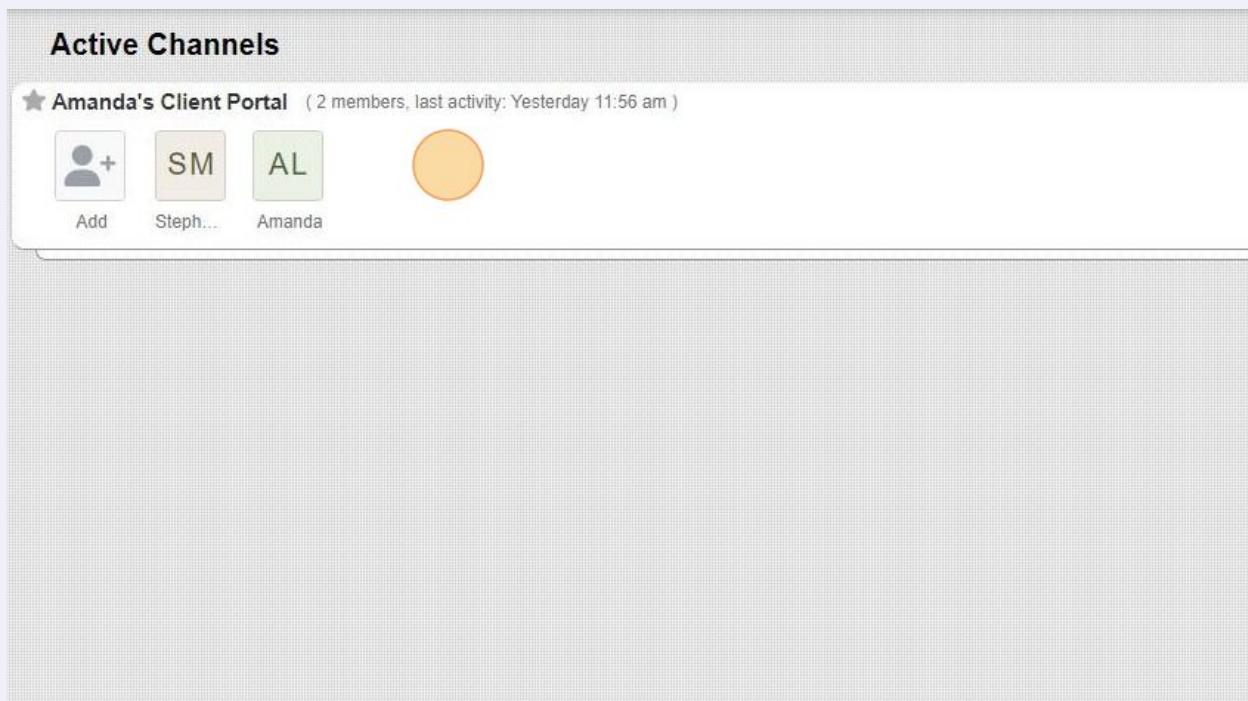


How to Navigate the Crowe Soberman Client Portal

1 Navigate to <https://crowesoberman.titanfile.com/login/> to login and access your account.

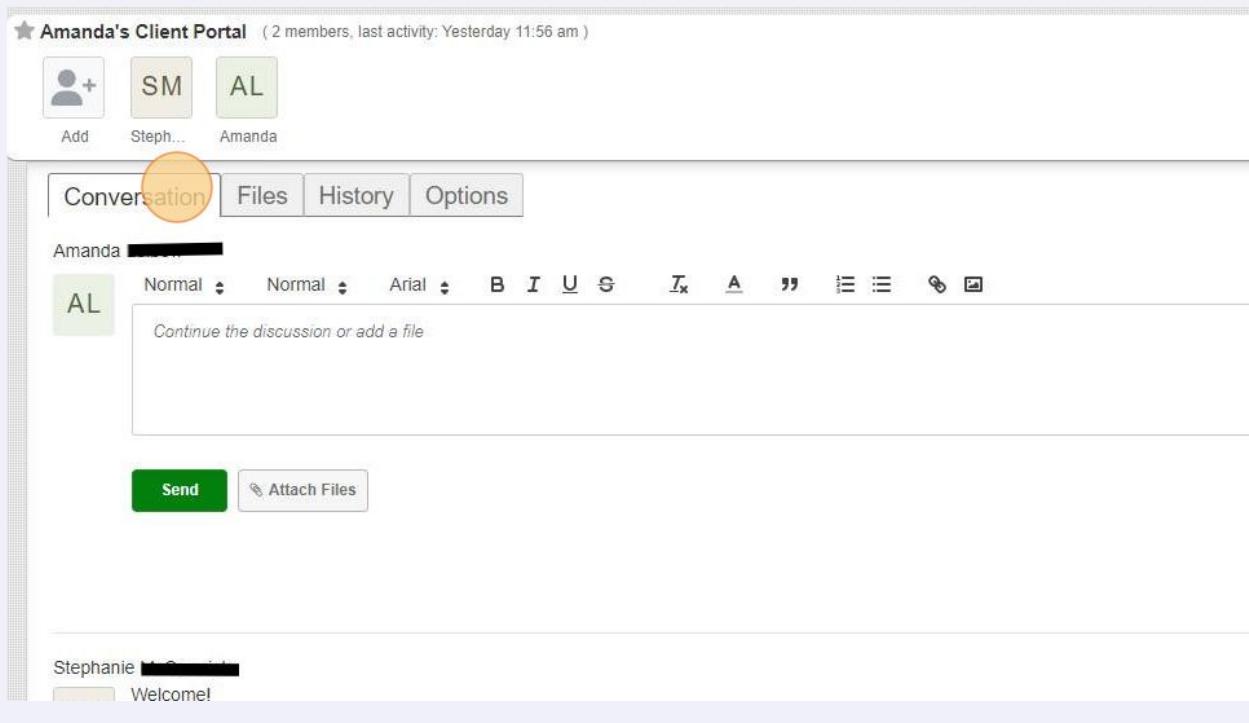
2 You will be able to see all members of your portal by looking at the squares in the white bar.

To enter the portal, click on the white bar under 'Active Channels'.



