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. To use our Client Portal you only need a browser, an email account and an internet connection.

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 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 – 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. The activation ID code mentioned above will be needed again in such a case.

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 or you can click the link in any emails you have received that have been generated by the portal.
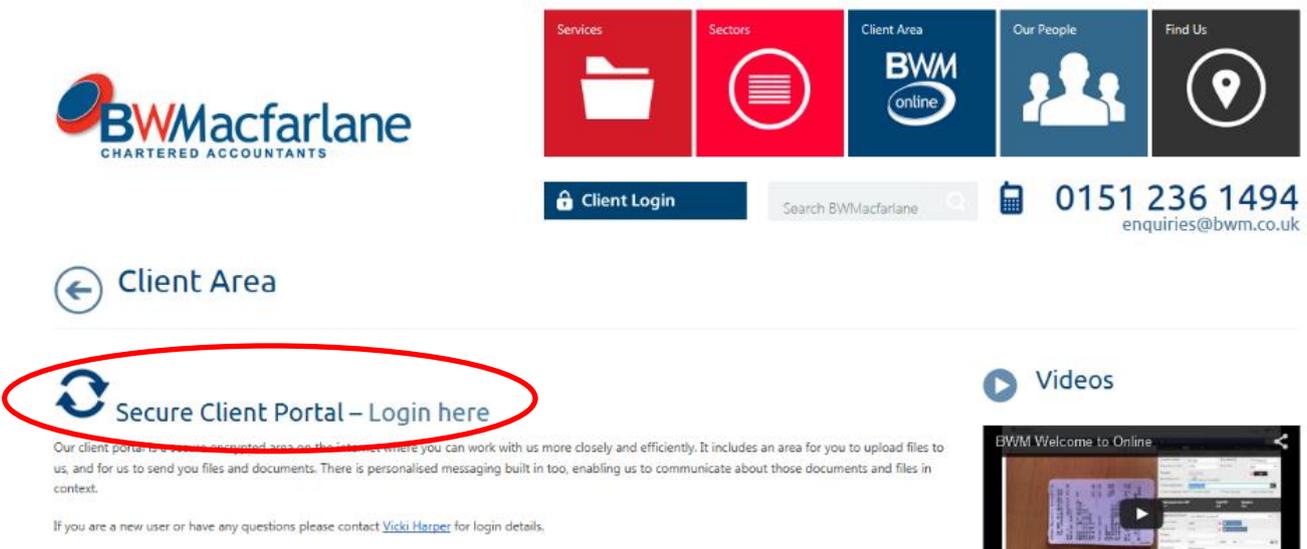
How much can I store in my client portal?

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/ 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 in the BWMacfarlane marketing team.
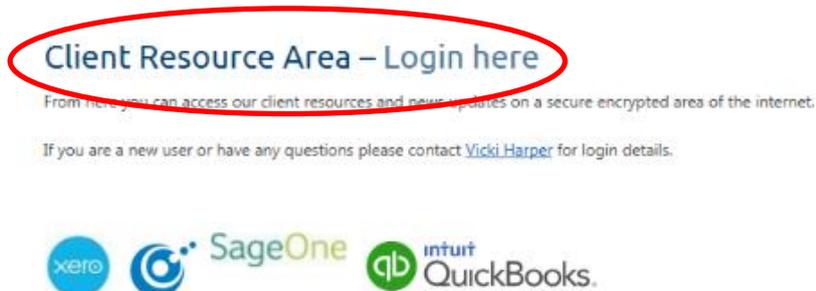
How do I add a file to a portal message?

In order to activate the 'add file' button shown below you firstly need to enter a subject title into the subject field and a message into the message field. You will then be able to click on the 'add file' button and browse your computer for the file you wish to attach.
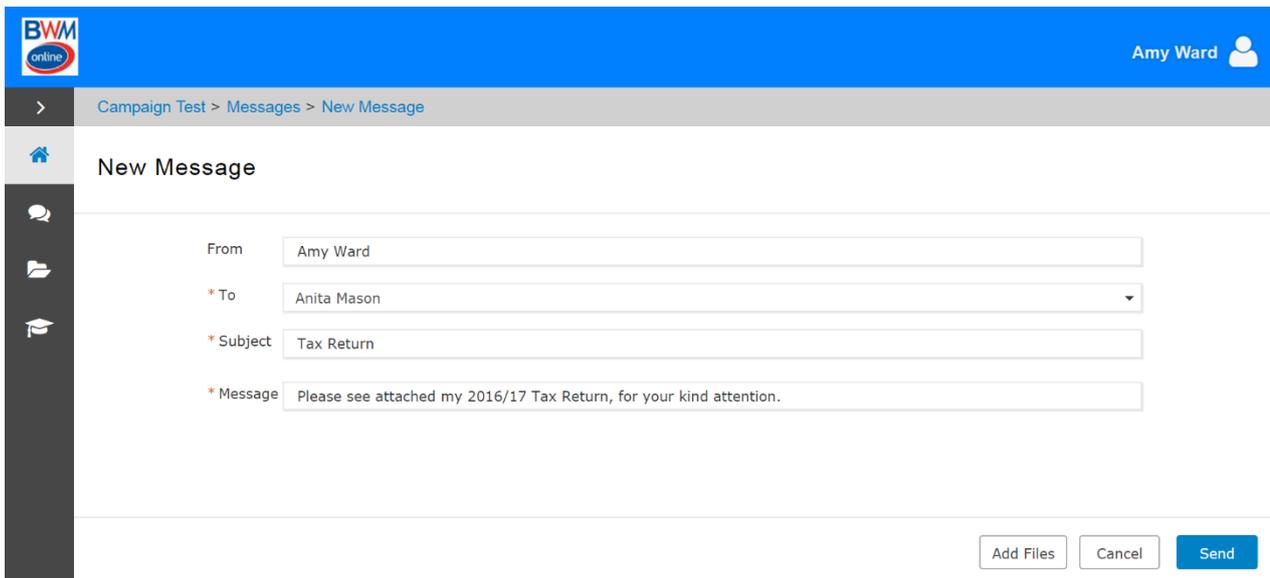
Sending of large files

Large files can take some time to upload, particularly if your internet service is slow. In order to make the process as efficient as possible there is an option for messages to be automatically sent when the upload has completed as described below.

Using the background send function

Once you have created a new message and selected the files you wish to upload there is the option to press 'Send' whilst the upload is still in progress, enabling the message to be automatically sent once all the files reach 100%. This allows you to leave the upload in progress but attend to other matters elsewhere without a risk the session might time out.

Once the background sending function has been initiated, the To, CC, Subject and Message fields are inactive. To make changes to these, you would need to click Cancel to discard the whole message. If you want to remove a file or files before the message has been sent you can click on the respective files' recycle bin icons to remove them. The message will then be sent once any remaining uploads are completed. Note – If you are uploading only one file in a message and click the delete file icon while the background send function has been initiated, the background send function will be cancelled. If you close your browser in the middle of an upload that is incomplete, the message and file upload will be discarded.