

# Sage HandiSoft Getting started with Connect



*The optional HandiSoft Connect facility enables designated users of your HandiSoft products to access client and other information remotely via a web browser on a desktop or laptop computer, a mobile phone or tablet.*

Because it is accessed via a web browser, HandiSoft Connect is supported on Microsoft, Apple and Android devices. Using HandiSoft Connect you can remotely view, add and edit client details. Future versions will also enable you to do the following:

- View, add and edit documents in the Document Manager
- Add, view and edit Time+Billing timesheets
- Manage your Practice Manager diaries
- Download your clients' tax returns as PDF files
- Generate and download HandiLedger Company Financials reports for your clients



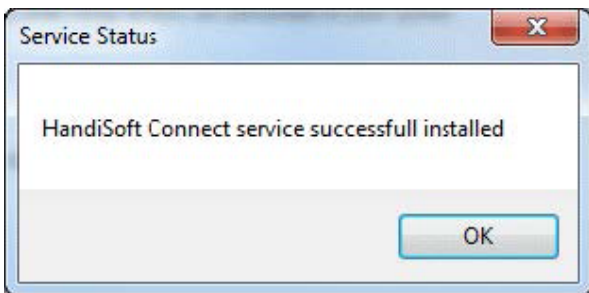
## **About Sage HandiSoft:**

More than 7,500 Australian accountants and taxation agents trust Sage HandiSoft's leading practice management, client accounting and taxation software. Sage HandiSoft's integrated suite and central client database is reliable, easy to use and highly effective for sole practitioners through to larger firms with 70+ staff. Sage HandiSoft is a wholly owned subsidiary of the listed global Sage Group plc which has over 6 million customers and more than 12,600 employees worldwide.

### Activating the HandiSoft Connect Service

To use HandiSoft Connect, you have to first activate the HandiSoft Connect service on the computer on which your HandiSoft products are installed.

1. Ensure that none of your users are running any HandiSoft products.
2. On the computer that houses your Hsoft folder, open Windows Explorer. **Important: You must be physically at the machine where the Hsoft folder is located.**
3. In Windows Explorer, navigate to the Hsoft\Apps folder.
4. Double click the file 'InstallHSCConnectService.exe'. (InstallHSCConnectServiceSQL.exe for SQL clients This will create and then start the HandiSoft Connect service. When the service has been installed and started, you should see this message.
5. You can now set up your users' access to HandiSoft Connect.



### Managing HandiSoft Connect Users

#### Adding HandiSoft Connect users

Before your users are able to link to HandiSoft Connect, they need to be connected to the system and have their email addresses validated.

To do this:

1. Run one of your HandiSoft programs; for example, Practice Manager 2014.
2. From the **View** menu, click Users to open the "Select a User" or "Users" window.

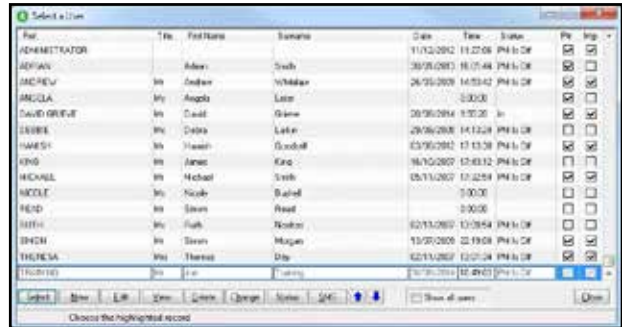


Figure 1: The "Select a User" window

3. Highlight the required user and click **Edit**.

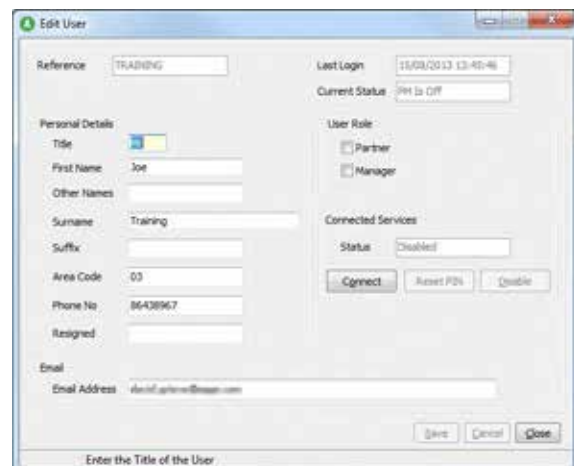
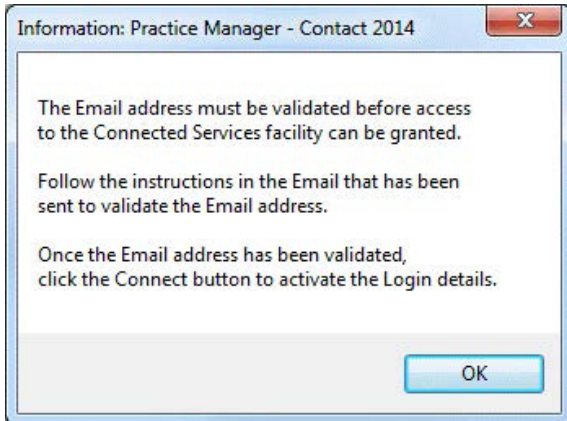


