## **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



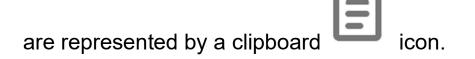
clipboard icon.

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.

	3		
	Home		
ā	To-do		
	Files		
	Billing		

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



To-do		
Ê	Submit OWLs Due Sep 16, 2022	New
Ē	3 Months Bank Statements Due Feb 08, 2023	New

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

Arnold Accounting Assistants	K Back Ministry Passport Info	
Home	Ministry Passport Info	
To do	Please send me your ID so we can get this all filed for you. Sent by Milly Arnold on Jul 22, 2021	
Files	Thanks!	
Es Billing		U. ~
	Mark as complete	

4. Type a comment to respond to your accountant.

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! I've attached it.	0	Ø
Mark as complete		

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

< Back	Ministry Passport Info	
🖹 Ministry Pas	ssport Info	
Please send me yo Sent by Milly Arnol	our ID so we <mark>can get this all filed for you.</mark> Id on Jul 22, 2021	
Thanks! I've a	attached it.	
	<ul> <li>Mark as complete</li> </ul>	

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

< Back	Ministry Passport Info		
🖹 Ministry Pa	assport Info		
	your ID so we can get this all filed for you. old on Jul 22, 2021		
Thanks! I've	attached it.	0	\$
	<ul> <li>Mark as complete</li> </ul>		

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

Ministry Passport Info			
Please send me your ID so we can of Sent by Milly Arnold on Jul 22, 2021		you.	
			Jul 22, 2021 at 1:04 pr
		ß	Thanks! I've attached it.
2021-05-18_11-44-52.p	ng X		
0 1	Mark as con	nplete	