

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.

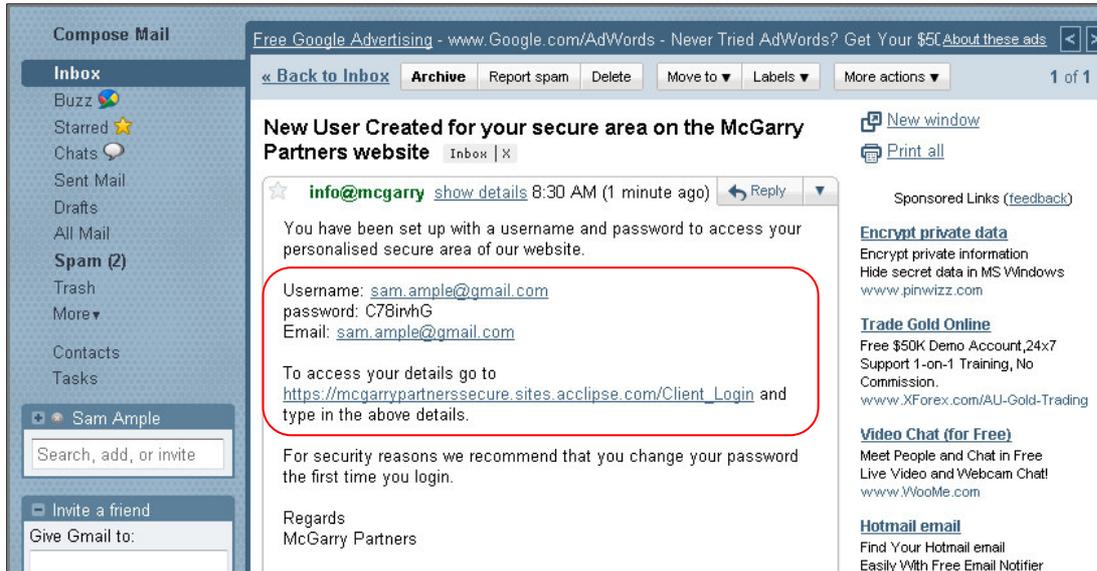
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Accessing Your Secure Area for the First Time

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

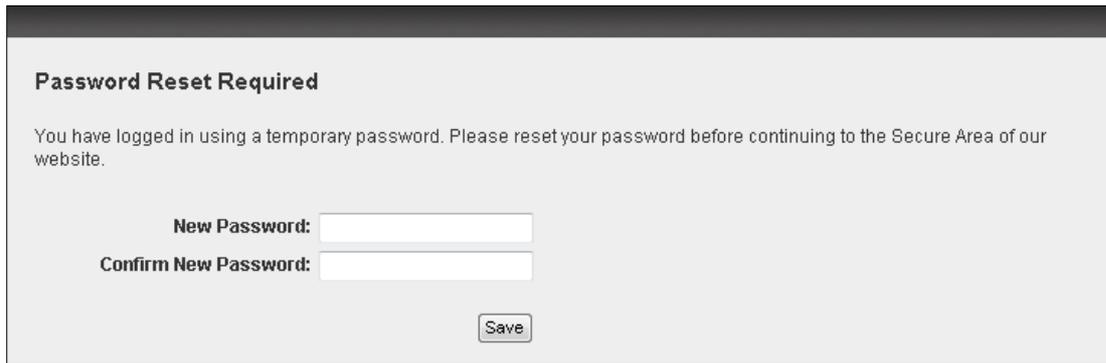
1. You will receive an automatically generated email notification containing your username, a temporary password and a link to access the login site.



