



# Client Portal 2019 User Guide

## Logging in as a Portal user

You can log into the Client Portal from any location via a web browser.

1. Click on the link in the activation email to open the Client Portal Login page.

2. Type in your Client Portal **User Name** or **Email Address** and **Password**, and click **Login**.

If you forget your password, you can reset it by clicking **Forgot Password** on the Login page.

- On the Reset Password page, enter your accountant's Practice ID and your email address, and click **Reset**.

**Note:** An Admin User login could have the same email address as a Portal User login; therefore, if you are resetting an Admin User's password, ensure that the **Admin email?** check box is selected.

If you are resetting a Portal User's password, clear the **Admin email?** check box.

An email will be sent to you containing a link to the password reset page.

If the **User name** and **Password** you used is linked to more than one Portal user, the [Select Portal Area](#) page will open.

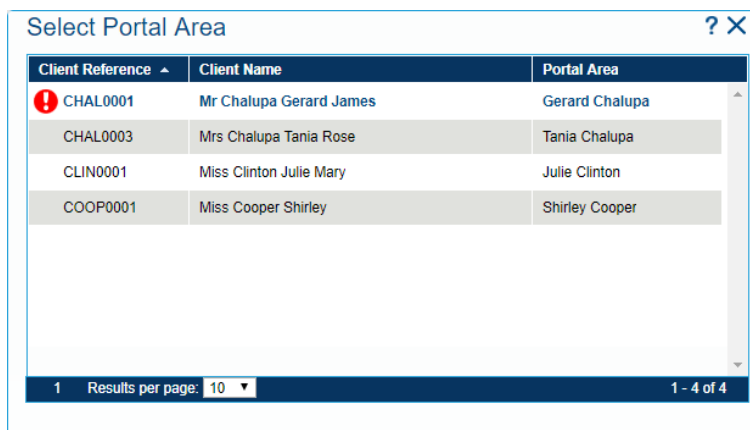


Figure 2: The Select Portal Area page

**Note:**  indicates that the Portal Area has unread documents.

- Click on the Client Portal area you want to open.  
The [Client Portal Document Listing](#) page will open.

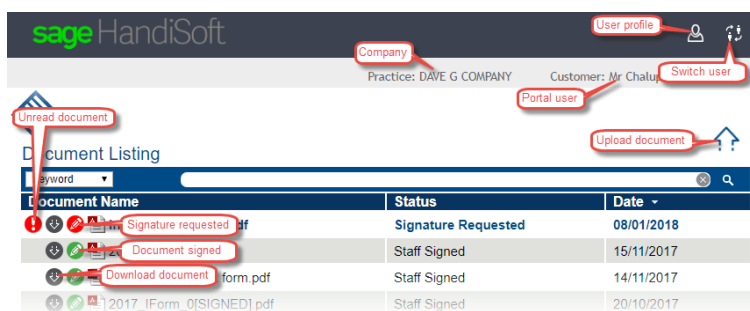




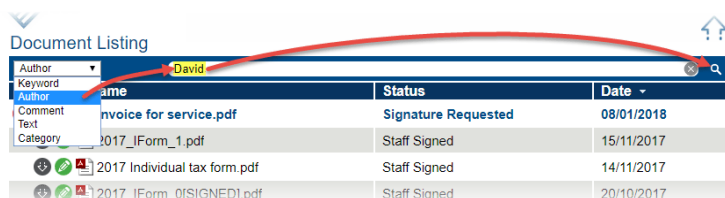


Figure 3: The Document Listing page

The Document Listing page lists the documents that have been uploaded to the Client Portal, and indicates their statuses as follows:

-  The document has not been read
-  The document needs to be signed
-  The document has been downloaded
-  The document has been signed

- You can search for a document by selecting a search object, entering search text, and clicking .



The documents matching your search text will be listed.

