CCH OneClick

Practice Activation & Client Setup

Wolters Kluwer

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1. Using this Guide

This guide is designed to prepare you for the introduction of CCH OneClick to your practice, and describes the steps you need to undertake to get up and running. It assumes that you are familiar with the Microsoft Windows environment, and can perform basic tasks within CCH Central

There are 3 steps to the CCH OneClick setup

Practice Activation | Employee Activation | Client Activation

2. Practice Activation

- Once you have requested that CCH OneClick be added to your licence, you will receive an email guiding you through the installation and activation process.
- You will be directed to an activation page where you can activate your practice's CCH OneClick workspace.

Please note that the activation must be completed by your designated administrator for CCH OneClick

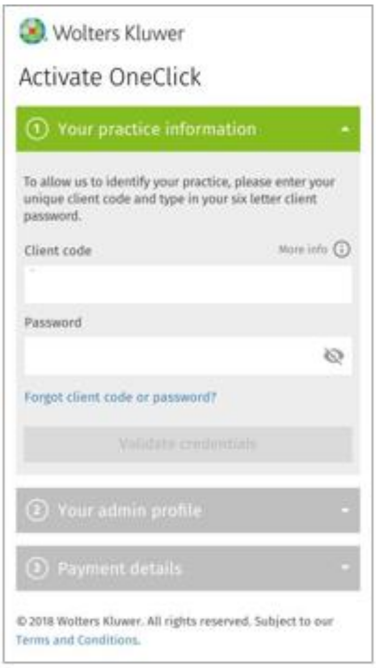
The email address used must <u>NOT</u> be the same as an email address used in CCH Central by an employee that you wish to activate for CCH OneClick - If your OneClick administrator will also be a user of CCH OneClick, 2 different email addresses will be required

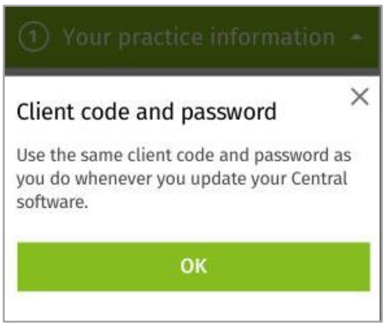
2.1 Online Activation

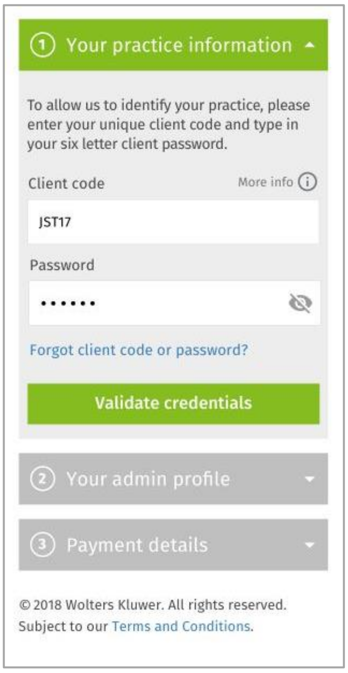
- The online activation wizard will guide you through the process of activating your practice's CCH workspace

2.1.1 Client code & password

- Enter your unique client code and six letter client password, then select **Validate credentials**

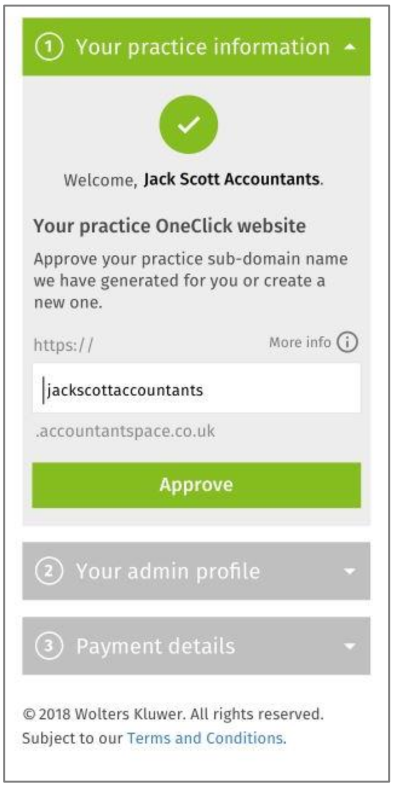


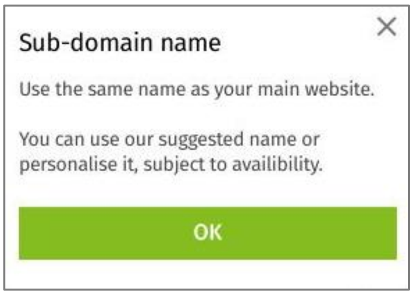




2.1.2 Domain name

- Based on the credentials you have just entered, a CCH OneClick domain name will be suggested for you
- You can change this suggestion if required, subject to availability
- Select **Confirm** when you are happy with the name

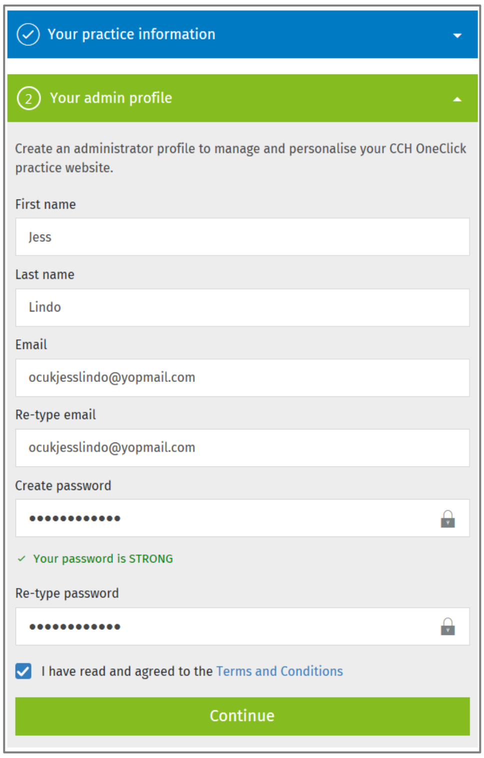




- Read and accept the terms and conditions, then select **Continue**

2.1.3 Admin user account

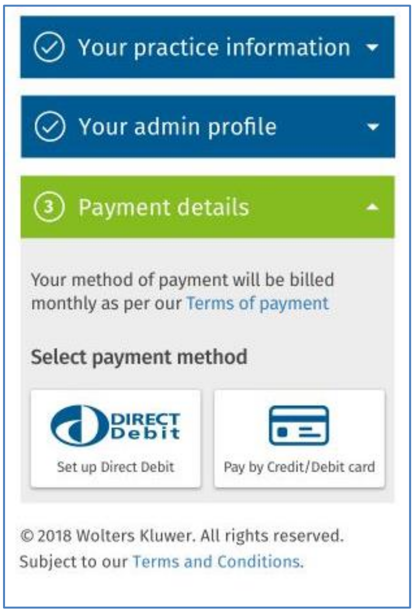
- An admin user profile must now be created to manage your practice's CCH OneClick workspace



- The email address used to setup the administrator account must <u>NOT</u> be the same as an email address used in CCH Central by an employee that you wish to active for CCH OneClick
- If your OneClick administrator will also be a user of CCH OneClick, 2 different email addresses will be required
- Tick to say you have read and agreed to the terms & conditions then continue

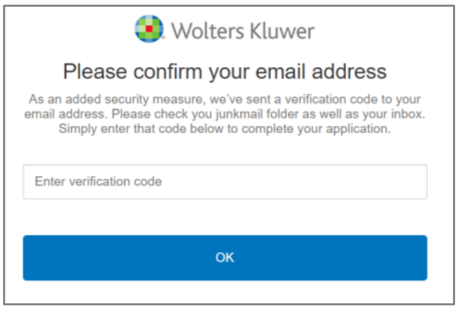
2.1.4 Enter payment details

- Select if you want to pay by direct debit or credit card and enter the relevant details
- If you require more than 1 signatory to setup a direct debit, please contact us directly on +44 (0)344 561 8181 (option 5 then option 1)
- Select **Ok, thanks**

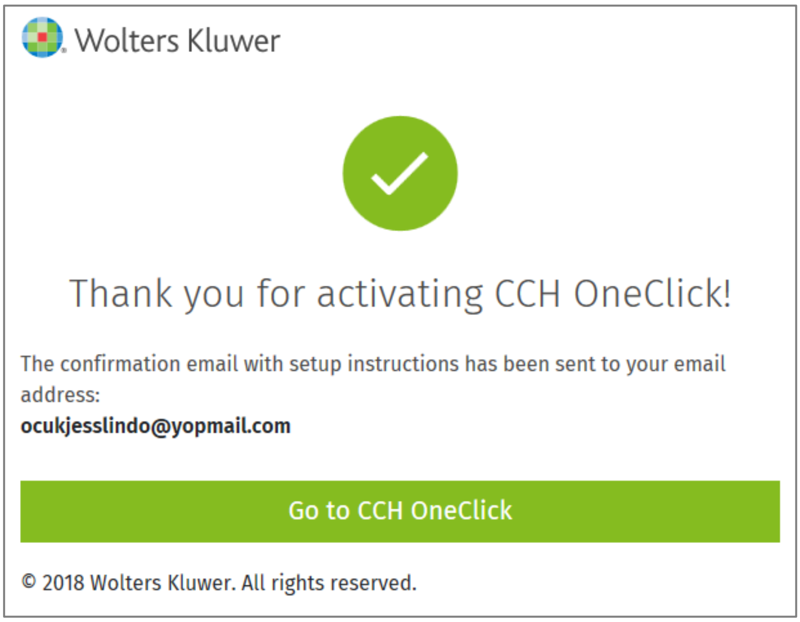


2.1.5 Activation complete

- Once your payment details have been entered, you will be asked to enter an activation code that you'll receive by email from Bottomline Technologies PT-X Onboarding <ptxo-no-reply@pt-x.com>



- Once the code is entered your CCH OneClick workspace will be activated!



- Select **Go to OneClick** and when prompted use the login details created for the admin account

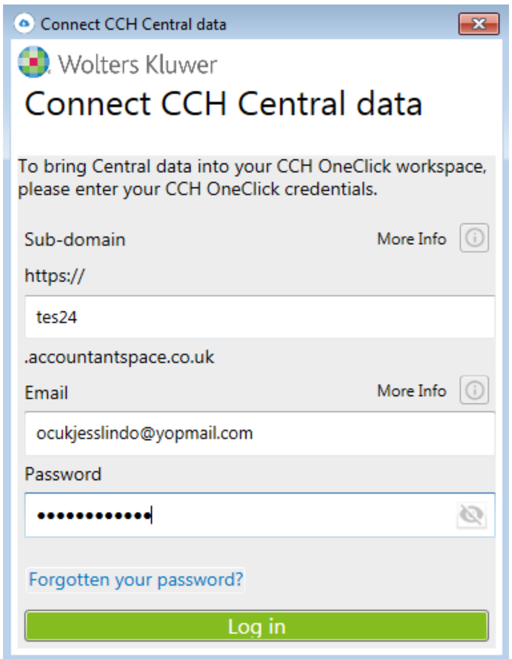
2.2 Link your CCH Central database to CCH OneClick

- To link your CCH Central database to CCH OneClick, select the **Connect CCH Central data** tile on your workspace

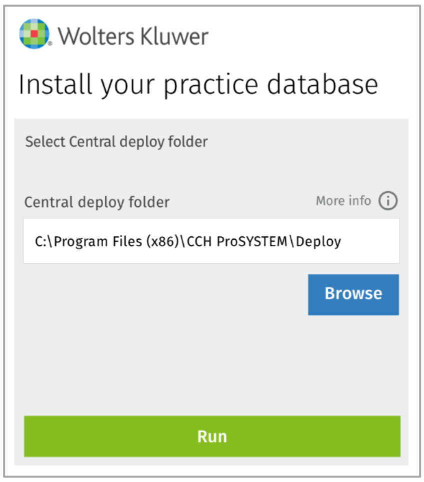
- This will launch a download for an executable file that needs to be run against your CCH Central database

- Select the CentralDatabaseInstaller.exe to start the wizard that will guide you through the connection process

