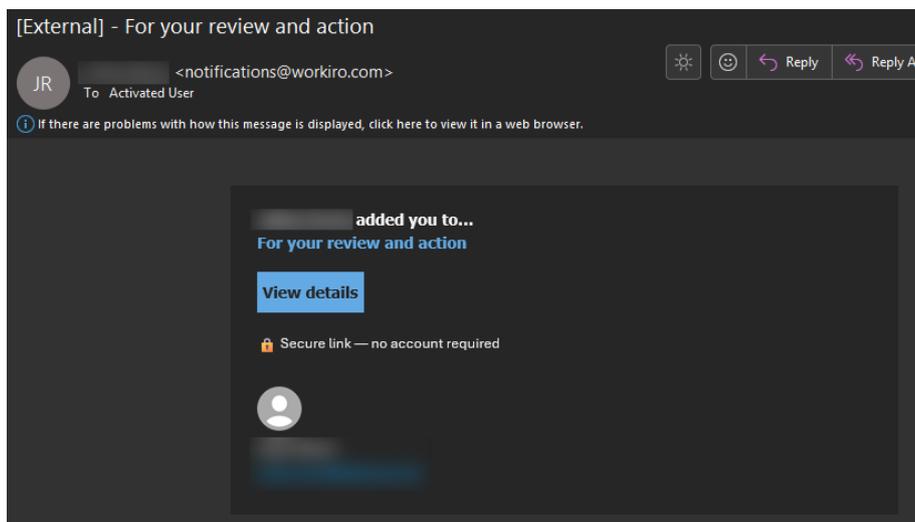


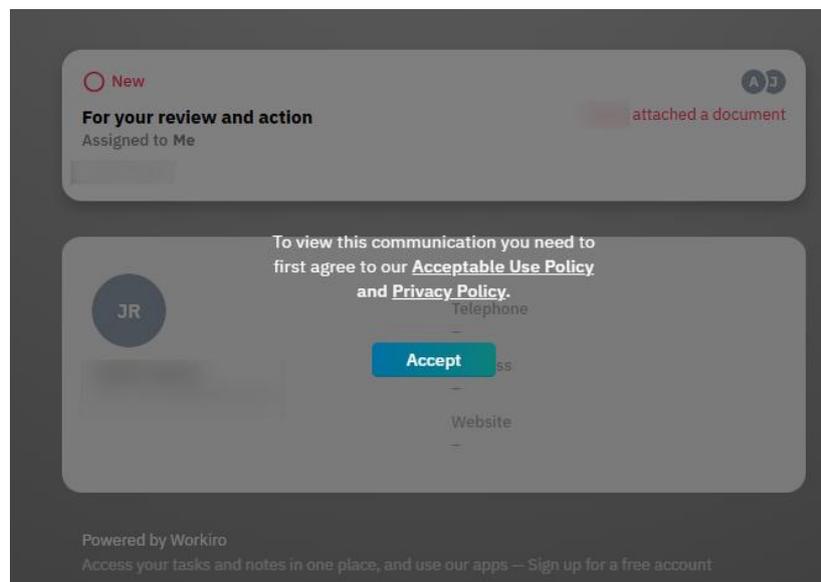
Setting up your Account for the First Time

1. When you are sent a thread from the Workiro system, you will receive an email for this and a link to view the thread directly. These links are typically valid for 48 hours or up to 5 uses, whichever comes first.

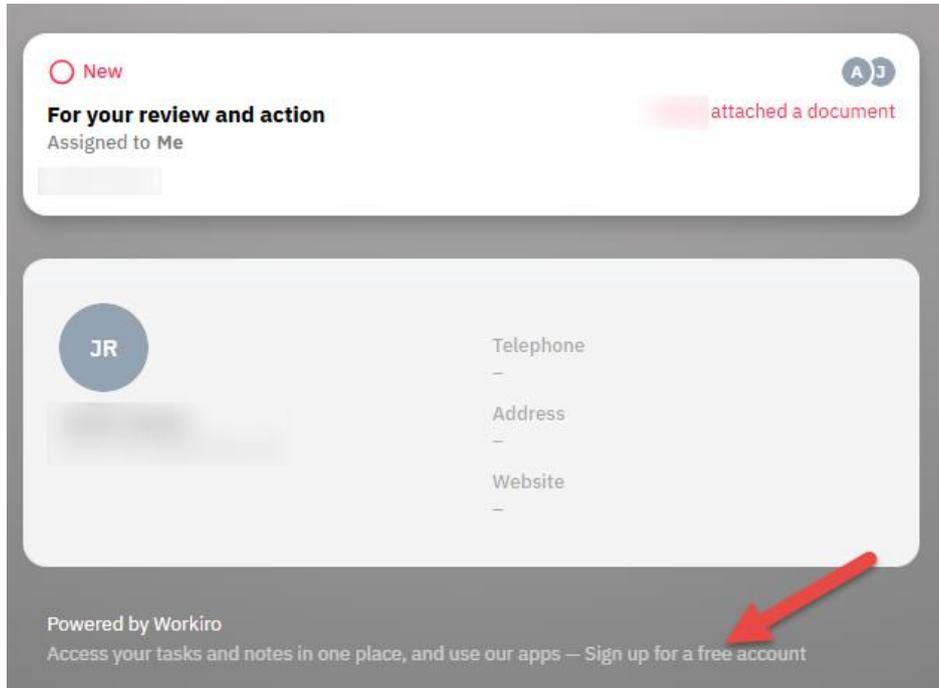
You will receive a new email and link when an update has occurred on the thread that you have not yet seen.



