

M+A Partners

- + Chartered Accountants
- + Tax Specialists
- + Business Advisers

How to use OneClick



M+A Partners has been helping clients to grow their businesses and achieve their ambitions for over a century - and we're immensely proud of our history.

We are a forward-looking firm with an emphasis on innovation, new technology and finding pioneering ways to give our clients the best possible service.

Our Norfolk-based firm is led by nine partners who are some of the most high-profile and well-respected experts in their fields locally, supported by a talented team of over a hundred staff.

We have a well-earned reputation for building excellent relationships with clients and the wider business community. That has always been, and continues to be, our number one priority.

OneClick is a cloud workspace tailored to your needs. Connect, communicate and collaborate in a secure way with us anytime, anywhere and on any device.



This user guide will help you start using your **OneClick** workspace.

Welcome to **OneClick** user guide

CCH **OneClick** activation

To activate your CCH **OneClick** account, you will receive an activation email from **notifications@accountantspace.co.uk**

Click the link in the email and follow the on-screen instructions:

1. Create a password;
 2. Set up your Multi-Factor Authentication (MFA) method;
 3. Save the recovery codes when prompted for future use; and then
 4. Log-in to your new **OneClick** workspace using your email address, password and MFA.
-

Using your **OneClick** workspace

Using the latest, secure encryption standards, **OneClick** allows M+A Partners to communicate safely with you. We can exchange files securely and you can approve documents securely.

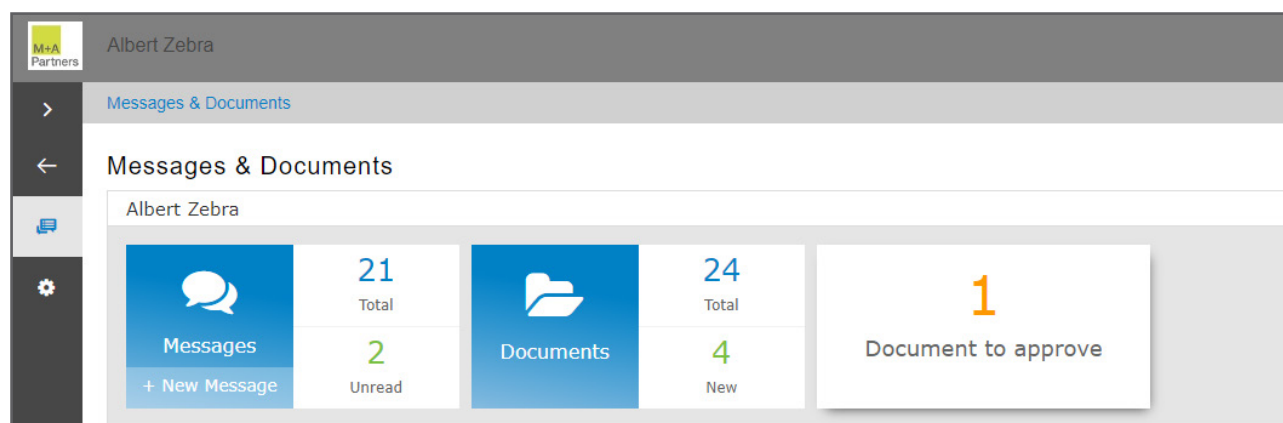
When you log-in to your **OneClick** workspace, you will see Messages and Documents displayed on your home screen.

Messages and Documents

Messages and Documents is the functionality within **OneClick** that allows you to exchange messages, files and information online. It is accessed through your client workspace within **OneClick**.

From the home page you can see a summary of each account you have access to. If you are an associated contact of multiple businesses you will be able to see them all here.

Once an account is selected you will see the screen below. Messages contains your messages and documents, whereas Documents contains only your documents so they are easily accessible without the need to review the accompanying message.



Messages

The Messages tile will take you to the conversations for that account. There is an indicator showing the number of messages you have and how many are unread.

You will be sent an email notification from **notifications@accountantspace.co.uk** when you receive a new message within **OneClick**.

Sending information to the team at M+A Partners

1. Select the + button to create and send a new message;
2. The system will automatically bring up a list of your team at M+A Partners for you to choose from;
3. Select the 'Add file' button or use the drag and drop facility to upload documents to the message.

The screenshot shows the 'New Message' interface for Albert Zebra. The interface includes a sidebar with navigation icons, a header with the user's name and a breadcrumb trail, and a main form area. The form has fields for 'From', 'To', 'CC', and 'Subject'. The 'To' field is populated with a list of team members. There are buttons for 'Add file', 'Cancel', and 'Send'. A dashed box indicates a drag-and-drop area for files. The bottom section contains a rich text editor with various formatting options.

