


## 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

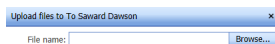
Note: You will receive an email notification from us every time we upload documents to you. Access to your documents is via the My Folders  menu option. Documents we send you will appear in the From Saward Dawson folder. You may leave them there as long as you wish or delete them.



### Downloading your Documents

Click on the document link and it will be opened in a Viewer. Use the Download  button 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  to find the document you wish to send us. Once you have selected the document, select Upload . Once the document has finished uploading, a message will appear saying it was successfully uploaded. You can then continue uploading if required or press close to finish. 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 . 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 your 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 Seward 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. Seward Dawson will be notified once you click Add Comment. This can be helpful to share passwords and access codes. Alternatively, Seward 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 . This will then reset your password and send you a notification email with the new details.