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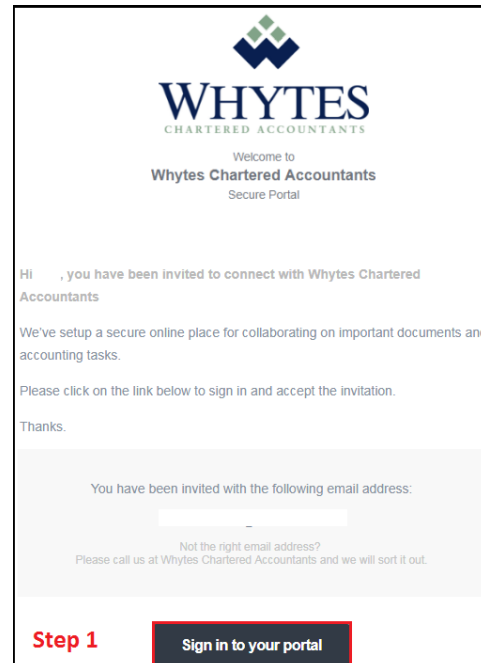
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Received an email invite to join the Whytes MYOB Portal?

You'll receive an email from Whytes inviting you to connect with Whytes in a secure online space, where you can collaborate with us on important documents and accounting tasks.

Once you receive an invitation email:

1. Click **Sign in to your portal** in the email. You'll then be directed to the Whytes MYOB portal web page where you'll be able to log in.



The screenshot shows an email invitation from Whytes Chartered Accountants. It includes the company logo, a welcome message, and instructions to click a link to sign in. A red box highlights the 'Sign in to your portal' button at the bottom right.

Step 1 Sign in to your portal

2. You can then select your login method using one of these options:

a. Login using your existing MYOB account

This option is only available for existing MYOB software users i.e. MYOB AccountRight or MYOB Essential

i. Click "Sign in" from the question "Already have an account?"



The screenshot shows the Whytes MYOB portal login page. It includes the company logo, a welcome message, and a 'Sign up' button. A red box highlights the 'Already have an account? Sign in' link at the bottom right.

Step 2 Already have an account? Sign in

ii. Enter your MYOB account email address and secure password



The screenshot shows the MYOB sign-in page. It includes the MYOB logo, a 'Sign in to MYOB' heading, and input fields for email and password. A red box highlights the 'Sign in' button at the bottom right.

Step 3 Sign in

b. Setup a new login using your email address and secure password

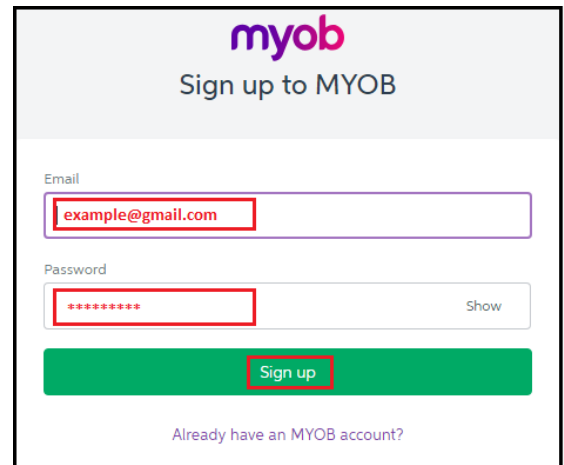
i. Click Sign Up button



The screenshot shows the 'Whytes Chartered Accountants Secure Portal' sign-up page. At the top is the company logo and name. Below it, a welcome message reads 'Welcome to Whytes Chartered Accountants Secure Portal'. A text prompt says 'Use your example@gmail.com email when you sign up or sign in to this portal.' A green button with the text 'Sign up' is highlighted with a red rectangle. At the bottom, a link says 'Already have an account? Sign in'.

ii. Enter your email address and password

iii. Click "Sign up"



The screenshot shows the 'myob Sign up to MYOB' form. It has a header with the 'myob' logo and the text 'Sign up to MYOB'. Below are two input fields: 'Email' with 'example@gmail.com' and 'Password' with '*****'. A 'Show' link is next to the password field. A green button with 'Sign up' is highlighted with a red rectangle. At the bottom, a link says 'Already have an MYOB account?'.

iv. You will be directed to the Whytes MYOB portal log in

v. Click "Sign in" and enter the MYOB account you just created.

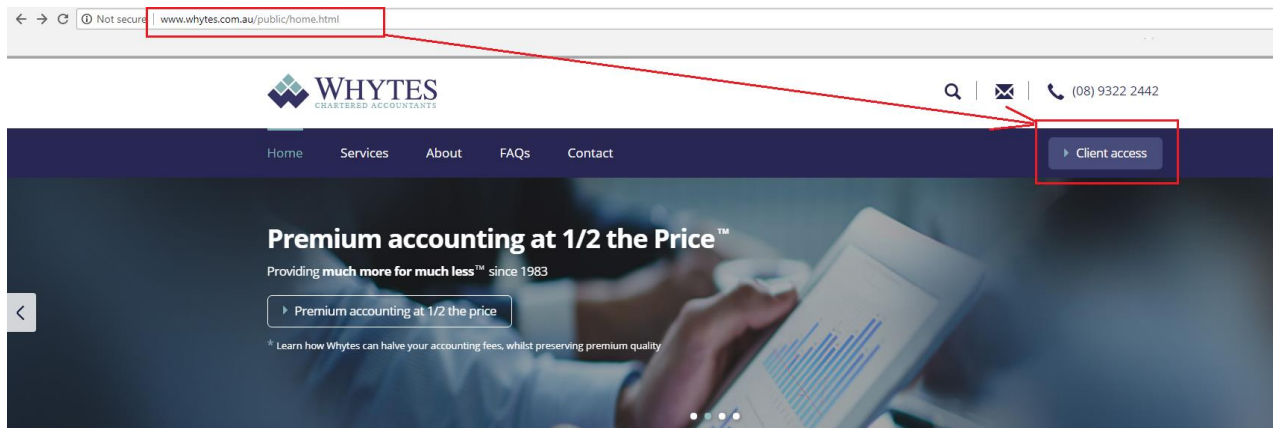


The screenshot shows the 'Whytes Chartered Accountants Secure Portal' sign-in page. It features the company logo and a welcome message. A text prompt says 'Sign in using your MYOB account.' A green button with the text 'Sign in' is highlighted with a red rectangle. At the bottom, a link says 'Don't have an account? Sign up'.

