ormerod rutter
chartered accountants

ONECLICK GUIDE FOR CLIENTS

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Contents

1. OneClick Activation

To enable you to use both the Messages & Documents and the Digital Data Request functionality within OneClick, you will need to have an activated OneClick account

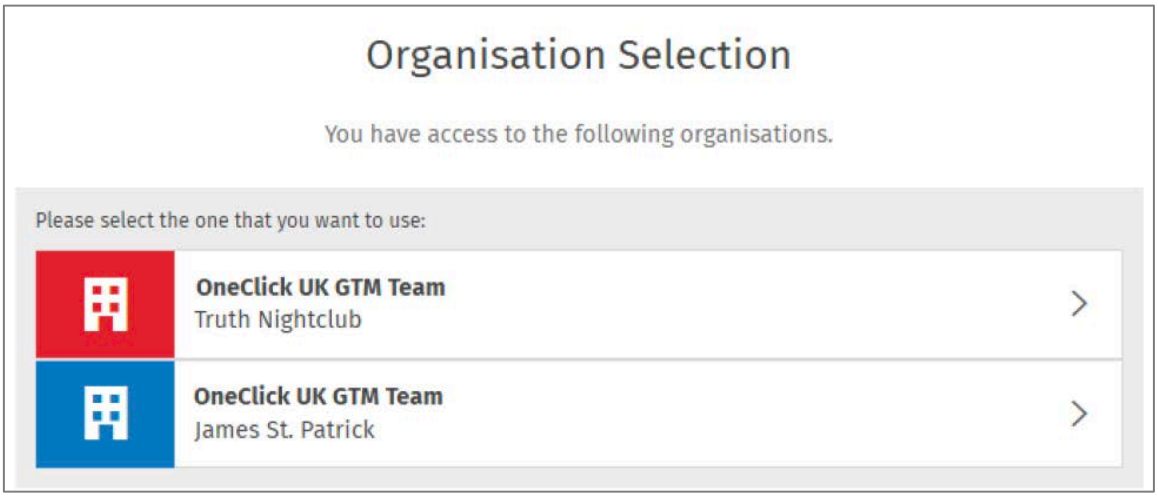
If you haven't already activated your workspace, you should have received an activation email sent by your accountant from notifications@accountantspace.co.uk

- Click the link in the email to setup your account and create a password
- Next, setup multi-factor authentication (MFA) to ensure your account is secure
- Log into the client workspace

If you need help with the activation process or setting up MFA, please refer to the relevant videos on this page

Organisation Selection Screen

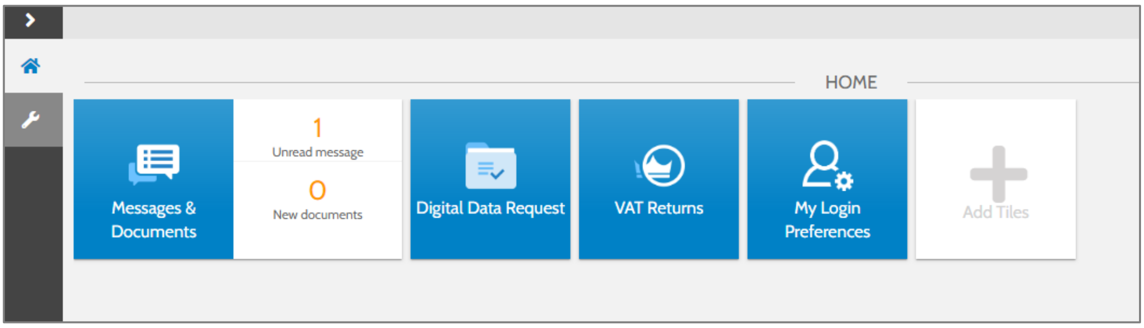
If you have access to to more than one account, when you login, you will be prompted to select which account you would like to view using the organisation selection screen



Once you have logged in, you can select **Switch Account** to come back to this screen and view another account