3

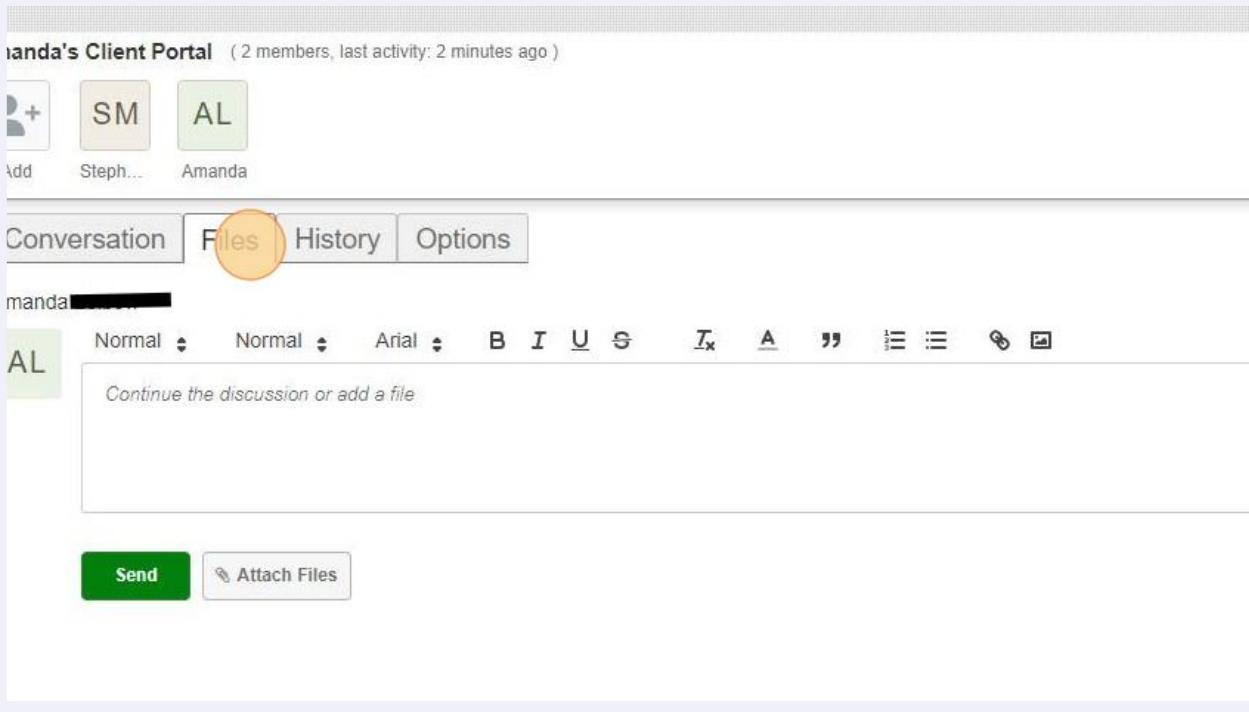
The Conversation tab will show your conversation history with the members of your portal.



The screenshot shows the 'Conversation' tab selected in the top navigation bar of 'Amanda's Client Portal'. The tab bar also includes 'Files', 'History', and 'Options'. The main area shows a conversation between 'Amanda' and 'Steph...'. A message from 'Amanda' is visible, and a message from 'Steph...' is shown with the text 'Welcome!'. Below the messages is a text input field with the placeholder 'Continue the discussion or add a file'. At the bottom are 'Send' and 'Attach Files' buttons.

4

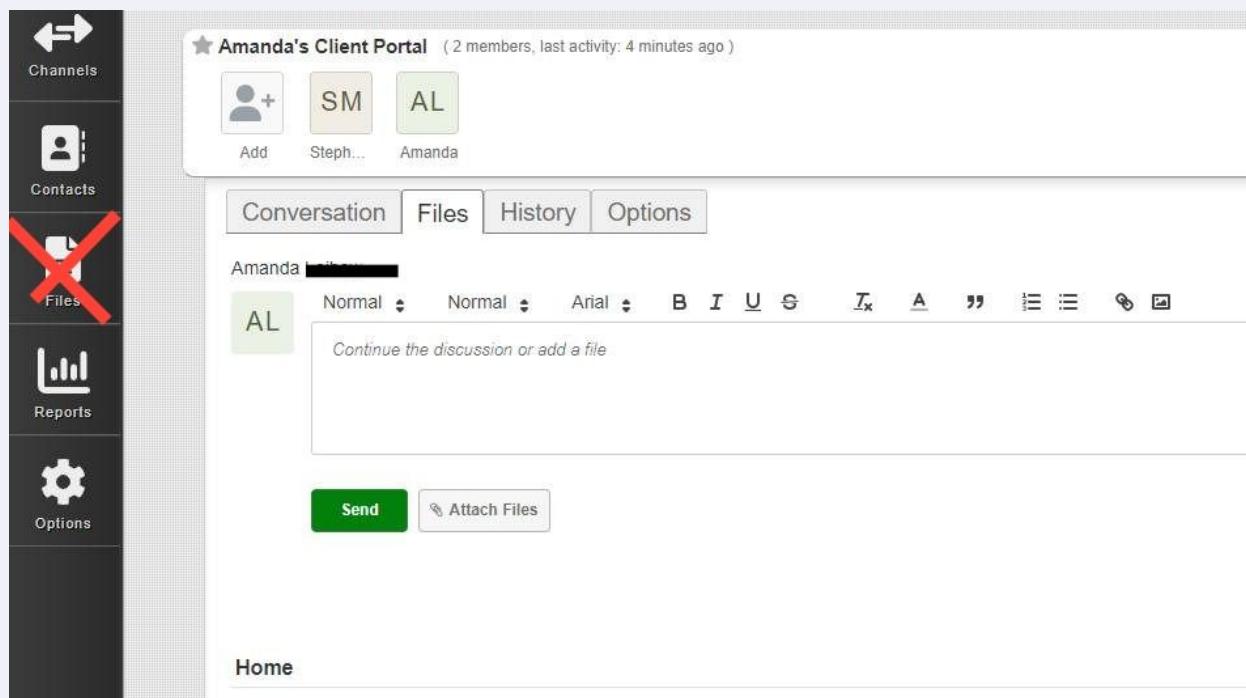
To upload a document to your portal, navigate to the Files tab.



