

## MANUAL ONLINE DOSSIER

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## 1. Introduction

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You will receive this manual because you have received documents through our office through a secure online portal. This “Online Dossier” has been placed in a secure environment. This platform is part of Van Brug Software, the largest supplier of notarial software in the Netherlands and was developed partly in consultation with our office.

Through this guide you will get more information about how you can work with your Online Dossier.

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## 2. CREATE AN ACCOUNT AND LOG IN

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### 2.1 THE ACCOUNT

You cannot create an account yourself on the Online Dossier platform; this is done by our office. You have already provided or have yet to provide your e-mail address and mobile phone number to our notary office: this information is necessary to create an account.

### 2.2 LOGIN

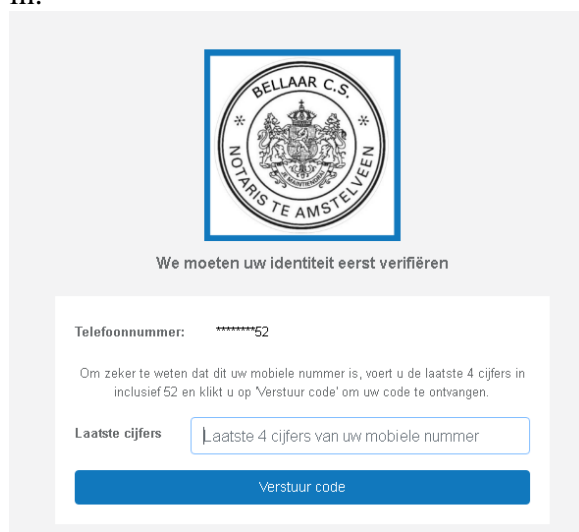
After an account has been created by our office and documents have been prepared for you, you will receive an e-mail from our office. The content of the message will be approximately as follows:

" New documents are waiting for you.

You can log in via the following link to see all documents: [link to your online file.](#)"

We recommend that you keep the email sent with a link. With this link you can log in to all files made available by our office and you can log in several times.

For security reasons, this e-mail does not contain any substantive information. After clicking on the link, you will be redirected to the Online Dossier". An authentication will take place here first. The last 2 digits of your mobile number are shown here, you must then enter the last 4 digits of your number including the figures already shown, after which you will receive an SMS with a verification code with which you can log in.



We moeten uw identiteit eerst verifiëren

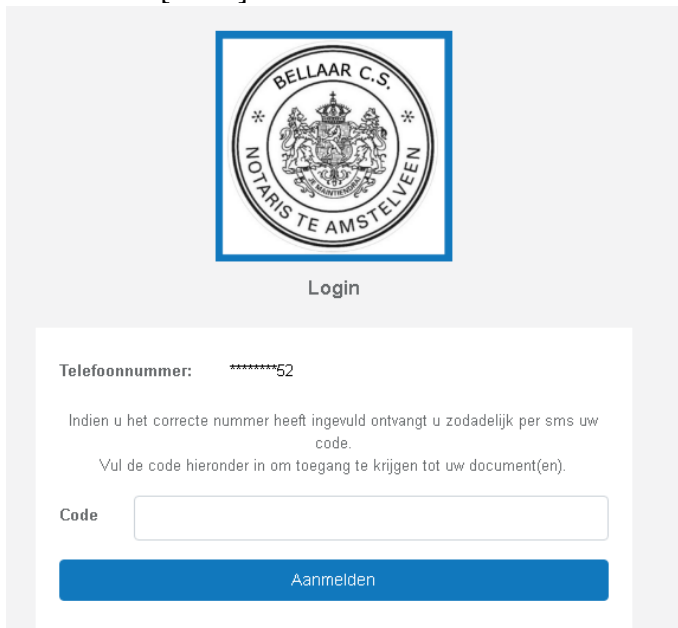
Telefoonnummer: \*\*\*\*\*52

Om zeker te weten dat dit uw mobiele nummer is, voert u de laatste 4 cijfers in inclusief 52 en klikt u op 'Verstuur code' om uw code te ontvangen.

Laatste cijfers

[Verstuur code](#)

After entering the correct number, you will receive an SMS code that you can then enter under [Code]:



Telefoonnummer: \*\*\*\*\*52

Indien u het correcte nummer heeft ingevuld ontvangt u zodadelijk per sms uw code.

