GUIDE TO CLIENT PORTAL:

A SPACE FOR YOU

QX
ACCOUNTING
SERVICES

QX
ACCOUNTING
SERVICES
CLIENT PORTAL

169 Notification   New Job   Dashboard   Jobs   Sean Paul – Tax Keeper ⌄

DASHBOARD

Job Status

Today's Completed Jobs ()

Search...   Search...

Job Code	Job Name
PS202699379846	Alex & Seirre Ltd-YE-31-03-2019(JU)_2
PS202698966846	Brain Smith-PTR-2018-19(SZ)_2
PS202698997787	Earnyzest Ltd-VAT-30-11-2019(SZ)_2
PS202699293846	Tactilebills Ltd-YE-30-04-2019(JU)

On Hold (35)
Completed (1024)
Current (73)

Completed (1024)

Year 2019 ▾

Monthly Jobs

150
125
100
75
50
25
0
Mar Apr May Jun Jul Aug Sep Oct Nov Dec

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1. Introduction to Client Portal: Have things your way

Why use the client portal?

The QXAS Client Portal is a one-stop shop for creating jobs, tracking and monitoring them. It enables our clients to get access to information they need 24/7 on their workstations and mobile devices. Backed up with some responsive functionality, the portal gives relentless support to our clients using real-time accessibility, faster communication and powerful analytics to forecast for the future.
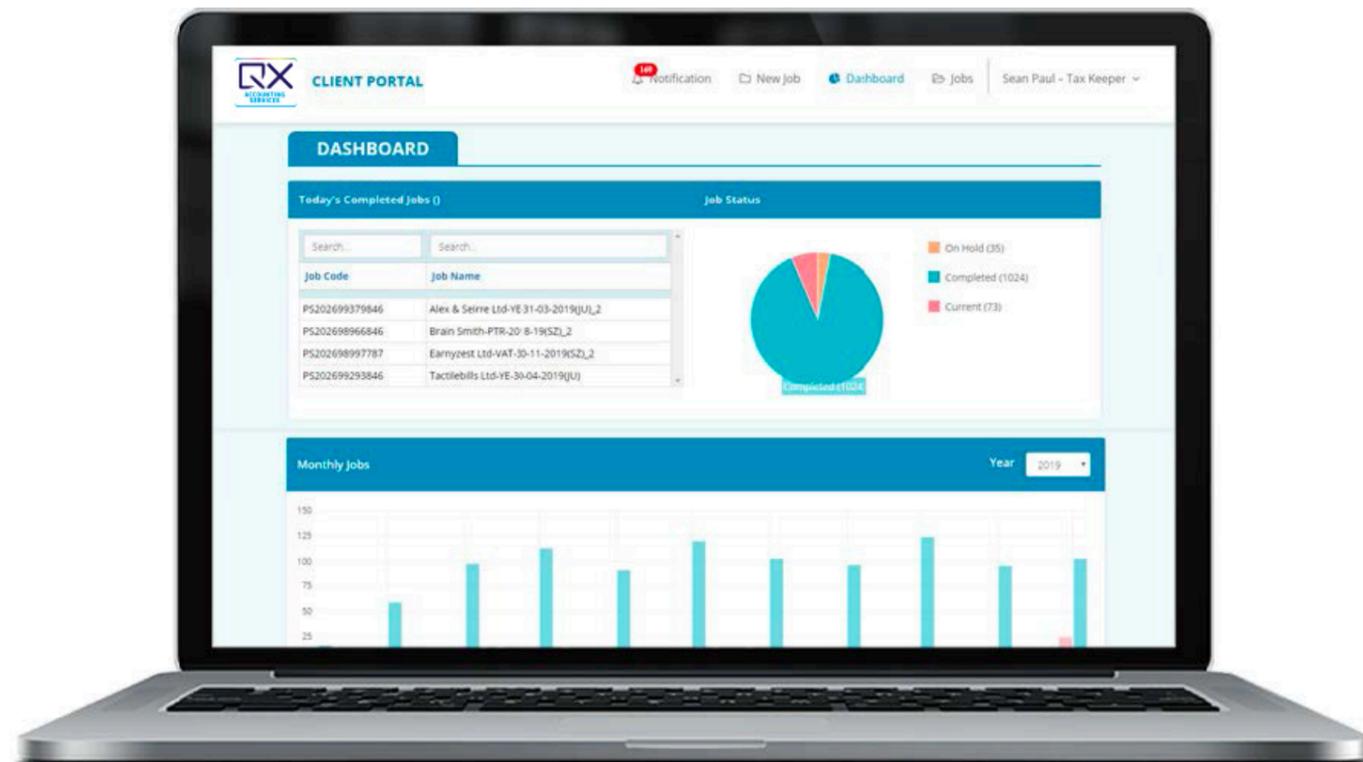
The Mobile Counterpart: The QXAS Tracker App

The QXAS Tracker app lets you use all the functions of the client portal while you're on-the-go. You can monitor the status of your outsourced tasks from your smartphone — raise queries about jobs, search the dashboard, and filter jobs by job code, name, status and dates the jobs were received.

2. The Client Portal: An Overview

Login

Keep your credentials handy and saved for a quick login into all your outsourced business.

Your Account

This is your space for updating passwords, usernames, contact details and other login credentials

Dashboard

It gives you a broad overview of your current status of jobs, profits margins and the forecasts for future endeavors.

New Jobs

This is your space to create new jobs on-the-go with a few clicks to convey your preferences.

Jobs

From the hopping on to a quick conversation with your outsourced team to updating new instructions for your job requirements – this is your one-stop shop for tracking all your outsourced work.
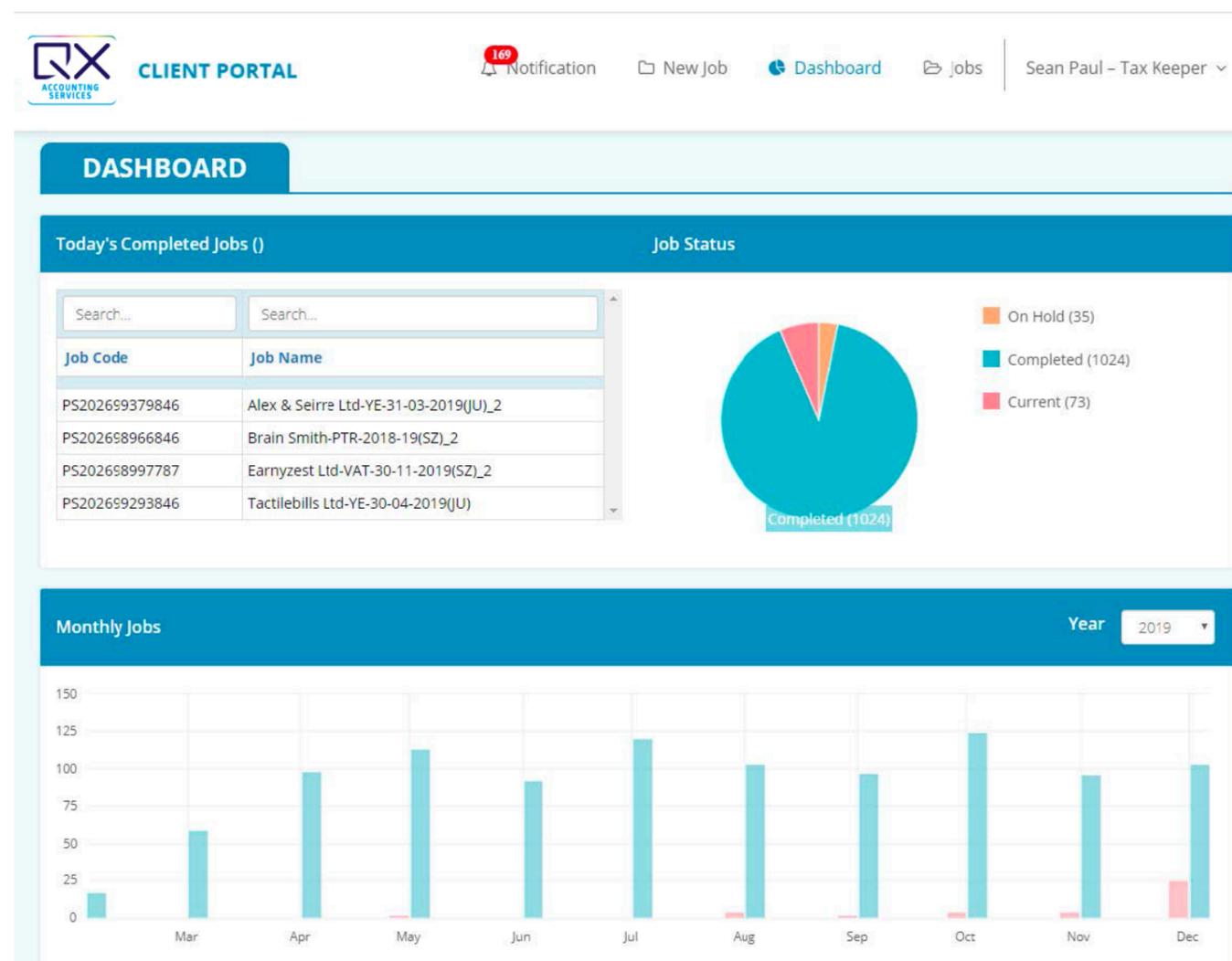
3. Login to Get Access Anywhere, Everywhere

