

Advisory Guide

Client Document Portal Guide



Welcome to the Client Document Portal

At Bishop Fleming we take data security very seriously and we therefore have a portal to facilitate the secure sharing of sensitive information, which also provides a useful storage location for documents such as Tax Returns or Accounts.

You will have multiple portals where we act for you in different capacities. For example, if we provide services to you in a personal capacity and you are also a director of a company we provide services to, you will have separate portals for each to ensure data remains segregated and secure. On the landing page you can also see your recent activity of documents listed on the right of the page. Remember to bookmark this page for quick and easy access to use in the future.

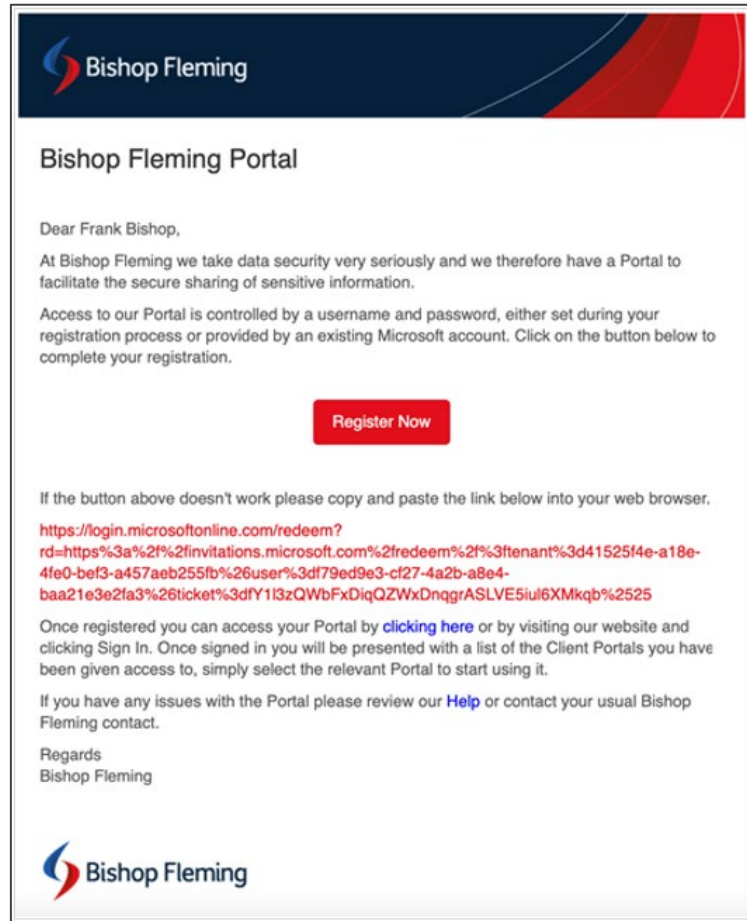
Registration for the Portal is triggered by us, so this will either happen the first time we need to send you something, or if you need to provide us with information you can request access from your usual Bishop Fleming contact.

The following is a step-by-step user guide and explains in detail how the Portal works.

Registration

The first time we add you to the Portal you will receive a registration email. This email, and any future Portal emails will come from clientportal@bishopfleming.co.uk so please add this to your safe sender list.

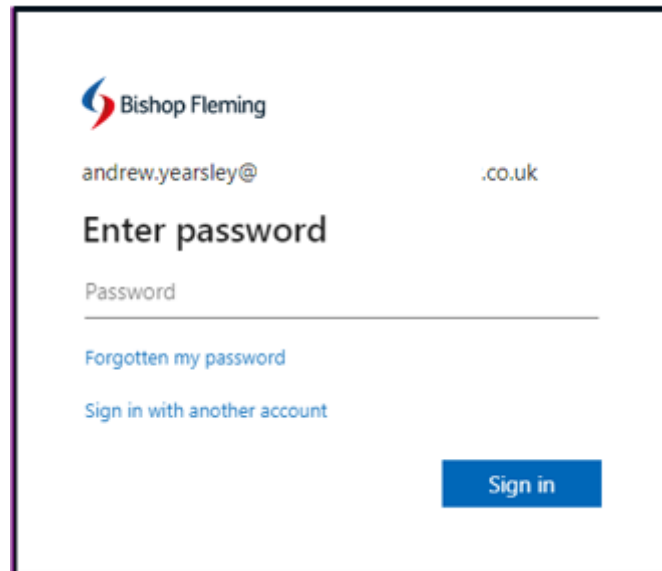
1. From your initial email, select **Register Now**



Depending on whether you already have a Microsoft account or not will affect the next steps. If you already have a Microsoft account you will use that to sign in, if you don't you will authenticate as a guest.

