

Signing up for the Client Portal

You will receive an email from us inviting you to sign up for your client portal, so that you can collaborate on important documents and accounting tasks.

Once you receive the email, simply click the **Sign in to your portal** button in the email to accept the invitation.

Hi [redacted] you have been invited to connect with Pinnacle Accounting & Business Services

We've setup a secure online place for collaborating on important documents and accounting tasks.

Please click on the link below to sign in and accept the invitation.

Thanks.

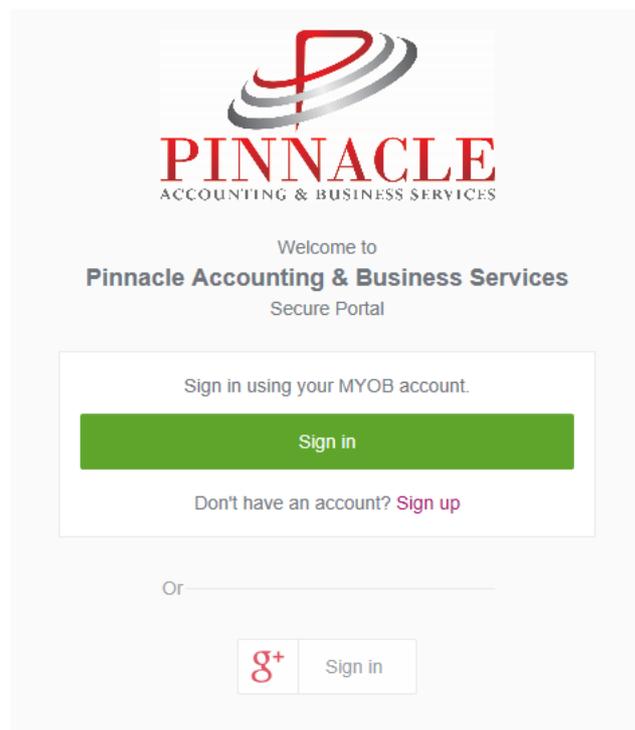
You have been invited with the following email address:

[redacted]

Not the right email address?
Please call us at Pinnacle Accounting & Business Services and we will sort it out.

[Sign in to your portal](#)

You will be directed to a web page where you will be able to log in to the portal. An example login screen is shown below:



The screenshot shows the login page for the Pinnacle Accounting & Business Services Secure Portal. At the top is the Pinnacle logo, which consists of a stylized 'P' with a red and grey swirl. Below the logo, the text reads 'PINNACLE ACCOUNTING & BUSINESS SERVICES'. Underneath that, it says 'Welcome to Pinnacle Accounting & Business Services Secure Portal'. The main content area is a white box with a green border. Inside this box, it says 'Sign in using your MYOB account.' followed by a large green 'Sign in' button. Below the button, it says 'Don't have an account? Sign up' with 'Sign up' in purple. Below the white box, it says 'Or' followed by a horizontal line. At the bottom, there is a Google+ sign-in button with the 'g+' logo and the text 'Sign in'.

We suggest that you favourite this webpage <https://pinnacleaccounting.portal.accountants> so that you can easily access it in the future.

You can now choose to log into your portal using your existing MYOB account login by clicking the Sign In button and using your existing credentials.

