

ezytax
BLUE

adobe sign



ADOBE SIGN

- 1) Go to web browser and Copy/Open the following Link:

[https://auth.services.adobe.com/en_US/deeplink.html?deeplink=ssofirst&callback=https%3A%2F%2Fims-na1.adobelogin.com%2Fims%2Fadobeid%2FEchoSign%2FAdobeID%2Fcode%3Fredirect_uri%3Dhttps%253A%252F%252Fgps.echosign.com%252Fpublic%252FadobeIDLogin%253Fserver%253Ddezytaxblue.au1.documents.adobe.com%2526port%253D443&client_id=EchoSign2&scope=openid%2CAdobeID%2CDCAPI%2Cadditional_info.account_type%2Cskybox%2Cupdate_profile.first_name%2Cupdate_profile.last_name%2Cagreement_send%2Cagreement_sign%2Csign_library_write%2Csign_user_read%2Csign_user_write%2Cagreement_read%2Cagreement_write%2Cwidget_read%2Cwidget_write%2Cworkflow_read%2Cworkflow_write%2Csign_library_read%2Cadditional_info.projectedProductContext%2Csign_webhook_read%2Csign_webhook_write%2Csign_webhook_retention%2Csa.ACOM_ESIGN_TRIAL%2Cee.GROUP_SIGN_WEB&denied_callback=https%3A%2F%2Fims-na1.adobelogin.com%2Fims%2Fdenied%2FEchoSign%2Fredirect_uri%3Dhttps%253A%252F%252Fgps.echosign.com%252Fpublic%252FadobeIDLogin%253Fserver%253Ddezytaxblue.au1.documents.adobe.com%2526port%253D443%26response_type%3Dcode&relay=e6c5c1f7-8b14-48c7-a6bd-37fbfe724438&locale=en_US&flow_type=code&ctx_id=Adobe_Sign&idp_flow_type=login#/#/](https://auth.services.adobe.com/en_US/deeplink.html?deeplink=ssofirst&callback=https%3A%2F%2Fims-na1.adobelogin.com%2Fims%2Fadobeid%2FEchoSign%2FAdobeID%2Fcode%3Fredirect_uri%3Dhttps%253A%252F%252Fgps.echosign.com%252Fpublic%252FadobeIDLogin%253Fserver%253Ddezytaxblue.au1.documents.adobe.com%2526port%253D443&client_id=EchoSign2&scope=openid%2CAdobeID%2CDCAPI%2Cadditional_info.account_type%2Cskybox%2Cupdate_profile.first_name%2Cupdate_profile.last_name%2Cagreement_send%2Cagreement_sign%2Csign_library_write%2Csign_user_read%2Csign_user_write%2Cagreement_read%2Cagreement_write%2Cwidget_read%2Cwidget_write%2Cworkflow_read%2Cworkflow_write%2Csign_library_read%2Cadditional_info.projectedProductContext%2Csign_webhook_read%2Csign_webhook_write%2Csign_webhook_retention%2Csa.ACOM_ESIGN_TRIAL%2Cee.GROUP_SIGN_WEB&denied_callback=https%3A%2F%2Fims-na1.adobelogin.com%2Fims%2Fdenied%2FEchoSign%2Fredirect_uri%3Dhttps%253A%252F%252Fgps.echosign.com%252Fpublic%252FadobeIDLogin%253Fserver%253Ddezytaxblue.au1.documents.adobe.com%2526port%253D443%26response_type%3Dcode&relay=e6c5c1f7-8b14-48c7-a6bd-37fbfe724438&locale=en_US&flow_type=code&ctx_id=Adobe_Sign&idp_flow_type=login#/)

- 2) **Username:** taxreturns@ezytaxblue.com.au
- 3) **Password:** TBA

SENDING DOCUMENTS FOR SIGNING:

- 1) Click **Send** in the top left hand corner
- 2) Enter **Client's** email address under Recipients – Enter Recipients Email
- 3) Agreement Name – Enter: **{Financial Year} Income Tax Return.**
EG: You are sending a 2021 tax return – 2021 Income Tax Return
Or You are sending a BAS – September 2021 Business Activity Statement.
- 4) **Copy** the below message into Message Box under the Agreement Name and adjust for each client – **Change** the yellow highlighted sections and if anything needs to be removed or added to the message. Add multiple returns to the one message always in the order of ELS, Sub Dec.

Dear **xxx**,

Thank you for sending the required information and payment.

Please see attached a copy of your completed **YEAR** tax return. The estimated refundable amount is **\$xxxx**.

