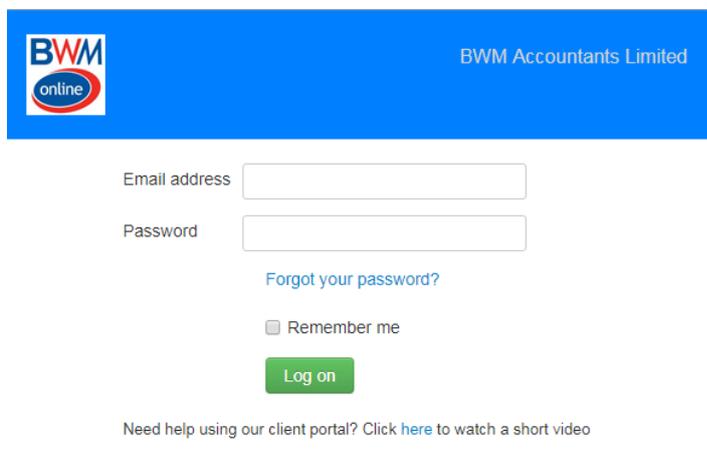


BWM Client Portal

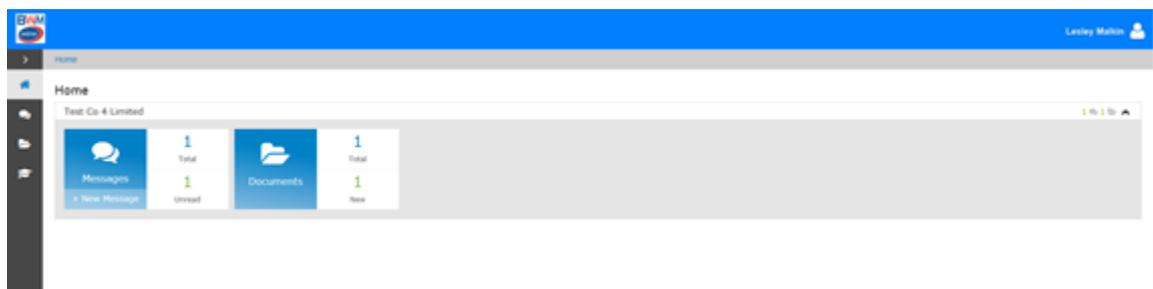
Our portal address is: <https://bwm.clientspace.co.uk>

Here is a screenshot of the log in screen you will see at the above address:



The screenshot shows the login interface for the BWM Client Portal. At the top left is the BWM online logo, and at the top right is the text 'BWM Accountants Limited'. Below this, there are two input fields: 'Email address' and 'Password'. A link for 'Forgot your password?' is positioned below the password field. A 'Remember me' checkbox is located below the 'Forgot your password?' link. A green 'Log on' button is centered below the checkbox. At the bottom of the form, there is a link: 'Need help using our client portal? Click [here](#) to watch a short video'.

Here is an example of how your portal will look on screen once activated:



The portal is straight-forward to use and there are answers to frequently asked questions on the following pages, useful tutorial videos you can access through the portal too if needed or you can call your usual BWM contact for assistance.

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.

The benefits of using our client portal:

- **Totally secure** – For maximum security, all your messages and data will be encrypted using the highest available military grade encryption and secured using trusted SSL certification. Only you will know the password that you select for your logon.
- **Two way transfer** – The new portal allows both us and you to post and read messages and to upload and download files.
- **Single logon** – Even if we advise you in a number of different capacities – for example, as a director of several companies and as a personal taxpayer – you only need a single logon to access all your files and messages on the client portal.
- **Approval** – The portal makes electronic document approval simple: Review the document, tick a box and enter your personal password to approve it, ready for us to submit to the relevant authorities.
- **Team responsibilities** – Whenever you send a message or a file to us, just use the drop-down list in the portal to select the person at BWM you have been working with. That way, you can be sure it will reach the right person.

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 (It is a good idea to add this email address to your safe senders list to ensure these emails do not go to Spam). 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.

