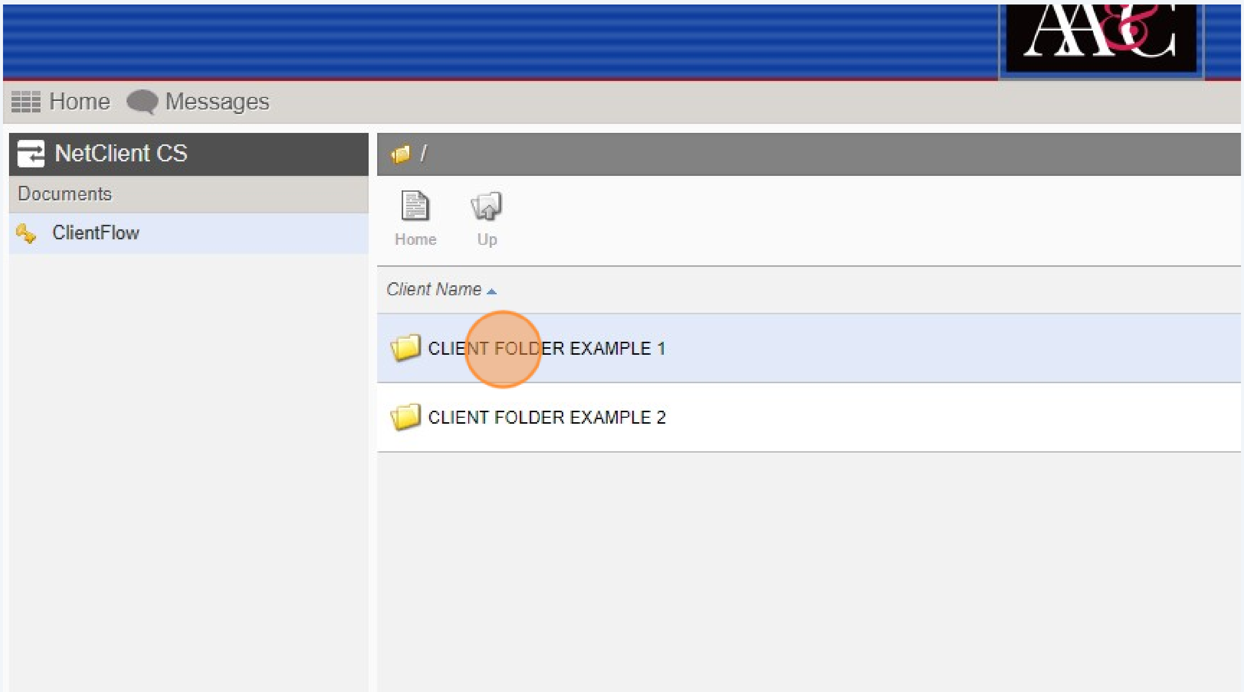
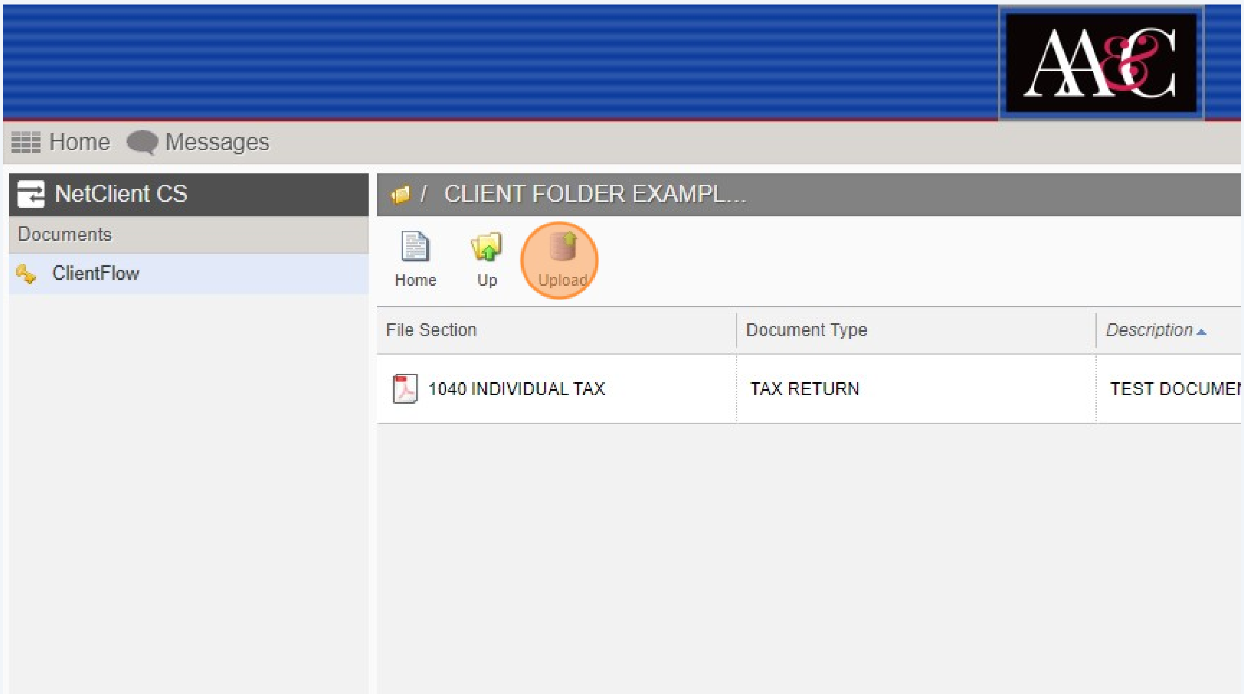
Uploading Files to Portal Account