3.1   Use Your Client Credentials

You can login into client portal using your client credentials. Keep your client on-boarding email handy— it consists of your login user ID and a one-time password to log in to the portal.
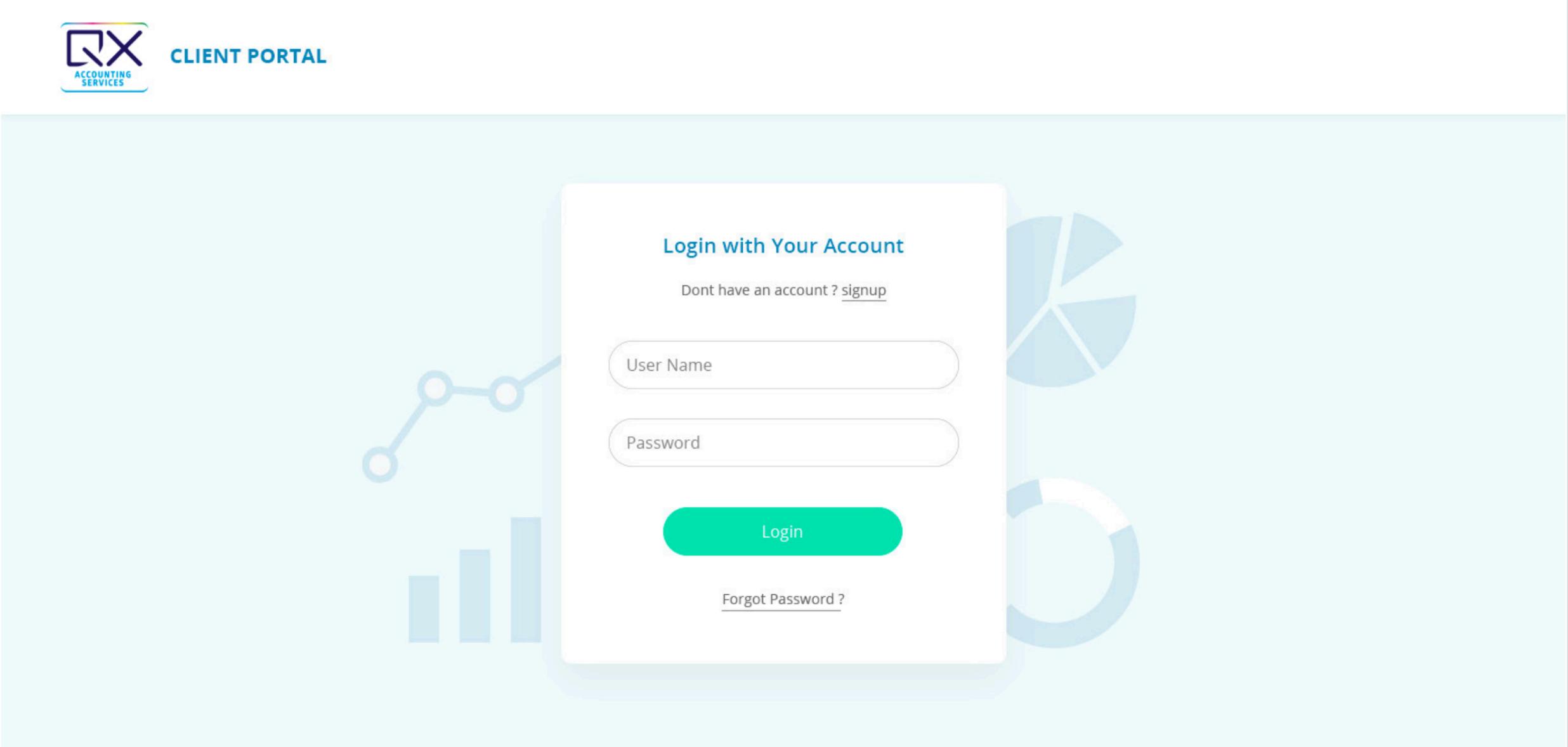
3.2   Forgot Your Password? Get it back right away.

Just enter your registered email address and we'll send your password right away on your email.

