

**Overview**

Our new service, the Client Portal, offers you the ability to send documents to anyone within our organisation. You can safely send files of any size. There is no need to split one document into several individual files. You will receive confirmation for any documents that has been received. You can also access any documents that we have produced for you without the need of worrying about file size restrictions.

This user guide will take you through the steps on how to access the portal, send

**How do I access the Client Portal?**

You can use the following address within Internet Explorer to access the client portal – [portal.hwfisher.co.uk](http://portal.hwfisher.co.uk). The following screen will be displayed:

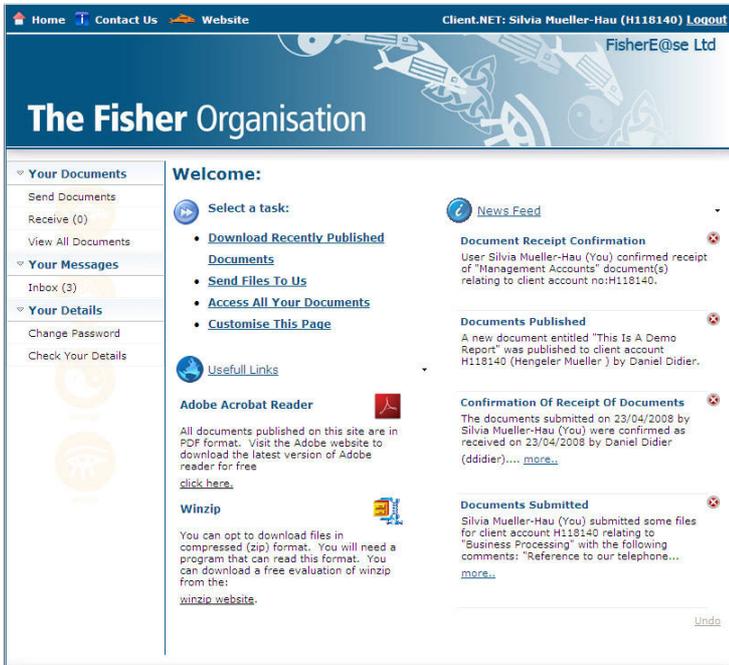


You will have already been issued with a user id and password. Enter these details into the appropriate areas of the screen. Click the [Log In](#) button.

## The Welcome Screen

The Welcome screen, similar to the image below, will be displayed where you can select one of the following tasks:

- Download recently published documents
- Send files to us
- Access all your documents
- Customising the page

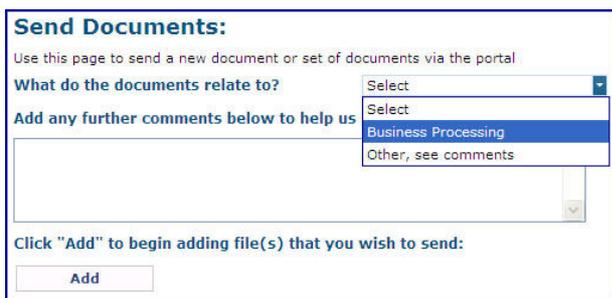


## How do I send a file through the client portal?

To start the task:

1. Click the link Send Files To Us

From the Send Documents screen select what the document relates to and add any further comments that will be of help in identifying the document.



2. Click [Add](#)

The portal will now allow you to add the necessary files that you wish to send. Follow the directions as outlined in the image below:

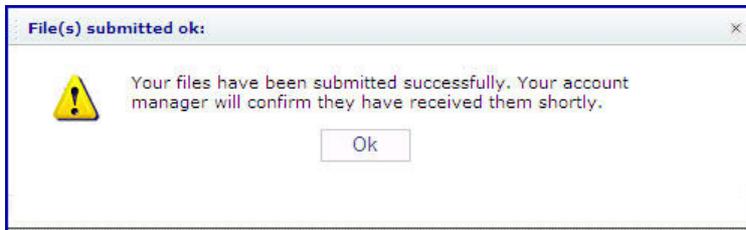


**i** Please note that you can only add a maximum of 5 files at a time to be sent through the

3. Click [Send Documents](#)



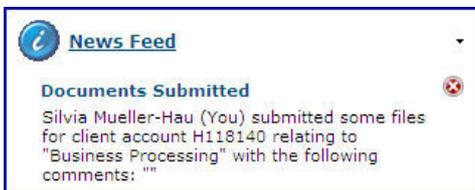
The [Files submitted](#) confirmation dialog will be displayed.



