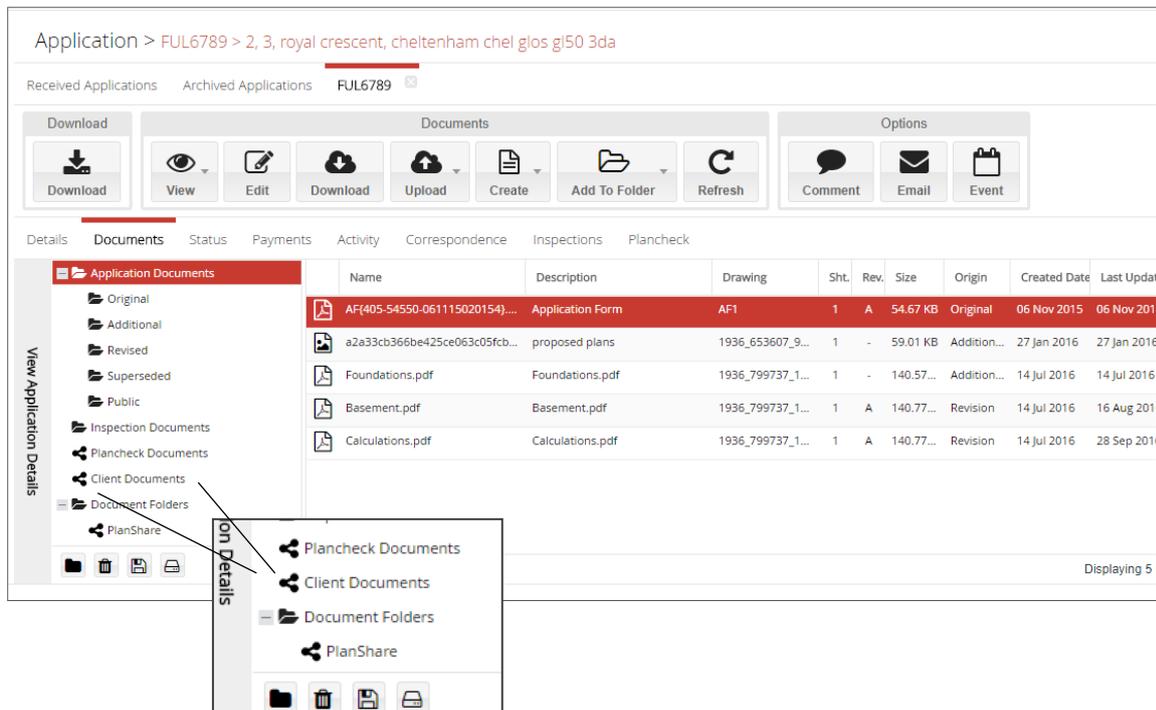


# The Client Folder

## 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.

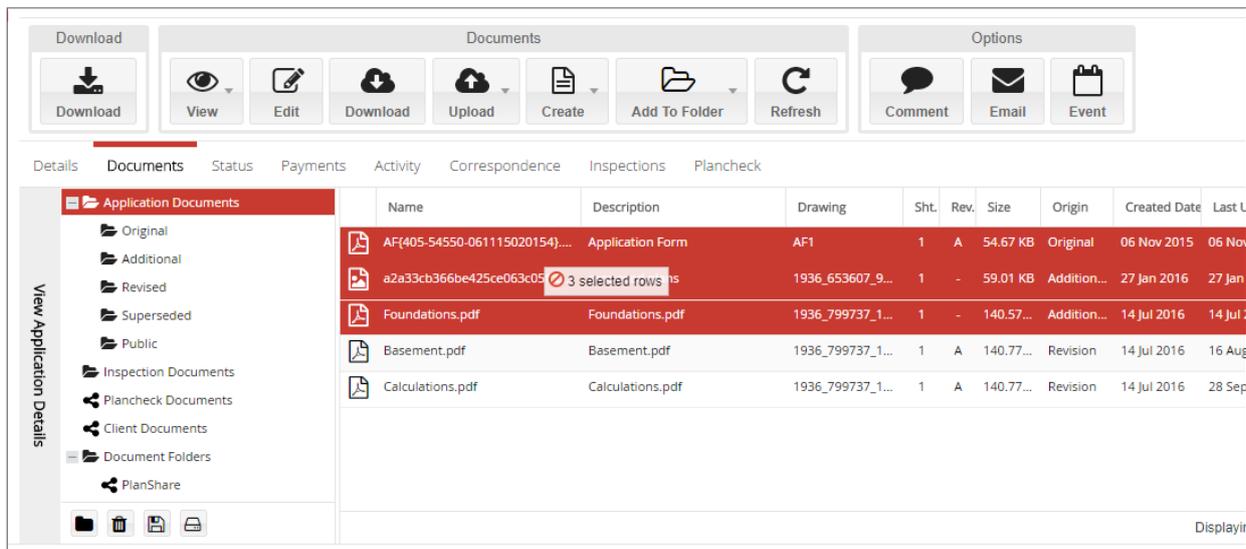


First you will need to have the relevant application open on your screen in DLive.

