MyDocSafe

Company Background

Docsafe Limited trading under the name MyDocSafe was founded by Daniel Stachowiak in December 2013 with a view to speeding up the client onboarding process and reduce administrative burden by digitising some of the labour- intensive processes within a professional practice as much as possible.

The EU's General Data Protection Regulation (GDPR) has applied from 25 May 2018, when it supersedes EU member state implementations of the 1995 Data Protection Directive (DPD). The UK Data Protection Act 1998 (DPA) will be superseded by a new DPA that enacts the GDPR's requirements.

The new law marks a wide-reaching and significant shift in the way that organisations must protect personal data.

MyDocSafe recognised the implications of the introduction of the new regulations and began developing not only a compliant product but also embarking on a series of training and awareness workshops to explain the GDPR regulations and how MyDocSafe works.

The Product

MyDocSafe is a cloud -based product, its main aim to assist Professional practices simplify the client on boarding process via the creation of forms, Workflows and E-signatures.

Registration/Setup

The registration / setup process is easy and once set up you can access the "account settings" by pressing on your name on the top right-hand side of the screen via a dropdown menu.

Account settings can be changed at any time and perhaps the most useful are: -

1. Email settings – allows emails to be sent direct to MyDocSafe.

2. Two factor authentication – for greater security.

3. Add-ons - where you can link to your Dropbox account or Xero Accounting software.
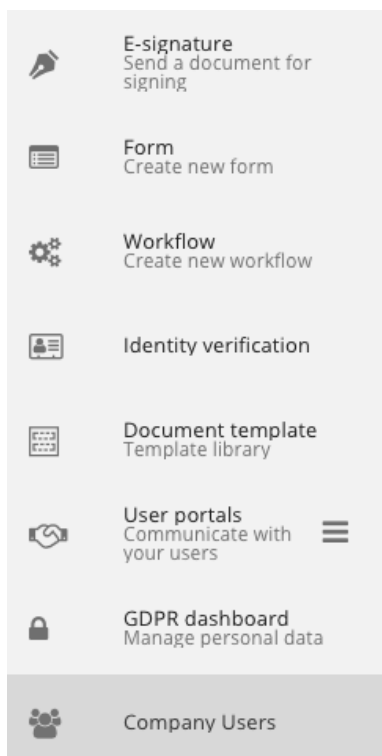
Dashboard / layout

