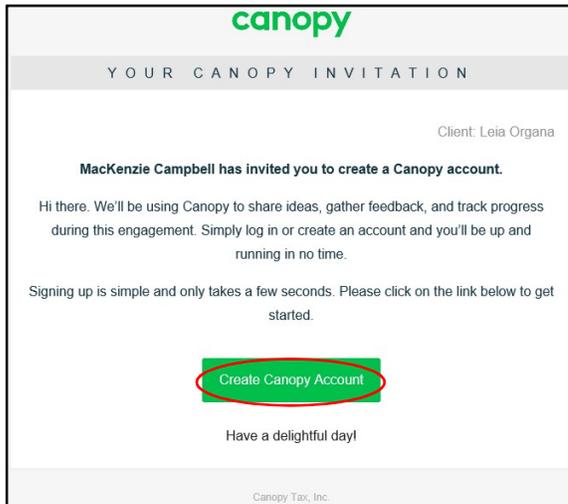


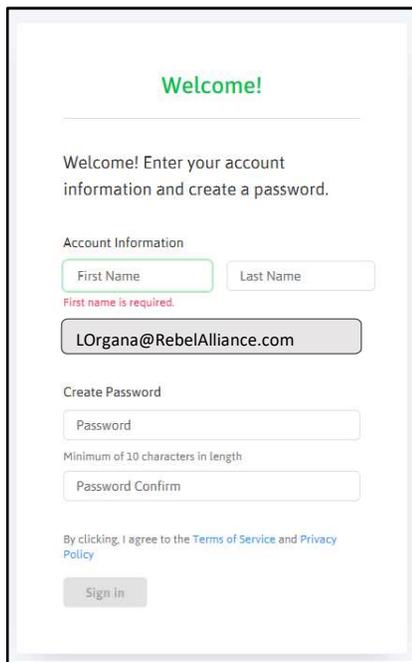


Canopy Portal Walkthrough

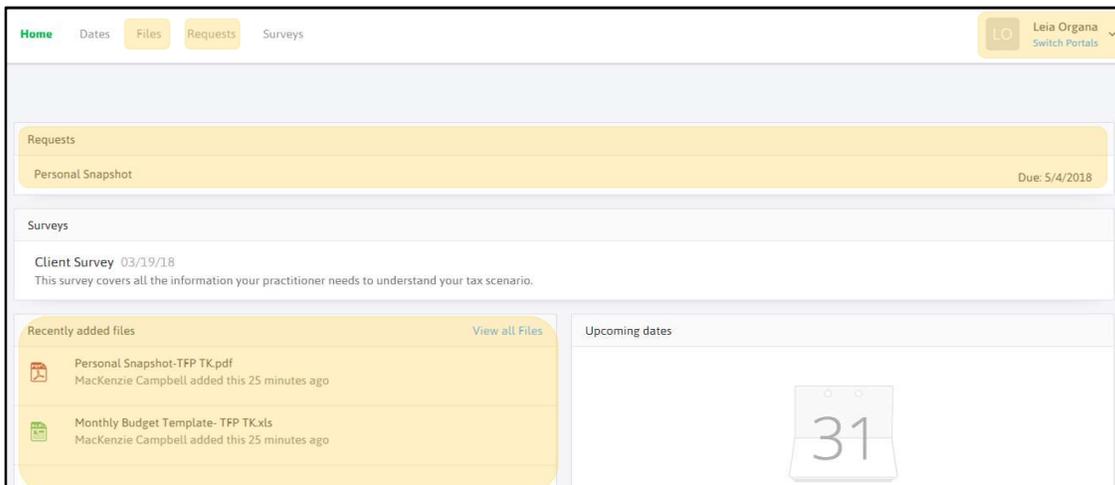
Creating your portal



When we invite you to Canopy you will receive an email like this prompting you to create your account. Please click the green button to create your account.



You'll be asked to input your first and last name and create your password.



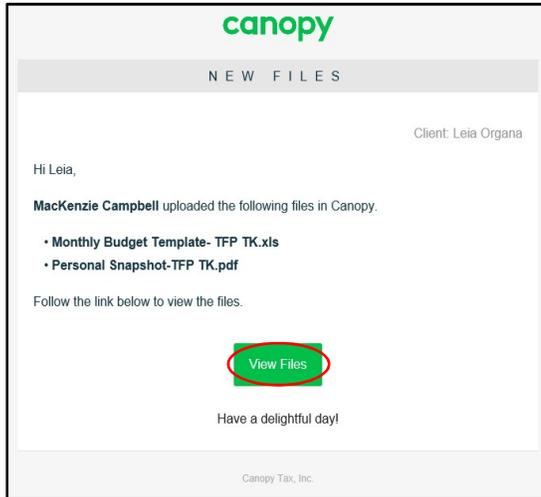
This is your homepage. On the next few pages we will cover the highlighted areas: Files, Requests, and My Account.

