USING YOUR VAULT

The Guide for installing, navigating and filling your Digital Vault Portal.

2022

1. Getting Started.

Installing your vault app.

This section outlines the THREE steps required to securely download & activate your Desktop App vault.

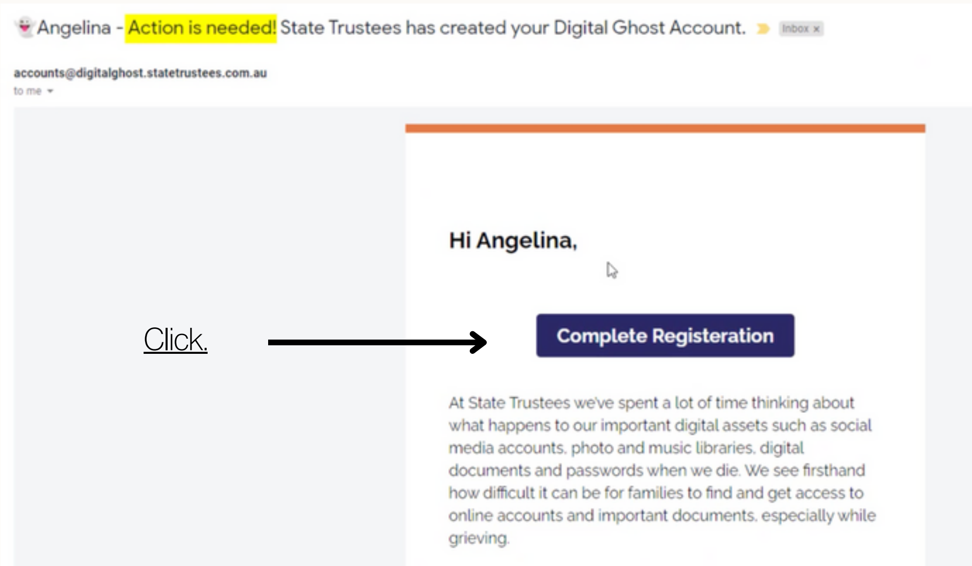
1. Email → 2. Download → 3. Install

INSTRUCTIONS

1. Email

To download your vault, log into the email account your provider registered you with and look for the email with the subject line 'Action is Needed'.

Open this email, and then click on the 'Complete Registration' button.



2. Download

Your internet browser will open, and your digital vault will begin downloading to your computer.

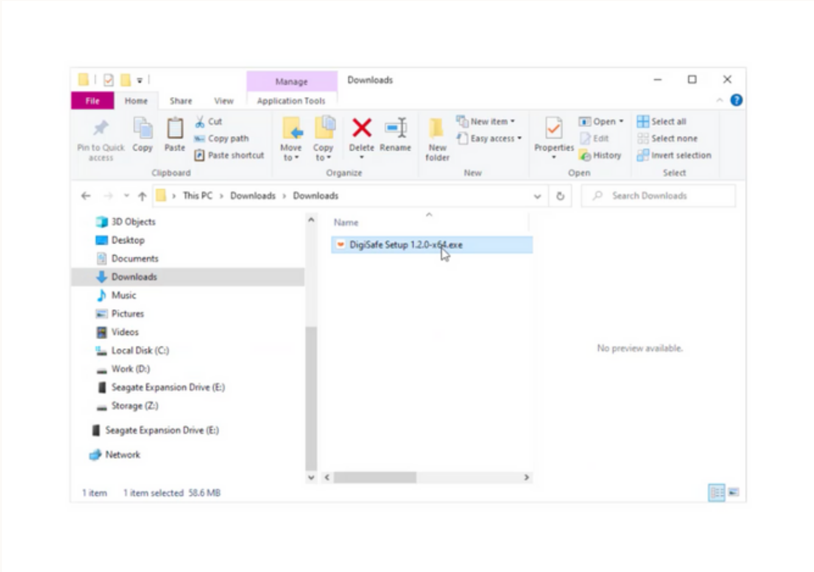
This is an automatic process. Download time may take 10-30 seconds.

3. Install

Once your vault has been downloaded, open on your

MAC **Finder**

WINDOWS **Explorer**



Select your 'Downloads' folder, look for a file name that matches your provider, then;

MAC **Double Click the File, Drag and drop into Application Folder**

WINDOWS **Double Click File**

to complete installation.

Congratulations.
You have successfully installed the app.

You now have desktop access to your secure digital storage vault.

INSTRUCTIONS

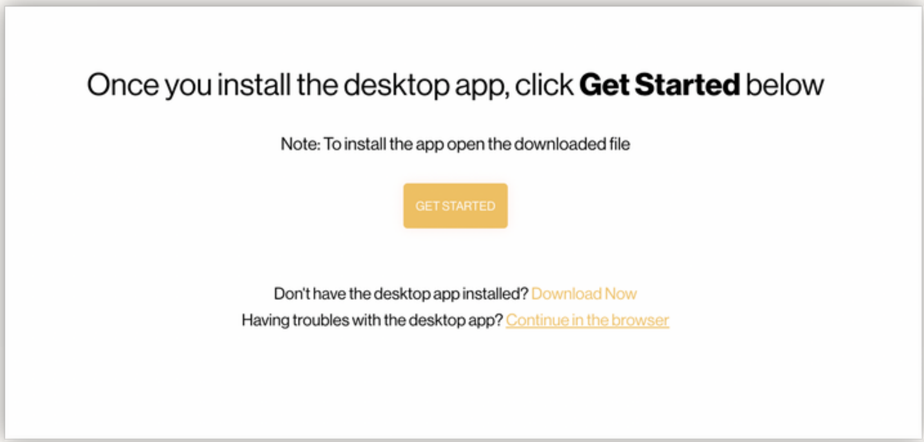
4. Opening the App for the First Time

Return to your browser and click the 'Get Started' button.

A window will pop up prompting you to open the app.

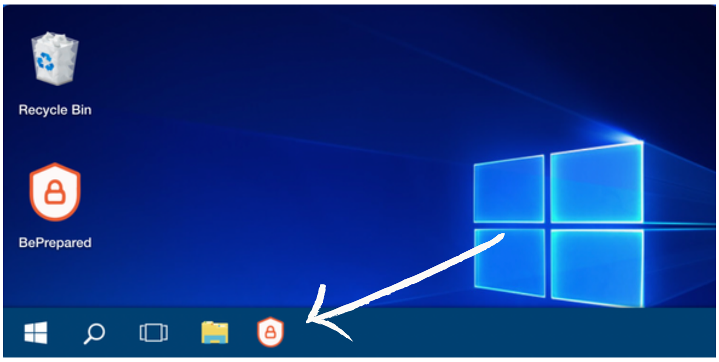
If prompted, click 'Allow Access'.

