**How Now Instructions**

Accessing the Portal and Setting up your Account

- click link that has been sent to you advising you have been added/invited to access a client and associated documents

- Your email address is your username and you will need to enter a password and confirm password to create your account

- You can now access the portal and any documents you have been sent

- Future documents you can access directly by going to our website and logging in to the portal from the home screen using your email address and password or if you receive an email advising of a new document available for viewing you can click the link provided in the email and it will take you directly to the page – you will need to log in again however.
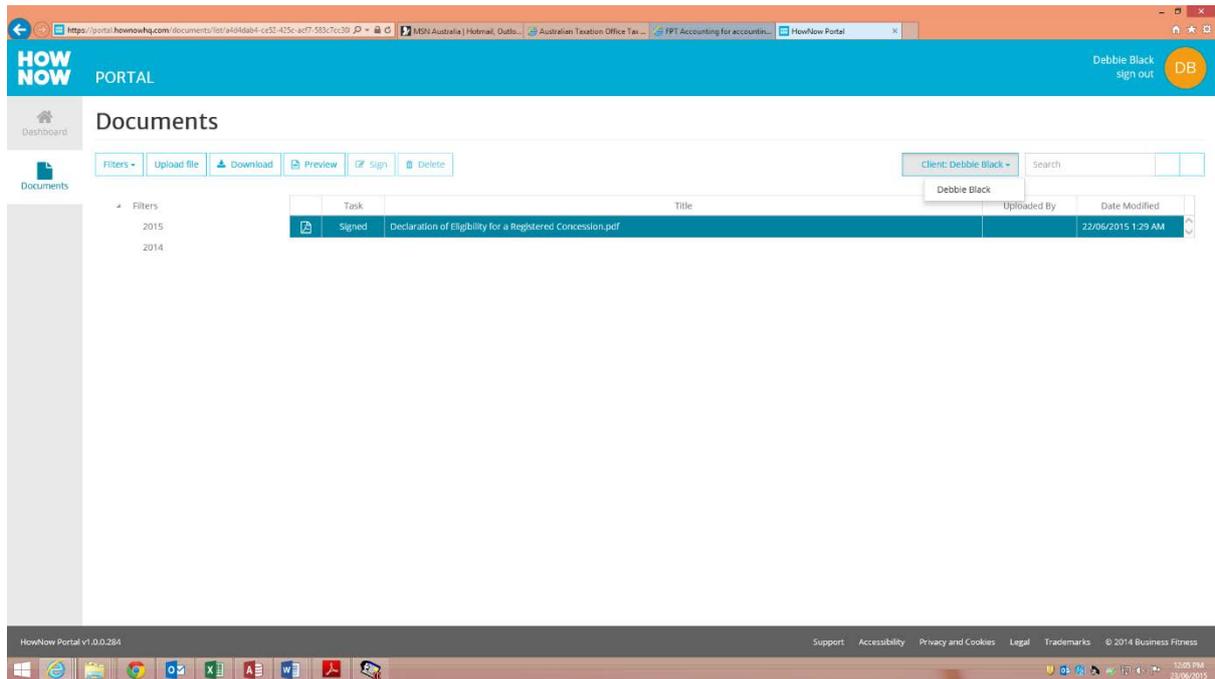
Accessing Documents