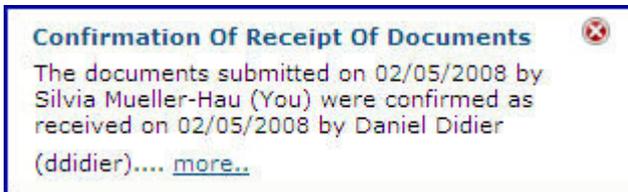
4. Click [OK](#) to continue

**How do I check that the document(s) have been received?**

Within the [News Feed](#) section on the [Home](#) page of the portal you will see the message that relates to the document that you have submitted (see image below).



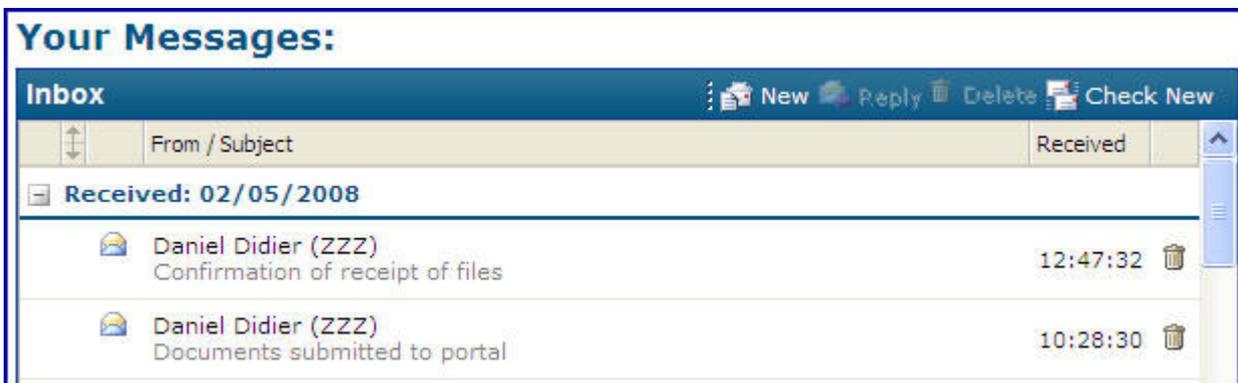
Once the account manager has processed the documents you will also receive notification on the Home screen of the portal similar to the image below:



You can also access messages from the [Your Message](#) section of the portal.

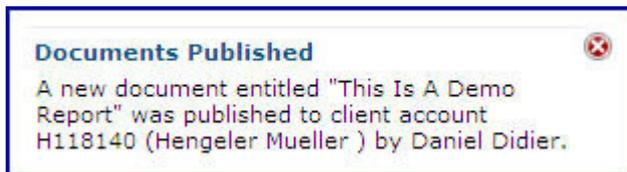


By selecting the inbox you will see what messages have been received in relation to documents that have been sent and received into the system (see image below).



## How do I access recently published documents from the portal?

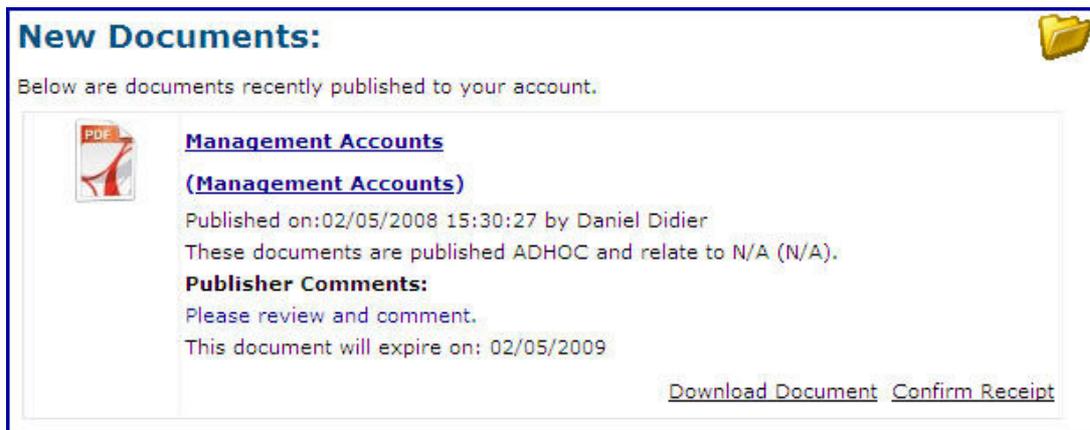
In the [News Feed](#) section of the portal you will be notified of any documents that have recently been published (see image below)



To access the published documents:

1. Click [Download Recently Published Documents](#)

You will be presented with a list of documents that have recently been published to your account.



2. Click [Download Document](#)

Follow the instructions within the screen to download a copy of the requested document.



-  All documents published within your account will be in a PDF format.

If you wish to confirm receipt of the document click on Confirm Receipt. The following will be displayed below your download screen view.



The document can be access again from the [Home](#) screen of the Client Portal from within the [My Documents](#) view.