

CLIENT PORTAL

A BETTER WAY TO SEND, RECEIVE AND SIGN DOCUMENTS

WELCOME TO THE CLIENT PORTAL

Benefits to you

Unprecedented access to data, such as financial statements and income tax returns

- Access your relevant documents 24/7
- Better security than email
- Easily transfer files to us – no need to deliver your accounting data file or scanned documents to our office, simply upload from your location
- Ability to sign documents electronically and have the signed document automatically sent back to us

ACCESSING THE PORTAL FOR THE FIRST TIME:

You will receive an email invitation from us 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.

WHEN WE UPLOAD A FILE FOR YOU:

- You will receive a notification via email with a link to the portal
- Click the link and enter your logon and password
- Access your documents and download as needed

BY SELECTING A FILE YOU CAN CHOOSE TO:

- Preview – this will open the file in the website to enable viewing
- Downloading – this will download the file to your computer

SIGNING A DOCUMENT:

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.

YOU CAN ALSO UPLOAD FILES TO US:

Use the same logon and password – <https://portal.hownowhq.com>

Documents can be uploaded to the portal for us to access. From the documents tab, select upload file which will open file explorer, select the file(s) you wish to upload and click open. 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.

ANY QUESTIONS?

If you need any assistance setting up your Client Portal or if you have any questions about this tool, please let us know. We are here to help. Contact us on 02 9135 8450. www.pretiumsolutions.com.au

