



LEIF E. PETERSON, CPA

## Using our New Online Client Center Portal

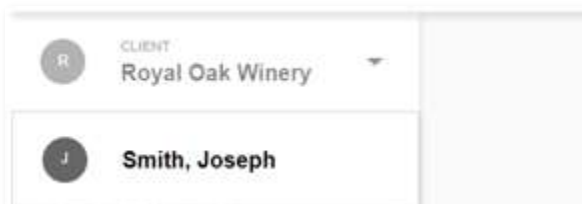
### Register your Account

You will receive an invite from Leif E. Peterson, CPA to register your account. Click Register Now, your login will be your email address and you can setup your own password.

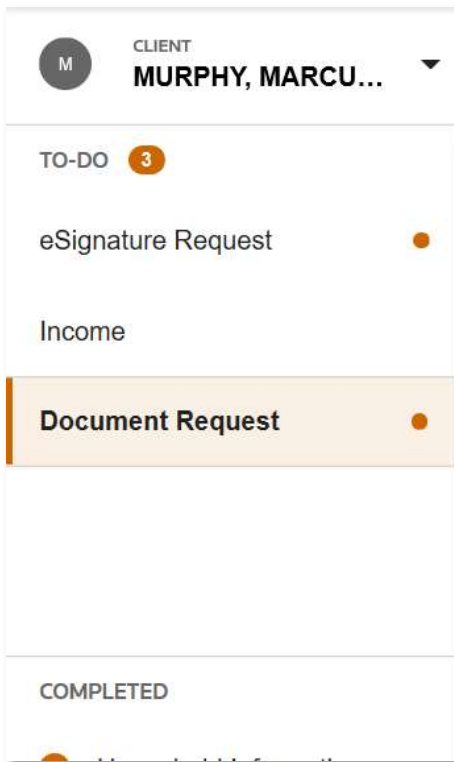


### Navigation and Use in the Online Client Center

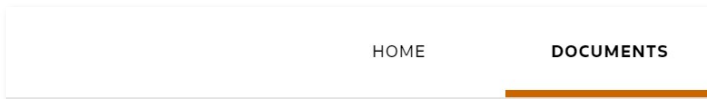
1. Use the toggle at the top left to navigate between companies or individual clients you are linked to.



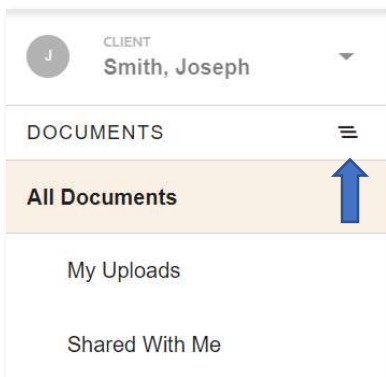
2. Use the Home Tab across the top for Tasks our firm sends you. Typical tasks will include things such as a request of a document, an organizer checklist for your tax return, or for electronic signatures.



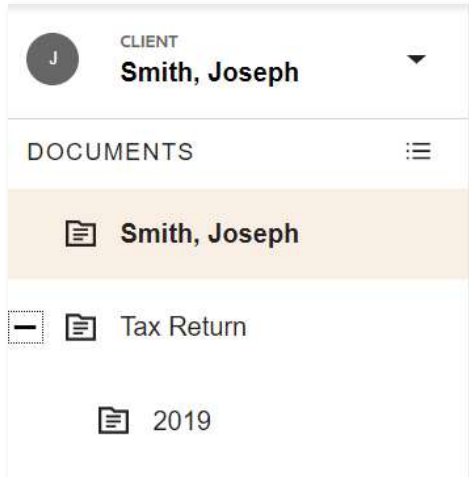
3. Use the Documents tab across the top to review documents our firm has shared with you, as well as a place to upload documents to our firm.



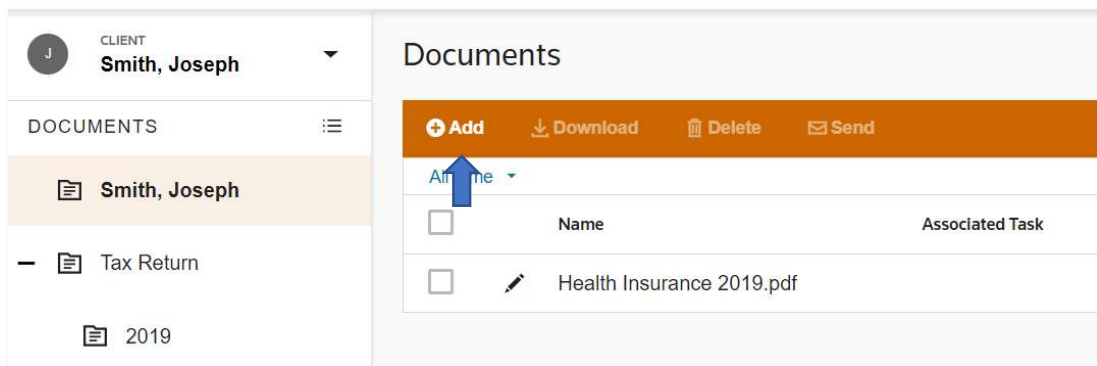
4. In the documents area, we recommend clicking the button below to create an organizational structure to the files shared with you.

