





Overview

Document Manager integrates an intuitive platform for a "less paper office" by making it easy to store and retrieve electronic files. To further reduce paper handling in your practice, there is also an add-on module that makes it a breeze for you and your clients to share files and digitally sign documents.

Secure, convenient and professional

Client Portal is a very easy to use, cloud based, module that allows Document Manager users and their clients to securely download, sign-off and upload data files and reports, online at any time.

Self service saves time and money

Allowing your clients to access relevant files, securely online, eliminates the need for time-consuming, unsecure email processes and the expense of post. In addition to providing clients with the ability to "self service," the in-built authenticated digital signing function has the capability to significantly speedup the completion of your compliance jobs.

Easy to keep track

Via the online portal or printed reports, users will be able to clearly see all documents that have been created, signed off and those that still require signed approvals. Additionally, automatic email notifications are sent to notify clients and HandiSoft users when files are uploaded or sent.

Authenticated Digital Signatures

A Client Portal login must be created for each person so that the system can clearly identify the individual who signed the document. For "Non-Individual" Clients, multiple Portal Logins can be created so that each individual associated with the entity can have their own Portal area to sign documents.

The application ensures that all documents are read before they can be signed, by requiring users to download a copy of the document and prompting them to read it first. After being digitally signed, it is then date-and-time stamped and becomes "read only" eliminating the possibility of changes being made subsequently. Furthermore, after being signed, documents cannot be renamed, overwritten or deleted.

Key features & benefits:

- Integrates seamlessly with Document Manager and your HandiSoft central client database.
- Real time client service. Improves client relationships by enabling you to work efficiently and professionally with your
- · Self Service. Provides clients with secure access to documents at any time.
- Save time. Significantly reduces document handling and processing times (instead of email or post).
- Saves money through time savings and by not having to post documents via Australia Post.
- Share securely. Highly secure with 128 bit encryption and industry best practice standards with authenticated digital signatures.
- Easy to use simply drag-and-drop files in Document Manager.
- Branded portal. Your clients see your logo on their portal.
- Excellent search facility. Easily find files using keywords, author, comment or document text.
- Automatic notifications when you upload a file to a client's secure area and when they send you a file.







Create multiple Portal Logins per client

Document Manager will display a folder for each new Portal Login.

Document listing screen

A Portal User receives an email advising them when a document has been placed into their online Portal area. Upon logging into the Client Portal your clients will view each file that has been stored in their personalised Client Portal.

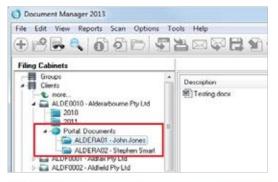
Requesting Digital Signatures

You can easily request that your clients sign-off files that have been stored in Document Manager using the new Request Signature button on the Document Details screen.

The New Signature Request screen will display the location of the selected document within Document Manager. A comment can also be entered and will appear on the Document Details page on the Portal.

After clicking the Save button, a copy of the selected file in Document Manager is sent to the Client Portal area for each specified Portal Login.

An email will also be sent to the Portal User associated with each specified Portal Login advising them that they have received a document, together with instructions on how to digitally sign the document.









ABOUT SAGE

Sage Australia, is a subsidiary of The Sage Group plc and has offices throughout Australia and New Zealand, and more than 25 years' experience in both local markets.

We provide small and medium sized organisations, and mid-market companies with a range of easy-to-use, secure and efficient business management software and services - from small business online accounting (Sage One), accounting practice management (Sage HandiSoft), payroll and HR (Sage MicrOpay), to enterprise resource planning and customer relationship management (Sage Business Solutions).

Sage energizes the success of businesses and their communities around the world through the use of smart technology and the imagination of our people. Sage has reimagined business and brings energy, experience and technology to inspire our customers to fulfil their dreams.

We work with a thriving community of entrepreneurs, business owners, tradespeople, accountants, partners and developers who drive the global economy. Sage is a FTSE 100 company with 14,000 employees in 24 countries.