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



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



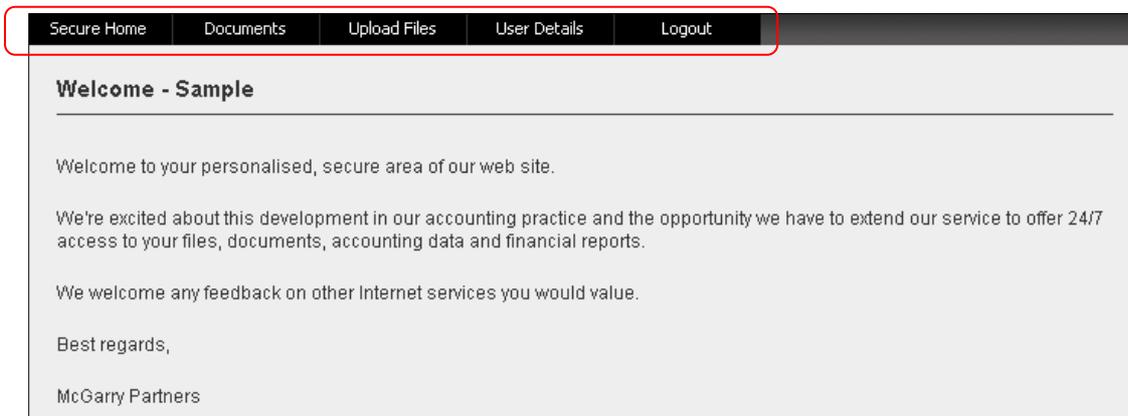
Password Reset Required

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:

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 your personalised, secure area of our web site.

We're excited about this development in our accounting practice and the opportunity we have to extend our service to offer 24/7 access to your files, documents, accounting data and financial reports.

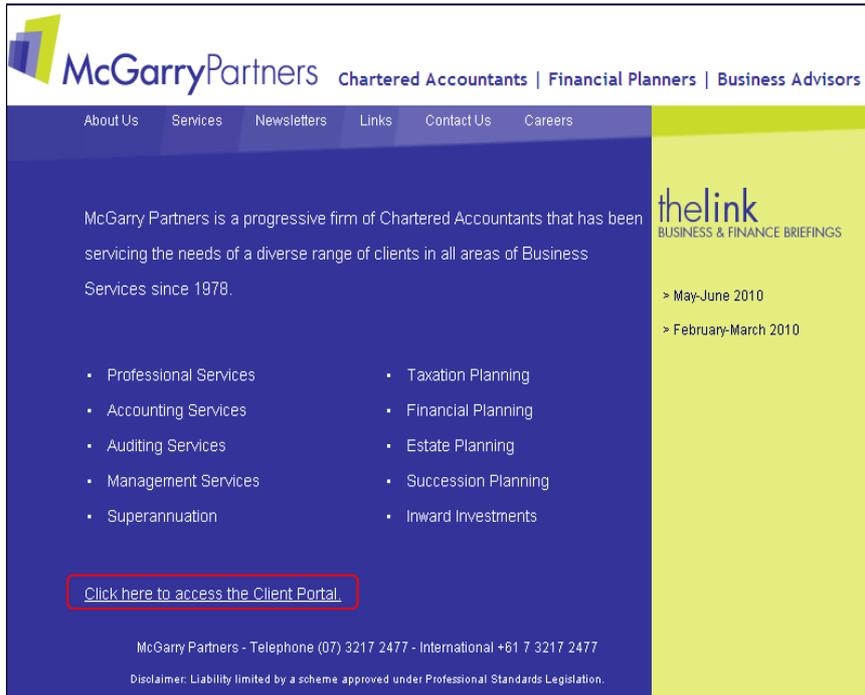
We welcome any feedback on other Internet services you would value.

