# Index





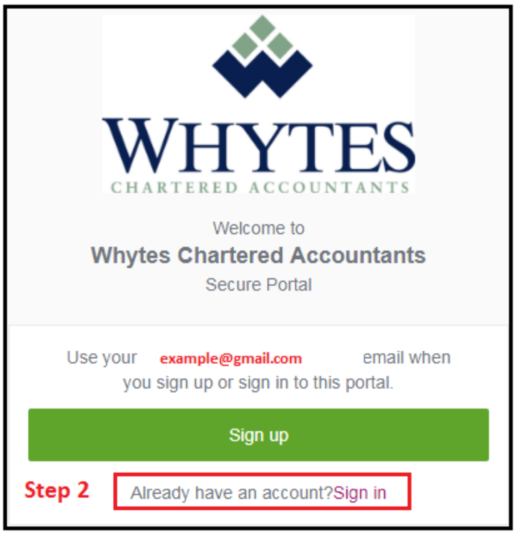
 

# Received an email invite to join the Whytes MYOB Portal?


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.

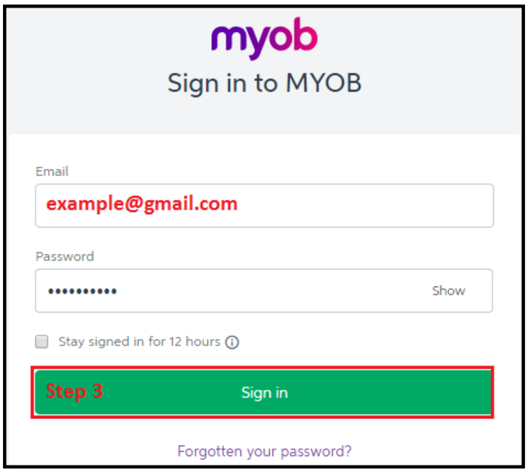



2. You can then select your login method using one of these options:

***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?"




ii. Enter your MYOB account email address and secure password





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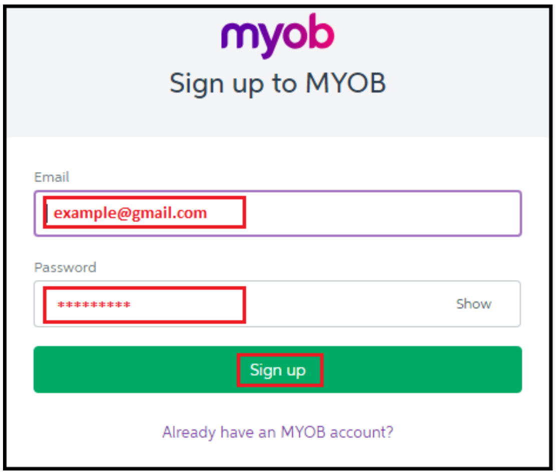
## *b. Setup a new login using your email address and secure password*

i. Click Sign Up button


ii. Enter your email address and password

iii. Click "Sign up"




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

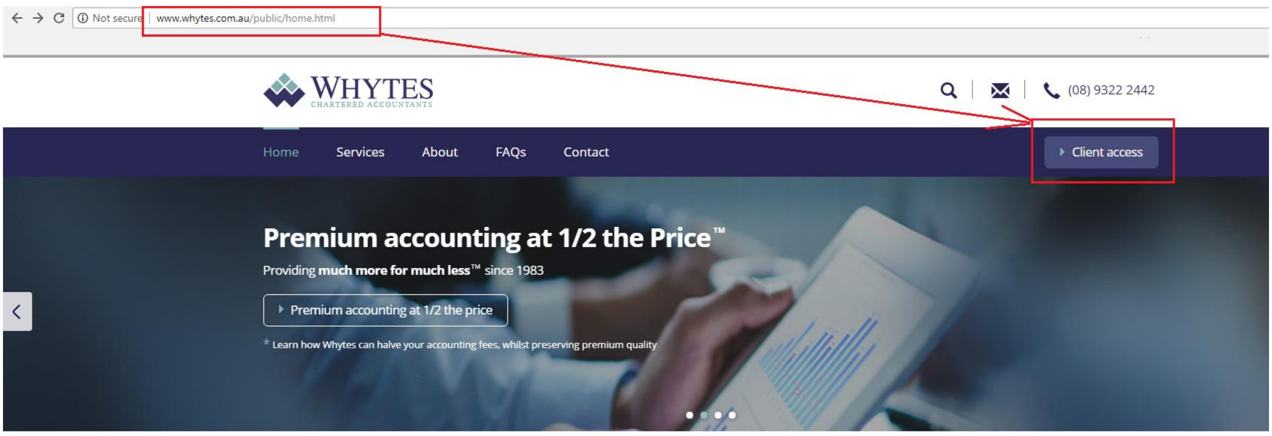
v. Click "Sign in" and enter the MYOB account you just created.

