



## User Manual - Guide

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# 1. Introduction

Welcome to OnePlaceSafe, a secure and efficient solution for managing your personal and organizational data. This manual will guide you step-by-step through each feature, ensuring you can use the platform effectively and efficiently.

## Target Audience

- End User

## 2. Getting Started

### 2.1 System Requirements

Before using OnePlaceSafe, ensure your system meets the following requirements:

- Web Browser: Latest versions of Chrome, Firefox, Safari, or Edge
- Internet Connection: Stable broadband or 4G/5G

### 2.2 Accessing the Application

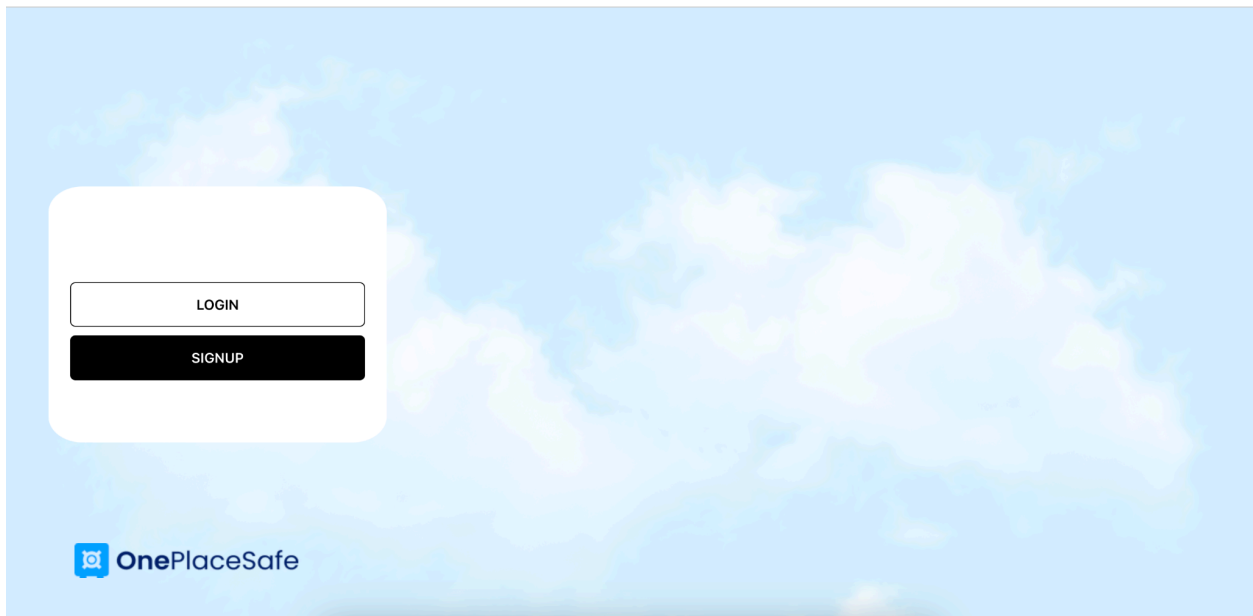
1. Open your browser and visit: <https://dev-web.oneplacesafe.com/>
2. Log in using your registered email and password or sign up for a new account.
3. Once logged in, you will be directed to the dashboard where you can access all core features.

## 2.3 User Registration and Login

### User Registration

#### Step 1: Navigate to the "Sign Up" Page

To get started, visit the homepage of our platform. Locate the "**Sign Up**" button, prominently displayed on the landing page. Click on it to be redirected to the registration form. The "Sign Up" page is designed to make your onboarding process smooth and intuitive, ensuring you can quickly create an account.



#### Step 2: Enter Your Details

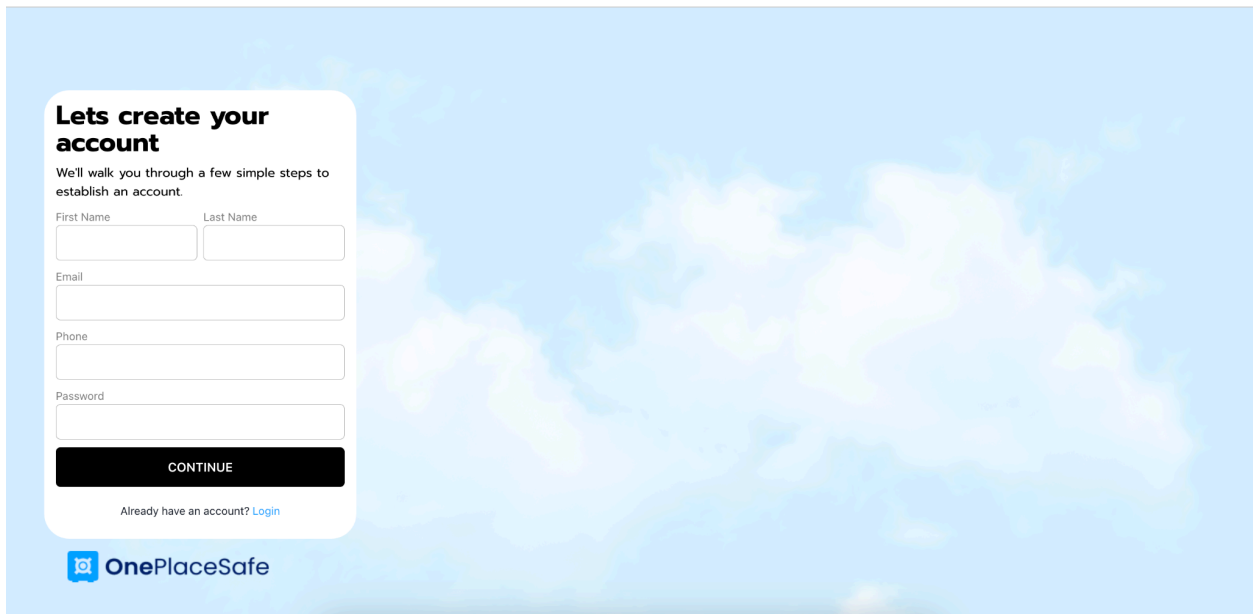
On the "Sign Up" page, you'll find fields asking for your **name**, **email**, and **password**.

