

Introducing OneClick

OneClick allows us to exchange files and documents with you securely and store them safely in the cloud. There is also a secure messaging service built-in, enabling us to communicate about those documents and files in context.

Where there are documents needing your approval, we can use OneClick to upload the documents for you to review, wherever you are in the world, and to approve those documents electronically, saving you time and money.

To access OneClick please visit www.knowleswarwick.com/about-us/portal

Security

- ▶ We take security seriously, and Oneclick contains various safeguards to protect your data.
- ▶ A unique activation code is required to create every Oneclick account.
- ▶ You set your own password. We have set minimum security requirements in terms of length and complexity of passwords, but you can make yours as complex as you deem appropriate.
- ▶ We hold no record of your password. You can reset your password if you forget it, but this requires an activation key that only we can supply.
- ▶ Your data will be encrypted using the 256-bit Advanced Encryption Standard, which is the highest available military-grade encryption.
- ▶ Asymmetric key encryption will be undertaken using two separate encryption keys held in separate locations to maximise security.
- ▶ This is used in conjunction with independent Secure Sockets Layer certification (provided by Symantec) which you will be familiar with from internet banking and other secure websites.

Exchanging Messages & Files



Select 'Messages' and click 'Create Message' to create and send us a message. Select the 'To' field to get a drop down of people in your client team.



If you want to include an attachment in your message, click the 'Add Files' button.



To view and download other documents, select 'Documents' from the 'Messages' menu. Or simply click on the link to the document from within the message.

Approving Documents



Documents waiting for review will be clearly identified.



Simply tick the box next to each document, click 'Approve' or 'Reject' and re-enter your password when requested.

For More Information



Visit: www.knowleswarwick.com/about-us/portal

Call: 0114 2747576

Email: bestadvice@knowleswarwick.com

Getting Started



Each of our clients will have their own secure area inside the portal, kept separate from any other client.



Once we are ready to activate your account, we'll send you a link via email. This email will come from **NOTIFICATIONS@CLIENTSPACE.CO.UK**.



Separately from this, we'll send you your own personal activation ID.



Follow the link from the email and enter the activation ID (which is case sensitive).



You'll be asked to create your own password. On-screen prompts will explain what's needed. We will not have access to your password details so choose something memorable.



You will be asked to select and answer 2 security questions. These will only be used if you need to reset or change your password.

Logging On



Whenever we send you a file or a message, you'll receive an email notification from **NOTIFICATIONS@CLIENTSPACE.CO.UK** with a link to the log on page. This will only work if you have activated your account



When logging on, your email is the one that the notification was sent to. Your password was whatever you chose when you activated your log on.



To make things simpler, if we act for you in more than one role, you will only have a single log on to all your individual client portals.



Once you log on, you'll see a dashboard of all your outstanding messages, documents and approvals in each of your portals.