

Client Portal

FAQ's



Client Portal FAQ's

Why is the Portal more secure?

The Simpson Wreford LLP Portal is powered by Virtual Cabinet who have a team of experts to ensure that the latest technologies and best practice is used to ensure the Portal remains a secure environment.

Encryption.

Data is highly encrypted in transit to and from the portal using Extended Validation SSL certification provided by the industry leading certificate issuer, VeriSign. Notice the green address bar when you log into the portal - this means that all traffic to and from the site couldn't be more secure.

Data, documents and files (where applicable) stored in the portal are hashed or encrypted using AES-256.

Data Storage.

In addition to the expected alarms, CCTV, electromagnetic locks, security bars, cages and locked server cabinets, our specialist, UK based, data hosting sites use biometric security measures to protect the live, standby, backup and storage devices on which your data resides across multiple geographical locations.

Penetration.

The Portal is secured behind multiple firewalls. It has been hardened to resist attack methods such as brute force password ciphers, cross-site scripting (XSS), cross-site request forgery (CSRF), JSON hijacking and SQL injection. All hardening is tested and verified by 3rd Party Security specialists.

Auditing.

Every action that occurs within the portal is logged and recorded against the individual that performed it, providing a complete and compliant audit log.

Safe Browsing.

To help ensure the Portal website is safe for browsing it is scanned daily for malware by security experts Symantec.

What will the Portal be used for?

The Portal will be used to exchange documents securely and obtain authorisation/signatures when required.

Some examples are:

- You want to send us paperwork with regards to your tax or accounts affairs. You would upload this through the Portal directly to the appropriate person at Simpson Wreford LLP.
- We want to send you your accounts for signature. We would upload this to your secure portal and request that the document is signed. You would then log on and view your accounts through the Portal and if happy would electronically sign them.

How do I register?

If we usually send your tax return to authorise via email we will automatically register you at the appropriate time. For other documents, like Accounts, we will ask you before what your preference is at the time of sending. If we don't currently use email for authorisation then you can request to move to the secure Portal. All we will need is the email address you wish to use.

When we register you, you will receive an email to setup your secure portal. You simply need to follow the link in the email and complete the required information, including setting your password and recovery information. At no time will Simpson Wreford LLP have access to your password and any future reset will be done on a self-service basis.

If you don't want to use the Portal then you can continue to receive documents in the post. Please let us know if this is the case.

How will I receive notifications that something is in the Portal?

When we publish documents to you, you will receive an email notification from notifications@virtualcabinetportal.com.

The sender's name for this email will show as 'Simpson Wreford LLP' and the subject line will be 'xxx from Simpson Wreford LLP has sent you a pack of documents...'.

The body of the email will then give you instructions of how to register if it is the first time we have sent something to you or will give you a link to access the documents if you have already registered.

Multiple organisations?

You will be registered on the Portal using your email address. So assuming that you use the same email address for all the organisations we deal with, then you will only have one Portal account.

However, if you would like to use different email addresses then we will be more than happy to register multiple accounts for you. Please contact us if that is the case.

The person is not listed, how do I send?

The Portal requires that a secure communication channel is setup between you and the person at Simpson Wreford LLP that you want to send the document to.

This needs to be initiated by us so please contact the appropriate person and they will send you a request for documents.

Is the document always available on the Portal?

Documents for signing will usually be available for 90 days. If you want a copy of a document you can download it to your PC. If you require a specific document, let us know and we can make it available for you to download usually within a matter of minutes.