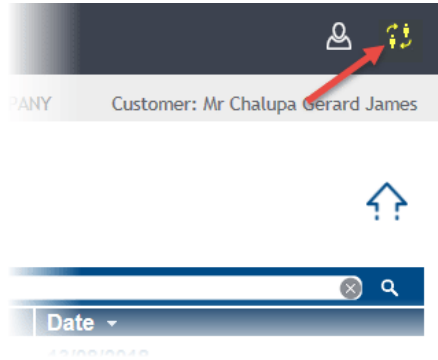
- To clear your search text, and display all the documents, click the cross as shown below.



### Switching to another Portal User

If the **User name** and **Password** you used is linked to more than one Portal user, you can select another user's Portal area.

1. On the [Client Portal Document Listing](#) page, click **Switch Users** .



2. On the [Select Portal Area](#) page, click on the required Portal user.

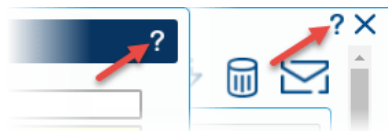
Client Reference	Client Name	Portal Area
CHAL0001	Mr Chalupa Gerard James	Gerard Chalupa
CHAL0003	Mrs Chalupa Tania Rose	Tania Chalupa
CLIN0001	Miss Clinton Julie Mary	Julie Clinton
COOP0001	Miss Cooper Shirley	Shirley Cooper

1 Results per page: 10 1 - 4 of 4

Figure 4: The Select Portal Area page


### Accessing on-line help

You can access on-line help by clicking **?** in the top right corner of the Client Portal pages.



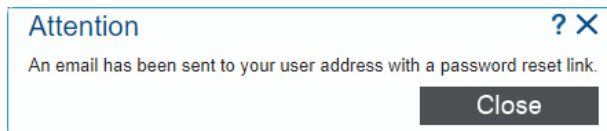
### Viewing your User Profile and resetting your password

You can view, but not edit, your Client Portal User profile.

1. Log into the [Client Portal Document Listing](#) page.
2. Click  on the top right to open the “User Profile” window.



3. If you want to change your password, click **Reset Password**.



You will receive an email with a link to reset your password.

### Uploading documents

It is possible to upload documents to the Client Portal from any location via a web browser.

