

# HOW TO CREATE A PORTAL ACCOUNT

## STEP-BY-STEP GUIDE

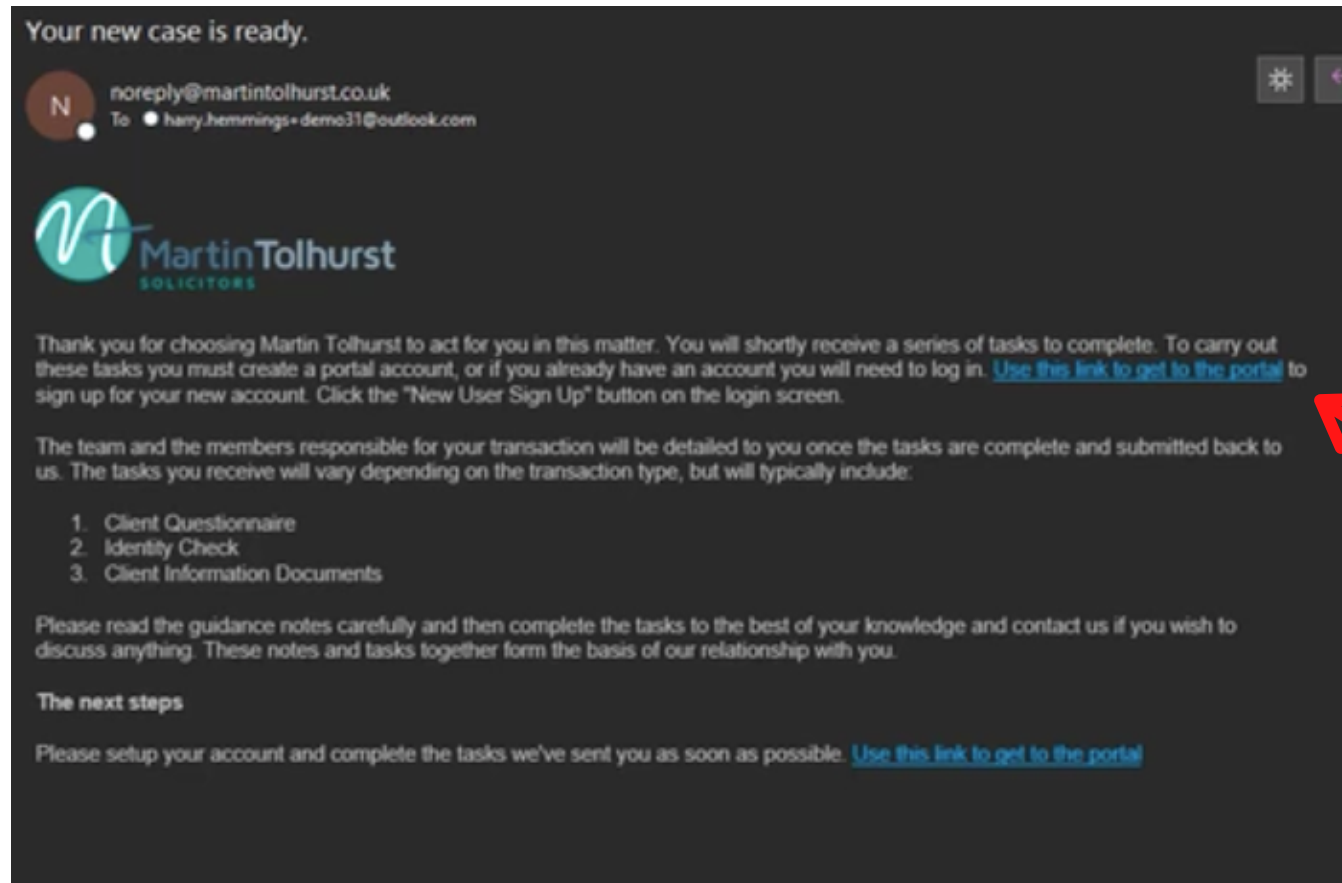


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You receive an email: this means your new case is ready. You click the 'New User Sign Up' button and the link will take you to the portal.



