



Advisory Guide

Signature Portal Guide



Signature Portal

Introduction

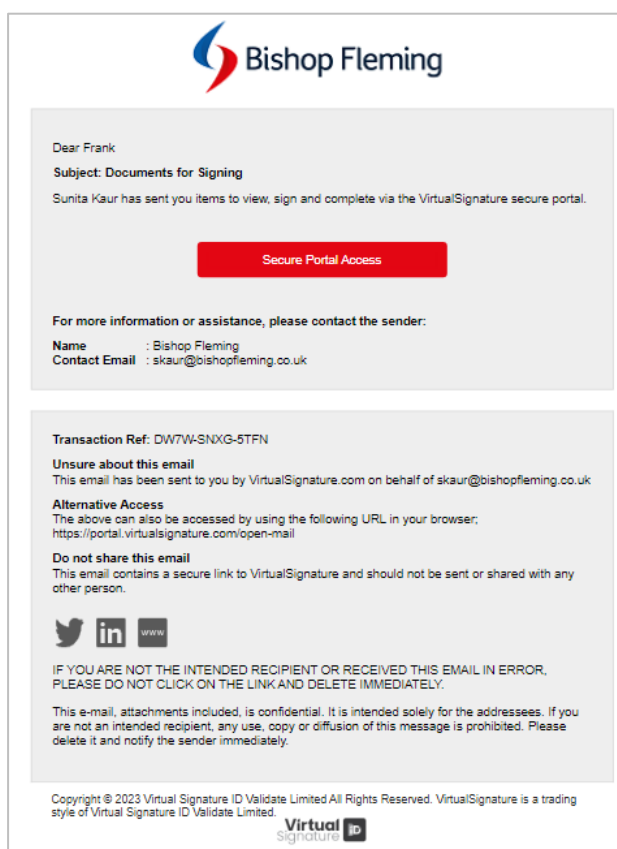
To make our signature processes efficient and to save paper, we try to make use of electronic signatures wherever possible. Our Client Signature Portal is powered by Virtual Signature, this is where we need you to digitally sign documents. When we need you to sign something you will receive an email from your Bishop Fleming contact via Virtual Signature, this will come from donotreply@virtualsignature.com so please add this to your safe sender list.



If we hold your mobile number, you will also receive a text message from BFPortal with a link to sign the document along with an additional layer of security in the form of a One Time Passcode (OTP).

Access Virtual Signature Portal

1. In the email, select **Secure Portal Access**



When the Virtual Signature Secure Portal Access appears, you will just need to type in your first name and surname and confirm you ready to proceed.

1. Enter your **First** and **Surname**

Bishop Fleming

Welcome to the VirtualSignature secure transaction access panel.

In order to sign documents, complete forms or verify identity, please enter your details and carefully follow all instructions.

If you require any information about this transaction, please contact the sender

Thank you

Secure Portal Access

Ref: TKZP-DGCV-SFTF

intapp_training@outlook.com

Forename

Surname

By ticking the box below, you are agreeing to electronically provide and exchange information with the sender.

Please ensure that you read all important instructions carefully.

I confirm that I am ready to proceed ☐

PROCEED

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2. **Tick** to confirm you are ready to proceed and select **Proceed**

Bishop Fleming

Welcome to the VirtualSignature secure transaction access panel.

In order to sign documents, complete forms or verify identity, please enter your details and carefully follow all instructions.

If you require any information about this transaction, please contact the sender

Thank you

Secure Portal Access

Ref: TKZP-DGCV-SFTF

intapp_training@outlook.com

Frank

Bishop

By ticking the box below, you are agreeing to electronically provide and exchange information with the sender.

Please ensure that you read all important instructions carefully.

I confirm that I am ready to proceed ☒

PROCEED

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If we hold your mobile number, the one-time passcode (OTP) will appear as part of the authentication process, we need to send you a 6-digit passcode to your mobile number ending xxx.

1. Select **Send OPT** to continue

Bishop Fleming

Sender

Joe Hanley
jhanley@bishopfleming.co.uk

Transaction Reference

S3ZS-HYYW-J3D5

Subject

Documents for Signing

One Time Passcode (OTP)

Transaction Ref: S3ZS-HYYW-J3D5

As part of our authentication process, we need to send you a 6 digit passcode to your phone number ending in 802.

Click "Send OPT" to proceed.

