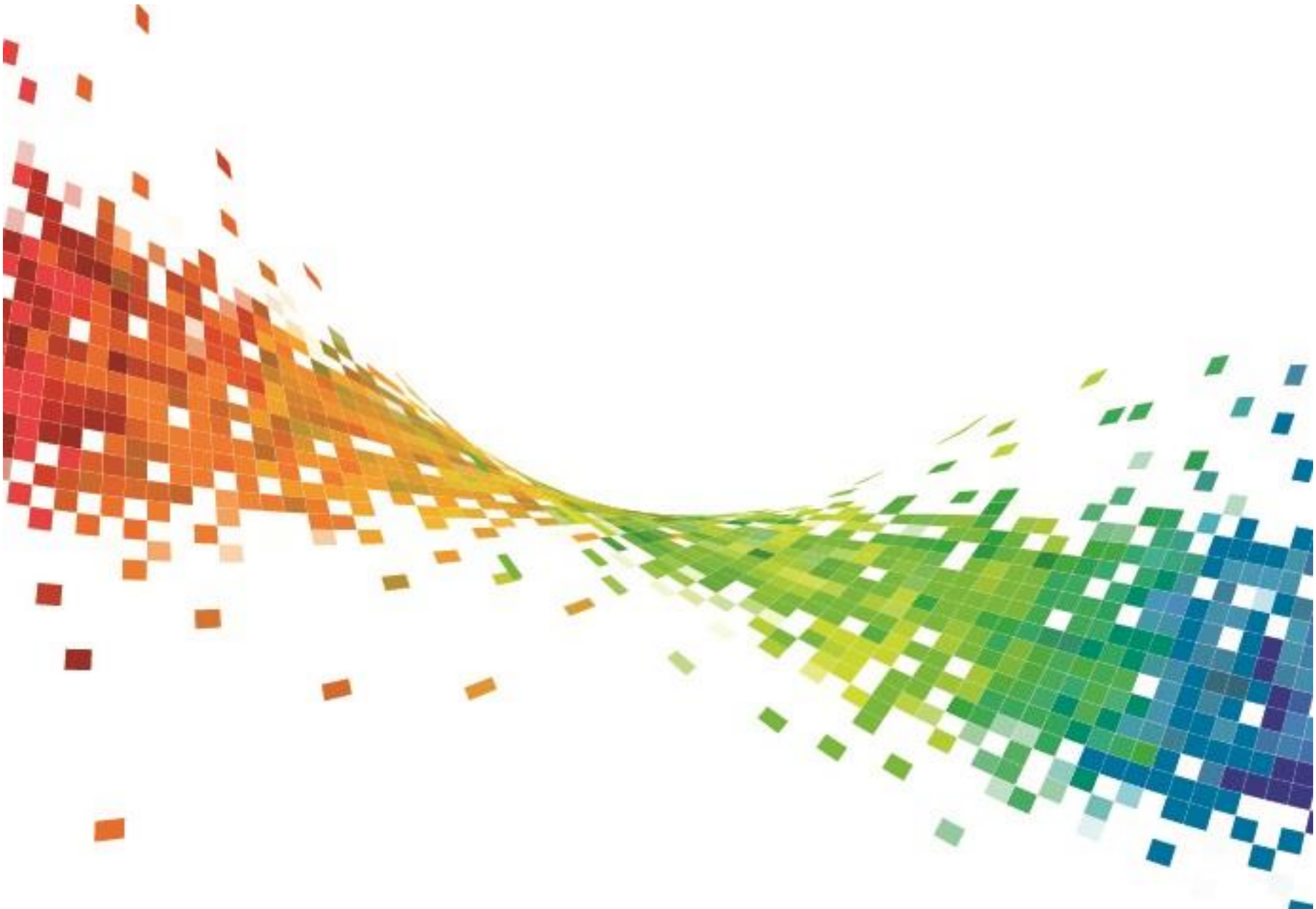
Client Guide OneClick



Wright Vigar

WRIGHT VIGAR
CHARTERED ACCOUNTANTS

www.wrightvigar.co.uk

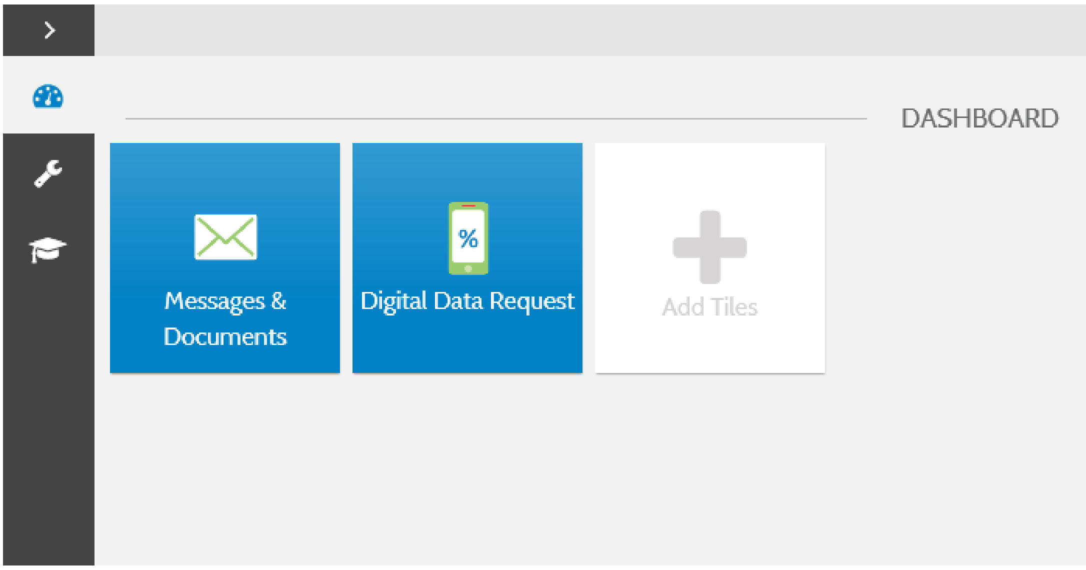
1. OneClick Activation

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 notifications@clientspace.co.uk

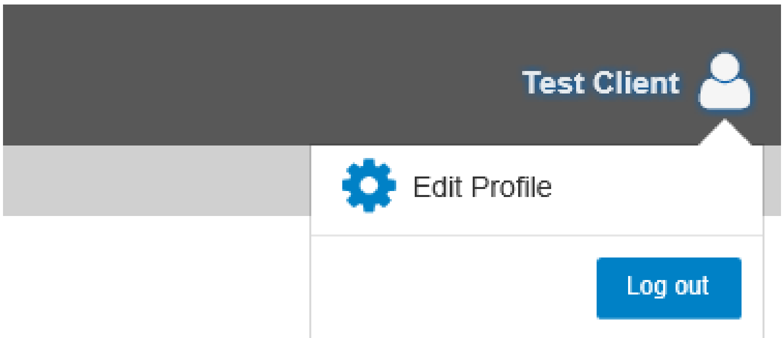
- Click the link in the email and enter your activation ID (we will have either informed you of this, or you will have received a text message when your account was activated)
- Create a new password
- Select 2 security questions
- Log into the client workspace using your email address and new password

Your workspace will show the Messages & Documents tile.