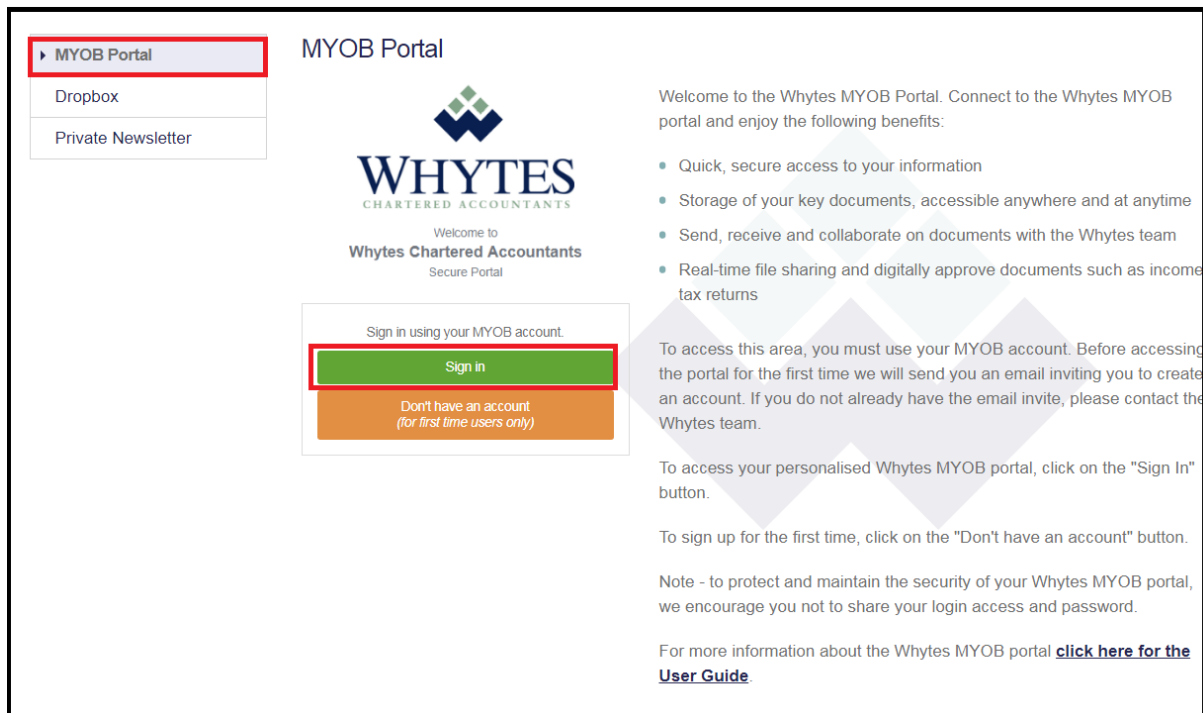
How do I log in to my Whytes MYOB portal?

You can access your Whytes MYOB portal from the Whytes website

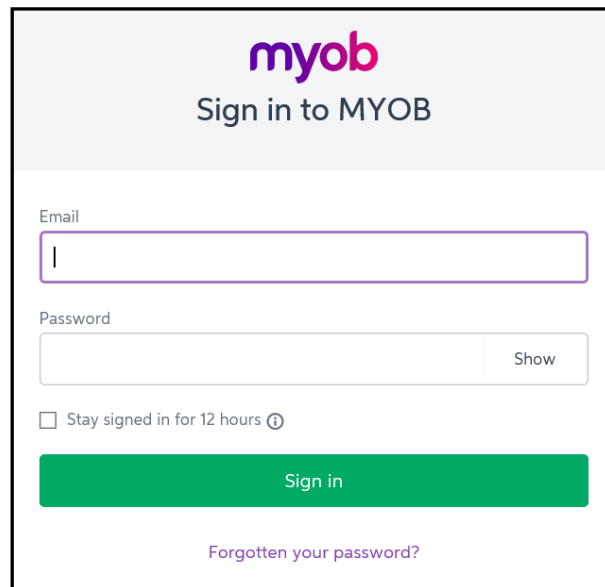
1. Go to Whytes' website at www.whytes.com.au
2. Select Client Access



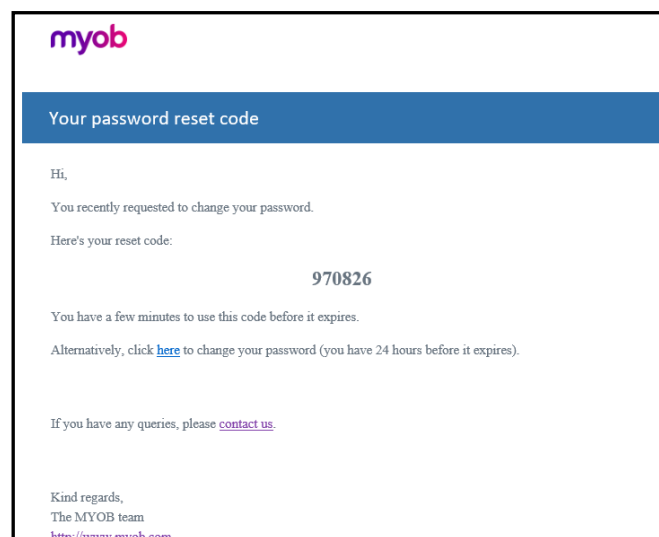
3. Select "Sign in"
4. Sign in using your MYOB account



4. If you have forgotten your password or need to change it, simply click on "Forgotten your password?" and you will receive an email with simple instructions on how to reset your password.



