

How to Navigate the Crowe Soberman Client Portal

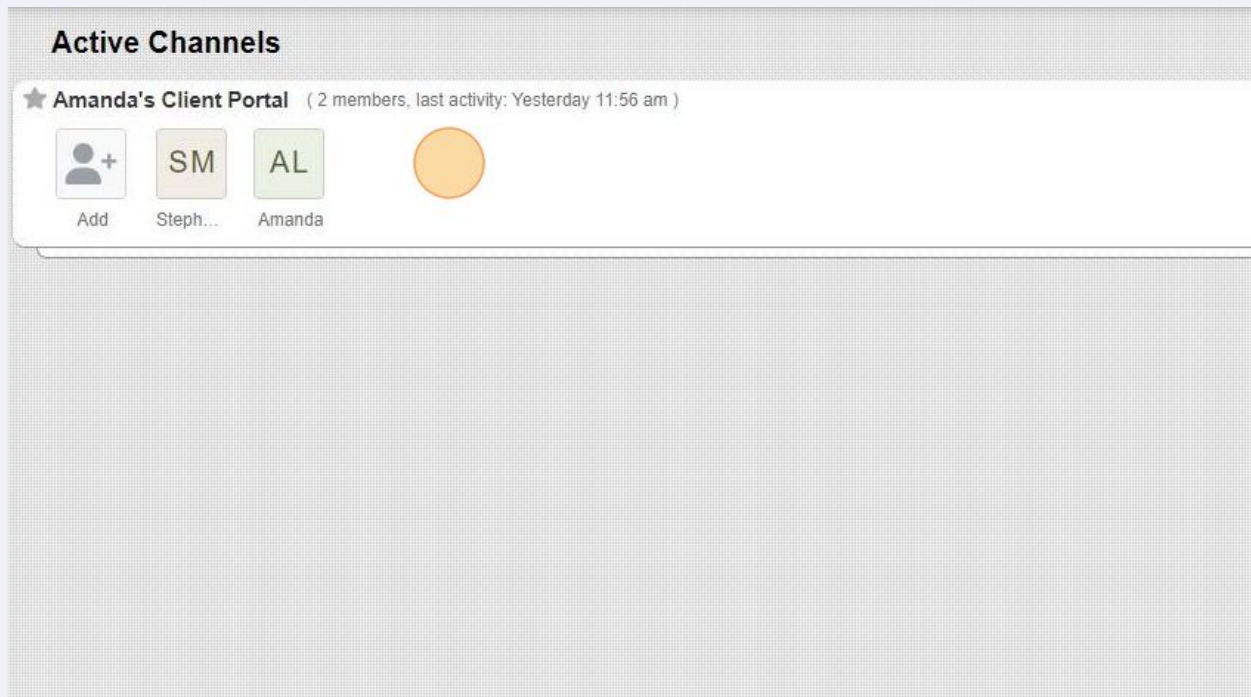
1

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

2

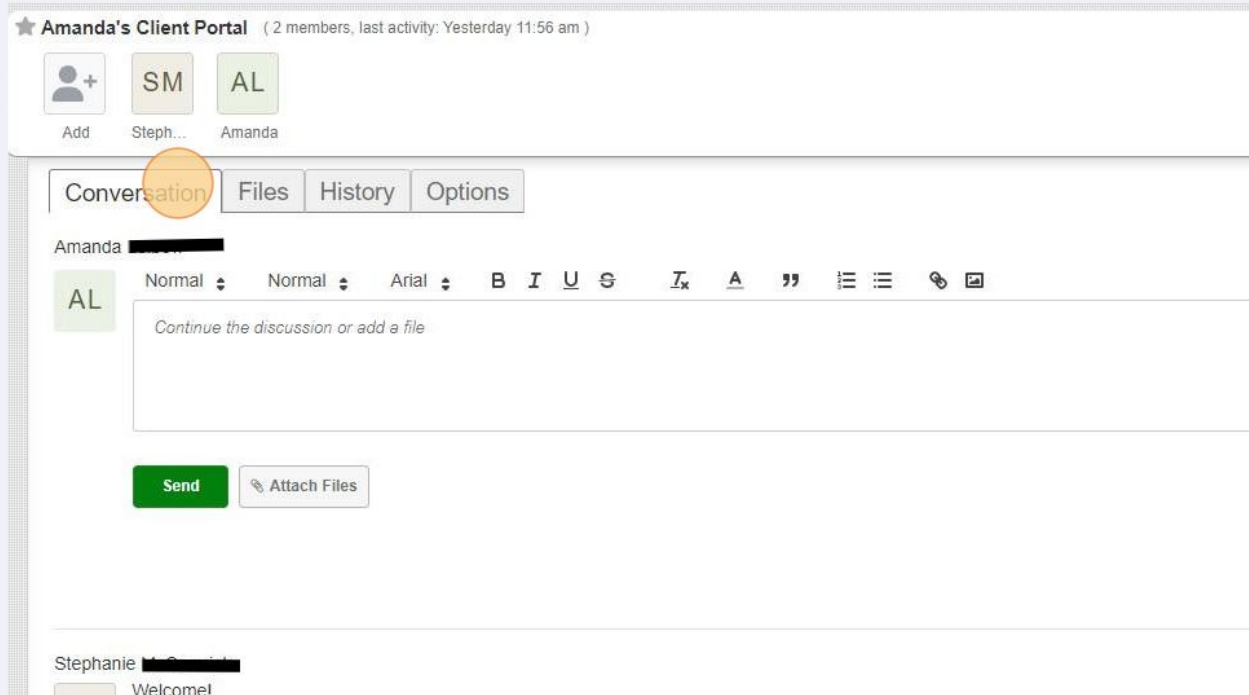
You will be able to see all members of your portal by looking at the squares in the white bar.

