



# WOODGATE & ASSOCIATES

## ACCOUNTANTS & BUSINESS ADVISERS

**Northside:** Suite 1/Level 1, 468 Kingsford Smith Drive, Hamilton Qld 4007 **Postal:** PO Box 3228, Newstead Qld 4006  
(Entry and parking via Allen St off Racecourse Rd) **Southside:** PO Box 1064, Carindale Qld 4152  
**Telephone No.** (07) 3216 3900 **Fax No.** (07) 3216 3922 **Email:** [admin@twbs.com.au](mailto:admin@twbs.com.au)

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## Welcome to the Woodgate & Associates client portal.

Woodgate & Associates is excited to introduce the new client portal. This portal is an online management system which allows you to easily and safely send, receive and store all of your accounting and tax information online.

## What does this mean for you?

The client portal allows you to review and approve your accounting and tax information with the click of a button.

## Why are we doing this?

It's a safer and more efficient way to handle your accounting and tax. It simplifies the process for you and allows us to better serve your individual needs.

## What do you need to do?

Follow the process below to:

1. Sign up
2. Log in
3. Review/approve documents
4. Upload documents.



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## 1. SIGNING UP

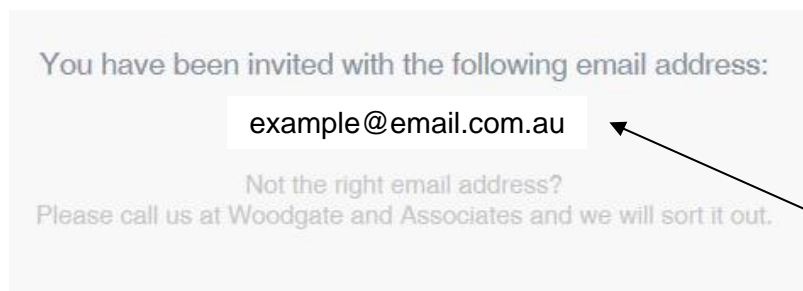
You will be sent an email inviting you to connect with the Woodgate & Associates client portal.

Once you have received this invitation, please follow the steps below.

### 1.1

Open the email and click on “Sign in to your portal”.

The email address used to invite you to the portal will already be included in this invitation.



*Note:*  
Your assigned email, which is your username to sign into the client portal, can be seen in the email here

*Click here in the email, and a sign in screen for the portal will open.*

**Sign in to your portal**

**Note:** If you would prefer to use a different email address to the one we have assigned, please contact us to set up your preferred email address.

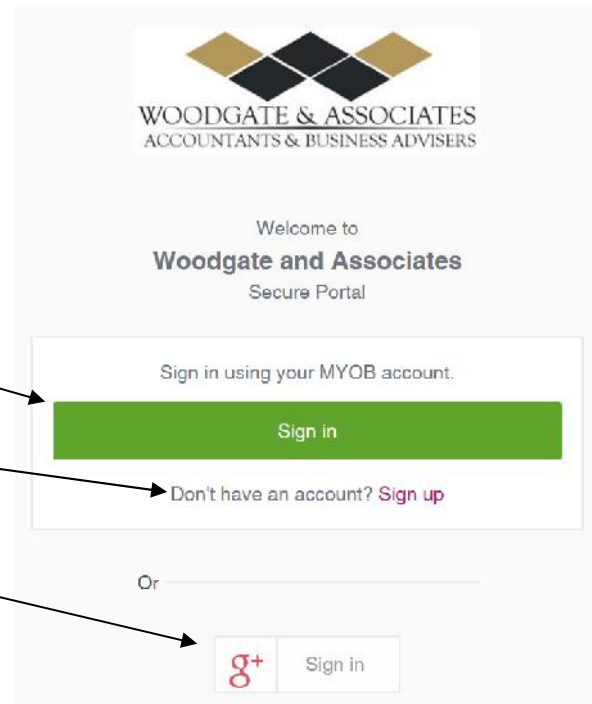


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### 1.2



When this sign in screen opens, you can:

- "Sign in" using your MYOB account
- "Sign up" using the email address we have assigned you

If the email address assigned to you is a 'Gmail' account:

- You can "sign in" down the bottom.