The screenshot shows the MYOB Sign in page. At the top, the MYOB logo is displayed in purple, followed by the text "Sign in to MYOB". Below this, there are two input fields: "Email" and "Password". The "Email" field contains a single character "I". The "Password" field is empty and has a "Show" button to its right. Below the password field is a checkbox labeled "Stay signed in for 12 hours" with an information icon. A large green "Sign in" button is positioned below the checkbox. At the bottom of the form, there is a link that says "Forgotten your password?" in purple text.



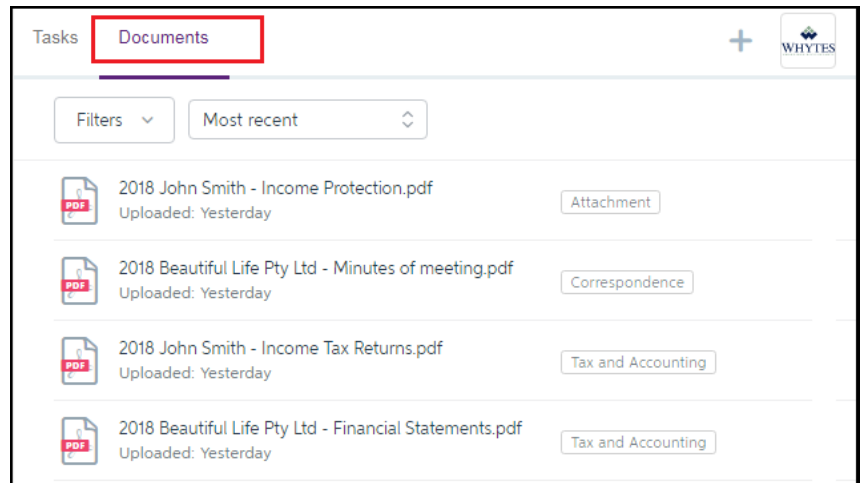
The screenshot shows an email from MYOB regarding a password reset. The email header has the MYOB logo and the subject "Your password reset code". The body of the email starts with "Hi," followed by "You recently requested to change your password." and "Here's your reset code:". The reset code is displayed as "970826". Below the code, it says "You have a few minutes to use this code before it expires." and "Alternatively, click [here](#) to change your password (you have 24 hours before it expires)." At the bottom, it says "If you have any queries, please [contact us](#)." and "Kind regards, The MYOB team" with the URL <http://www.myob.com>.

What can I do in the Whytes MYOB portal?

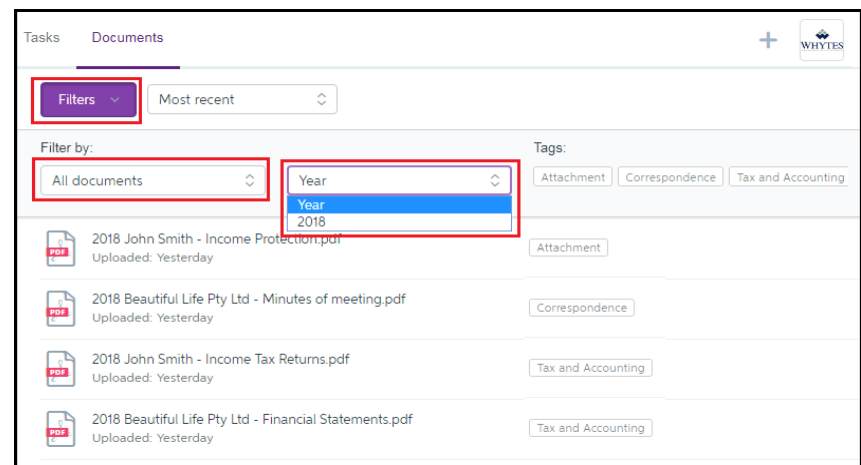
In your collaborative Whytes MYOB portal, you can:

View a document

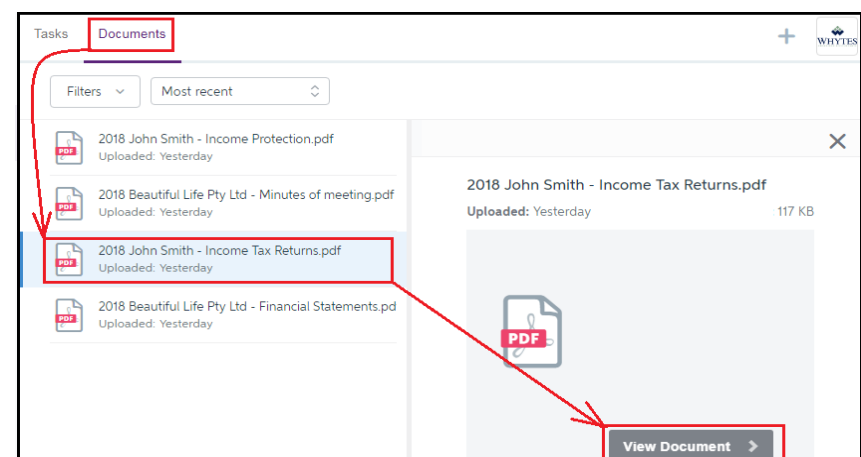
1. Click the **Documents** tab.
A list of all the documents that your advisor has made available to you is displayed.
Anyone who has full access to your portal will be able to view all of the listed documents.



