

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.

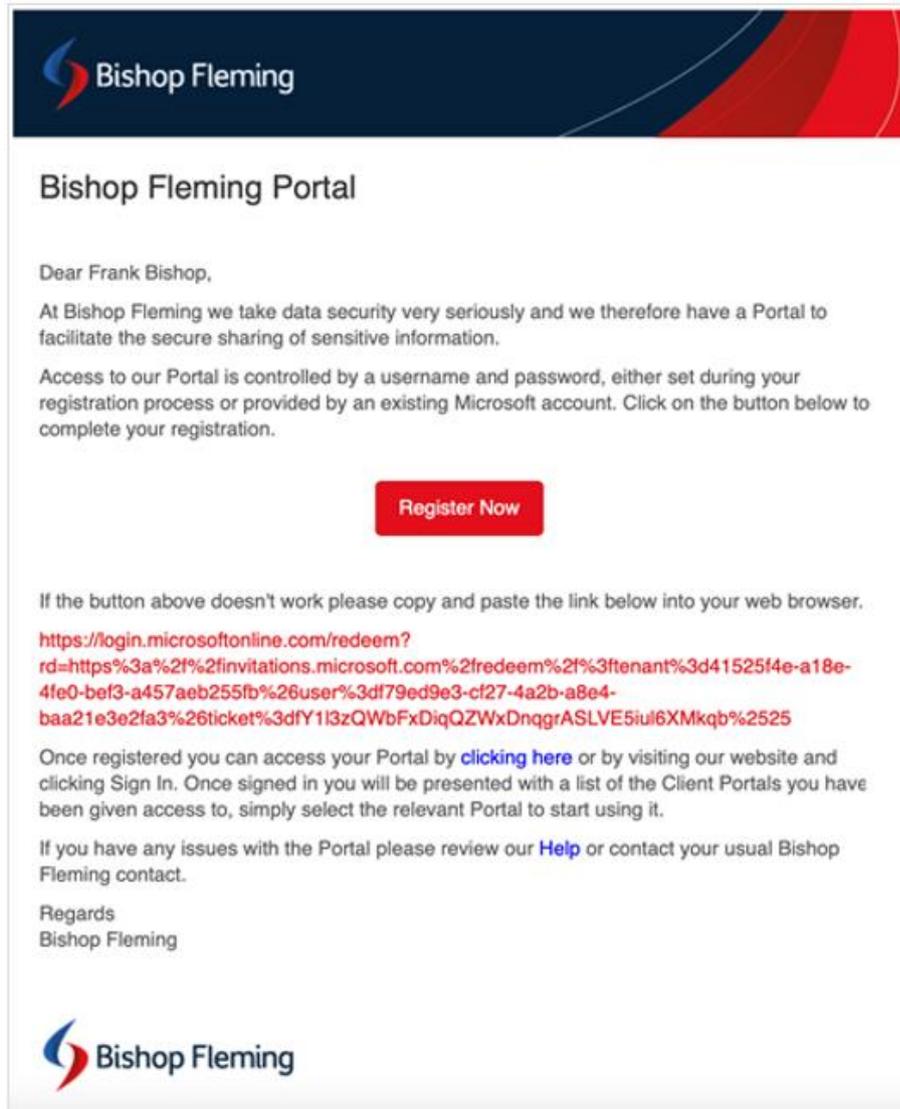
The following is a step-by-step user guide and explains in detail how the client portal works.

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**

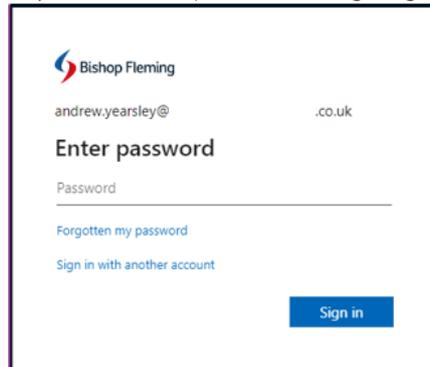


Depending on whether you already have a Microsoft account or not, this will affect the next steps.

