

Upload Documents using SafeSend Exchange

The drop-off link below can be used to securely upload and deliver documents to our firm. The document transfer is fully encrypted and safe to use.

Please note: The maximum amount of data that can be sent via a drop off link is **3GB**.

1. Click the drop-off link provided below.
2. Enter your **Email** address.
3. Enter your **First Name**.
4. Enter your **Last Name**.
5. Click the **Remember Me** checkbox to have your email address and name auto-populate the next time you use a drop-off link.
6. Ensure the document is being sent to the correct **Recipient**. This will default to Main Office, which you do not need to change unless specifically requested by Shelby & Thorpe.
7. Type a **Subject** for the message.
8. Type a **Body** for the message.
9. Click **Attach File(s)** to select the document(s) to upload.
10. Click **Send** to generate an access code.

The screenshot shows the SafeSend Exchange interface for Hatfield & Associates. The form is divided into 'From' and 'To' sections. The 'From' section includes fields for Email (with a red callout 2), First Name (with a red callout 3), Last Name (with a red callout 4), and a 'Remember Me' checkbox (with a red callout 5). The 'To' section includes a recipient field (with a red callout 6) and a 'Subject' field (with a red callout 7). Below these is a rich text editor for the message body (with a red callout 8). At the bottom of the form are an 'Attach File(s)' button (with a red callout 9) and a 'Send' button (with a red callout 10).

11. Enter the access code sent to your email address.
12. Click **Authenticate** to send the document(s) to the firm.

The screenshot shows the 'Enter the Access Code' dialog box overlaid on the SafeSend Exchange interface. The dialog box features a shield icon with a checkmark and the title 'Enter the Access Code'. Below the title, it says 'Please enter the One-Time Access Code sent to your email address alyse.hooper@safesend.com'. A note indicates 'Code will expire in 20 minutes.' The code '9 9 8 4 3 3 8 1' is displayed in a row of input boxes (with a red callout 1). Below the code is an 'Authenticate' button (with a red callout 2). At the bottom, it says 'If you did not receive it yet, please check your junk/spam folder.' and provides a 'Resend code' link. The background shows the 'From' section of the form with the email 'alyse.hooper@safesend.com', first name 'Alyse', last name 'Hooper', and the 'Remember Me' checkbox checked.