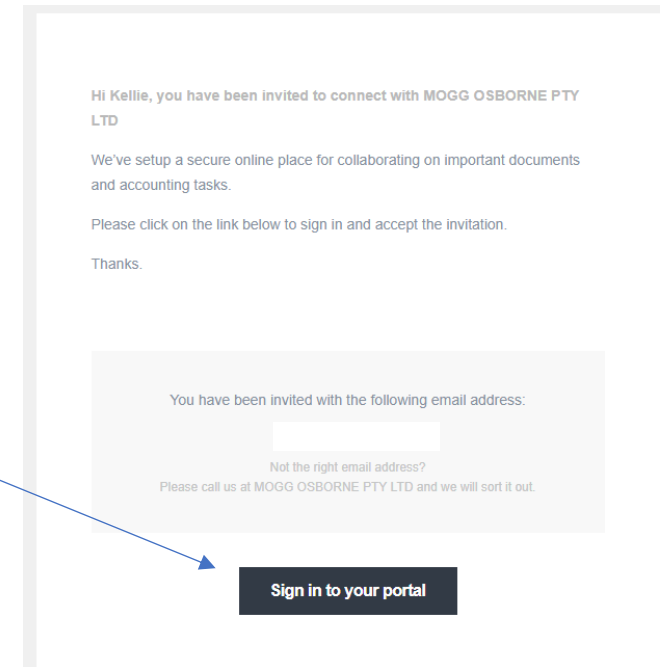


Using your Moggs Accounting Client Portal

When Moggs Accounting create a portal for you, you will receive an email inviting you to connect with us.

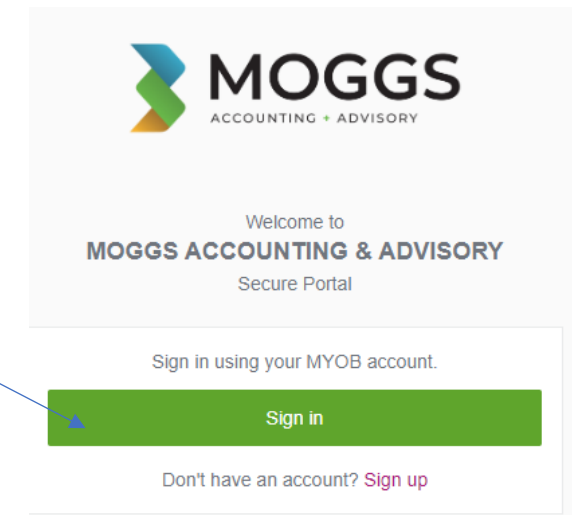
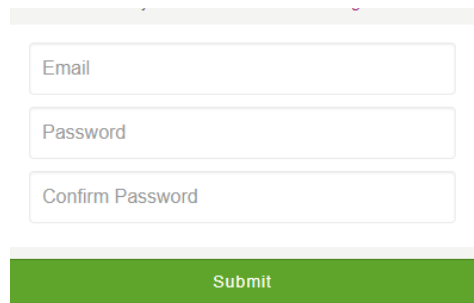
Click on the **Sign in to your portal**



A webpage will open click on the green **Sign up** button

You will be asked for your email address and to setup a password.

Please ensure this password is strong, e.g you should have at least one Capital letter, a number & a symbol.

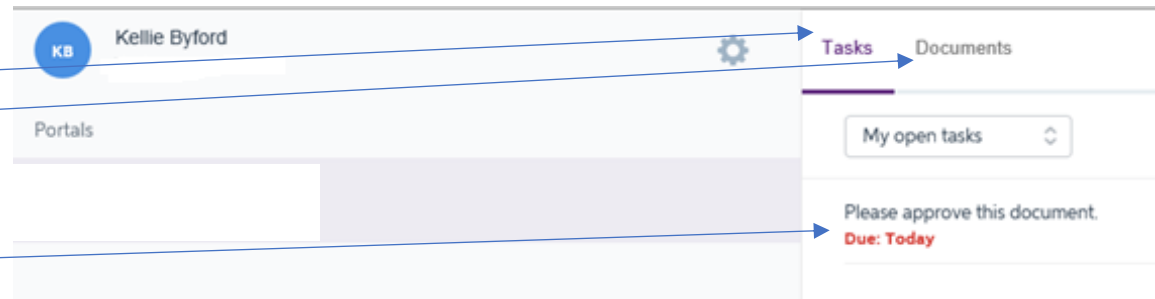


If you do not receive the email please click on this link to take you to the portal <https://moggosborne.portal.accountants/login>

We suggest saving this webpage in your favourites or on your desktop so you can access your portal at any-time in the future.

