VBA Client Portal

Welcome to the Victor Bimrose Accountancy Pty Ltd client portal.

Victor Bimrose Accountancy Pty Ltd is excited to introduce the new client portal. This portal is an online management system which allows you to easily and safely send, receive and store all of your accounting and tax information online.

What does this mean for you?

The client portal allows you to review and approve your accounting and tax information with the click of a button.

Why are we doing this?

It's a safer and more efficient way to handle your accounting and tax. It simplifies the process for you and allows us to better serve your individual needs.

What do you need to do?

Follow the process below to:

1. Sign up

2. Log in

3. Review / approve documents

4. Upload documents.

1. SIGNING UP

You will be sent an email inviting you to connect with the Victor Bimrose Accountancy Pty Ltd client portal.

Once you have received this invitation, please follow the below steps.

1.1. Open the email and click on "Sign in to your portal".

The email address used to invite you to the portal will already be included in this invitation.
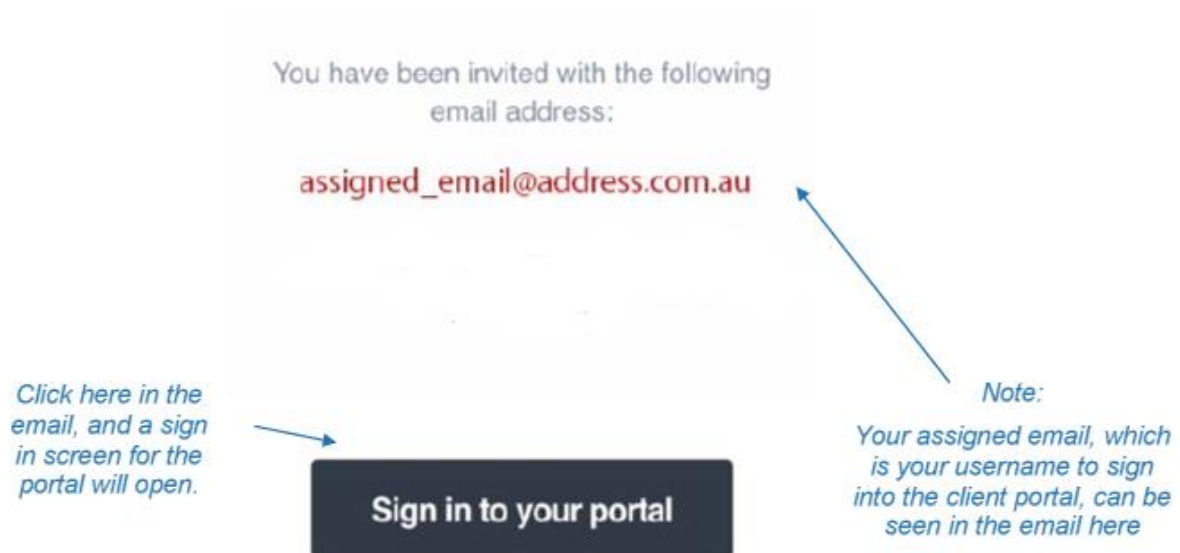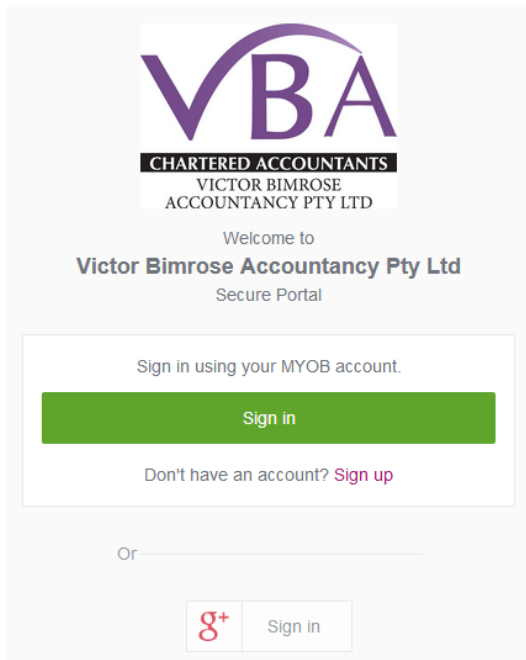

Not the right email address?