Figure 2: The "Edit User" window

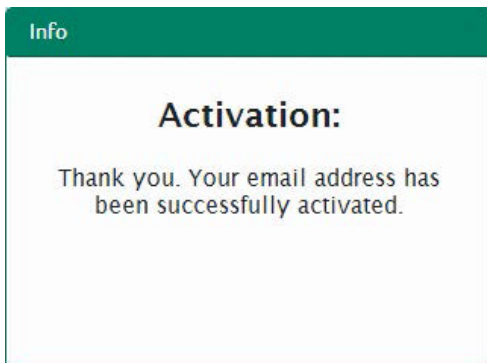
4. On the "Edit User" window, under **Connected Services**, the **Status** field will display **Disabled** if the user has not been connected to HandiSoft Connect.



- Under Email, check that the correct email address for the user has been entered.
- Under Connected Services, click Connect.  
If the user's email address has not yet been validated, HandiSoft Connect will send an email to the user, and your HandiSoft program will display the following message.



The email sent to the user will have a link to the Email Validation web page. When they click on the link, the following message will be displayed to indicate successful email address validation.

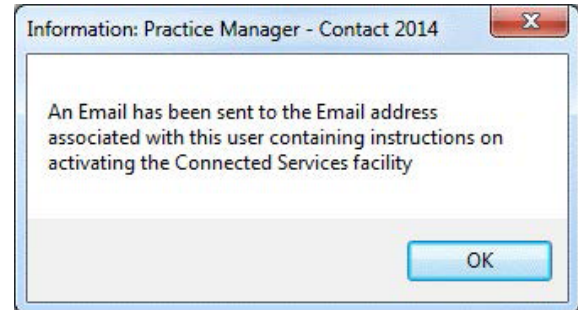


- Click OK to return to the "Edit User" window. The Email Address field will now indicate that the email address has been validated.



- Once the user's email address has been validated, click Connect again, and the following message will be displayed

The email sent to the user will have a link to the HandiSoft Connect Web site, and the user's unique login PIN.



### Changing Users' PINs

If you know a user's existing HandiSoft Connect login **PIN**, it is possible to change it via the "Edit User" window.

To do this:

- Run one of your HandiSoft programs; for example, Practice Manager 2014.
- From the **View** menu, click **Users** to open the "Select a User" or "Users" window.
- Highlight the required user, and click **Edit** to open the "Edit User" window.  
Under **Connected Services**, the Status field should display Enabled, indicating that the user is connected to HandiSoft Connect.
- Click Change PIN to open the "Change PIN" window.

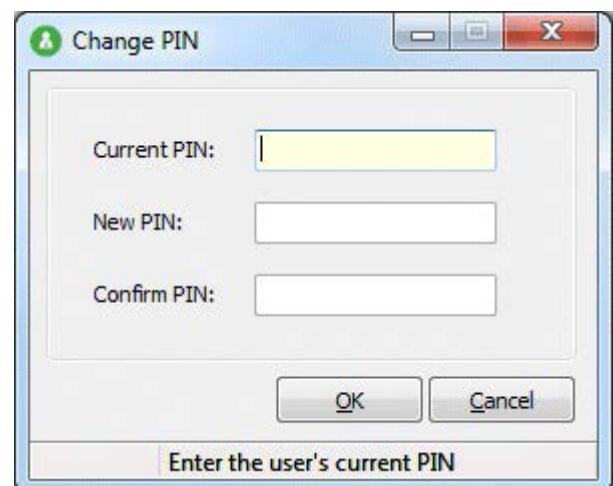


Figure 3: The "Change PIN" window

5. In the **Current PIN:** field, enter the user's existing PIN.
6. In the **New PIN** and Confirm PIN fields, enter the user's new four digit PIN.
7. Click **OK** to change the PIN and exit the "Change PIN" window, or click **Cancel** to exit the "Change PIN" window without changing the PIN.

