

## **BWM Client Portal - FAQ**

### **What is a Client Portal?**

A client portal is a secure encrypted area on the internet (sometimes referred to as being “in the Cloud”) where you can work with us more closely and efficiently. It includes an area for you to upload files to us, and for us to send you files and documents. Unlike many other similar facilities, however, there is personalised messaging built in too, enabling us to communicate about those documents and files in context.

Where there are documents needing your approval, we can use the Client Portal to upload the documents for you to review and approve those documents electronically, wherever you are in the world, cutting postage costs for both of us and improving efficiency and turnaround times.

### **How can I be sure my data is safe?**

The portal and its security is provided and maintained by CCH Software who are part of Wolters Kluwer, a market leading global information services company. Your data will be encrypted using the 256-bit Advanced Encryption Standard which is the highest available military grade encryption. Asymmetric key encryption will be undertaken using two separate encryption keys held in separate locations to maximise security.

Over this is then laid the independent Secure Sockets Layer (“SSL”) certification provided by Symantec which you may be familiar with from interaction with internet banking and other secure websites. SSL certification will also provide you with visible reassurance by way of the closed padlock and https web site address reassuring you that the website is secure and trusted. CCH software conduct rigorous penetration testing to probe for vulnerabilities.

### **What about secure login?**

When we first enable your client portal, you will receive an email from [notifications@clientspace.co.uk](mailto:notifications@clientspace.co.uk) inviting you to activate your client portal. Please do not reply to this email address as it is not monitored. Instead, please click the activation link within the email, and this will take you to an activation page for your portal.

We will have provided you with an activation ID code by letter for you to enter as authentication, after which you will be able to set your own password. While we have set the minimum security requirements in terms of length and complexity of passwords, you can make yours as complex as you deem appropriate. No record of your password will be held by us for security reasons.

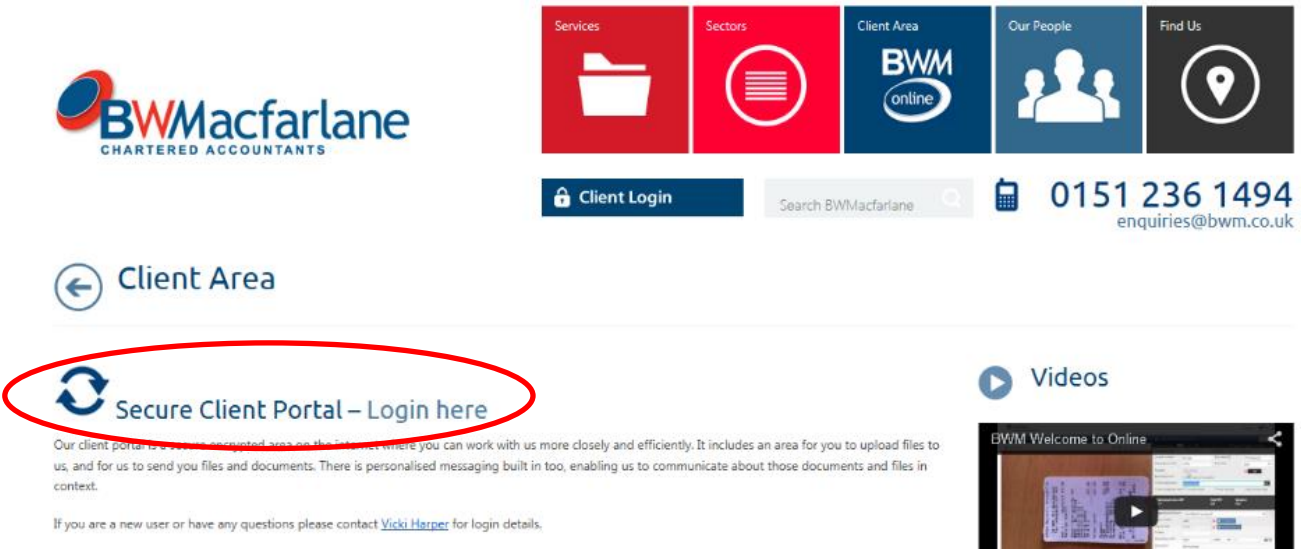
### **What if I forget my password?**

If you forget your password you will be able to request that it is reset – the activation ID code mentioned above will be needed again in such a case. There is a self-service ‘Forgot your password’ function at <https://clients.bwm.co.uk>. As with all passwords, do not tell anyone or write it down, to protect the security of your portal.



## How can I access my client portal once it is activated?

You can access a client portal using any browser at <https://clients.bwm.co.uk>. There is also a login link from our homepage at [www.bwm.co.uk](http://www.bwm.co.uk) or you can click the link in any emails you have received that have been generated by the portal.



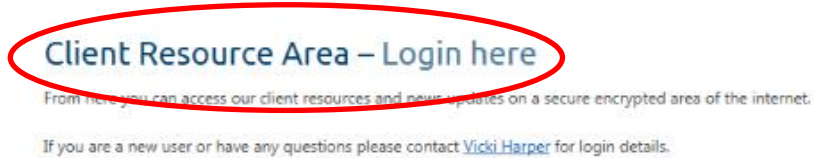
The screenshot shows the BWMacfarlane homepage. At the top left is the logo. To the right is a navigation menu with five items: Services (folder icon), Sectors (list icon), Client Area (BWM online logo), Our People (group of people icon), and Find Us (location pin icon). Below the menu is a 'Client Login' button, a search bar, and a phone number '0151 236 1494' with the email 'enquiries@bwm.co.uk'. Below the navigation is a 'Client Area' section with a back arrow icon. A red circle highlights a link that says 'Secure Client Portal – Login here' with a refresh icon. Below this link is a paragraph of text and a 'Videos' section with a play button icon and a video thumbnail titled 'BWM Welcome to Online'.

## How much can I store in my client portal?

Each client portal currently comes with almost 1GB of available space for documents and messages. In time this will mean that you or we may need to remove documents to free up space; although if there is a need for further storage space this can be arranged.

### What is the BWM Client Resource Area?

Our client resource area is **held separately from the portal** on another secure encrypted area of the internet. Within the client resource area (accessible via [www.bwm.co.uk/client-area/](http://www.bwm.co.uk/client-area/) you can access our client resources and news updates, including useful guidance notes and slides from previous seminars etc. If you would like to be set up (this is separate to your portal set up) or have forgotten your password please contact Vicki Harper at [vicki.h@bwm.co.uk](mailto:vicki.h@bwm.co.uk) in the BWMacfarlane marketing team.



The screenshot shows the 'Client Resource Area – Login here' page. A red circle highlights the link text. Below the link is a paragraph of text and a 'Videos' section with a play button icon and a video thumbnail titled 'BWM Welcome to Online'.