Client workspace

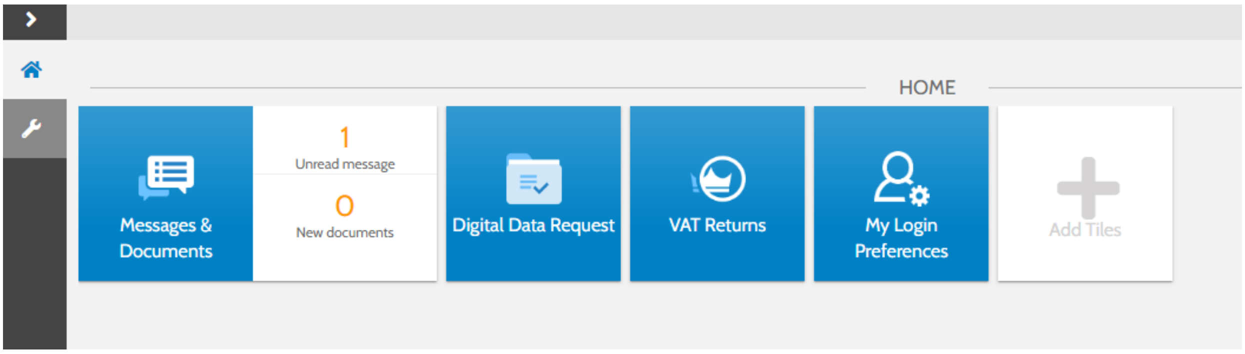
Your workspace will show the **Messages & Documents**, **Digital Data Request** and/or the **VAT Returns** tiles depending on the access given to you by your practice



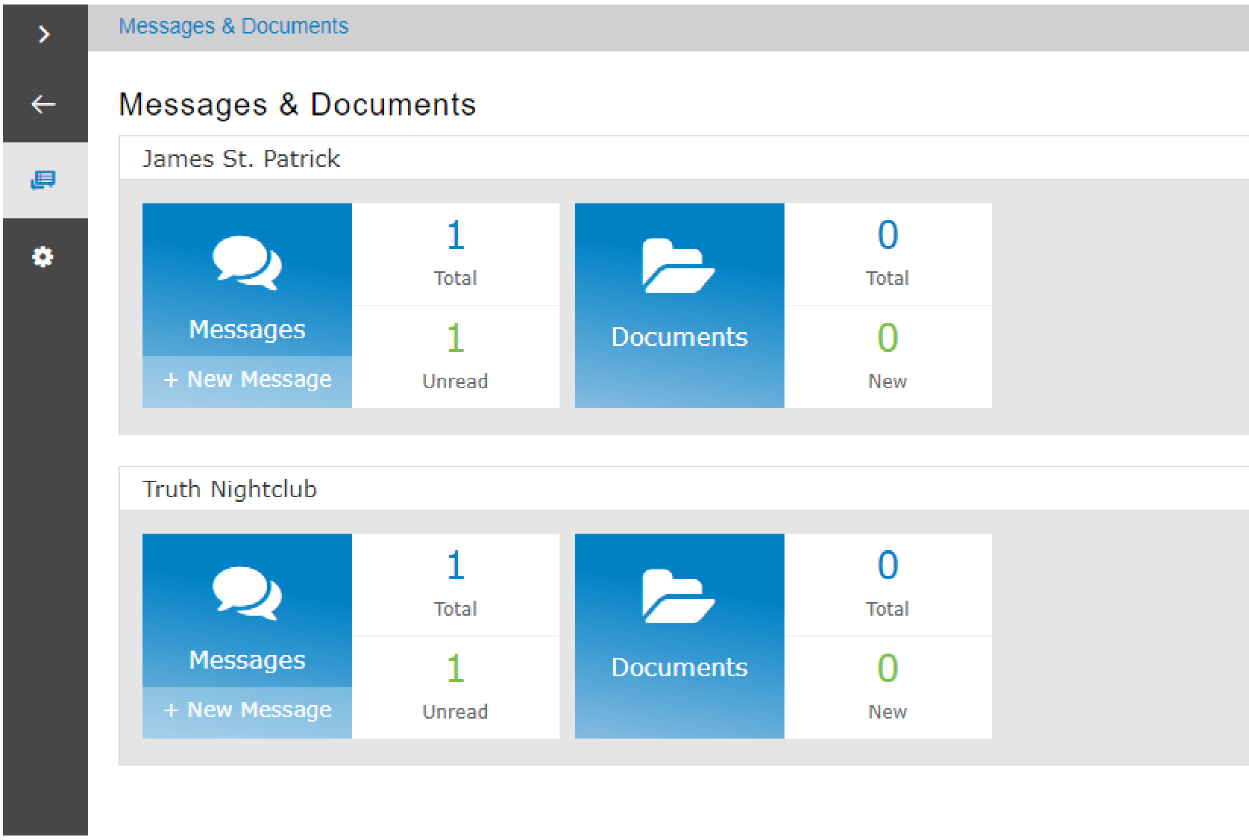
Select the **My Login Preferences** tile to change your password or add/amend MFA options