- **Name:** Enter your full name as you'd like it to appear on your account.
- **Email:** Provide a valid email address that you frequently use; this will be essential for account activation and future communications.

- **Password:** Choose a secure password that meets our security criteria (minimum 8 characters, including a mix of uppercase letters, lowercase letters, numbers, and special characters). This ensures your account is well-protected.

Double-check all the details before clicking the **"Submit"** or **"Next"** button to proceed.

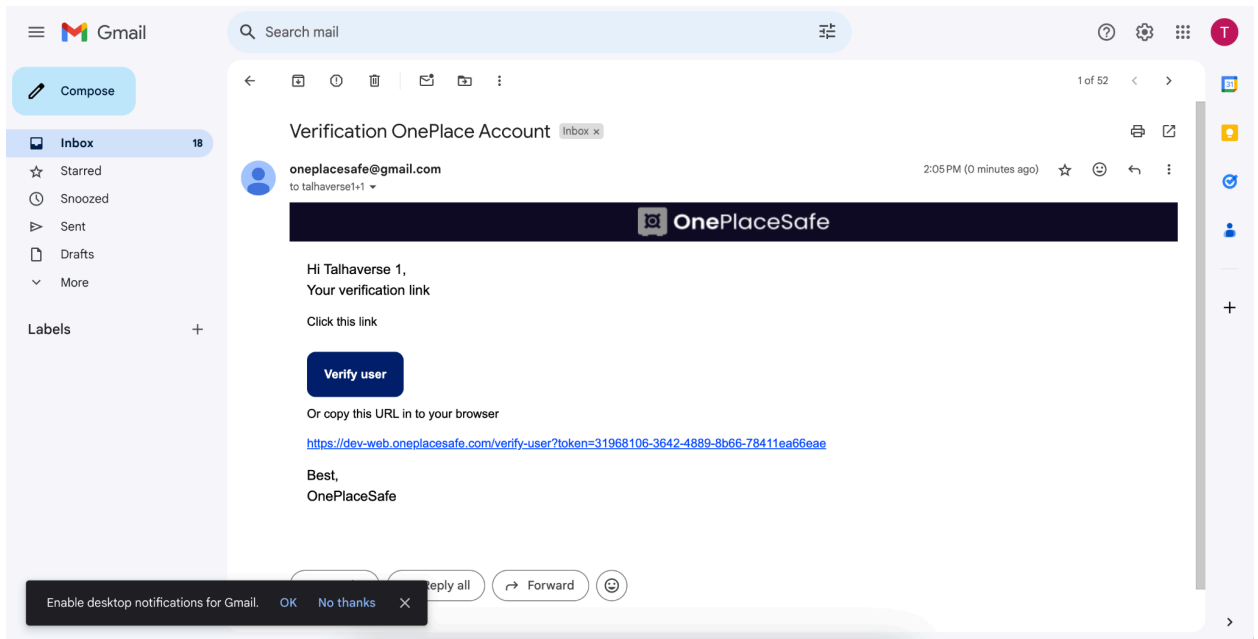
- **Phone Number:** Enter a valid phone number.

A screenshot of a web form titled "Lets create your account" on a light blue background with a cloud pattern. The form is white with rounded corners and contains the following fields: "First Name" and "Last Name" (two small input boxes), "Email" (one large input box), "Phone" (one large input box), and "Password" (one large input box). Below the fields is a black button with the text "CONTINUE" in white. At the bottom of the form, there is a link that says "Already have an account? Login". The OnePlaceSafe logo is visible at the bottom left of the form area.

### Step 3: Complete Email Verification

After submitting your details, check the email inbox of the address you registered. You will receive an email from our platform with the subject line **"Activate Your Account"** or something similar.