1. Enter your CCH OneClick credentials used for the activation process above

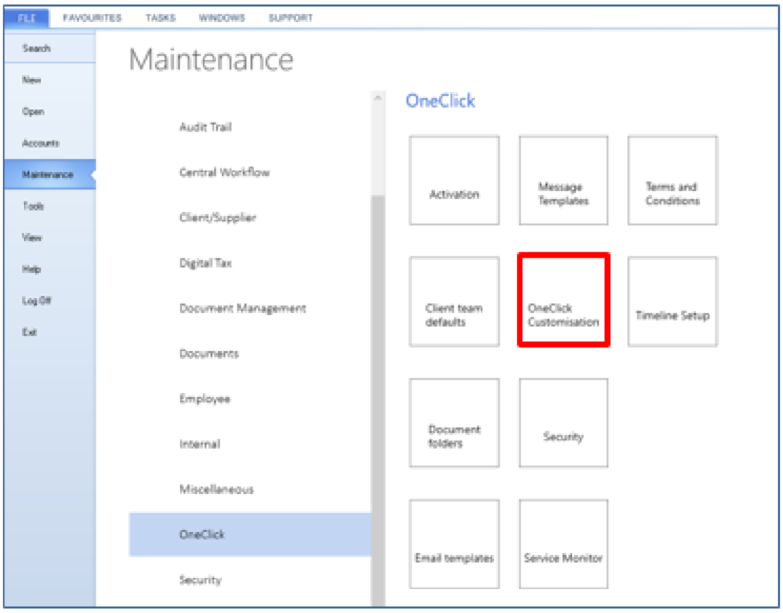


2. Browse to your Central deploy folder and select **Run**

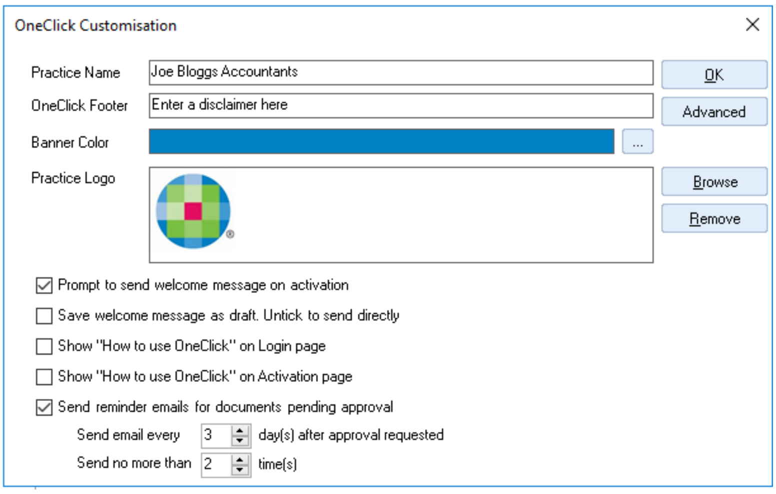


2.3 Customise the CCH OneClick workspace

- Customisation of the workspace will be relected on the workspace that your client sees and not on your own practice workspace
- To customise the background and logo, return to CCH Central
- **File > Maintenance > OneClick > OneClick Customisation**



- You will then be presented with the OneClick customisation screen

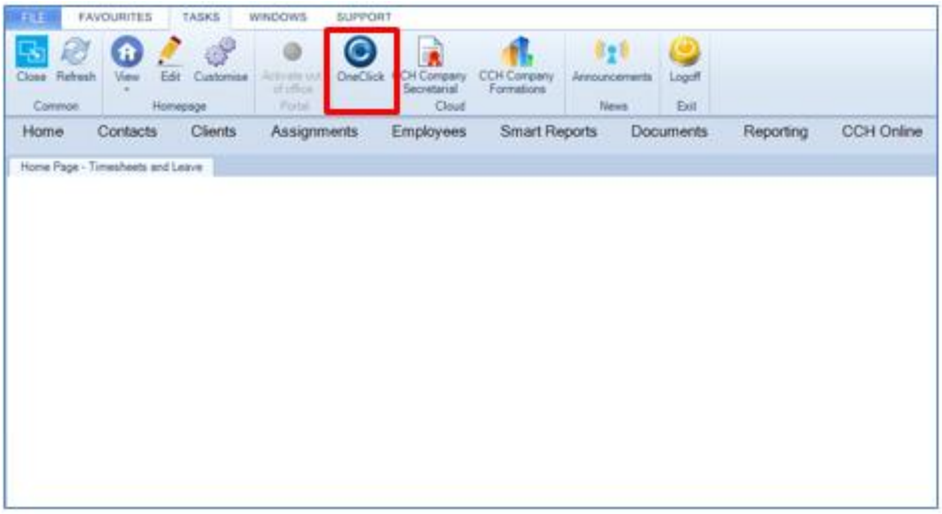


- Within the OneClick customisation screen you can:-
  - → Enter your practice name
  - → Enter a portal footer, which might be used either for the practice's promotional strapline or a copyright message.
  - → Banner Colour enables you to customise the colour on the banner header on the login page and portal which the client sees. You have access to the usual colour palette by clicking the .
  - → If you want to use the custom colour palette, click Define Custom Colours and select your chosen colour, clicking Add to Custom Colours when you have the required colour. For lighter shades use the hue slider.
  - → Add your practice's logo – this can be done by selecting browse and locating the image from within your files. The recommended size for your logo is 215x60 pixels.

- You then have a number of check boxes that allow you to:-
  - → Prompt to send a standard welcome message on activation. When this is selected you will be prompted to send an email for both employees and clients once their OneClick workspace has been created. If this is not ticked the email will be sent without further input from someone in the practice before sending.
  - → Once the above option is selected, you now have the option to select/unselect the option to save the message as a draft. When this is selected, it will save welcome messages as a draft to allow for amending prior to sending. When unselected, emails will send automatically.
  - → Draft messages can be found in the Messages & Documents section of the OneClick homepage
  - → Finally, the send reminder emails for documents pending approval option, when selected, will provide you with the option for how often a reminder should be sent and the maximum number of times to send a reminder email.

2.4 OneClick tab within CCH Central

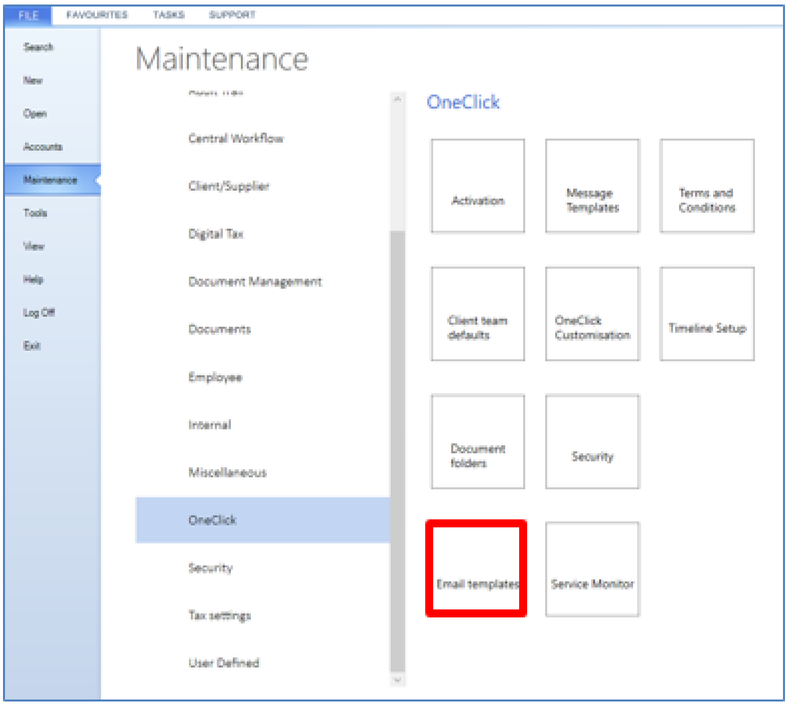
- From within the CCH Central homepage, you will notice an icon on the ribbon bar for OneClick



- Selecting this will load your CCH OneClick workspace in your default browser

2.5 Email Templates

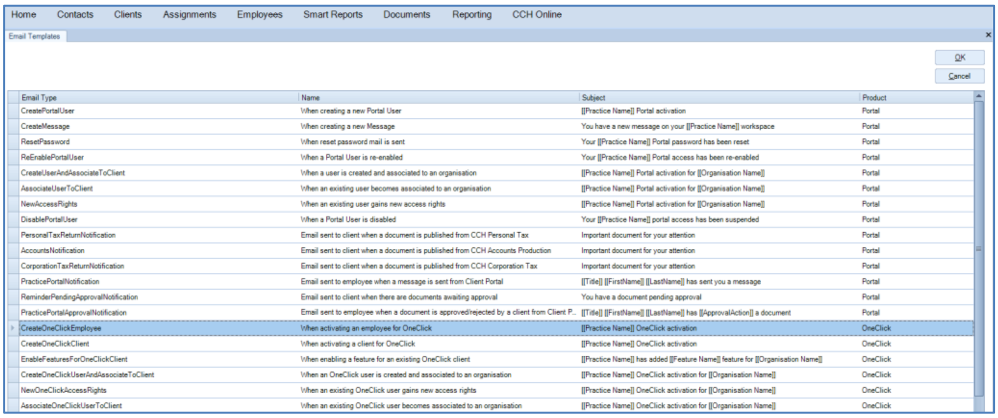
- You will now want to review/amend the email templates that will be sent to employees and clients. These can be viewed by selecting **File, Maintenance > OneClick > Email templates.**

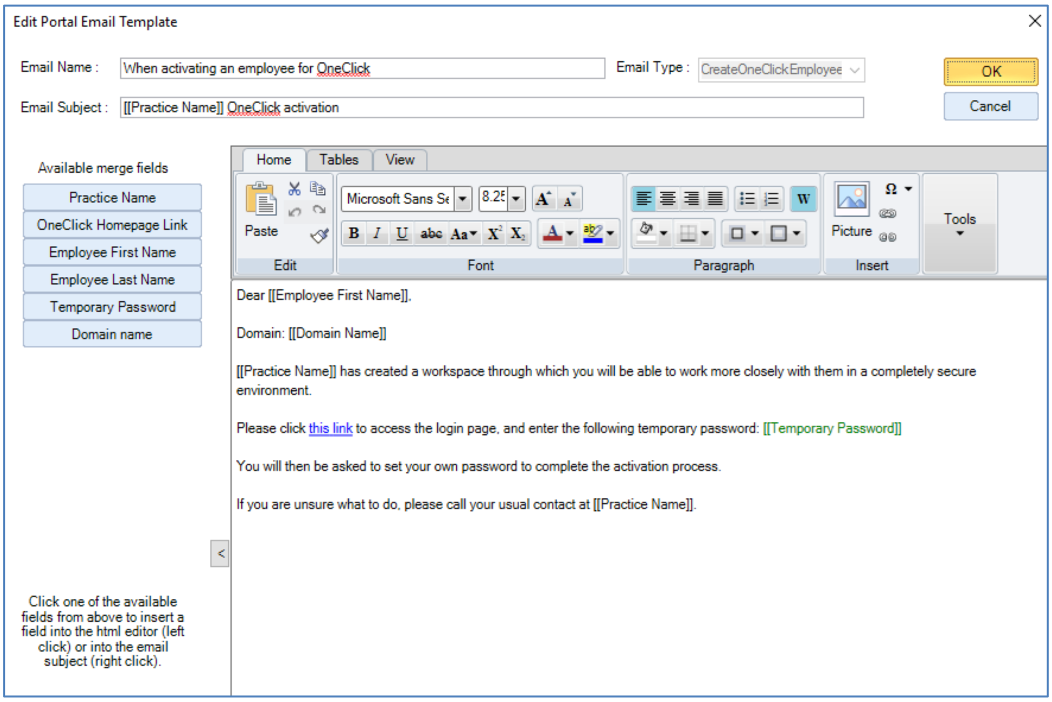


- Once selected, you can view the list of available templates. The templates cover the following:-

When activating an employee for OneClick
When activating a client for OneClick
When enabling a feature for an existing OneClick client
When an OneClick user is created and associated to an organisation
When an existing OneClick user gains new access rights
When an existing OneClick user becomes associated to an organisation
When an OneClick user is disabled
When an OneClick user is re-enabled
When reset password mail is sent
When sending a new Information Request
When an existing Portal user is converted to an OneClick user

