



Accountantspace User Guide

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Access to Accountantspace

Log onto your Charles Marcus portal page. On the top left hand side of the page under the CM logo there is a section names Favourites. Click the Personalize link.

Applications [Personalize](#)

Email
[Oracle Applications](#)

Favourites [Personalize](#)

Newsletters

Back issues of the Newsletter can be found [here](#)

Click the Personalize link

On the Edit Favorites Portlet Settings page click on **Add or Edit Favorites**

Add Or Edit Favorites

Click the link below to add, edit, move, or delete favorites or favorite groups in the Favorites portlet.

[Add Or Edit Favorites](#)

Click on Add or Edit Favorites

On the Navigate Favorites page click **Create Favorite**

Add your own favorites and favorite groups, or edit, delete, or move existing ones.

Actions [Create Favorite](#), [Create Group](#)

Click Create Favorite

On the Add Favorite screen enter the details for Accountantspace as shown. The URL required is <https://charlesmarcus.accountantspace.co.uk/>

Add Favorite

Specify a display name for your favorite, then enter its URL. If you wish, use the Description field to make notes for yourself about the favorite. The description is visible only when you use the Edit action.

Display Name

URL

Description

Enter Accountantspace

Enter the URL
<https://charlesmarcus.accountantspace.co.uk/>

Click Create. On the Navigate Favorites page click **Cancel**. On the Edit Favorites Portlet Settings page click **OK**

Applications [Personalize](#)

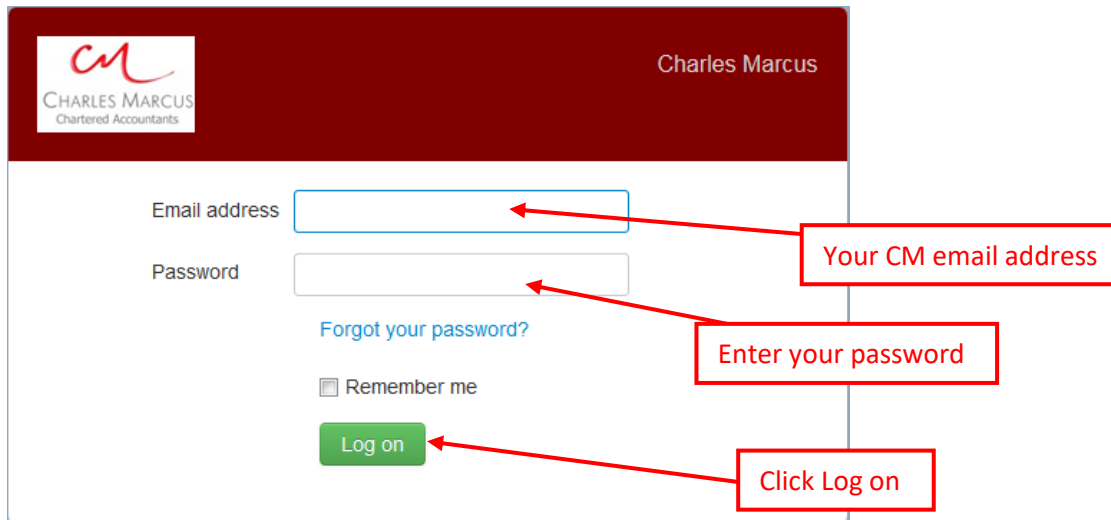
Email
[Oracle Applications](#)

Favourites [Personalize](#)

[Accountantspace](#)