Please call us at Victor Bimrose Accountancy Pty Ltd and we will change this for you

07 5479 5499

1.2 To be set up, you will require a MYOB login.
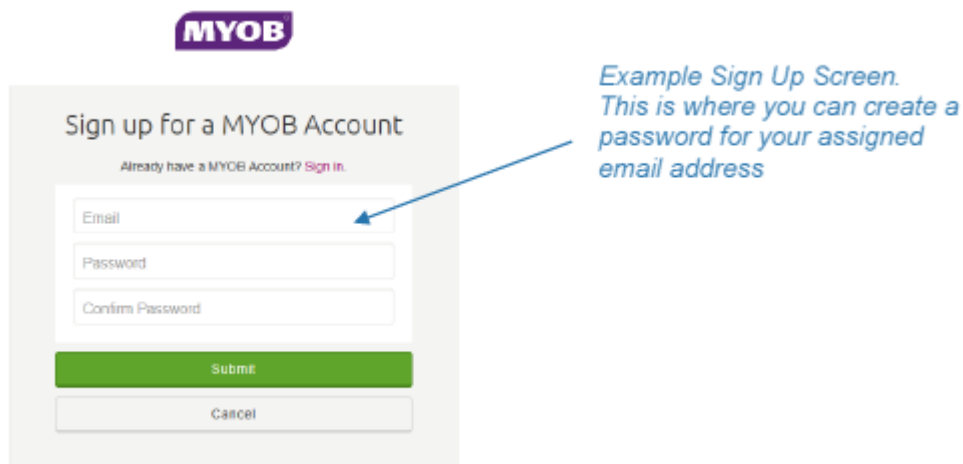

You do not need to be a MYOB software user. MYOB is the software that Victor Bimrose Accountancy Pty Ltd use for the client portal.

If you **already have a MYOB login**, you can use those details to access the portal by clicking "Sign in".

If you **do not use MYOB**, please click on the "sign up" button to create a login.

A sign up screen, as seen below, will open up.

Enter the username (email address we have assigned you), then enter and confirm a new password, and click "Submit".

2. LOGGING IN

2.1   Once you have signed up, you can access the client portal at any time.
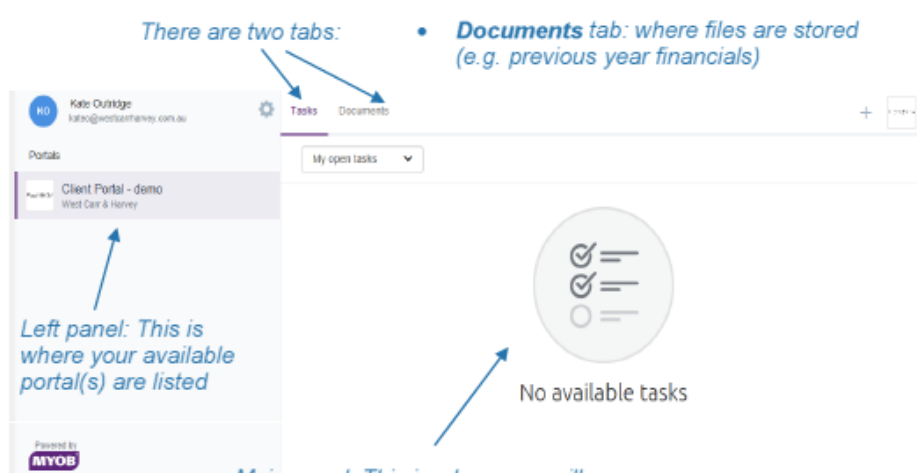
https://vba.portal.accountants

(Tip: for ease, add this link to your "favourites in your internet browser)

