



Portal Recipient Guide

For Virtual Cabinet

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2 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.

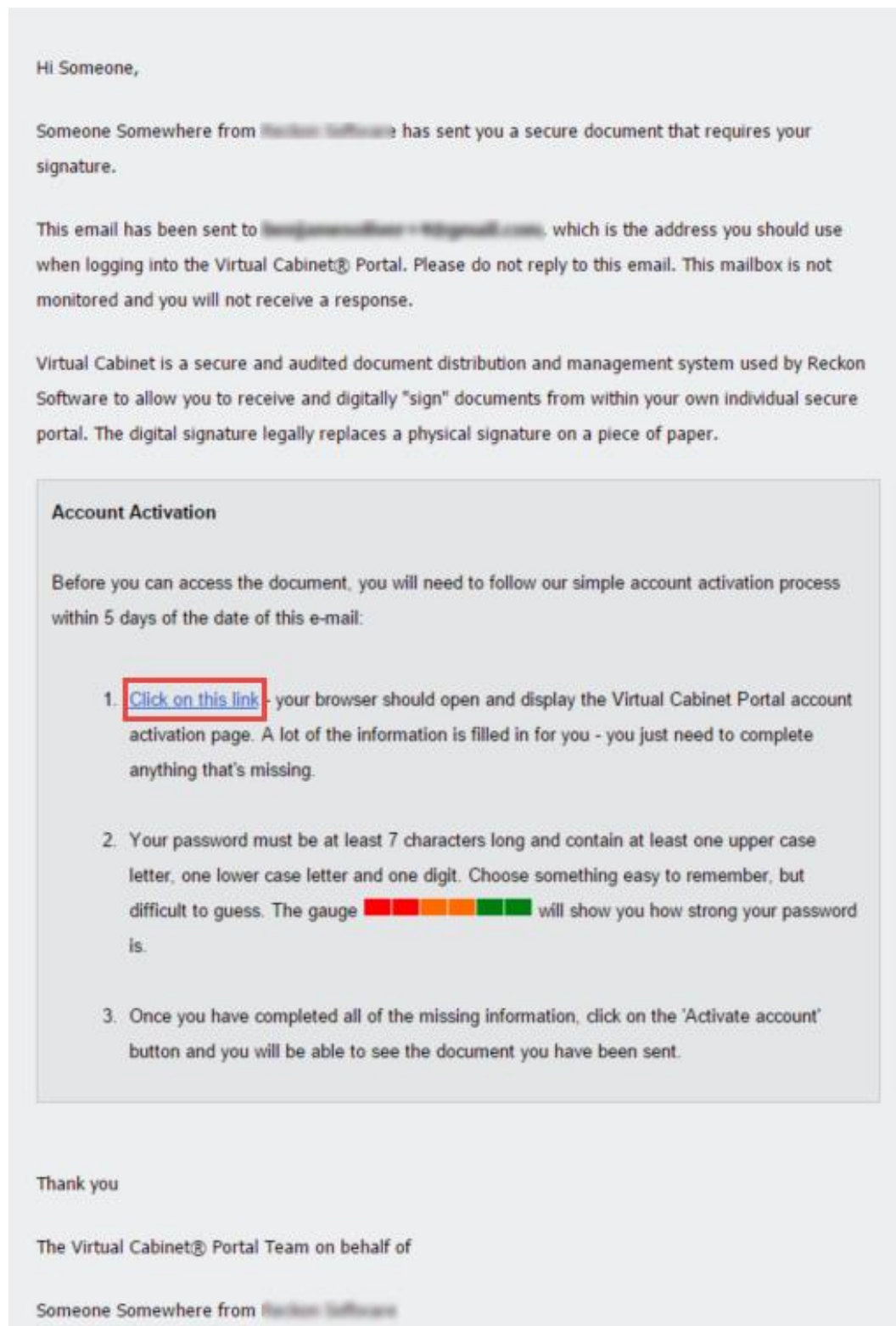
This document is intended to assist those who have been sent documents or information via the Portal, also known as Recipients.

3 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"...

3 - Account Activation



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

3 - Account Activation

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

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

LOGIN DETAILS

PERSONAL DETAILS

Almost done...

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

3 - Account Activation

Please complete the activation process as instructed.

Once you have completed this, please click "Activate account"...