Albert Zebra

Albert Zebra > Messages > New Message

New Message

Add file Cancel Send

From
Albert Zebra

* To
Select client team contact(s)

✓ Select All × Deselect All

CC
Select other contact(s)

* Subject

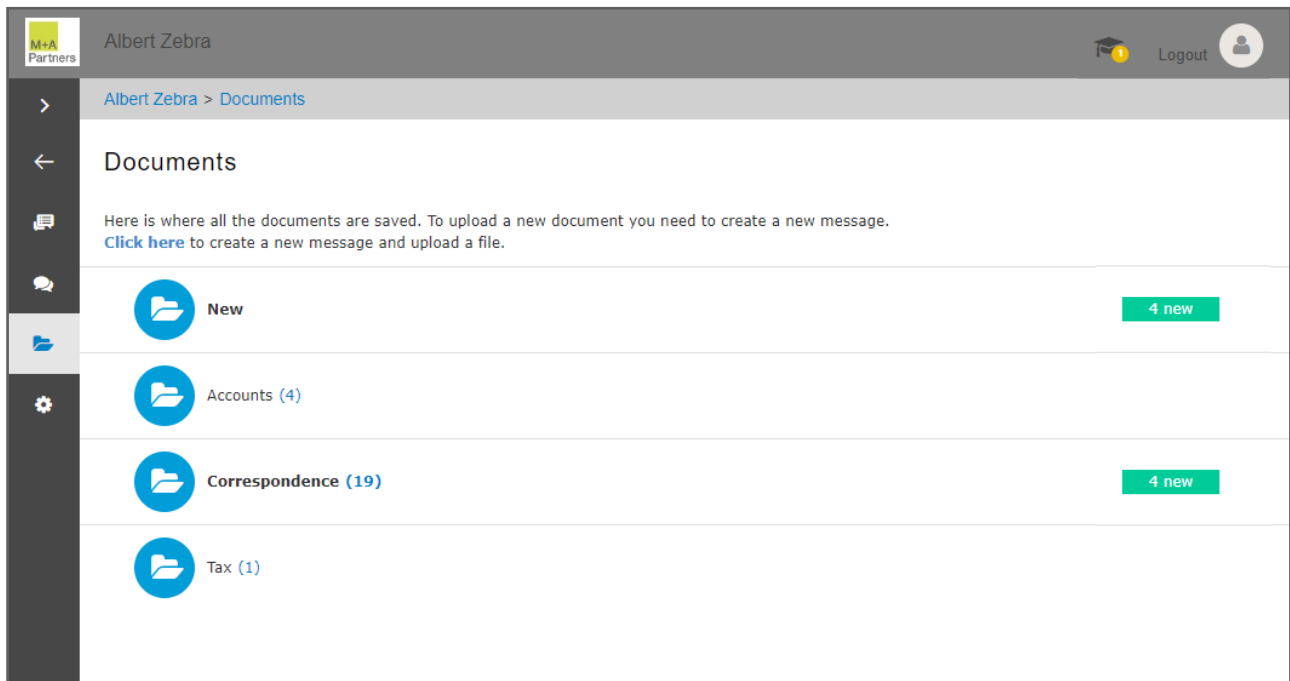
Drag and drop files and folders here or [click here](#) to open your file browser. A maximum number of 20 files can be attached.