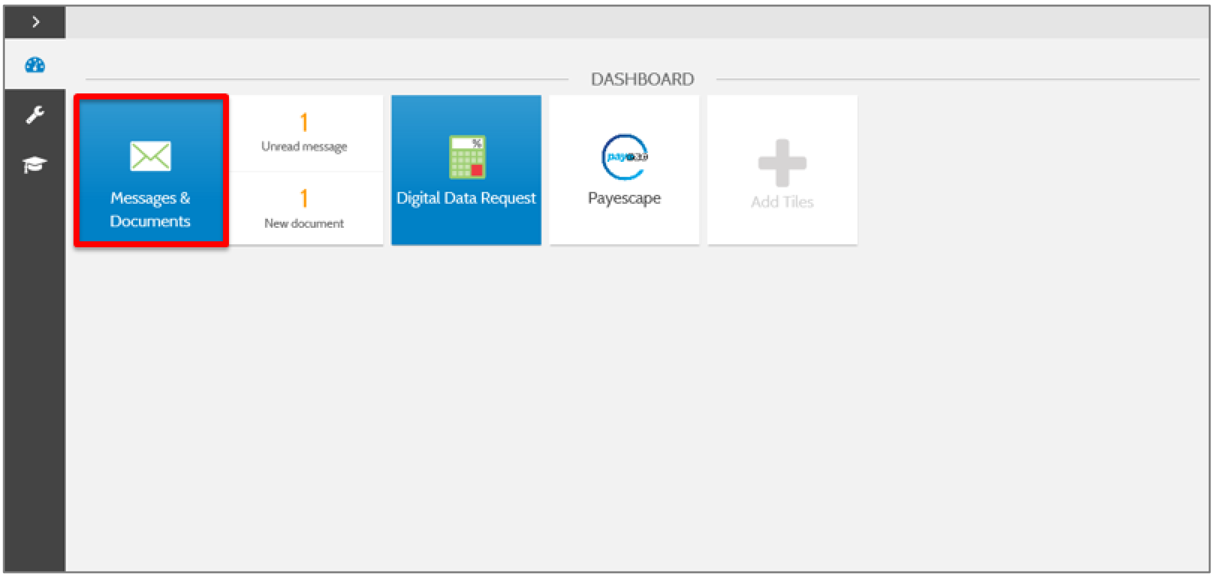
1.1 Edit your profile

- 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

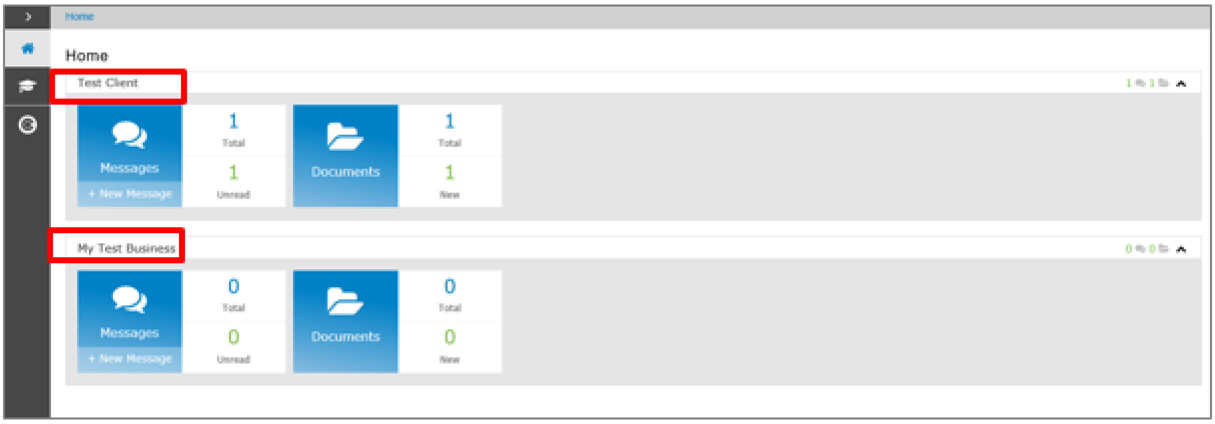


2. Messages & Documents

- 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

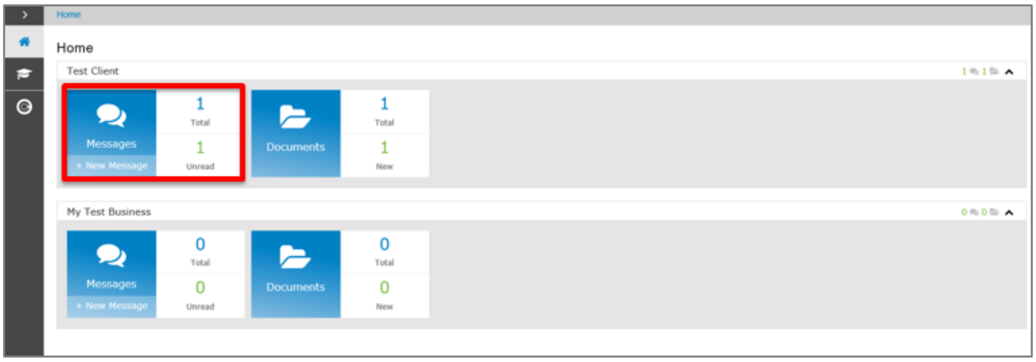


- From the home page you can see a summary of each account you have access to
- If you are an associated contact of multiple businesses you will be able to see them all here