1. Log into the [Client Portal Document Listing](#) page.

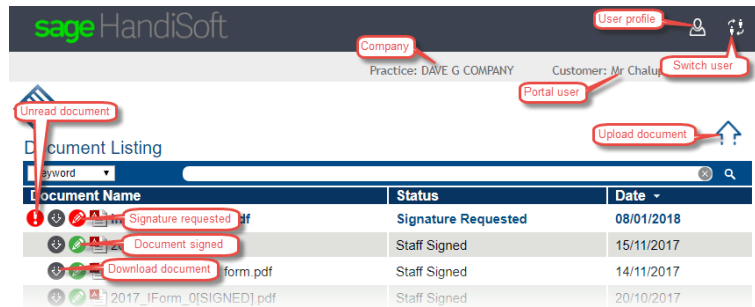
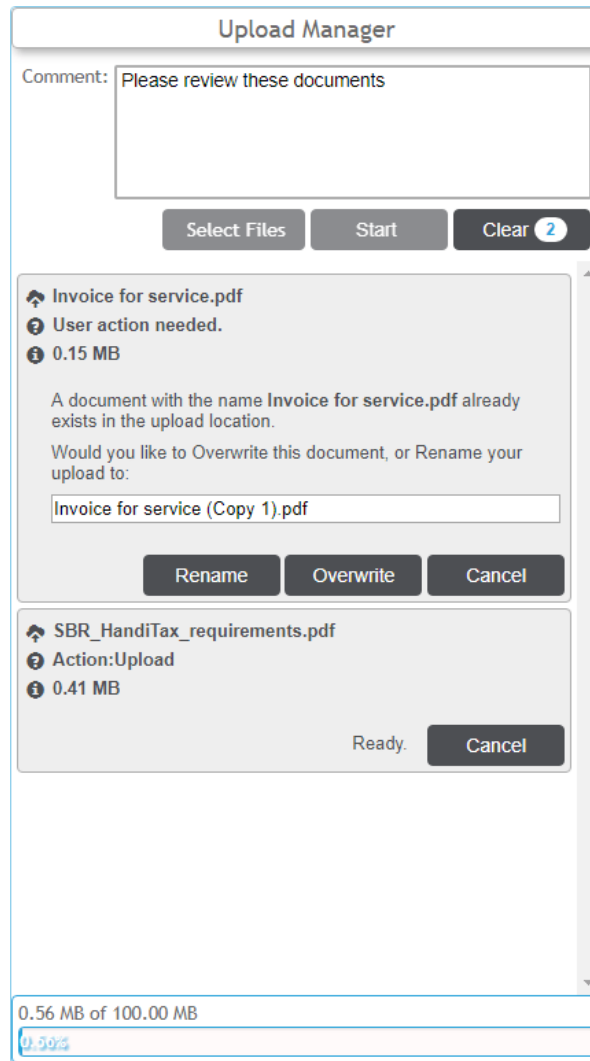
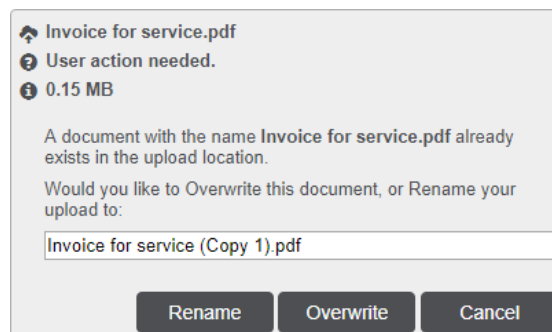


Figure 5: The Document Listing page

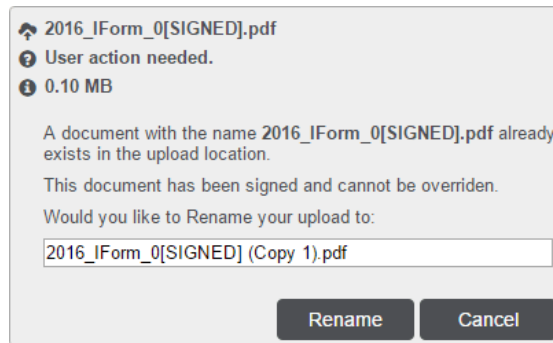
2. To upload documents to the Client Portal, click  to open the “Upload Manager” window.



3. Click **Select Files** to select the document files to be uploaded.
4. On the “Open” window, you can use the **Ctrl** and **Shift** keys to highlight multiple files. Click **Open** to select them.
5. The “Upload Manager” window will list the document files to be uploaded.
  - To remove all the files from the upload list, click **Clear**.
  - To remove individual files from the upload list, click their **Cancel** buttons.
6. If a document has already been uploaded, but not signed, you will be given the choice of either renaming it or overwriting it.



7. If a document has already been uploaded and signed, it cannot be overwritten. You can either rename it or cancel its upload.



8. If necessary, in the **Comment:** box, type in a comment about the documents to be uploaded.

9. Click **Start** to upload the documents to the Client Portal.

The documents will be added to the Document Listing page, with a **Status** of 'Document Uploaded'.

Your accountant will receive an email message informing them of the event.

**The following document(s) have been uploaded to the Client Portal System:**

Uploaded By: Gerard Chalupa (CHAL0001)

Author: Gerard Chalupa

Document(s):

Important document.pdf

502904031329994963.pdf

Comment:

Please review these documents

Kind Regards,

Gerard Chalupa

## Assigning a category to a document

You can categorise documents in the Client Portal, to enable filtering for searches.

