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What is the KMG portal?

It is an online document store which we will use to securely and digitally share your meeting reports, valuations and any other documents which may contain personal data.

The software that we use is provided by Watermark.


Which email address should I use?

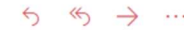
The team will ask you to confirm which email you would like to use for the portal, because each portal account can only have one email address linked to it. This email address will receive the activation invitation and will then be used as the username to log in to the papercloud account.

This means that if you are a couple you could both use the same email address to log in and use the portal.

How to activate your account

You will receive an email which invites you to activate your account:

 papercloud@watermarktech.co.uk
Tue 14/04/2020 14:21
To: You



Welcome to Papercloud

KMG Independent Limited has added you to their system.

Once you have obtained an activation code from KMG Independent Limited please click the following link to complete your account setup or decline the invitation:

[Click here to activate](#)

Thank you,

Watermark Technologies Accounts Service

Please note that this email will expire after ten days, after which you will need to request a new activation email from the KMG team.

It is recommended that you complete the activation process on a computer rather than a mobile phone or tablet.

Click on the text "click here to activate" to open a web page for registration. This link is unique to you and will only work if you use the same email address to register as that which you received the invitation.

Follow the instructions on screen to enter your name and choose a password. If the password that you choose is not strong enough then the website will prompt you to choose a stronger one.

How to log in

Go to <https://papercloudelite.co.uk/> to log in and enter your email address and chosen password, then click the green sign in button:



The portal tends to work best on a computer and Watermark have said that it does not currently support iPads, but they are working on an update which will be out at the end of 2020 which will support iPads.

How to reset your password if you have forgotten it

Use the “forgot password?” link on <https://papercloudelite.co.uk/>. This will send a link to your email address which allows you to reset your password.

How to view your documents

Your documents will have been saved by a member of the KMG team on the “Client View” tab.

Each box is a document and they are filed in rows to keep things organised. Click on a box to view a document and that box will get slightly bigger than the others.

The pages of the document will then be displayed at the bottom of the page, but they will probably be too small to read.

To increase the size of the pages you can either click on this “up” arrow (and click the down arrow when you are finished)

Or you can click on an individual page of the document. This will open a display which allows you to zoom in or out and use the “next” and “previous” arrows to scroll to each page of the document.

How will I know when there is a new document?

A member of the team will always let you know by email or otherwise when there is a new document to view.

How to download print, or save a document

Downloading a document will allow you to print or save it to your computer.

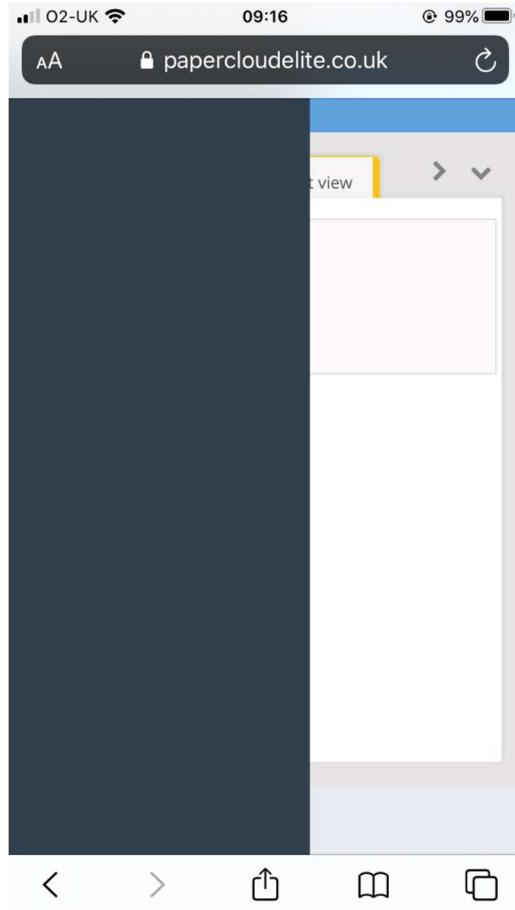
1. Left-click on the document that you want to download so that you can see the individual pages of the document at the bottom of the screen.
2. Press and hold the shift key on your keyboard. Left-click the first page of the document. The page should now be highlighted in red.
3. Still holding the shift key, left-click the last page of the document. All pages should now be highlighted in red.
4. You can now let go of the shift key. Right-click any page of the document and select "download".
5. The document will then be downloaded to your computer, possibly in the "downloads" folder depending on your personal computer settings.

How to log out

The screenshot shows the Papercloud Elite web interface. At the top, the user is logged in as "Barker, Gemma" with fields for "Name", "DoB", and "Reference". Below this, there are tabs for "Portal Uploaded" and "Client view". The main area contains sections for "Correspondence" (with a "Valuation Report (VR)" dated 20/05/2020), "Valuations" (with a "Valuation" dated 23/06/2020), and "Client forms". A text box is overlaid on the interface with the instruction: "Click on your initials in the top-right corner of the screen to launch this menu which allows you to change your name (Edit profile), change your password, get help from Watermark or log out." A blue arrow points from this text box to the initials "GB" in the top right corner. A dropdown menu is open from these initials, listing the following options: "Edit Profile", "Change Password", "Get Support", "Support Connection", "Update Connect", and "Log Out". At the bottom of the screen, there are three panels: a "Valuation Report" for "Proposed for Test Test" dated 10 June 2020, a "Proposed for Test Test" summary table, and a "GAA" (Global Asset Allocation) table showing various assets and their values.

Click on your initials in the top-right corner of the screen to launch this menu which allows you to change your name (Edit profile), change your password, get help from Watermark or log out.

Why does my portal look like this?



This is an image of the portal accessed on an iPhone. The portal does not support iPhone or any other smart phone because the screens are not big enough, so it is recommended that you access your portal on a computer.