CLIENT PORTAL

Notification   New Job   Dashboard   Jobs   QXAS ∨

Home > Change Password

CHANGE PASSWORD

Old Password

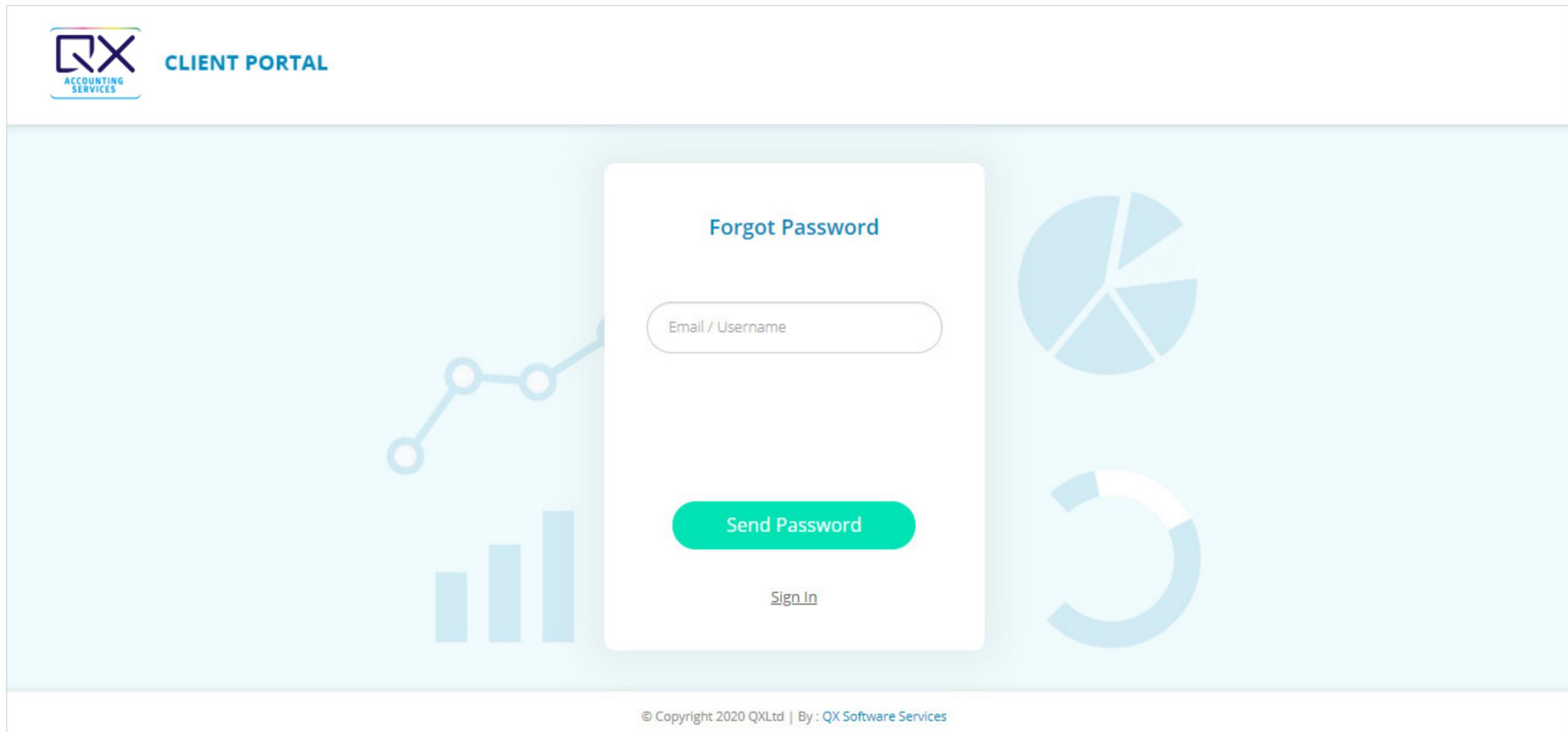New Password

Confirm Password

Save   Cancel

3.3 Change Your Password – With One You Can Remember

Sometimes, it's easier to remember a password you came up with yourself. Update your password with just a few clicks and confirm it over email – you will be all set to login with your new password.

4. Features to Make You Quicker

Explore the powerful features of the client portal for greater clarity, focus and vision for your business. Let's navigate through them to help you monitor your progress, track jobs and forecast profits for your business.

Status updates on-the-go
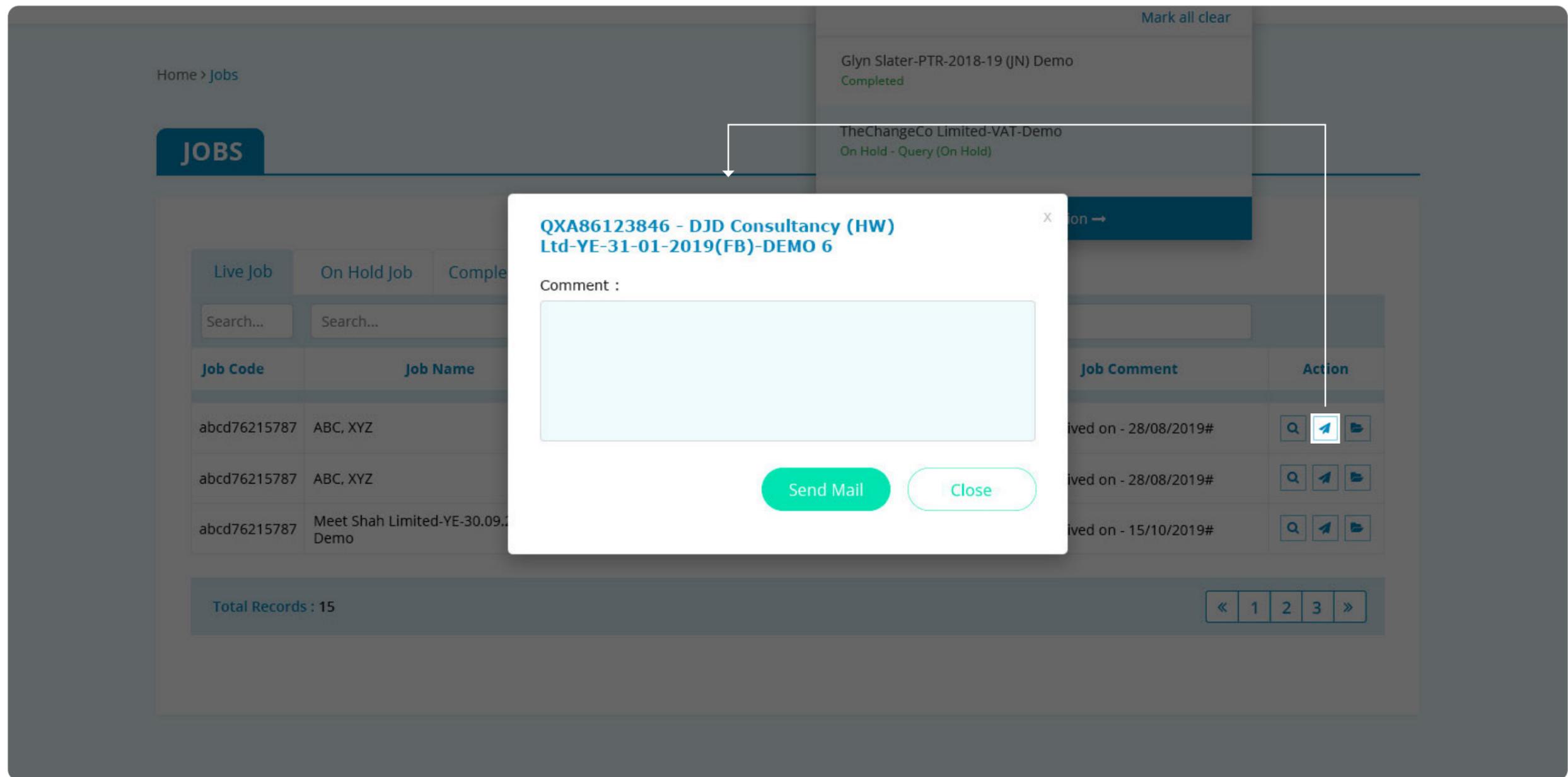
Get notified as your job gets processed through all the key stages

Seeking support on-the-go

Find answers quickly by raising queries with our support agents right from the client portal on your PC or from the QX tracker app on phone.

New Job Detail

Assignment Type *

Year end account	⌄

Record Type *

Mannual records

Name of client *

Contact person *

Email *

Year end *

Budgeted hours *

Accountancy Fees(Net) *

Select Attachment(s)

Choose File   No file chosen

Total attachment(s) size up to 100 MB.

Creating, tracking and monitoring job on-the-go

Assign new tasks to your India team with just a few clicks. Choose the type of assignment and fill out the standard checklist on the app – your job will be uploaded, processed and done, before you know it.

Job Code	Job Name	Status	Sub Status
PS202699955846	Leesa Ltd-VAT-31-10-2019(SY)-EC Sales	In Progress	In Progress
PS202699951846	Dr des fernandes-PTR-05.04.2019 – Admin (JU)	In Progress	In Progress
PS202699907846	Revoy Compaund Ltd-VAT-30-11-2019(SY)	Reviewed	Can be Started
PS202699890846	Beyoundsouth Ltd-VAT-30-11-2019(JU)	In Progress	In Progress
PS202699795846	Neborah Bunmi-YE-05-04-2019(SZ)-ADMIN	In Progress	TL Review

Received On	Job Comment	Action
28/08/2019	Received on - 28/08/2019#	🔍 ✈ 📂
28/08/2019	Received on - 28/08/2019#	🔍 ✈ 📂
15/10/2019	Received on - 15/10/2019#	🔍 ✈ 📂

Powerful analytics for your business on-the-go

Weigh decision based on data from across your outsourced work: from monthly job summary, job turnaround time and a detail margin report. Interactive dashboards provide in-depth impact analysis of every potential outsourced project.