Please sign and return the following:

Tax Return File Name – Page 2 Part A and Part B, sign and date

Client Substantiation Declaration – Name at top, sign & date at bottom

Once the signed documents have been received, the tax return will be reviewed and lodged with the ATO.

Kind Regards,

xxx

**Attach completed tax return and Sub Dec to email. Ensure Sub Dec is for the correct year*

**If tax return is a payable and not a refund amend "refundable amount" to "payable amount"*

This above can also be found on the remote server under Ezytax(T:) > Emails > Email Templates > 2 Completed Tax Return Email Template

To Upload Documents:

- 1) File section > Click on **Add Files > Highlight My Computer > Choose Files from My Computer > Desktop > PRINT > Choose CORRECT template >**

Choose CORRECT ELS/BAS/Document for signing > **Open**

- 2) File section > Click on **Add Files > Templates > Choose CORRECT template > Attach** – This is for the relevant Substantiation Declaration or Trust Account Authority > **Next**
- 3) This generates the PDF. Scroll to where the client needs to sign on ELS/BAS > RHS Toolbar > **Signature fields > Select and drag Signature box to where signature is required > Resize** – If multiple signatures required, Right Click > **Copy Field** and drag to where the next signature is required.
- 4) For Client's Name, Date, Title – RHS Toolbar > **Signers Info Fields > Select appropriate field and drag box to where required > Resize accordingly.**
- 5) For Trust Account Authority, enter the total amount to be taken from refund – RHS Toolbar > **Data Fields > Drag Text Input to fee area > Right Click > Edit > Tick Read Only > Enter fee amount in Default Value (eg: \$198.00) > OK**
- 6) CHECK to ensure all signatures have been allocated a signing box.
- 7) Click **Send**

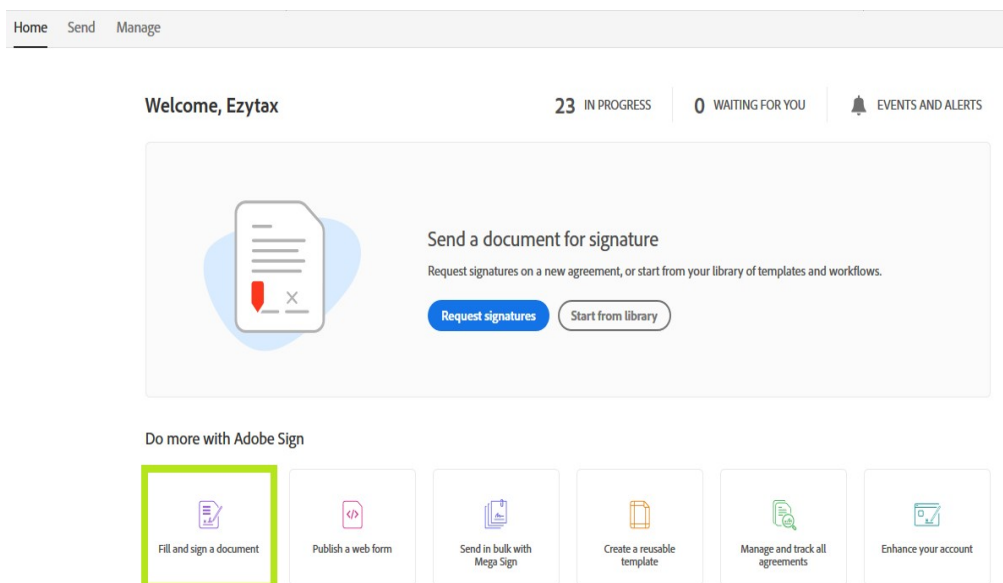
To Check If Email Has Been Sent or Signed By Client

- 1) **Home > In Progress >** Enter client's email address in search bar on top right hand corner
- 2) Will show if sent and what stage the email is in. If waiting on signatures or if it is completed.

How To Use Adobe Sign At Station Without Sending Email

This function can be used if the printer is not working and allows you to get documents signed without having to email the client.

- 1) On the Home page of Adobe Sign in the left hand bottom corner is the **“Fill and sign a document”** button.



- 2) Go to **“Agreement Name”** and change to Client's name > click **“Add Files”**.

Fill & Sign

Upload or choose files to sign and fill out yourself.
After signing, you will be able to save, download or send them to others.