2. Filter your documents to find the one you're looking for.

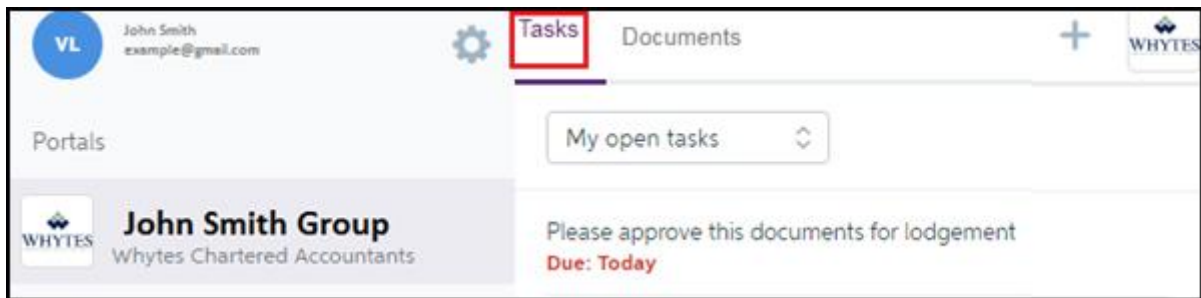


3. Select the name of your document to open and view it.

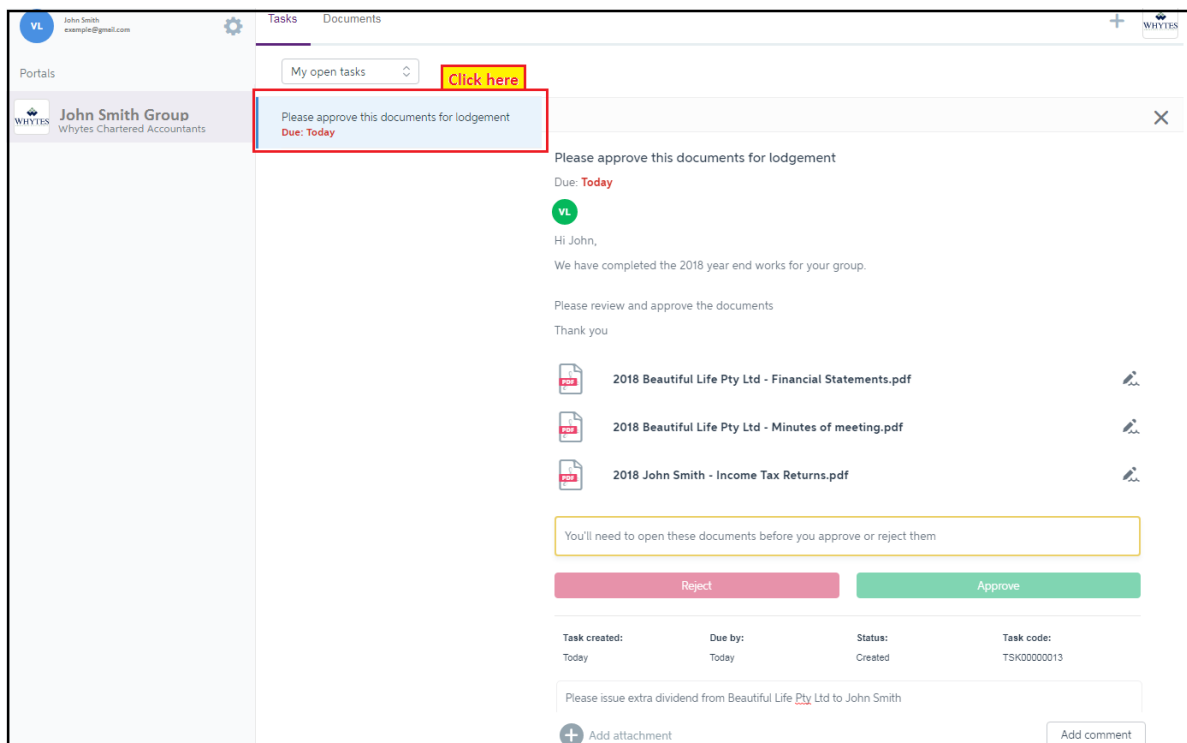


Approve a document

1. Click the task on the **Tasks** tab to display all its details.



2. Click the task on the **Tasks** tab to display all its details



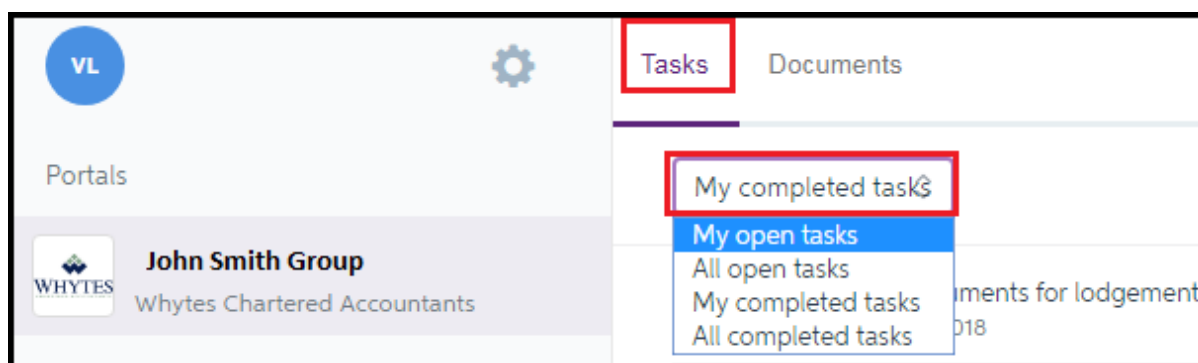
3. You will need to open each document to review before you approve or reject them. Depending on your review of the documents, either click:



View my task

Any items that require an action from you will be listed on the **Tasks** page. Tasks are normally listed in date order, with the most recent one at the top. Your tasks can either be ones that require the approval of documents (such as your annual tax return) or ones that are general activities that Whytes needs you to do (such as send us your monthly receipts).

On your **Tasks** page, you'll see at a glance a list of tasks (which can be filtered), as well as each task's due date and other portal users who have also been assigned the task.



1. All open tasks

- a. All the open tasks associated with this portal are displayed.
- b. If you have restricted access to the portal, you'll only be able to view **My open tasks**.


