

With security and privacy concerns increasingly prevalent in today's marketplace, McGarry Partners has implemented a secure client portal for the transmission of financially sensitive electronic files.

The portal can be used to transmit any kind of electronic document – MYOB files, Quickbooks files, Excel Spreadsheets, Picture files, etc.

The secure client portal provides many benefits, including:

- A secure pipeline for the transfer of sensitive client information
- The ability to upload and download files
- The ability to access files easily from any location in the world
- The provision of document receipt and delivery confirmations
- The protection of using a secure transfer facility rather than sending via email attachments
- · The ability to control file access via usernames and passwords

These instructions have been drafted to help get you started. Please do not hesitate to contact our Portal Administrator on 07 3217 2477 should you require any assistance whatsoever.

Table of Contents

Accessing Your Secure Area for the First Time	2
Accessing Your Secure Area Generally	4
Uploading Files	5
Viewing Uploaded Files	8
Viewing Files Uploaded by McGarry Partners	9
Changing Your Details 1	10
Forgotten Your Password 1	11
Forgotten Your Username 1	12
General Queries 1	12

Accessing Your Secure Area for the First Time

Once your personal secure area has been created, you are ready to send and receive electronic files.

1. You will receive an automatically generated email notification containing your username, a temporary password and a link to access the login site.



2. Click the link to access the login screen and enter the details supplied in the email.

New Secure	Area Web Address	
We have recent	ly moved our secure area to a new web server. Our secure area is now access	ible by a new web address:
https://mcgarry	partnerssecure.sites.acclipse.com/	
Please update	your bookmarks.	
Secure Area	a	
Please enter yo	ur username and password below to login to the Secure Area of our website.	
Username: Password:	sam.ample@gmail.com	
	Login	
This is where o financial report:	ur clients can login to their own personalised secure area to access documents 5.	s, files, accounting data and

3. Upon your first login, you will be prompted to reset your password. We recommend that you change this to something personalised yet secure.

Password Reset Required
You have logged in using a temporary password. Please reset your password before continuing to the Secure Area of our website.
New Password:
Confirm New Password:
Save

4. Once your password has been changed, you will be directed to your secure area main screen. From here, you can navigate using the tabs on the top link bar.

Secure Home	Documents	Upload Files	User Details	Logout	
Welcome -	Sample				
Welcome to y	our personalised,	, secure area of ou	ır web site.		
We're excited access to you	about this develo r files, documents	pment in our acco s, accounting data	unting practice and and financial repor	the opportunity w ts.	e have to extend our service to offer 24/7
We welcome	any feedback on (other Internet servi	ces you would valu	e.	
Best regards,					
McGarry Partn	ers				

Accessing Your Secure Area Generally

1. The Client Portal can always be accessed via the link on the McGarry Partners website: <u>www.mcgarrypartners.com.au</u>

McGarry Partners is a progressive fir servicing the needs of a diverse rand	m of Chartered Accountants that has been
Services since 1978.	> May-June 2010
	> February-March 2
 Professional Services 	Taxation Planning
 Accounting Services 	Financial Planning
 Auditing Services 	Estate Planning
Management Services	Succession Planning
Superannuation	Inward Investments

2. Alternatively, you can add the web address (URL) to your favourites by selecting the 'Favourites' button and selecting 'Add to Favourites...'.

🥖 heade	er - Wi	ndows I	nternet Explo	orer prov	ided by McGarry Partne	ers
) - (🦲 http	s://mcgarry	partnerss	ecure.sites.acclipse.cor	n/
File	Edit	View	Favorites	Tools	Help	
🔶 Favo	orites) 🏉 H	ieader			
👍 Add	l to Fa	vorites	•			4

3. Enter the name 'McGarry Partners – Client Portal' so it is easily recognised for future access.



4. To access the portal via your 'Favourites', simply click the 'Favourites' button and select the link.



Uploading Files

- 1. Click the 'Upload Files' tab on the top link bar.
- 2. Click in the empty cell then click the 'Select' button to choose a file for upload.

pload Files - Sam	ple
nis is where you can se	nd confidential documents and your accounting data files in a safe and secure environment.
o send a file, simply clic ould like the file saved i utomatically receive an	k on the "Browse" button to locate the document or file on your computer, then choose the folder you into. Once you click on the "Send File" button, the file will be uploaded to your secure area and we w email letting us know it's there.
	Select Remove
	Select Remove
	Select Remove
Add	
Send to folder:	

3. Locate and select the file you wish to upload and click 'Open'.

Choose File to Upload						×
😋 🗢 📕 « Document	s ▶ Up	oloads		▼ 4 9 Se	arch	Q
🖣 Organize 👻 🏭 Views	- 📑	New Folder				0
Favorite Links Favorite Links Favorite Links Folders Folders Folders My Victures My Videos MyHeritage Scanned Documen Updater5		ame	Date modif xt Document.d	Type oc	Size	Tags
File name:	- Sample	Text Docume	nt.doc	•	All Files (*.*) Open	Cancel

