Bishop Fleming

Audit · Accountancy · Tax · Advisory

Advisory Guide

Client Portal User Guide

Welcome to the Client Document Portal

At Bishop Fleming we take data security very seriously and we therefore have a client document 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, as you will have separate portals for each to ensure data remains segregated and secure.
On the landing page, you will see your recent activity of documents listed. Remember to bookmark this page for quick and easy access to use in the future.

Registration for the client 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.

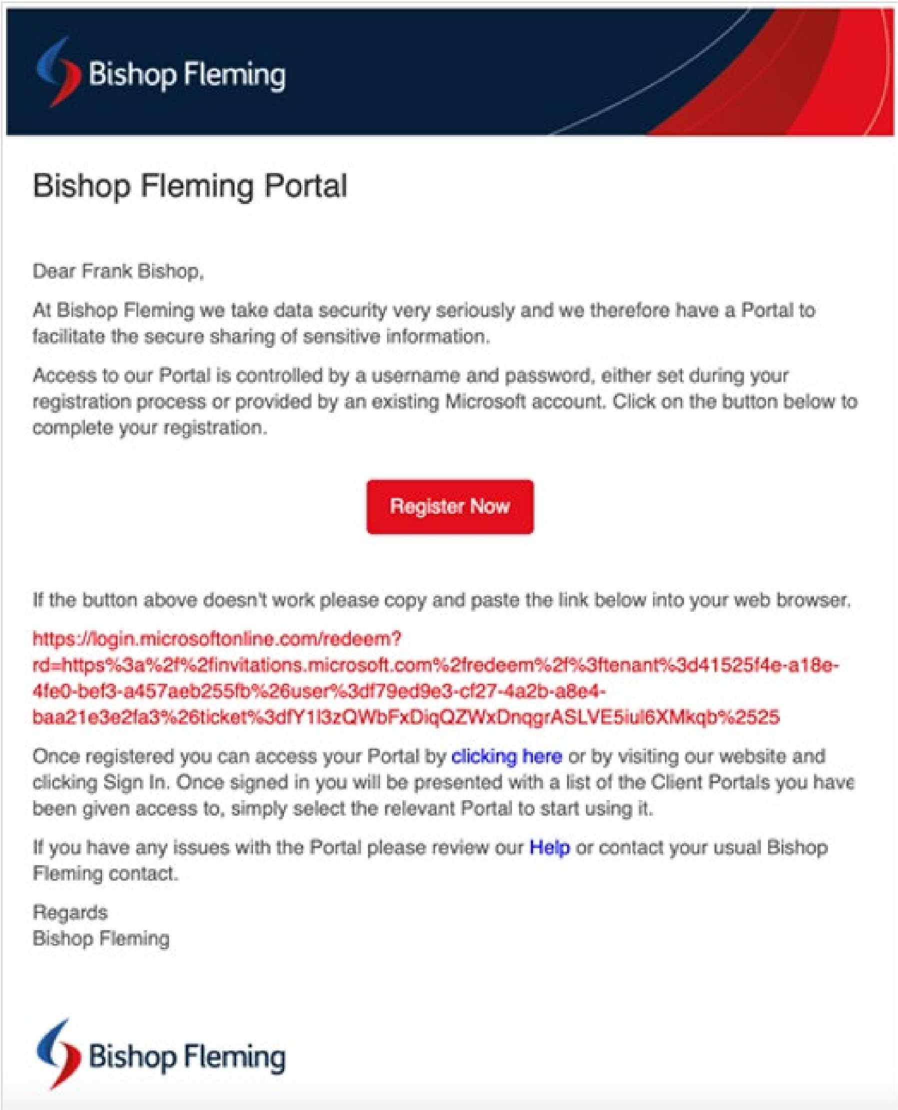
The following is a step-by-step user guide and explains in detail how the client portal works.

Registration

The first time we add you to the client document portal you will receive a registration email. This email, and any future portal emails will come from clientportal@bishopfleming.co.uk.

Note: Please add the email address: clientportal@bishopfleming.co.uk to your safe senders list.

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


Bishop Fleming

Bishop Fleming Portal

Dear Frank Bishop,

At Bishop Fleming we take data security very seriously and we therefore have a Portal to facilitate the secure sharing of sensitive information.

