

Welcome to the APM Portal

The APM Portal is a mobile-friendly online platform that allows you to digitally review, comment on, and sign documents at the click of a button.

It is also a secure storage centre for copies of Tax Returns, Financial Statements and any other documents you may require from time to time, all available 24 hours a day.

The APM Portal will streamline the Year End process and eliminates the need to print, sign, scan and return documents to our office.

Please follow these instructions to help you setup your login and use the portal. If you have any queries or difficulties in using the portal please contact us.

We hope you enjoy using the portal,

The team at APM

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Signing Up

Setting up your Portal Account:

We will send you an invitation email asking to connect to the portal.

Note: The email (mail@apps.myob.com) does not come from APM and may go to your junk folder.

Click on 'Sign in to your portal'

From: APM <mail@apps.myob.com>
To: APM customer
17 September 2021

Please sign in to collaborate with APM Advisors Accountants

Hi Customer
We've set up a secure online portal for you that will make collaborating on important documents and accounting tasks easier.
To access the portal, sign in below.
Thanks
APM Advisors Accountants

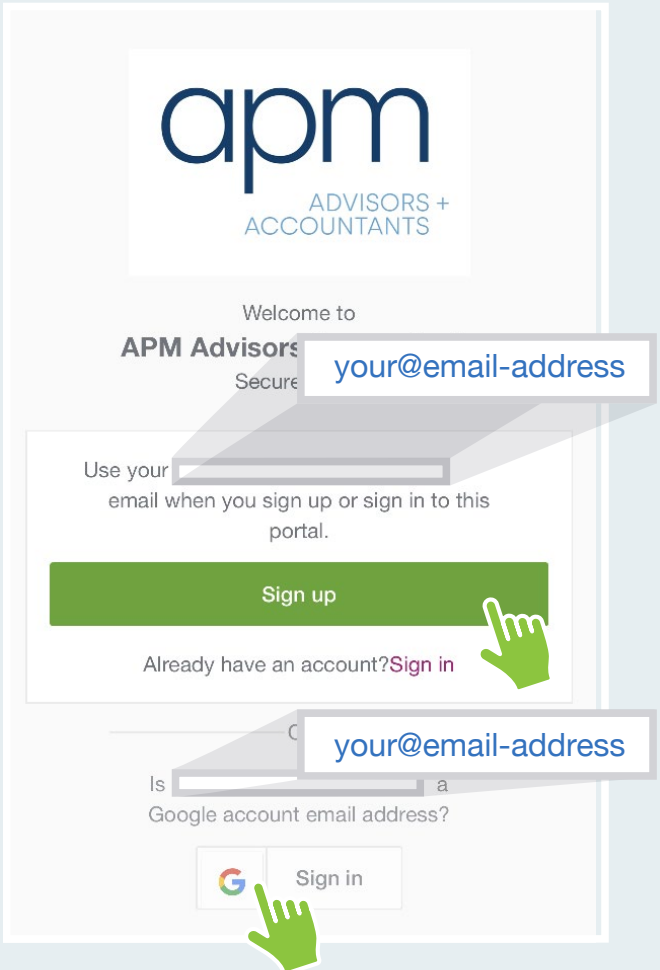
You have been invited with the following email address:
Customer@homeemail.com.au
Not the right email address?
Please call us at APM Advisors Accountants and we will sort it out.

Sign in to your portal

This will take you to a web browser where you can either:

1. Sign up for the portal

Please ensure you **enter the email address we sent the invitation to.**

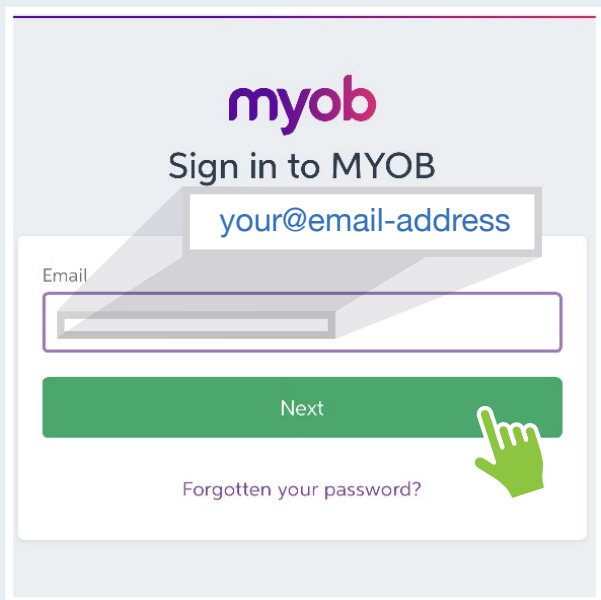


If you have a Gmail address, you can automatically login by **clicking on the 'G' icon** and use the same details for your Gmail account.

