

## **The Client Folder**

## Introduction

Recently DSLive has seen the addition of a new **'Client'** folder to the application **'Documents'** tab. The 'Client' folder enables authorities to quickly and easily share documents with the applicant/agent such as completion certificates or inspection documents. Sharing documents is as easy as dragging and dropping them from the main list of application documents into the new 'Client' folder, which will automatically cause the documents to appear in the applicant/agent's own Submit-a-Plan account where they can view them. The applicant or agent will also receive a notification email that documents have been shared with them.

The addition of the client folder follows our recent release of **'Standard Documents'**, a facility enabling authorities to create a range of documents online within DSLive itself. Authorities can create and edit their own templates for initial notices, approval certificates, inspection reports and standard letters which can then be shared as a final document with an applicant, agent or another contact straight from DSLive itself. The 'Client' folder makes sharing such a document with the applicant or agent even quicker, meaning it will take authorities as little as 4 or 5 brief steps to create and share a document.

Rece	ived Applications Archived Applica	ions FUL678											
D	ownload	Documents						Options					
	🕹 🔍 🕅	8	۵.	B.		(	2			$\sim$	<b>P</b>		
D	ownload View Edit	Download	Upload	Create	Add To Folder	Ref	resh	Commer	nt	Email	Event		
	ile Desurrante Cisture Desur		<i>C</i>										
reta	iis Documents status Paym	ents Activity	correspond	ience i	rispections Plancheci	<							
	Application Documents	Name			Description		Drawing	Sht.	Rev.	Size	Origin	Created Date	Last Upo
	Additional	AF{405-	54550-06111502	0154} A	Application Form		AF1			54.67 KB	Original	06 Nov 2015	06 Nov 2
	Revised	a2a33ct	366be425ce063	c05fcb p	proposed plans		1936_653607_9	. 1	-	59.01 KB	Addition	27 Jan 2016	27 Jan 20
	Superseded	Foundar	tions.pdf	F	oundations.pdf		1936_799737_1	. 1	-	140.57	Addition	14 Jul 2016	14 Jul 20
	🖕 Public	Baseme	nt.pdf	E	Basement.pdf		1936_799737_1	. 1	A	140.77	Revision	14 Jul 2016	16 Aug 2
	Inspection Documents		ions odf	0	alculations odf		1936 799737 1	1	Α	140 77	Revision	14 Jul 2016	28 Sep 2
,	Contract Plancheck Documents												
÷	Client Documents												
	Doctingent Folders			_									
	Platistiare	CPlancheck D	ocuments										
		Client Docu	ments									D	isplaying
		Description	-1-1										
		Document i	olders										

First you will need to have the relevant application open on your screen in DSLive.

You will then need to select the 'Documents' tab.

Your screen will also need to be zoomed out enough so that all the document folders become visible, making it easy to drag and drop documents.

You will now be able to drag a document by clicking on it in the list and dragging it to the Client folder. To drag more than one document at a time, keep your finger on the **'Shift'** button of your keyboard while clicking on all the documents you require. You can then let go of the shift button and drag your documents to the Client folder (see image below).

[	Download	Documents	i			C	Options			
[	Download View Edit	Download Upload	Create Add To Folder	<b>C</b> Refresh	<b>P</b>	t	Email	Event		
Deta	ails <b>Documents</b> Status Pa	yments Activity Corresponder	nce Inspections Plancheck							
	E > Application Documents	Name	Description	Drawing	Sht.	Rev.	Size	Origin	Created Date	Last L
	Criginal	AF{405-54550-0611150201	54} Application Form	AF1	1	A	54.67 KB	Original	06 Nov 2015	06 Nov
≤	Revised	a2a33cb366be425ce063c05	S 🖉 3 selected rows	1936_653607_9			59.01 KB	Addition	27 Jan 2016	27 Jan
ew A	Superseded	Foundations.pdf	Foundations.pdf	1936_799737_1			140.57	Addition	14 Jul 2016	14 Jul 3
pplica	Public	Basement.pdf	Basement.pdf	1936_799737_1	. 1	Α	140.77	Revision	14 Jul 2016	16 Aug
ition I	Inspection Documents	Calculations.pdf	Calculations.pdf	1936_799737_1	. 1	А	140.77	Revision	14 Jul 2016	28 Sep
Details	<ul> <li>Client Documents</li> <li>Document Folders</li> <li>PlanShare</li> </ul>									
									C	Displayir

When dragging the document(s) the documents themselves will not appear to move. Instead a hovering notification box will appear telling you how many documents you are dragging. As your cursor approaches the folder you will know when to drop your documents as the red **'don't drop'** icon will change to a green **'ready to drop'** tick icon in the notification box. Simply hover over the Client folder with your cursor and take your finger off the mouse to deposit them.



	Download			Document	S					Options				
	Download View	Edit	Down	hload Upload	Create	Add To Folder	C co	<b>P</b> mmen	t	Email	Event			
Deta	Details Documents Status Payments Activity Correspondence Inspections Plancheck													
	📄 🗁 Application Documents			Name		Description	Drawing	Sht.	Rev	Size	Origin	Created Date	Last L	
	Criginal	ß	AF{405-54550-0611150201	154}	Application Form	AF1	1	A	54.67 KB	Original	06 Nov 2015	06 No		
<	Revised	Additional  Revised  Superseded  Public  Inspection Documents  Plancheck Documents		a2a33cb366be425ce063c0	)5fcb	proposed plans	1936_653607_9			59.01 KB	Addition	27 Jan 2016	27 Jan	
iew A	Superseded		ß	Foundations.pdf		Foundations.pdf	1936_799737_1			140.57	Addition	14 Jul 2016	14 Jul	
pplic	╞ Public		ß	Basement.pdf		Basement.pdf	1936_799737_1	1	Α	140.77	Revision	14 Jul 2016	16 Aug	
ation D	Inspection Documents		ß	Calculations.pdf		Calculations.pdf	1936_799737_1	1	A	140.77	Revision	14 Jul 2016	28 Sep	
etails	Client Documents													
	E Document Folders	S selected r	ows											

If you click on the Client folder to open it you will see that copies of the documents you dragged have now been added. The original documents remain in your **'Original'** documents folder. If you need to add documents from any other of your folders, repeat the process.

Det	ails <b>Documents</b> Status Paymen	nts	Activity Correspondence	Inspections Plancheck							
	- 🝃 Application Documents		Name	Description	Drawing	Sht.	Rev.	Size	Origin	Created Date	L
	Criginal	ß	AF{405-54550-061115020154}	Application Form	AF1	1	A	54.67 KB	Original	06 Nov 2015	06
<	Revised		a2a33cb366be425ce063c05fcb	proposed plans	1936_653607_9	1	-	59.01 KB	Addition	27 Jan 2016	27
iew A		ß	Foundations.pdf	Foundations.pdf	1936_799737_1	1	-	140.57	Addition	14 Jul 2016	14
ppli	🏲 Public										
catio	Inspection Documents										
nD	Plancheck Documents										
etail	< Client Documents										
0	- 🗲 Document Folders										
	< PlanShare										
										D	isp

The applicant/agent should now receive a notification email that documents have been shared with them and they can log into their Submit-a-Plan account to view them.



DSLive Help Hub http://www.resolutiondm.com/dslivehelphub

Help & Support: <u>helpdesk@resolutiondm.com</u> 01242 260505