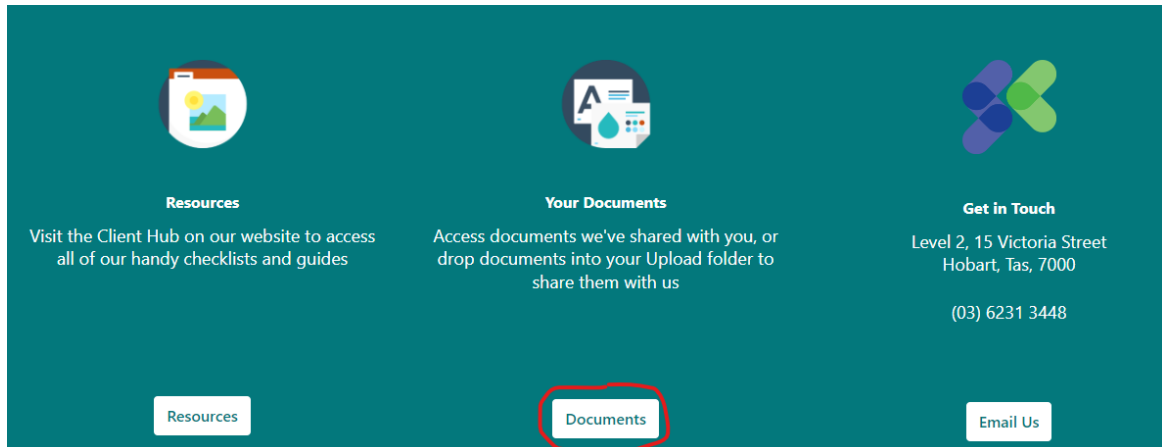# Navigating the Client Portal

Once you've logged into the client portal, there are a number of things you can do here, including book an appointment or send us an email. You will also find links to the handy resources page on our website as well as all of our social media pages so you can stay up to date with the latest from us. However, the main reason for you to use the client portal is to securely access and share documents.

Accessing Documents Shared with You

1. If we have notified you that there are documents uploaded to the portal for you to review, you can access these by clicking the Documents button on the Home page

2. From here, you will find a list of folders for all of the entities you have portal access to. If you only have access to one entity, you will only see one entity listed. Click on the relevant entity folder.
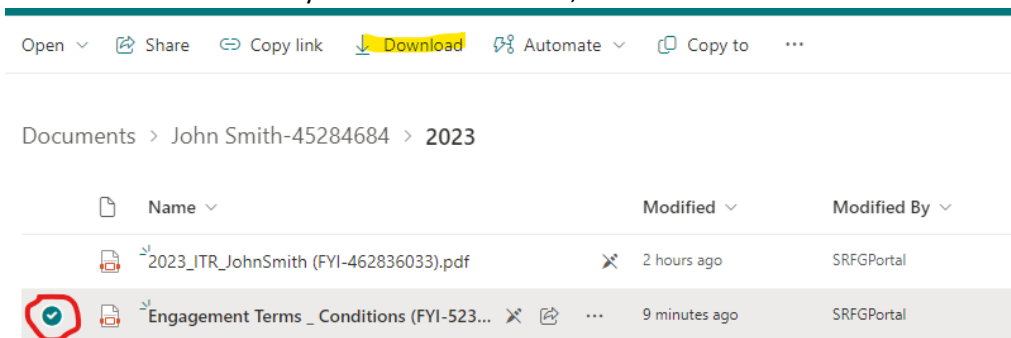

3. From here, if documents have been shared with you, you will see folders named after the financial year the documents fall under. To access the documents, click the relevant folder/s.