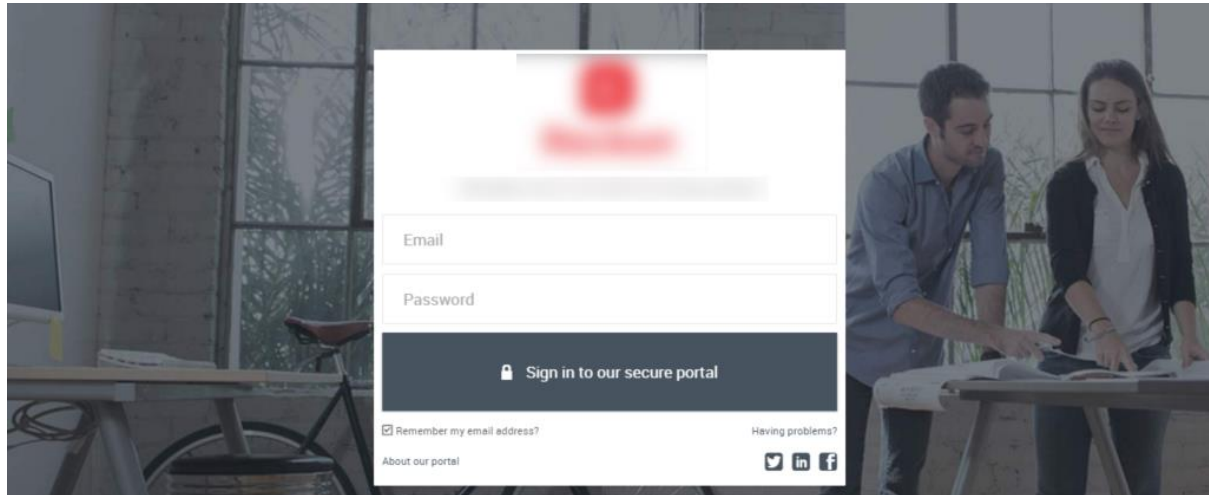
Once you have clicked "Activate account", you will be presented with the document, or pack of documents that was published to you.

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>

3 - Account Activation

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...

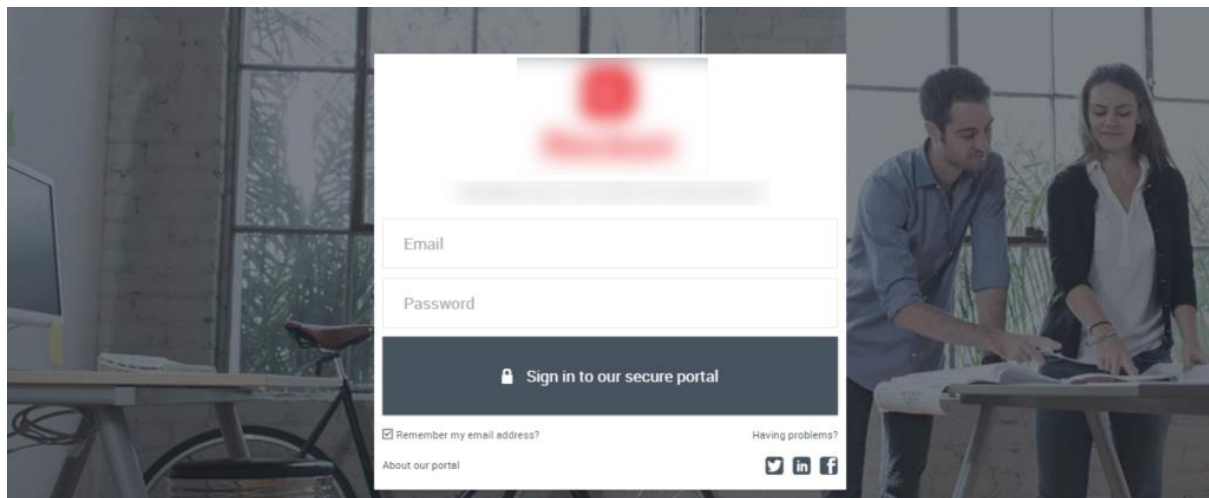


4 Forgotten Password

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...



