

BMC Accounting Portal

Client Guide

Thank you for using the client portal.

Communication is faster and safer using the portal than emails.

Some things to remember

REMEMBER YOUR PASSWORD

1. It's important to remember your password, we can't tell you what it was but we can send you a re-set email if you forget it

FORGOT YOUR USER NAME

2. Your user name is shown in the emails we sent and we can tell you what that is if you forget it.

LINK TO THE CLIENT PORTAL

3. Each operating system has its own way of doing things. If clicking on the links in our emails doesn't work, copy and paste the link from one of the emails sent to you to log in – or - There is a link to the client portal on our website www.bmcaccounting.com.au

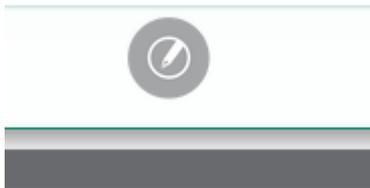
DOWNLOAD AND SAVE - DOWNLOAD AND SIGN THE DOCUMENTS.

4. We don't keep your documents on the portal for ever. When you upload a document, we will move it to our system. When we send you a document, you can download it and delete it or sign it if requested. We will remove it once it is signed or not needed. This is to keep the portal usable and not too full.
- 5.
6. You cannot digitally sign a document until it has been downloaded and read.

Download a Document by double clicking on it and then clicking on the icon shown below.



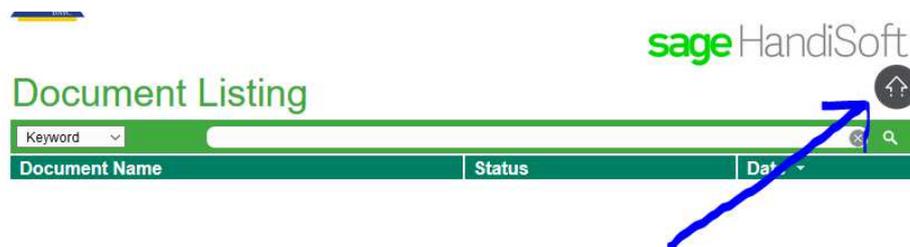
Once it has been downloaded the Icon below will be activated and allow for Digital signature.



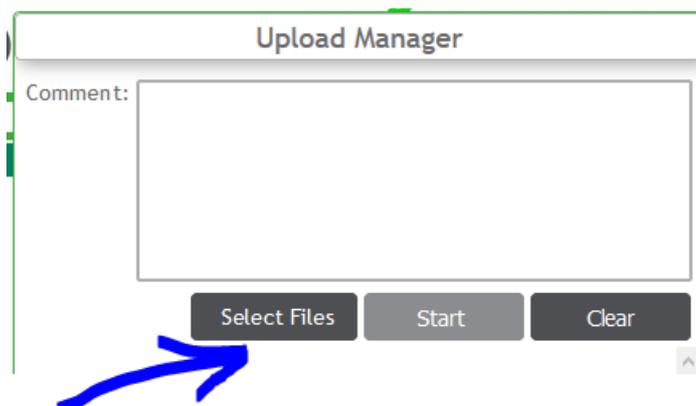
The system will capture some details about you that are unique including IP address and Machine ID that allows the ATO to accept that you approved the document. Nothing sensitive is captured.

UPLOADING DOCUMENTS

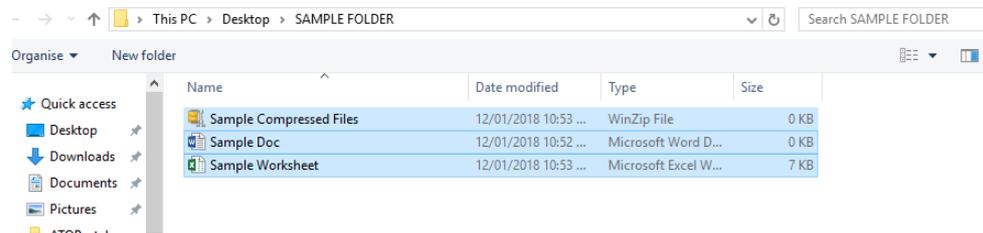
7. The client portal allows you to upload documents and automatically advises the accountant allocated to your file, that you have sent documents or data for their attention. The system also allows you to add a message at the same time.
8. Open the Client Portal using the link from our website www.bmcaccounting.com.au, your user name and password.
9. If more than one folder is shown, open the entity that you wish to add a document to.
10. Click on the Up Arrow as below.



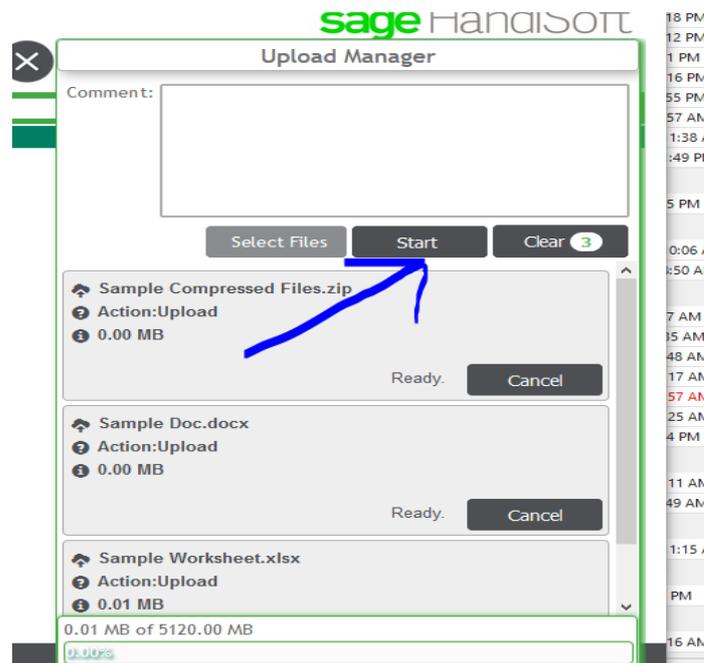
11. In the window that opens click on "Select Files"