2. My Completed Tasks

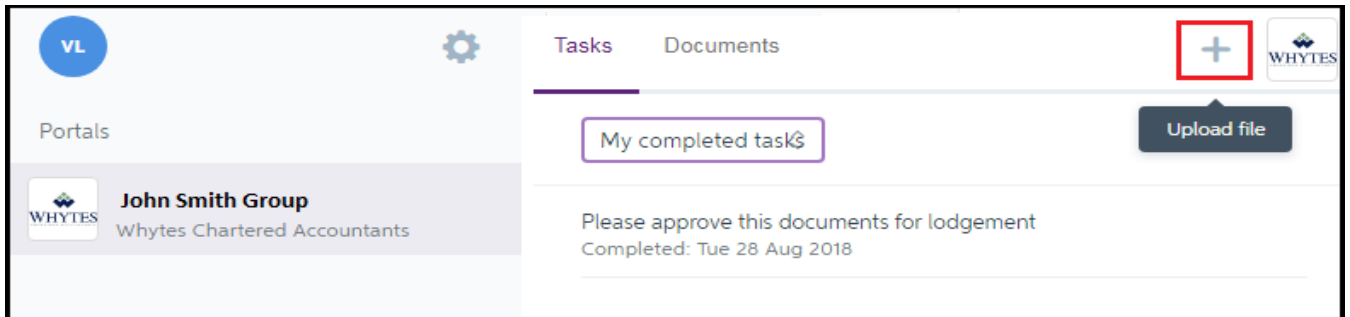
- a. All your completed tasks are displayed.

3. All Completed Tasks

- a. All the completed tasks associated with this portal are displayed.
- b. If you have restricted access to the portal, you'll only be able to view **My completed tasks**.

Upload a file – PDF, Word, Excel

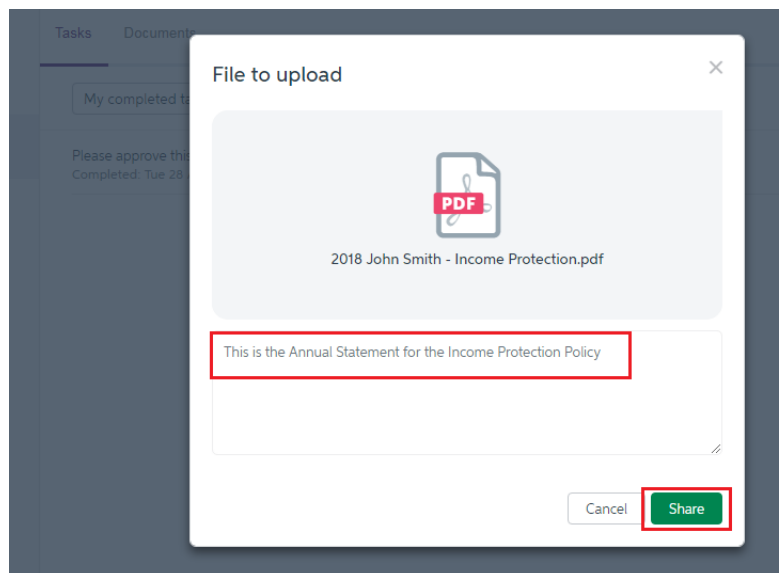
1. Click  (in the top right-hand corner) to find and select a file from your desktop or mobile device.



2. At the File to upload dialog, enter a description for your selected file. This will be the body of the email that's sent to Whytes. Be informative here, so we know exactly what we need to do with it.

3. Click **Share**.

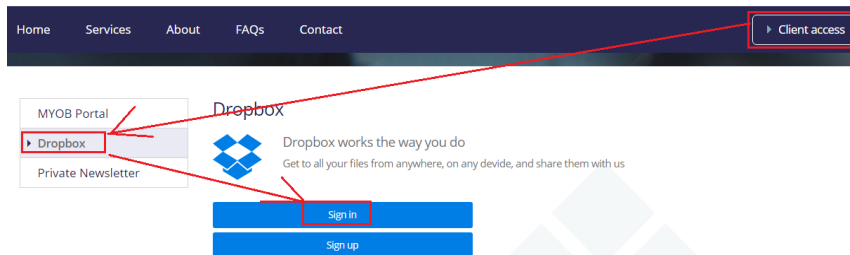
An email will be sent to Whytes and the document will be displayed in your **Documents** tab with an Upload tag.



Upload a file – MYOB, Xero, Quickbook data file:

1. Please upload all your data files such as quickbooks, reckon, myob etc using your personal dropbox account.

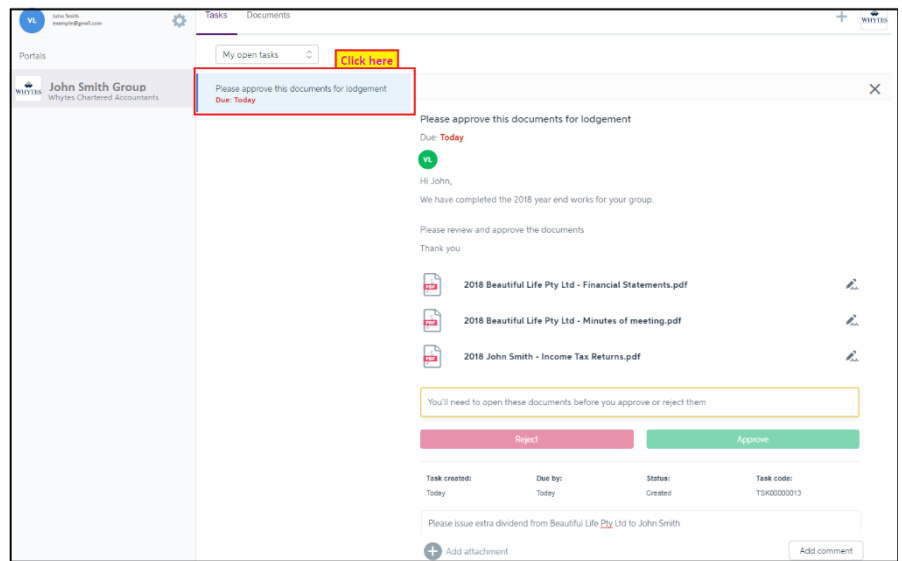
You can login to your dropbox account via our website



