



DOCUMENT PORTAL



## Quick User Guide

Your quick and simple reference. Learn how to use the Davis Grant Document Portal to securely view, approve and send files.

**LOGIN**

**VIEW**

**APPROVE**

**SEND**

You should have received an invitation by email from [portal@davisgrant.co.uk](mailto:portal@davisgrant.co.uk). Follow the instructions in this email to open your account and choose a password.

**If you have not received the welcome email please check your Junk folder and choose Never Block Senders "@davisgrant.co.uk"**

### Secure Account Login

- » Access the Document Portal by going to [www.davisgrant.co.uk/portal](http://www.davisgrant.co.uk/portal)
- » Enter your email address.
- » Enter the password you selected when you opened your account (see above).

#### Forgotten Your Password?

Select "Forgot Your Password?" and enter your email address to reset it automatically!



**NEED HELP?**

**Email [portal@davisgrant.co.uk](mailto:portal@davisgrant.co.uk) or call 020 8477 0000**

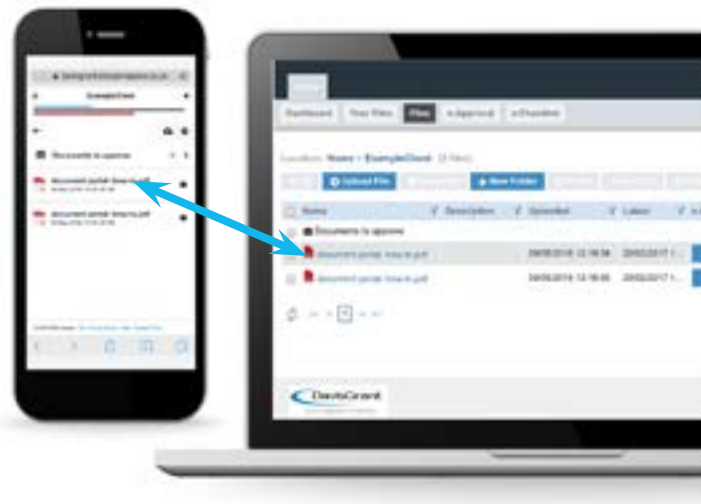


# Davis Grant Document Portal - Quick User Guide

## View Documents

Your archive of documents is always available for your reference. Go to the Document Portal and **Login**.

- i. On desktop select a Dashboard or select **Your Files** from the menu.
- ii. You may have to select the relevant **Client Name** from a list
- iii. Navigate folders by pressing on the folder name.
- iv. Simply select a document's name to view it.

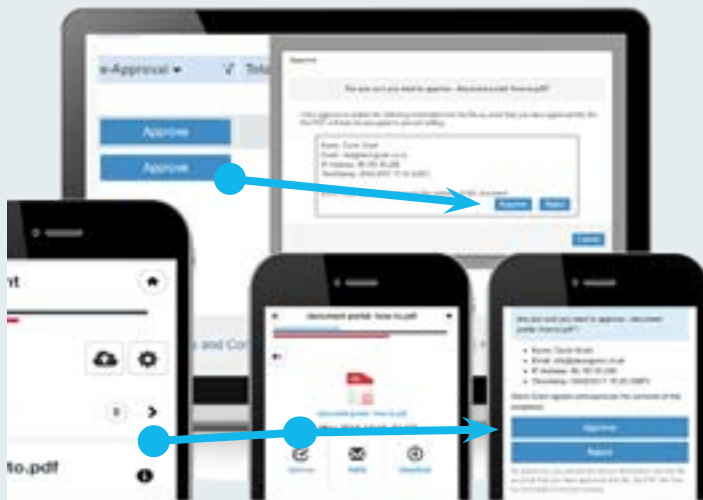


## Electronic Approval

We will let you know when a document is ready for final approval and submission.


1. **Login** and **View** the document (see above).
2. *On desktop* - press the **Approve** button.  
*On mobile* - press the **i** button next to the document name and then the  **Approve** icon.
3. To give final confirmation, sign the document by selecting **Approve**.

*Please note that you cannot approve a document until you have viewed it at least once!*

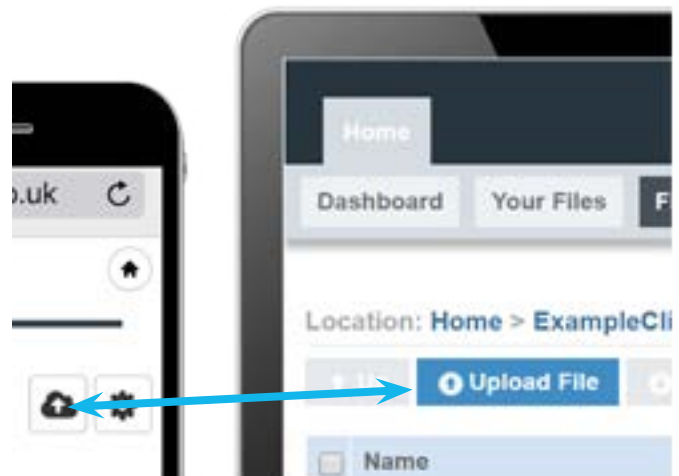


## Send Us Files Securely

You can securely send your files to us by uploading them into the Document Portal.

- a. **Login** and **View** the folder "Uploads" (see above)
- b. *On desktop* - Click on **Upload File** button.  
*On mobile* - Click on the  icon.
- c. Select the file on your device to upload.

*We will be able to access your files once you notify us that you have uploaded them.*



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