

# Complete a Client Request

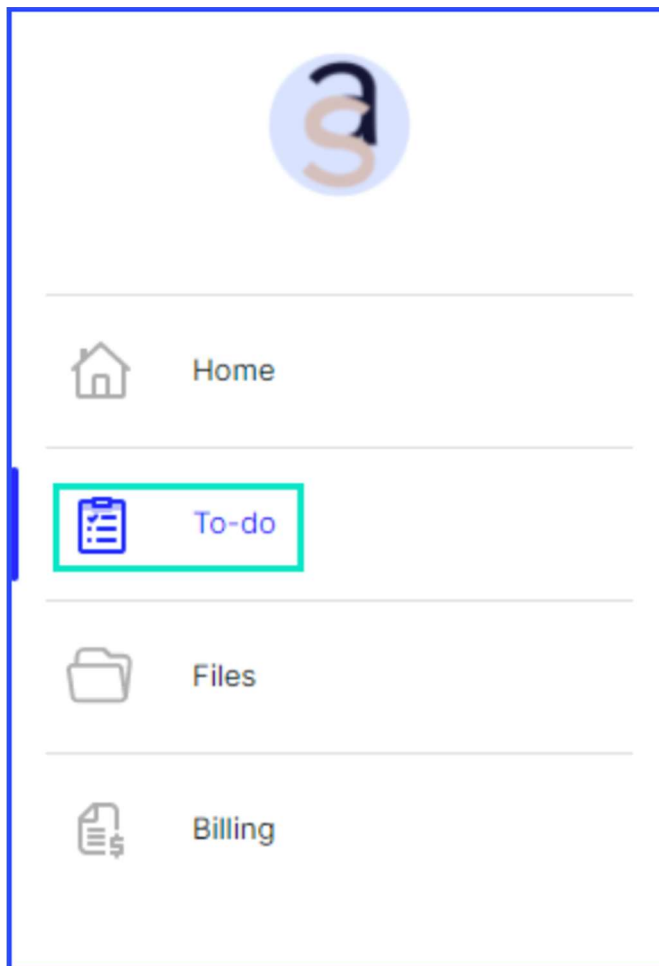
Any client requests sent by your accountant can be completed from within the Client Portal. Client requests are often sent so that you can upload documents or provide quick information for your accountant. All client requests will show up on your **To-do** list and are indicated by a



clipboard icon.

To get started completing a client request, log in to the [Client Portal](#).

1. Navigate to your *To-do* list on the left-side column.




2. Select a *Client Request* from the To-do list. Client requests

are represented by a clipboard




icon.

**To-do**

 **Submit OWLs**  
Due Sep 16, 2022

**New**

 **3 Months Bank Statements**  
Due Feb 08, 2023


**New**

3. Review any notes or instructions provided by your accountant.



Arnold Accounting Assistants

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 **Ministry Passport Info**

Please send me your ID so we can get this all filed for you.  
Sent by Milly Arnold on Jul 22, 2021



Thanks!  

