Advisory guide
Client Portal
FAQs

Client Portal FAQ's

Why is the Portal more secure?

The Bishop Fleming Portal is powered by Virtual Cabinet who have a team of experts to ensure that the latest technologies and best practice is used to ensure the Portal remains a secure environment.

Encryption.

Data is highly encrypted in transit to and from the portal using Extended Validation SSL certification provided by the industry leading certificate issuer, VeriSign. Notice the green address bar when you log into the portal - this means that all traffic to and from the site couldn't be more secure.

Data, documents and files (where applicable) stored in the portal are hashed or encrypted using AES-256.

Data Storage.

In addition to the expected alarms, CCTV, electromagnetic locks, security bars, cages and locked server cabinets, our specialist, UK based, data hosting sites use biometric security measures to protect the live, standby, backup and storage devices on which your data resides across multiple geographical locations.

Penetration.

The Portal is secured behind multiple firewalls. It has been hardened to resist attack methods such as brute force password ciphers, cross-site scripting (XSS), cross-site request forgery (CSRF), JSON hijacking and SQL injection. All hardening is tested and verified by 3rd Party Security specialists.

Auditing.

Every action that occurs within the portal is logged and recorded against the individual that performed it, providing a complete and compliant audit log.

Safe Browsing.

To help ensure the Portal website is safe for browsing it is scanned daily for malware by security experts Symantec.

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Your simple, safe and secure document portal

What will the Portal be used for?

The Portal will be used to exchange documents securely and obtain authorisation/signatures when required. Some examples are:
You want to send us paperwork with regards to your tax or accounts affairs. You would upload this through the Portal directly to the appropriate person at Bishop Fleming.
We want to send you your accounts for signature. We would upload this to your secure portal and request that the document is signed. You would then log on and view your accounts through the Portal and if happy would electronically sign them.

How do I register?

If we usually send your tax return to authorise via email we will automatically register you at the appropriate time. For other documents, like Accounts, we will ask you before what your preference is at the time of sending. If we don't currently use email for authorisation then you can request to move to the secure Portal. All we will need is the email address you wish to use.
When we register you, you will receive an email to setup your secure portal. You simply need to follow the link in the email and complete the required information, including setting your password and recovery information. At no time will Bishop Fleming have access to your password and any future reset will be done on a self-service basis.
If you don't want to use the Portal then you can continue to receive documents in the post. Please let us know if this is the case.

How will I receive notifications that something is in the Portal?

When we publish documents to you, you will receive an email notification from notifications@virtualcabinetportal.com. The senders name for this email will show as 'Bishop Fleming' and the subject line will be 'xxx from Bishop Fleming has sent you a pack of documents…'.
The body of the email will then give you instructions of how to register if it is the first time we have sent something to you or will give you a link to access the documents if you have already registered.

Multiple organisations?

You will be registered on the Portal using your email address. So assuming that you use the same email address for all the organisations we deal with, then you will only have one Portal account.
However, if you would like to use different email addresses then we will be more than happy to register multiple accounts for you. Please contact us if that is the case.

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The person is not listed, how do I send?

The Portal requires that a secure communication channel is setup between you and the person at Bishop Fleming that you want to send the document to.
This needs to be initiated by us so please contact the appropriate person and they will send you a request for documents.

Is the document always available on the Portal?

Documents will be available for 1 year. If you want a copy of a document you can download it to your PC. When we publish final versions of documents, they will be there indefinately.

I've forgotten my password. How do I reset it?

Please visit our Portal log in page and select " Having problems?" From here you will be able to enter your email address to reset your password.

How do I change my password?

To change your password, log into the Portal and select your name on the upper-right corner. Then, select 'profile' followed by 'edit password'.

My display name isn't correct. How can I change this?

Log into the Portal and select your name at the top right of the page. Select profile, and edit your name.

My internet security package is preventing me from accessing the Portal. What can I do?

Ensure that https://www.virtualcabinetportal.com/ is showing as a "Trusted Sites" list within the security package's setup.

My account is 'locked.' What does this mean and how can I unlock it?

An account will become locked when too many failed password attempts have been entered. You will need to navigate to the 'Problems logging in?' page on http://www.virtualcabinetportal.com, which will take you through a password reset process to unlock your account.

I am expecting an email from the Portal, but it hasn't come through?

You will need to add notifications@virtualcabinetportal.com to your trusted senders / white list. Any email received before this may be held within your junk folder, spam filter or possibly blocked before your mailbox.

When trying to sign a document via my mobile phone or tablet, I am presented with an "authenticating browser" screen that will not load. What should I do?

You may need to clear all cookies, cache and re-authenticate your browser. However, it's recommended to use WiFi where possible, as your identity will be the same IP each time.

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

T: **03333 21 9000**
E: **advice@bishopfleming.co.uk**
W: **bishopfleming.co.uk**

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