



Welcome to our OneClick user guide

What is OneClick?

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.

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.

The screenshot displays the CCH OneClick workspace interface for Albert Zebra. The top header shows the user's name and the M+A Partners logo. Below this is a navigation bar with a right arrow and the text 'Messages & Documents'. The main content area is titled 'Messages & Documents' and shows a summary for Albert Zebra. It features three summary cards: 'Messages' with 21 Total and 2 Unread, 'Documents' with 24 Total and 4 New, and a 'Document to approve' card with 1 document. A '+ New Message' button is located at the bottom left of the Messages card.

Category	Total	New/Unread
Messages	21	2 Unread
Documents	24	4 New
Document to approve	1	

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**.

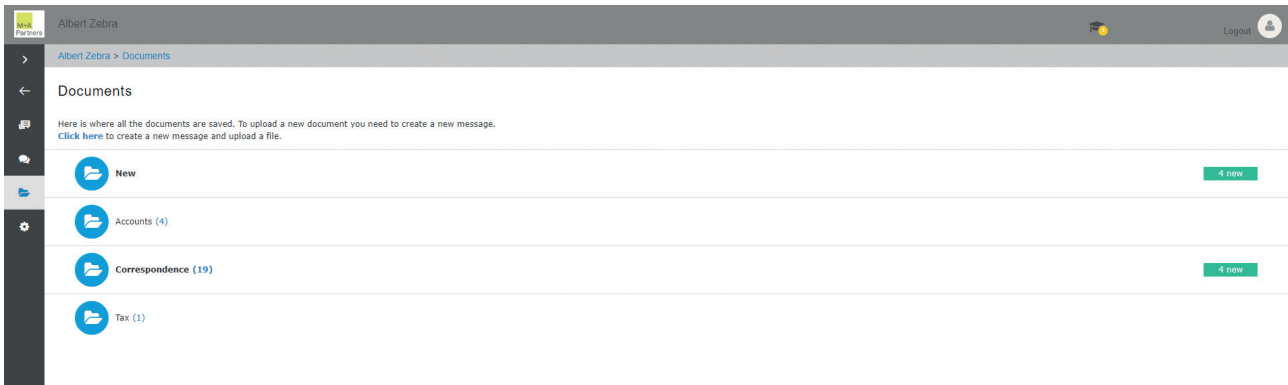
Sending information to the team at M+A Partners

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 header with the user's name and a breadcrumb trail: 'Albert Zebra > Messages > New Message'. Below the header, there are three buttons: 'Add file', 'Cancel', and 'Send'. The main form area contains several fields: 'From' (Albert Zebra), '* To' (a dropdown menu for selecting client team contacts with 'Select All' and 'Deselect All' buttons), 'CC' (a dropdown menu for selecting other contacts), and '* Subject' (a text input field). Below these fields is a dashed box for file uploads with the text: 'Drag and drop files and folders here or [click here](#) to open your file browser. A maximum number of 20 files can be attached.' At the bottom, there is a '* Message' section with a rich text editor toolbar containing options for font (Verdana), size (12px), bold (B), italic (I), underline (U), text color (A), background color (A), bulleted list, numbered list, decrease indent, increase indent, link, and unlink.

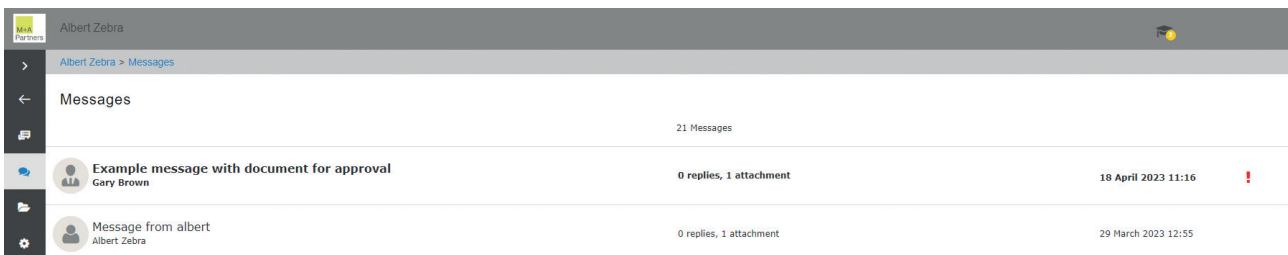
Documents

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.

