ACCOUNTANCY PRACTICE LAUNCH PROGRAMME · SET UP A SECURE CLIENT PORTAL

# Client portal how-to guide

A rebrandable one-page guide to send each new client, so they upload, sign and find documents without emailing you.

## 01 Logging in for the first time

Fill these in for your chosen portal, then send this page to every new client.

**How does the client get their login or invite?**

e.g. an email invite with a link to set a password.

**Where do they go to sign in each time?**

The web address or the app name.

## 02 Uploading documents securely

The whole point is that sensitive files never travel by email.

**Where do they click to upload a document?**

**What should they send this way?**

Records, receipts, ID, bank statements. Anything sensitive.

**What should they never email as an attachment?**

## 03 Approving and signing

Engagement letters and accounts get approved in the portal, with a clear record.

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**How do they e-sign an approval or engagement letter?**

**Where do their signed documents live afterwards?**

So they can always find them without asking you.

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