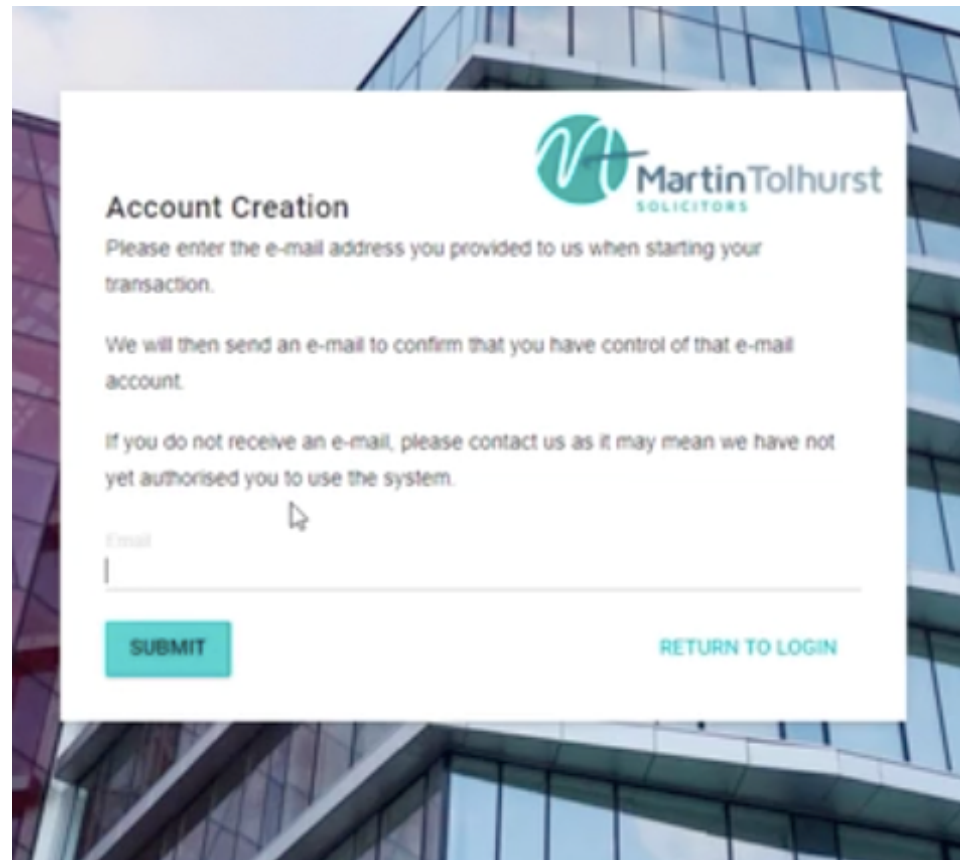
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Click 'New User' to set up your new account. It is important that you use the same email to which you received the 'your new case is ready' email.



The screenshot shows a web form for account creation. At the top right is the Martin Tolhurst Solicitors logo, which consists of a green circle with a white 'M' and the text 'MartinTolhurst SOLICITORS'. Below the logo, the heading 'Account Creation' is followed by the instruction: 'Please enter the e-mail address you provided to us when starting your transaction.' A paragraph follows: 'We will then send an e-mail to confirm that you have control of that e-mail account.' Another paragraph states: 'If you do not receive an e-mail, please contact us as it may mean we have not yet authorised you to use the system.' Below this is an email input field with a cursor icon. At the bottom left is a green 'SUBMIT' button, and at the bottom right is a green 'RETURN TO LOGIN' link.

**Account Creation**

Please enter the e-mail address you provided to us when starting your transaction.

We will then send an e-mail to confirm that you have control of that e-mail account.

If you do not receive an e-mail, please contact us as it may mean we have not yet authorised you to use the system.

Email

[SUBMIT](#) [RETURN TO LOGIN](#)

