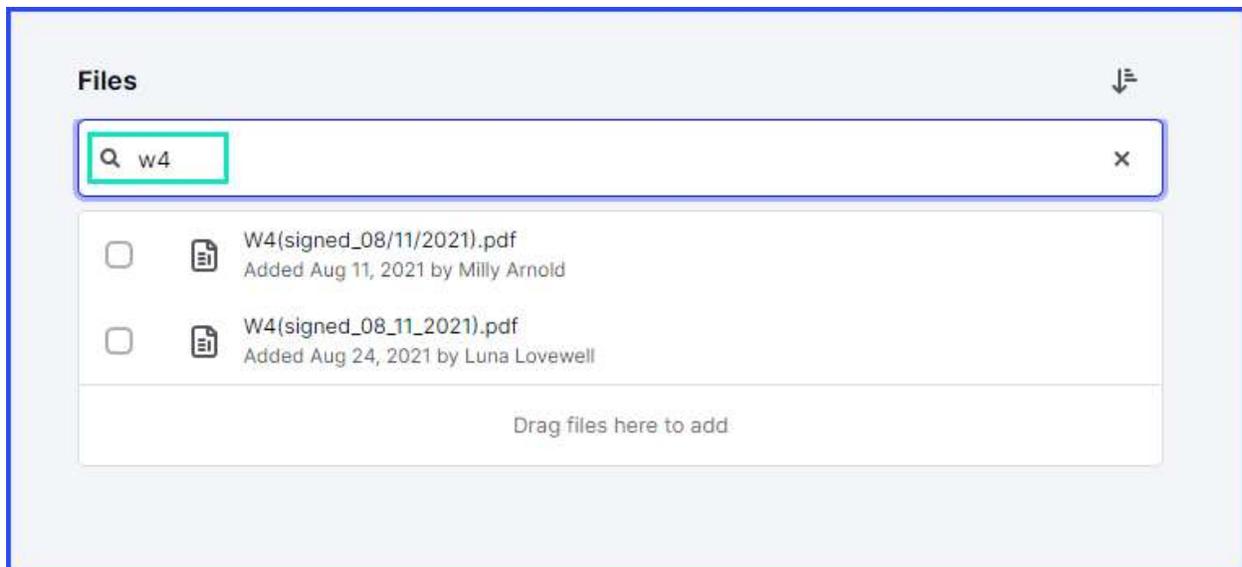


CANOPY – CLIENT PORTAL

Navigate the files tab | Client Portal

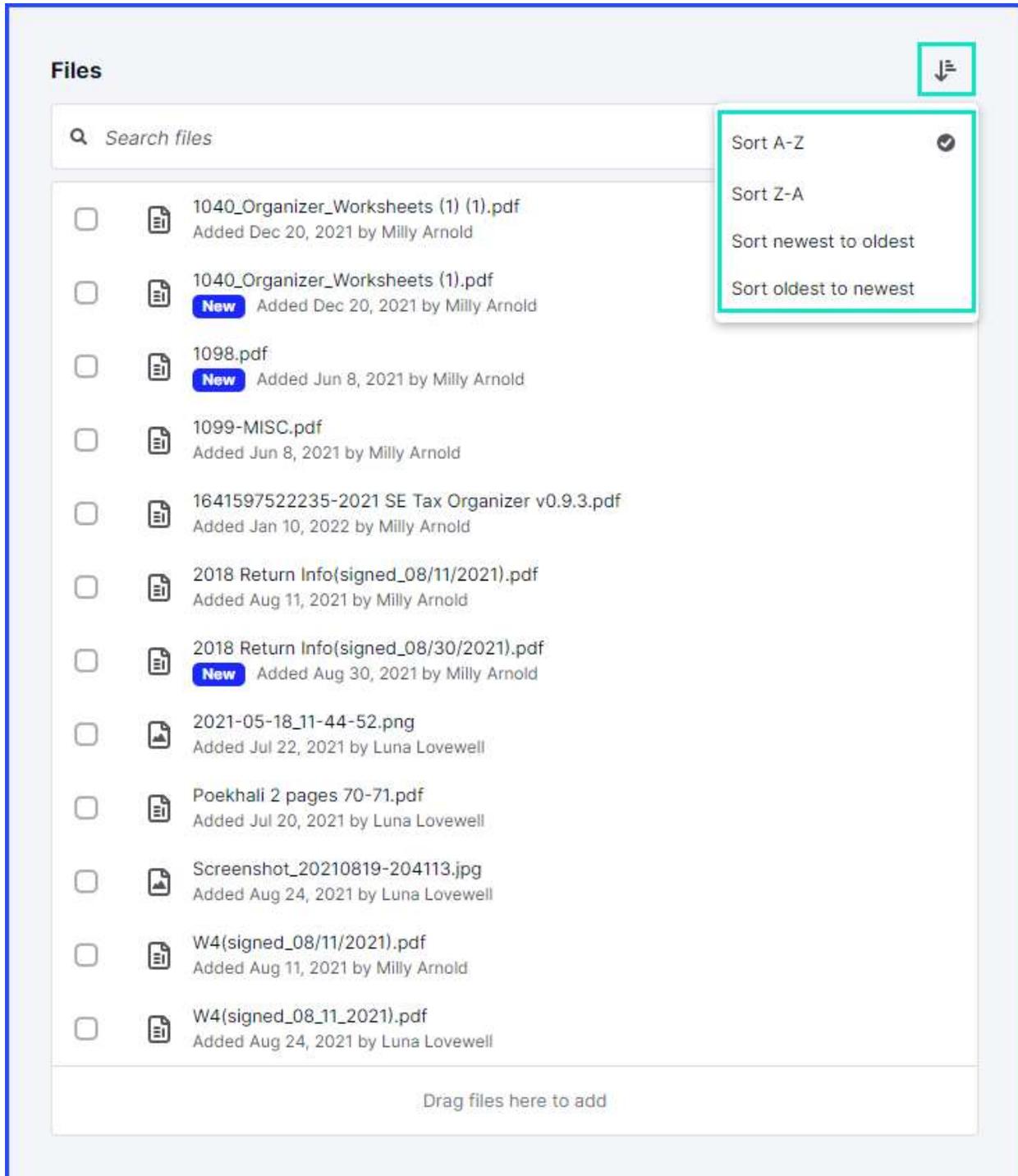
All of your accessible files are stored alphabetically on the **Files** tab. If some files are not visible, it may be because your accountant has revoked access. You can drag and drop files to upload them to your account, view, download, and sort files. This guide will help orient you to the Files tab.