If you don't have an account with dropbox – you can setup a free dropbox account with dropbox by following the instructions provided by dropbox

Leaving comments about a task

1. Click the task in the **Tasks** list to view its details.

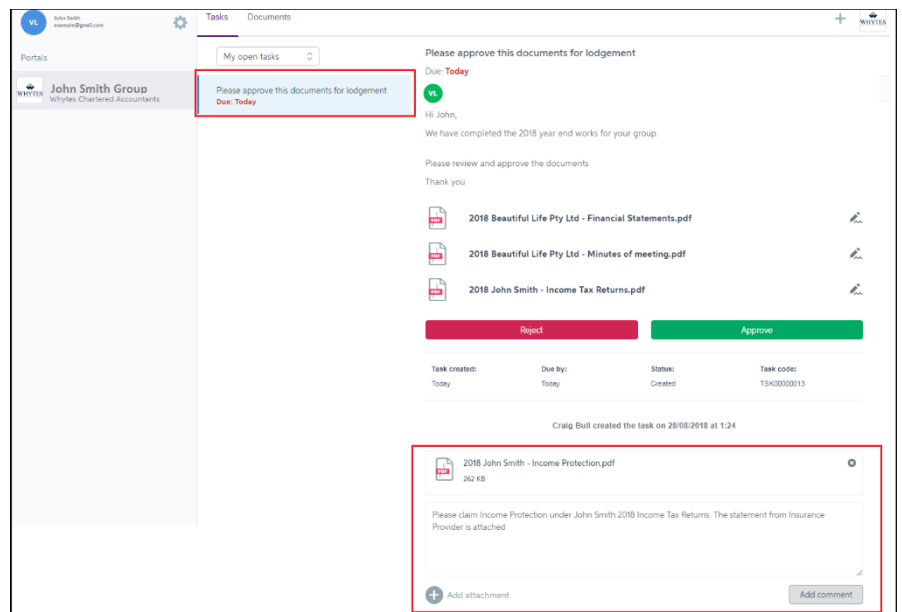


2. Scroll to the **Comment** text box and enter your comment.

3. Click **Add attachment** to find and select any supporting documents

4. If you attach the wrong document, just click the associated **X** to remove it, then find and attach the correct one.

5. When you're done, click Send.



How do I know what needs to be done?

You will always receive an email from Whytes when activities occur in your Whytes MYOB portal. For instance, you will receive an email when:

- Whytes are sharing documents with you to view and/or file
- Digital approval of documents is required. In this case, a task will be created by Whytes and assigned to you to action
- Whytes create a general task for you to action related to your business

When Whytes upload a document to view and/or file

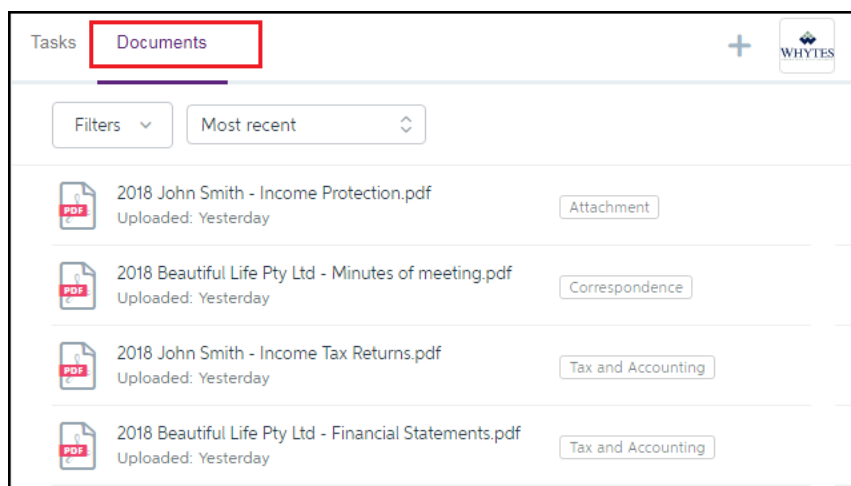
1. You will receive an email from Whytes advising you that a document has been uploaded

2. Click "View Task" at the bottom of Whytes' email to Sign in to your portal

3. Enter your email address and password

4. Select the Documents tab. Documents uploaded by Whytes for your records will be listed

5. Click on the document you wish to view




When you received an email from Whytes that requires your action such as approve (digitally sign) a tax return

You will receive an email from Whytes advising that you need to sign a document.

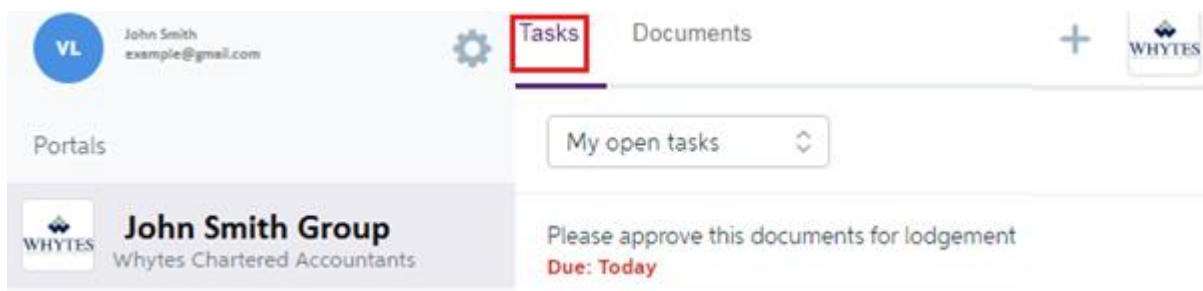
1. Click "View Task" at the bottom of Whytes' email to Sign in to your portal



