

Carroll Accounting Client Portal

Activating your client portal:

1. An activation email will be sent to your nominated email address.
2. Follow the prompts in the email to activate your Secure Client Portal
3. Keep a record of your Username and Password in a secure location.

Logging In:

1. To log into the client portal follow the below link:
<https://cloud1.sagehandisoft.com.au/ClientPortal/Account/Login/CARR0014>
2. Input your Username and Password
3. If you require assistance with your login information please contact the office on 5986 2189.

The screenshot displays the Sage HandiSoft client portal for Carroll Accounting Services. The page title is 'Document Listing'. The table below shows the following data:

Document Name	Status	Date
test.pdf	Signature Requested	02/08/2018
payment slip corr.pdf	Downloaded From Portal	02/08/2018
payment slip aleisha[SIGNED].pdf	Downloaded From Portal	17/05/2018

Annotations in the image include:

- Red = Document has not been downloaded yet (pointing to the red icon in the first row)
- Orange = Document is ready to sign (pointing to the orange icon in the first row)
- Document Download Button (pointing to the download icon in the first row)
- Client clicks this symbol to upload documents (pointing to the upload icon in the top right corner)

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