- 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.

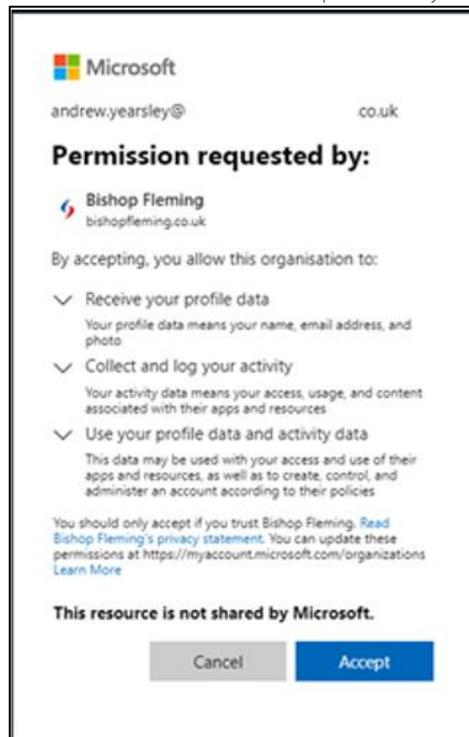
Existing Microsoft Account

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.



The image shows a Microsoft sign-in page for Bishop Fleming. At the top left is the Bishop Fleming logo. Below it, the email address 'andrew.yearsley@' is partially visible, followed by '.co.uk'. The main heading is 'Enter password'. There is a password input field with a horizontal line below it. Below the password field are two links: 'Forgotten my password' and 'Sign in with another account'. At the bottom right is a blue 'Sign in' button.

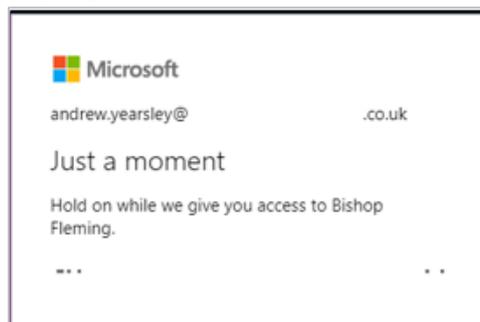
You will then see the following notification: Permission requested by Bishop Fleming.



The image shows a Microsoft permission request dialog. At the top left is the Microsoft logo. Below it, the email address 'andrew.yearsley@' is partially visible, followed by '.co.uk'. The main heading is 'Permission requested by:'. Below this is the Bishop Fleming logo and 'bishopfleming.co.uk'. The text reads: 'By accepting, you allow this organisation to:'. There are three items with checkmarks: '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 this 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 has 'Cancel' and 'Accept' buttons.

1. Select **Accept**

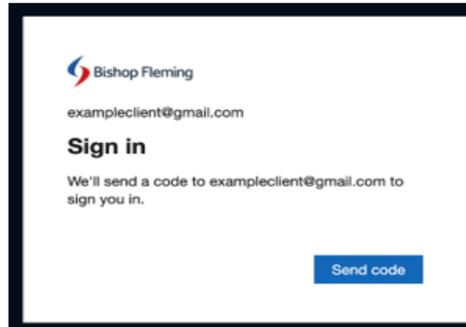
You will briefly see the following message and then be presented with the client portal landing page, refer to the section: [Portal Landing Page](#).



The image shows a Microsoft 'Just a moment' message. At the top left is the Microsoft logo. Below it, the email address 'andrew.yearsley@' is partially visible, followed by '.co.uk'. The main heading is 'Just a moment'. Below this is the text: 'Hold on while we give you access to Bishop Fleming.' At the bottom, there are three dots on the left and two dots on the right, indicating a loading state.

