in your tax return. You will receive a notification by email that we have added files. From our side we will log in and collect any files you have added. This is a secure way of working online and is an easy way to share documents with us through the web.

Please contact our office team by telephone if you are having any issues, or by email on office@dsmaccountants.co.uk

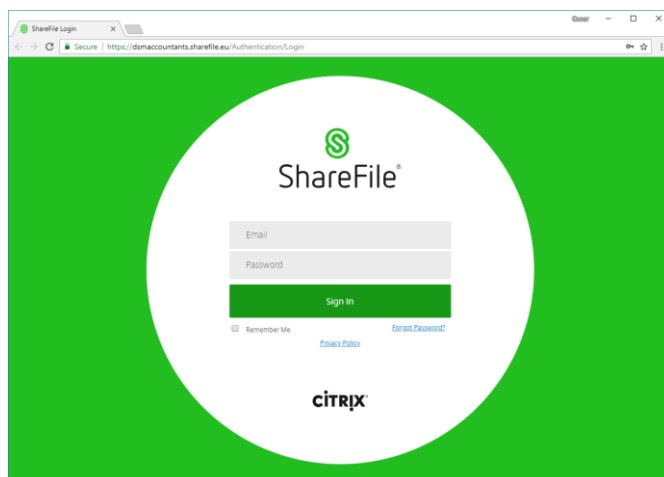
Your client manager will also be able to help as time goes by. We have set this up for compliance with GDPR, and progression towards a more digital workplace. If you are having any difficulties at all please feel free to get in touch, we will help in whatever way we can.

Guidance on using the system

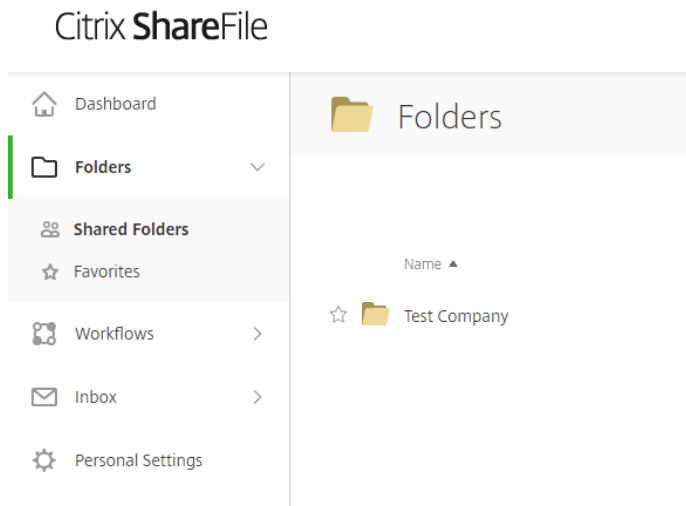
1. Click on the Secure Portal button on the DSM Website menu

Secure Portal

2. You will reach the DSM ShareFile homepage



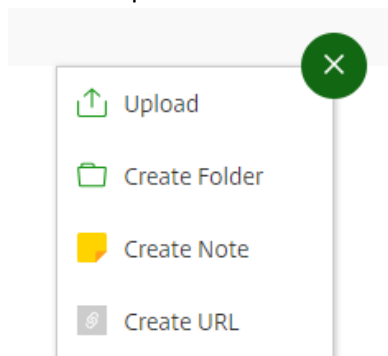
3. Enter your user details and click Sign in
4. The ShareFile dashboard will show with your related folders listed. You can return to your top-level folder by clicking Folders > Shared Folders on the left-hand menu



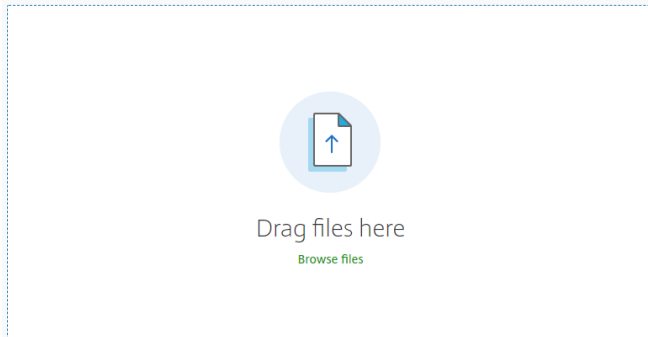
5. On the right-hand side, you can action files and folders by hovering over the green plus icon



6. Various options are shown, including upload, and create folder. To add files into the portal, choose "Upload"

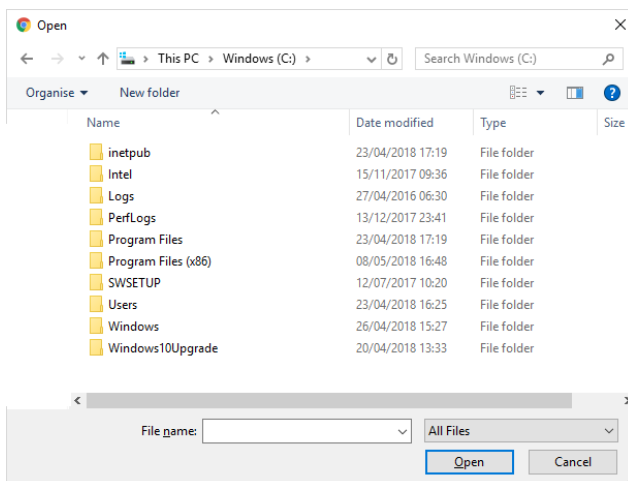


7. You can add files in by “drag and drop”, or simply choosing **Browse Files**. The drag and drop feature allows you to left click and hold files stored on your computer, then drag them into ShareFile. This is a useful feature for sharing entire folders, as you cannot upload a whole folder using the browse option.

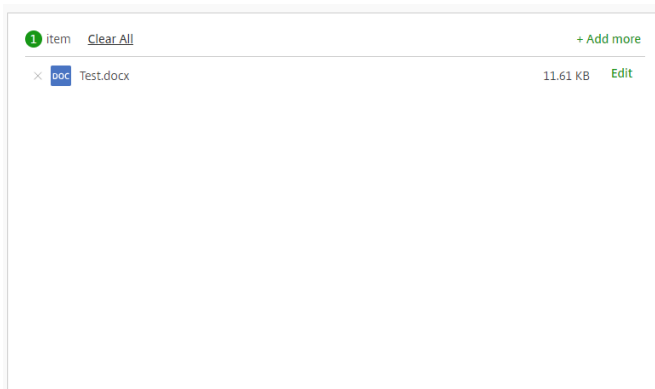


If preferred, you can choose **Browse files**, which will give you a conventional explorer window.

When using **Browse files**, navigate to the required file stored on your computer, and click open. Multiple files within the same folder can be uploaded by clicking whilst holding control on the keyboard.



8. A list will accumulate for the files you have selected to upload.



9. Once you are happy with the file list, click the green upload button in the bottom left corner to add the files into ShareFile.



Troubleshooting

If you have any difficulties with account access, or queries relating to the system, please contact office@dsmaccountants.co.uk