Client Portal Instructions



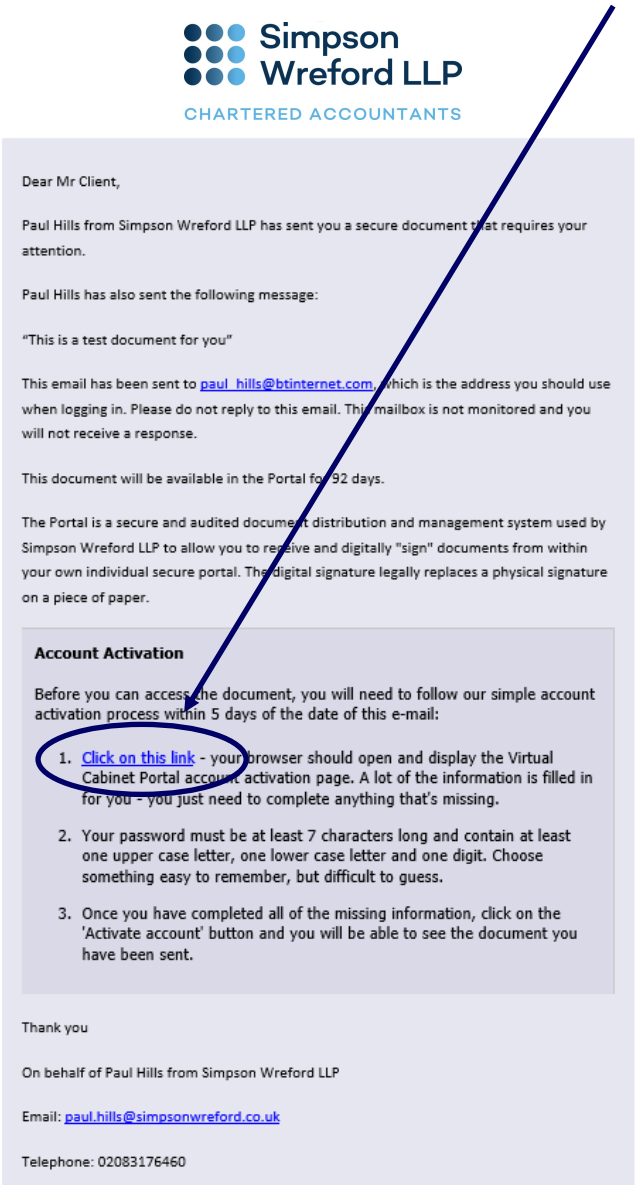
Client Portal Instructions

How to login and use the Simpson Wreford LLP Portal

Account Activation

The first time you are sent a document through the Simpson Wreford LLP Portal, you will receive an email notification. Before you can access the first document that has been published to you, you must activate your account. The activation needs to be completed within 5 working days and the email notification takes you through this process.

Simply read through the instructions in the email, and click the link within the email titled “Click on this link”.



Your browser will open with the following screen which already has your email address included.

Step 1

Enter a **password** which must be at least 7 characters long and must contain at least one upper case letter; a lower case letter; and a number.

Activate your account: Step 1 of 2

LOGIN DETAILS

PERSONAL DETAILS

Welcome to our secure portal

Our portal allows us to communicate with you efficiently and securely.

You need to create your own password and activate your account before you can access the information we have sent you.

Email address

paul_hills@btinternet.com

Password

Your new password

Confirm your new password

Next

[About our portal](#)

Then click **Next**

Step 2

You then need to add some personal details. Your name will already be included. You will also need to tick the boxes and accept the use of cookies and the Terms and Conditions, then click '**Activate Account**'.

Activate your account: Step 2 of 2

Almost done...

