

Mitchell Oswald Client Portal Guide

BEFORE USING THE CLIENT PORTAL YOU MUST READ OUR PRIVACY POLICY

Accessing the portal for the first time

To access the portal you must have an account created for you and you will receive an email with login details. If you have not received these please contact us.

The email will include a link to allow you to set your password for accessing the portal. The link is noted below; -

<https://mitchelloswald.co.uk/wp-login.php?action=lostpassword>

After clicking on the link you will see the following screen; -



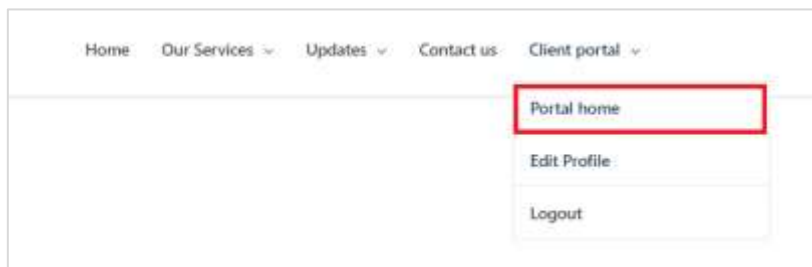
Enter your username when prompted and click on 'Get New Password'. You will then receive an email with a link to reset your password which will take you to this screen; -



Enter your chosen password (passwords should be at least 8 characters long, contain mixed case letters and at least one number) and click on 'Reset Password'. You will then be able to login using your username and chosen password.

When you login for the first time you will be directed to our Privacy Policy, please read this before continuing to the client portal home page.

To access the portal home page select 'Portal home' from the 'Client portal' menu.



Accessing the portal after you have set your password

To login enter the following address into your browser; -

<https://mitchelloswald.co.uk/login>

You will then see the following screen; -



Enter your details and click on 'Log in'.

If at anytime you forget your password there is a 'Lost your password?' link underneath the login box. If you click on this and enter your username or email address you will be sent a link to reset your password.

The portal home page

The portal home page is divided into five sections; -

The screenshot shows the Mitchell Oswald client portal home page. At the top left is the Mitchell Oswald logo. The top right navigation menu includes: Home, Our Services, Updates, Contact us, and Client portal. The main heading is "Welcome to the Mitchell Oswald client portal". Below this, a message states: "Hi New Client, welcome to our client portal. From this page you can access your documents and send us secure messages. You can also upload documents to the portal. You will receive email notifications when documents are uploaded for you or when you are sent a secure message." A note follows: "Please add the following email address to your safe senders list - clientportal@mitchelloswald.com. Your notifications will be sent to chinaboy738@gmail.com". A link is provided: "To change your details, select 'Edit Profile' from the client portal menu." The page is divided into five sections: 1. "Approvals required" (highlighted in grey) with the sub-heading "Items which require either your approval or comment will appear here." and a list item: "Your tax return [14/05/2018 12:12 pm]". 2. "Your documents" with a search bar and a table of documents. 3. "Private messages" with a navigation bar (NEW, Inbox, Sent, Archive, Trash) and a message box containing "No Messages". 4. "Files that you have uploaded" with a search bar and a table of uploaded files. 5. "Upload files" with a large grey area for dragging files and a progress bar at the bottom showing "0.0 b" and "0%". At the bottom left, there is a copyright notice: "© 2013 - 2018 Mitchell Oswald Limited | Cookie policy | Legal notice | Privacy Policy". At the bottom right is the Chartered Accountants logo.

Filename	Size	Uploaded Date	Category
Client upload.pdf Client signed tax return	144.4 K	14/05/2018 1:59 pm	General
TEST DOC.pdf Test Doc	144.4 K	14/05/2018 1:54 pm	General

Filename	Size	Uploaded Date
Client upload.pdf Client signed tax return	144.4 K	14/05/2018 1:59 pm

