

How to upload a document to your Client Portal

> UPLOAD TO A TASK

STEP 1

Navigate to 'Tasks' from the menu on the left of your portal

•	Dashboard	
D	Tasks	
0	Docs	
ß	Rooms	

STEP 2

Locate and click on the Task.

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Status	Tosk	Assignee	Due Date	Action	
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D Overdue	Upload doc	Simplified Classic	09/06/2024	N Edit	
D Overdue	Please complete the Detailed Financ	Simplified Classic	11/05/2024	Fill now	
O Completed	Upload Super statement	Simplified Classic	09/06/2024	🥒 Edit	

STEP 3

Drag and drop your file/s into the upload space provided or click 'Browse' to locate the file/s within your device.

STEP 4

Once the document/s have been saved to the Task, they appear as an attachment.

Click 'Mark as complete' to finalise the Task. This will cease all reminder notifications and notify us the Task is complete.

The documents attached to the Task can also be found in the 'Docs' area of your portal.

50 MB limit. Allowed types: .c. xlsx. zip.	w doc docx gif jpeg jpg pdf	.prig.ppt.xls
ID Docs.pdf		8
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> UPLOAD TO DOCS

STEP 1

Navigate to 'Docs' from the menu on the left of your portal.



STEP 2

Drag and drop your file/s into the upload space provided or click 'Browse' to locate the file/s within your device.

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The Portal supports the following common file formats: .csv, .doc, .docx, .gif, .jpeg, .jpg, .pdf, .png, .ppt, .xls, .xlsx, .zip

STEP 3

Once the file/s have been uploaded, a pop-up window will appear. Choose 'send' to notify Certe of the upload.

3 file(s) uploaded
0	Financial Services Guide.pdf
0	Letter of Engagement.pdf
0	Life Insurance policy - Copy.pdf
Do yo have t	want to send a notification to Jones Allen that these document(x) seen uploaded?

STEP 4

Move the file to a different folder if required.

Doshboard > Docs				
Jocs				
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We're here to help (02) 9132 5900 connect@certe.com.au