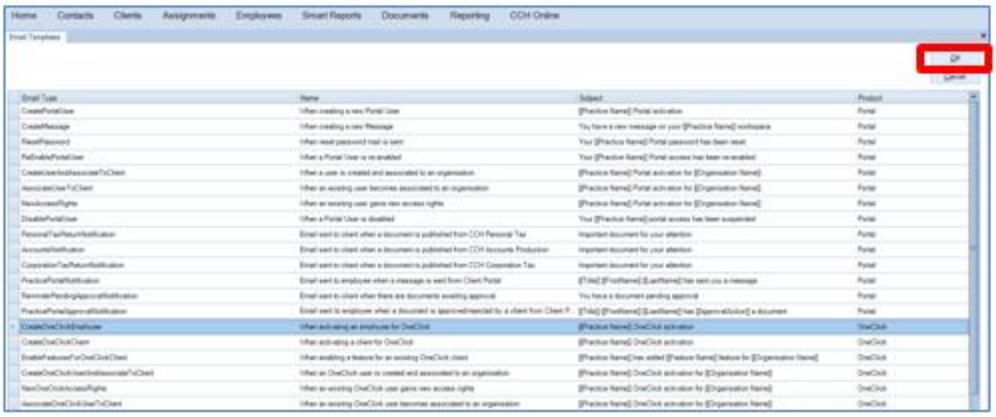
- To open a template, double click on your chosen template, this will open the 'Edit OneClick Email Template' screen





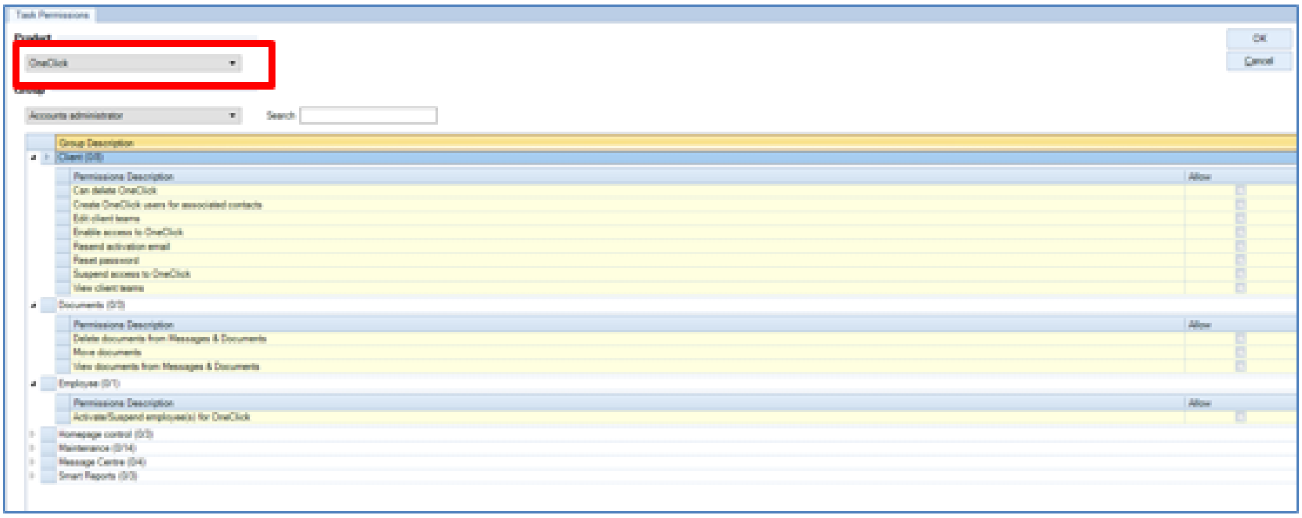
- Amend the template as required
- A logo can be added to the email by selecting **Picture** on the ribbon

- Once you are happy with the content, select **OK**
- Select OK on the email template list to close



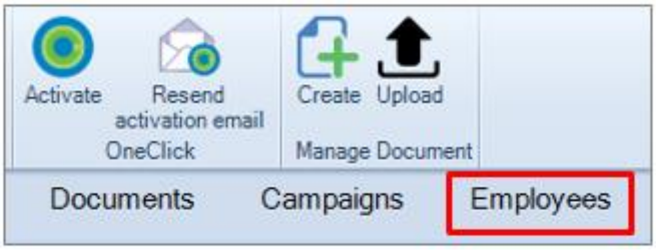
2.6 Set employee (Practice user) permissions

- As with all of the CCH suite, there are user permissions to set for your practice CCH OneClick users to meet your internal requirements
- User permissions can be found in **Maintenance > Security > Task Permissions**
- Select OneClick from the Product drop down then, for each security group you have created within the practice, review and allow permissions as appropriate by ticking the relevant box. Select OK to save changes

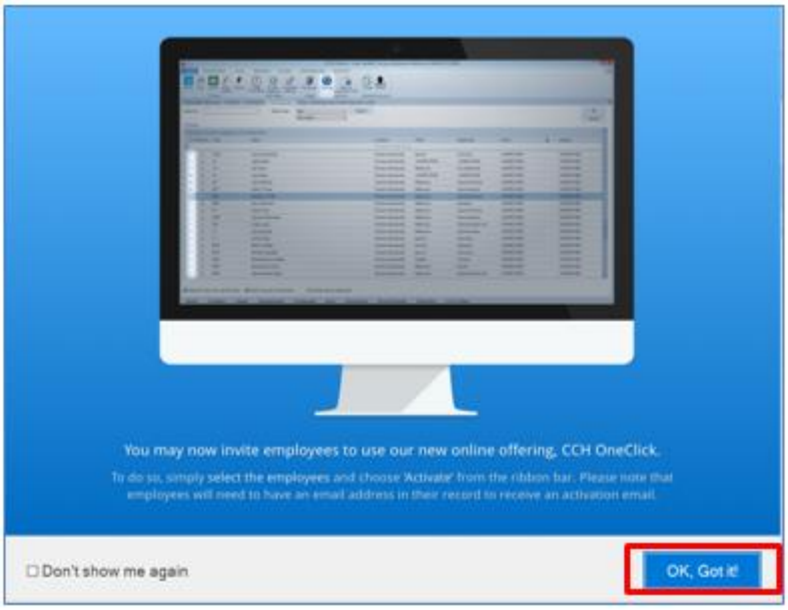


3. Activate practice employees for OneClick

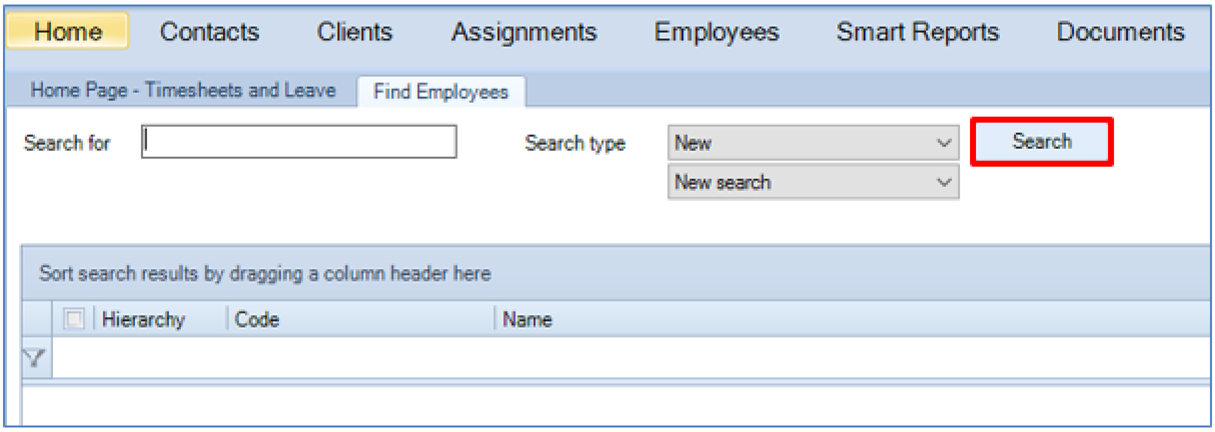
- Select **Employees** from the taskbar



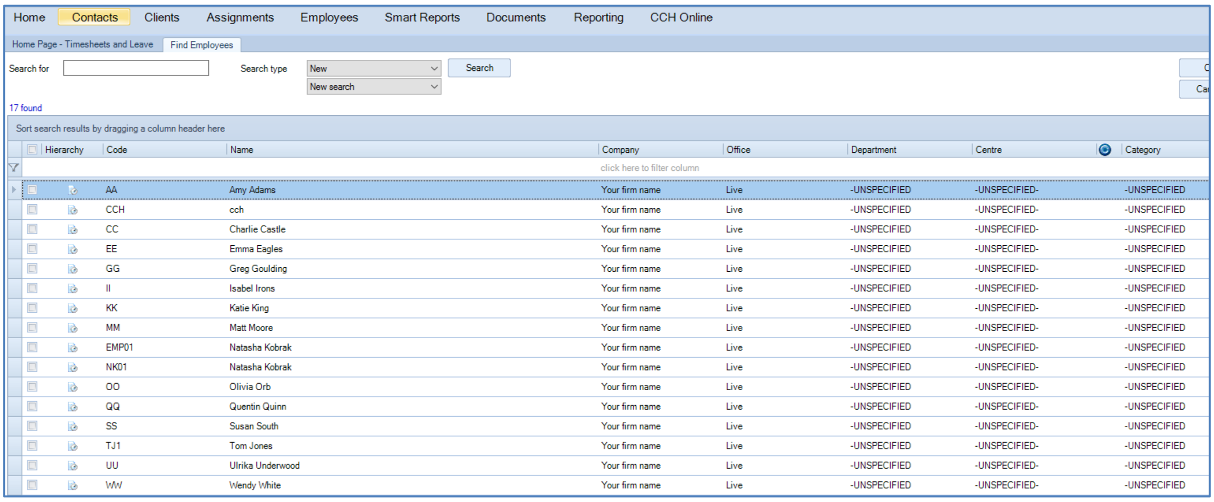
- Once selected, you will be presented with the following message:-



- Select 'OK, Got it!' and tick the 'Don't show me again' button if you're happy with the content of this screen
- Select 'Search'

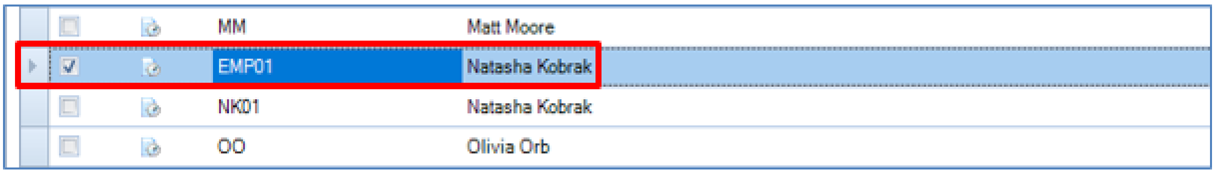


- The full employee list will be populated



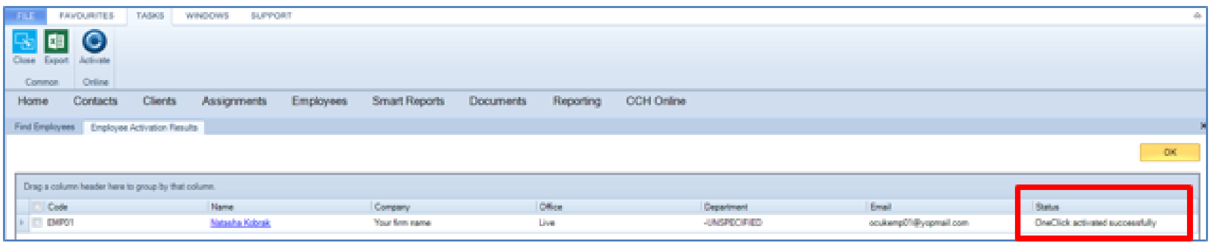
Hierarchy	Code	Name	Company	Office	Department	Centre	Category
	AA	Amy Adams	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-	-UNSPECIFIED
	CCH	cch	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-	-UNSPECIFIED
	CC	Charlie Castle	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-	-UNSPECIFIED
	EE	Emma Eagles	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-	-UNSPECIFIED
	GG	Greg Goulding	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-	-UNSPECIFIED
	II	Isabel Irons	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-	-UNSPECIFIED
	KK	Katie King	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-	-UNSPECIFIED
	MM	Matt Moore	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-	-UNSPECIFIED
	EMP01	Natasha Kobrak	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-	-UNSPECIFIED
	NK01	Natasha Kobrak	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-	-UNSPECIFIED
	OO	Olivia Orb	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-	-UNSPECIFIED
	QQ	Quentin Quinn	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-	-UNSPECIFIED
	SS	Susan South	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-	-UNSPECIFIED
	TJ1	Tom Jones	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-	-UNSPECIFIED
	UU	Ulrika Underwood	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-	-UNSPECIFIED
	WW	Wendy White	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-	-UNSPECIFIED