Files Add Files

Drag & Drop Files Here

Options

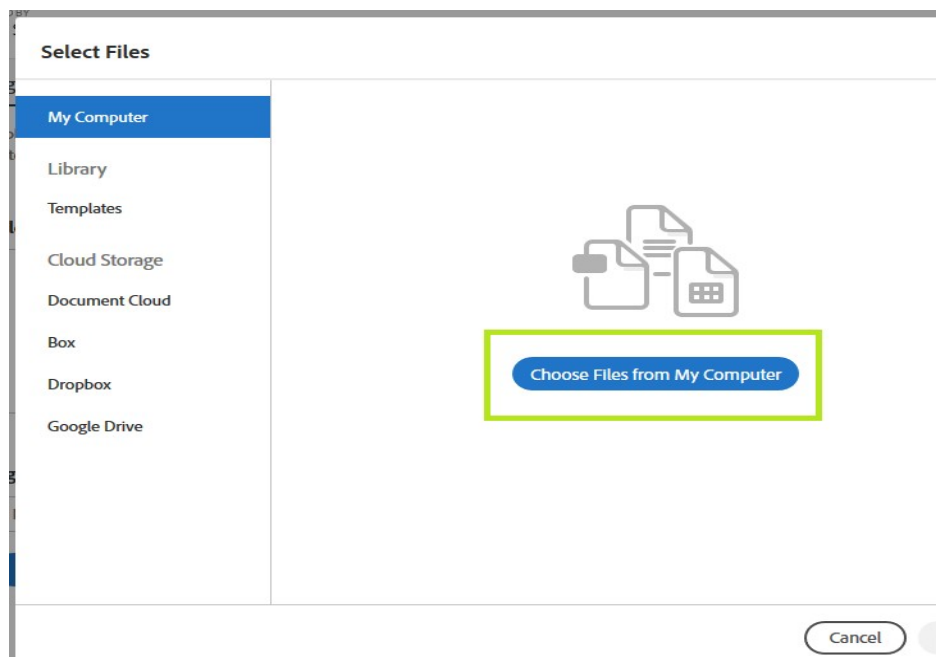
Password Protect

Agreement name

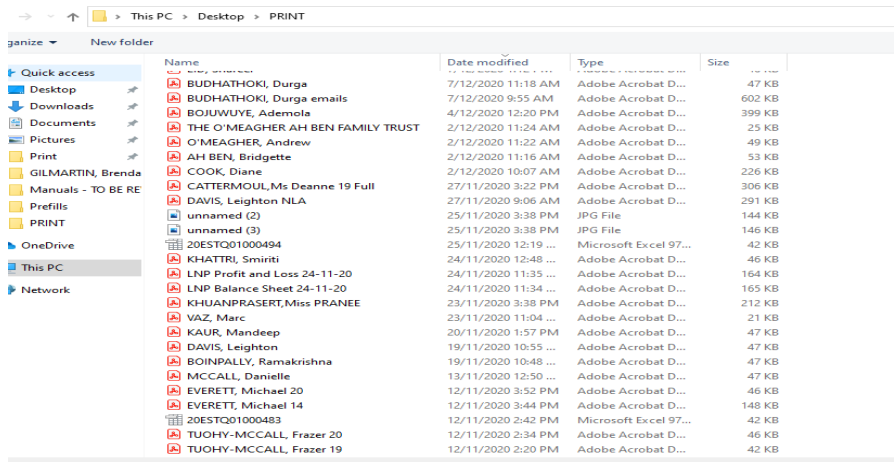
Enter agreement name

Next

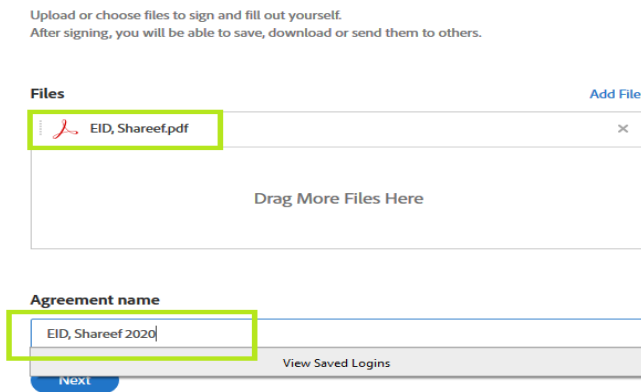
- 3) Click on “**Choose Files From My Computer**”. The files need to be on the local desktop before you are able to upload them.



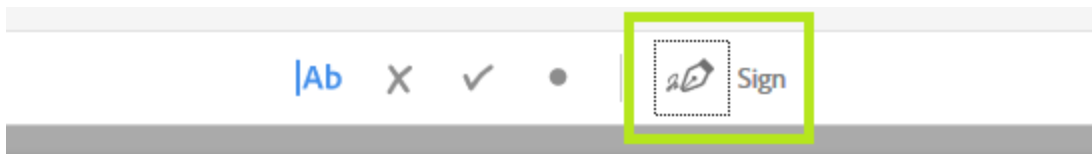
- 4) Select the file you need and press **Open**.



