

CANOPY – CLIENT PORTAL

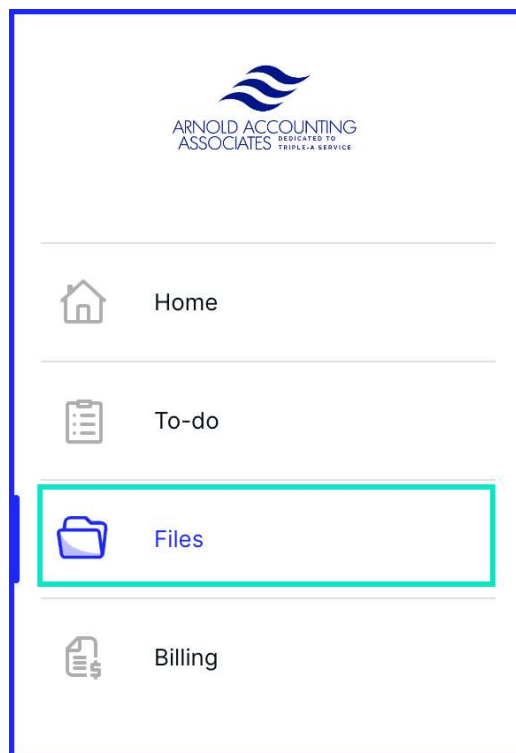
Uploading a file

Upload requirements

- **Max file size:** Files cannot exceed **4.999342 GB**.
- **Folders must be zipped or compressed.** Unzipped folders cannot be uploaded to Canopy.
 - To Zip or Compress a folder, right-click on the folder and select the option to Zip or Compress from the popout menu. Upload the new zipped or compressed folder to Canopy.

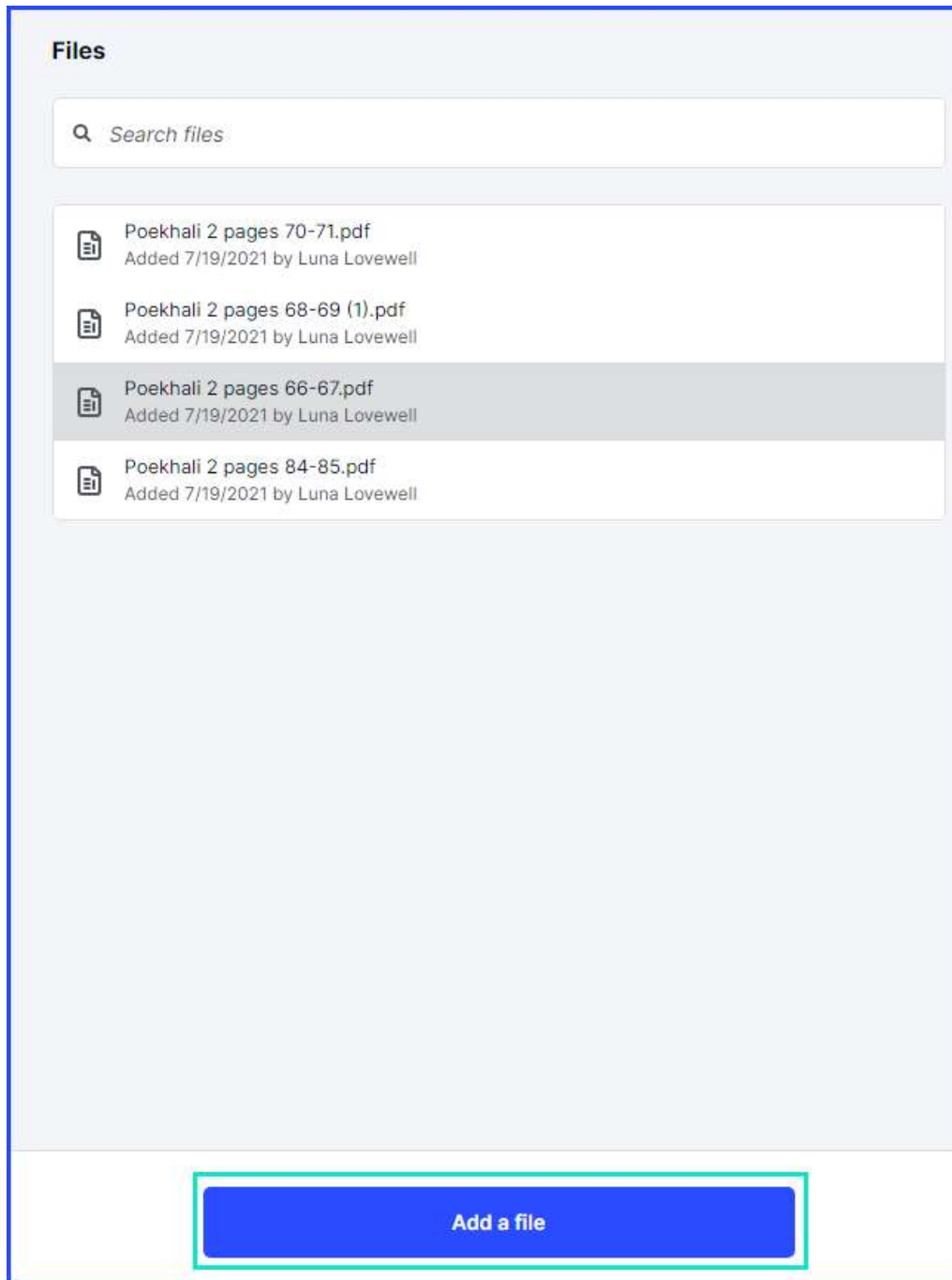
The Client Portal allows you to upload files from your computer to Canopy so that they can be easily accessed by you and your practitioner. Once uploaded, your accountant will receive a notification to let them know a new file has been added. Files can be uploaded with just a few clicks, or by dragging and dropping the files you want to upload. To get started, log in to the [Client Portal](#).

