

User Manual



Client Portal Instructional Video 3

How to upload your own documents to the portal



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STEP 1

Log in to the portal using your email address or your username, and your password.

Use the username/email and password that you set up when you activated the portal

Click here to reset your password, if you've forgotten it.

A screenshot of the Jach & Associates login page. The page has a dark blue header with the word 'Login' and a question mark icon. Below the header is the Jach & Associates logo. The login form contains three input fields: 'Accountant's Practice ID' with the value 'JACH0001', 'User Name/Email Address', and 'Password'. There is a 'Remember me' checkbox which is checked. At the bottom of the form, there is a 'Forgot Password' link and a blue 'Login' button. Red arrows point from the text instructions to the 'User Name/Email Address' field, the 'Forgot Password' link, and the 'Login' button.

Click here to login after you've entered your details



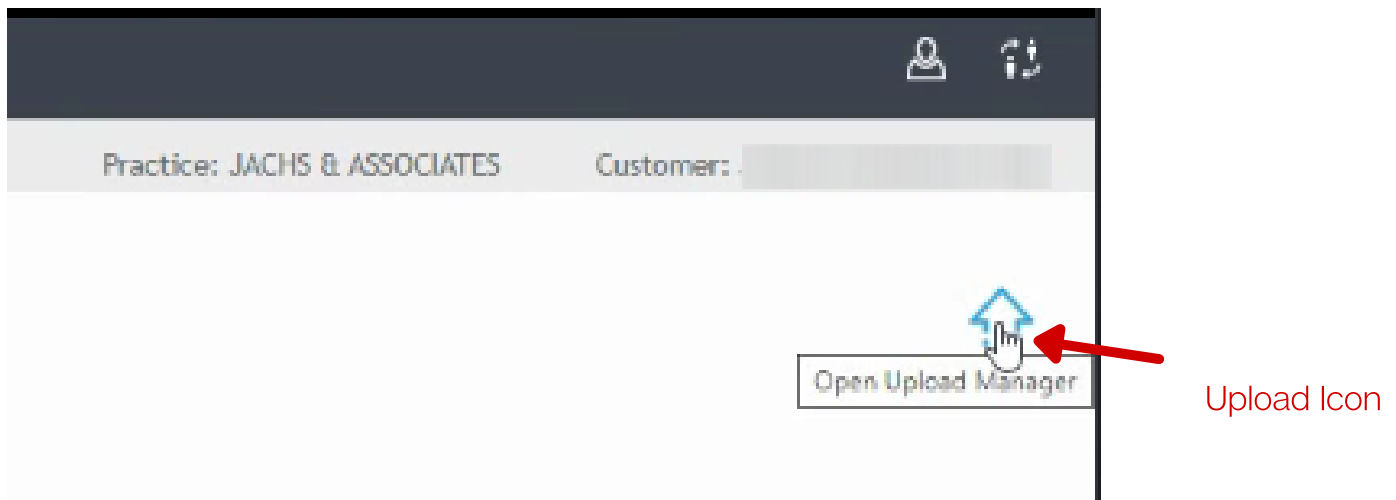
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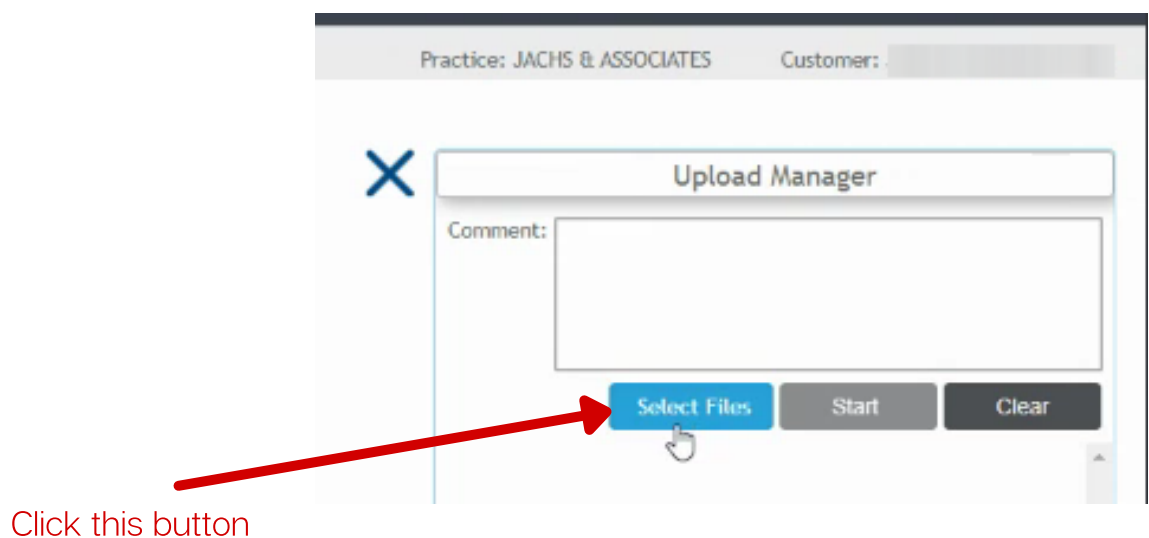
STEP 2