LOGIN DETAILS

PERSONAL DETAILS

Title

Mr

First name

Test

Last name

Client

Country

United Kingdom

Telephone number

+44 0123456789

Mobile number

+44 Your mobile number

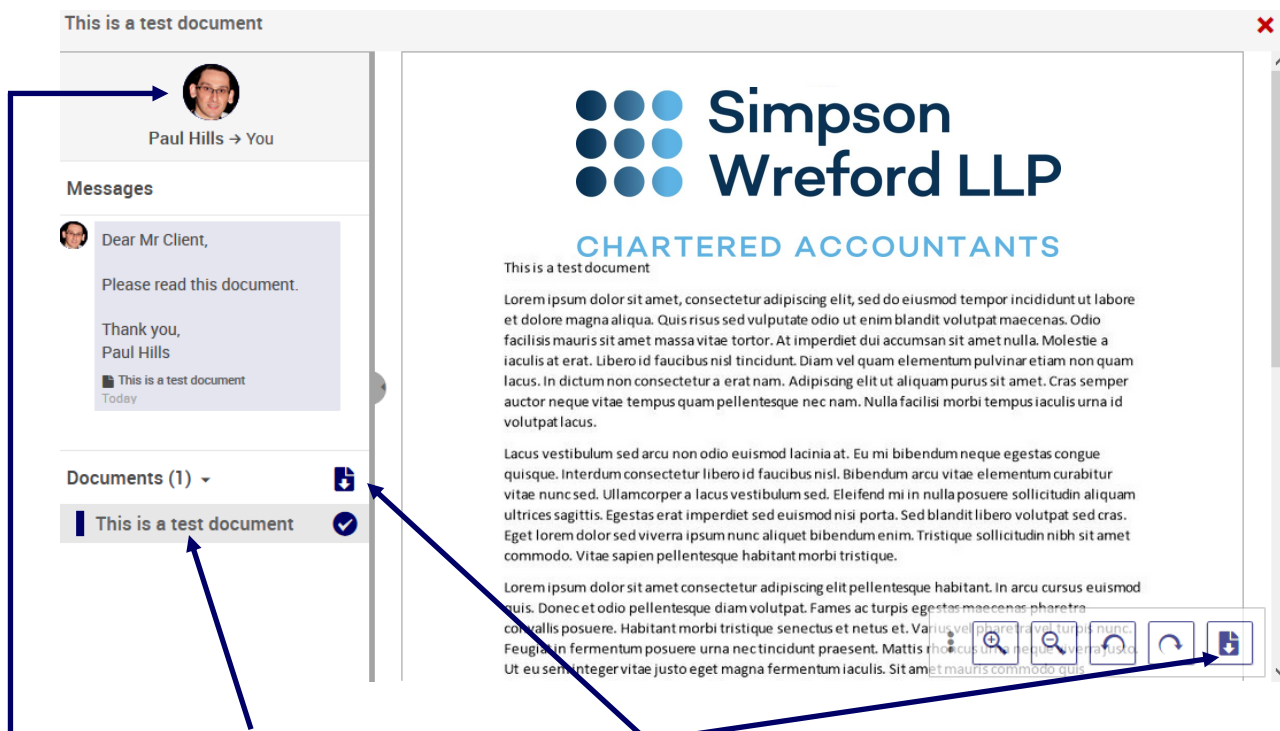
☒ I agree to the use of cookies on this device to enhance my experience. [Cookie Policy](#).

☒ I agree to the [Terms & Conditions](#) and [Privacy Policy](#).

☐ I agree to receive marketing emails for services that may be of interest to me.

Activate account

Once logged in you will see the document that has been sent to you.



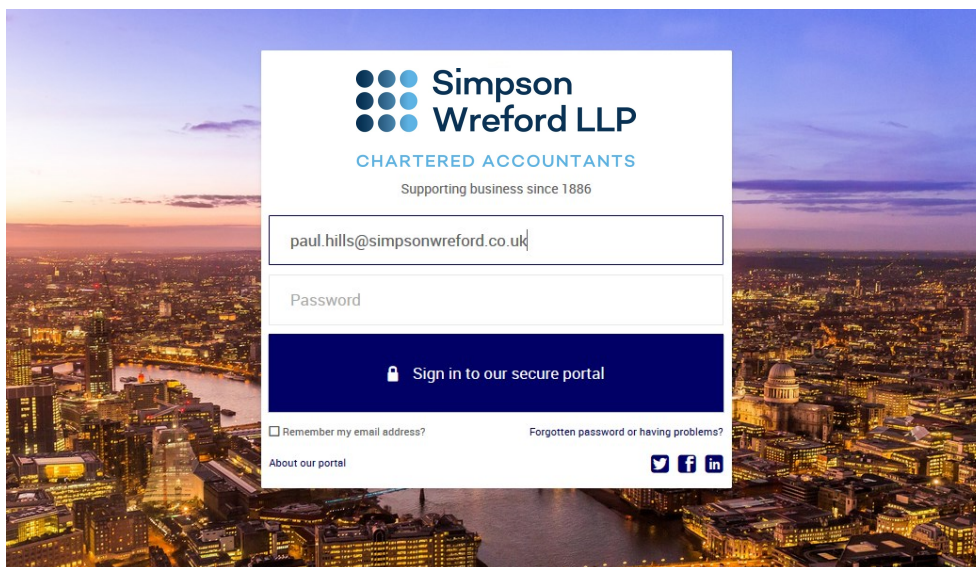
- You can **view your documents here** and also **download them** here so you can permanently store them on your own computer hard drive. Please note that Simpson Wreford LLP will only keep them available on the portal for up to 3 months.
- You can check the details of who has sent the document by clicking on the picture/initials email at the top right hand side of the screen.