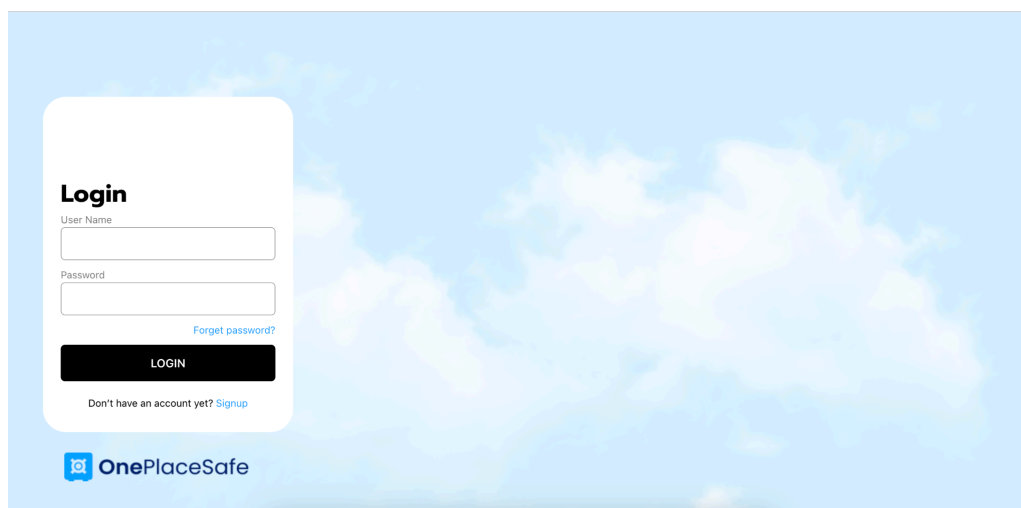
- Open the email and click on the verification link provided. This will confirm your email address and activate your account.
- If you don't see the email in your inbox, check your spam/junk folder or click on the **"Resend Verification Email"** option on the website. This crucial step ensures your account is secure and ready for use.



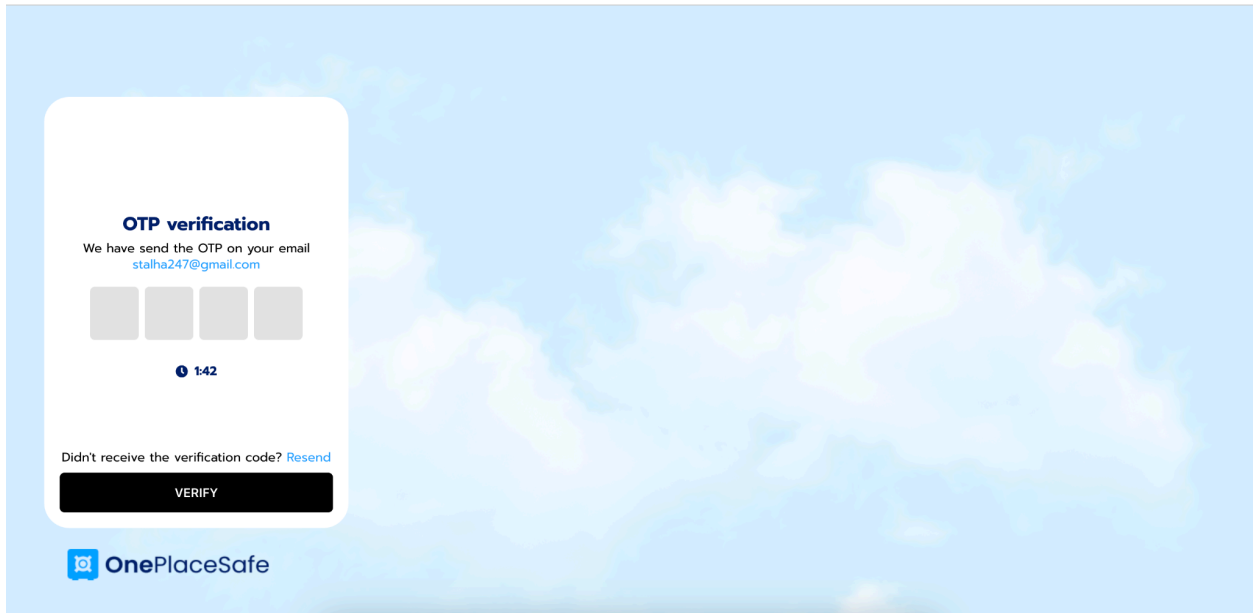
## Step 4: Log In to Access the Dashboard

Once your account is activated, return to the website's homepage and click on the "Log In" button.

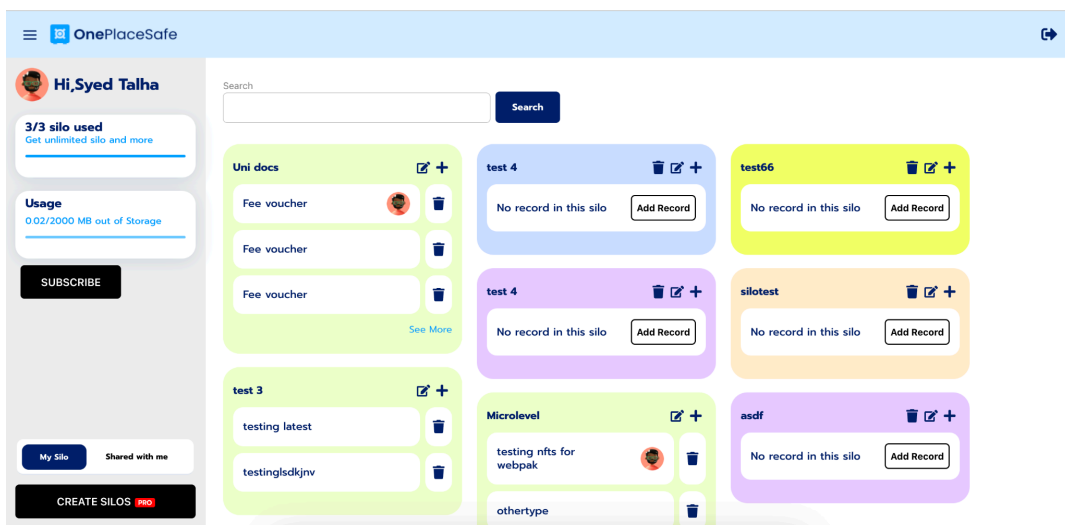
- Enter the email address and password you used during registration.



