The Fisher Organisation – Client Portal

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. The following screen will be displayed:

摿 Home 🧻 Contact Us	🔶 Website Client.NET: Lo	<u>qin</u>
The Fish	er Organisation	
creativity creativity enthusiasm energy energy vision	Client Login: Username: Password: Remember me next time. Log In Don't have a login? Click here to register. Forgotton your password? Click here to reset.	

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.

Use this page to send a new document or set of do	ocuments via the portal
What do the documents relate to?	Select
Add any further comments below to belo us	Select
Add any further comments below to help us	Business Processing
	Other, see comments
Click "Add" to begin adding file(s) that you	wish to send:

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:



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3. Click Send Documents

Click "Send Documents" to begin the file transfer:

Send Document(s) Cancel

The Files submitted confirmation dialog will be displayed.

	Your files have been submitted successfully. Your account	
<u>_</u>	manager will confirm they have received them shortly.	
	Ok	
	OK	

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).

News Feed	
Documents Submitted	۲
Silvia Mueller-Hau (You) submitted some files for client account H118140 relating to "Business Processing" with the following comments: ""	

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).

Your N	Messages:		
Inbox		👔 New 🧖 Reply 🏛 Delete 🚰 Check	New
¢	From / Subject	Received	>
🖃 Recei	ved: 02/05/2008		
	Daniel Didier (ZZZ) Confirmation of receipt of files	12:47:32	t
	Daniel Didier (ZZZ) Documents submitted to portal	10:28:30	Û

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)

Documents Published	۲
A new document entitled "This Is A Demo Report" was published to client account H118140 (Hengeler Mueller) by Daniel Didie	r.

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.

New Documents:	
Below are doo	cuments recently published to your account.
	Management Accounts (Management Accounts) Published on:02/05/2008 15:30:27 by Daniel Didier These documents are published ADHOC and relate to N/A (N/A). Publisher Comments: Please review and comment. This document will expire on: 02/05/2009
	Download Document Confirm Receipt

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.

Confirmation accepted (15:55). You can access the document again from the "my documents" section.

The document can be access again from the Home screen of the Client Portal from within the My Documents view.