

Activating and Creating your Account

1. **Activate** your account. Open the email you received and press activate account. You will then be prompted to create a password. Please make sure that it meets the security requirement of being more than 8 characters.



Saward Dawson

< Back

Activate Your Account

Email address

tester@tester.com.au

Choose a password

••••••••

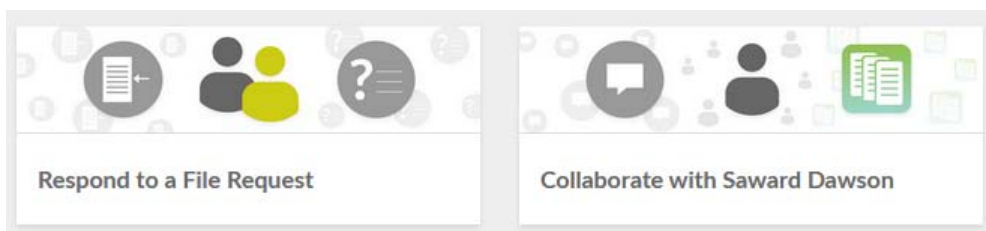
Re-type your chosen password

••••••••

Minimum 8 characters ?

Activate Your Account

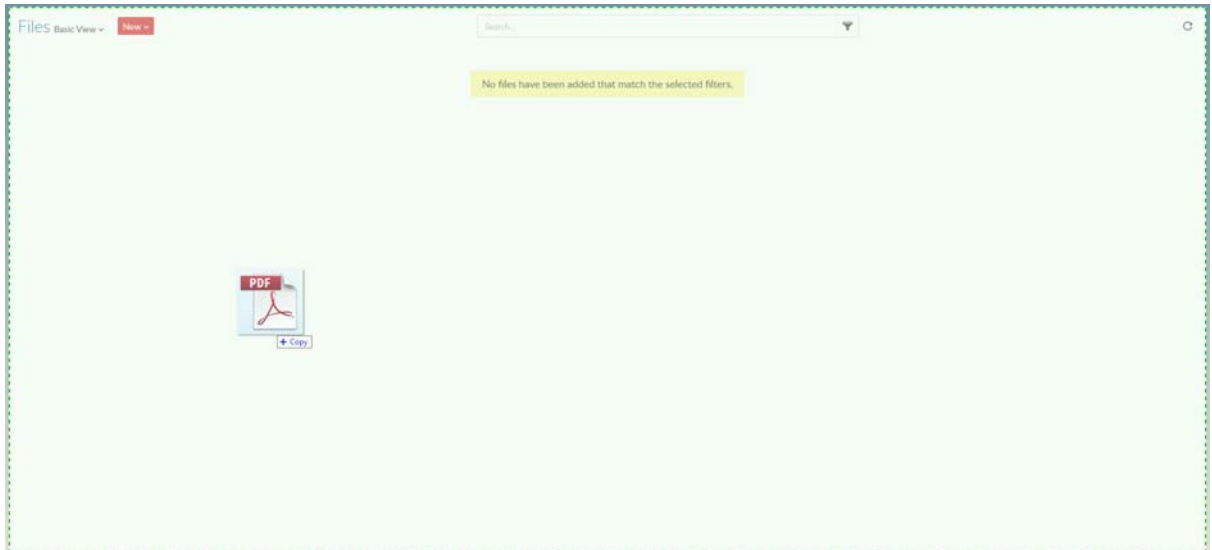
2. Please continue to **sign in** and **read and agree** to the terms of use.
3. Select **“Respond to a File Request”** option and read the overview of what you will be able to do.
Press back and Select **“Collaborate with Saward Dawson”** option and read the overview of what you will be able to do. Once you have read these you can **close** the pop up.



4. You should be directed to the files **homepage** . Go to the top left hand side and select the **menu**. Then select **overview**. This is where you will be able to view your tasks and questions from the auditor.

Uploading files to the auditor

1. If you need to **upload** a file that the auditor has asked you for, please **drag** and **drop** into the files homepage



2. From here you will be able to **download/replace/delete/view** the document as well as **allocate** it to a discussion/task or file request.

Create Task

Subject *

Description

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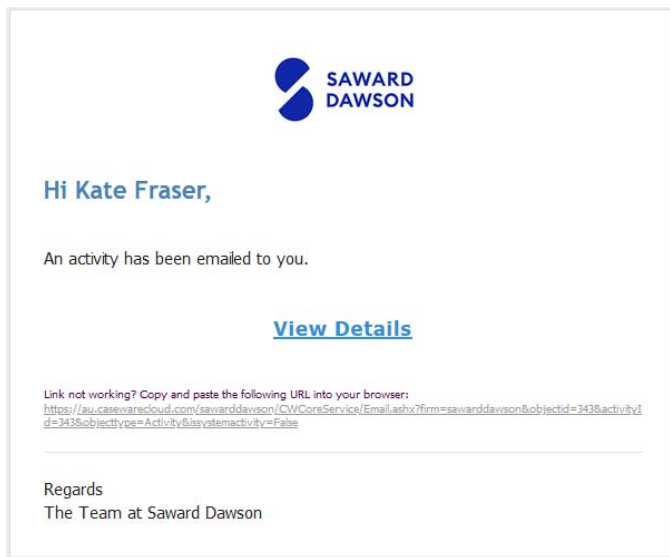
Example Invoice.pdf