* Message

Verdana 12px B I U A

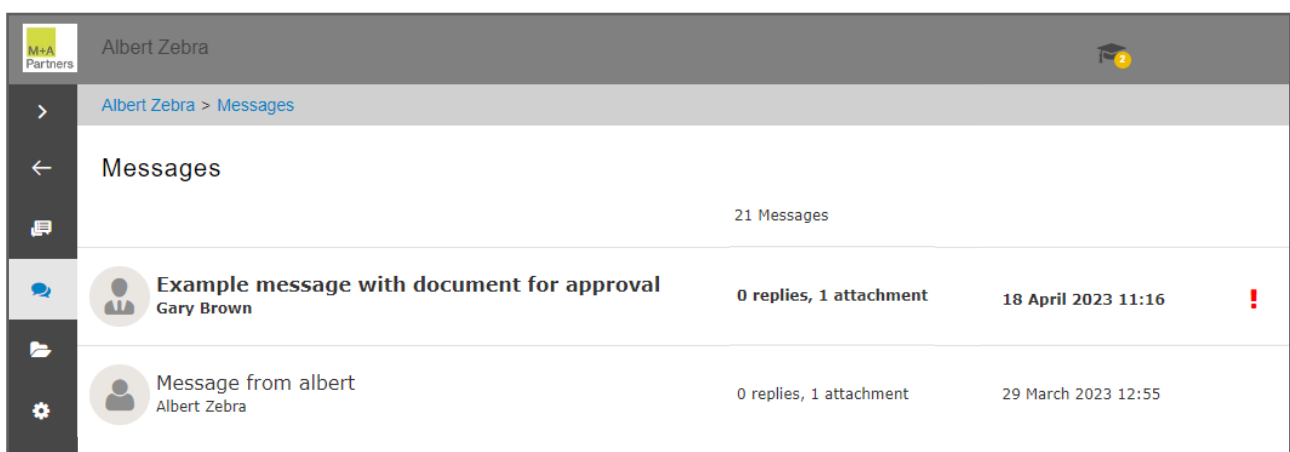
Documents

1. The Documents tile will take you to all the documents available for that account, including those previously shared through **OneClick**; then
2. Select the New folder to view the documents that have been received and not yet reviewed.

