All Accounts Matter LTD

367 Wakefield-Kohatu Highway, RD1, Wakefield 7095
021 221 1009 | 03 541 9005
sonia@allaccounts.co.nz
www.allaccounts.co.nz

CHARTERED ACCOUNTANTS™
AUSTRALIA + NEW ZEALAND
xero myob 2020/2021 Certified Consultant

CLIENT PORTAL GUIDE

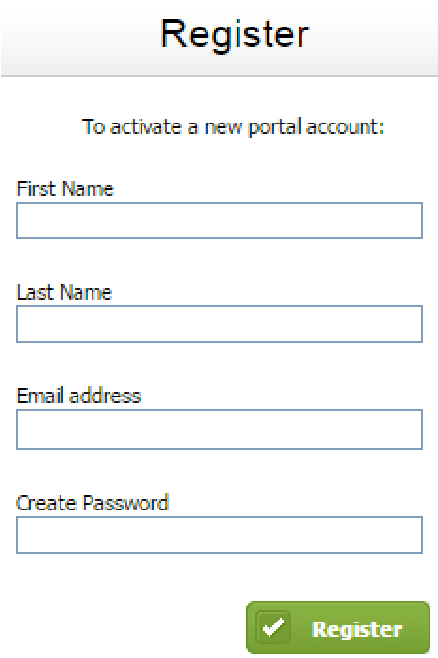
We are constantly looking at ways to make it easier to share information, and so we have just introduced a client portal into our client management processes. The client portal service includes:

- Ability to view documents we wish to share with you.
- Ability for you to upload documents securely and share with us.
- Ability for you to sign documents and return to us for filing without the need for hard copies.
- Secure access to other useful applications as we see fit.

If you have any issues or concerns with this process, please email ***admin@allaccounts.co.nz*** or phone the office.

What to Expect

When invited to register for portal, you will receive an email from ***allaccountsmatter@cchifirm.com***. Click the link to register. Enter your name and email address and set a password - at least 8 characters. You can click 'forgot password' if you need to reset this in future. Please make sure that when you complete the fields, you use your full legal First Name and Last Name as when you are signing documents using this portal, you need to sign with your legal name.



How to Use the Portal

When we upload documents to your portal in future, you will get an email from ***allaccountsmatter@cchifirm.com***
Simply click the link and sign in. You will be automatically taken to the document that has been added. You can also log in to the portal at any time without being prompted as per the instructions below.

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Portal Homepage

To log in to our Client Portal go to https://allaccountsmatter.acclipse.com/clientportal. You will be directed to this when first registering for a portal. You might like to bookmark this link in your web browser. Alternatively, you can access the client portal any time by going to our www.allaccounts.co.nz website home page, and clicking on the words Client Portal in the green ribbon along the top.

A copy of these instructions can also be found on the website under Resources.

When you arrive at the Portal homepage, you will see up the top right, your name, the Logout button, and a Help section. On the top left you will see a menu:

My Details

If you click on this, it will show you some of the details that we hold on file for you. Please update these if they need updating at any time. This information will then be fed back into our system.

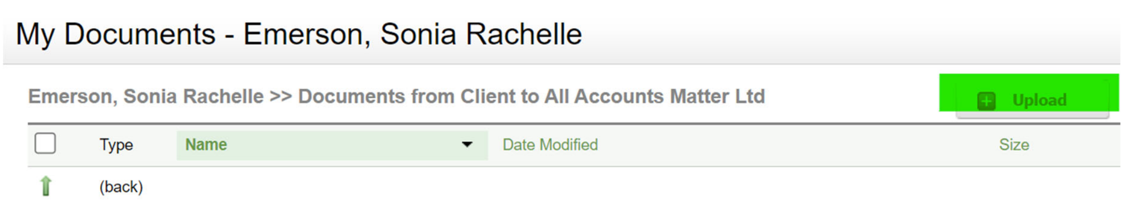
My Documents

This is the part of the portal where you can easily and securely share documents with us, and we can share them with you. If you click on this, you will be taken to a set of folders as follows:

- *Documents to be Signed* - this folder will contain documents that have been sent to you by All Accounts Matter that require your signature or other authorisation. Once signed, the documents will no longer appear in this folder.

- *Signed Documents* – this folder contains documents that you have signed and sent back to All Accounts Matter [until such time as they are then actioned by All Accounts Matter].

- *Documents from Client to All Accounts Matter Ltd* – this folder is for you to upload documents that you want to share with us. Click on the folder, then select the Upload button. You can then Select the Files you want or drag and drop the files you want to share with us. We will be automatically notified that you have uploaded something so there is no need to email us separately.



- *EOY Finalised Documents from All Accounts Matter Ltd*– in this folder you will find the final signed annual accounts once they have been signed by you and returned, and then actioned by us. You can refer back to this folder in the future to access copies of the accounts that you might need for your own use, for the bank, or for any other reason.

