foxdox Help Center: User

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1. Help Center

Welcome to our Help Center!

1.1. Getting started

In this topic you will find everything about setting up your account. You will also get a first overview of the web application and the smartphone apps.

1.1.1. Setting up a Pioneered Account

You have received access to a "pioneered account". This page will tell you how to complete your account activation.

> **Note**
>
> - Please use the credentials your provider has given you.
> - Since your account is a private account, you must only use a private e-mail address.
> - You require a web browser and a functioning internet connection.
> - You can also activate your account in the app.
> - All the documents that you receive or upload are encrypted by default.

To activate your account, go to your web browser and open the web page shown in the correspondence from your provider. You can also use the app to activate your account.

This is how it works

1. On the page, enter the credentials you received in the correspondence.
2. Enter your first name and last name, as well as your private e-mail address.
3. Enter a new password for your account, which must contain uppercase letters, numbers and special characters.

Option for subscriptions with double encryption

If you have a subscription with a provider, this provider offers double encrypted delivery for your services. If necessary, you can use double encrypted delivery to store your documents with even more security. If you want to use this function, activate the option **Secure received documents with an additional password** and then enter a key password.

To finish the registration, confirm the terms and conditions of service and complete the registration by clicking **Register**.

What do I next?

You will now receive an e-mail with an activation link. Please follow the instructions in this e-mail. The activation key is valid for only 24 hours! Once you confirm your e-mail address, your account is activated. You can then log into the browser or app at any time.

When you register, the account for pay slips is activated. In the future, you will be able to find your pay slips in the area **My documents > Inbox > <Your employer> > Pay slips**. However, you cannot view the **Pay slips** folder until your provider has sent you the first document.

If you receive a new HR document (for instance, a pay slip or social insurance statement), you are notified of this in an e-mail to your private e-mail address (from your login credentials).

1.1.2. Creating a New Account

If you have already received access data from a provider, simply log in using the access data from the cover letter. You find more information under Setting up a Pioneered Account.

If you want to use the application as a private or business customer, you can create your own account.

> **Note**
>
> - You require a web browser and a functioning internet connection.
> - You can also activate your account in the app.

This is how it works

1. Open the login page in your browser.
2. Click on **Register**.
3. Enter your first name and last name, as well as your private e-mail address.
4. Enter a new password for your account that contains capital letters, numbers, and special characters.
5. Confirm our Terms and Conditions of Service and Privacy Policy.
6. Complete the registration with **Register**.

What do I next?

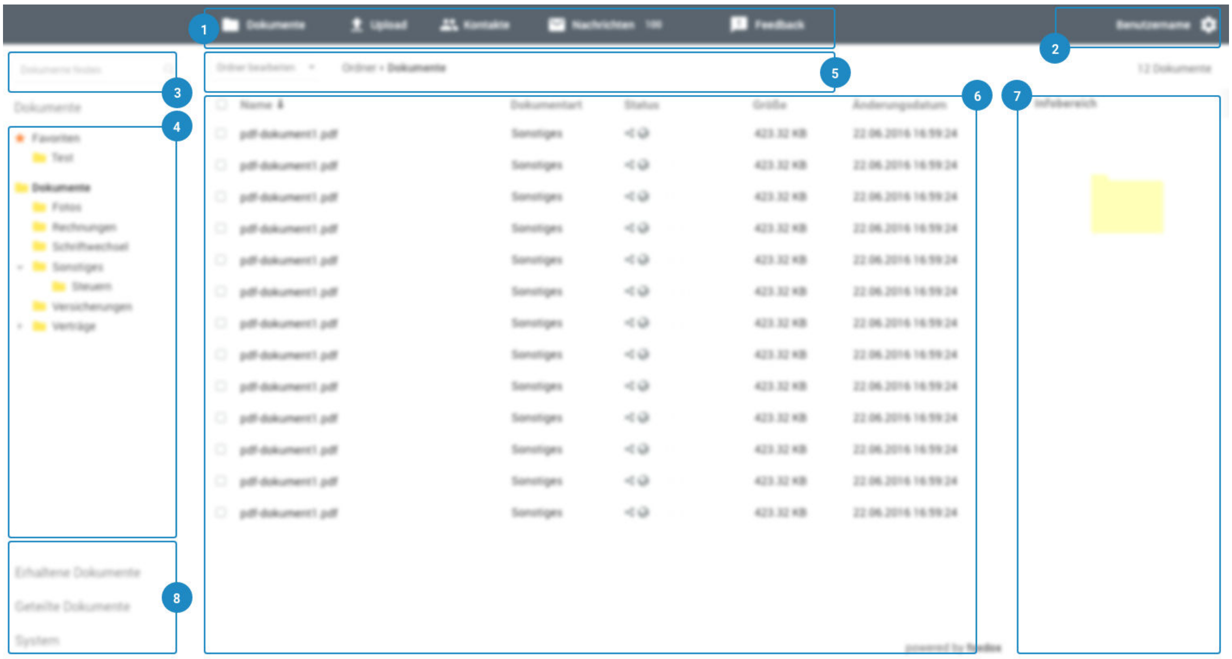
You will now receive an e-mail with an activation link. Please follow the instructions in this e-mail. The activation key is valid for only 24 hours! Once you confirm your e-mail address, your account is activated. You can then log into the browser or app at any time.

1.1.3. Important details of the web application (overview)

To give you a first impression and help you find your way around, we present the two most important views of the web application. First, you will learn about the application and main functions, and then you will take a closer look at the main functions when viewing a document.

When you first open the application, you will immediately see the document list and navigation areas:

1. **Navigation bar**: By default, the **Documents** area is selected. The navigation bar takes you to the other areas, e.g. **Upload**, **Contacts** and **Messages**.
2. **Your profile**: In your profile you can configure settings for your account, change your tariff, or conclude a subscription. Just click on the gear wheel icon.
3. **Search**: You can enter keywords in the search field. The keyword is then searched in all documents and properties for documents (full-text search). For more details, see Searching and Finding Documents
4. **Folder structure** The folder tree is used to organize documents so that you can quickly find your documents. You can customize the folder structure as you like, delete folders, add new folders and also rename existing folders.
5. **Menu with "Edit folder"**: You can select various actions in the menu, e.g. edit the selected folder, create new subfolders and much more.
6. **File list**: The list always shows the files in the selected folder.
7. **Info pane**: When you select a file, further information is displayed, such as the properties, the creation date or the document type.
8. **More folders in the folder structure**:
    a. **Received documents**: All documents or folders that one of your contacts has shared with you appear in this folder.
    b. **Shared documents**: All documents or folders that you have shared with a contact appear in this folder.
    c. **System**: This is where you can find documents that are available in offline mode or that were stored in an audit-proof manner. This is also where you can access the recycle bin.