You will now be in the Document Listing page.
To begin the upload, click the upload icon.



STEP 3

Click "Select Files" to open File Explorer.





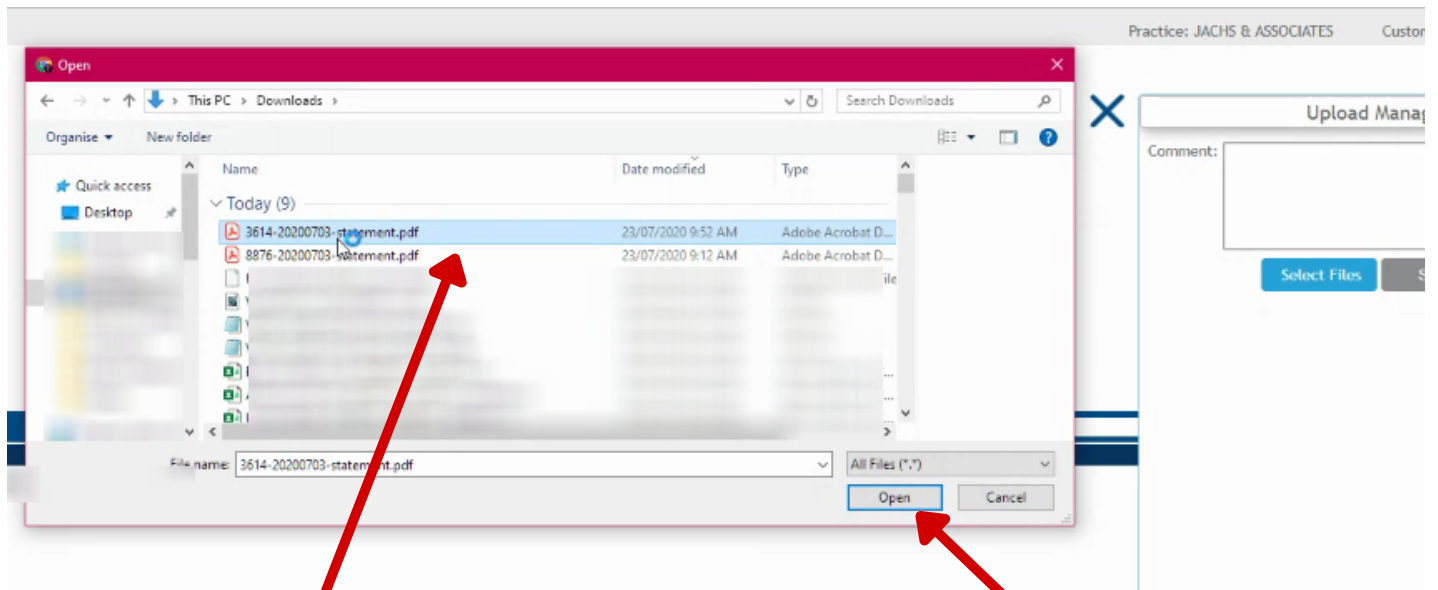
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STEP 4

