

S&A Partners Portal Instructions

Purpose of this new portal:

Greater ease of use for uploading/downloading documents, such as:

1. The portal is easier to view on your phone
2. Email notifications are clearer
3. You can create your own folders when uploading documents
4. You will receive an email notification from us whenever we download your documents
5. We will be using it for sharing the following documents with you:
 - a) T4s/T5s will be uploaded here this year
 - b) Corporate returns will be uploaded here eventually (this is yet to be launched)

**Kindly note:* Your access to our previous portal called 'CCH Portal' has been discontinued.

Logging in:

1. To access your new portal go to <https://portal.snapartners.ca/Login>.

Note: when your portal was created, a welcome email was sent to your email address that included your username (your email address) and a temporary password and this same weblink:

This is what the welcome email looked like:

Subject line: Portal Credentials

Body of the email:

Welcome to S&A Partners web portal. **Please note that moving forward, we will deliver all documents via this medium.**
We have set up your access as follows:

Username: info@snapartners.ca
Password: 9HXpz4mnce

Please click on the link below to access the Portal.

To access the portal, please go to <https://portal.snapartners.ca>

Enter your Username and Password from above. After your initial login you will be prompted to change your Password to something meaningful to you. Your Username will remain your email address.

2. Enter your email address into the “**Email**” box.
3. Copy the temporary password from your welcome email and paste it into the “**Password**” box:

Login to S&A Partners Portal

*Email

*Password

Remember Me

SUBMIT

4. Click **SUBMIT**.

5. The portal will now ask you to re-set your password to your own private one (something you'll remember). Enter the same new password twice:

S&A Partners Portal

*Password

*Confirm Password

SUBMIT

6. Click **SUBMIT**.

7. The portal will tell you that 'Your password was successfully created.'

8. Now you are in your new portal.

Example of what your portal should look like:

S&A Partners Portal

000 Test Client - Admin Testing for Portal

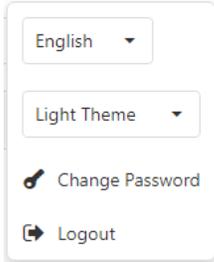
Folders

- + 
- 
- 
- ▼ Portal
 - ▼ Download
 - Tax
 - Advisory
 - Year End
 - T-Slips
 - ▼ File Transfer
 - Firm to Client
 - Client to Firm
 - info

Document Name

Changing password:

1. If you ever need to re-set your current password, go to the top-right hand corner of your portal screen:



2. Click **Change Password**.
3. The portal will now ask you to enter your new password. Enter it twice:

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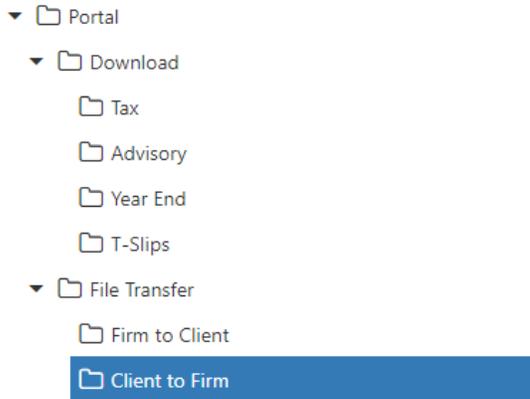
4. Click **SUBMIT**.
5. The portal will tell you that your 'Password Changed Successfully.':
portal.snapartners.ca says
Password Changed Successfully.
6. Click **OK**.

Uploading documents from you to us:

1. Once logged into your portal, click on the **Client to Firm** folder.

***Note:** Client to Firm folder and your 'private folder' named after your first name or your email address are the only folders where you can upload documents to us. The remaining folders are for you to download documents from.

Client to Firm folder example:

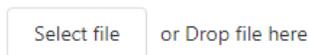


'Private folder' example:



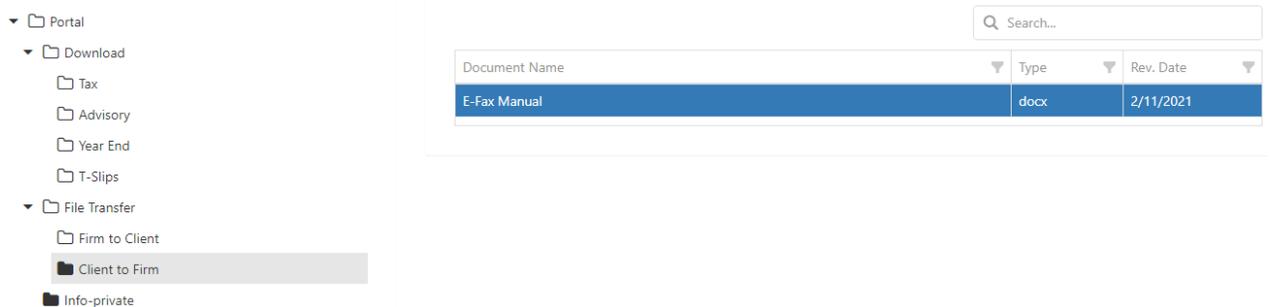
***'Private' folder meaning** = if multiple email addresses have access to your portal (e.g. you and your assistant) and you wish to keep some documents viewable only by you and us, you can upload/download them here.