When you select a document, you get more functions and information about the document.

1. **Details view** The selected document will be automatically converted into a PDF file so that you can conveniently read the content in the detail view. In this view, you can scroll through the document, zoom into the text or view the document in full-screen mode. Formats, such as movies or rare file formats, are not converted to PDF.
2. **Document options**: On the menu list above the detail view you find all functions that are available for the document.
3. **Back to overview**: With this function you can go back to the list view of all files in the folder.
4. **Info pane**: In this area you can find the properties of a document, where the information about the document is stored.

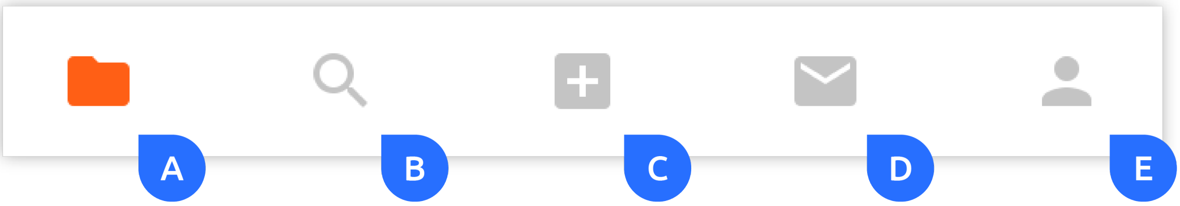
1.1.4. Important details about the app (overview)

In this article, you can find an overview of the basic functions and navigation elements in the iOS and Android apps.

The iOS and Android apps are identical in terms of their structure and functions. The app has a slightly smaller range of functions in comparison to the web application.

The first time that you open the app, you are immediately shown the document list and the navigation area below it.

From the navigation area, you can reach all the main areas of the app using the following navigation elements: **Documents** (A), **Search** (B), **Upload** (C), **Messages** (D) and **Profile** (E).



Under **Documents** (A), you can find the folder structure that you use to manage your documents. If you scroll down to **System** below the folder structure, you can find your audit-proof documents, the documents that are available offline and the recycle bin.

You can add documents at any time using the **Upload** function (C). You can find your messages under **Messages** (D).

If you want to change app settings, you can find a variety of options including an option to change your user name, notification settings and a password lock for the app (security function) under **Profile** (E).

Once you select a document, you can access various functions by tapping the three dots next to the document. You can share a document with other people, display additional details about the document and move or delete the document.

1.2. Managing the Account

This topic gives you information about your account and which data and settings you can change and manage.

1.2.1. Changing your Account Data

You can change your personal data on your own in the account settings.

This is how it works in the browser

1. Click on the gear wheel icon and then select **Account**.
2. Enter your updated information in the section **Personal data**.
3. Click on **Save** to apply your changes.

This is how it works in the app

1. Navigate to **Profile** > **Settings** > **Personal data**.
2. Enter your new information and tap **Save**.

1.2.2. Changing your Password

You can change your account password by yourself in the account settings. Always use a strong password to ensure that your account is well protected.

This is how it works in the browser

1. Click on the gear wheel icon and then select **Account**.
2. In the section **Password**, click on **Change**.
3. Enter your current and your new password in the corresponding fields.
4. Click on **Save** to activate your new password.

This is how it works in the app

1. Navigate to **Profile > Settings > Personal data**.
2. Tap **Password** and enter your current and your new password.
3. Tap **Change** to activate your new password.

1.2.3. Changing your E-mail Address

You can change your e-mail address on your own in the account settings. Enter a valid email address that only you have access to.

This is how it works in the browser

1. Click on the gear wheel icon and select **Account**.
2. Click on**Change** in the section **E-mail address**.
3. Enter your new e-mail address in the corresponding fields.
4. Click on **Change** to start changing your e-mail address.
5. Click on **Click** in the e-mail you received from d.velop. You should ideally do this on a PC.
6. Log in again with your old access data.
7. Click on **Change** on the new page.

This is how it works in the app

1. Navigate to **Profile > Settings > Personal data**.
2. Tap your e-mail address and enter your new e-mail address.
3. Tap **Change** to start changing the e-mail address.
4. Tap **Click** in the e-mail you received from d.velop. You should ideally do this on a PC.
5. Log in again using your old credentials.
6. Tap **Change** on the new page.

> **Note**
>
> Pay particular attention to the last two steps. After opening the link from the e-mail, you have to log in with your old credentials once more to finalize the change. Once you have logged in successfully, a corresponding message is displayed to confirm that the change has been completed.
>
> You can only confirm the e-mail address via a PC or web browser.

1.2.4. Changing the notification events and their frequency

You can choose at any time about which events you will be notified and on which channels. You have several channels available for notifications:

- **Product name**: You can choose to receive a notification within the web application or the mobile app.
- **E-Mail**: The message is sent to the e-mail address specified in your profile.
- **Push notifications**: You can receive push notifications to your smartphone or tablet. Be sure to enable the notification feature in the app.

Let's say you want to receive fewer emails about a particular event. You can adjust the options in the account settings.

This is how it works

1. Click on the gear wheel icon and then select **Account > Notifications**.
2. Disable the notifications you no longer want to receive. The changes are saved automatically.

You can only complete these steps in a web browser, and not using the app. You should ideally make the change on a PC.

1.2.5. Changing your User Name

You can change your user name on your own in the account settings.

This is how it works in the browser

Web application:

1. Click on the gear wheel icon and then select **Account**.
2. Click on **Change** in the section **User name** .
3. Enter your new user name and click on **Change**.

This is how it works in the app

1. Navigate to **Profile > Settings > Personal data**.
2. Tap your user name and enter your new user name.
3. Tap **Change** to save your new user name.

