

## S&A Partners | WCO Portal Instructions

### Signing in:

1. To access your new portal go to <https://portal.snawco.ca/login>

*Note:* when your portal was re-created recently, a welcome email was sent to your email address that included your username (your email address) and a temporary password and this weblink. If you didn't receive a welcome email, please reach out to our admin team at [info@snapartners.ca](mailto:info@snapartners.ca) to request it.

### **The look of the welcome email:**

#### Subject line:

Portal Credentials

#### Body of the email:

Welcome to our Web Portal. **If you have created a portal in the past, please note that we will need you to update your information with us.** We have set up your access as follows:

Username: [info@snapartners.ca](mailto:info@snapartners.ca)  
Password: LySz8GsBrZ

Please click on the link below to access the Portal.

To access the portal, please go to <https://portal.snawco.ca>

Enter your Username and Password from above. After your initial login you will be prompted to change your Password to something meaningful to you. Your Username will remain your email address.

Should you have any difficulties please contact us at: [portal@snawco.ca](mailto:portal@snawco.ca)

### **Portal Administrator**

S&A / WCO Chartered Professional Accountants  
Oakville: 136 Cross Avenue, Oakville, ON L6J 2W6  
Guelph: 3-512 Woolwich Street, Guelph, ON N1H 3X7

2. Enter your email address into the **"Email"** box.
3. **Copy the temporary password from your welcome email and paste it into the "Password" box:**

## Login to S&A Partners | WCO Portal

\*Email

\*Password

Remember Me

**SUBMIT**

- Click **SUBMIT**.
- The portal will now ask you to re-set your password to your own private one (something you'll remember). Enter the same new password twice:

## S&A Partners | WCO Portal

\*Password

\*Confirm Password

**SUBMIT**

- Click **SUBMIT**.
- The portal will tell you that 'Your password was successfully created.'
- Now you are in your new portal.

### Example of what your portal should look like:

S&A Partners | WCO Portal

000 Test Client

Folders Lists

+ ✎ 🗑️

- Portal
  - Public
    - Public
    - Private

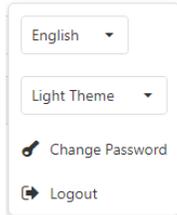
📄

🔍 Search

Document Name ▼ Type

### Changing password:

1. If you ever need to re-set your current password, go to the top-right hand corner of your portal screen:



2. Click **Change Password**.
3. The portal will now ask you to enter your new password. Enter it twice:

### **S&A Partners | WCO Portal**

\*Password

\*Confirm Password

**SUBMIT**

4. Click **SUBMIT**.
5. The portal will tell you that your 'Password Changed Successfully.':  
**portal.snapartners.ca says**  
Password Changed Successfully.
6. Click **OK**.

### Uploading documents:

1. Once logged into your portal, click on the **Public** or **Private** folder.

\*'Private' folder = if multiple email addresses have access to your portal (e.g. you and your assistant or bookkeeper) and you wish to keep some documents viewable only by you and us, you can upload to/download them from the Private folder.

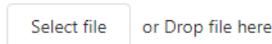
#### **Public folder example:**



**Private folder example:**

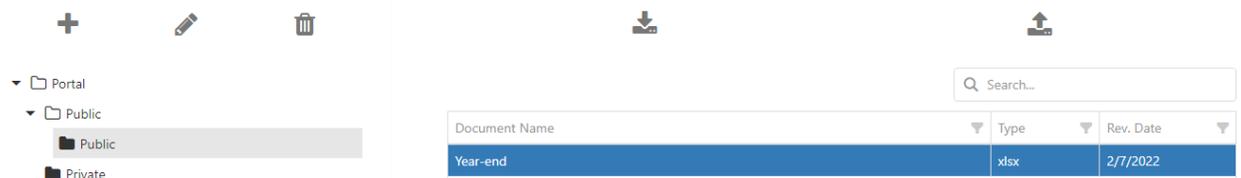


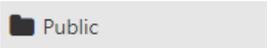
2. Click on the upload icon 
3. Click **'Select file'** > select the file to upload from your computer or drag and drop your document into the 'Upload Document(s)' box:  
  



4. Click .
5. Your file has now been uploaded onto your portal and we will receive an email notification to [info@snapartners.ca](mailto:info@snapartners.ca) to download it:

**Example of an uploaded file:**



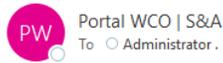
6. The Public or Private folder will show black to represent that there is a file present:  

7. We will copy your uploaded document(s) onto our system and you will receive a confirmation email or phone call of receipt.

**Downloading documents:**

1. You received an email notification that there is a document in your portal from us for you to download. The email will specify the folder name and the file name (so you know where to find it):

**Notification email example:**

Portal Upload Notification



The following file(s) have been uploaded to the Portal:

Folder: Public  
File(s): Year-ends (1).xlsx

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2. Click on <https://portal.snawco.ca> to log in.
3. The file can either be located in the Public or Private folders.

You will receive an email notification every time a document is uploaded here for you to download & the email will specify the folder containing new documents + the folder will appear black on your portal like this:



4. Click on the black folder > click on the file to be downloaded > click the download icon



**Example:**



| Document Name | Type | Rev. Date |
|---------------|------|-----------|
| Year-end      | xlsx | 2/7/2022  |
| Year-ends (1) | xlsx | 2/7/2022  |

The selected document will now download onto your computer.

8. These file(s) will remain on your portal for 365 days unless you would like for us to delete them, in which case please let us know by reaching out to our admin team at [info@snapartners.ca](mailto:info@snapartners.ca).



### Troubleshooting issues:

1. For help or guidance, please feel free to reach out to our admin team at [info@snapartners.ca](mailto:info@snapartners.ca).