- Select the employee(s) you wish to activate



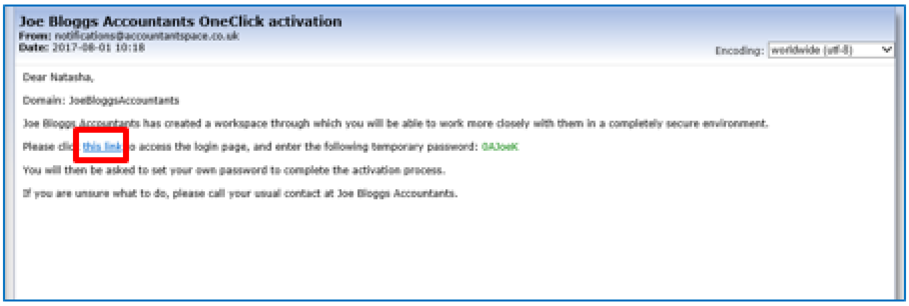
- Select 'Activate' on the ribbon bar

- The following will then be presented to inform you that the activation has been successful



- Select OK

- The employee will now receive an email asking them to click the link to access the login page and enter a temporary password


Joe Bloggs Accountants OneClick activation
From: notifications@accountantspace.co.uk
Date: 2017-08-01 10:18

Encoding: worldwide (utf-8)

Dear Natasha,

Domain: JoeBloggsAccountants

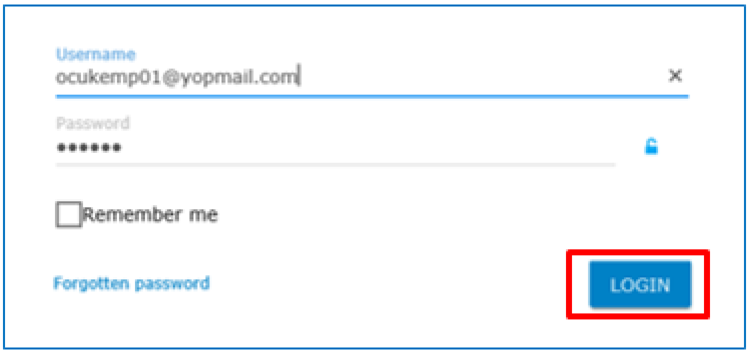
Joe Bloggs Accountants has created a workspace through which you will be able to work more closely with them in a completely secure environment.

Please click this link to access the login page, and enter the following temporary password: 0AJoeK

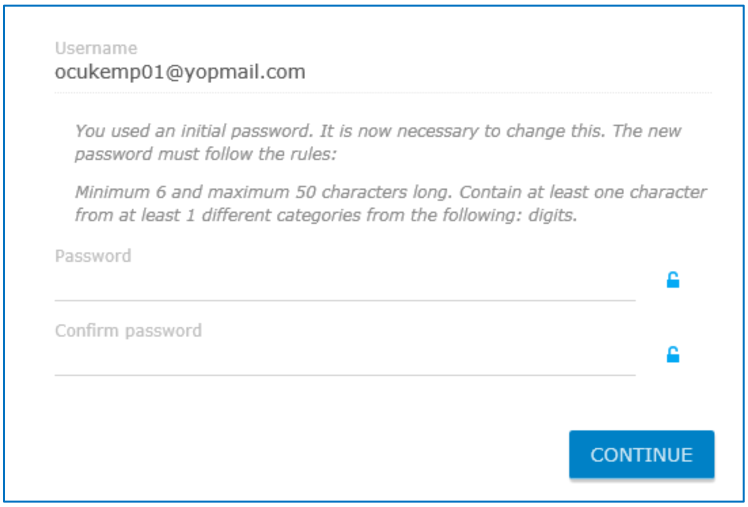
You will then be asked to set your own password to complete the activation process.

If you are unsure what to do, please call your usual contact at Joe Bloggs Accountants.

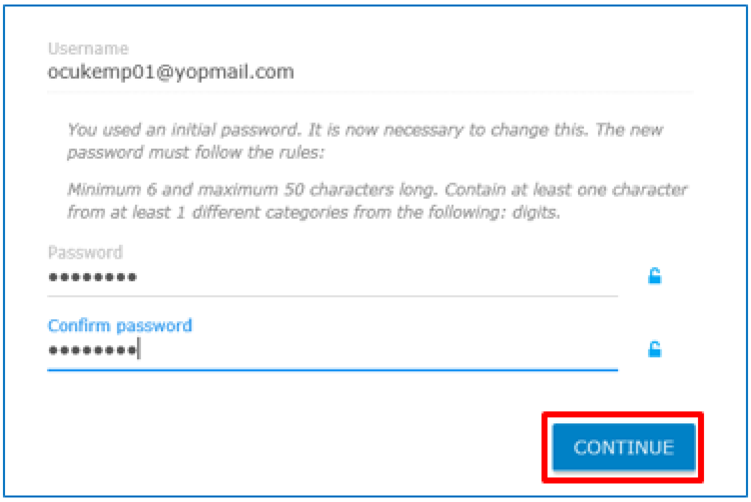
- Once the link is clicked, a web browser will open and the employee will be asked to enter their email address and the temporary password provided in the activation email



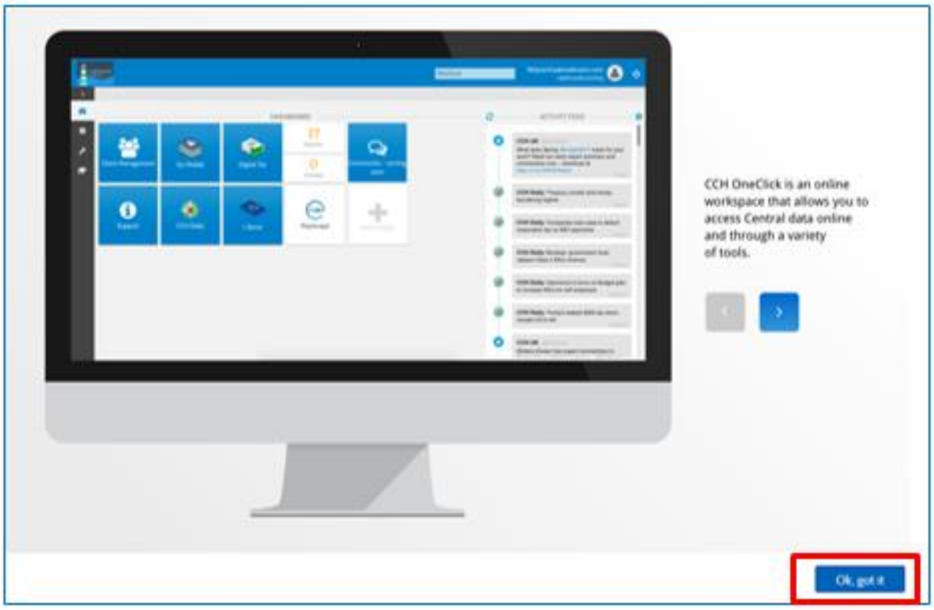
- Once login is selected, the employee will be asked to create a new password



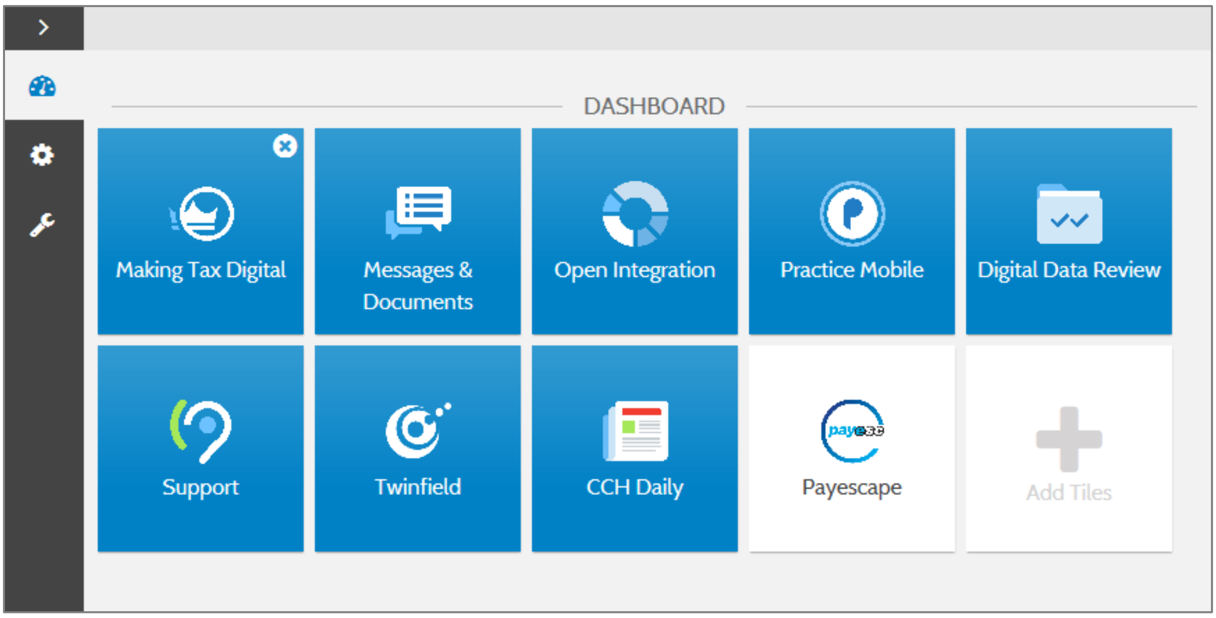
- Select 'Continue' once the new password has been entered



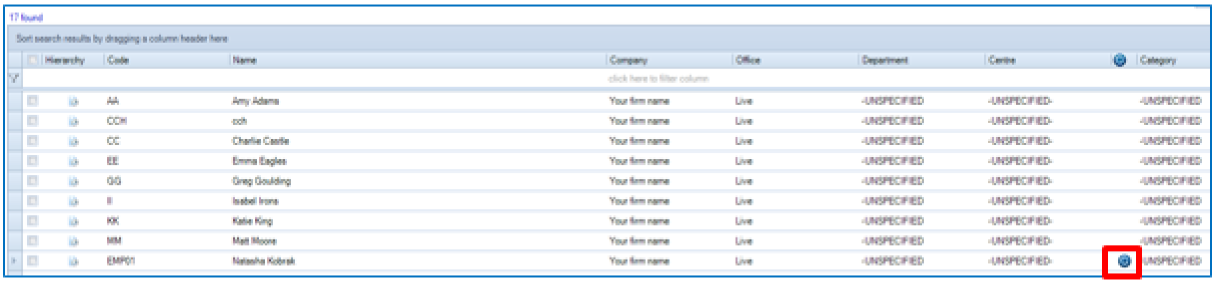
- The employee will then be presented with the following screen to take them through an introduction to CCH OneClick



- The OneClick dashboard will now be presented and your employee can begin to use their OneClick workspace.



- Upon returning to the employee list, you will notice the employee now has the OneClick icon next to their name to signify they are now activated for OneClick.