Once you enter the product you are faced with a dashboard consisting of

- top banner bar

- side functions bar

- a large main window

Top Banner Bar

I initially set up the top banner bar which takes your website and email addresses from the information you entered at registration of the product. I then chose to upload an image of my logo on the left side of the business name. There is the facility using the small icons on the right-hand side of the banner to "Upload folder banner image" and "Upload a background image".
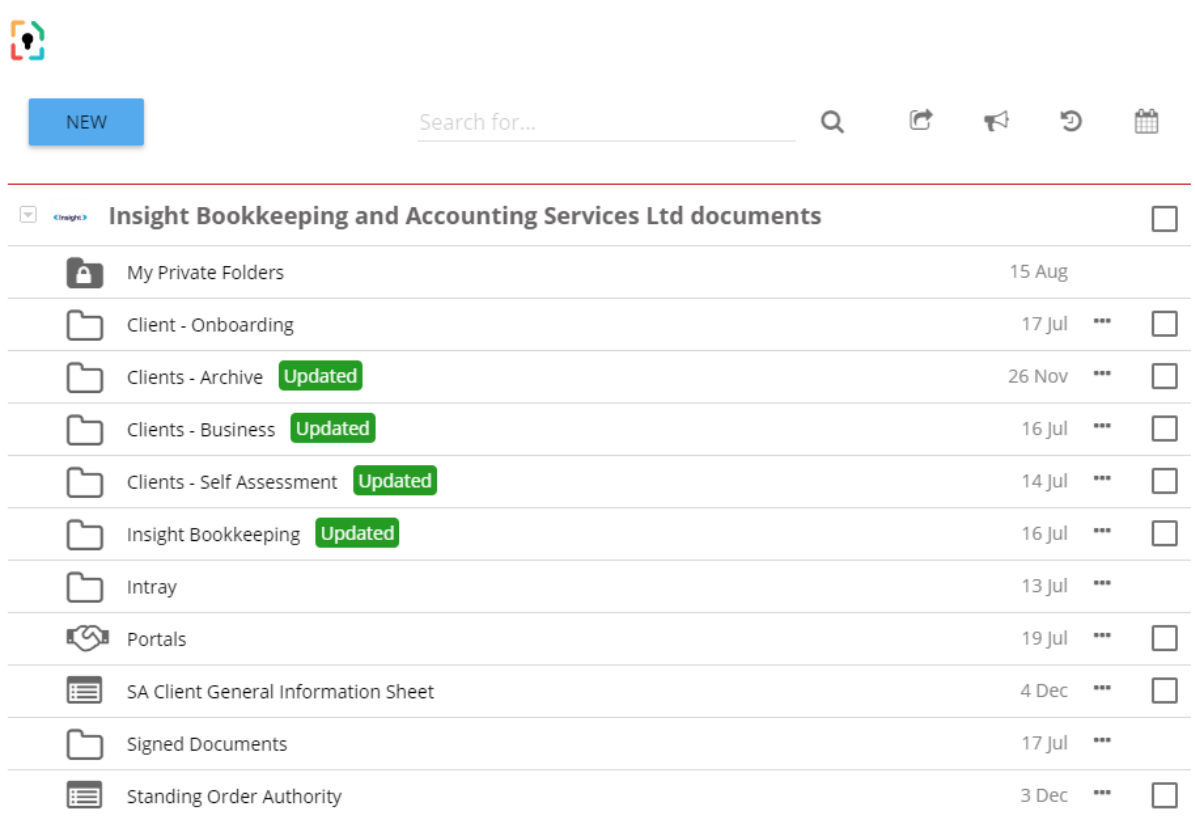
Side Functions Bar – Left side

The side functions bar gives various options as seen in the image.

We will come back to each function after looking at the final part of the dashboard.

Large Main window

This sets out the documents file structure, forms, client portals, forms and templates and a specific folder for signed documents and an in-tray where all emailed documents will be initially sent.

Pressing on the logo anywhere in the programme brings you back to this main view.

Any documents in the above snapshot , with the exception of the portals belong to the account owner and are shared with anyone else who has been given access.

First thoughts

Having met Daniel at one of his awareness workshops via an ICB Branch Meeting, where he emphasised the need to store files in an encrypted and secure way , my intital thoughts were to set up a folder structure to hold my clients key data in one place rather than using the various storage facilities such as One Drive , Dropbox (Personal Version) , Google drive and Windows file explorer which had developed over a number of years working.

I then thought that if the key documents were stored in MyDocSafe I could then set up client portals to share documents with my clients and also when I needed a signature on a document it would be an efficient way of getting a digital signature in order to file a return e.g, Self assessment or VAT return.

Initially I was less interested in the client on boarding process but could see how this could work should I have a new client prospect in the near future.

Using the folders and files structure

In the main documents window the big Blue button "New" gives access to a dropdown menu where you can choose from several options.
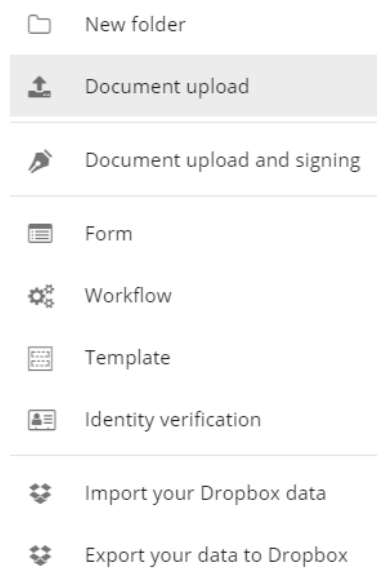
From this menu I started to use the new folder, document upload , Import to and export from Dropbox options