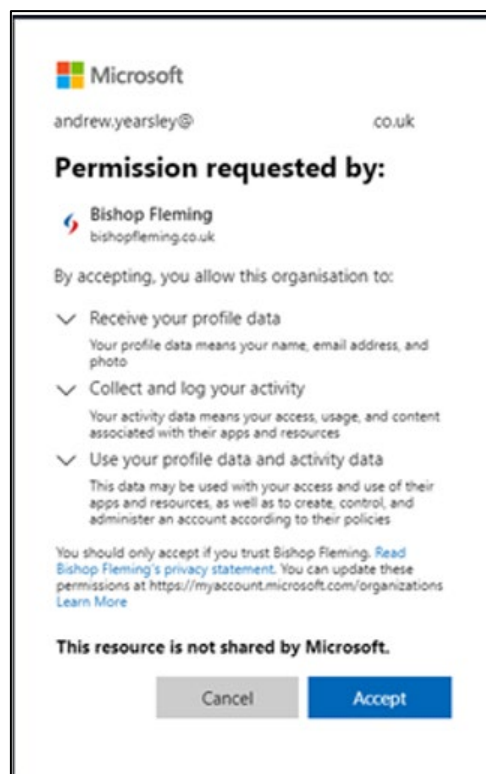
Existing Microsoft Account

If you have an existing Microsoft Account you will either, be signed in automatically or prompted to enter your password, this will depend on your usual experience of signing into your account.



The image shows a login screen for Bishop Fleming. At the top left is the Bishop Fleming logo. Below it, the email address 'andrew.yearsley@' is entered, and '.co.uk' is shown to the right. The main heading is 'Enter password'. Below this is a password input field with the placeholder text 'Password'. There are two links: 'Forgotten my password' and 'Sign in with another account'. A blue 'Sign in' button is at the bottom right.

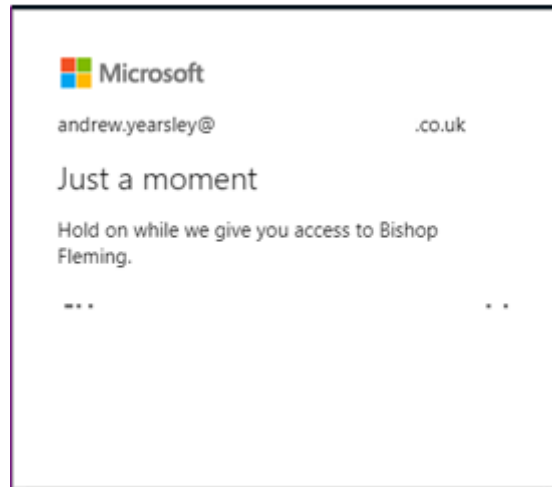
You will then see the following notification, [Permission requested by Bishop Fleming.](#)



The image shows a Microsoft permission request dialog. At the top is the Microsoft logo. Below it, the email address 'andrew.yearsley@' is entered, and '.co.uk' is shown to the right. The main heading is 'Permission requested by:'. Below this is the Bishop Fleming logo and the email address 'bishopfleming.co.uk'. The text 'By accepting, you allow this organisation to:' is followed by three permissions, each with a checkmark icon and a description: 'Receive your profile data' (Your profile data means your name, email address, and photo), 'Collect and log your activity' (Your activity data means your access, usage, and content associated with their apps and resources), and 'Use your profile data and activity data' (This data may be used with your access and use of their apps and resources, as well as to create, control, and administer an account according to their policies). Below these is a note: 'You should only accept if you trust Bishop Fleming. [Read Bishop Fleming's privacy statement.](#) You can update these permissions at <https://myaccount.microsoft.com/organizations> [Learn More](#)'. At the bottom, it says 'This resource is not shared by Microsoft.' and there are 'Cancel' and 'Accept' buttons.

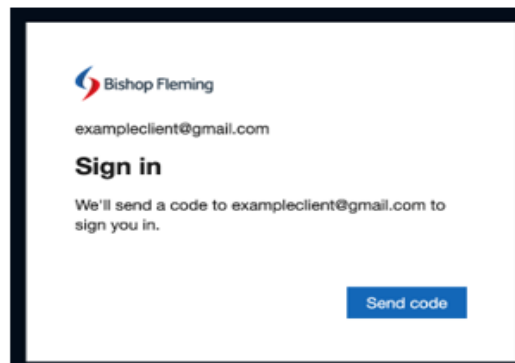
Select **Accept**

You will briefly see the following message and then be presented with the Portal Landing Page, Refer to the section: [Portal Landing Page](#).