17 found

Sort search results by dragging a column header here

Hierarchy	Code	Name	Company	Office	Department	Centre		Category
	AA	Amy Adams	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-		-UNSPECIFIED
	CCH	cch	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-		-UNSPECIFIED
	CC	Charlie Castle	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-		-UNSPECIFIED
	EE	Emma Eagles	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-		-UNSPECIFIED
	GG	Greg Goulding	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-		-UNSPECIFIED
	II	Isabel Irons	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-		-UNSPECIFIED
	KK	Katie King	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-		-UNSPECIFIED
	MM	Matt Moore	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-		-UNSPECIFIED
	EMP01	Natasha Kobrak	Your firm name	Live	-UNSPECIFIED	-UNSPECIFIED-		UNSPECIFIED

4. OneClick Permissions Admin

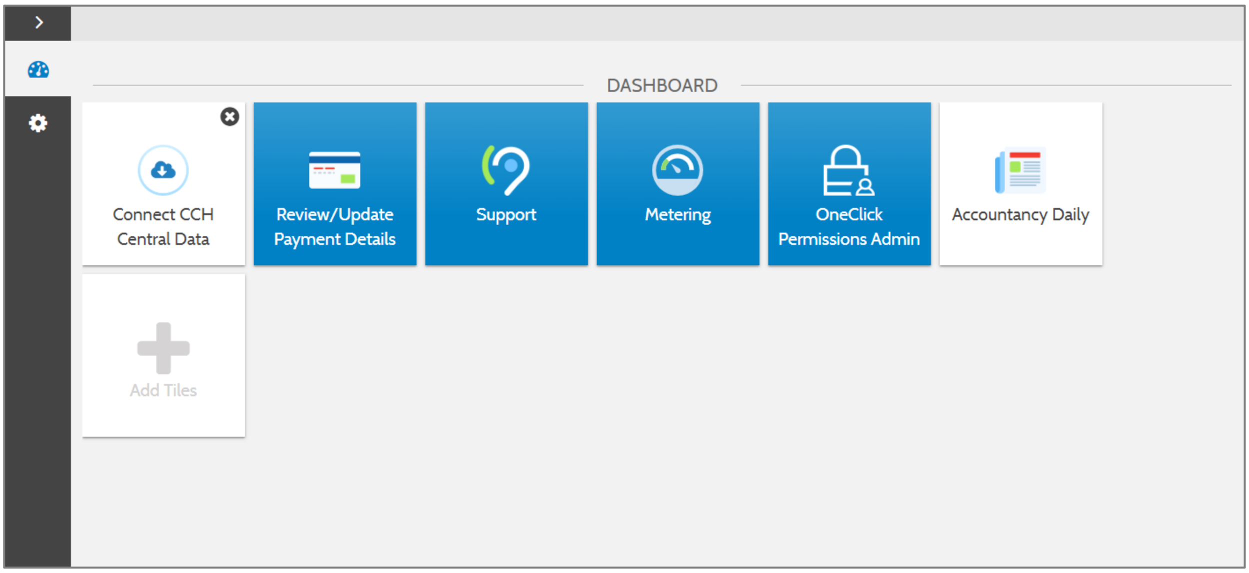
The latest release includes the option to assign CCH OneClick users to a set of pre-defined roles. The roles allow you to control which area of the CCH OneClick suite your users have access to.

As this is a new feature within CCH OneClick, all users will, by default, be added to the basic roles for all products

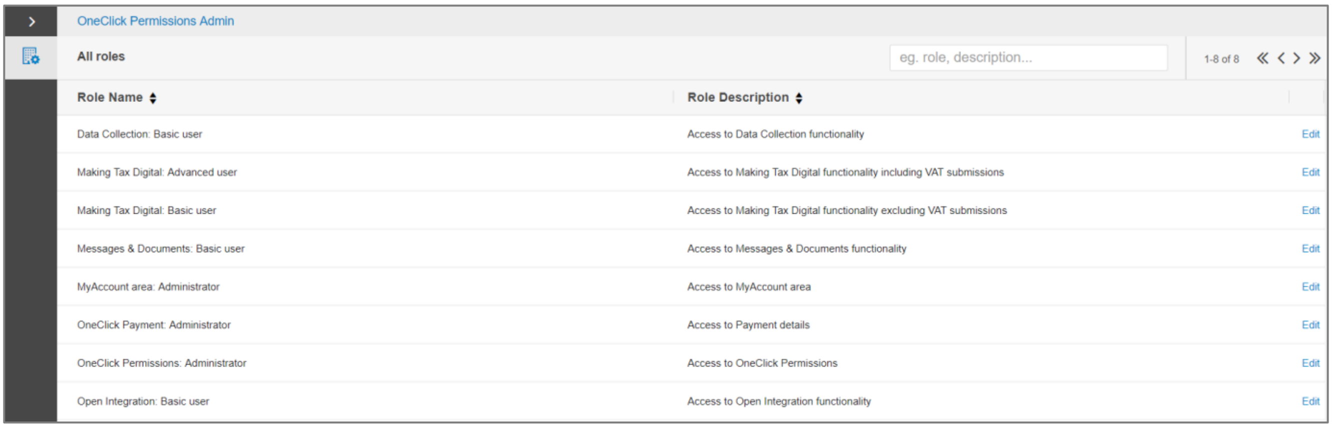
This list is currently limited but will grow with future CCH OneClick releases.

You can manage the roles for your practice's CCH OneClick users through the OneClick Permissions Admin tile within the admin workspace.

Note: To access OneClick Permissions Admin, you must log in to your CCH OneClick Admin account. This should have been setup when you set up CCH OneClick. (If you didn't set up an admin account, please navigate to https://oneclick.accountantspace.co.uk/activation and follow the instructions to do so)



Within this area, you will see a list of pre-defined roles into which you can assign your CCH OneClick users



A role defines a set of permissions, so when a user is assigned to a role, they will be given the permissions defined within that role. The details of a role can be seen under the description field.

Note: The permissions within these roles are pre-set and cannot be edited

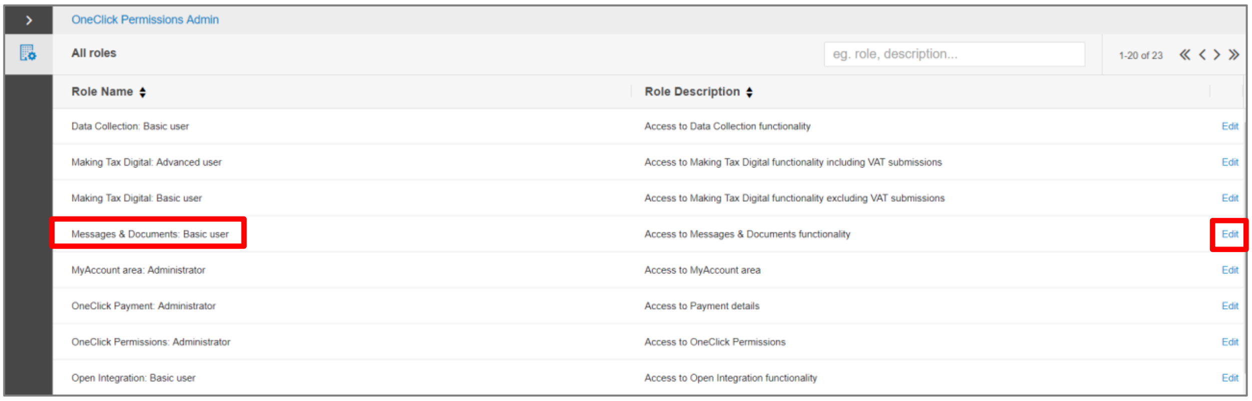
The current list of roles and description is shown below with a brief explanation of the user experience:-

Role Name	Description	Experience
Data Collection: Basic user	Access to Data Collection functionality	User will see the Digital Data Request tile in CCH OneClick
Making Tax Digital: Basic user	Access to Making Tax Digital functionality excluding VAT submissions	User will see the MTD tile in CCH OneClick, but will not see the Submit VAT button within MTD
Making Tax Digital: Advanced user	Access to Making Tax Digital functionality including VAT submissions	Same as the basic user, but the user will see the Submit VAT button within MTD
Messages & Documents: Basic user	Access to Messages & Documents functionality	User will see the Messages and Documents tile in CCH OneClick
Open Integration: Basic user	Access to Open Integration functionality	User will see the Open Integration tile in CCH OneClick
OneClick Payment: Administrator	Access to Payment details	User will see the Practice Payment information tile in CCH OneClick. This should be used for employees who are also Practice Administrators
OneClick Permissions: Administrator	Access to OneClick Permissions	User will see the Permissions Admin tile in CCH OneClick. This should be used for employees who are also Practice Administrators.

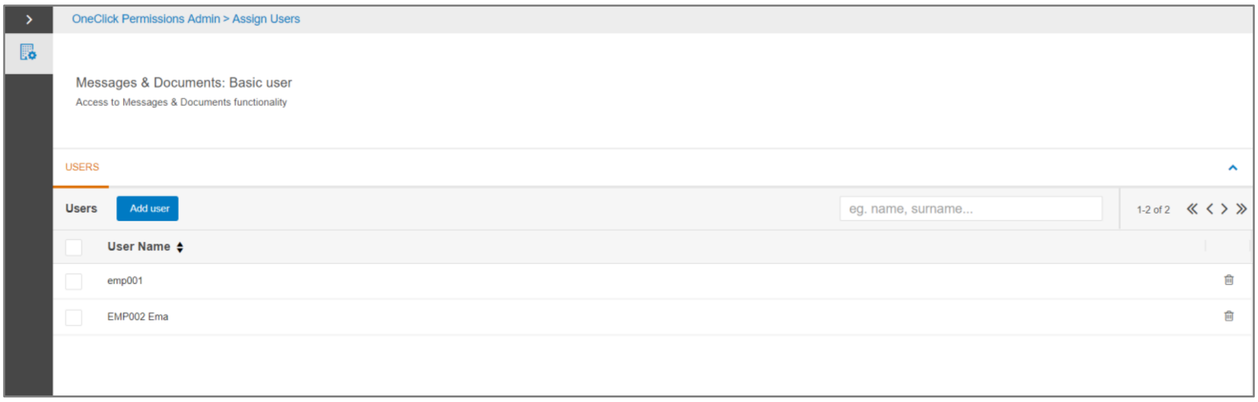
If a user is removed from a basic role, they will no longer have the permissions set by that role. They will also lose the ability to view that specific tile within their CCH OneClick workspace

e.g. If a user is removed from the Messages & Documents: Basic user role, they won't have permissions to use Messages & Documents and they will no longer see the Messages & Documents tile

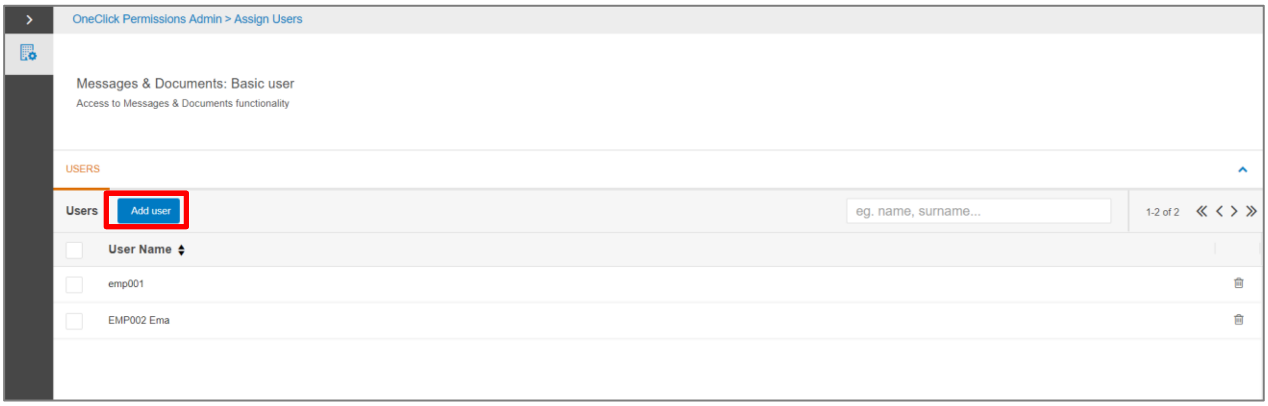
- To see which users belong to a particular role, either click the role name or select **Edit**



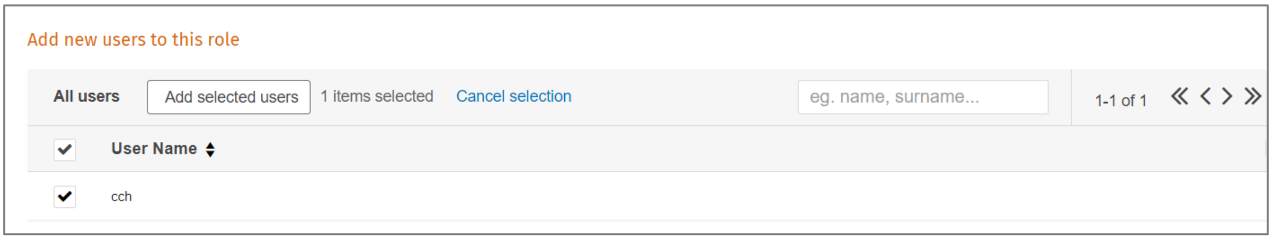
- A list of all users currently assigned to that role will be shown



