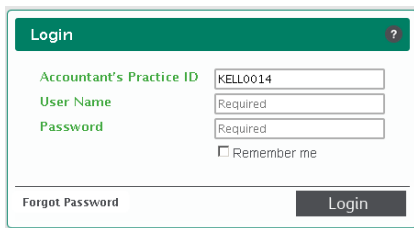


# Client Portal Tips

## Accessing the portal

Following the client portal activation process, you can login directly to our client portal site: <https://cloud1.sagehandisoft.com.au/ClientPortal/Account/Login/KELL0014> or follow the link in your notification email. Alternatively, there is a client portal link on the front page of our website: [www.kellyassoc.com.au](http://www.kellyassoc.com.au)



### **Login:**

**Accountant's Practice ID** - KELL0014

**User Name** - provided during the activation process

**Password** - set up during the activation process

If you have trouble locating your user name or password please contact us or use the 'forgot password' option.

**Select Portal Area** (relevant only to business clients with multiple portal accounts)



'Switch Users' icon:

Once you have entered a portal area, use this icon to switch into another entity.

## Uploading your information

The client portal allows you to upload documents and information for your accountant to retrieve. We will be automatically notified that your documents have been uploaded.



'Upload Manager' icon:

Select the upward facing arrow to upload your documents to the client portal.

## Electronically signing documents

The client portal allows you to sign and return documents electronically and in a single process.

### **Select Document**

Locate the new document that requires signature. The notification email sent to you provides the name of the document. The icons below will help you to identify it in your portal.



'New Mail' icon:

The red exclamation mark identifies a new document in your portal. Once you have viewed the document the new mail icon will disappear.



'Signature Required' icon:

The red pencil identifies that a document requires your signature.

### **Download and Review Document**

Download the document for review. Documents must be downloaded (to be viewed) before they can be electronically signed. Once a document has been downloaded, the red 'signature required' icon will change to orange, indicating the document is ready for signing.



'Download Document' icon

### **Sign Document**

Once you have reviewed the document and are ready to sign, click the 'sign document' icon to complete the signing process. By selecting 'sign document' you are certifying that:

- The information you are submitting is true and accurate
- You have read and understood the contents of the document
- You agree with all the declarations made within the document.



'Sign Document' icon

The orange pencil identifies that a document is ready for signing.

### **The Document has been Signed**

We will be automatically notified that you have signed the document and a 'signature stamp', stating your name, date and time that you signed and the above certifications, will attach to the original document.



'Document has been Signed' icon:

The green pencil identifies that a document has been signed.

## Portal assistance

We trust you will find our client portal beneficial and convenient. There is a short instructional video on our website (client portal link) and also at the end of the client portal activation email. If you experience problems with the portal please contact us and we will be pleased to help.