

Accounting Firm

Accounting Firm **ABC Accounting** has purchased the Client Portal module.

They are setting up their Clients with access to the Client Portal.

The Accountant's Practice ID is **HAND3015**.



Clients

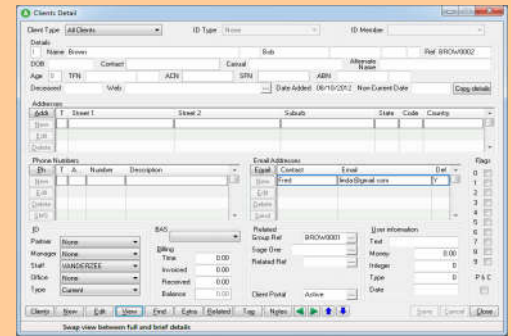
These three Clients are part of **ABC Accounting's** Client Base.

Clients are viewed using the **Clients Detail** screen.

BROW001
Brown Construction
Non-Individual

XYZC0001
XYZ Consulting
Non-Individual

BROW002
Bob Brown
Individual



Portal Users

Portal Users have been created for each of these Clients to allow the individuals associated with the Client to access the Client Portal.

- Each Portal User represents an individual.
- Signature Requests are sent to individual Portal Users to sign a document.
- Document Manager displays the Portal User Area for each individual.

Portal Users are created using the **Client Portal Configuration** screen.

Bob Brown
Construction Worker

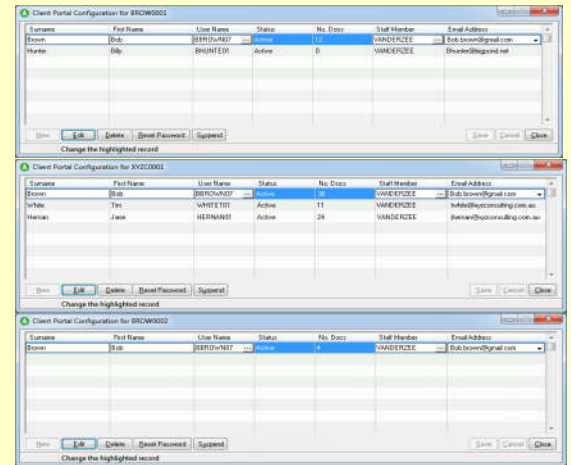
Billy Hunter
Apprentice

Tim White
Consultant

Bob Brown
Consultant

Jane Hernan
Consultant

Bob Brown
Individual



User Name

- Allocated via the **Client Portal Configuration** screen when creating the Portal User.
- Only used when logging into Client Portal.
- Indicates the User Name the Portal User will enter when they log into Client Portal.
- Has a single password and email address associated with it
- If allocated to multiple Portal Users, a list will be displayed when logging in.

Bob Brown was allocated the same User Name **BBROWN07** on all three **Client Portal Configuration** screens above. This means when he logs in as **BBROWN07** he will see a list showing his three Portal User Areas.



Billy Hunter
User Name: BHUNTE01
Email: Bhunter@bigpond.net



Tim White
User Name: WHITET01
Email: twhite@xyzconsulting.com.au

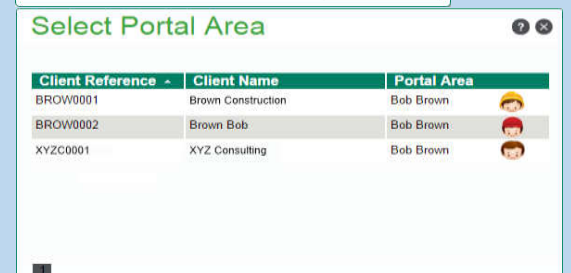
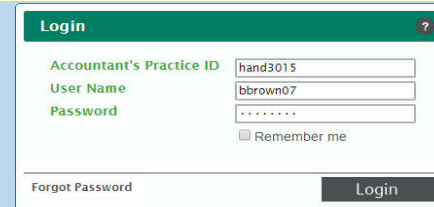


Bob Brown
User Name: BBROWN07
Email: Bob.brown@gmail.com



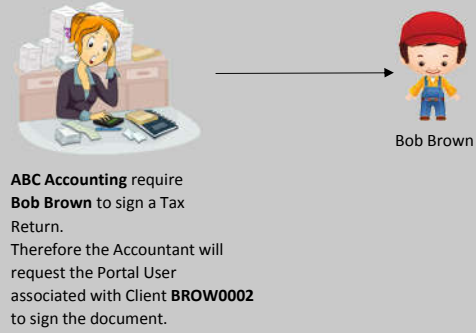
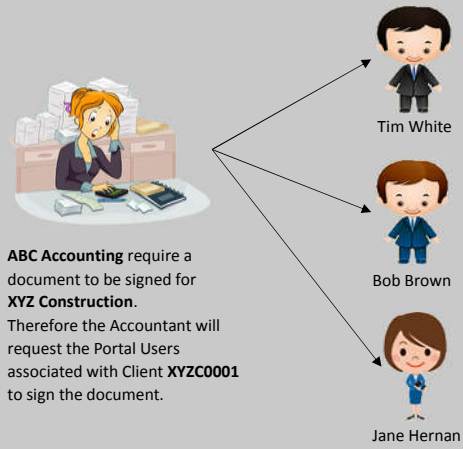
Jane Hernan
User Name: HERNAN01
Email: jhernan@xyzconsulting.com.au

eg., If Bob wishes to look at his documents related to **Brown Construction**, he would select the Portal Area associated with Client **BROW0001**.



Signature Requests

- Signature Requests are sent to individual Portal Users.
- Having multiple Portal Users allocated to a single User Name does not affect Signature Requests in any way.



New Signature Request

Select Document: Client Reference: XYZC0001 Client Name: XYZ Consulting

Select Document Requiring Signature: XYZ Construction BAS Statement.pdf

Document Details saved to Portal: Document Name: XYZ Construction BAS Statement.pdf Comment:

| User Name | Client Ref | Client Name |
|-------------|------------|----------------|
| Bob Brown | XYZC0001 | XYZ Consulting |
| Jane Hernan | XYZC0001 | XYZ Consulting |
| Tim White | XYZC0001 | XYZ Consulting |

New Signature Request

Select Document: Client Reference: BROW0002 Client Name: Mr Brown Bob

Select Document Requiring Signature: Tax Return 2016.pdf

Document Details saved to Portal: Document Name: Tax Return 2016.pdf Comment:

| User Name | Client Ref | Client Name |
|-----------|------------|--------------|
| Bob Brown | BROW0002 | Mr Brown Bob |