The screenshot shows the 'Files' tab selected in the top navigation bar of 'Amanda's Client Portal'. The tab bar also includes 'Conversation', 'History', and 'Options'. The main area shows a conversation between 'Amanda' and 'Steph...'. A message from 'Amanda' is visible, and a message from 'Steph...' is shown with the text 'Welcome!'. Below the messages is a text input field with the placeholder 'Continue the discussion or add a file'. At the bottom are 'Send' and 'Attach Files' buttons.

5

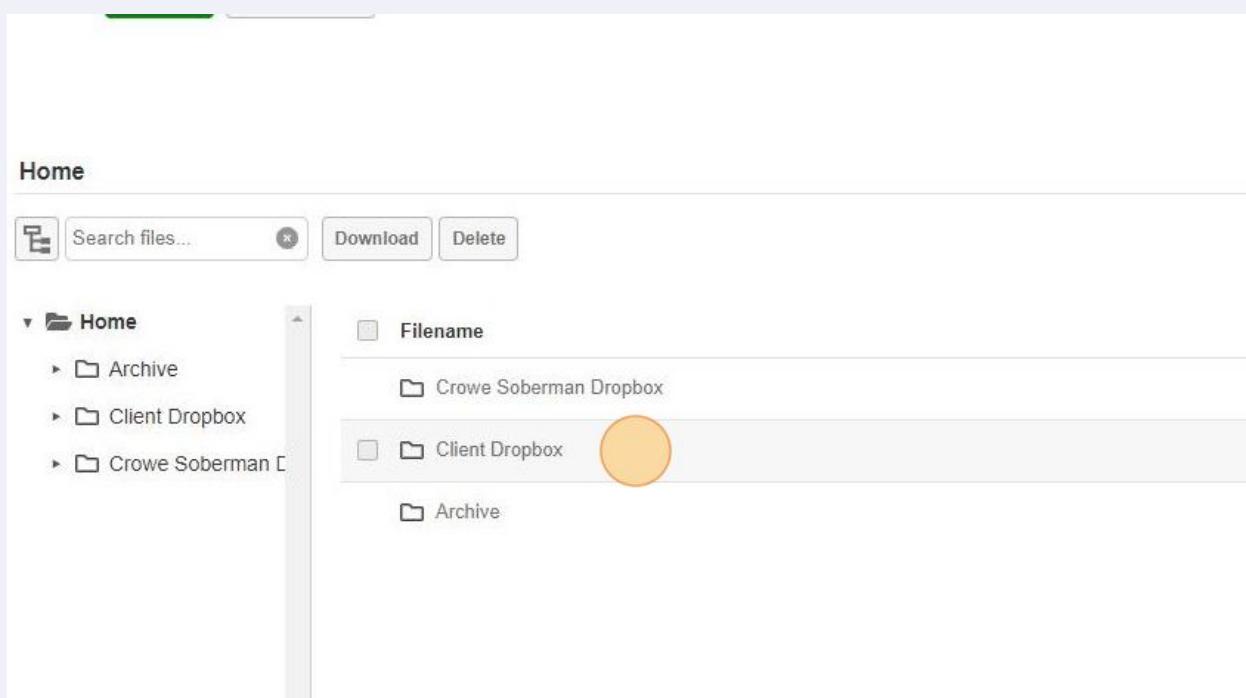
Note: Please do NOT click on the Files tab in the black left sidebar.



6

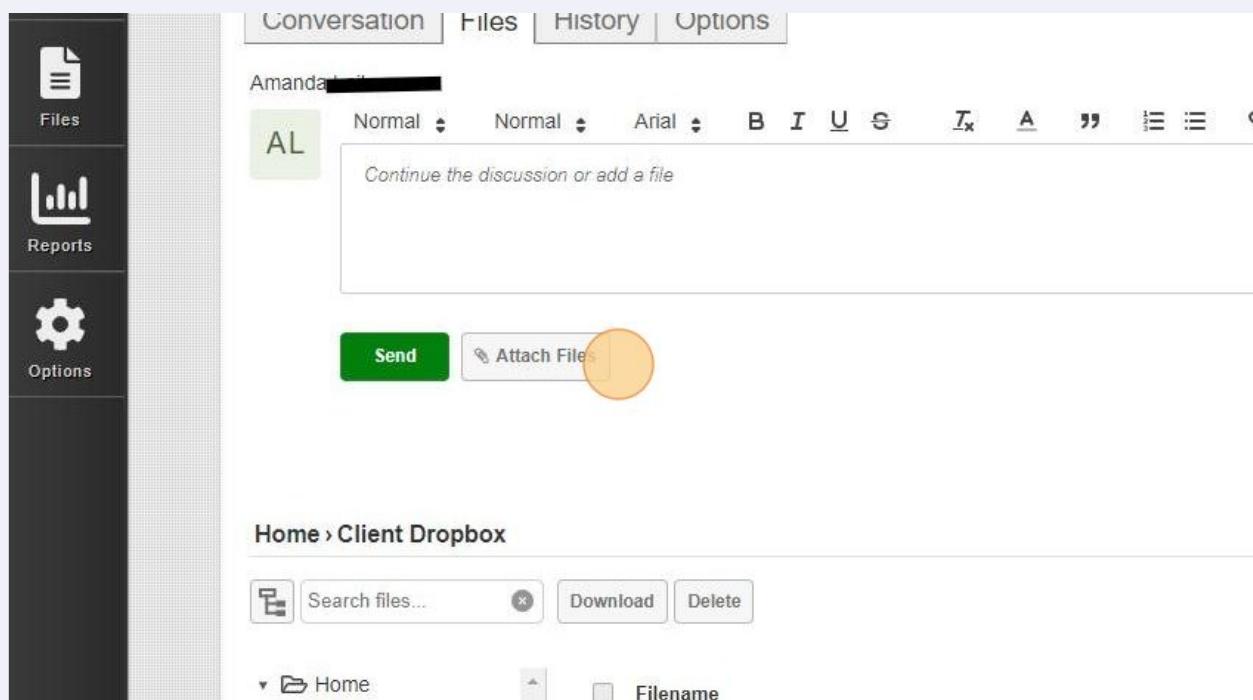
There are two ways to upload a document to your portal.