# How do I log in to my Whytes MYOB portal?

You can access your Whytes MYOB portal from the Whytes website

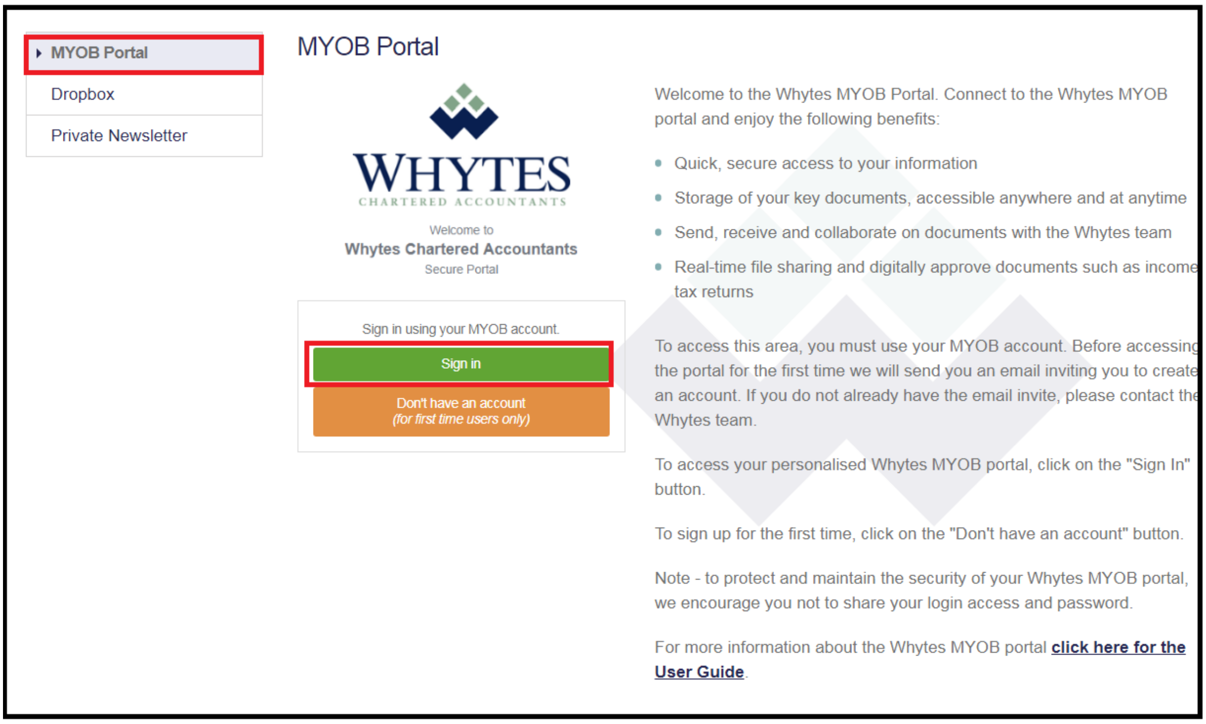
1. Go to Whytes' website at [www.whytes.com.au](http://www.whytes.com.au)

2. Select Client Access




3. Select "Sign in"

4. Sign in using your MYOB account



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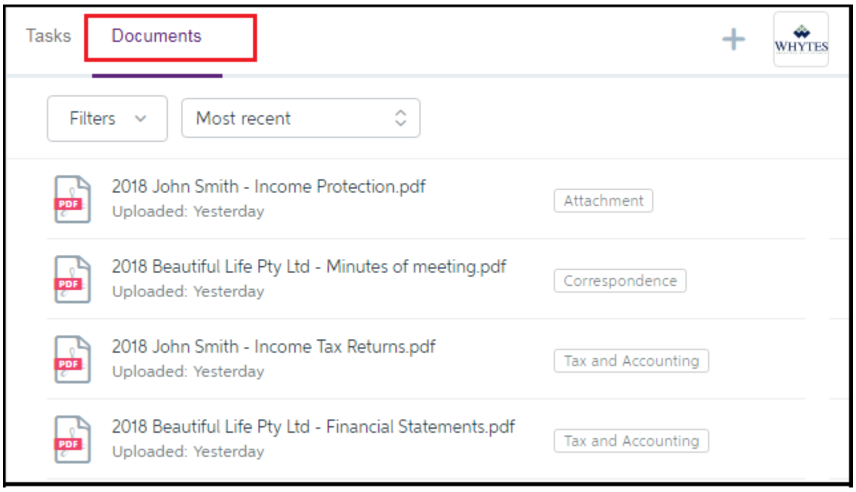
# What can I do in the Whytes MYOB portal?