Non-Microsoft Account

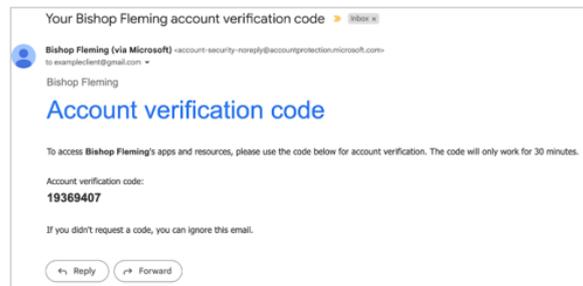
If you do not have a Microsoft Account, you will be prompted with the following Sign in screen each time you access the client portal.



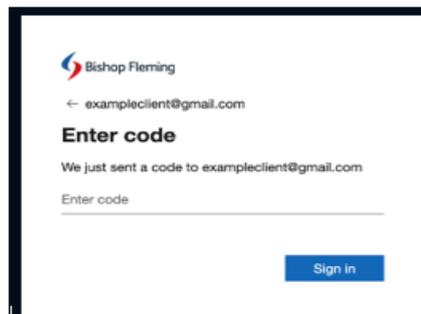
1. Select **Send Code**

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

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

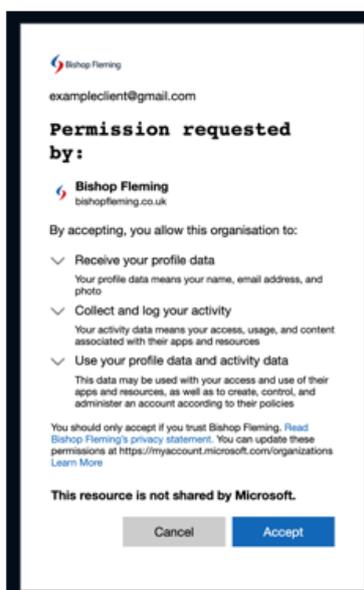


3. Go back to your web browser to enter the code by selecting, **Sign in** on the following screen.



The following notification appears, Permission requested by Bishop Fleming.

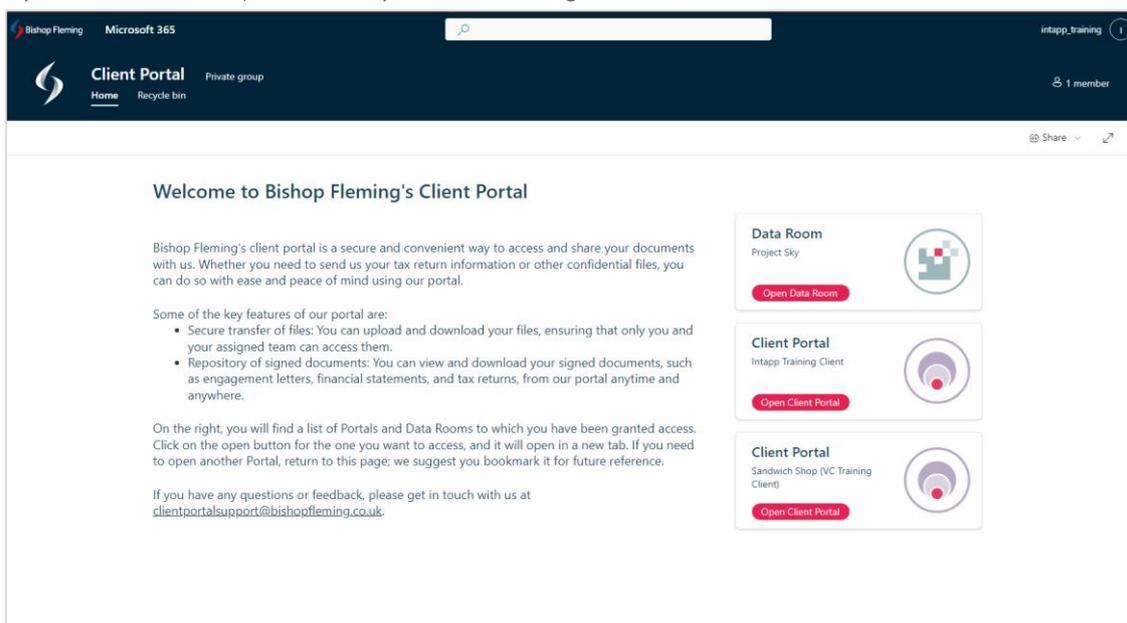
1. Select **Accept**



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.

