AutoBooks — Client Portal Guide

AutoBooks — a product of AumBiz

Version	1.0	**Effective date**	2026-08-14
Document owner	Product	**Approved by**	Managing Director
Review frequency	After material product change	**Classification**	For clients

Document history

Version	Date	Author	Changes
1.0	2026-08-14	Product	Simple guide for SME portal users (English). Kiswahili version is a separate file.

> **Note**
> This page is for **you**, the business sending documents to your accountant. You can switch the screens to Kiswahili from Settings in the portal. You do not need to know accounting software.

1 What this portal is

Your accountant uses AutoBooks to collect your invoices, receipts, and bank statements. You get a small website — **AutoBooks**, labelled Client portal — where you upload those files.

You will **not** see ledgers, trial balance, or Tally. That is your accountant's workspace.

2 Step 1 — Wait for the invitation email

Your accountant (the firm administrator) sends you an invite.

- Look in your inbox (and spam) for an email about AutoBooks.
- Click the link in that email.
- If the link has expired, ask your accountant to send the invite again. Do not try to "sign up" as a new firm.

3 Step 2 — Set your password

You will see a page titled **Set your password**.

1. Type a password of **at least 8 characters**.
2. Type it again to confirm.

3. Save.

Do not share this password. Your accountant does not need it.

4 Step 3 — You are in the portal

After you save the password, AutoBooks takes you to the **Client portal**. The name of your business appears at the top.

Later visits: go to the AutoBooks login page and enter the **same email** and the password you chose. Forgotten password: use **Forgot password** on the login screen.

If you leave the portal idle for about 30 minutes, you will be signed out. Just log in again.

5 What to do each time you have papers

1. Log in to the portal.
2. Upload your files (drag and drop, or choose files).
3. Check that they appear in your list.

You can send:

- Photos of receipts and invoices (PNG, JPEG, WebP)
- PDF files
- Excel or CSV statements

Maximum size: **25 MB per file**.

Your accountant sees the files on their side. You do not wait on a "processing" screen — just confirm the upload appeared.

6 What else you can see

- **Your file list** — including a note if your accountant deleted a file ("Deleted by your accountant").
- **Notifications** — for example when the accountant adds or removes a file.
- **Your accountants** — the people at the firm assigned to you.
- **Profile photo** — optional, from the account menu.
- **Settings** — switch between English and Kiswahili.

7 What you should not expect

- You cannot edit the books.
- You cannot send files to Tally.
- You cannot see other businesses.
- WhatsApp chat inside AutoBooks is not available yet. If you need to talk to your accountant, use the channel you already use with them.

8 Common questions

Q. I did not get the email.

A. Check spam. Then ask your accountant to resend the invite.

Q. The link says it expired.

A. Ask your accountant for a new invite. Old links stop working.

Q. Can I use the same login as my accountant?

A. No. You have your own email and password, for the portal only.

Q. I uploaded the wrong file.

A. Tell your accountant. They can remove it; you will see that it was deleted.

Q. Is my data only for my accountant?

A. Yes — your files belong to your firm's workspace. Other AutoBooks customers cannot see them.

Kiswahili: see *Mwongozo wa Lango la Mteja (AutoBooks)*.