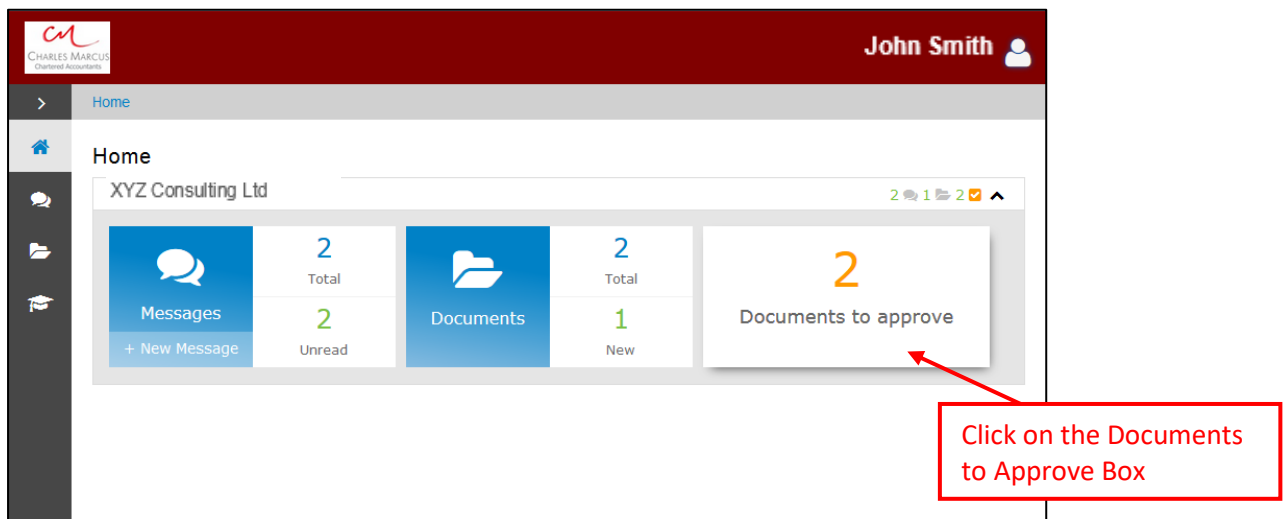
Return to the CM portal home page. Accountantspace appears. Click the link to open

The Accountantspace login page will open. Enter your Charles Marcus email address. Enter the password provided to you to access Accountantspace. Click Log on.



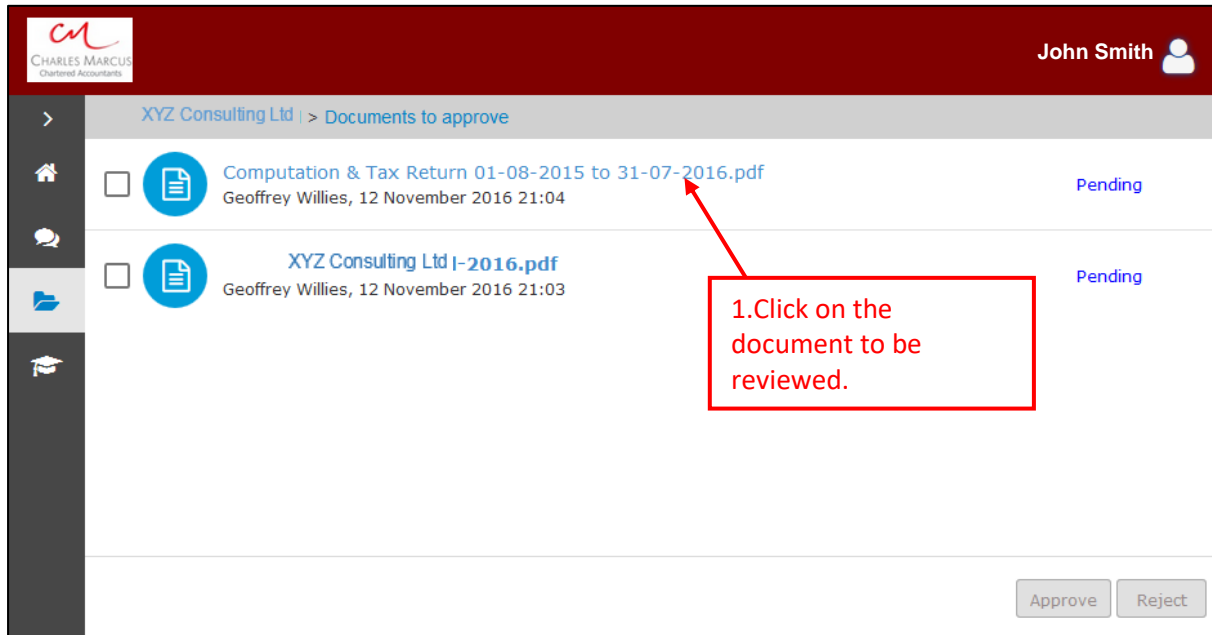
You will now have access to the Home page for your Limited Company. The home page shows the number of messages that may have been sent to you from Charles Marcus. It will also show all the documents processed including Company Accounts and Tax Returns. You can access any of these messages and documents whenever you need. You should read all new messages before looking at new documents.

If there are any documents that you need to approve then the Documents to Approve box will be displayed. Click on the Documents to Approve box.