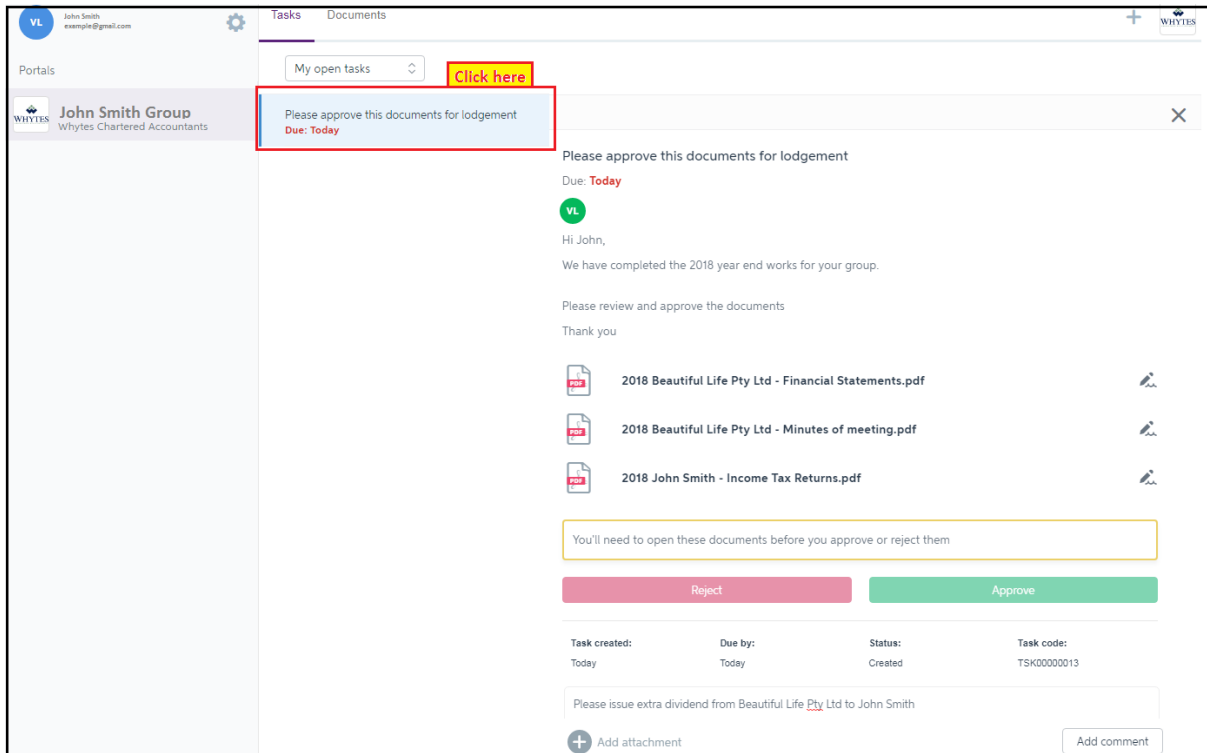
2. Enter your email address and password to Log in to your portal



3. Select the Tasks tab

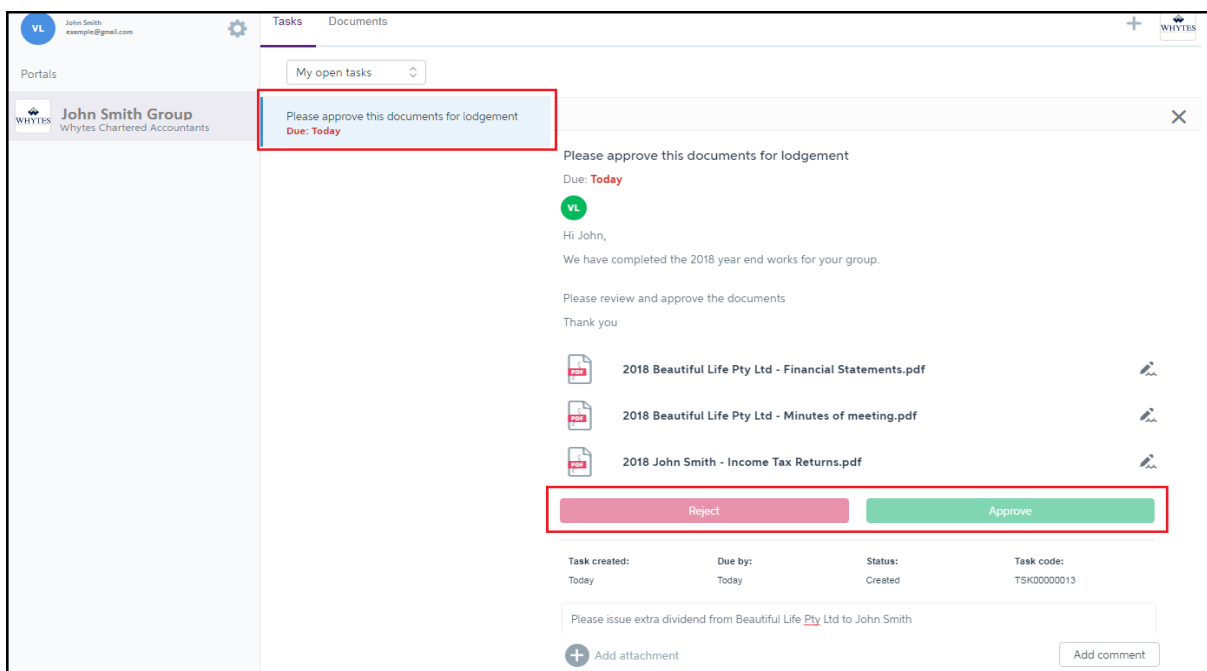


4. To review / approve documents, click on the allocated task, a new panel will display with different options for you to choose from.