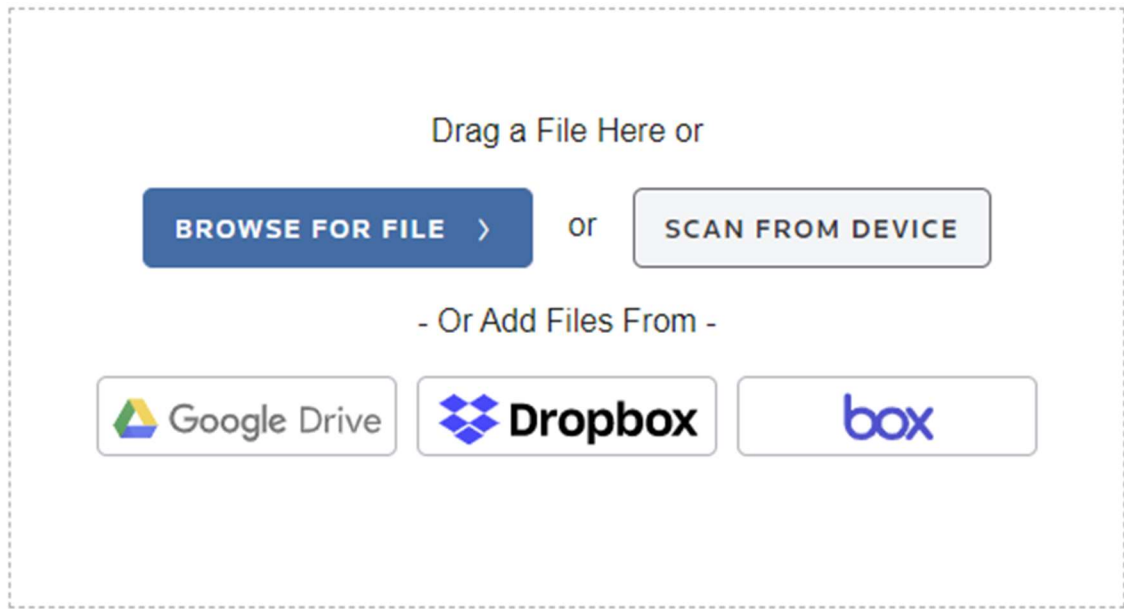


5. You now will see structure to your files shared from us by folder. One folder will be your Name or the Business Name. This folder is what you will use to upload files to us.



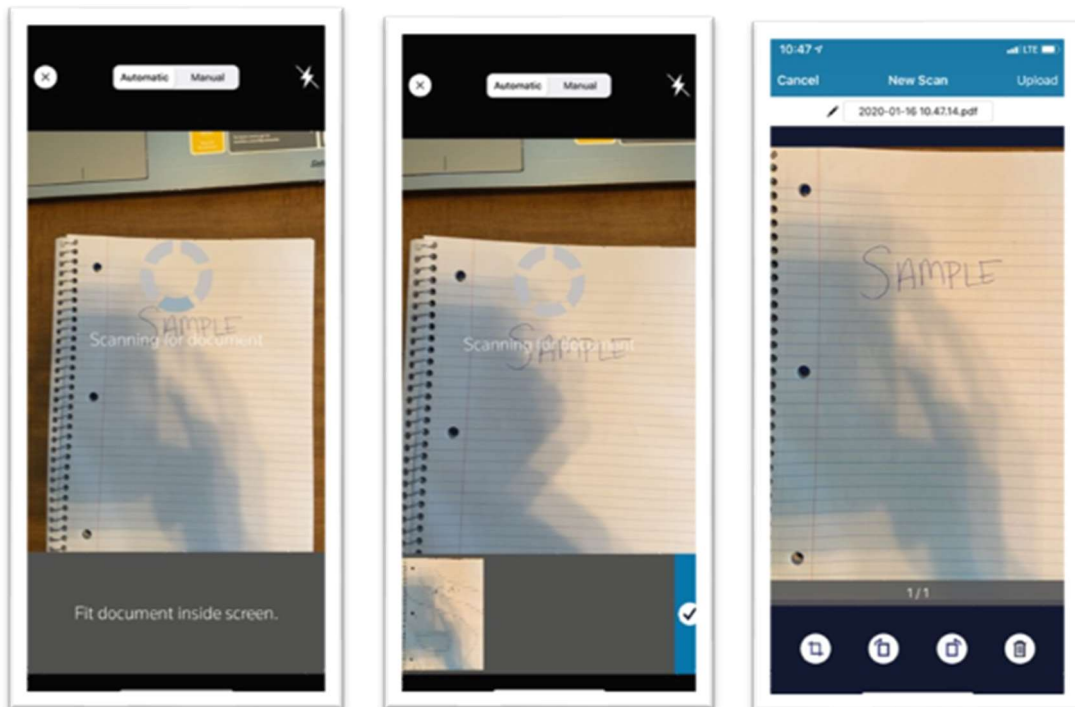
- To upload files to us that are not requested via the To-Do on the Home Tab, you will navigate to the business or individual name that the files relate to. Then click on the Business Name or Individual Client Name. Once you navigate there, click the Add button and then either drag/drop the file, browse for the file or connect to your Dropbox, Box, or Google Drive account to grab the file you want to upload. Click upload when the file or files have been added.





