



Walsh Accounting Portal User Instructions

Getting Started

Terms

Dashboard - home page, where you can see recent activity such as recent documents uploaded by either Walsh Accounting or yourself.

Documents - Your list of documents available. You can search documents by entity, date or keyword.

Accessing the Portal for the first time

When you receive an invitation to access the portal, click on the link in the email and this will take you to an area to enter your password. Please note passwords must contain at least one capital letter and one number and be at least 8 characters in length.

Once you have entered your password, you will be redirected to the portal login page. Enter your email address and password to access the portal.

Uploading documents

- Documents can be uploaded to the Portal for access by your accountant.
- From the documents tab, select upload file which will open file explorer, select the file(s) you wish to upload and click open. Hint: If you wish to upload to a particular filter, click on the filter prior to uploading.
- An uploads notification will pop-up to show progress and will automatically minimise once the files are fully uploaded.
- Documents can also be uploaded by dragging and dropping them onto the portal website.

Previewing and Downloading documents

- By selecting a file you can choose to:

1. Preview - this will open the file in the website to enable viewing.
2. Downloading - this will download the file to your computer, the actions after download will depend on the browser that you are using.

Assigning Filters to documents

- Filters are assigned to your documents to assist in accurate storage and retrieval of your document, making it easy for you and your Accountant to find it when you need.
- If you have uploaded a file and need to assign (or reassign) a filter, select the document, click on the filters tab and choose assign and then select from the available filters.
- It is possible to create, rename and delete filters - we suggest this is done with caution as these filters have been set-up by your accountant.

Signing Documents

The portal enables the electronic signing of documents, either for a single person or for multiple signatories. If a document has been uploaded for you to sign, you will see the signing option in the task column next to the document name. There was previously several options available, however we will be retiring Click to Sign and SecureSign in favour of Adobe Sign.

Adobe Sign - Click to Sign or SecureSign

When a document has been set-up up for Adobe Sign, you will receive an email with a link to the document. If Click to Sign or Secure Sign is also enabled the location in the email where the pin code would appear will instead show the text '**No PIN Required for Adobe Sign**'. Clicking on the link in the email will take you to the Adobe Sign website to access and sign the document.

The default Adobe Sign task enables you to click and accept the document without the need to enter a signature images throughout the document. This method of signature is very secure and just requires you to confirm that you accept the entire document. To access the Adobe Sign website to sign the document either click the link in the email, or, in the portal, select the document and click the Sign button. The sign button will only be enabled if you are able to sign the document.

Once you have read the document and are happy to sign, click on the 'Start' (yellow tab)



and you will be taken to a box for your signature - your email is displayed under this box. Click on the text 'Click here to sign' and either type, draw or select an image to sign. Click

on Apply and you will be asked to confirm with the 'Sign' (red tab). Click the button at the bottom with text 'Click to Sign'. Once the document has been signed, your signature details will be added to the document.

The Adobe Secure Sign task works in a similar way and the Adobe Sign website is accessed the same way, either clicking the link in the email, or select the document in the portal and click the Sign button. The sign button will only be enabled if you are able to sign the document.

In the document locate and click on the signature panels by following the 'Start' or



'Next' yellow tabs (there could be multiple places that your signature is required). Click in each box and either type, draw or select an image to add your signature or any other fields that have been set-up on the document. Click on Apply until all signatures and any other details are added. Once all fields have been completed, you will be asked to confirm with the 'Sign' (red tab)



taking you to the 'Submit and Proceed to Sign' or 'Click to Sign' button at the bottom. Confirm by clicking this button. Once the document has been fully signed, your signature and any other details will be added to the document.