2.2   Once signed in, you will be taken directly to the client portal which looks like this.

3. REVIEWING / APPROVING DOCUMENTS

3.1.   When a task is ready for you to action, you will receive an email from us.

3.2.   Click "View Task" in the email notification to go to the portal

(you will be prompted to sign in).
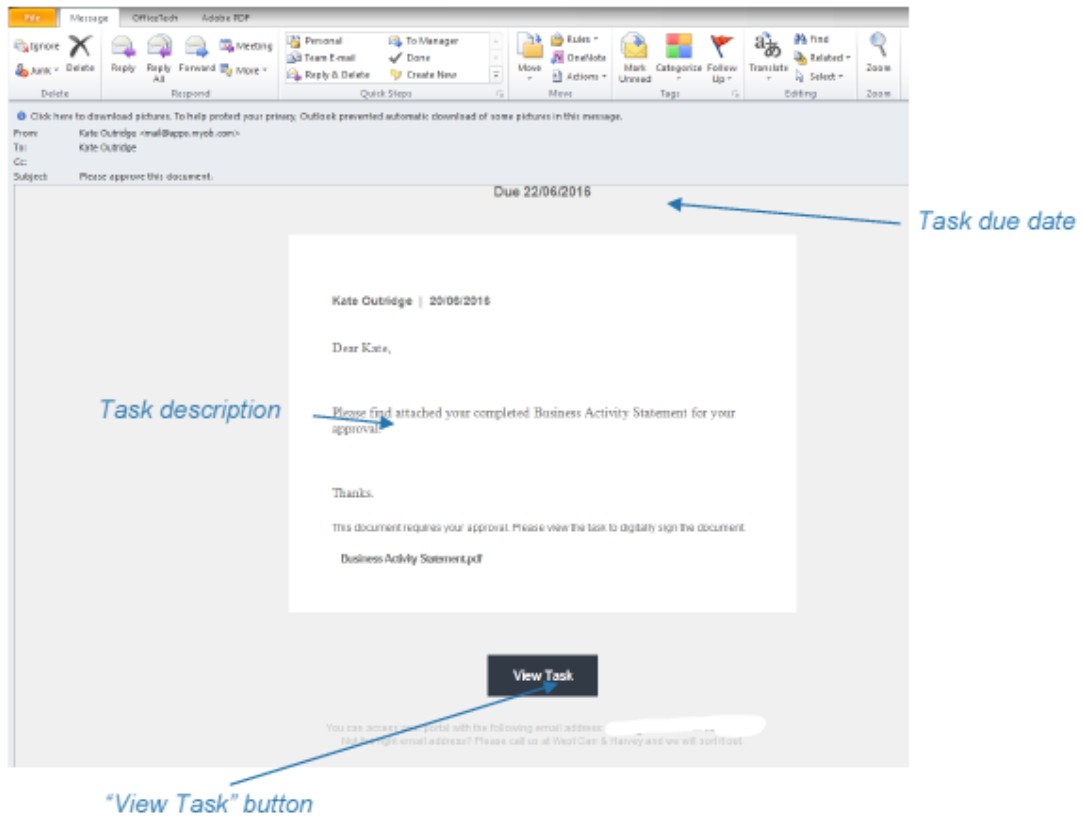
3.3.   The portal will open on the task page.

3.4.   Open the document(s) waiting for you to review.

3.5.   Once reviewed, close the document and either click "Reject" or "Approve".


Note: Documents MUST be opened to review prior to accepting or rejecting

The Green Approve Button will not become highlighted until the PDF has been opened.

3.6   When you click "Approve", a window will pop up asking you to confirm you are sure

you want to approve this document.

Clicking the "Approve" button digitally signs the document.

**Please Note** that this is a **legally binding** signature.
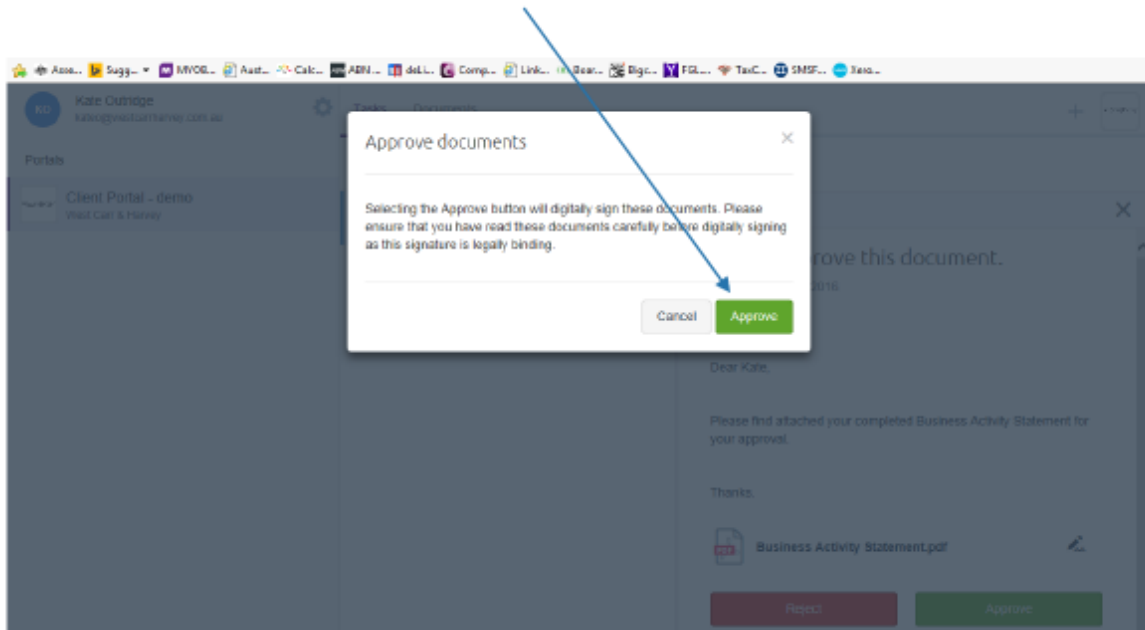
3.7   Once the document is approved, the task is complete, and the signed documents

