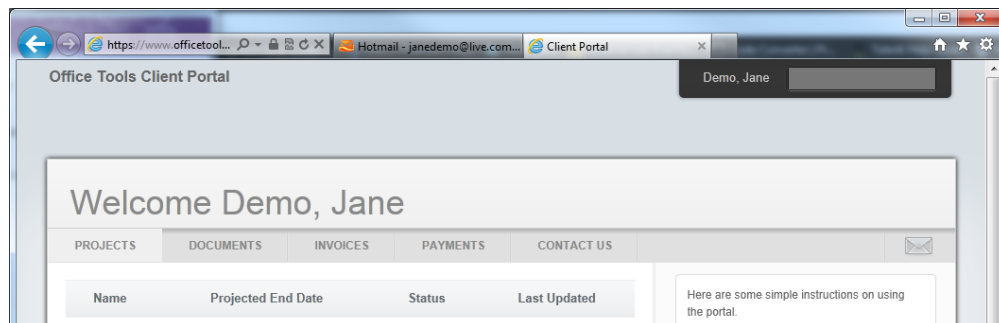
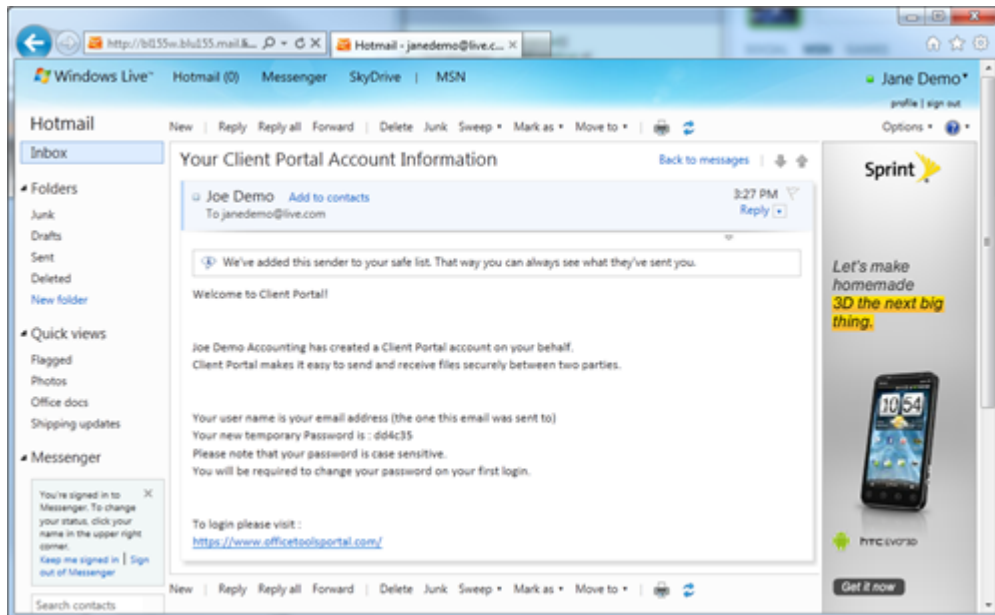
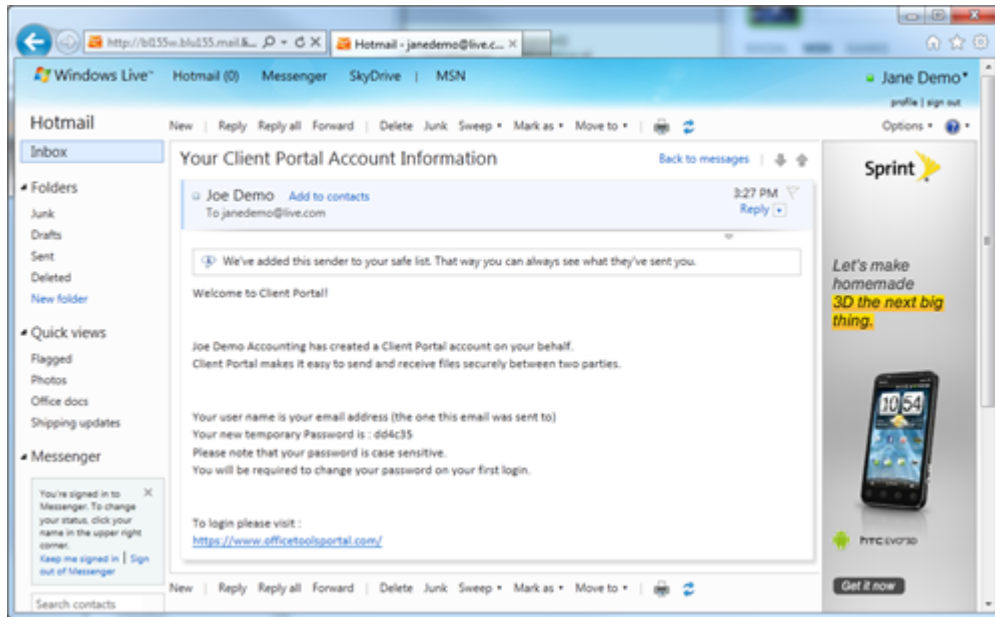


