Log in to the Client Portal Mobile App

In order to begin using the Client Portal, you will need to download the Client Portal app. Search for "Canopy Client Portal" in the [Apple App Store](#) or [Google Play Store](#).

our accountant will send you an invite via email to join the Client Portal. Upon receiving this email, you will need to create a Canopy account. To get started, click **Create account** in the email invitation from your accountant.

1. Fill out the required information:

2. Click the checkbox to agree to the *Terms of Service* and *Privacy Policy*.

3. Navigate to the Client Portal app **on your device and enter your login credentials.**
4. Tap *Log in***.**
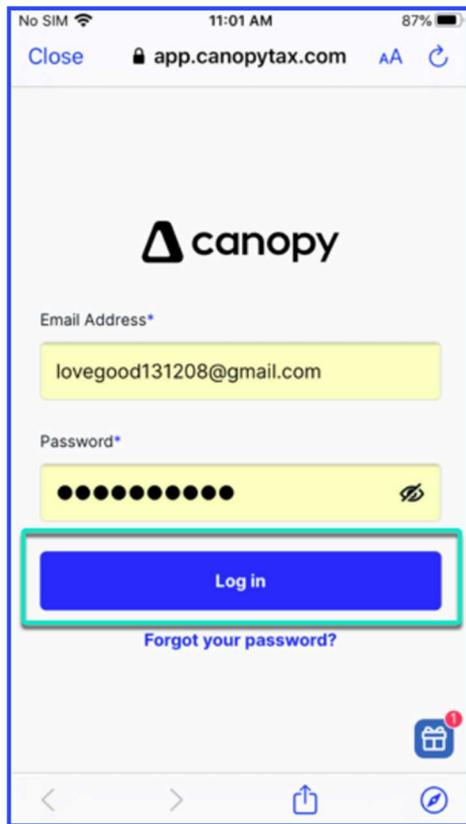
Navigating the Client Portal First Login Experience

Upon logging into the Client Portal for the first time, you will need to walk through a few steps to set basic preferences in the app. To begin, click **Get Started**.
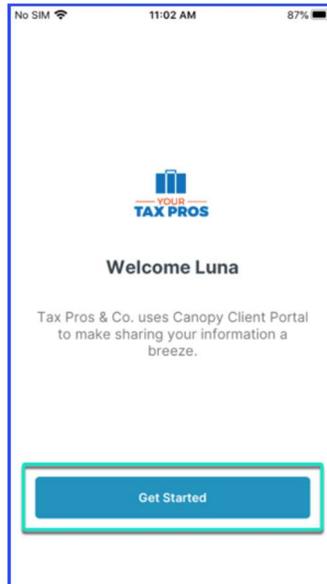
1. Specify whether or not you want to receive notifications from the Client Portal app.