



Advisory guide
Client Portal
User Guide

Welcome to the Bishop Fleming Portal

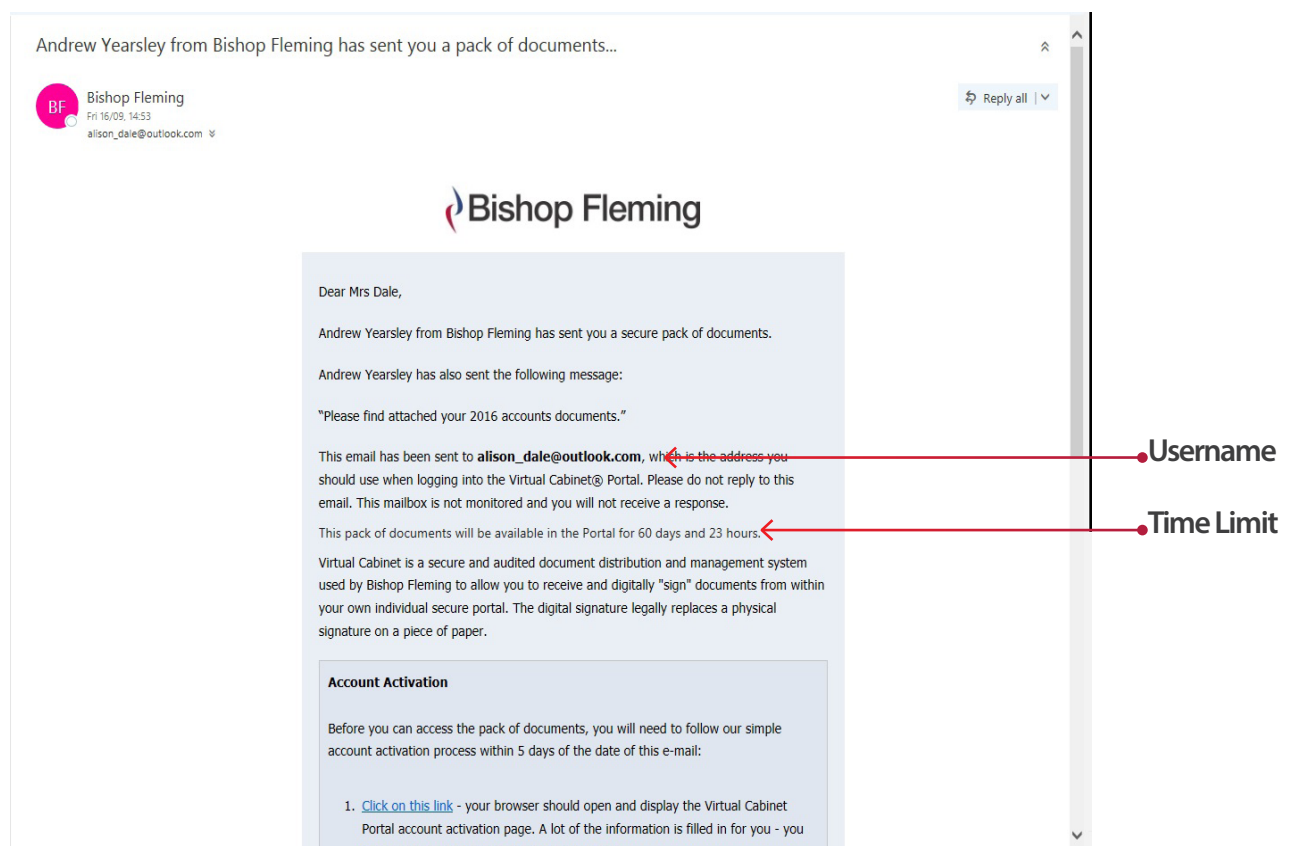
We are delighted to announce the launch of our new Client Portal. The Portal allows you and Bishop Fleming to exchange files very securely and will be replacing email as the way in which we do this in the future.