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



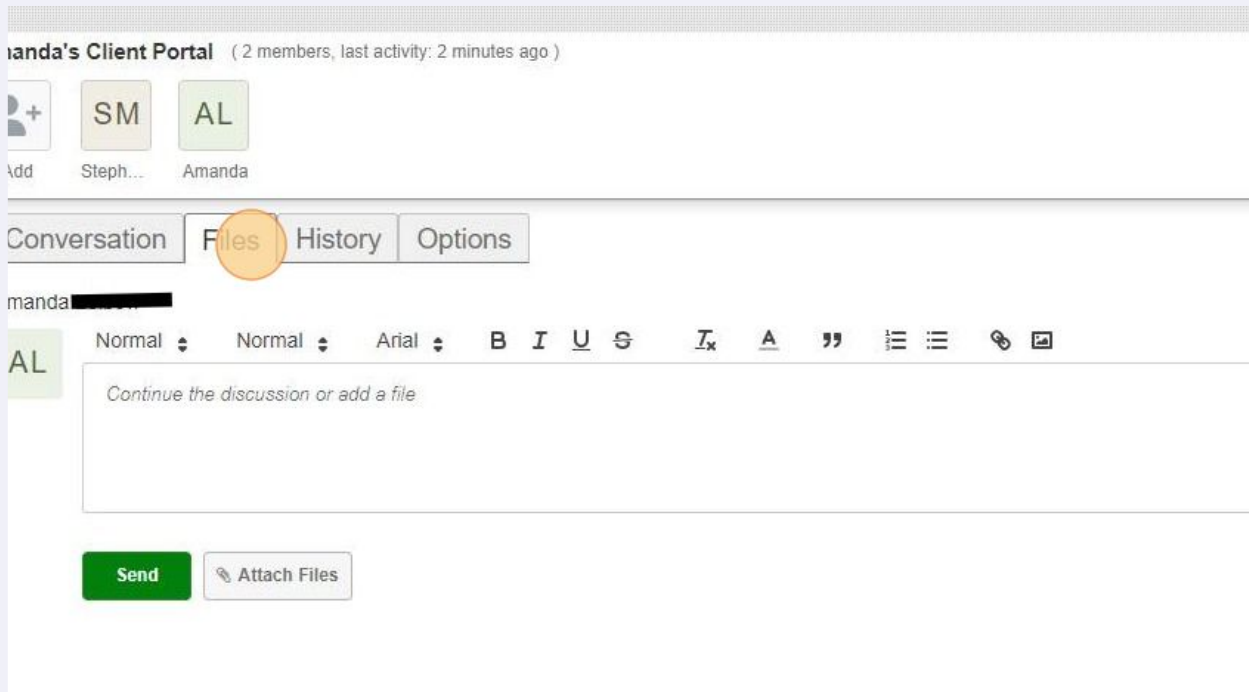
3

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



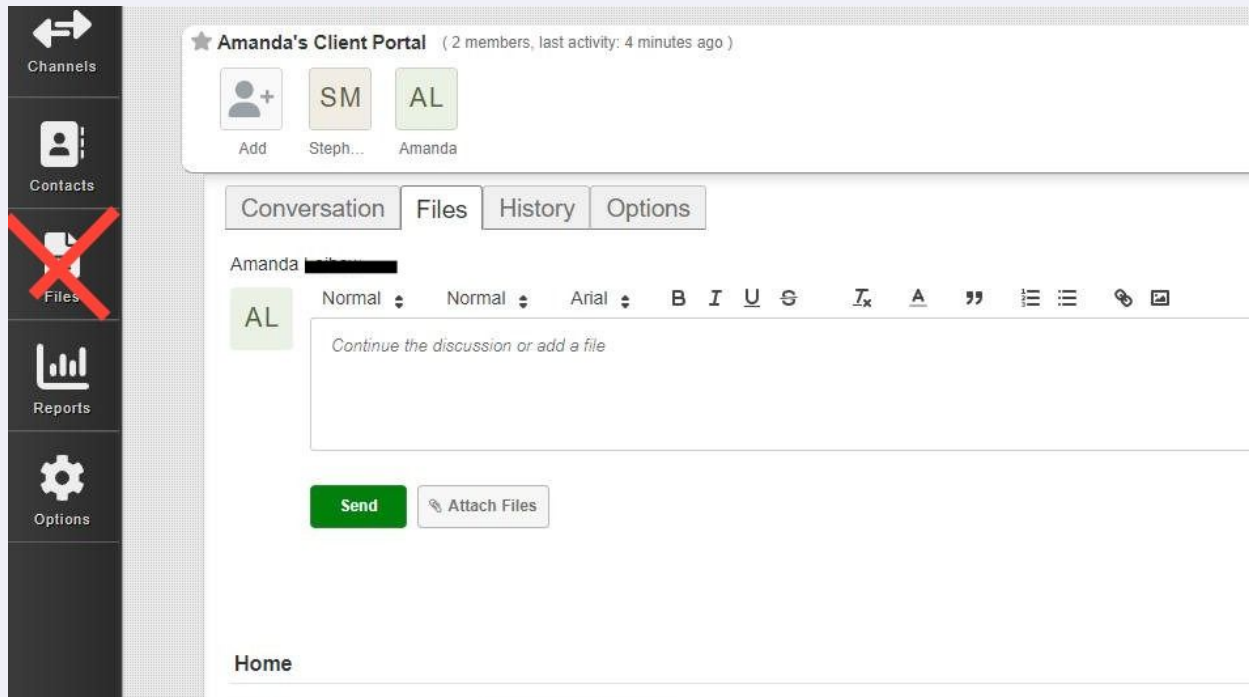
4

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



