

# OneClick Client Portal User Guide

How to use your OneClick portal

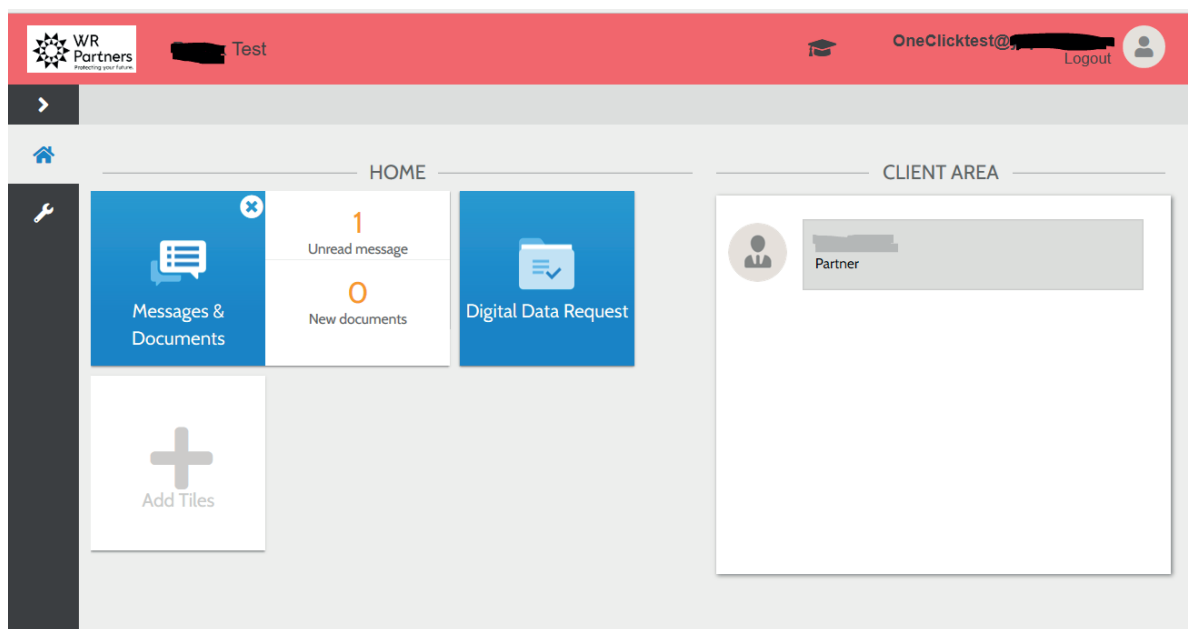
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# OneClick portal

When entering your OneClick portal, the OneClick dashboard will be presented and you can begin to use your OneClick workspace.



## Messages & documents

Allows you to view and send messages and documents to us from a secure environment. If there are any unread messages or new documents received, the counters are shown on the Messages & Documents tile.

## Digital data request

This is where you will add your self-assessment figures for the current year if applicable.

## Client team

The Client Team section on the right-hand side of the dashboard shows details about the team who manages your assignment within the practice.

## Displaying messages

In Messages & Documents, messages are grouped into conversations. All messages, including the first welcome message, can be seen in the Message list, in chronological order from the most recent to the oldest. Where messages are unread, the row will be in a larger font and bold. When the message is opened, the message is treated as read and font style turns regular. The message status reverts to 'unread' when further replies are added to that conversation.

There is also a summary column to show how many replies and attachments this conversation has, useful for an overview. By clicking on a message, it will take you to the content (conversation) of that message in its own screen. The conversation chain shows the newest message first and the oldest last.

## Viewing documents

Documents sent via Messages & Documents can be accessed in three places:

- By clicking the hyperlink in the Conversation view.
- In the Documents page under the folders.
- In the New folder.

