



CLIENT PORTAL UPDATE

We constantly look at our systems to ensure we provide the most up to date services for our clients. Upon review, we have decided to upgrade our Client Portal to one run by our core tax and accounting software supplier, MYOB.

Old Client Portal

Updating our Portal will overcome problems users were experiencing, like delays in loading documents and accessibility issues with different devices and browsers. It also overcomes the need to log into the Portal via our website.

Transition

In making the change over, the old Client Portal will be turned off on **28 February 2020**.

Using our website to access the old Portal will only be available until this date. From March onwards the link will be updated to the new MYOB Client Portal and you will be automatically redirected.

Documents previously loaded or stored on the old Client Portal may no longer be accessible. Please take the opportunity to view and download any files from the old Portal because they will not be transferred to the new Portal.

As and when we need to send correspondence to you we will make contact and guide you through the set up process.

If you would like to access the MYOB Client Portal earlier, please contact us to begin set up.

Client Portals – in General

Client Portals enable the **secure transfer and storage of information, for documents like tax returns, financial reports, activity statements and general correspondence.** They provide a *high level of security* and the ability to transfer larger volumes of data when compared with email systems, and enable a better way for us to work together securely.

If you would like to learn more about Client Portals here is a link to provide you with some general information:

What is a Portal -

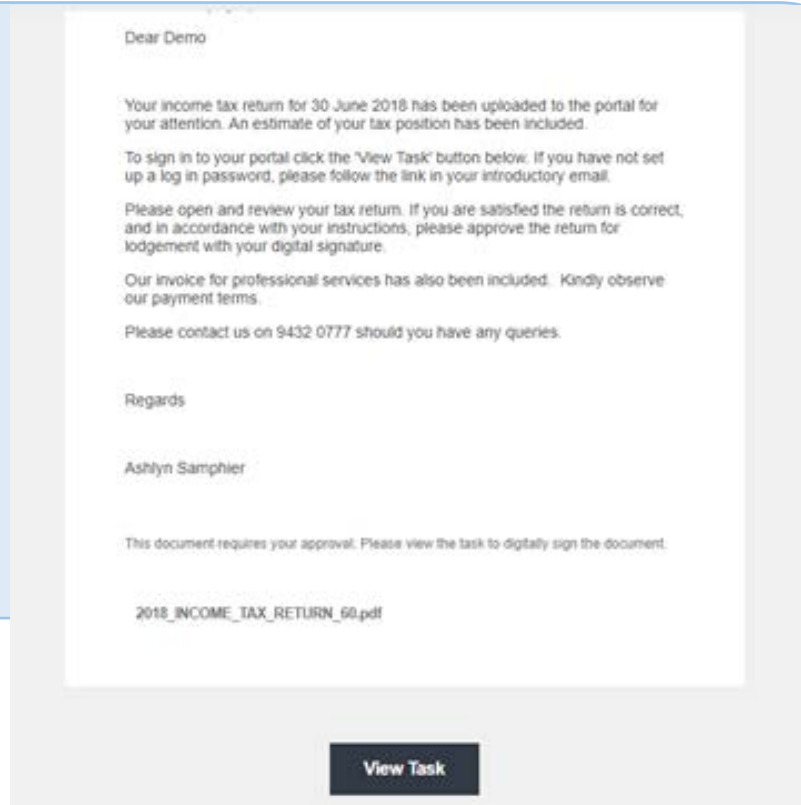
https://en.wikipedia.org/wiki/Client_portal

As with any new system there will be some initial learning as it looks and works slightly differently, but we are confident that it will not take long for clients to adapt and utilise the new Portal.