1. Click the *Files* tab.



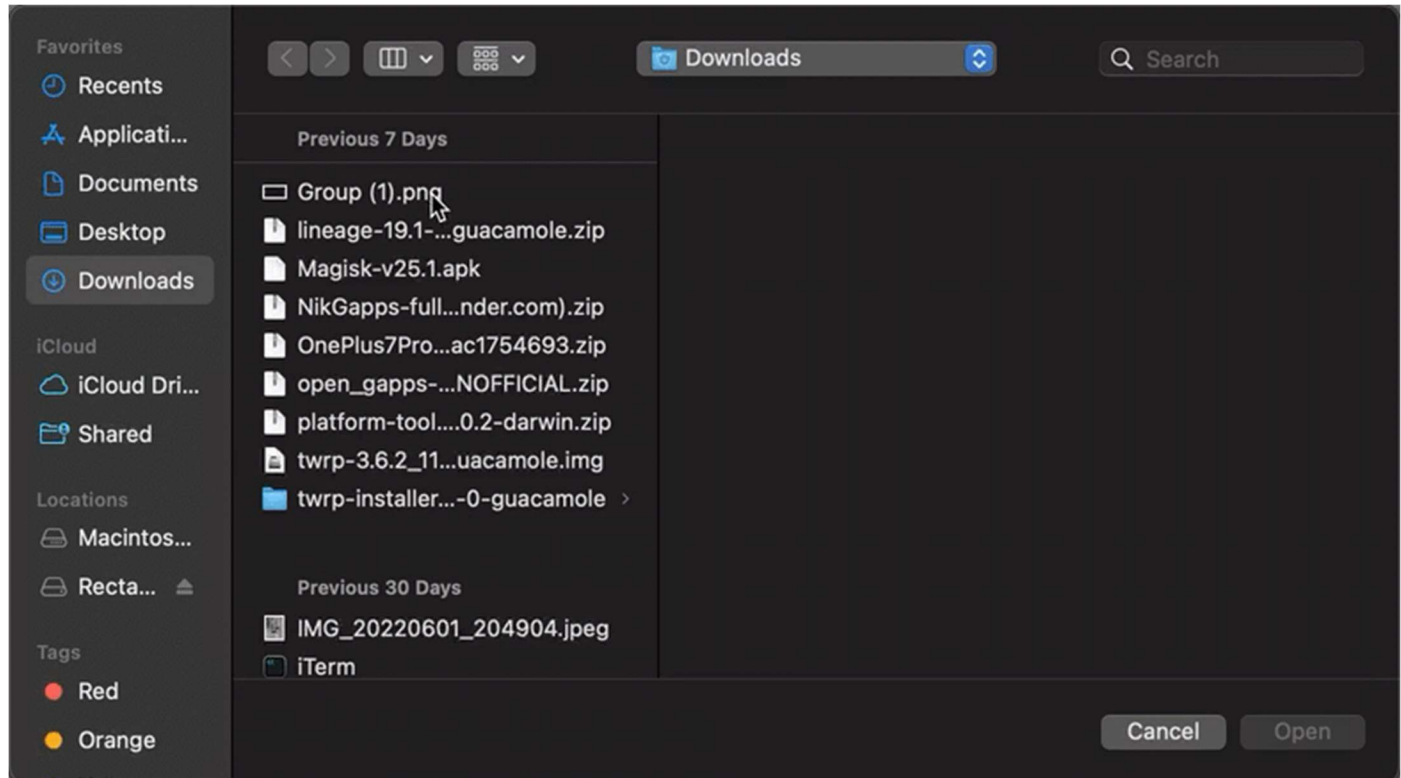
2. Click *Add a File*.

