

User Manual



Client Portal Instructional Video 1

How to activate your portal and log in for the first time



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STEP 1

You will receive an email inviting you to activate your client portal.

Client Portal Login Activation

Welcome to our new Client Portal

A login has now been created for you on our Client Portal System. This allows us to securely exchange documents, register, and sign documents in a legally binding way of signing documents.

To use this service, you will need to set up your account as follows:

1. Click on **Activate** below to activate your account.
2. The Password page will then be displayed to allow you to set up your password.
3. The Login page will then be displayed.

Login to your account as follows:

User Name:

Password:

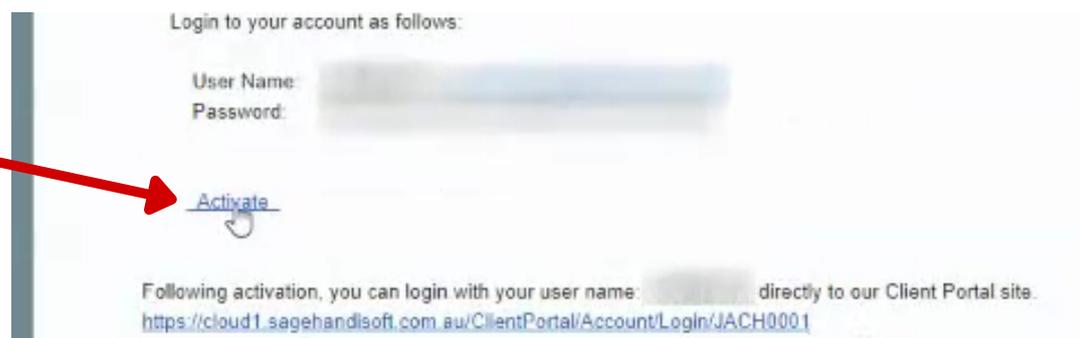
[Activate](#)

Following activation, you can login with your user name: [redacted] directly to our Client Portal site.
<https://cloud1.sagehandisoft.com.au/ClientPortal/Account/Login/JACH0001>

Click [here](#) to view an instructional video on Client Portal User functionality.

Scroll down and click on Activate.

Click on Activate, here





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STEP 2

The portal will ask you to set a password.

Ensure that you use a strong password and that you write it down. Strong passwords use a combination of upper and lower case letters, numbers and special characters (!,@,#,\$,%, etc.).

A screenshot of a web form titled 'Activate'. The form contains the text 'To finish activating your account, please select a password.' followed by two input fields labeled 'Password' and 'Confirm password', both containing masked characters. Below the fields is a blue button labeled 'OK'. Three red arrows point from the right side of the image to the two password fields and the 'OK' button.

Enter your chosen password twice.

Click OK to set your password



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STEP 3

You will now be able to log into the portal using your username (or email address) and the password you created in the last step.

Use the username/email and password that you set up in the last step

Click here to reset your password, if you've forgotten it.

A screenshot of the Jach & Associates login page. The page has a dark blue header with the word "Login" and a question mark icon. Below the header is the Jach & Associates logo. The login form contains three input fields: "Accountant's Practice ID" with the value "JACH0001", "User Name/Email Address" (blurred), and "Password" (blurred). There is a "Remember me" checkbox which is checked. At the bottom of the form, there is a "Forgot Password" link and a blue "Login" button. Red arrows point from the text annotations to the "Accountant's Practice ID" field, the "Forgot Password" link, and the "Login" button.

Click here to login after you've entered your details

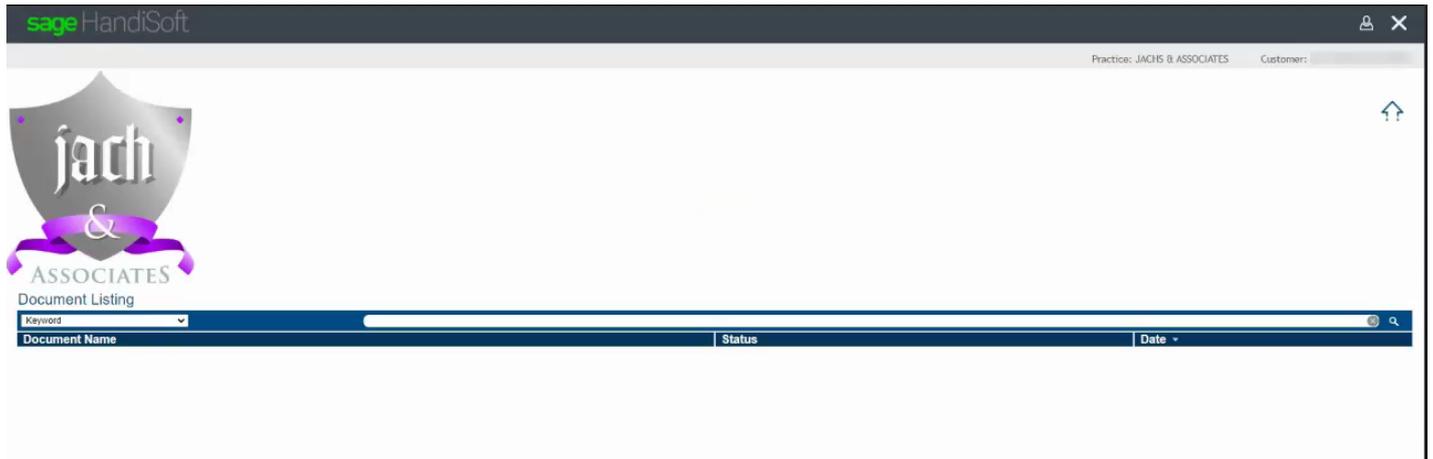


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Your Document Listing will now appear.





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