Vul de code hieronder in om toegang te krijgen tot uw document(en).

Code

Aanmelden

After this you are logged in to your “Online dossier”.

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### 3. YOUR ONLINE DOSSIER

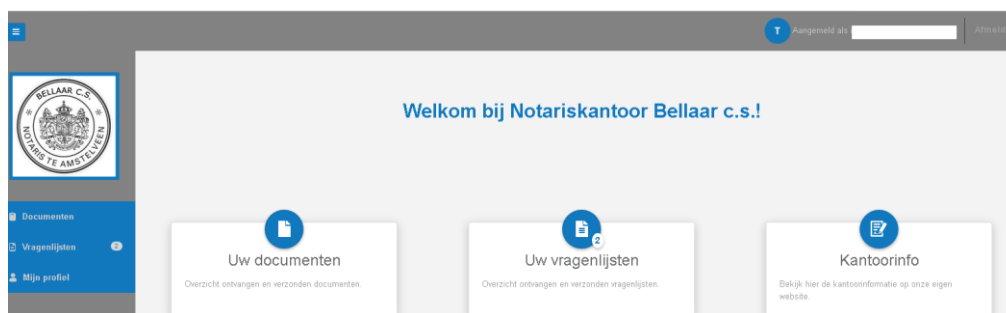
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After you are logged in, you will be shown in the main screen. The number of available documents and/or questionnaires is visible here.

Under [Uw documenten] the documents available to you have been prepared for you and you can send secure documents to our office.

Under [Uw vragenlijsten] the questionnaires you (if any) will be prepared.

The figure that is in [Uw documenten] or [Uw vragenlijsten] indicates whether and how many documents have been made available to you.

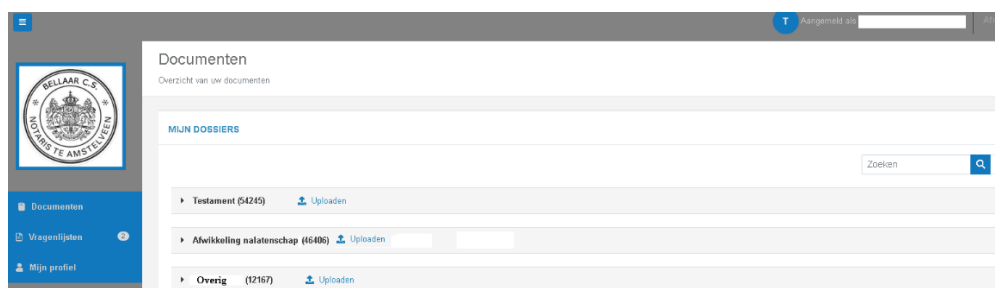


### 3.1 DOCUMENTS

Under [Uw documenten] you can find an overview of the files available to you. The name of the file and the file number are visible.

By clicking on the file name, all available documents in the relevant file are made visible to you.

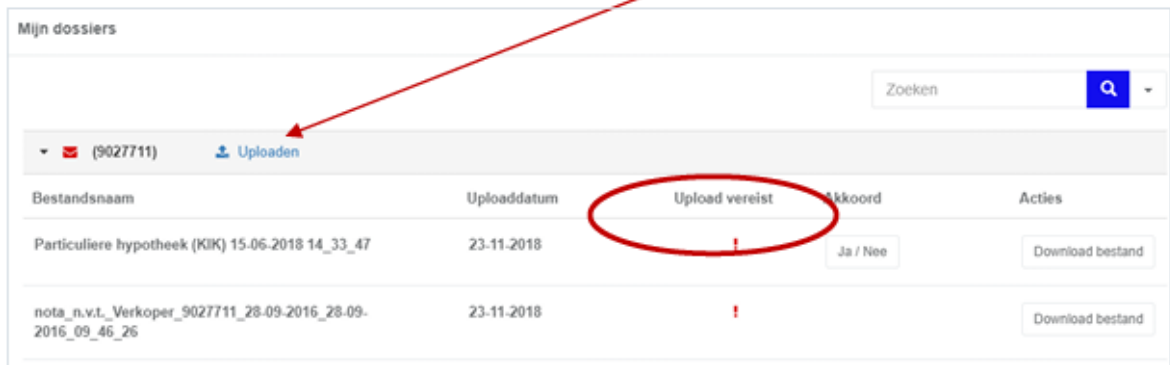
In this document overview you have the option to download the documents and then view them, print them or save them locally. You also have the possibility to search for documents.



