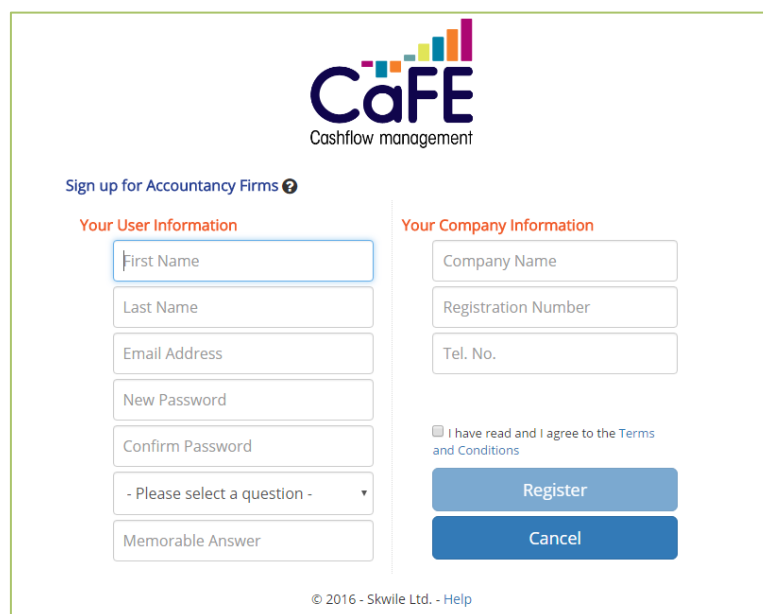
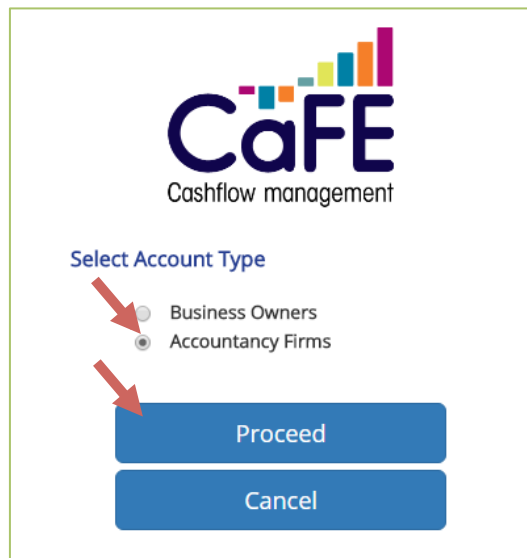




As of 17/11/2016

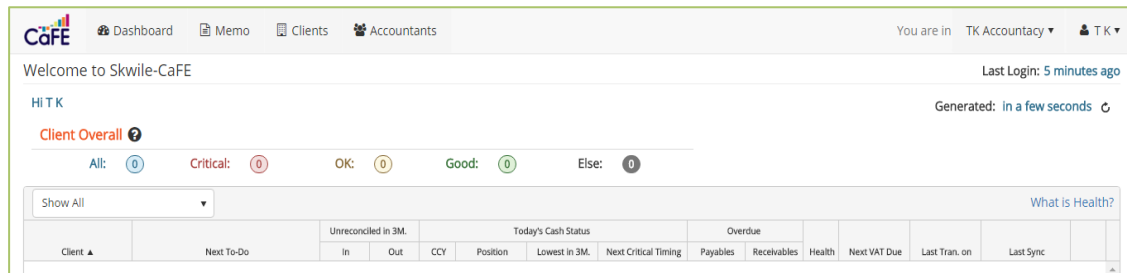
## How to add your clients in your CaFE account to manage your portfolio

- 1) In the sign up page, please make sure you select “Accountancy Firm” then proceed. Once you sign up, you will receive a confirmation email to your registered email address.