Click 'Open App'.



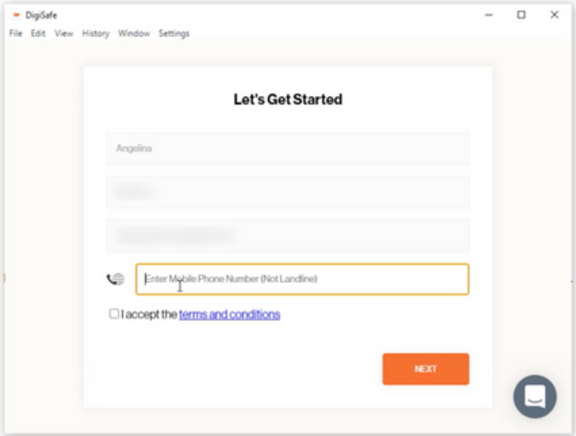
5. Opening the App In The Future

When you next wish to open your vault, navigate to your applications list (either on the start menu or the taskbar) and double click your vault.



INSTRUCTIONS

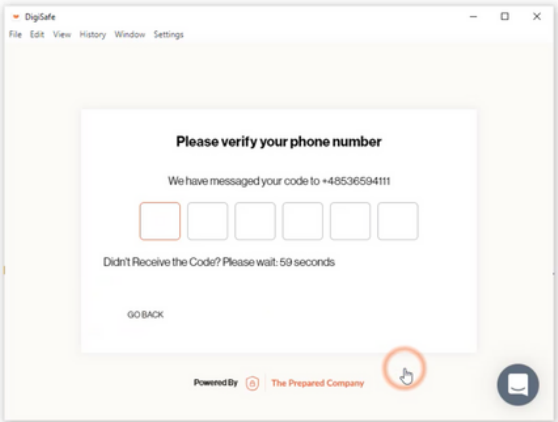
6. Account Set Up



Following the on-screen prompts, first:

- check your details
- confirm your phone number

Select 'Next'.



You will receive a 6-digit code via text message to your phone.

This may take a couple of minutes to come through.

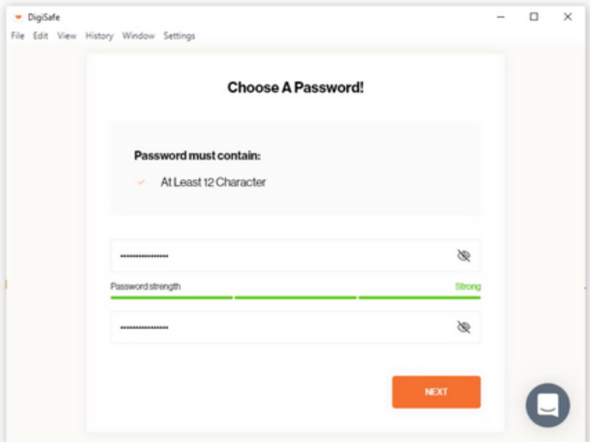
- enter your 6-digit code.

- Choose a <u>strong</u> password,

Select 'Next'

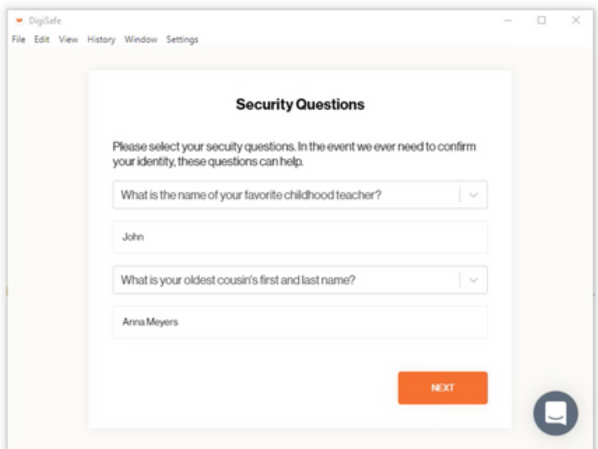
IMPORTANT!

- Do not share your password with anyone.
- We can not see your password.
- We will <u>never</u> ask you for your password, including in email or over the phone.



- Set your security questions.

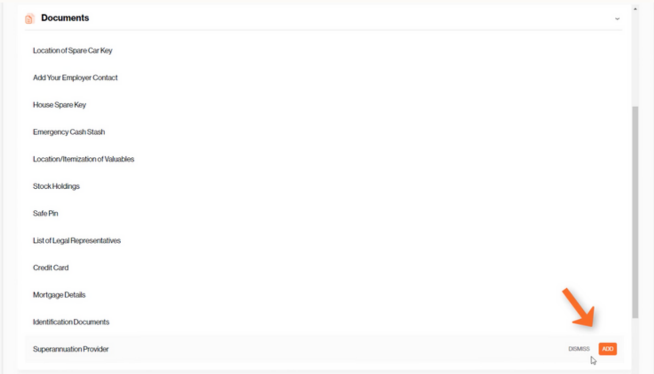
Select 'Next'.

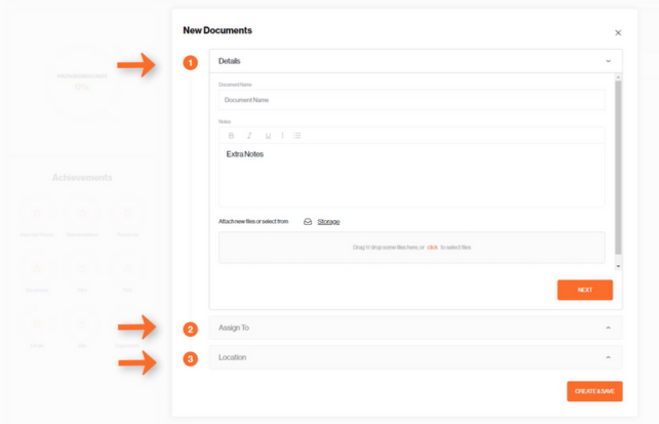


Your vault is now set up and you're ready to go!