Job Status

- On Hold (37)
- Completed (1015)
- Current (74)

Completed (1015)

Monthly Jobs

Year 2019 ▼

Current Completed
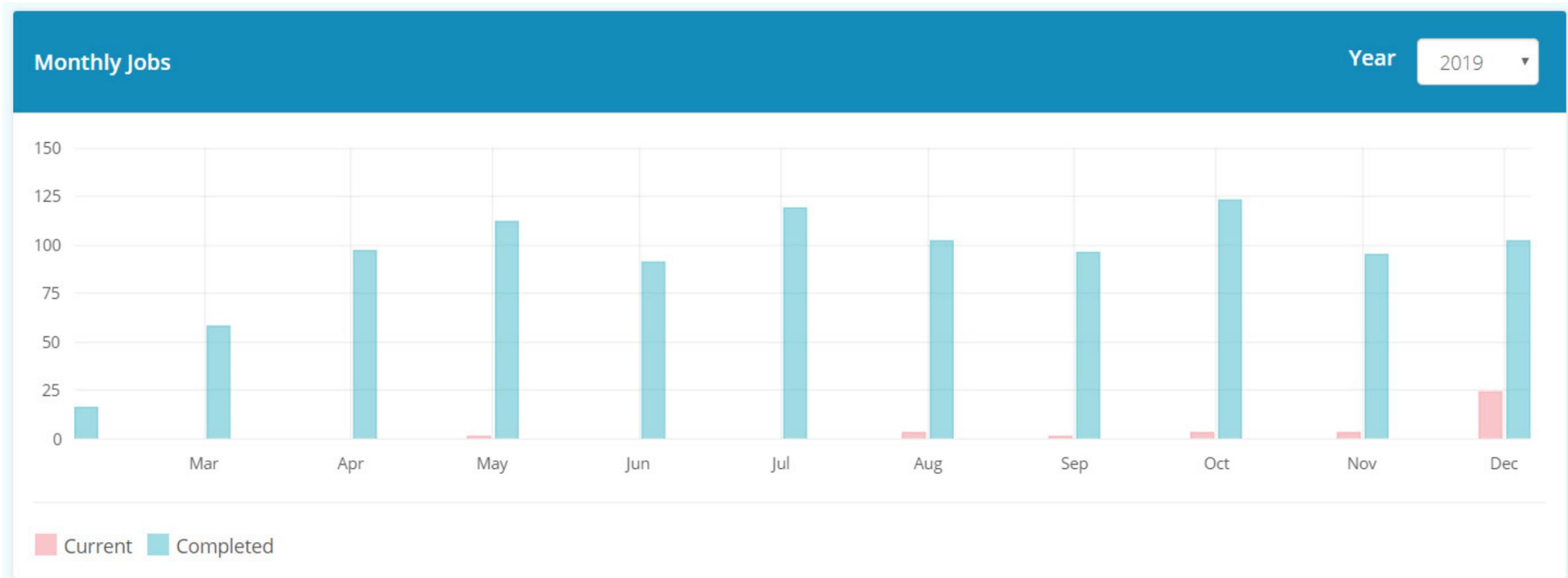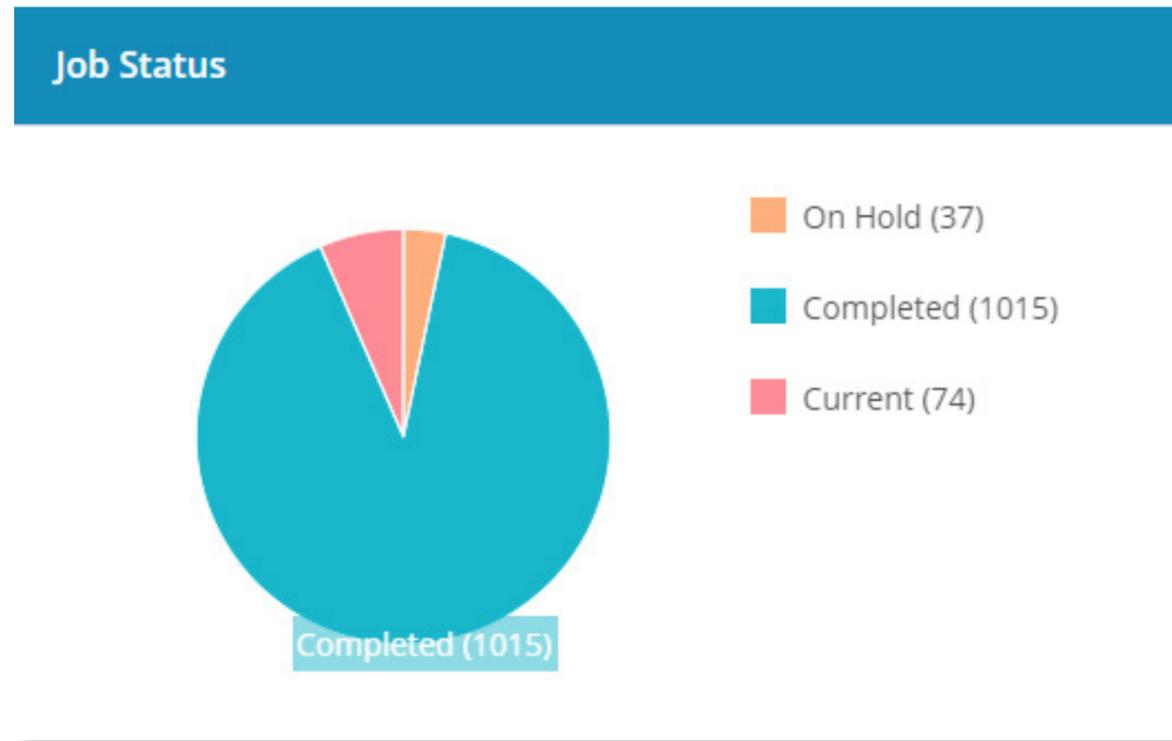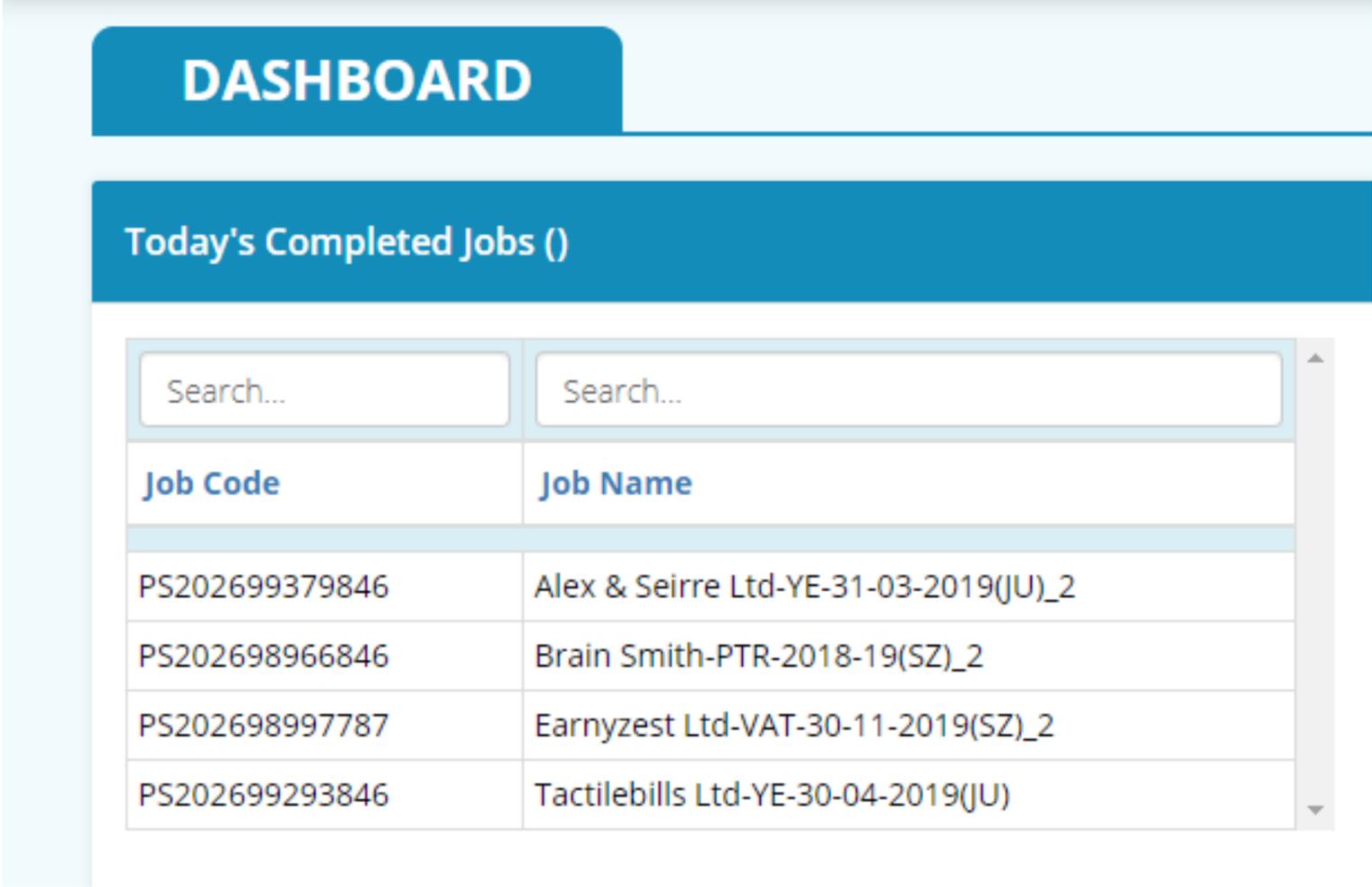
5. Dashboard