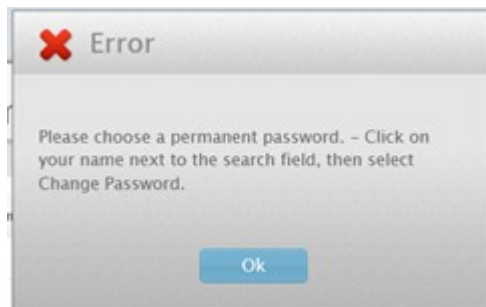
# Client Portal Instructions



This section will show you how to log in, view, download, and upload files as an End User.

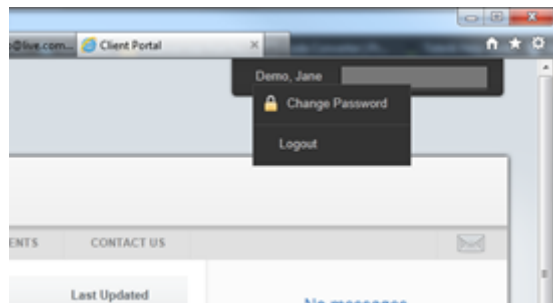


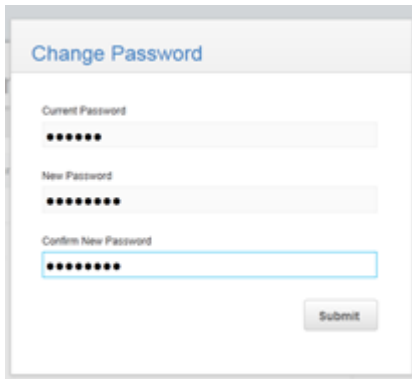
As an end user, you will need to log in via the website at <http://harryhonan CPA.com/15.htm>. Click on the link inside the email that you received when an admin created your account, then log in using your email address and the temporary password provided in the email.



Upon your first successful login, you will be prompted to change your password.

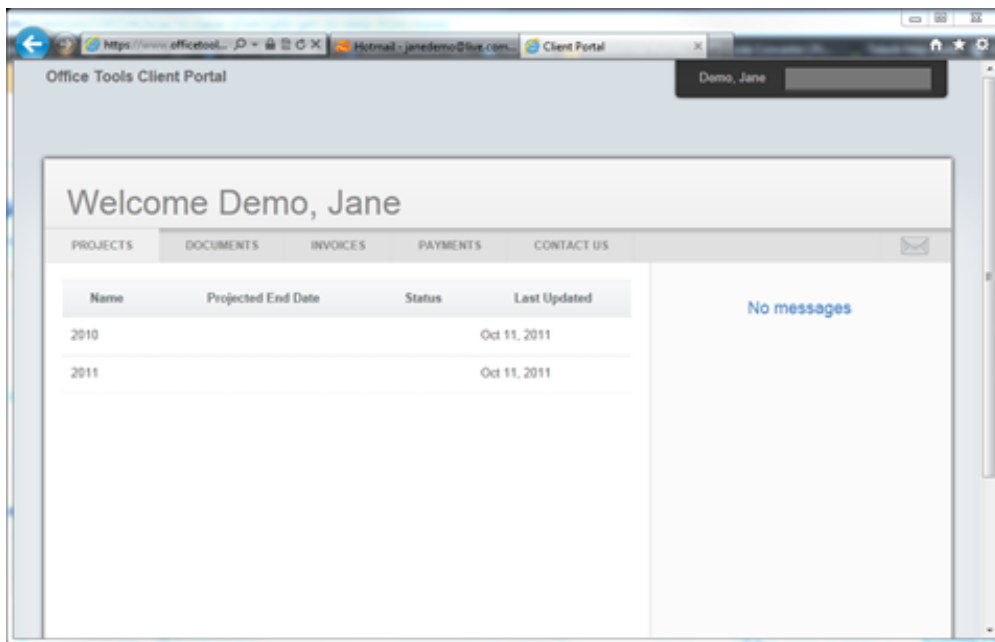
To change your password, simply hover your mouse over your name in the top-right corner of the screen, and click on the 'Change Password' item in the menu.