1.2.6. Deleting your Account

If you decide to stop using your account, you can delete your account in the account settings.

> **Warning**
>
> Once you mark your account for deletion, you will be automatically logged out of all apps and applications. You will then no longer be able to log in.
>
> If you have accidentally selected your account for deletion or changed your mind, you can contact our support within 24 hours to reverse the deletion.

This is how it works in the browser

1. Click on the gear wheel icon and then select **Account > Delete account**.
2. Enter your current password on the page **Delete account**.
3. Place a check mark beside **Yes, do delete** and click on **Delete account**.
4. Click on **Completely delete your account and data** in the e-mail you received from d.velop.
5. Log in on the new page and click on **Delete**.

This is how it works in the app

1. Go to **Profile > Settings > Delete account**.
2. Confirm the deletion by tapping **Delete account** again.
3. Tap **Completely delete your account and data** in the e-mail you received from d.velop.
4. Log in on the new page and click on **Delete**.

Your account will be deleted within 48 hours. We will notify you via e-mail once your account has been completely deleted.

> **Note**
>
> Pay particular attention to the last two steps. After opening the link from the e-mail, you have to log in with your old credentials once more to finalize the change. Once you have logged in successfully, a corresponding message is displayed to confirm that the deletion will be completed.
>
> You can only complete the deletion process via a PC or web browser.

1.2.7. Setting up two-factor authentication

You can set up two-factor authentication (2FA) to provide your account with extra protection against third-party access. Each time that you log in, you have to authenticate yourself again using a second factor.

> **Note**
>
> - You need a smartphone with an authenticator app.
> - You set up the feature using the d.velop platform.
> - If you cannot see the function yet, 2FA is not activated for your provider yet.

This is how it works in the browser

1. Click the gearwheel icon and choose **Account > Two-factor authentication**.
2. Choose **Set up**.
3. Follow the instructions on the page that opens and scan the QR code using your authenticator app.
4. Enter the confirmation code from your authenticator app in the **One-time code** field. You have the option of entering a device name.
5. Click **Enable two-factor authentication** to complete the setup.

This is how it works in the app

1. Go to **Profile > Settings > Two-factor authentication**.
2. Tap **Set up**.
3. Follow the instructions on the page that opens and tap **Unable to scan?**.
4. Enter the displayed configuration key in your authenticator app. You can also copy the configuration key to the other apps.
5. Enter the confirmation code from your authenticator app in the **One-time code** field. You have the option of entering a device name.
6. Tap **Enable two-factor authentication** to complete the setup process.

1.2.8. Deactivating two-factor authentication

If you have activated two-factor authentication (2FA) in your account, you can deactivate 2FA yourself at any time in the account settings. To deactivate 2FA, you require a one-time code from your authenticator app.

This is how it works in the browser

1. Click the gearwheel icon and choose **Account > Two-factor authentication**.
2. Choose **Deactivate**.
3. Enter the code from your authenticator app in the **One-time code** field.
4. Click **Log in** to deactivate two-factor authentication.

This is how it works in the app

1. Go to **Profile > Settings > Two-factor authentication**.

2. Tap **Deactivate**.
3. Enter the code from your authenticator app in the **One-time code** field.
4. Tap **Log in** to deactivate two-factor authentication.

1.3. Key and encryption

You can create a key when activating your account or at a later time. Keys can only be managed via the web application.

> **Note**
> A key for the application is used for the security of your documents. The key for the application works similarly to a key for a safe where you keep important documents. So only you are allowed to view or edit the documents in the safe. The safe is protected with your password. In this way, only you yourself have access to the encrypted documents.

In your application, the key is a mere technical function to additionally encrypt particularly sensitive documents. Only you can view, download or edit the encrypted documents with the password for the key.

You can, of course, turn off the encryption of your document again. You find a manual under Reversing Encryption. Turning off the function only affects new documents.

Security is important

Keep the password and the corresponding key file safe. Be sure to download your key file. You find a manual under Downloading the key to reset the password.

If you nevertheless forget your password for the key, you can reset this password using the key file only. You find a manual under What do I have to do if I forget my key password?

> **Warning**
>
> - Without the key file you cannot reset your password for the key. Be sure to save the key file locally in a secure location.
> - Use your private PC.
> - Do not ever rename the file.

1.3.1. Creating a Key

If you want to receive encrypted documents from a provider, you need a personal key.

This is how it works

1. Click on the gear wheel icon and then select **Account > Keyring > Create new key**.
2. Assign a **Name** and a **Password** for the key. If necessary, enable **Use this key as default key** to set a new default key.
3. Click on **Save**.
4. Download the key file by clicking on **Download key**. Be sure to save the key file in a secure location.
5. Click on **Close** to close the dialog.

> **Warning**
> Only you personally can recover the password. If you forget the password, you can no longer decrypt your files. Therefore, make sure that you also keep the password in a secret place.

You can only complete this process in a web browser, and not using the app. You should ideally use a PC to complete the required steps.

1.3.2. Reversing Encryption

If you receive encrypted documents, you can disable encryption for your documents at any time.

This is how it works

1. Click on the gear wheel icon and select **My subscriptions** and then the name of your provider.
2. Click on **Options** and disable **Protect received documents with an additional password**.
3. Click on **Finished** to apply the setting and close the dialog.

You can only complete this process in a web browser, and not using the app. You should ideally use a PC to complete the required steps.

1.3.3. Downloading the key to reset the password

We strongly recommend you to download the key. You need the key file, e.g. to reset your personal key password.

> **Note**
> Save this file in a secure location. Do not ever rename the file.

This is how it works

1. Click on the gear wheel icon and then select **Account > Keyring**.
2. Select your key and click on **Edit > Export**.
3. Enter your password and afterwards on **Export**.

You can only complete this process in a web browser, and not using the app. You should ideally use a PC to complete the required steps.

1.4. Managing Documents

This chapter tells you how to handle documents and how to work with them.

1.4.1. Creating a folder

You can add a new folder within your folder structure.