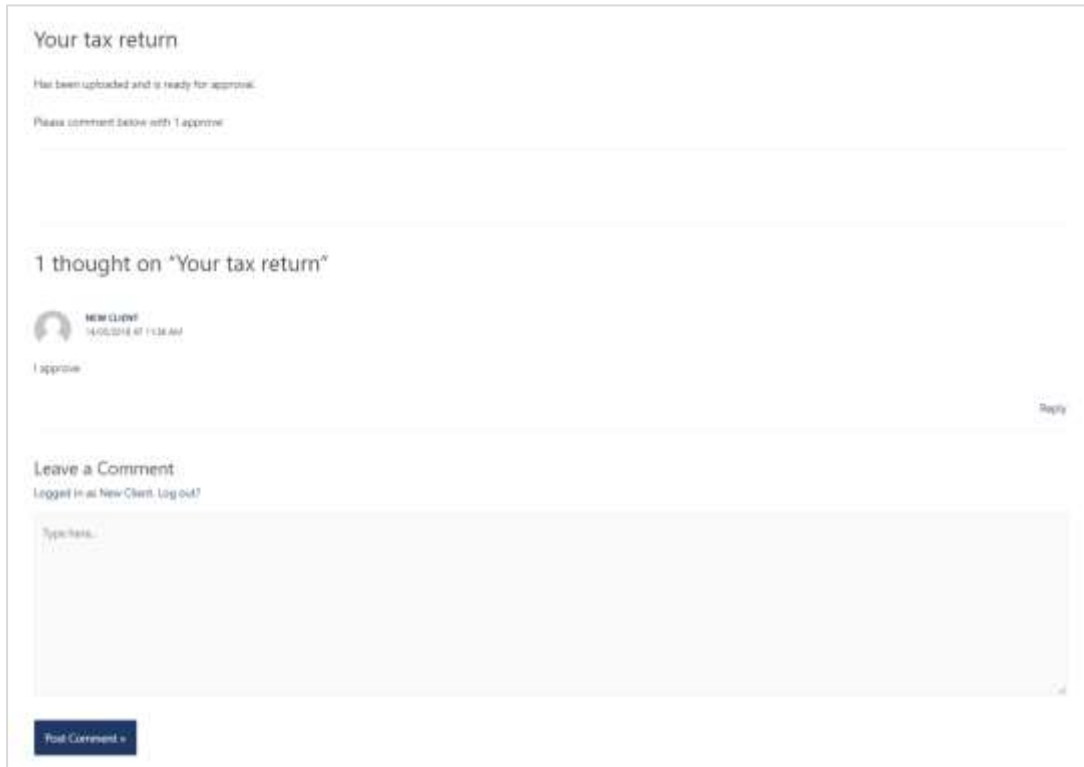
Approvals required

This is a close-up of the "Approvals required" section. It features the heading "Approvals required" and the sub-heading "Items which require either your approval or comment will appear here." Below this, there is a single list item: "Your tax return [14/05/2018 12:12 pm]".

If you have any documents which require your approval or review such as your tax return or accounts a message will appear here.

Click on the link to view the message. If the message refers to an uploaded document the document will appear in the 'Your documents' section.

To indicate your approval or make a comment enter this into the 'Leave a Comment' box.



Your Documents

This section contains all your files, both files that you have uploaded and files that have been uploaded for your attention.

Your documents

These are all the documents that are available for you to view. You can filter this list to show only certain categories of documents by clicking on the filter button.

ADD FILTER

2 items

Filename	Size	Uploaded Date	Downloaded	Category
TEST DOC.pdf Test Doc	144.4 K	14/05/2018 1:54 pm		Statutory Accounts
Client upload.pdf Client signed tax return	144.4 K	14/05/2018 1:59 pm		General

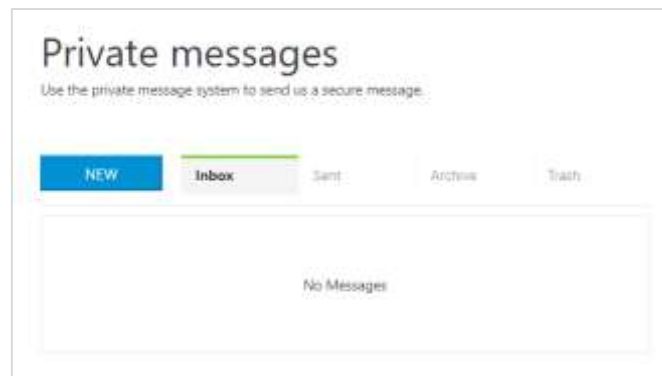
2 items

To view the file either click on the file or if you hover over the file two further options, view and download, will appear.

You can sort the files by clicking on the column headers and you can also show only items in a certain category by clicking on the 'Add Filter' button.

