

## VIRTUAL MAILBOX - Client User Guide

### Access Client Portal.

- To begin, be sure you have verified your email address with us and have received your login information (If not, email [support@dakotapost.net](mailto:support@dakotapost.net) to request a login).
- Go to [www.dakotapost.net](http://www.dakotapost.net).
- Click on “Client Portal” on the top right side of the page. Login Page will appear.
- On the Login Page, enter your e-mail address and password and then click “Login”. *Note: both email address and password fields are case sensitive, email address is always lower-case.*

**Navigating Within Client Portal.** Once you’ve entered Client Portal, there are different options on the menu bar to choose from; **Home, Virtual Mailbox, Request My Mail and Help**. To access any of the drop-down options, hover your mouse pointer over the button on the orange taskbar at the top of your screen and click on the option you would like.

- **Home.** This page has DakotaPost news, messages, and updates, and contact information for client support.
- **Virtual Mailbox.** The Virtual Mailbox puts you, the client, in control of what mail you receive in your requested mailings. You can view mail that you have received in your PMB. You can download, save, or print the scanned document from the Virtual Mailbox. Most importantly, you can decide which piece(s) of mail you want shredded or scanned. This step alone can save you a significant amount in postage costs, reduce the “junk mail” you receive, and allow you to manage the frequency of your mailing requests.
  - To enter Virtual Mailbox, click on the Virtual Mailbox tab on the blue taskbar at the top of the page. Your name, along with four headings labeled **Preview, Date, Scan, Shred, and Delete** will be at the top. They are described further below.
  - **Preview.** The preview column contains thumbnail pictures of the mail that is currently in your PMB or are awaiting further disposition. Click on the thumbnail to enlarge it, and click on the piece again to zoom in.
  - **Scan Piece.**
    - Click “Scan Piece” for mail you want opened and scanned before you have it sent or shredded.
    - Your scan(s) will be viewable in your Virtual Mailbox by 7 pm CST the following business day.
    - A “View Document” link will be below the words “Scan Completed/Date” next to the mail image you requested to be scanned.
    - Click on “View Document” and your scan will load. You can then view, save, and/or print the PDF image. Once you finish viewing, you can select “Shred Piece”, “Delete” or do nothing further and it will be mailed with your next “Request for Mail”.
    - If, for any reason, you have a special request in respect to what you want scanned from the piece (i.e. only the 1<sup>st</sup> page of insurance paperwork), email the special instructions to [virtualmailbox@dakotapost.net](mailto:virtualmailbox@dakotapost.net).
  - **Shred Piece.**
    - Click on “Shred Piece” for any mail you do not want scanned or sent to you.
    - A pop-up box will ask, “Are you sure you want to shred?” Select “OK” or “Cancel”.

- If you selected "OK" and realized you didn't want to shred that piece, an "Undo" link will appear in the spot where the "Shred Piece" link was previously. "Undo" is only available at that time. If you log off, the option is not longer.
  - Your shred request will be fulfilled by 7pm CST the following business day. **Important: Do not DELETE an item, until the associated Shred task is completed. Deleting an item also deletes our 'task' to shred.**
  - **Delete.** The delete column gives you the option to delete an item from your inbox. After you have received the item in a mailing, you can select "Delete" to remove the item and keep your inbox current. **Important: Do not DELETE an item, until the associated Scan or Shred task is complete, as this deletes the task from our system.**
  - **Send Piece.** Mail pieces are defaulted to be sent, IF you do not wish to receive, be sure to select **Shred Piece**, otherwise mail will be sent in your next Requested Mailing.
- **Request My Mail.** This is where you request delivery of the mail that we have on hand. As a Virtual Mailbox client, you are not on a set mailing schedule. Your mail will only be sent when you "Request My Mail" as "ONE TIME ONLY". After each delivery, your mail will again be placed on "HOLD" until your next mailing request. With the ability to view what is in your mailbox, you should be able to request your mail less frequently, saving you postage money!
- Click on "Request My Mail" in the blue taskbar at the top of the page.
  - You will be directed to a mailing date and address change form. Simply fill in the blanks provided and click "Submit".
  - If you have requested a scan or shred, please wait until you see the "Completed/Date" stamp before you Request Your Mail. This will ensure mail is not sent that you didn't want and a scan is completed before the mail is has been shipped.
  - **Mailing Fees. \$2.00 per mailing plus applicable postage**
- **Help.** If you need help with your Virtual Mailbox, you are welcome to contact us via email at [virtualmailbox@dakotapost.net](mailto:virtualmailbox@dakotapost.net) or by phone at 1.800.477.2664.