![MOORE]

HOW TO USE ONECLICK

WELCOME TO ONECLICK FROM MOORE SOUTH

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 – but if you have any questions or difficulties, please contact your usual Moore South adviser.

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 & follow the on screen instructions:

  - Create a password

  - Set up your Multi Factor Authentication (MFA) method

  - Save the recovery codes when prompted for future use.
  - Log into your new OneClick workspace using your email address, password & verification code (MFA).

USING YOUR ONECLICK WORKSPACE

Using the latest, secure encryption standards, OneClick allows Moore South to communicate safely with you. We can exchange files securely and you can approve documents securely.

When you log into your OneClick workspace, you will see Messages and Documents displayed on your home screen.

MESSAGES & 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.
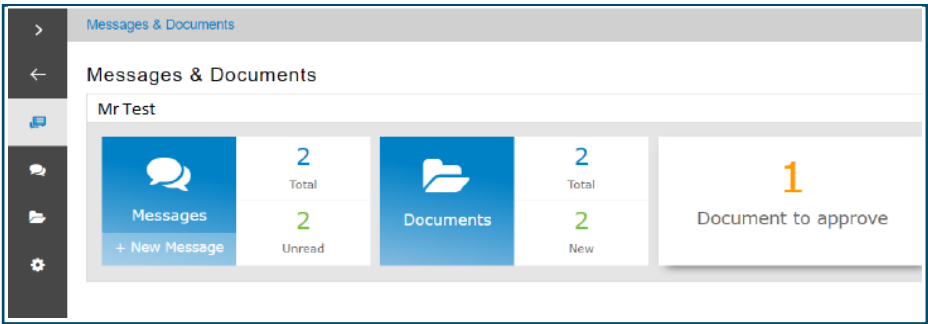
MESSAGES

The Messages tile will take you to the conversations for that account. There is also an indicator here of how many 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 MESSAGES TO THE TEAM AT MOORE SOUTH

- Select the + button to create and send a new message
- The system will automatically bring up a list of your team at Moore South for you to chose from.
- Select the 'Add Files' button or use the drag and drop facility to upload documents to the message.
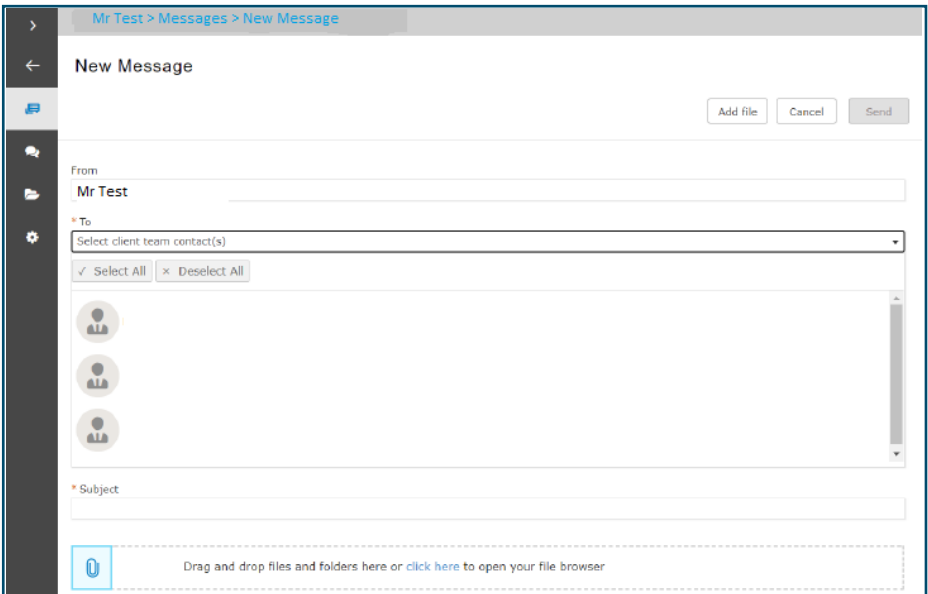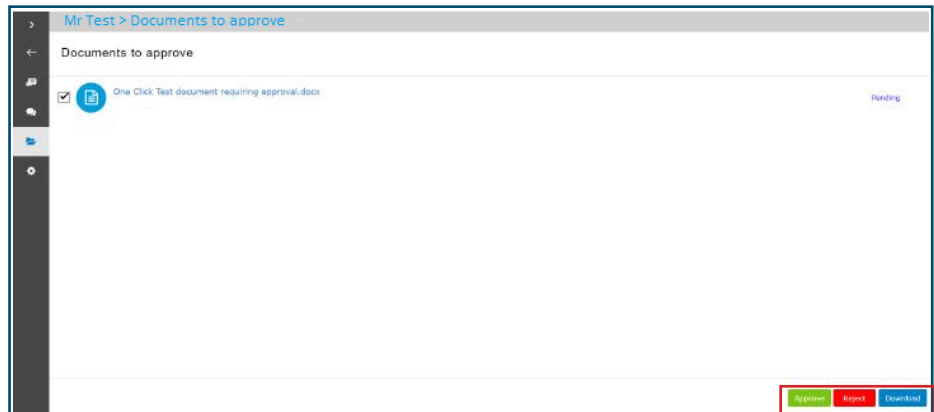
DOCUMENTS

The documents tile will take you to all the documents available for that particular account.

