

## Using Ensors Client Portal

We are pleased to introduce Ensors new client portal and look forward to collaborating more closely and securely with you over it in the future.

### Why use a client portal?

Take a look at this short video (less than 5 minutes) <http://play.buto.tv/ngBxn> which explains why we have decided to use a secure portal to work more closely with our clients.

### How does the client portal work?

This second short video <http://play.buto.tv/j4Fvz> shows you some of the key areas of our client portal. You can also follow the instructions below.

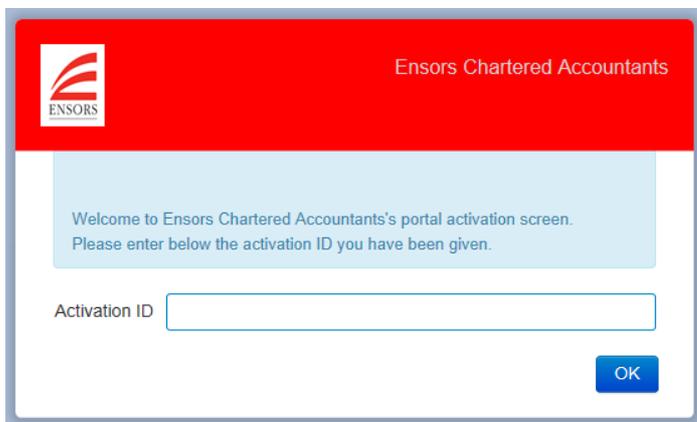
### Getting started

In order to get started with our client portal you will need to know the following:-

- Your client portal username. This will be the email address you have said you wish to use to communicate with us electronically.
- Your activation ID. This is your practice client reference. We will tell you what this is before we invite you to activate your client portal. If you're not sure what this is, do ask someone in the practice to confirm.

When we have set up your client portal access, you will receive an email from [notifications@clientspace.co.uk](mailto:notifications@clientspace.co.uk) inviting you to click a link to activate your account. Please note that emails to this address are not monitored, so please do not respond to any emails from this address.

When you follow the link, you will be presented initially with a screen requesting your activation ID. You should have received an email from Ensors containing this information.



ENSORS Chartered Accountants

Welcome to Ensors Chartered Accountants's portal activation screen.  
Please enter below the activation ID you have been given.

Activation ID

OK

You will then be asked to create a password which meets the minimum password security requirements listed.

Please create your own password

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.

Password

Re-enter Password

Please note only you will know what this password is, so please keep it safe and confidential.

Once this activation process has been completed, you can start working with us in the secure client portal.

When we send you further communications on the client portal, you will again receive an email from [notifications@clientspace.co.uk](mailto:notifications@clientspace.co.uk), but this time the link will take you to a login page, where you need to enter your username (the email address to which the notification has been sent) and your password (set on activation above).

In the event you have forgotten your password, simply click the "Forgot your password?" link, enter your email address, and await a temporary password.



Ensors Chartered Accountants

User name

Password

[Forgot your password?](#)