Best regards,

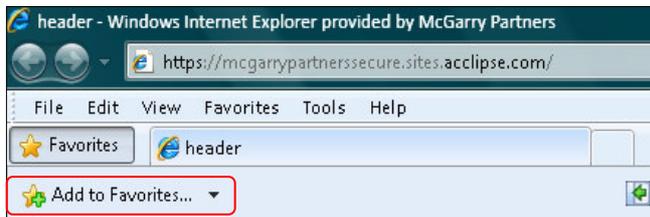
McGarry Partners

Accessing Your Secure Area Generally

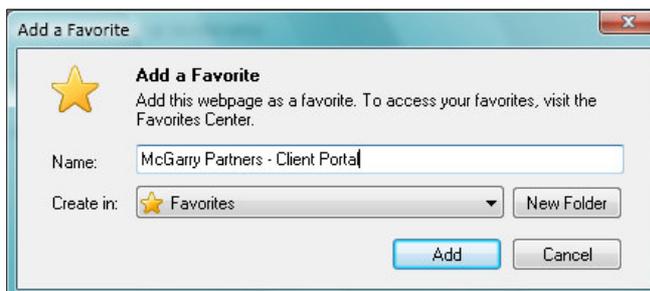
1. The Client Portal can always be accessed via the link on the McGarry Partners website:
www.mcgarrypartners.com.au



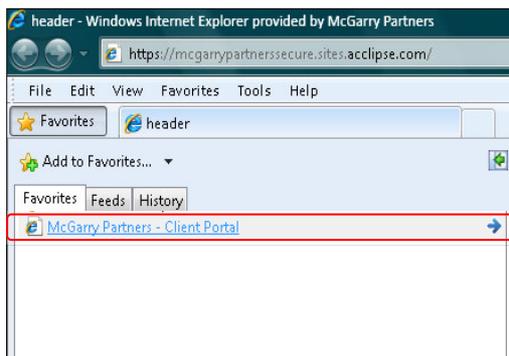
2. Alternatively, you can add the web address (URL) to your favourites by selecting the 'Favourites' button and selecting 'Add to Favourites...'



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



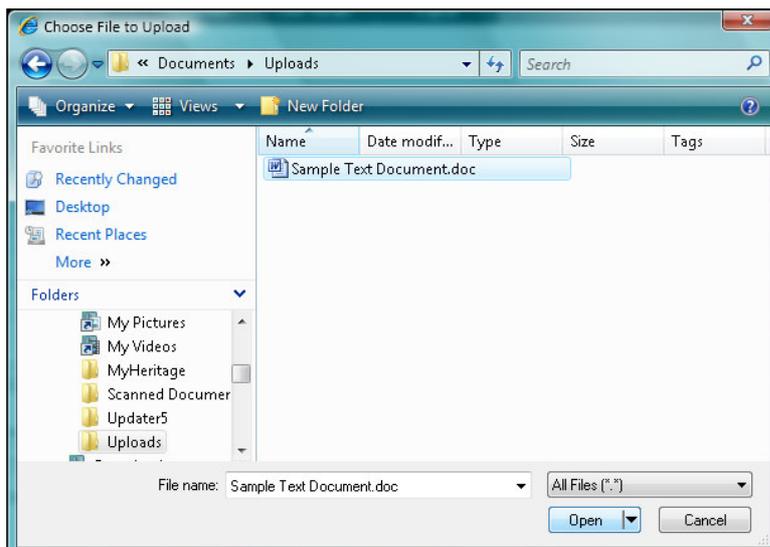
4. To access the portal via your 'Favourites', simply click the 'Favourites' button and select the link.



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.

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



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

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).

Secure Home | Documents | Upload Files | User Details | Logout

Upload Files - Sample

This is where you can send confidential documents and your accounting data files in a safe and secure environment.

To send a file, simply click on the "Browse" button to locate the document or file on your computer, then choose the folder you would like the file saved into. Once you click on the "Send File" button, the file will be uploaded to your secure area and we will automatically receive an email letting us know it's there.

| | | |
|----------------------------|--------|----------|
| Sample Text Document.doc | Select | ✖ 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

Send to folder:
Sample/Documents Send Files

Note: The largest allowed combined file size for upload is 200MB.

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

Secure Home | Documents | Upload Files | User Details | Logout

Upload Files - Sample

This is where you can send confidential documents and your accounting data files in a safe and secure environment.