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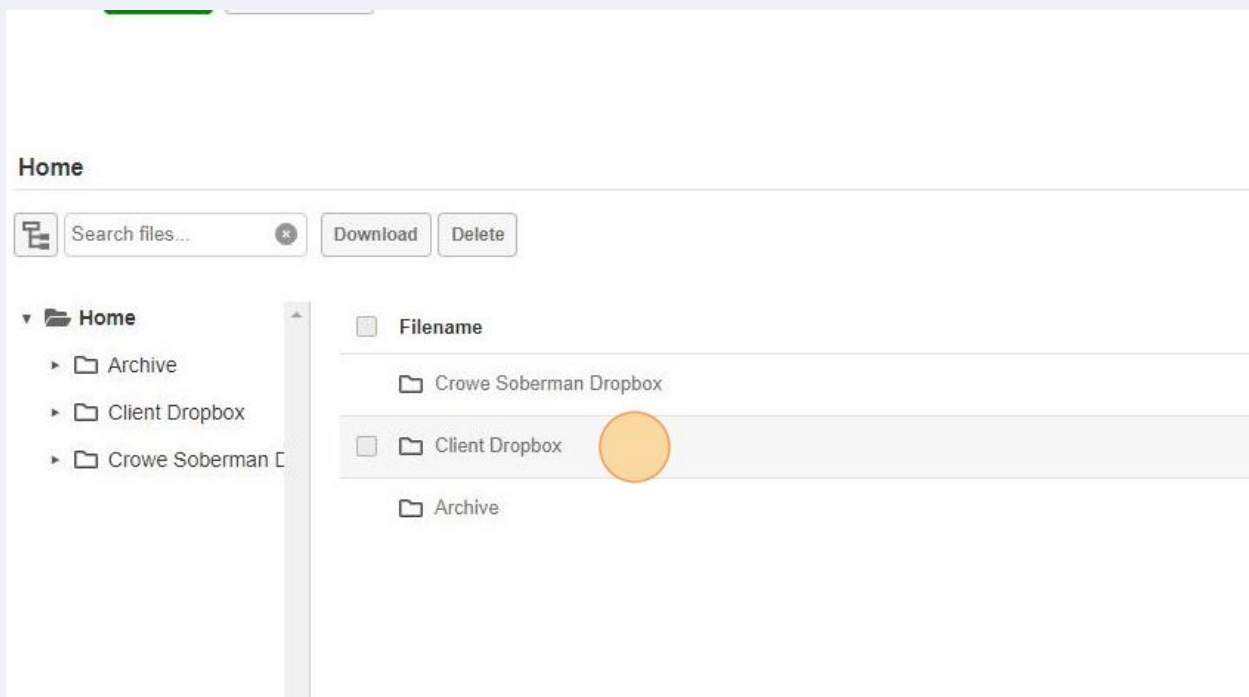
Note: Please do NOT click on the Files tab in the black left sidebar.



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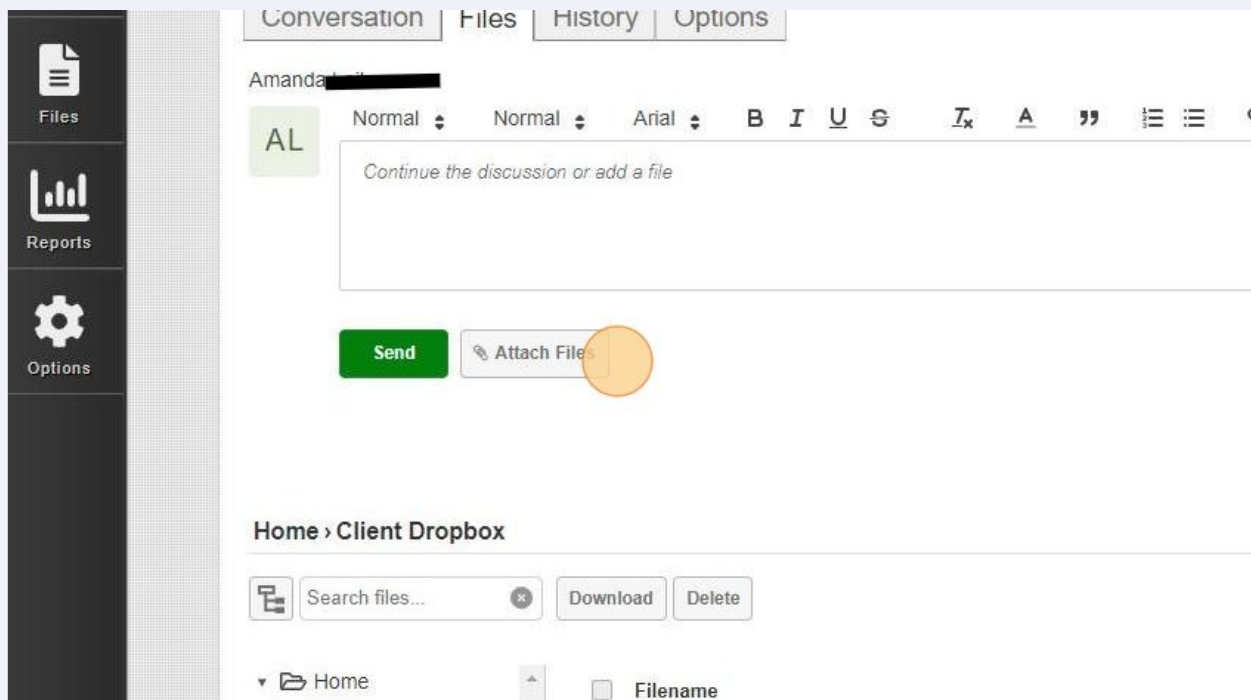
There are two ways to upload a document to your portal.