The interactive dashboard provides in-depth analysis of your outsourced projects including – a margin report, a monthly report and the turnaround time of the jobs delegated to your India team.

There are five section in the dashboard.

5.1 Today's completed jobs

Here you can view the list of jobs which has been completed on that day.

5.2 Job Status

Here you are able to view the progress of the jobs through these key stages:

- Live/Current Jobs: These are jobs that are currently in progress.

- On hold jobs: There jobs that are kept on-hold due to unresolved queries raised by your outsourced accountants. Shoot them an email, call or reach out to them through the client portal to resolve the queries.

- Completed jobs: All you completed projects are displayed here. You can review them, raise queries or look at other analytics concerning the completed jobs.

Get more insights on to these stages of your job by clicking on any key stage. You will be redirected to the sections for reviewing more details about the progress and handling of your job.
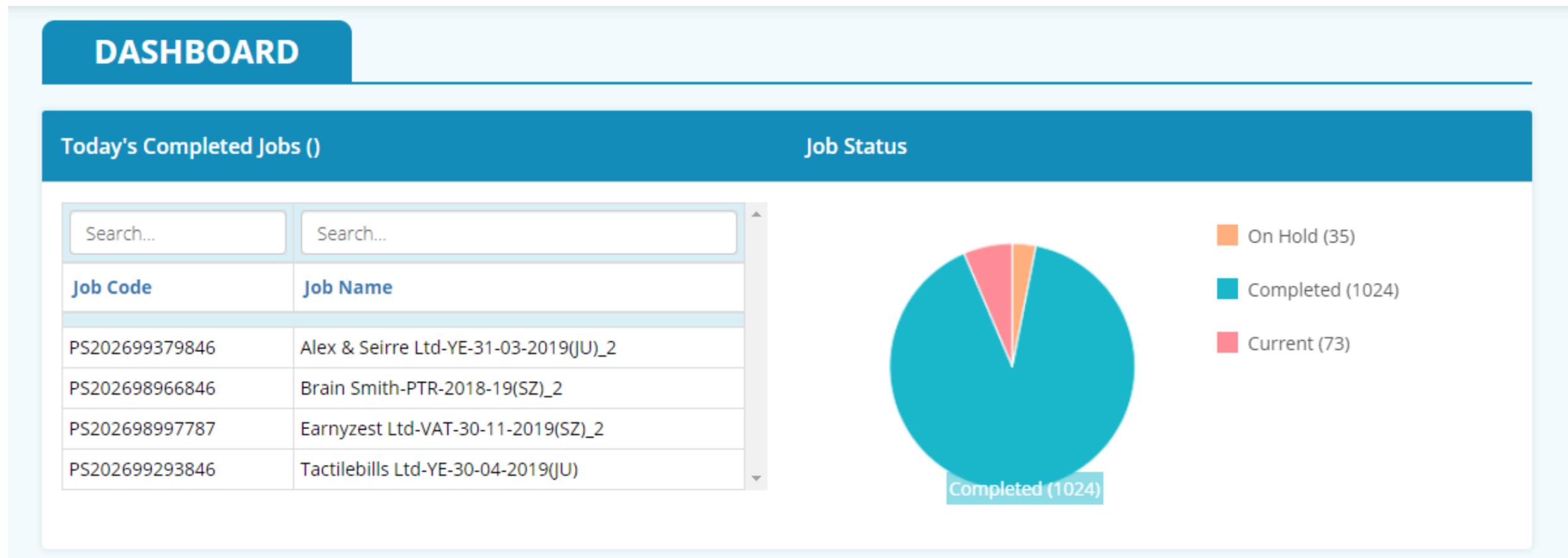
5.3   Your Monthly jobs

Here you are able to see list of a report on all current and completed jobs on monthly intervals. The interactive dashboards on month-wise jobs is a power tool to take a deeper look into the volume of completed, on-hold or current jobs.