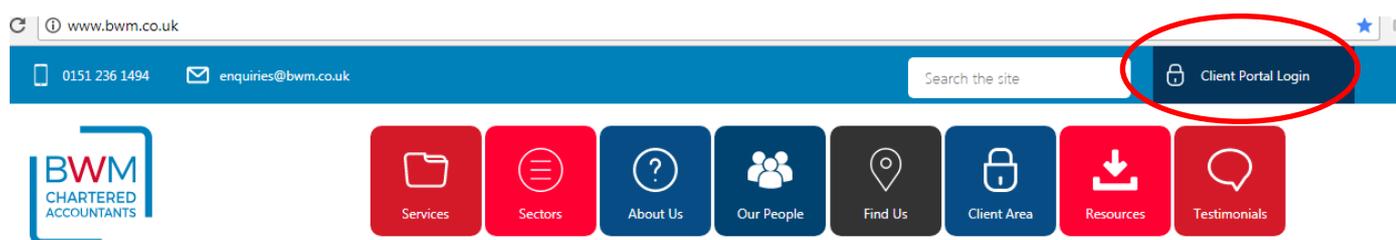
We will have provided you with an activation ID code by letter for you to enter as authentication, after which you will be able to set your own password. While we have set the minimum security requirements in terms of length and complexity of passwords, you can make yours as complex as you deem appropriate. 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 via the portal.

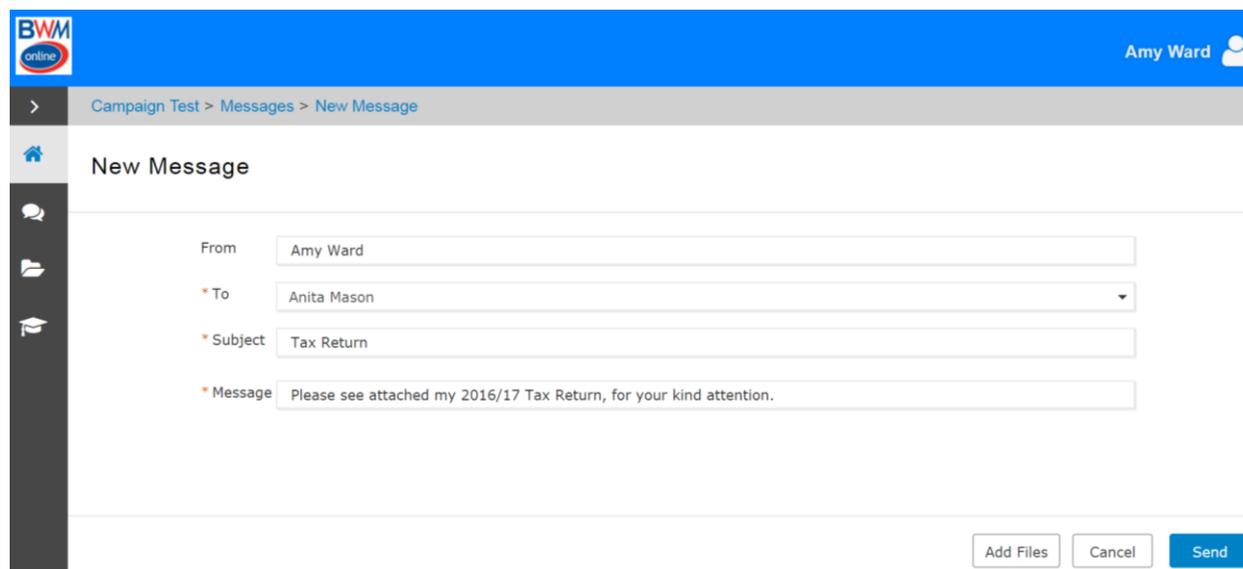


How much can I store in my client portal?

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.

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.