You will be aware that email is open to interception and imitation, the Client Portal prevents the possibility of this happening to you. The Portal will allow you to digitally sign documents and so will also speed up the process of approving documents. The process of registering on the Portal is very simple, it will happen the first time we send you a document and once set-up this account will form the primary method of file exchange between us.

The following is a step by step user guide that explains in detail how the Portal works, but if you have any questions please don't hesitate to call your usual Bishop Fleming contact.

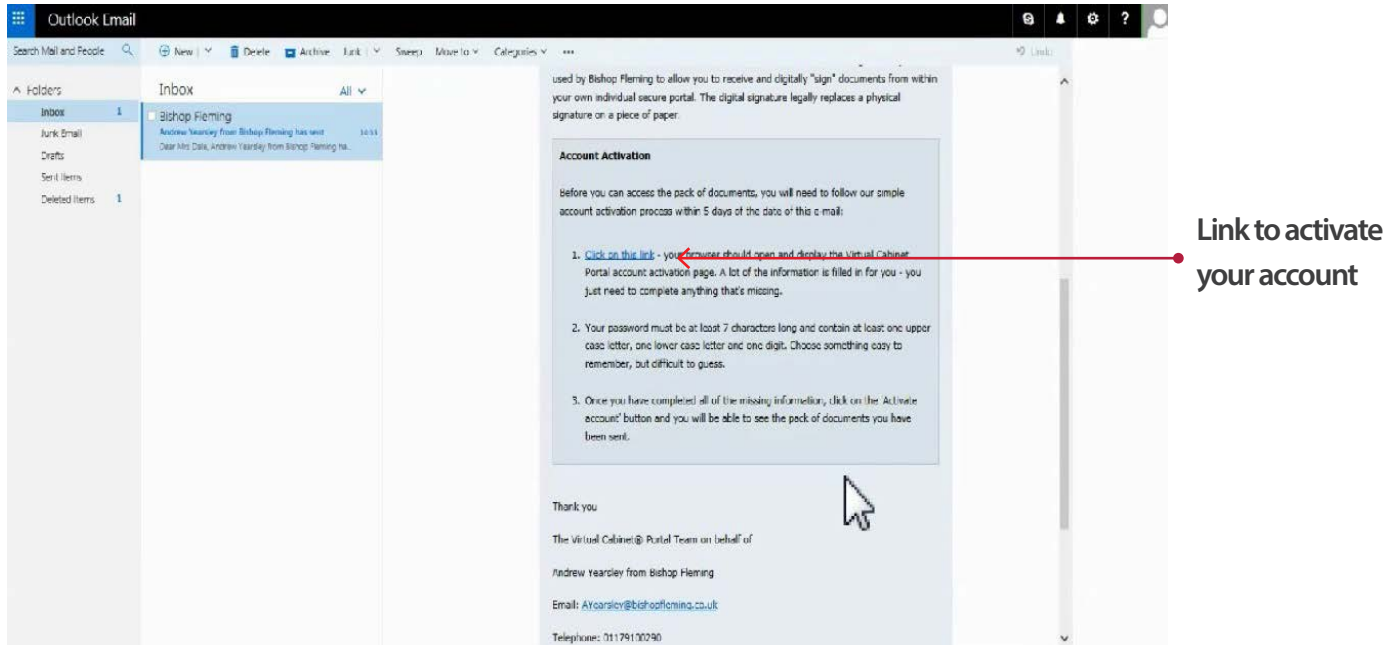
Initial email

When we publish a document to you for the first time, you will receive an email from us. This will be titled clearly with your Bishop Fleming advisor's name, and state that you have received a pack of documents. You will see your user name at the top of this email and you will be notified of any time limit you have to action your document.



Account activation and password creation

1. As this will be your first time using the Client Portal, you will need to activate your account. The account activation process will need to be completed within 5 days of the email being sent to you. However, if you haven't completed the process in this time, we will send you a reminder email with a new link.



