INTRODUCING:

Client Portal

Staying in touch with your accountant has never been easier. Client Portal enables you to view invoices, share files, and ask questions directly from your phone.

1 Share Files

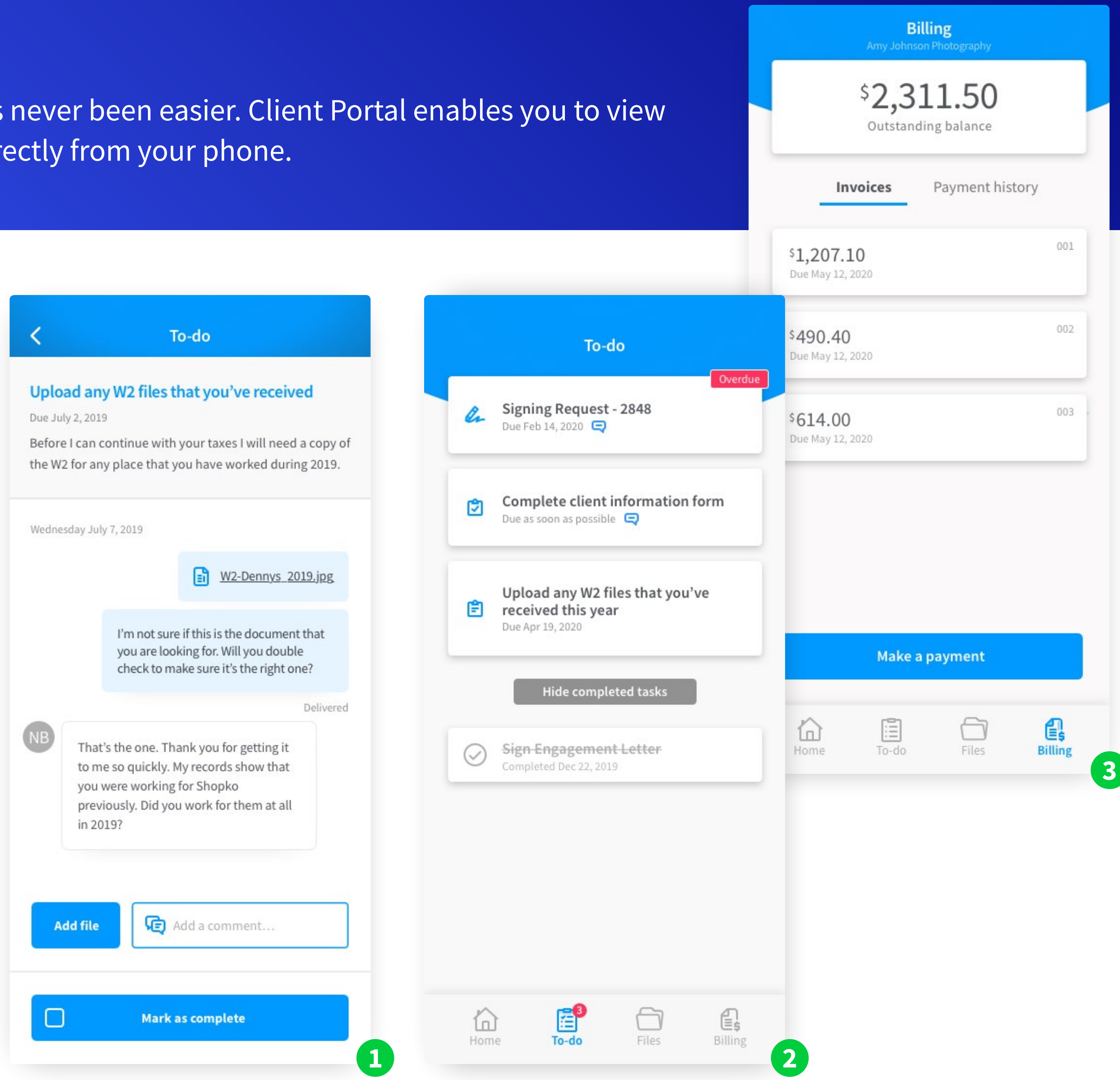
Instead of going in for an hour-long appointment with your accountant, send all of your important tax forms securely through a convenient mobile app.

2 Track Tasks

Your accountant will most likely assign you specific tasks to be completed in the Client Portal. With each request, you can send questions to your accountant or mark the task as complete.