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



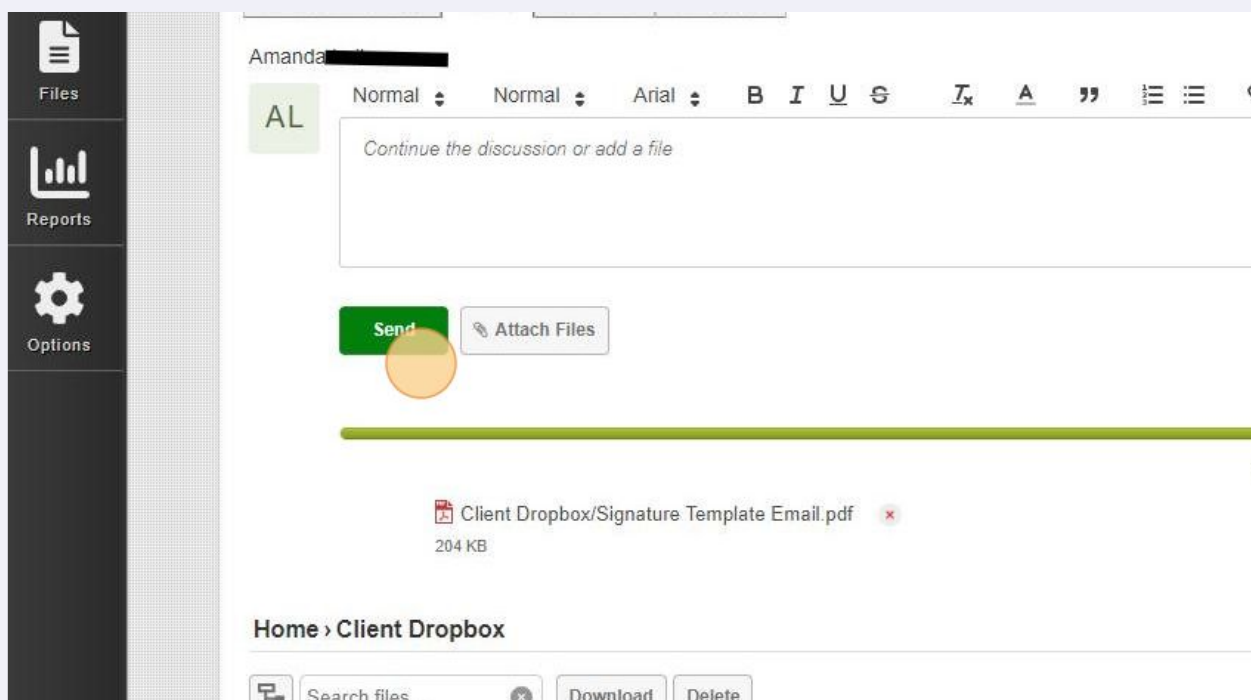
7

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.



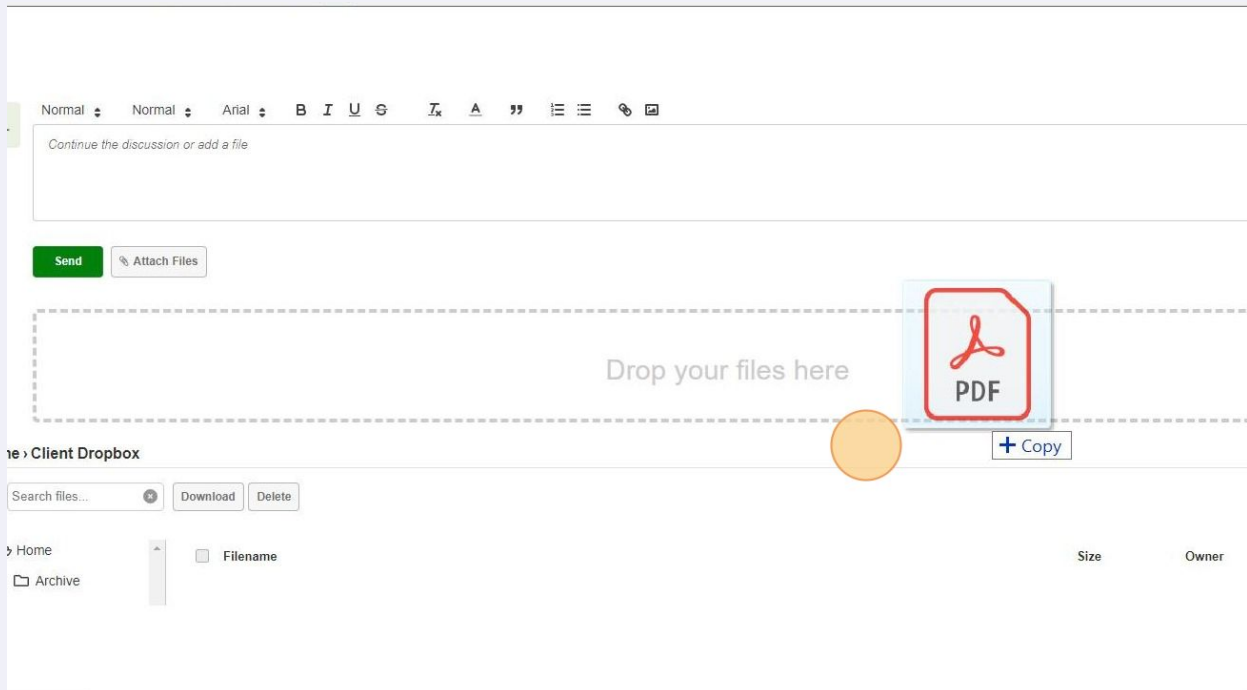
8

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.



