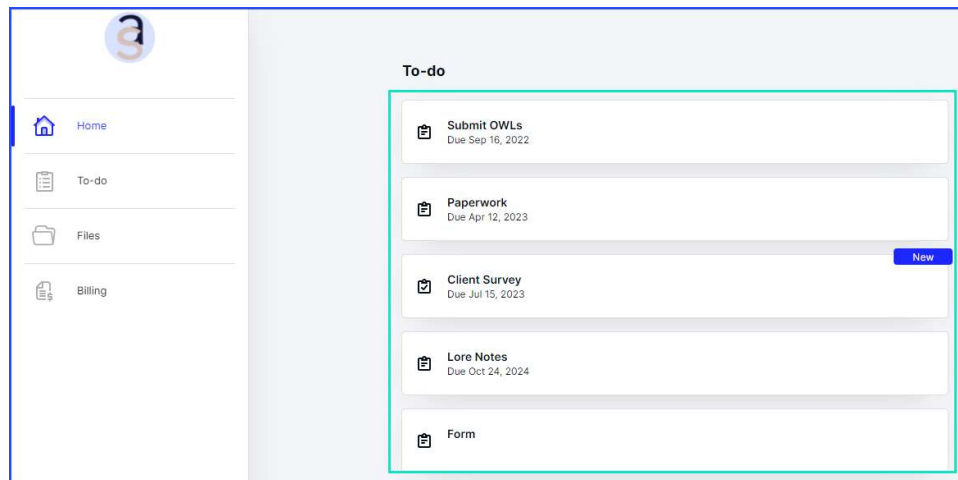


# CANOPY – CLIENT PORTAL

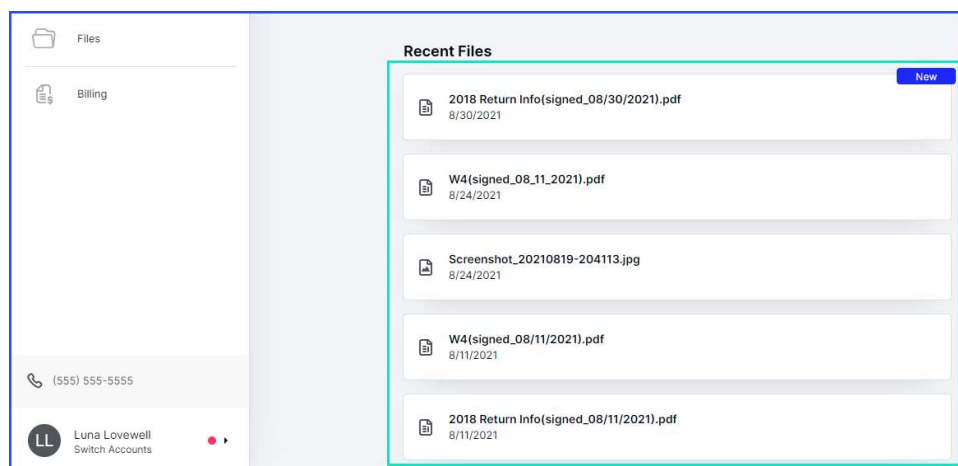
The client portal allows you to communicate securely with your accountant. To get started, **login to your custom portal** provided in your invitation email. After logging in, you will be taken to the home screen of the client portal. The home tab allows quick access to some of your most often used functions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

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

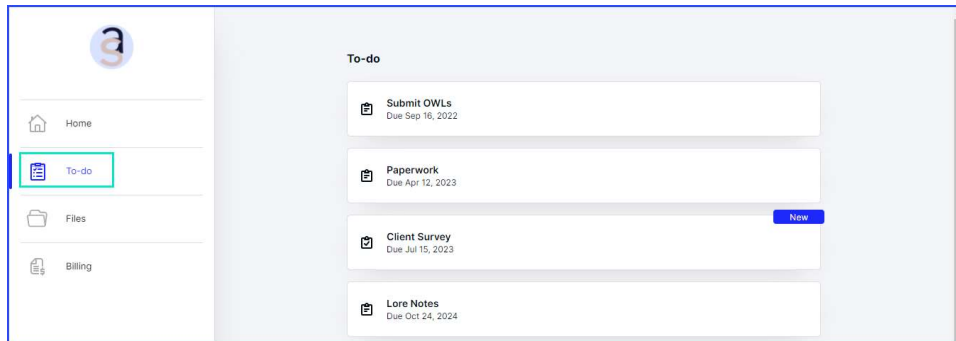
- The **To-Do** list on the home page will only show your **five** (5) with the soonest due date.



