

USER GUIDE

1. How to Register

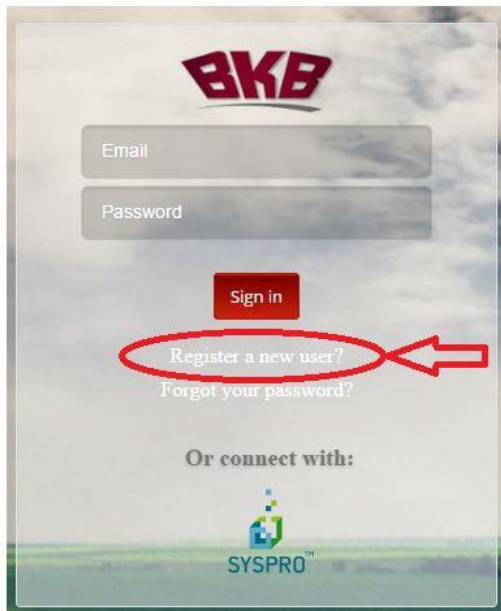
a. On the BKB website (www.bkb.co.za) you will find

'Our Client Portal – BKB'

Please click on the "Client Portal" link.



b. Click on "Register a new user?" and complete the required information.



Register

Create a new account.

Personal Details

First Name	<input type="text"/>
Last Name	<input type="text"/>
Password	<input type="password"/>
Confirm Password	<input type="password"/>
Email	<input type="text"/>
Confirm Email	<input type="text"/>
Phone	<input type="text"/>

Passwords must have:

- at least 6 characters.
- at least one non letter or digit character.
- at least one lowercase ('a'-z').
- at least one uppercase ('A'-Z').

ex. Bkb@123

c. Choose which role you want to register for:

Customer – BKB account holders

Staff – BKB Staff only

Bookkeeper – Non BKB Account holders i.e. Financial Officers / Auditors. Account holders have the option to grant access to third parties from his own portal profile, provided the third party has also registered.

Role

Register me as

Staff

Customer

Bookkeeper

Account Holder Details

- d. Complete BKB Account Holder Details – **only** when Staff or Customer Role is chosen.

Account Holder Details

Account holder name	<input type="text"/>
Account holder email	<input type="text"/>
Account holder phone	<input type="text"/>
Account number	<input type="text"/>

- e. Type the required Captcha and click “Register”.



Generate new Captcha

Answer

Register

- f. NOTE: Once you have completed the registration an email will be sent to the BKB data capturing department, who will verify and finalise your registration.

2. How to login: (After registration)

Step 1

Enter the email address used for registration.

Step 2

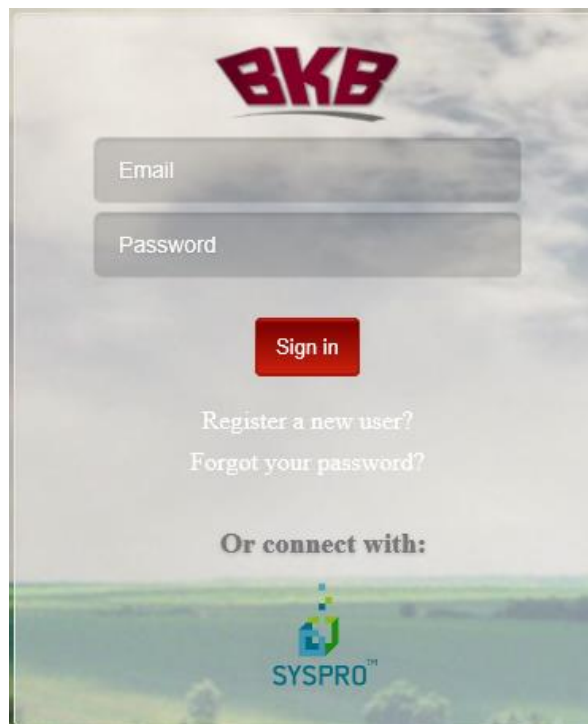
Enter the password created upon registration.

