PodVault - Quick Start Guide

A few clear entries can help the people you trust find what they need. You can build your vault a little at a time.

1. Open PodVault

Sign in to Podplan using your own account and open PodVault from your dashboard. If you already have a vault, choose the 'Enter the vault' option.

2. Register if you are new

Use the email address linked to your Podplan account and create a separate, strong vault password. Choose a password you do not use for other accounts.

3. Add one useful entry

Start with a document location. For example: “Home insurance - policy folder in the study; provider contact details inside.” Do not upload the policy itself.

4. Add the practical details

Work through documents, everyday life, assets, gifts, important people and other notes. The exact section names may differ on screen. Include only what is needed to help someone find the right information.

5. Share access if you wish

Family members should sign in to Podplan using their own accounts. You can choose to give trusted family members who have signed up to Podplan access to your vault by sharing the separate vault password you set. Do not share your Podplan account password.

6. Keep it current

Update entries when something changes. Use the green bell to set your own reminder to review the vault at least once a year.

> Record locations, provider names and useful contacts. Do not enter passwords, PINs, security codes or full bank or card numbers. If you are unsure what to include, ask PodSupport.

Need more help? contact PodSupport.

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