## **DVM Client Portal Guide:**

## Completing an e-sign request from DVM via the client portal

1. You will receive an email asking you to sign a document:

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1	Home View Help							
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		Your browser supports setting Outlook.com as the default email handler Try it now Ask again later Don't show again						
	✓ Folders	× Close Previous Next		z.,				
	🖂 Inbox 49268	E-Sign Request: How to Attract Win New Customers Handout						
88	🔀 Junk Email 193		662.					
Ø	🔊 Drafts 3	I Jennier Leonard	Wed 05/07/2023 11:	7				
	> Sent Items	Dear Jenny,						
-	🗊 Deleted Ite 2	We have uploaded a document (How to Attract Win New Customers Handout) to your portal. Please sign in here to e-sign the document.						
_	Archive	EXTRA DETAIL EDITED IN QUEUE - BLAH BLAH						
×	Notes	Jennifer Leonard BSc Econ ACA						
•	P <sup>-1</sup> Conversation	Director						
•	ra w	1 am currently working part-time. If your enquiry is urgent please email info@dm.co.uk or phone the affice on the number below.						
	Create new fol	DV Marlow & Co						
	create new rollin	Chartered Accountants, Registered Auditors.						
	Groups	72 West Street, Portchester, Fareham, PO16 9UN.						
		T: 023 9220 0270. F: 023 9221 5002. W: http://www.dvm.co.uk						
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2. Please click the link in the email to login to our client portal (if you haven't yet registered, ask us for a new unique link. If you have forgotten your password, you can click 'forgot password' at the bottom of the login screen.), Next, click on the red 'view and sign' icon.

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		Welcome lenny	
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		Important Information	
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		Thank you for registering for our client portal. The different areas of the portal can be used as follows:	
		My Info - update your personal / business details here.	
		Document Portal - upload documents for us, and view, download and approve documents that we have uploaded for you.	
		Deadlines - view the services that we are providing, and any deadlines that apply.	
		Tax Liabilities - view your tax information and any payments due.	
		Settings – update your password here.	

- 3. Clicking the red icon opens the document for you to view and sign.
  - > Firstly, please tick 'I agree and sign off on the above document';
  - > Secondly, please add your signature. You can either:
    - $\checkmark$  type your signature (top icon with keyboard image);
    - ✓ draw your signature (middle icon with pencil);
    - $\checkmark$  upload your signature as a file (bottom icon with arrow).

Method	I agree and sign off on the above document   PRINT NAME HERE	
±	Sign Document	

Your DVM Client Manager will then be automatically notified that you have approved the document, and we will proceed with the next step in the process (usually filing a return online with HMRC).

You will also receive a confirmation email that the document has been signed.

Thank you for using the client portal.