2. When you click onto this link, you will be taken to the Workiro website where you can view the thread and any relevant documents attached. On your first time using the system, you will be prompted to accept the Terms & Conditions:



3. Once you have accepted the Terms & Conditions, you will see an option at the bottom of the page to 'Sign up for a free account'. This free account allows you to sign into your Workiro account at any time without the need of an email link:

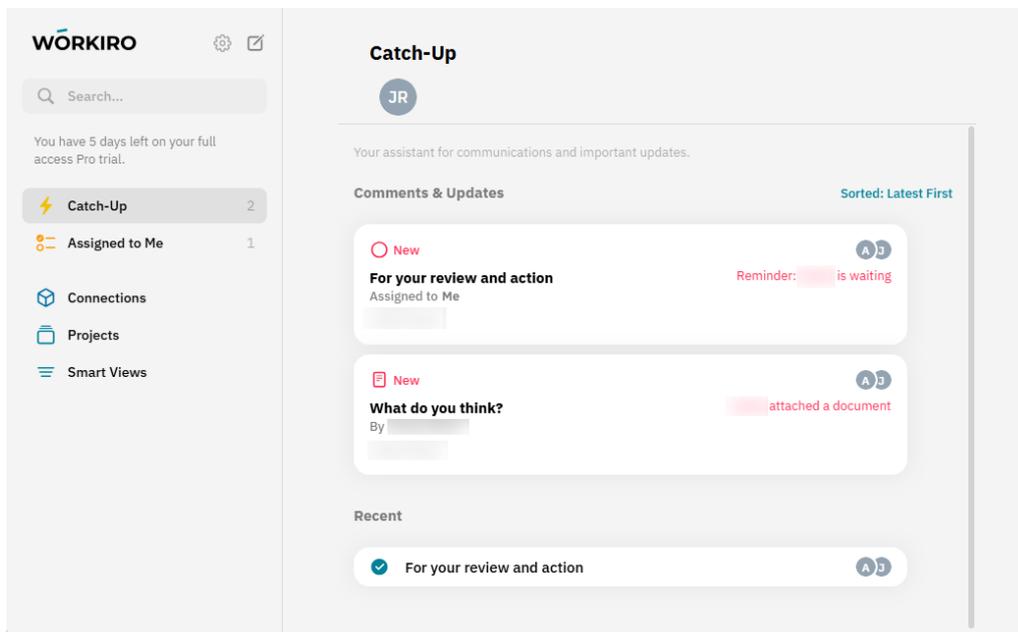


Clicking into this option, you will be prompted to create an account:

A screenshot of the 'Create account' form in Workiro. The form has a teal background and contains the following fields: 'John' with a checkmark, 'Smith' with a checkmark, an empty field, and 'Phone' with a red '...' icon. A black 'Next' button is at the bottom.

Once your account is created, you can freely access the system at any time by using the link to the portal on our [website](#).