The "New folder" option took me to a simple dialog box where I could name the folder and save it. As you might expect it was placed in alphabetical order by name in the main folders dashboard. To access the folder I needed to double click on the folder name and this brought up another screen with several options.
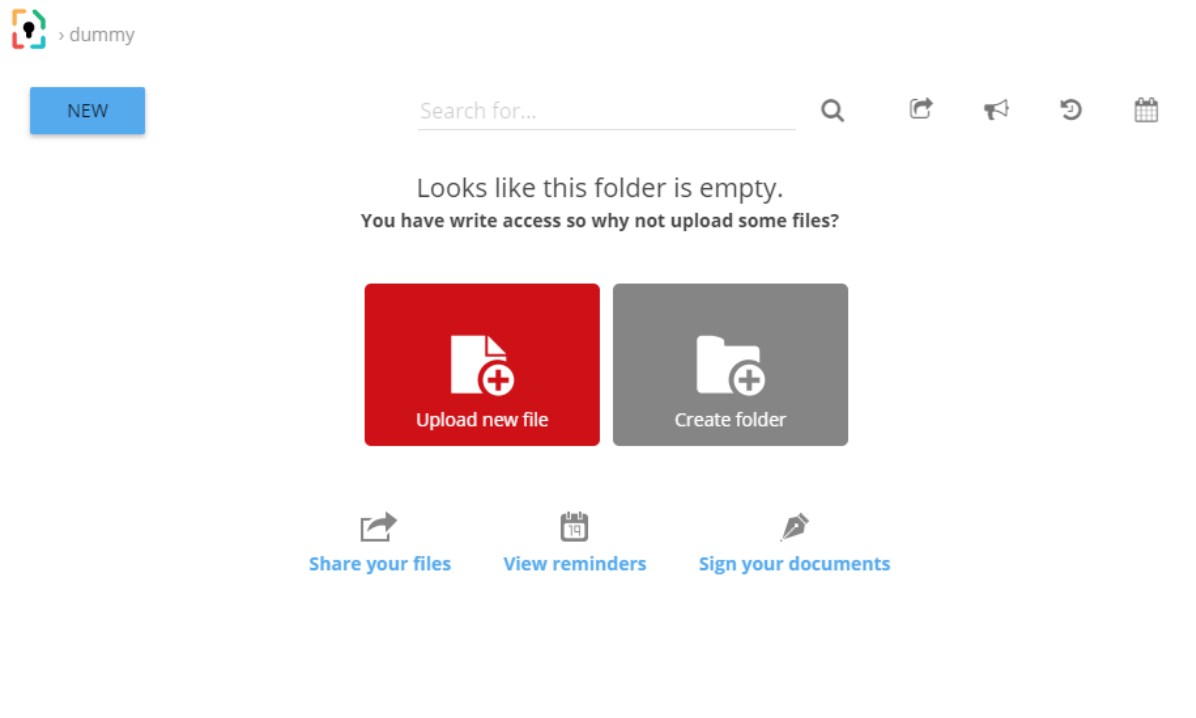
1. A "new" button which gave to the same options as before

2. The option to upload a file – this then allowed me to browse my computer documents to choose a file to upload

3. Create a folder – same as before but creates a sub folder

4. Share your files

5. View Reminders

6. Sign your documents

I experimented with setting up a series of folders for each client and the sub folders for key documents such as Year end accounts , VAT return, Payroll. Pressing the logo button then took me back to the main screen.

Once back at the main screen I could see the date when I created the folder, a tick box and a three dot symbol (Ellipse Button). Pressing on the button brought me to another dropdown menu of functions. With files in the folder this same menu appeared if I pressed the symbol next to a file.