This is how it works

1. Click on **Edit folder > Edit**.
2. In the **Create in** drop-down menu, select the folder in which you want to create the new folder.
3. Enter a name for the new folder.
4. Select the standard document type for files that are saved in the new folder. You can also add this folder to your favorites.
5. Click on **Save** to create the new folder.

1.4.2. Renaming a Folder

You can rename an existing folder at any time.

This is how it works

1. Navigate to the folder you want to rename.
2. Click on **Edit folder > Edit**.
3. Enter a new name for the folder.
4. Click on **Save** to save the settings.

1.4.3. Uploading Files

You can save personal files to your account at any time. There are two options: You can simply upload and save your files once in any folder. Only at a later stage do you sort and organize your files. When you directly sort your personal files and upload them to a specific folder. This way, there is no need to clean up afterwards.

Suppose you have insurance policies that you want to save in your account. You have already created the **Insurance policies** folder.

This is how it works

1. Click on **Upload** on the navigation bar.
2. In **Destination folder**, select the folder where you want to save your personal files.
3. Click on **More options** to specify the settings for the document type and the advanced encryption.
4. Click on **Document type** to assign the document type for the files you want to upload. The document type applies only for your files. The destination folder may have another document type.
5. Click on **Advanced encryption** to set a key for the advanced encryption. This function is optional and not available in all tariffs.
6. Click **Add files** and select the files on your data carrier (e.g. hard disk, USB stick).
7. Click on **Upload** to upload the files.
8. Click on **Close** to close the dialog as soon as the files have been successfully uploaded.

1.4.4. Viewing Documents

You can view your documents at any time, whether you have just uploaded them or they have been stored for a while.

This is how it works

1. Navigate in the folder structure to the folder where the document is located.
2. Click on the file in the file list to open the document.

The document is displayed in the detail view.

Find more information on viewing encrypted documentshere.

1.4.5. Searching and Finding Documents

You can search all document using the full-text search for simple terms or start a refined, combined search. If the documents are unencrypted text documents, we also search the contents of the documents for the entered keywords.

In this article we will briefly introduce you to the different search options.

Searching for simple terms

1. Enter a keyword (search term) in the search field above the folder structure.
2. Click on the magnifying glass symbol or press the **ENTER** key.

The results are displayed in the results list.

Search for documents that must exactly match your keywords

You can search for any number of words that are in the exact order and spelling you are looking for in any documents. You can search by name or even by whole sentences, e.g. "John Doe" or "Simple document exchange in the cloud".

Suppose you are searching for a letter to "John Doe". You want to exclude all documents addressed to "John Deer" and "Jane Doe".

1. Enter **"John Doe"** in the search field above the folder structure. You must always enclose the searched keywords in quotation marks.
2. Click on the magnifying glass symbol or press the **ENTER** key.

The results are displayed in the results list.

Search for documents containing two keywords at the same time

Suppose you know that in a document the keywords "mail" and "invoice" occur at the same time. However, you want your search to exclude documents that contain either the keyword "document service" or "mail".

1. Enter **mail AND invoice** in the search field above the folder structure. You simply link your keywords with **AND**.
2. Click on the magnifying glass symbol or press the **ENTER** key.

The results are displayed in the results list.

Search for documents in which at least one of the keywords occurs

Suppose you want to find all documents that contain either "mail" or "invoice". This type of search works for any number of keywords.

1. Enter **mail OR invoice** in the search field above the folder structure. You simply separate your keywords with **OR**.
2. Click on the magnifying glass symbol or press the **ENTER** key.

The results are displayed in the results list.

Search for documents using keywords supplemented by an asterisk as a placeholder

Suppose you know that there are documents in which a certain word occurs. However, you no longer know the exact spelling of the word or you also want to find combinations with the keyword (all words containing the keyword).

1. Enter **invoice*** in the search field above the folder structure. The keyword is followed by an asterisk (*). The star serves as a placeholder for any letters.
2. Click on the magnifying glass symbol or press the **ENTER** key.

The results are displayed in the results list.

> **Note**
> You can use the search with the asterisk in many ways:
>
> - You can also place an asterisk in the middle of a keyword and replace e.g. umlauts or special characters. For example, you no longer know whether "Meier" is spelled with "ai", "ey" or "ay". In this case, the asterisk will help you. Simply enter **M*er** in the search field. The same applies to special characters in other languages.
> - You can also search for amounts of money. For monetary amounts, you must replace decimal points or thousands separators with the asterisk. For example, if you want to search for the amount 14.45, enter **14*45**.

1.4.6. Forwarding and sharing documents

There are several ways you can provide your documents to other people.

- **Share:** You can share your documents with other people within the application at any time, so you can work together on these shared documents. You find more information on sharing documentshere.

- **Publish:** If you want your documents to be read by people who do not have an account, you can send these documents as a link to an e-mail address, for example. You find more information on publishing documentshere.
- **Sending** You can also send an uploaded document to a provider within the application. This sending procedure complies with the law and is comparable to sending documents by mail. Always use this function if, for example, you want to send a certificate of incapacity to the employer. You find more information on sending documentshere.

Sharing documents with contacts within the application

Sharing documents with contacts in the application is the safest option. The document remains in your possession, the original document remains in the original location. However, you can allow your contacts to edit the document by granting the appropriate permissions.

This is how it works

1. Select the document you want to share in the file list.
2. In the document options, click on **Share** and then select again **Share**.
3. Enable the appropriate permissions for the document for the contact or for multiple contacts.
4. Click the arrow next to **Message** to add a message to your contact or all selected contacts. You can also share your document without a message.
5. Click on **Finished** to share the document with the selected contact or contacts and to close the dialog.

> ### Note
> You can do even more with the **Share** function:
>
> - **Change permissions of shared documents at any time**: To change the permissions, repeat steps 1 and 2 mentioned above and re-assign the permissions in step 3.
> - **Share folder with all documents**: You can share the entire folder contents with your contacts at once instead of selecting each document individually. If you are in the folder, click on **Edit folder > Share**. Continue as described from step 3. If you upload a new document to this shared folder, the document will be automatically shared with all contacts.

Publishing documents with contacts outside the application

The **Publish** function allows you to make documents in your possession in the application available to people outside the application. You will receive one link per document, which you can send to a recipient by e-mail, for example. The document remains in your possession and application. Your recipients can download the document as a copy locally, for example.