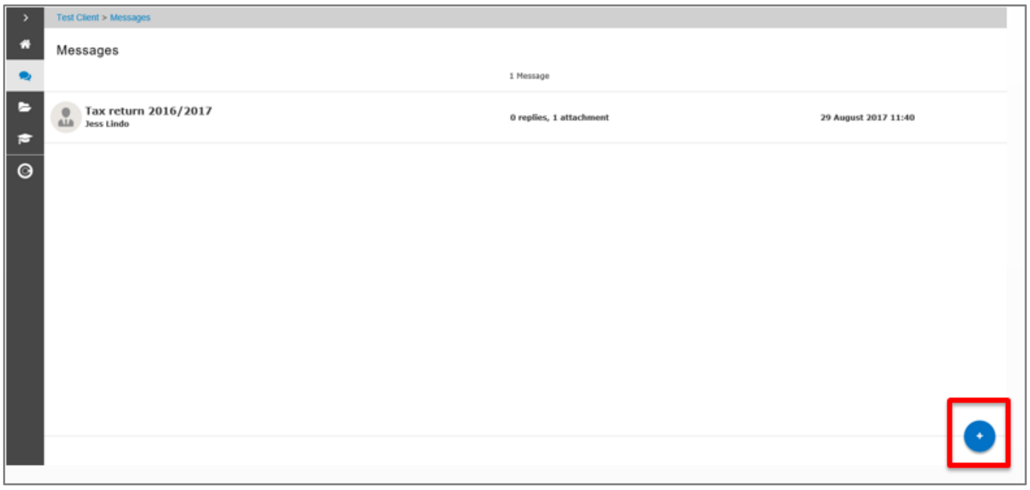


2.1 Messages

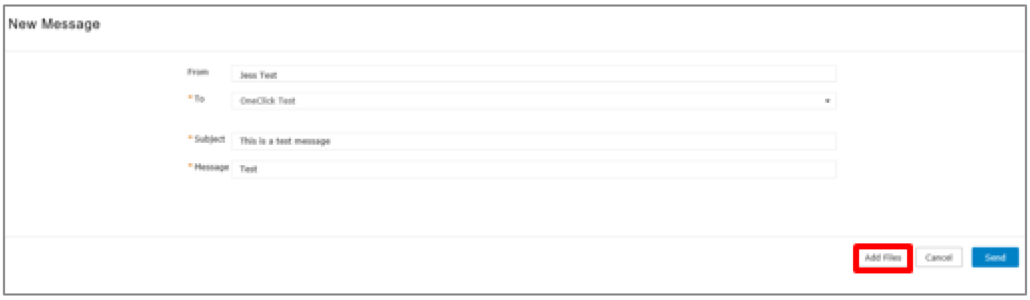
- The Messages tile will take you to the conversations for that account
- There is also an indicator here of how many messages you have and how many are unread
- You will be sent an email notification when you receive a new message



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



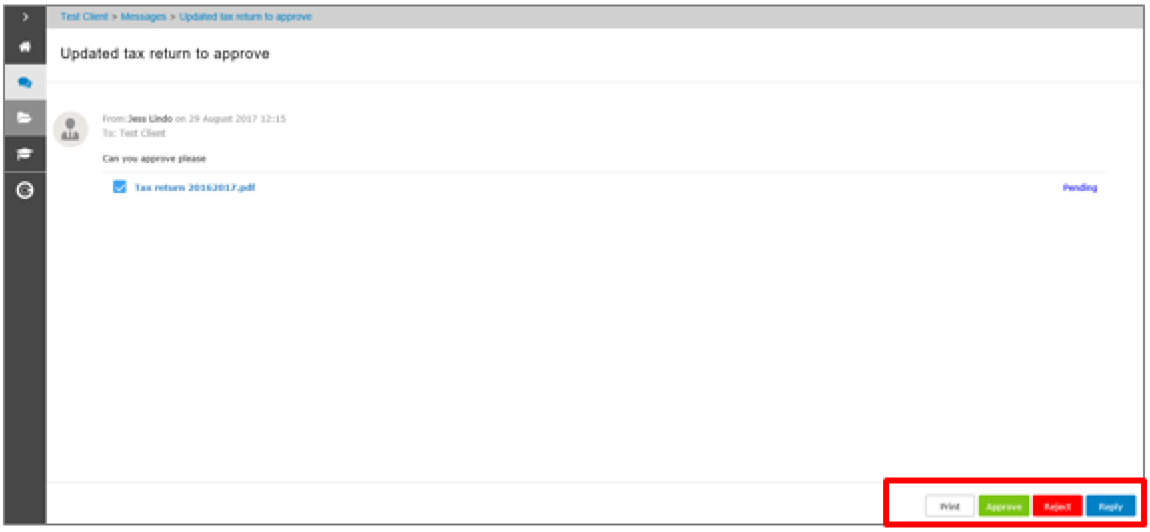
- The To, Subject and Message fields are mandatory and must be completed before the message can be sent