⊕	Open
↱	Share
▯	Registered delivery
✏	Rename
→	Move
🗑	Delete
↺	History
❖	Import from Dropbox
❖	Export to Dropbox
💬	Add/edit description
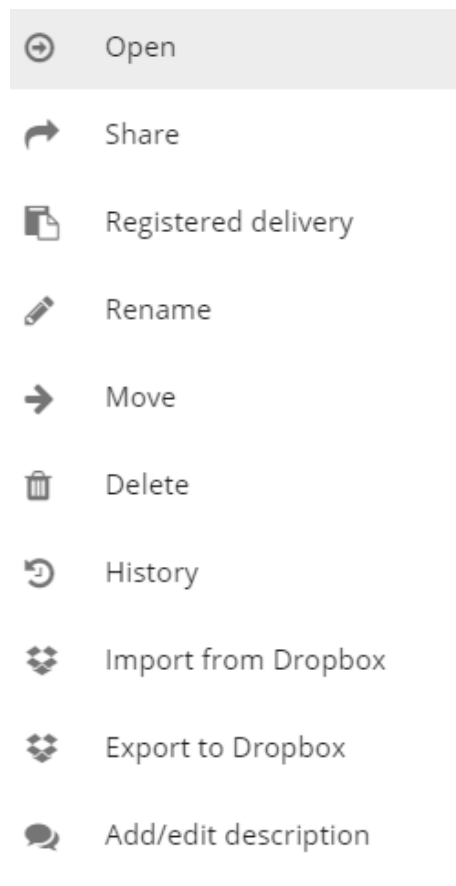
I started to make use of the import from dropbox facility to bring in a number of files to review, rename and move and in some cases delete.

Most of this was self explanatory but I realised that I needed documents to be named in either an alphabetical way or say numerically with the date at the beginning styled YY MM DD for them to sort in some form of reasonable order.

Having said that I could always search within each folder but I would need the file name as there is no facility to tag files.

Also realised that I needed to use the tick box on the right side of the file name to highlight several files to delete together. I could also use the Dustbin icon to delete these highlighted files .

Moving multiple files into different folders in very managable.

Importing and exporting files was relatively easy but I did find uploading a large number of files at once was a bit challenging and downloading had to be done in small volumes. Occassionally I was not sure whether to download to the main folder or sub folders held in Dropbox so found myself having firstly to check all the folders and files had been downloaded and then moving them as appropriate.

I found I did not really use the "history" button which shows the activity of creating / renaming folders within the documents section.

Once on top of the basic file management , I thought it was time to send a file to a client to sign. Choosing the dropdown menu at the side of the file and the "send for signing" option , I was then faced with a dialog box to complete.

This was similar to an email message and let me add a new name with the "add me" botton on the right hand side , enter message , and then enter a further message if I wanted when the document had been signed.

Pressing the "Add new signee" button I was then taken to a further dialog box where I could have pressed "Add another signee" for a further person the sign.

From this dialog box , pressing the "continue" button I was taken to another screen with various other advanced options such a reminders were available.

Finally I was taken to a document signing page with the document taking up 2/3rds of the page and a menu on the right hand side.

Each red button could be dragged and dropped anywhere in the document so I placed a signature box with a date box next to it.

I was ready to send the document but as I was not sure what the client would receive in terms of a message , I started the process again by using my own name / email address as the signee to see what happened.

Finally on the second run ,I pressed the "Send document" button and received an on screen acknowledgement that the document had been sent.

Document has been sent.

Return to your documents

Send this document again for signing

View status

Looking in my emails , there was a message immediately inviting me to sign the document. I realised later that within the settings there are options to change the standardised messages.

The processed appeared to be easy from the instructions in the email so I went ahead and pressed the big red button in the centre of the screen

Dear Tom,

Please review and sign the documents.

Kind regards,

Daniel

Accountancy Practice Limited has sent you **Accountex** to sign online.