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

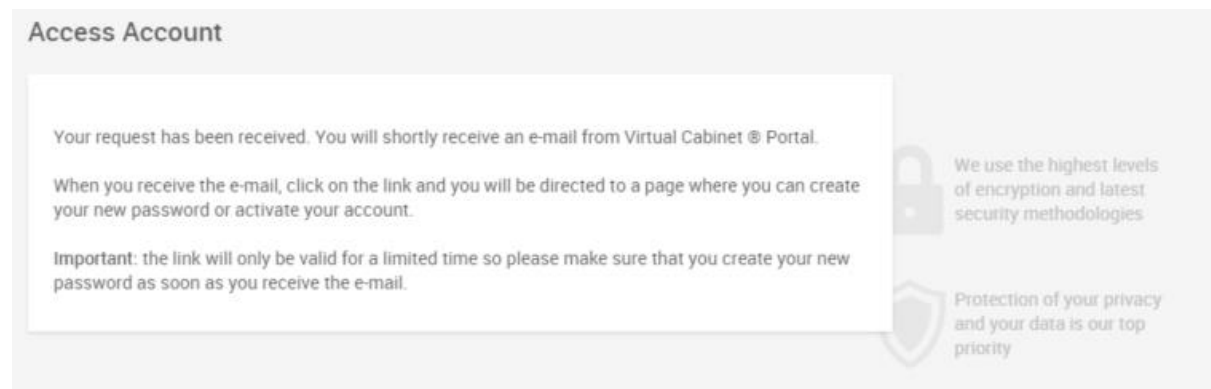
Has your e-mail changed? If you no longer use the e-mail associated with your Virtual Cabinet ® Portal account, you may [contact](#) Customer Service for help with restoring access to your account.

We use the highest levels of encryption and latest security methodologies

Protection of your privacy and your data is our top priority

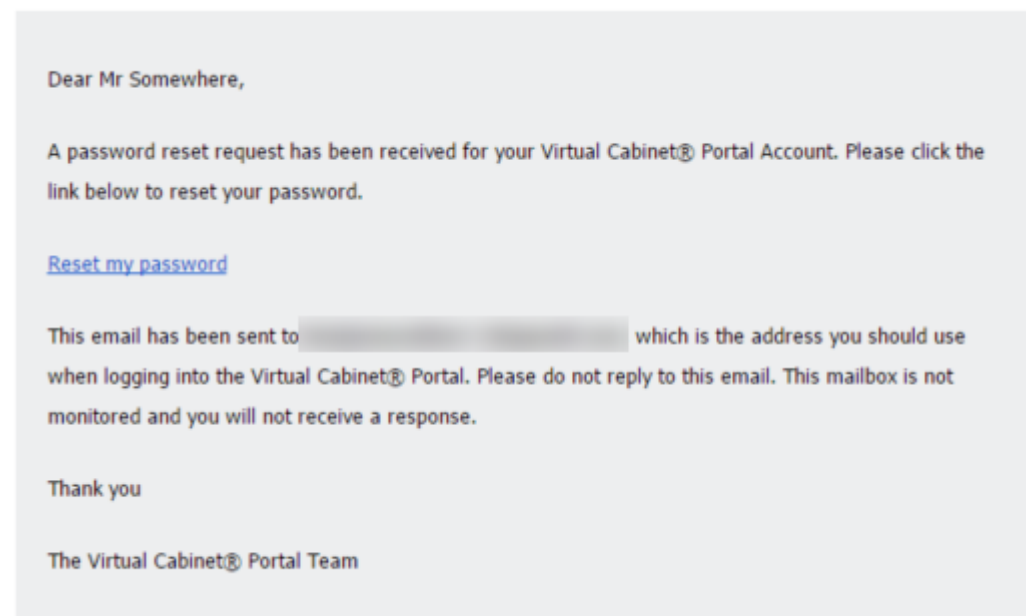
4 - Forgotten Password

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...