Private messages

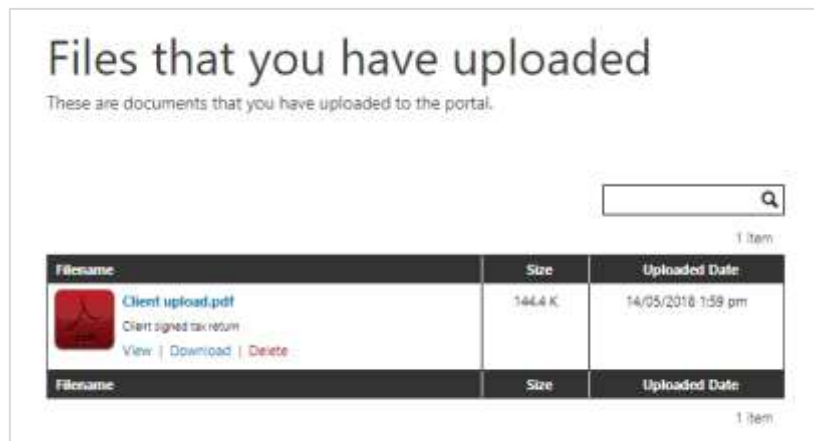
The portal allows you to send and receive private messages.



You can use this function to ask questions or to provide information.

Files that you have uploaded

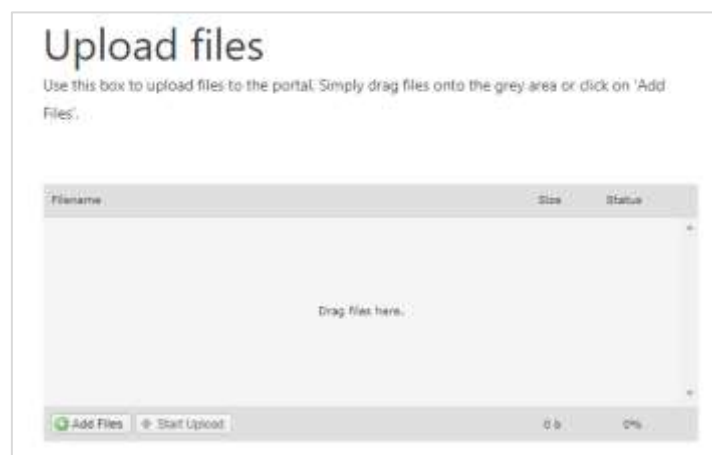
This section contains only the files that you have uploaded to the portal.



As with the 'Your Documents' section if you hover over the file name you will see the view and download options. You will also have a third option to delete files that you have uploaded.

Upload files

This section allows you to upload files to the portal.



To upload a document click on the 'Add Files' button at the bottom left hand corner of the box and then select the file you wish to upload. Alternatively, you can drag the file into the grey box.

You can add more than one file at a time.



Once you have added all the files that you wish to upload click on 'Start Upload'.

When the upload is successful a message will appear confirming the successful upload and then the page will refresh and your files should now appear in the 'Your documents' and 'Files that you have uploaded' sections.

Notifications

Whenever messages or documents are created or uploaded you will receive an email from the portal to notify you of this.

The email address to which these notifications are sent is displayed on the top of the page.

You can change this by editing your profile.

We will receive notifications when you upload documents or send us private messages.

Editing your profile / changing your password

This section allows you to view and change your contact name, your registered email address and your telephone number.

You can also change your password from here.

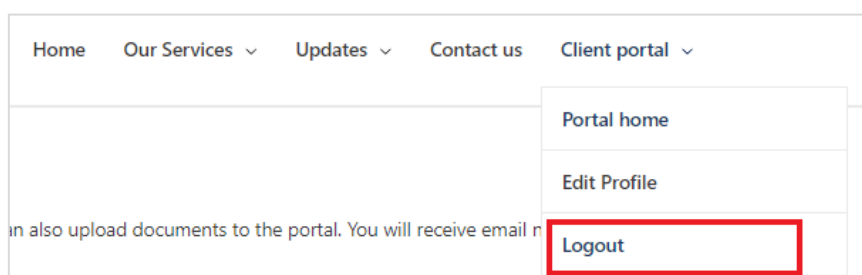
To change your password simply enter your new password into the 'New Password' and 'Confirm New Password' and click on update.

Passwords should be at least 8 characters long, contain mixed case letters and at least one number.

Alternatively, a password can be generated for you by clicking on the 'Generate Password' button. The password will appear next to the button and you should take a note of this before updating your profile.

Logging out

To log out select 'Log out' from the 'Client Portal' menu.



Support

If you experience any problems using the portal, or if you have any questions please contact us.