

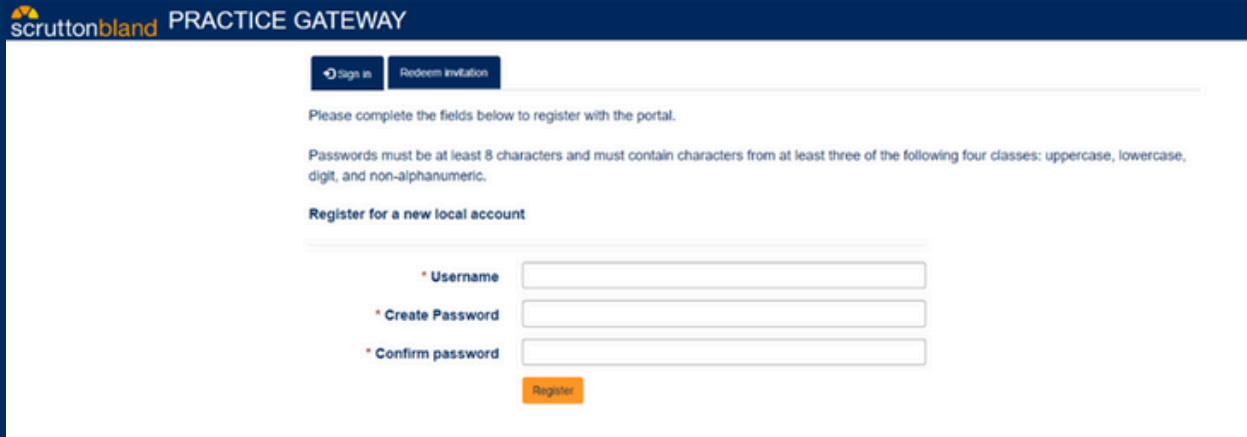
SCRUTTON BLAND PORTAL

A USER GUIDE TO OUR ONLINE PORTAL



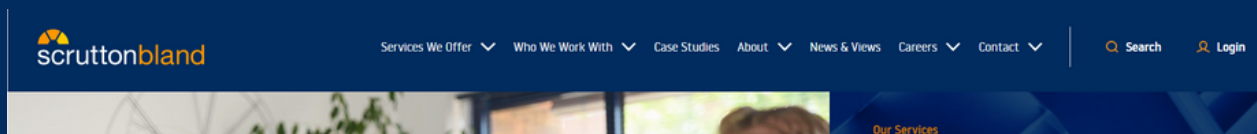
Registering

The first time you access the Practice Gateway Portal, you will receive an email from Scrutton Bland with a link to join the portal. Once you click on this link you will be presented with the screen below to set your username and password.



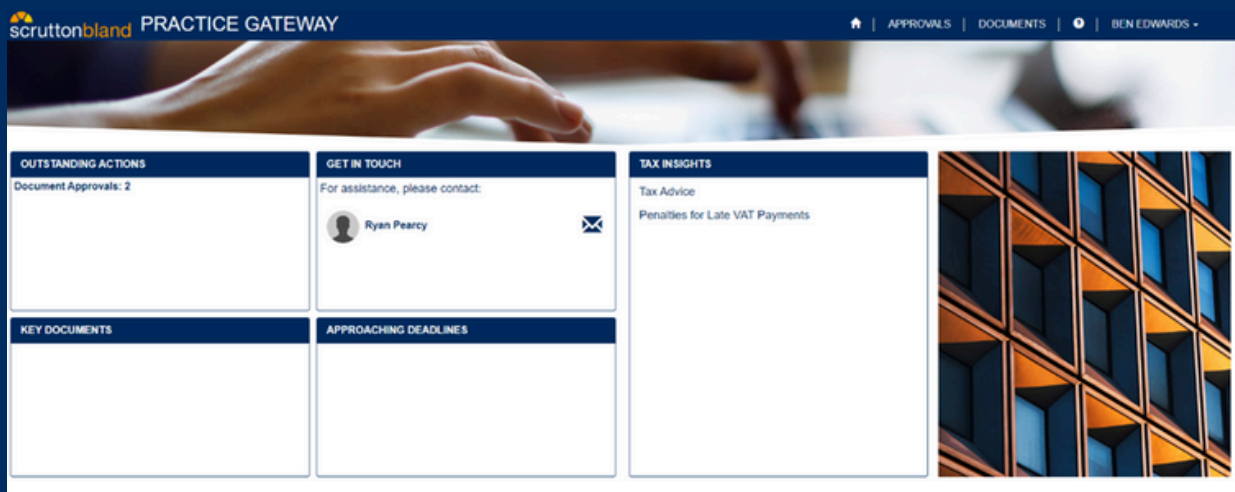
The screenshot shows the registration page for the Practice Gateway. At the top left is the Scrutton Bland logo and the text "PRACTICE GATEWAY". Below this are two buttons: "Sign in" and "Redeem invitation". A message states: "Please complete the fields below to register with the portal." Below this is a password requirement note: "Passwords must be at least 8 characters and must contain characters from at least three of the following four classes: uppercase, lowercase, digit, and non-alphanumeric." The section "Register for a new local account" contains three input fields: "Username", "Create Password", and "Confirm password". A "Register" button is located at the bottom right of the form.