USING YOUR SECURE DIGITAL VAULT

The Home Page.





Welcome to your secure digital vault.

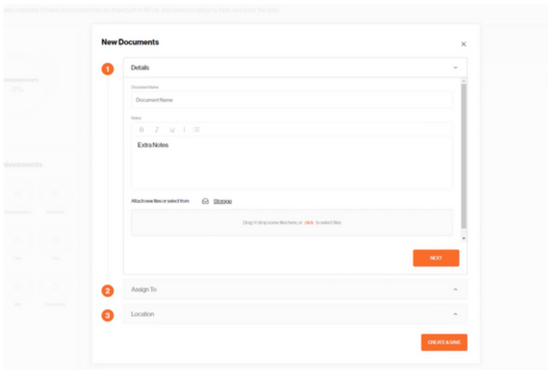
On the Home Screen, you will see a handy 'to do' list full of suggested items to include in your vault.

To add an item, simply click the 'ADD' button.

All records in the vault are added using a simple 1, 2, 3 process.

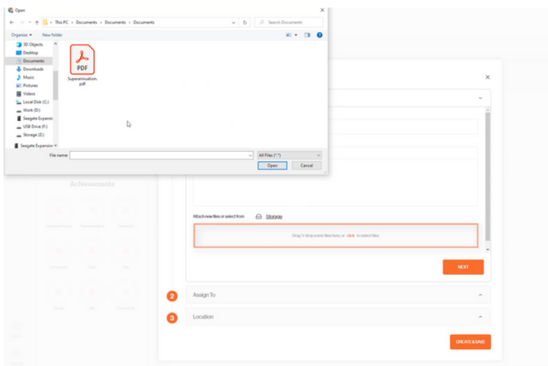
STEP ONE - Details:

Follow the prompts in each text field to populate the file. You can return & edit this later, but add what you can now (the more you add now, the easier your life will be later!).

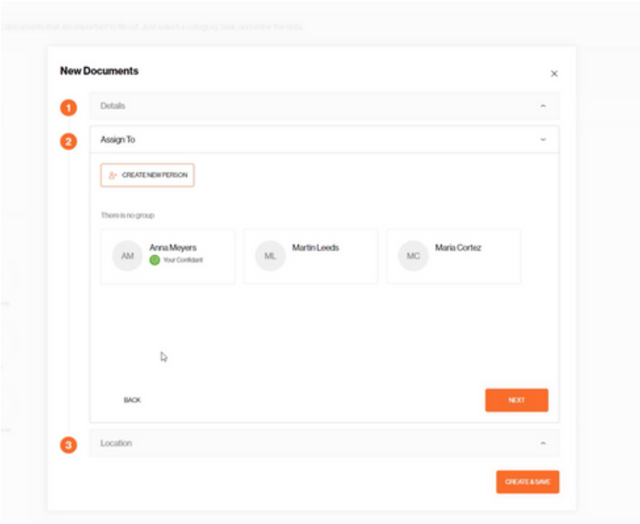


STEP ONE - Attachments:

Scrolling pas the prompts, if you have any relevant files you would like to attach. Do this now.
Select 'Next'.



STEP TWO - Assign to:



This is where you assign who will receive your document in the future.

You can select someone from the menu to receive the item.

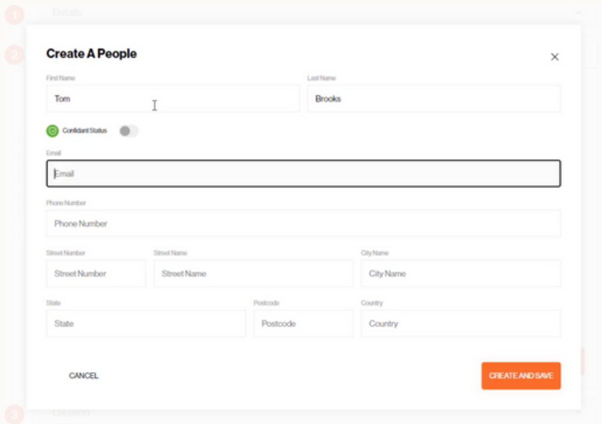
If you don't have any people in your account yet, you can create one now.

Click the 'create new person' button.

STEP TWO - Create a Person:

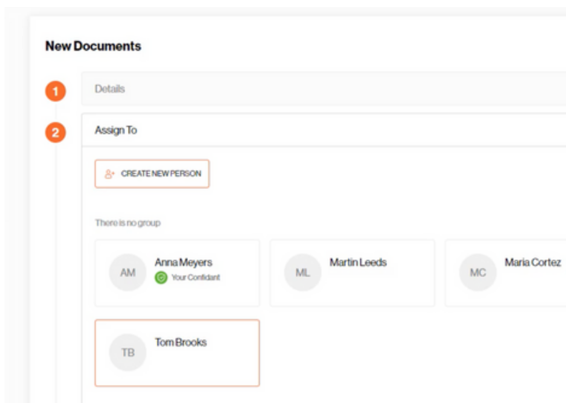
Fill in the person's details and click 'Create & Save' in the bottom right corner.

You will be able to find & update your newly added person under the 'People' tab later on.



3. STEP TWO - Assign File:

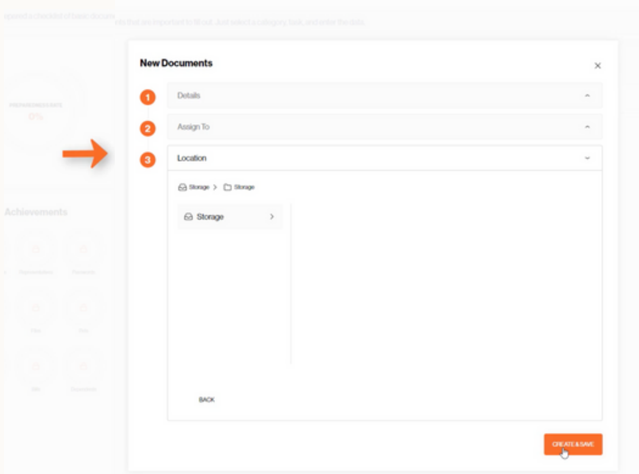
You can now click on one or more people to assign this specific file to them.