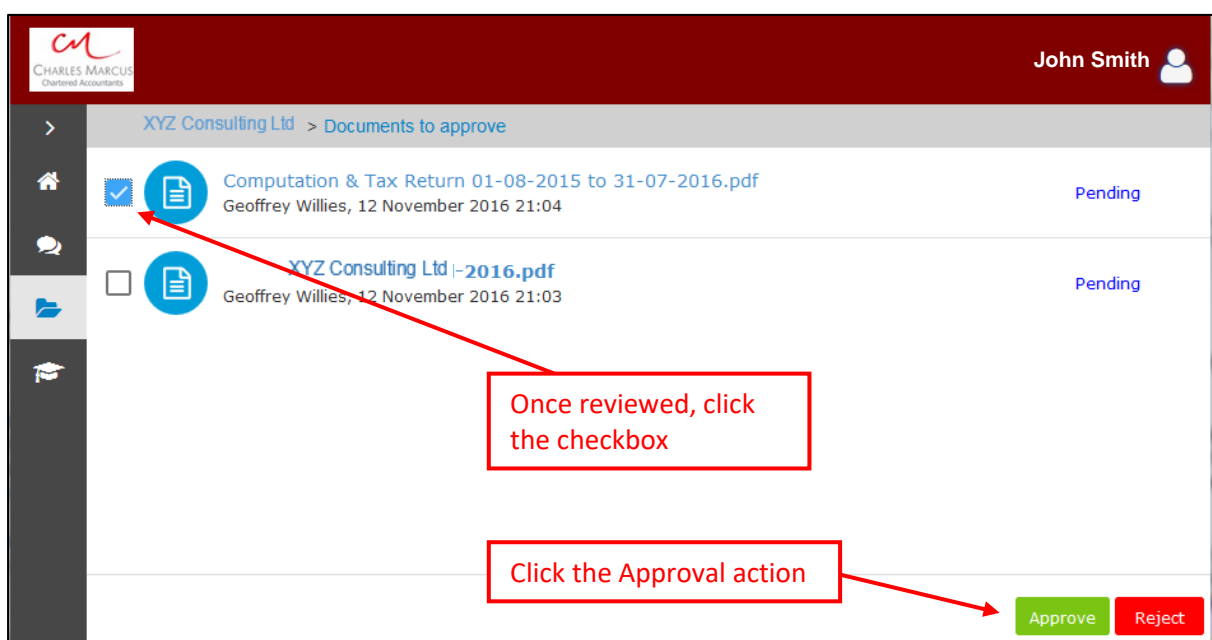
All documents that require your approval will be shown. They will show a pending status. You must review each document by clicking on the document link to open a PDF version of the document before you can approve or reject it.

Notice that the greyed Approve and Reject boxes in the bottom right hand corner. These will remain grey until you have reviewed at least one of the documents.



Once reviewed, check the box on the line reviewed and then select the Approve or Reject action required. The Approve and Reject button will become green and red as shown.

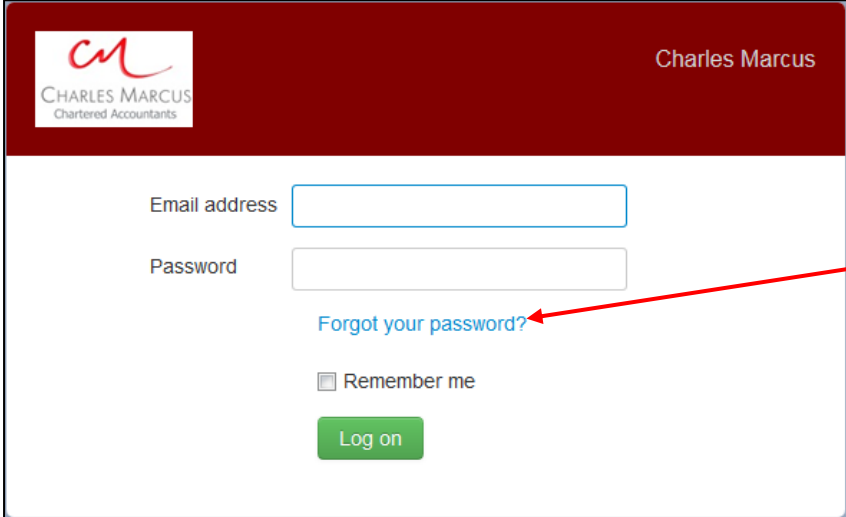
You can Approve all lines at one time by checking the box on each line before selecting the approval action or process just one document at a time as you need.