SEND OPT

If your phone number does not match as listed above, please contact the sender at jhanley@bishopfleming.co.uk

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2. You will receive the 6-digit code on your mobile phone (from Secure OTP), enter the number and click Submit

Bishop Fleming

Sender

Joe Hanley
jhanley@bishopfleming.co.uk

Transaction Reference

S3ZS-HYYW-J3D5

Subject

Documents for Signing

One Time Passcode (OTP)

Transaction Ref: S3ZS-HYYW-J3D5

A 6 digit one time passcode has been sent to your phone number ending 802

694490

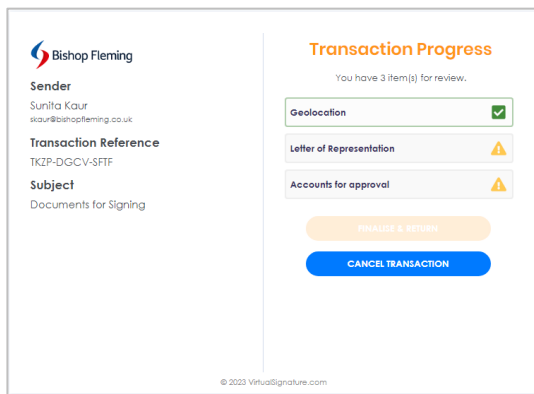
To resend code, [click here](#).

SUBMIT

If you have not received your OTP, please contact the sender at jhanley@bishopfleming.co.uk

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3. The Transaction Progress window appears displaying the document(s) to sign.



The screenshot shows the 'Transaction Progress' window. On the left, it displays the sender's information: Bishop Fleming, Sunita Kaur, and the transaction reference TK2P-DGCV-SFTF. The subject is 'Documents for Signing'. On the right, a progress bar shows three items for review: 'Geolocation' (checked), 'Letter of Representation' (warning icon), and 'Accounts for approval' (warning icon). At the bottom, there are two buttons: 'FINALISE & RETURN' (orange) and 'CANCEL TRANSACTION' (blue).

4. Select the document e.g., Letter of Representation, the document appears for which you are required to add your signature.



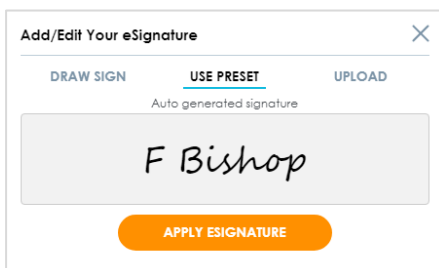
The screenshot shows a document review window for the 'Letter of Representation'. The document content includes the company name 'Joe Bloggs & Sons Limited', the date '10 May 2023', and the subject 'FINANCIAL STATEMENTS FOR THE YEAR ENDED 30 APRIL 2023'. The document is signed by 'F Bishop' on behalf of the board of directors. The window has a 'View Next' button highlighted with a red box.

5. To advance to the placeholder to sign the document, select **View Next**



The screenshot shows a signature placeholder. On the left, there is a 'View Next' button. On the right, there is a placeholder for a signature, with the text 'Yours faithfully F Bishop Sign Here' and 'Signed on behalf of the board of directors'.

6. Click on the Signature placeholder to add your signature. When adding a signature, you can choose to **Draw Sign**, **Use Preset** or **Upload** for your signature.



The screenshot shows the 'Add/Edit Your eSignature' window. It has three tabs: 'DRAW SIGN', 'USE PRESET', and 'UPLOAD'. The 'USE PRESET' tab is selected, showing an 'Auto generated signature' of 'F Bishop'. At the bottom, there is an 'APPLY ESIGNATURE' button.

7. Select **Apply ESignature**

8. On the following screen, select **Submit**, you will then return to the Transaction Progress screen.

Please click Submit to accept this document

Query Attachments **Submit**

Zoom In Zoom Out Reset Zoom Next Input Original PDF

We acknowledge our legal responsibilities regarding disclosure of information to you and confirm that so far as we are aware, there is no relevant information needed by you of which you are unaware.

Each director has taken all the steps that he ought to have taken as a director in order to make himself aware of any relevant information and to establish that you are aware of that information.

As minuted by the board of directors at its meeting on DD MONTH YYYY

Yours faithfully

F Bishop

Signed on behalf of the board of directors

The Transaction Progress window appears

Bishop Fleming

Sender
Sunita Kaur
skaur@bishopfleming.co.uk

Transaction Reference
TKZF-DGCV-SFTF

Subject
Documents for Signing

Transaction Progress
You have 3 item(s) for review.

Geolocation ☒

Letter of Representation ☐

Accounts for approval ☐

FINALISE & RETURN

CANCEL TRANSACTION

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9. Select the next document and repeat the steps from 4 to 8
10. Once all documents have been signed, select **Finalise & Return**

Ready to Finalise & Return?

Please click on the "Finalise & Return" button when ready.

FINALISE & RETURN

If you wish to review any items or cancel this transaction, click [close](#) to return to the transaction progress page.

You have completed the ESignature process, a confirmation window appears

Bishop Fleming

Sender
Sunita Kaur
skaur@bishopfleming.co.uk

Transaction Reference
TKZF-DGCV-SFTF

Subject
Documents for Signing

Thank You
Complete

This transaction has now been completed and a confirmation email has been sent.

You may now close the browser

Click on a document below to view

1. Letter of Representation

2. Accounts for approval

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Once everyone has signed the documents, you will be able to view and download a copy of the document from this final screen or from the Client Document Portal in the Signed Documents area.

Further assistance

If you need further support, 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.



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