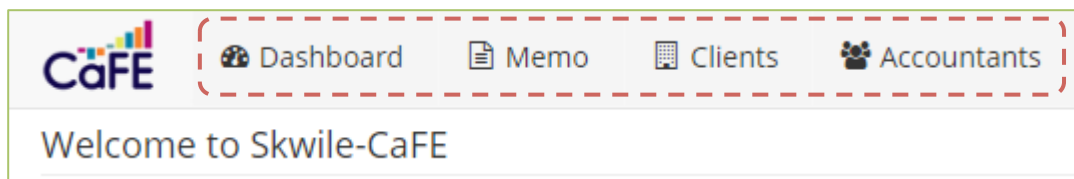
2) Once confirmed, you will be able to log in to your account at <https://www.skwile-cafe.com/Account/Login>

3) The screen below is the one you see once logged in.

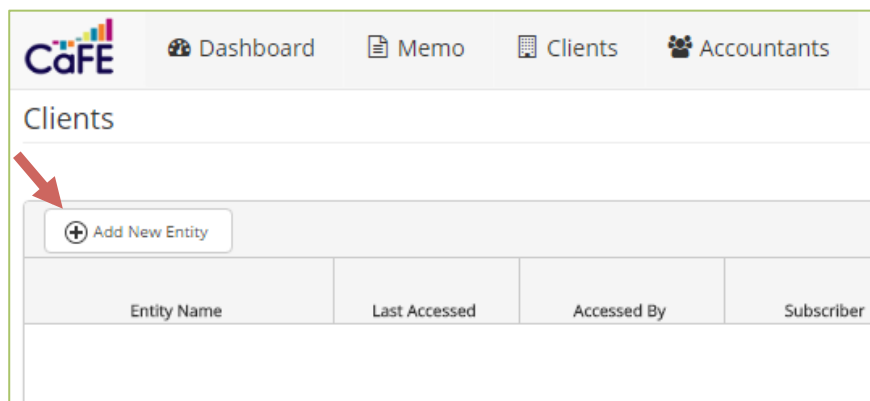


And you now have 4 menus on the top:

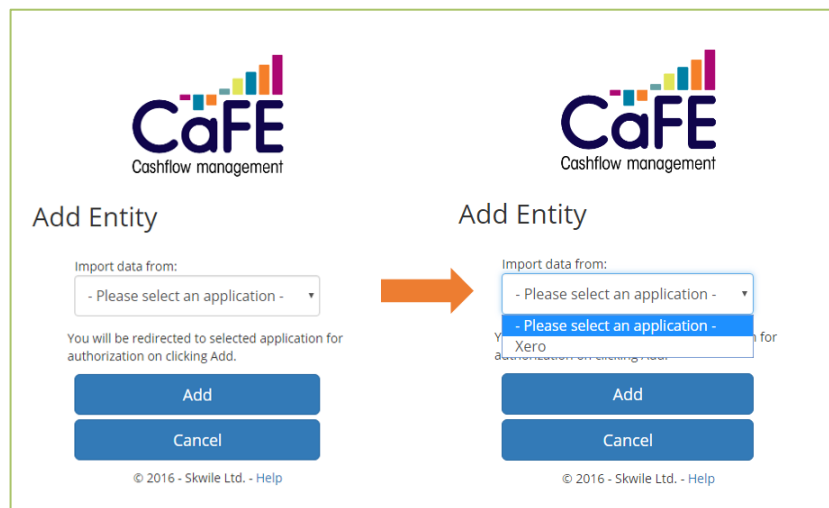
[Dashboard, Memo, Clients and Accountants]



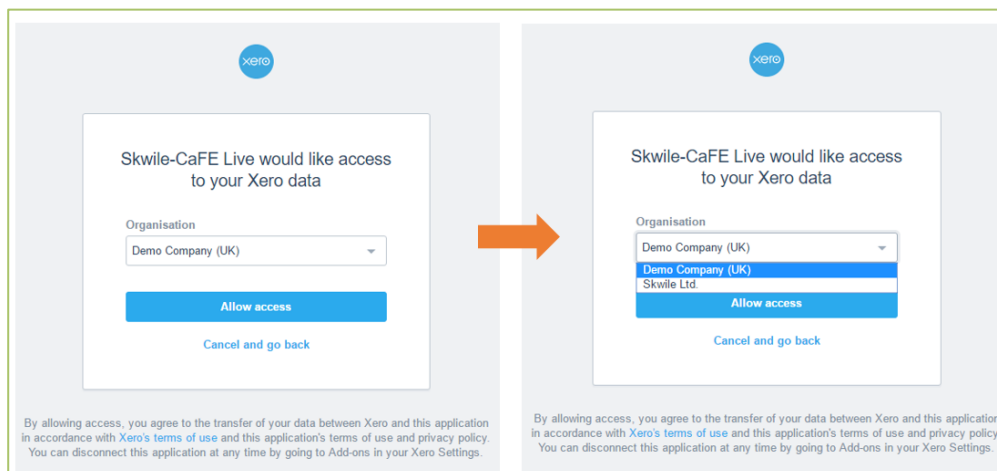
4) Now you go to “Clients” then you click “Add New Entry” button on the top left corner in the grid view.