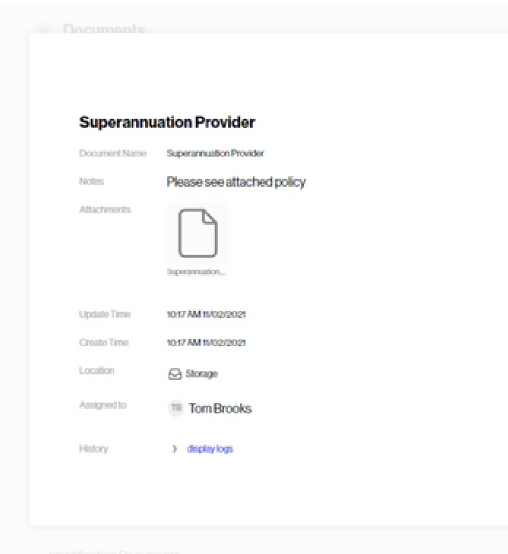


STEP THREE - Location

Choose where to save this item in your vault. You won't have any folders yet, so click 'Create & Save'.

You can re-organise your files later if you choose.

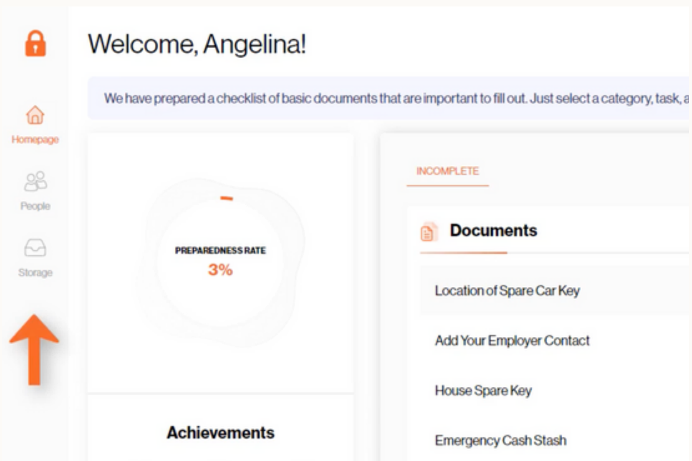




Data Review

Here you will see a preview of the new file you have created. It will include information about attachments, and importantly who the file is assigned.

Once you have reviewed this, click the 'X' in the top right corner.



Finding your new file

All your added information will appear in the storage tab located on the left side of your screen,

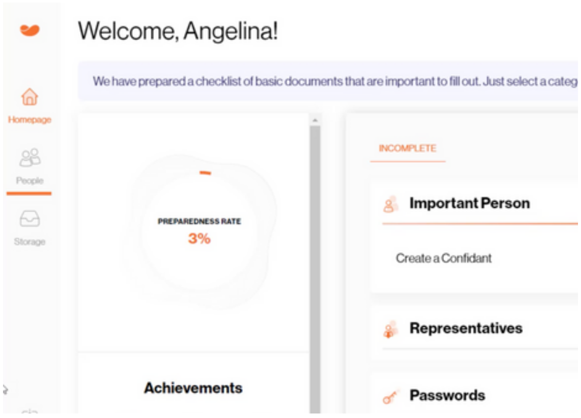
If you need any help while using your vault, click the chat box in the lower right corner of the screen to talk to a support member.

Happy preparing!

USING YOUR SECURE DIGITAL VAULT

Add Recipients (Your People).

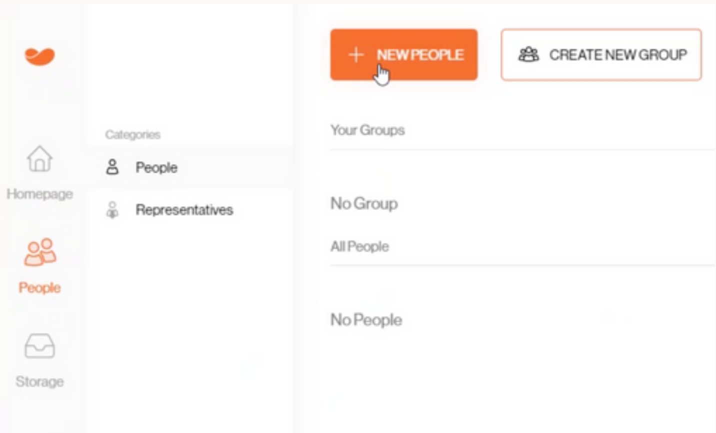
When setting up your digital vault, one of the most crucial parts is adding people you wish to receive your digital assets. We call these people 'recipients'.



INSTRUCTIONS

1. The 'People' Tab

To add a recipient, open the application and click on the 'People' tab to the left side of your screen.

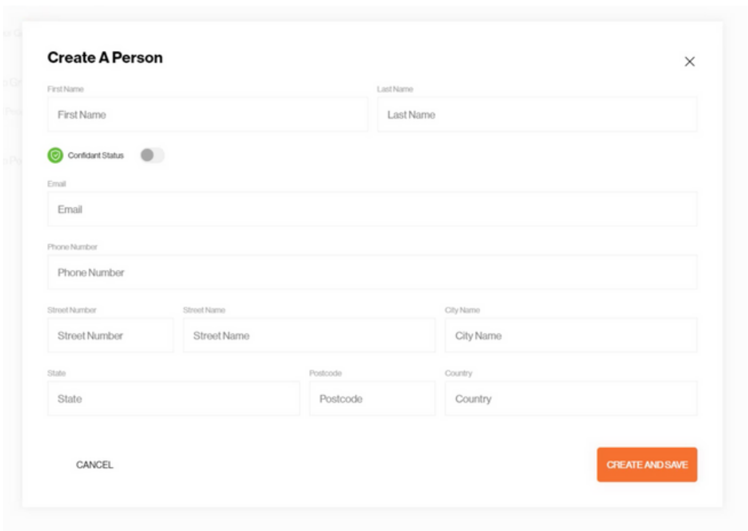


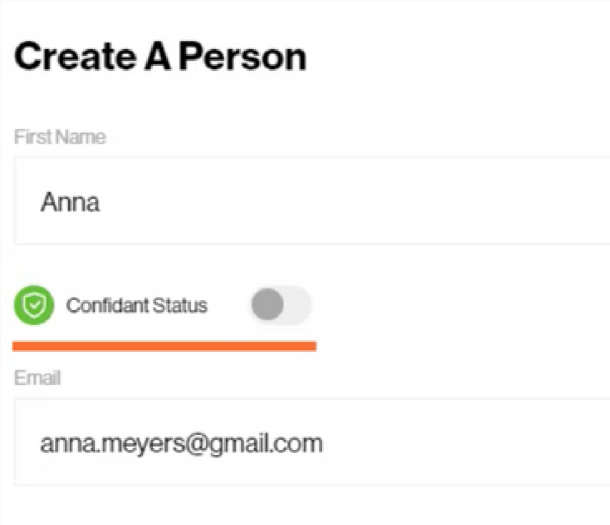
2. Add New Person

Next click on the '+ New People' button near the top of the window.