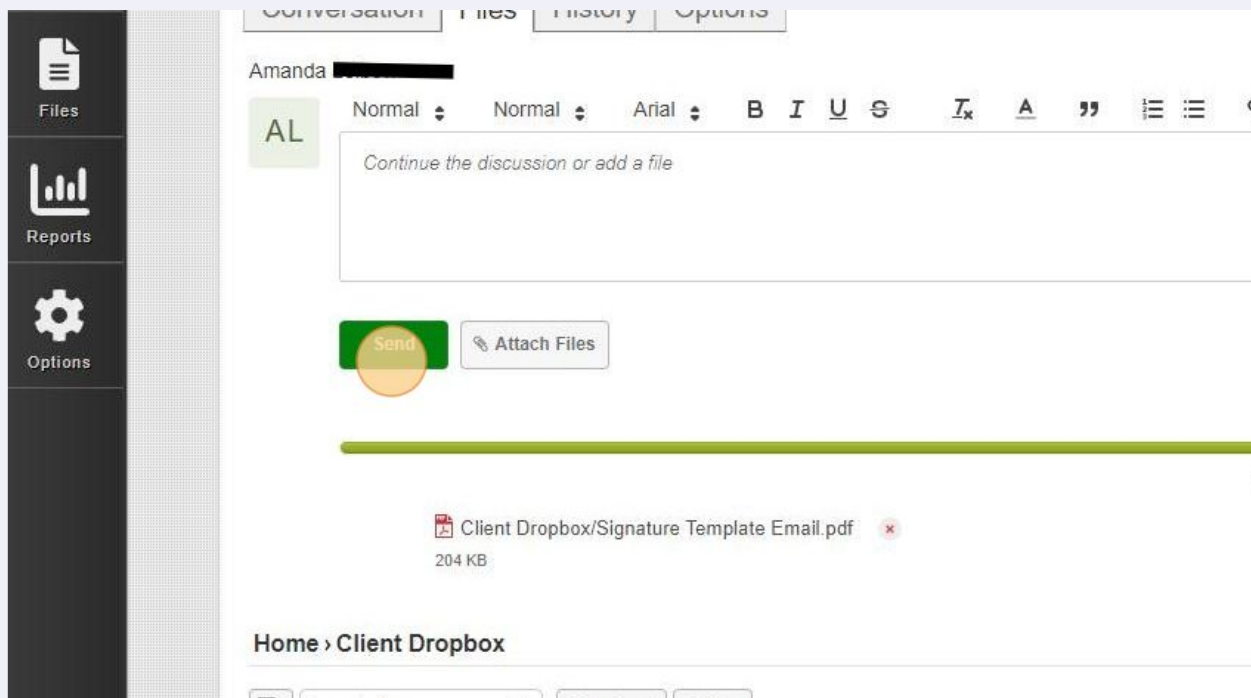
9

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



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





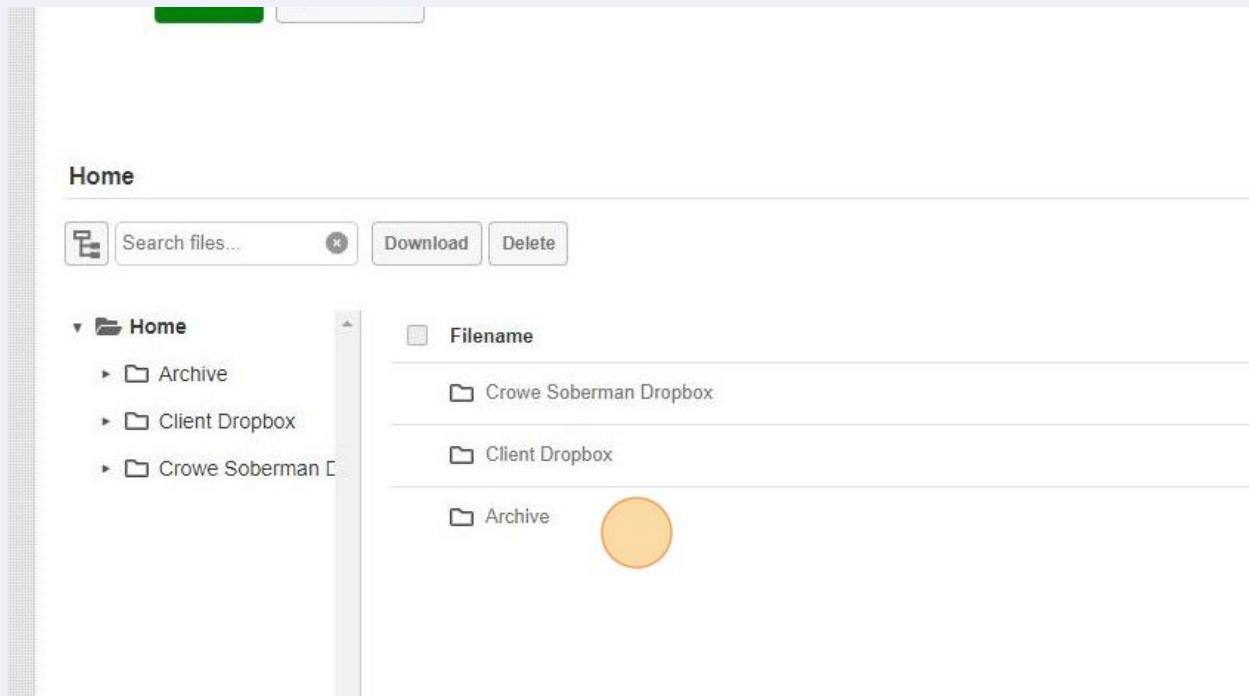
Note: You cannot send a message or document to only one person in your portal. Anything you upload is automatically sent to everyone in the portal.

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.