Mark as complete

4. Type a comment to respond to your accountant.

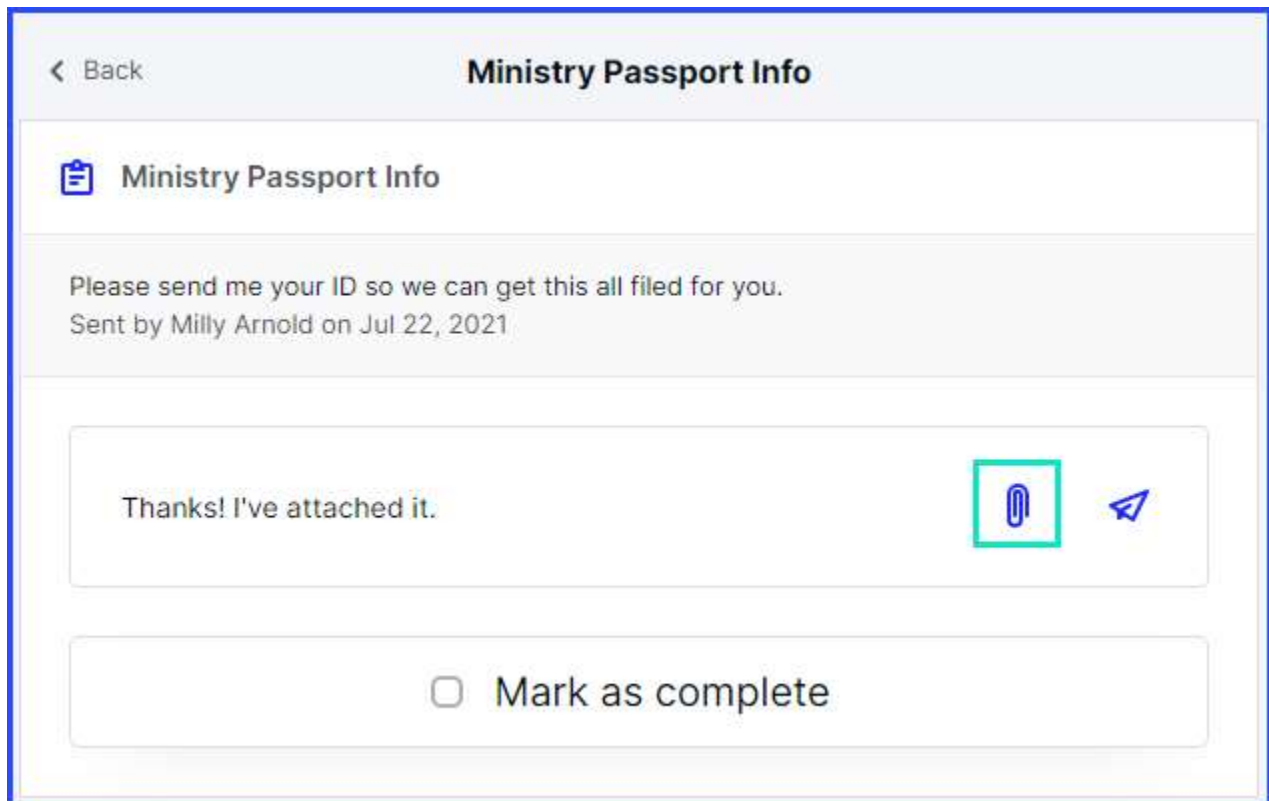
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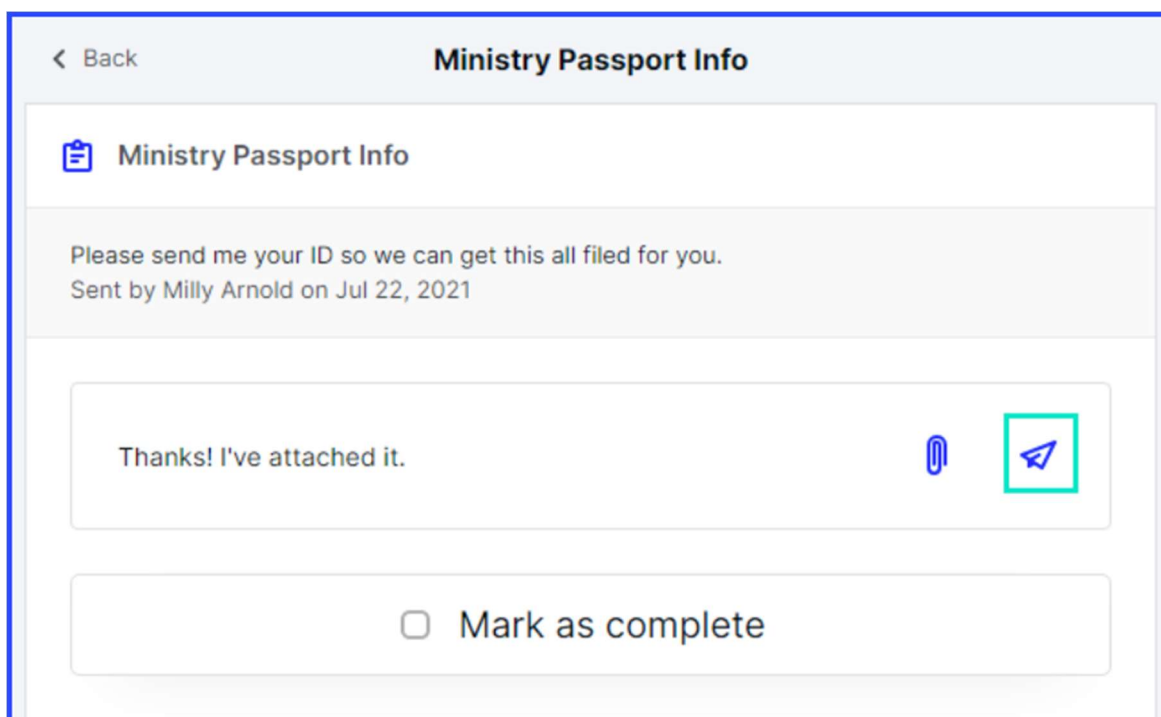
Thanks! I've attached it!  

Mark as complete

5. Click on the *Paperclip* icon to upload a file with your comment.



6. To send your response to your accountant, click on the *Send* icon, depicted by a paper airplane.



7. Once you have completed the client request, be sure to click on the checkbox to *Mark as complete*.