- Complete two-factor authentication if enabled. A code will be sent on the email, enter within the time limit given.



- Click on **"Log In"** or press Enter.  
If your credentials are correct, you'll be redirected to your personalized dashboard, where you can explore all the features and tools available. Should you encounter any issues,



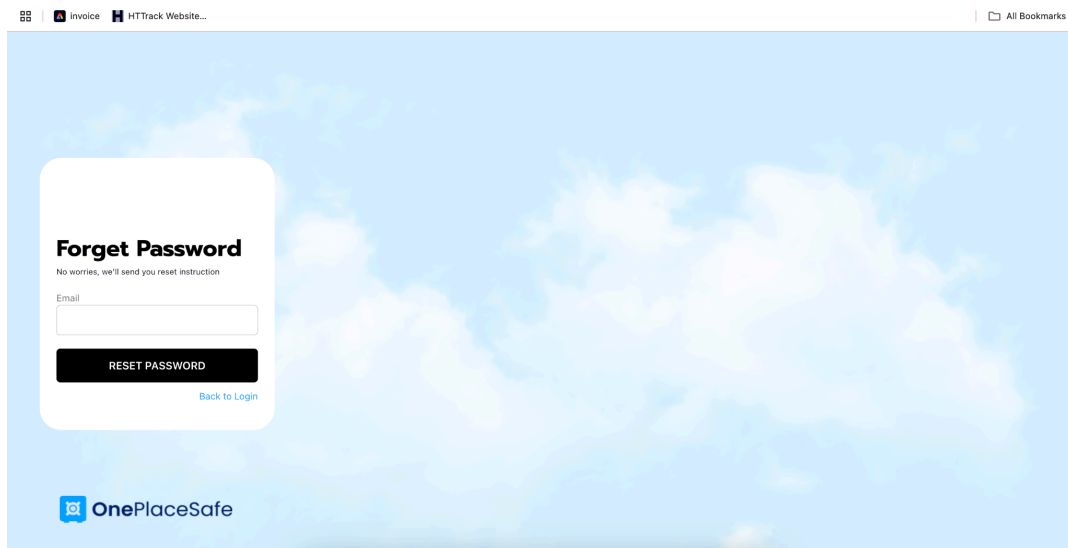
- Forget Password

### Step 1: Click "Forgot Password"

On the login page, if you can't remember your password, don't worry! Simply click the **"Forgot Password"** link located beneath the login form. This feature is designed to help you regain access to your account securely and efficiently.

### Step 2: Enter Your Registered Email Address

You will be redirected to the password recovery page, where you'll need to enter the **email address** associated with your account. Double-check your entry to ensure it's accurate, as the reset instructions will be sent to this email address.



### Step 3: Check Your Email Inbox for the Reset Link

After submitting your email address, check your inbox for a password reset email from our platform. The email will contain a subject line like **"Password Reset Request"** or similar. If you don't see the email within a few minutes, be sure to:

- Check your **spam/junk** folder.
- Use the **"Resend Email"** option on the password recovery page if needed.

The email will include a secure link to reset your password. For security reasons, this link will only remain active for a limited time.

## Step 4: Follow the Instructions to Create a New Password

Click the link in the email to be taken to the password reset page. Here, you can create a **new password** that meets our security guidelines:

- Use at least **8 characters**.
- Include a mix of **uppercase letters, lowercase letters, numbers, and special characters** for maximum security.

Confirm the new password by re-entering it in the designated field, then click **"Reset Password"**. Once updated, you'll receive a confirmation message.

## 2.4 Subscription Management

### Step 1: Navigate to the "Subscription" Section

After logging into your account, locate the **"Account Settings"** menu, typically found in the navigation bar or your profile dropdown menu. Within this menu, click on the **"Subscription"** tab to access the subscription management area. This section is designed to provide you with all the information about our available plans and ensure a seamless subscription process.

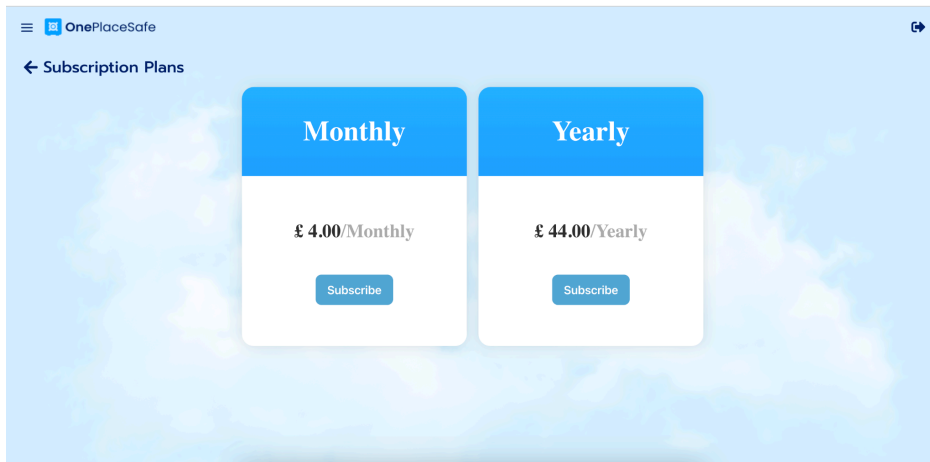
### Step 2: Choose a Subscription Plan

On the "Subscription" page, you'll find two flexible plans tailored to meet your needs:

- **Monthly Plan:** Priced at **£4 GBP** per month, ideal for users looking for short-term access with the flexibility to cancel or upgrade anytime.
- **Yearly Plan:** A cost-effective option priced at **£44 GBP** per year, offering savings equivalent to two free months compared to the monthly plan.