Please note: we would suggest you save the portal link as a shortcut or favourite on your internet browser. However, you will be able to access from the Scrutton Bland website using the Login button at the top right of the homepage.



Documents and Approvals

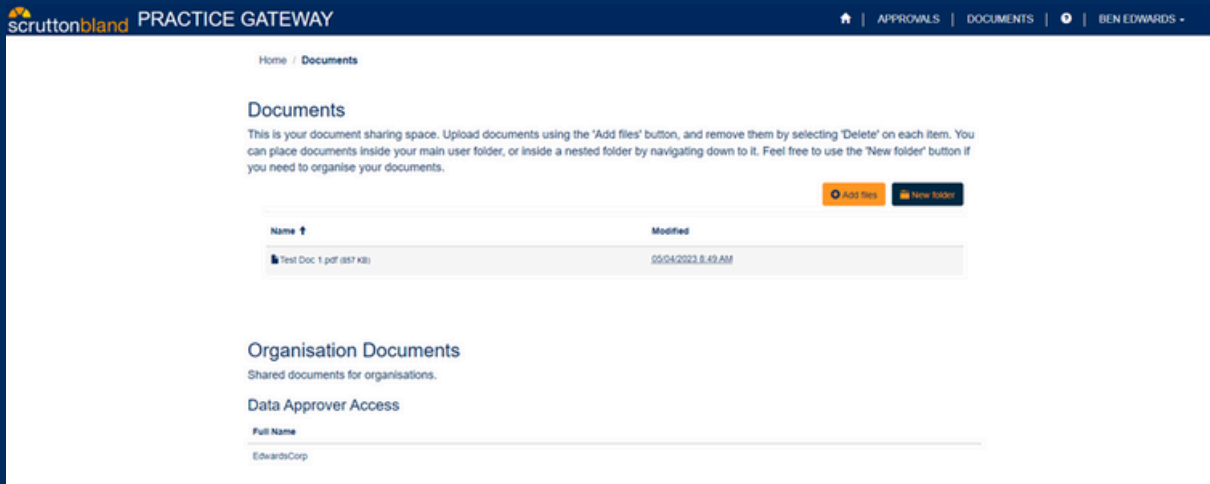
Once you have registered you will be presented with a screen similar to the below and by clicking on "Approvals" or "Documents" in the top right you will be taken to the relevant section. The question mark icon can also be used to see answers to frequently asked questions.



The screenshot shows the dashboard of the Practice Gateway. At the top left is the Scrutton Bland logo and the text "PRACTICE GATEWAY". On the top right, there is a navigation bar with a home icon, "APPROVALS", "DOCUMENTS", a question mark icon, and the user name "BEN EDWARDS". The dashboard is divided into several sections: "OUTSTANDING ACTIONS" (Document Approvals: 2), "GET IN TOUCH" (For assistance, please contact: Ryan Pearcy), "TAX INSIGHTS" (Tax Advice, Penalties for Late VAT Payments), "KEY DOCUMENTS", and "APPROACHING DEADLINES". A large image of a modern building facade is visible on the right side of the dashboard.

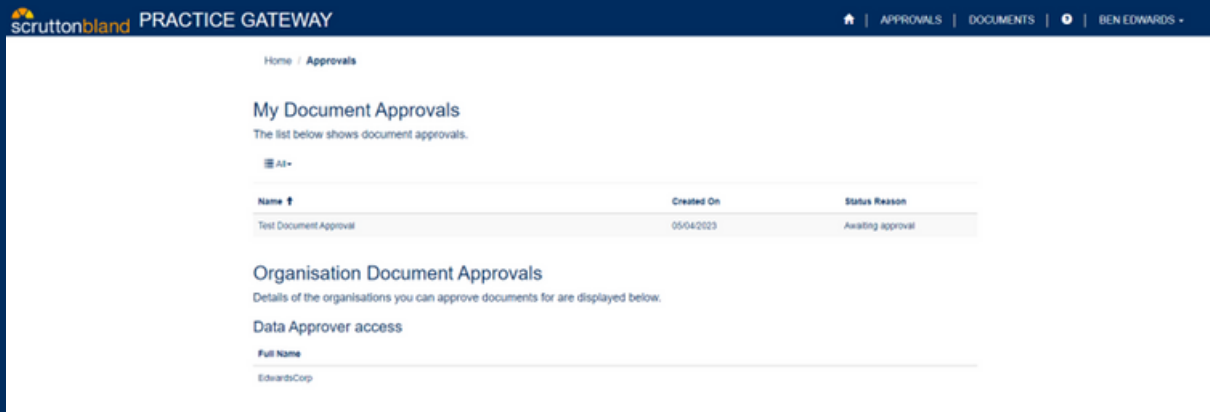
Documents

In the documents section you will be able to see your own documents and any which have been sent to the entire organisation(s) you are associated with.