Please start by double clicking into 'Client Dropbox' to ensure documents are organized.



7

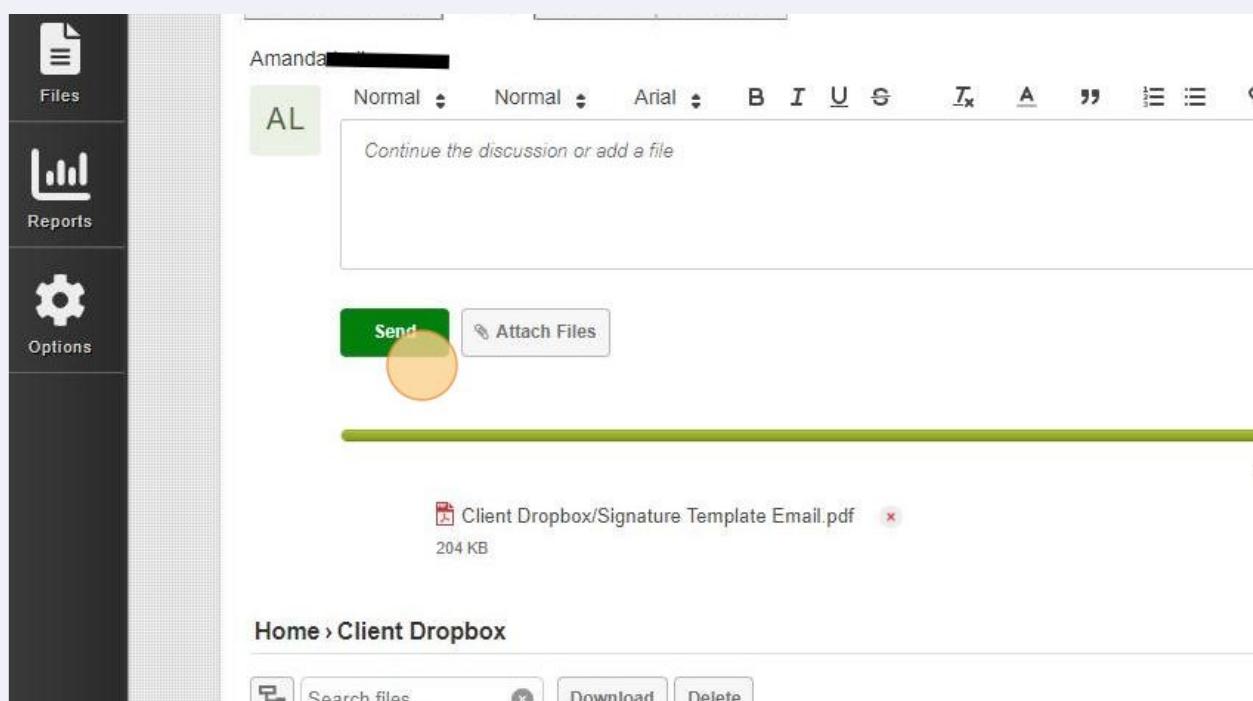
The first method for uploading a file is to simply click the 'Attach Files' button and select the file(s) you would like to upload.



A screenshot of a communication interface. At the top, there are tabs: Conversation, Files (which is selected), History, and Options. Below the tabs, the recipient is listed as 'Amanda [REDACTED]'. The message area shows the text 'AL' and a placeholder 'Continue the discussion or add a file'. At the bottom of the message area are two buttons: 'Send' (green) and 'Attach Files' (gray). The 'Attach Files' button is highlighted with a yellow circle. Below the message area, the interface transitions to a 'Client Dropbox' section. It shows a list with one item: 'Client Dropbox/Signature Template Email.pdf' (204 KB). At the bottom of this section are buttons for 'Search files...', 'Download', and 'Delete'.

8

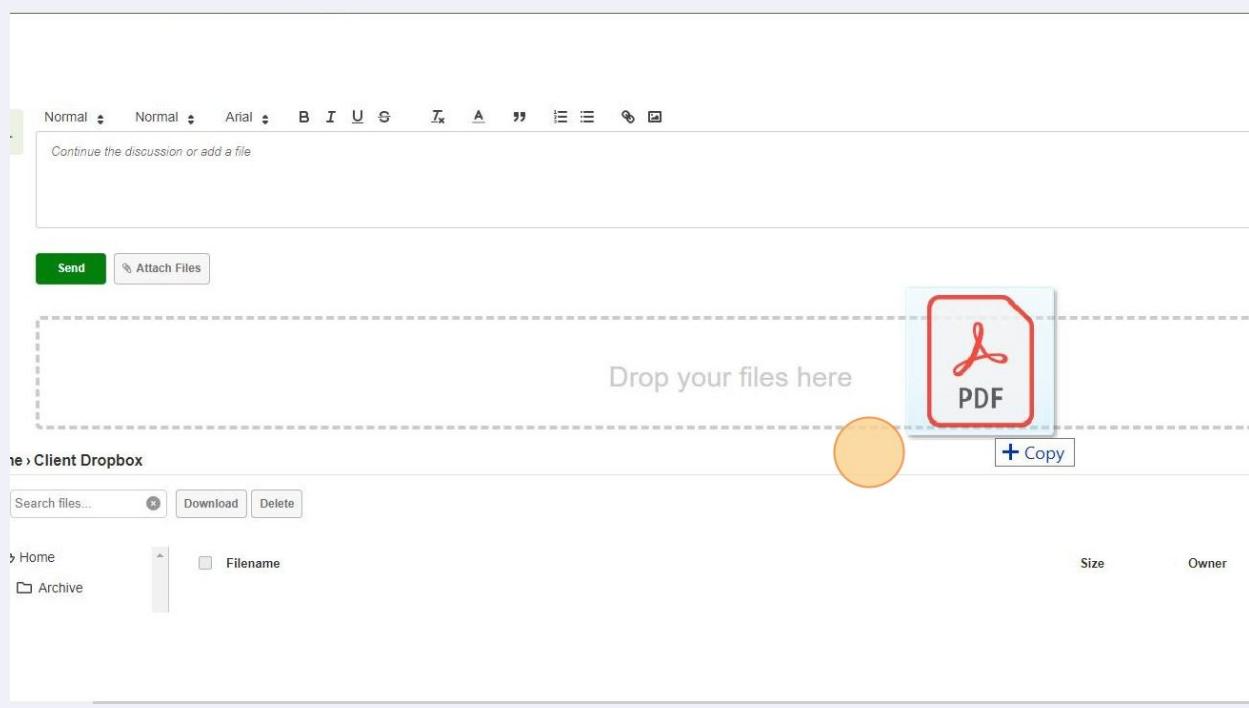
Once you have attached the file, you have to click the green 'Send' button. If you do not click this button, the file will not upload.