Each plan grants full access to all features and ensures you get the most out of our platform. Take a moment to review the details of each plan before selecting the one that best aligns with your requirements.





### Step 3: Enter Payment Details and Confirm Your Subscription

Once you've chosen your desired plan, click on the **"Subscribe Now"** button. You will be redirected to our secure payment gateway powered by **Stripe**, a trusted global platform for online transactions.

- **Stripe Checkout:** Stripe provides a highly secure environment for your payment. Your information is encrypted, ensuring safety and privacy.
- Enter your payment details, including your card information, and confirm the transaction.

After successful payment, your subscription will be activated immediately, and you will receive a confirmation email with the details of your plan.

OnePlaceSafe TEST MODE

Subscribe to Subscription  
**£4.00** per month  
Subscription

Pay with card

Email stalha247@gmail.com

Card information  
1234 1234 1234 1234  
MM / YY CVC

Cardholder name  
Full name on card

Country or region  
Australia

Subscribe

By confirming your subscription, you allow OnePlaceSafe to charge you for future payments in accordance with their terms. You can always cancel your subscription.

Powered by stripe | Terms | Privacy

## Step 4: Flexibly Manage Your Subscription

We understand your needs may change, so we've made it easy to manage your subscription:

- You can **upgrade** to a yearly plan at any time to enjoy long-term savings.
  - Similarly, you can **downgrade** to the monthly plan if needed.
- All changes to your subscription will be pro-rated, ensuring fairness and transparency. These options can be accessed in the "Subscription" section of your account.

### Why Choose Our Plans?

- **Affordability:** Whether you prefer monthly flexibility or yearly savings, our plans are designed to offer value.
- **Security:** Payments are processed through Stripe, a world-class secure payment platform.
- **Full Access:** Both plans provide unrestricted access to all features and services.

Start your subscription today and enjoy uninterrupted access to everything our platform has to offer.

**We also have a free tier in which you can create upto 3 silos and add upto 3 records in each silo.(By Default)**

## 3. Core Features and Step-by-Step Guides

### 3.1 Creating Silos

#### Step 1: Access the "Create Silo" Section

Log in to your dashboard and navigate to the "**Create Silo**" section. This area is dedicated to managing and organizing silos effectively, allowing you to centralize and customize your data for streamlined management.

## Step 2: Click "Create New Silo"

In the "Create Silo" section, locate the **"Create New Silo"** button. Clicking this will initiate the setup process for a new silo. This intuitive process ensures you can easily add and personalize silos as needed.

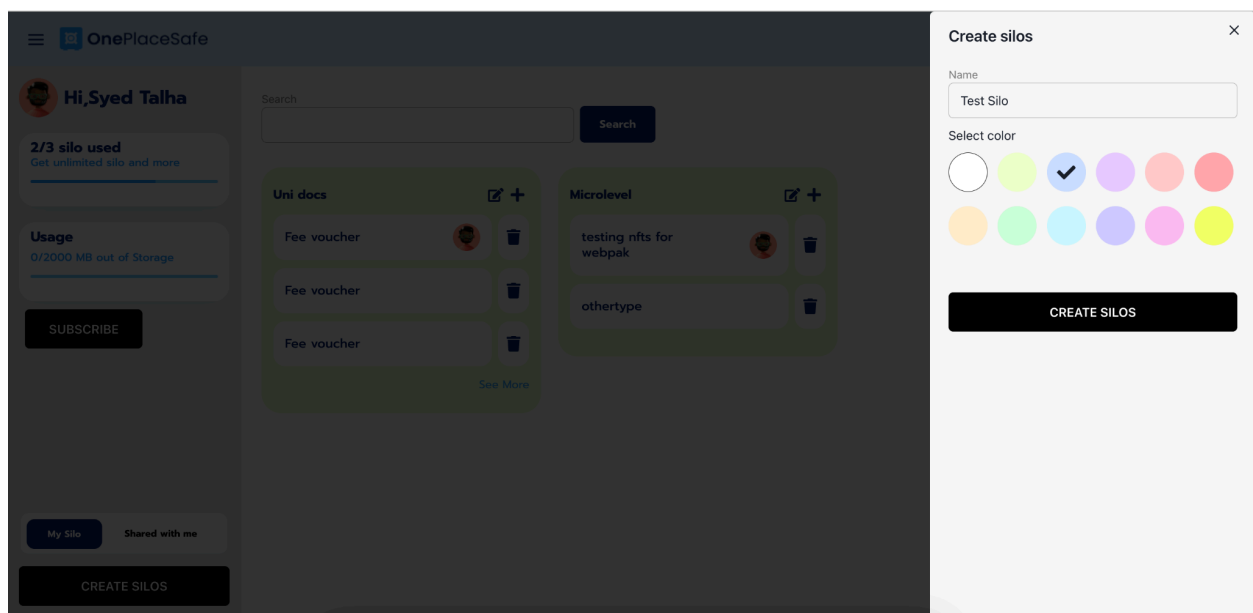
## Step 3: Define the Silo Name and Description

A pop-up or form will prompt you to enter:

- **Name:** Choose a clear and descriptive name for your silo to easily identify its purpose or content.
- **Description:** Provide a brief explanation of what this silo will contain. This is particularly useful for providing context or for team members collaborating on the silo.

