HANLEY & CO CHARTERED ACCOUNTANTS AND BUSINESS ADVISORS

Example of Accounts or Tax Return to Approve.

1 You receive an email.



2 Open the email then click on the link and log in with the password you set previously.



3 In your portal - usually a letter and accounts or tax computations and a Tax Return.



4 The document to view is downloaded below.

Home			HANLEY & CO	Welcome to your Hanley & Co Portal	dean1@hanleyandco.co.uk Account
Dashboard Your Files Upload File					
	C Refresh				
DASHBOARD	Client Name	Filename / Folder	Date Uploaded -	Size	Owner
FILES Unread Files Received 1	Dean Test (DT!)	Example of Accounts or Tax Return to Approve.pdf Documents for Approval	28/11/2020 11:41:35		28 KB Dean Logan
All Files	⊲ ⊲ 1 ⊳ ⊳				Displaying items 1 - 1 of 1
APPROVALS					
Awaiting Approval 1					
INVOICES					
Unpaid 0					
E-CHECKLIST	141 - 1	······································			
e-Checklists 0	It's ne	ere waiting for			
	VOU T	o click - or in			
	VOU	r download			
	you				
		folder.			
Hanley & Co Charter	u Accountants - Sec	ure Documents Portal		Terms and Conditions Pi	rivacy Policy Cookie Policy Help
Example of Accoupdf					Show all X

5 Please read all the way to the end before closing the document. 🙂



6 Ready to approve it?

Home			HAN	_EY & CQ_ w	felcome to your Hai	nley & Co Portal	dean1@hanleyandco.co.uk Account
Dashboard Your Files Upload File							
DASHBOARD	C Refresh						
FILES	Client Name	Filename / Folder		Approval Type	Status	Last Updated 🔺	Requested By
Unread Files Received 0	Dean Test (DTI)	Example of Accounts or Tax Return to Approve.pdf Documents for Approval		e-Approval	Approve	28/11/2020	Dean Logan
All Files APPROVALS	H 4 1 F H	1 Now click here.	2 Then here				Displaying items 1 - 1 of
Awaiting Approval (1)							

7 The approval screen.

Approve	_
Are you sure you want to approve - Example of Accounts or Tax Return to Approve.pdf?	
Click approve to embed the following information into the file as proof that you have approved this file, the PDF w then be encrypted to prevent editing.	ے If you ha query you reject it a
Name: Dean Logan Email: dea@hanleyandco.co.uk IP Address: 84.70.54.115 TimeStamp: 28/11/2020 11:54 (GMT)	send us messag
Dean Logan confirms that the information is correct and complete to the best of their knowledge and belief.	Reject
1 Click here to approve.	Cancel

8 Now it shows as approved.

Location: Home > Dean Test (1 files) > Documents for Approval						
↑ Up Opload File Oownload + I	New Folder Notify A Move	To 📋 Delete				
Name	Y Description	Y Uploaded ▼	Y Latest Download	Y Approval Type	Y Status	
Example of Accounts or Tax Return to Ap	pprove.pdf	28/11/2020 11:41:35	28/11/2020 11:50:37	e-Approval	Approved (28/11/20)	
с н 4 П ► н						

9 There might be more in your portal!



If you have any queries please call us!