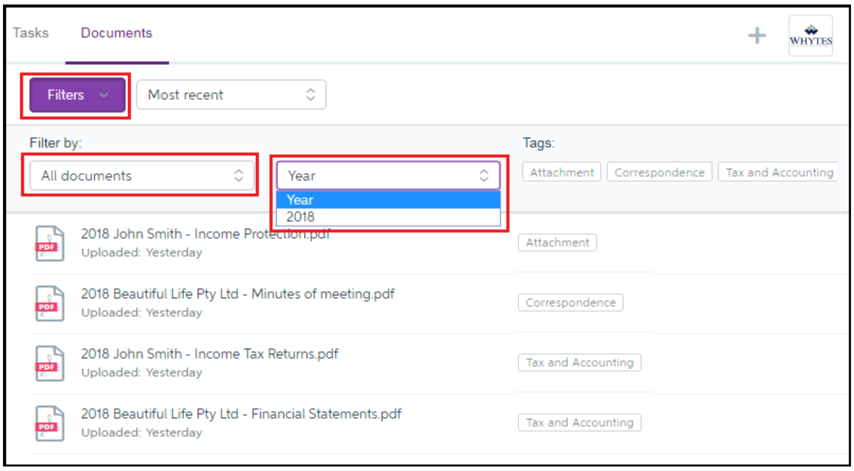
In your collaborative Whytes MYOB portal, you can:

## View a document

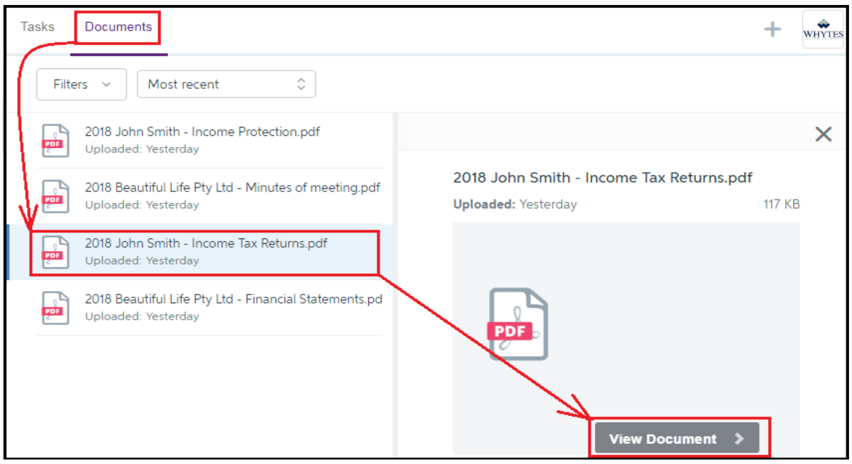
1. Click the **Documents** tab. A list of all the documents that your advisor has made available to you is displayed. Anyone who has full access to your portal will be able to view all of the listed documents.




