

The Client Portal App

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

End the continuous shuffling of papers back and forth between your tax professional's office and your home. Use the Client Portal to securely send all necessary files.

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

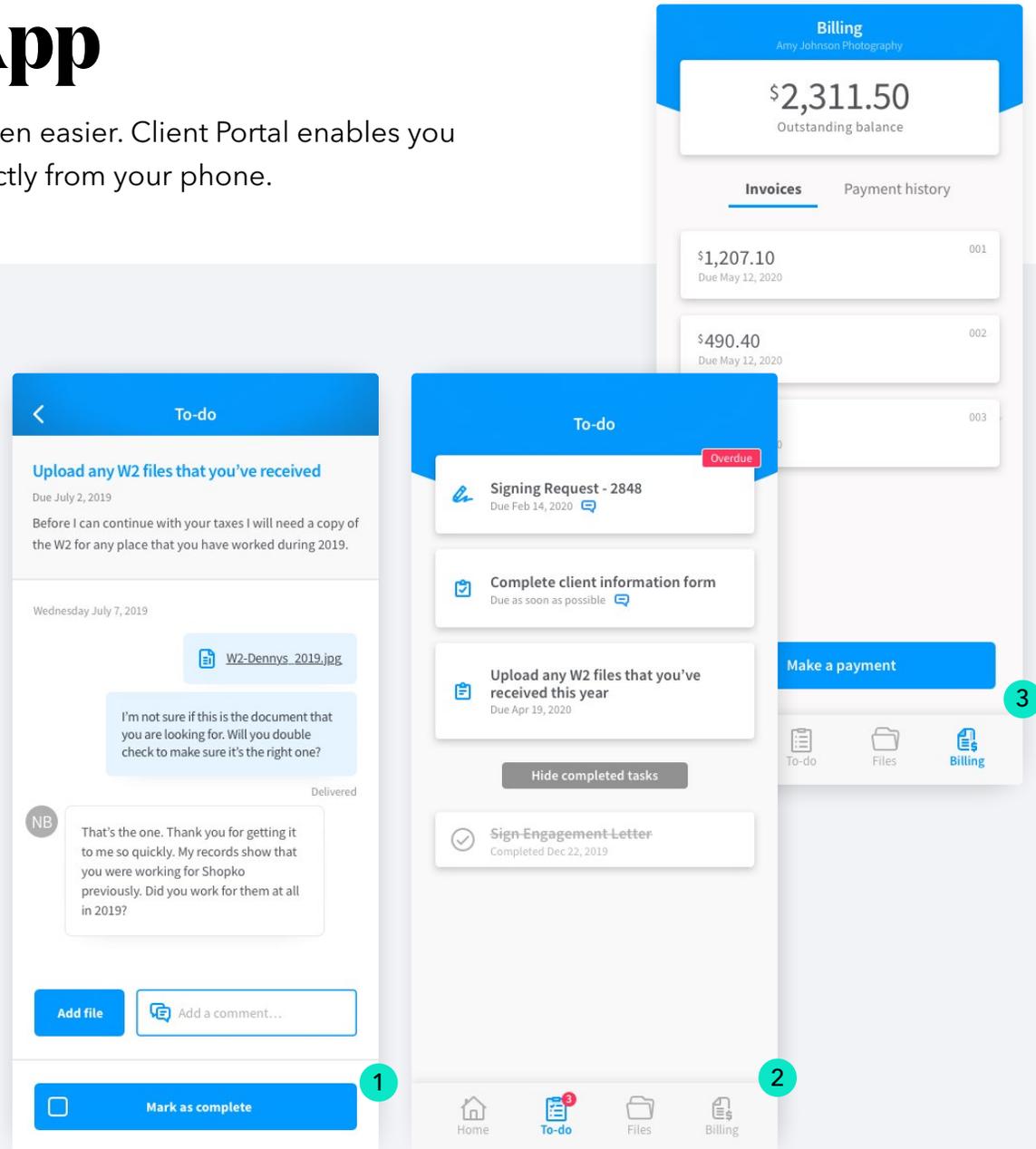
View your outstanding balance and invoices from the convenience of the app.