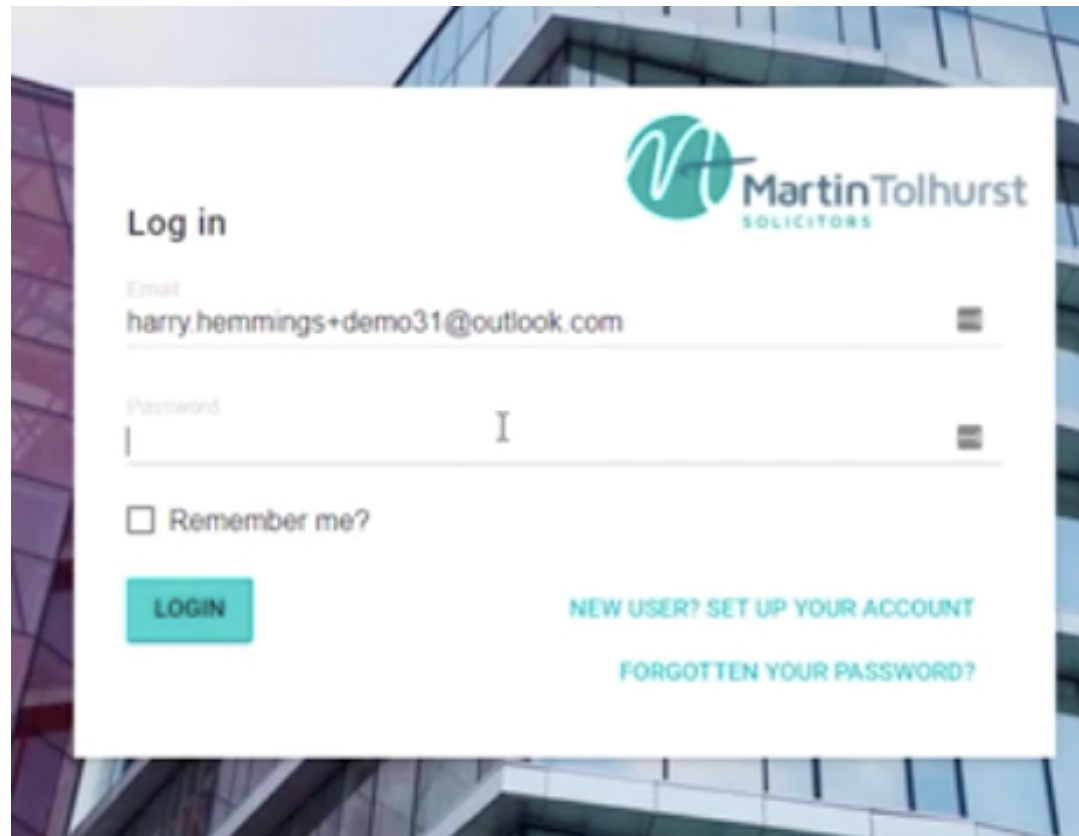


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You will need to verify your account ownership. You just need to go back to your emails, click the link and choose a password.



**Log in**



Email  
harry.hemmings+demo31@outlook.com

Password  
|

☐ Remember me?

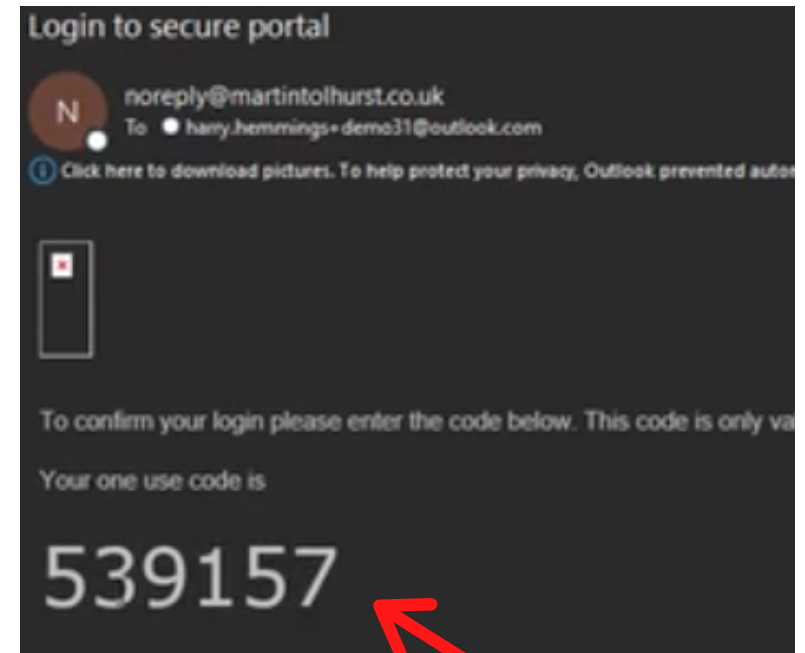
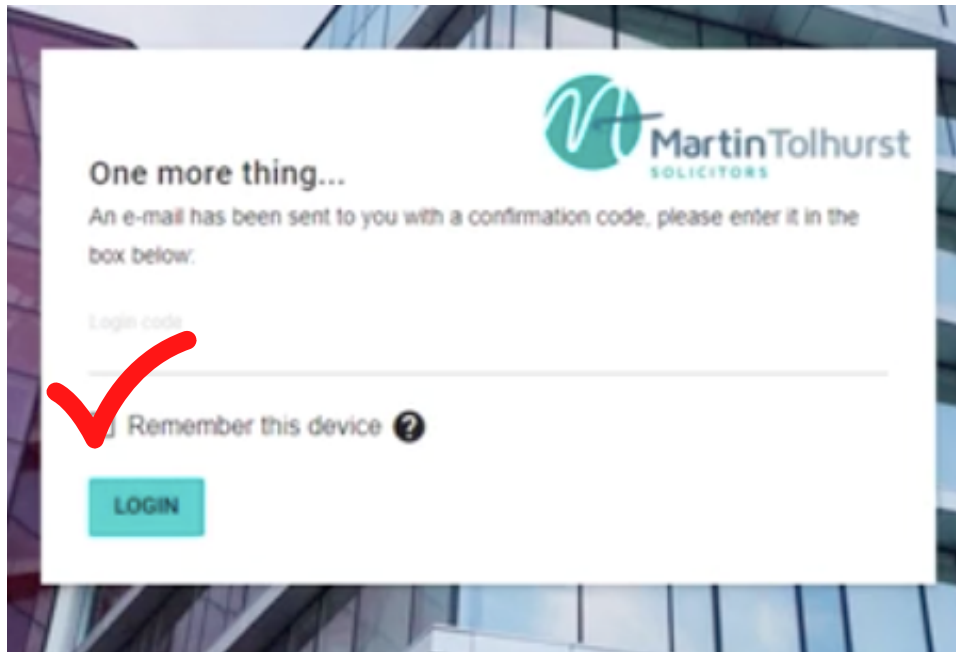
[LOGIN](#)