Using the MYOB login:

- You do not need to be a MYOB software user. MYOB is the software that Woodgate & Associates use for the client portal. If you already have a MYOB login, you can use those details to access the portal by clicking "Sign in". If you do not use MYOB, please click on the "Sign Up" button to create a login.

- A sign up screen, as seen below, will open up.

Enter the username (email address we have assigned you), then enter and confirm a new password, and click "Submit".

**myob**

*Example Sign Up Screen.  
This is where you can create a password  
for your assigned email address.*

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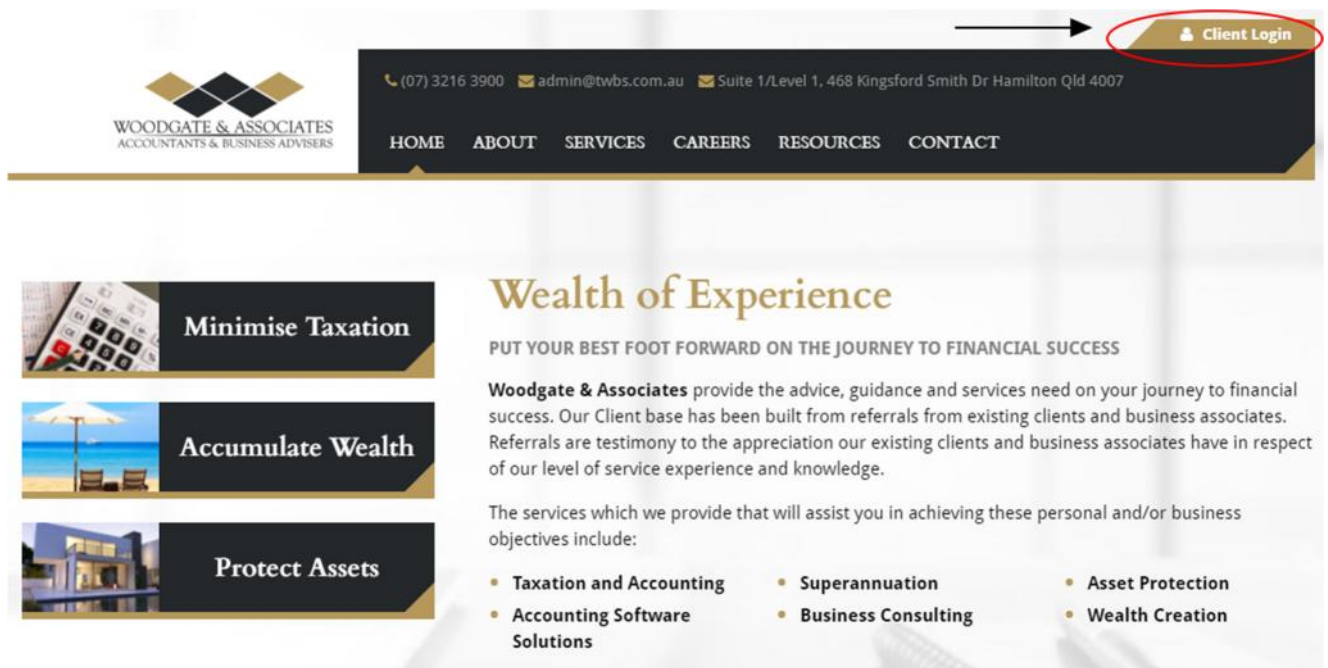
## 2. LOGGING IN

### 2.1

Once you have signed up, you can access the client portal at any time.

You can sign in using either of the following options:

- Go to our website: <http://twbs.com.au> and click Client Login in the top right



Or

- Follow this link: <https://woodgateandassociates.portal.accountants/>

(Tip: for ease, add this link to your 'favourites' in your internet browser)

### 2.2

Once you are signed in, you will be taken directly to the client portal which looks like this.