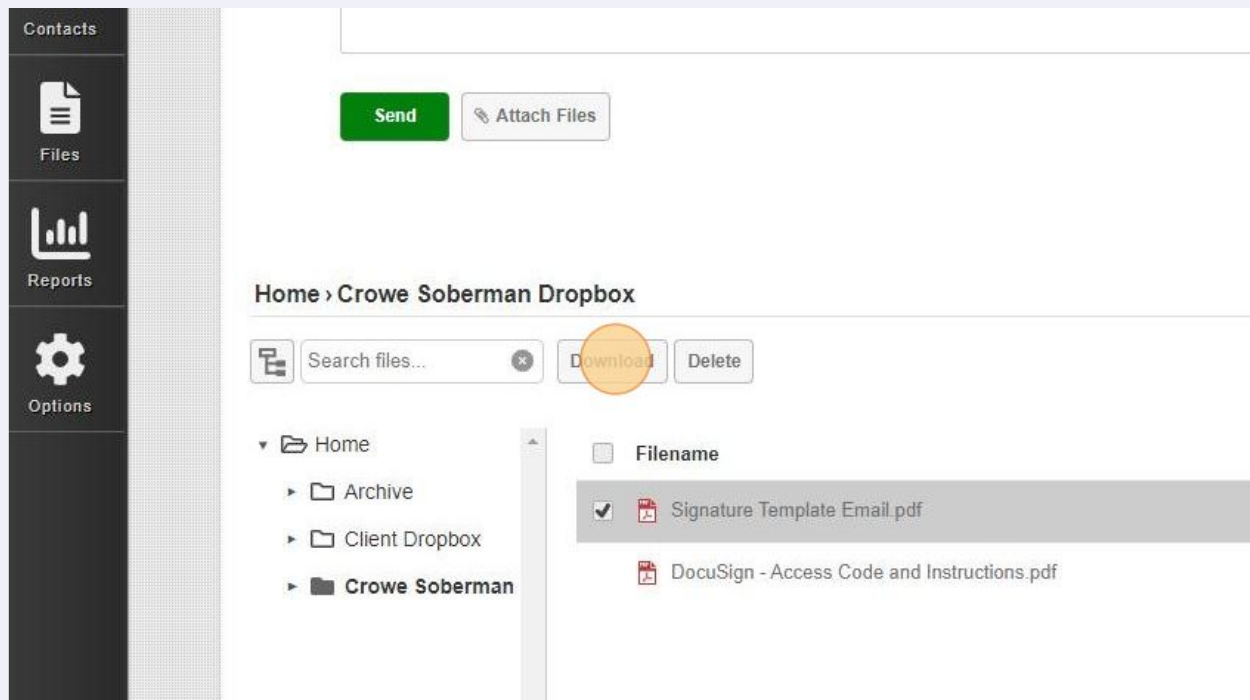


12

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'.

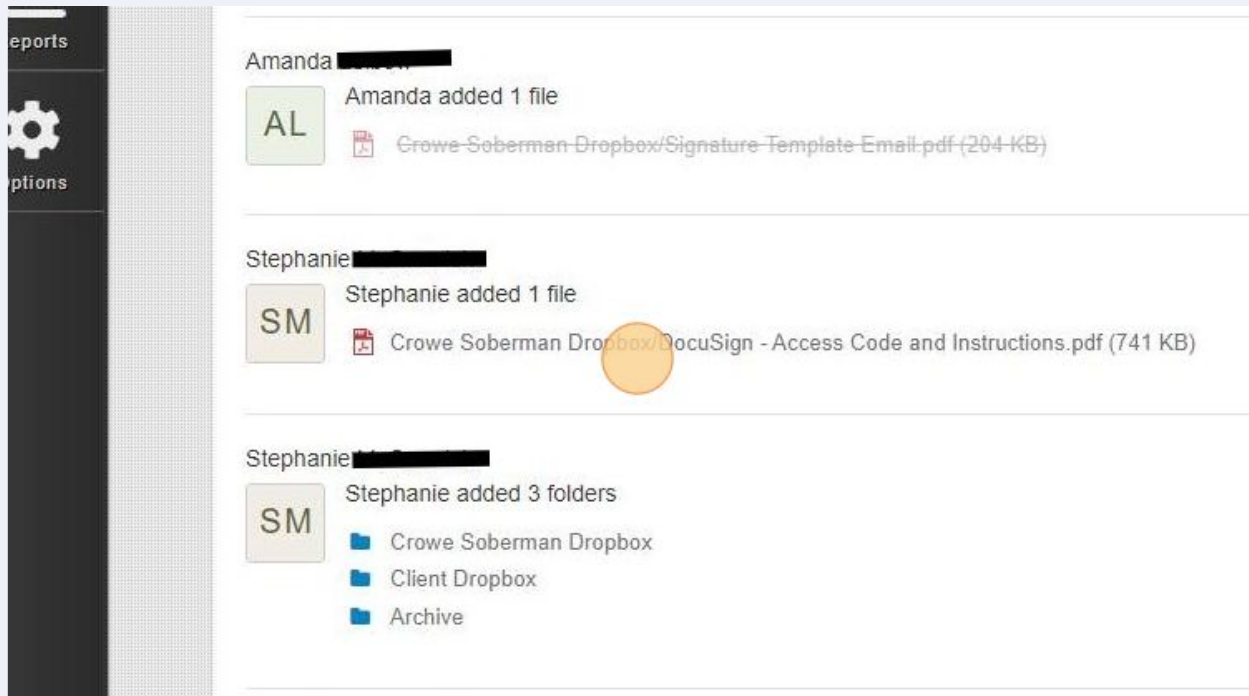


To delete a file, copy the step above, but click 'Delete' instead of 'Download'.

