

Introduction to Our Portal

A better way to send, receive **and sign documents**

We have recently installed a client portal to enhance our service to you!

[Click here to access the 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 (the email will be from Our Firm via HowNow Portal portal@hownowhq.com), 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 client 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, the actions after download will depend on the browser that you are using

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 receive an email with a link to the document that requires your signature. Click on the link and the document will open on the screen. Once you have read and are happy with the document, click on the Start button which will take you to the area where your signature is required.

Click in the signature area and type in your signature. Once all signature areas have been completed, press Click to Sign.

Once signing is complete by all parties a copy of the signed document will be saved on your portal. You can access the document at any time by logging in to the portal.

You can also upload files to us

[Click here to login](#)

Use the same details to logon as you have previously, which will allow you to upload documents 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. If you have access to multiple entities, select the one you wish to upload the file to.

Hint: If you wish to upload to a particular filter, click on the filter prior to uploading. 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.

Resetting your password

If you have forgotten your password, select "Forgotten Password" on the portal login screen and you will receive an email with a link to reset your password. If you wish to change your portal password, this can be done from your Profile (the person image) on the top of the website.

Do you need further help?

[Contact our team](#)

Alternatively, select the **?** at the top of the Portal website. Should you have problems using the portal, please contact our office on 1800 988 522 **or** cnmail@cutcher.com.au