A screenshot of the same communication interface as the previous image. The message area shows the text 'AL' and a placeholder 'Continue the discussion or add a file'. At the bottom of the message area are two buttons: 'Send' (green) and 'Attach Files' (gray). The 'Send' button is highlighted with a yellow circle. Below the message area, the interface transitions to a 'Client Dropbox' section. It shows a list with one item: 'Client Dropbox/Signature Template Email.pdf' (204 KB). At the bottom of this section are buttons for 'Search files...', 'Download', and 'Delete'.

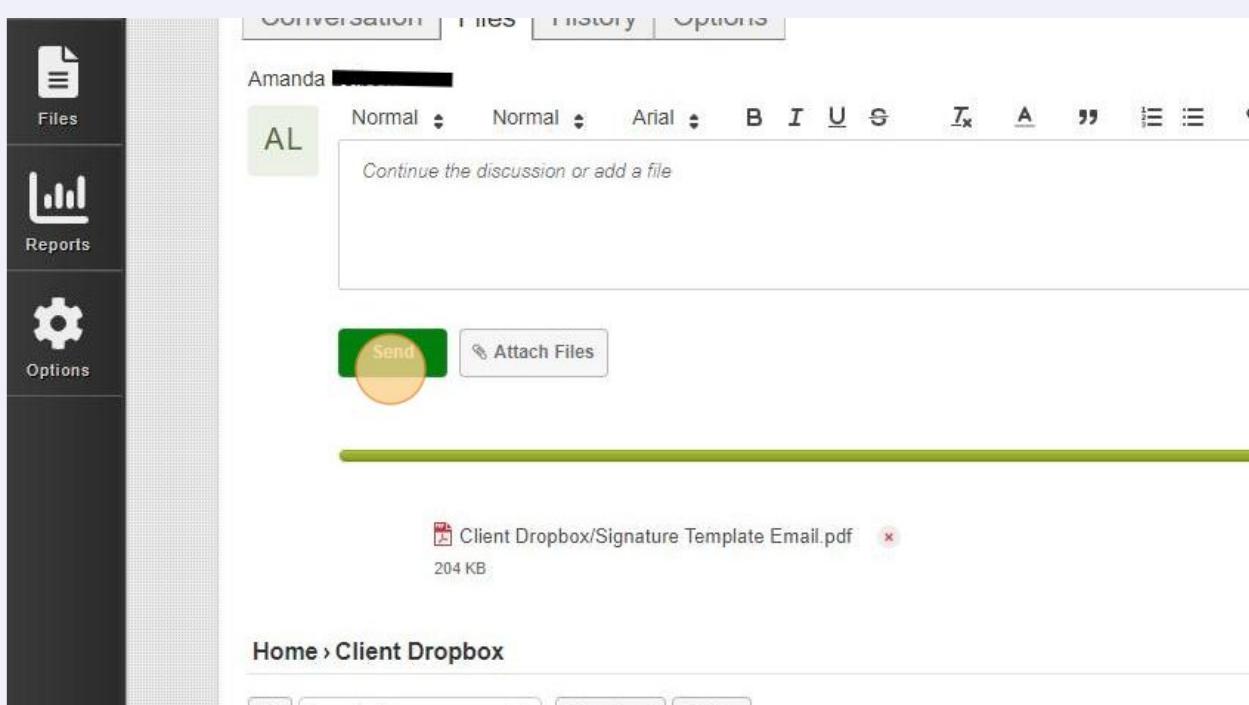
9

The second method for uploading a file is to drag and drop the file into the Client Dropbox.



10

Once again, don't forget to click the green 'Send' button or your file will not upload.





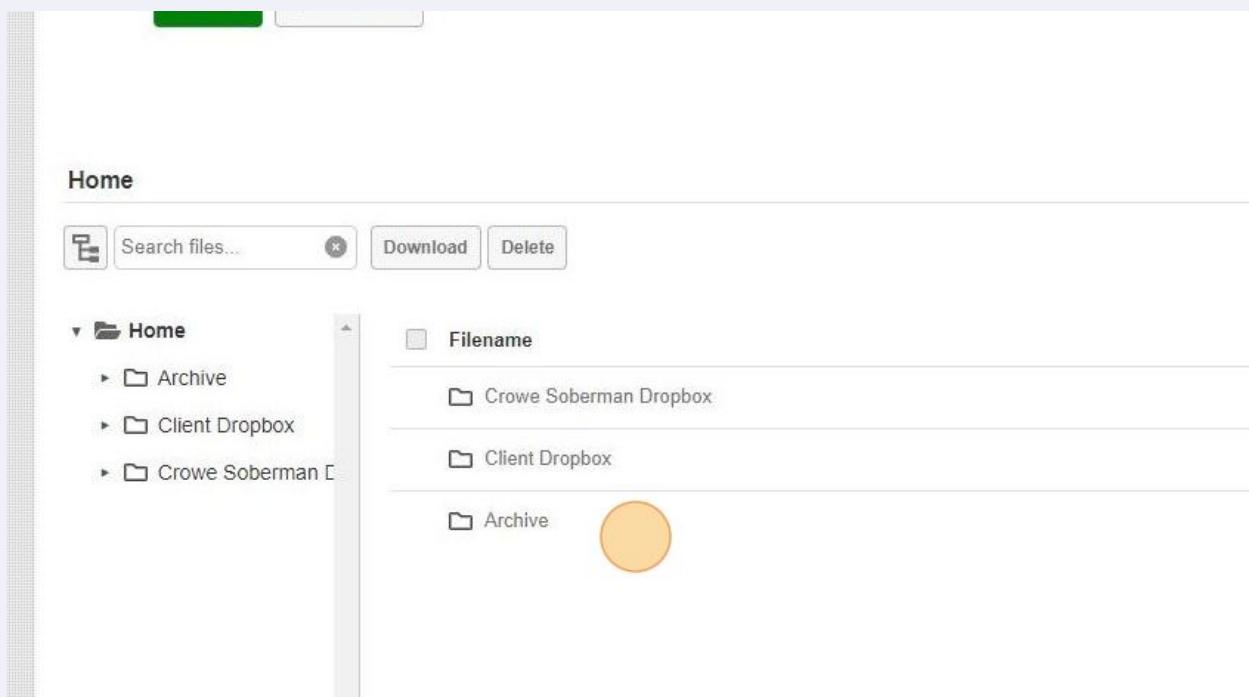
Note: You cannot send a message or document to only one person in your portal. Anything you upload is automatically sent to everyone in the portal.

