



USER GUIDE

Virtual Cabinet Secure Client portal

- / Chartered Accountants
- / Business & Tax Consultants
- / Financial Planners

A history of shaping financial success

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1. Introduction

Individuals and Organisations all over the world use the VirtualCabinet Client Portal to exchange documents and information quickly and securely with their customers, suppliers and contacts.

This document is intended to assist those who have been sent documents or information via the Portal.

2. Account Activation

The first time you are sent a document through the Portal, you will receive an email notification. Before you can access the document, you must activate your account.

The email notification steps you through this process.

Simply read through the instructions in the email, and click the link within the email titled "Click on this link":



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Dear Sir/Madam,

from Kennas has sent you a secure document that requires your attention.

This email has been sent to _____ which is the address you should use when logging in. Please do not reply to this email. This mailbox is not monitored and you will not receive a response.

This document will be available in the Portal for 29 days and 23 hours.


The Portal is a secure and audited document distribution and management system used by Kennas to allow you to receive and digitally "sign" documents from within your own individual secure portal. The digital signature legally replaces a physical signature on a piece of paper.


Account Activation

Before you can access the document, you will need to follow our simple account activation process within 5 days of the date of this e-mail:

[Click on this link](#) to activate your new account. You will see your document after you've set up your account.

After clicking the link, you will be directed to a secure Activate your account page on the Virtual Cabinet Portal website.


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Activate your account: Step 1 of 2

LOGIN DETAILS

PERSONAL DETAILS

Welcome to our secure portal

Our portal allows us to communicate with you efficiently and securely.

You need to create your own password and activate your account before you can access the information we have sent you.

Email address

Password

Your new password

Confirm your new password

Next

[About our portal](#)


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Activate your account: Step 2 of 2

Almost done..

LOGIN DETAILS

PERSONAL DETAILS

Please complete the activation process as instructed.

Once you have completed this, please click "Activate account".

Once you have clicked "Activate account", you will be presented with the document, or pack of documents that was published to you.

You may now access your Portal Account at any time, from any device, using a web browser and navigating to: <https://www.virtualcabinetportal.com/MyPortal/Login>

Simply type in your Email address and Password that you used to activate your account and click the "Log In" button.

You can tick the box to remember your password if you wish.

3. *Forgotten Password*

You may now access your Portal Account at any time from any device using a web browser and navigating to the following page:

<https://www.virtualcabinetportal.com/MyPortal/Login>

And click the "Having problems?" link.

Once you have clicked the link, you will be presented with a page asking for your email address so that the VirtualCabinet Portal can send a password request link to you.



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Access Account

Enter the email address associated with your account. We'll send you a link to reset your password or activate your account if you have not already done so.

Continue

Has your email changed? If you no longer use the email associated with your Virtual Cabinet © Portal account, you may [contact](#) Customer Service for help with restoring access to your account.

You will then be presented with a page explaining that the password reset request has been entered and that you will receive an email shortly:



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Access Account

Check your email inbox.

We've sent an email with a password reset link to nathansuzietitmus@yahoo.com (if that address is registered with us).

If you do not receive an email shortly, and have checked your spam folder, an account does not exist for the email address you entered. Please check the original notification email you received as it contains the email address you need to use to access your document(s).

Important: The link will only be valid for a limited time so please make sure that you create your new password as soon as you receive the email.

Check your email inbox for the email sent by the Portal. Once you receive the email click the “Reset my password” link within it.

You will be redirected to a secure web page on the virtualcabinetportal.com website.



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Dear [redacted]

A password reset request has been received for your Portal Account. Please click the link below to reset your password.

[Reset my password](#)

This email has been sent to [redacted] which is the address you should use when logging into the Portal. Please do not reply to this email. This mailbox is not monitored and you will not receive a response.

Thank you

If you believe you have received this email in error, please notify the sender accordingly using the contact information above and delete this email. Do not reply to this message.

You will now be able to see the password reset page, allowing you to type in your new password for your Virtual Cabinet Portal account.