To send a file, simply click on the "Browse" button to locate the document or file on your computer, then choose the folder you would like the file saved into. Once you click on the "Send File" button, the file will be uploaded to your secure area and we will automatically receive an email letting us know it's there.

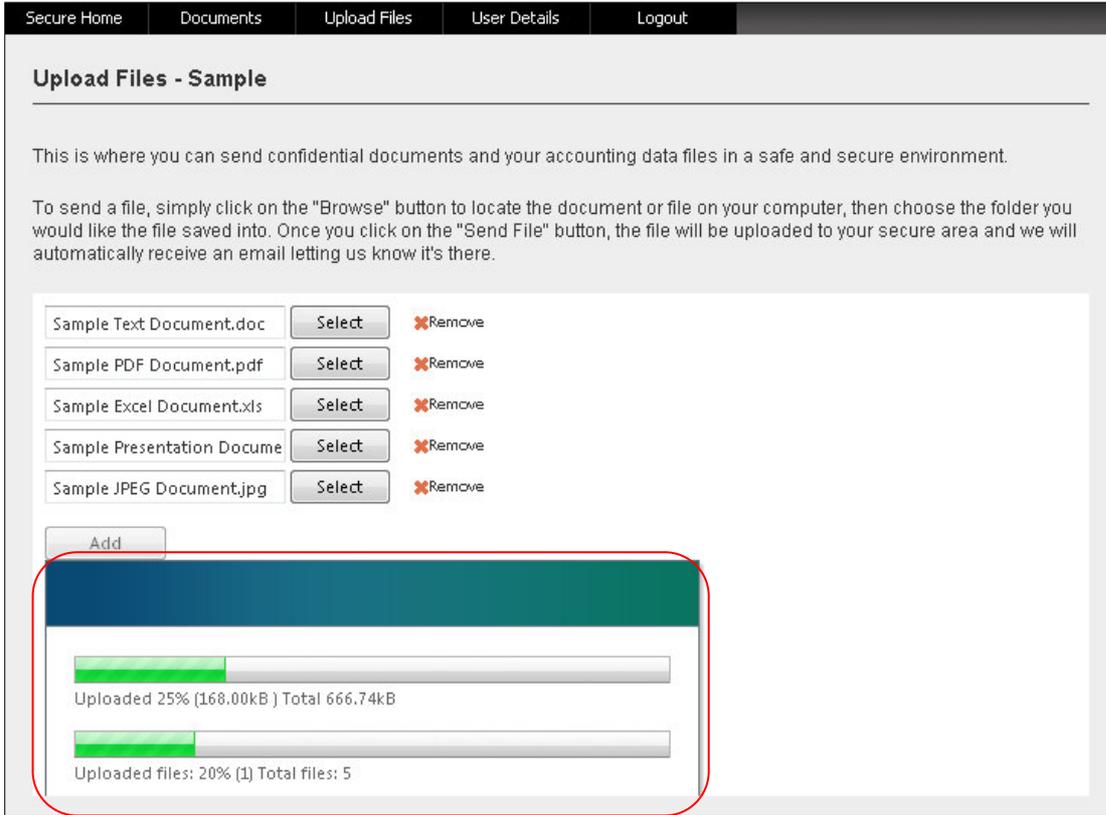
| | | |
|----------------------------|--------|----------|
| Sample Text Document.doc | Select | ✖ Remove |
| Sample PDF Document.pdf | Select | ✖ Remove |
| Sample Excel Document.xls | Select | ✖ Remove |
| Sample Presentation Docume | Select | ✖ Remove |
| Sample JPEG Document.jpg | Select | ✖ Remove |