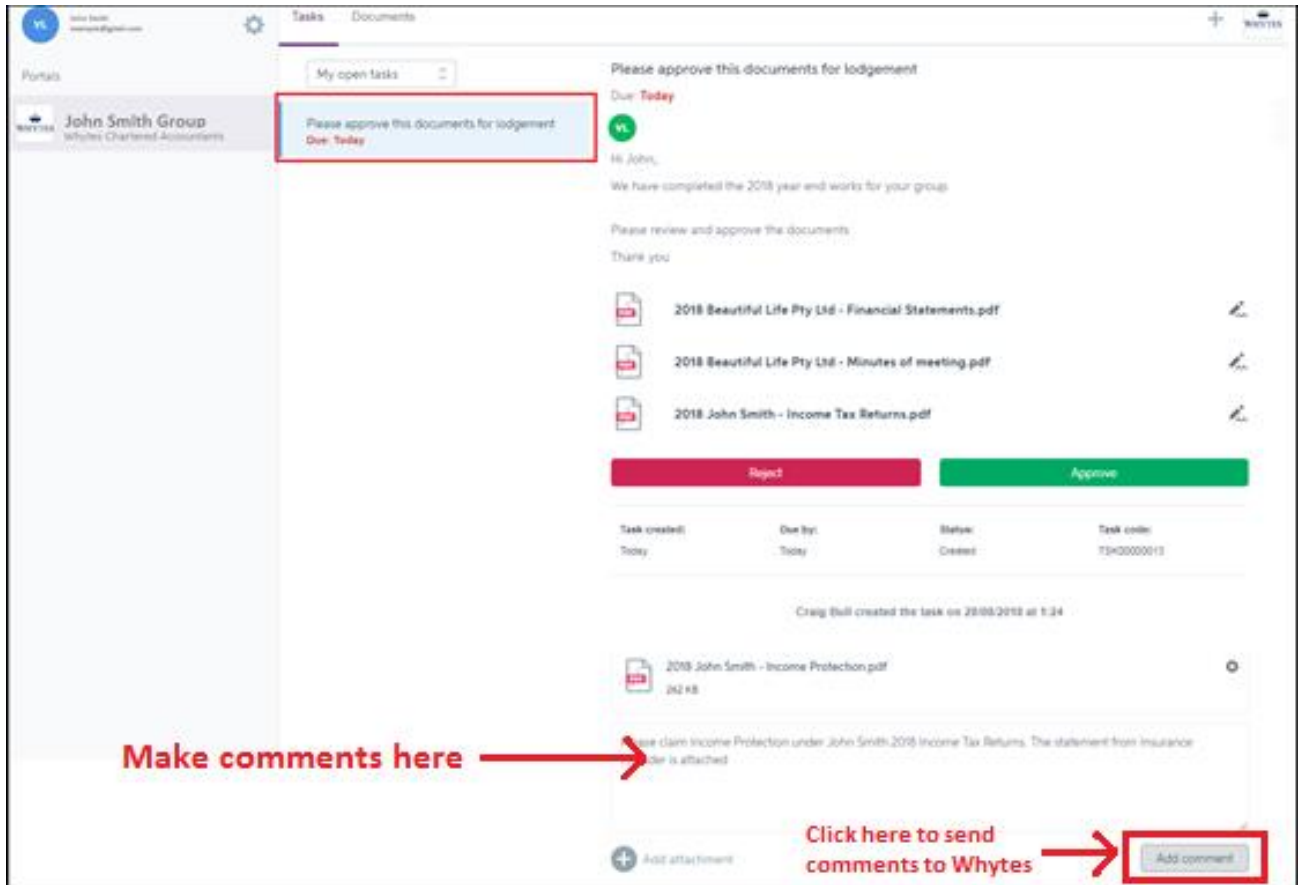
The screenshot shows the Whytes portal interface. On the left, there's a sidebar with the user's name 'John Smith' and email 'example@gmail.com'. The main area is titled 'Tasks' and 'Documents'. A task notification is displayed: 'Please approve this documents for lodgement Due: Today'. A red box highlights this notification, and a yellow box highlights the 'Click here' link. The task details panel shows the task title 'Please approve this documents for lodgement', the due date 'Due: Today', and a list of documents to be reviewed: '2018 Beautiful Life Pty Ltd - Financial Statements.pdf', '2018 Beautiful Life Pty Ltd - Minutes of meeting.pdf', and '2018 John Smith - Income Tax Returns.pdf'. Below the list, there's a yellow box stating 'You'll need to open these documents before you approve or reject them'. At the bottom, there are 'Reject' and 'Approve' buttons, and a task code 'TSK00000013'.

5. You will need to open each document to review before you approve or reject them. Once approved, the approval confirmation will be emailed to Whytes.



This screenshot is identical to the previous one, showing the task notification and document list. However, a red box highlights the 'Reject' and 'Approve' buttons at the bottom of the task details panel, indicating the next step in the process.

6. In addition, if you want to add any comments, you can do so under the "comment box" then click on "Add Comment" and the comment will be sent to Whytes



Portals

John Smith Group
Whytes Chartered Accountants

My open tasks

Please approve this documents for lodgement
Due: Today

Please approve this documents for lodgement
Due: Today

Please approve this documents for lodgement
Due: Today

Hi John,

We have completed the 2018 year end works for your group.

Please review and approve the documents.

Thank you

2018 Beautiful Life Pty Ltd - Financial Statements.pdf

2018 Beautiful Life Pty Ltd - Minutes of meeting.pdf

2018 John Smith - Income Tax Returns.pdf

Reject Approve

| Task created: | Due by: | Status: | Task code: |
|---------------|---------|---------|------------|
| Today | Today | Created | TSH0000013 |

Craig Bull created the task on 28/08/2018 at 1:34

2018 John Smith - Income Protection.pdf
262 KB

Please claim Income Protection under John Smith 2018 Income Tax Returns. The statement from Insurance Co is attached

Make comments here

Click here to send comments to Whytes

Add attachment

Add comment