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




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



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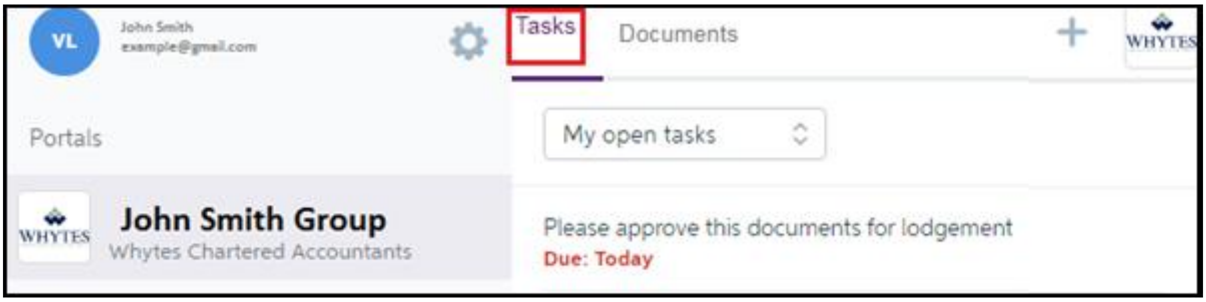
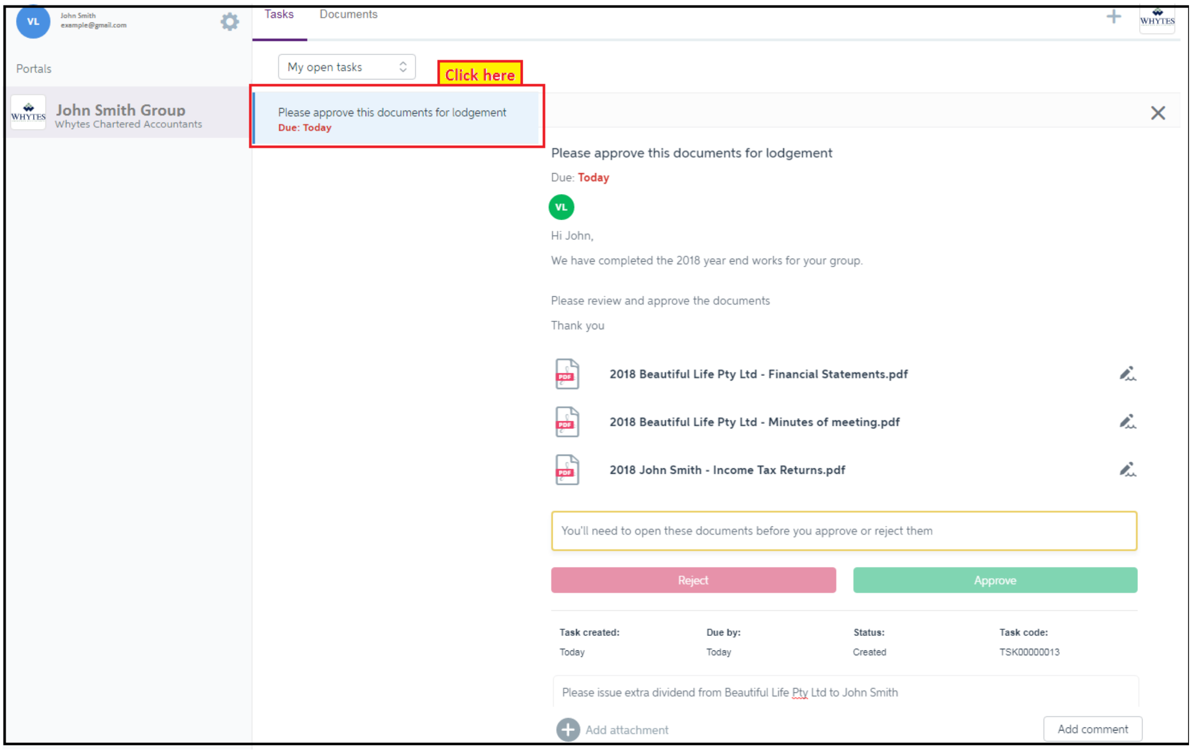
## Approve a document

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:

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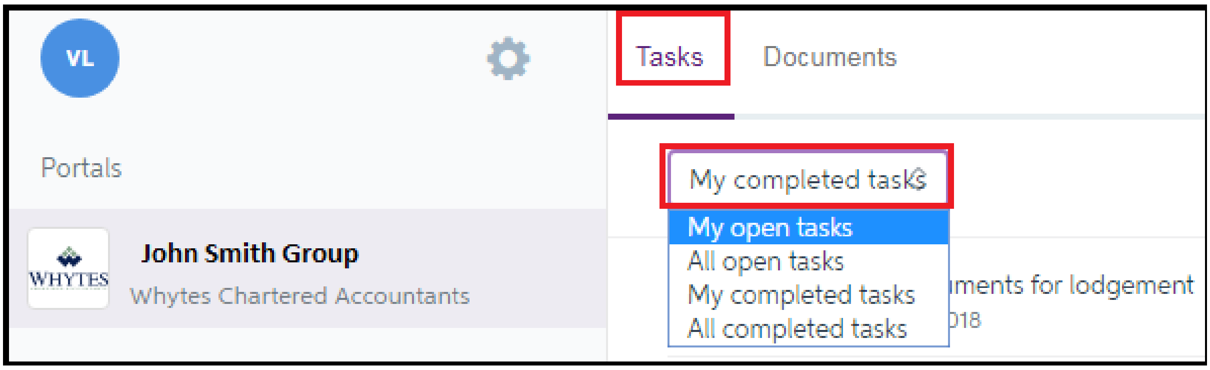
## View my task

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.