It gives you insights into how to prepare better when delegating tasks or what other tasks you can outsource in the future based on the efficiency of work.
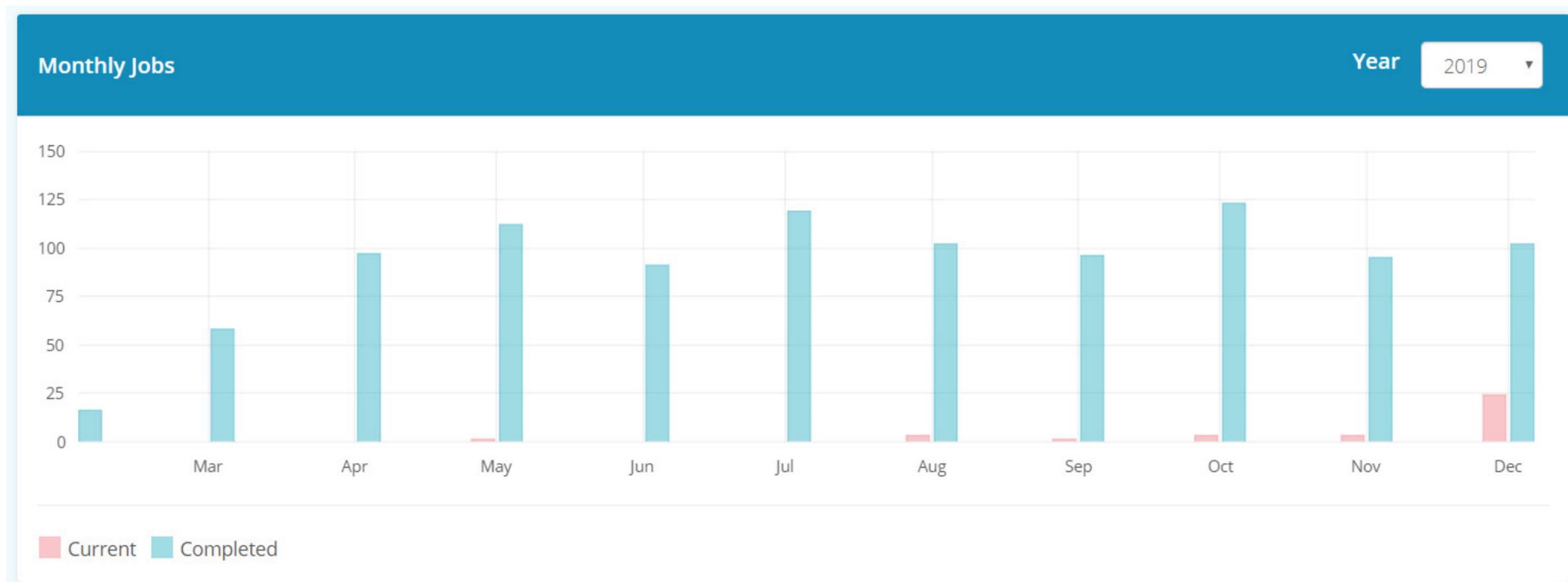
5.4   Your Job's Turn-Around-Time

Here you can view the average Turn-Around-Time for all completed jobs on a monthly basis.
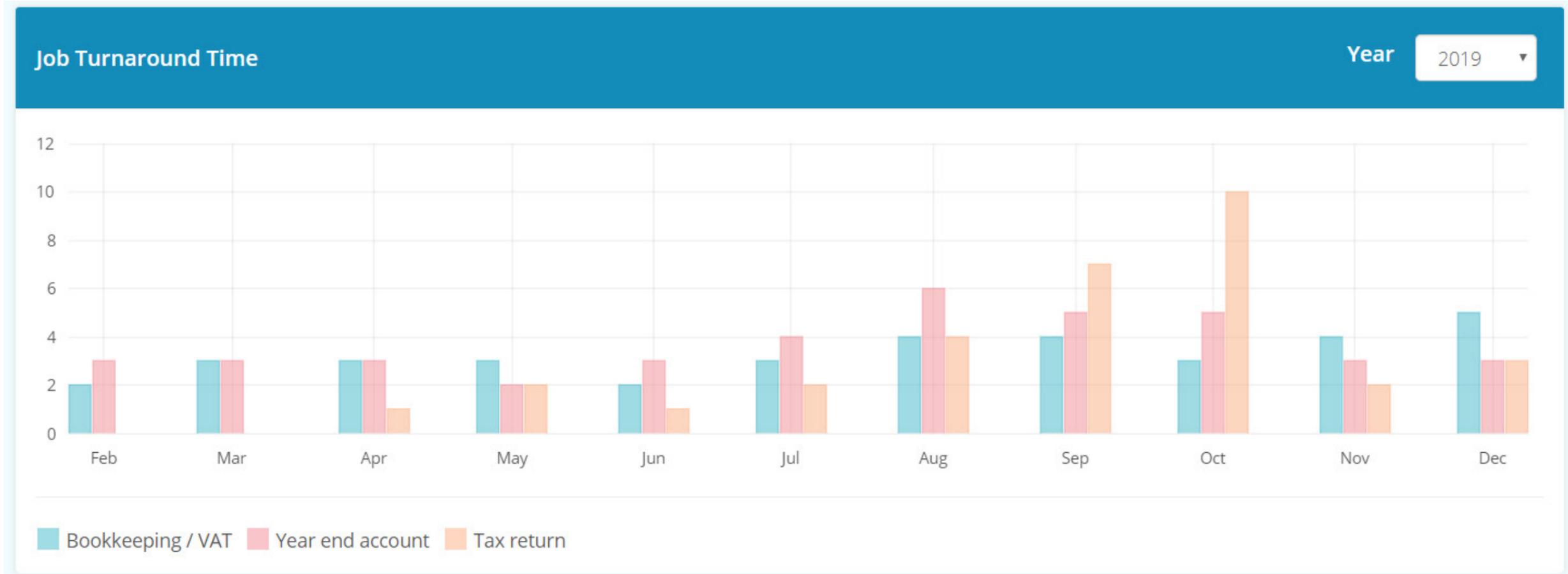
5.5   Your Margin Report (%)

Here you can view the average marginal profits in percentage for each month. It also shows your spending, billing and requested turnaround time against the number of hours spent.

It will help you determine the outcomes of your outsourced jobs and find certainty in future outsourcing decisions.
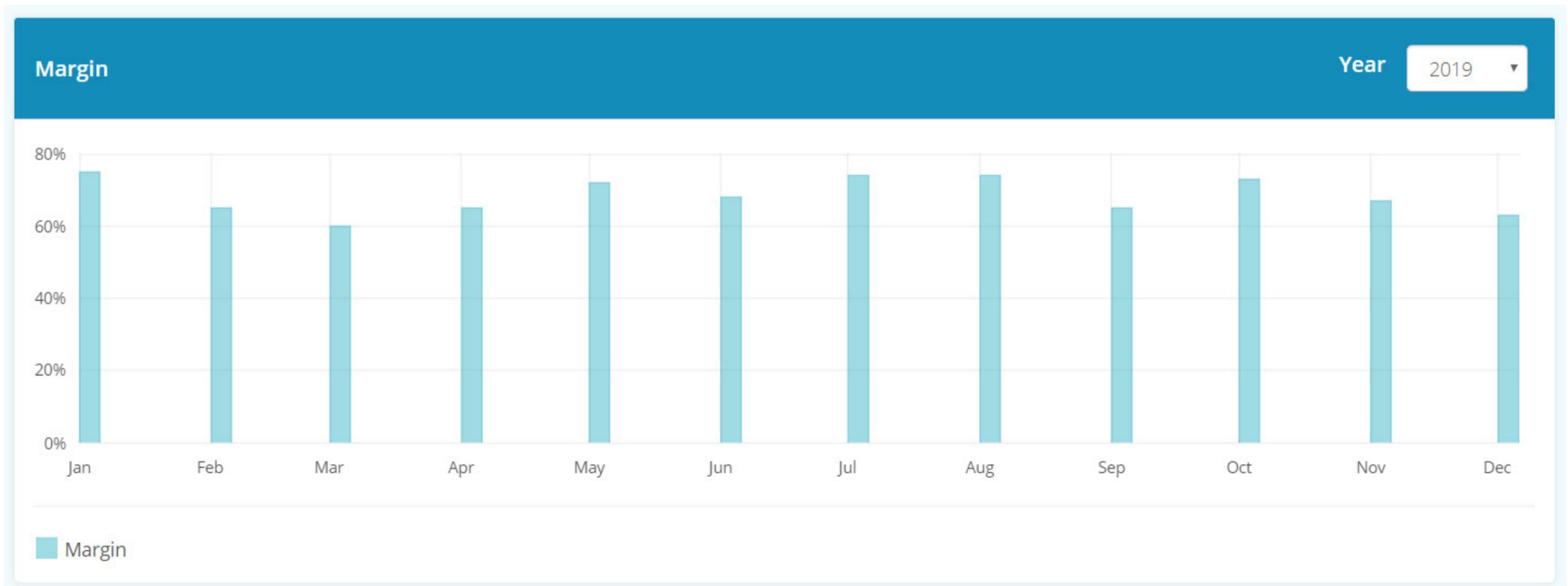
6. New Job

This is your one-stop-shop for creating and assigning jobs. You just have to fill out some general information such as assignment type, attach the required documents and fill the checklist accordingly.