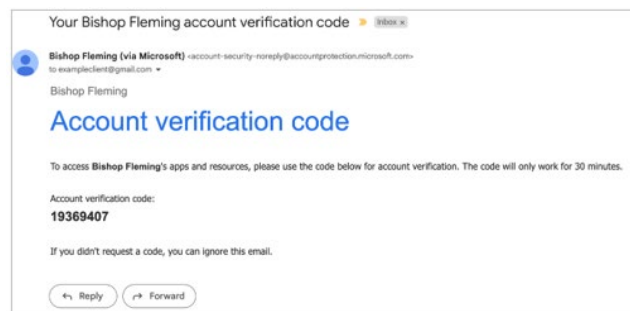
Non-Microsoft Account

If you do not have a Microsoft Account, you will be prompted with the following Sign In screen each time you access the Portal.

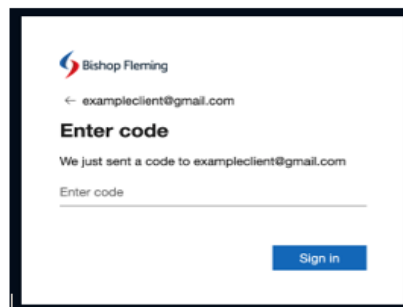


Select **Send Code**

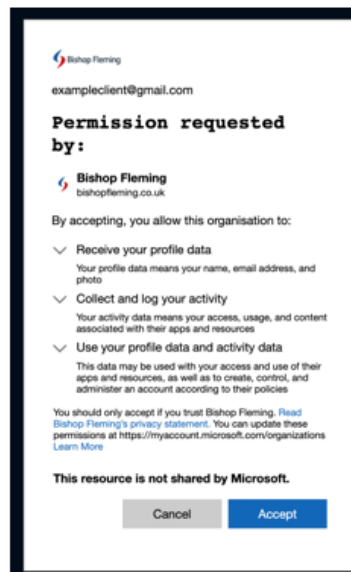
You will receive an email with the subject "Your Bishop Fleming account verification code", open this email and copy the included code.



Go back to your web browser and enter the code and click **Sign In** on the following screen.



The following notification appears, Permission requested by Bishop Fleming.

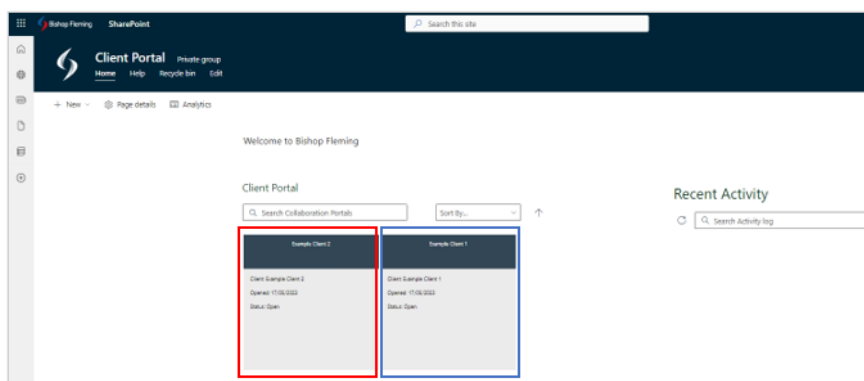


Select **Accept**

You are now presented with the Portal Landing Page.

Portal Landing Page

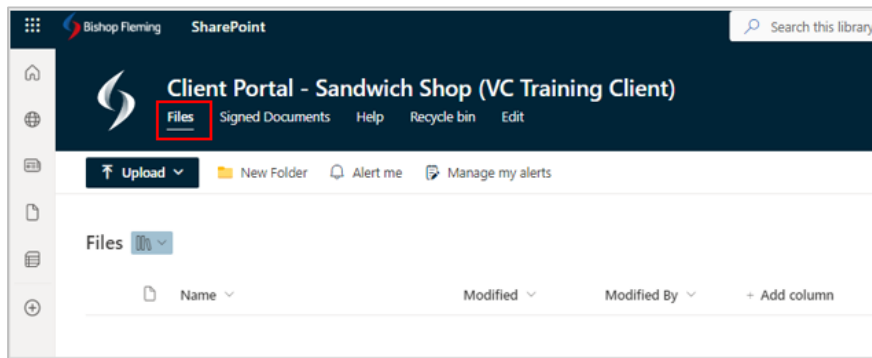
Whenever you login to the Portal you will be presented with the Portal Landing Page, this will give you a list of all the Portals that you have been given access to.