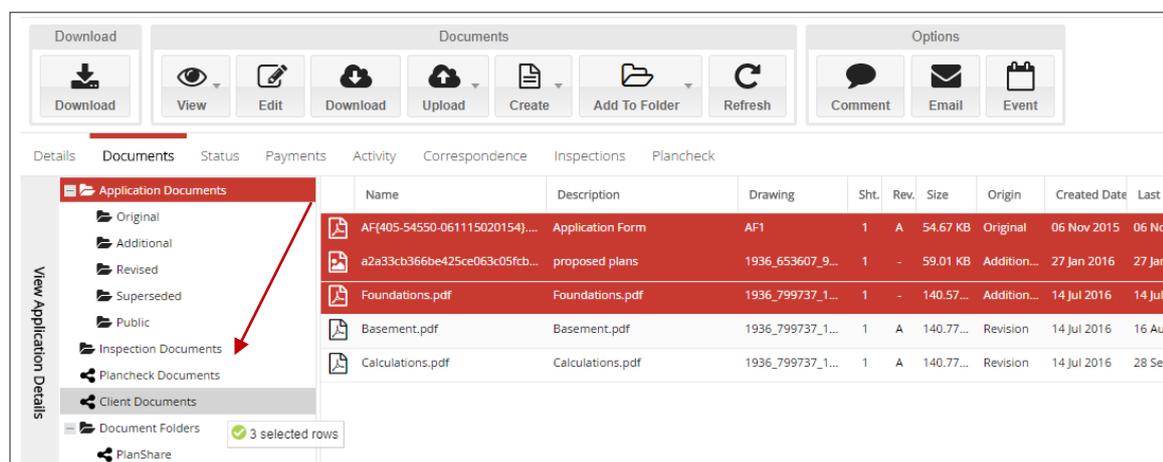
You will then need to select the **'Documents'** tab.

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.

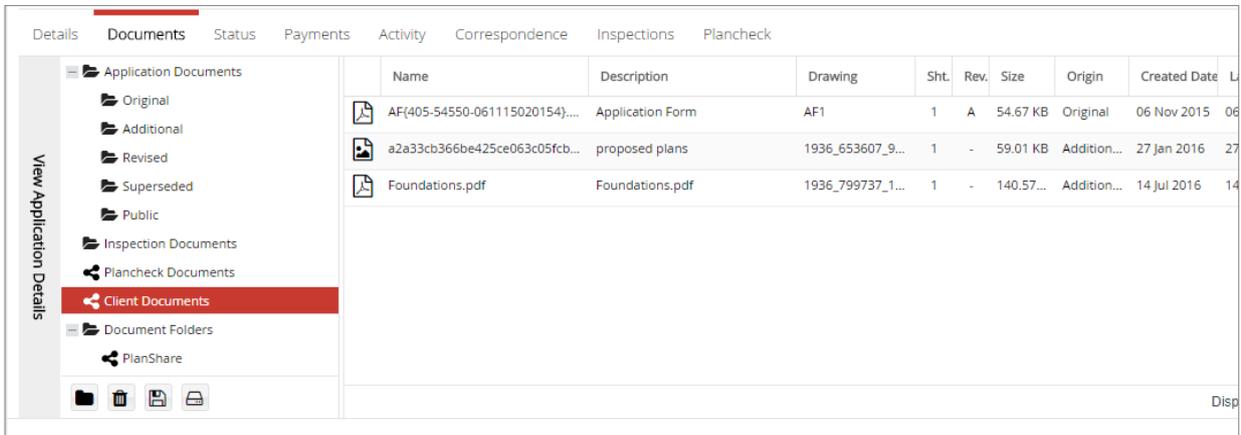
You will now be able to drag a document by clicking on it in the list and dragging it to the Client folder. To drag more than one document at a time, keep your finger on the **'Shift'** button of your keyboard while clicking on all the documents you require. You can then let go of the shift button and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



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.



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.



The screenshot shows a software interface with a top navigation bar containing 'Details', 'Documents', 'Status', 'Payments', 'Activity', 'Correspondence', 'Inspections', and 'Plancheck'. On the left, a sidebar titled 'View Application Details' lists various document folders: 'Application Documents', 'Original', 'Additional', 'Revised', 'Superseded', 'Public', 'Inspection Documents', 'Plancheck Documents', 'Client Documents' (highlighted in red), 'Document Folders', and 'PlanShare'. Below the sidebar are icons for file operations. The main area displays a table of documents with the following data:

Name	Description	Drawing	Sht.	Rev.	Size	Origin	Created Date	L
AF{405-54550-061115020154}...	Application Form	AF1	1	A	54.67 KB	Original	06 Nov 2015	06
a2a33cb366be425ce063c05fcb...	proposed plans	1936_653607_9...	1	-	59.01 KB	Addition...	27 Jan 2016	27
Foundations.pdf	Foundations.pdf	1936_799737_1...	1	-	140.57...	Addition...	14 Jul 2016	14

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

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