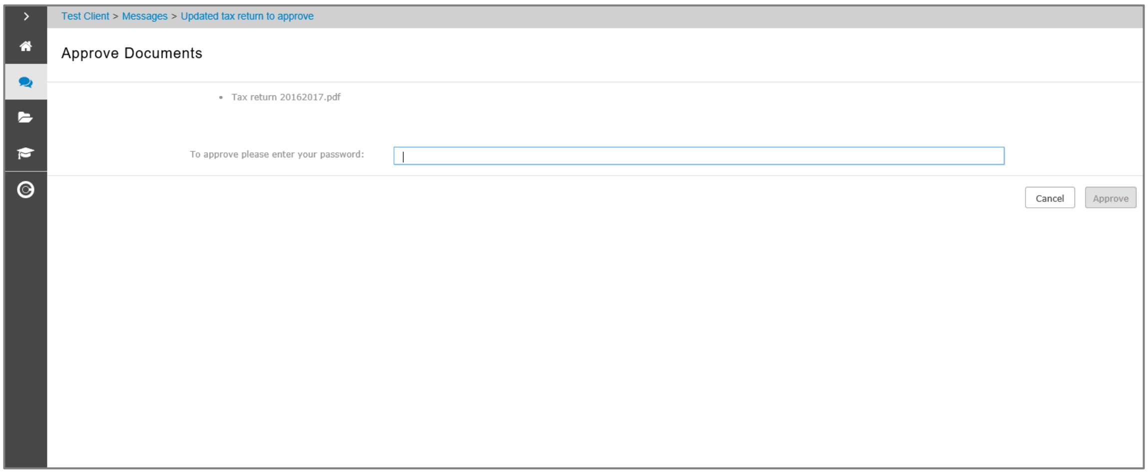
Select the 'Add Files' button or use the drag and drop facility to upload documents to the message **(Please note:- The Drag and drop area is not available when using a mobile device).**

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

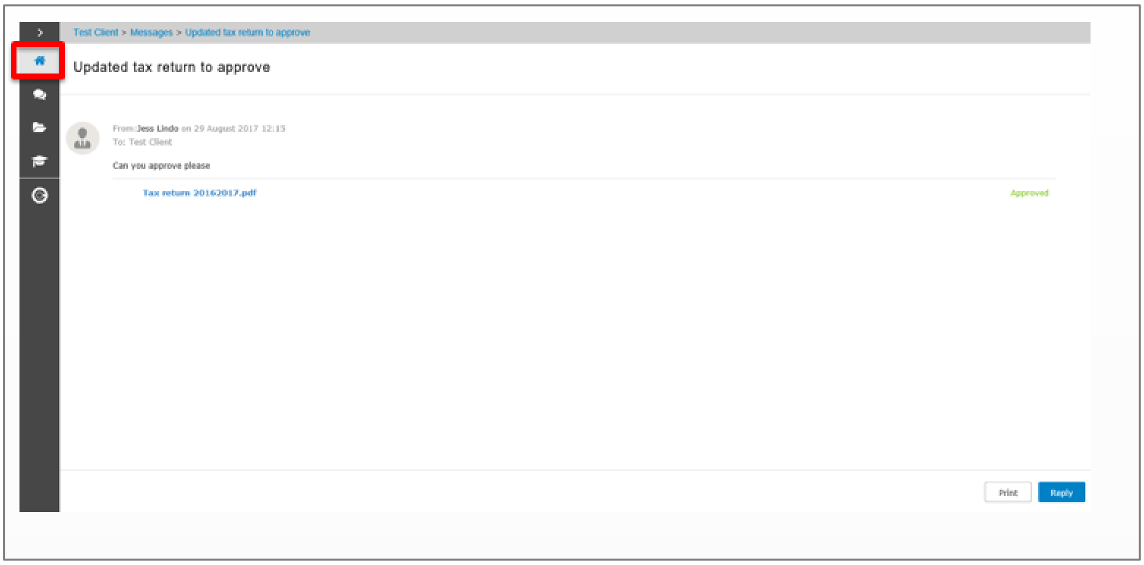
- Select here which option you'd like to choose