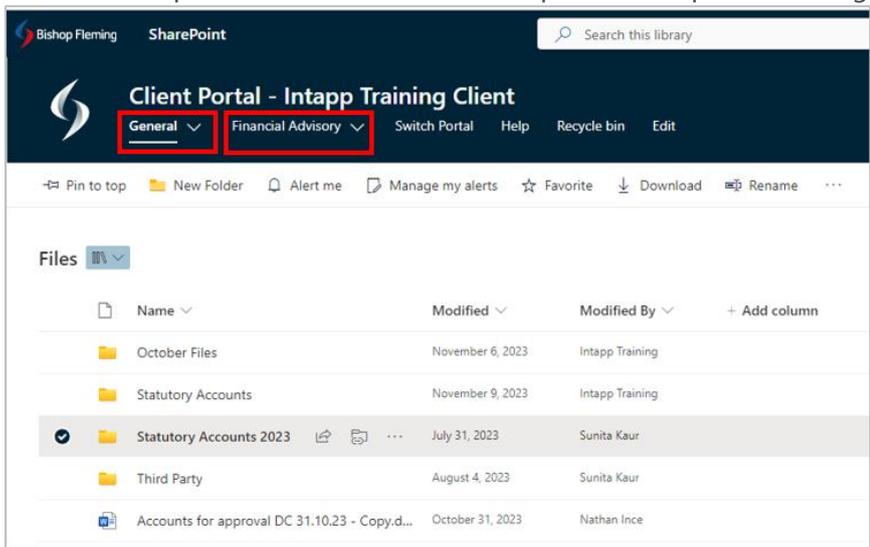
Files

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**

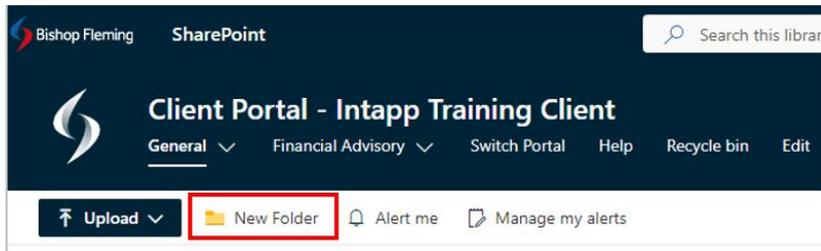


3. Either select Files or Signed Documents.

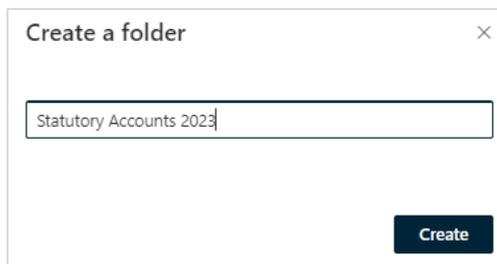


Create a Folder

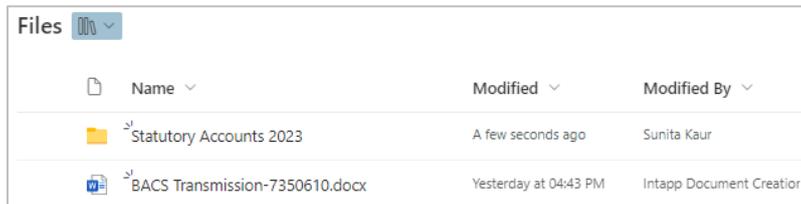
1. Select the **Files Tab**
2. Select New **Folder**