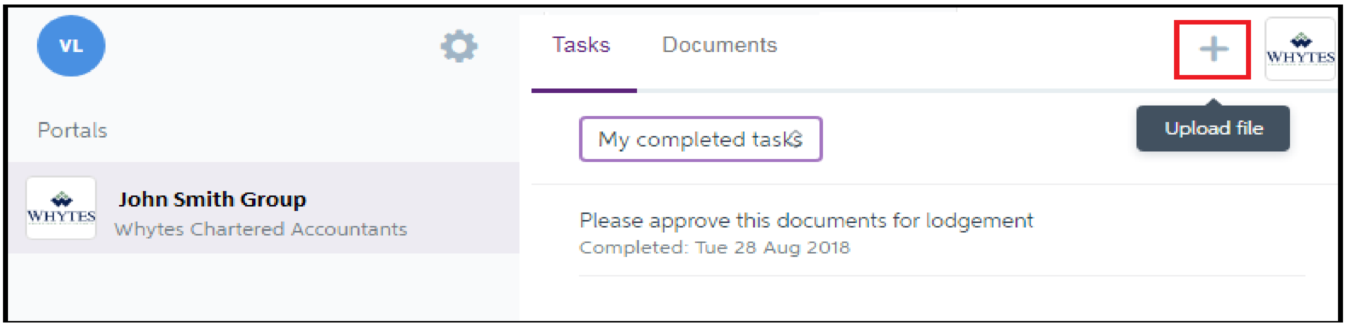
3. All Completed Tasks

    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

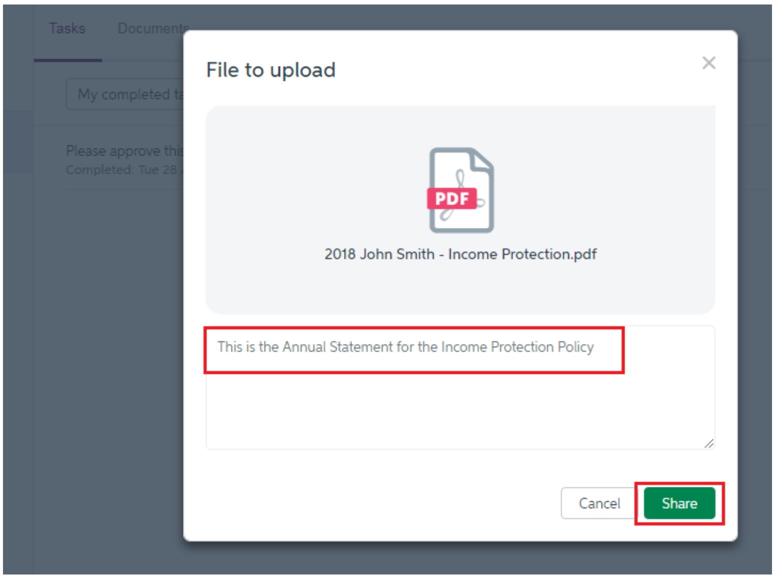
1. Click + (in the top right-hand corner) to find and select a file from your desktop or mobile device.




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.





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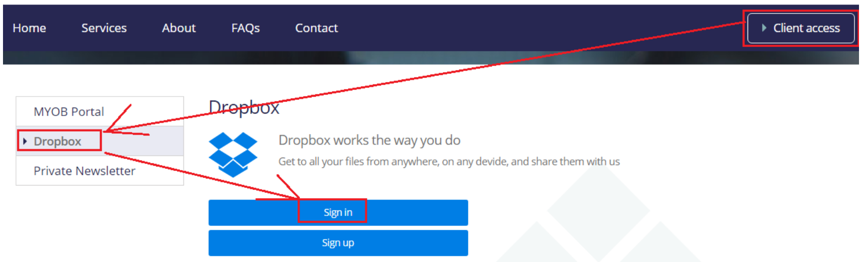
**<u>Upload a file – MYOB, Xero, Quickbook data file:</u>**

