

CLIENT PORTAL SET-UP

Step 1 – You will receive an email from notifications@accountantspace.co.uk

Step 2 – Click the link and setup password, enter the captcha code. Configure MFA. Choose an MFA type, configure it, receive a code by that method. Enter that code to confirm the MFA setup.

Step 3 – Save the recovery codes somewhere safe. If you have more than 1 account (personal & company) choose one on the organisation selection screen.

Step 4 – Receive a code by your MFA method. You're now logged in.

Step 5 – Please read and agree the Terms & Conditions

Step 6 – When you login you will see yourself and/or any businesses various Swim lanes for the companies you are allocated to.

- Passwords to be a min. of 8 characters and must include uppercase letters, lowercase letters, numbers & symbols
- You can switch between different swim lanes using 'switch account' at the top left
- The login preferences tile allows management of passwords, recovery codes and MFA options
- It's recommended to set up a 2nd MFA option as a backup

Full details of our Privacy Policy can be found on our website [HERE](#)

If you require any further information or assistance, please contact your usual Advisor.