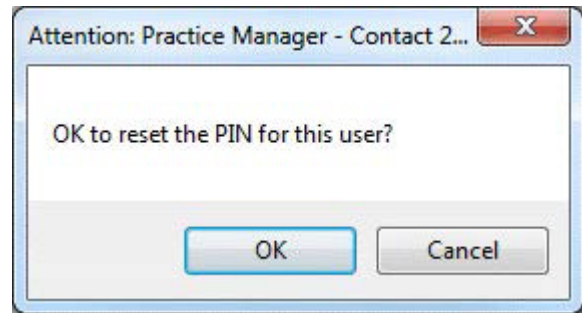
### Resetting and disabling users' PINs

If you are an Administrator, you can reset a users' PINs to enable the creation of a new PIN, or you can disable users' PINs to remove their access to HandiSoft Connect.

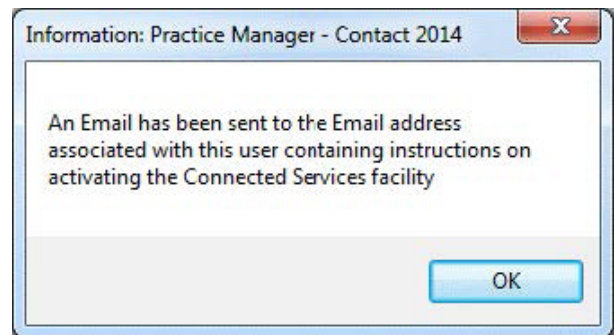
1. Run one of your HandiSoft programs; for example, Practice Manager 2014, as Administrator.
2. From the **View** menu, click **Users** to open the "Select a User" or "Users" window.
3. Highlight the required user, and click **Edit** to open the "Edit User" window.  
Under **Connected Services**, the **Status** field should display **Enabled**, indicating that the user is connected to HandiSoft Connect.  
Because you are logged in as Administrator, the **Reset PIN** and **Disable** buttons will be available under **Connected Services**.



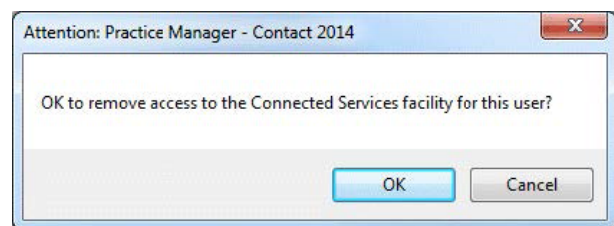
4. To reset the user's PIN, click **Reset PIN**.
5. Click **OK** to confirm the PIN reset.



HandiSoft Connect will send an email to the user with a new four-digit PIN and activation instructions.



6. Click **OK** to return to the "Edit User" window.
7. If you want to prevent the user from logging into HandiSoft Connect, click **Disable**.
8. Click **OK** to the "Attention window to confirm removal of access for the user.

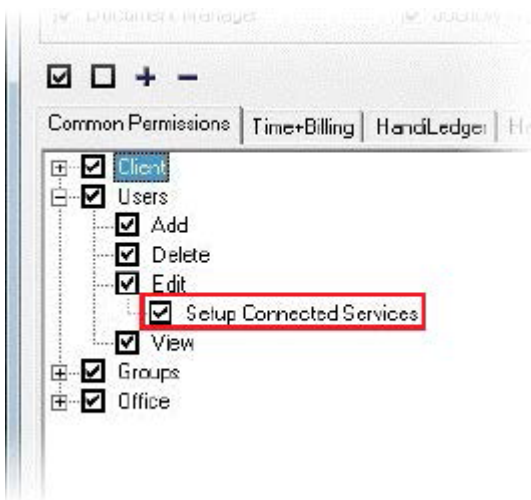


The user will no longer be able to access HandiSoft Connect.

### Practice Manager – Security settings

If you are using Practice Manager – Security to manage access to your HandiSoft programs and client information, you will need to do the following to allow users to access the HandiSoft Connect user settings.

1. Run Practice Manager – Security as Administrator.
2. On the Access Panel, click **Groups**.
3. Highlight the group to whom access is to be granted, and click **Edit** to open the “Properties for:” window.
4. Click the **Common Permissions** tab, and expand the **Users** and then **Edit** branch.