A screenshot of a 'Change Password' form. The form has a title 'Change Password' at the top. Below the title are three input fields: 'Current Password', 'New Password', and 'Confirm New Password'. Each field contains a series of black dots representing masked text. A 'Submit' button is located at the bottom right of the form.

You can then change your password by entering in your temporary password, then your desired new password twice and clicking 'Submit'.

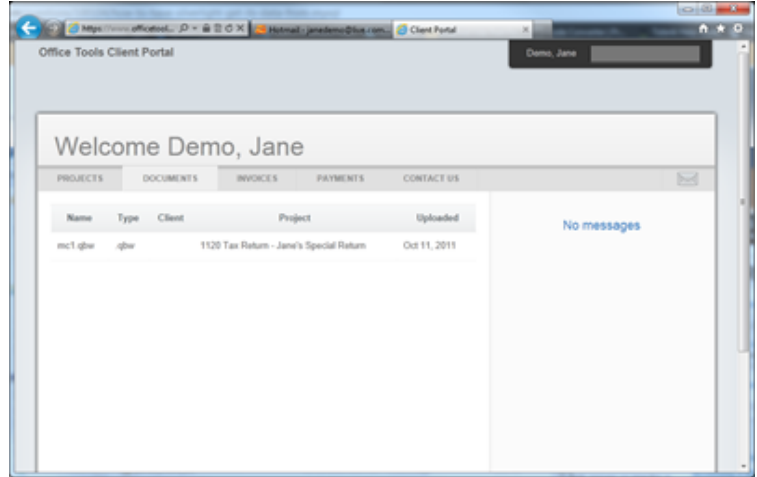


After you change your password, it will bring you back to the home page for your account.

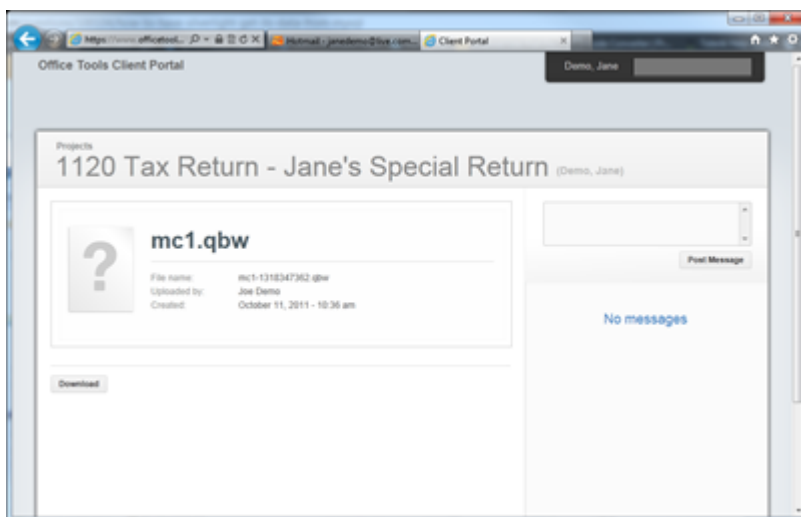
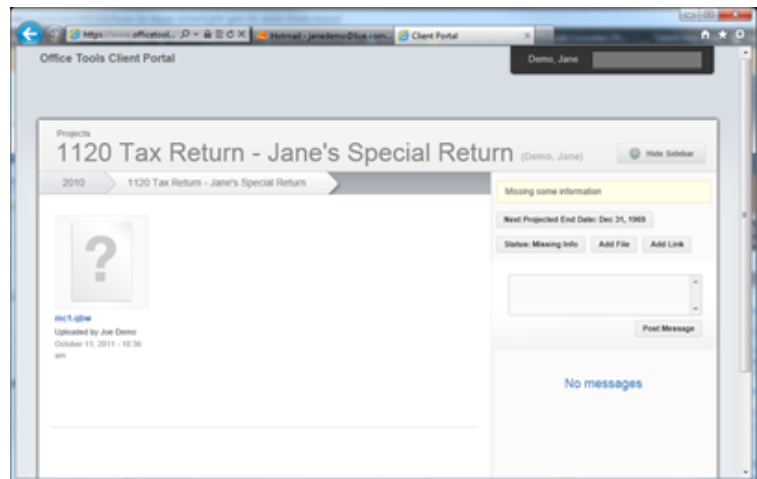
From this home page, you can view your projects, documents, invoices, and payments, or send a message to the admin staff by using the 'Contact Us' button in the toolbar.

