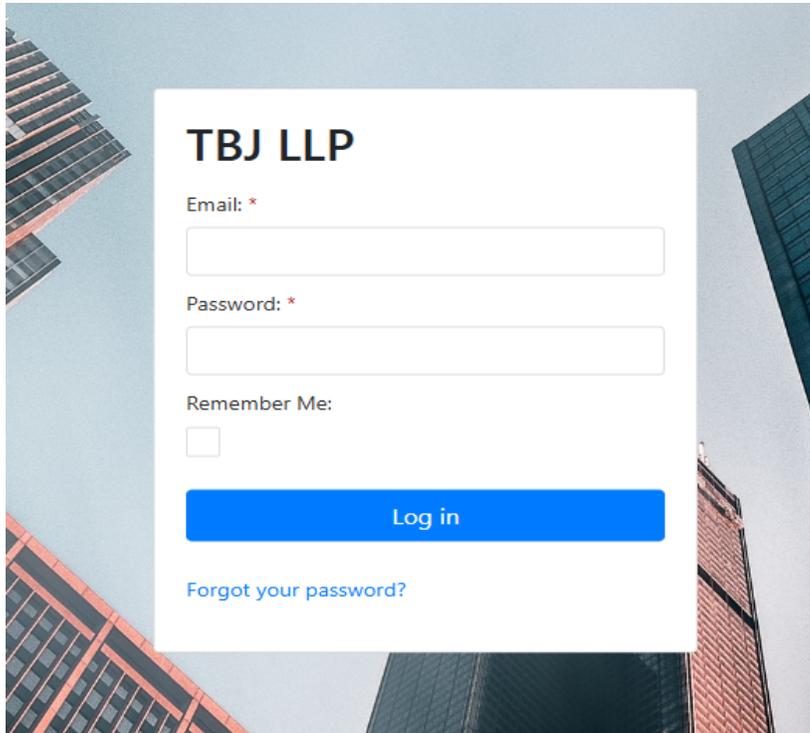


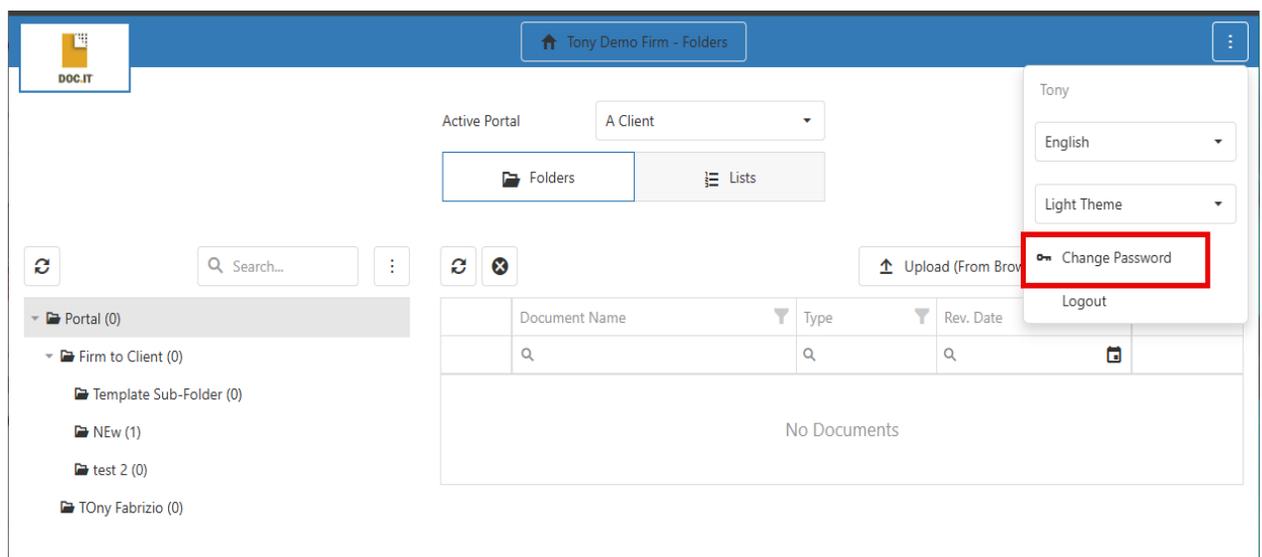
Logging In and Getting Started

1. Go to

<https://qz5jportal.docitcloud.com>

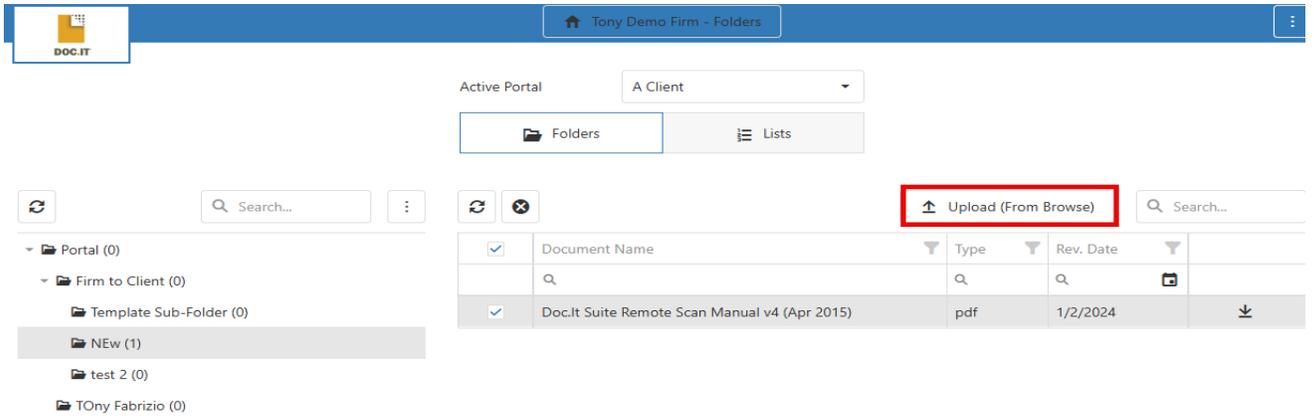


2. Enter your login (email address that you were set up with) and password.
 - a. For your original password, you were sent an email from TBJ to the email address that we set you up under that contains the original system-generated password.
3. Once you are logged in, you will see your company name top middle next to Active Portals and the folder