Access to our Portal is controlled by a username and password, either set during your registration process or provided by an existing Microsoft account. Click on the button below to complete your registration.

Register Now

If the button above doesn't work please copy and paste the link below into your web browser.

https://login.microsoftonline.com/redeem?rd=https%3a%2f%2finvitations.microsoft.com%2fredeem%2f%3ftenant%3d41525f4e-a18e-4fe0-bef3-a457aeb255fb%26user%3df79ed9e3-cf27-4a2b-a8e4-baa21e3e2fa3%26ticket%3dfY1l3zQWbFxDiqQZWxDnqgrASLVE5iul6XMkqb%2525

Once registered you can access your Portal by clicking here or by visiting our website and clicking Sign In. Once signed in you will be presented with a list of the Client Portals you have been given access to, simply select the relevant Portal to start using it.

If you have any issues with the Portal please review our Help or contact your usual Bishop Fleming contact.

Regards
Bishop Fleming

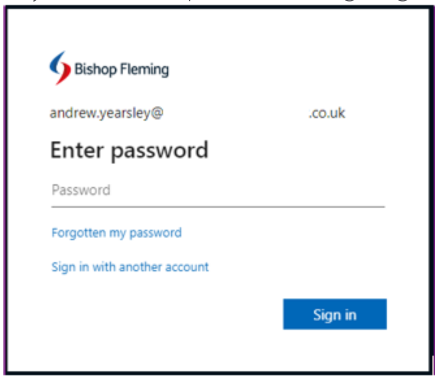
Bishop Fleming

Depending on whether you already have a Microsoft account or not, this will affect the next steps.

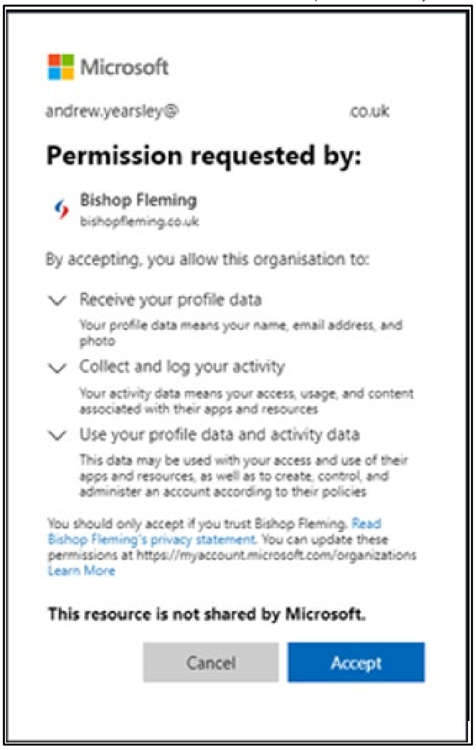
- If you already have a Microsoft account: you will need to use that to sign in.
- If you do not have a Microsoft account: you will need to authenticate as a guest.

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.

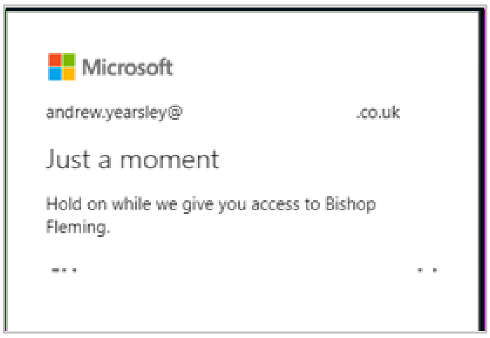


You will then see the following notification: Permission requested by Bishop Fleming.