(in pdf format) are automatically filed in your Documents tab.
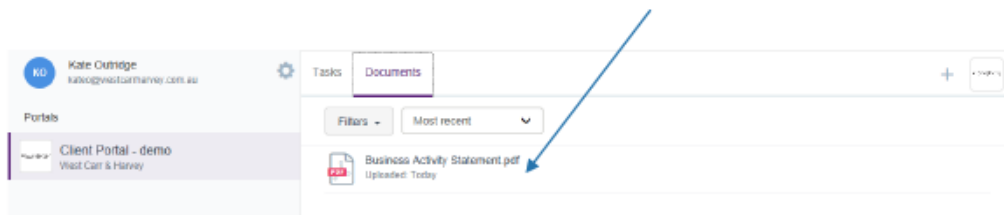
4. UPLOADING DOCUMENTS

You can also upload and keep track of all your financial documents here. Things like payslips, bank statements or receipts can be added by simply clicking the plus ("+") symbol in the top right of the screen.

The plus symbol in the top right of the screen allows you to upload documents to be sent to Victor Bimrose Accountancy.
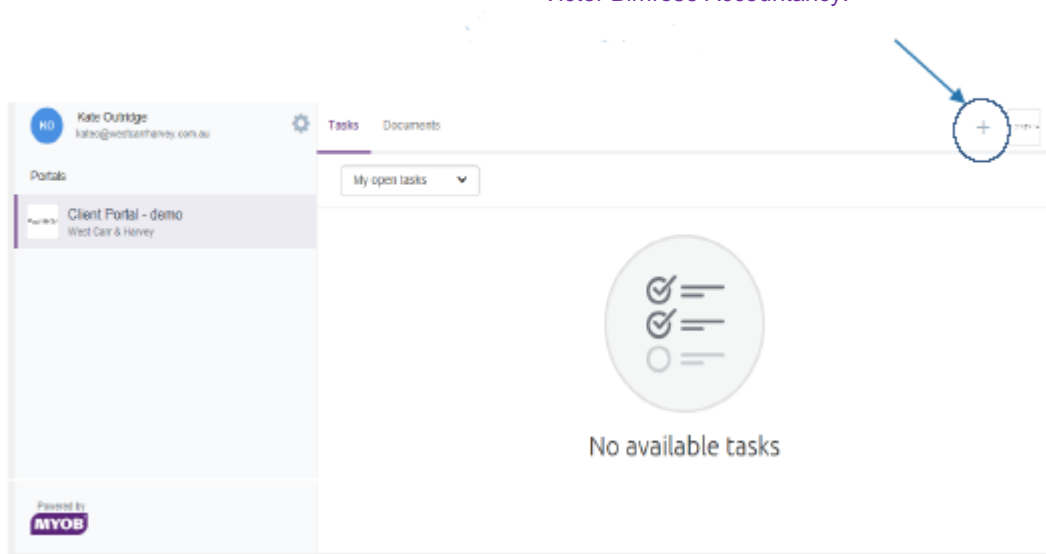
4.1   Click the plus symbol. An explorer window will open.

4.2   Browse to choose and upload the desired file (e.g. located on your computer).