1. Log into the [Client Portal Document Listing](#) page.
2. Click on the document to which you want to assign a category, to open the "[Document Details](#)" window.

**Document Details**

Name: 2018\_IForm\_1.pdf

Category Name:

Author: DAVID.GRIEVE

Current Status: Reminder Sent

Status Date: 05/02/2018

Date Uploaded: 10/01/2018

Size: 101.25 KB

Locked: Document is unlocked and can be deleted

Mark as Unread:

**+ Document History**

**- Signature Request**

Signature Requested: Yes

Downloaded:

Signed:

Signed by Staff: Not Required


Reminder Sent: 05/02/2018

Rejected Date:

**- Comments +**


Date	Time	Comment	User
10/01/18	16:05	Please sign at your earliest convenie.	DAVID.GRIEVE

Figure 6: The "Document Details" window

- To assign a category to the document, click  next to the **Category Name** field.

**Document Details**

Name: Invoice for service.pdf

**Category Name**:  

Author: DAVID.GRIEVE

- In the "Categories" window **Category Name** field, either select an existing category or type in a new one.

**Categories**

Category Name: Administrative

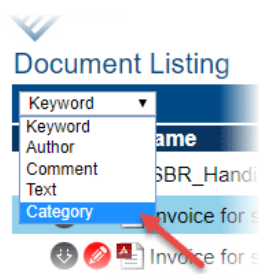
- Administrative
- General document

Select Cancel

- Click **Select** to assign the category to the document.

When you search for a document, you can select a category to search on.





### Viewing and signing a document

Once a request for signature has been issued, you will receive an email with instructions for downloading and signing the document.

Do the following to view and sign the document.

1. Click on the link in the email to open the Client Portal Login page.

**Login** ?

Accountant's Practice ID

User Name/Email Address

Password

Remember me

[Forgot Password](#)

**Login**

2. Type in your Client Portal **User name** and **Password**, and click **Login** to log into the [Client Portal Document Listing](#) page.

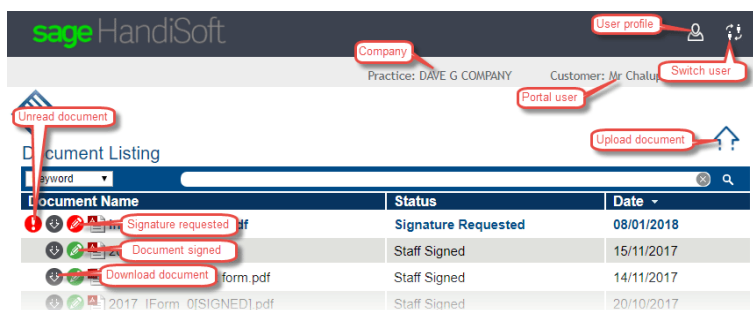


Figure 7: The Document Listing page

3. The document requiring a signature is marked by . Click on it to open the “[Document Details](#)” window.

The **Signature Requested** field will show that a signature has been requested for the document.

