

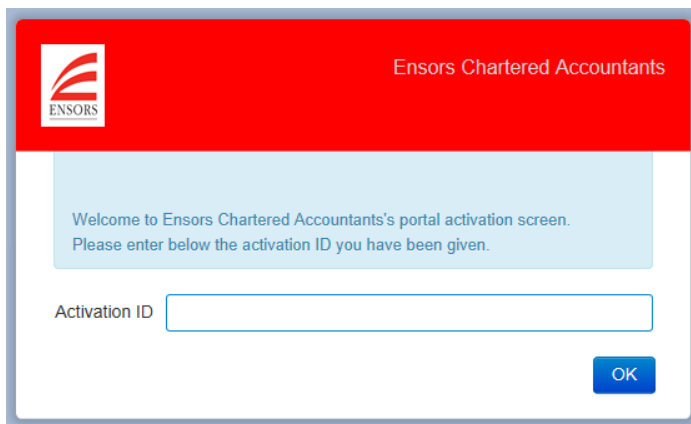
## Ensors OneClick

### Getting started

When we first set you up on Ensors OneClick you will receive an email from [notifications@accountantspace.co.uk](mailto:notifications@accountantspace.co.uk) inviting you to click a link to activate your account.

*(Please note: Emails to this address are not monitored, so please do not respond to any emails from this address.)*

The first screen you will see asks you for your Activation ID. This is your Ensors reference number and we will send this to you when we first invite you to activate your account. It can also be found at the top of letters as part of your Ensors Reference and, of course, your Ensors contact will always be able to provide it.



The screenshot shows a web browser window with a red header bar. On the left of the header is the Ensors logo, and on the right is the text "Ensors Chartered Accountants". Below the header is a light blue box containing the text: "Welcome to Ensors Chartered Accountants's portal activation screen. Please enter below the activation ID you have been given." Below this box is a text input field labeled "Activation ID" and a blue "OK" button.

You will then be asked to create a password which must be 6 characters in length and contain at least 1 uppercase character, 1 lowercase character and 1 number.

The screenshot shows a form titled "Please create your own password". At the top, there is a blue box with the following text: "Thank you for activating your portal access. Please now enter a password which you should not reveal to anyone. The password should: - be at least 6 characters long. - contain at least 1 uppercase characters. - contain at least 1 lowercase characters. - contain at least 1 numbers." Below this, there are two input fields: "Password" and "Re-enter Password". At the bottom right, there is a blue "OK" button.

*(Please note: Only you will know what this password is, so please keep it safe and confidential.).*

You will then be asked to choose two security questions and provide answers to them. These are used in the event that you forget your password.

The screenshot shows a form titled "Security questions". It contains the text: "If you forgot your password, we will ask you for the answers to the security questions below:". Below this, there are two rows for selecting questions and providing answers. The first row is labeled "Question 1" and the second "Question 2". Each row has an "Answer" label. A dropdown menu is open for "Question 1", showing a list of questions: "What is your favourite restaurant?", "What is your favourite song?", "What is the name of your favourite book?", "What is the name of the hospital where you where born?", "What was the last name of your favourite teacher?", "What was the name of your second pet?", "When you were young, what did you want to be when you grew up?", "Where did you meet your spouse?", "Where were you New Year's 2000?", "Who was your childhood best friend?", and "Who was your childhood hero?". At the bottom right, there is a blue "OK" button.

