

Wright Vigar WRIGHT VIGAR CHARTERED ACCOUNTANTS

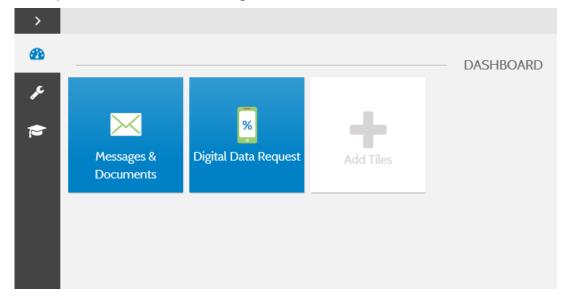
1. OneClick Activation

To enable you to use both the Messages & Documents functionality within CCH OneClick, you will need to have an activated OneClick account.

If you haven't already activated your workspace, you should have received an activation email sent by a Wright Vigar team member from <u>notifications@clientspace.co.uk</u>

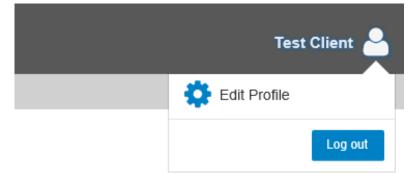
- Click the link in the email and enter your activation ID (we will have either informed you of this, or you will have received a text message when your account was activated)
- Create a new password
- Select 2 security questions
- Log into the client workspace using your email address and new password

Your workspace will show the Messages & Documents tile.



1.1 Edit your profile

- Once activated, within your client workspace you can add an optional photo to your profile by selecting Edit Profile and browsing for an image to upload
- This picture will be visible to Wright Vigar

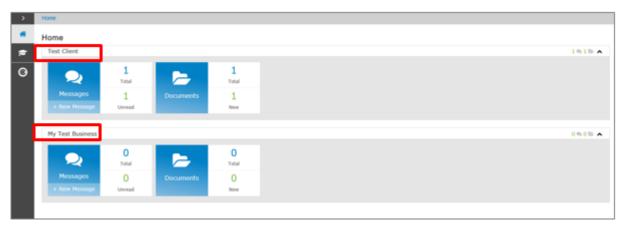


2. Messages & Documents

- Messages & Documents is the functionality within OneClick that allows you to exchange messages, files and information online (previously known as Client Portal)
- It is accessed through your client workspace within OneClick

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8				DASHBOARD		
۶		1		-		
1	\succ	Unread message	×	(1.1) (0.2)	- -	
	Messages & Documents	1 New document	Digital Data Request	Payescape	Add Tiles	
	Documents	New occument				

- From the home page you can see a summary of each account you have access to
- If you are an associated contact of multiple businesses you will be able to see them all here



2.1 Messages

- The Messages tile will take you to the conversations for that account
- There is also an indicator here of how many messages you have and how many are unread
- · You will be sent an email notification when you receive a new message

lome				
Home				
Test Client				
Test client				
	1		1	
\sim	Total		Total	
Messages	1	Documents	1	
+ New Message	Unread		New	
+ New Message	Unread		New	
+ New Message My Test Business	Unread		New	
		_		
My Test Business	0		0	
My Test Business	0 Total	5	0 Total	
My Test Business	0	Documents	0	

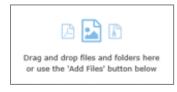
• Select the + button to create and send a new message

>	Test Client > Messages		
*	Messages		
-		1 Message	
4 10	Tax return 2016/2017 Jess Lindo	0 replies, 1 attachment	29 August 2017 11:40
Ø			
			0

• The To, Subject and Message fields are mandatory and must be completed before the message can be sent

New Message				
		Jeen Text OrwClick Text +		
	• Subject • Hessape	This is a test message Test		
			Add Film Cancel Send	I

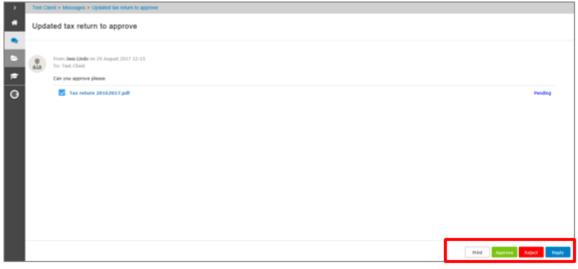
Select the 'Add Files' button or use the drag and drop facility to upload documents to the message (Please note:- The Drag and drop area is not available when using a mobile device).



The exclamation mark signals that there is a document within this conversation needing your approval

>	Test Client > Messages			
*	Messages			
		2 Messages		
6 10	Updated tax return to approve	0 replies, 1 attachment	29 August 2017 12:15	11
0	Tax return 2016/2017	0 replies, 1 attachment	29 August 2017 11:40	
				•

• Select here which option you'd like to choose



- If approving the document, enter your OneClick password
- You may have to view the document first before it can be approved

>	Test Client > Messages > Updated tax return to approve	
ŵ	Approve Documents	
2	Tax return 20162017.pdf	
-		
8	To approve please enter your password:]
G		Cancel Approve

• Use the home button to return to your list of available accounts

>	Test C	Sent > Messages > Updated tax return to approve	
*	Upd	ated tax return to approve	
~	-		
5		From:Dess Lindo on 29 August 2017 12:15 To: Test Client	
\$	_	Can you approve please	
Ø		Tax return 20162017.pdf	Approved
			Print Reply
	-		

2.2 Documents

- The documents tile will take you to all the documents available for that particular account
- Select the new folder to view all the latest documents that have been received and not yet reviewed

>	Home				
	Home				
1	Test Client				1015
Ø	Q Messages + New Message	1 Tetal 1 Unread	Documents	1 _{Total} 1 _{New}	
	My Test Business				0 = 0 =
	2	0 Total	-	0 Total	
	Messages + New Message	0 Unread	Documents	0 New	

 Documents will be split out into folders (as specified by your specified Wright Vigar team member)



- > # Home Test Client 1 1 🖘 1 🗁 1 🖾 🔺 1 Total Ø 1 1 2 Total 1 1 Document to approve Unread New My Test Business 0 = 0 = • 0 Total 0 Total 2 \sim 0 0 Unread New
- Any documents needing your approval will be shown here

- Tick the checkbox and select Approve or Reject
- You will need to enter your password to confirm your decision

>	Test Client > Documents to approve	
:	Documents to approve	
•	Tax return 20162017.pdf Jess Lindo, 29 August 2017 12:15	Pending
*		
Θ		
		Approve Reject

• Click here to return to your OneClick Workspace

Test Client	>	Home					
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Total Total Messages 3 Documents Y New Document to approve	1	Test Client		_			
Image: New Message O O My Test Business 0 0 Total 0 Total Messages 0 Documents	Ø	2				1	
My Test Business O O Total O Messages O Documents O				Documents		Document to approve	
0 0 Total Total Messages 0 Documents 0		+ New Message	Unread		New		
Total Total Messages O Documents		My Test Business					
Messages 0 Documents 0							
+ New Message Unread New							
		+ New Message	Unread		New		