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

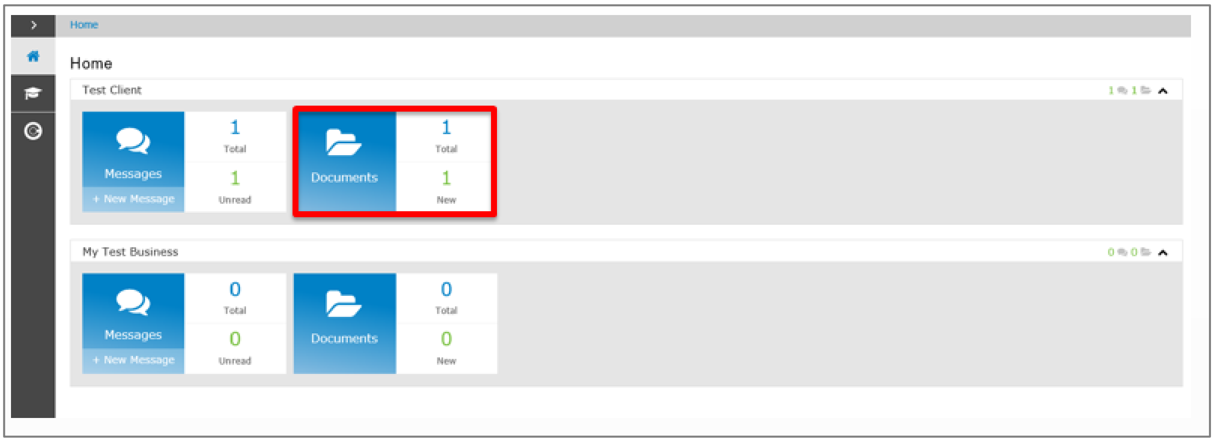


- Use the home button to return to your list of available accounts

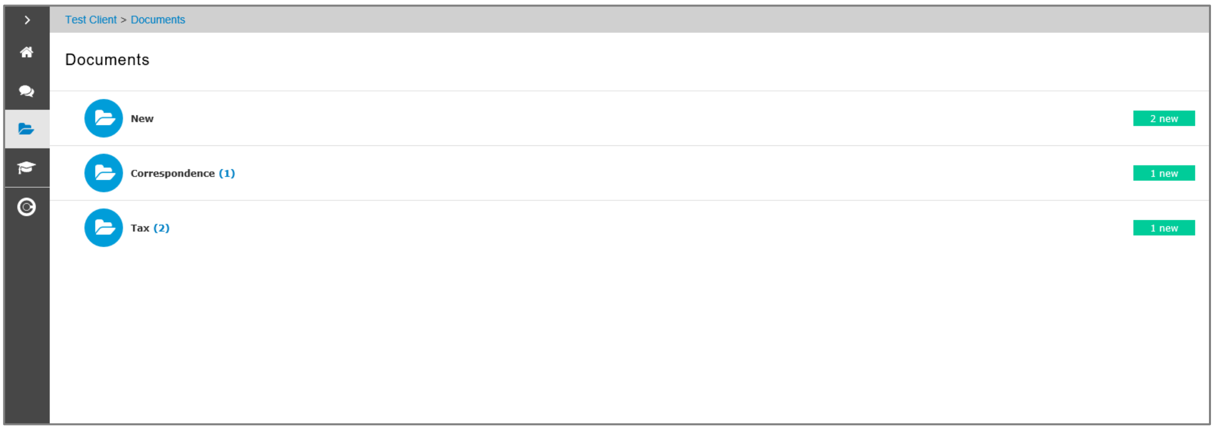


2.2 Documents

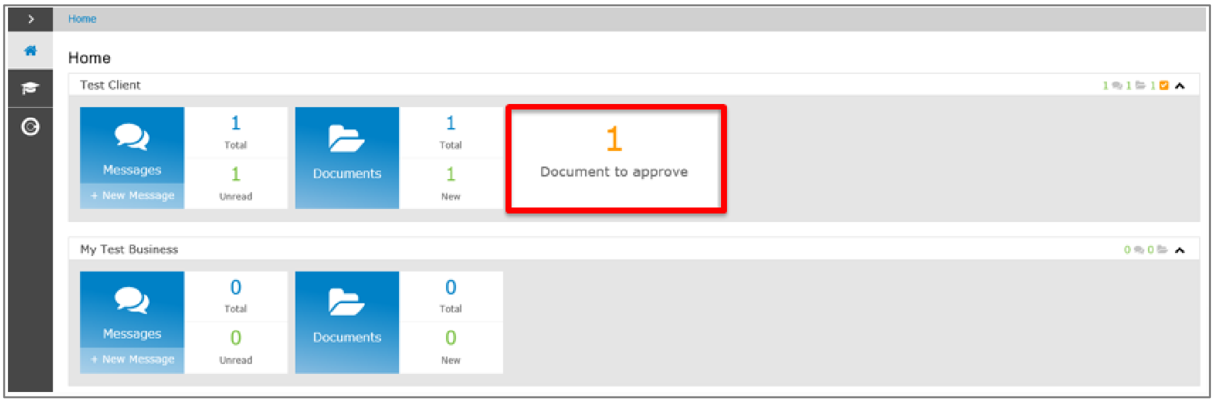
- The documents tile will take you to all the documents available for that particular account