2. Messages & Documents

- Messages & Documents is the functionality within OneClick that allows you to exchange messages, files and information online (previously known as Client Portal)
- It is accessed through your client workspace within OneClick

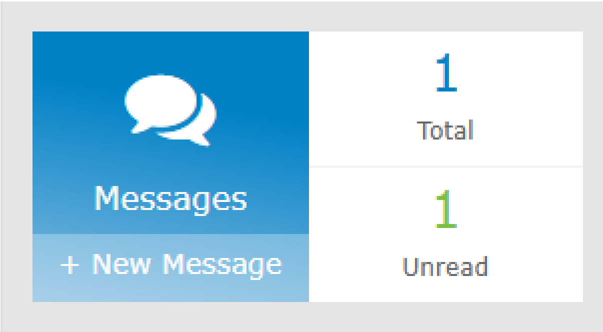


- From within Messages & Documents, you will see all accounts that you have access to
- If you are an associated contact of multiple businesses you will be able to see them all here



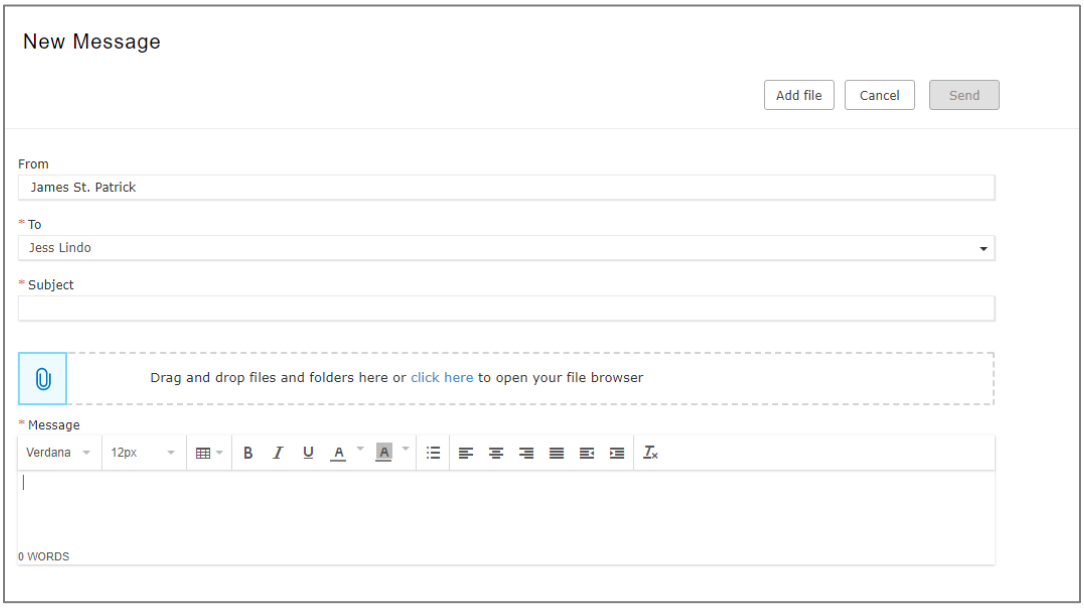
2.1 Messages

- The Messages tile will take you to the conversations for that account
- There is also an indicator here of how many messages you have and how many are unread
- You will be sent an email notification when you receive a new message