## Step 4: Set a Distinctive Color

Assign a unique **color** to your silo. This visual cue helps distinguish one silo from another at a glance, enhancing organization and usability, especially when working with multiple silos.



## Step 5: Add a Record to the Silo

Once the silo is created, you can start adding records to it. Navigate to the silo you just created, and:

- Click the **"Add Record"** button.
- Enter the details for the record, ensuring the information is accurate and aligns with the silo's purpose.(In DOC format)

Adding records allows you to populate the silo with meaningful data, making it functional and ready for use.

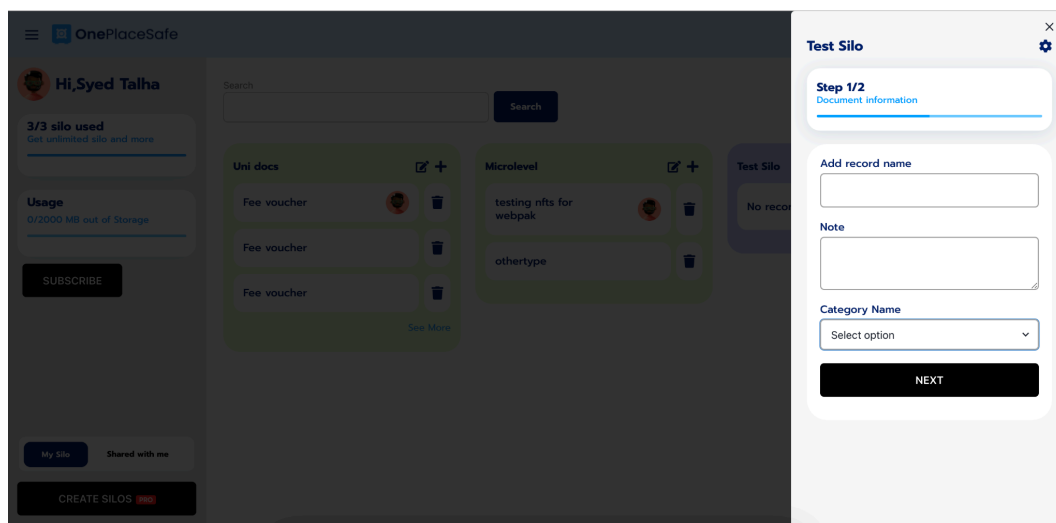
## Step 6: Attach Notes to the Record

For every record added, you have the option to include **notes**. These notes can:

- Provide additional context or background information.
- Document insights, updates, or reminders related to the record.
- Ensure clarity and completeness for team collaboration.

Simply click on the **"Add Notes"** option next to the record and input your text.

7. Select category of the record (i.e: legal , financial).



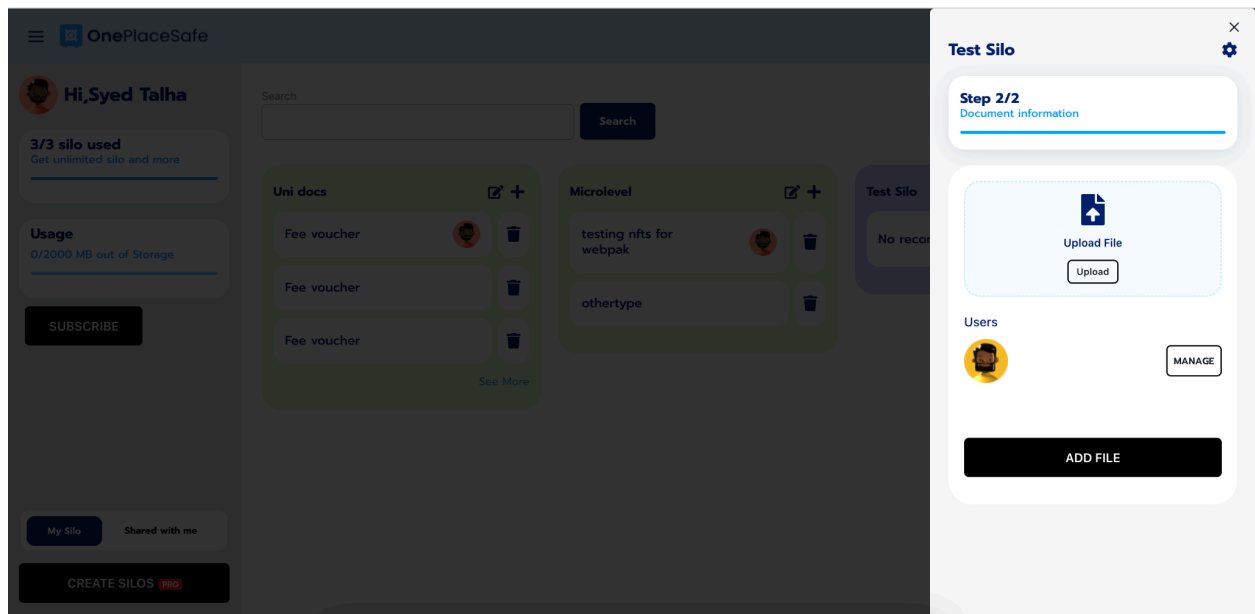
## 3.2 File/Doc Management

### Step 1: Navigate to Step 2 in the "Add a Test Silo" Flow

Begin by accessing the **"Add a Test Silo"** flow in your dashboard. Progress to **Step 2** of this flow, where you'll find options for managing and organizing files or documents associated with the silo. This step is designed to enhance your silo by attaching relevant resources.