1. Search for a file name using the provided search box.



2. Click on the *Filter* icon to select a filtering option for the listed files.

- **Options include:** Sort A-Z, Sort Z-A, Sort newest to oldest, or Sort oldest to newest.
- By default, Files will be sorted alphabetically from A to Z.



The screenshot displays a file management interface with a list of files and a sorting dropdown menu. The interface is titled "Files" and includes a search bar labeled "Search files". The file list contains 14 items, each with a checkbox, a file icon, a filename, and a "New" badge. A dropdown menu is open, showing four sorting options: "Sort A-Z" (selected), "Sort Z-A", "Sort newest to oldest", and "Sort oldest to newest".

File Name	Added	By
1040_Organizer_Worksheets (1) (1).pdf	Dec 20, 2021	Milly Arnold
1040_Organizer_Worksheets (1).pdf	Dec 20, 2021	Milly Arnold
1098.pdf	Jun 8, 2021	Milly Arnold
1099-MISC.pdf	Jun 8, 2021	Milly Arnold
1641597522235-2021 SE Tax Organizer v0.9.3.pdf	Jan 10, 2022	Milly Arnold
2018 Return Info(signed_08/11/2021).pdf	Aug 11, 2021	Milly Arnold
2018 Return Info(signed_08/30/2021).pdf	Aug 30, 2021	Milly Arnold
2021-05-18_11-44-52.png	Jul 22, 2021	Luna Lovewell
Poekhali 2 pages 70-71.pdf	Jul 20, 2021	Luna Lovewell
Screenshot_20210819-204113.jpg	Aug 24, 2021	Luna Lovewell
W4(signed_08/11/2021).pdf	Aug 11, 2021	Milly Arnold
W4(signed_08_11_2021).pdf	Aug 24, 2021	Luna Lovewell

Drag files here to add

3. Click on the in-line checkbox to select a file.

- You can select multiple files by clicking each associated check box.
- With multiple files selected, click **Download selected** to download a zipped file.

The screenshot displays a file management interface titled "Files". At the top right, there is a download icon. Below the title is a search bar with the placeholder text "Search files". The main area contains a list of files, each with a checkbox on the left, a file icon, the filename, and the date and user who added it. The first three files have their checkboxes checked, and these three rows are highlighted with a red border. At the bottom of the list is a "Drag files here to add" area. At the bottom of the entire interface is a button labeled "Download selected" with a download icon, which is also highlighted with a red border.

Checkbox	File Name	Added	User
<input checked="" type="checkbox"/>	1040_Organizer_Worksheets (1) (1).pdf	Dec 20, 2021	Milly Arnold
<input type="checkbox"/>	1040_Organizer_Worksheets (1).pdf	Dec 20, 2021	Milly Arnold
<input checked="" type="checkbox"/>	1098.pdf	Jun 8, 2021	Milly Arnold
<input checked="" type="checkbox"/>	1099-MISC.pdf	Jun 8, 2021	Milly Arnold
<input type="checkbox"/>	1641597522235-2021 SE Tax Organizer v0.9.3.pdf	Jan 10, 2022	Milly Arnold
<input type="checkbox"/>	2018 Return Info(signed_08/11/2021).pdf	Aug 11, 2021	Milly Arnold
<input type="checkbox"/>	2018 Return Info(signed_08/30/2021).pdf	Aug 30, 2021	Milly Arnold
<input type="checkbox"/>	2021-05-18_11-44-52.png	Jul 22, 2021	Luna Lovewell
<input type="checkbox"/>	Poekhali 2 pages 70-71.pdf	Jul 20, 2021	Luna Lovewell
<input type="checkbox"/>	Screenshot_20210819-204113.jpg	Aug 24, 2021	Luna Lovewell
<input type="checkbox"/>	W4(signed_08/11/2021).pdf	Aug 11, 2021	Milly Arnold
<input type="checkbox"/>	W4(signed_08_11_2021).pdf	Aug 24, 2021	Luna Lovewell

Drag files here to add

Download selected

4. Click on an individual file to open the file previewer.

- If needed, click on the **Print** or **Download** icons in the top right corner.