13

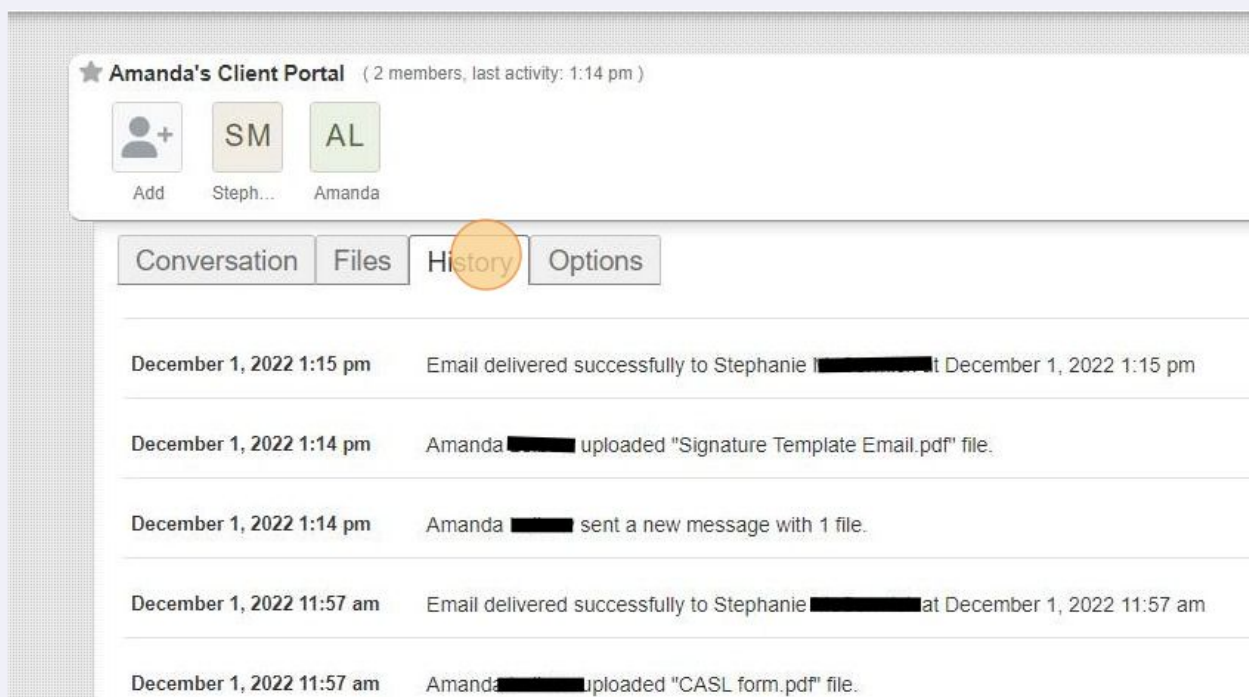
You can also download a file from the Conversations tab by clicking on the file.

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.