If you would like a document sent to one specific individual at Crowe Soberman, we will need to create a new portal channel with only you and said Crowe Soberman contact.

11

Further, files in the 'Crowe Soberman Dropbox' and 'Client Dropbox' will expire after 18 months.

Financial statements or tax returns are stored in the 'Archive' folder, which does not have an expiry date. To view past statements and/or returns, click into the 'Archive' folder.

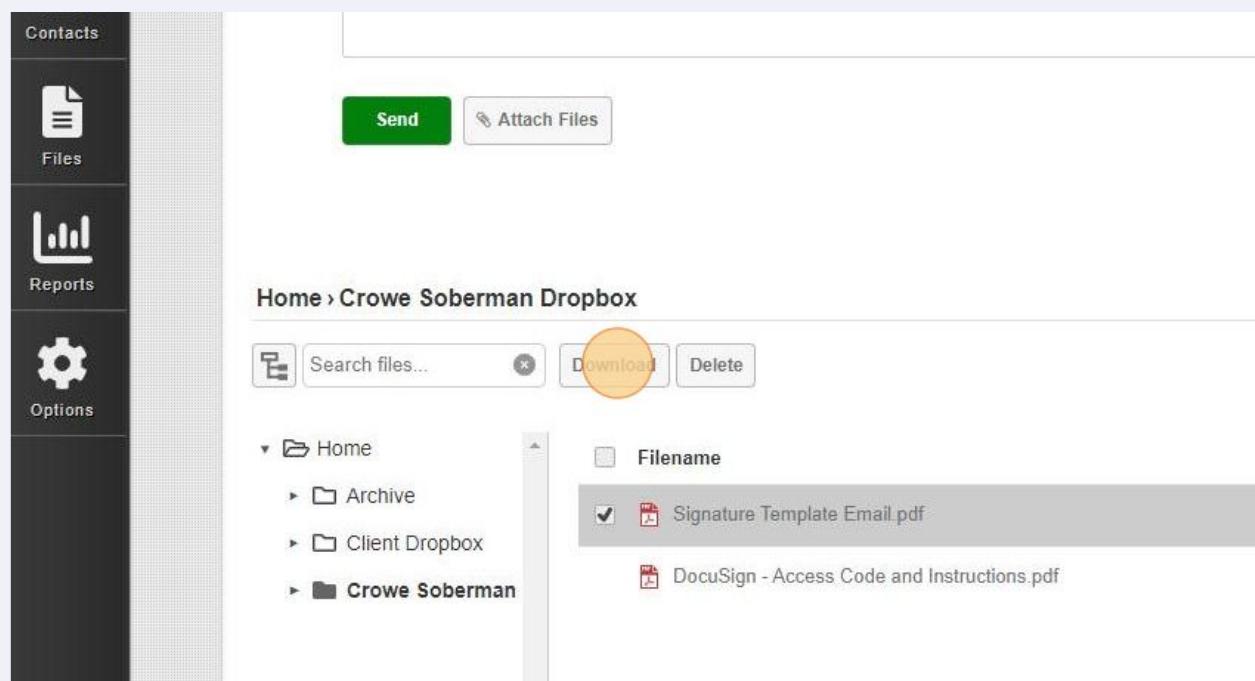


12

To download a file, click on the checkbox next to the file and click 'Download'.

To download multiple files, select the checkbox of all files you wish to download and click 'Download'.

Finally, to download all of your files, select the checkbox next to 'Filename' and click 'Download'.