## There are two ways you can view your files:

To view ALL of your files, click on 'Documents' to view them in a list-type format.



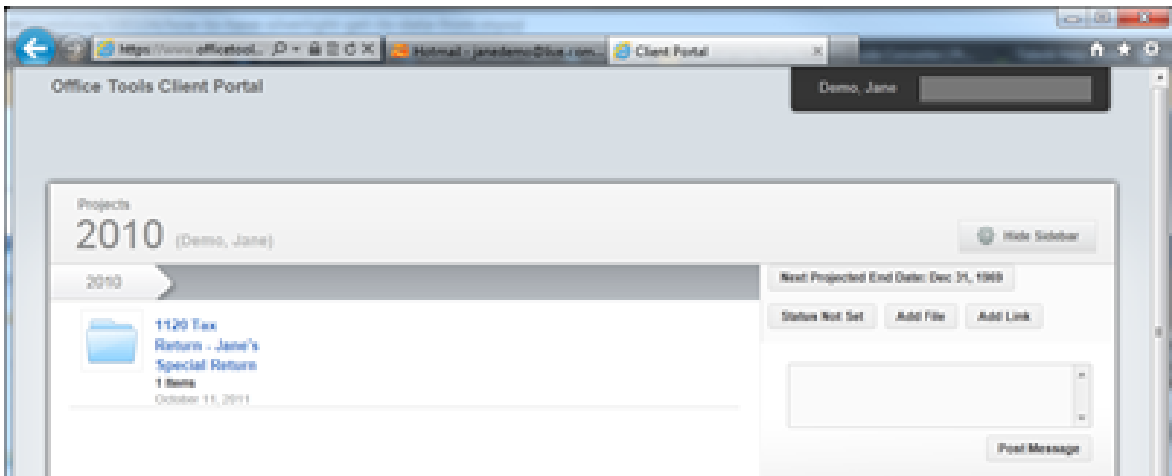
To view only the files associated to a specific project, click on 'Projects' in the toolbar, click on the project year, then click on the project itself. This will bring up a view that contains all of the files associated to that project in a tile-type layout.



Once you see the file you want to view/download, click on the file's name to go to the file's details.

From the details screen, you can click on the 'Download' button to download the file to your local computer.

To Upload a file, click on "Upload Document".

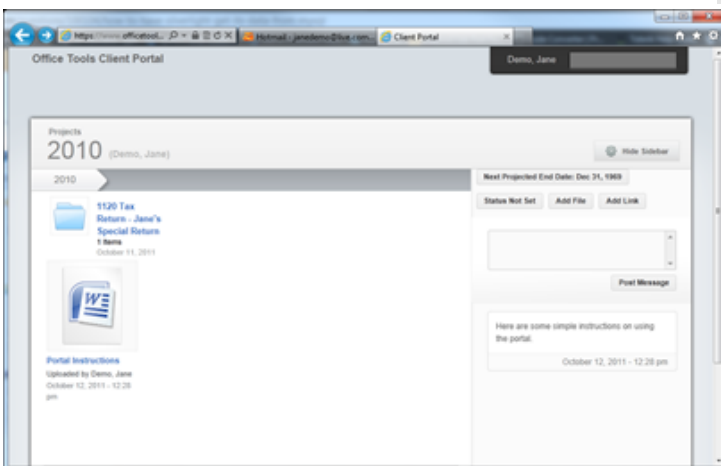
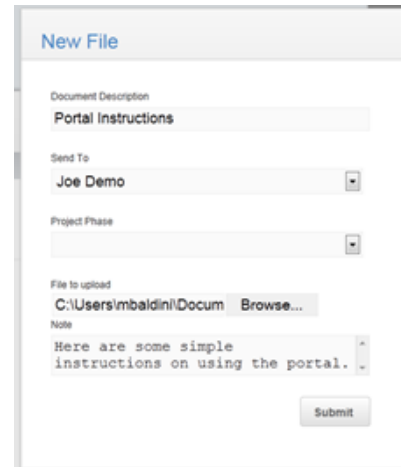


Once you get here, you can upload the file.

Now you can click on the 'Add File' button on the right-hand side

You should now see the 'New File' dialog.

Enter in a description, the staff member to send the file to, a project Assignment (not required), and a note. Then click on 'Browse...' and select the file you want to upload, and click 'Submit'.



Once the file is uploaded, you should see the 'File Uploaded Successfully' message, followed by the updated list of files...