3. Personal Details

Enter in your intended recipient's name, email address, phone number and any other pertinent details.





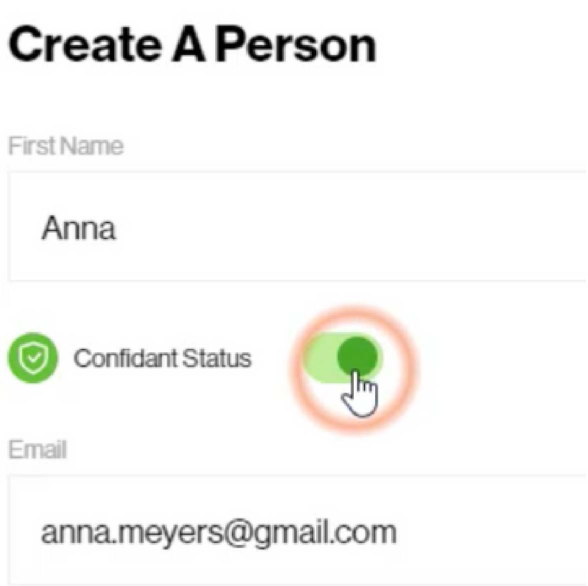
What is a Confidant?

A Confidant is a person you assign that will be required to confirm your death before any of your files and data is released.

You will want to consider this decision carefully, and assign only people that you trust.

We recommend assigning at least 2 -3 people to take on this role.

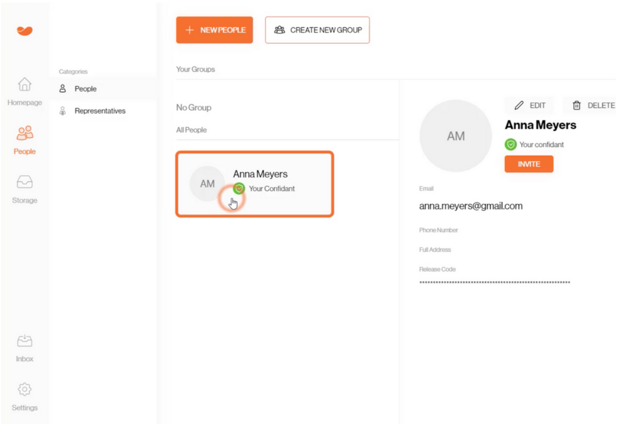
All Confidants must unanimously agree on your passing to begin the verification & data release process.



4. The Confidant Status

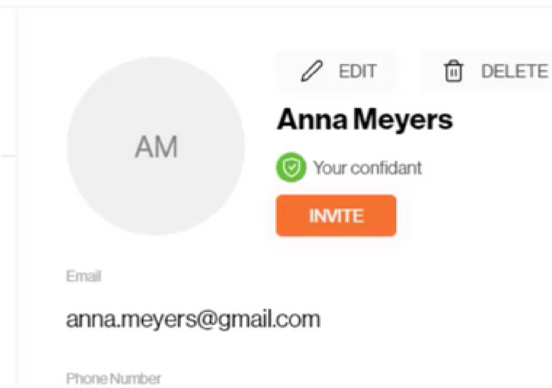
If you'd like this person to be a confidant click the toggle button next to 'Confidant Status'.

When you're done, click Create and Save.



5. View & Edit Person

To view or edit a person, select their name, and then click 'edit' their name next to the profile picture.



6. Invite your Recipients.

Our aim (you and us) is to make it as easy as possible for your recipients to receive your data when you pass away.

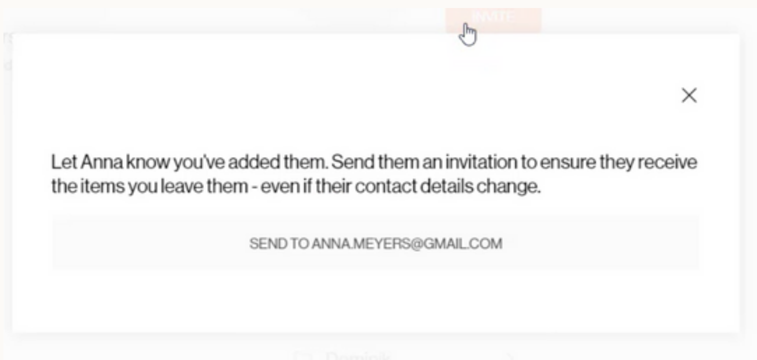
To support your recipients, we recommend you let people know (especially confidants) when you add them to your vault.

They will not be able to see any of your data.

To inform your recipient, click the person's name, and then click the 'invite' button.

7. Send Invite

Click 'Send to .....' and your person will receive an email letting them know.



USING YOUR SECURE DIGITAL VAULT

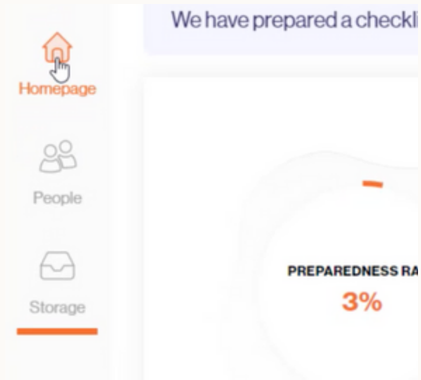
Creating Documents

INSTRUCTIONS

1. The 'Storage' Tab

It is recommended that you use these templates when adding specific types of data to ensure that all the required and pertinent information relevant to each is included for your recipients.

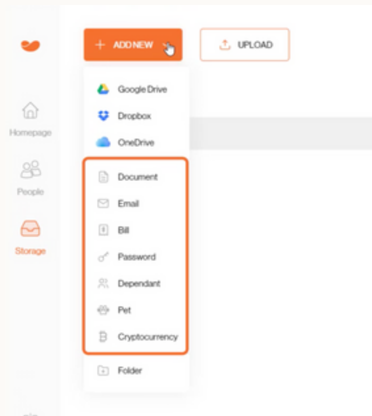
To add any of these types of data, navigate to the storage tab on the left side of the window.

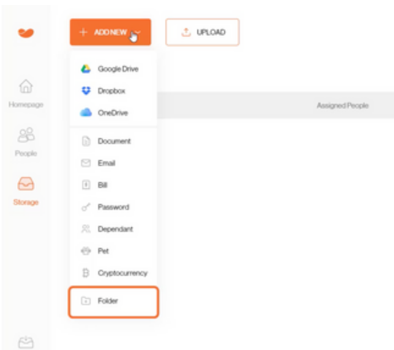


2. Selecting Templates

Your Digital Vault has a number of built-in file types to help you upload and store your data effectively & securely.

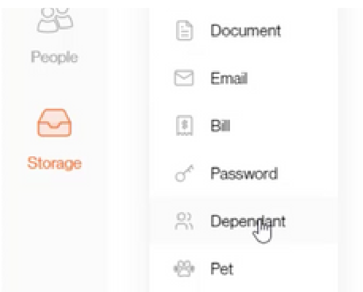
These types include: Passwords, Cryptocurrency, Dependents, Pets, Bills, Emails, Documents.





3. Creating Folders

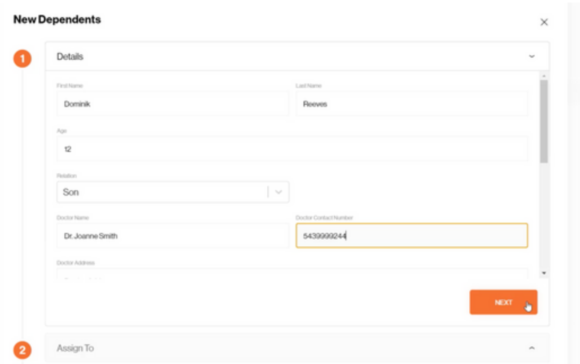
You can also create folders to help organise your data if you'd like.



4. Selecting your Template

Hover your mouse on the 'add new' button, and then select the type of file you wish to add from the dropdown menu.

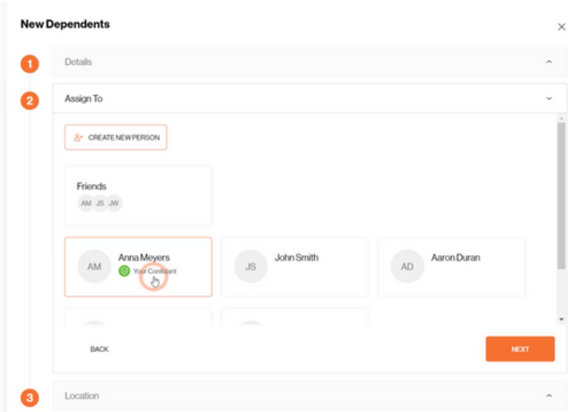
For this example we will use the Dependant Template.



5. The 1, 2, 3 Data Process

All template data is added using a simple 1, 2, 3 step process.

STEP ONE: Fill out as many fields as possible. You can also attach any helpful files and leave instructions.



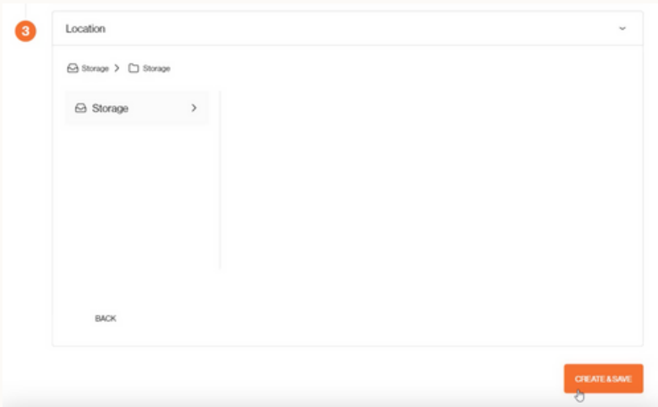
6. Assign Content

STEP TWO: select which group or individuals you'd like to receive this item.

7. Save your File

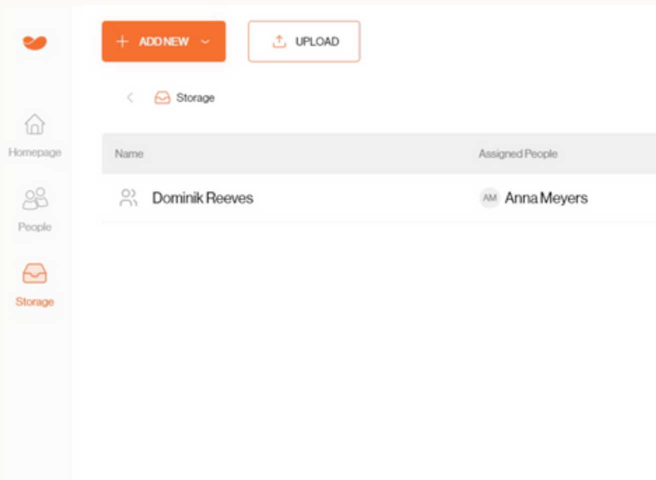
STEP THREE: you can choose to move where this item is stored in your vault if needed.

When you're done, simply click 'Create and Save'.



8. Find your File

You can find your new file in the 'Storage' tab. Click the file name to open information and editing options.



USING YOUR SECURE DIGITAL VAULT

Uploading your own Files.

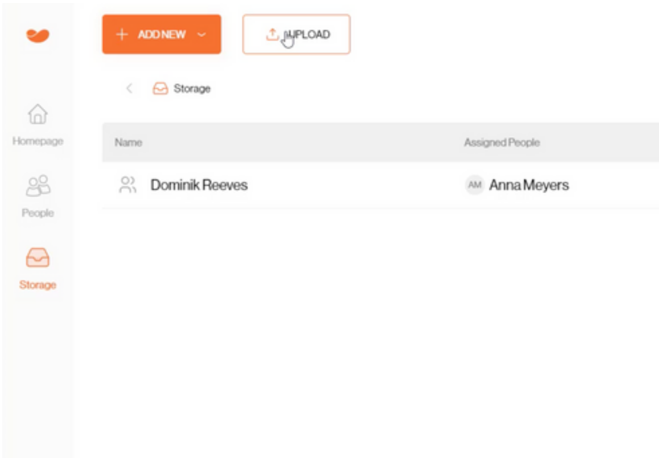
INSTRUCTIONS

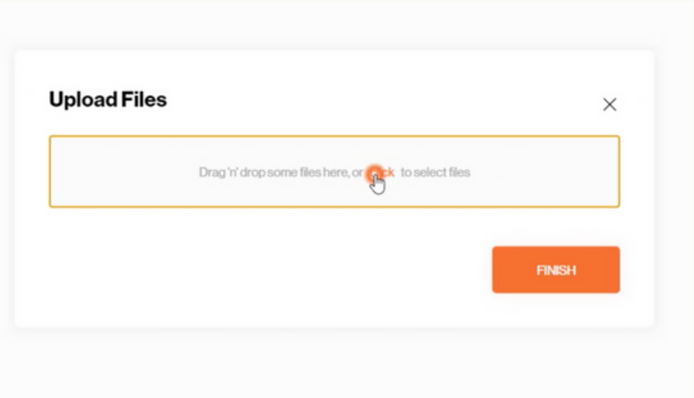
1. Upload Personal Files

You can upload almost any type of file from your computer into your digital vault.

To upload a file, navigate to the 'Storage' tab on the left side of the window and click on it.

To upload an item, simply click on the upload button at the top.





2. Import File

An upload dialogue box will appear.

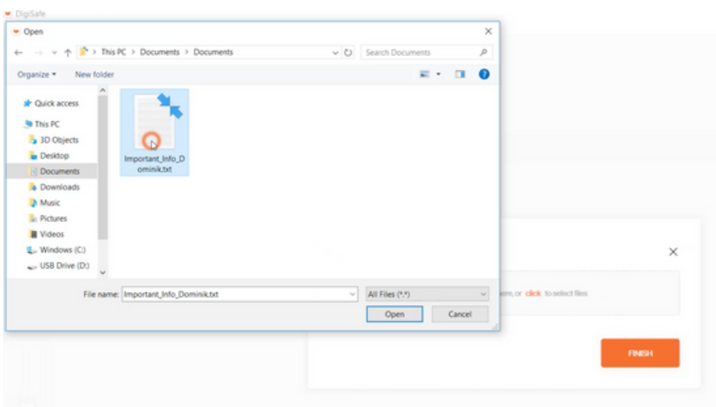
You can either click on this box, or drag a file in.

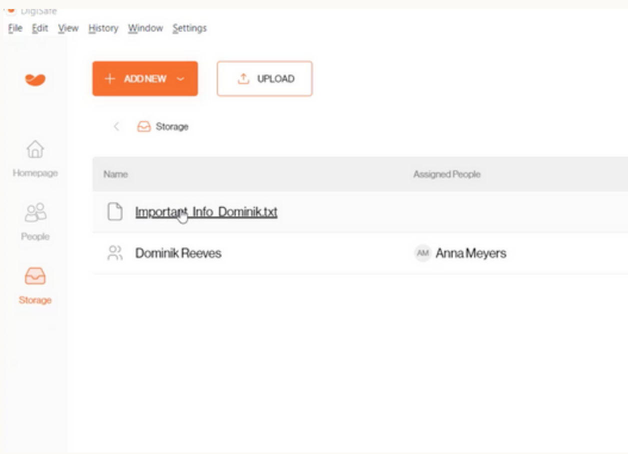
3. Selecting File

Navigate through your finder window and select the file you want to upload.

Click 'Open'.

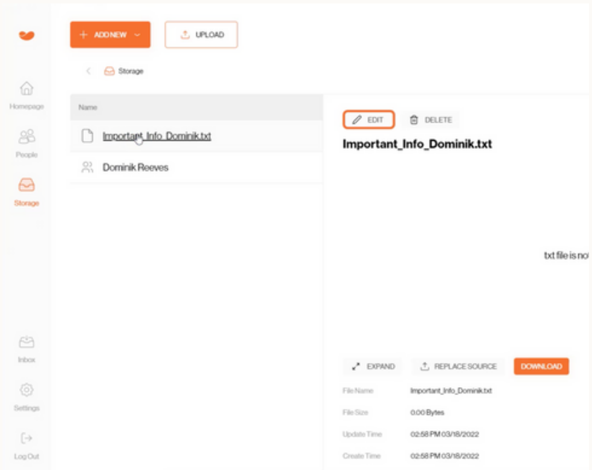
Once a file has finished uploading, it will be encrypted in your vault.





4. Access Your File

Return to your 'Storage' tab, click on the file name. Here you will be able to see all your file's data, including who you have assigned to the file.



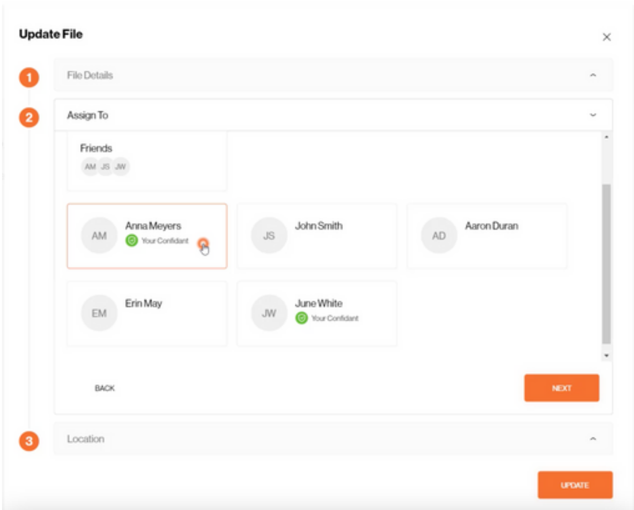
5. Edit your File

Click on the 'Edit' button located above the file name in the data window.