1. Log into your Portal Account>Click "Client Flow".

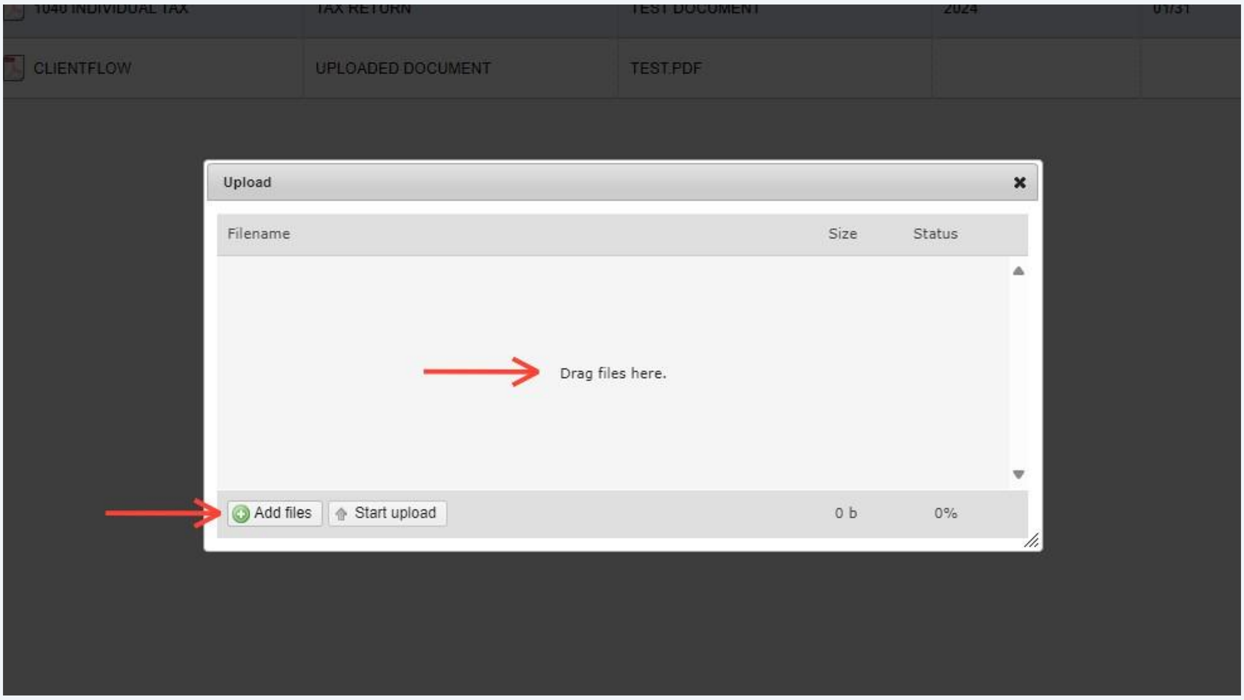
2. Open the folder you would like to upload your documents to.