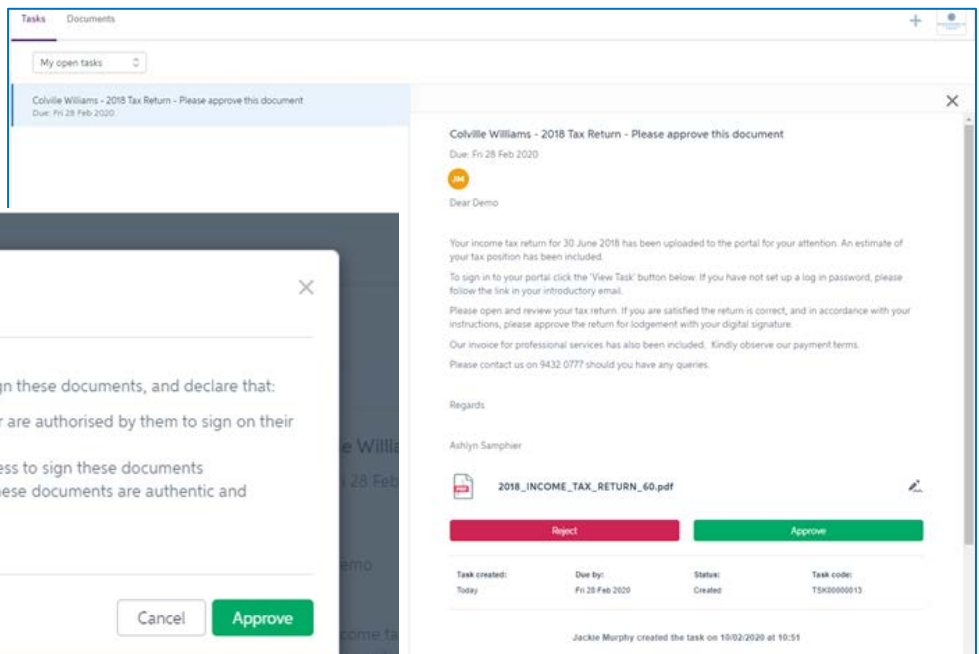
New Client Portal

The new MYOB Portal provides for instant uploading of documents, an ability for clients to 'digitally sign' documents such as tax returns, and direct access to the Portal from the notification email. You can log in to the Portal from anywhere that you have internet access.



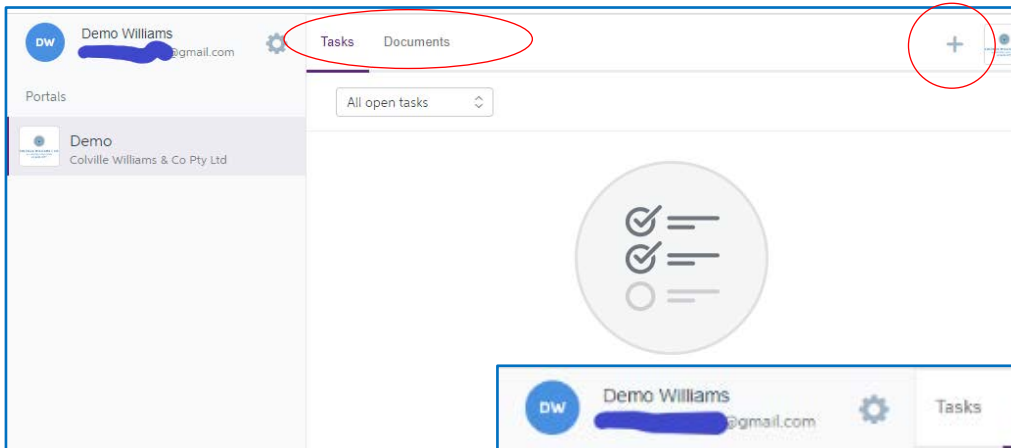
Changes

The MYOB Client Portal *Digital Signature of Income Tax Returns* means you can easily access and approve your tax return via smart phone, tablet or computer. This is a more secure method than scanning and emailing an approval for lodgement. It is important to note that each '*digital signature*' needs to be unique to the person signing the return. **Therefore each individual must have their own email address to logon to the Portal for this feature to work.**

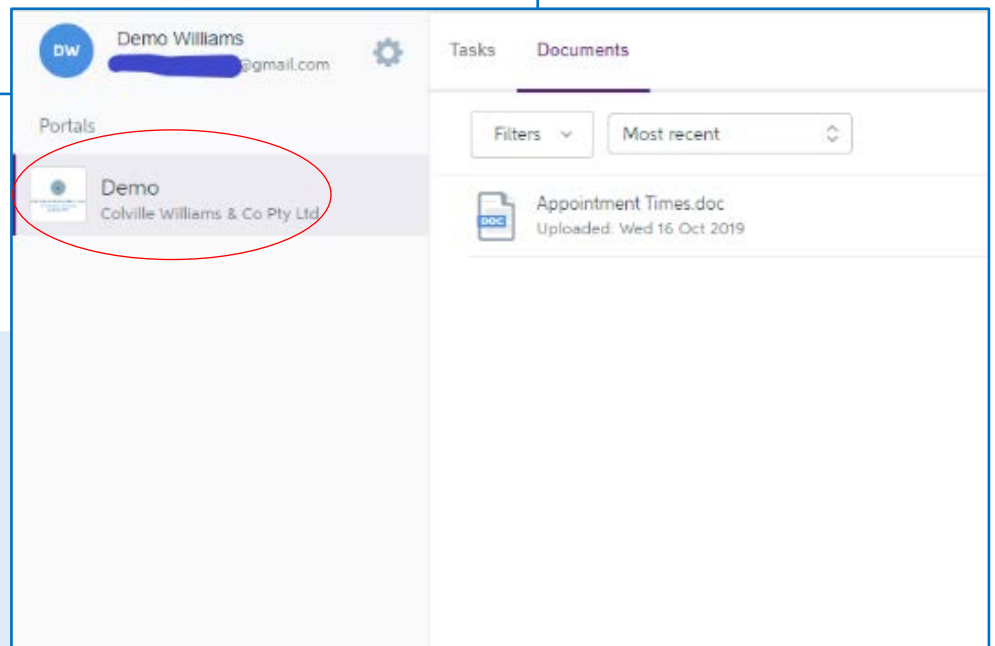




Another significant change is the way the Portal looks. Rather than storing files in document folders, everything stored is viewable on the one "Document" screen. Default settings will place the newest file at the top of the list however useful tools are provided to sort, categorise and locate files more quickly and efficiently. You will be able to switch views between 'Tasks' (requiring digital signature) and 'Documents'



Clients can upload documents to us by clicking the + sign and attaching the files.