2. Please use the email address on your account activation email to sign in. Your password must be at least 7 characters, and should contain at least 1 capital, 1 lower case and a number.

3. You will then be asked to confirm your name and contact details. For security reasons and so your device can be recognised in the future, you will need to accept the cookies.

You are able to read terms and conditions by clicking the link displayed.

The image shows two screenshots of the account activation process. The first screenshot is 'Activate your account: Step 1 of 2' and the second is 'Activate your account: Step 2 of 2'.

Activate your account: Step 1 of 2

Welcome to Bishop Fleming's Secure Client Portal

Email address

Password

Confirm your new password

[About our Client Portal](#)

Activate your account: Step 2 of 2 Almost done...

LOGIN DETAILS **PERSONAL DETAILS**

Title

First name

Last name

Date

Country

Telephone number

Mobile number

☐ I agree to the use of cookies on this device to enhance my experience. [Further information](#)

☐ I agree to the [Terms & Conditions](#)

[Accept Cookies](#)

[Terms and Conditions](#)

[Activate account](#)

Navigation of your account

You are now in the client portal, viewing your pack of documents. You will find your messages displayed in the left hand column, and you can also view the list of documents published to you in this pack. Any instructions such as 'Please read here and sign' are shown here as well.

The icons at the bottom can be used to zoom in and out and rotate the document as you please.

The screenshot displays the '2016 Accounts for Signing' page. On the left, a sidebar contains a 'Messages' section with a message from Andrew Yearsley dated 16 SEP 2016, and a 'Documents' section with a 'Cover Letter' document dated 16 SEP 2016. The main area shows the 'Cover Letter' document, which is marked as 'PRIVATE & CONFIDENTIAL' and includes a signature from Andrew Yearsley. At the bottom right, a toolbar contains icons for zooming in/out, rotating, and downloading the document. Red arrows point to these icons with labels: 'Zoom in/out', 'Rotate', and 'Download'. Other red arrows point to the 'Messages' and 'Documents' sections in the sidebar with labels: 'Messages', 'Documents', and 'Action required'.

To move to the next document, you can click on the next one on your list.

Signing documents and leaving a message

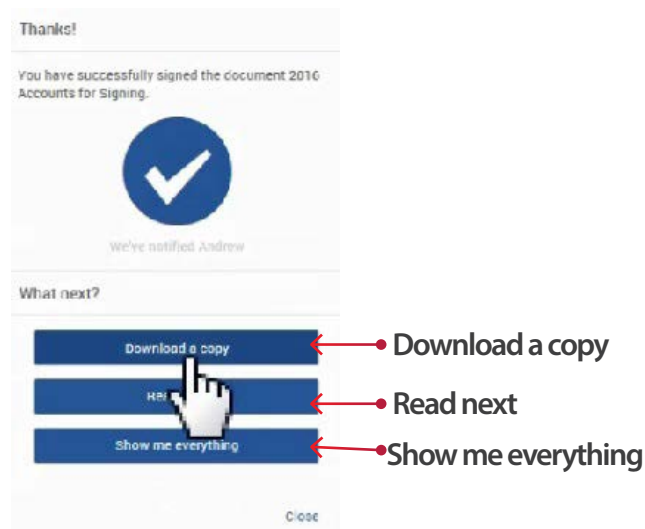
You can digitally sign the document required using the button at the top of the document.



This gives you the option to leave a message for us prior to clicking the blue 'Sign' button.

