

xchangedocs

QUICK START GUIDE ONLINE PORTAL FOR STANDARD USERS [DESKTOP]

Introduction

A Standard User subscription of **xchangedocs** is a free service for a single-user access account.

Standard Subscription Features

- 1. Free service
- 2. Single-user access
- 3. User can receive and share documents in the context of a matter created by a Premium subscriber

Getting Started

If you have received a document by email from a sender who has used the **xchangedocs** platform, simply click the **SUBSCRIBE AND VIEW DOCUMENT** located in the email. You will be prompted to create your own free **xchangedocs** account to view and access the document(s) for download. Clicking the **SUBSCRIBE and VIEW DOCUMENT** button begins the quick subscription process.

xchange docs
Pam McQuaid of GREENBERG, GRIFFIN & MCQUAID has sent
you a document via xchangedocs.
To view this document, click on the link below to activate your
Standard xchangedocs subscription - this is a free service.
SUBSCRIBE and VIEW DOCUMENT
You will be required to subscribe if you are a first time user.
xchange docs
Documents on the move, safely.
This is an auto-generated email.
For more information on xchangedocs, please visit
www.xchangedocs.com: www.korbitec.ca/xchangedocs or call 1-800-340-3234
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Follow these steps:

- 1. Click the **Start Activation** button.
- 2. Click the Request Code button to verify your email address.
- 3. Check your email for receipt of the verification code.
- 4. Copy the verification code from your email and paste it into the **xchangedocs Activate Account window**.
- 5. Click Submit Code.
- 6. Click **Continue** in the next window.
- 7. Complete your user details.
- 8. Set your password and Accept Terms of Use.
- 9. Click Activate Account.



For assistance contact:

ACL Support 416.363.1650 x100 / 1.800.340.3234 x100 supportacl@dyedurham.com 1. Users will land on this screen after registering for the **xchangedocs** standard user account.

Note the Recent Documents tab is automatically selected, and users should see the initial document(s) shared with them.

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2. Users must download the initial document by clicking on the blue arrow to the right before they can send documents back using **xchangedocs**.

A message will appear confirming the initial document download, that the matter is now connected to the sender's (i.e. the firm's) ACL matter, and that users can send documents back under the same matter content. Click OK to proceed.

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Users will be directed to the matter context page where the initial document download is confirmed. Users can close the dialogs on the right, and click on Upload & Share to send documents back.

For assistance contact: ACL Support 416.363.1650 x100 / 1.800.340.3234 x100 supportacl@dyedurham.com

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4. From the Upload & Share page, users click on Select file(s). This will open the file explorer where they can select the required file(s) from their computer.

The files are brought into the upload page, where users will click in the "select recipients" field and type any letter. This will open a list of firm members who have access to the matter on the ACL/firm side, and users can select the correct recipients.

5. After the recipients are selected, users will click Upload & Share, and the process is complete.

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