#### 3.1.1 UPLOADEN DOCUMENT

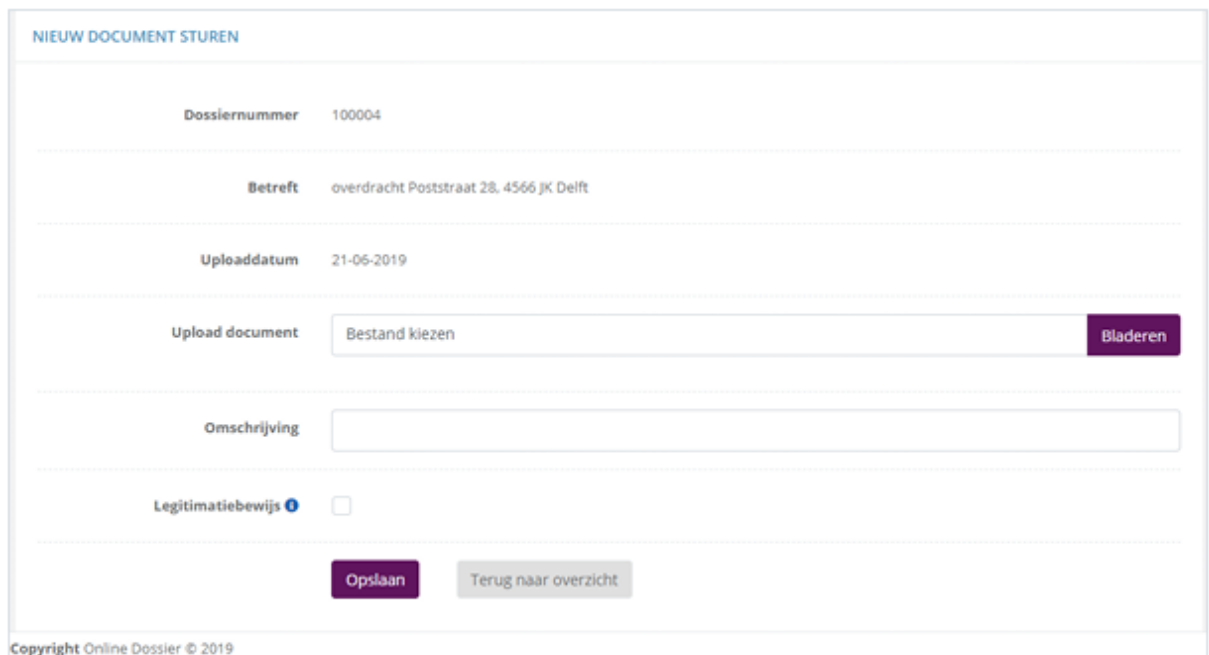
By clicking on the [Uploaden] button behind the relevant file, you can send secure documents to our office. The document will then be immediately visible to the practitioner of the relevant file.

You can get a request from our office to upload a document. This can be, for example, an ID. If an upload is required, there will be a red exclamation point under [Upload vereist]. You can then upload the document you want using the [ [Uploaden] button.



Bestandsnaam	Uploaddatum	Upload vereist	Verkoop	Acties
Particuliere hypotheek (KIK) 15-06-2018 14_33_47	23-11-2018	!	Ja / Nee	Download bestand
nota_n.v.t._Verkoper_9027711_28-09-2016_28-09-2016_09_46_26	23-11-2018	!		Download bestand

You will then end up in the following screen:



**NIEUW DOCUMENT STUREN**

Dossiernummer: 100004

Betreft: overdracht Poststraat 28, 4566 JK Delft

Uploaddatum: 21-06-2019

Upload document: Bestand kiezen Bladeren

Omschrijving:

Legitimatiebewijs

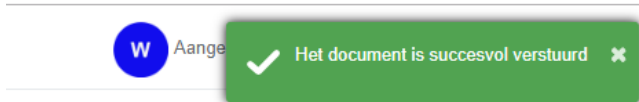
Opslaan Terug naar overzicht

Copyright Online Dossier © 2019

Enter the requested information here and select the file you want from [Bestand kiezen].