This is how it works

1. Select the document you want to publish in the file list.
2. In the document options, click on **Share** and select **Publish**.
3. Create a link to the document by clicking the plus icon to create a link.
4. Either copy this link to the clipboard to send the link e.g. in a chat or send the link directly via e-mail to a recipient.
5. Click on **Finished** to close the dialog.

Note

Publishing a document gives you even more options:

- You can copy the link directly into the browser and open the document, e.g. to test the access.
- You can add an expiry date to the link. With the expiration date, the recipient can no longer view or download the document. You can find this option in the settings (gear icon) for the link.
- You can also protect the link with a password. You set the password and it is valid only for the document. Your recipient can open or download the document only with the password. You can find this option in the settings (gear icon) for the link.

Sending documents to a provider

The function **Send to provider** is only available if you have subscribed to a provider. This function complies with the law and is comparable to sending documents by mail. This function is suitable for sending an incapacity certificate to employers.

This is how it works

1. Select the document you want to send in the document list.
2. In the document options, click on **Share** and select **Send to provider**.
3. Then, under **Provider Services**, select a provider service to which you want to send the document.
4. Then fill in the form fields and check your information. You will not be able to change your information after the document has been sent.
5. Click on **Send** to send the document to the provider and close the dialog.

Publishing folders with contacts outside the application

The **Publish** function allows you to make entire folders and their contents that you own in the application available to people outside the application. You will receive one link per folder, which you can send to a recipient by e-mail, for example. The documents in the folders remains in your possession and application. Your recipients can download the document as a copy locally, for example.

This is how it works

1. Navigate to the folder you want to publish.
2. Click on **Edit folder > Publish**.
3. Create a link to the folder by clicking on **Create link**.
4. Either copy this link to the clipboard to send the link e.g. in a chat or send the link directly via e-mail to a recipient.
5. Click on **Finished** to close the dialog.

Note

Publishing a folder gives you even more options:

- You can copy the link directly into the browser and open the published folder, e.g. to test the access.
- You can also protect the link with a password. You set the password and it is valid for the entire folder. Your recipient can open or download the folder only with the password. You can find this option in the settings (gear icon) for the link.

1.4.7. Opening encrypted documents

You may receive encrypted documents from your provider. To view the encrypted documents, you need to decrypt these documents.

You have the following options to view encrypted documents:

- **Show** You can just view the document in the application. After you close the document again, it is immediately encrypted again. You will then have to enter the password again the next time you display it. You find more information on viewing documentshere.
- **Download:** If you just want to print the document, save the document on a data carrier (PC, USB stick, etc.). You find more information on downling here.
- **Edit/decrypt** You can also just decrypt the encrypted document. When decrypting, you can decide whether to save both an encrypted and unencrypted document in the application. You find more information on decrypting a documenthere.

> **Note**
> You can generally disable the encryption of documents. If you disable the function, encrypted documents will be sent to you unencrypted in the future. All documents already received remain encrypted.
>
> You find more information on disabling the encryptionhere.

Viewing an encrypted document

You can directly view an encrypted document, e.g. your payroll. You recognize encrypted documents by the key symbol in the column **Status**.

This is how it works

1. Select the document you want to view in the file list.
2. Click **View** in the document options.
3. Enter the key password for the document.
4. Click on **View** to display the document.

After you close the document again, it is immediately encrypted again. You will then have to enter the key password again the next time you display it.

Complete decrypting of an encrypted document

You can directly view an encrypted document, e.g. your payroll and save it as a decrypted copy in the application. You recognize encrypted documents by the key symbol in the column **Status**.

This is how it works

1. Select the document you want to decrypt in the file list.
2. Click on **Edit > Decrypt** in the document options.
3. Enter the key password for the document.
4. Select whether you want to keep the original encrypted document or move the encrypted document to the recycle bin.
5. Click on **Decrypt** to decrypt the document and close the dialog.

After you decrypt the document, you can view the document at any time without re-entering the key password.

Downloading an encrypted document

You can download an encrypted document, such as your payroll, as a decrypted copy to your device. For example, if you want to print a document, you need to download the document to a local disk. You recognize encrypted documents by the key symbol in the column **Status**.

This is how it works

1. Select the document you want to download in the file list.
2. Click on **Download** in the document options.
3. Enter the key password for the document.
4. Click on **Download** to store the document locally and close the dialog.

1.4.8. Moving documents to another folder

You can move documents to any folder. For example, if you accidentally uploaded a document to any folder, you can move this document to the correct folder. You can also move documents that a provider has sent to you.

This is how it works

1. Select the document you want to move in the file list.
2. Click on **Move** in the document options.
3. Select the folder into which you want to move the document.
4. Click on **Move** to move the document and close the dialog.

1.4.9. Renaming documents

You can change the display name of a document at any time, the name of the original file in the application will be preserved. You can always see the original name in the properties of a document.

This is how it works

1. Select the document you want to rename in the file list.
2. Click on **Edit > Properties** in the document options.
3. Enter a new display name for the document.
4. Click on **Save** to apply the new display name and close the dialog.

1.4.10. Deleting documents

You can delete a document from a folder at any time. The deleted document will be moved to the recycle bin. You can restore the document from the recycle bin. Only when you finally delete the document in the recycle bin is it irrevocably and permanently deleted.

This is how it works

1. Select the document you want to delete in the file list.
2. Click on **Delete** in the document options.
3. Click on **Delete** to move the document to the recycle bin and close the dialog.

1.4.11. Clearing the recycle bin

You can delete documents irrevocably at any time by deleting these documents from the recycle bin. You cannot undo the deletion of the documents.

This is how it works

1. In the folder structure area, select the **System** folder.
2. Click on **Recycle bin**.
3. Select the documents you would like to delete and click on **Delete**.
4. Confirm that you want to irreversibly delete these documents by enabling the option **Yes, delete permanently**.
5. Click again on **Delete** to permanently delete the documents and close the dialog.

1.4.12. Changing the document type

You can change the properties of a document at any time. The properties of a document depend on the document type. So if you want to change the properties, change the document type. Suppose you have defined an invoice as a photo and now want to correct this to show properties such as invoice amount.