Change Accountspace Password

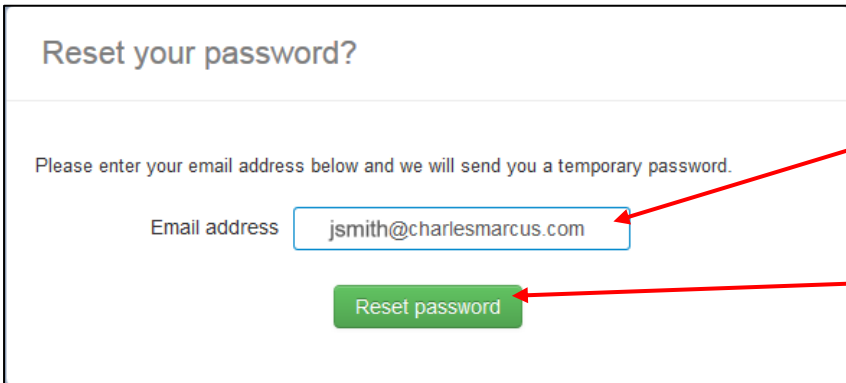
You are able to change your Accountspace password as needed or if you forget what it is.

To change the password, click on the **Forgot your password?** link on the logon page.



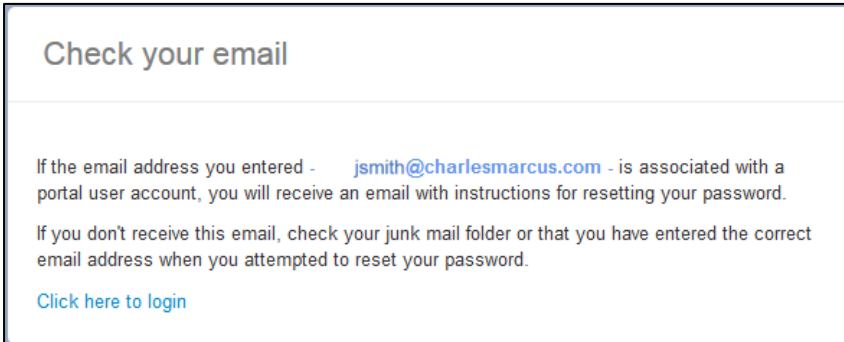
The screenshot shows the Charles Marcus login page. At the top left is the Charles Marcus logo (CM CHARLES MARCUS Chartered Accountants). At the top right is the name "Charles Marcus". Below the header are two input fields: "Email address" and "Password". Below the password field is a blue link "Forgot your password?". Below that is a checkbox labeled "Remember me" and a green "Log on" button. A red callout box on the right contains the text "Click on the **Forgot your password?** link" with a red arrow pointing to the link.

You will be asked to enter your email address so that a temporary password can be sent. Use your Charles Marcus email address then click Reset Password.



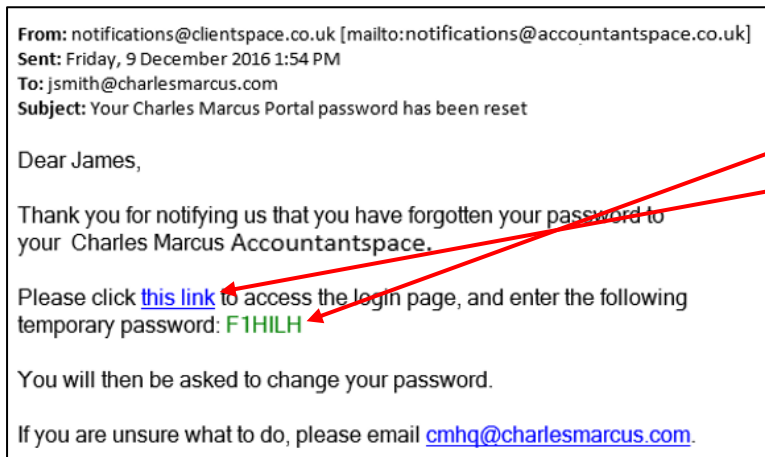
The screenshot shows the "Reset your password?" page. The title is "Reset your password?". Below the title is the instruction: "Please enter your email address below and we will send you a temporary password." There is an "Email address" input field containing "jsmith@charlesmarcus.com". Below the input field is a green "Reset password" button. Two red callout boxes on the right point to the input field and the button. The first callout box contains the text "Enter your Charles Marcus email address" and the second contains "Click **Reset Password**".

You will then be asked to check your email account. A message will be sent with a temporary password.



The screenshot shows the "Check your email" page. The title is "Check your email". Below the title is the text: "If the email address you entered - jsmith@charlesmarcus.com - is associated with a portal user account, you will receive an email with instructions for resetting your password." Below that is another line of text: "If you don't receive this email, check your junk mail folder or that you have entered the correct email address when you attempted to reset your password." At the bottom is a blue link "Click here to login".