Add

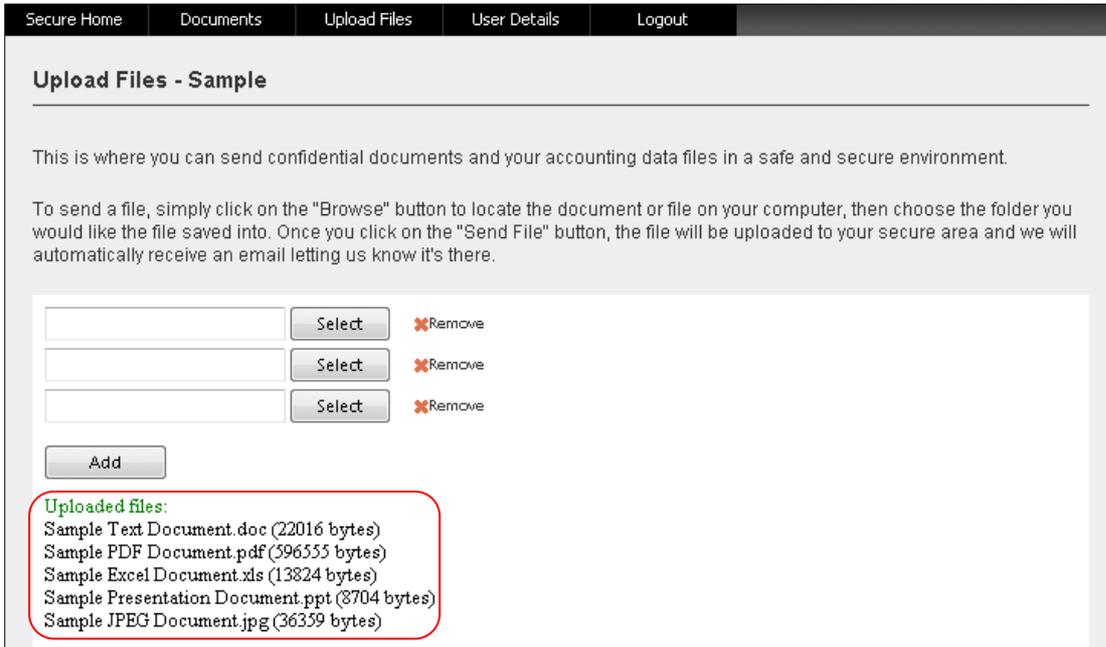
Send to folder:
Sample/Documents **Send Files**

Note: The largest allowed combined file size for upload is 200MB.

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



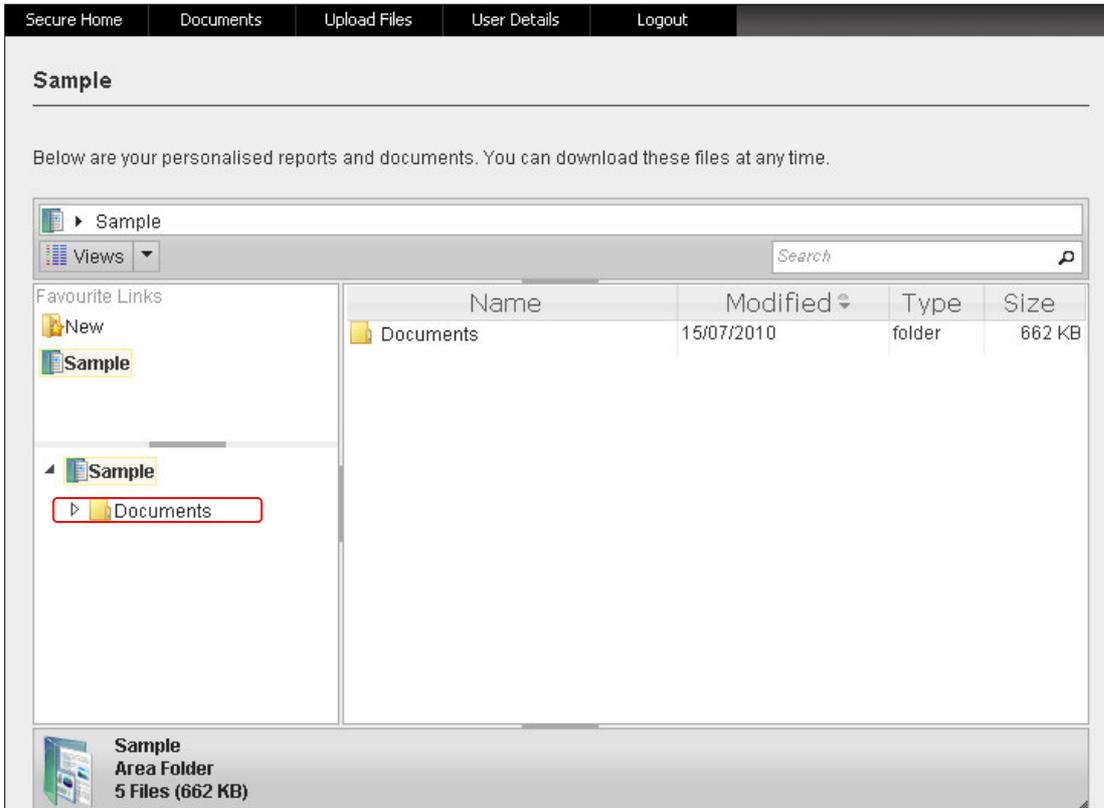
8. Once files have been successfully transmitted, a list of the uploaded files will appear beneath the 'Add' button:



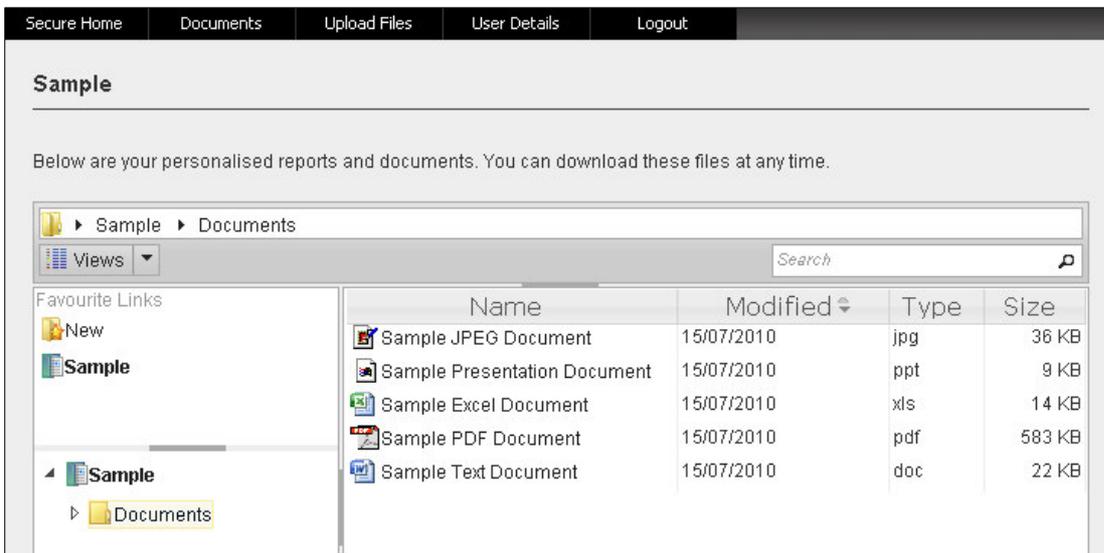
9. An email will be automatically sent to our Portal Administrator who will download the files and distribute the documents to the relevant accountant.