Ensure you follow the instructions, and click the “Save Changes” button once you are finished:



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Reset your password

New password

Enter a new password



Confirm your new password



Save Changes

Once your password has been reset, please click the link titled "Login" button to open up the login page where you can log into Virtual Cabinet Portal with your new credentials:



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Reset your password

Your password has been successfully reset

Login

4. Digital Document Signing

After clicking the link in the notification email you'll receive - and signing in -you will see the document.
An example document is shown below:

Sign
Decline

PART A Electronic Lodgment Declaration (Form I)

This declaration is to be completed where a taxpayer elects to use an approved ATO electronic channel. It is the responsibility of the taxpayer to retain this declaration for a period of five years after the declaration is made, penalties may apply for failure to do so.

Privacy
The ATO is authorised by the *Taxation Administration Act 1953* to request your tax file number (TFN). We will use your TFN to identify you in our records. It is not an offence not to provide your TFN. However, you cannot lodge your income tax form electronically if you do not quote your TFN.

Taxation law authorises the ATO to collect information and to disclose it to other government agencies.
For information about your privacy go to ato.gov.au/privacy

Electronic funds transfer - direct debit
Where you have requested an EFT direct debit some of your details will be provided to your financial institution and the Tax Office's sponsor bank to facilitate the payment of your taxation liability from your nominated account.

Tax File Number Year

Name


Total Income or Loss <input type="text" value="\$ 0"/>	Total Deductions with L1 <input type="text" value="\$"/>	Total Tax Offsets <input type="text" value="\$ 0"/>
Total Tax Withheld <input type="text" value="\$"/>	Total Credits <input type="text" value="\$"/>	Taxable Income <input type="text" value="\$ 0"/>

Declaration
I declare that:

- the information provided to my registered tax agent for the preparation of this tax return, including any applicable schedules is true and correct, and
- the agent is authorised to lodge this tax return.

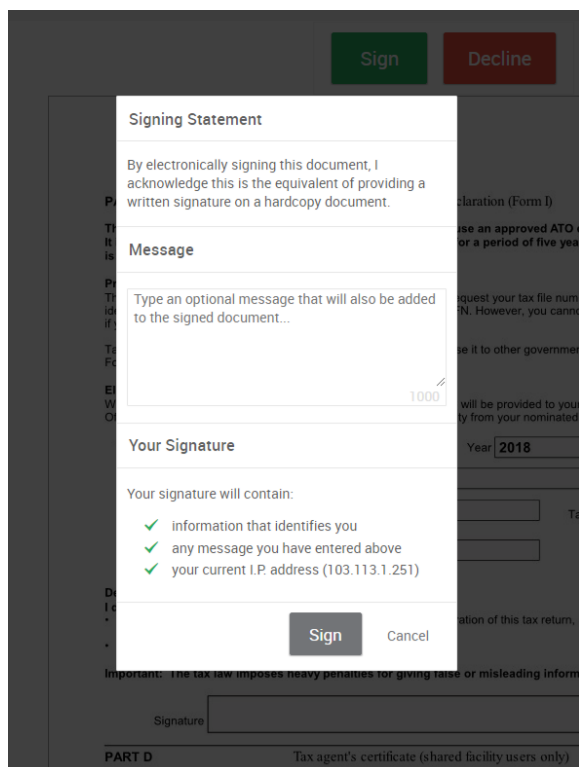
Important: The tax law imposes heavy penalties for giving false or misleading information.

Signature



To sign the document simply click the sign button at the top of the document.

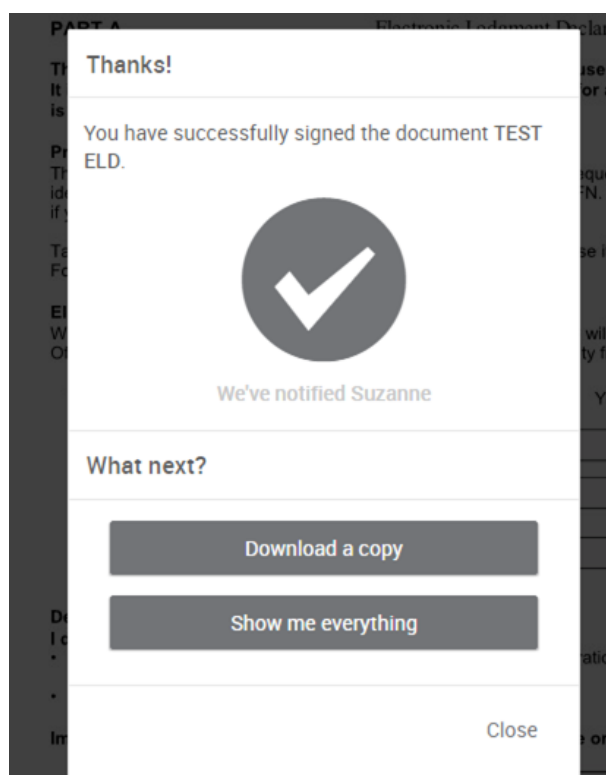
This will show a screen giving information about the signature and, if permitted by the publishing company, an area to add an optional message:



The screenshot shows a web interface with a 'Sign' button at the top. A modal dialog box titled 'Signing Statement' is open. It contains the following sections:

- Signing Statement:** A text block stating, 'By electronically signing this document, I acknowledge this is the equivalent of providing a written signature on a hardcopy document.'
- Message:** A text input field with the placeholder text 'Type an optional message that will also be added to the signed document...'. A character count '1000' is visible at the bottom right of the field.
- Your Signature:** A section stating 'Your signature will contain:' followed by a list of three items, each preceded by a green checkmark:
 - information that identifies you
 - any message you have entered above
 - your current I.P. address (103.113.1.251)

At the bottom of the dialog are 'Sign' and 'Cancel' buttons. The background of the web page is dimmed, showing parts of a tax form with fields like 'Year' set to '2018'.