directory to the left. There is an option to change your password in the top right drop-down menu.

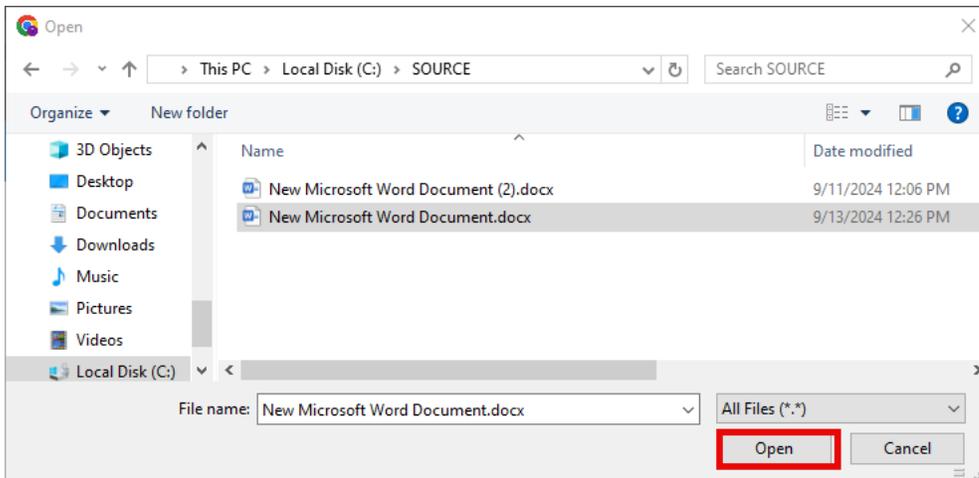


Uploading Files

4. To upload a file, click into the upload folder and select Upload (From Browse) button top right



5. A box will pop up, prompting you to browse for a file to upload. Choose the file and click the Open button.



6. Once you have selected the file(s) you would like to upload, you will see them in the screen below, verify that they are the correct file(s) and click the upload button.