- A new file explorer or finder screen will pop up for you to search through your computer's files.

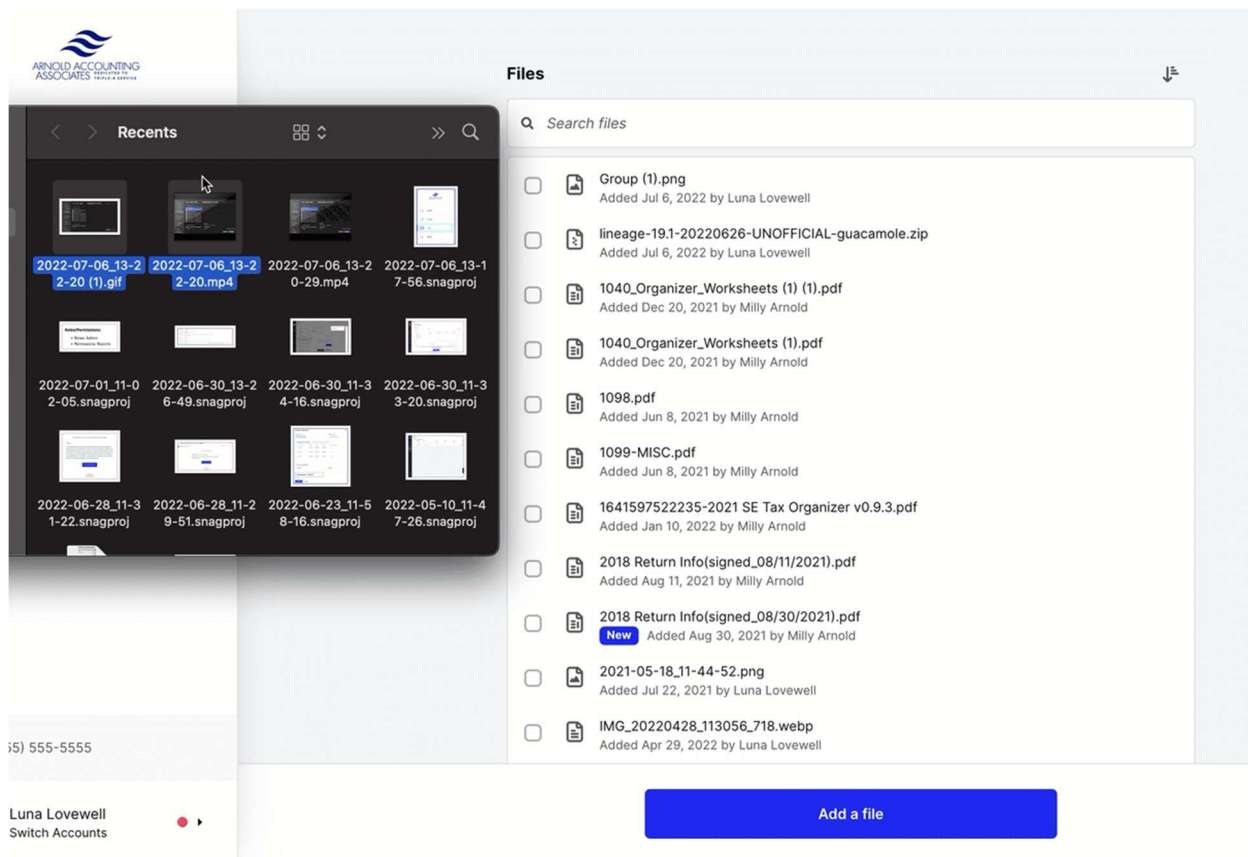


3. Select the file on your computer you wish to upload and click *Open* to upload it.

- Hold **Shift** and **Click** to select all of the files between your first and second click.
- Hold **Control** and **Click** to select multiple, non-sequential files.
- You can also select entire folders, as needed.