### Step 2: Click "Upload" to Add a File

In Step 2, locate the **"Upload"** button. Clicking this button will open the file uploader interface, enabling you to seamlessly add documents, images, or other files to the silo. This ensures all related materials are stored in one place for easy access.



### Step 3: Select the File from Your Device

A file selection window will appear, allowing you to browse through your device's storage.

- Navigate to the folder containing the file you wish to upload.

- Select the file and click **"Open"** or **"Upload"** (depending on your system). The file will be uploaded to the silo, where it will be stored and displayed as part of the silo's records.

#### **Step 4: Use the Search Bar to Locate Files Quickly**

As the number of files grows, finding a specific document might become challenging. To streamline this process, use the **search bar**:

- Enter the name or keywords related to the file you're looking for.
- The system will filter and display matching results, saving you time and effort. This feature ensures that even with extensive documentation, you can quickly access what you need without manually browsing through all files.

### **3.3 Sharing Documents with Family**

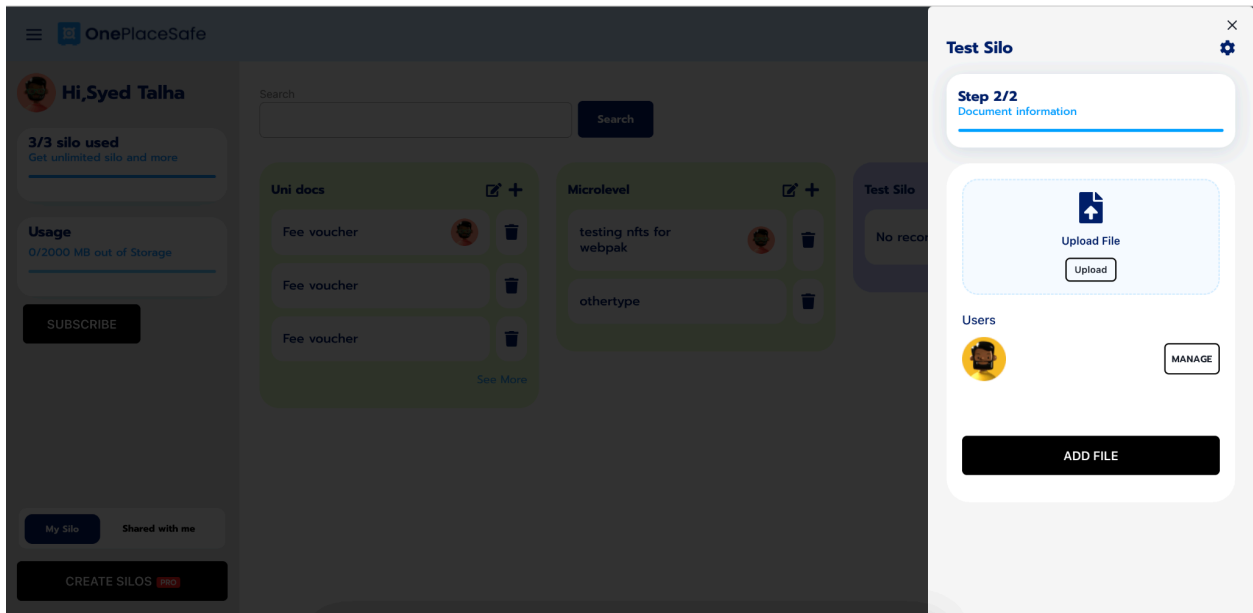
#### **Step 1: Select the Record You Wish to Share**

Log into your account and navigate to the silo containing the document you want to share. Browse through the records and select the specific one that includes the document. This ensures that you're sharing the correct file with the intended recipient.