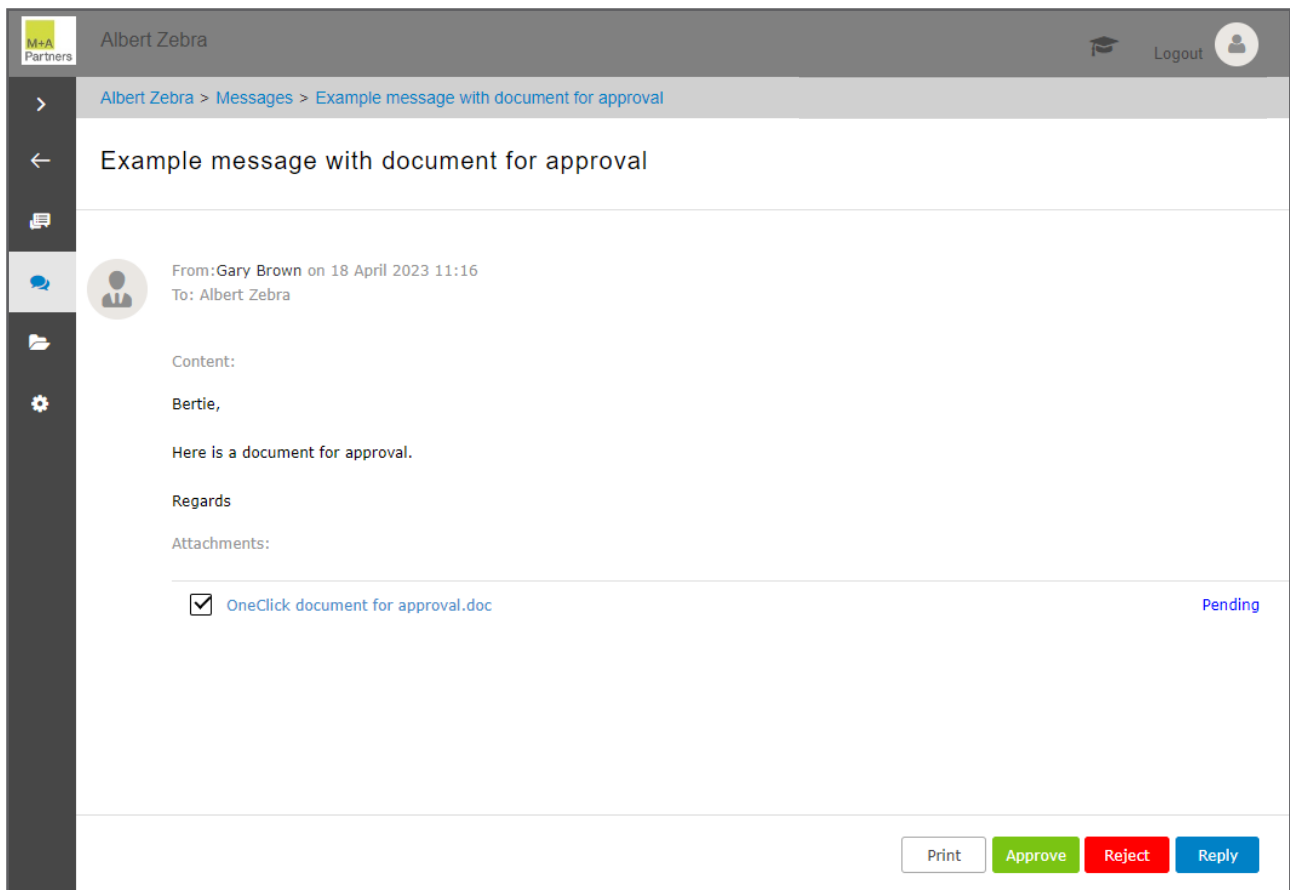


Documents needing approval

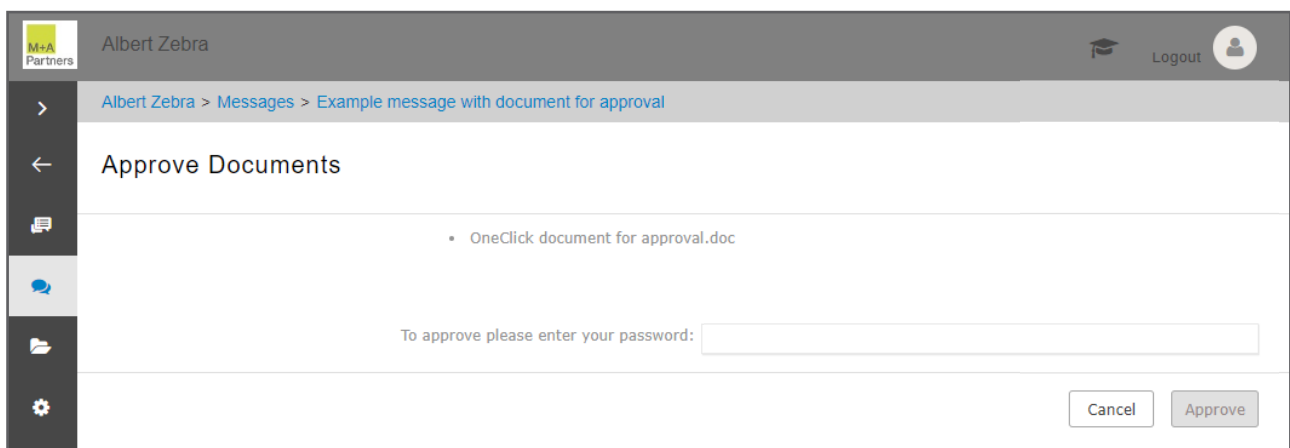
The exclamation mark signals that there is a document needing your approval.



1. Click on the document needing approval;
2. You will see the message from the team at M+A Partners asking you to approve or reject the document;
3. You will need to tick the check box for the document you are approving;



4. This will then give you the option to Print, Approve, Reject or Reply. You will have to view the document before it can be approved;
5. Once you have reviewed the document, select which option you'd like to choose;
6. If approving the document, you will need to enter your **OneClick** password.



Message alerts

You will receive an email from **reminders@accountantspace.co.uk** if you have been sent a document to approve and you haven't responded. This is an automated service, please do not reply directly to these messages.

If you have any questions or difficulties using your **OneClick** workspace and would like further assistance, please speak to your usual contact at M+A Partners.

MA Partners LLP

7 The Close Norwich Norfolk NR1 4DJ

☎ 01603 227600

MA Partners LLP

2 Cyprus Court Queens Square Attleborough Norfolk NR17 2AE

☎ 01953 452077

MA Partners LLP

12 Church Street Cromer Norfolk NR27 9ER

☎ 01263 513971

✉ enquiries@mapartners.co.uk

mapartners.co.uk



mapartnersuk

Disclaimer We believe the information herein to be correct at the time of going to press, but we cannot accept any responsibility for any loss occasioned to any person as a result of action or refraining from action as a result of any item herein. **April 2023** Printed and published by © MA Partners LLP. M+A Partners is the trading name of MA Partners LLP and MA Partners Audit LLP, which are limited liability partnerships. A list of members may be inspected at our registered office: 7 The Close, Norwich, NR1 4DJ. The term "partner" is used to refer to a member of MA Partners LLP or MA Partners Audit LLP. MA Partners LLP is regulated for a range of investment business activities and licensed to carry out the reserved legal activity of non-contentious probate in England and Wales by the Institute of Chartered Accountants in England and Wales. MA Partners LLP is registered in England and Wales (LLP number OC 361855). MA Partners Audit LLP is registered to carry on audit work in the UK and Ireland by the Institute of Chartered Accountants in England and Wales. MA Partners Audit LLP is registered in England and Wales (LLP number OC 427003).