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

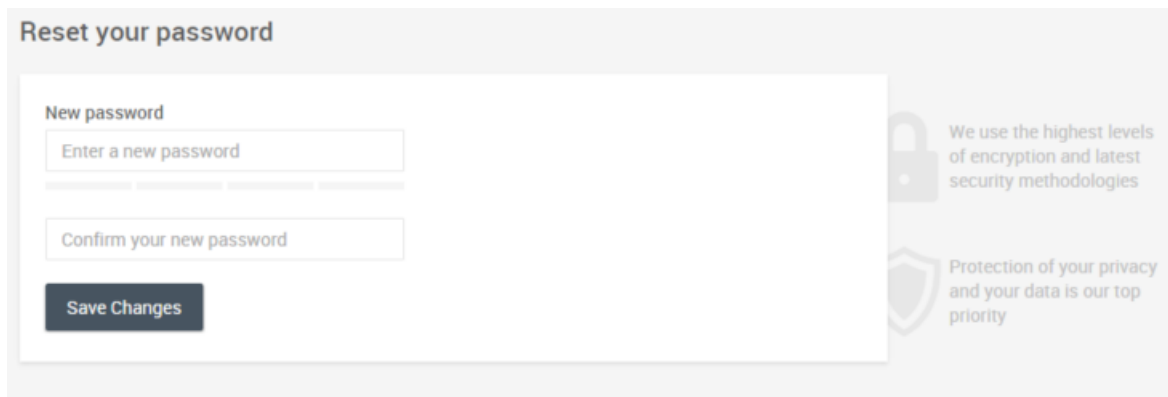
Once you receive the email click the "Reset my password" link within it. You will be redirected to a secure web page on the virtualcabinetportal.com website.



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.

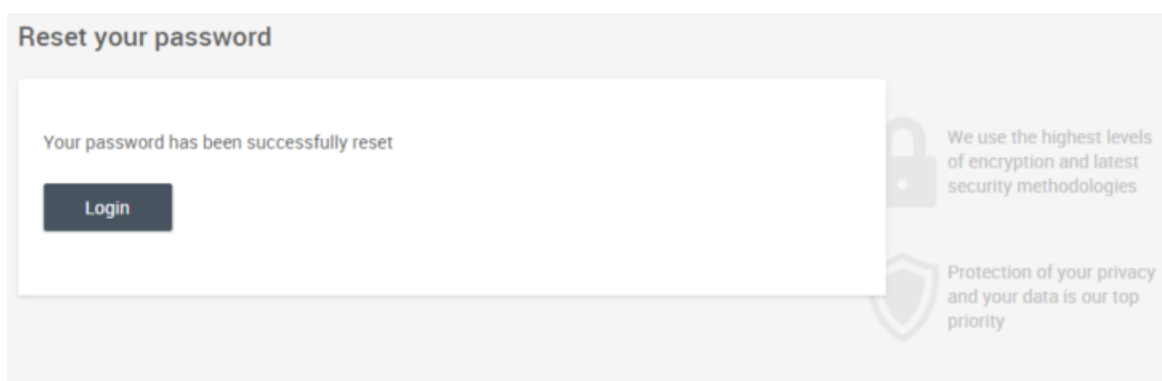
4 - Forgotten Password

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". Inside the form, there is a section labeled "New password" containing two input fields: "Enter a new password" and "Confirm your new password". Below these fields is a dark blue button labeled "Save Changes". To the right of the form, there are two security-related messages, each accompanied by a lock icon: "We use the highest levels of encryption and latest security methodologies" and "Protection of your privacy and your data is our top priority".

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...



This screenshot shows the same "Reset your password" form, but now it displays a success message: "Your password has been successfully reset". Below this message is a dark blue button labeled "Login". The security-related messages and icons on the right side of the form remain the same as in the previous screenshot.

5 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**.