[NEW USER? SET UP YOUR ACCOUNT](#)

[FORGOTTEN YOUR PASSWORD?](#)



Every time you log in, you get sent a 2 factor authentication code (for security purposes). You'll find this in your inbox. If you click 'remember this device' you won't have to type that code again.



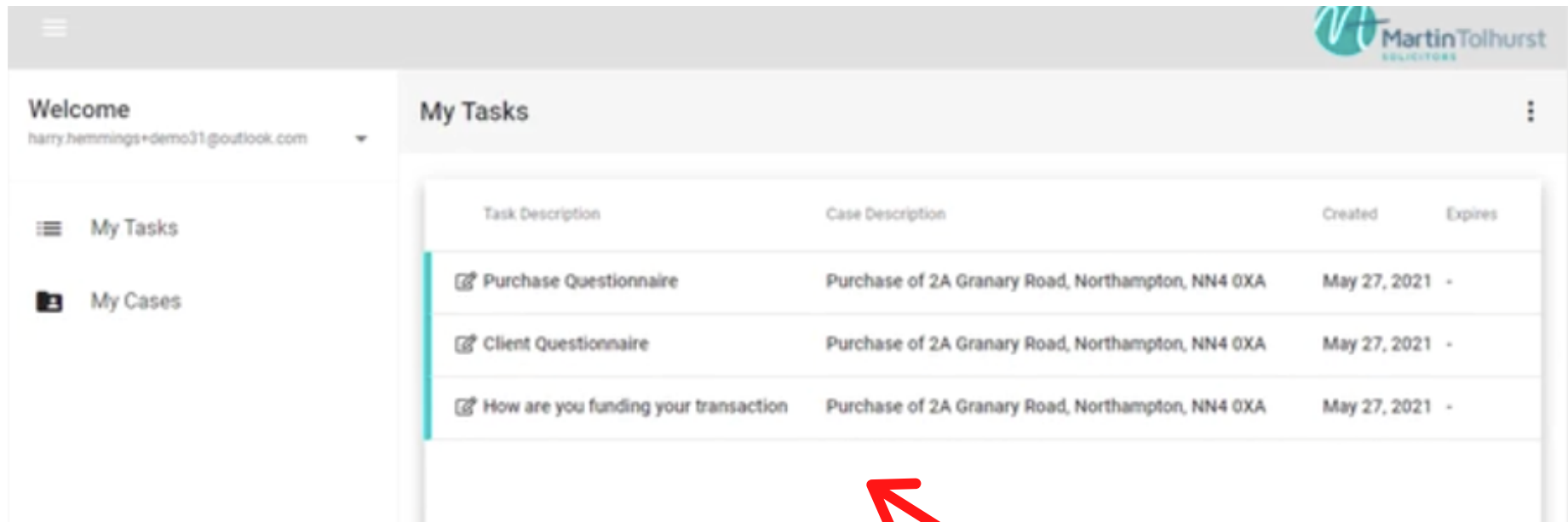
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We are now logged in to the Minerva Client portal.