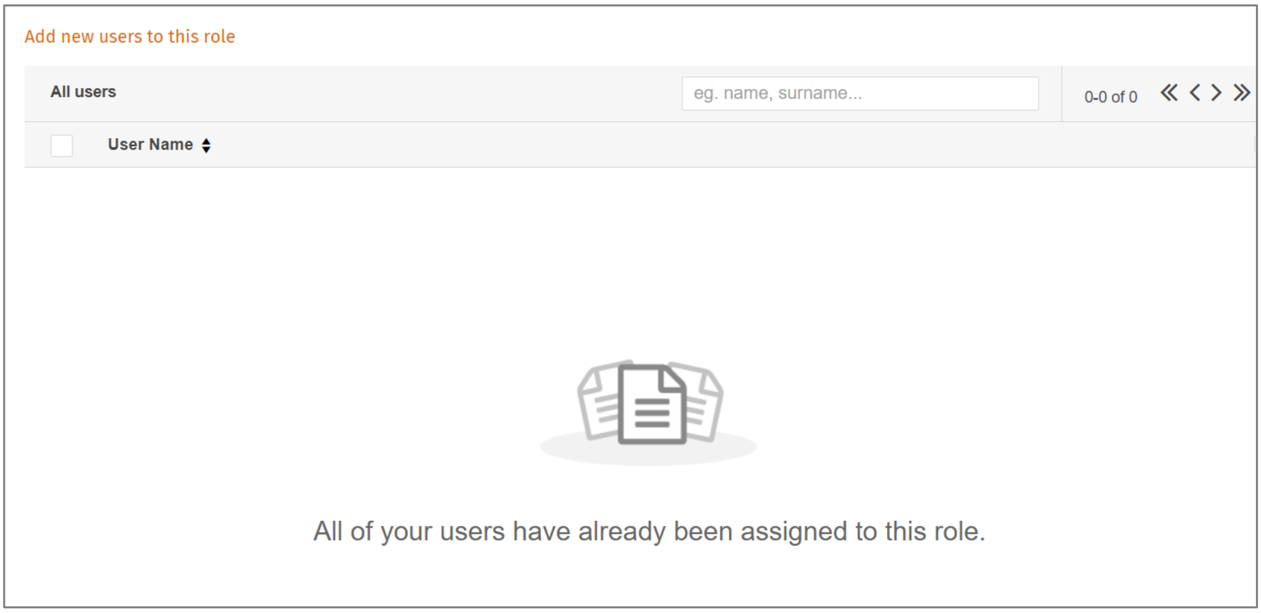
- To add a user to the role, select the **Add User** button



- Select the box next to the user/s you want to add to the role and click the **Add selected users** button



- If there are no users available to add the following message will appear



- To remove a user from a role, tick the box next to the user/s and select **Remove users**

- Users will be subject to their new roles the next time they log in to CCH OneClick

5. Activate a Client for CCH OneClick

- Once a client has been activated they will be able to access their own workspace within OneClick
- If you would like to inform your clients about CCH OneClick prior to them receiving an activation email, please make use of the CCH OneClick flyer on our support site https://www.cch.co.uk/softwaresupport/2015/cch_oneclick/get_started.asp

- To complete the activation, clients will require an activation code. This is their client code from within CCH Central
- If required, the email merge facility can be used to inform clients of their activation code in bulk
- Instructions on how to setup the email merge can be found here

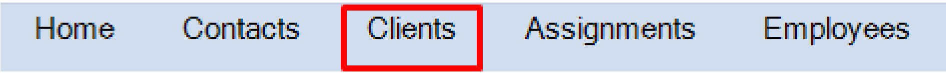
Text message activation

- There is also the option to send an SMS text message with the Activation ID to clients who have a primary mobile phone number set in CCH Central
- This option is called **Send Activation ID via SMS** and can be found under **Maintenance > OneClick > Security**

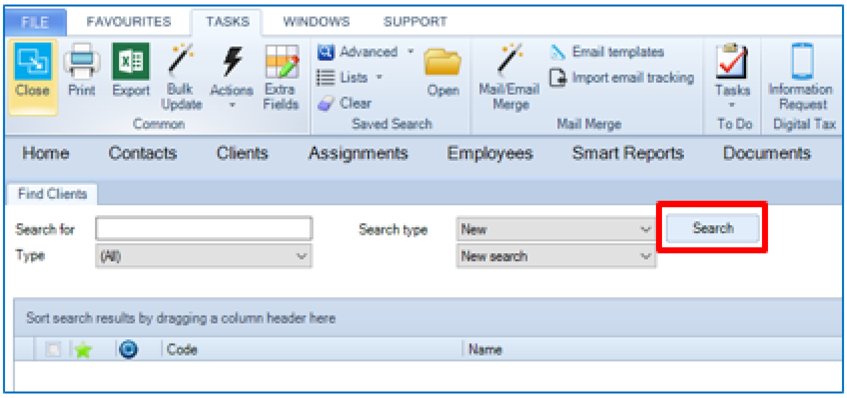
- If this option is selected, when a client clicks on the link within the activation email, an SMS containing a randomly generated code is sent to the client's mobile, which they should then enter in the activation page. This is sent to the primary mobile phone number set in Central

5.1 Client Partner

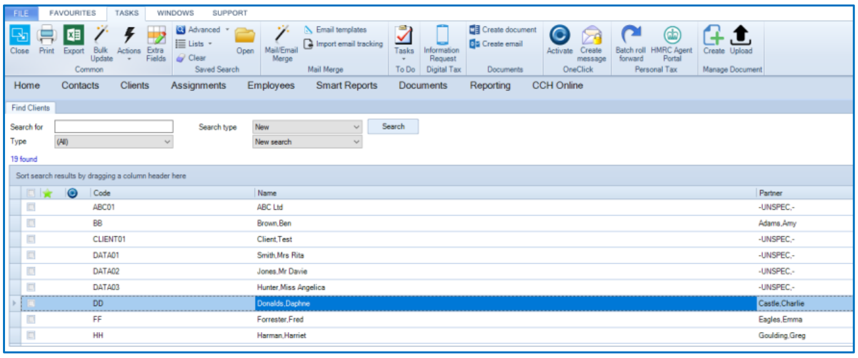
- In order for an employee to activate a client, the client must have a OneClick activated employee set as a partner. To do this, select Clients from the ribbon bar



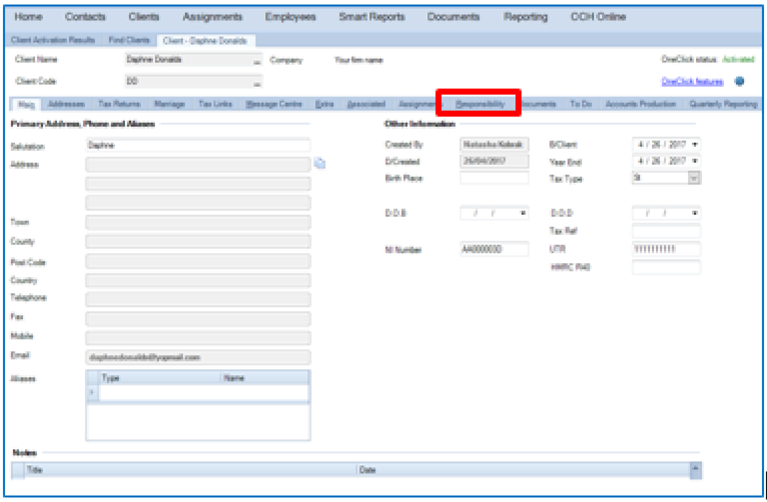
- You will be presented with a blank client list and select 'Search'



- The full client list will be populated



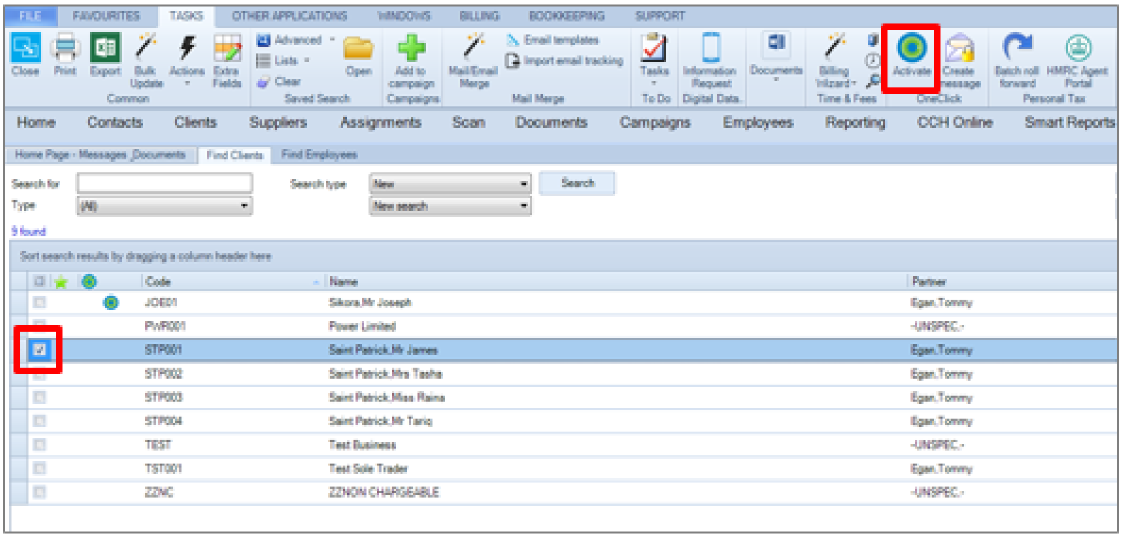
- Select a client and open the 'Responsibility' tab



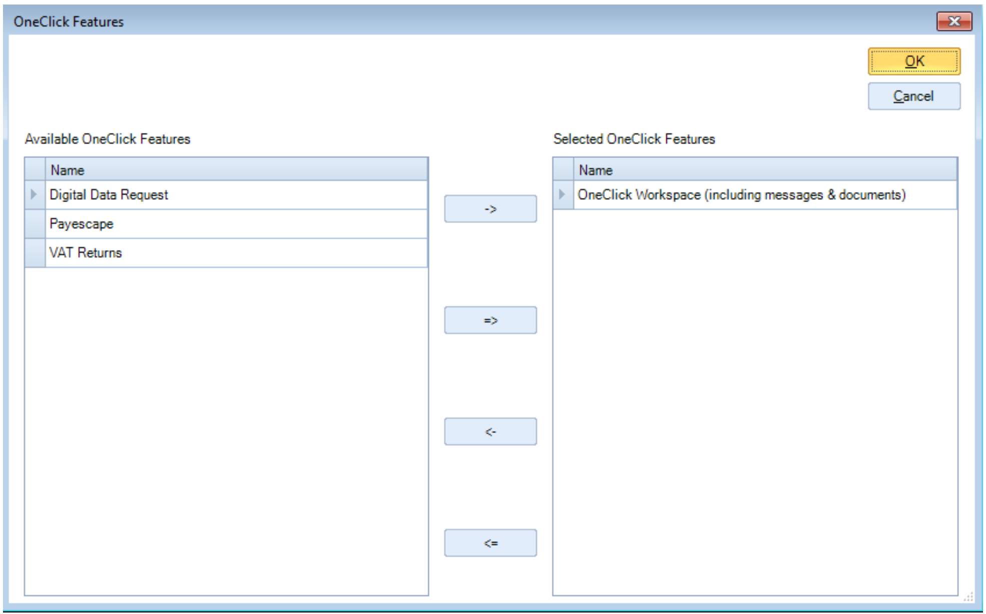
- Add a partner that is activated to use CCH OneClick to the client by selecting the ... button