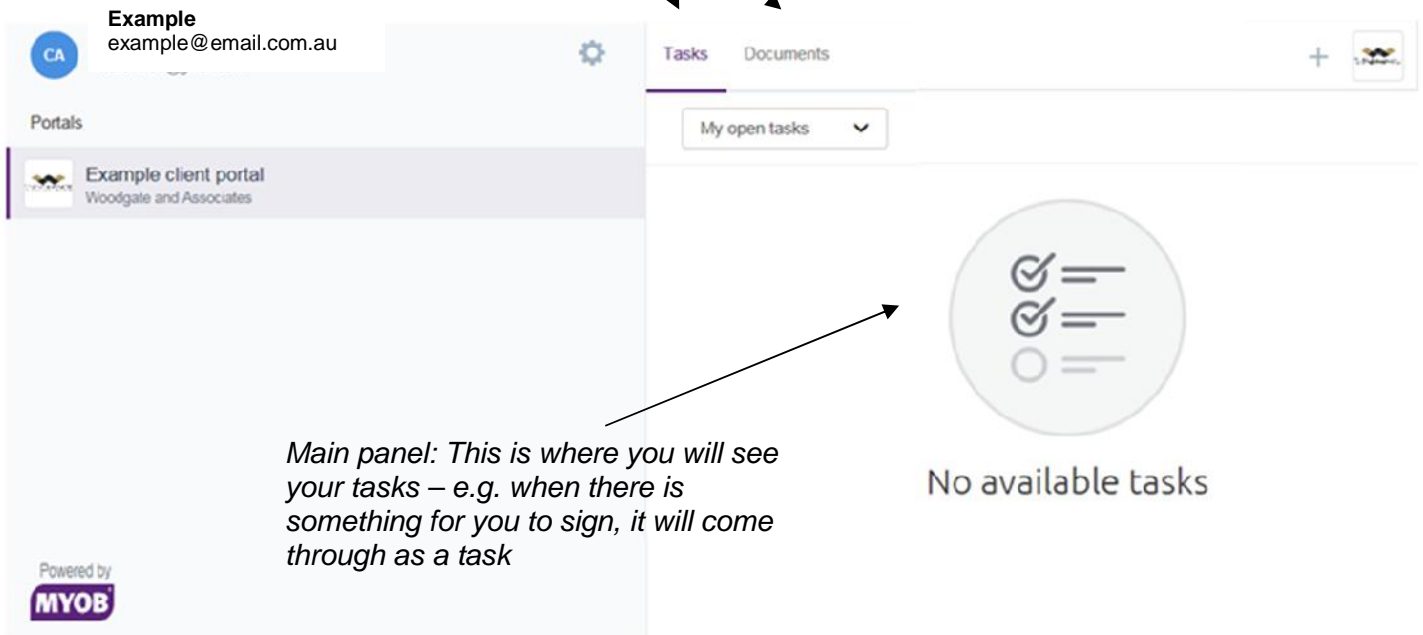
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- **Tasks tab:** where you will see things you need to do (e.g. documents you need to approve)
- **Documents tab:** where files are stored (e.g. previous year tax returns)

There are two tabs:



### 3. REVIEWING / APPROVING DOCUMENTS

#### 3.1

When a task is ready for you to action, you will receive an email from us.

#### 3.2

Click “View Task” in the email notification to go to the portal (you will be prompted to sign in).



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**Example** <mail@apps.myob.com>  
to me

**Please approve this document for lodgement.**

Due 20/12/2016

**Example** 09/12/2016  
Dear Example,  
Please find attached your Tax Document for your approval before lodgement.  
Thank you.  
This document requires your approval. Please view the task to digitally sign the document.  
Tax Document.pdf

**View Task**

### 3.3

The portal will open on the task page.

### 3.4

Open the document(s) waiting for you to review.

### 3.5



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Once reviewed, close the document and either click "Reject" or "Approve".

*Note: Documents MUST be opened to review prior to accepting or rejecting*

*Click here when you have reviewed the document and are ready to approve it*

### 3.6

When you click "Approve", a window will pop up asking you to confirm you are sure you want to approve this document.

Clicking the "Approve" button digitally signs the document.