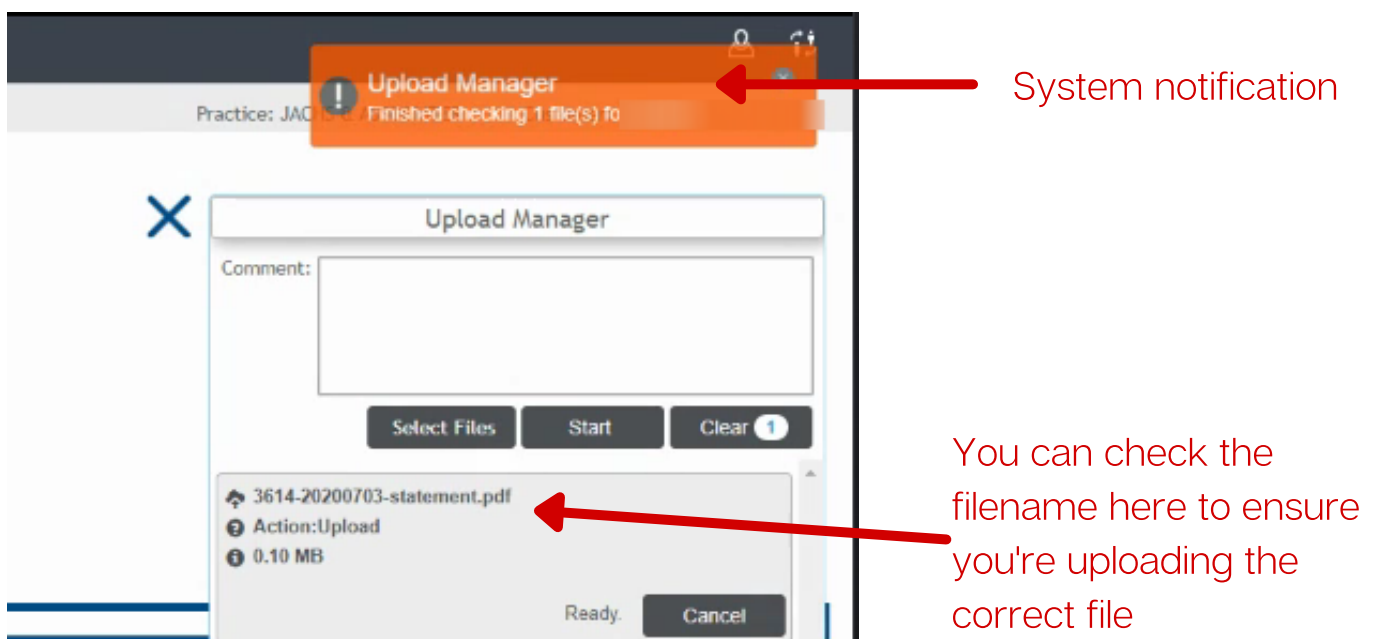
Click the file to select it and then click "Open".



Find your file and click it to select it.

Click Open

The system will check the file.