4. When you sign into your account, you will see a page similar to the one below:

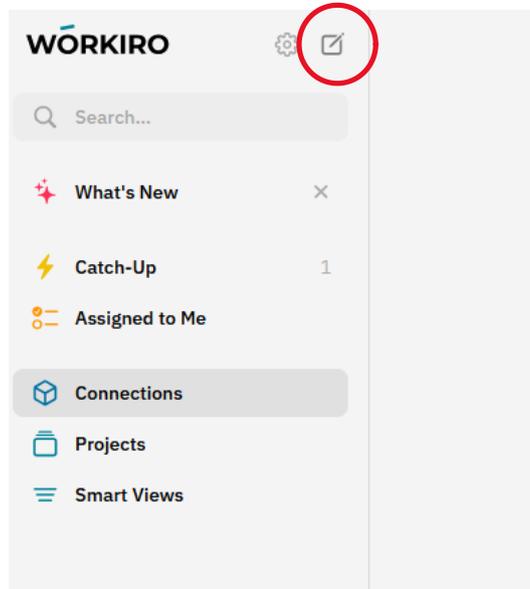


Please note: You can access messages sent to you in Workiro from us without setting up an account but, if you are involved with multiple threads, you will receive an email and link for each thread individually.

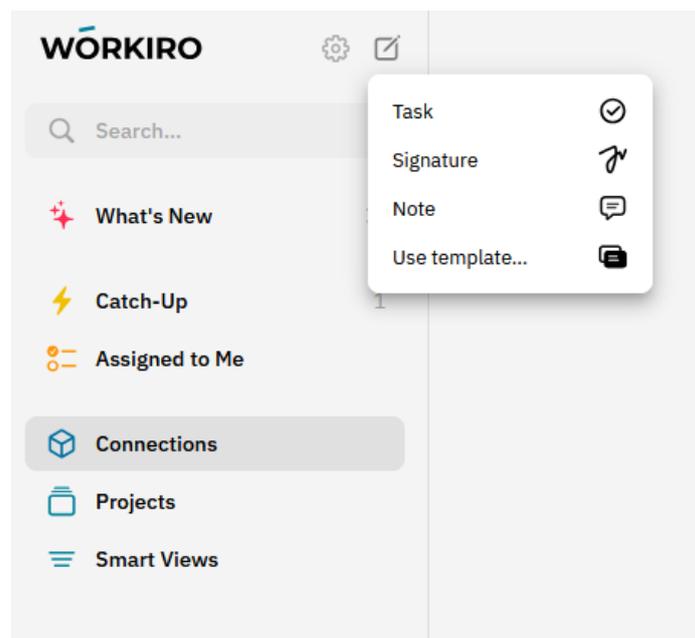
If you wish to be able to see all threads in a single location, you will need to create a full account using the same email address. There is no charge to you for this account. Please see **Sign Up** option at the bottom of step 3 image within this guide.

Uploading Documents and/or Sending Information Messages Securely

To start a message to us, click on the Pen symbol:



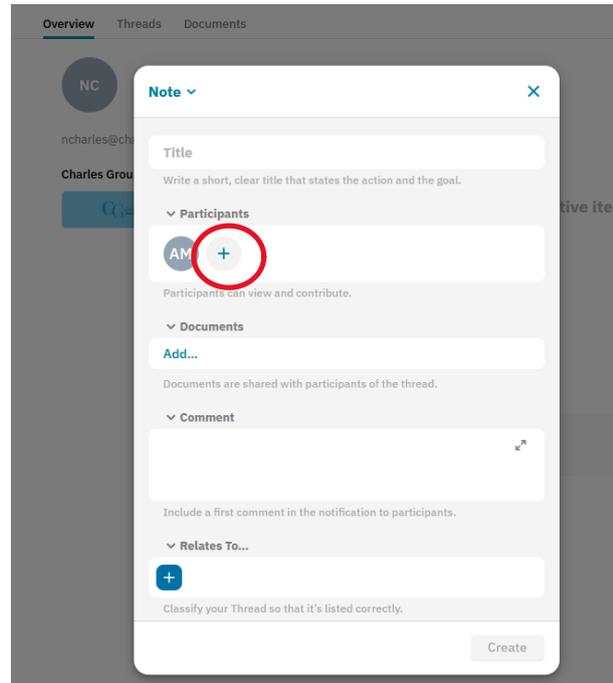
You will then get a pop up regarding what type of message you are sending. If you need something actioned by a certain date, use a **Task** and indicate a deadline. If you need us to sign something, use **Signature**. Otherwise, just use **Note**.



This will open a screen much like an email.