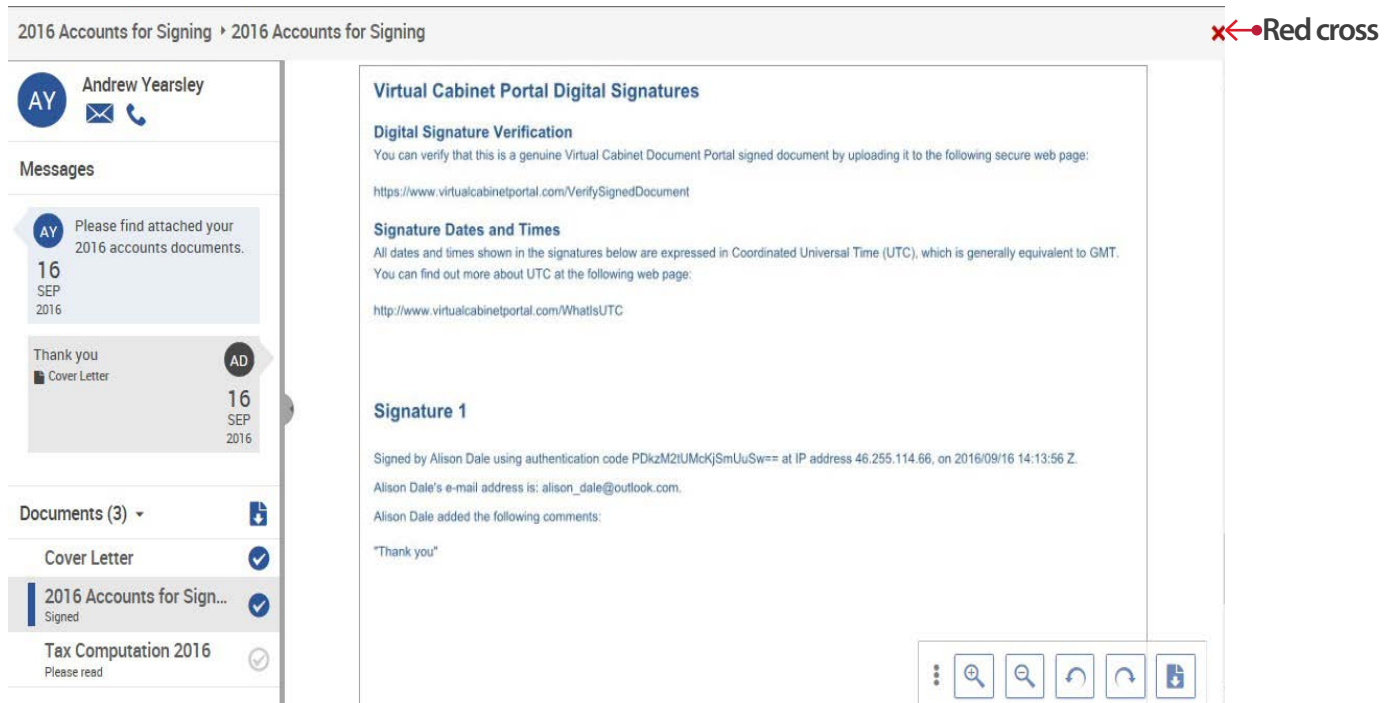
The 'Signing Statement' form contains a 'Message' field with a text area for leaving a message. A red arrow points to this field with the label 'Message'. Below the message field is a 'Your Signature' section with a list of information that will be contained in the signature: 'information that identifies you', 'any message you have entered above', and 'your current I.P. address (46.255.114.66)'. At the bottom of the form are 'Sign' and 'Cancel' buttons.

You can now either download a copy of your signed document, read the next document, or go back to your portal home screen.