Important: if you're struggling to fill out any of the forms or you don't know how to answer one of the questions, there are little blue boxes that you can click in the form that can give you some insight on how to answer.



Task Description	Case Description	Created	Expires
 Purchase Questionnaire	Purchase of 2A Granary Road, Northampton, NN4 0XA	May 27, 2021	-
 Client Questionnaire	Purchase of 2A Granary Road, Northampton, NN4 0XA	May 27, 2021	-
 How are you funding your transaction	Purchase of 2A Granary Road, Northampton, NN4 0XA	May 27, 2021	-

Your task list

It's the same process  
for every single form.



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## Client Questionnaire

The first thing you will see when you open up this form is an information panel which will give you some instructions on how to fill out this form. Then click continue.

Client Questionnaire

1

Important Information

be encrypted.

It is important that we can communicate with you effectively. If English is not your first language, please let us know if you need an interpreter to help you understand. If you have trouble understanding written English, please let us know. If you are blind or rely on someone else to read our letters and emails to you, please let us know. If you are going to have difficulty if we call you by telephone, please let us know.

- **Contact Details/Client Information**

It is very important that we have accurate and complete details of all of our clients. We need your full names (family name, first name and any middle names), dates of birth, contact telephone numbers and, if you are happy for us to contact you by email, email addresses.

If we telephone you or you telephone us, we need to make sure you are who you say you are. Please be aware we may ask you security questions before answering any queries about your matter.

- **Proving your Identity/Bank Details**

We have to be able to establish that you are who you say you are in order to comply with our statutory obligations, including Money Laundering Regulations.

If you are a company please let us know.

During the course of our dealings you may need to pay money to us or we may need to pay money to you. Please provide us with details of a main bank account, in your name. Having provided details of a main bank account it helps if money you send to us comes from this account but your conveyancer can provide further advice in due course. If, at the end of a transaction, we have money to send to you we may transfer your money only to this account.



Please note: any questions you see with a red exclamation mark are mandatory! You will not be able to submit the form if you leave these questions blank.

So the first section is Martin Tolhurst Term of Business. You click the link and this will take you to their website.

The screenshot shows a 'Client Questionnaire' form with a sidebar on the left containing six sections: 1 Our Terms of Business, 2 About You, 3 Contact Details, 4 Additional ID Information, 5 Wills, and 6 Declaration. The first section, 'Our Terms of Business', is selected and contains the text: 'Our full terms of business are available on our website. [click here](#)'. Below this text is a mandatory question marked with a red exclamation mark icon: 'I have read and agree to the terms of business'. A red arrow points from the text 'I have read and agree to the terms of business.' to this question.

I have read and agree to the terms of business.



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## 8

The second section is about you - title, name, surname, nationality, occupation. If this is a joint client, you would have to fill in all the details on behalf of the second client as well.

Is this a joint client?  
☒ Yes ☐ No

☐ I confirm that I am authorised to complete this form for the other parties mentioned.

**Second Person**

☐ Has this person been known under a different name within the past 5 years  
☐ Yes ☐ No

The forms are very dynamic, so depending on what answer you pick for a question it will ask for more questions as a result.



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Additional ID information: Martin Tolhurst asks you to upload two different items from the list you see here. You click 'Upload Now' and you'll be able to drag and drop your files into the box, or select the documents from your computer.

**Additional ID Information**

In order to comply with the requirements of our regulator (The Solicitors Regulation Authority), **we need two forms of identification from you that show your name and address.** Any bills/statements should be dated within the last 3 months and show both your name and address. This is needed for each person.

The following documents are acceptable here: –

- Utility bills from service provider
- Bank statement or mortgage lender statement.
- Council Tax bill for the Property
- Buildings and Contents Insurance policy schedule for the property
- Statement from savings provider such as bank or building society.
- Official HMRC correspondence within the last 3 months (not a P45 or P60).
- Mobile or landline telephone bill (must show your address).
- Current valid Shotgun licence.

