2013

BWM
online

BWMacfarlane LLP
CHARTERED ACCOUNTANTS

Secure document exchange

A guide for clients

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Saving time

Posting documents to clients for review can be slow. Emailing documents is certainly quicker and cheaper, but there are significant security issues, especially when sending personal information Additionally with the adoption of the European General Data Protection Regulation from 2014 data protection will be required to be set at a high level not currently afforded by email.

Secure

Our secure document exchange portal, operated though IRIS OpenSpace, addresses these concerns. It enables BWMacfarlane to exchange documents with our clients in a secure environment. It is 'cloud' based meaning there is no software to install.

Electronic approval functionality

e-Approval means that clients can approve any PDF document within minutes. Having received an alert indicating a document is awaiting your approval, you can view and approve the document – no printing or scanning involved! A notification is then received at BWMacfarlane once the document has been approved.

Easy to use

The registration and approval process is very straightforward, you will simply receive the emails shown in the examples on the next pages. You can also upload documents to share with us, saving you time and money too.

"The electronic approval functionality in IRIS OpenSpace is very easy to use and clients understand it straight away. They just log in to review the document and then simply click to approve. The turnaround time for client tax returns has changed dramatically and what used to take a week or longer now can take five minutes or even less."

Step 1. Activating your account

We will create an account for you and you will receive this email for activation

From: noreply@irisopenspace.co.uk <noreply@irisopenspace.co.uk>
Date: Fri, Feb 15, 2013 at 12:07 PM
Subject: IRIS OpenSpace Client Registration
To: John Smith<Johnsmith@emailaddress.co.uk>

Activate Your IRIS OpenSpace Account

Dear John,

Your accountant at BWM has created an account for you on IRIS OpenSpace so that you can exchange documents instantly and securely. To activate your account please click https://www.irisopenspace.co.uk/account/confirm/50d47cc2-572e and create a password.

If you have any questions regarding IRIS OpenSpace please contact your accountant at Iris SG.

Please note that your use of IRIS OpenSpace is governed by the terms and conditions, details are available here:
https://www.irisopenspace.co.uk/Home/TermsAndConditions.

www.iris.co.uk/accountants

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Step 2. Your log on details

Following activation you will then receive this email with your personal log on details

Welcome to IRIS OpenSpace

Dear John

Thank you for activating your account.

Here are the details to allow your to login to IRIS OpenSpace:

The web address for login is: https://www.irisopenspace.co.uk
Your login email registered is: Johnsmith@emailaddress.co.uk

If you forget your password then you can reset it via the login screen on the website or click:
https://www.irisopenspace.co.uk/Account/PasswordReset

We'd love to hear what you think of IRIS OpenSpace so please do send us your feedback!
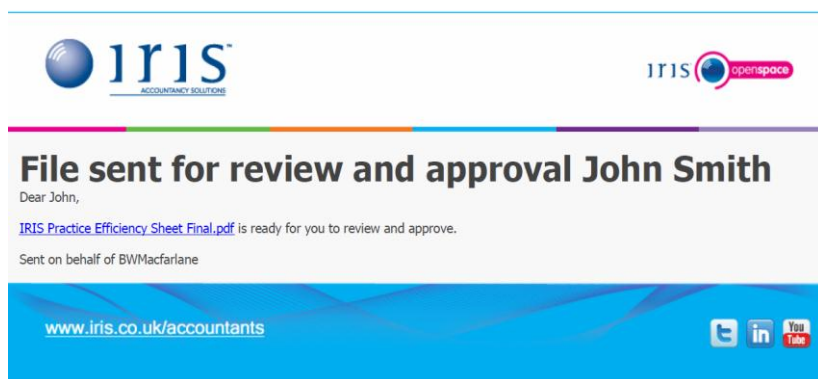
www.iris.co.uk/accountants

Step 3. Document review / approval

When we have a document ready for you to review and/or approve you will receive this email notification and simply need to follow the link and on screen instructions

From: **noreply@irisopenspace.co.uk** <noreply@irisopenspace.co.uk>
Date: Fri, Feb 15, 2013 at 12:29 PM
Subject: IRIS OpenSpace Document Ready for Approval
To: John Smith<Johnsmith@emailaddress.co.uk>

File sent for review and approval John Smith

Dear John,

IRIS Practice Efficiency Sheet Final.pdf is ready for you to review and approve.

Sent on behalf of BWMacfarlane

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Step 4. Client document upload facility

If you have a document you wish to send to us you can simply upload this after logging on and we will automatically receive a notification email to access the document

From: **noreply@irisopenspace.co.uk** <noreply@irisopenspace.co.uk>
Date: Fri, Feb 15, 2013 at 12:10 PM
Subject: IRIS OpenSpace File Added
To: BWMacfarlane

New File Added by John Smith (JS101)

Dear BWMacfarlane

A file has been added or changed in IRIS OpenSpace. Click the link below to go to IRIS OpenSpace.

Any client document.pdf was added by John Smith (JS101)

www.iris.co.uk/accountants

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