6.1 Select the Job Type

» **Year-end accounts**

» **Bookkeeping/VAT**

» **Tax return**
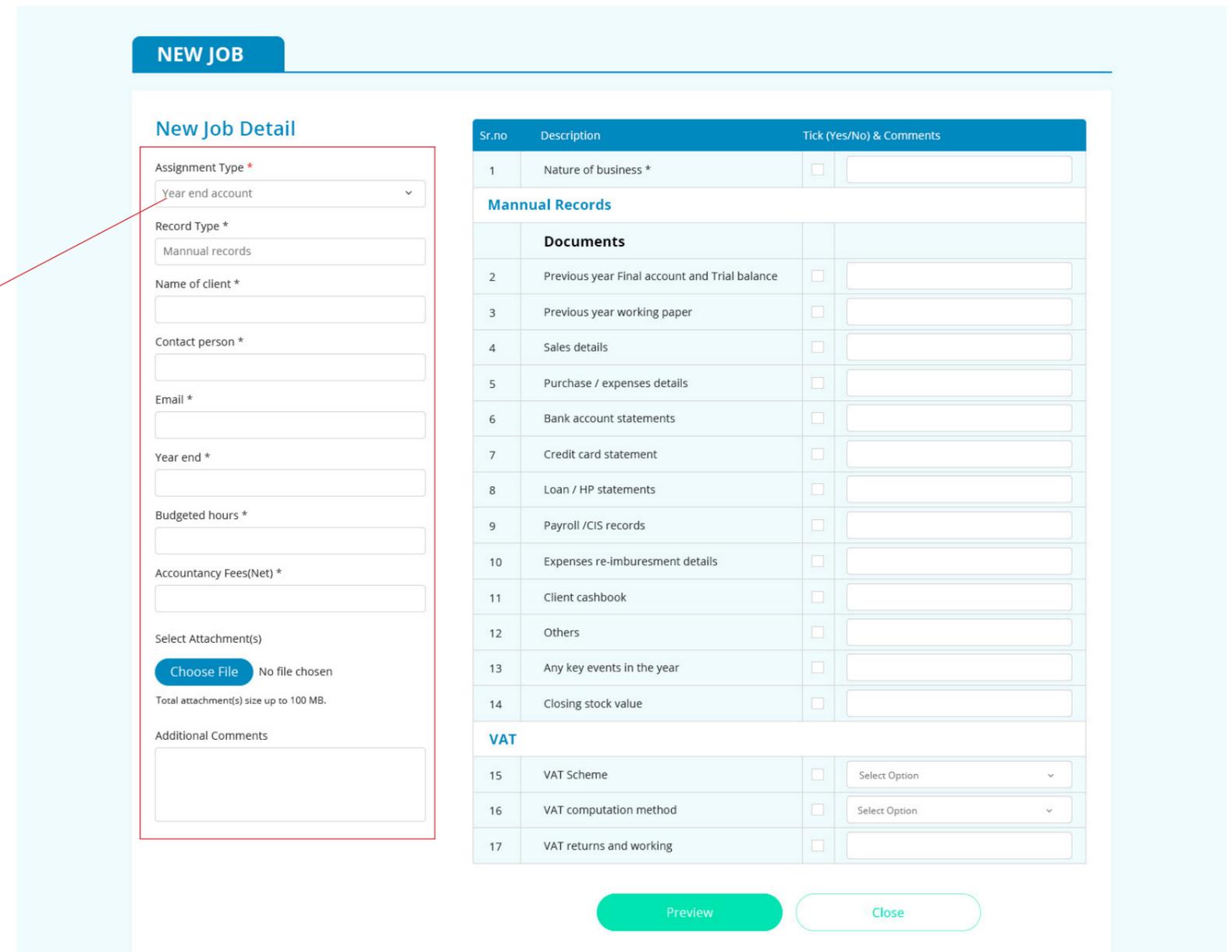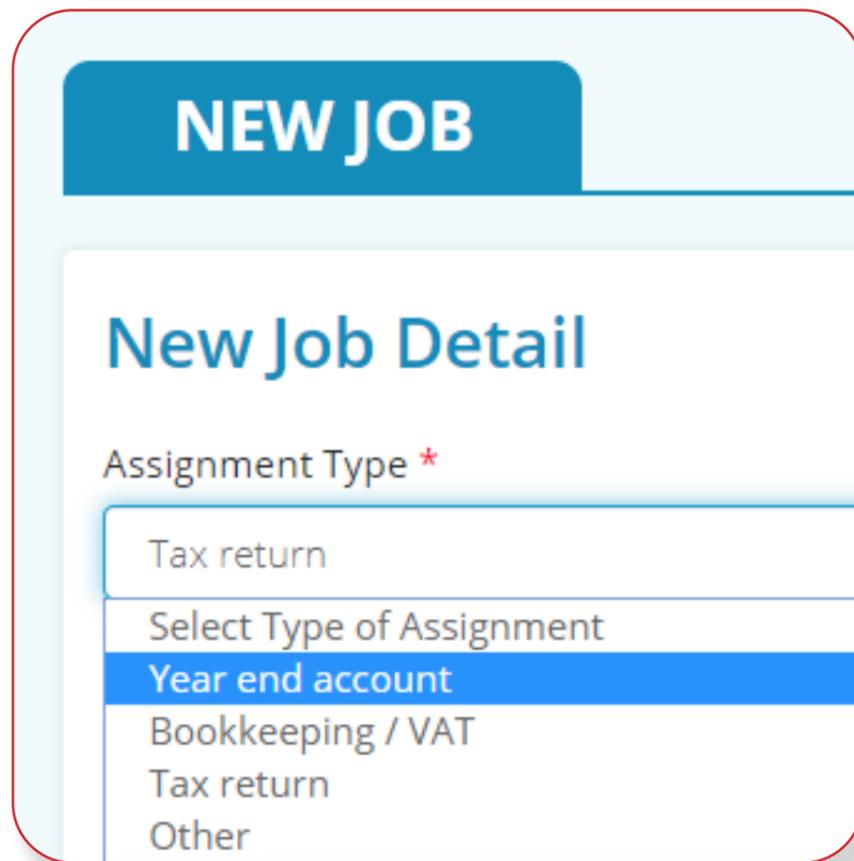
6.2   Secondary fields for Job Types

When you select a Job Type, you will see additional fields to complete depending on what you have chosen. For example, if you choose **Assignment Type > Year-end accounts,** you will see:

Record Type: Here you may choose between two kinds of record types :

>**Manual Records:** You can choose this option if you've gathered your client's records in manual formats like sales invoices, bank statements, purchase invoices etc.

>**Software Working:** You can choose this option if your client's bookkeeping has already been uploaded in an accounting software.

Name of the client : Here enter your client's name (individual or business).

Contact Person: Enter you designated contact person's name for that particular task. It could be you, your manager or someone that your India team can be in touch with while the job gets processed.

**Email Address:** Enter your contact's email address

Year End: Enter the year for which you'd like your accounts to be prepared

Budgeted Hours: Enter the estimated number of hours you are delegating the job for

Accountancy Fees (Net): Enter the accounting fees that you are charging to your end clients.

Selecting Attachments and Comments: And lastly, upload the necessary documents – required to process the job. Refer to your checklist on the right to know what documents you have checked off and upload them here.