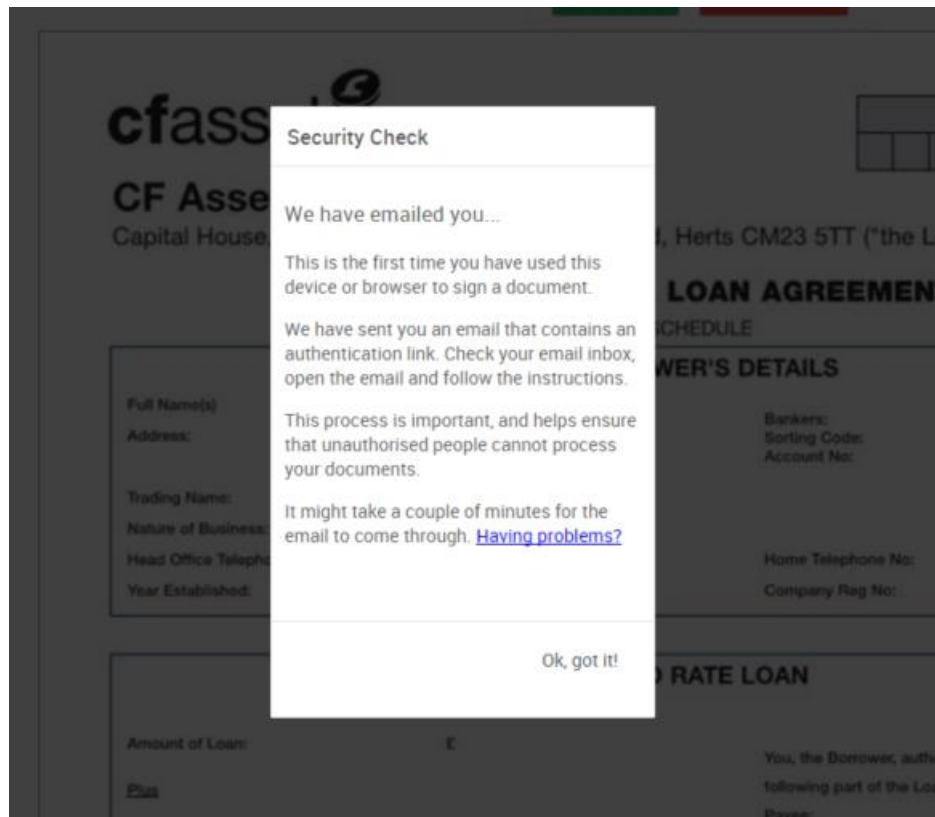
Signing a document needs to be a highly secure process, so we need to be as sure as possible that your Portal Account has not been compromised.

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.

The screenshot displays a web portal interface. On the left, a sidebar shows a user profile for 'Wilson Pilson' with a 'WP' icon, followed by a 'Messages' section containing a notification dated '11 DEC 2015' about a new contract. Below this is a 'Documents (3)' section with items 'Plan', 'Identification', and 'Contract'. The 'Contract' item is highlighted and marked with a checkmark. The main content area is titled 'Your new contract > Contract' and features a 'Sign' button (green) and a 'Decline' button (red). Below these buttons is a document titled 'COMMERCIAL LOAN AGREEMENT' from 'CF Asset Finance Limited'. The document includes a 'SCHEDULE' section with 'BORROWER'S DETAILS' and a 'FIXED RATE LOAN' section. The 'BORROWER'S DETAILS' section contains fields for Full Name(s), Address, Trading Name, Nature of Business, Head Office Telephone No, Year Established, Bankers, Sorting Code, Account No, Home Telephone No, and Company Reg No. The 'FIXED RATE LOAN' section contains fields for Amount of Loan, Plus, Interest, and Acceptance Fee, along with a text area for the loan agreement.

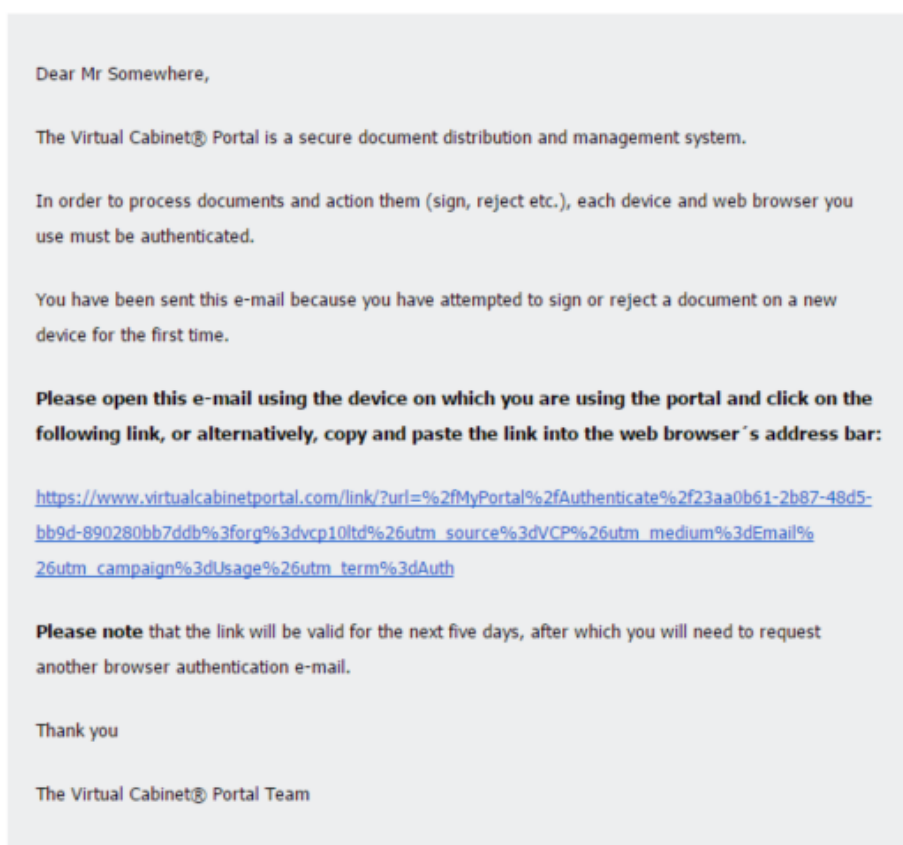
When clicking the Sign button, you will be presented with a pop-up notification stating that you need to authenticate your device or browser and that you have **already been sent** and authentication email.