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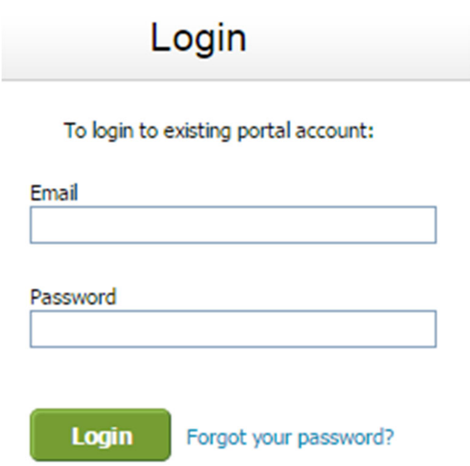
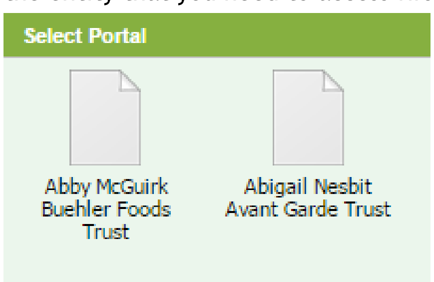
Working with Multiple Portals

If you are associated with multiple entities, such as a company and a trust, you may be invited to multiple portals. When you receive your second invitation to register, simply click the link and login to your existing account.



If you have more than one portal, when you login you will be asked which portal you want to access – just click on the entity that you need to access first.



Once you are logged in, you can quickly toggle between portals by clicking on Select Portal which is in the top right hand corner so you can easily toggle between your entities. Think of it as opening two different drawers of your portal.

If you are unsure which portal you are in, you can see this by going to My Details.

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Using eSign

As mentioned above, we will also be using the Client Portal to send documents to you for signing. This will speed up the process of sending and receiving signed documents. When your accountant uploads a document which needs to be signed, you will receive an email from ***allaccountsmatter@cchifirm.com*** inviting you to review a document.

Reviewing documents

To review and 'Sign' a document, click the link in your email, then you will be directed to your portal login page. Put in your login details to view the document to be signed. Remember to use your full legal First Name and Last Name as when you are signing documents using this portal, you need to sign with your legal name. The digital signing of documents does not have to be an actual reproduction of your signature, but it is just as legally binding.

Once the document opens, click 'Review and Sign'.

Review and Sign

You can read through the documents first, then Save and Exit if you aren't ready to sign or if you would clarification on anything. Or if there are errors in the documents that need amending, you can reject the docs, and then get in touch with any amendments that you require. Please only use this option if you are sure a change needs to be made. If you are unsure but think a change might be necessary, just use the Save & Exit and send through your query via email. This is because the rejection process cannot be undone.

SAVE & EXIT   ESIGN & SUBMIT   REJECT DOCS

Signing documents

Your accountant will drag and drop the fields into the appropriate position on the document. This might include any of these types of fields:

Name Signature Initials Date DateTime Check Title Text

Down the left hand side, you will see a number of coloured arrows which show the number of items to be completed. When these are red, you still need to complete that item. When they are all green, you have completed everything you need to complete.

You must complete the fields below before signing this document.

Date required

Date required

Date required

Sign here

Sign here

Sign here

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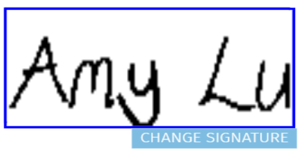
For the Date Required fields, click on each of the red arrows, and it will take you directly to the box that needs to have the date added. Simply click in the box and it will populate the box with todays date. Click on the next Date Required field and repeat the steps. Continue until all of the date fields are green/completed.

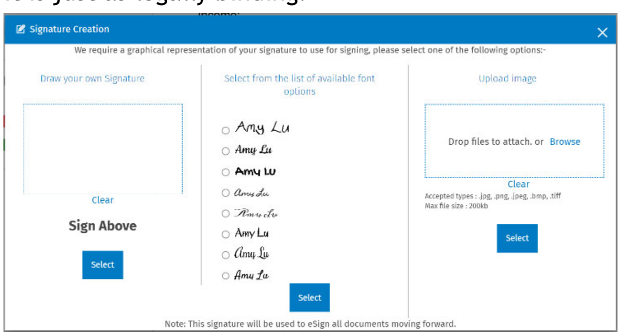
For the Sign Here fields, click on the first red arrow and it will take you to the first signature required box. Click in the box and it will automatically put your name in the box. To change your signature, follow the instructions below. If you are happy with your signature, then click on the next red Sign Here arrow and repeat the steps. Continue until all of the Sign Here fields are green/completed.

Changing/Setting Up Your Signature

Once you have setup your signature the first time, you can just continue using that signature without the need to change it, unless you wish to. If you want to change the style of the signature, click this box again, you will see 'change signature' showing up underneath the bottom right of the signature box.



Click 'CHANGE SIGNATURE' and it will take you to the signature creation window. In here, you can draw your own signature, choose a particular font to use for your digital signature or upload your actual physical signature image. Remember that the digital signing of documents does not have to be an actual reproduction of your signature, but it is just as legally binding.



Once you change the signature style, all signatures in this document will update to that signature.

Finalising Review

Once you have finished your review and are happy, and have finished all signing and dates, all the red bars will be green. You are then ready to click the button 'ESIGN & SUBMIT' at the top right.

Smartphone

You can also sign documents from your phone, the process will be very similar. The fields menu will look a little different, and you can sign with touch-screen.

HELP

For more detail go to http://cp-help.cchifirm.com, call us on 03 541 9005 or email ***admin@allaccounts.co.nz***