Once ready, please click on the below button which will take you to our secure document signing page:

Proceed to review the document

If the button above does not work, simply copy and click on the following link in your browser (Chrome, Firefox or Safari).
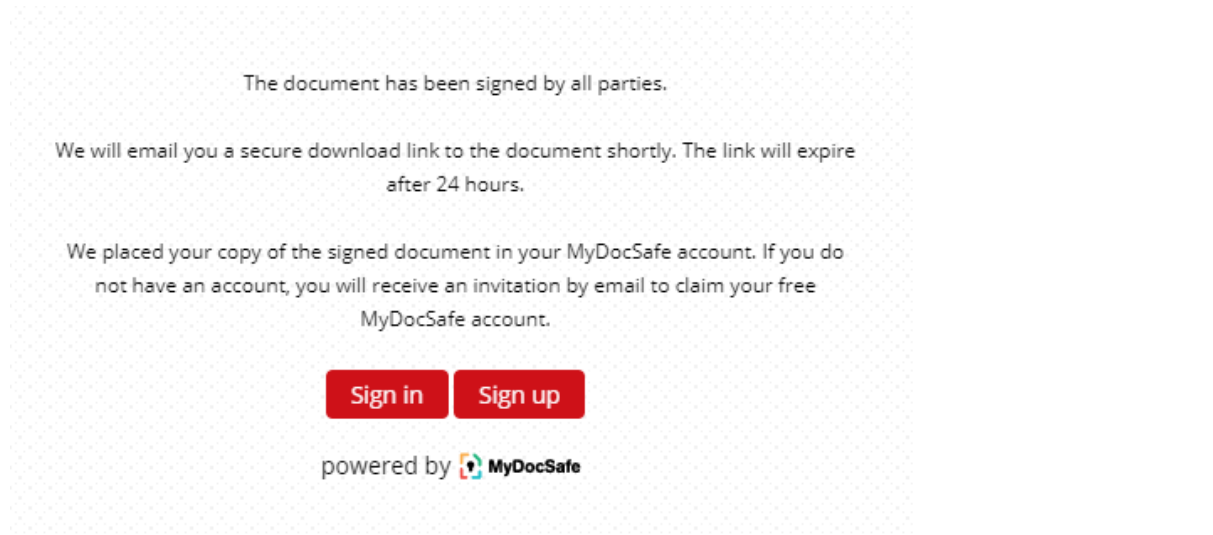
https://app.mydocsafe.com/signing/2h4f4i01/6jelde09/45731/

Pressing the button "Jump to the first Field" took me to the exact spot in the document where I had previously placed the signature box.

Infront of me came a dialog / signing box where I was asked for my full name and given an option to either type of draw my signature. It then came up with an add signature button and moved to the next field where I completed the date.

Your signature   [×]

Full name:
Enter your full name

| Typed signature | Draw signature |

Your Signature Here

Cancel

With box boxes completed , I was then faced with a "Submit this document" button , which I pressed and received an acknowledgement screen.

The document has been signed by all parties.

We will email you a secure download link to the document shortly. The link will expire after 24 hours.

We placed your copy of the signed document in your MyDocSafe account. If you do not have an account, you will receive an invitation by email to claim your free MyDocSafe account.

Sign in   Sign up

powered by **MyDocSafe**

I felt it had been a worthwhile exercise to go through the whole process myself so I knew what the client would be presented with. As it happened it did prove itself when on one occasion the client was concerned about what they were being asked to sign up for from this last message and how much it would cost.

This made me think more carefully about the messages presented to the client and to perhaps forewarn the client that you are sending a document to them for signature or investigate changing the wording on the automated emails.

Going back the the initial dashboard , from the functions keys on the left hand side, it appeared that I had only managed to use one function so far and clearly the product had much more to it to explore.

Company Users Access

Before looking at setting up a form, I explored the options of access and sharing files.