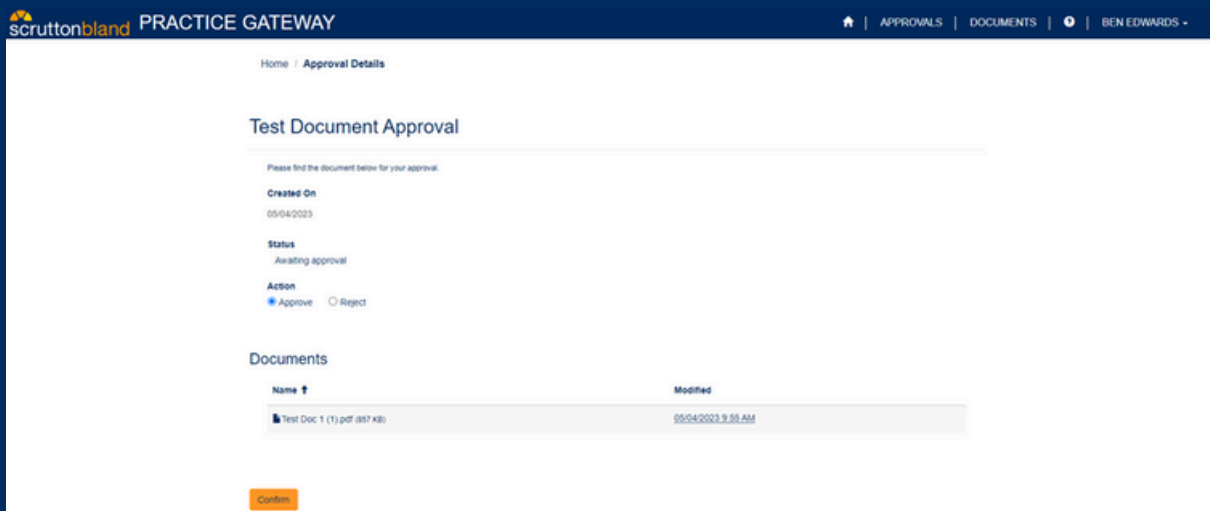


Approvals

In the approvals section you will be able to see your own approvals and any which have been sent to the entire organisation(s) you are associated with.



If you click a document approval you will see a screen similar to the below where you can click approve or reject and then confirm.



FAQ'S

Q. What do I do if I have forgotten my password?

A. If you go to the login screen there is a “Forgot your password?” button. Select this and it will trigger the password reset process.

Q. I have triggered the password reset but can still not login.

A. It is likely that the username you are entering does not match what is stored. To get this reset please contact your account manager at Scrutton Bland. When setting your username we advise setting it as your email address.

Q. I am not receiving the verification code

A. This can take up to 2 minutes to get to you via email. It will be sent to the email address we have logged for you in our system, but may be getting filtered into your junk folder. Please check this and if so mark this email address as “trusted”, which will resolve the problem moving forward. If you are still not receiving it, please reach out to your account manager at Scrutton Bland to check we have the correct email listed in the system.

Q. The verification code is not working

A. In the email you receive there is a 6 digit code as well as a CRM number. Please ensure you are using the 6 digit code. If you have triggered the code twice and both times it has not worked please reach out to your account manager at Scrutton Bland.

Q. I am receiving an error message when trying to log in

A. This can sometimes occur when there has been a transmission issue from your web browser. Please start the login process again and it should resolve itself. If you receive a similar error, please send a screenshot of this to your account manager at Scrutton Bland.

Q. I cannot find the documents for approval / signature

A. The portal allows you to see personal documents as well as any businesses you are associated with. If you select “Approvals” at the top you be navigated to your personal area with your associated businesses in banners under “shared approvals access”. Each of these is sub-divided into departments which are shown on the left. Please navigate to the relevant business and department that the approval should have come from. You should then find both approved and those awaiting approval/signature in there. If you cannot locate the document please reach out to your account manager at Scrutton Bland.

The screenshot displays the 'PRACTICE GATEWAY' interface. At the top right, there are navigation links for 'APPROVALS' and 'DOCUMENTS'. The main content area is titled 'Home / Approvals' and features a section for 'Shared Approvals Access'. Below this, a banner identifies the 'PG Test Organisation'. The 'My Approvals' section is active, showing a list of folders: 'General', 'Business Advisory', and 'Digital'. The 'General' folder is selected, displaying a table of 'Approved' documents. The table has columns for 'Name' and 'Created On'. One document is listed: 'Single doc contact sign - Signed', created on '27/09/2023 1:08 PM'.

Name	Created On
Single doc contact sign - Signed	27/09/2023 1:08 PM

This is an initial guide, the near future, further functionality will be rolled out and this guide will be expanded.

We will also be adding this guide, along with any future guides in your 'documents' section of the portal.

You can access the portal at any time by [clicking this link](#).

If you have any questions or need any help using the portal, please contact hello@scruttonbland.co.uk.