System notification

You can check the filename here to ensure you're uploading the correct file



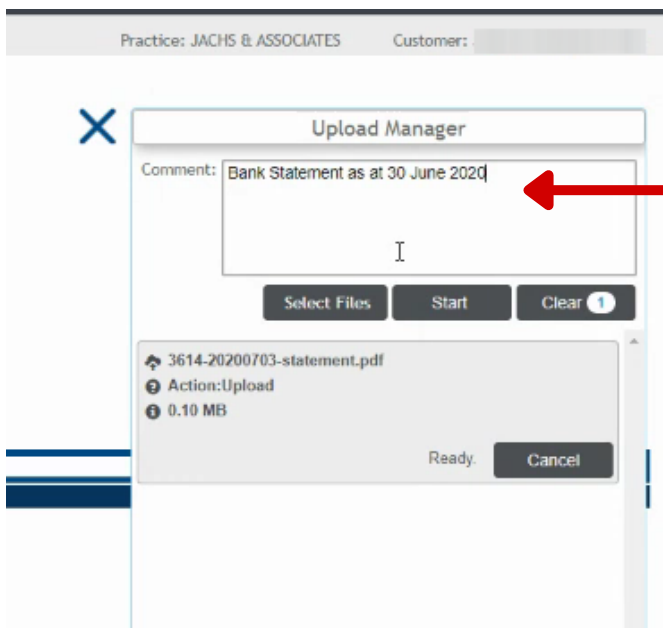
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STEP 5

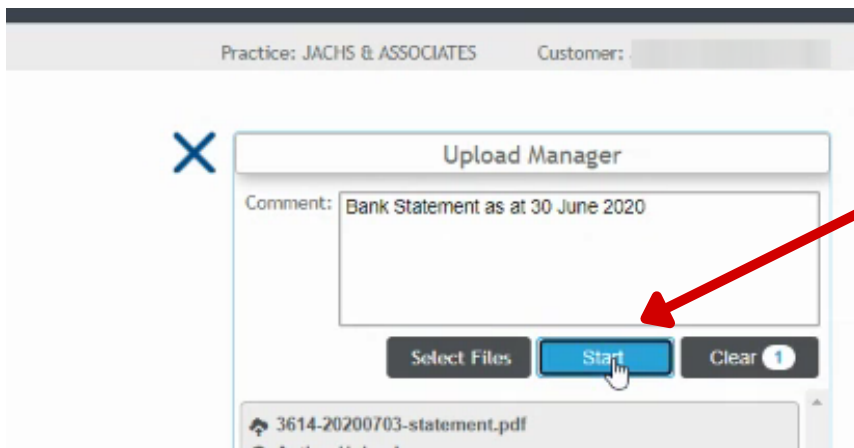
You can enter a comment in the Comments box to describe the file/s.



You can enter comments here about the documents, particularly if the document names are not very descriptive

STEP 6

Now click "Start" to upload the file to the portal.



Click the start button to upload the file



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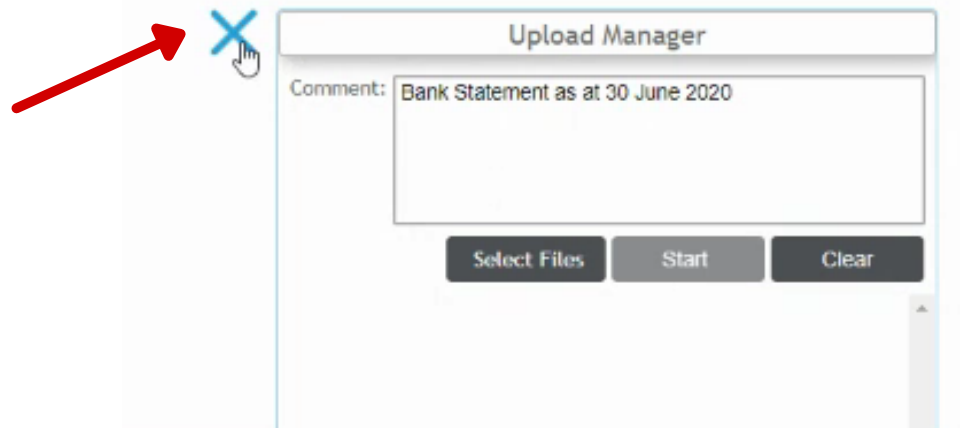
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You can repeat Steps 3 through 6 to upload more files, if necessary.

STEP 7

When you've finished, simply close the file upload window.

Click this X to close the Upload Manager window



STEP 8

You'll be able to see the documents you have uploaded in the Document Listing