Due Date

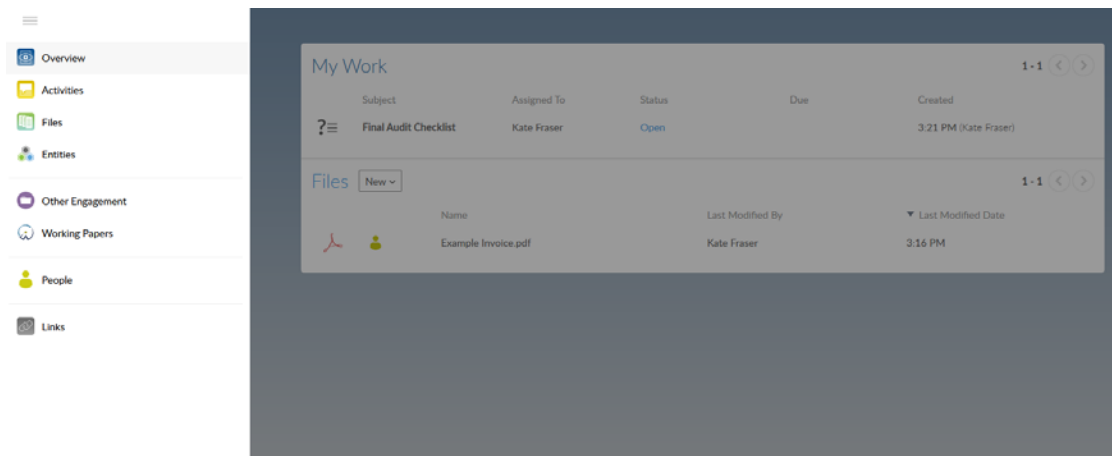
Cancel Post

Responding to a checklist

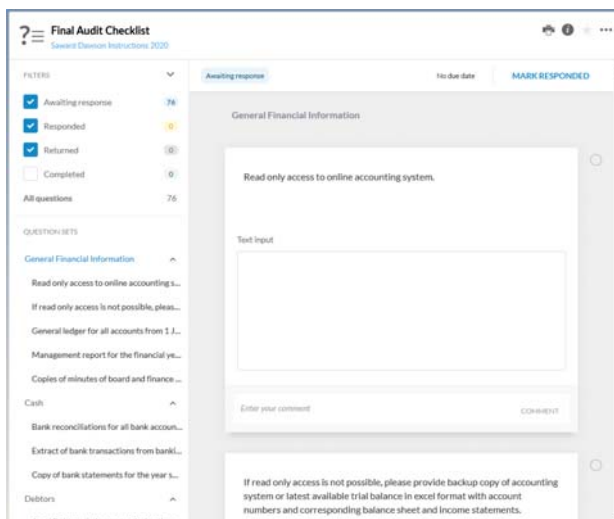
1. If you **receive** the request via **email** it will look like this. Please select view details.



2. Alternatively the request will show on **your homepage**



3. Your request will look like the below, but the lines may differ depending on what documents are required for your audit/review.



- Please **drag and drop** the requested file. If you have any notes to accompany the document please enter a **comment** in the section allocated.

File upload

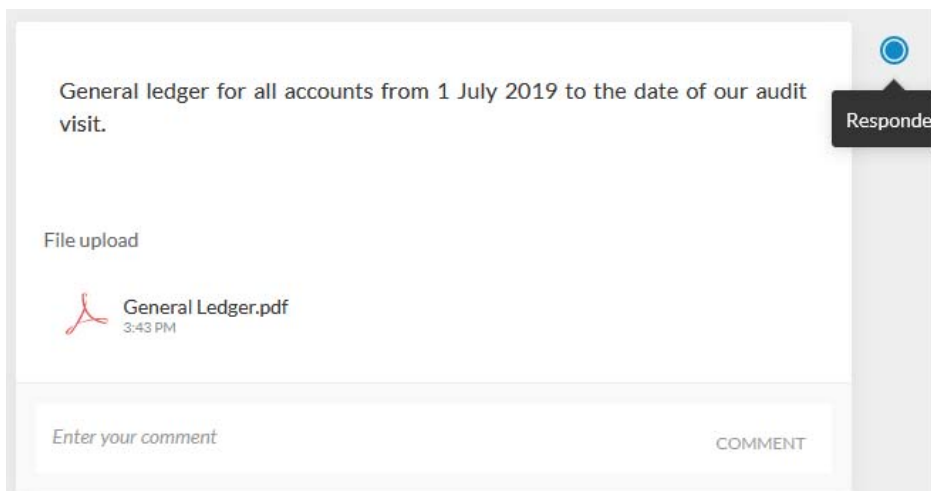
Drag and drop here or click to browse

[COPY FROM CLOUD](#)

Enter your comment


COMMENT

- Once your document is uploaded, press the **circle** on the top right of the to show that you have **responded to the request**.



General ledger for all accounts from 1 July 2019 to the date of our audit visit.

File upload

 General Ledger.pdf
3:43 PM

Enter your comment

COMMENT

Responded

- Once you have **completed** the checklist press the **mark responded** button and an email will automatically be sent to your audit team notifying them that the task is complete.

Awaiting response

No due date

[MARK RESPONDED](#)