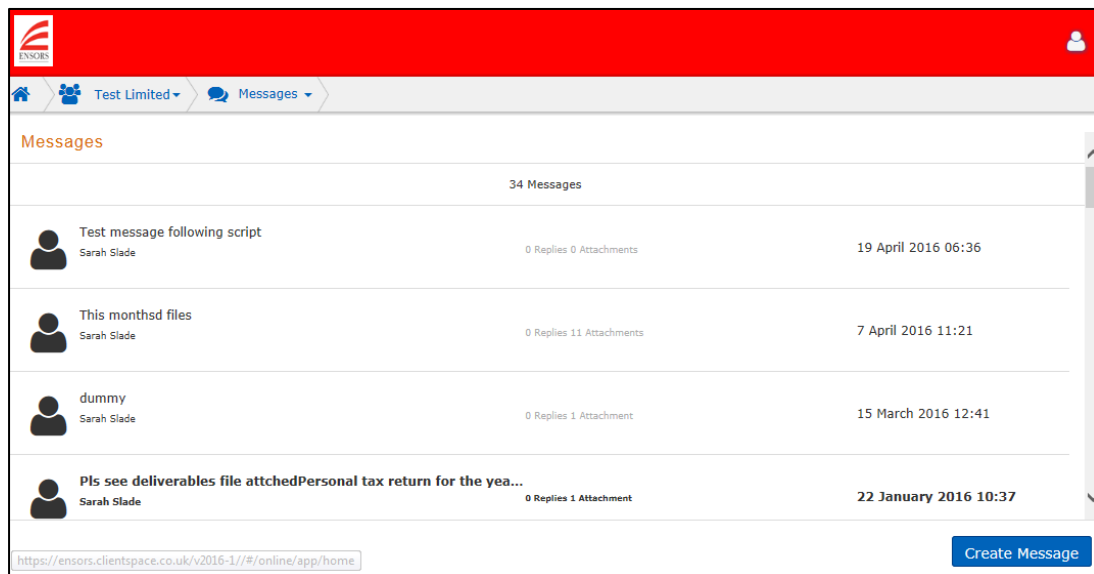
Once this activation process has been completed you can start working with us using OneClick.

## Logging in

When you log in to OneClick you will be asked for:

- Your user name – this is the email address that we currently use to communicate with you and the email address used to notify you that there is a new message for your attention.
- Your password as set up on activation.

You will then be presented with the Message Centre which will show, in time and date sequence order (newest first) any communications between you and Ensors.



From here you can read and reply to messages we send you as well as create new messages to send to us. You can also upload, view and approve documents. It all works in much the same way as email: except it is much more secure.

## Creating and receiving messages

To send a new message to us, select “Create Message” in the Messages & Documents area and you will see the following screen.

The screenshot shows a web interface for creating a message. At the top left is the ENSORS logo. Below it is a navigation bar with 'Test Limited' and 'Messages'. The main heading is '< Create Message'. The form contains the following fields:

- From:** Sarah Slade
- \* To:** Stephen Runnades (dropdown menu)
- CC:** Adrian Hendry (dropdown menu)
- \* Subject:** |
- \* Message:** (empty text area)

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

You can select the person you wish to get in contact with at Ensors using the drop down box in the ‘To’ field. Include a ‘Subject’, your message and then add any files and documents from your computer that you may wish to send us. Please be aware that there is a 20 minute time out. Hence, if you start drafting a message and get called away, you will lose its contents if you do not return to OneClick within 20 minutes. If this is a problem then you can draft your message within another application eg. Word, and copy and paste the text into OneClick when complete.

When you are ready to send the message, click ‘Send’.

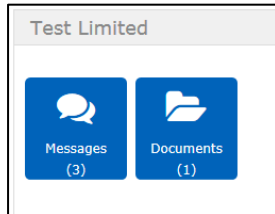
The message and links to any documents you have uploaded will then appear in the Messages & Documents area.

When we send you messages on OneClick, you will receive an email from [notifications@accountantspace.co.uk](mailto:notifications@accountantspace.co.uk), with a link that will take you to the login page.

Having logged in, you will then be directed to the Messages & Documents area where you will be able to see our message.

## Where are documents kept on OneClick?

Documents that either you or we have sent to using OneClick can be accessed from the Documents option.



From here you will see a list of folders you can click into to see your documents. These may be subdivided per year.

Any documents you wish to retain must be saved by clicking on the file and choosing the location to save to. Files may be deleted 3 months after supplying.

Documents you share with Ensors will be stored in the Shared folder.



## **How do I access OneClick once I've closed down my browser?**

Browse to [www.ensors.co.uk](http://www.ensors.co.uk) and click the Ensors OneClick link at the top of the page.