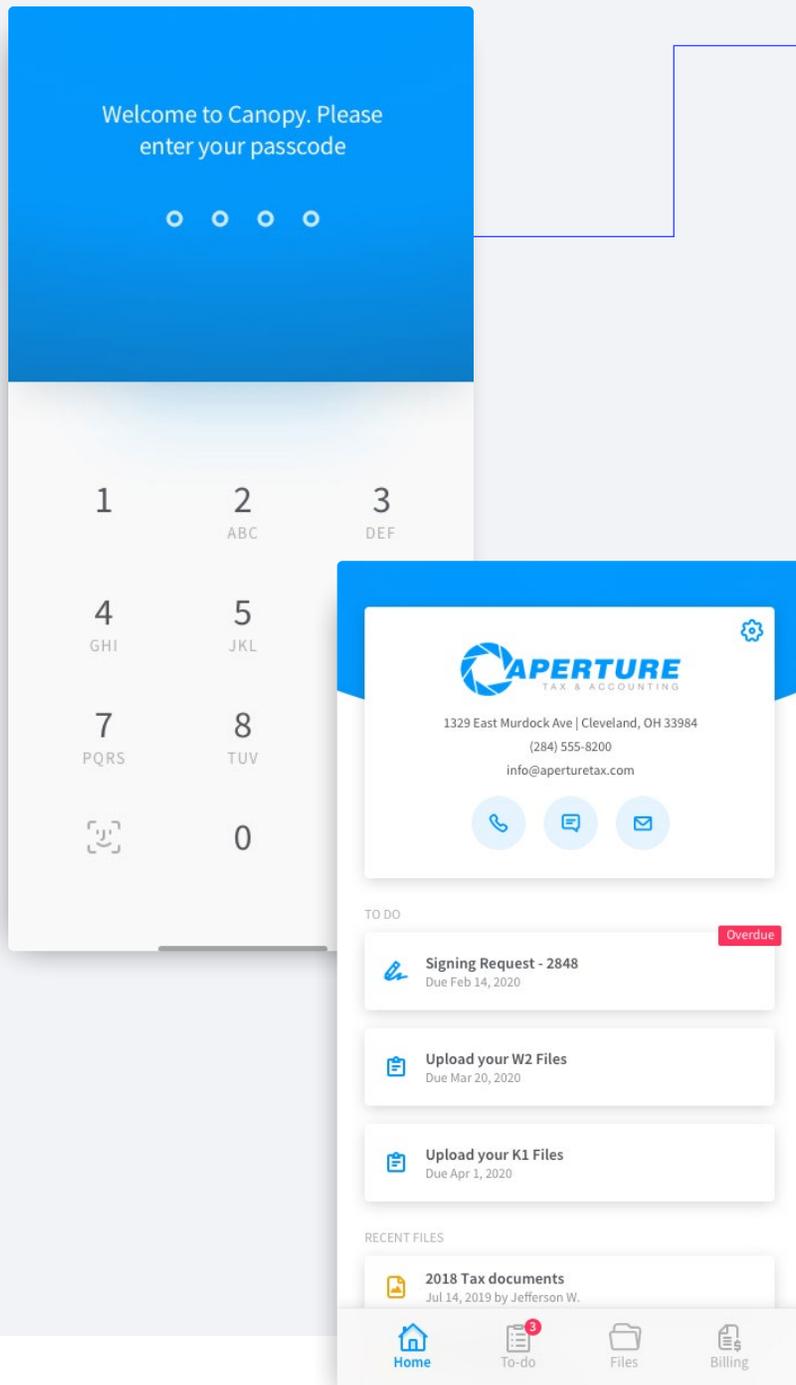
4. Sign Documents with Ease

E-sign documents and send them back to your accountant immediately in the secure client portal.

5. Ask Questions Anytime

The Client Portal enables you to send questions directly to your accountant. Follow up, ask for clarity, and more.





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.

In order to begin using the Client Portal, you will need to download the Client Portal app. Search for “Canopy Client Portal” in the Apple App Store or Google Play Store.

Your accountant will send you an invite via email to join the Client Portal. Upon receiving this email, you will need to create a Canopy account. To get started, click Create account in the email invitation from your accountant.