This is how it works

1. Select the document which properties you want to change in the file list.
2. Click on **Edit > Document type** in the document options.
3. Under **New document type**, select the document type that is appropriate for your document.
4. You can now compare the property fields and apply them to the new document type.
5. Click on **Save** to apply the properties and close the dialog.

1.4.13. Changing document properties

You can assign properties to your documents. A document's properties are displayed next to the document if the document is open. You can edit the properties of a document.

This is how it works

1. Select the document which properties you want to change in the file list.
2. Click on **Edit > Properties** in the document options.
3. Make the changes to the properties.
4. Click on **Save** to apply the new properties and close the dialog.

1.4.14. Restoring documents from the recycle bin

If you delete a document, this document is moved to the recycle bin. You can restore documents at any time from the recycle bin.

This is how it works

1. In the folder structure area, select the **System** folder.
2. Click on **Recycle bin**.
3. Select the documents you would like to restore and click on **Restore**.
4. Confirm that you want to restore these documents by clicking on **Restore**.

1.4.15. Downloading files

You can download an encrypted document, such as your payroll, as a decrypted copy to your device. For example, if you want to print a document, you need to download the document to a local disk. You recognize encrypted documents by the key symbol in the column Status. If your documents are stored encrypted, you also need to enter the key password. You find more information on downloading encrypted documentshere.

This is how it works

1. Select the document you want to download in the file list.
2. Click on **Download** in the document options.

1.5. Managing Contacts

This chapter contains everything about contact management. Contacts can only be managed in the web application.

1.5.1. Adding a new contact

You can share documents with people within the platform. To do this, you must first add these people as a contact.

This is how it works

1. Click on **Contacts** in the navigation bar.
2. Click on **Invite persons**.
3. Enter a name and a valid e-mail address for the contact you want to create.

4. Click on **Invite** to invite the person and close the dialog.

> **Note**
> To share documents, you can invite any persons by sending an e-mail. If these persons already have an account and accept your invitation, you will be in contact with them from that time on and can exchange documents and folders. If these persons do not have an account yet, they will receive a request to register and create an account. As soon as this is done, you are in contact with them and can share documents and folders.

1.5.2. Addinging a contact based on the user name

You can share documents with people within the platform. To do this, you must first add these people as a contact.

> **Note**
> In order to add a contact by user name, the account owner must make the user name visible within the application.

This is how it works

1. Click on **Contacts** in the navigation bar.
2. Enter the user name of your contact in the search field. The results are displayed in the results list.
3. In the results list, click **Send contact request** for the contact.
4. Click on **Send**.

1.5.3. Creating groups

You can group multiple contacts together to make it easier to share documents with multiple people. This function is not included in all tariffs.

This is how it works

1. Click on **Contacts** in the navigation bar.
2. Click on **Edit group** and select **Create**.
3. Enter a new name for this group.
4. Click on **Save** to create the new group.

1.5.4. Adding contacts to a group

Once you have created a group, you can add existing contacts to it.

This is how it works

1. Click on **Contacts** in the navigation bar.
2. Select the group you would like to edit.
3. Click on **Edit group > Edit**.
4. Select the existing contacts you would like to add to the group.
5. Click on **Save** to apply the setting and close the dialog.

1.5.5. Deleting contacts from the contact list

You can remove an existing contact from your contact list by deleting the contact.

> **Note**
> As soon as you delete a contact, the documents and folders you have shared with this contact will no longer be shown in the section **Shared documents** in their account. Documents that have already been downloaded or duplicated to other folders are not impacted by this (possible only if “Write” rights were granted during sharing).

This is how it works

1. Click on **Contacts** in the navigation bar.
2. In the results list, click **Delete contact** for the contact.
3. Confirm that you want to delete the contact from your contact list by enabling the option **Yes, delete permanently**.
4. Click on **Delete** again to permanently delete the contact from your list and close the dialog.

1.6. Managing subscriptions

You can find information about the inbox and your subscriptions on the following pages.

1.6.1. Redeeming a subscription code

With the help of a subscription code or service key, you can subscribe to a service from a provider so that you can also receive or send documents digitally. You can often find the subscription code in your provider's cover letter. If your provider offers double encryption, you can also activate it this way. You find more information on encrypting documents here.

This is how it works

Web application:

1. Click on the gear wheel icon and then select **My subscriptions > Subscribe to service now**.
2. Enter the subscription code or service key you received from your provider, and then click **Next**.
3. Then click once again on **Next** and on **Finished** to confirm the subscription and close the dialog.

Mobile app:

1. Navigate to **Profile > New subscription**.
2. Enter the subscription code or service key you received from your provider, and then click **Next**.
3. Then click once again on **Next** and on **Finished** to confirm the subscription and close the dialog.

Option for subscriptions with double encryption

If you have a subscription with a provider, this provider offers double encrypted delivery for your services. If necessary, you can use double encrypted delivery to store your documents with even more security. If you want to use the function, enable the option **Protect received documents with an additional password** between step 2 and 3 and then enter a key password.

1.6.2. Canceling a subscription from a provider

You can cancel your subscription with a provider. Please note that you will then no longer be able to receive documents from this provider. You cannot reactivate a canceled subscription yourself.

This is how it works

1. Click on the gear wheel icon and select **My subscriptions** and then the name of your provider.
2. Click on **Cancel** for the relevant subscription.
3. Place a check mark beside **Yes, I want to cancel this service** to confirm.
4. Click on **Send cancelation** to make the cancelation effective and close the dialog.

You can only complete this process in a web browser, and not using the app. You should ideally use a PC to complete the required steps.

1.7. Tariffs & Shop

In this chapter you will find all the information about paid tariffs and the shop.

1.7.1. Posting a tariff

If you would like to use additional functions or need more storage, you can sign up for a new tariff. The functions are available immediately after purchase.

This is how it works

1. Click on the gear wheel icon and then select **Tariffs**.
2. Click on **Change tariff**.
3. Select a tariff from the list and click on **Buy**.
4. Enter your invoice and payment data.
5. You need to consent to the Terms and Conditions of Service, the Privacy Policy, and the Cancelation Policy.
6. To conclude your order, click on **Purchase now**.