If it is a proof of identity, you still need to check the box [legitimatiebewijs]. Please note: each client has his/her own “Online Dossier”. If you wish to add the ID of, for example, your partner, we ask you to send the ID via his/her own “Online dossier”, or not to check the "ID" box. The ID will otherwise be linked to your personal data.

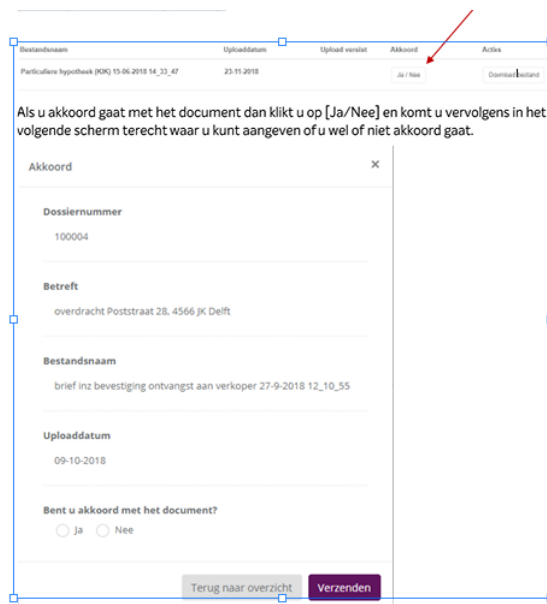
If all the data is filled in correctly and the correct file is selected, choose [Opslaan]. Right at the top of your “Online dossier” you will then be notified that the document has been sent successfully.



The documents that you have sent to our office via the upload button will then also be visible under the relevant file. In this way, the “Online dossier” can also act as a “digital vault” for you.

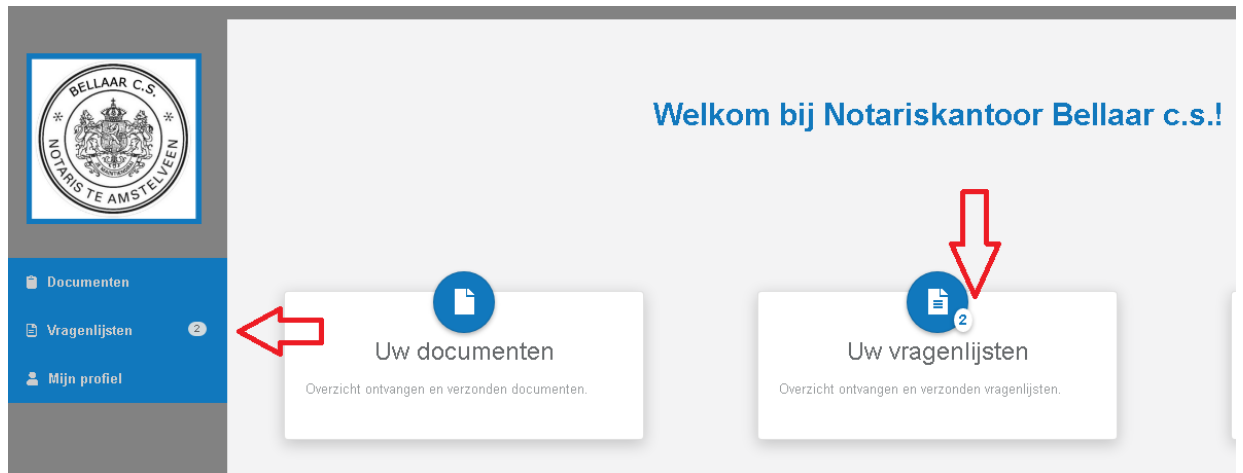
### 3.1.2 APPROVING DOCUMENT

You can receive a request from our office to approve a document. If applicable, you will see a [Ja/Nee] screen under [Akkoord] behind the relevant document. After you click on [Verzenden] your agreement or rejection will be sent to our office. In the event of a rejection, we ask you to state the reason for rejection.



### 3.1 QUESTIONNAIRES

You may receive a request from our office to complete a questionnaire. You have received a message stating that documents have been added to your “Online dossier”. If you are logged in to your “Online dossier”, you will see that a message has been received under questionnaires under the [Vragenlijsten] button on the left side of the screen. You can also see this in the home screen if there is a number behind the start button [Vragenlijsten].



