

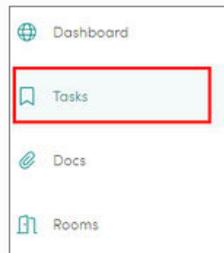


How to upload a document to your Client Portal

> UPLOAD TO A TASK

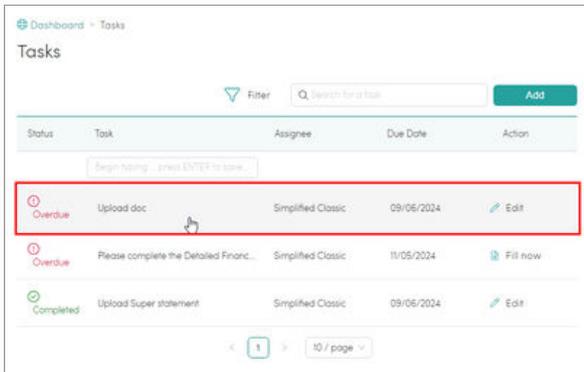
STEP 1

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



STEP 2

Locate and click on the Task.



STEP 3

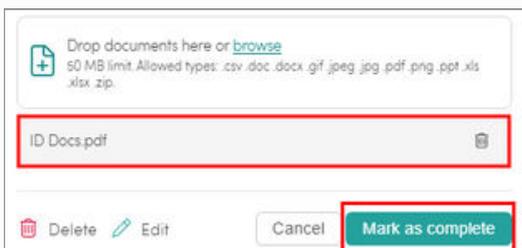
Drag and drop your file/s into the upload space provided or click 'Browse' to locate the file/s within your device.

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.

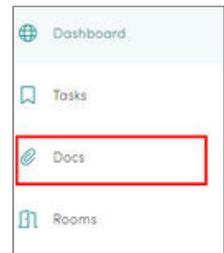
The documents attached to the Task can also be found in the 'Docs' area of your portal.



> UPLOAD TO DOCS

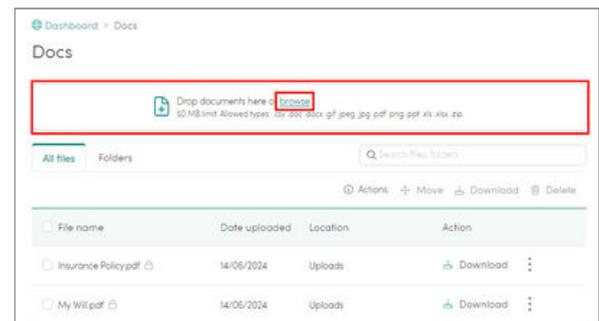
STEP 1

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



STEP 2

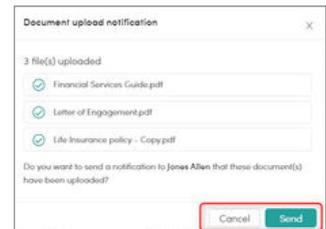
Drag and drop your file/s into the upload space provided or click 'Browse' to locate the file/s within your device.



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

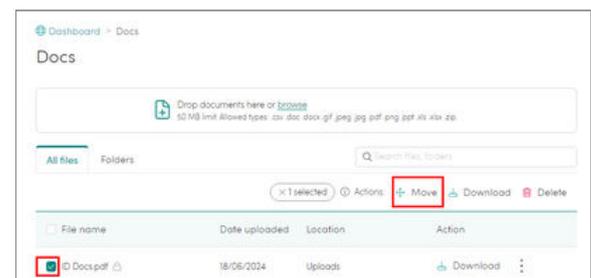
STEP 3

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



STEP 4

Move the file to a different folder if required.



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