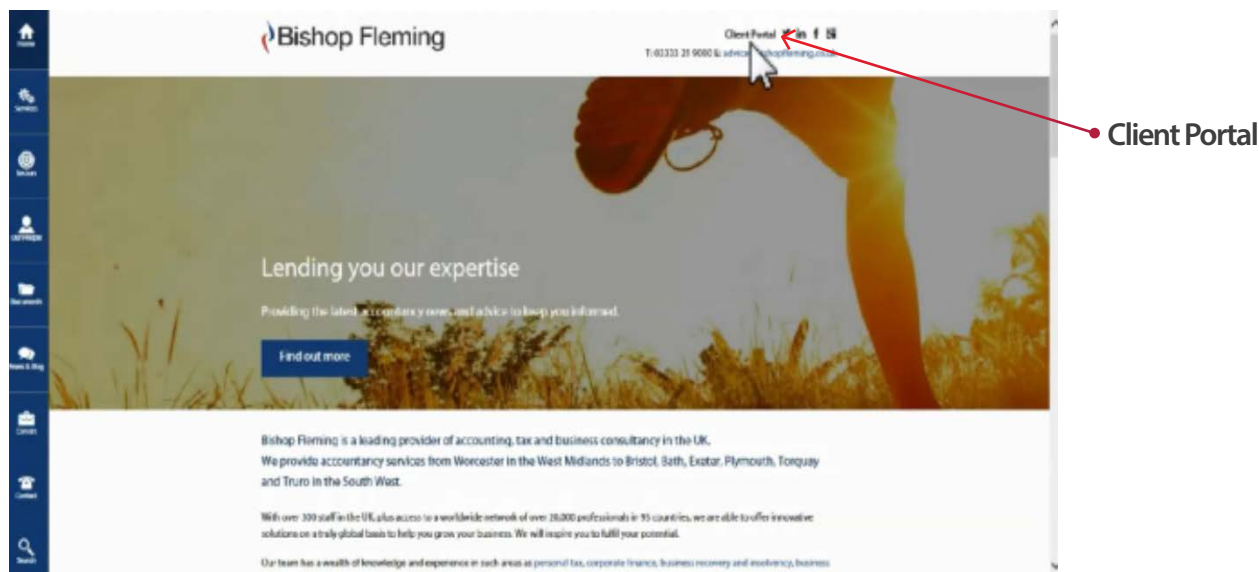
Alternatively, if you simply close the message, you can view your signature information added to the end of your document.

Click on the red cross in the top right hand corner to close the pack and return to your portal home screen.



Sending us a document

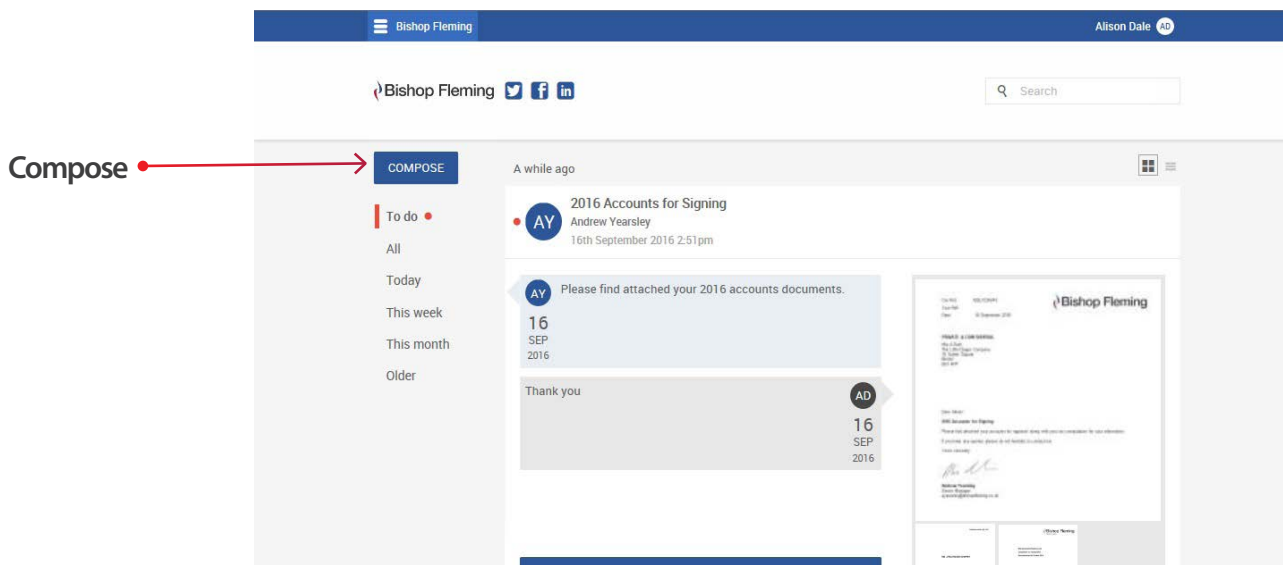
Click on the Client Portal link which can be found in the top right hand corner of any page of our website.