To access a Portal, select the **Portal Tile**, e.g., Example Client 1
This will then log you into that specific Portal.

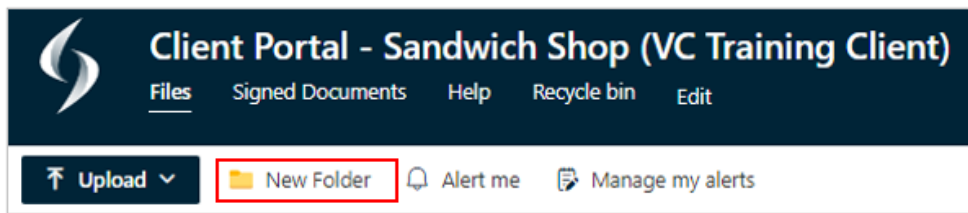
Files

The Files area can be used to securely share files, either by us or you, and can be organised into folders for easier management. You can subscribe to alerts to be notified when we upload a file for you.



Create a Folder

1. Select the **Files Tab**
2. Select **New Folder**



3. Enter the folder name e.g., Statutory Accounts 2023

A screenshot of the 'Create a folder' dialog box. It has a text input field containing 'Statutory Accounts 2023' and a 'Create' button at the bottom right.

4. Select Create

A screenshot of the SharePoint interface for the 'Client Portal - Sandwich Shop (VC Training Client)'. The 'Files' tab is selected. The table shows the newly created folder 'Statutory Accounts 2023' and a file 'BACS Transmission-7350610.docx'.







Name	Modified	Modified By
Statutory Accounts 2023	A few seconds ago	Sunita Kaur
BACS Transmission-7350610.docx	Yesterday at 04:43 PM	Intapp Document Creator

Upload Files

Within the client portal, you can upload Individual Files or whole Folders.

1. To upload files to the portal, select **Upload**, then select **Files**
2. Navigate to the location of the files and select the file(s)
3. Select **Open**

The Files has been uploaded.

Files			
 Upload  New Folder			
 Name	Modified	Modified By	
 Accounts A.docx	A few seconds ago	Sunita Kaur	
 Accounts B.docx	A few seconds ago	Sunita Kaur	
 Draft Accounts 2023	Yesterday at 01:11 PM	IntappAdminUser1	








Upload Folders

1. To upload a folder, select **Upload**, then select **Folders**
2. Navigate to the location of the **Folder**, to select the Folder

A prompt will appear, notifying you of how many files to upload to this site

3. Select **Upload**

The folder and contents of the folder have been uploaded.

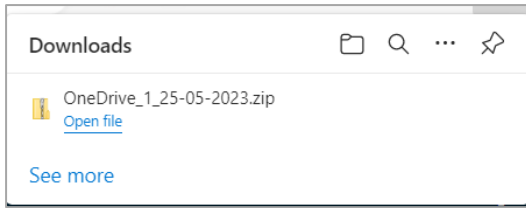
Files			
 Upload  New Folder			
 Name	Modified	Modified By	
 Draft Accounts	A few seconds ago	Sunita Kaur	
 Draft Accounts 2023	Yesterday at 01:11 PM	IntappAdminUser1	
 Accounts A.docx	10 minutes ago	Sunita Kaur	
 Accounts B.docx	10 minutes ago	Sunita Kaur	

Download Files

You can download files and folders from this area

1. To download individual or multiple files, select each item by clicking the circle check box that appears to the left of the filename.
2. Select the **Download** button (at the top of the page)

This will download as a zip file in File Explorer

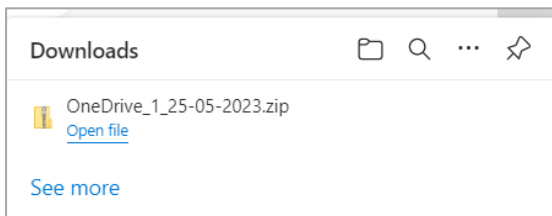


3. Select **Open File**, the files have appeared in File Explorer in the Downloads area.

Download Folders

You can download Folders and their content.