Access can be given in several ways , for instance , company users can be invited via the " Company User" option in the left column and access can be granted at different levels depending on the person's company role. Alternatively any folder of file can be shared by using the dropdown menu via the Ellipse icon next to the file.
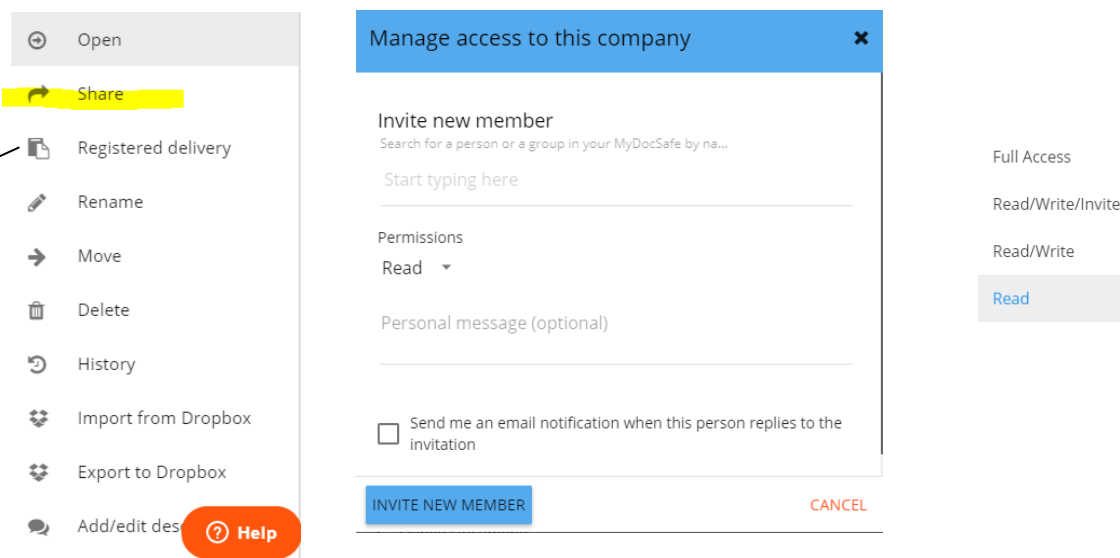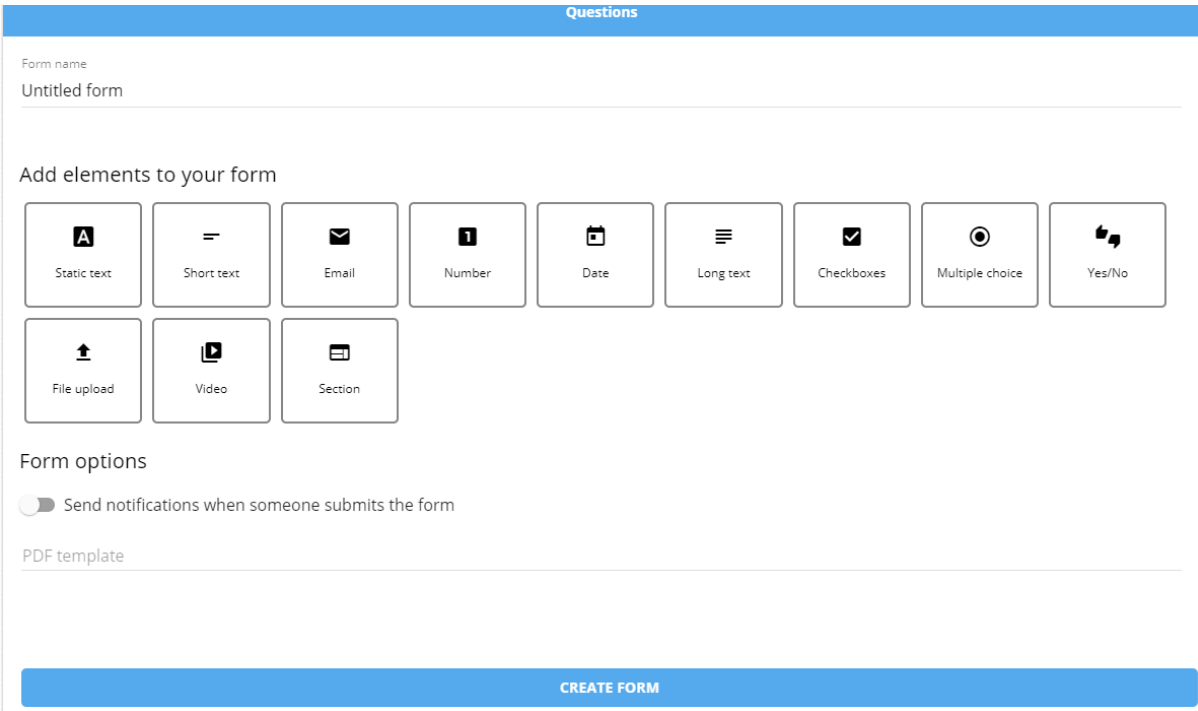

Different levels may be given to company users from read only access to full access.