2. Click on the upload icon  > click **'Select file'** > select the file to upload from your computer or drag and drop your document into the 'Upload Document(s)' box:



3. Click
4. Your file has now been uploaded onto your portal and we will receive an email notification to info@snapartners.ca to download it:

Example of an uploaded file:



5. The 'Client to Firm' folder will show black to represent that there is a file present:
 Client to Firm
6. We will copy your uploaded document(s) onto our system and the original file(s) will remain on your portal for 365 days unless you decide to delete them.

Deleting a file:

1. Click on the file you wish to delete.
2. Click on the following icon: 
3. Click **Yes**:

Delete Document(s)

Are you sure you would like to delete the following document(s)?

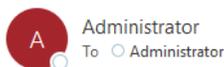
E-Fax Manual

Downloading documents from us to you:

1. You received an email notification that there is a document in your portal from us for you to download. The email will specify the folder name and the file name (so you know where to find it):

Notification email example:

Portal Upload Notification



Hello,

Please note that the following file(s) have been uploaded to the Portal:

Client: 000 Test Client - Admin Testing for Portal
Folder: Firm to Client
File(s): E-Fax Manual.docx

To access the portal, please go to <https://portal.snapartners.ca>

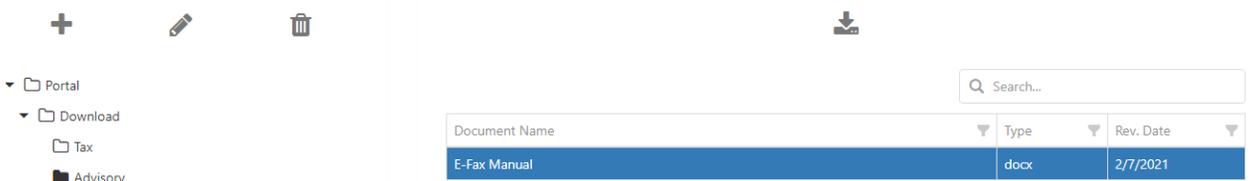
2. Click on <https://portal.snapartners.ca> to log in.
3. The file can either be located in the '**Download**' section:
All folders in the Download section are read-only, where you can download documents we will upload for you.

You will receive an email notification every time a document is uploaded here for you to download & the email will specify the folder containing new documents + the folder will appear black on your portal like this:



4. Click on the black folder > click on the file to be downloaded > click the download icon  :

Example:

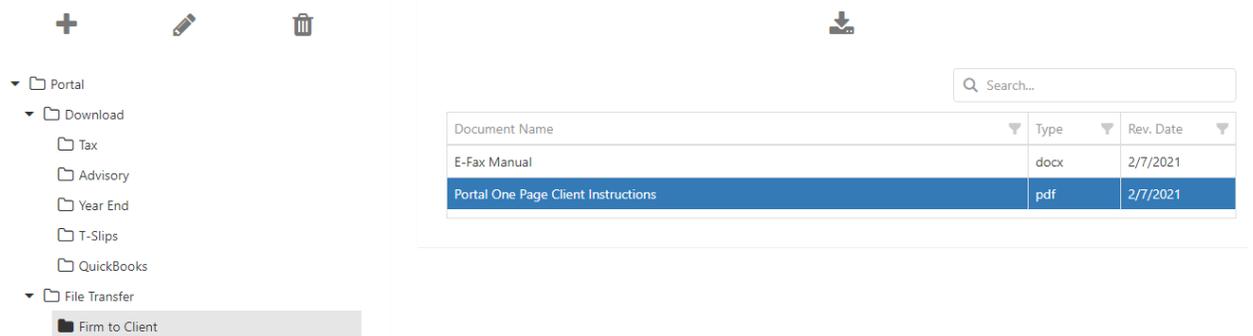


The selected document will now download onto your computer.

5. Or the file to download can be in the '**File Transfer**' section > '**Firm to Client**' folder:
If the file to be downloaded does not fit into any of the pre-set categories in the Download section, it may be placed in the Firm to Client folder for you to download:



6. Click on the black folder > click on the file to be downloaded > click the download icon  :
- Example:**



7. The selected document will now download onto your computer.
8. These file(s) will remain on your portal for 365 days unless you would like for us to delete them, in which case please let us know by reaching out to our admin team at info@snapartners.ca.

Any troubleshooting issues:

1. Please feel free to reach out to our admin team at info@snapartners.ca.