Clients requiring access to multiple entities will still be catered for. When you log in you will have a 'pick list' of available accounts to view. Each entity will have its own area.

Kindly note, you will not need a separate email address for each entity. Only each individual person requires a separate email address to enable digital signature of documents.

If you do not already have an email address here is a quick video on how to set one up:

How to set up your email – <https://youtu.be/ym2C0Xj3CUg>

Click here for easy setup

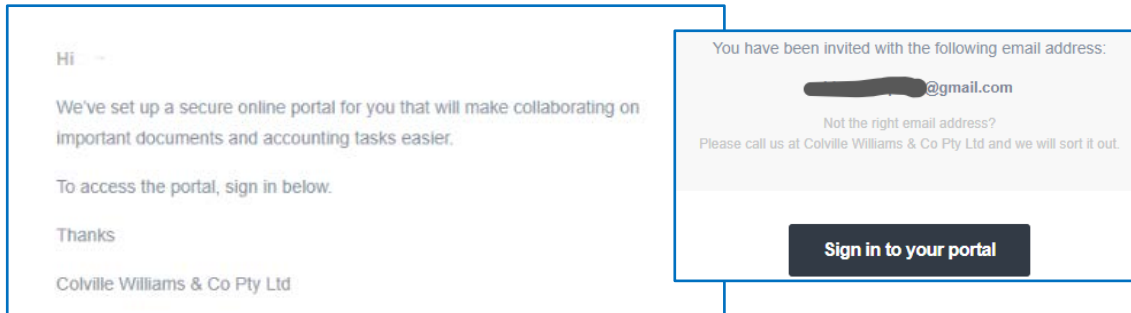
In the coming months, we will be verifying our database with your most up to date details.



Setting up the MYOB Client Portal

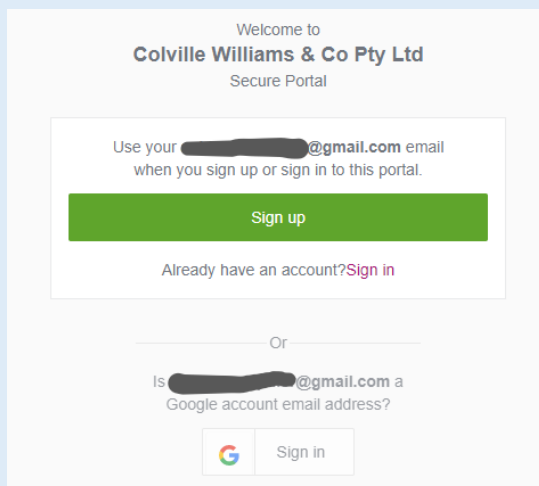
Shortly you will receive an email from MYOB inviting you to set up login in details for the new Portal.

To set up your portal you will need to click the 'Sign in to your portal' button. This will take you to the login page.

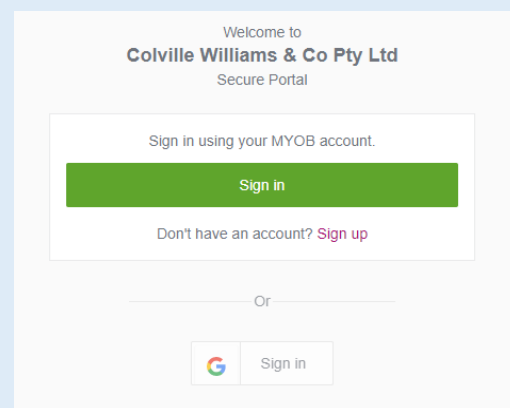


Some clients will already have a MYOB account, this is because they are currently using online MYOB based accounting software in their business. The process will be different for those users.

So, if you do not have a MYOB account already, you need to click on the 'Sign Up' option to create a password and access your portal.



If you do have a MYOB account and you wish to use the same email address for your Client Portal, you will need to select the 'Sign In' option and enter your current MYOB login and password.



This is also the view you will see when accessing the Portal from the Colville Williams website.

'Two Factor Authentication' (2FA) may be required for access to the Portal. This will provide an additional layer of security. You can set this up to be sent via email or to your phone. Using your phone is more secure, however it requires some setup of an authenticator app. We can provide you with a detailed guide if needed.

We are here to assist you so please call on 03 9432 0777 or reply via email to mail@colville.com.au to notify us if you need any assistance.