4. Repeat the process in the next available cell if additional items are to be transmitted.

Secure Home	Documents	Upload Files	User Details	Logout					
Upload File	s - Sample								
This is where y	This is where you can send confidential documents and your accounting data files in a safe and secure environment.								
To condición									
would like the t	simply click on tr file saved into. O	ne "Browse" buπo nce you click on t	n to locate the doc he "Send File" butti	ument or file on yo on, the file will be i	our computer, then choose the folder you uploaded to your secure area and we will				
automatically r	eceive an email	letting us know it	s there.						
Sample Text [Document.doc	Select 🗱	lemove						
		Select 🗶	lemove						
		Select 🗱	lemove						
	_								
Add									

5. Click the 'Add' button if sending more than 3 files at a time – a maximum of 5 files (or a combined size of 200MB is allowed).

iis is where you can send con	fidential doc	uments and yo	ur accounti	ng data file:	s in a safe a	nd secure	environment.	
) send a file, simply click on th ould like the file saved into. Or	ie "Browse" b nce vou click	outton to locate on the "Send F	the docum ile" button	ent or file oi the file will l	h your comp de uploader	uter, then I to your se	choose the fol ecure area ani	lder you d we wil
itomatically receive an email l	etting us kno	w it's there.	ne ballon,	uie me win i	Je upioauec	1 to your se	cule alea alli	7 446 4411
Sample Text Document.doc	Select	X Remove						
Sample PDF Document.pdf	Select	X Remove						
Sample Excel Document.xls	Select	Remove						
Sample Presentation Docume	Select	Remove						
Sample JPEG Document.jpg	Select	X Remove						
Andre								
4010								

6. Click 'Send Files' once ready to transmit.

his is where you can send cor	nfidential docu	iments and your acc	counting data files i	n a safe and secure environment.	
o send a file, simply click on th	ne "Browse" b	utton to locate the d	ocument or file on y	our computer, then choose the folder	yo
ould like the file saved into. Or	nce you click o	on the "Send File" bu	utton, the file will be	uploaded to your secure area and w	e w
utomatically receive an email I	letting us knov	wit's there.			
Sample Text Document.doc	Select	X Remove			
Sample PDF Document.pdf	Select	*Remove			
Sample Excel Document.xls	Select	Remove			
Sample Presentation Docume	Select	Remove			
Sample JPEG Document.jpg	Select	*Remove			
Add					
Add					
Send to folder:					

7. The upload progress bar will appear. Depending on the file size, this may take several minutes to complete.

Secure Home	Documents	Upload Files	User Details	Logout	
Upload Files	s - Sample				
This is where y	ou can send cor	nfidential docur	nents and your acco	unting data files i	n a safe and secure environment.
To send a file, s would like the fi automatically re	simply click on th ile saved into. Or aceive an email l	ne "Browse" bu nce you click or etting us know	tton to locate the doo n the "Send File" but it's there.	cument or file on y ton, the file will be	your computer, then choose the folder you uploaded to your secure area and we will
Sample Text D	ocument.doc	Select	Remove		
Sample PDF D	ocument.pdf	Select	Remove		
Sample Excel I	Document.xls	Select	Remove		
Sample Preser	ntation Docume	Select	Remove		
Sample JPEG [Document.jpg	Select	Remove		
Add]				
Uploaded :	25% (168.00kB) To	otal 666.74kB			
Uploaded 1	files: 20% (1) Total	l files: 5)	

8. Once files have been successfully transmitted, a list of the uploaded files will appear beneath the 'Add' button:

Secure Home D	ocuments	Upload Files	User Details	Logout		
Upload Files - :	Sample					
This is where you o	an send con	fidential docume	nts and your accou	nting data files i) a safe and secure envir	onment.
To send a file, sim would like the file s automatically recei	ply click on th aved into. Or ve an email li	e "Browse" butto nce you click on th etting us know it's	n to locate the docu ne "Send File" butto s there.	ument or file on y n, the file will be	our computer, then choos uploaded to your secure	se the folder you area and we will
		Select XR	emove			
		Select XR	emove			
Add						
Uploaded files: Sample Text Docu Sample PDF Docu Sample Excel Doc Sample Presentati Sample IPEG Docu	ument.doc (22 ument.pdf (596 ument.xls (138 on Document ument.jpg (36	016 bytes) 5555 bytes) 324 bytes) .ppt (8704 bytes) 359 bytes)				

9. An email will be automatically sent to our Portal Administrator who will download the files and distribute the documents to the relevant accountant.