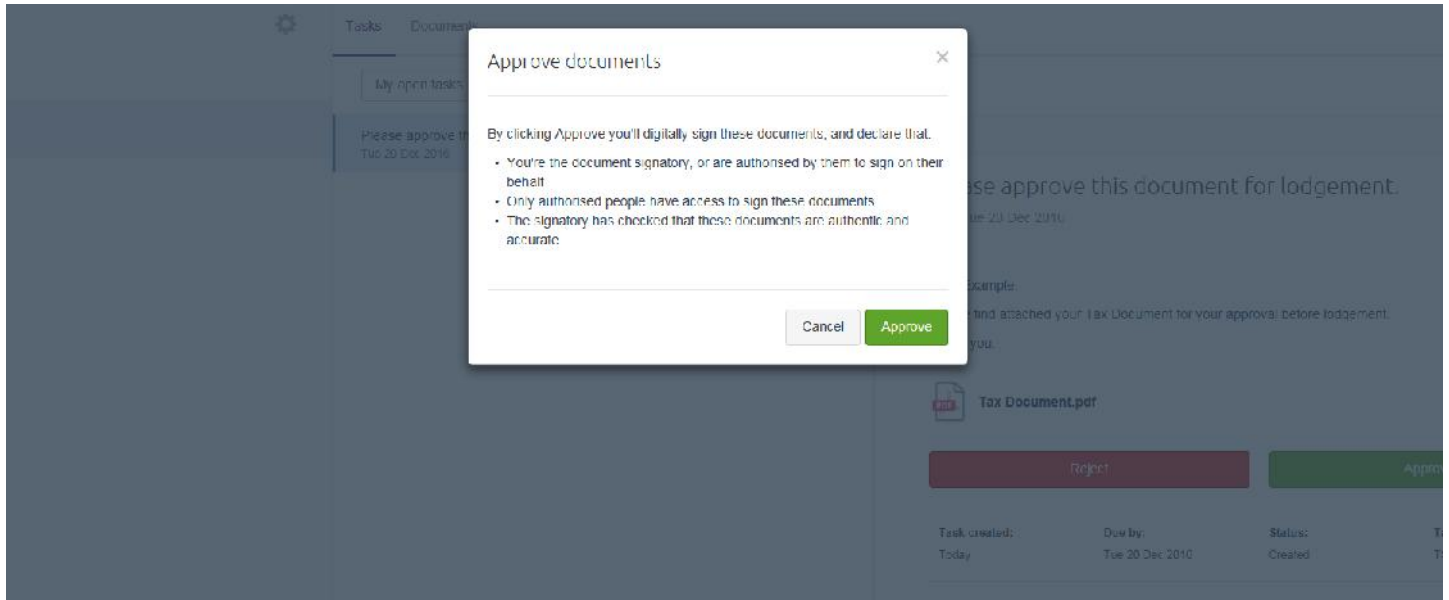
- Please note that is a **legally binding** signature.



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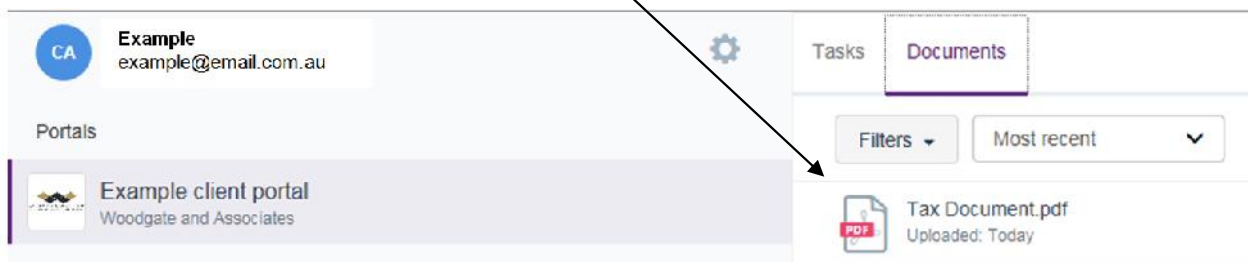
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### 3.7

Once the document is approved, the task is complete, and the signed documents (in PDF format) are automatically filed in your Documents tab.



## 4. UPLOADING DOCUMENTS

You can also upload and keep track of all your financial documents here. Things like bank statements, payment summaries or receipts can be added by simply clicking the plus (“+”) symbol in the top right of the screen.