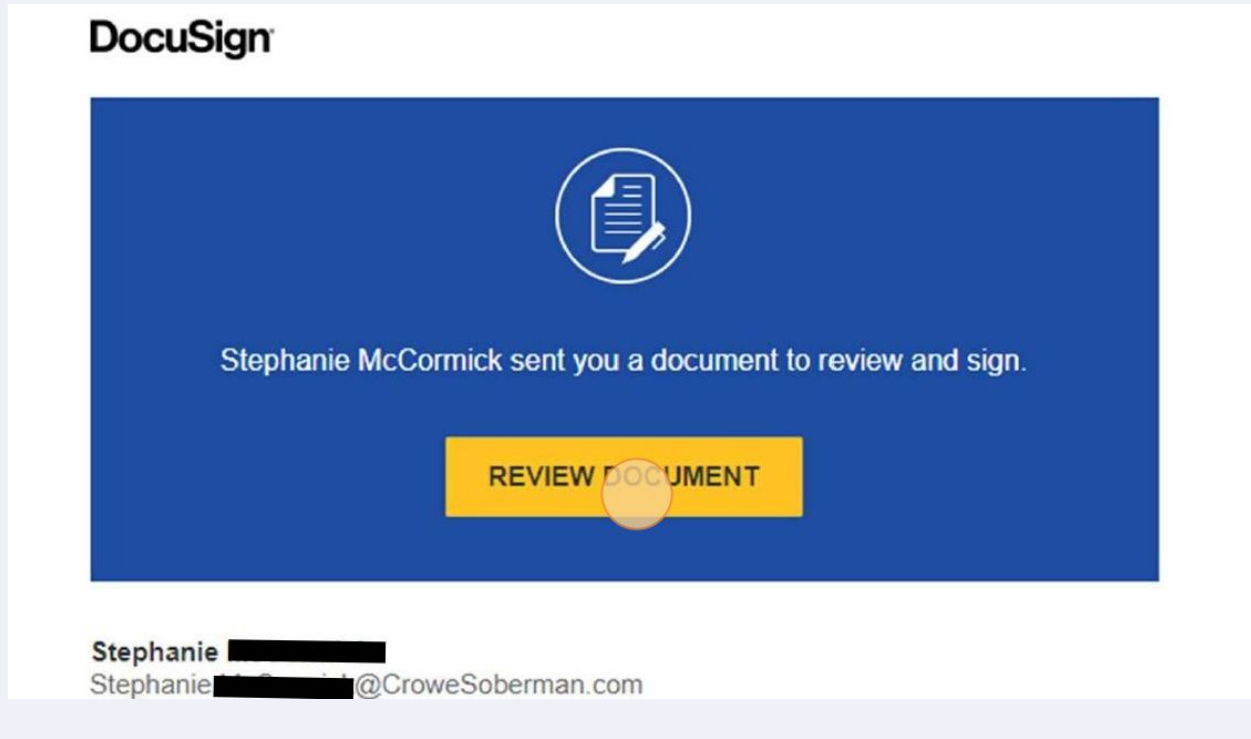


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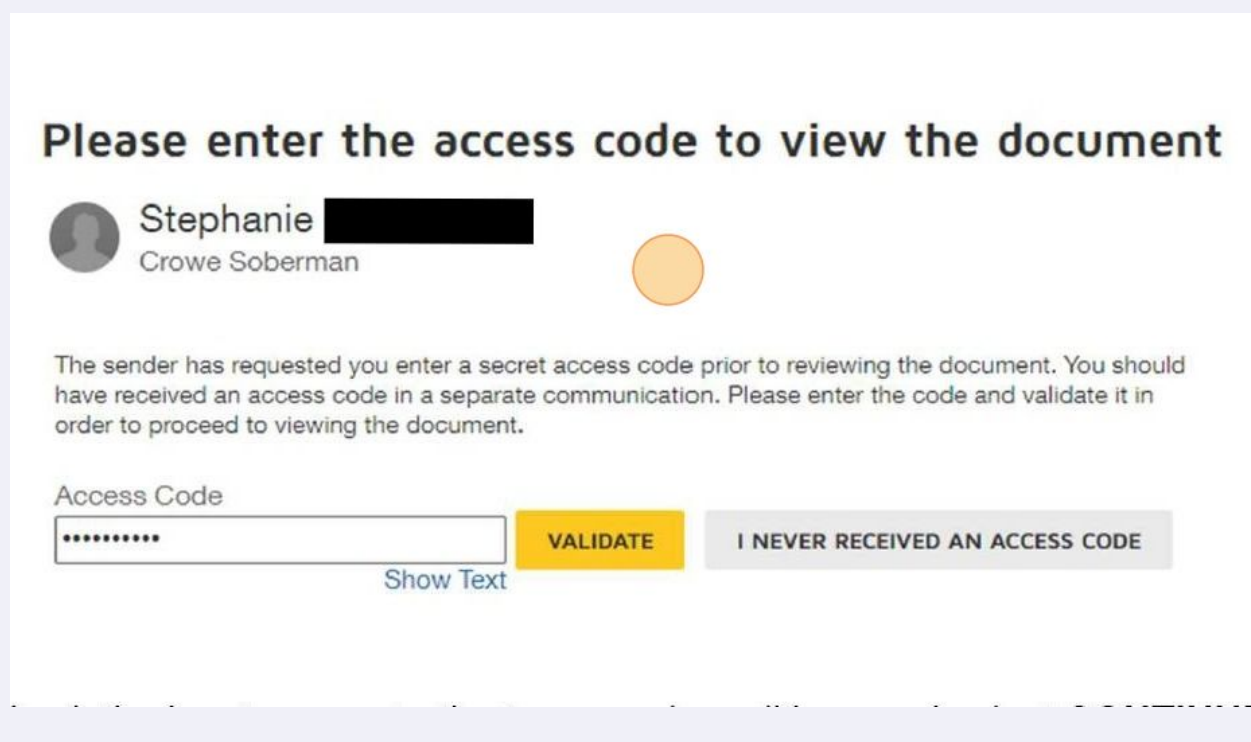
To review the history of interactions through your client portal, navigate to the History tab.



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



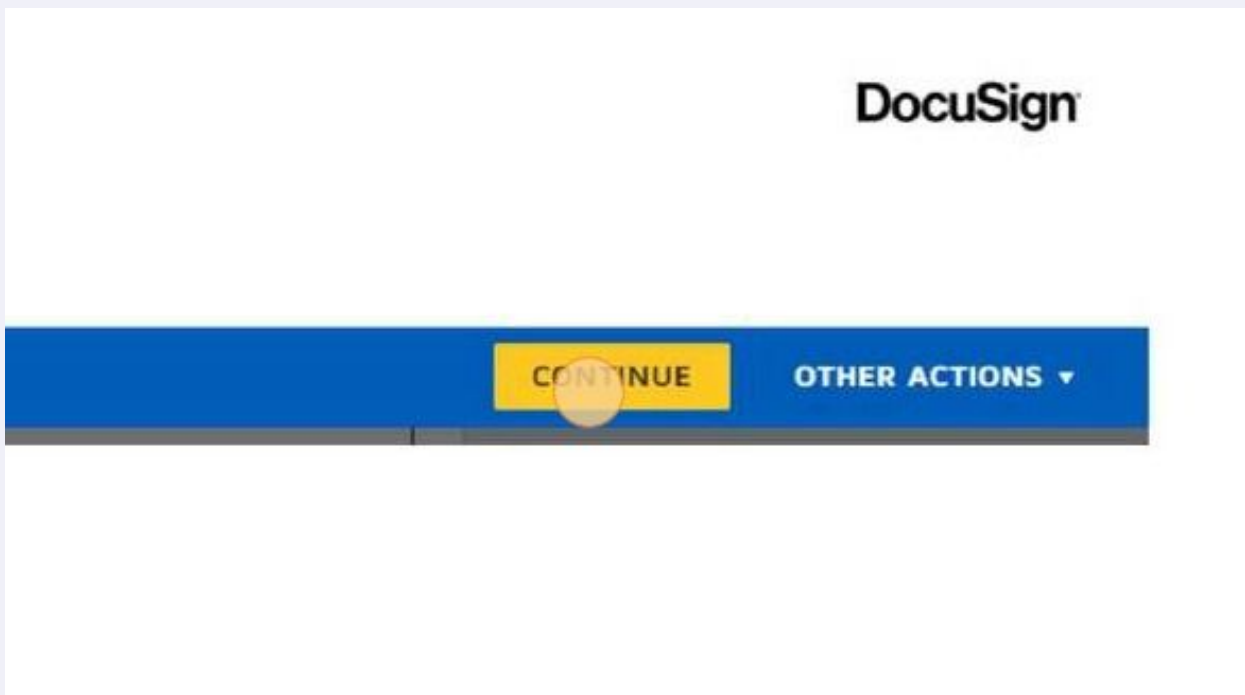
- 16 Enter the access code that is contained in the message from the sender of the document(s). The code will be in your portal in the Conversations tab. Click 'Validate'.



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.