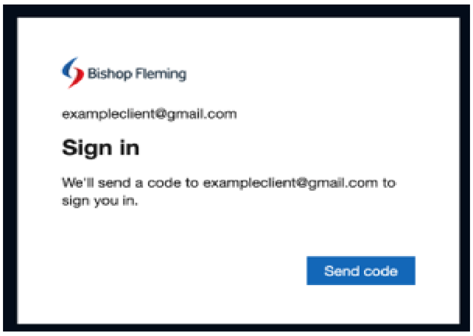
1. Select **Accept**

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



Non-Microsoft Account

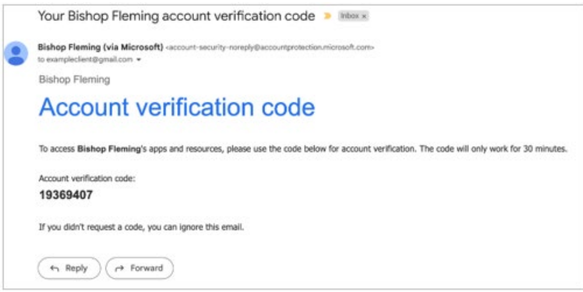
If you do not have a Microsoft Account, you will be prompted with the following Sign in screen each time you access the client portal.



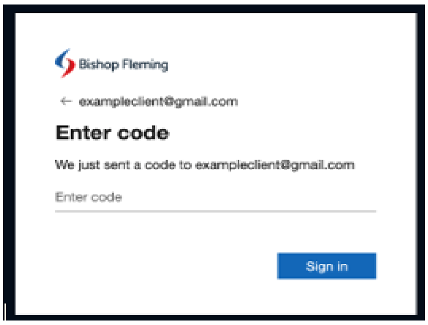
1. Select **Send Code**

You will receive an email with the subject "Your Bishop Fleming account verification code**".**

2. Open the email and **copy** the included code.

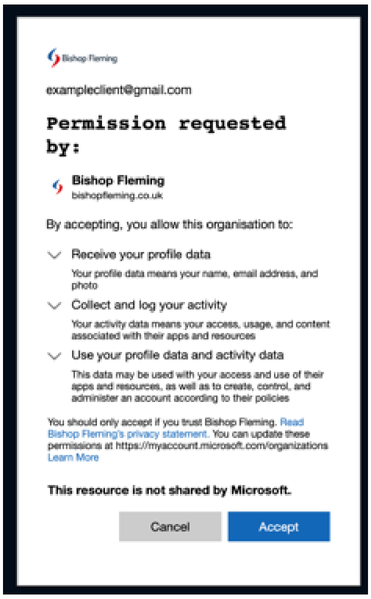


3. Go back to your web browser to enter the code by selecting, **Sign in** on the following screen.



The following notification appears, <u>Permission requested by Bishop Fleming.</u>

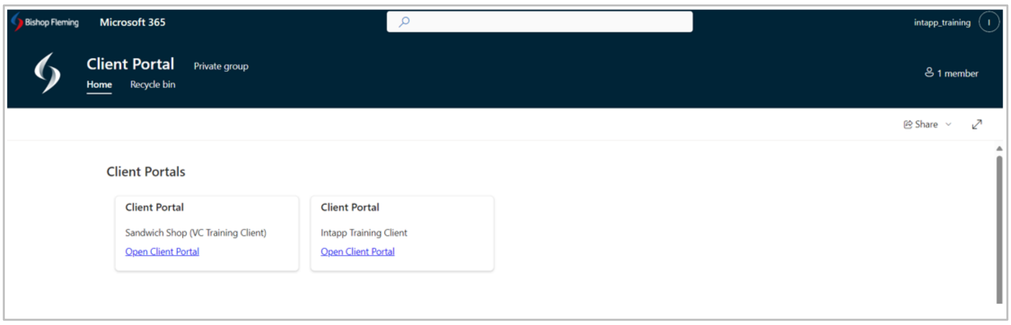
1. Select **Accept**



You are now presented with the client portal landing page.

Client Portal Landing Page

Whenever you login to the portal you will be presented with the client portal landing page, this will give you a list of all the portals that you have been given access to.



1. To access a portal, select **Open Client Portal** on the required portal tile. This will then log you into that specific portal you have access to.