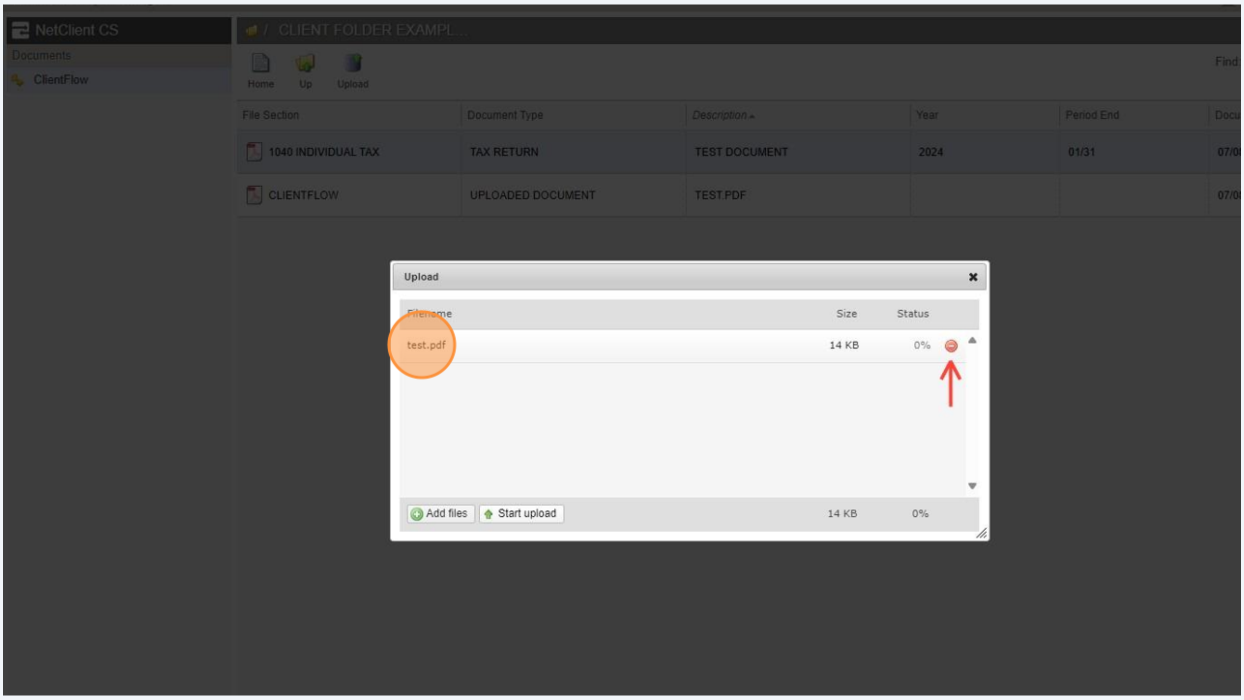
3 To upload a file, Click "Upload".



4 An "upload" box will appear: You can either add your files by choosing "Add Files" and navigating through the files on your device OR you can click and drag the desired documents into this box.



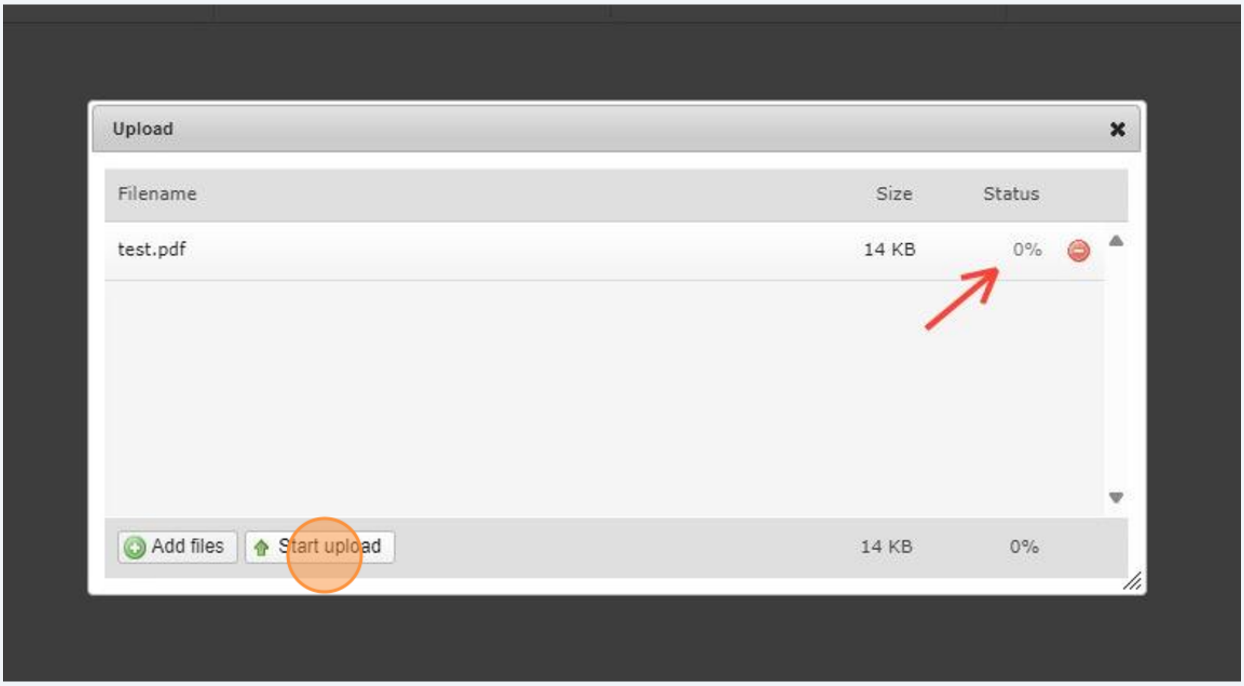
5 All documents that are added to this box will be listed showing what will be uploaded.



