If you receive an email with the subject "Please approve this document" or something similar, this means that your accountant is sending you documents that require your digital approval.

In doing so, your accountant has created a task for you to action. The task will be listed on the **Tasks**tab of your portal. If there are a number of people in your portal, only those assigned to the task will be able to view the task.

To approve or reject a document from an email invitation

* If you are the only users assigned to digitally approve a document—You won't be able to change the status of a document once it's approved. If it's necessary to do so, you'll need to contact your advisor.
* If there are multiple users assigned to digitally approve a document—If the associated task is still open or in progress, and not all assigned users have digitally approved the document yet, then one of the users who have not yet approved the document can reject it. This will reject the whole approval task for all approvers.

1. Click the **View Task** button in your email. Your portal will open in your browser.

The message at the bottom of the email lets you know the email address to use to access your collaborative portal.

1. Click the appropriate **Sign in** button to use either your existing MYOB account or your Google account.

If you don't have an MYOB account, you can create one. Click **Sign up** and see [How do I create an MYOB account?](https://help.myob.com/wiki/x/AhuEAQ#expand-HowdoIcreateanMYOBaccount) for more info.

1. Enter your username and password, then press **Enter**.  
   You'll automatically gain access to the correct portal (as you may be a user of a number of portals) with the task details displaying for the specific task that your advisor has assigned to you.
2. Click each attached document to open and carefully review them.

If a document requires a signature, indicated by a **Signature** icon (), you need to view the document before you can access the **Reject** and **Approve** buttons.

When you open a document that needs a signature, a **Viewed** icon () appears next to the document. The icon only appears for you, not your accountant.

1. When you've finished reviewing each document, return to the task details.
2. Depending on your review of the documents, either click:

Approve

 or

Reject

It may take a few moments for your digital signature to be included in your document. A message will let you know when your document is signed and ready.

What happens next?

* Your advisor will be notified by email if you've rejected any one of the documents associated with the task.
* If you're the only person who needs to approve the documents, and you approve them, the task is moved to your completed tasks list. Your advisor will be notified by email.
* If others need to approve the documents, the documents are not considered completely approved until **everyone** has approved them. When everyone has approved all the documents within the task, the task is moved from your open tasks to your completed tasks list. If one person from the nominated signees rejects a document, then the task will have a status of rejected. Your advisor will be notified by email after the documents have been approved and if a document is rejected.
* You can see who has been assigned to approve a document from the tasks details. You can also track who has and hasn’t approved a document.