Files

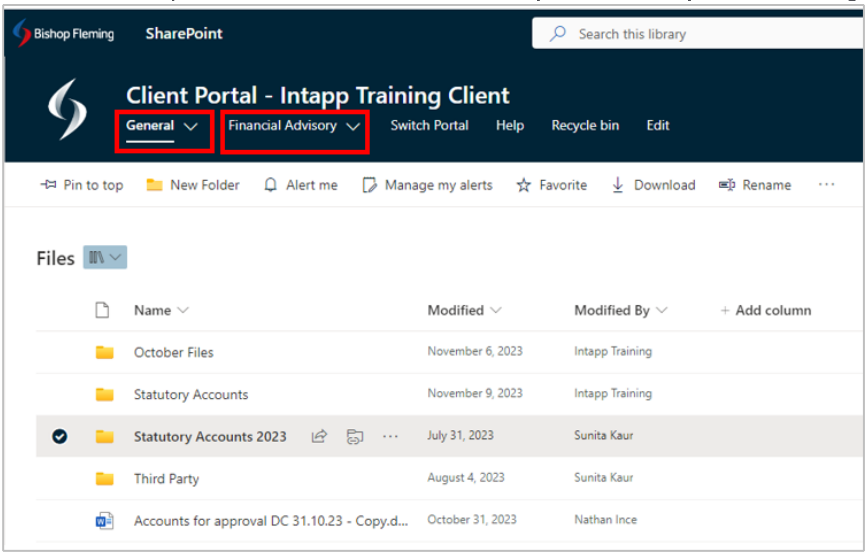
The Files area can be used to securely share files, either by Bishop Fleming or you, and can be organised into folders for easier management. You can also subscribe to alerts to be notified when we upload a file for you. Here you will see the client portal area(s) which are dependent on the service lines we provide for you, such as General and/or Financial Advisory.

- **General** (Audit, Accountancy, Tax & Corporate Finance)
  - **Files area**: share files securely
  - **Signed Documents area**: this will contain copies of any documents that have been signed through the Signature Portal. These documents will be grouped by year, being the year, the document(s) was signed.

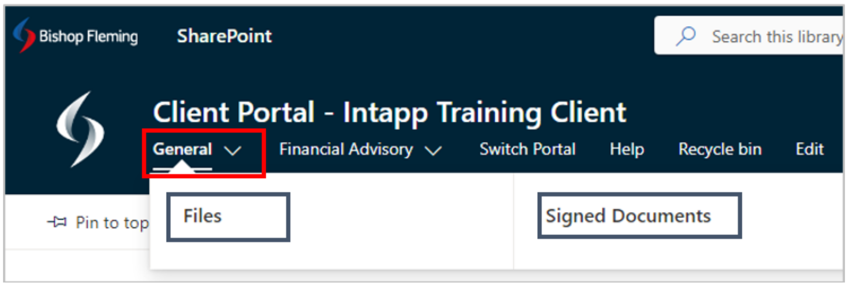
- **Financial Advisory** (BFIFA)
  - **Files area**: share files securely

- **Signed Documents area**: this will contain copies of any documents that have been signed through the Signature Portal. These documents will be grouped by year, being the year, the document(s) was signed.

2. Select the drop - down arrow next to the required client portal area e.g., **General**

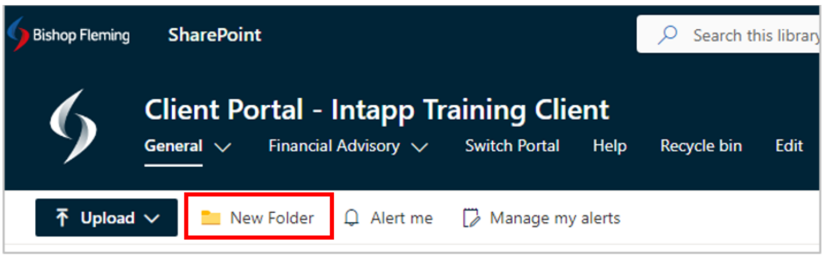


3. Either select Files or Signed Documents.

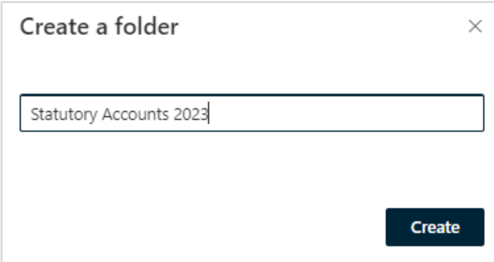


Create a Folder

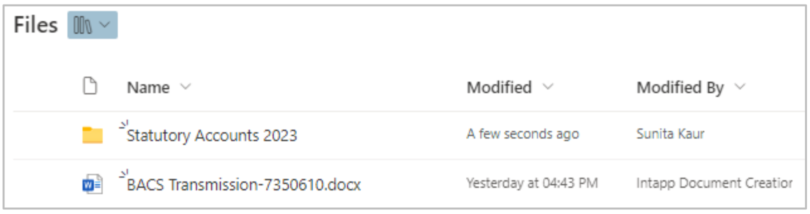
1. Select the **Files Tab**
2. Select New **Folder**