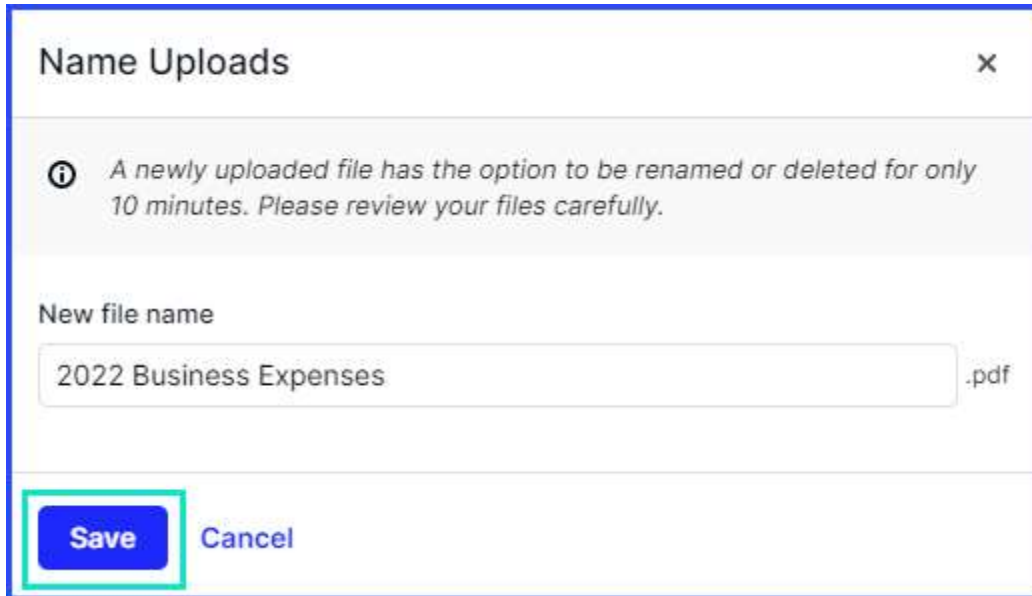
4. Alternatively, you can drag and drop files into the file location to upload them.



5. In the provided text-box, input a *file name*.

The screenshot shows a 'Name Uploads' dialog box. At the top, there is a title bar with the text 'Name Uploads' and a close button (X). Below the title bar, there is a message: 'A newly uploaded file has the option to be renamed or deleted for only 10 minutes. Please review your files carefully.' Below the message, there is a text input field labeled 'New file name' containing the text '2022 Business Expenses.pdf'. At the bottom of the dialog box, there are two buttons: 'Save' and 'Cancel'.

6. Click *Save*.



Name Uploads

ⓘ A newly uploaded file has the option to be renamed or deleted for only 10 minutes. Please review your files carefully.

