

Client Portal

Create multiple Portal Logins per client

Document Manager will display a folder for each new Portal Login.

Document listing screen

A Portal User receives an email advising them when a document has been placed into their online Portal area. Upon logging into the Client Portal your clients will view each file that has been stored in their personalised Client Portal.

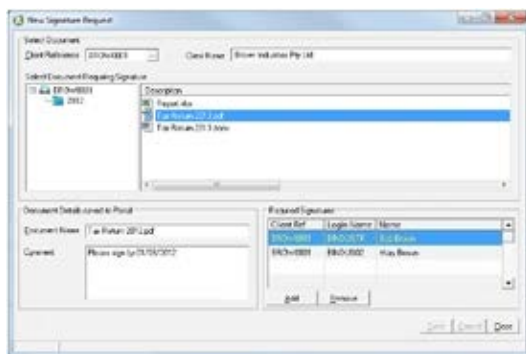
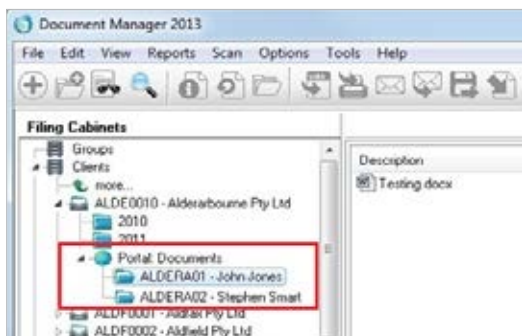
Requesting Digital Signatures

You can easily request that your clients sign-off files that have been stored in Document Manager using the new Request Signature button on the Document Details screen.

The New Signature Request screen will display the location of the selected document within Document Manager. A comment can also be entered and will appear on the Document Details page on the Portal.

After clicking the Save button, a copy of the selected file in Document Manager is sent to the Client Portal area for each specified Portal Login.

An email will also be sent to the Portal User associated with each specified Portal Login advising them that they have received a document, together with instructions on how to digitally sign the document.



A screenshot of the 'Document Listing' screen. It shows a table with columns for Document Name, Status, and Date.

Document Name	Status	Date
20151114_123518.jpg	Downloaded From Portal	01/10/2014
2014_BAS_14110.pdf	Document Signed	30/10/2014
adl/RequiredSig.docx	Document Uploaded	02/12/2014
close button.docx	Document Uploaded	02/12/2014
Connected Services - AAA.pdf	Signature Requested	02/12/2014
Connected Services - B10.pdf	Signature Requested	02/12/2014
Connected Services - Client Search - 11 Nov 2013.pdf	Document Signed	23/10/2014
Connected Services - Test10.pdf	Document Signed	30/10/2014
Connected Services - Test11.pdf	Document Signed	30/10/2014
Connected Services - Test12[SIGNED].pdf	Document Signed	30/10/2014

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We provide small and medium sized organisations, and mid-market companies with a range of easy-to-use, secure and efficient business management software and services – from small business online accounting (Sage One), accounting practice management (Sage HandiSoft), payroll and HR (Sage MicrOpay), to enterprise resource planning and customer relationship management (Sage Business Solutions).

Sage energizes the success of businesses and their communities around the world through the use of smart technology and the imagination of our people. Sage has reimagined business and brings energy, experience and technology to inspire our customers to fulfil their dreams.

We work with a thriving community of entrepreneurs, business owners, tradespeople, accountants, partners and developers who drive the global economy. Sage is a FTSE 100 company with 14,000 employees in 24 countries.