

- 1) Click on the invitation link
- 2) Signup for a MYOB Portal.
  - Your username will be the email address that you received the invitation on. You need to setup a password for yourself for the first time only. Your password should include special characters.
  - If you have used our MYOB portal before, you can use the same login.
  - If you have forgotten your password, click on forgot password, enter your email address, you will receive a code in your email and setup new password. If you still cannot access it, please let us know and we will resend you the invitation link.
- 3) Once you logged in, please follow the following steps:
  - in the Tasks tab you will see all tasks that you need to action on.
  - Click on each document enclosed to view them.
  - Review all the documents properly.
  - Approve each document individually. You will be asked to final approve all the documents the second time.
  - Once you approve the document the second time, the documents will be electronically emailed to us with your authorisation.
  - If you disagree with the document or have further queries, please do not approve. Click Reject and put your comments for the rejection. We will review your comments and respond accordingly.
- 4) Once the document is approved, it will be permanently filed under Documents Tab. So, if you need any of this information it will be at your fingertips 24/7 from any devices.
- 5) You can message us anytime or send any documents to us using your login. You can also share a page by camera/ scan copy, and it will direct to us in My Portal.

**Note:**

- 1) You can always login to your MYOB Portal account from any device using this link <https://platinumaccountants.portal.accountants/login>
- 2) You can access all your financials, income tax returns and other tax related documents from any device. In future if you need any of these documents for third party for example bank, or mortgage brokers, you can always download them from here rather than requesting it from us.
- 3) You do not have to print the documents, sign and scan it back to us.
- 4) This is very secure as you need to have your own password every time you login.
- 5) The documents are securely stored on MYOB server.