

# Welcome to our Collaborate Portal

You have been invited to view and approve documents through our Collaborate portal and will be notified by email when documents become available for you to review.

The benefits of using our Collaborate portal include easier and faster access to your documents, digital approval and enhanced security for your personal information.

## Accessing the Collaborate Portal

There are four ways to access the portal.

1. Follow the link in the notification email.
2. Visit our website [www.nexiaem.com.au](http://www.nexiaem.com.au) and select 'Client Portal' > 'Collaborate Portal'
3. Visit <https://edwardsmarshall.sharepoint.com/sites/nem-and-fyi-collaborate>
4. Search 'Nexia Edwards Marshall' in the Apple App or Google Play Store and download our app

## Logging into the Collaborate Portal

Please follow the link in your welcome email to sign up for your portal. You must sign up using a Microsoft account. If you do not have a Microsoft account, you will be promoted to set one up using your existing email address.

## Tasks

You will be notified via email when there is a new document uploaded. Please follow the prompts within the portal to assist you with viewing, signing or authorising a document.

## Uploading documents to the Collaborate Portal

You can upload documents through the Collaborate Portal and these will be sent directly through to your client manager. Simply click the drag your document into the upload folder.

## Having trouble accessing your Collaborate Portal?

- If you have forgotten your password, select 'forgot my password' on the login screen to reset it.
- If you do not receive the email to reset your password, please check your spam or junk folder.
- If your email isn't associated with a Microsoft account, you can sign up for a new account using your existing email address.
- If you have additional contacts you wish to allow access to your portal, please contact your Nexia Edwards Marshall Advisor.

# Collaborate Portal

## Scanning Documents to Collaborate Portal through the Nexia Edwards Marshall App

Please see the below instructions to scan documents to the Collaborate Portal through the Nexia Edwards Marshall App:

### For IOS (Apple)

- Open Notes > Click New Note > Scan
- Scan all relevant documents and save
- Click the three dots in the top right hand corner and select 'send a copy' then 'save to files'
- Open NEM App & login to Collaborate
- Click the + symbol and choose file to upload
- Tap to select the document to upload then tap "Add a description" and tap "Share" to complete.

### For Android

- Once you have 'scanned' the document, open Google Drive App
- In Google Drive, click on the 3 dots on right next to the document and select "Download" which will save to the Downloads folder to your phone
- Open NEM App and login to the Collaborate Portal
- Click the + symbol and choose file to upload
- A prompt will appear to "Choose an action" with options for "Camera, Camera Camcorder and Files". Choose "Files"
- It may default to "GoogleDrive" however tap 3 horizontal lines on top left then select "Downloads".
- Tap to select the document to upload then tap "Add a description" and tap "Share" to complete the upload.