[-] **Signature Request**

Signature Requested


Downloaded

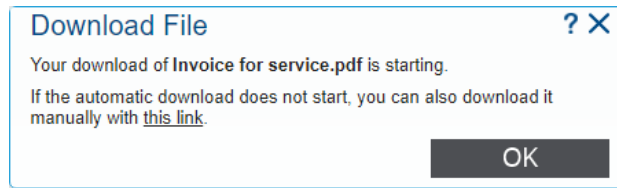
Signed

Signed by Staff

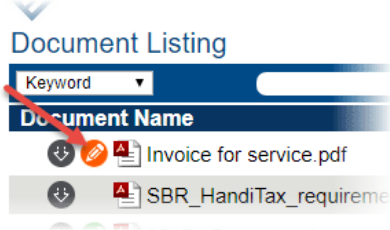
Reminder Sent


Rejected Date

4. Before you can sign the document, click  to download it.
5. Click **Ok** to the Download File message.



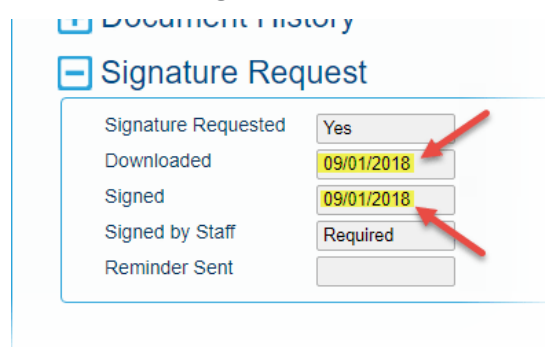
**Note:** The colour of the **Signature Request** icon changes to orange to indicate that the document has been downloaded.



6. After viewing the document, you can click  to sign it.
7. On the “Electronic Signature” window, click **Sign Document**.



The “Document Details” window, **Downloaded** and **Signed** fields will show the dates that the document was downloaded and signed.



Your accountant will receive an email informing that the document has been signed.

The following document in the Client Portal System has been signed:

Document: 2017\_IForm\_0[SIGNED].pdf  
 Signed By: Gerard Chalupa  
 Downloaded: 18/10/2017  
 Signed: 18/10/2017

Kind Regards,

Gerard Chalupa

### Viewing and adding comments on a document

You can view and add to a list of comments on Client Portal documents.

1. Log into the [Client Portal Document Listing](#) page.

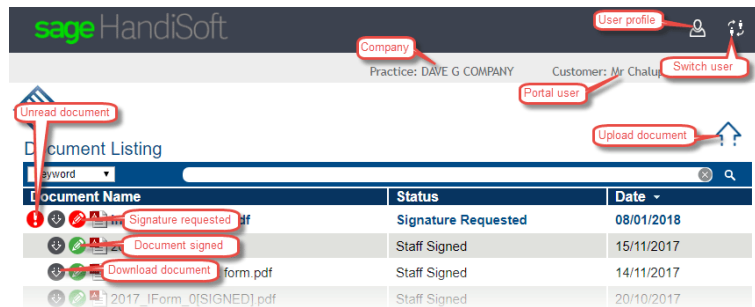

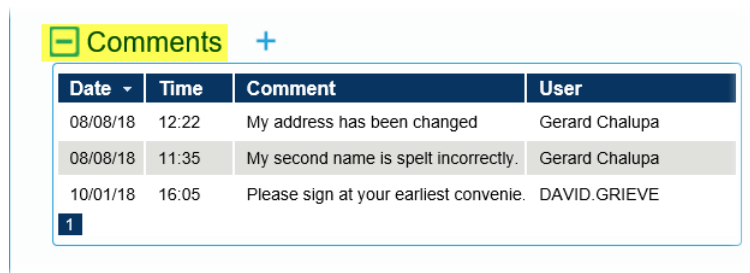

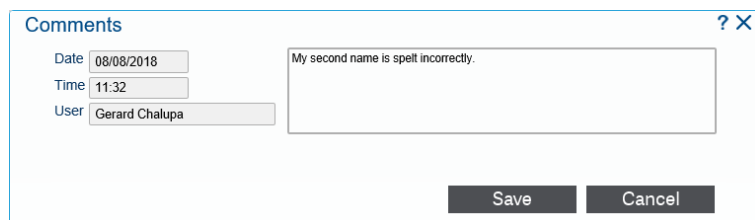


Figure 8: The Document Listing page

2. Click on the required document to open the ["Document Details"](#) window.
3. To view existing comments on the document, click  to expand the **Comments** section.



4. You can click on any comment to view its contents.
5. To add a comment, click  to open the "Comments" window.



6. Type in your comment, and click **Save** to add it to the list.

The Client Portal sends an email to the document owner, informing that you have added a comment.