- Select the new folder to view all the latest documents that have been received and not yet reviewed



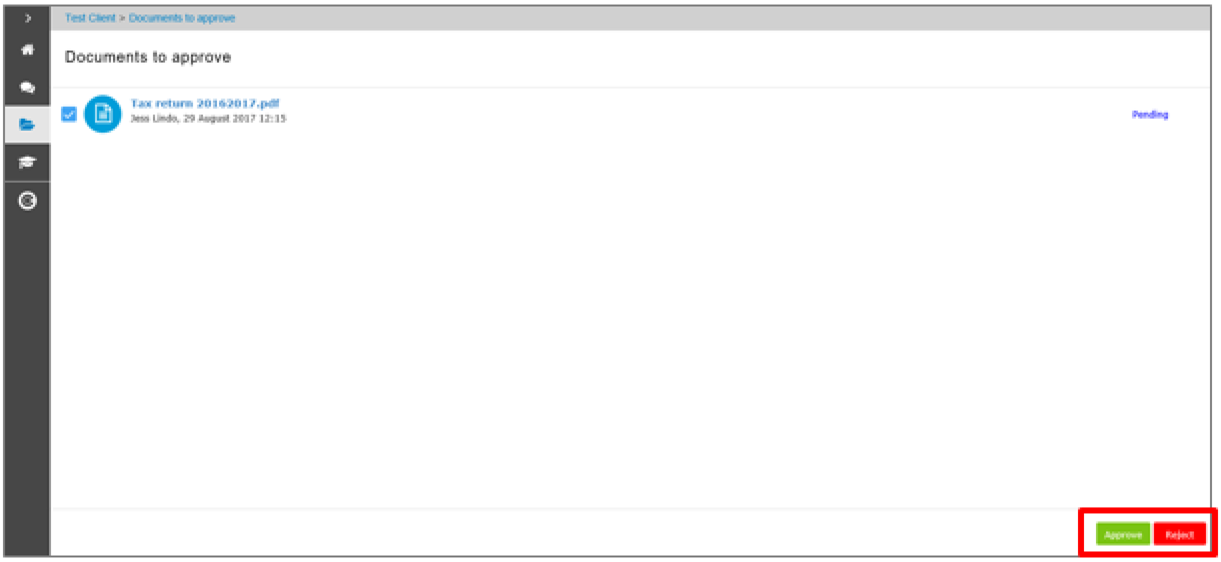
- Documents will be split out into folders (as specified by your specified Wright Vigar team member)



- 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



- Click here to return to your OneClick Workspace