2. Sign into your existing portal*

(if you already have a login for existing MYOB products like Essentials)

Please ensure you *enter the email address we sent the invitation to.*

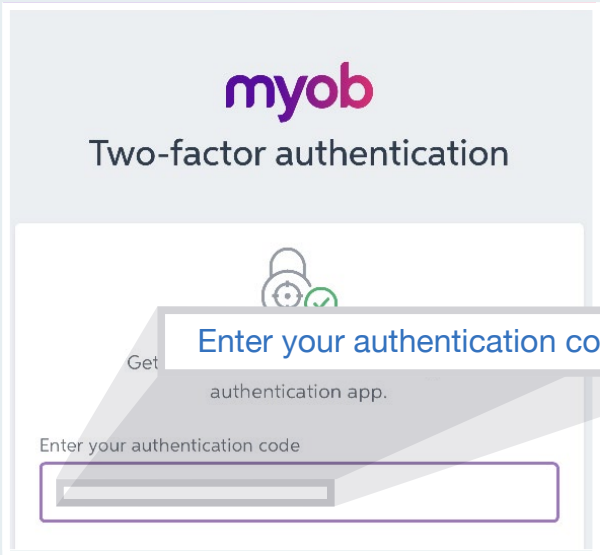


***Note:** If you already have a login for other MYOB products, such as Essentials or AccountRight, you can use the same login details - no need to setup a new login for the portal, we can set you up with the same email address and you login with the same credentials as your MYOB product.

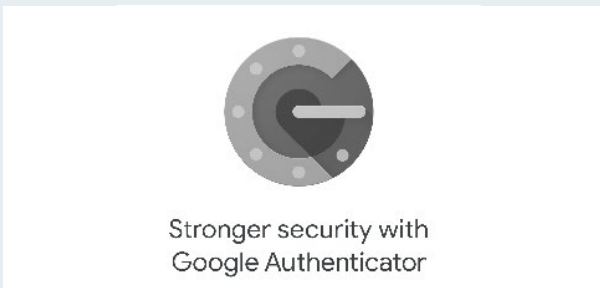
No need to have multiple passwords.

Note: MYOB two-factor authentication

If you are logging through MYOB you may be asked to enter an authentication code.



Use an app like Google Authenticator to generate a code for your account.



Need Help? Please contact Elisa:

e estocco@apmaa.com.au

t (03) 8400 6500

Once your password is entered, the screen will go back to the home page and the portal will ask to '**Sign In**' to ensure it has been setup correctly.



Welcome to
APM Advisors Accountants
Secure Portal

Sign in using your MYOB account.

Sign in



Don't have an account? [Sign up](#)

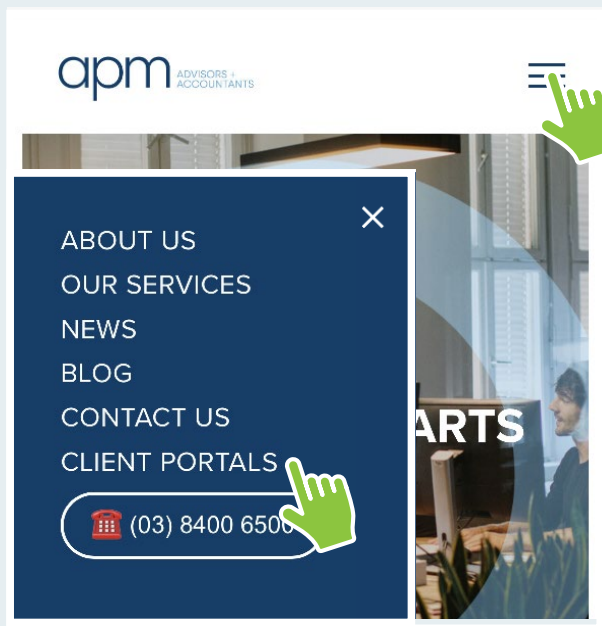
Or



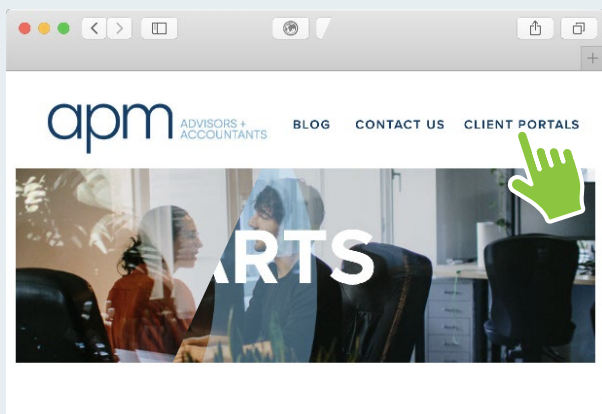
Sign in

You have now signed in/up to the portal. If you want to access the portal please go to our website and **click 'Client Portals'**

