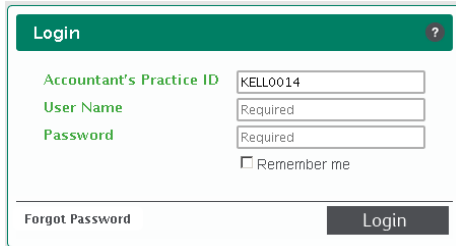# Client Portal Tips

A significant benefit for our clients using the portal is the ability to sign and return documents electronically and in a single process. When we add a document to your portal, you will receive a notification email advising that a document has been uploaded to your portal for signature. The email will provide details of the new document, a link to the portal login page and signing instructions.

To electronically sign documents:

Access the portal

Following the client portal activation process, you can login directly to our client portal site: https://cloud1.sagehandisoft.com.au/ClientPortal/Account/Login/KELL0014 or follow the link in your notification email. Alternatively, there is a client portal link on the front page of our website: www.kellyassoc.com.au

Login

To login, complete the following:
Accountant's Practice ID – KELL014
User Name – provided during the activation process
Password – set up during the activation process.

If you have trouble locating your user name or password please contact us or use the 'forgot password' option on the login screen.

Select Portal Area (relevant only to business clients with multiple portal accounts)

Select Document

From the 'document listing' page, locate and then select the new document that requires signature. This will take you to the 'document details' page.

 'Signature required' icon:
The red pencil identifies that a document requires your signature.

 'New mail' icon:*
The red envelope identifies a new document in your portal. Once you have viewed the document the new mail icon will disappear.
The client portal is undergoing constant improvement. The new mail icon is not yet available but will be introduced in the near future.

Download Document

From the 'document details' page, download the document so that you can view it. You will not be able to electronically sign a document until it has been downloaded (viewed).

 'Download document from portal' icon

Review and Sign Document

Once you have reviewed the document and are ready to sign, click the 'sign document' icon to complete the signing process. By selecting 'sign document' you are certifying that:
- The information you are submitting is true and accurate
- You have read and understood the contents of the document
- You agree with all the declarations made within the document.

 'Sign document' icon

The Document has been Signed

We will be notified automatically that you have signed the document and a 'signature stamp' (stating your name, date and time that you signed and the above certifications) will attach to the original document.

 'Document has been signed' icon:
The green pencil identifies that a document has been signed.

Portal assistance required?

We trust you will find the client portal beneficial and convenient. If you experience problems with the portal at any stage please contact us and we will be pleased to help.

There is a short instructional video which you can find on our website (select the client portal link) and also at the end of the client portal activation email.