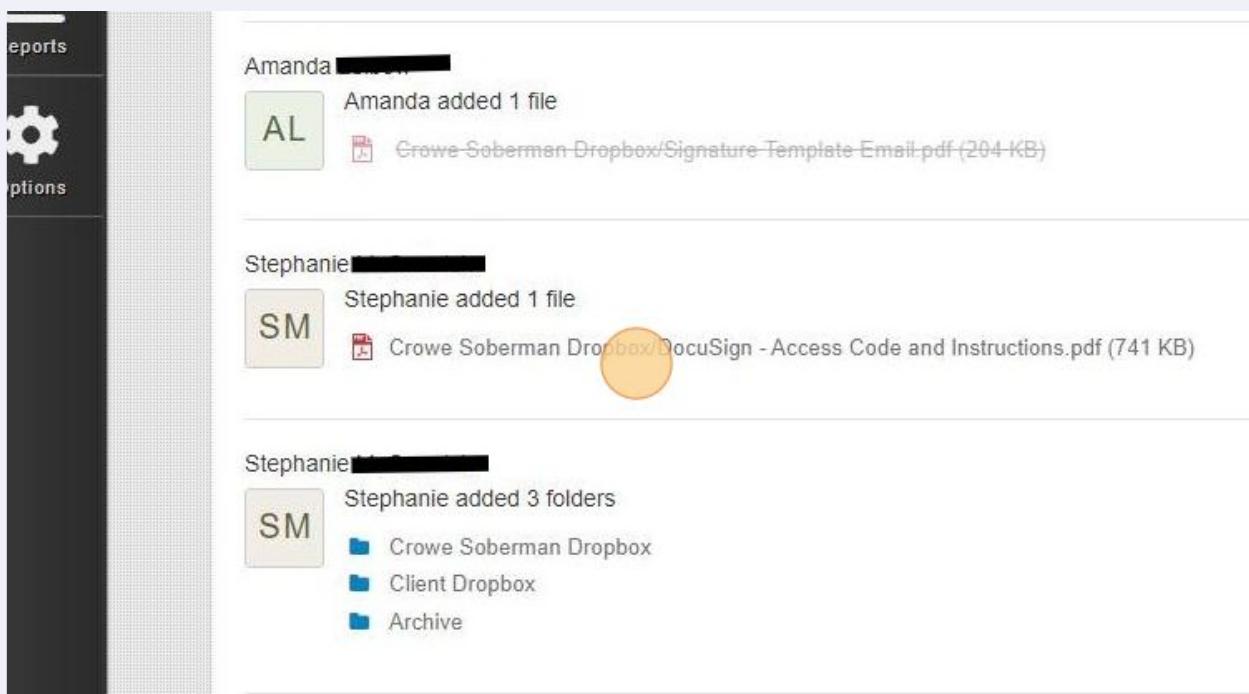


To delete a file, copy the step above, but click 'Delete' instead of 'Download'.

13

You can also download a file from the Conversations tab by clicking on the file.

To download multiple files at once, hover your mouse over the files and click the 'Download all' button that appears to the right of the files.

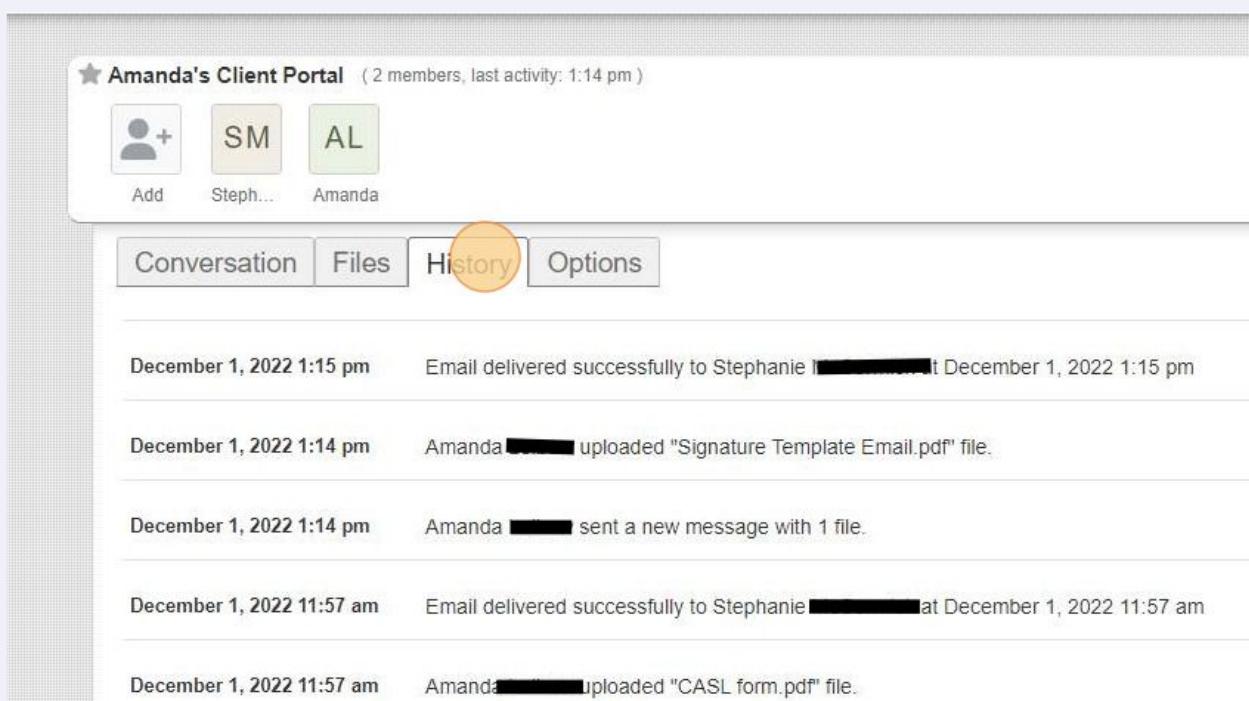


The screenshot shows the 'Conversations' tab in a client portal. It displays three messages:

- Amanda [REDACTED]** added 1 file: [Crowe Soberman Dropbox/Signature Template Email.pdf](#) (204 KB)
- Stephanie [REDACTED]** added 1 file: [Crowe Soberman Dropbox/DocuSign - Access Code and Instructions.pdf](#) (741 KB)
- Stephanie [REDACTED]** added 3 folders:
 - [Crowe Soberman Dropbox](#)
 - [Client Dropbox](#)
 - [Archive](#)

14

To review the history of interactions through your client portal, navigate to the History tab.