Step 3

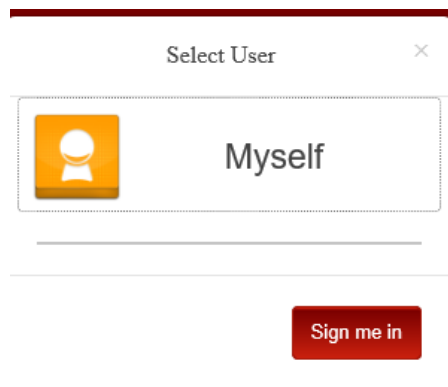
Click on the **Sign in** button.

Step 4

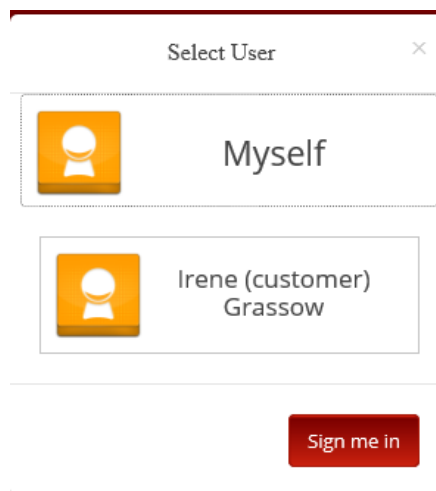
Click on “Myself” and then on “Sign me in”, alternatively, should you be acting for / bookkeeper click on the user you require to access and then sign in.



Customer



Bookkeeper

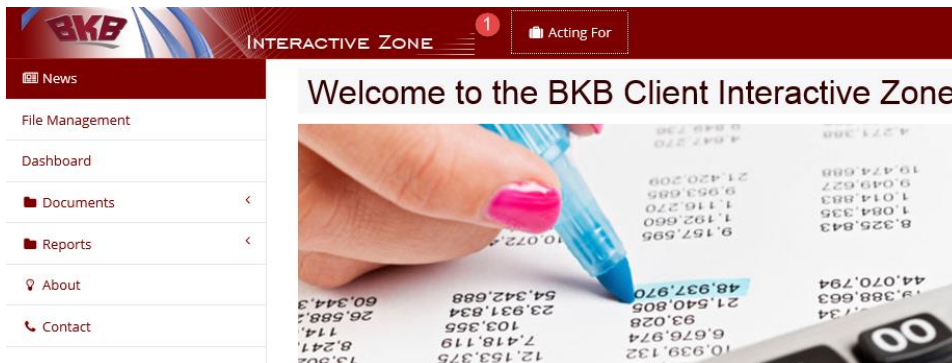


3. How to grant access to a third party – guide

The account holder, while logged into the interactive portal website needs to follow these steps:

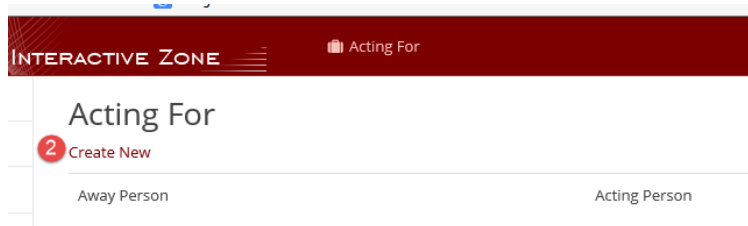
STEP 1

Click on 'Acting For' **1**



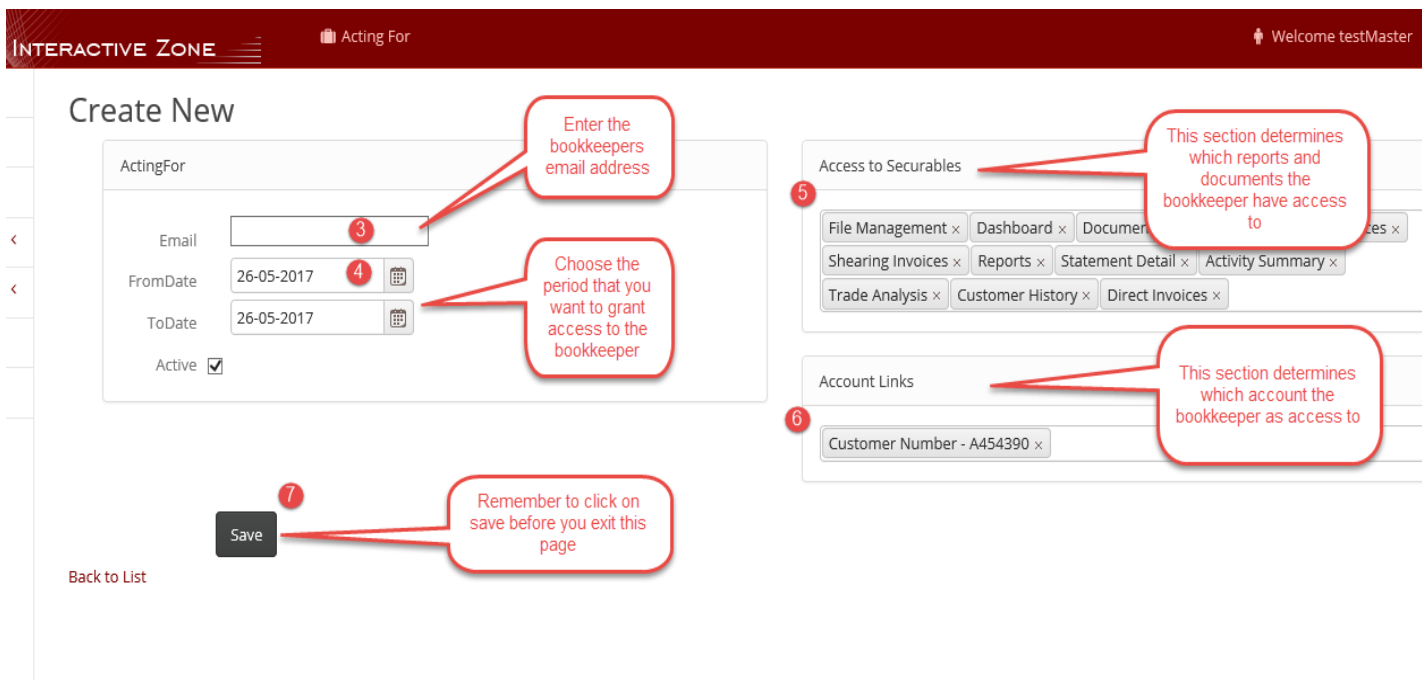
STEP 2

All of your 'Acting For' persons will be listed. To add a new one click on **2** Create New



STEP 3

Fill in the required values as below and then click on Save.



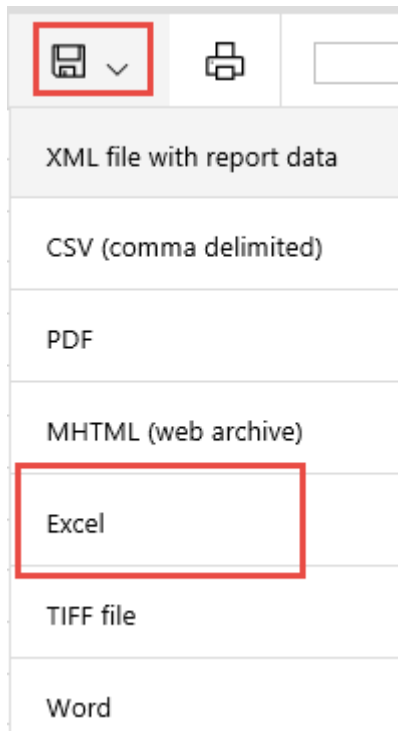
NOTE: The 'Acting For' client (bookkeeper) must first register on the portal prior to setting him up as an 'Acting For'. The role Bookkeeper needs to be selected.

4. How to export report data

Run the report and after the data is displayed click on the down arrow next to the disk.



A list of formats are displayed that you can choose from.



The file will now be available in the selected format.