DOC.IT Tony Demo Firm - Folders

Active Portal: A Client

Upload (From Browse)

Upload

Document Name	Type	Rev. Date	
Doc.It Suite Remote Scan Manual v4 (Apr 2015)	pdf	1/2/2024	↓
New Microsoft Word Document.docx ^{13 KB}	docx	12/3/2024	↓

7. When the upload completes, the file will appear in the folder selected.

DOC.IT Tony Demo Firm - Folders

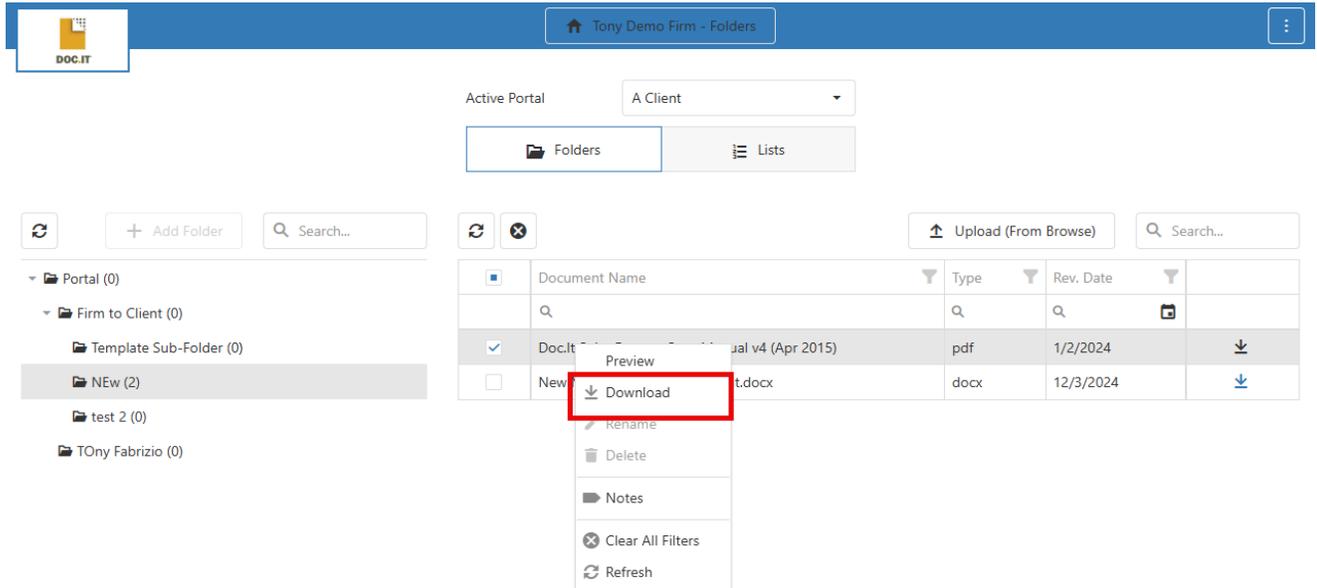
Active Portal: A Client

NEW (2)

Document Name	Type	Rev. Date	
Doc.It Suite Remote Scan Manual v4 (Apr 2015)	pdf	1/2/2024	↓
New Microsoft Word Document.docx	docx	12/3/2024	↓

Downloading Files

- Go into the download folder and right click the document that you would like to download. Select Download from the resulting drop-down menu.



The screenshot displays a web-based document management system. At the top, there is a blue header with the logo 'DOC.IT' on the left and a breadcrumb trail 'Tony Demo Firm - Folders' on the right. Below the header, the 'Active Portal' is set to 'A Client'. There are two tabs: 'Folders' (selected) and 'Lists'. On the left side, a folder tree shows a hierarchy: 'Portal (0)' > 'Firm to Client (0)' > 'Template Sub-Folder (0)' > 'NEw (2)' (selected) > 'test 2 (0)' > 'TOny Fabrizio (0)'. The main area features a search bar and an 'Upload (From Browse)' button. Below this is a table of documents:

	Document Name	Type	Rev. Date	
<input type="checkbox"/>	Q	Q	Q	
<input checked="" type="checkbox"/>	Doc.It [redacted] Annual v4 (Apr 2015)	pdf	1/2/2024	
<input type="checkbox"/>	New [redacted].docx	docx	12/3/2024	

A context menu is open over the second row of the table, with the 'Download' option highlighted by a red box. Other options in the menu include 'Preview', 'Rename', 'Delete', 'Notes', 'Clear All Filters', and 'Refresh'.