- Once you have signed in your will be taken to the dashboard. Here is where you see all the activity on your account. Any documents uploaded for viewing or signing will be here as well as any actions you have completed
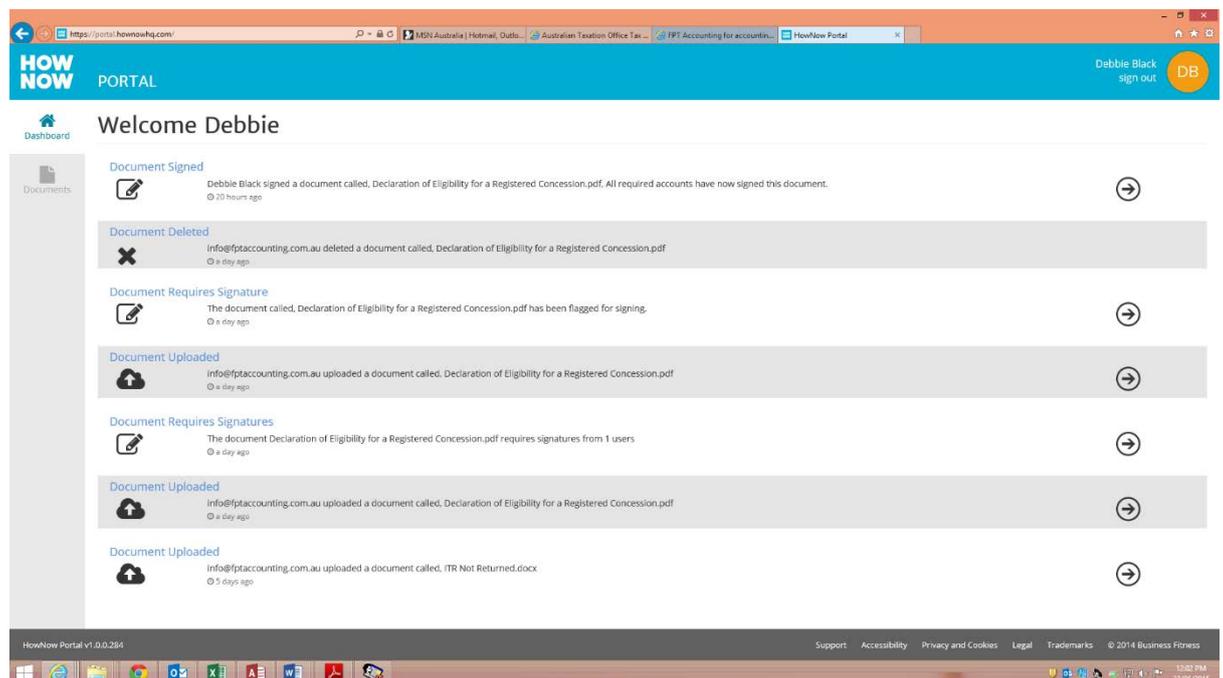
- To view or access a document you can click on the arrow related to that document on the dashboard. You will be taken to the location of the document.

- Click the document and then click the action above which you would like to complete for that document i.e upload file, download, preview, sign or delete.

- On the left hand side there is a search bar where you can search for the name of a document. To the left of this is a drop down menu where you can view the other

clients/related entities you have access to. Changing the client here will bring up that said clients documents.

- Documents will also be allocated 'filters' You can see the list of filters on the left hand side of the screen. Clicking these will bring up only the associated documents with that filter

Signing Documents

- click documents tab on the left hand side

- click the document you have been asked to sign and click the sign button above

- enter the pin code which was sent to your email and click confirm

- The places where you need to sign and date will have a red border around them – click on the box

- Delete the word anonymous and type in your name and then click on the font and colour underneath that you prefer

- Where a date needs to be added click the box and set the date you have signed

- Click confirm signature and a box will come up asking you to enter your name and details, these are already there you just have to click continue

- Are you sure you want to sign this document? – click yes or if you have made a mistake click no and it will take you back

- After you click yes your document will show on the screen signed and you will be able to see your signature at the bottom of the page

- You can now click close in the top right hand corner – your Tax Agent will receive an email confirming you have signed the document.

Downloading Documents

- To download documents for yourself click documents on the left hand side of the screen

- Click on the document and then click download

- The document will then show at the bottom of your screen – you can click on this and it will open. The document will also be in your downloads folder in my computer.

Upload a File

- To upload a file for your tax agent click into documents

- Click upload file

- Choose the file you want to upload and hit open

- An upload screen will open showing the progress of the upload – when this closes it means your upload is successful and the document will show in the documents section of the portal