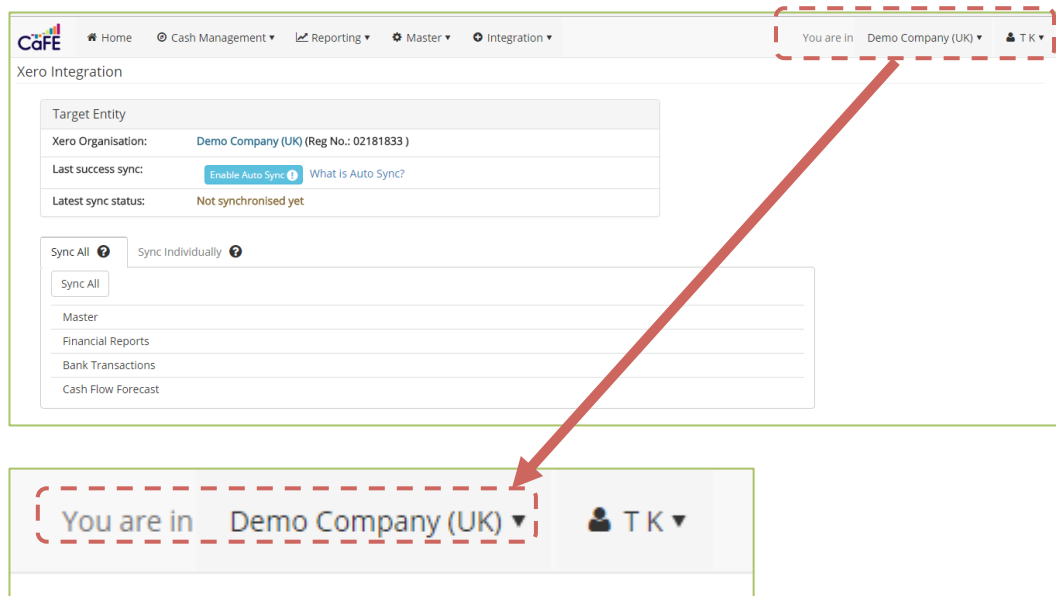
Now you are redirected to the screen below where you need to select the accounting application that you are connecting to CaFE. Then click “Add” button.



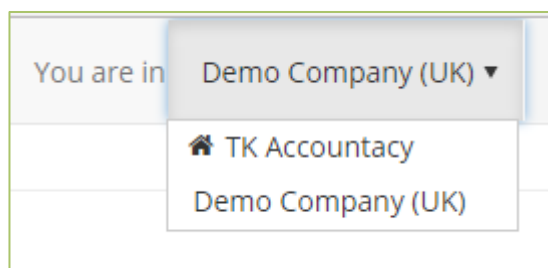
5) Then you see the screen below. Please note that the screen below is the case you select Xero. You can now select your clients from the dropdown box. You can select your clients one by one hence you can of course choose which clients you would like to have/not to have in CaFE. Click “Allow Access” to complete this process.



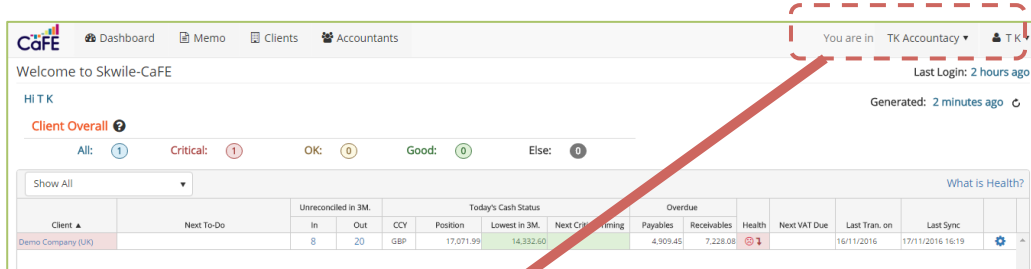
6) You are now redirected to the screen below. Please note that you are now in the CaFE account of the client you selected in Step 5). On the top right corner, you see a dropdown box next to “You are in”. By using this dropdown box, you can go to i) another client’s CaFE account (if added already), or ii) your own account.