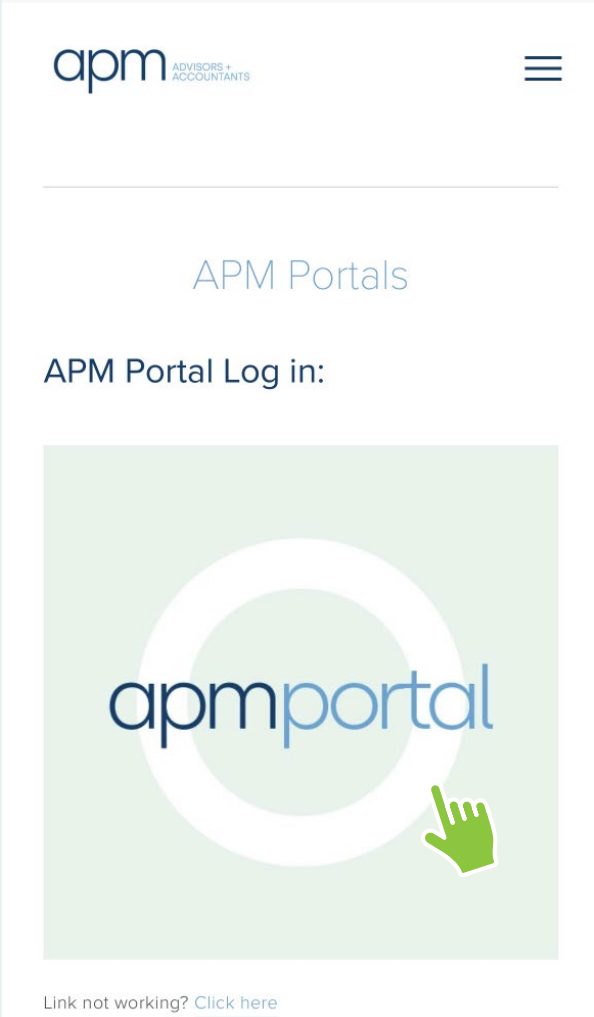
On mobiles:



On desktops:



Click on 'APM Portal'



The screenshot shows the top of the APM website. In the top left corner is the logo for 'apm ADVISORS + ACCOUNTANTS'. In the top right corner is a hamburger menu icon. Below the header is a horizontal line. The main heading is 'APM Portals'. Underneath this is the text 'APM Portal Log in:'. Below that is a large green square containing a white circle with the text 'apmportal' inside it. A green hand cursor icon is pointing at the bottom right of the circle. At the bottom of the green square, there is a link: 'Link not working? [Click here](#)'.

Approving documents

The portal allows for digital signatures to be available on tax returns, activity statements and other documents legally allowed to have a digital signature.

Digital Signature:

A line is placed at the bottom of each page of a document you mark 'approved' in the portal; listing your full name, the date and time of signature, including the words; "This document was digitally signed by...." e.g.

	225,733.00
Less:	
Total expenses	207,543.00
Less: Non-deductible expenses	3,781.00
	203,762.00
Plus: Other deductible expenses	15,794.00
Losses deducted	2,231.00
	221,787.00
Taxable Income	3,946.00
Tax on Taxable Income	
Tax on Other Business Income	1,085.15
	1,085.15
Less Non-refundable non-carry forward tax offsets	-
	-
Subtotal 1 T2	1,085.15
Less Non-refundable carry forward tax offsets	-
	-
Subtotal 2 T3	1,085.15
Less Refundable tax offsets	-
	-

This document was digitally signed by

AMOUNT DUE TO CREDITORS
2021 PAYG INCOME
Instalment R

Please note that this is our estimate of your PAYGI liability. Actual amounts payable will be determined by the Australian Taxation Office and may differ from this estimate.

APM Advisors + Accountants

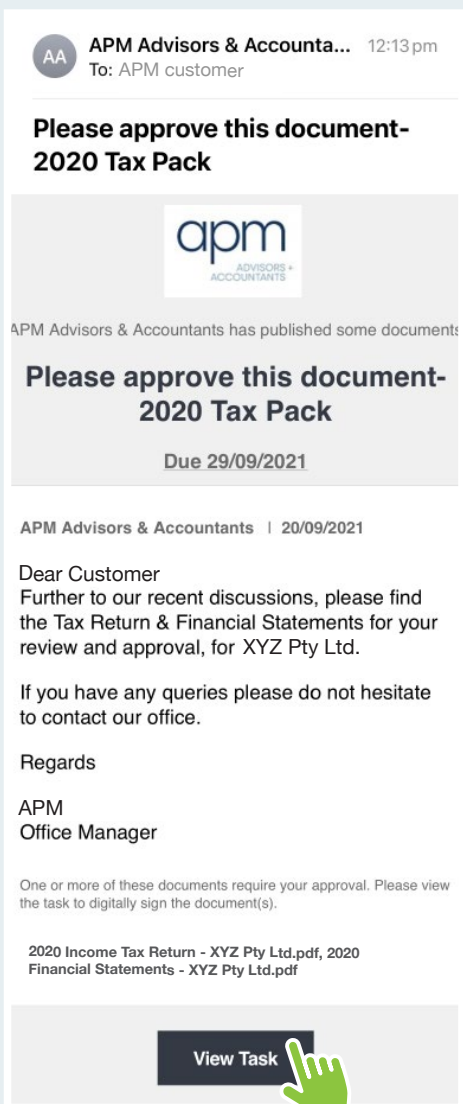
This document was digitally signed by [redacted] at 20/09/2021 12:46:43pm +10:00 GMT

Following are the instructions for you to access and digitally sign documents using the portal.

Digitally approving documents:


You will receive an email notifying you that there is a document on the APM portal for your approval.

Click on 'View Task'



AA APM Advisors & Accountants... 12:13 pm
To: APM customer

**Please approve this document-
2020 Tax Pack**



APM Advisors & Accountants has published some documents

**Please approve this document-
2020 Tax Pack**

Due 29/09/2021

APM Advisors & Accountants | 20/09/2021

Dear Customer
Further to our recent discussions, please find the Tax Return & Financial Statements for your review and approval, for XYZ Pty Ltd.

If you have any queries please do not hesitate to contact our office.