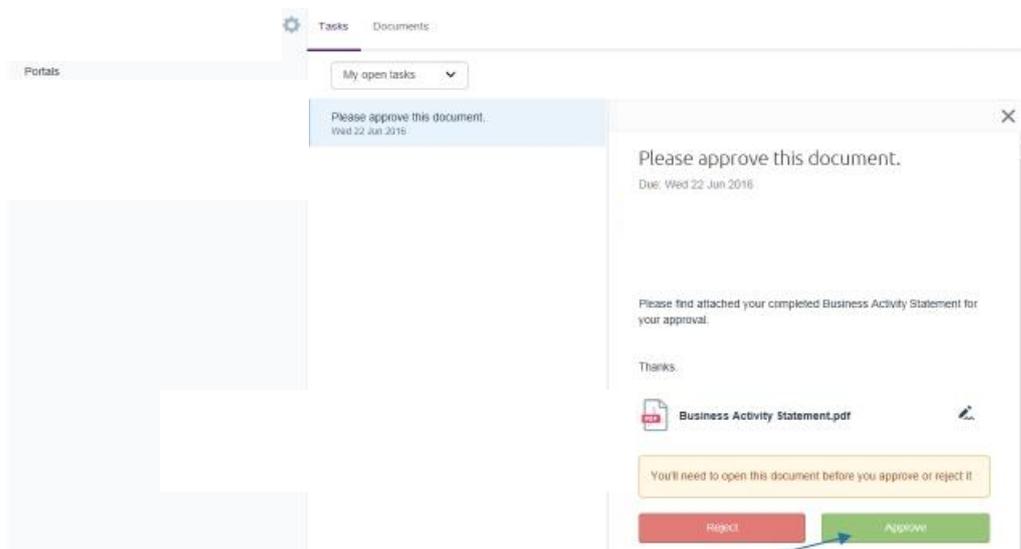
Or, in most cases you will not have a MYOB login and will need to create one to use the portal. Click Sign up and enter your username (email address) and password, confirm your password and then press **Submit**.

Once signed up you will be directed to your client portal. The **Tasks** page opens enabling you to view any tasks that we have created for you.

We may have only just set up your client portal and may not have created any tasks for you yet, so the **Tasks** page may be blank.

Reviewing & Approving Documents

- When a task is ready for you to action, you will receive an email from us.
- Click “View Task” in the email notification to go to the portal (you will be prompted to sign in). The portal will open on the task page.
- Open the document(s) waiting for you to review. (Please note you must open the documents before you can approve or reject them)
- Once reviewed, close the document and you can now digitally sign the document by clicking the “Approve” button.



- An **Approve Document** message box is displayed informing you that approving the document means that the document will be digitally signed and returned to us. The digital signature is legally binding, so it is important that you carefully read the document.

- Alternatively, if there are changes or something stopping you from approving the document, you can also click on the “Reject” button and advise us of why the document is being rejected in the comments section.
- Our office will be notified by email when you approve or reject a document associated with a task.
- Once we receive notification to advise that a document has been approved and that same document requires lodgement to the ATO, we can lodge the document as soon as payment of our invoice/s have been made. If documents require alterations, we will resend the amended documents for your approval.
- Once the document/s within the task have been approved by you, the documents will remain in your Documents tab for future reference and can be downloaded at any time when required.

Uploading Documents to Pinnacle Accounting Using the Client Portal

You can also upload and keep track of all your financial documents in the portal. Things like payslips, bank statements or receipts can be uploaded to your portal and our office will receive a notification to download those documents.

To Upload Single Documents

- Click **Documents** tab.
- Click **+ Upload**. (The **Upload** button is located in the top right-hand corner below the banner.)
- The **Choose File to Upload** window displays. Browse and select the file that you wish to upload.
- Enter a **Description**. This will form the body of the email to Pinnacle Accounting.
- Click **Share**.

An email will be sent to our office with the document attached to your client portal.

To Upload Multiple Documents - The portal only allows you to choose one file to upload at a time. To be able to upload multiple documents at once, you will need to create a zip folder.

- To create a zip folder using Windows, save all the documents you would like to send to our office into one folder named "Accountant Documents" or something similar.
- Once created, right click on this folder.
- Select "Send To."
- Select "Compressed (zipped) folder." The result will be a zip file with folder icon with a zipper on it.
- This folder with the zip on it will be the file you choose below.
- Return to the client portal, Click **Documents** tab.
- Click **+ Upload**. (The **Upload** button is located in the top right-hand corner below the banner.)
- The **Choose File to Upload** window displays. Browse and select the zipped file that you wish to upload.
- Enter a **Description**. This will form the body of the email to Pinnacle Accounting.
- Click **Share**.

An email will be sent to our office with the zip file attached to your client portal. Please be aware that the 18MB limit applies to all files so if the zip file exceeds 18MB in size you may need to split the documents over multiple zip files.

[Need more help?](#)

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

MYOB have also created an online resource.

<http://adhelp.myob.com/ONLINE/SME/index.htm>