In this example below, you have one client and your own account (TK Accountancy) displayed in the dropdown box. More clients you add, more clients you will see and be able to manage in here. Once you select your own accountancy firm, you will be redirected to your CaFE account.



7) Now you have the client you added in “Dashboard”



CaFE Dashboard Memo Clients Accountants

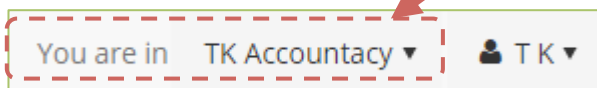
Welcome to Skwile-CaFE

Hi T K

Client Overall

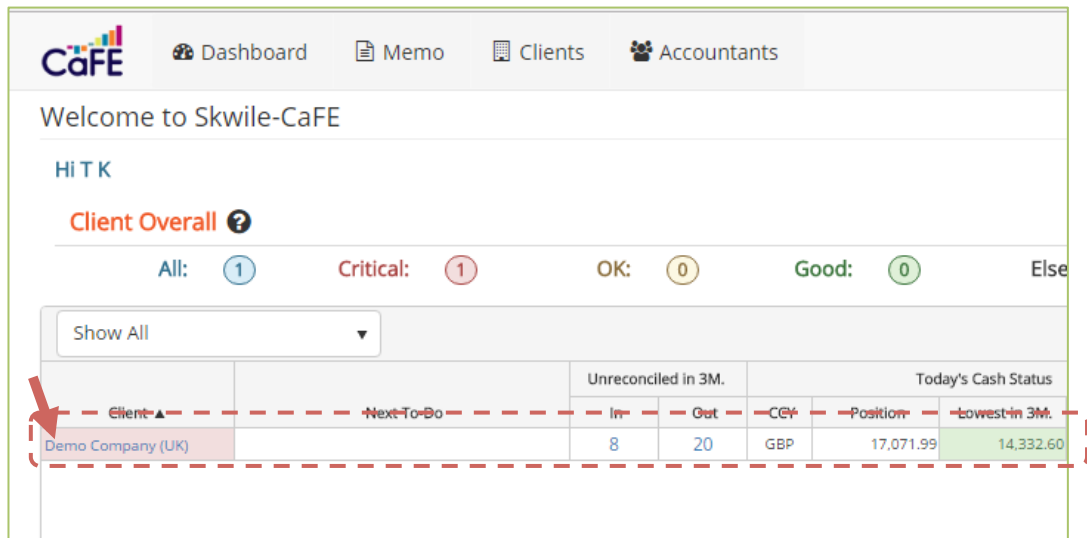
All: 1 Critical: 1 OK: 0 Good: 0 Else: 1

Client	Next To-Do	Unreconciled in 3M.		Today's Cash Status		Overdue		Health	Next VAT Due	Last Tran. on	Last Sync
		In	Out	Lowest in 3M.	Next Cl. in 3M.	Payables	Receivables				
Demo Company (UK)		8	20	17,071.99	14,332.60	4,909.45	7,228.08	1	16/11/2016	17/11/2016 16:19	



You are in TK Accountancy

TK



CaFE Dashboard Memo Clients Accountants

Welcome to Skwile-CaFE

Hi T K

Client Overall

All: 1 Critical: 1 OK: 0 Good: 0 Else: 1

Client	Next To-Do	Unreconciled in 3M.		Today's Cash Status		Health	Next VAT Due	Last Tran. on	Last Sync
		In	Out	Lowest in 3M.	Next Cl. in 3M.				
Demo Company (UK)		8	20	17,071.99	14,332.60	1	16/11/2016	17/11/2016 16:19	