**Document Comment**

A comment has been created for the following Document on the Client Portal:


Document: 2018\_IForm\_1.pdf  
 Uploaded By: David G  
 Author: David G  
 Comment By: Gerard Chalupa  
 Comment: My second name is spelt incorrectly.

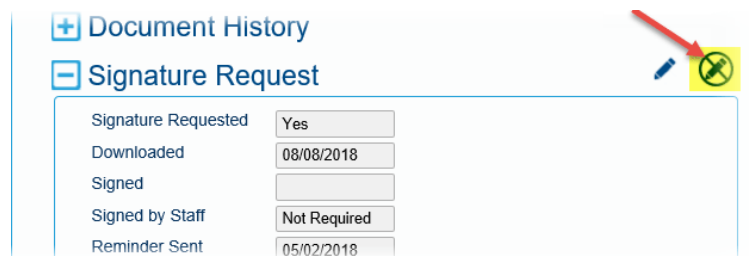
**Rejecting a signature request**

You can reject a signature request for a document and provide a reason for doing so.

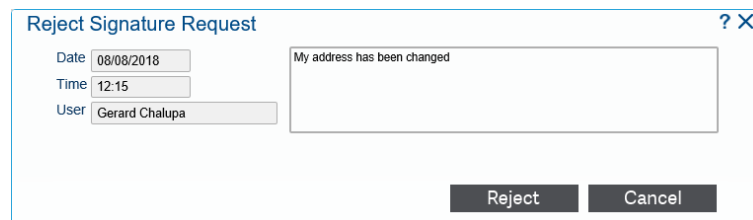
1. Log into the [Client Portal Document Listing](#) page.
2. Click on the required document to open the “[Document Details](#)” window.

3. If necessary, click  to download the document.

4. To reject the signature request for the document, click .



5. On the “Reject Signature Request” window, enter the reason for the rejection, and click **Reject**.



The reason for rejection is added to the document comments, and an email is sent to the document owner informing of the rejection.


**Signature Request Rejection**

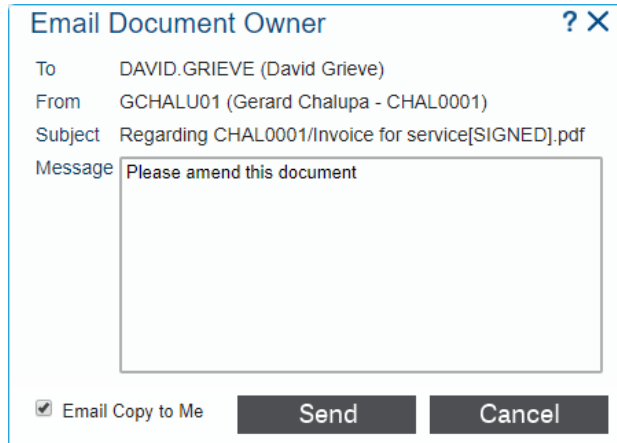
The following Signature Request has been rejected by the Client Portal User:

Document: 2018\_IForm\_1.pdf  
 Uploaded By: David G  
 Author: David G  
 Signature Requested: 10/01/2018  
 Rejected By: Gerard Chalupa  
 Comment: My address has been changed

### Sending an email message to the document owner

You can send an email message to the owner of a document in the Client Portal.

1. Log into the [Client Portal Document Listing](#) page.
2. Click on the required document to open the “Document Details” window.
3. To send an email to the document owner, click 
4. On the “Email Document Owner” window, type in your message and click **Send**.



**Email Document Owner** ? X

To DAVID.GRIEVE (David Grieve)  
From GCHALU01 (Gerard Chalupa - CHAL0001)  
Subject Regarding CHAL0001/Invoice for service[SIGNED].pdf

Message Please amend this document

Email Copy to Me **Send** **Cancel**

**Tip:** Select the **Email Copy to Me** checkbox to send a copy of the email message to your email address.

5. Exit from the “Document Details” window

The document owner will receive an email with your message.