Regards

APM
Office Manager

One or more of these documents require your approval. Please view the task to digitally sign the document(s).

2020 Income Tax Return - XYZ Pty Ltd.pdf, 2020
Financial Statements - XYZ Pty Ltd.pdf

View Task



Sign into your portal account, the documents awaiting your approval will be displayed.

Click the PDF hyperlink to review the document and check the contents carefully.

Please approve this document- 2020 Tax Pack

Due: Wed 29 Sep 2021



Dear [Name]

Further to our recent discussions, please find the Tax Return & Financial Statements for your review and approval, for [Company] Pty Ltd.

If you have any queries please do not hesitate to contact our office.

Regards

[Signature]

Office Manager



2020 Income Tax Return - [Company] Pty Ltd.pdf



2020 Financial Statements- [Company] Pty Ltd.pdf



You'll need to open these documents before you approve or reject them

Reject

Approve

ABN

- 27 Was the aggregate amount of the transactions or dealings with international related parties (including the property transferred or the balance outstanding on any loans) greater than \$2 million? **Y** **N**

- 28 Overseas interests
Did you have overseas branch operations or a direct or indirect interest in a foreign trust, foreign company, controlled foreign entity or transferor trust? **Z** **N**

- 29 Thin capitalisation
Did the thin capitalisation provisions affect you? **O** **N**

- 30 Transactions with specified countries
Did you directly or indirectly send to, or receive from, one of the countries specified in the instructions, any funds or property, OR Do you have the ability or expectation to control, whether directly or indirectly, the disposition of any funds, property, assets or investments located in, or located elsewhere but controlled or managed from one of those countries? **I** **N**

Calculation statement

		*Taxable or net income	A	3946
		*Tax on taxable/net income	T1	1085.15
		R&D recoupment tax	M	
		Gross tax	B	1085.15
		Non-refundable non-carry forward tax offsets	C	
		Subtotal 1	T2	1085.15
		Non-refundable carry forward tax offsets	D	
		Subtotal 2	T3	1085.15
		Refundable tax offsets	E	
		Subtotal 3	T4	1085.15
		Franking deficit tax offset	F	
		*TAX PAYABLE	T5	1085.15
		Section 102AAM interest charge	G	
		Eligible credits (H1+H2+H3+H4+H5+H7+H8)	H	
		*Tax offset refunds	I	0.00
		PAYG instalments raised	K	
		AMOUNT DUE	S	1085.15

Tax agent's declaration: We, APM Advisors + Accountants, declare that this tax return has been prepared in accordance with information provided by the taxpayer, that the taxpayer has given us a declaration stating that the information provided to us is true and correct and that the taxpayer has authorised us to lodge this tax return.

Agent's signature Date


Agent's telephone 03 8400 6500 Client's reference

Contact name Manuel Imbardelli Agent's reference no 25992551




When you have finished your review, please **click the back arrow on your web browser.**

Approve or Reject documents



2020 Financial Statements-
Pty Ltd.pdf



Reject Approve

Note: Before accepting or rejecting a document you can request to see any additional or supporting documentation. To do so *add a comment* into the text box and *press send*. We will receive this request will be able to action accordingly.

Reject Approve


Task created:	Due by:	Status:	Task code:
Today	Wed 29 Sep 2021	Created	TSK00000010

APM Advisors & Accountants created the task on 20/09/2021 at 12:12

Comment...

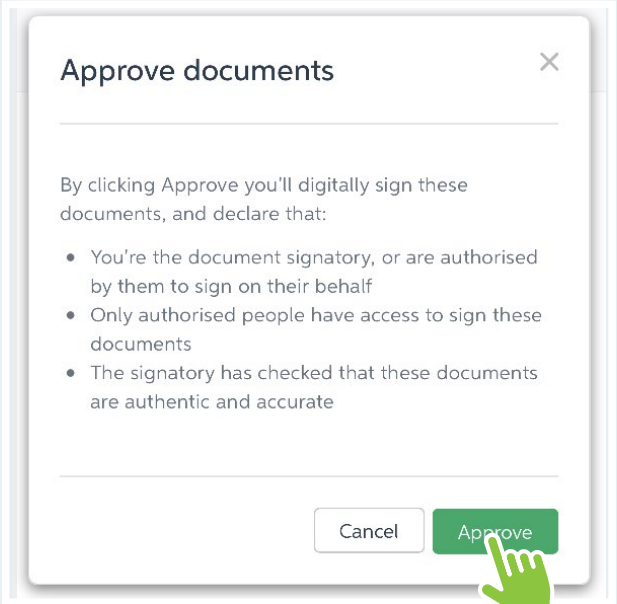
Type in a comment...