*The plus symbol in the top right of the screen allows you to upload documents to be sent to Woodgate & Associates*

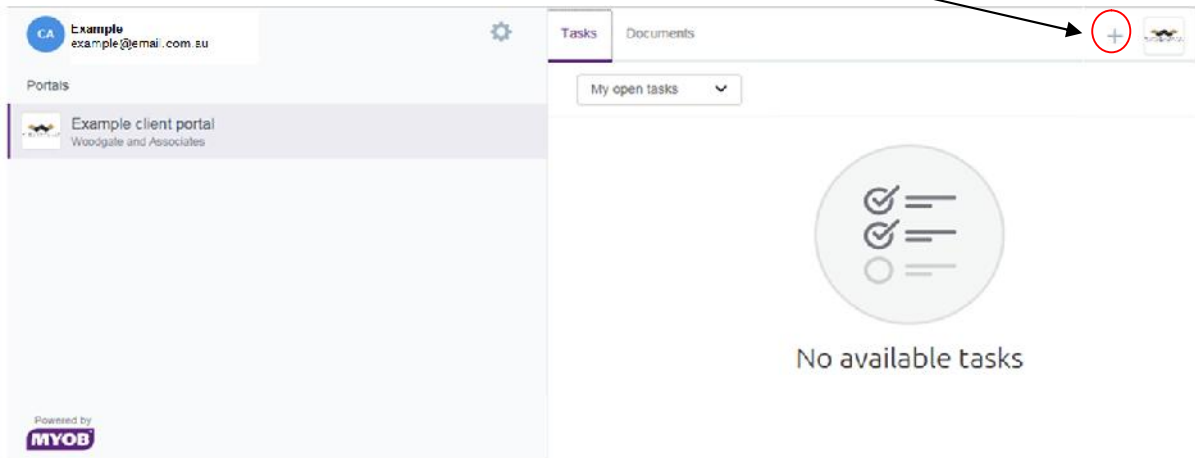




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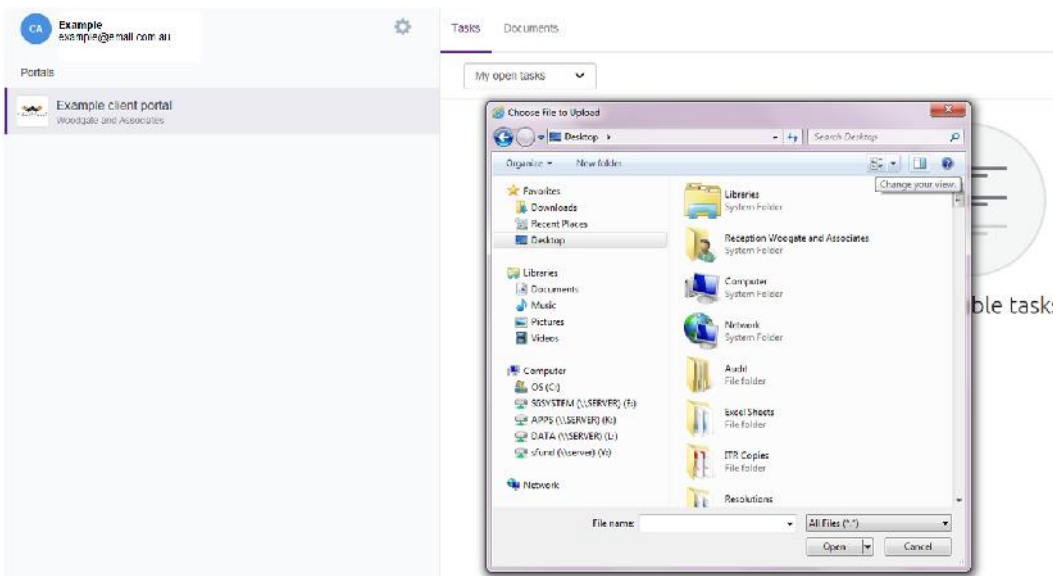


### 4.1

Click the plus symbol. An explorer window will open.

### 4.2

Browse to choose and upload the desired file (e.g. located on your computer)





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## Need more help?

Please feel free to contact us if you have any questions.