Creating a form

One of the fundamental purposes of MyDocSafe is to digitise and automate the client on board process, so I looked as creating a form to capture basic details about a customer , the idea being to send this out before an interview. In practice I am not sure I would do this rather take notes on paper during a meeting and then transfer to a client database for the client to check and complete.

Once you open up the "create a form" function , you are faced with the dialog box below. I found this a bit daunting having never had any training in how the elements work. At this point I looked for help / guidance but this was not immediately obvious. The help button just asked me to contact the company with a question.
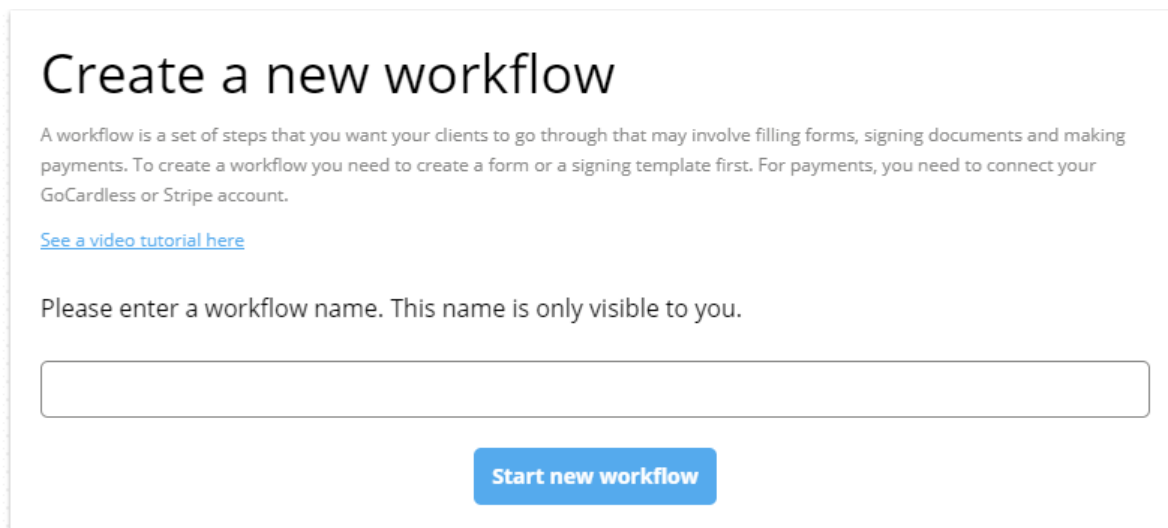
Eventually I found the knowledge database in the MyDocSafe website and it gave some guidance but not enough to prevent me spending several hours understanding what to do with the elements. Eventually I was able to produce something reasonable but am still unsure how much I would use the form in the future.

Workflow

Progressing on to use the workflow function , it was very heartening to see that there was a tutorial video available right from the first dialog box.

Using the video , the main practical use I could envisage within my own practice was to have two distinctly separate processes, one asking for basic information to be able to prepare a Letter of Engagement via the use of a form alone. The second to send a Letter of Engagment to a client for signature and then have , as used on the video, a card payment method being accepted.

With no form templates and a lack of basic programming experience, I think many bookkeepers may find the whole process too complicated and time consuming.

Document Template

Taking a look at Document templates , I was presented with the following screen and not having any modifiable examples other then the Consultancy Agreement, I was faced with having to create a template from scratch.

Opening this option there was a brief set of instructions with how to create to template , but again some of the jargon used is way outside the knowledge of an average bookkeeper and without a better walk through example, I think any perceived value to its use is lost.