If you click on [Vragenlijsten], the screen with the sent questionnaires will open. Under [Acties] in this screen you will see that there is a request [Invullen] on the Questionnaires screen.

#### Vragenlijsten

Overdracht X (12167)				
Naam	Aanmaakdatum	Verstuurd op		Acties
Onroerend goed	22-05-2019			<input type="button" value="Invullen"/>

You then click [Invullen] en the questionnaire opens. The first part of the questionnaire consists of your personalities that you can fill in here or make adjustments to them.

To move to the next part of the questionnaire, click [Volgende] and then you can complete the next part of the questionnaire.

#### Add documents

It is possible that the questionnaire asks for a document to be sent as evidence. You can add this document by clicking [Bladeren] on the question in question. This way, you can add the document. If you found the file you want, select it and add it to the questionnaire.

#### Not all data available?

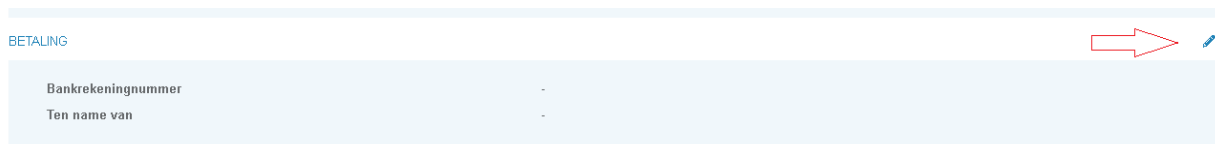
You can always complete the questionnaire in between and complete the questionnaire at a later date. It is possible to skip certain questions in the first instance and supplement them at a later date.

#### Control screen

If the questionnaire is completed in full, you will enter a control screen. Here all questions and answers are displayed again.



You can then go even further with filling or changing the answers of the questionnaire by clicking on the "pencil" in the relevant category.



### Send

If the questionnaire is completed in full, choose [Verzenden]. Once you have sent the questionnaire, you will no longer be able to make adjustments to the questionnaire and you will also see that the status of the questionnaire under [Acties] has changed to [Inzien]. You can still view the questionnaire you sent. The completed data will only become visible at our office once you have clicked on [Verzenden].

Please note that if you have been asked to complete a questionnaire, the questionnaire must always be sent in full in time before signing the deed.

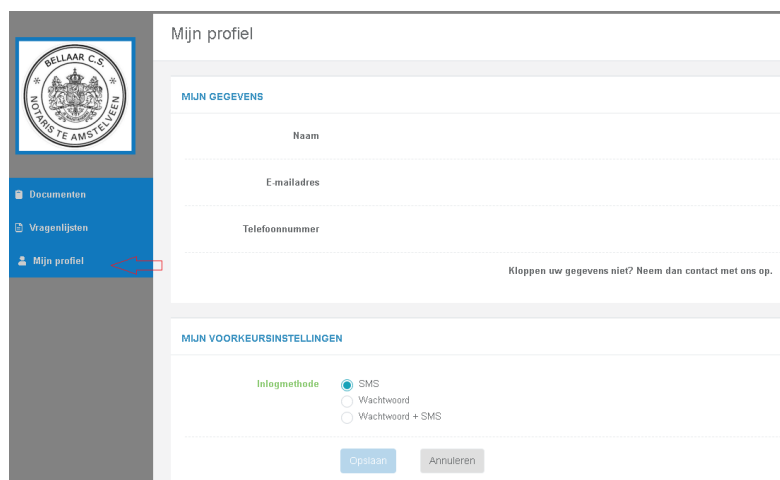
## 4. MY PROFILE

Under [Mijn Profiel] you can view your registered data and you can set your preference for logging into your “Online dossier”.

You can choose from:

- Sms
- Password
- Password + SMS

In the “Online dossier” it is possible to log in with a password instead of with an SMS. You will then need to log in with a text message once and then go to [Mijn profiel]. There you can adjust the preferences regarding the login. This may be desirable, for example, if you want to work with a password in your organization. You can send the password to your desired colleagues.



## 5. OPT OUT

If you no longer need to submit documents or submit questionnaires, you must opt out. You can do this via the unsubscribe button at the top right of the screen.

After you opt out, the following screen follows:

