ACCOUNTOR CLIENT PORTAL
CLIENT INSTRUCTIONS

02/2024 SS

WELCOME TO ACCOUNTOR CLIENT PORTAL

Index

Access to Client Portal

https://portal.accountor.com/

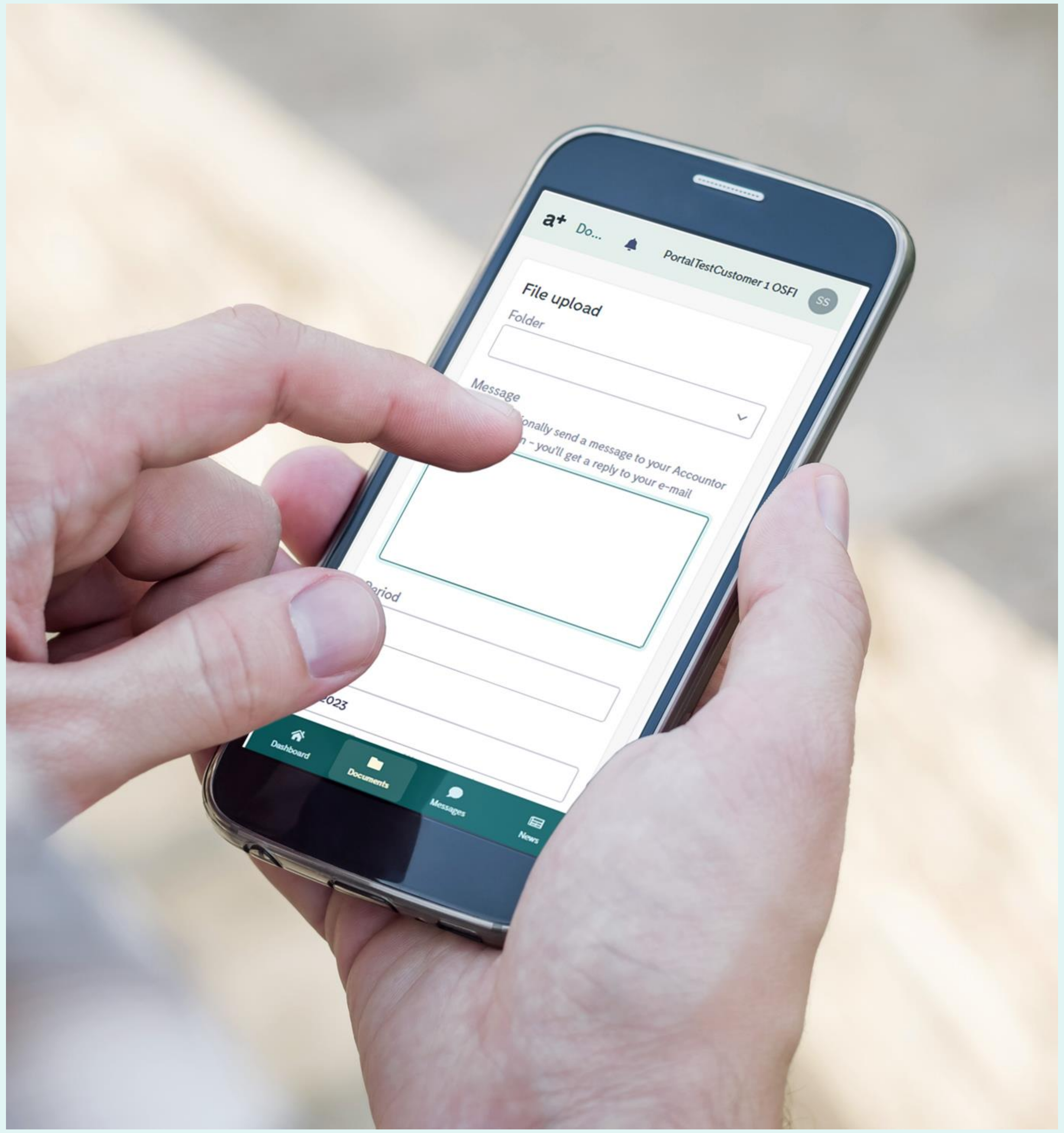
Client portal is secure platform for exchanging documents between you Accountor. There's also possibility to contact us by sending a message individually, or while uploading the documents. You can use the Messaging functionality also, when you need assistance with using the portal.

Documents are arranged to folders according to the service, that makes it easier for you to find suitable documents. In portal, you can see all the folders that you have permissions to.

If your company does have multiple users in client portal, at least one of you are nominated to portal admin user. The admin user can add more user accounts to the portal, and the admin user can also set the permissions for folders in portal. It is possible to restrict access so that only certain users can access certain folders.

If you are the only portal user at your company, you are automatically set as admin user, meaning, that you can also add more users to the portal, if needed.

Admin user needs to add permissions to folders, if needed. Folder permissions are not set automatically.



BEFORE YOUR FIRST LOGIN

Multi factor authentication

For providing the high-level security, Accountor Client Portal uses multi-factor authentication method: in addition to username and password, you are asked a one-time passcode, that will change each time you are logging in.

You can retrieve the one-time passcode in two optional ways:

1. **Authentication application**. Users who use netbanks and such services, are probably already familiar with authentication applications.

   If you already have Google or Microsoft Authenticator installed in your smartphone, you can use that existing app also with Portal. If you don't have the application yet, you can download and install it from the app store/market. Make sure that you have downloaded and installed the app before your first login to Portal.
2. **SMS message**. You can also retrieve the one-time code via SMS message. You will receive a message with one-time code each time you will log in to the portal.

Enabling the authentication application

When you are logging in to the Portal for the first time, during the login procedure, you will see a QR code on the screen. Open your authentication application, and press the (+) symbol, that is usually located on the top right corner of the application screen. Read the QR code with the authentication app and follow the instructions on the screen of your smartphone.

The authentication application is now enabled and ready to be used with logging in to the Portal. From now on, check the 6-digit one-time code from your authentication app every time, when you are logging in to the Portal.

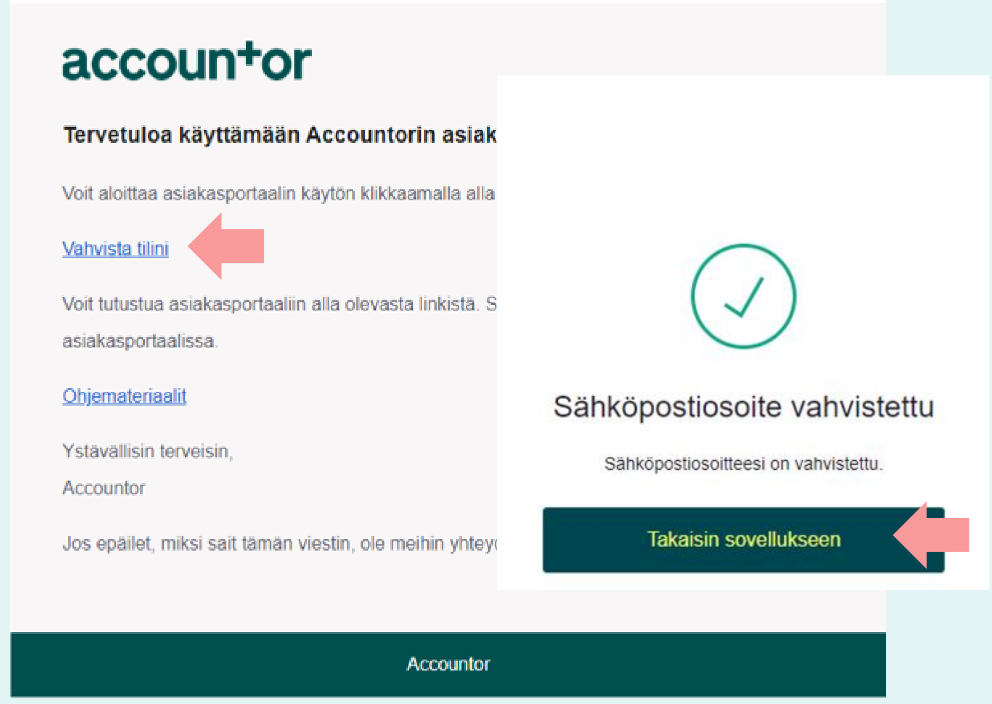
Should I use the authentication application or SMS authentication?

The table below may help you in deciding, which one of the two authentication method would be most recommended for you.

	App	SMS
I want the most secure option to use.	●	
I have a smartphone.	●	
I dont have a smartphone.		●
I don't want to install any applications to my phone.		●
I already have an authentication application.	●	

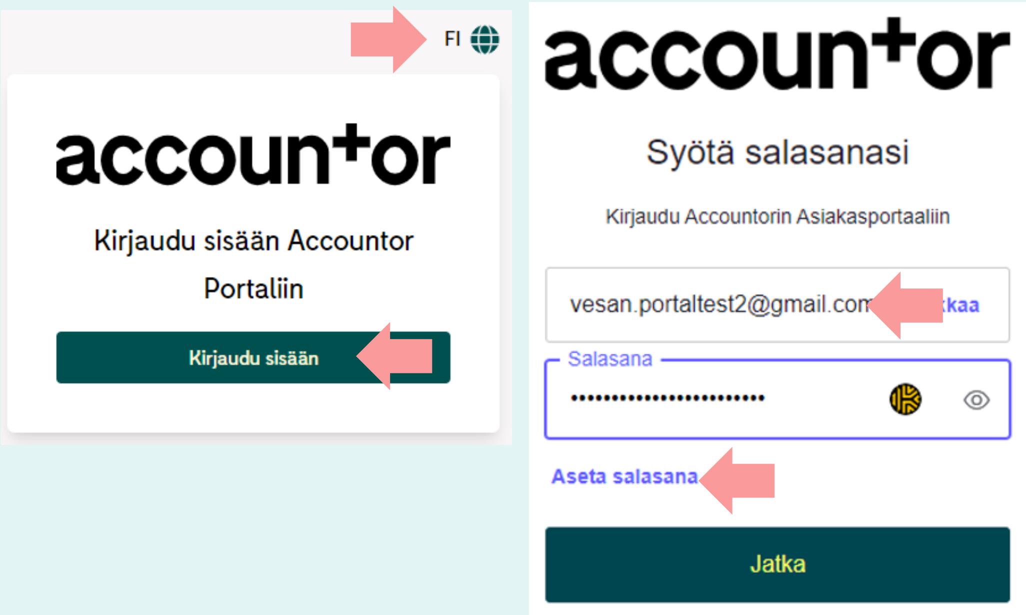
VERIFYING YOUR ACCOUNT

1 Verify your account by clicking the link that will be found from the welcome e-mail. Then, click **Back to application** button, that will lead you to the login page of Portal.

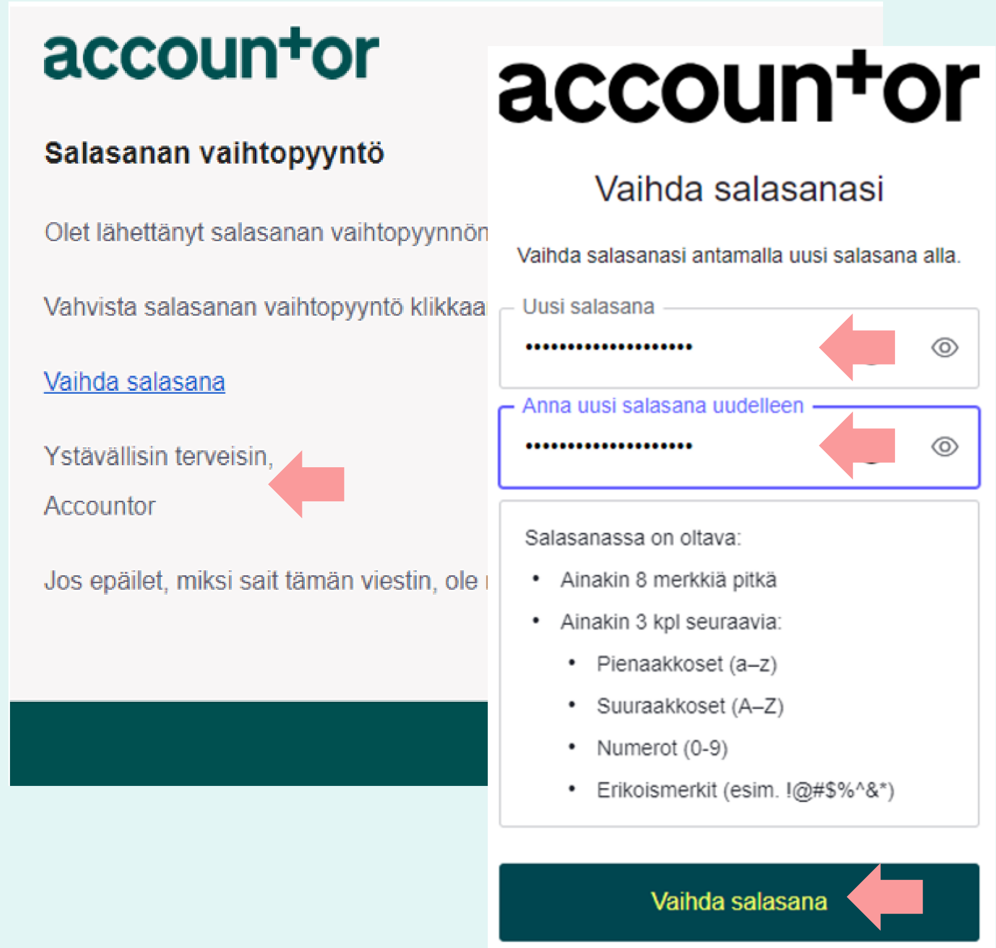


2 Start by clicking ”Log in”. You can change the language by clicking the icon from the top right corner.

In your first login, you must set your password. Enter your e-mail, and then click **Set password**.

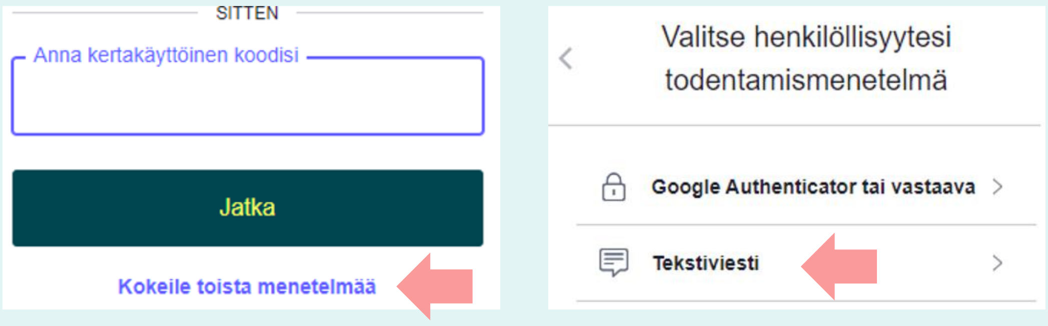


3 Set a new password by clicking the link in e-mail message that you have just received. Set a password by entering it twice by following the instructions on the screen.



4 Log in by using your e-mail and password that you have just set.

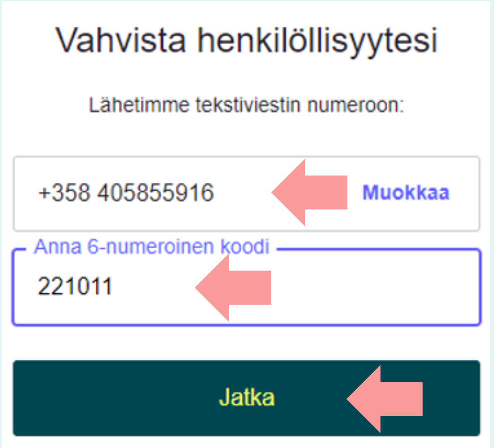
5 If you are authentication via SMS, click **Use another method** –link and click the **SMS** option.



5 If you use the authentication application:

Enable the authentication application as described on the previous page and enter the code from the app to the login screen. Click **Continue**.

6 Enter your phone number on the screen as instructed and click Continue. Wait until you receive the 6-digit code to your phone as SMS. Enter the code to the login screen and click Continue. You are now logged in.



Client user instructions

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LOGGING IN AND OUT

The login link can be found at Accountor website. You have also received the e-mail message containing the link, when your account was added.

1. **Select the language and enter your login credentials.**

   Select the preferred language if needed and click Log in to continue.

   Fill in the username and password.

   Your e-mail address is used as your username.

2. **Enter the 6-digit authentication code.**

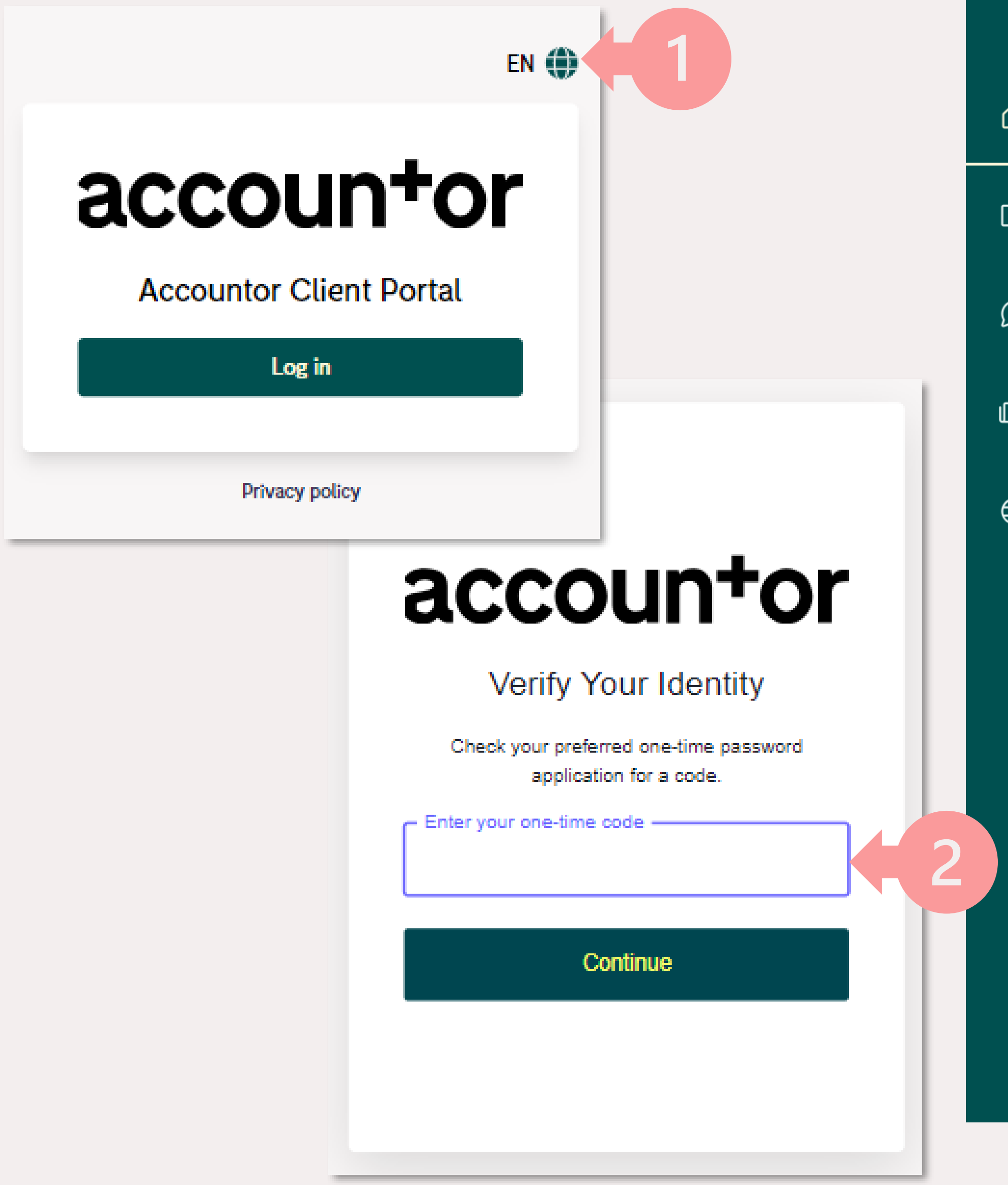
   Depending on authentication method you have chosen during your first login, the code will be provided either to your authentication app, or SMS message.

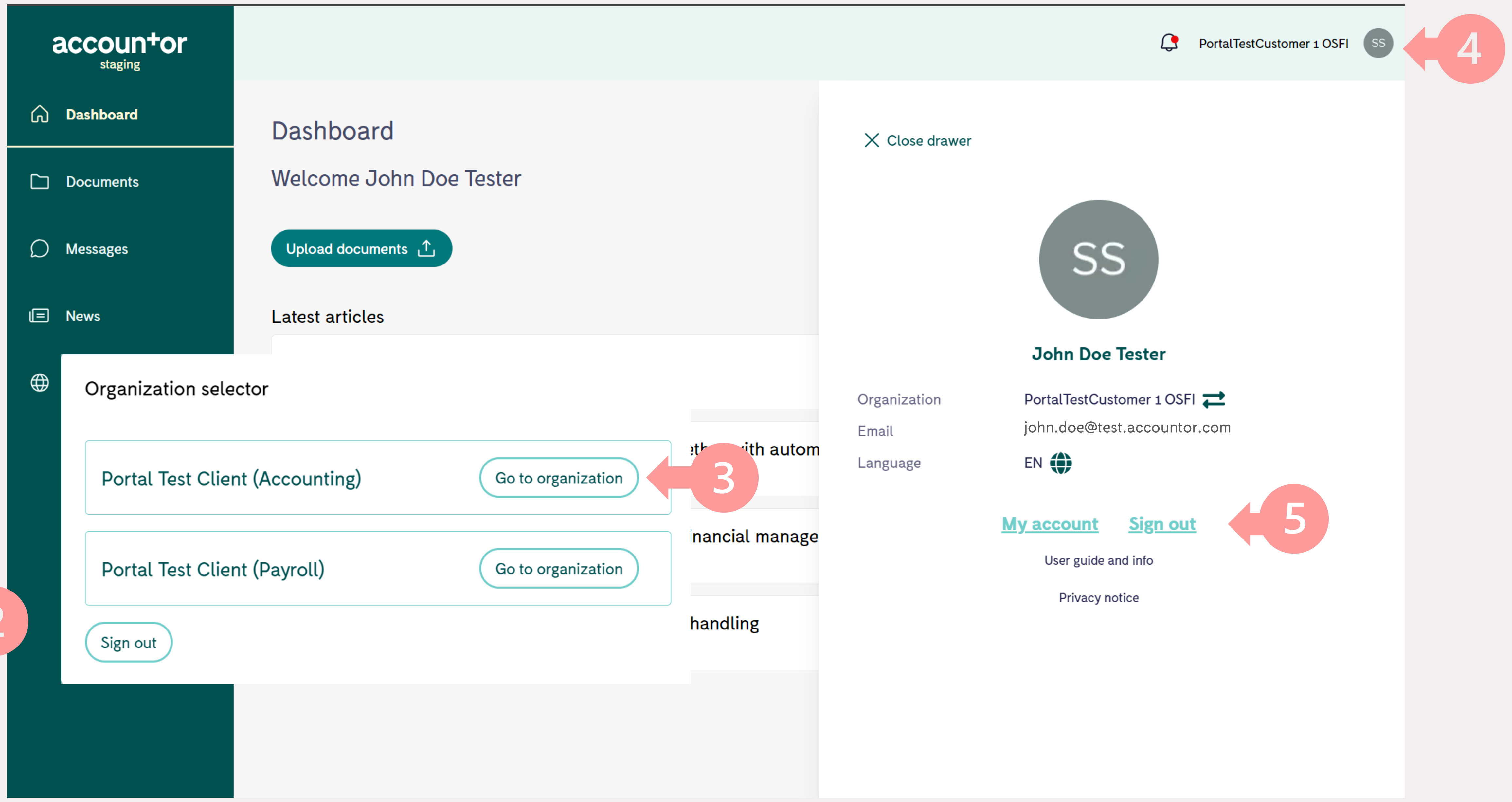
3. **If you have multiple organisations,** select the organization you want to work with.

   You can easily switch to another organization without need to log in again, by clicking the current organization name from top right corner.

4. **To log out,** open the user menu by clicking the icon.

5. Click **Sign out** to log out from the portal.





COMMON FUNCTIONS

1. **If there are new/updated documents** and your notifications are switched on (see page 10), the red dot will appear here. You can see the list of notifications by clicking the symbol.

   You can also receive notifications to your e-mail by enabling the notifications from User menu (3).

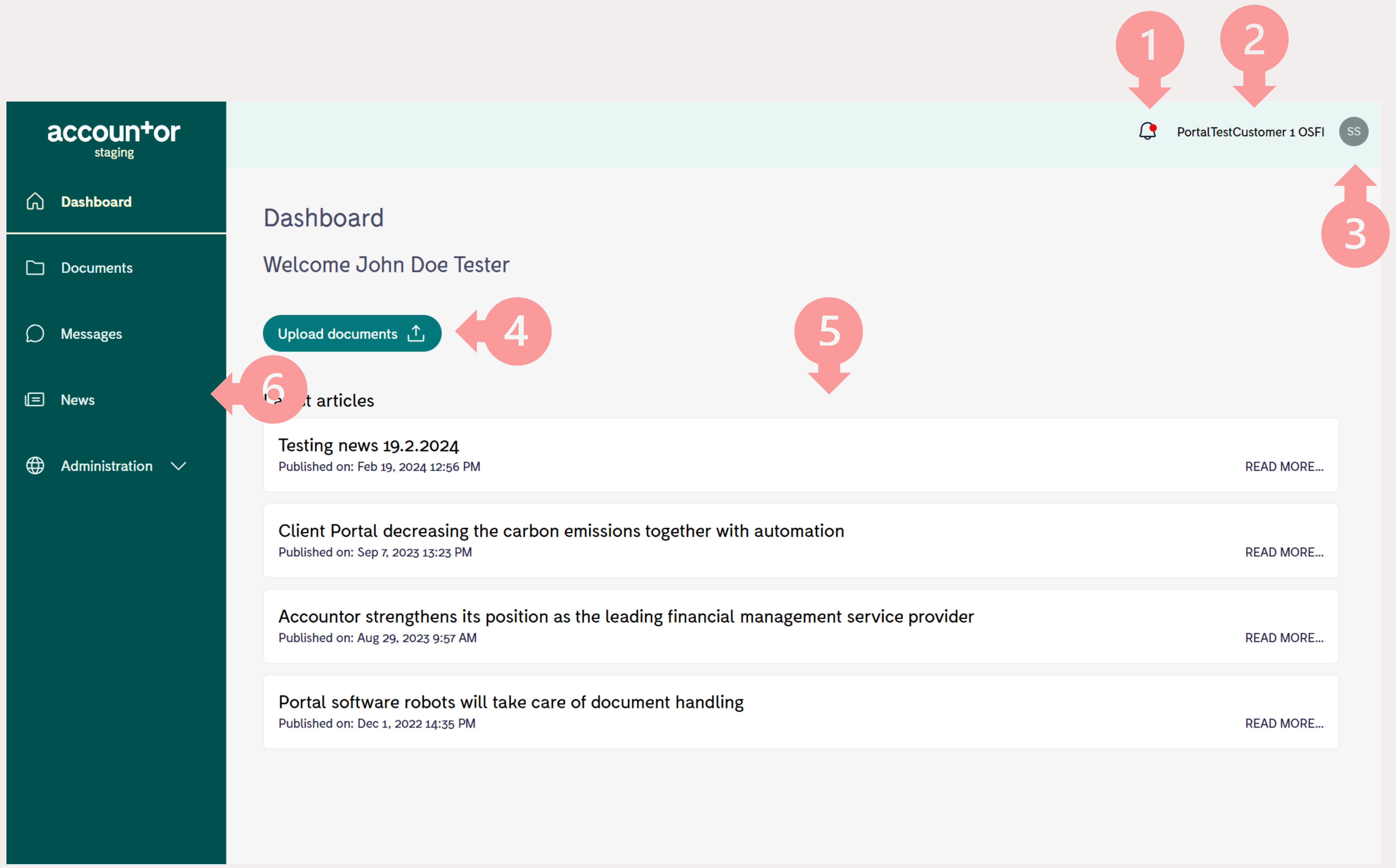
2. **The name of your current organisation** is shown here. If you have multiple organisations, you can switch between organisations by clicking the name of current organisation.

3. **User menu** to adjust to your settings:
   - Organisation selection
   - Language, name and password
   - Notifications settings
   - Privacy information
   - Logout from the portal

4. **Shortcut** link to documents upload (see page 7)

5. **Latest news**. You can read the full article by clicking the topic.

6. **Main menu** for selecting the core functions:
   - **Dashboard** for quick outlook of latest most essential things.
   - **Documents** for documents uploading, browsing and downloading
   - **Message** for contacting your Accountor service contact person
   - **News** for reading service-related news and announcements
   - **Administration** (visible for client admin uses) for managing permissions and users



UPLOADING DOCUMENTS

1 **Choose the folder** to your documents. According to your permissions, you will see one or several folder options, where to upload documents.

Contact your company's Portal Admin, or Accountor contact person, if you need assistance with selecting the correct folder for your documents.

If you accidentally uploaded incorrect document that needs to be removed, please contact Accountor. You cannot delete the documents by yourself.

2 **If you want us to get back to you,** write an optional message. Add a message only, if you need interaction with us.

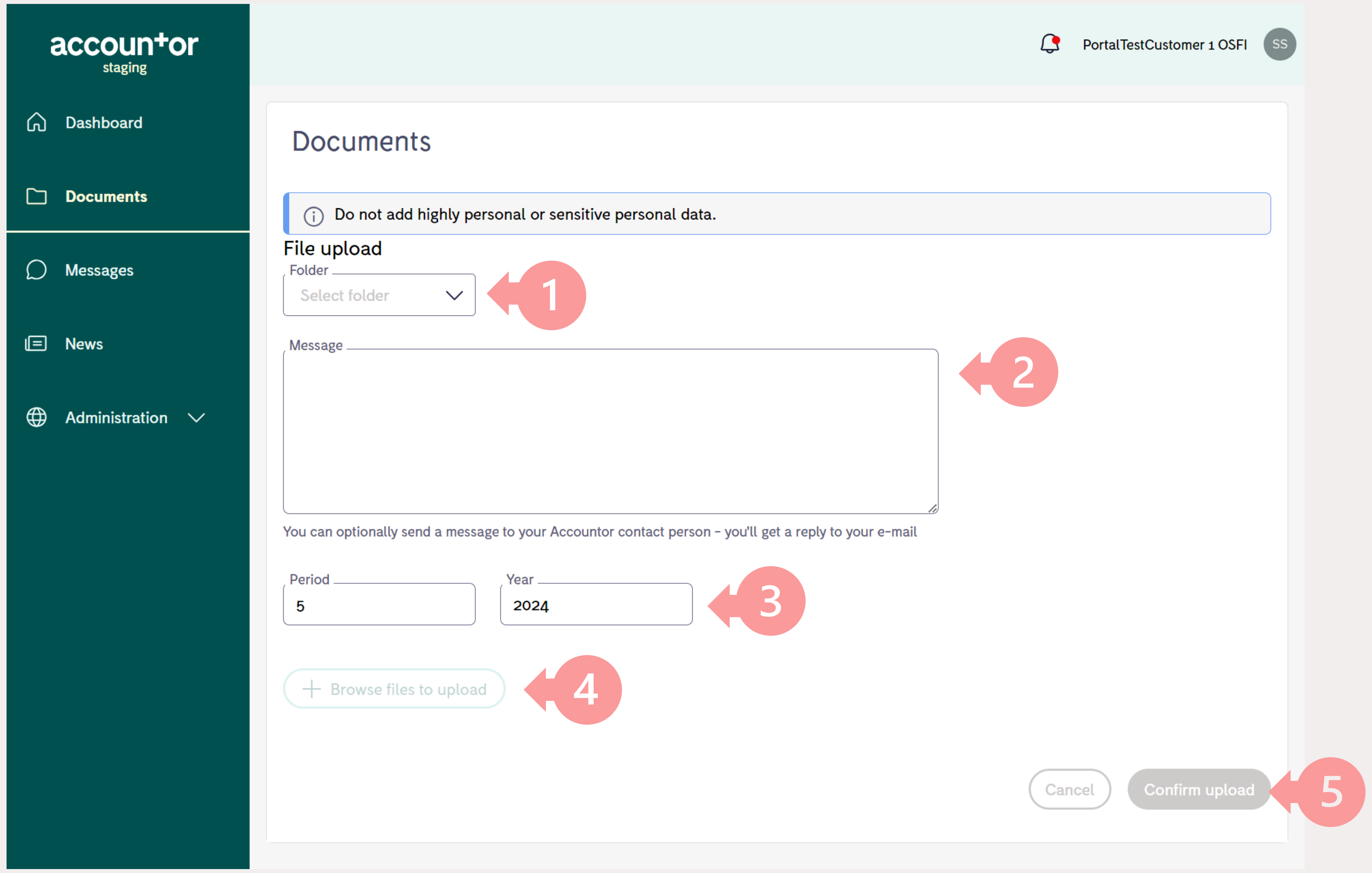
We will reply to your e-mail. Do not include personal information to message.

3 **Period and Year** are automatically selected, but if you need to provide documents for other than current service period, you can change them.

Contact your Accountor contact person, if you need assistance with selecting Year and Period.

4 **Click the Browse** button to select documents, that you wish to upload to the portal from your local device.

5 **When you are done** with selecting the documents, click Confirm upload button to start uploading documents.



If there is already a similarly named document in the same folder with same year & period, the portal will ask your confirmation, whether you want to override the existing document, or cancel the upload.

Documents will be stored in portal for 6 months from uploading. You will get a notification in advance, when the retention time will get closer.

ACCESSING DOCUMENTS

1. **Upload new documents**

2. **Filtering options.** Select, which documents to show in the documents listing. If no options are selected, all documents will be displayed.

   File name: search documents by filename by starting to enter the characters.

   Status: show only documents that have the selected status *

   Year: show only documents assigned to the selected year

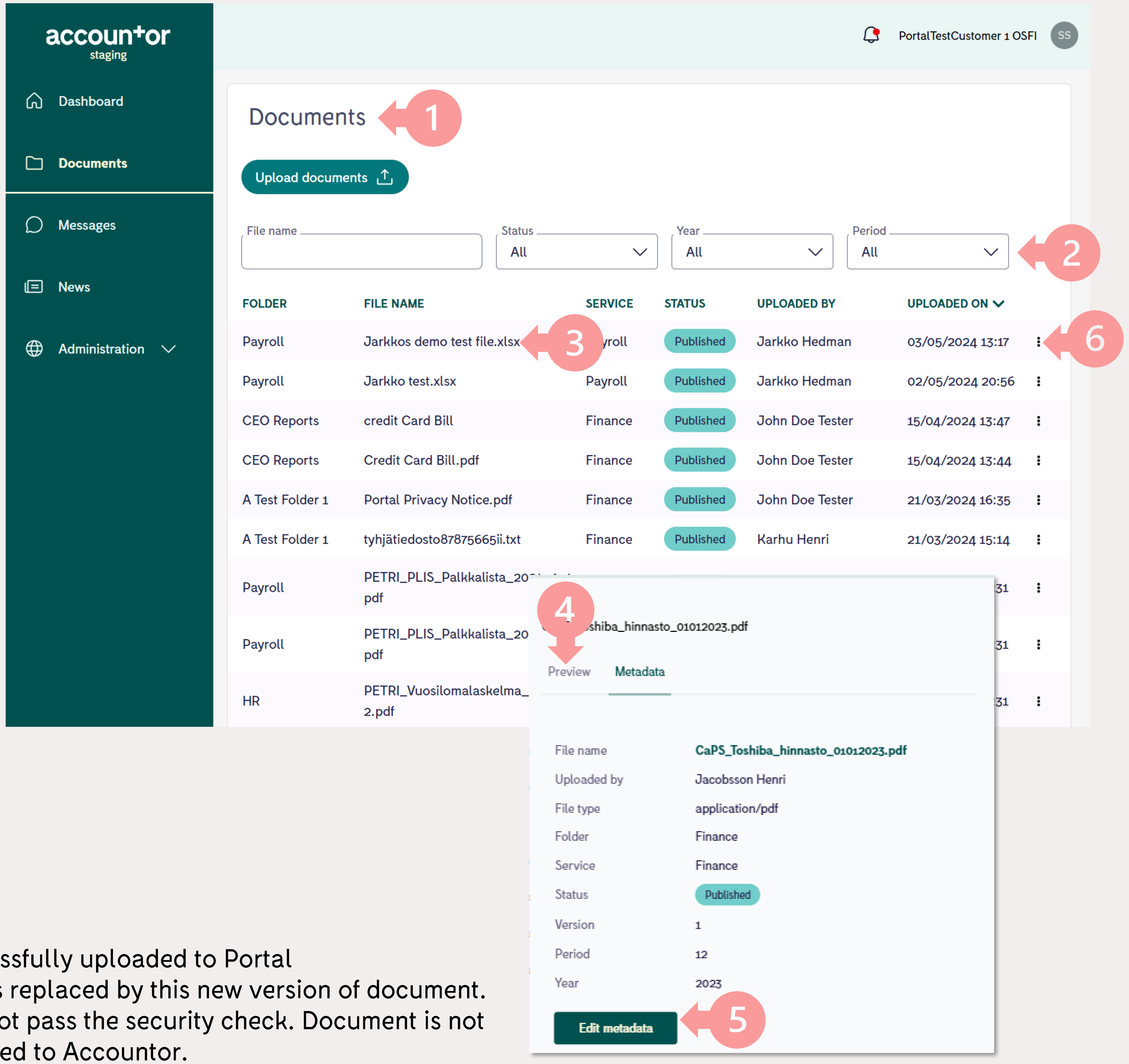
   Period: show only documents assigned to the selected period

3. **Show more information** and **preview** the contents by clicking the name of the document.

4. **Preview** the document by clicking the Preview tab. Close the preview by clicking outside the preview window.

5. Edit document details, **if you need to change the document's name or move it to another folder, year or period.**

6. **Download** the document to your local device by opening the context menu of the document and select Download.



* **Document status options**

Published: Document is successfully uploaded to Portal

Updated: Existing document is replaced by this new version of document.

Quarantined: Document did not pass the security check. Document is not accessible, and it's not delivered to Accountor.

MESSAGING

If you want to contact your Accountor service contact person, you can do it from the client portal. Your message will be delivered to the person who takes care of your matter.

When contacting Accountor, please **do not include highly sensitive personal data** in the messages. We will ask the details, if needed.

If you need to provide us documents, please see page 7 for uploading documents. It is possible to provide a message to us with a document upload.

1. **Select a subject** for your message. This will affect to who will receive your message at Accountor end.

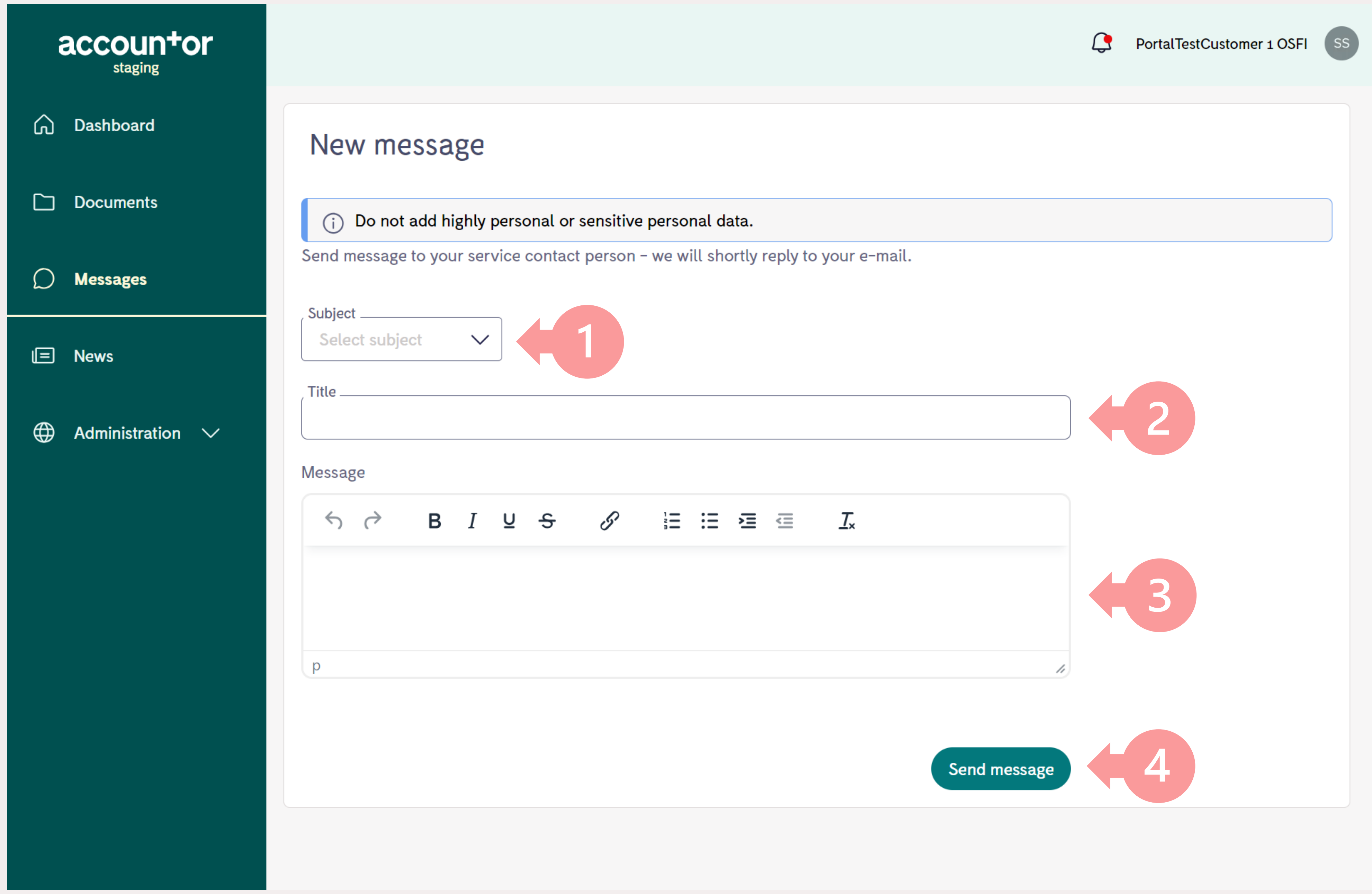
   You can access Payroll, Accounting and HR service contact persons.

   If you need help with the client portal, it's also possible to send your enquiry by choosing "Portal support" from Subject dropdown menu.

2. **Write a short title** about your concern. This will help us to arrange resolution to you as soon as possible.

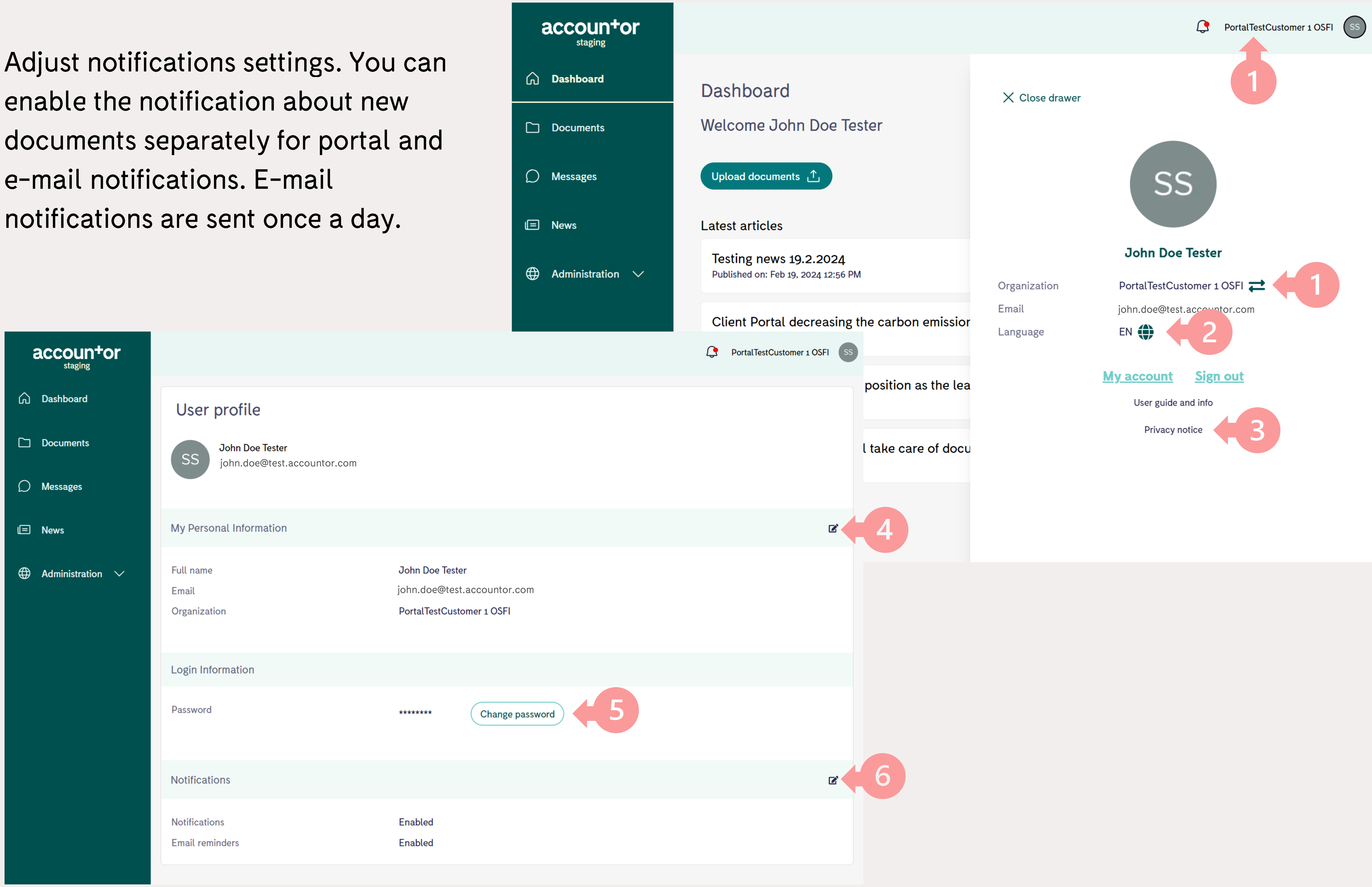
3. **Write a detailed message** about your concern. Please note that you cannot add attachments. If you need to upload documents to the portal, use the Documents functionality.

4. **Send the message** by clicking here. Your message will be delivered immediately to Accountor, and you will get reply to your e-mail.



USER MENU

1. Organisation selection. If you do have access to multiple organisations, you can switch between organisations by clicking the organisation name.
2. Language setting. You can set the language for portal. This setting is personal and affects to only your account.
3. Privacy notice. View the portal privacy notice and cookie information.
4. User's first and last name. You can edit, how your name is displayed in portal. Note that you cannot edit your e-mail address.
5. Change your password. It is recommended to change the password regularly.
6. Adjust notifications settings. You can enable the notification about new documents separately for portal and e-mail notifications. E-mail notifications are sent once a day.



Client admin instructions

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ADDING AND REMOVING USERS

1. To begin adding new users, select the **Administration** function from main menu, and click **Organizations**.

   Note: The Users link is for future functions. It displays the same user list, as in Organisations view.

2. You will see the list of currently added employees. Click **Add user** to add a new user.

3. Fill in the user's **e-mail** address and click **Continue**.

4. Fill in users- **first and last names** and click **Add user**.

   The new user will receive a welcome e-mail message with instructions to activate the account.

After adding the user, remember to add necessary folder permissions to user, so that the user can access the folders that are needed. (See next page)

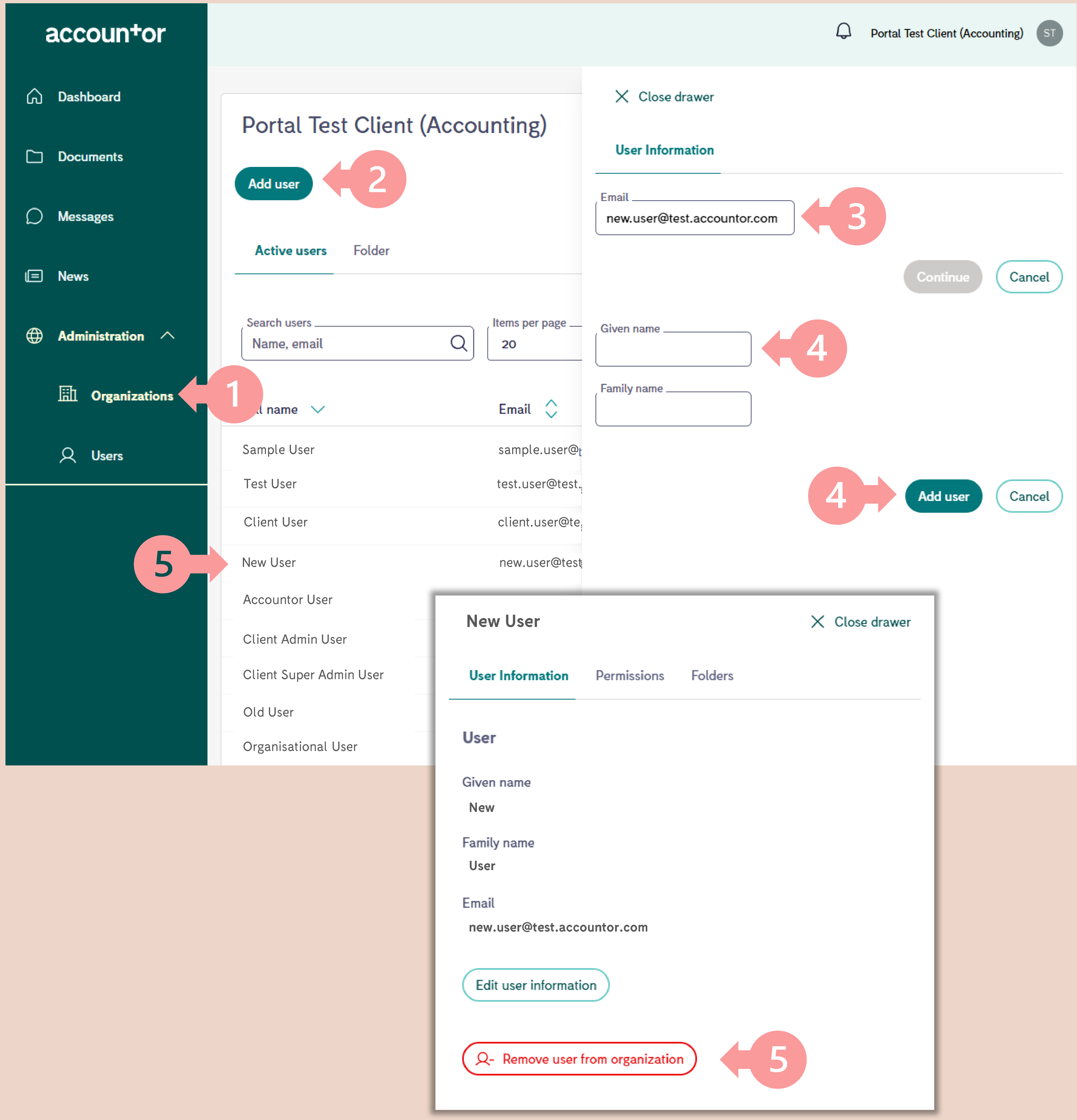
5. **To remove the user** access, click the desired user from the organisation user list. A side panel will open displaying users' details.

   Click **Remove user from organisation** button.

   A confirmation dialog window appears. If you confirm the user removal the user will be removed immediately.

   User removal does not affect to documents nor folders.

   User removal cannot be reverted.



SETTING FOLDER PERMISSIONS TO USERS

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Users need permissions to at least one folder, so that they can upload material to portal, and browse existing material.

Folder creation and removal is maintained by Accountor, but client admin users can maintain the permissions to the folders.

User can only see accessible folders in folder selection dropdown menu, when uploading a document
(page 7).

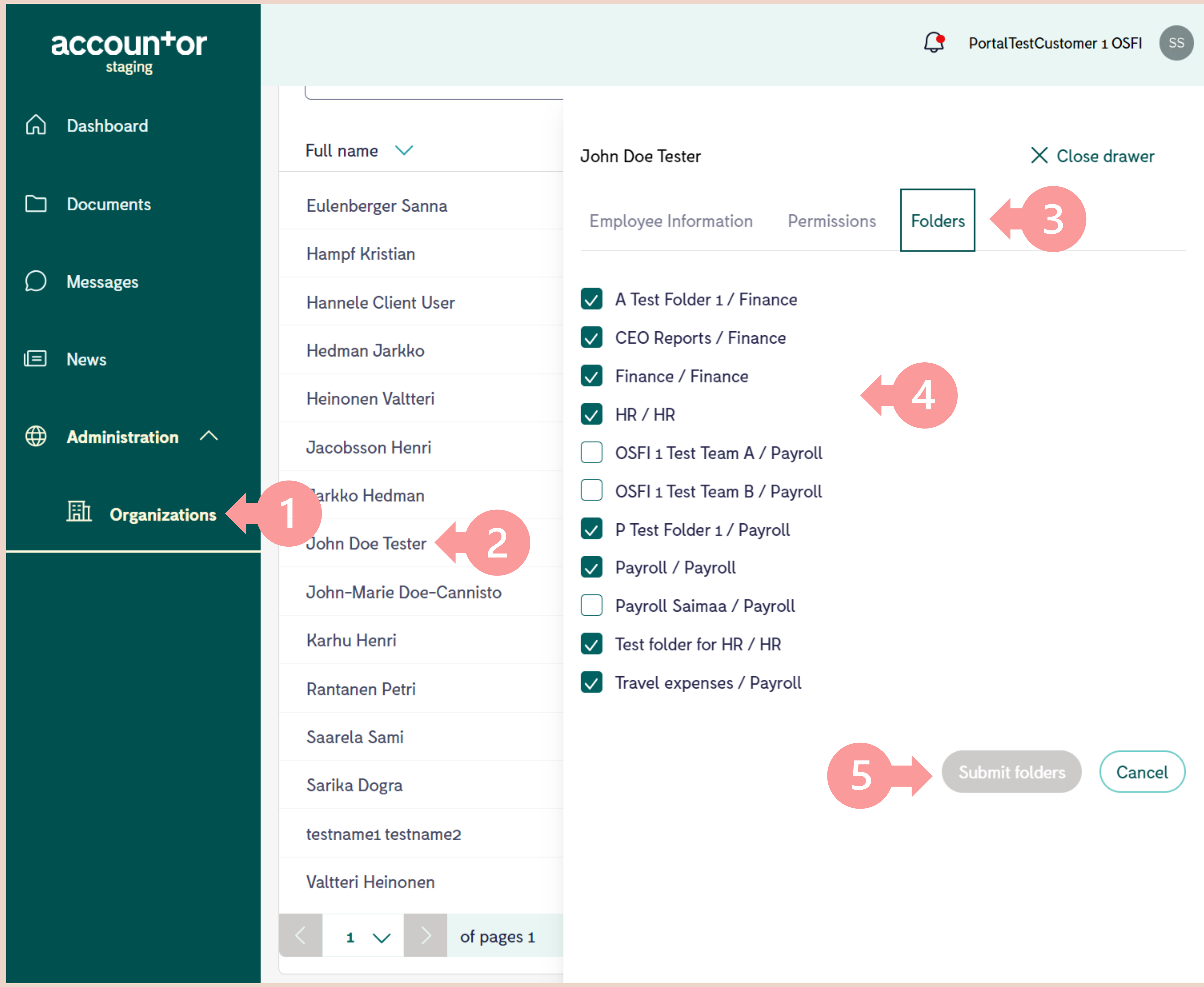
1 To start defining the folder permissions to user in current organisation, click the **Administration** from main menu and select **Organisations**.

2 A list of organisation's user will appear. **Select the user** by clicking the username on the list. User information panel will open.

3 Click the **Folders** tab to open the folder permission settings. A list of folders created for your organisation will appear. Click **Manage folders** button to start setting the permissions.

4 In folder list, you **click the checkbox to give permissions** to that folder. Unchecking the box will remove the permissions.

5 Save the permissions by clicking **Submit folders**. The user will now have access to folders you checked. This may require the user to log out and log back in once after permissions are set.



The folder names do have a following structure:

Folder name / service

Service information (finance, Payroll or HR) is specific to each folder. It tells, which department at Accountor side will have access to that folder. For example, Payroll department cannot access the folders, that do have Finance as service. As client admin user, you can maintain folder permissions for users of your organisation.