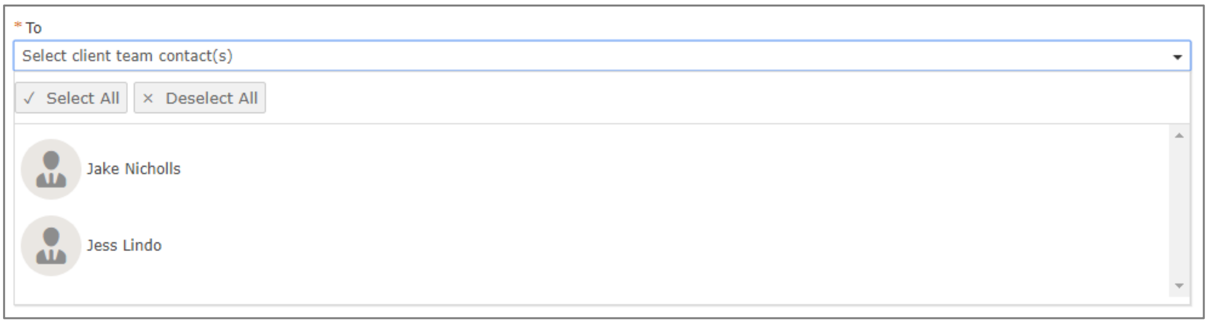


Create a message

- Select the + button at the bottom right of the screen to create and send a new message



- The To section is a required field. The dropdown list will allow you to send a message to any member of your client team
- Multiple employees who are in your client team can be copied in when creating or replying to a message. Additional employees will appear in the **To** field

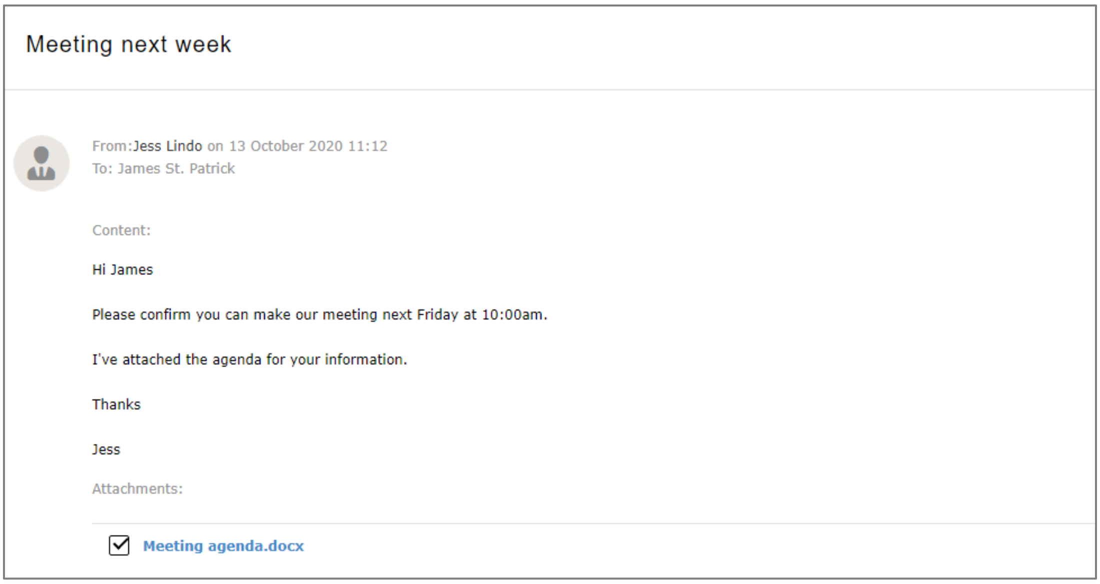


- The subject and message sections are also required fields so must be completed before the message can be sent
- Use the **Add file** button or drag and drop files to add an attachment to the message