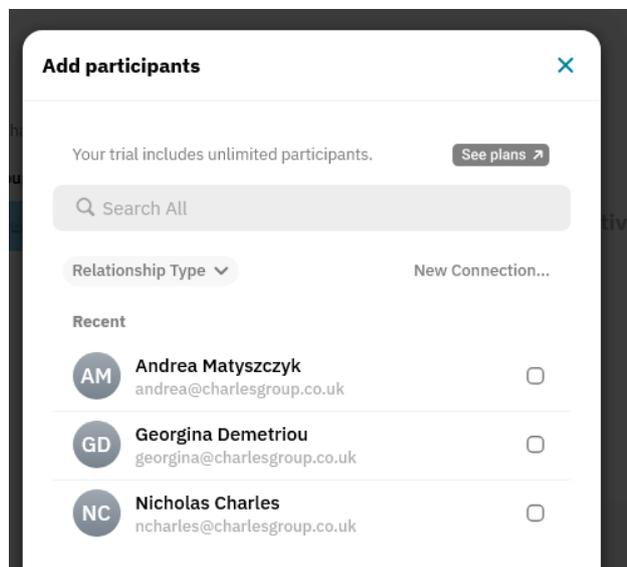
Add an appropriate title (you can't send anything without a title).

You will then need to add **Participants**, or **Connections** by clicking on the **+** sign.

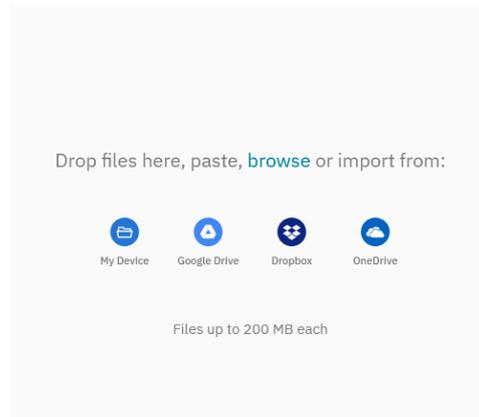
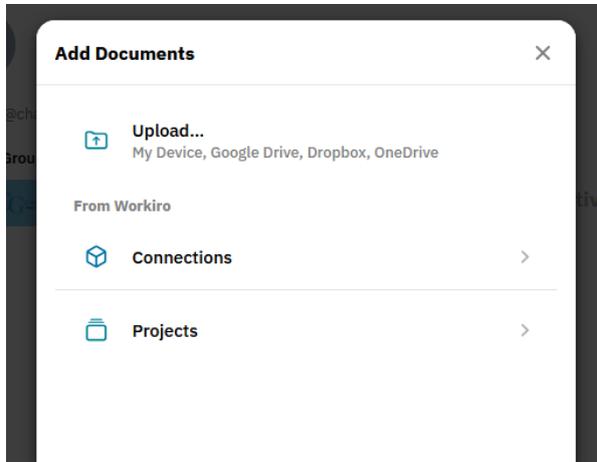


You will see a list of people who have previously sent you messages so you can simply tick the box next to the name you want.

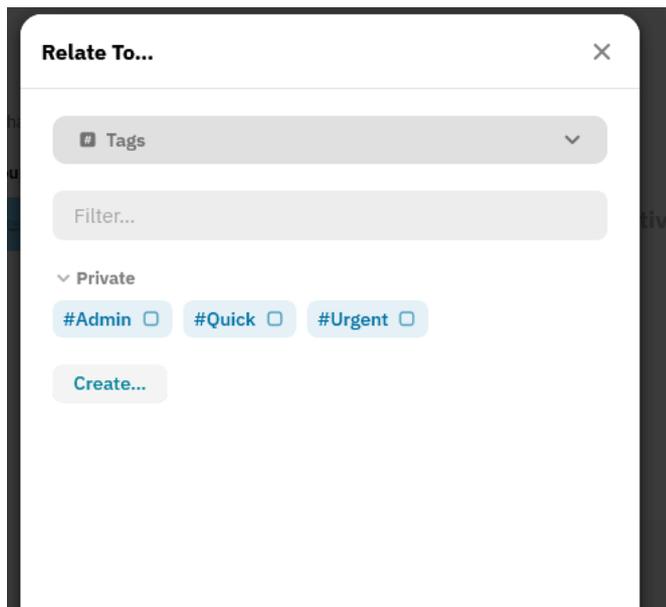
If you need to add someone new, click on New Connection and add the name and email address.



Once that's done, you can upload your documents.



You can also add Tags under **Relates To** so that you can easily find your documents again.



Add any message that you want in the Comment section and you're ready to go. Click Create to send.

Note v X

Personal Tax documents

Write a short, clear title that states the action and the goal.

Participants

AM AM +

Participants can view and contribute.

Documents

202603_The+Real+Enemy_UK

Add...

Documents are shared with participants of the thread.

Comment

add cover note ↵

Include a first comment in the notification to participants.

Relates To...

Andrea Matyszczvk

Create