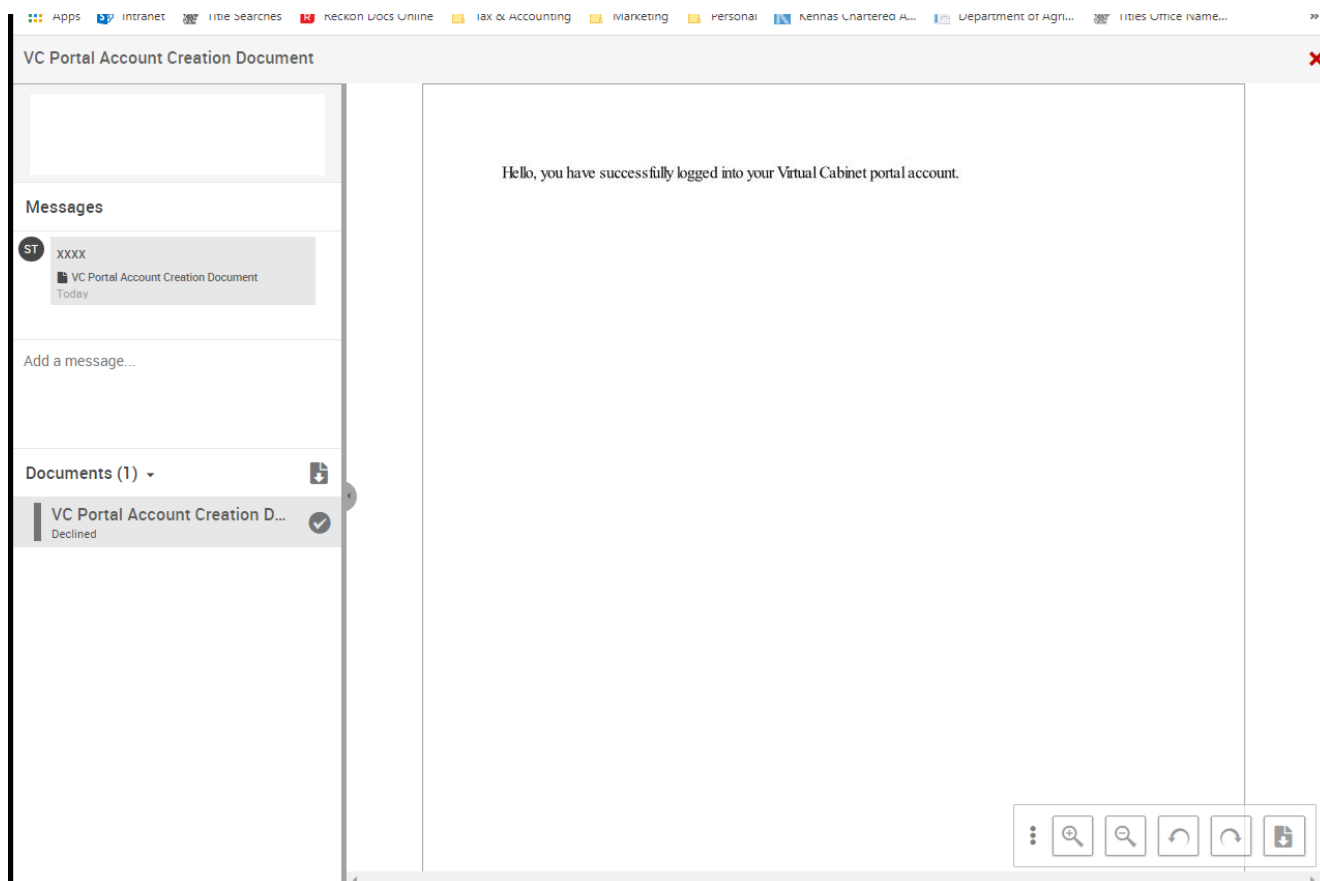


The screenshot shows a 'Thanks!' confirmation dialog box. It contains the following elements:

- Thanks!:** The title of the dialog.
- Message:** 'You have successfully signed the document TEST ELD.'
- Checkmark:** A large circular icon containing a white checkmark.
- Notification:** 'We've notified Suzanne'.
- What next?:** A section with two buttons: 'Download a copy' and 'Show me everything'.
- Close:** A button at the bottom right of the dialog.

5. *Manual Document Signing*

After clicking the link in the notification email you'll receive - and signing in -you will see the document. An example document is shown below:



To download and print the document, select the document you wish to print from the left side of the screen. You will see a preview of the document on your screen.

To download, select this icon at the bottom of your screen



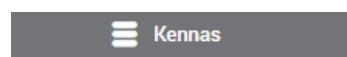
This will download the document ready for you to print, sign and save to your device if you wish.

(Internet Explorer will prompt you to open the document, Google Chrome will appear as a pop up at the bottom of your screen).

6. Sending Documents

Once you have an account with the portal you can send a document at any time via the portal main page (after logging in).

This is located under the COMPOSE box:



COMPOSE

All

Today

This week

This month

Select Compose, type a message in the box provided and attach the documents you wish to send via the secure portal.

To attach files you can drag documents from the file in which they are stored on your computer, or click the box under Documents and this will open a page where you can select where these documents are stored. Click Send.

To:

Message

Type an optional message...

1000

Documents

Drag & drop or click here to attach documents...you need to add at least one

Send

Cancel

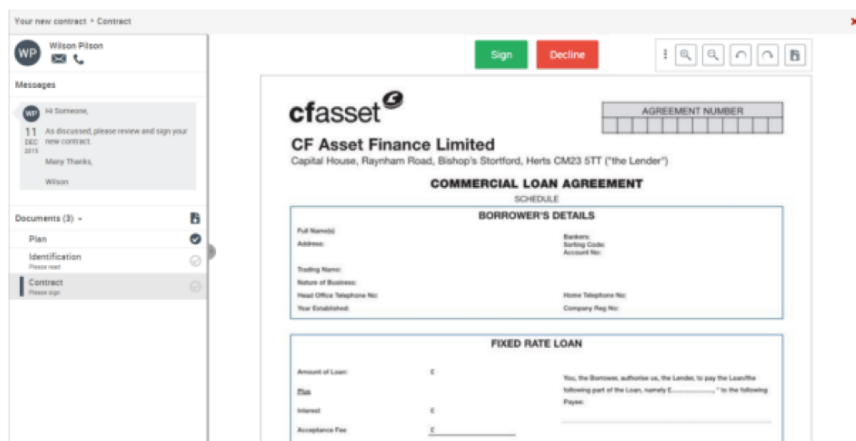
7. Authenticating your Device & Browser

This process will only need to be followed if you need to perform a task on a document, such as digitally sign it.