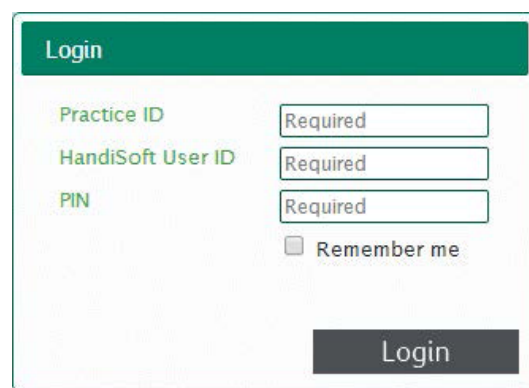
5. Select the **Setup Connected Services** check box to allow the group to manage your HandiSoft Connect users.
6. Click **OK** to accept your changes and exit the “Properties for:” window.

### Logging in to HandiSoft Connect

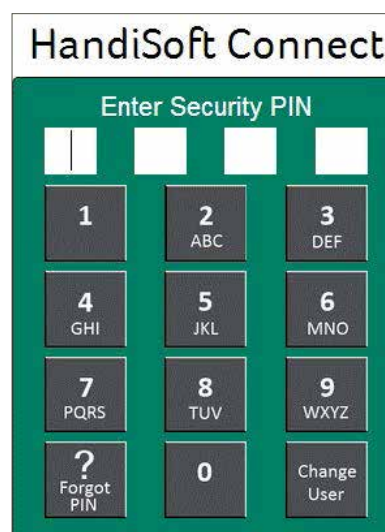
After you have been connected as a user to HandiSoft Connect and received your unique PIN, you can remotely access your HandiSoft programs via the Internet browser on a desktop computer or mobile device.

Once your Email address has been validated, you should receive an email with your unique pin and a link to the HandiSoft Connect Login Website.

1. Open the Internet browser on your computer or mobile device.
2. Go to the Web site sent to you via email.



3. Enter your Practice ID, HandiSoft User ID and unique PIN to log into HandiSoft Connect.  
To avoid entering your Practice ID and HandiSoft User ID when next logging into HandiSoft Connect with that device, you can select the Remember me checkbox.  
If you select the Remember me checkbox, future logins on that device will only require you to enter your PIN.



- If you enter an incorrect PIN, the following error message will be displayed.



Click **Close** to return to the "Login" page. This time, a **Forgot PIN** link will be available for you to reset your PIN. If you click Forgot PIN, a new PIN will be emailed to you

- On the HandiSoft Connect main page, click on the required function.

**Caution:** If you enter the incorrect PIN more than three times in succession, you will be locked out of HandiSoft Connect until your PIN is reset by an Administrator via the HandiSoft "Edit User" window.

Click on or tap the left and right arrow buttons to scroll through the options.

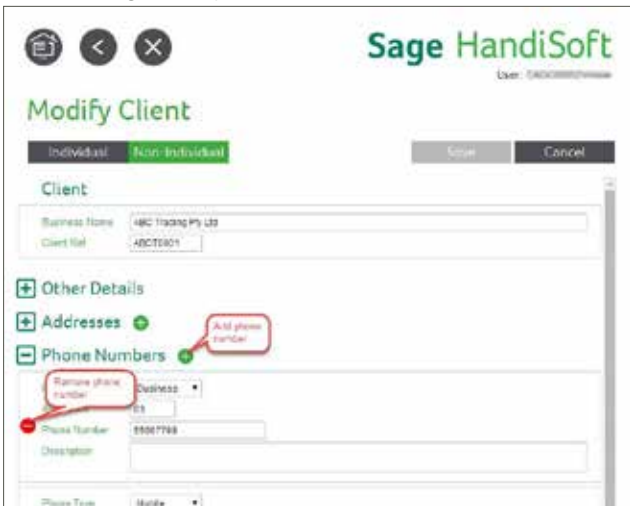


Figure 4: The HandiSoft Connect main page

**Note:** Currently, you can select only the **Clients** option. The **Diary** and **Timesheets** options will be available soon.

### Managing your client database via HandiSoft Connect

Using HandiSoft Connect you can remotely view, add and edit client information. You can also do the following:

- Add, read an edit notes appended to the client
- If you have the optional HandiSoft Notify module, you can send SMS messages to your clients.

#### Viewing and editing clients

- Open the Internet browser on your computer or mobile device.
- Go to the HandiSoft Connect Login Web site.
- Log in to HandiSoft using your unique PIN.
- On the HandiSoft Connect main page, click the Clients icon to open "Client Search" page.