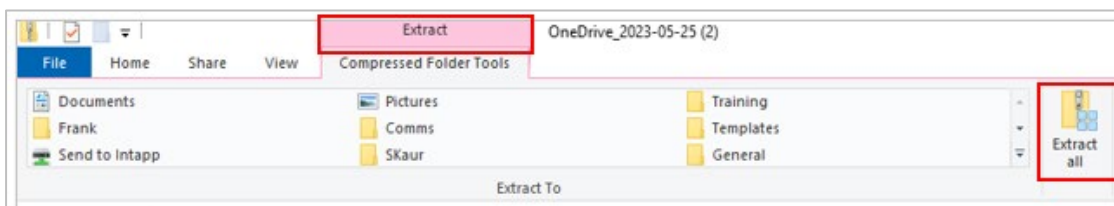
1. To download a folder and its content, select the circle check box that appears to the left of the Folder.
 2. Select the **Download** button (at the top of the page)
- This will download as a zip file in File Explorer



3. Select **Open File**

The Folder has appeared in File Explorer in the Downloads area.

4. To view the contents within the folder, select the folder
5. In the Ribbon, the **Extract Tab** is selected, you will need to specify a destination where you would like to extract the files to.

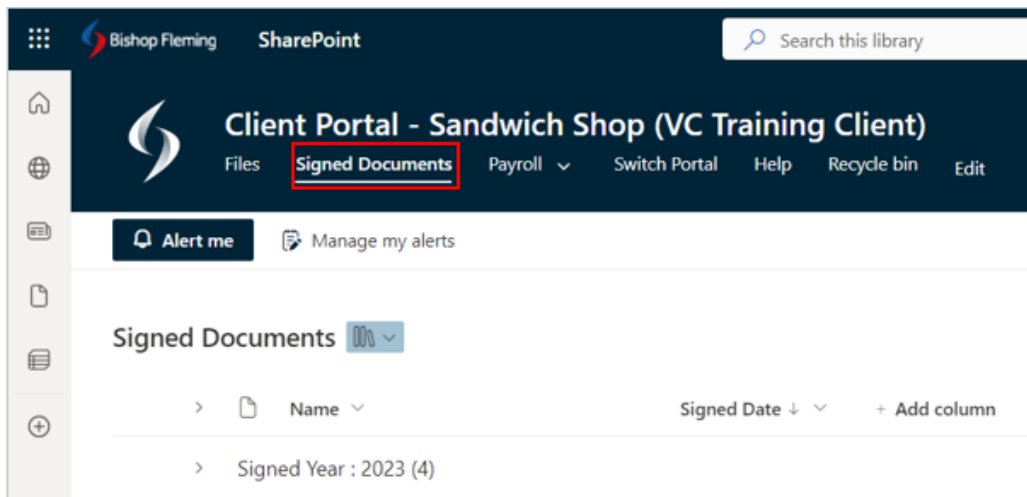


6. Select **Extract All** (if required, you can browse to select another location to extract to)
7. Select **Extract**

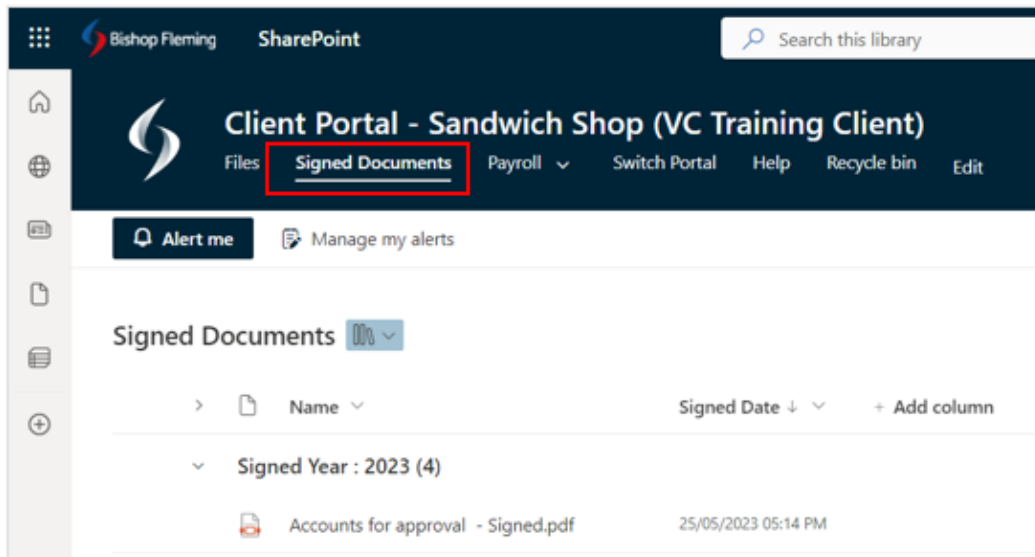
Double click the folder to see all the files within the folder.