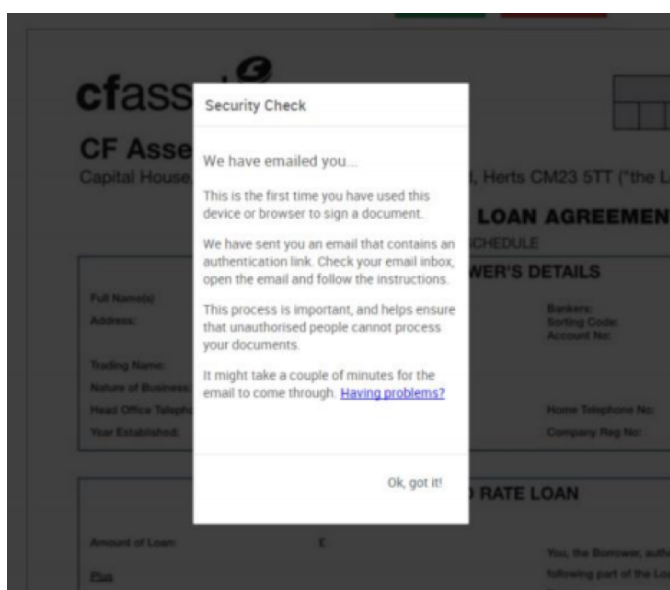
It will only be triggered if you are trying to perform such a task for the first time on a new device or using a new internet browser.

Signing a document needs to be a highly secure process, so we need to be assure as possible that your Portal Account has not been compromised.

When you are asked to sign a document, the email notification you receive will say so, and the Sign and Decline buttons will appear when you access the document in the Portal.

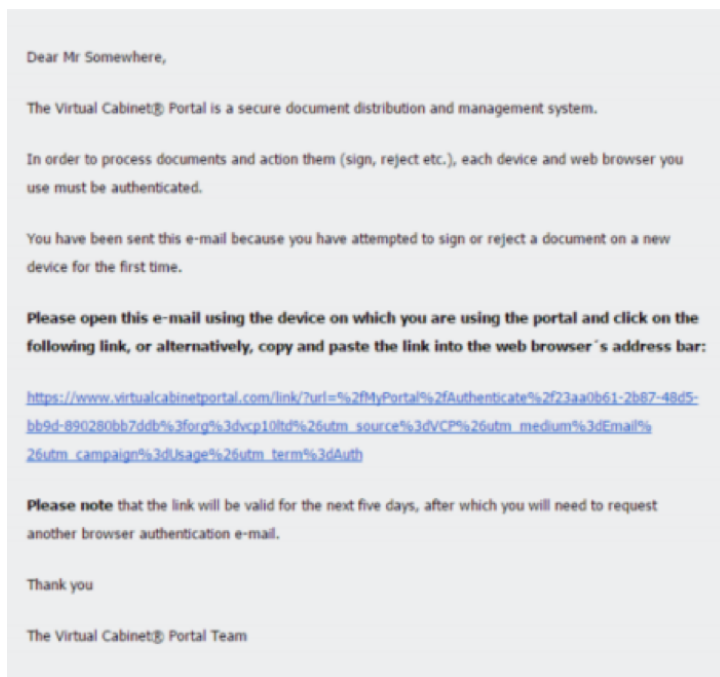


When clicking the Sign button, you will be presented with a pop-up notification stating that you need to authenticate your device or browser and that you have already been sent an authentication email.