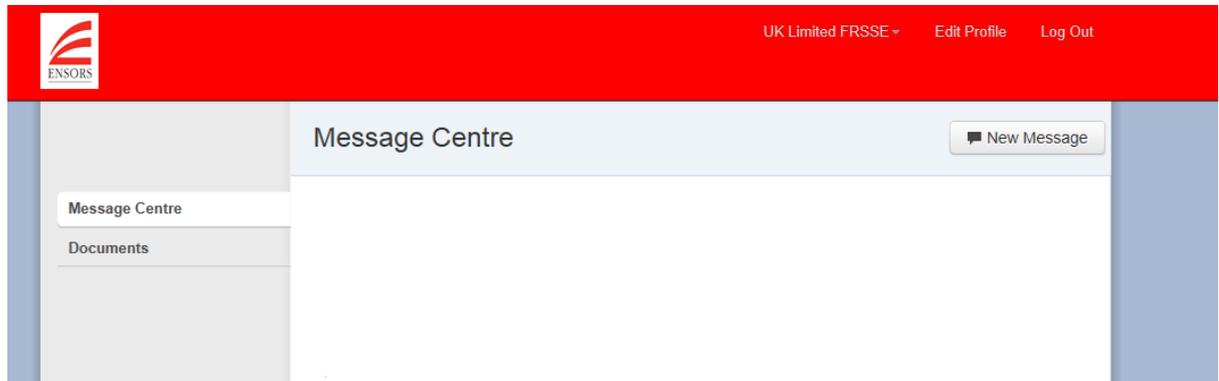
Remember me

Making you more than just a number

On receipt of the temporary password, follow the link to log in with that new password (and your email address as username, as before). You will then be asked to enter your activation ID (just as you did when you activated your account at the start). Finally, you will be asked to create a new password. Where the system requests the "Old Password" this is the temporary one you have just been sent.

### What happens next?

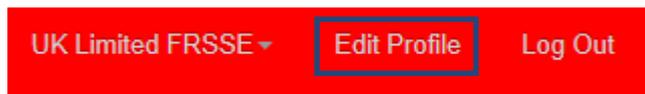
Once you have logged in you will be presented with the Message Centre which will show, in time and date sequence order (newest first) any communications between you and the practice.



From here you can read, reply to and create new messages as well as uploading, viewing and approving documents.

### Personalising your profile

If you want to personalise your profile with a photo, click "Edit profile"



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



### Creating a new message

To send a new message to us on the client portal, select "New Message" in the Message Centre and you will see the following screen, from which you can select the person in our firm you wish to get in contact with (using the drop down in the To field), and include a subject, a message and add files and documents from your computer you wish to send us, if any.

### Create New Message ✕

From:

To:

CC:

Subject:

Message:

When you are ready to send the message, click Create Message. The message and links to any documents you have uploaded will then appear in the Message Centre.

### Documents

Documents which either you or we have sent to the portal can be accessed in two places. The first is from the file hyperlink in the message centre



#### Accounts and Corporation tax for the year ended 31 December 2012

From Jenny Finch on 16 May 2014 09:24

To: David Test

CC: Caroline Test

Dear

I am pleased to attach the company's draft accounts, tax return and associated computations for the year ended 31 December 2012. for your review and approval together with an accompanying letter which explains the key points of note including the tax liabilities arising and the due dates for payment.

Should you have any queries please do not hesitate to get in touch.

Kind regards.

Christa

[Computation & Tax Return 01-01-2012 to 31-12-2012.pdf](#)

[↩ Reply](#)

Alternatively, you can select the Document Centre tab, where you will find the files in relevant folders.

Documents		
Message Centre	Shared	1
<b>Documents</b>	Accounts	0
	2013	4

[Computation & Tax Return 01-01-2012 to 31-12-2012.pdf](#)  
Jenny Finch, 16 May 2014 09:25

Any files you have uploaded will be in the Shared folder.

### Approving documents

Now that documents for the various government authorities such as HM Revenue & Customs and Companies House do not require original signatures, and indeed they largely expect documents to be submitted to them electronically, we are able to use the document approval facility within our client portal to securely and efficiently obtain your approval (or rejection as relevant) to documents.

Any documents sent for your approval will be clearly marked as such. If, following a review of the document(s) you are able to confirm your approval, please tick the check box against each document and select "Approve Documents"



**Personal tax return for the year ended 5 April 2014**  
From Christa Spencer on 18 May 2014 18:19  
To: David Test  
Dear David

I am pleased to attach your personal tax return for the year ended 5 April 2014 for your review and approval together with an accompanying letter which explains the key points of note including the tax liabilities arising and the due dates for payment.

Should you have any queries please do not hesitate to get in touch.