+ Add attachment Add comment

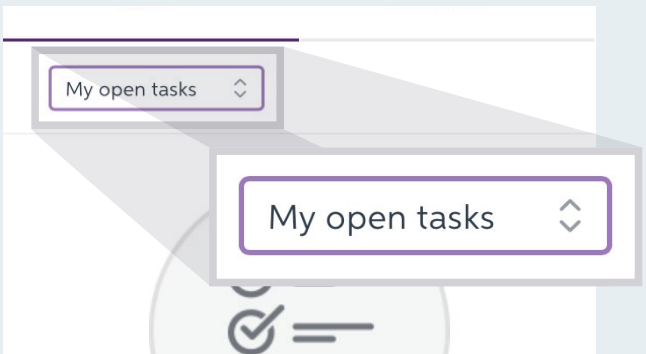


Approve – means you agree with the document contents and will digitally sign it (no more need for actual signatures)

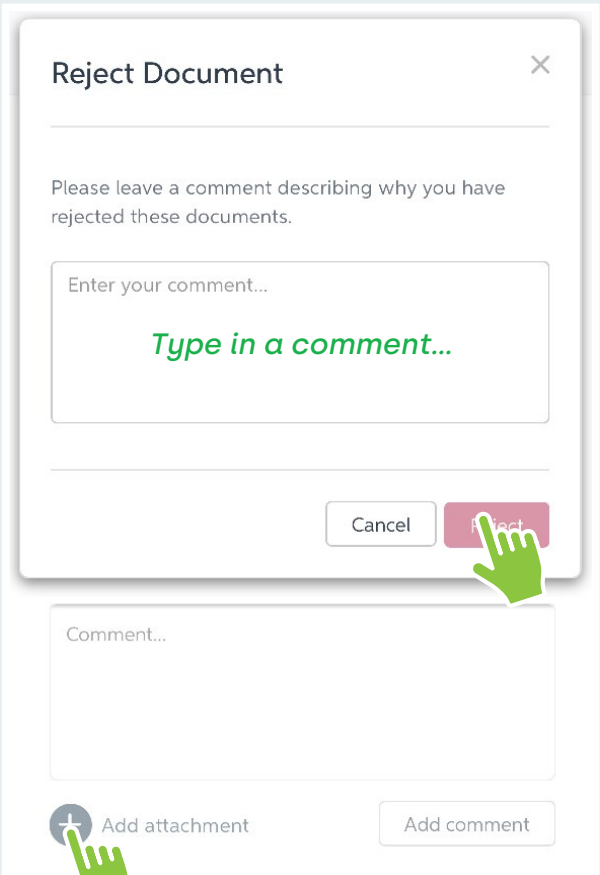
Click 'Approve,' a pop up window will appear asking you to confirm your approval.



The approved document will be removed from your open task list in the portal.

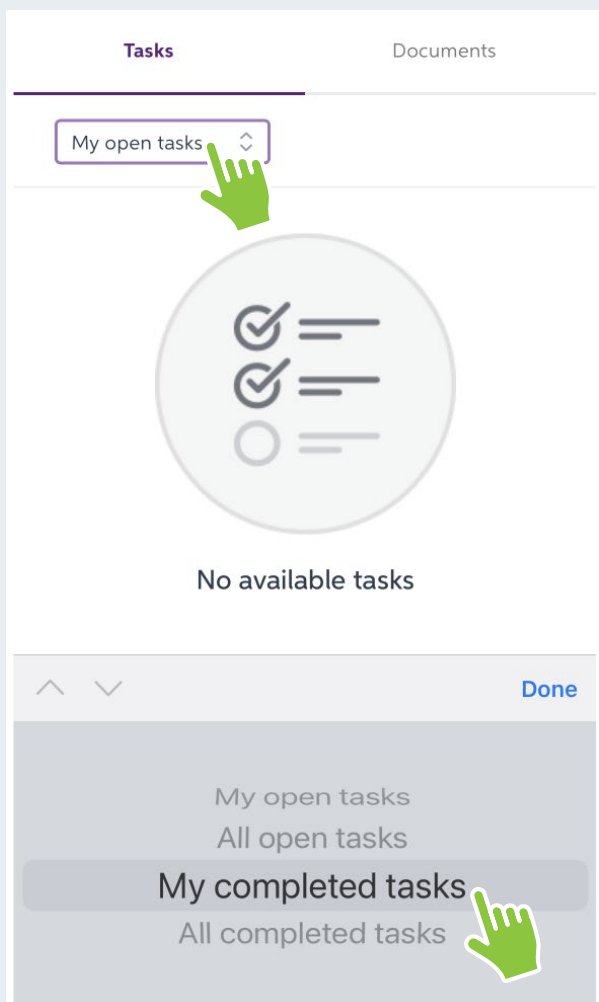


Reject – means you have queries on the contents of documents and will not digitally sign it. Please ensure when you reject a document you **add a comment** in the text box and send it to us explaining why you are rejecting the document.

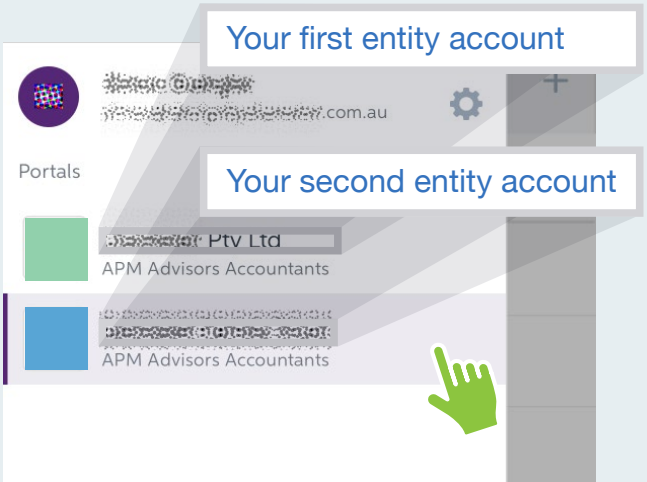


Note: Attachments like outstanding bank statements and rental expenses for your tax return can also be added to comments. **Click 'Add attachment'** to send documents to APM.