4. Once in the folder, under the Modified column, you will be able to see how long it has been since the documents were uploaded, this will indicate which documents are new. Documents will disappear after 30 days.
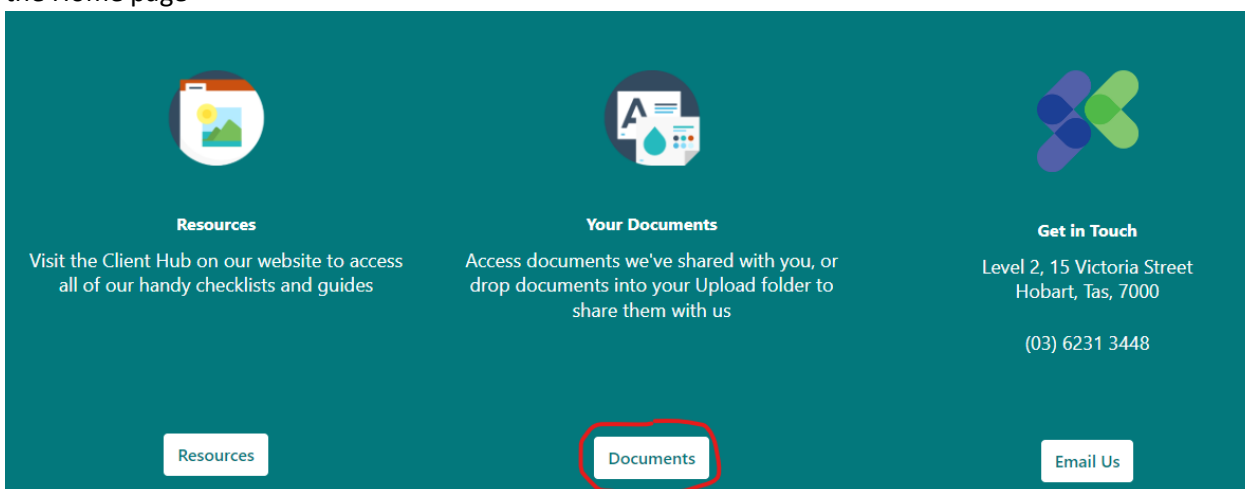
5. To download a copy, you can either open the document to view it and download from there, or tick the checkbox next to the file you want to download, and then click the Download button to download it
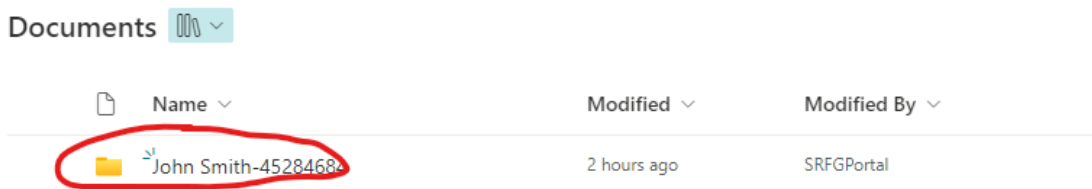

Share Documents with Us

1. To access the Upload folder for the entity you'd like to share documents for, click the Documents button on the Home page

2. From here, you will find a list of folders for all of the entities you have portal access to. If you only have access to one entity, you will only see one entity listed. Click on the relevant entity folder.

3. From here, if documents have been shared with you, you will see folders named after the financial year the documents fall under. To access the documents, click the relevant folder/s.
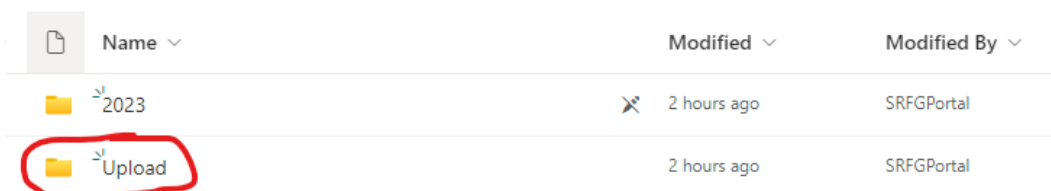
4. From here, you can drag and drop files into the folder, or click the Upload button to upload them. It is important to note, files will disappear from this folder immediately after uploading as they are pushed automatically into our document management system.