

KENNEDY CROSS

STRATEGIC ADVICE | TAX | ACCOUNTING

WELCOME TO COLLABORATE

the safe & secure way to share and access your documents



INTRO

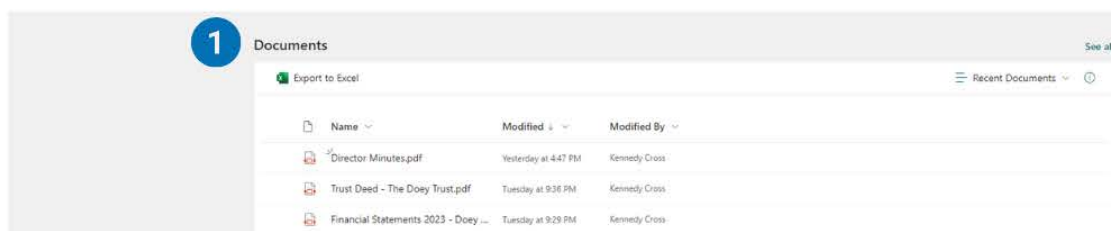
At Kennedy Cross, we make managing your finances a breeze with our client platform 'Collaborate', putting all your financial information right at your fingertips. Access your accounts or upload documents for the team, all in one convenient, safe and secure place.

VIEWING DOCUMENTS

When you log into the collaborate platform your recent documents will appear on the home screen, for quick, secure and easy access, you can also navigate directly to your folders from the navigation bar.



1 your recent documents from home screen



2 access all your documents from the navigation bar

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UPLOADING DOCUMENTS

You can easily and securely share any documents with us using your **Upload Folder**. Simply drag and drop into the **Upload folder**, within 15 minutes this will sync securely with our system and notify us that you've shared documents with us.

TIP: You'll know it's successfully shared when the file no longer appears in the Upload Folder.

The screenshot shows the Kennedy Cross Collaborate Site interface. At the top left is the 'KC' logo. The main header reads 'Kennedy Cross Collaborate Site' with navigation links for 'Home' and 'Documents'. Below the header is a toolbar with icons for 'Share', 'Copy link', 'Sync', 'Download', 'Export to Excel', and 'Automate'. The main content area shows a breadcrumb trail: 'Documents > Doey Dollhouses Pty Ltd-157547725'. Below this is a table of folders:

Name	Modified	Modified By
2023	Tuesday at 9:29 PM	Kennedy Cross
2024	Yesterday at 4:47 PM	Kennedy Cross
Upload	Monday at 9:15 PM	Kennedy Cross

1 your Upload Folder to share documents with us securely

2 your document folders for you to securely access any previously shared documents

ACCESSING DOCUMENTS

Your documents are always available for you so you can log in at anytime to securely access what you need when you need to.

TIP: You can quickly and securely access the collaborate platform from our homepage, we also recommend bookmarking the link for easy future access.