CANOPY – CLIENT PORTAL

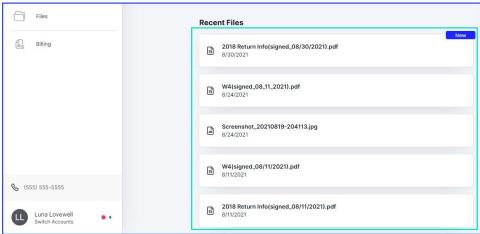
The client portal allows you to communicate securely with your accountant. To get started, **login to your custom portal** provided in your invitation email. After logging in, you will be taken to the home screen of the client portal. The home tab allows quick access to some of your most often used functions and provides a quick snapshot of current tasks that need completing.

1. On the To-Do list, click on an available task to complete.

• The **To-Do** list on the home page will only show your **five** (5) with the soonest due date.

3	To-do
Home	Submit OWLs Due Sep 16, 2022
To-do	Paperwork Due Apr 12, 2023
Files	Client Survey Due Jul 15, 2023
	Due Oct 24, 2024
	Ê Form

2. The *Recent Files* list will show the 5 most recently uploaded files to your portal by you and your accountant.



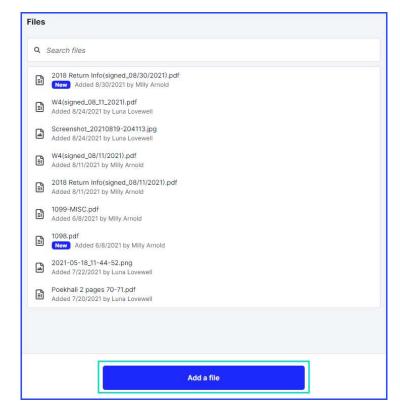
3. The *To-do* tab will show a list of all tasks assigned to you by your accountant.

3	To-do
Home	Bubmit OWLs Due Sep 16, 2022
To-do	Paperwork Due Apr 12, 2023
Files	Client Survey Due Jul 15, 2023
~~ <i>4</i>	Lore Notes Due Oct 24, 2024

4. The *Files* tab will show all of the files kept on your account.

3	Files	
Image: Home Image: To-do Image: Files Image: Eligible Billing	Q Search files Image: Search files 2019 Return Info(signed_08/20/2021);pdf Image: Search files Image: Search files Image: Search files Search files Image: Sea	
% (555) 555-5555		
Luna Lovewell Switch Accounts	Add a file	

1. You can click **Add a file** to upload a new file to your account.



5. The *Billing* tab will show your outstanding balance, and list all of your invoices and payment history.

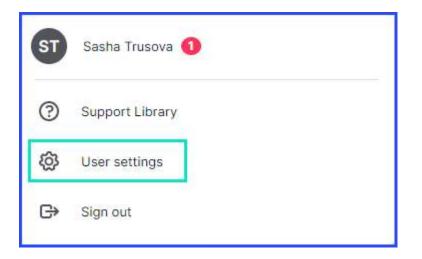
• If your accountant has enrolled in **Canopy Payments**, you will be able to make payments towards your balance and invoices. If you would like this functionality, please reach out to your accountant and encourage them to look into **Canopy Payments**.

	Billing	
Home	\$2,613 Outstanding b	
To-do	Invoices Payme	ent history
Files	\$ 590.48 Due Aug 31, 2021	0091
Billing	\$ 474.76 Due Aug 31, 2021	0092
	\$348.40 Due Sep 15, 2021	0095
email@firm.co	\$ 599.80 Due Oct 15, 2021	0093
1 Infinite Court Starbase, Texas 78520 , (787) 777-7670	\$600.00 Due Nov 15, 2021	0094
S Avery Simmons	Make a payr	nent

6. You can click on your *profile* in the bottom left to navigate to your *settings*.



1. Select **User settings** from the pop-out menu.



- 2. You can change any of your information using the provided boxes.
 - **Please note:** To change your name, you will need to ask your accountant to change the name in their system as well so that all legal documents are updated accordingly.

First name*		Last name*	
Luna		Lovewell	
Email*			
avery.simmons+stagel	una@canopytax.c		
Phone	Ext.		
(555) 555-5555			
Time zone America/Denver (Moun	tain Time) 👻		
Reset password			
Two Factor Authentic		rd, you'll be asked for a second verification step. Learn more	