## **What happens if I deal with Ensors in several different ways?**

If we look after several aspects of your financial life: for example we work with your company or business, your family or your trust as well as your own personal financial matters, you will still only need a single login to access all your “accounts” with us.

However, each “account” will need to be set up before you are able to view them. This simply requires us to make them active. You will not be required to go through the activation process for each “account”.

Once all “accounts” are active you will be able to view them all through OneClick.

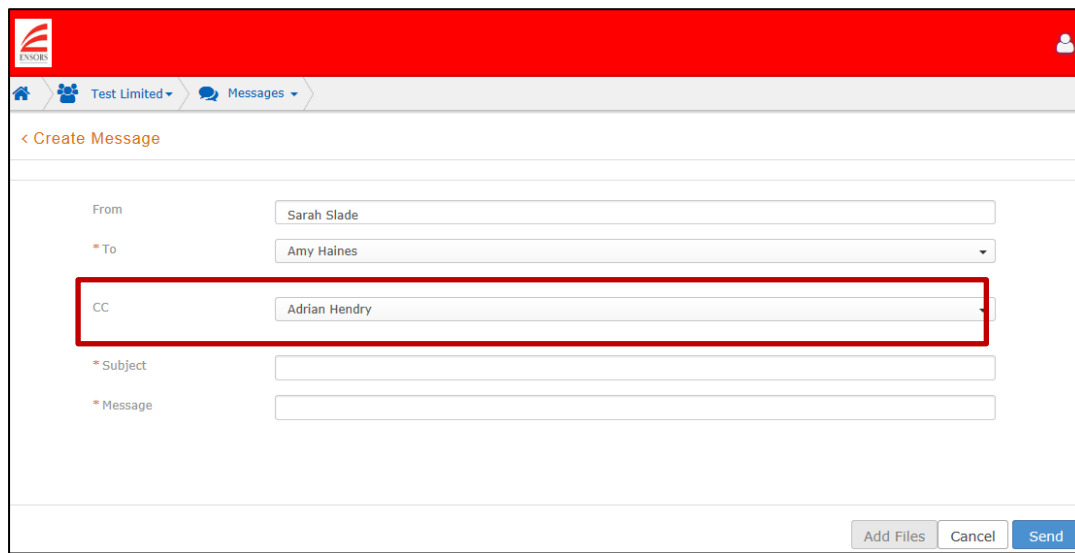
## **What happens if there are several people that need access to a particular “account”?**

Whether we are looking after your family or business interests, we often communicate with a number of your team over matters relating to a particular “account”. For instance, in the case of a company, we might work closely with the directors, the shareholders, and some of the financial team such as bookkeepers and payroll clerks. Where relevant, we can provide separate access to OneClick to any or all of these individuals so we can communicate with any or all of you using Messages & Documents.

In the event of changes to your team, it is important that Ensors are advised to ensure the OneClick account for the person departing is promptly deactivated.

While all communications can be made available to everyone who has access to OneClick, there will be times when there is sensitive data which only a few people should see. Alternatively there may be communications over accounting adjustments which only needs to be sent to us, not everyone in your team.

To manage who sees a new message, you can select your colleagues using the “cc” field.



By default, when you create a new message, all are included, but you can quickly exclude people by clicking the drop down arrow and removing the tick against their name. Likewise when we send you a message, we can select the recipients in a similar manner.

Replies from you or us in respect of that message chain can only ever be seen by the original recipients, or a reduced subset of them. When people are removed, they can then not be added back in later to that exchange, so avoiding erroneously making communications visible to people who were earlier excluded in that discussion.

### Personalising your profile

You can personalise your profile with a photo. To do this click "Edit profile"



You will then be able to browse your computer for a .jpg photo file

Upload your photo



Only Jpegs accepted, maximum size is 1Mb, dimensions will be changed.



**Watch the video**

There is a short video that goes through the above points. You may wish to have a look at this.

<https://vimeo.com/217184181>

We look forward to working with you over OneClick and, as ever, if there are any problems or queries please don't hesitate to contact your usual Ensors contact.