Viewing Uploaded Files

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



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



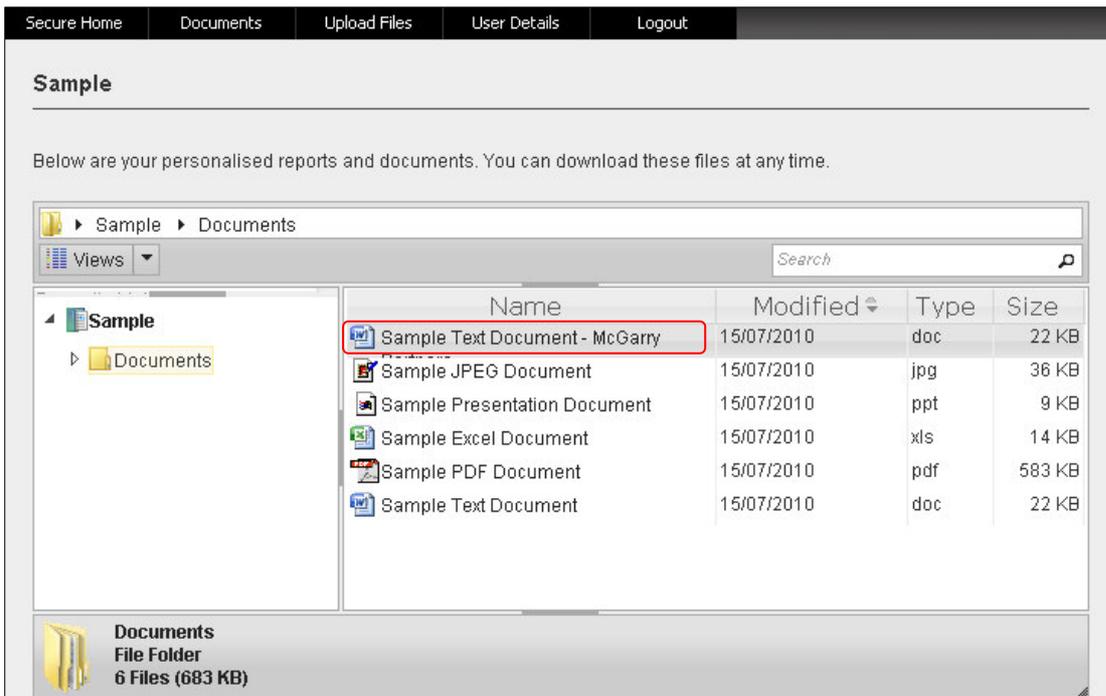
Viewing Files Uploaded by McGarry Partners

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.



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 Details - Sample

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 edit your user details here.