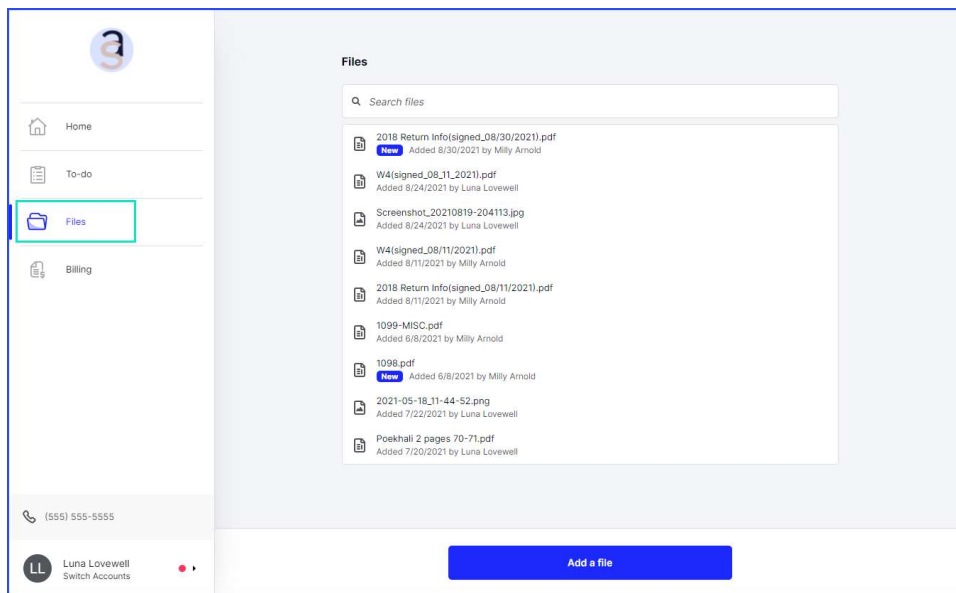
## 2. The *Recent Files* list will show the 5 most recently uploaded files to your portal by you and your accountant.



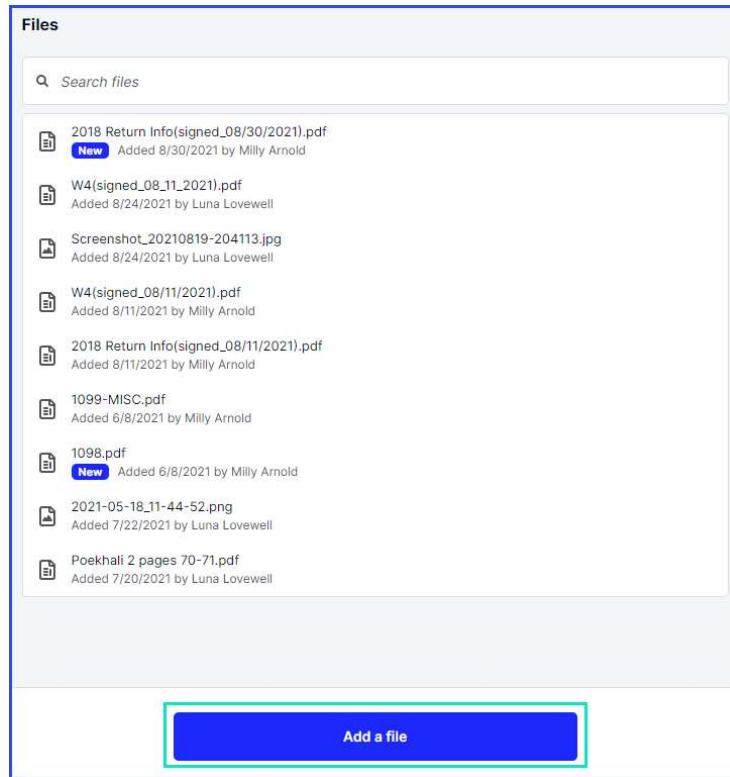
### 3. The *To-do* tab will show a list of all tasks assigned to you by your accountant.