NEW JOB

New Job Detail

Assignment Type *
[Year end account ▾]

Record Type *
[Manual Records ▾]

Name of client *
[   ]

Contact person *
[   ]

Email address*
[   ] ⓘ

Year end *
[   ]

Budgeted hours *
[   ]

Accountancy Fees(Net) *
[   ]

Select Attachment(s)
Click here for attachment(s)
[Choose Files] No file chosen

Total attachment(s) size up to 100 MB.

6.3   The Job Checklist

When you select a Job Type, you will see a job checklist to complete depending on what type of job assignment you've selected. **For example, if you choose Year-end Accounts Assignment type, you will see:**

Nature of Business: Here you can enter comments on the nature of clients business. For example, whether they are a confectionary shop or a self-employed individual with an online baked goods selling business.

Manual Records/ Software Records: In case you selected software working , enter your software's login credentials here.

Documents: This is where all the documents that are required for processing your client's year-end accounts is listed.

> » Check off all the documents that you will be sending over to you India team.

> » Once you've gone through the checklist, upload the documents you've checked in the attachments section on the far left of the page.

Sr.no	Description	Tick (Yes/No) & Comments	
1	Nature of business *	☐	
Mannual Records			
	Documents		
2	Previous year Final account and Trial balance	☐	
3	Previous year working paper	☐	
4	Sales details	☐	
5	Purchase / expenses details	☐	
6	Bank account statements	☐	
7	Credit card statement	☐	
8	Loan / HP statements	☐	
9	Payroll /CIS records	☐	
10	Expenses re-imburement details	☐	
11	Client cashbook	☐	
12	Others	☐	
13	Any key events in the year	☐	
14	Closing stock value	☐	

6.4 VAT Records:

» Here you can select your client's **VAT scheme > Flat, Standard or Special**

» You can also select their **VAT computation method > Accrual or Cash**

» You can also add additional comments on your client's VAT returns and working

VAT				
15	VAT Scheme		☐	Select Option ⌄
16	VAT computation method		☐	Select Option ⌄
17	VAT returns and working		☐	

Preview   **Close**

7. Jobs

Jobs section gives you insights into all your outsourced business. Here are the four main tabs to look into all your live, on-hold, completed or drafted jobs.

Live Jobs: All jobs which are currently work in progress will be displayed in the live/current job section

On hold jobs: All jobs which are currently on hold are displayed in the on-hold job section

Completed jobs: All completed jobs are displayed here

Draft jobs: All jobs which are submitted but not assigned to a user will be displayed in the draft job section

JOBS

Live Job	On Hold Job	Completed job	Draft job
Search...	Search...	Search...	Search...

Job Code	Job Name	Status	Sub Status
abcd76215787	ABC, XYZ	Not Started	Initial Review
abcd76215787	ABC, XYZ	In Progress	In Progress
abcd76215787	Meet Shah Limited-YE-30.09.2019 Demo	In Progress	Second Phase

Total Records : 03

7.1   Navigating Job Functions

Explore the different functions for navigating through your jobs area to track the progress of your jobs and develop a seamless connection with your India Team.
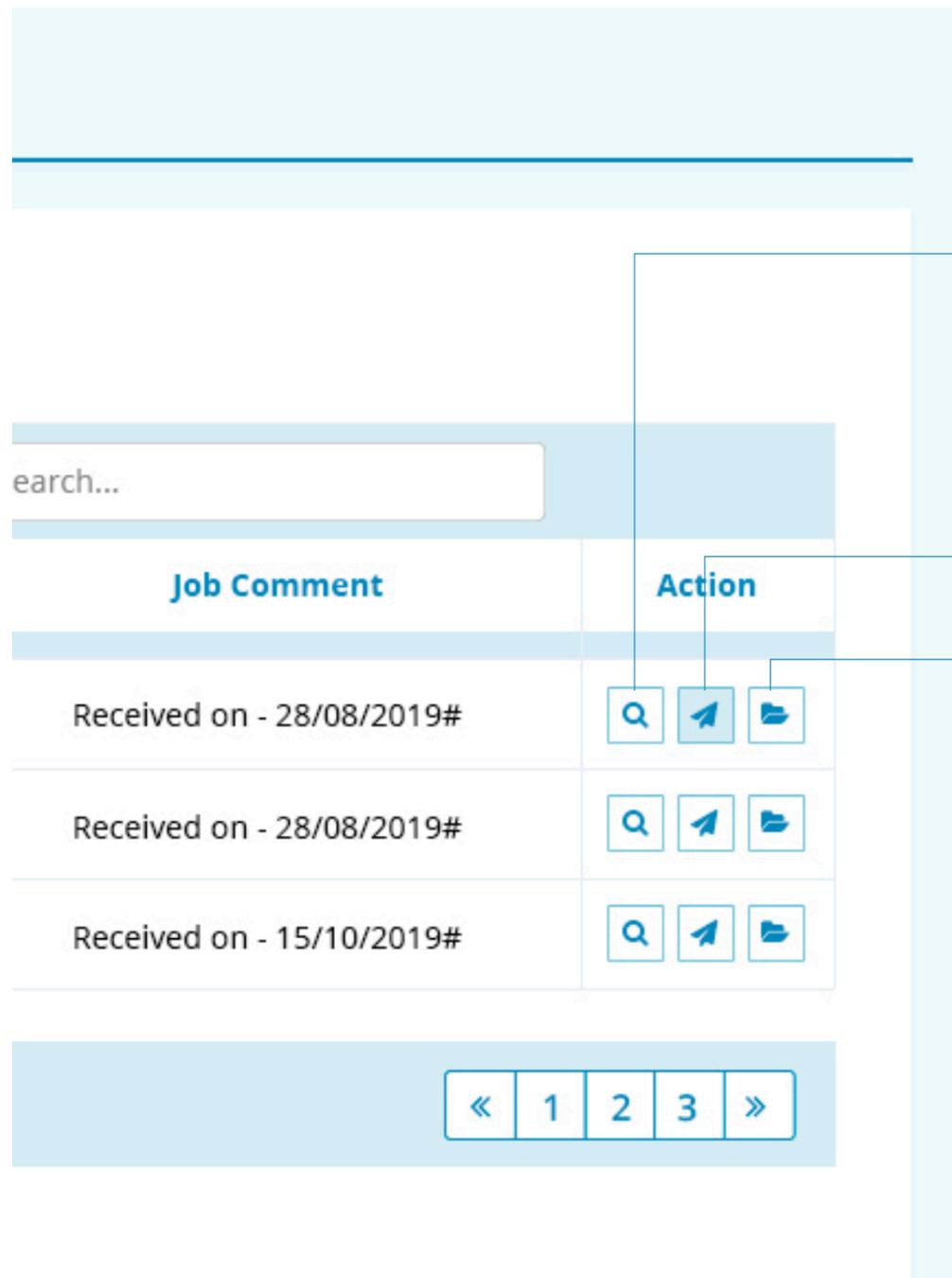
View job details: Here you can view all the details and logs on the assigned jobs.

Send Query: Here you can raise queries about the job. Your outsourced team member will get back to you within a few hours of submitting your queries.

Job data: Here you can preview the jobs created by you or your India team. .

Job Comment	Action
Received on - 28/08/2019#	🔍 ✈ 📂
Received on - 28/08/2019#	🔍 ✈ 📂
Received on - 15/10/2019#	🔍 ✈ 📂

« 1 2 3 »

Still Need Help?

Contact your operations manager or write to us at qxas@qxglobalgroup.com for instant support on the client portal, your outsourced jobs or any outsourcing related queries.

Give us your feedback

Our client portal was designed to give a premium outsourcing experience to our clients. Let us know your thoughts on your client portal experience and the ways we can do better at servicing you.

Write to us at team@qxas.co.uk.

Share your Client Portal Experience

Let's grow your practice, together

Email **qxas@qxglobalgroup.com**, or call **0845 838 2452** for a instant support.

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