Use either the At-A-Glance boxes or the menu along to top to navigate to each section.

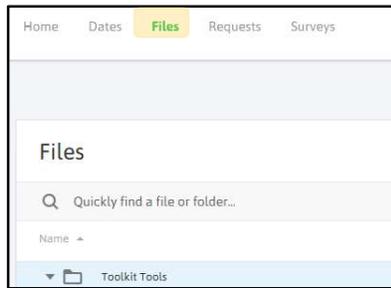
*We do not use the Dates section of Canopy

**Surveys are only used in representation cases and will not be covered here. Please call us if you're sent a survey and need assistance

Files



You'll receive an email like this anytime we upload files to your Canopy Portal. Click the green button to be taken to the files section of Canopy



You can also get to your files by selecting the File link in the menu as highlighted to the left

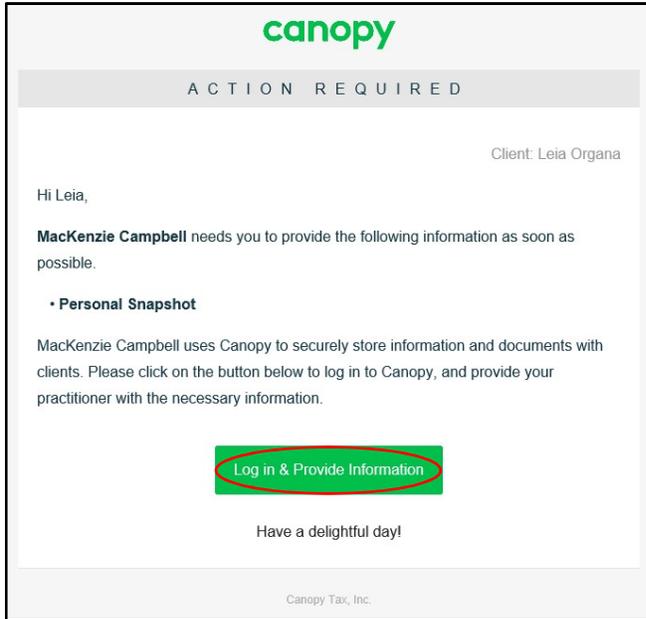


To upload documents, either drag and drop for your file system or select the upload button highlighted to the left then select your file.

Canopy is your personal tax filing cabinet as well as your Toolkit HQ. Please feel free to upload any tax documents as they come in.

You don't have the ability to create folders or organize the documents when you upload them, but we get a notification as soon as the upload is received. We will keep all your files orderly and create new folders as needed. If you'd like your files organized another way, please let us know and we'll change it

Requests



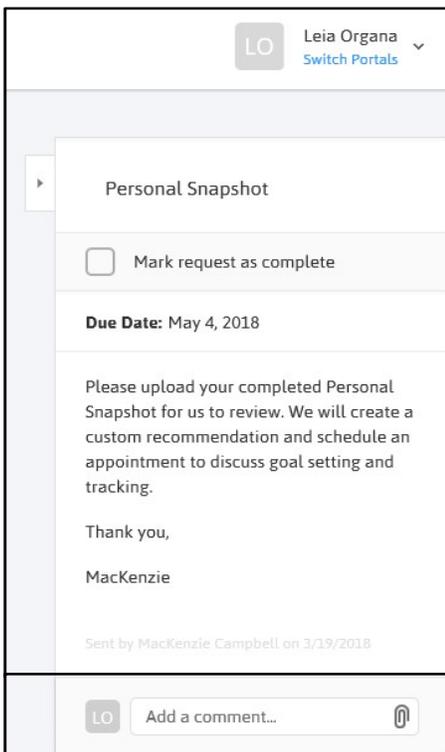
Sometimes we will ask you provide specific information via Requests. This is a quick and easy way to get info back and forth and works similarly to a chat program.

The email you receive will look like this and lists what we're looking for. Hit the green button to be taken straight to the request. Alternatively, you can log into Canopy and select Requests from the menu as highlighted in the next image.