Please upload two items from the list above for each person in the transaction.

**Upload Now**

☐ Please tick to confirm that you have uploaded all of the required documents.



At the end you will see the message 'Two documents have been uploaded'

**Upload Files**

Drop files here or click to select files

Files to Upload

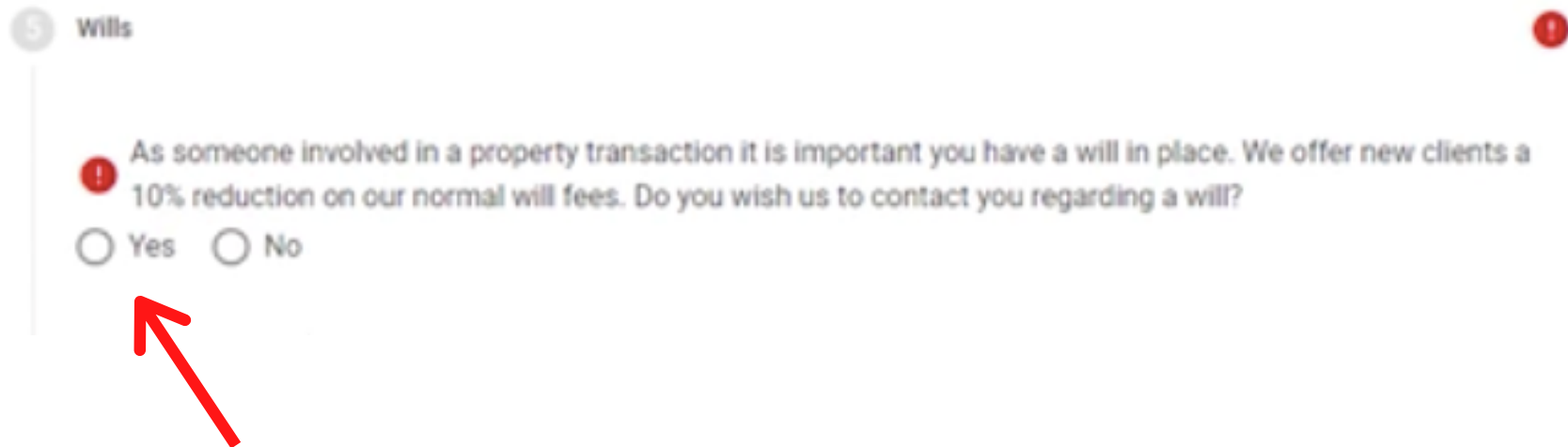
summary (23).pdf (23.5 KB)

Total Files: 1 Total Size: 23.5 KB

Upload All Close



Wills - Martin Tolhurst offer new clients a 10% reduction on their normal will fees. If you would like to be contacted regarding a will, click 'Yes'.



5 Wills

As someone involved in a property transaction it is important you have a will in place. We offer new clients a 10% reduction on our normal will fees. Do you wish us to contact you regarding a will?

☐ Yes ☐ No



Almost done - Declaration: to ensure everything you said is true and accurate. Once you click next, a summary document will be produced.

6 Declaration ✓

Is there any other information about you that you would like to share please enter below.

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✓ ☒ Please Tick here to confirm the above information is true and accurate and that you are duly authorised to complete the questionnaire.