12. Navigate to the documents that you wish to Upload and select the document or group of documents. Then select “Open”



13. Once the system advises that it has finished you can add a comment if needed and select “Start” as shown below.



14. Once uploaded, your documents appear in the portal folder and a message is sent to your Accountant at BMC with any message you added, and a list of documents for their attention.
15. If you log in and again and the document is gone BMC have moved it to their system. If it is still there, click on the document and can check if BMC have read the document, Delete it, Download it back to another computer, or email it elsewhere.

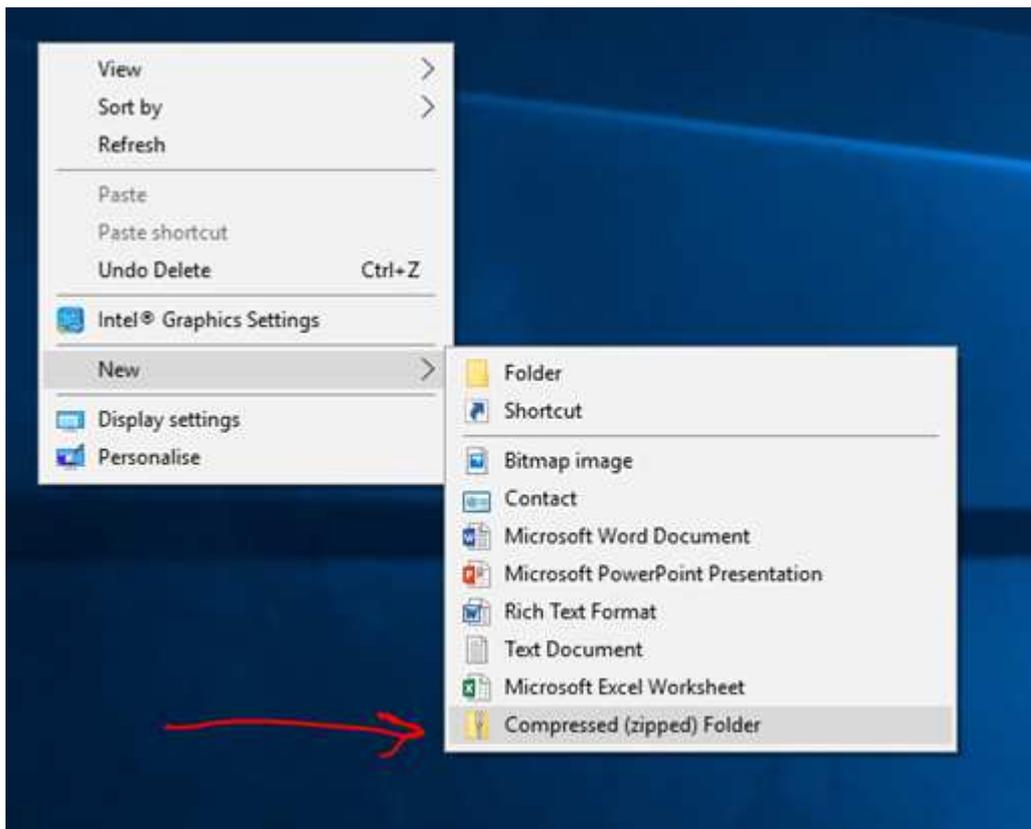
IF YOU CANNOT LOAD LARGE DOCUMENTS

16. Uploading multiple or unusual documents may give you an error. Note: Non Zipped directories or folders cannot be uploaded. When a document is added to the portal, the other party receives a notice that there is a document requiring Action. A separate notice is sent for each document.

To make larger numbers of documents transfer at one time, either Copy and Paste documents in Batches, OR better still, create a ZIP folder suitably named, and add a batch of documents to each ZIP folder.

To Create a ZIP Folder, (this procedure may vary depending on your operating system. If you need help, Google “How to Create a ZIP folder in Windows ??”)

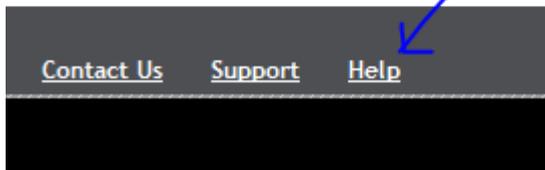
Go to your Desktop, Right Click, Select “ New” Then “Compressed (Zipped) Folder” Name the Folder, eg “5 Example Street Docs”



Drag and Drop all the documents that you want to upload together into this folder. Add the folder to the portal in the normal way.

MORE HELP

There is a Manual Available from inside the portal by clicking here when logged in



Or you can follow this link

<https://cloud1.sagehandisoft.com.au/ClientPortal/Content/Help/index.html>

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