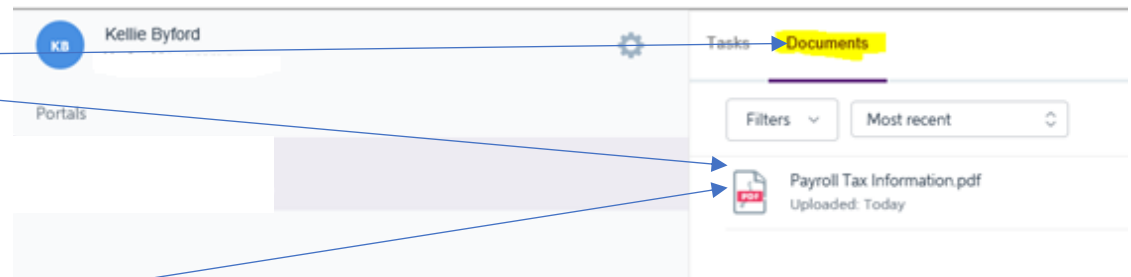
Your portal is made up of 2 areas;

1. Tasks
2. Documents



Task Tab - If we require you to sign a document such as your Tax Return a Task will appear for you to approve (sign)

Documents Tab – If we are uploading documents for you to view or you are uploading documents that we have requested they will appear here.

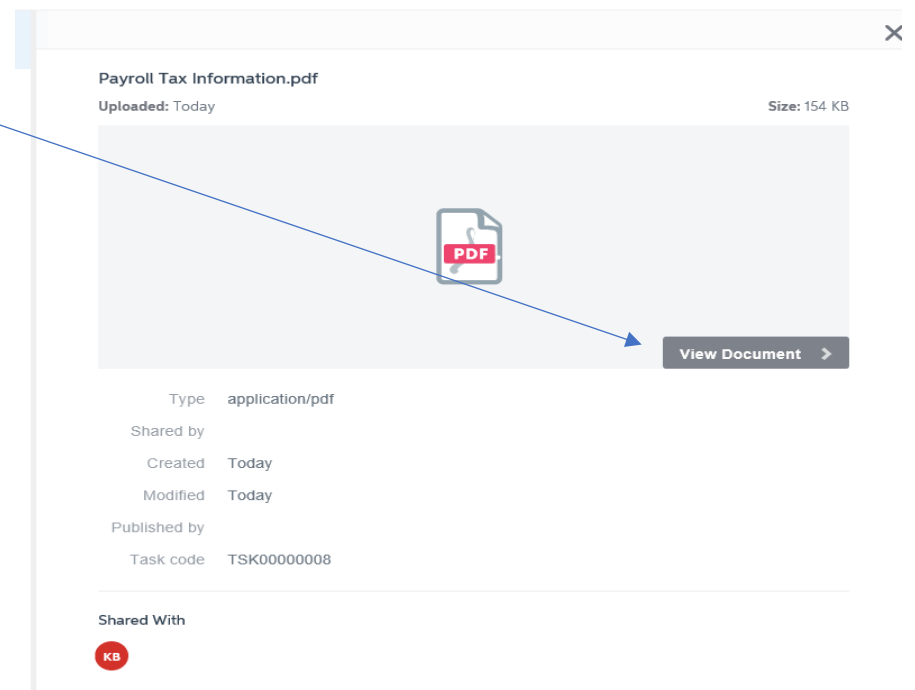


To view a document, click on the document and then click view document

- The document will open in a new browser window
- You can save the document to your computer or print the document.

In the top right-hand corner of the document you should see the following icons

- The down arrow means you can save the document on to your computer
- The printer icon means you can print the document.