The screenshot shows the 'New Message' form in the BWM online portal. The form is titled 'New Message' and is located under the path 'Campaign Test > Messages > New Message'. The form fields are as follows:

- From:** Amy Ward
- To:** Anita Mason
- Subject:** Tax Return
- Message:** Please see attached my 2016/17 Tax Return, for your kind attention.

At the bottom right of the form, there are three buttons: 'Add Files', 'Cancel', and 'Send'.

Please note that the timeout is 20 minutes of inactivity and you will be automatically logged out after this time if no clicks or keystrokes are made. A suggestion if you are drafting a longer message where a period of inactivity may be an issue is to type the message in Word (or similar) and then copy and paste this into a portal message when complete.

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.

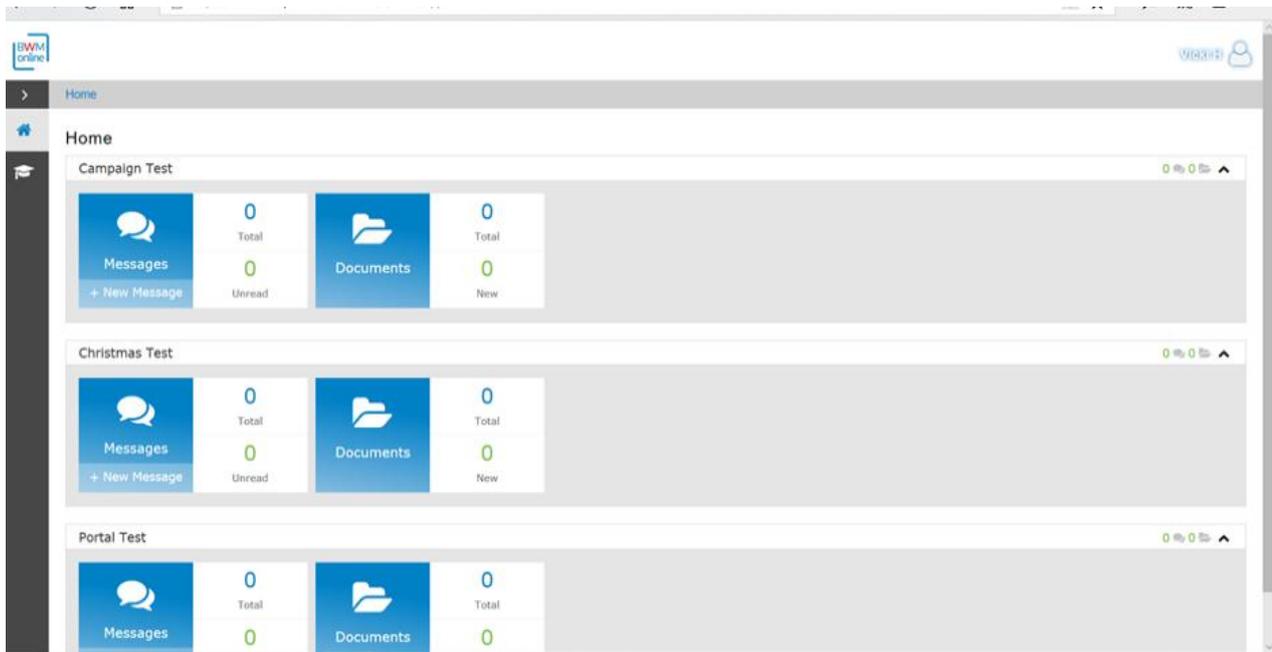
Using the background send function

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

Using multiple portal accounts

If relevant to you, your BWM contact can set up your account so that you can see the portals for all of your organisations and /or your personal tax on the same screen as per the example screenshot below:



When your BWM contact sets this up this additional access you will receive an email from notifications@clientspace.co.uk as follows:

Hello

BWM Accountants Limited has added additional access to your secure portal.

Please click this [link](#) to login and view your messages.

If you are unsure what to do, please call your usual contact at BWM Accountants Limited.

Further help

There are several of tutorial screens available on the portal that can assist you in understanding more about the functionality of the portal. Please do get in touch with your usual contact at BWM if you need further help.