- 5) You should now have the selected file uploaded and the correct agreement name. Click **“Next”**



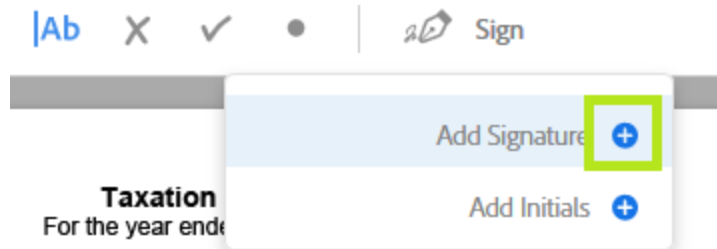
- 6) You will see above the ELS a toolbar, select the **“Sign”** icon.



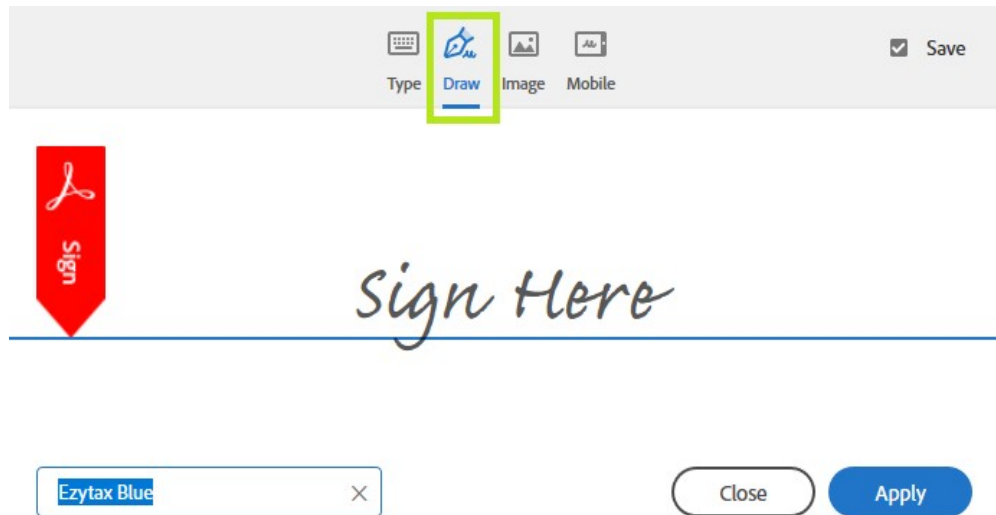
- 7) There will be past signatures which you need to remove by clicking on the **“Negative”** button.



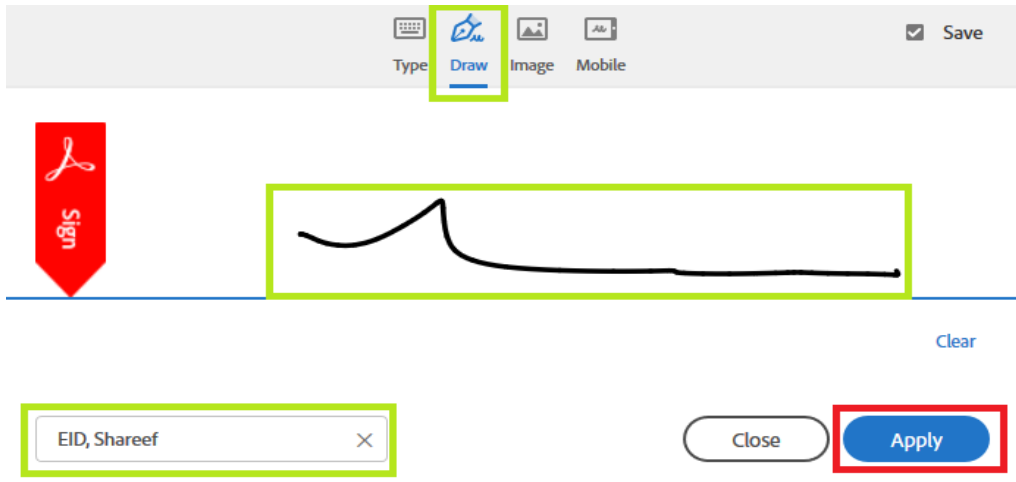
8) After old signatures are removed click on **“Add Signature”**.