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



4. Select Create



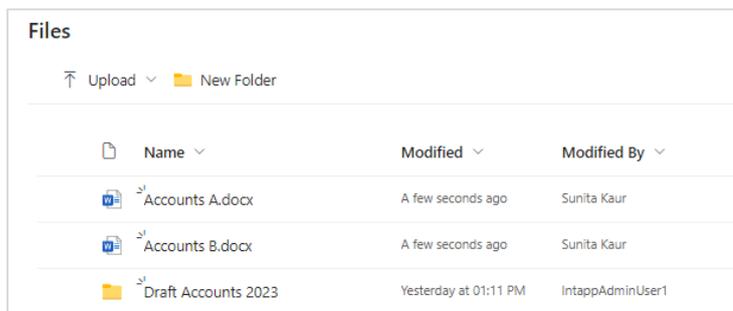
Name	Modified	Modified By
Statutory Accounts 2023	A few seconds ago	Sunita Kaur
BACS Transmission-7350610.docx	Yesterday at 04:43 PM	Intapp Document Creator

Upload Files

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

1. To upload files to the portal, select 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.



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

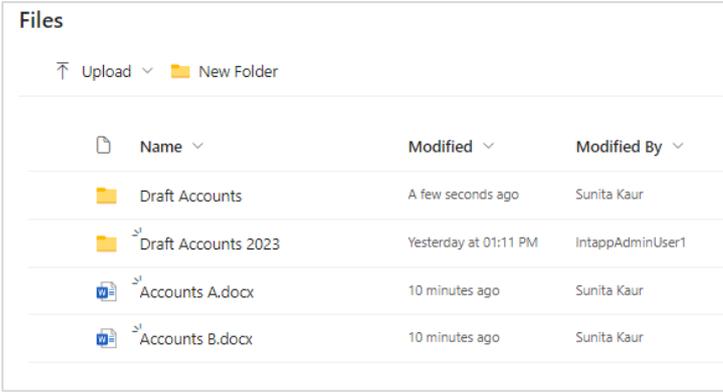
Upload Folders

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.



The screenshot shows a 'Files' interface with a navigation bar at the top containing an 'Upload' button and a 'New Folder' button. Below the navigation bar is a table with three columns: 'Name', 'Modified', and 'Modified By'. The table contains the following entries:

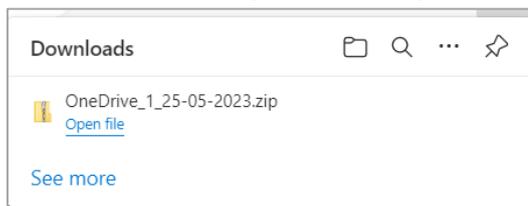
Name	Modified	Modified By
Draft Accounts	A few seconds ago	Sunita Kaur
Draft Accounts 2023	Yesterday at 01:11 PM	IntappAdminUser1
Accounts A.docx	10 minutes ago	Sunita Kaur
Accounts B.docx	10 minutes ago	Sunita Kaur

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



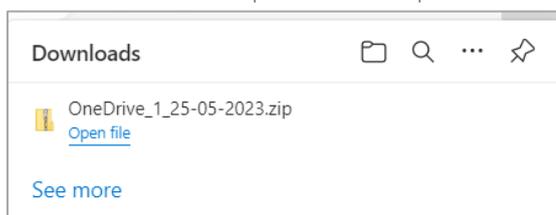
3. Select **Open File**, the files have appeared in File Explorer in the Downloads area.

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

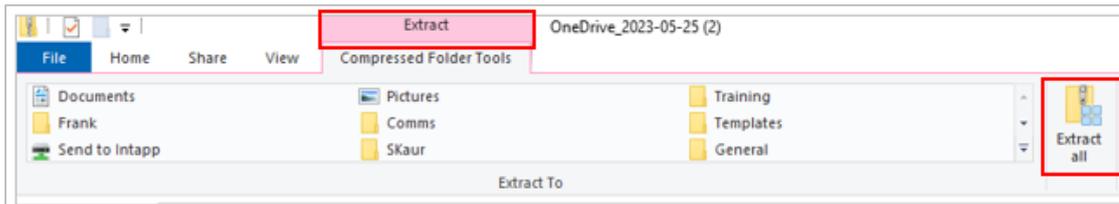


3. Select **Open File**

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.