5 - Authenticating your Device & Browser

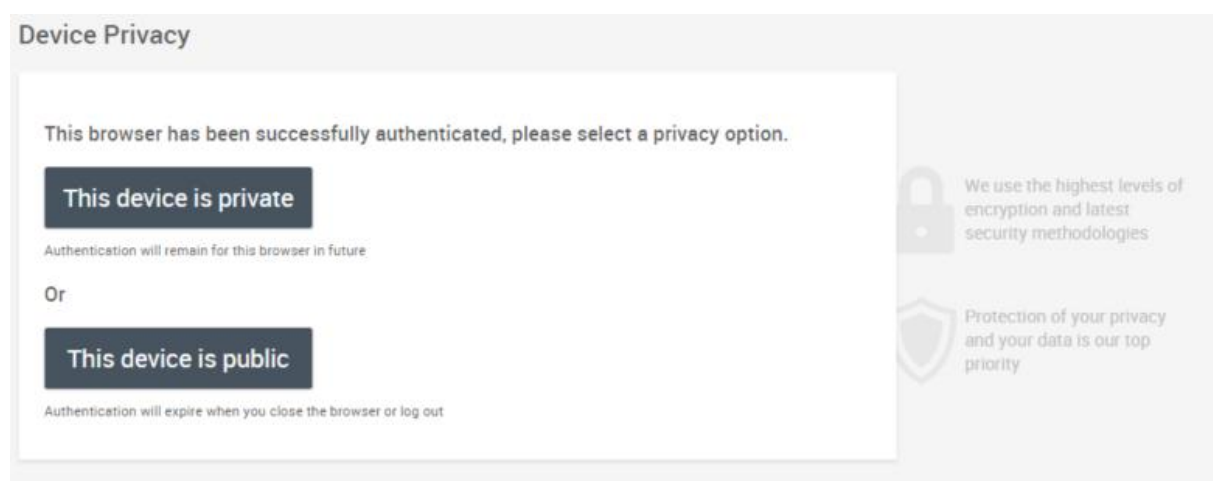


When you open the authentication email, there will be a link that you need to click to enable the current device for signature approval...make sure you click or use this link on the same device and browser that you are using to sign the document.

5 - Authenticating your Device & Browser



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.

5 - Authenticating your Device & Browser

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, there are two buttons: a green 'Sign' button and a red 'Decline' button. Below these, a white pop-up dialog titled 'Signing Statement' is centered. The dialog contains the following sections:

- Signing Statement**: A text box with 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...". A character count '500' is visible at the bottom right of the box.
- Your Signature**: A section titled "Your signature will contain:" followed by 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 (81.144.131.99)
- At the bottom of the dialog are two buttons: a dark blue 'Sign' button and a grey 'Cancel' button.

The background form is partially visible and includes the following elements:

- Logo: 'cf' and 'CF Capital'.
- Form fields: 'Full Name', 'Address', 'Trading', 'Nature', 'Head Office', 'Your Email'.
- Section: 'AGREEMENT' with a table for 'AGREEMENT NUMBER'.
- Section: 'DETAILS' with fields for 'Banker', 'Banking Code', 'Account No.', 'Home Telephone No.', and 'Company Reg No.'.
- Section: 'LOAN' with text: "You, the Borrower, authorize us, the Lender, to pay the Loan/the following part of the Loan, namely £....., to the following Payee:.....".
- Section: 'IMPORTANT - USE OF YOUR INFORMATION' at the bottom.

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

6 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 the company that you have received the document from.