Kind regards

Christa

[David Test Tax Return 2014.pdf](#)  
**Your approval is needed**

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**1**  
TO APPROVE

[Tax Return supporting letter.docx](#)

[← Reply](#)

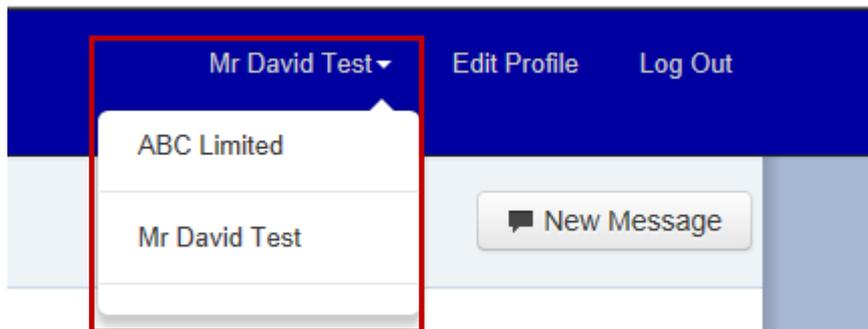
You will then be asked to input your client portal password.

If you have rejected the document, you will be able to enter a note explaining the reason for the rejection. Once we have received your approval over the client portal, we will submit documents to the authorities without further recourse to you. Please therefore ensure you discuss with us any queries, amendments or other concerns, prior to approving any documents in this manner.

### What if we have more than one client relationship with you?

With many of our clients, we don't look after just one aspect of your financial life but several. Whether we work with your company or business, your family or your trust as well as your own personal financial matters, you will only need a single login to access all your "accounts" with us.

Once we have confirmed that we have created client portals to each of your accounts, you will log in as discussed above, and can then select the relevant account from the drop down in the top right corner of the client portal



### What if a number of us work with the firm in connection with an account?

Whether we are looking after your family or business interests, we often communicate with a number of you 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 company's team such as bookkeepers and payroll clerks. Where relevant, we can provide separate access to the client portal to any or all of these individuals so we can communicate with any or all of you in the same client portal area.

While all communications can be made available to everyone who has access to the portal area, 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. The process of restricting who sees what messages and associated documents couldn't be easier. When creating a new message, you can select as many or as few of your colleagues in the "cc" field as you wish to add.

A screenshot of a "Create New Message" form. The form has a title bar with "Create New Message" and a close button (x). The "From" field is "David Test". The "To" field is a dropdown menu with "Please select". The "CC" field is a dropdown menu with "Caroline Test" and "Jane Test" selected, each with a red cross icon to its right. The "Subject" field is empty. The "Message" field is a large text area.

By default, when you create a new message, all are included, but you can quickly exclude people by clicking the red cross 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 – we can both remove people from responses in the chain. 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.

Where more than one individual is required to approve a document, you will all be approving the same document through the client portal, and will have visibility of who has approved and or rejected documents, and who has yet to take any action. Where 1 person has rejected a document, we treat it as rejected even if others have approved it, to ensure we address any concerns prior to submission.

 **Corporation tax for the year ended 31 December 2012**  
From Christa Spencer on 16 May 2014 09:10  
To: David Test  
CC: Caroline Test  
Dear

I am pleased to attach the company's draft tax return and associated computations for the year ended 31 December 2012. for your review and approval together with an accompanying letter which explains the key points of note including the tax liabilities arising and the due dates for payment.

Should you have any queries please do not hesitate to get in touch.

Kind regards.

Christa

**CAS photo lightened.jpg**  
You approved this document on 16 May 2014 09:11 ✓

**2**  
APPROVED

**betty-boop-tattoo-tee-bb529b.jpg**  
You approved this document on 16 May 2014 09:15 ✕

<b>1</b> APPROVED	<b>1</b> REJECTED
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**Computation & Tax Return 01-01-2012 to 31-12-2012.pdf**  
You rejected this document on 16 May 2014 09:15 ✕

**2**  
REJECTED

We look forward to working with you over our new client portal. As ever, if you have any questions or concerns, please don't hesitate to get in touch with us.