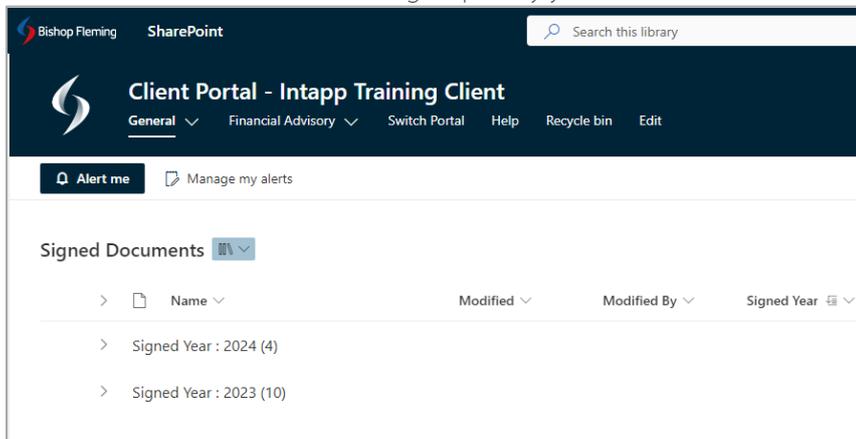


6. Select **Extract All** (if required, you can browse to select another location to extract to)
7. Select **Extract**

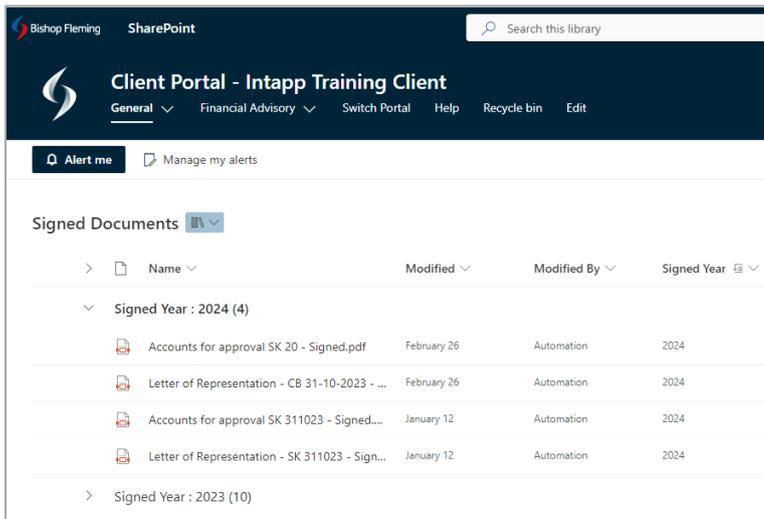
Double click the folder to see all the files within the folder.

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.



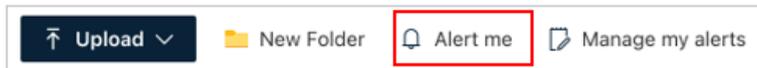
1. Expand the signed year to see a list of the documents by selecting the arrow next to the year.



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.

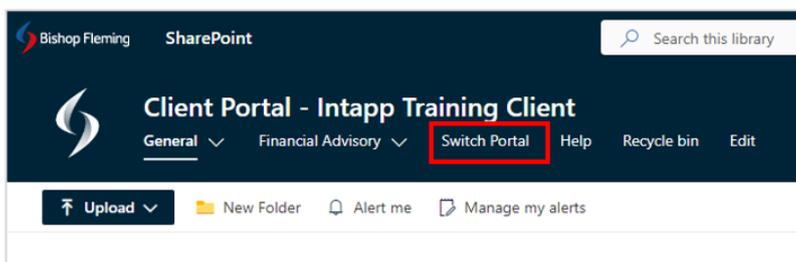
Manage My Alerts

In this section you can manage alerts by adding new alerts or 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 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 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.

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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