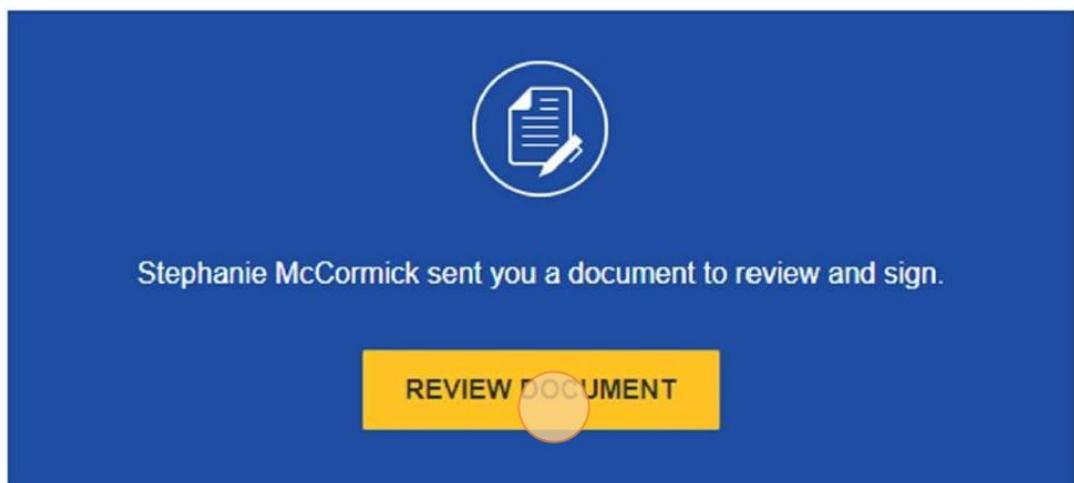
The screenshot shows the 'History' tab in the client portal. The timeline of interactions is as follows:

- December 1, 2022 1:15 pm: Email delivered successfully to Stephanie [REDACTED] at December 1, 2022 1:15 pm.
- December 1, 2022 1:14 pm: Amanda [REDACTED] uploaded "Signature Template Email.pdf" file.
- December 1, 2022 1:14 pm: Amanda [REDACTED] sent a new message with 1 file.
- December 1, 2022 11:57 am: Email delivered successfully to Stephanie [REDACTED] at December 1, 2022 11:57 am.
- December 1, 2022 11:57 am: Amanda [REDACTED] uploaded "CASL form.pdf" file.

15

If there is a document that requires your signature, you will receive an email with the below image. Click 'REVIEW DOCUMENT'.

DocuSign



16

Enter the access code that is contained in the message from the sender of the document(s). The code will be in your portal in the Conversations tab. Click 'Validate'.

Please enter the access code to view the document



Stephanie [REDACTED]
Crowe Soberman



The sender has requested you enter a secret access code prior to reviewing the document. You should have received an access code in a separate communication. Please enter the code and validate it in order to proceed to viewing the document.

Access Code

VALIDATE

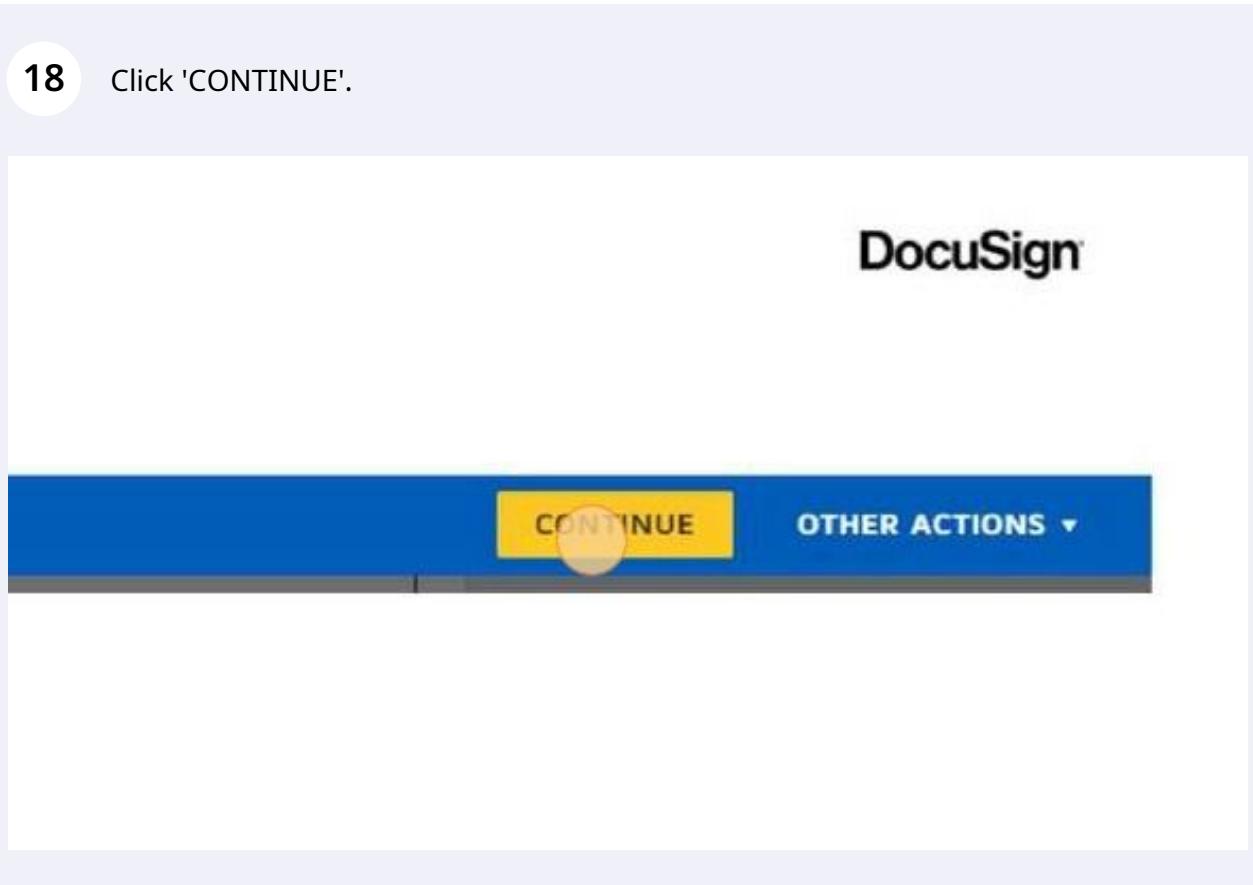
I NEVER RECEIVED AN ACCESS CODE

Show Text

17 Check the box to agree to the terms and conditions.



18 Click 'CONTINUE'.



19

Follow the yellow prompts on the document to sign and submit the document.

Once all parties have signed, you will receive an email notification with a link to view the completed document.

20

Finally, if you are logged into your client portal and are experiencing technical difficulties, your session has likely 'timed-out'.

Navigate back to <https://crowesoberman.titanfile.com/login/> to sign back in.