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



4. Select Create

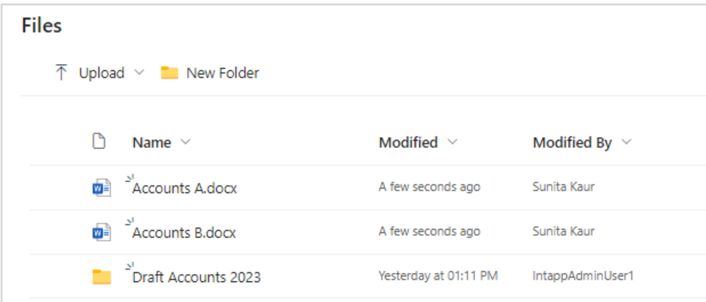


Upload Files

Within the client portal, you can upload Individual files or whole folders.

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

The Files has been uploaded.



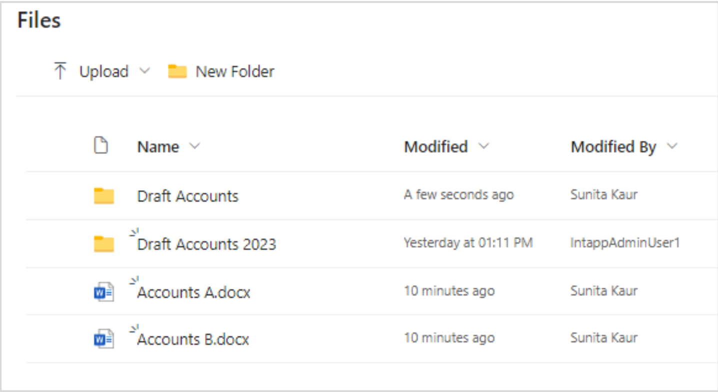
Upload Folders

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.

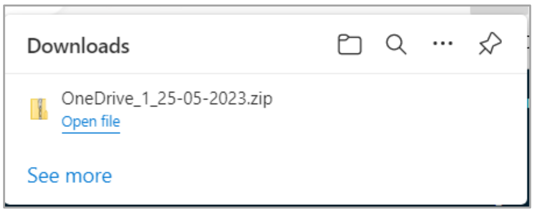


Download Files

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



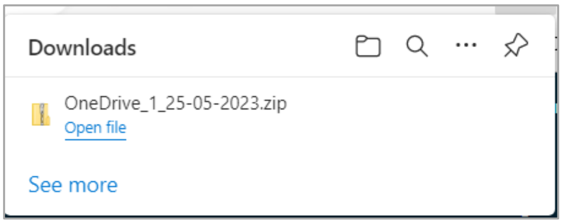
3. Select **Open File**, the files have appeared in File Explorer in the Downloads area.

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)

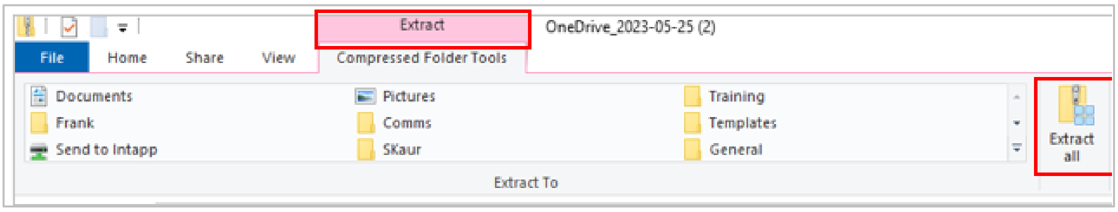
This will download as a zip file in File Explorer



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.