1.7.2. Canceling a tariff

If you have decided to cancel your tariff, you need to e-mail a letter of cancellation. In your e-mail, please tell us the user name and the e-mail address of the account. If you have multiple accounts, we need the username and email address per account.

The contact details to which you can send your cancellation can be found at Contact form.

1.8. Special Functions

Use the following additional functions to manage your documents. You will need a paid tariff for some of these features.

- Auditing Compliance
- Versioning
- Advanced encryption for documents
- Metadata and Document Properties

1.8.1. Auditing Compliance

Our application has received a software certification according to IDW PS880. This confirms that documents can be stored online and in an audit-proof manner when the application is properly used. You can find additional information on the topic security on our website. You can decide which documents or folders are archived in an audit-proof manner and thus comply with the GoBD.

> **Note**
>
> - You cannot change the audit-proof documents until the date has passed.
> - You cannot change the retention period later.
> - You cannot revoke the auditing compliance.

Audit-proof documents

You can mark individual documents as audit-proof. This is necessary if, for example, you want to archive invoices and comply with the legal storage periods. You recognize audit-proof documents by the paragraph symbol in the column Status.

This is how it works

1. Select the document you want to mark as audit-proof in the file list.
2. Click on **Edit > Audit-proof** in the document options.
3. Set the retention period and click on **Next**.
4. Click on **Confirm** to store the document in an audit-proof manner and close the dialog.

Audit-proof folder

You can mark entire folders as audit-proof. You recognize audit-proof documents by the paragraph symbol in the column Status. If you add new documents to this folder, they will automatically be marked as audit-proof.

This is how it works

1. Navigate to the folder you want to mark as audit-proof.
2. Click on **Edit folder > Audit-proof**.
3. Set the retention period and click on **Next**.
4. Click on **Confirm** to mark the folder as audit-proof and close the dialog.

1.8.2. Versioning

You can version documents within the application. This allows you to better track changes to documents, for example.

Uploading a new document version

You can upload new versions of existing documents. The previous version is not deleted in this process. By default, you will always see the latest version of the document.

This is how it works

1. Select the document you want to version in the file list.
2. In the document options, click on**Versioning > New version**.
3. Click on **Select** to upload the new version.
4. Click on **Save** to apply the new version and close the dialog.

Viewing a previous document version

You can still see earlier versions of documents.

This is how it works

1. Select the document you want to view in the file list.
2. In the document options, click on**Versioning > History**.
3. Select the version of the document you want to view.

1.8.3. Advanced Encryption for Documents

All documents in the Account of a user are always stored encrypted. You can find additional information on the topic security on our website.

1.8.4. Log in using the identity card (German only)

Here you will find all the information about logging in with the new identity card.

> **Warning**
> This function can be used only in Germany and with a German identity card.

Requirements for Logging in with an Identity Card

You will need the following to log in with your identity card:

- A German identity card with the online identity card function.
- A suitable card reader.
- AusweisApp 2.

If you fulfill these prerequisites, you can link your existing account with the identity card and log in securely in the future.

Linking Your Identity Card with a foxdox Account

You want to link your German identity card with your account.

This is how it works

1. Open your browser and log in.
2. Click on the gear wheel and then select **Account**.
3. Select **Identity card** from the options.
4. Click on **Link identity card**.
5. Follow the instructions in AusweisApp 2 and authenticate yourself. After the link has been established, you can also log in with your identity card.

Questions and Answers about Logging in with your Identity Card

Here you will find frequently asked questions and answers about logging in with your identity card.

Does the identity card replace logging in with my user name or e-mail address?

No, you can still log in with your user name or e-mail address. To do so, simply log in using your identity card and a six-digit PIN when you log in with your identity card.

Can I deactivate the login process with my user name and e-mail address?

No. Unfortunately, this is not possible.

Why do I need the AusweisApp, and where does it even come from?

The software AusweisApp 2 is a trustworthy software component that is being developed by Governikus KG on behalf of the German Federal Ministry of the Interior. This development is taking place according to the strict specifications issued by the Federal Office for Information Security in Germany, or BSI for short. You can find additional information on the AusweisApp website.

Why is the login process secure?

Logging in using the identity card is a two-factor authentication.

The factors “having” and “knowing” protect you. You must have your identity card at hand and know its six-digit PIN.

What happens if I lose my identity card?

Please contact your authority or your Citizens Registration Office in Germany to find out what you need to do in this case. After you have received a new identity card, you need to link it with your account again.

What do we store from your ID card?

We can only request information from the service- and card-specific identifier of the identity card (pseudonym function).

But that does not mean we know the pseudonym and could use it somewhere else. The identity card contains a chip that can act as a small computer and perform new calculations. If we query the pseudonym, a value valid only for us is calculated. We store this value so it can recognize you the next time you log in.

How can I log in even more securely?

Assign a secure password. The following generally applies: the more characters your password contains, the more secure it is. That is why the password you assign should be as long as possible and also contain special characters, numbers, and letters (both uppercase and lowercase).

But do note that your account is only as secure as the password for your e-mail account!

1.9. Frequently asked questions

In this topic you will find solutions to frequently asked questions.

1.9.1. Can I protect my account with two-factor authentication?

You can provide additional protection for your account with two-factor authentication. You can find more information about setting it up in the article Setting up two-factor authentication.

1.9.2. Why do I not see a document preview?

You can display many common file formats directly. However, if you cannot open a certain file, try downloading it and opening it locally on your device. Click on **Download** in the document options and open the file on your device.

1.9.3. What do I have to do if I have lost the key file and forget my key password?

If you forget the key password, you can reset it using the key file. If you can no longer find the associated key file, we recommend that you create a new key. If necessary, you can disable the encryption of the documents.

> **Note**
>
> - You cannot use the new key to decrypt documents that were encrypted with the old key.
> - Request the required documents from your provider again.

You have the following options:

- If you decide to create a new key, see Creating a Key for instructions.
- If you decide to disable the encryption, see Reversing Encryption for instructions.

If you only forgot your password and you still have your key file, find a manual for resetting the password under What do I have to do if I forget my key password?

1.9.4. What do I have to do if I did not receive an activation key by e-mail?

In order to use your account, you must first confirm your e-mail address. For this purpose, we will send you an activation key by e-mail. If you have not received this activation key or if it has expired, you can independently request a new activation key.