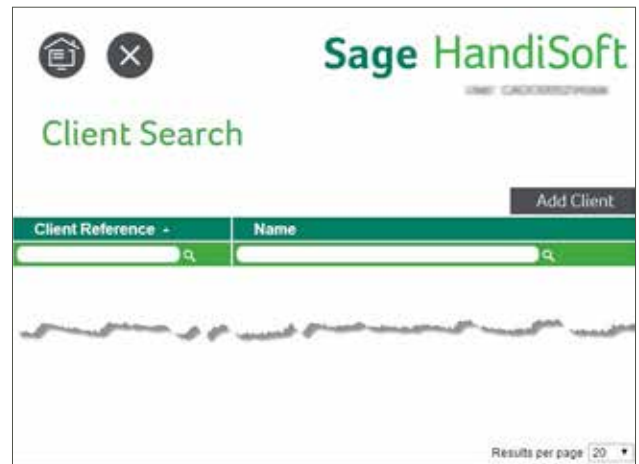




Figure 5: The "Client Search" page



- In the Client Reference or Name field, enter all or part of a client's HandiSoft reference number or name and click to list matching clients.
- Click on the client to be viewed or edited to open the "View Client" page.

Client Reference	Name
AA0001	Example Handiasset Company
ABCF0001	ABC Fund Trust
ABCT0001	ABC Trading Pty Ltd
AJRU0001	AJ Rubens Estate

Figure 6: The "View Client" page



- Click the  and  buttons to view and hide the fields containing the client information.



- To view the client's address on a map, expand the Addresses section and click .
- To edit the client's details, click  to open the "Modify Client" page.



- Edit the information as required.

- Where you can enter more than one set of information (for example, Phone Numbers) click  to add a new set. To delete a set, click .

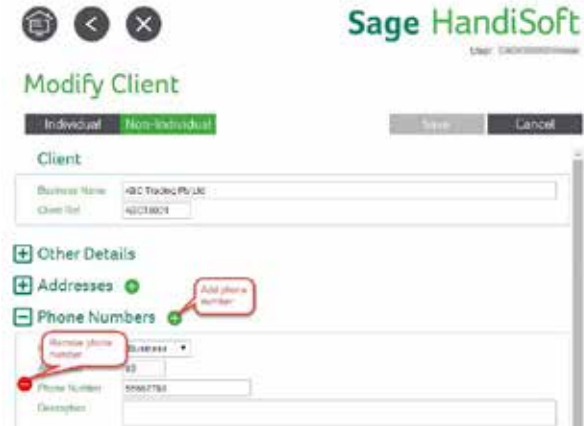


Figure 7: The "Modify Client" page

- Click **Save** to save your changes.

### Adding a client

Do the following to add a new client via HandiSoft Connect

- Open the Internet browser on your computer or mobile device.
- Go to the HandiSoft Connect Login Web site.
- Log in to HandiSoft using your unique PIN.
- On the HandiSoft Connect main page, click the **Clients** icon.
- Click **Add Client** to open the "Add Client" page.

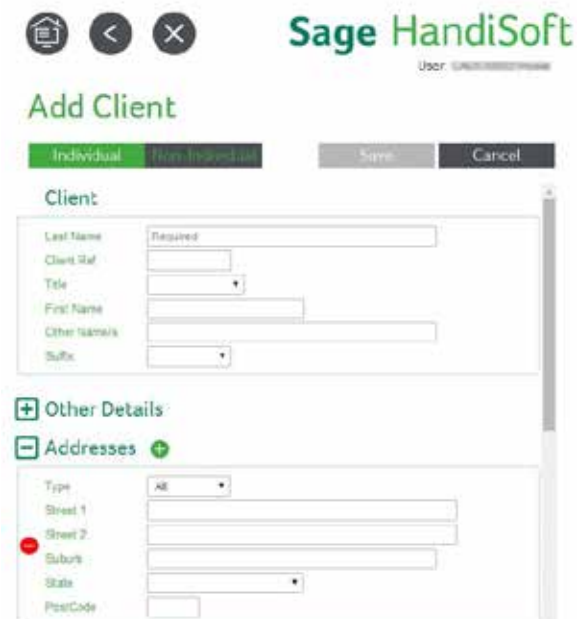


Figure 8: The "Add Client" page

6. Select whether the added client is an **Individual** or **Non Individual**.



7. Complete the client details in the fields provided.
8. Click the **+** button to expand each section to access the fields.
9. Where you can enter more than one set of information (for example **Phone Numbers**) click **+** to add a new set. To delete a set, click **-**.
10. Click **Save** to save the added client.