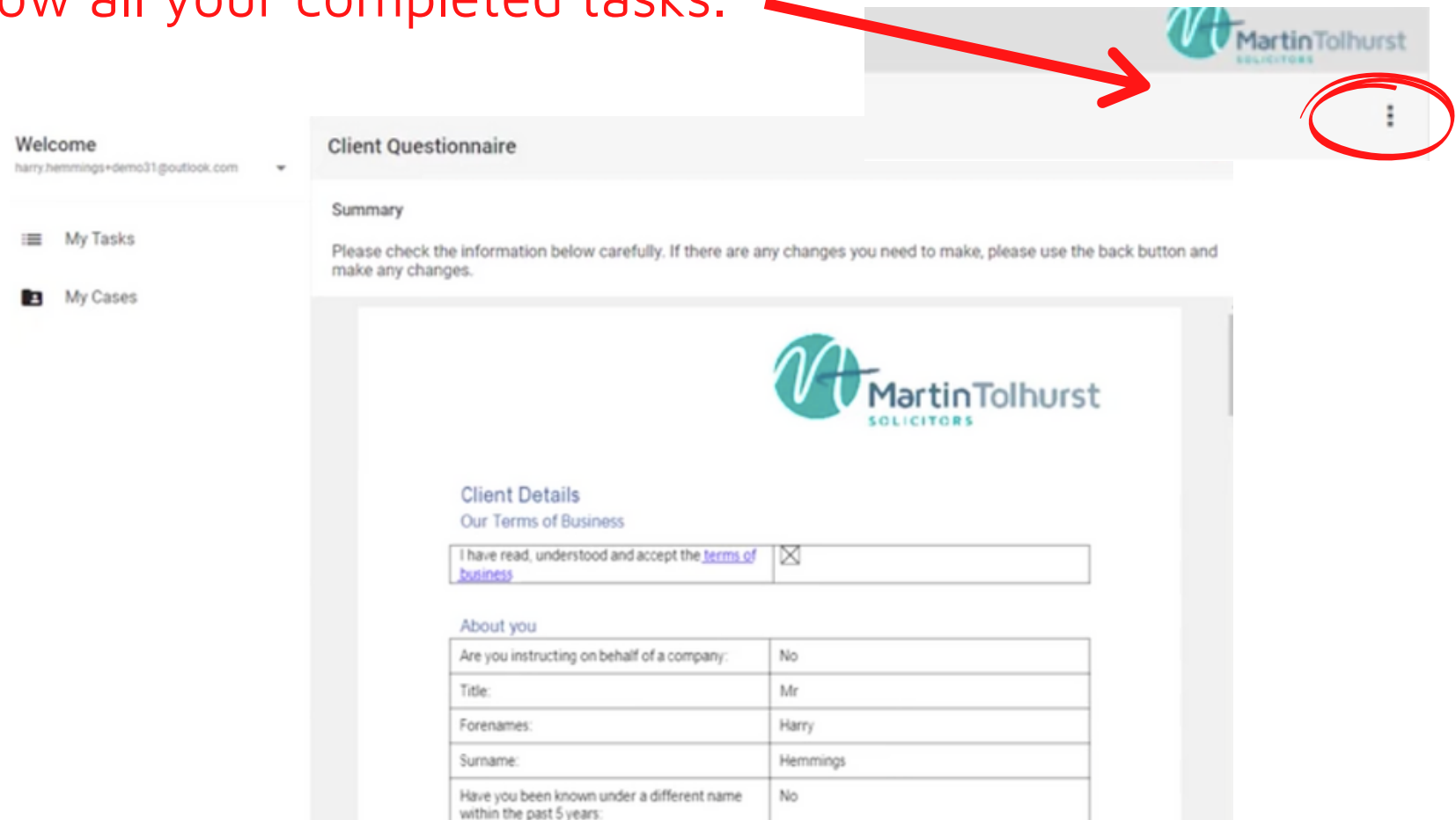
✓ ☒ Please tick here to confirm that you have read and understood the important information about sending funds to us, including the requirement to ring us before sending funds and that we do not provide bank details by email.

✓ ☐ I consent to Martin Tolhurst adding my/our personal data to their legal services database and that they will use this database from time to time to market legal services to me. I understand they will not share my data with others for marketing purposes.



You can download the form and save it if you wish. And then you simply go 'Finish' and the Client Questionnaire will disappear from your task list.

You can always press the three dots on the right hand corner and show all your completed tasks.



The screenshot shows the 'Client Questionnaire' form in the Minerva Client Portal. The form is titled 'Client Questionnaire' and includes a 'Summary' section with instructions: 'Please check the information below carefully. If there are any changes you need to make, please use the back button and make any changes.' The form is divided into two main sections: 'Client Details' and 'About you'.

**Client Details**  
Our Terms of Business

I have read, understood and accept the [terms of business](#) ☒

**About you**

Are you instructing on behalf of a company:	No
Title:	Mr
Forenames:	Harry
Surname:	Hemmings
Have you been known under a different name within the past 5 years:	No



This is a demonstration on how the Minerva client portal works.

Now that you have completed your client questionnaire, you will be asked to perform an ID check. You would receive this notification via email.

Any questions you may have about how to use this client portal, please feel free to get in touch.

Thank you.



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