> **Note**
>
> - Check if your account is already activated before requesting a new activation key. Simply log in for this.
> - Check your inbox and spam folder before requesting a new activation key.
> - You can request an activation key only once per hour.

This is how it works

1. Open the login page in your browser.
2. Click on **Activation key > Request again**.
3. Enter your e-mail address in the corresponding field and click on **Request**.
4. Click in the e-mail you received from us on **Activate** to activate your account and to be able to log in.

1.9.5. What do I have to do if I forget my password for my account?

If you have forgotten the password for your account, you can reset it yourself.

This is how it works

1. Open the login page in your browser or the app on your smartphone.
2. Click on **Forgot password**.
3. Enter your e-mail address in the corresponding field and click on **Request**.
4. Click in the e-mail you received from us on **just click here**.
5. Enter a new password on the page that opens and click on **Confirm**.

1.9.6. What do I have to do if I forget my key password?

If you forget the key password, you can reset it. You need the key password to open encrypted documents.

> **Note**
>
> - You need the key file to reset the password.
> - You downloaded the key file when you first logged in. The file extension is **<filename>.fdpk**. The name of the file is a sequence of numbers and letters. These character strings have been created individually per key. For example, you can search for the file extension **fdpk** on a data carrier.

This is how it works

1. Click on the gear wheel icon and then select **Account > Keyring**.
2. Select the key for which you want to reset the password.
3. Click on **Edit > Import**.
4. Upload the exact key file that is displayed in the **Import key** dialog.
5. Enter a password hint and a new password.
6. Click **Import**.

The valid password is the new password just entered.

1.9.7. What do I have to do if my activation key does not work?

If your activation key is no longer valid, please check if your account is already activated. To do so, please log in to the browser or app. If you receive a notice that your account has not yet been activated, you can request a new activation key. If you have forgotten your password, reset it. You can find out how to reset your password at hier.

1.9.8. What are the restrictions when using two-factor authentication?

Two-factor authentication provides an additional degree of security for your account. However, activating two-factor authentication results in the following restrictions:

- You cannot use Windows sync.
- You cannot use the d.velop community apps. Other apps may also be affected and not possible to use.
- Two-factor authentication only protects logins with user names/e-mail addresses and passwords.
- You can only choose one device for generating two-factor codes.
- If you do not have access to your two-factor code, you cannot access your account.

1.9.9. How do I change the settings for sharing usage data?

You can change the settings for the usage data at any time in the account settings. You need to adjust these settings manually in each application.

This is how it works

Web application:

1. Click on the gear wheel icon and then select **Account**.
2. In the **Legal** section, change the **Yes, enable sharing of usage data to help d.velop improve its products** option.

3. Click on **Save** to apply your changes.

Mobile app:

1. Navigate to **Profile > Settings > Info about tracking**.
2. Enable or disable the tracking function in the app.

1.9.10. How do I change the standard document type of a folder?

Suppose you have created a folder and it is accidentally assigned to a wrong document type, you can change the standard document type afterwards. When you upload new documents to this folder, these documents automatically get the standard document type.

This is how it works

1. Navigate to the folder whose document type you want to change.
2. Click on **Edit folder > Edit**.
3. Select the new standard document type.
4. Click on **Save** to change the new standard document type and to close the dialog.

1.9.11. How do I change my tariff?

If you would like to use additional functions such as the auditing compliance or if you need more memory, you can sign up for a new tariff. You learn how to sign up for a new tariff here.

1.9.12. How do I increase my storage volume?

If you need more memory, you can sign up for a new tariff. You learn how to sign up for a new tariff here.

1.9.13. How can I print a document?

If you want to print a document, you must first download a copy of the document to your device. Then open the document locally on your device and then print the document.

You find more information on downloading documentshere.

You find more information on downloading encrypted documentshere.

1.9.14. How can I recover a document that was unintentionally deleted?

If you unintentionally deleted a document, you can recover it from your recycle bin. You find more information on recovering documentshere.

1.9.15. How can I backup and download my files?

If you want to delete your account, you should download all files from your account to your local disk first. We recommend that you make regular backups of your files. If you want to backup all files at once, you can download the main folder **Documents**.

This is how it works

1. Navigate to the folder you want to download in the folder structure.
2. Click on **Edit folder > Download**, to save the selected folder.

Note

- When you download a folder, this folder is downloaded and saved as a compressed ZIP archive. Before you can open the files, you need to unpack them.
- If you download a whole folder, all subfolders will be downloaded as well.
- Depending on the amount or size of the files in the folder, the download may take some time. If the download takes too long, only download individual folders.
- If there are encrypted documents in your folder, you will be prompted to enter the key password.
- Only documents encrypted with your default key will be downloaded. Non-encrypted documents are always downloaded.
- You will receive a system message if the download is not complete. This message will provide you with a list of all the documents that could not be downloaded. You need to download these documents separate.
- You can also use Windows synchronization to download the files. Please note, that this program does not synchronize encrypted documents.

1.9.16. How can I share encrypted documents?

You cannot share encrypted documents from your account with other users. Documents are encrypted to protect them against unauthorized access. That is why you can decrypt the document only in your account and only with your key password.

If you still want to share the document with another user, you need to undo the encryption first. You can use the function Share to make the decrypted document accessible to your contacts.

1.9.17. Where are my received documents stored?

If you receive documents from a provider (for instance, your employer), these documents are always stored in the folder **Inbox > <Provider name>**. To see any of your documents, you can navigate to the relevant folder in the folder structure and open the document. Note that the folder structure may vary by provider.

1.10. Additional information sources and imprint

If you want to deepen your knowledge of d.velop software, visit the d.velop academy digital learning platform at https://dvelopacademy.keelearning.de/.

Our E-learning modules let you develop a more in-depth knowledge and specialist expertise at your own speed. A huge number of E-learning modules are free for you to access without registering beforehand.

Visit our Knowledge Base on the d.velop service portal. In the Knowledge Base, you can find all our latest solutions, answers to frequently asked questions and how-to topics for specific tasks. You can find the Knowledge Base at the following address: https://kb.d-velop.de/

Find the central imprint at https://www.d-velop.com/imprint.