Signed Documents

The Signed Documents area will contain copies of any documents that have been signed through the Signature Portal. These documents will be grouped by year.



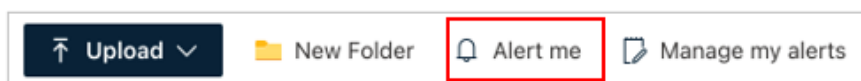
1. Expand the signed year to see the documents



You can download copies of these documents if required.

Alert Me

You can set up an alert to get notified whenever a file, or folder is changed across all areas in the Document Portal. Depending on the item file or folder, you may see different options when you set an alert. For example, you may want to be alerted when someone has changed a document you created or specify how frequently you want to receive alerts on a particular document, being daily, weekly or monthly. To see the Alert Me options available, view the information below:



1. Select **Alert Me**

The Alert Me page opens in a new tab, where you can define how you want your alerts set, using the following options:

- **Alert title:** Enter the title of this alert. This is included of the subject of the notification sent for this alert.
- **Send Alerts to:** You can enter usernames or email address, separate them with a semi colon.
- **Delivery Method:** Specify how you want the alerts delivered e.g., email
- **Change Type:** Specify the type of changes that you want to be alerted to i.e., all changes/new items are added/existing items are modified/items are deleted.
- Send alerts for these changes: for example, send alerts when anything changes/someone else changes a document/someone else changes a document created by me/ someone else changes a document last modified by me.
- **When to Send Alerts:** Here you can specify how often to receive the alerts, immediately, daily or weekly.
- Choose the options as required and select **OK**

You will receive an email Alert, the new alert created i.e., 'Files' has successfully been added on the client.

- You will receive alerts according to the delivery method, timing and criteria that were selected when the alert was created.
- You can change this alert or any of your other alerts using Manage My Alerts.

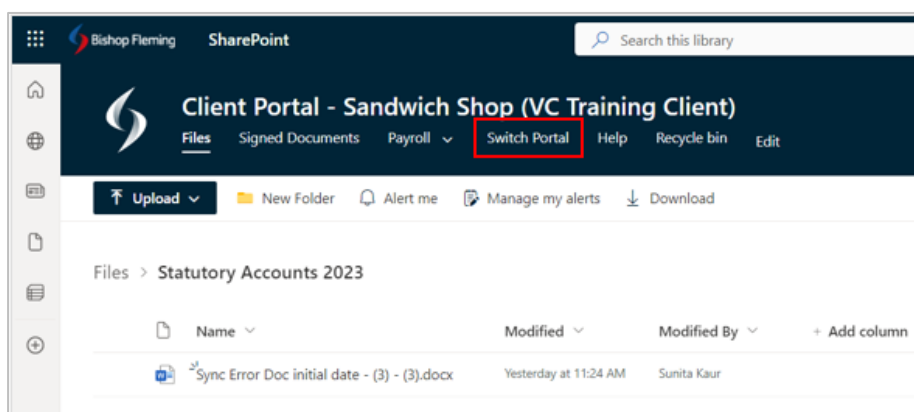
Manage My Alerts

In this section you can manage alerts by adding new alerts or deleting alerts or even click on an existing alert to modify it.

1. Select **Manage My Alerts**
2. Select Add/delete or edit the existing alert

Return to the Portal Landing Page

1. To return to the Portal Landing Page, select the **Switch Portal** button.



Further assistance

If you haven't been registered by us and wish to make use of the Client Document Portal to send us documents, or if you have any questions please email clientportalsupport@bishopfleming.co.uk and one of our team will get back to you as soon as possible. Our support team are available from Monday - Friday 9am-5pm.



Bishop Fleming is a trading name of Bishop Fleming LLP, a limited liability partnership registered in England and Wales No. OC391282, and Bishop Fleming Bath Limited, a limited company registered in England and Wales No. 07869428. Registered offices: Stratus House, Emperor Way, Exeter Business Park, Exeter, Devon EX1 3QS. A list of members' names for the LLP is available at the above address.