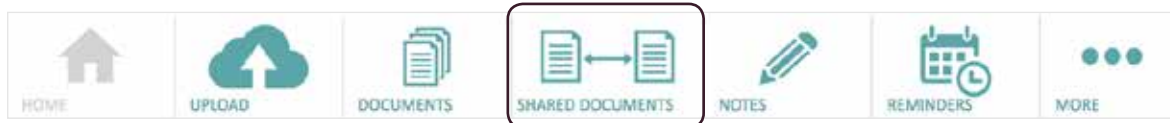


# Quick Start Guide

Now you are logged in, here's a guide to get you started.

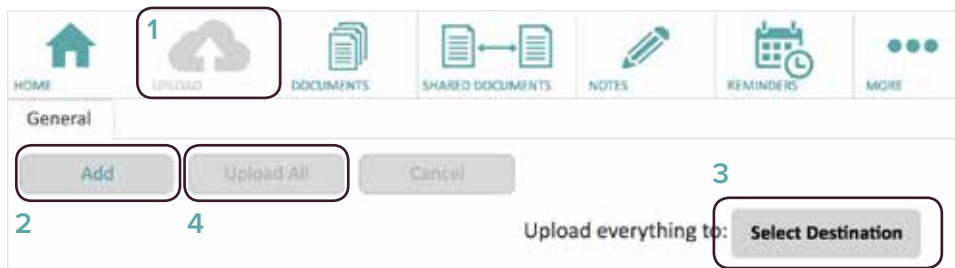
## How to view documents that have been shared with you

When we share a document, you can access it by simply clicking on the 'SHARED DOCUMENTS' tab along the top of the menu bar.



## Uploading a document

1. Click the 'UPLOAD' tab.
2. Select the 'Add' button and locate your chosen document(s) (or drag and drop).
3. Select the destination folder.
4. Click the 'Upload All' button.
5. Once uploaded, refresh the screen and the document will appear in the selected folder.



## Managing your personal documents

By clicking on 'DOCUMENTS' you can access the area which is completely private to you. Within here, you can add, rename and delete folders/documents as you wish.



Finally, to share back to us, ensure the document is highlighted, select the 'General' tab and then click 'Share'. On the next screen, you can either click 'Share' again or browse for a specific folder in the 'Select the Destination Folder' option.



Don't forget to add [app.wealthsafe.co.uk](http://app.wealthsafe.co.uk) to your browser favourites.