5.2 Activate a client

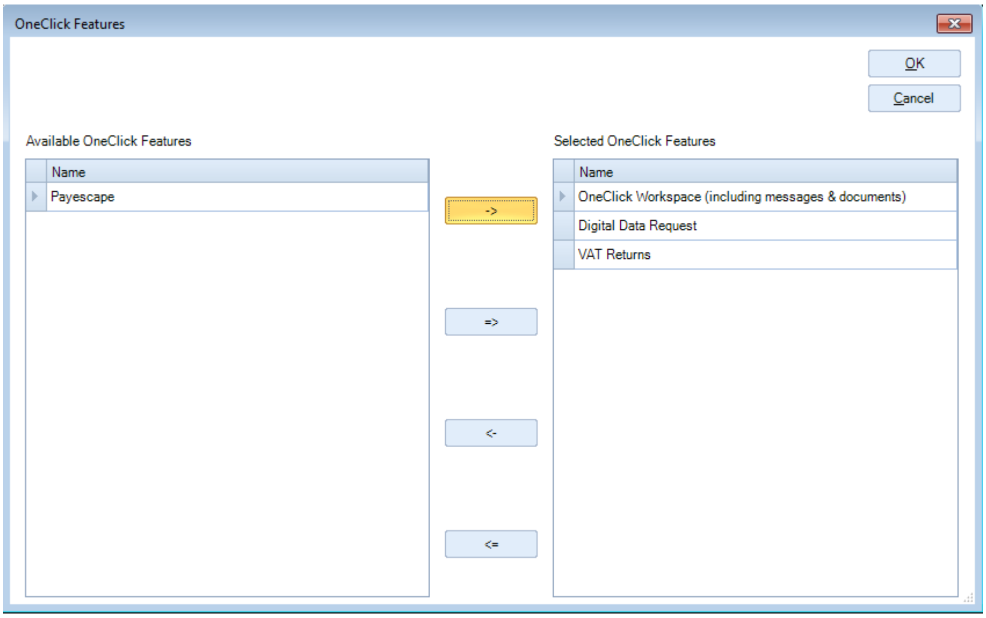
- Ensure you are logged in as a user who has the appropriate task permission to activate the client
- Select the checkbox next to the relevant client and select ‘Activate’
- Multiple clients can be activated at the same time
- The Activate OneClick button can also be found on the ribbon on the Home tab within the client record



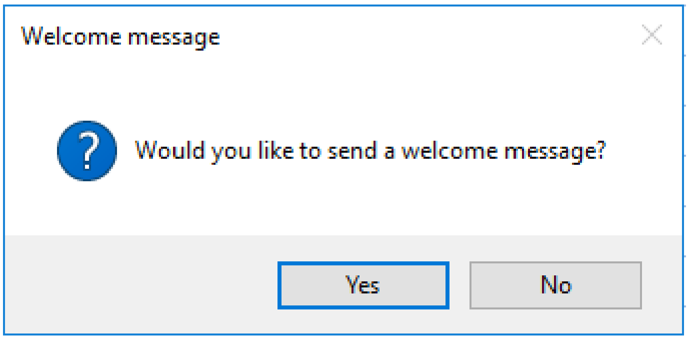
- Once activate has been selected, the following will be presented



- The features defaulted on the right hand side are mandatory features and cannot be removed.
- Use the  to move any of the other available features to the right hand side

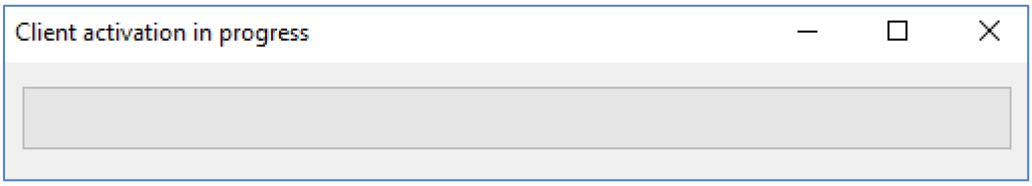


- If you have selected the option for a welcome message in the customisation area, you will be presented with the following message:-

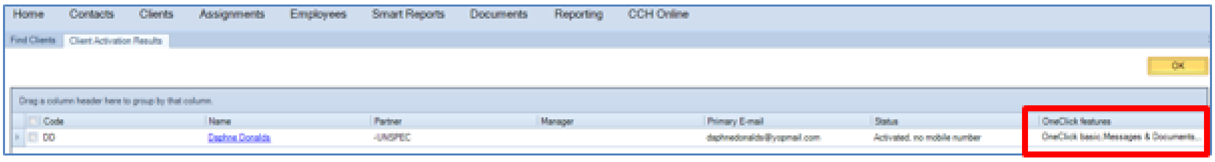


- Select Yes to send a welcome message to the client. We recommend you do this so the client knows their account has been created

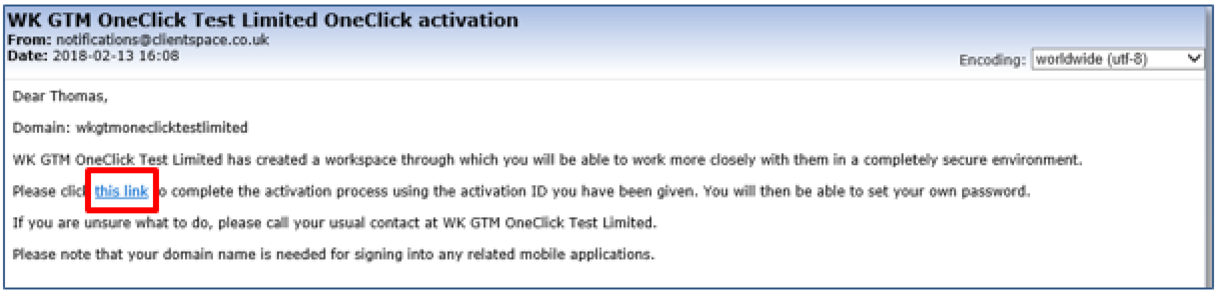
- If the following box appears, please wait for this to complete prior to continuing



- You will then be presented with client activation results, which will confirm the client activation has been successful



- The client will receive an email and will be asked to click the link to access the login page


WK GTM OneClick Test Limited OneClick activation
From: notifications@clientspace.co.uk
Date: 2018-02-13 16:08
Encoding: worldwide (utf-8)

Dear Thomas,

Domain: wkgtmoneclicktestlimited

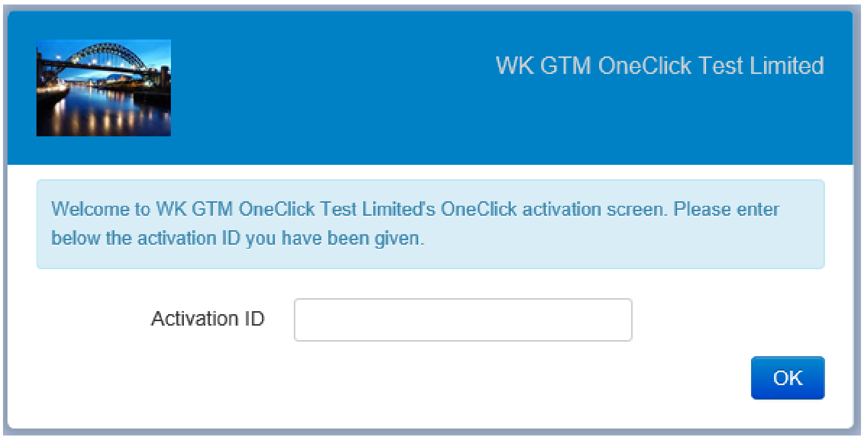
WK GTM OneClick Test Limited has created a workspace through which you will be able to work more closely with them in a completely secure environment.

Please click this link to complete the activation process using the activation ID you have been given. You will then be able to set your own password.

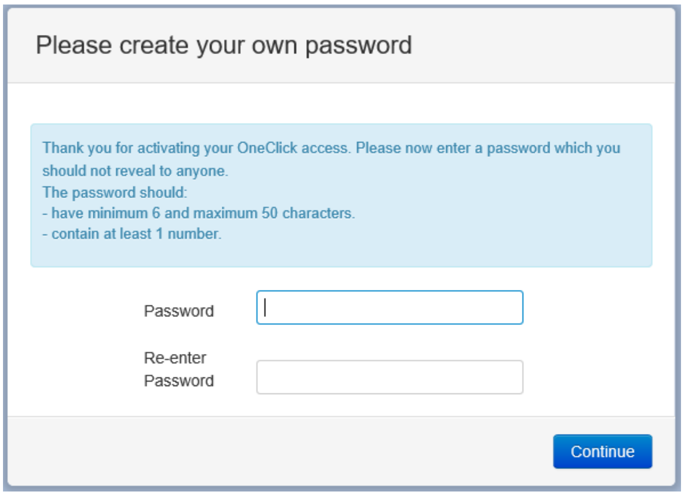
If you are unsure what to do, please call your usual contact at WK GTM OneClick Test Limited.

Please note that your domain name is needed for signing into any related mobile applications.

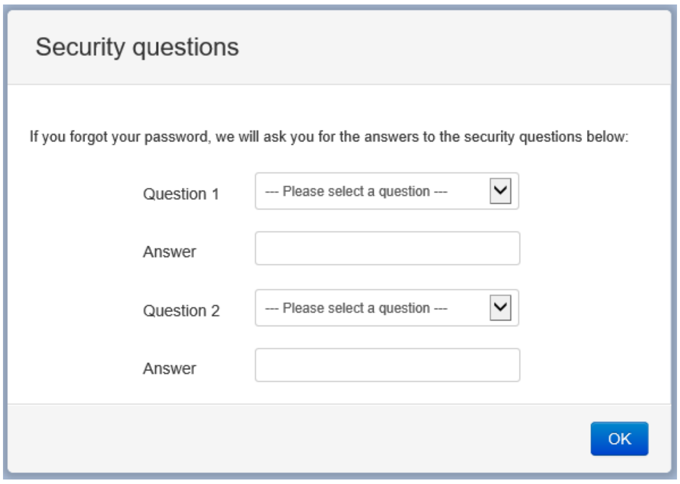
- Once the link is clicked, a web browser will open and the client will be asked to enter an activation ID which will have been sent to them via SMS. This will only be the case if your practice has chosen to use SMS and the client has provided a mobile telephone number
- Alternatively, the activation code will be the client code you use in CCH Central



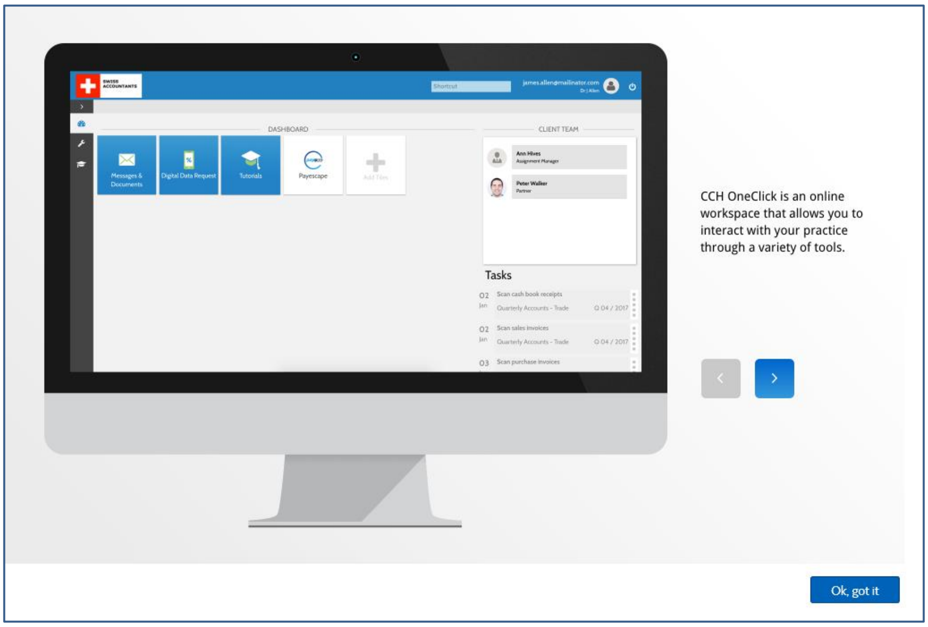
- After entering the activation ID a new password should be set



- The client will be requested to enter the new password twice and then select 'Continue' once complete.
- Next, the client will be asked to provide answers to security questions as below, in case the chosen password is not remembered



- Once the answers to the two questions have been provided, select OK to continue.
- They will be presented with the following introduction screen:-



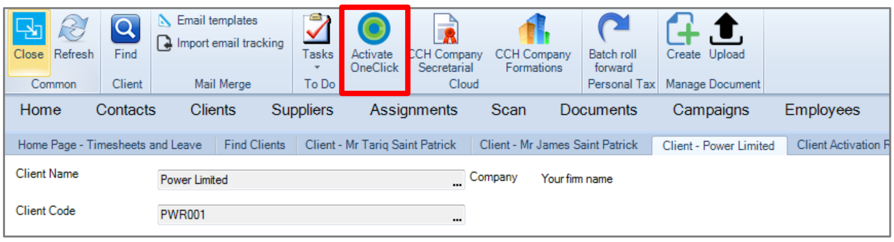
- After selecting **OK, got it**, the OneClick dashboard will be presented and your client can begin to use their OneClick workspace