Select the new folder to view all the latest documents that have been received and not yet reviewed.
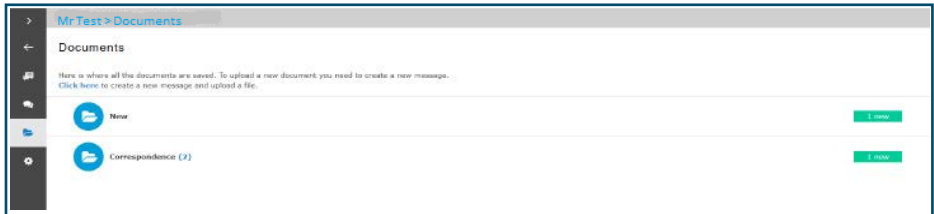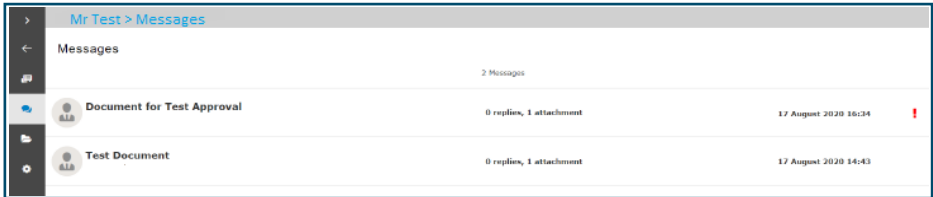

Any documents needing your approval will be shown here. ***Tick the check box*** and select Approve or Reject.

You will need to enter your password to confirm your decision.

DOCUMENTS NEEDING APPROVAL

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


Click on the document needing approval. You will see the message from the team at Moore South asking you to approve or reject the document. You will need to **tick the check box** for the document you are approving.
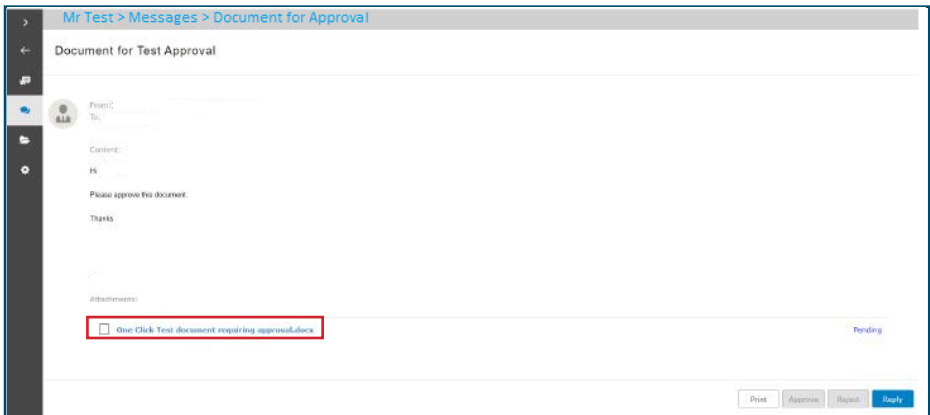
This will then give you the option to Print, Approve, Reject or Reply. You will have to view the document before it can be approved.

Once you have reviewed the document, select which option you'd like to choose. If approving the document, you will need to enter your OneClick password.
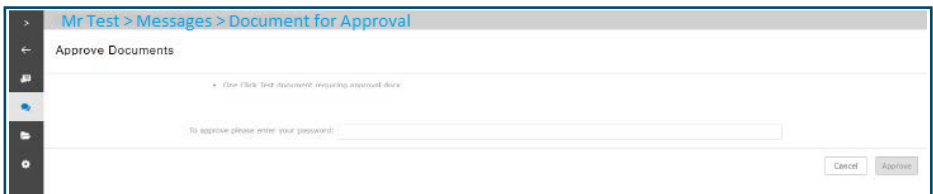
MESSAGE ALERTS

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.

GET IN TOUCH

If you would like further guidance on OneClick please contact the relevant Moore South office:

Chichester
T: 01243 531 600
E: chichester@mooresouth.co.uk

Salisbury
T: 01722 335 182
E: salisbury@mooresouth.co.uk

Guildford
T: 01483 538 881
E: guildford@mooresouth.co.uk

Southampton
T: 02380 330 116
E: southampton@mooresouth.co.uk

Isle of Wight
T: 01983 825 000
E: newport@mooresouth.co.uk

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