1. Sign in with your username and password.

A screenshot of the Bishop Fleming Client Portal login form. It features the company logo at the top, followed by a text input field for the username, a password input field, and a blue 'Sign in to our secure portal' button. Below the button, there are links for 'Remember my email address?', 'Having problems?', and 'About our Client Portal'. Social media icons for Twitter, Facebook, and LinkedIn are also present.

2. Select 'Compose'.

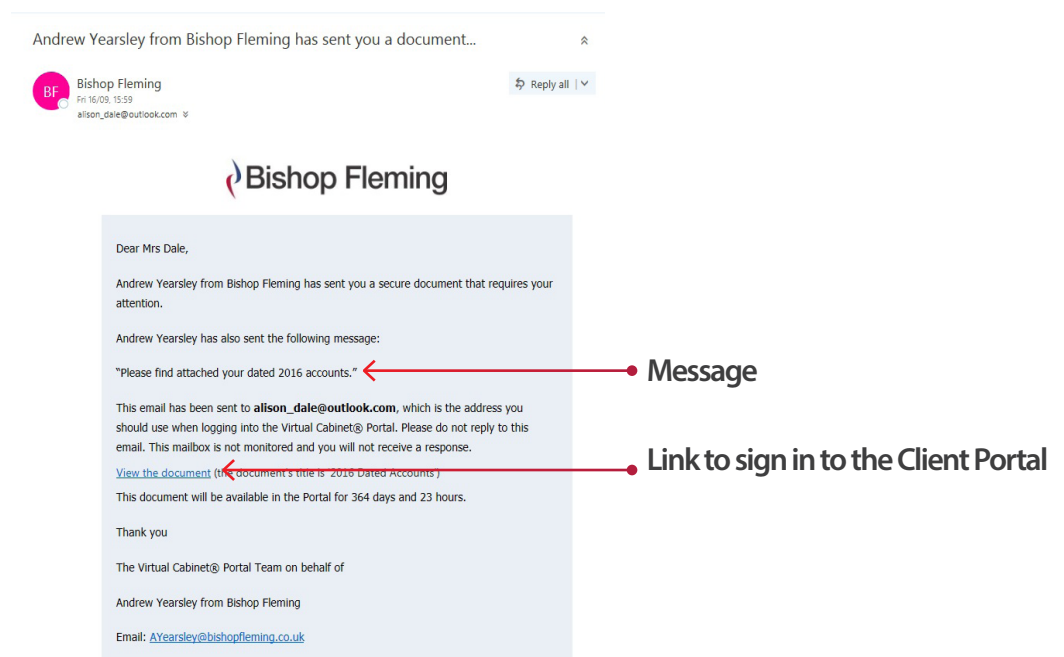


You can only send a document to a Bishop Fleming advisor who has previously issued a document to you. Documents must be a maximum size of 95mb per file.

Please contact us if you need to send us a document, but have not been registered onto the client portal.

Future published documents

You will receive an email notifying you of further documents for you to read and/or sign, as well as the length of time you have to view and action the document. This email also tells you who it is from and their message to you. By clicking the link provided you will then need to enter your username and password.



Once you have signed in, you will then be straight into your new document.

Further assistance

If you require further assistance with the Portal please visit [our client portal page](#) for our FAQ's, or contact your usual Bishop Fleming representative.

☎ 03333 219 000
✉ advice@bishopfleming.co.uk
🌐 www.bishopfleming.co.uk



To find out how we can help you or your business, contact us:

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E: advice@bishopfleming.co.uk

W: bishopfleming.co.uk



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