5.3 Activate Organisational Clients and Associated contacts

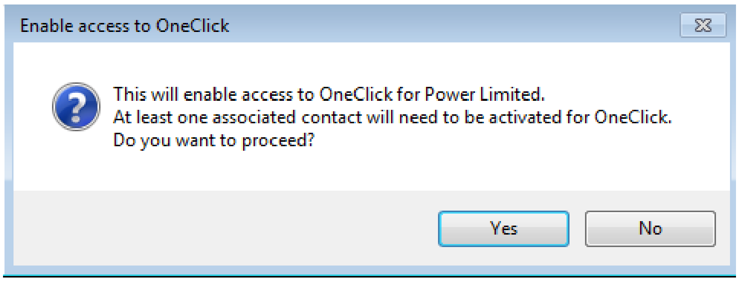
- The process of activating an organisational client is the same as that for an individual client. The only difference is for organisations, you will need not only need to activate the organisational client's workspace, but also the users who will have access to it (e.g. the directors); the associated contacts.
- Before activating the workspace for the organisation, please ensure that any anticipated users are listed as associated contacts and that they have a current valid email address

5.3.1 Activation

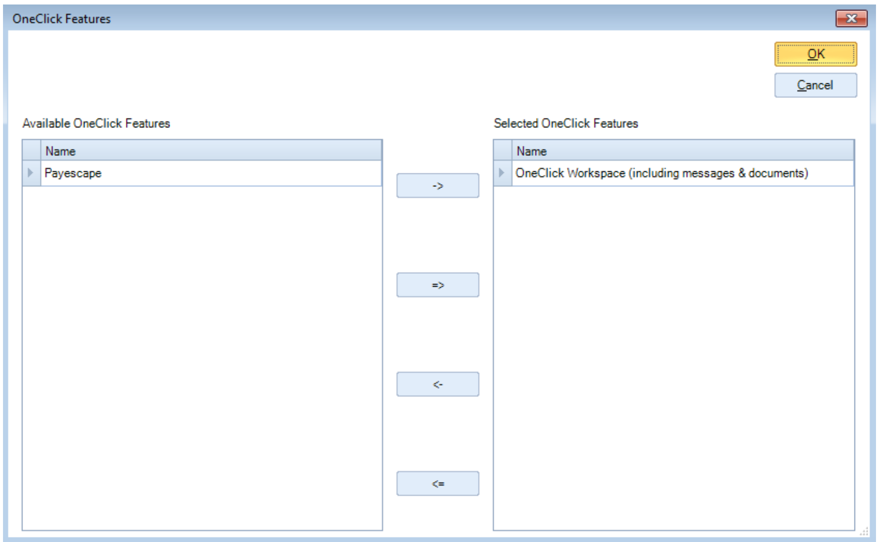
- Activate the organisation by selecting the **Activate OneClick** button on the ribbon on the **Home** tab within the client record



- Select **yes** to proceed

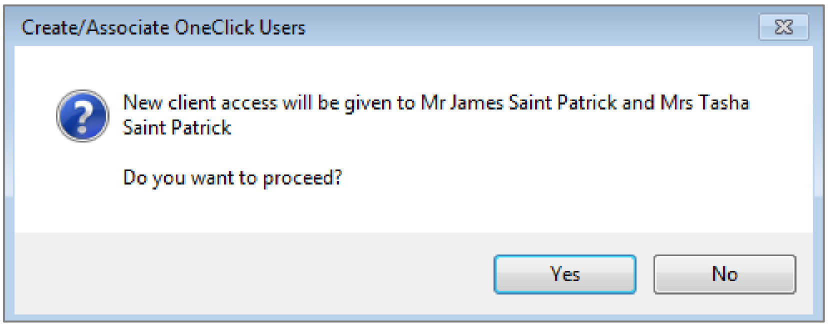


- Select the relevant features and click **OK**

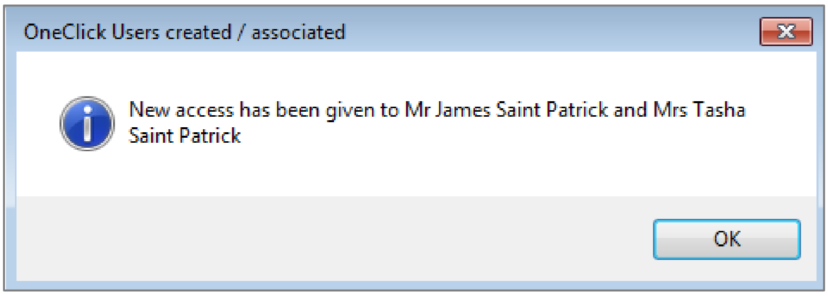


- From the list of associated contacts, select who will get access to the organisation's workspace and click **OK**
- At least one associated contact must be given access to the workspace when activating an organisation

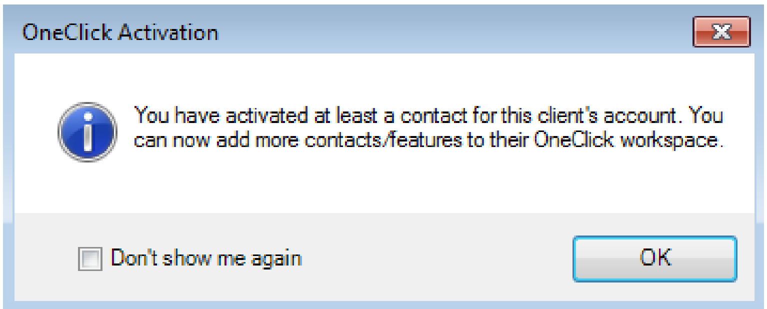
- Confirm your selection on the following screen:-



- Select OK



- Once access has been given to at least one contact, you can then add further features to their CCH OneClick workspace if required

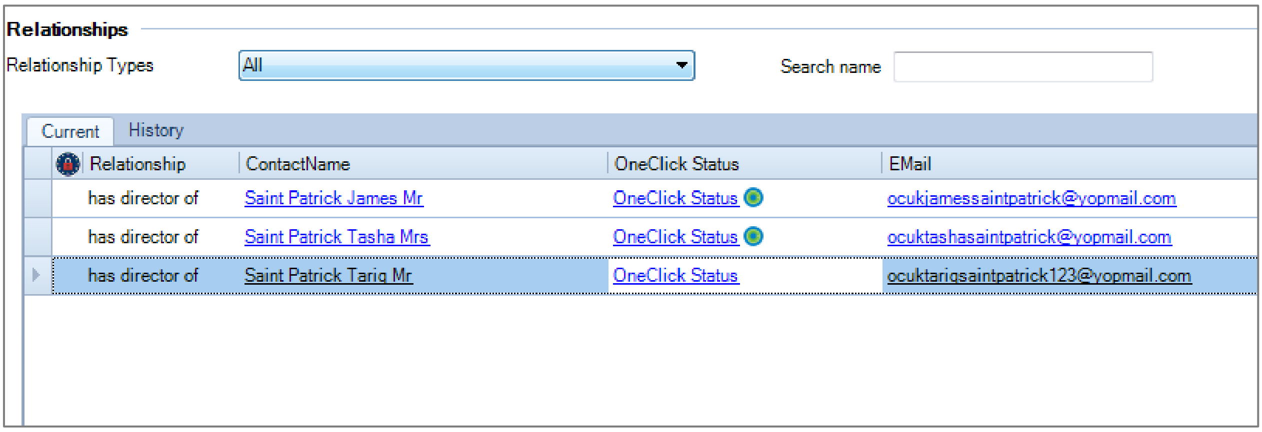


5.3.2 Associated contacts

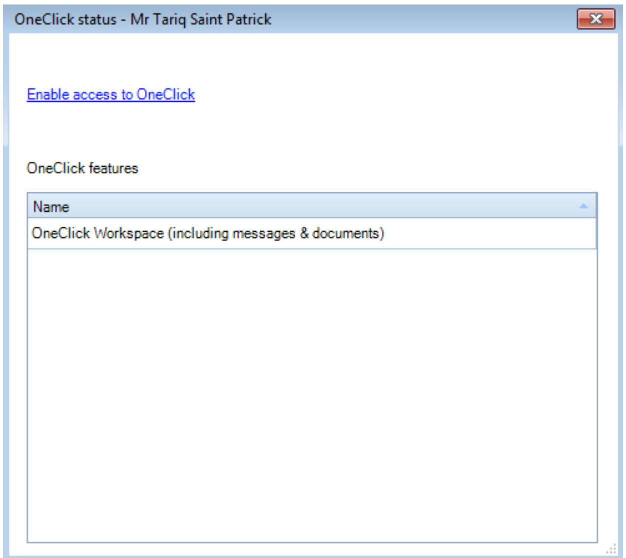
- The contact/client will receive an email informing them they now have additional access
- If the contact/client you gave access to is not already activated for CCH OneClick they will receive an activation email
- For associated individuals, the same email address will be used to access messages & documents for all relationships

5.3.3 Give access to additional contacts

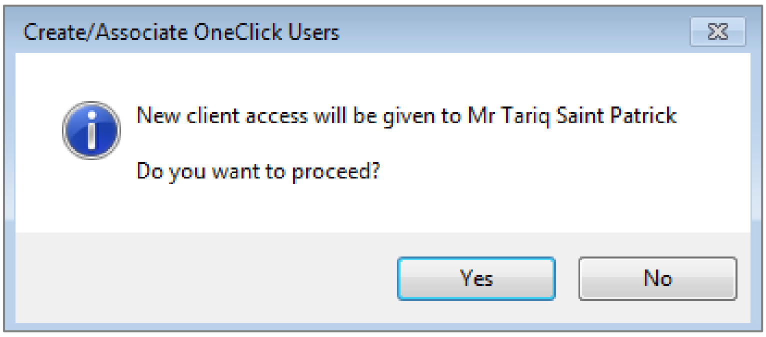
- If you want to give additional contacts access at a later date, select the OneClick Status hyperlink on the Organisation's associated tab



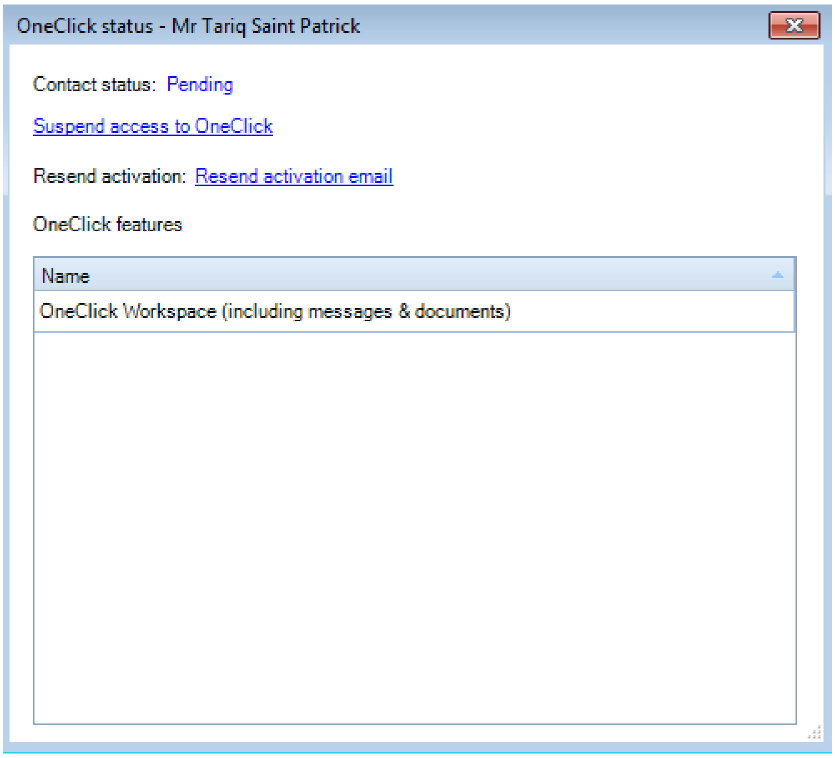
- From here, select **Enable access to OneClick**



- Choose **Yes** to enable access



- Their current status will show on this screen:-



5.3.4 Suspend access to CCH OneClick

- If you wish to suspend access to OneClick for a particular client, this can also be done through **the OneClick features** hyperlink within the client record