3 View Invoices

View your outstanding balance and invoices from the convenience of the app.



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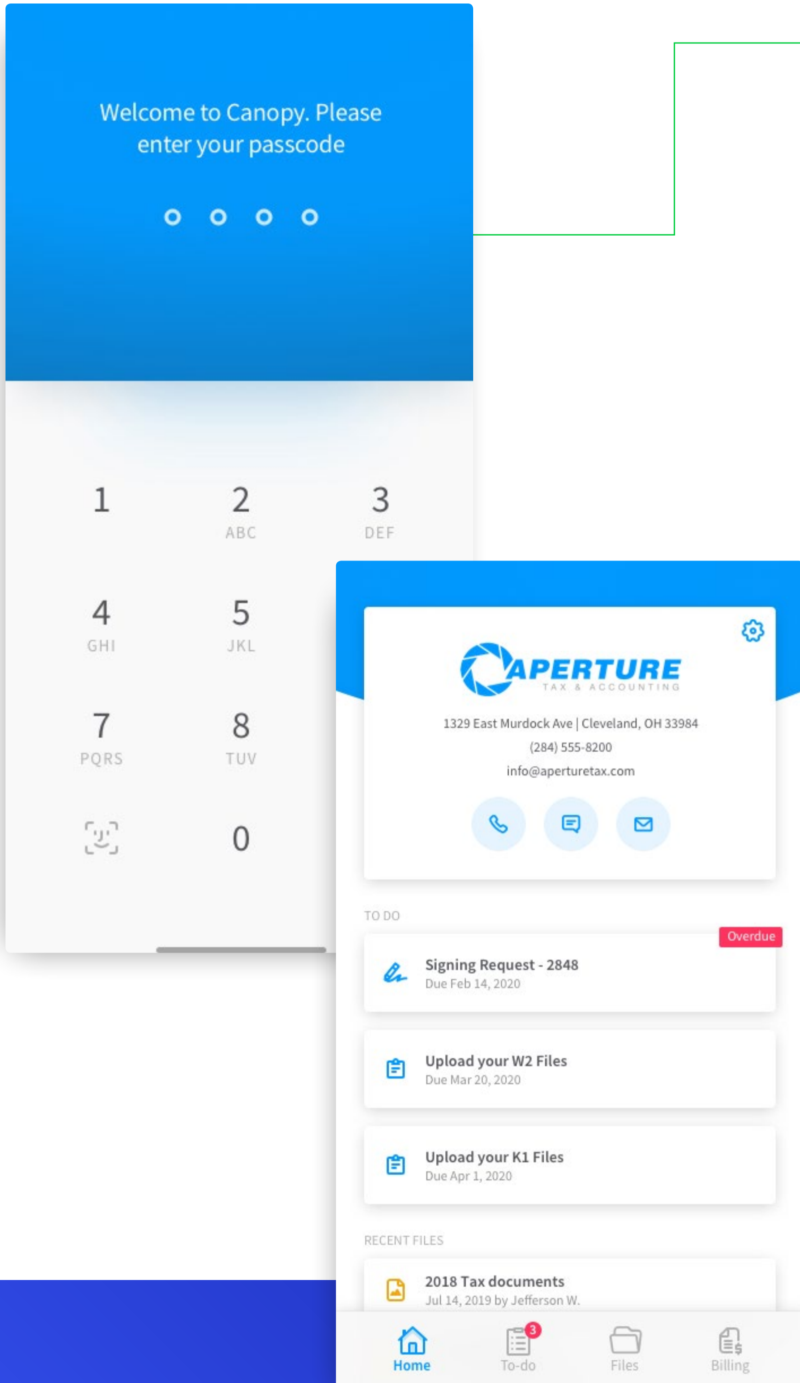

Logging In

Download the Canopy Client Portal mobile app from the app store on your device. If your accountant has sent you a client portal invite before, use your existing login credentials. To create a new account, request a client portal invite - to be sent via email - from your accountant.

+ Enter your email and password.
+ Tap Get Started.
+ If needed, tap Allow Notifications.
+ Enter a 4 digit passcode for added security.

Getting to Know Your Client Portal

Once you have successfully logged in and selected any notifications or security options, you can navigate through the client portal app.

+ The Home screen will display your to-do list, recent files, and your accountant's contact information.
+ Tap To-do to view all tasks listed on your to-do list.
+ Tap Files to view or upload files.
+ Tap Billing to view invoices sent to you.