Viewing Uploaded Files

- To view the files you have uploaded, select the 'Documents' tab from the top link bar.
 If no files are visible, click the 'Documents' folder in the left navigation panel.

Sample				
Views 💌		Search		۾ م
avourite Links New Sample Sample Sample Documents	Name Documents	Modified ♀ 15/07/2010	Type folder	Size 662 K

3. A list of files will appear. Click the document name to open the file.

Sample				
elow are your personalised	reports and documents. You can download the	ese files at any time.		
🍌 🕨 Sample 🕨 Documen	ts			
Views 🔻		Search		م
Favourite Links	Name	Modified ≎	Type	Size
New	📓 Sample JPEG Document	15/07/2010	jpg	36 K
Sample	📓 Sample Presentation Document	15/07/2010	ppt	9 K
	🗐 Sample Excel Document	15/07/2010	xls	14 KI
	Sample PDF Document	15/07/2010	pdf	583 K
4 Sample	🗐 Sample Text Document	15/07/2010	doc	22 K

Viewing Files Uploaded by McGarry Partners

You will receive an automatically generated email notification advising that a file has been uploaded by McGarry Partners.

1. Click the link contained in the email and complete login screen.



2. The file will be listed under your Documents.

iow are your personalis	ed reports and documents. You can download these	files at any time.		
▶ Sample ▶ Docur	nents	Comple		
		Search	-	4
Isample ▷ Documents		Modified ₹	lype	Size
	Sample IPEG Document	15/07/2010	ing	22 N
	Sample Presentation Document	15/07/2010	npt	9 K
	Sample Excel Document	15/07/2010	xls	14 K
	Sample PDF Document	15/07/2010	pdf	583 K
	Sample Text Document	15/07/2010	doc	22 K

3. Click on the document name to open the file.

Changing Your Details

1. You may change your details at any time by selecting the 'User Details' tab on the top link bar. Ensure that any changes made are saved.

Secure Home	Documents	Upload Files	User Details	Logout		
Edit your D	etails - Samp	le				
Welcome to the user details area. This page gives you the opportunity to change or update your login details and your password. When you have made the changes you need, just click on 'Save' to confirm your details.						
You may ed	it your user de	tails here.				
User Login N:	ame sam.ampl	e@gmail.com				
Name	Sam Ample	!				
Email	sam.ample	@gmail.com				
Password		•				
Re Enter Pas:	sword					
	Save					

2. Alternatively, you may contact our Portal Administrator on 07 3217 2477 and update your details over the phone.

Forgotten Your Password

1. If you have forgotten your password, click the 'forgot your password?' link on the login screen.

New Secure Area Web Address			
We have recently moved our secure area to a new web server. Our secure area is now accessible by a new web address:			
https://mcgarrypartnerssecure.sites.acclipse.com/			
Please update your bookmarks.			
Secure Area			
Please enter your username and password below to login to the Secure Area of our website.			
Username: sam.ample@gmail.com Password: forgot your password? Login			

2. A new temporary password will be emailed to you.

New Secure Are	a Web Address
We have recently mo	ved our coeuro aroa to a new web conor. Our coeuro aroa io new accoscible by a new web address:
https://mcgarrypartne Please update your t	A new temporary password has been created and emailed to the secure user "sam.ample@gmail.com".
Please enter your us	ОК
e Processing	Please wait

3. Click the link in the email to access the login screen. You will be prompted to change your password.

Compose Mail	Archive Your Files - www.recall.com.au - Keep your Documents Safe & Secure Let Us Man:About these ads < >			
Inbox	<u>« Back to Inbox</u> Archive Report spam Delete Move to ▼ Labels ▼ More actions ▼ 1 of 3 <u>Older →</u>			
Buzz S Starred 😭 Chats 🔎 Sent Mail Drafts	Secure User Password Reminder Inbox × Imbox ×			
All Mail Spam (2) Trash More ∎	Your Secure Area log in has been reset. This email contains your new temporary log in details, enabling you to log into the secure area of <u>http://mcgarrypartnerssecure.sites.acclipse.com/</u> . Your user name is the email address used to receive this message.			
Contacts Tasks	Your password is: QAd60TY3 Request Free Demo of MOVER to securely manage/encrypt data			

4. Alternatively, you may contact our Portal Administrator on 07 3217 2477 and change your password over the phone.

Forgotten Your Username

- 1. Your username is set as your email address by default.
- 2. If you have forgotten your username, you will need to contact our Portal Administrator to reset this over the phone.

General Queries

Should you have any queries or require any additional assistance, please do not hesitate to contact our Portal Administrator on 07 3217 2477.

Alternatively, you may email any queries to <u>info@mcgarrypartners.com.au</u> and we will respond by the next business day.