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

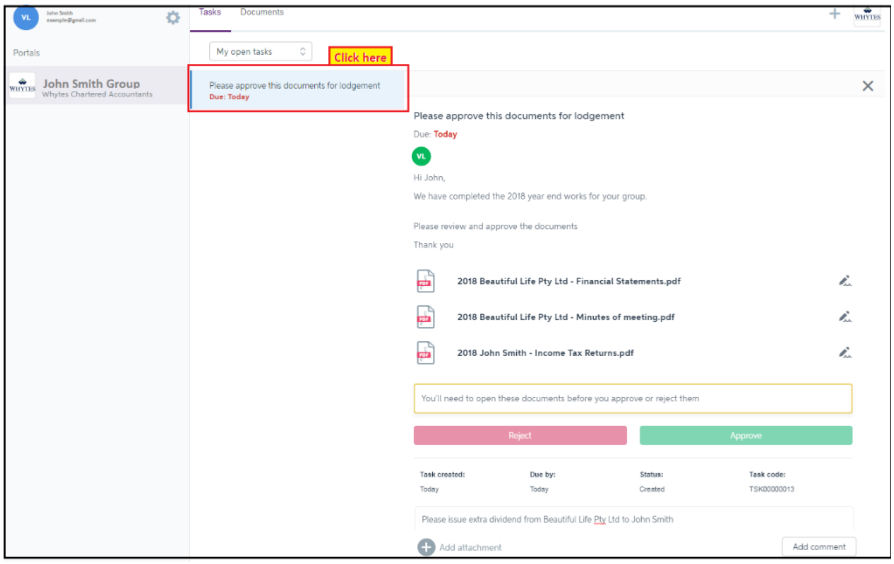
You can login to your dropbox account via our website




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

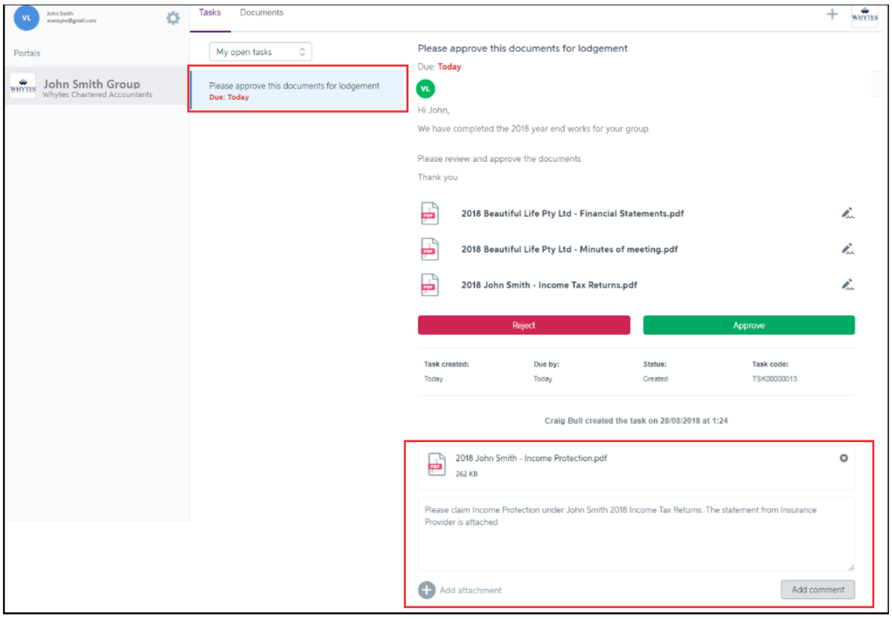
1. Click the task in the **Tasks** list to view its details.




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 × to remove it, then find and attach the correct one.




5. When you're done, click Send.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# How do I know what needs to be done?

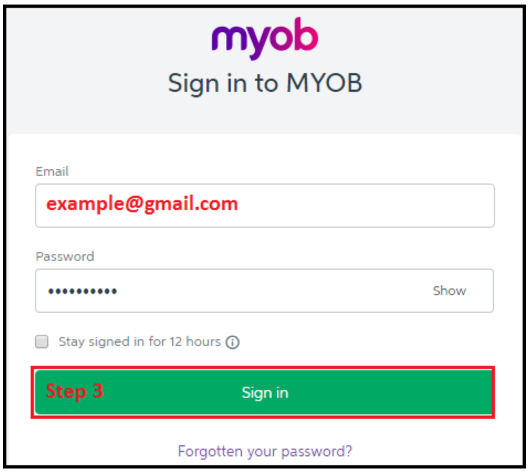
You will always receive an email from Whytes when activities occur in your Whytes MYOB portal.  For instance, you will receive an email when:

- 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

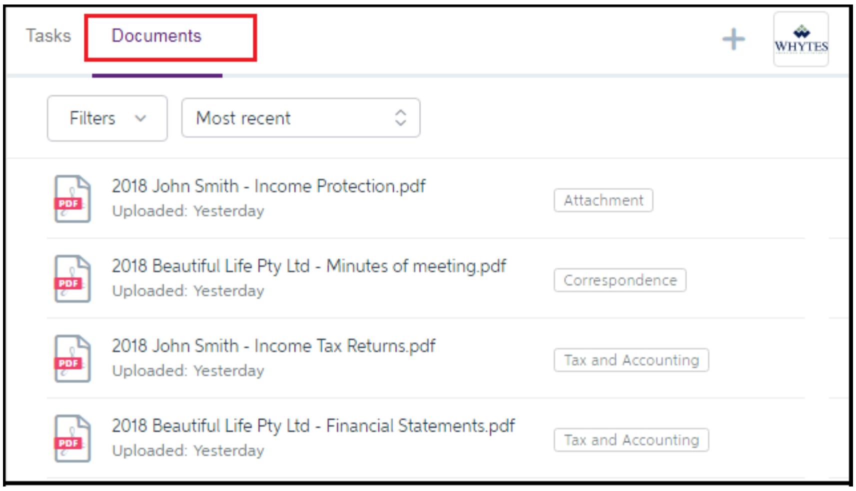

*<u>When Whytes upload a document to view and/or file</u>*

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



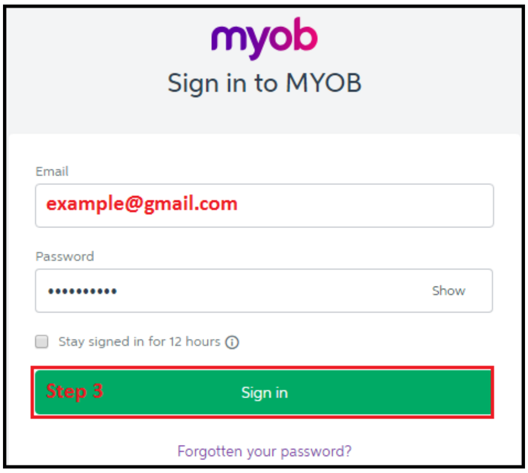

4. Select the Documents tab. Documents uploaded by Whytes for your records will be listed

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*

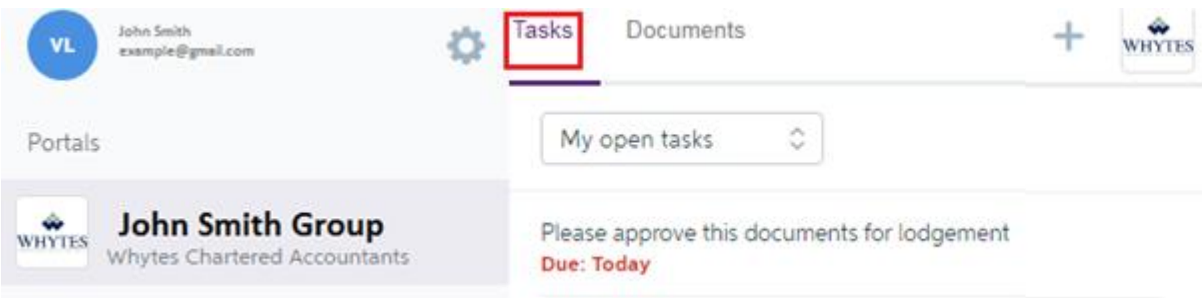
You will receive an email from Whytes advising that you need to sign a document.