7. Assign a Recipient

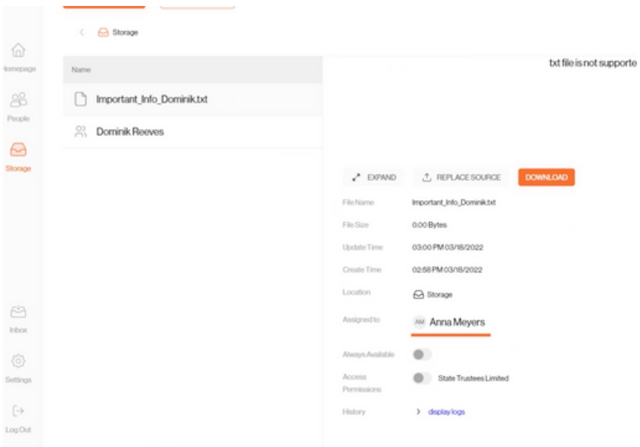
Select 'Assign To' field and change who you want to receive this file.

Click 'Update' to save your changes.



8. View your Changes

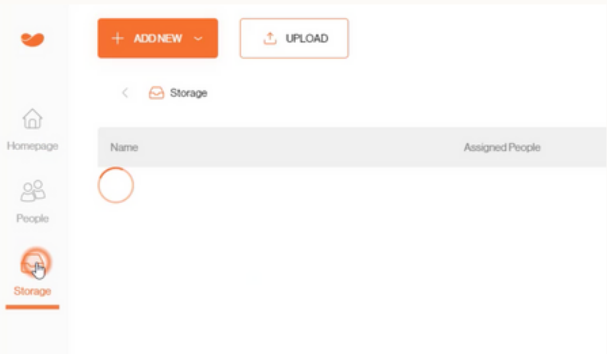
Click on the file name, you will now see the updated information added to the 'Assigned' field.



USING YOUR SECURE DIGITAL VAULT

Creating a Folder

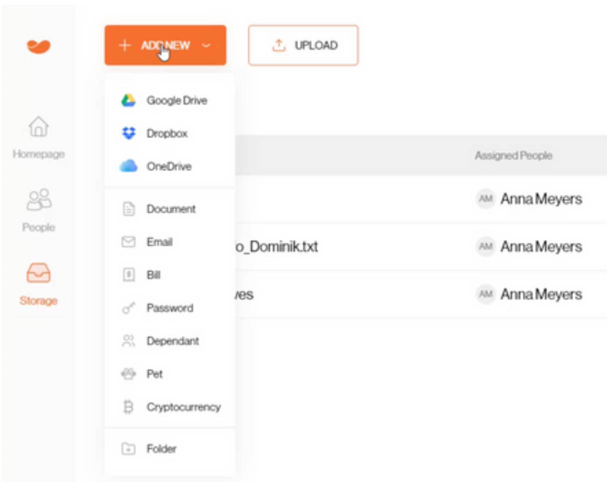
Creating folders is a great way to organise your data, and also assign it in bulk. It can be easier to put all your data in a folder and assign that folder to a person, than assign 24 items individually to a person.



INSTRUCTIONS

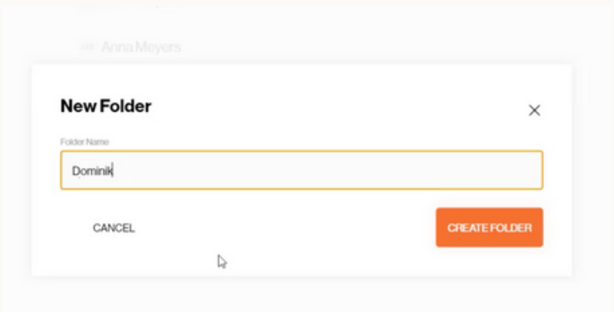
1. Navigate to 'Storage' tab

To create a folder, open the application and navigate to the storage tab on the left.



2. Add new folder

Hover your mouse on the 'add new' button, and select the folder option at the very bottom of the list.

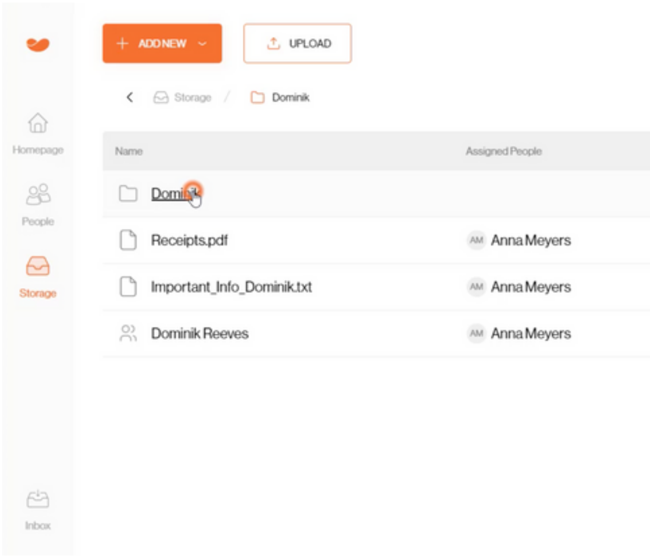


3. Name Your Folder

Enter a name for your folder and click 'Create Folder'.

4. Folder information tab

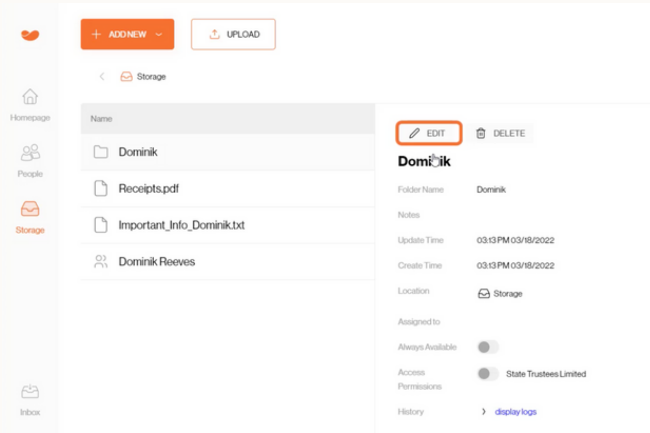
Single click on a folder to open the information tab



5. Edit & Assign

Click 'edit' to assign the folder to a group or individual(s).

Keep in mind, anything you add to this folder will now be received by everyone you assign.



6. Add to folder

You can double click on the folder name to open and access.

Refer to our Guide for instructions on uploading & creating files and documents.