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

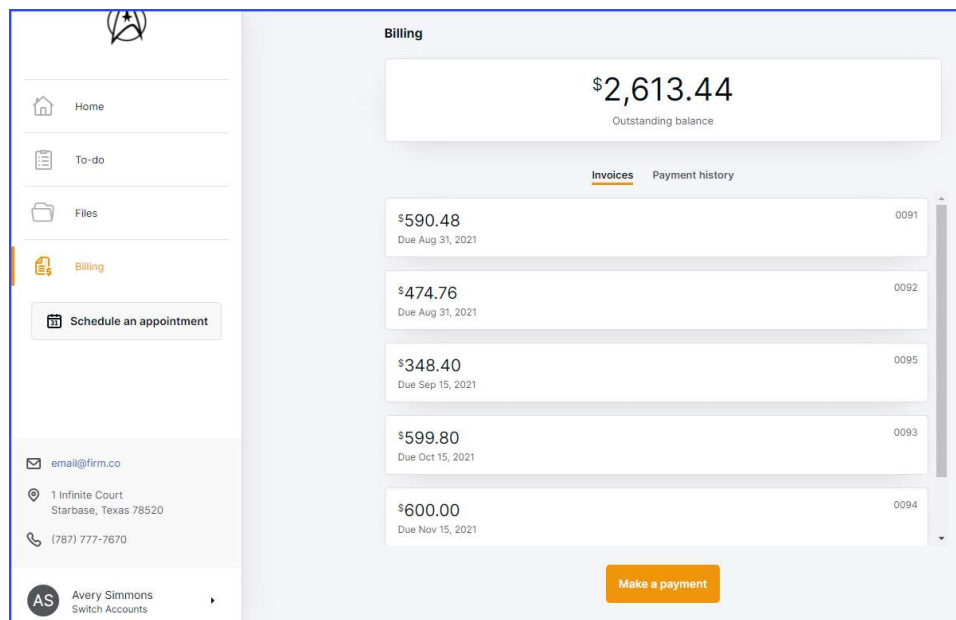


1. You can click **Add a file** to upload a new file to your account.

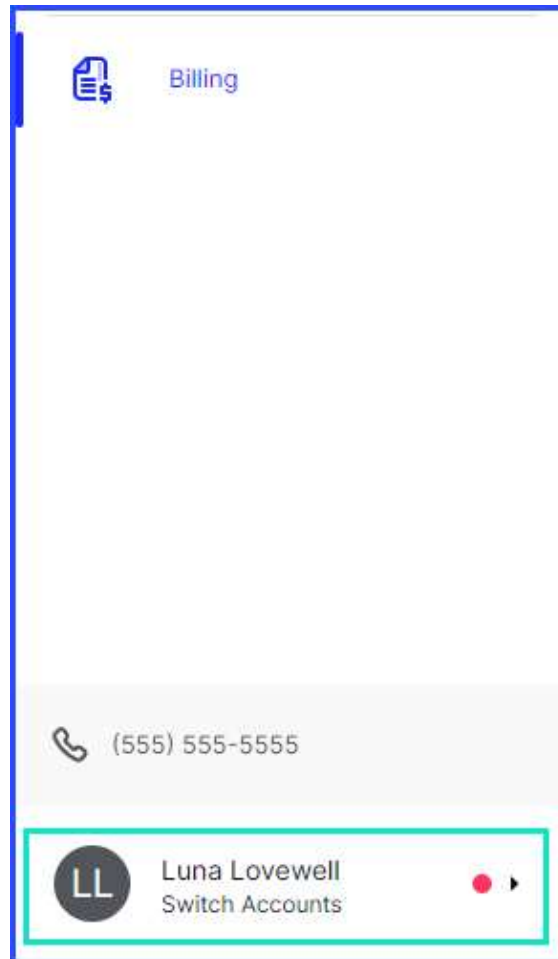


## 5. The **Billing** tab will show your outstanding balance, and list all of your invoices and payment history.

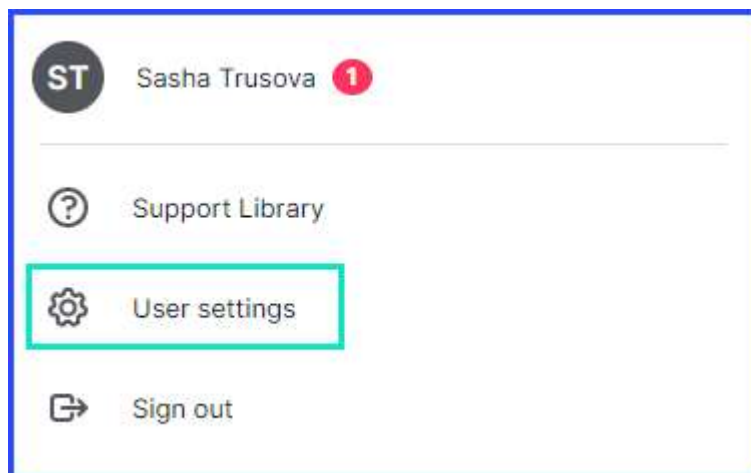
- If your accountant has enrolled in **Canopy Payments**, you will be able to make payments towards your balance and invoices. If you would like this functionality, please reach out to your accountant and encourage them to look into **Canopy Payments**.



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.

### User Settings

First name*	Last name*
<input type="text" value="Luna"/>	<input type="text" value="Lovewell"/>
Email*	
<input type="text" value="avery.simmons+stigeluna@canopytax.c"/>	
Phone	Ext.
<input type="text" value="(555) 555-5555"/>	<input type="text"/>
Time zone	
<input type="text" value="America/Denver (Mountain Time)"/>	
<input type="button" value="Reset password"/>	
<input type="checkbox"/> Two Factor Authentication Additional security. After entering your password, you'll be asked for a second verification step. <a href="#">Learn more</a>	
<input type="button" value="Save changes"/>	<input type="button" value="Undo"/>