Your portal account is now set up and the same email address and associated password can now be used to login for any future documents.

How to access the portal at any time

You may now access your Simpson Wreford LLP portal account at any time from any device by going to:

<http://swportal.uk> which will forward you to our secure portal login screen.



- An email will be sent to you to notify you when any future documents are added to your portal account.
- Please **do not** reply to the notification email. The mailbox is not monitored at Simpson Wreford LLP. We will not receive your message and therefore we will be unable to act on your instructions or send you a response.
- You just need to click on the link in the email to “View the Document” which will then take you to the normal login screen shown previously.
- Once logged in you will again be able to view new documents or see any others that have been published within the last 3 months.
- You will see any outstanding documents requiring your attention or for you to action here in the ‘to do’ section.
- Your own information is in the top right hand corner and this is also where you would log out of the portal.

Simpson Wreford LLP Test Client TC

Simpson Wreford LLP Supporting business since 1886
CHARTERED ACCOUNTANTS

Search

COMPOSE

To do •

All

Today

This week

This month

Today

This is a test document
Paul Hills → You
3rd May 2019 12:16pm

Dear Mr Client,
Please read, sign and reply to this document.
Thank you,
Paul Hills
Today

Read, Reply & Sign

Simpson Wreford LLP
CHARTERED ACCOUNTANTS

Forgotten your password?

Don't worry! If you have forgotten your password for the Portal, simply go to: <http://swportal.uk>

- Click the “Forgotten password or having problems?” link below the “Sign in to our secure portal” button. You will be asked to enter your email and this will generate a password reset link to be sent to you via your email address.

Access Account

Enter the email address associated with your account. We'll send you a link to reset your password or activate your account if you have not already done so.

Continue

Has your email changed? If you no longer use the email associated with your Virtual Cabinet @ Portal account, you may [contact](#) Customer Service for help with restoring access to your account.

- Check your emails, and click on the **password reset link**.
- You will now be able to see the password reset page, allowing you to type in a **new password** for your Virtual Cabinet Portal account.
- Ensure you follow the instructions, and click the “**Save Changes**” button once you are finished.

Document Signing

Some documents require your signature and the portal allows you an easy way to do this safely and securely.



To sign the document, simply click the ‘**sign**’ button at the top of the document. If this is the first time you have been asked to sign a document on your computer then you will be asked to authenticate your device or browser. This is a one off security measure. You will be emailed an authentication link which you will need to click on to action and confirm whether you are using a private or public computer. Once you have completed the authentication you will be able to continue with the digital signing process.

The following screen will give you information about your signature.

Signing Statement

By electronically signing this document, I acknowledge this is the equivalent of providing a written signature on a hardcopy document.

Message

Type an optional message that will also be added to the signed document...

500

Your Signature

Your signature will contain:

✓

information that identifies you

✓

any message you have entered above

✓

your current I.P. address (84.92.89.245)

Sign

Cancel

Click ‘Sign’ and the system will confirm your signature and display the available options for your next action.

At this point the screen will prompt you to also download a copy of the document to then save to your own PC if you would like to do so.

Return to Home Screen

When you have completed viewing a document or have completed any actions required you will need to return to your home screen.

To do this, simply click on the red cross at the top right hand corner of the document.