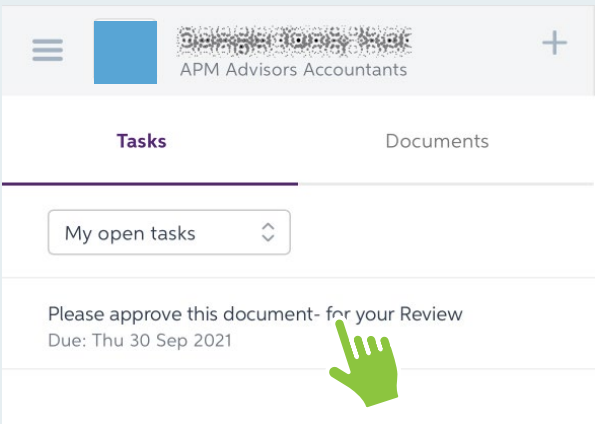
You can change the drop down box where it states **'my open tasks'** and change it to **'completed tasks'** where it will list your completed documents and show you the date and time on that you approved the document.



If you are a signatory on tax returns other than your own, for example a Family Trust or Company, you will receive notification emails for each tax return. Once you log into your portal, you will see each entity you are linked to on the left hand side of your home page:



You can **click on each entity** to view documents or tasks at any time. All your documents will all be on the one portal.



Note: if you are not the only signatory for documents, say your business partner also needs to sign, they too will get a copy of the same document and once you both approve the document, both digital signatures will appear on the 1 copy of the document.

Need Help? Please contact Elisa:

e estocco@apmaa.com.au

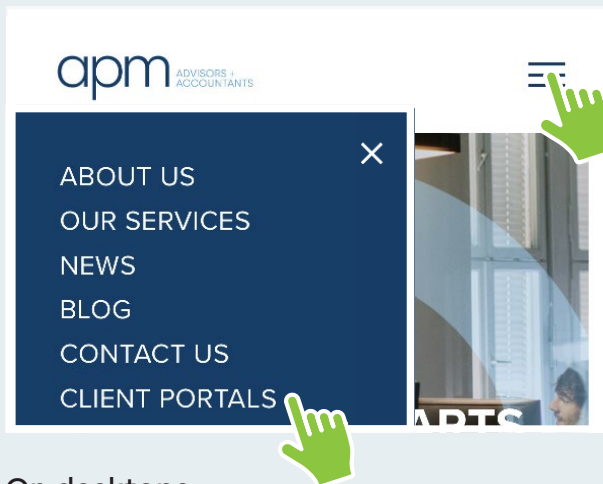
t (03) 8400 6500

Accessing saved documents

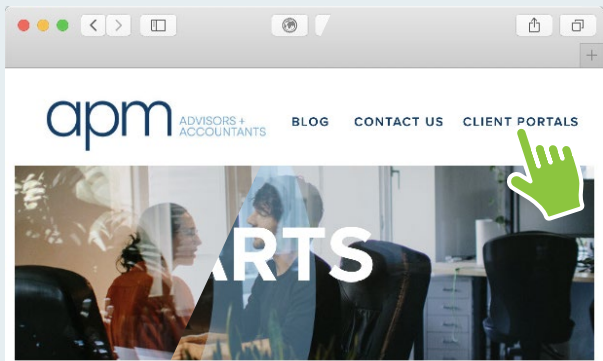
You can access documents uploaded to the portal at any time, including Tax returns, financial statements or Notice of Assessments for a bank or other financial institution.

To access the portal please go to our website and **click 'Client Portals'**

On mobiles:



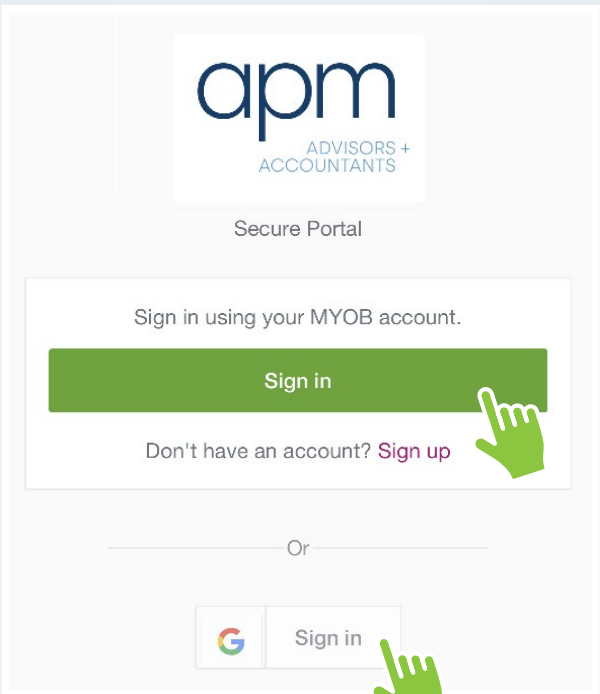
On desktops:



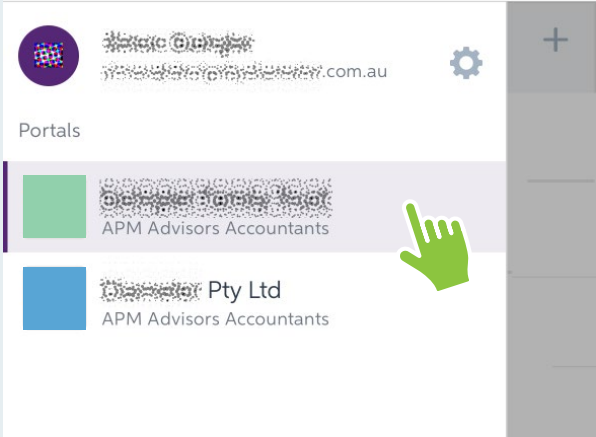
Click on 'APM Portal'



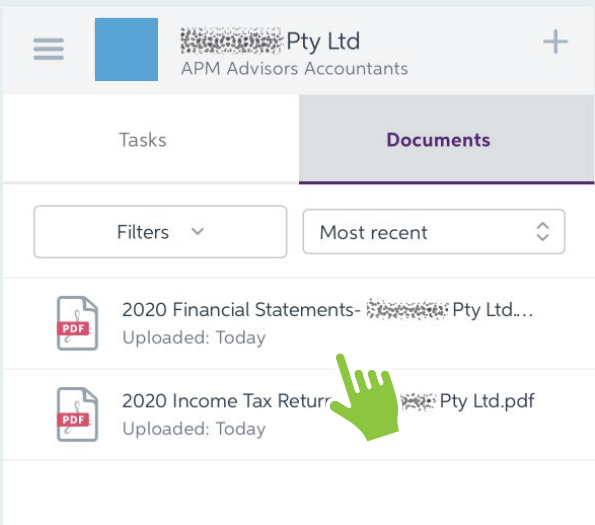
On the portal login page **Click on 'Sign In' or the 'G' Symbol** with your correct email and password.



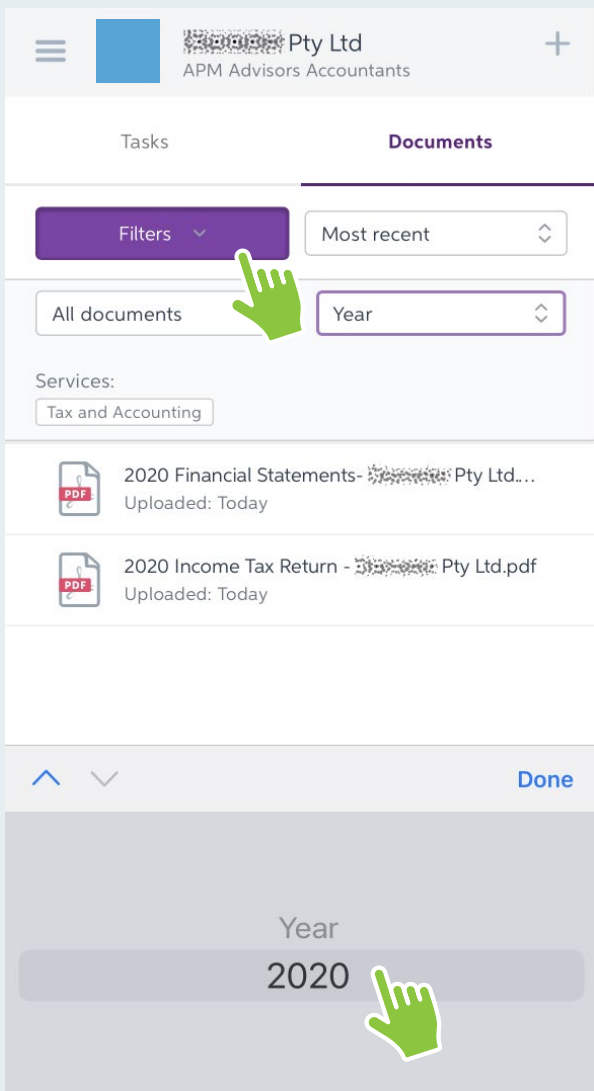
The portal will open to the home page where any entities you are linked to will be listed on the left-hand side. **Click on the relevant entity/individual** then on Documents tab at the top.



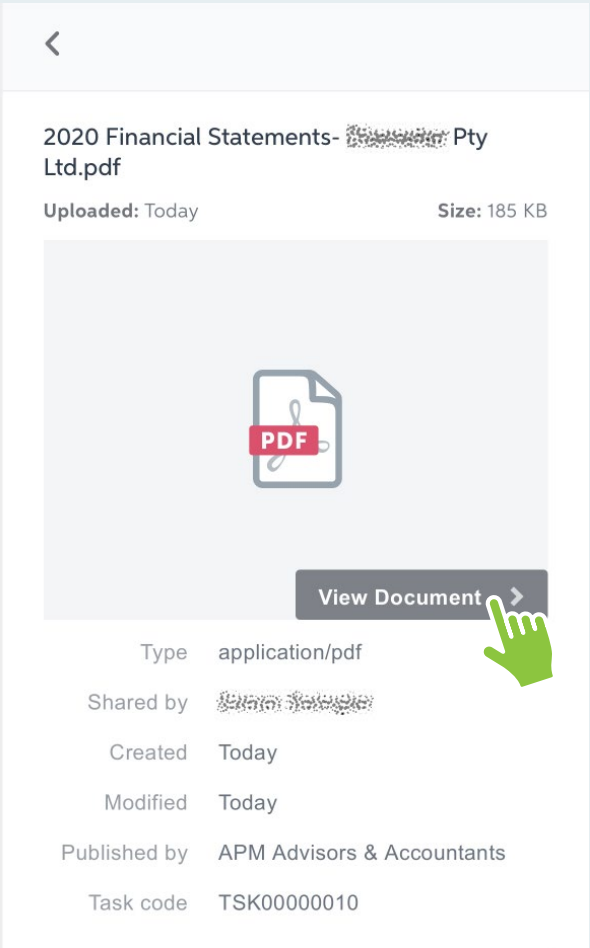
This will show the list of documents available for that entity on the portal - tax returns, assessments etc.