User Login Name sam.ample@gmail.com

Name

Email

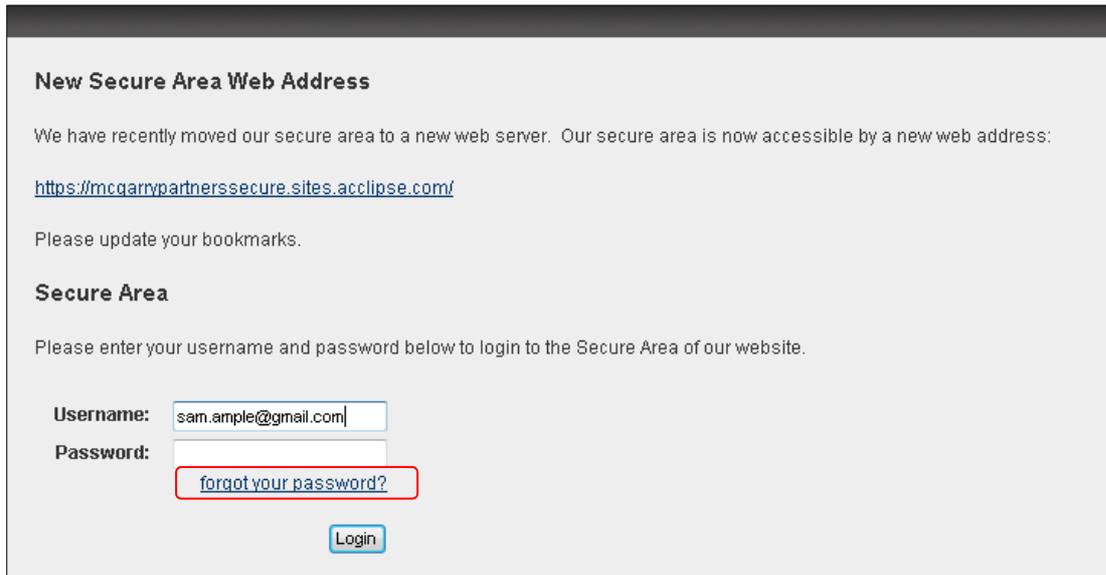
Password

Re Enter Password

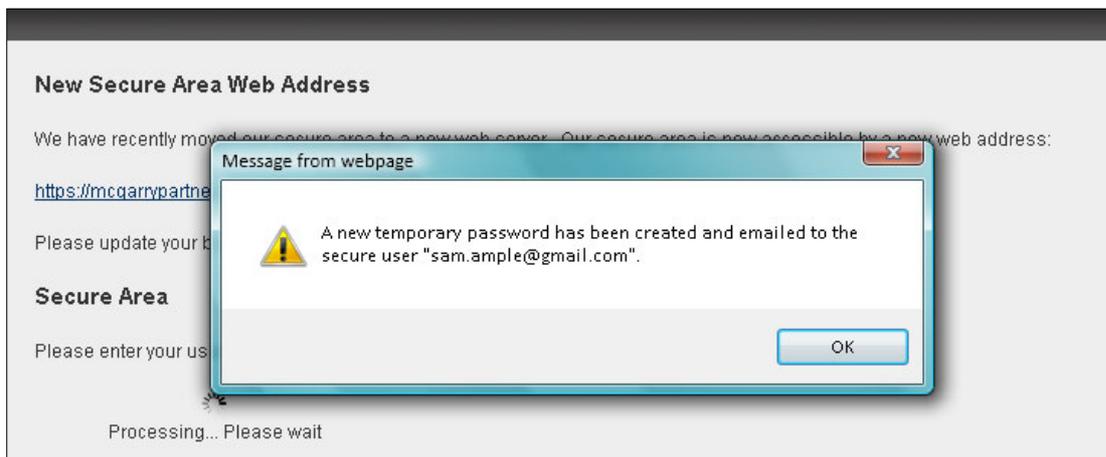
2. Alternatively, you may contact our Portal Administrator on 07 3217 2477 and update your details over the phone.

Forgotten Your Password

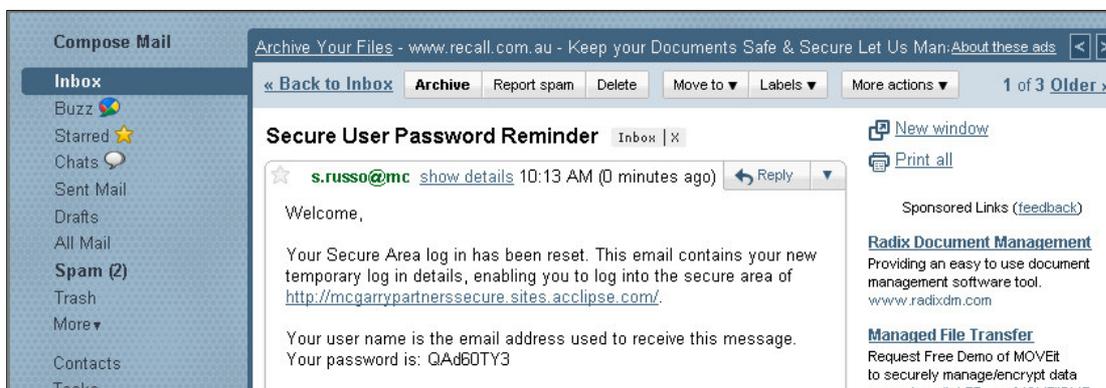
1. If you have forgotten your password, click the 'forgot your password?' link on the login screen.



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



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



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 info@mcgarrypartners.com.au and we will respond by the next business day.