

Setting up your Client Portal for the First Time



- 1 You will receive an invitation via email from your contact at Crowe Soberman inviting you to use the client portal.



Note: If you have two different client portal accounts registered with two different email addresses, those email addresses are not interchangeable.

If you are having trouble signing into your account(s), you may be using the wrong email address with the wrong password.

- 2 Navigate to the email you have received and click on 'View Conversation'.

A screenshot of an email inbox. On the left, there is a contact icon with the letters "SM". The main area shows an email from "Stephanie [REDACTED]" with the subject "Amanda's Client Portal" and the message "contains 1 message". Below the message, there is a green button with the text "View Conversation" in white. A small orange circle is positioned to the right of the button. At the bottom of the email view, there is a note: "Copy and paste link to go directly to "Amanda's Client Portal": <https://crowesoberman.com>".

Stephanie [REDACTED] invited you to access "Amanda's Client Portal" on TitanFile, which contains 1 message.

View Conversation

Copy and paste link to go directly to "Amanda's Client Portal": <https://crowesoberman.com>.

3 Your email and name will automatically appear.

Register and get access to the following:

 2 Messages  2 People

To access this information, there is no installation or configuration required.
You only need to set a new password and you will have access.
Your password must be at least 8 characters long, and contain at least three of the following four characters: A lowercase character, an uppercase character, a special character, and a digit.

Your email:

Your name:

Password:

Confirm password:

Proceed to messages

4 Please set up a new password to access your client portal.

2 Messages 2 People

To access this information, there is no installation or configuration required.
You only need to set a new password and you will have access.
Your password must be at least 8 characters long, and contain at least three of the following four characters: A lowercase character, an uppercase character, a special character, and a digit.

Your email:

Your name:

Password:

Confirm password:

Proceed to messages

By logging in you accept the [Terms of Service](#).



Note: You will be required to change your password every 45 days. You will need to enter your current password to create a new password.

If you have forgotten your current password, navigate to this link:
<https://crowesoberman.titanfile.com/password/reset/>

5

Click on 'Proceed to Messages'.

The screenshot shows a login interface with the following elements:

- Header: "2 Messages" and "2 People".
- Text: "To access this information, there is no installation or configuration required. You only need to set a new password and you will have access. Your password must be at least 8 characters long, and contain at least three of the following four characters: A lowercase character, an uppercase character, a special character, and a digit."
- Form fields:
 - Your email: [REDACTED]@hotmail.com
 - Your name: Amanda [REDACTED]
 - Password: [REDACTED]
 - Confirm password: [REDACTED]
- Buttons:
 - A green button labeled "Proceed to messages" with a yellow circular icon to its right.
 - A small link below the button: "By logging in you accept the [Terms of Service](#)."

6

You now have access to your Crowe Soberman client portal.

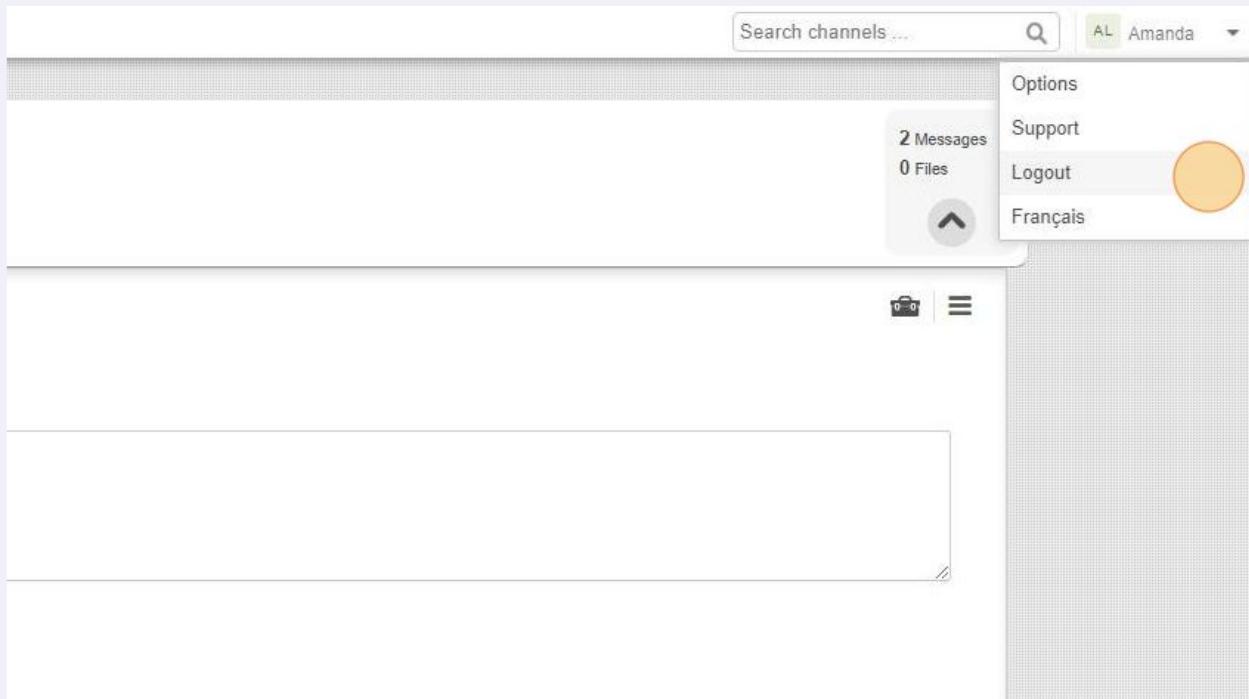
7

To Logout, click on your name in the top right corner.

A screenshot of a messaging application interface. At the top, there is a search bar with the placeholder text "Search channels..." and a magnifying glass icon. To the right of the search bar is a user profile icon for "AL Amanda" with a yellow notification bubble. Below the search bar, a large, empty white area represents the message list. In the top right corner of this area, there is a small white box containing the text "2 Messages" and "0 Files" above a circular arrow icon. At the bottom of the message list area, there is a small icon bar with a camera, a list icon, and a settings icon. The overall background is a light grey grid pattern.

8

Click 'Logout'.



To get back to your client portal, navigate to
<https://crowesoberman.titanfile.com/login/?next=/>