All requests will be listed on the Request screen. Double click the request to respond and see the full message

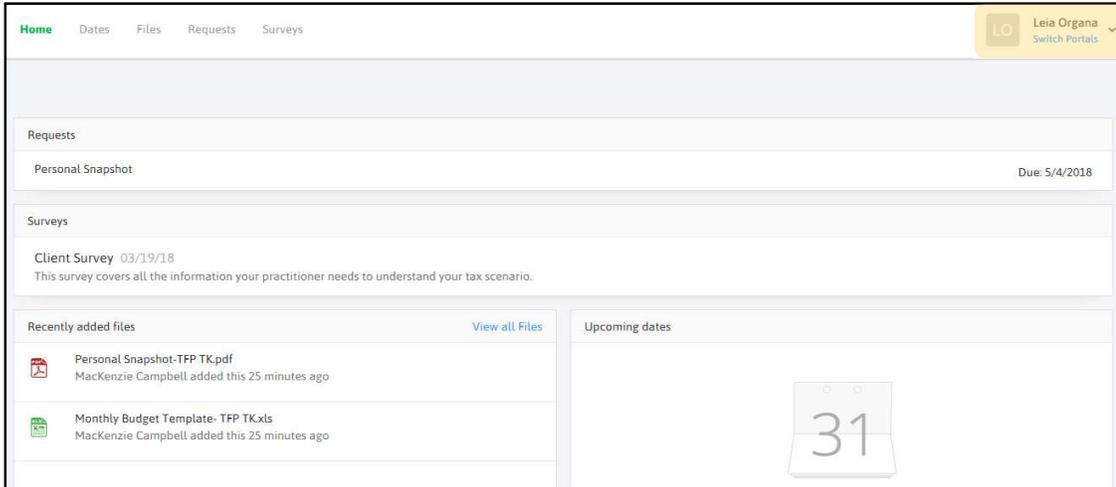
Use the drop-down menu to see completed requests.



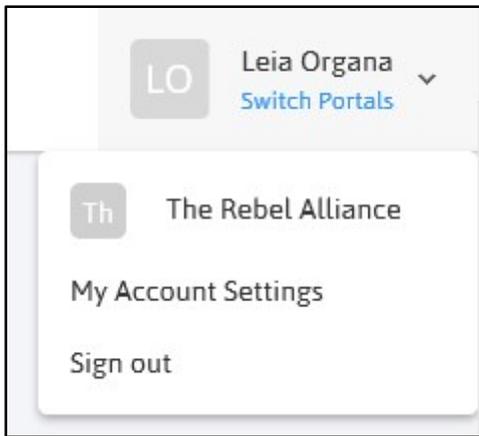
In each request will be our message as well as a comment box, attachment button and "Mark Complete" box. If the request is time sensitive a due date will be listed and you may get automated email reminders to complete the request. Marking a request complete will stop all email reminders for that specific request.

Please write us back in the comment box or select the paperclip icon to attach the requested document then mark the request complete at the top. We're notified immediately when you respond and will follow up if more info is needed

Account Settings/Management

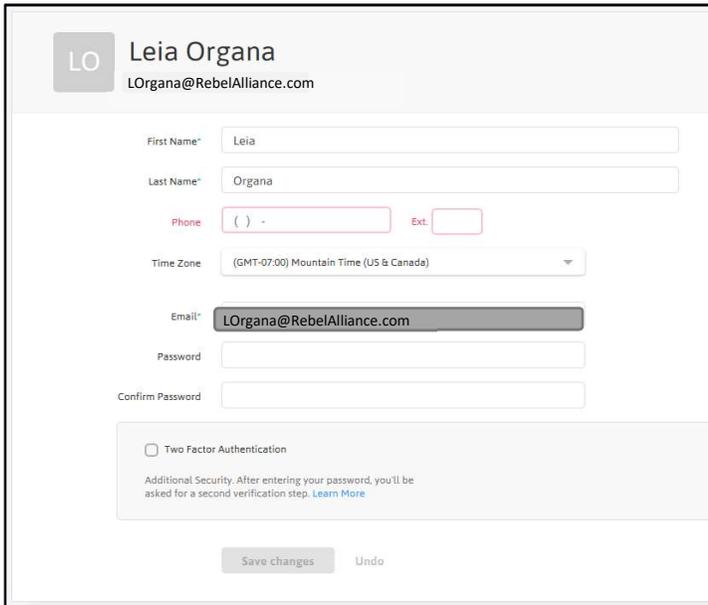


To manage your account and change portals select the drop down next to your name in the top right corner as highlighted in the image.



If you own a business or have access to another portal you can switch between the two in this menu (in this example, Leia also has access to The Rebel Alliance business portal to manage her Business Toolkit). Selecting the other profile will switch you to that Canopy portal and the associated files and requests.

You are also able to modify your account settings in this menu and log out



In your Account Settings you can update your phone number and password as well as turn on Two Factor Authentication.

Two Factor Authentication helps ensure you're the only one accessing your account. The first time you log in from a computer you will be asked to click a link that's been emailed to you before you can access your Canopy portal. Canopy will then remember your device for 30 days before asking you to verify your identity again.