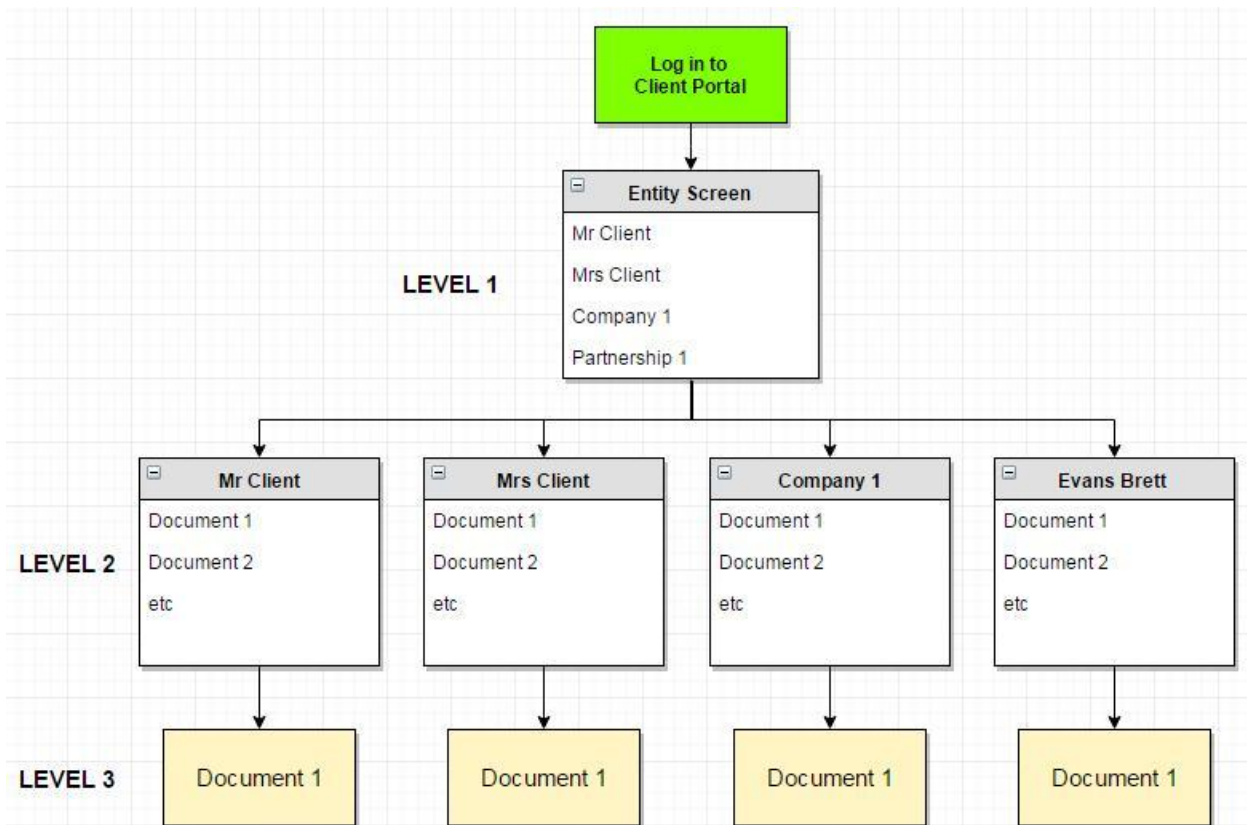


Coughlin Client Portal Instructions

The Client Portal is a multi-level structure.



To view & sign documents you click down into each entity see only the documents for that entity. To view other entities, you must move back up to Level 1 by pressing the X Cross button.

Level 1

After logging in you will see a list of your business & personal entities.

Client Reference	Client Name	Portal Area
REF0001	Mr Client 1	Portal login name
REF0001	Mrs Client 1	Portal login name
REF0001	Company 1	Portal login name
REF0001	Partnership 1	Portal login name

Level 2

Upon clicking on an entity you will see the documents for that entity.

The screenshot shows a 'Document List' window with a table of documents. Annotations in blue clouds explain the status icons and actions:

- Green means already signed. Red means signature required:** Points to the status icons in the first column of the table.
- Click Document to open the download screen:** Points to the document name 'test for signing.pdf'.
- Exit back to entity screen (Level 1):** Points to the close button (X) in the top right corner.
- Date last "activity" occurred on the document:** Points to the 'Date' column of the table.
- "Downloaded" status means you have already downloaded the document:** Points to the 'Status' column of the table.

Document Name	Status	Date
test for signing.pdf	Downloaded From Portal	02/11/2016
2016 NOA Cover Ltr -	Downloaded From Portal	02/11/2016
2016 ATO NOA -	Downloaded From Portal	02/11/2016
2016 Income Tax Return -	Downloaded From Document Manager	18/10/2016

Level 3

To download & view the document you click on the document name.

The screenshot shows the 'Document' detail view for 'test for signing.pdf'. Annotations in blue clouds explain the fields and actions:

- Click X to go back to Document list (Level 2):** Points to the close button (X) in the top right corner.
- Click to Download document to view it:** Points to the download icon at the bottom left.
- After downloading, you can e-sign the document (if required):** Points to the 'Signature Requested' field.
- History of document:** Points to the 'History' table.

Document Details:

- Name: test for signing.pdf
- Category Name: [Empty]
- Author: MATTHEW
- Current Status: Downloaded From Portal
- Status Date: 02/11/2016
- Date Uploaded: 02/11/2016
- Size: 2.61 KB
- Comment: [Empty]
- Signature Requested: Yes
- Downloaded: 02/11/2016
- Signed: [Empty]
- Locked: Document is unlocked and can be deleted

History Table:

Date	Status	User
02/11/16	Document Uploaded	MATTHEW
02/11/16	Signature Requested	MATTHEW
02/11/16	Downloaded From Portal	

To go back to another entity (Level 1), you must click the cross. If you are logged out it means you have clicked the cross at the entity screen (Level 1). You will need to log in again if this happens.