Tip! At this point, you still have the ability to add and/or remove documents that have been added to the upload box.

Tip! To remove a document, click the "-" sign.

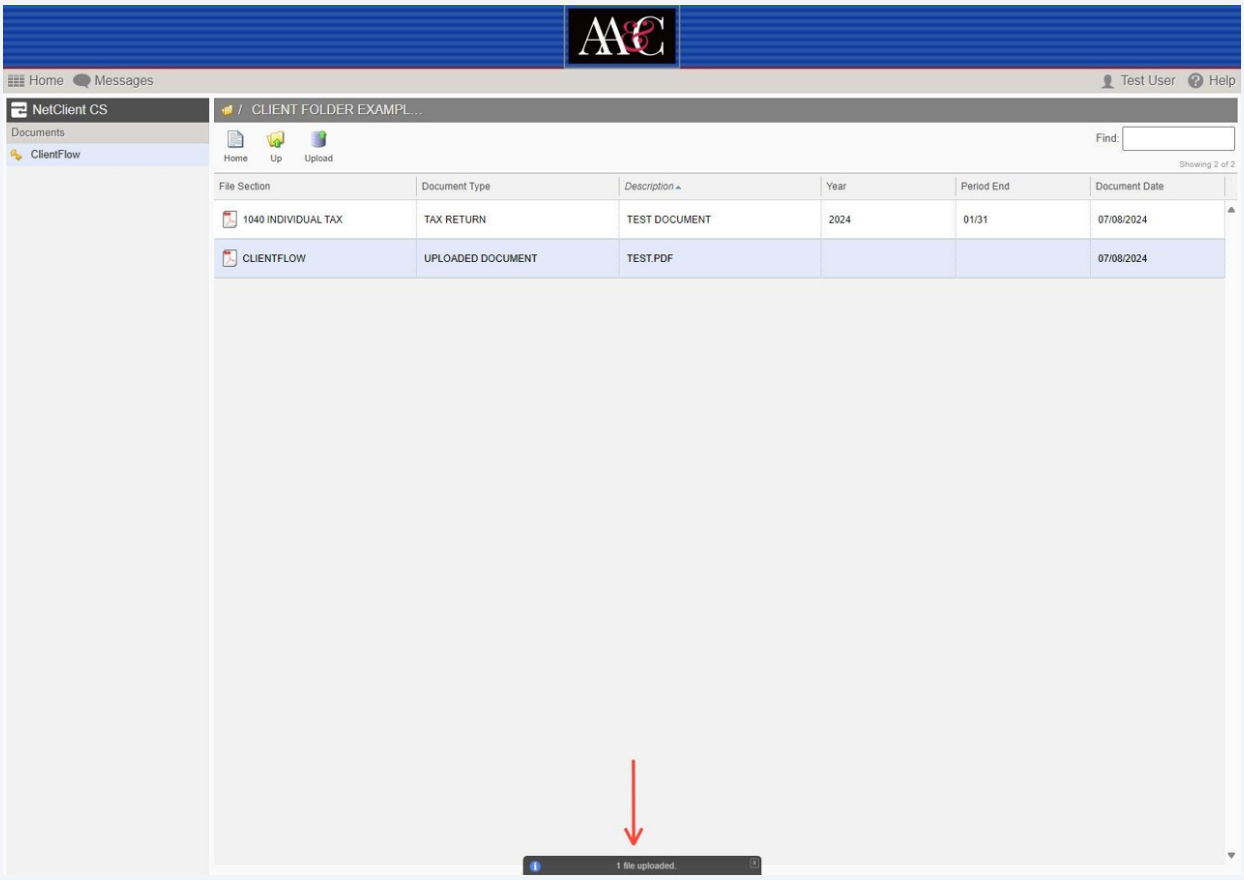
6 Once you have added all documents you want uploaded to the folder in the upload box, you will click "Start Upload".



Tip! Pay attention to the "status"- Each document will load one at a time, once all documents reach 100% the upload box will close.

7

Once the upload box closes, you will get a message at the bottom stating how many documents/files were uploaded.



8

All documents that you uploaded will then be listed under the folder you selected in step 2.

Tip! Documents with the File Section of 'ClientFlow' are documents that you have uploaded. If you click the heading 'File Section' you can group the documents by 'ClientFlow', making it easier to identify the documents you uploaded.

Alert! Once you have uploaded your documents successfully, the firm will get a notification that you have uploaded. If you would like to confirm that we received them, feel free to call or email our office.