New file name

2022 Business Expenses .pdf

Save Cancel

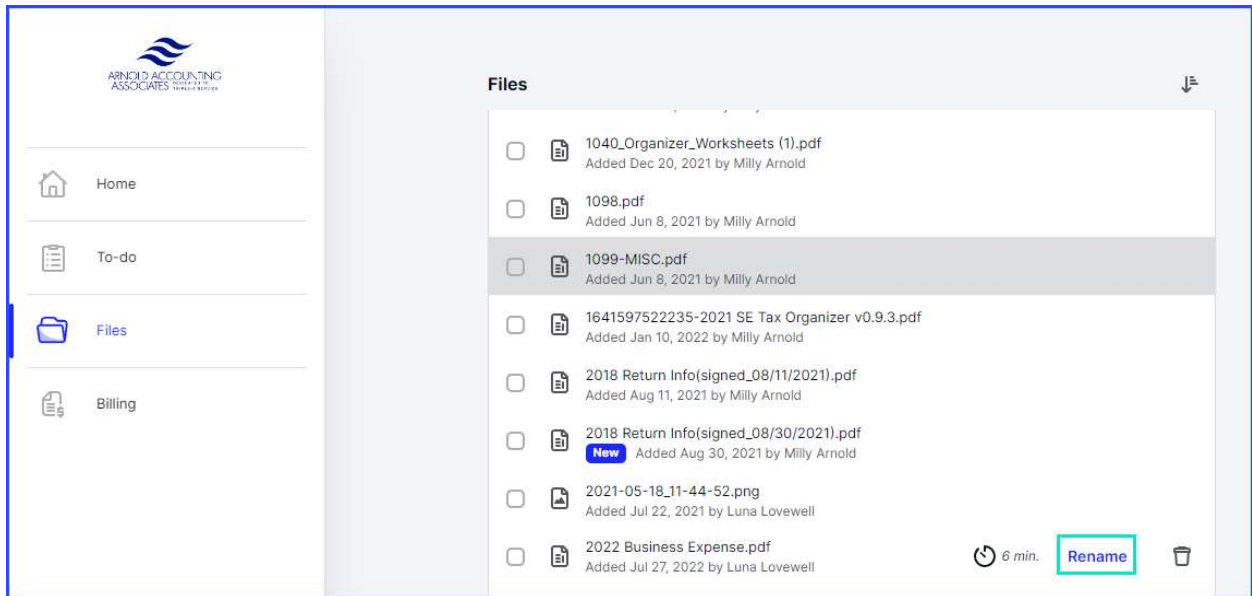
Rename or Delete an Uploaded File

After you've uploaded a file, a 10 minute timer is displayed next to the newly uploaded file. Clients have 10 minutes to rename or delete a file. After 10 minutes have passed, you will need to contact your accountant to make any changes. This feature is meant to eliminate confusion for your accountant and help them to more quickly and accurately address your files.

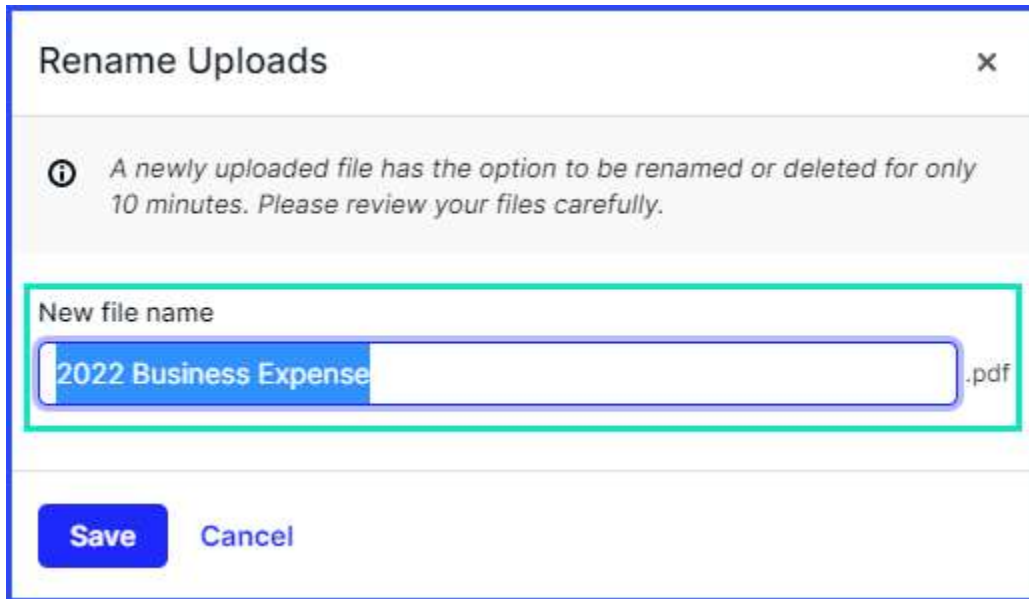
1. Locate the recently uploaded file in your files list.

2. Click the inline *Rename* button to edit the file name.

- If you do not see this option, you may need to reload the web page. Otherwise, the 10 minute window may have passed.



3. Input a new name in the provided text box.



4. Click *Save*.

- Please note, the timer will not reset. It is based on the time of the original upload.

Rename Uploads ✕


i A newly uploaded file has the option to be renamed or deleted for only 10 minutes. Please review your files carefully.

New file name

 .pdf

Save Cancel

5. Click on the in-line *Trash* icon to delete the file.











Home

To-do

Files

Billing

Files ↓

<input type="checkbox"/>	 1040_Organizer_Worksheets (1).pdf Added Dec 20, 2021 by Milly Arnold
<input type="checkbox"/>	 1098.pdf Added Jun 8, 2021 by Milly Arnold
<input type="checkbox"/>	 1099-MISC.pdf Added Jun 8, 2021 by Milly Arnold
<input type="checkbox"/>	 1641597522235-2021 SE Tax Organizer v0.9.3.pdf Added Jan 10, 2022 by Milly Arnold
<input type="checkbox"/>	 2018 Return Info(signed_08/11/2021).pdf Added Aug 11, 2021 by Milly Arnold
<input type="checkbox"/>	 2018 Return Info(signed_08/30/2021).pdf New Added Aug 30, 2021 by Milly Arnold
<input type="checkbox"/>	 2021-05-18_11-44-52.png Added Jul 22, 2021 by Luna Lovewell
<input type="checkbox"/>	 2021 Business Expense Report.pdf Added Jul 27, 2022 by Luna Lovewell

🕒 4 min. Rename 