1. Click “View Task” at the bottom of Whytes’ email to Sign in to your portal

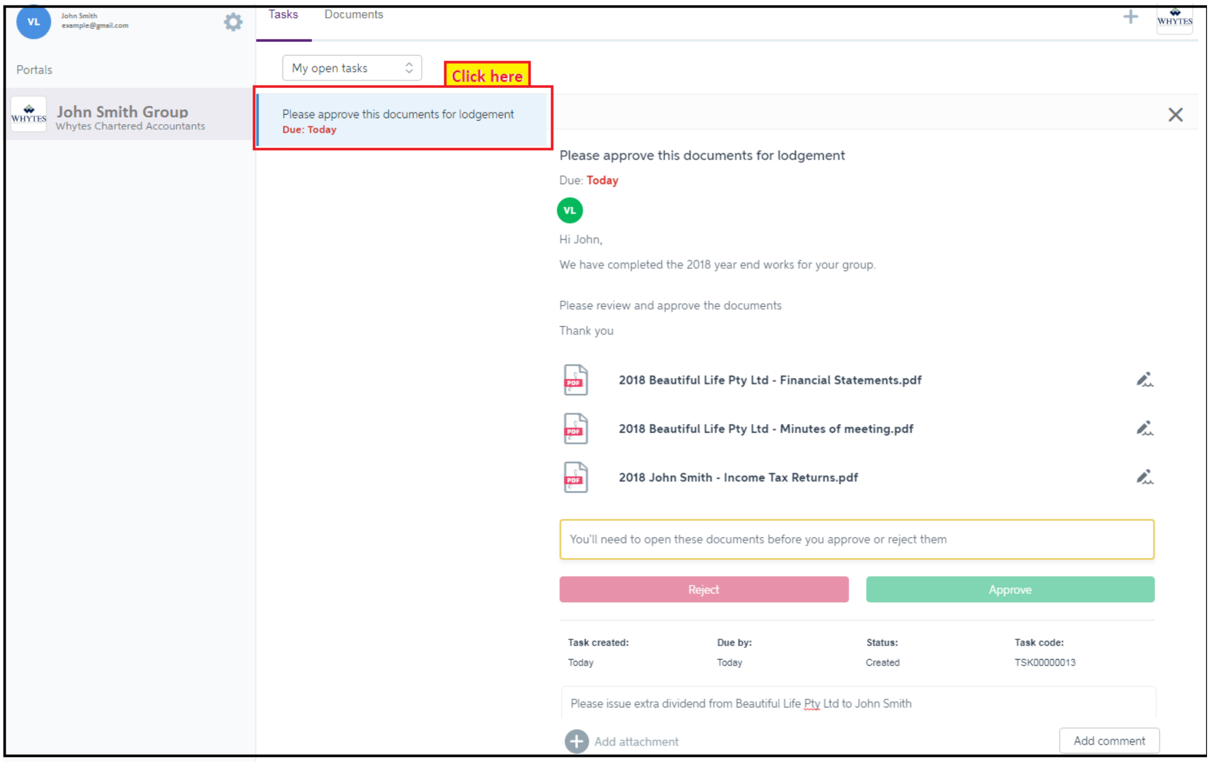



2. Enter your email address and password to Log in to your portal

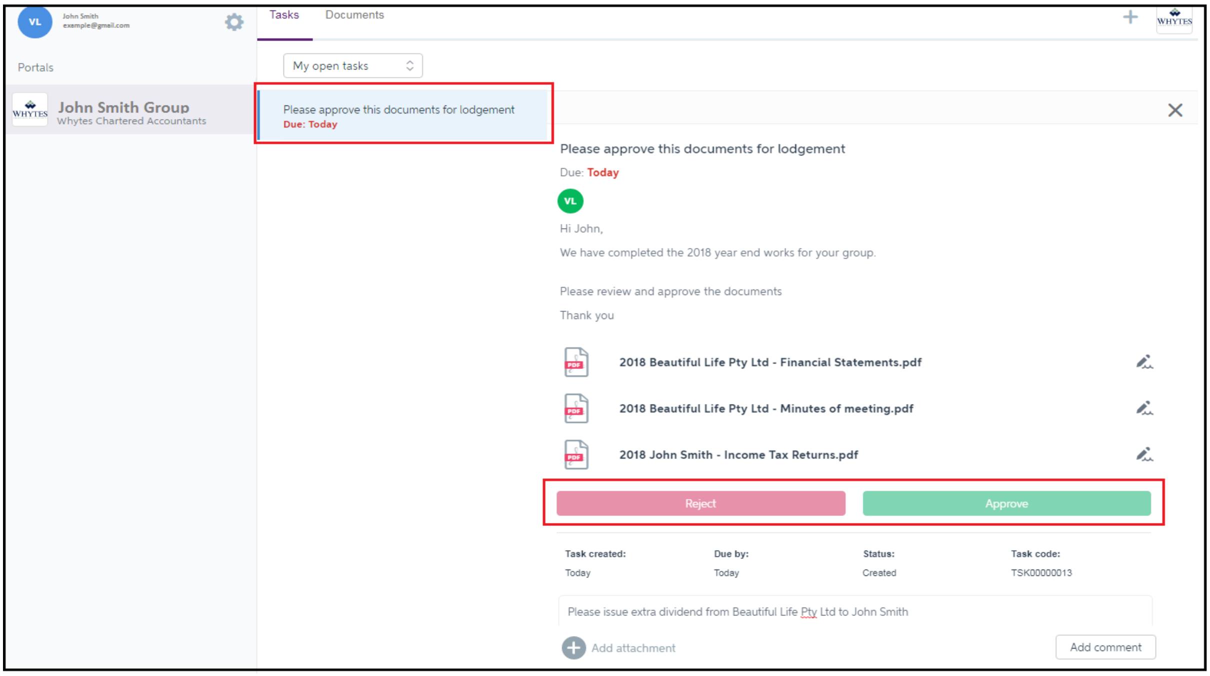
3. Select the Tasks tab



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




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.



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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