You can filter the documents for a specific tax year by **clicking on 'Filters' option** above the list of documents and select the Year required. There are also other filters you can use to refine the list of documents such as the Services- Tax and Accounting or Correspondence.




Click once on the relevant document, then click on **'View Document'**. The document will then open and you can download it and save to your PC. Repeat for any other documents you require copies of.



<

2020 Financial Statements- [redacted] Pty Ltd.pdf

Uploaded: Today **Size:** 185 KB



View Document >

Type application/pdf

Shared by [redacted]

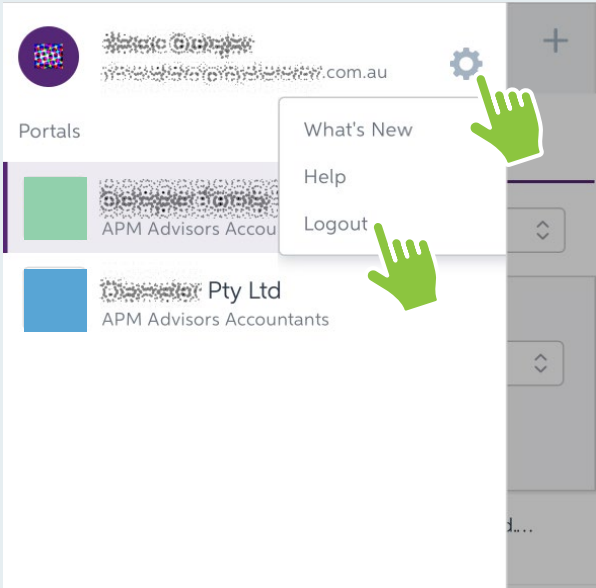
Created Today

Modified Today

Published by APM Advisors & Accountants

Task code TSK00000010

To log out of the portal, click on the wheel or cog on the right of your name at the top of the screen then select '**Logout**'



If there are any documents you require access to and are not listed, please advise our team and we will upload it for you as required.

Need Help? Please contact Elisa:

e estocco@apmaa.com.au

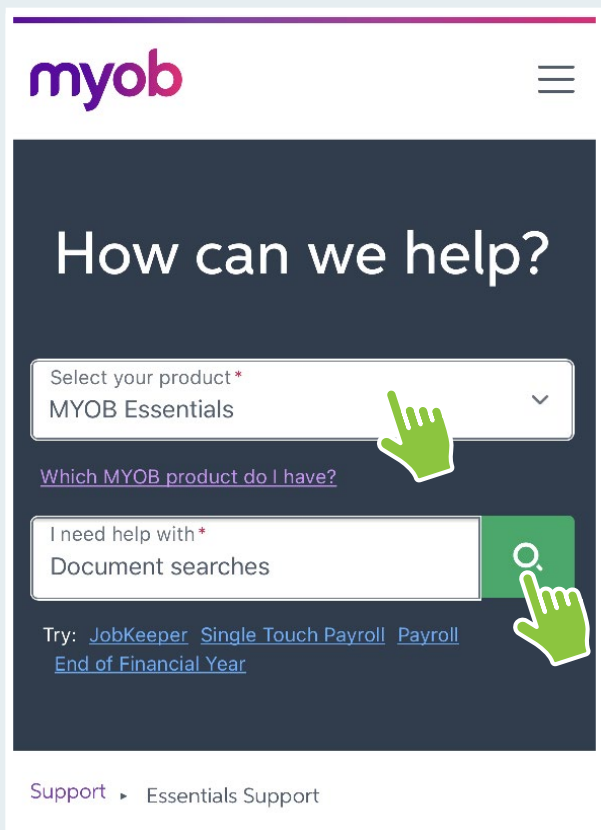
t (03) 8400 6500

MYOB Help

MYOB's Help website will answer most of your queries [Visit MYOB Help now.](#)

On MYOB Help, **Select 'MYOB Essentials'** from the 'Select your product' dropdown menu.

Type in your requested query or topic and **click the 'Search' button.**



Technical specifications

▼ Before you start

Your portal can be used on any computer or mobile device with access to the internet. Use the latest version of the following supported browsers to ensure that your portal displays and performs correctly:

- Firefox
- Google Chrome
- Internet Explorer
- Microsoft Edge
- Safari

Your browser should also have [cookies](#) and [JavaScript](#) enabled.

Screen resolutions from (640px x 960px) to (2560px x 1440px) are supported.

Contact us

Please contact Elisa:

e estocco@apmaa.com.au

t (03) 8400 6500

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