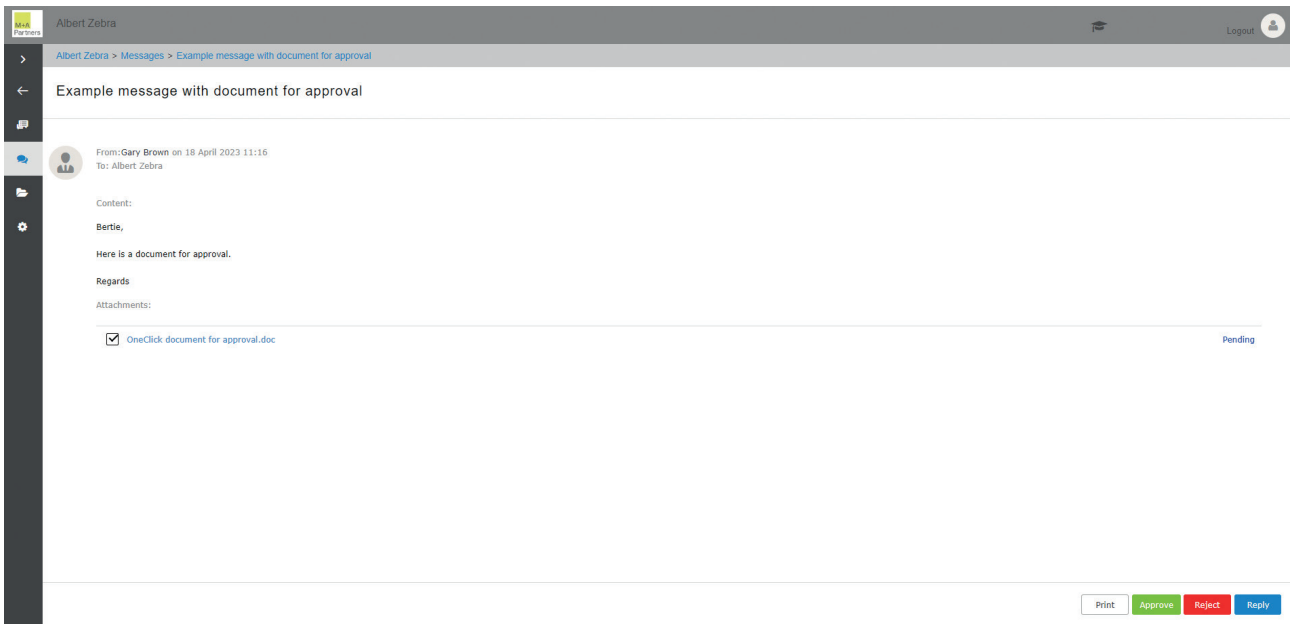


Documents needing approval

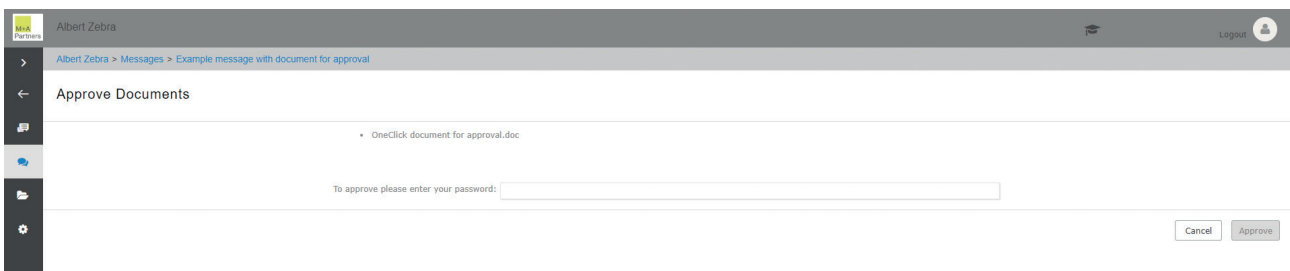
The exclamation mark signals that there is a document needing your approval.



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.

How M+A Partners can help

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**.



Partners

Our Vision - to be the firm of choice,
through our team fulfilling their potential
and delivering exceptional client service

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