

Nimbus

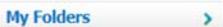
Using Nimbus is easy and it has a lot of useful features to make it an efficient portal interface between you and Saward Dawson.

Updating your details

Updating your details with Saward Dawson has never been easier. All you need to do is login to Nimbus and go to My Details . There you will see your contact details. If you have recently moved or changed contact details, all you need to do is enter your new details and press Apply. This will send Saward Dawson a notification of the changes.

Accessing your Documents

Note: You will receive an email notification from us every time we upload documents to you. To access your documents, either click on the link in the email or do the following.

Access to your documents is via the My Folders  menu option. Documents we send you will appear in the From Saward Dawson folder. To open this folder, click on the  button next to From Saward Dawson. This will list all the folders from us. To open the folders, click on the  button.

Downloading your Documents

Click on the document and it will open. Use the Download  button (at the bottom of the page) to save it to your computer.

Uploading Documents

You can also use the portal to upload files or documents rather than sending them to us by post or email. All communications and file storage are encrypted. Click on the upload icon  next to the To Saward Dawson folder (or another sub folder).

Browse [Browse...](#) to find the document(s) you wish to send us. You can select one or more documents to upload at the one time – either hold the Ctrl key and select on all the documents you want to send us or select them one by one by clicking on the [Browse...](#) button and choosing your documents one by one. Once you have finished selecting the document(s) you want to send us, select Upload . Once the document(s) has finished uploading, a message will appear saying it was successfully uploaded. We will automatically receive an email notification when they are uploaded.

Sharing Documents

Occasionally it is necessary to share documents sent from Saward Dawson with others. For example, your bank may require a copy of your income tax return.

Go to My Folders . Find the required document(s) and click on the Share icon  to the right of the document name. This will then prompt you to enter to details of the person you would like to share the document with. This will ensure only the document you nominated will be shared and they will not have access to your entire folder.

Folders

You can add folders to make electronic filing easier to manage. Go to My folders. On the right of the To Saward Dawson folder there is a add folder icon . Click on this and enter the name of the folder want to create.

Adding users

If you would like to add a user to your secure area (for contacts such as bookkeepers, power of attorney, etc), go to My Details [My Details](#) >. Then click on the Invites tab [Invites](#). There you can see anyone who has been invited to access your folder(s). To add a new invite, click on the green  and add in the contacts details. To select which folder(s) you would like to give them access to, click on Folder Access and tick/un tick the folders you want them to have access to. (You may not want to give your bookkeeper access to your personal folders.)

Conversations

When using Nimbus, you can have a conversation with the staff at Saward Dawson for or about a particular document. Go to My Folders [My Folders](#) >. Browse to the document you wish to have the conversation about. To the right of this there will be a conversation icon . Click on this and begin your conversation. Saward Dawson will be notified once you click Add Comment. This can be helpful to share passwords and access codes. Alternatively, Saward Dawson can begin a conversation with you. If we do, you will receive a notification email.

Forgot your password?

If you have forgotten your password, all you need to do is go to the login screen, enter your login code (this will most likely be your email address) and click on the key icon . Nimbus will then send you a password re-set email to enable you to change or re-enter your password. We encourage you to create a password easy for you to remember, but not too easy for someone else to guess what it might be.

Forgot your login code?

Please contact your Saward Dawson contact and they will be able to advise you what your login code is set to.