This is a test document

Paul Hills → You

Messages

Dear Mr Client,

Please read, sign and reply to this document.

Thank you,

Paul Hills

This is a test document

Today

Documents (1)

This is a test document

Please sign and reply

Sign

Decline

Reply

Simpson Wreford LLP

CHARTERED ACCOUNTANTS

Wellesley House, Duke of Wellington Avenue, Royal Arsenal, London SE18 6SS

Phone: 020 8317 6460 Fax: 020 8317 6461 Email: enq@simpsonwreford.co.uk www.simpsonwreford.co.uk

This is a test document

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Quis risus sed vulputate odio ut enim blandit volutpat maecenas. Odio facilisis mauris sit amet massa vitae tortor. At imperdiet dui accumsan sit amet nulla. Molestie a iaculis at erat. Libero id faucibus nisl tincidunt. Diam vel quam elementum pulvinar etiam non quam lacus. In dictum non consectetur a erat nam. Adipiscing elit ut aliquam purus sit amet. Cras semper auctor neque vitae tempus quam pellentesque nec nam. Nulla facilisi morbi tempus iaculis urna id volutpat lacus.

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Simpson Wreford LLP

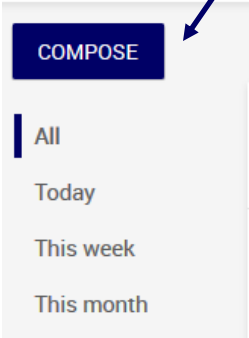
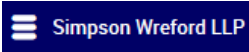
CHARTERED ACCOUNTANTS

Client Portal

Your simple, safe and secure document portal

Sending documents

Once you have an account with the Simpson Wreford LLP portal you will have the ability to send documents whenever you need to via your portal main page after logging in.

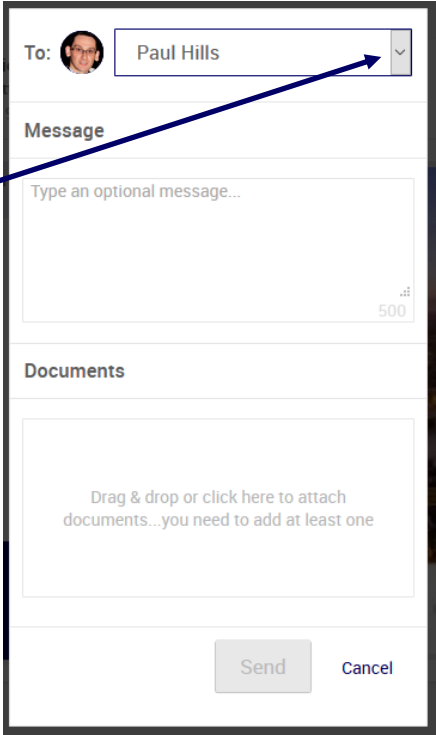



You can send a document at any time via the portal main page. This is done by clicking on the COMPOSE box.

There is a drop down box to select who you are sending the message and documents to. This will show a list of contacts from Simpson Wreford LLP who have previously sent you information.

Select the correct contact, type in your optional message, attach the documents you want to send and then click on the Send button. You will receive a confirmation message that the documents have been sent.

You can select 5 documents at a time and up to 100mb per document.



We occasionally may ask you to reply to us regarding a specific document. If this is the case you will see a reply button  at the top of the document when you view it.

To reply to the document simply click on the reply button. This will show a screen (like above right) allowing you to choose a document from your computer and an area to add an optional message.

Once you have added your documents click send. You will then be presented with a confirmation message.

Troubleshooting

If you are having any issues with accessing the Simpson Wreford LLP Portal web-page, or logging into your Portal account, there are a couple of steps that you can take...

- Trouble related to accessing the Portal web-page may be due to networking issues. You may want to check your internet connectivity (either wired or Wi-Fi) and ensure that you do not have the website in your blocked URL settings.
- When logging on to the Portal, please ensure you use the email address and password that you provided when you activated your Portal account. Double check the email address by checking the notification you received from the Portal.

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