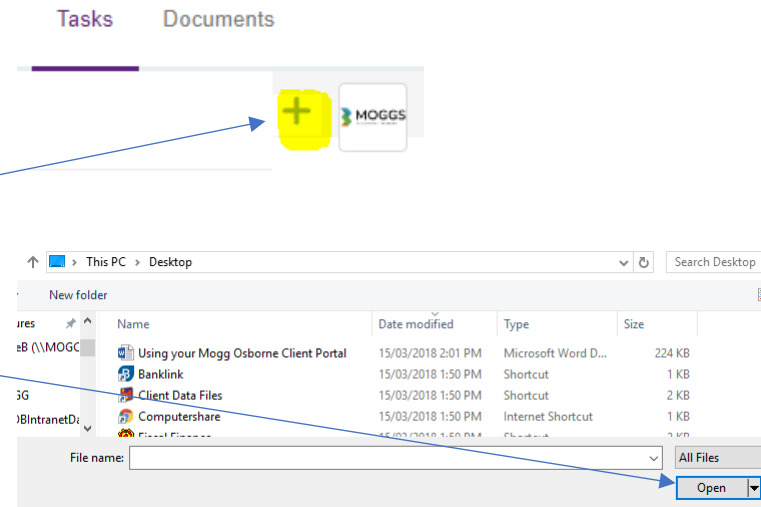
Note: This may vary depending on what browser you are using, the above example is Using Chrome

Uploading a document to Moggs

To upload documents to your Portal do the following;

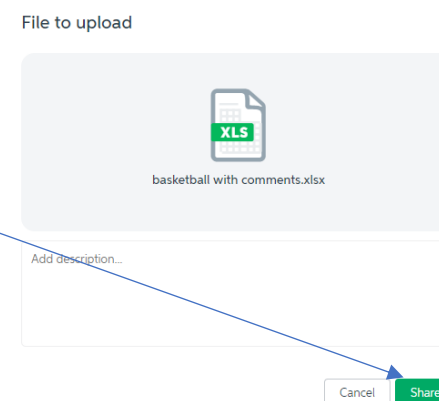
In the top right-hand corner you will see a + button
 Click the + button and then browse to the location of the file you want to upload select the document and click open

Note: To select multiple files, click on the first one, hold down the Shift key and click on the last document, this will select them all and upload them all together.



The file upload window will appear and have your file attached, type a comment in the Add description box and click on the Share button

Your file will be uploaded.

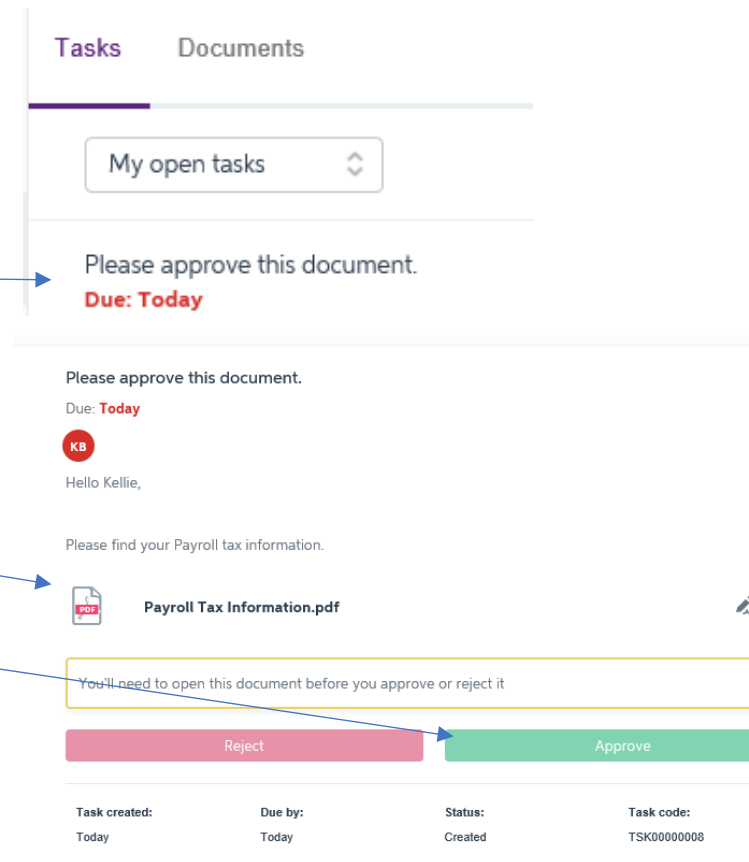


Digitally signing a document

If we require you to sign a document, such as your Tax return, BAS or IAS
You can do this from the Task Tab.

We will create the task at our end and it will appear as follows;

- Click on the task



You must open and view the document before you can approve it.

- Then close the window and the buttons will now be active
- To sign the document, you click on **Approve**.

The Approve Document window appears
-The window confirms that you are authorised to sign
Click **Approve** again to sign the document.