Identity Verification

This is an add on chargeable service and whilst I did not try it out,I felt I had no idea where the details I entered would be checked and was a bit sceptical to pay for the service without further clarification.

The ICB money Laundering process is very specific and I am not able to comment on whether this ID verification option is acceptable. Further investigations would need to be made.

Maybe a choice of commercial providers would be an option.

User Portals

One of the main ideas of the user portals is to group clients / members / stakeholders into Portal groups so that you can share documents and make announcements across a number of people at the same time rather than spamming their email. I can see this having some value but my interest in Client portals was mainly a storage , upload and download facilty to share documents with individual clients.

The video accessed from the portal group page is useful. However , what the video does not explain was how to populate the individual portal within a group with say key documents.

Moving files to the shared portal from the doucument section is now much easier than it was and this is helpful.

Key Benefits &Strengths

Cloud based software

UK domiciled and GDPR compliant

Multi user access depending on package bought

Shared ring-fenced client portal (initially free to client unless they choose to increase its functionality)

Ability to create relatively simple forms to send to clients for completion e.g. Client Questionnaire.

Option to upgrade to greater functionality as the practice grows.

The developer is responsive to user requests and it is likely that the product will develop into a mature and feature rich product over time that may well be of benefit to ICB members.

Weaknesses

Help videos are a bit sparse and overall, I feel that the knowledge base needs to be expanded and made more accessible from the main dashboard or the dialog boxes.

When using a previously set up template, it would be useful to have a save in draft function in case all the variables in the template are not readily available.

It would be useful if there were more template and form examples as starting from scratch for more sole practitioners could find the current systems to confusing and time consuming. The ICB target audience is more familiar with adapting proprietary software templates e.g. Invoices in Xero or Microsoft Word, rather than designing their own from scratch.

Value for Money

For a small practice the Starter pack gives a reasonable storage facility but this has to be viewed against a number of different storage software providers in the market but each one has to be judged on its own merits for conforming to GDPR. Overall it is quite limiting.

The Starter pack at £10 per month based on annual billing (plus VAT) , for the functionality offer , represents good value for the lower end user.

	Annual billing	Monthly billing	API pricing	Enterprise

Annual Billing excl. VAT	Starter £10 per month 1 user	Small £25 per month 3 users included	Medium £50 per month 6 users included	Multi £140 per month 10 users included
MyDocSign	✔	✔	✔	✔
MyDocForm	✔	✔	✔	✔
Storage	✔ 2 GB	✔ 25 GB	✔ 100 GB	✔ 200 GB
Templates	✔	✔	✔	✔
Branding	✔	✔	✔	✔ 3
Onboarding	✔	✔	✔	✔
Portals	✔	✔	✔	✔
ID checks	✔ fees apply	✔ fees apply	✔ fees apply	✔ fees apply
GDPR Dashboard	✔ £20 /user	✔ £20 /user	✔ £20 /user	✔ £20 /user
SMS	✔ £0.1 each	✔ £0.1 each	✔ £0.1 each	✔ £0.1 each

Most popular

Summary of Review

When I first came across MyDocSafe, I thought the product would help solve several issues I had with document storage having spread my storage across several products over many years in practice. With the introduction of GDPR, streamlining my processes and getting e signatures on documents was also an attraction.

Through using the product now for several months and experimenting with various functions, I have concluded that the product has a fairly low starter price , however I would not be able to make sufficient use of the client onboarding, client portals and forms aspect on a regular basis and occasional use would make the product unviable. Other recently released CRM, GDPR compatible products are possibly more appropriate for ICB members.

Overall, I think the product is aimed at larger practice who probably have a greater depth of knowledge than a small practice particularly in the areas of form production and template building. Continuous development of the help videos is helpful.

It is a good product if you are looking for the client onboarding process originally envisaged by the founder, but my overwhelming feeling is that it is one of many new and developing software packages and users must think very carefully how much they will use all aspects of the product to make it pay dividends.

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