How to Approveor Reject Documents

Guide to using OneClick as a signing portal



wrpartners.co.uk

Receiving notification

You will receive an email from notifications@accountantspace.co.uk to notify you that you have a document to approve.

You can click the link to go to our OneClick Portal or visit our website.

Logging in

When you first log into OneClick, you may have more than one account to enter. For example if you are a director of a Company, you will see your personal self assessment portal, and the companies portal.

Select which ever portal you want to enter to sign documents which will be stated on your email notification.

Approving and rejecting documents

The document approval facility within the Messages & Documents provides a secure and efficient way to obtain approval (or rejection) to documents instead of signing physically and returning through the post.

The main screen will show that you have an unread message. Click this to go to your documents.

Click the large orange number to go to your documents to approve.

When you click on the message, you must click the blue text to download, view the document to check you are happy with the figures.

Then tick the box and select approve or reject in the bottom right corner.

You then need to re-enter your password. Once approved, a notification will be sent to WR Partners. From: notifications@accountantspace.co.uk <notifications@accountantspace.co.uk> Sent: 14 September 2023 12:48 To: Client <Client@client.co.uk> Subject: You have a new message on your WR Partners portal Dear Client

There is a new message for you from WR Partners on your secure portal for Test.

Please click this link to log in and view the message.

If you are unsure what to do, please call your usual contact at WR Partners.

WR Partners | 08000 664 664 | <u>www.wrpartners.co.uk</u>

Protecting your future. Your leading firm of Accountants, Auditors, Business Advisers and Tax Specialists.

WR Partners Protecting your future.





| | 袋 Wi Par | ners OneClick test | * | oneclicktest@yopmail.com Logout |
|---|-------------|--------------------------------------|----------|------------------------------------|
| | > | OneClick test > Documents to approve | | |
| | ÷ | Documents to approve | | |
| | • | TEST TIFF for SCAN - Copy.pdf | | Pending |
| j | 5 | AP Incorporated.docx | | Pending |
| | ۰ | | | |

Approve Reject Download