

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	Hi Kellie, you have been invited to connect with MOGG OSBORNE PTY LTD We've setup a secure online place for collaborating on important documents and accounting tasks. Please click on the link below to sign in and accept the invitation. Thanks.
A webpage will open dick on the green Sign up butten	You have been invited with the following email address: Not the right email address? Please call us at MOGG OSBORNE PTY LTD and we will sort it out. 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.	
Email Password	Welcome to MOGGS ACCOUNTING & ADVISORY Secure Portal
Confirm Password Submit	Sign in using your MYOB account.
	Don't have an account? Sign up

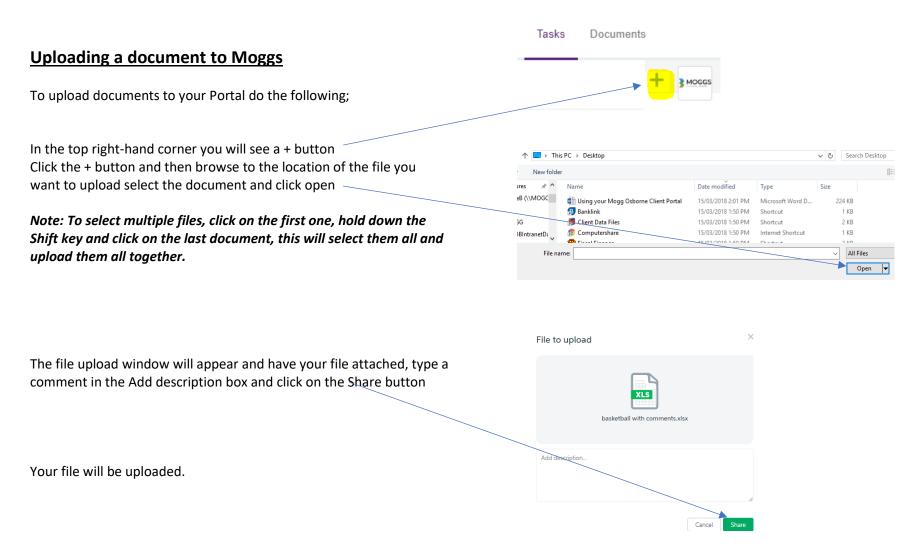
If you do not receive the email please click on this link to take you to the portal <u>https://moggosborne.portal.accountants/login</u> We suggest saving this webpage in your favourites or on your desktop so you can access your portal at any-time in the future.



Your portal is made up of 2 areas;	кв К	Kellie Byford			¢	Tasks
1. Tasks 2. Documents	Portals					My open tasks
Task Tab - If we require you to sign a document such as your Tax Return a Task will appear for you to approve (sign)						Please approve this document. Due: Today
Documents Tab – If we are uploading documents for you to view or you are uploading documents that we have requested they will appear here.	Ка	ellie Byford			Tasks 🍃	Documents
	Portals				Filter	s v Most recent C Payroll Tax Information.pdf Uploaded: Today
To view a document, click on the document and then click view docur			Payroll Tax Inf	ormation.pdf		×
 The document will open in a new browser window You can save the document to your computer or print the document. 			Uploaded: Today		2	Size: 154 KB
In the top right-hand corner of the document you should see the follow	-	5		P	DF	
-The down arrow means you can save the document on to your compu -The printer icon means you can print the document.	er -		Type Shared by	application/pdf		View Document
Note: This may vary depending on what browser you are using, the abo Using Chrome	ove examp	ole is	Created Modified Published by Task code	Today Today TSK0000008		
			Shared With			

КВ







Digitally signing a document	Tasks Documents				
If we require you to sign a document, such as your Tax return, BAS or IAS You can do this from the Task Tab.	My open tasks 🗘				
We will create the task at our end and it will appear as follows;	Please approve this document.				
- Click on the task	Due: Today Please approve this document. Due: Today KB				
 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. 	Hello Kellie, Please find your Payroll tax information. Payroll Tax Information.pdf				
	You'll aread to open this document before you approve or reject it Reject Approve				
	Task created: Due by: Status: Task code: Today Today Created TSK0000008				
The Approve Document window appears	Approve documents ×				
-The window confirms that you are authorised to sign Click Approve again to sign the document.	 By clicking Approve you'll digitally sign these documents, and declare that: You're the document signatory, or are authorised by them to sign on their behalf Only authorised people have access to sign these documents The signatory has checked that these documents are authentic and accurate 				
	Cancel Approve				