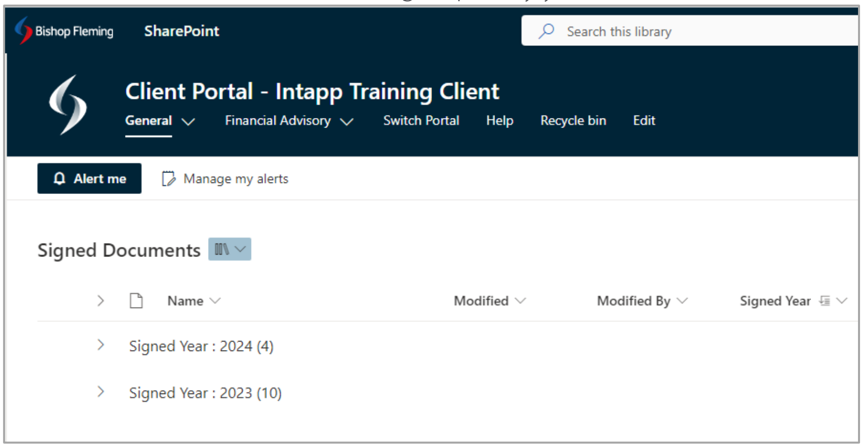


6. Select **Extract All** (if required, you can browse to select another location to extract to)
7. Select **Extract**

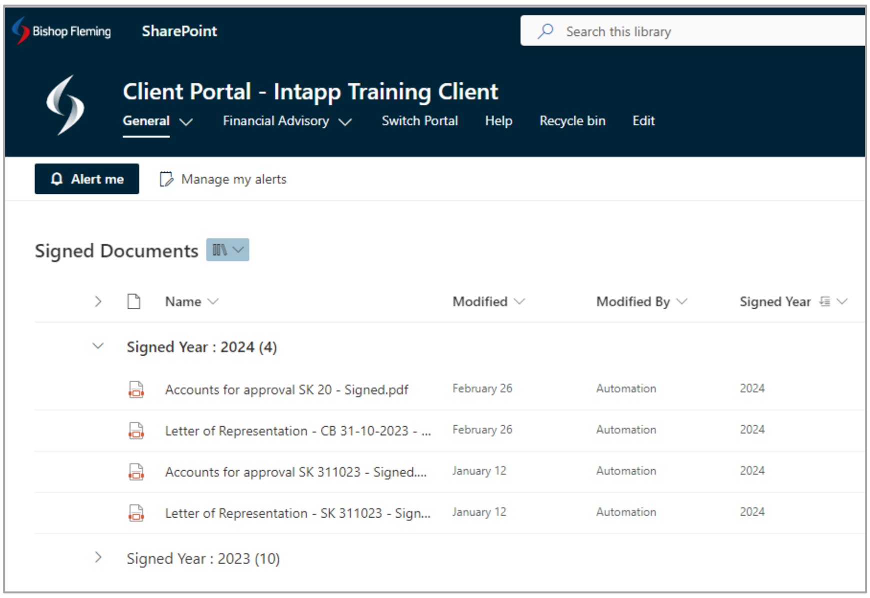
Double click the folder to see all the files within the folder.

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 a list of the documents by selecting the arrow next to the year.



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 client 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 a title for the alert as this is included of the subject of the notification sent.
- **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:** 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, '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.

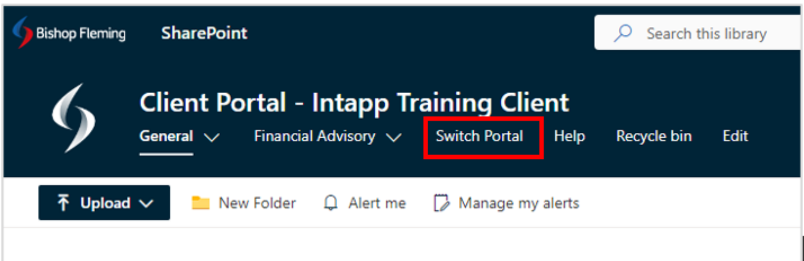
Manage My Alerts

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

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

Return to the Portal Landing Page

1. To return to the client 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 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

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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.

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KRESTON GLOBAL