9) Click **“Draw”**




- 10) After selecting “**Draw**”, change the name in the bottom left hand corner from Ezytax Blue to Client's name. Turn laptop around for client to sign. If they do it wrong press clear and do it again. After they have signed press the “**Apply**” button.



- 11) Once you press “**Apply**” a signature will appear drag down and resize in the appropriate box.

* the agent is authorised to lodge the tax return

Important The tax law imposes heavy penalties for giving false or misleading information.

Signature  Date

PART B **ELECTRONIC FUNDS TRANSFER CONSENT**

This declaration is to be completed when an electronic funds transfer (EFT) of a refund is requested and the tax return is being lodged through an approved ATO electronic channel.

The declaration must be signed by the taxpayer prior to the EFT details being transmitted to the Tax Office. If you elect for an EFT, all details below must be completed.

Important: Care should be taken when completing EFT details as the payment of any refund will be made to the account specified.

Agent's reference number:

Account name:

I authorise the refund to be deposited directly to the specified account as above.

Signature Date

- 12) Additional signatures: go to the toolbar and click on “**Sign**” and on the Client's


signature. Drag and resize in the second box.



13) To date the document - click on the date box and type in the date.

the agent is authorised to lodge this tax return.

Important: The tax law imposes heavy penalties for giving false or misleading information.

Signature  Date

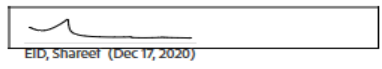
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This declaration is to be completed when an electronic funds transfer (EFT) of a refund is requested and the tax return is being lodged through an approved ATO electronic channel.

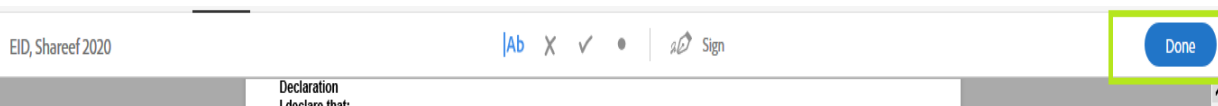
The declaration must be signed by the taxpayer prior to the EFT details being transmitted to the Tax Office. If you elect for an EFT, all details below must be completed.

Important: Care should be taken when completing EFT details as the payment of any refund will be made to the account specified.

Agent's reference number:
Account name:
I authorise the refund to be deposited directly to the specified account as above.

Signature  Date

14) Once signatures and dates are entered, press the “Done” button (top right had corner).



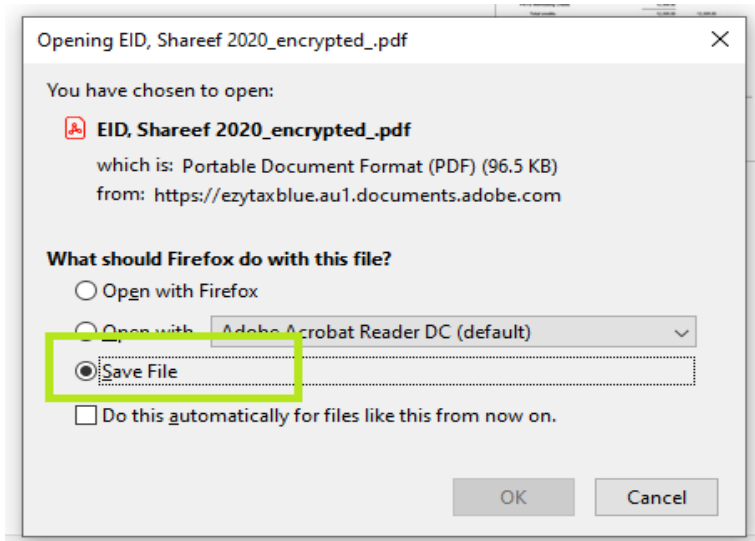
15) Save the document by clicking on the “Download a Copy” and “Save File”



You have successfully signed the agreement
"EID, Shareef 2020"

Next steps for this agreement:

- Send a Copy
- Download a Copy
- Manage This Agreement
- Sign Another Agreement



16) The document will also show in the **Completed** section and can be saved if you did not save it in the previous step.

Your agreements Filters Search for agreements and users...

STATUS	Completed	RECIPIENTS	SENDER	TITLE	MODIFIED
In Progress (23)	<input type="checkbox"/>	EID, Shareef	Me	EID, Shareef 2020	12/17/2020
Waiting for You (0)	<input type="checkbox"/>	Ezytax Blue			
Completed					

17) Upload the signed document to the Client's folder on the server from "Downloads" on the local computer.

