



## Client Portal User Guide

We are excited to have implemented such an innovative program for you to utilize for document management and communication with our firm. To ensure the easiest transition for you, we have put together a basic instruction guide for you to follow and get the most out of our client portal, CaseWare Collaborate. And as always, please feel free to contact Debbie at 970-223-2727 with any questions you might have.



### 1. Accessing the portal (after activation)

- In your web browser, type <https://us.casewarecloud.com/soukupbush>
- You may also access the portal by going to our website, [www.soukupbush.com](http://www.soukupbush.com) and selecting "Login" on the right side of the screen
- Your username will be your email address
- Your password will be the one we assigned you via email when we set up your account (it will prompt you to change it when you log in for the first time)
- If you forget your password, there is a link that will allow you to reset it


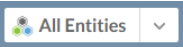
### 2. Accessing a specific company or person within the portal (for those that have multiple)


- At the top left corner of the screen, click the three horizontal lines, then click entities:  Entities
- Click or search for the company you would like to access or upload documents to
- If you would like to see all documents available to you for all companies/entities, click the drop-down button next to the three horizontal lines and click "All Entities" 

### 3. Downloading a document


- Click the three horizontal lines on the top left and then select "Files"  Files
- Select the entity you would like to download a document from by clicking the drop-down arrow next to the three horizontal lines
- To download, check the box next to the document you would like to download (you may download multiple documents at once)
- On the far right side of the screen, click the three dots 
- Select "Download" from the drop-down menu
- If you prefer to view the document in the internet browser, directly click the link of the document

### 4. Uploading your own documents


- Click the three horizontal lines, and then select "Files"  Files
- You must select the entity you would like to upload files for by clicking the drop-down arrow next to "All Entities" 

- c) Select “New”  and then in the dropdown screen, select “Upload”
- d) Either click “Select Files” and search for the documents you would like to upload, or click and drag documents from your desktop or folder into the box saying “or drag & drop files here” (multiple files may either be selected or dragged in, but entire folders may not be selected). Please note the drag and drop feature does not work with every internet browser.
- e) Upload begins immediately

#### 5. To change your password

- a) In the top right corner, click your initials in the circle. 
- b) In the drop-down menu select “My Settings”
- c) On the left side select “Account Settings”
- d) You will be asked to type your current password, then your new password twice
- e) Please note – you cannot change your password to any of your previous ten passwords

#### 6. To log out of CaseWare Collaborate

- a) In the top right corner, click your initials in the circle. 
- b) In the drop-down menu select “Sign out”

#### 7. Additional Considerations

- a) Our portal will not work with older versions of Internet Explorer (anything before I.E. 10)
- b) We typically delete documents and other items uploaded to us for purposes of completing your tax return and/or other project needs. If this is something you do not want us to do, please let us know prior to uploading.
- c) If an item is accidentally deleted, we can retrieve it until December 31<sup>st</sup> of the calendar year it was uploaded.
- d) We will upload tax returns and other completed documents to you. These will be automatically deleted after five years of being uploaded.