### Want to electronically upload your tax documents?

1. Click “Scan from device” and you will be able to scan your paper documents to us without stopping in the office.

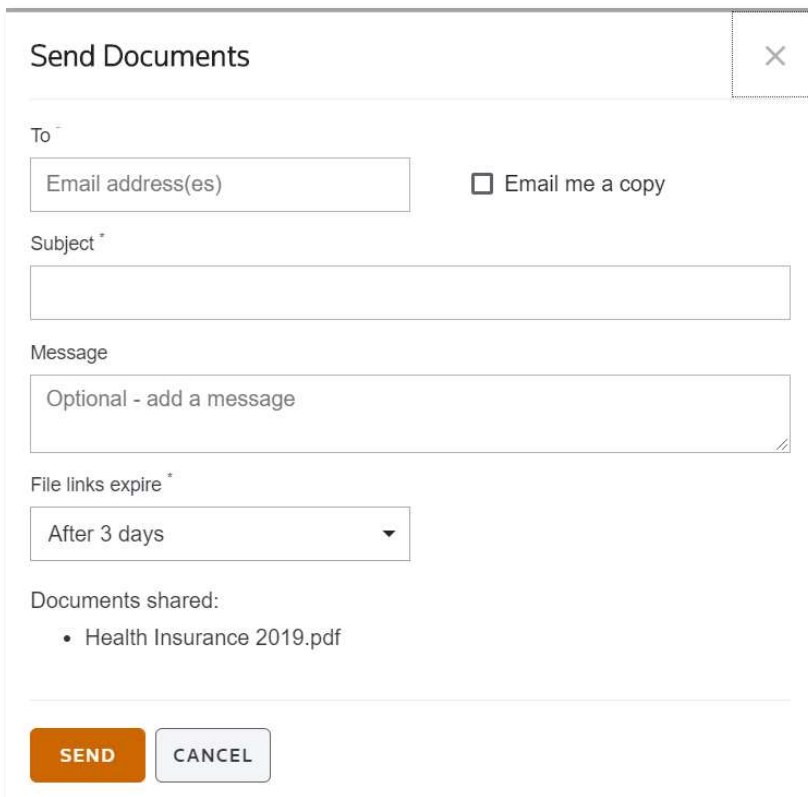
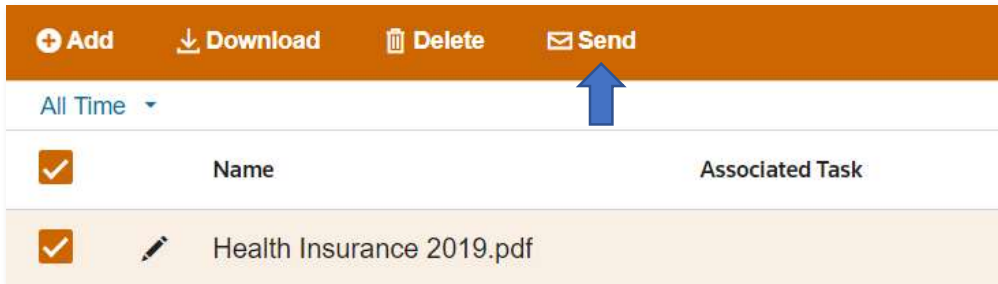


## Miscellaneous Additional Items using the Online Client Center

There are additional functions you may need to use in the Online Client Center. Below are items that may be useful.

### Send a copy of a document to a 3<sup>rd</sup> party? (Banker, Financial Advisor, etc.)

1. Click the file you want send in the list, click Send and put the recipients email address in. This will send a link to the recipient allowing them to download the file. We recommend setting an expiration time for the link you send.





The 'Send Documents' dialog box contains the following fields and options:

- To:** A text input field labeled 'Email address(es)' and a checkbox labeled 'Email me a copy'.
- Subject:** A text input field.
- Message:** A text area with the placeholder text 'Optional - add a message'.
- File links expire:** A dropdown menu currently set to 'After 3 days'.
- Documents shared:** A list containing 'Health Insurance 2019.pdf'.
- Buttons:** 'SEND' (orange) and 'CANCEL' (grey).

### Download a file

1. Click the file or files that you want to download, then click the download button above.

## Tax Source Documents

<input checked="" type="checkbox"/>	Name	Associated Task
<input checked="" type="checkbox"/>	 Onvio v3 (1).pptx	
<input checked="" type="checkbox"/>	 Client Financial Statements - Prepar...	

### Update your password

1. To update your password, click your name at the top right, click Edit Profile and you can update your name (if it changed) as well as update your password.