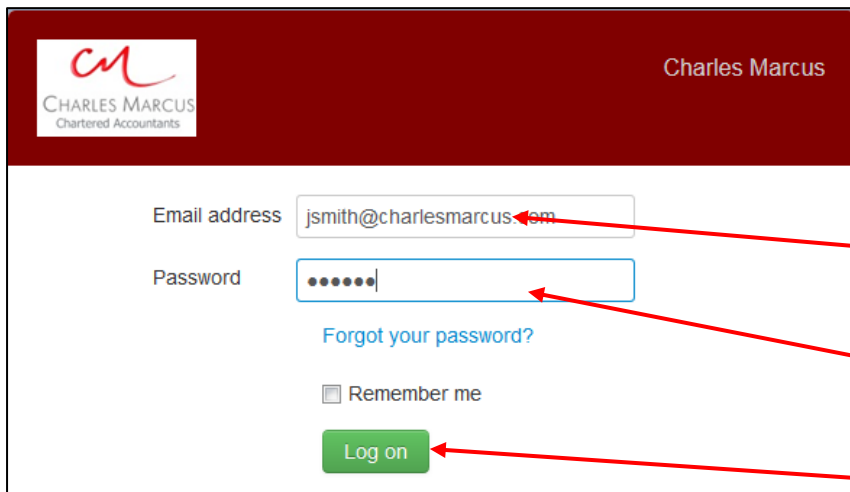
Take note of the temporary password included in the email. Click on the link in the email which will take you back to the Accountantspace logon page.



This is your temporary password

Click this link to return to the Accountantspace logon page

Enter your email address on the logon page along with the temporary password provided and click Log On

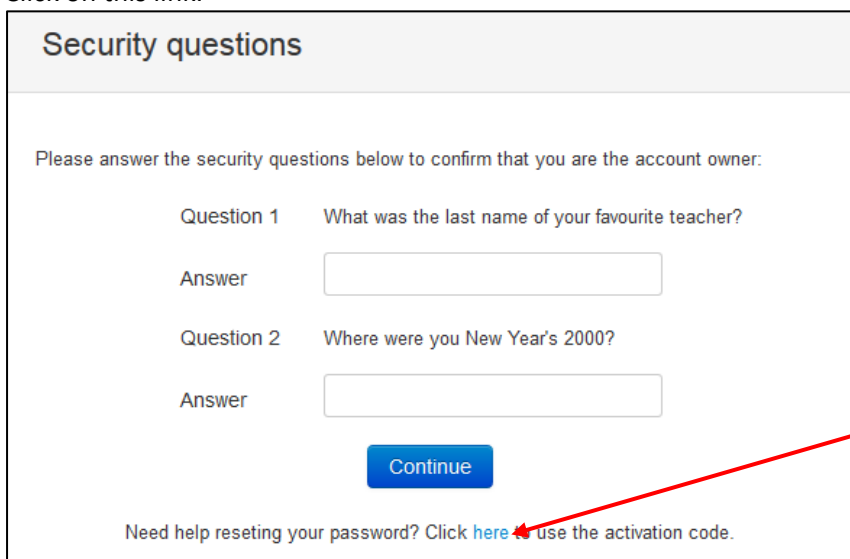


Your CM email address

Enter your temporary password

Click Log on

A Security Questions page will appear. Do not enter anything in the question fields. There is a link under the Continue button at the bottom of the page which allows you to use an Activation Code. Click on this link.



Click on the "here" link to use the activation code.

You will need your activation code. This will have been provided with your original email advising you how to connect to Accountantspace. If you do not have this code then you should email accounts@charlesmarcus.com.

Enter the code provided as shown (this is only a sample code) and click OK.

Charles Marcus

CHARLES MARCUS
Chartered Accountants

Welcome to Charles Marcus's portal activation screen. Please enter below the activation ID you have been given.

Activation ID

OK

Enter the Activation Code for your limited company

Click OK

Re-enter your temporary password that was emailed to you as shown on page 6 and then enter your new password. Be sure to follow the password criteria as shown on the page. Click OK.

Please create your own password

Thank you for activating your portal access. Please now enter a password which you should not reveal to anyone.
The password should:
- be at least 6 characters long.
- contain at least 1 number.

Temporary Password

Password

Re-enter Password

OK

Enter your temporary password

Enter your new password

Click OK

Your password has now been reset and you can continue to use the Accountantspace application.

Support

Should you have any difficulties with access, please email accounts@charlesmarcus.com