#### **Step 2: Click "Manage" and Enter the Recipient's Email Address**

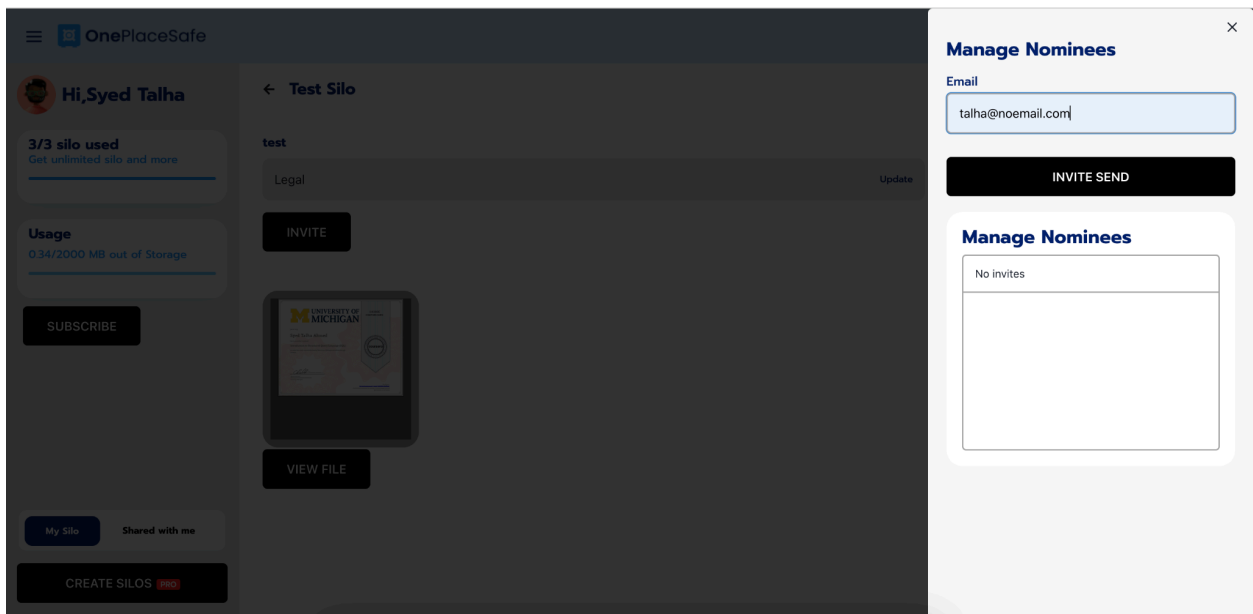
Within the selected record, click on the **"Manage"** button. This action will open the sharing interface.

- Enter the recipient's **email address** in the designated field.
- Double-check the email for accuracy to ensure the document reaches the right person



### Step 3: Set Permissions

To maintain control over your document, set the permissions to **"View Only"**(By default). This ensures the recipient can access and view the file but cannot make changes or download it, preserving the document's integrity.



## Step 4: Click "Send"

Once all details are verified, click the **"Send"** button. The system will generate a secure link and send it to the recipient's email address.

- The email will include instructions and the secure link for accessing the document.
- This ensures that only the intended recipient can view the file.

## Step 5: Access via the "Shared With Me" Tab

The recipient can log into the web app and find the document under the **"Shared With Me"** tab. This tab serves as a central location for all files shared with them, making it easy to access and organize shared documents.

## 3.4. Shared with Me Tab

### Step 1: User Can Only View the Document

When a document is shared, the recipient can access it in the **"Shared With Me"** tab of the web app. The permissions are set to **View Only**, meaning:

- The user can view the document but cannot download, edit, or share it further.
- This ensures the document's integrity and safeguards sensitive information.

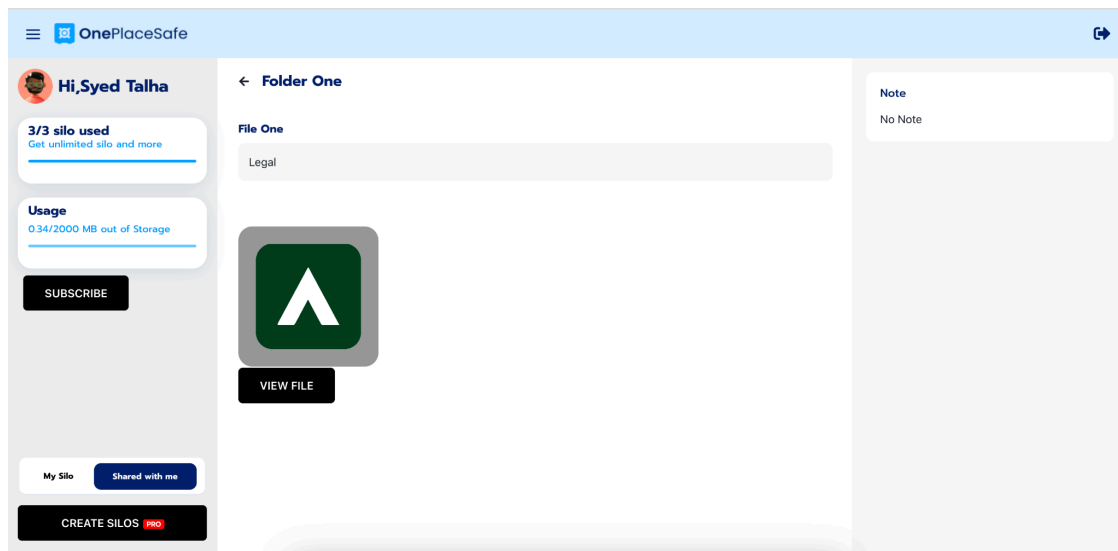




## Step 2: Associated Notes Are Also Visible

If the shared document has any **associated notes**, these will also be displayed alongside the document in the **"Shared With Me"** tab.

- **Notes** provide additional context or details related to the document.
- Recipients can read these notes to better understand the document's purpose or any related instructions.



## Key Features of the "Shared With Me" Tab

- **Organized Access:** All shared documents are listed neatly, making it easy for users to find what they need.
- **Contextual Information:** Associated notes ensure users have all relevant information at their fingertips.
- **Secure Viewing:** Documents are protected by permissions, ensuring they are only accessible in a controlled environment.

## 5. Frequently Asked Questions (FAQs)

- How to contact support? Use the "Help" section on the dashboard.
- What to do if your subscription expires? Renew through the "Subscription" section.
- Can I recover deleted files? Use the "Trash" feature in the "Files" section to recover recently deleted items.

## 6. Contact Support

For assistance, contact us via:

- Email: [support@oneplacesafe.com](mailto:support@oneplacesafe.com)