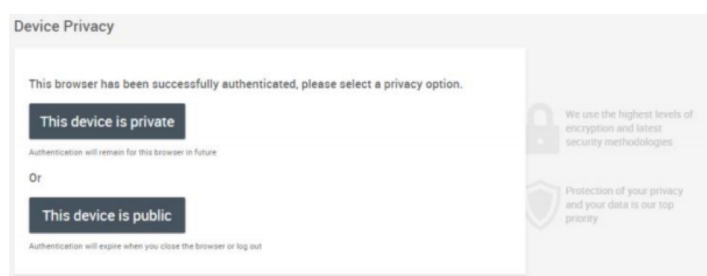
When you open the authentication email, there will be a link that you need to click to enable the current device for signature approval.

Make sure you click or use this link on the same device and browser that you are using to sign the document.



The link will take you to a Virtual Cabinet webpage where you can specify if this device is for private use, or is a shared device.

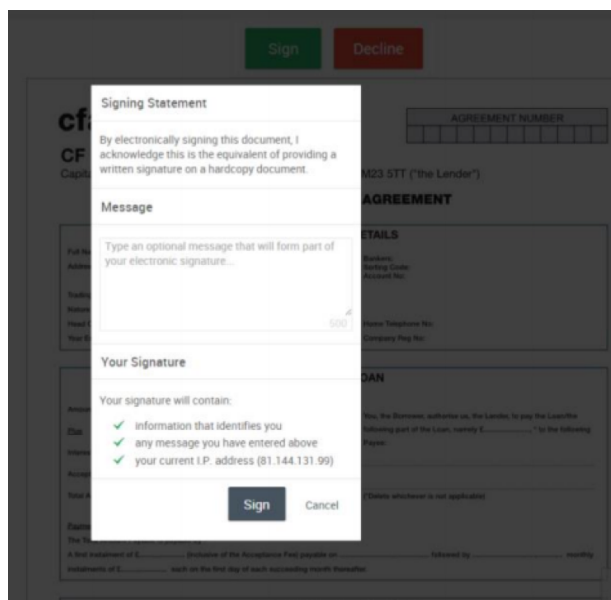
Select the appropriate option.



You will then be allowed to continue with the signing process. A pop-up will be presented asking if you would like to add a message to the document you are signing.

Feel free to create a message, and click the "Sign" button to sign and send the document:

Feel free to create a message, and click the “Sign” button to sign and send the document:



Once you have clicked this, you will receive a pop-up message stating that the document has been signed and returned.

8. Troubleshooting

If you are having any issues with accessing the Virtual Cabinet Portal web-page, or logging into your Portal account, there are a few steps that you can take...

- Trouble related to accessing the Portal web-page may be due to networking issues. You may want to check your internet connectivity (either wired or Wi-Fi) and ensure that you do not have the website in your blocked URL settings.
- When logging on to the Portal, please ensure you use the email address and password that you provided when activated your Portal account. Double check the email address by checking the notification you received from the Portal.
- If you are using autofill information within the Portal when logging in, ensure that there are no blank characters before or after your user credentials as this can cause login issues due to the 50 character limit.
- Ensure you are using the latest version possible of your web-browser as this will help with navigating the site, and will allow you the most functionality of the Portal. This also helps to keep your browser safe from vulnerabilities.

- If your browser has add-ons, extensions, or toolbars that have been installed then these can interfere with the usability of websites, including the Portal. If you have any issues relating to the Portal that seem unusual, try installing another browser, removing the add-ons/extensions/toolbars, or resetting your current browser back to its default settings. Recommended browsers are Internet Explorer, Google Chrome, Mozilla Firefox, and Apple Safari (browsers are not limited to those mentioned above).
- Ensure your cookies and JavaScript settings are correctly configured in your browser. If these may be causing you a problem, try resetting the browser back to factory defaults as mentioned above.

9. *Instructional Video's*

Click on the links below to access instructional video's to assist with using the Virtual Cabinet Secure Client Portal.

[Activating your account \(for first time users\)](#)

[Viewing & Signing Documents](#)

[Authenticating device/browser \(first time signing or on a new device/browser\)](#)

[Resetting your password](#)

If you have any further issues with Portal documents, please contact us for assistance.

FOR MORE INFORMATION Contact



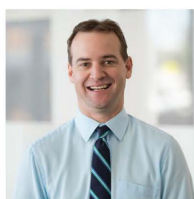
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