Message list

- The exclamation mark signals that there is a document within this conversation needing your approval

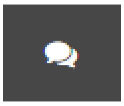
- Open the message and select which option you'd like to choose



- If approving the document, enter your login password
- You will have to view the document first before it can be approved

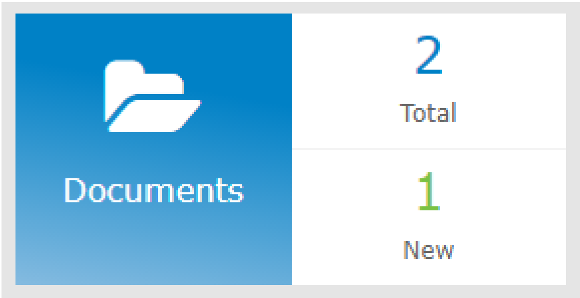
- Use the overview icon to return your list of available accounts, or the messages icon to return to the message list


Overview

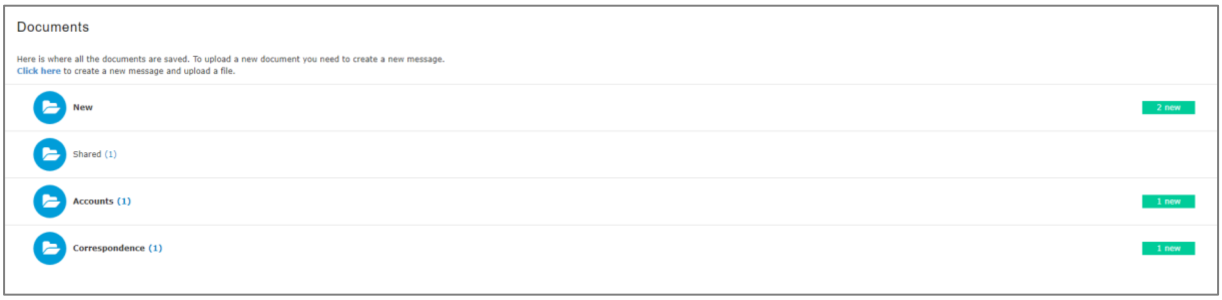

Messages

2.2 Documents

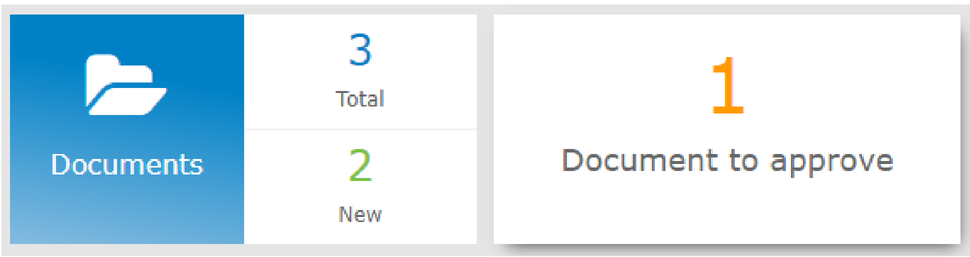
- The documents tile will take you to all the documents available for that particular account
- Select the new folder to view all the latest documents that have been received and not yet reviewed



- Documents will be split out into folders (as specified by your accountant)

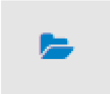


- Access any documents needing your approval here



- Tick the checkbox next to the relevant document and select Approve, Reject or Download
- You will need to enter your password to confirm your decision

- Click the documents icon to return to your document list



3. VAT Returns

A separate guide to show you how to use the VAT Returns functionality can be found here