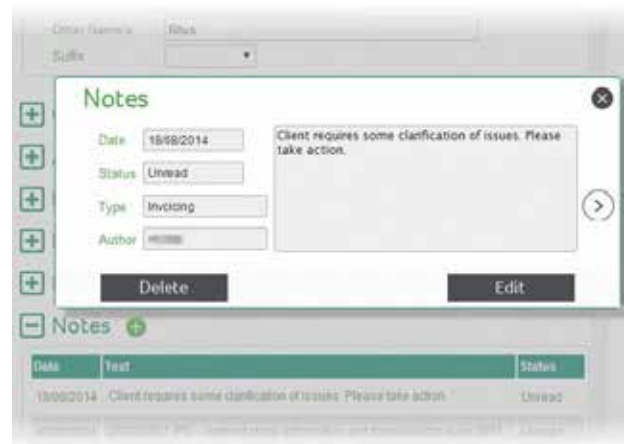
### Managing client notes

You are able to add, read and edit notes attached to clients.

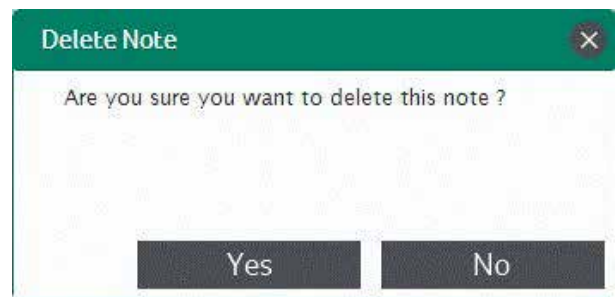
### Viewing and editing client notes

1. Open the Internet browser on your computer or mobile device.
2. Go to the HandiSoft Connect Login Web site.
3. Log in to HandiSoft using your unique PIN.
4. On the HandiSoft Connect main page, click the **Clients** icon to open "Client Search" page.
5. In the **Client Reference** or **Name** field, enter the client's HandiSoft reference ID or name. You can enter a partial reference ID or name, and select from the list of matching clients.
6. On the "View Client" page Notes section, click **+** to display the notes currently attached to the client.
7. To view, edit or delete a note, click on it.

8. To edit the note, including changing its status from **Unread** to **Read**, click **Edit**.




9. To delete the note, click **Delete**, and then **Yes** on the **Delete Note** message box.



10. You can click the **<** **>** buttons to move between notes.

### Adding a client note

1. Open the Internet browser on your computer or mobile device.
2. Go to the HandiSoft Connect Login Web site.
3. Log in to HandiSoft using your unique PIN.
4. On the HandiSoft Connect main page, click the **Clients** icon to open "Client Search" page.
5. In the **Client Reference** or **Name** field, enter the client's HandiSoft reference ID or name. You can enter a partial reference ID or name, and select from the list of matching clients.
6. On the "View Client" page, click  to open the "Modify Client" page.



7. Click **+** next to **Notes** to display the notes currently attached to the client.
8. Click **+** to add a new note.
9. Complete the fields and click **Save** to save the new note.
10. On the "Modify Client" page, click Save.

### Sending SMS messages to clients

If you have purchased the optional HandiSoft Notify module, you can use HandiSoft Connect to send SMS messages to your clients.

1. Open the Internet browser on your computer or mobile device.
2. Go to the HandiSoft Connect Login Web site.
3. Log in to HandiSoft using your unique PIN.
4. On the HandiSoft Connect main page, click the Clients icon to open "Client Search" page.
5. In the Client Reference or Name field, enter the client's HandiSoft reference ID or name. You can enter a partial reference ID or name, and select from the list of matching clients.
6. On the "View Client" page Phone Numbers section, click **+** to display the client's phone numbers.
7. To send an SMS, click **+** next to the required mobile phone number.



8. Complete the SMS fields.



- The Phone field will display the selected mobile phone number, which you can change if necessary.
  - Select the Create Event checkbox if you want to create an event in Practice Manager.
  - Select No Signature if no signature is required for the SMS message. Select Company Signature or User Signature to insert your saved company or user signature. This will be displayed in the box below for you to edit.
  - Enter your SMS message text.
9. Click Send to send the SMS message. An information message will indicate successful transmission.