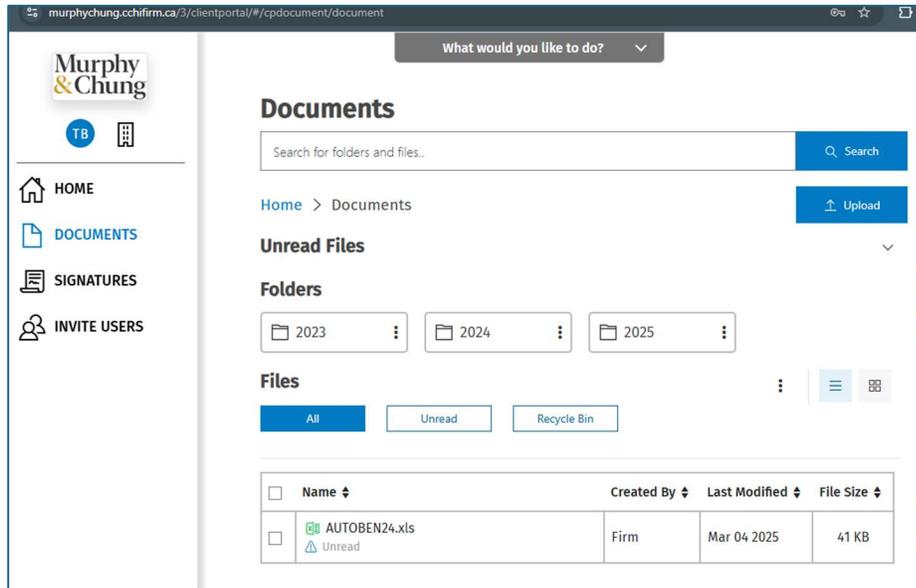


Frequently Asked Questions (FAQ) for the Client Portal

1. How do I access my Client Portal?

Follow this link to reach the log in page: <https://murphychung.cchifirm.ca/clientportal/>.

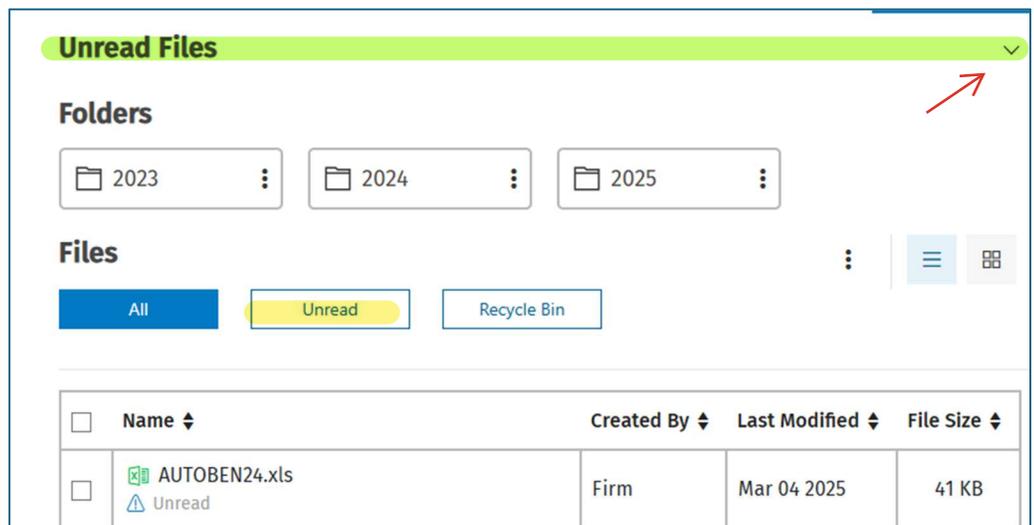


Log in using the email and password you created when you signed up. The homepage should look similar to the image to the left.

2. Where can I find unread documents?

Unread documents will appear on your dashboard. You can access them by:

- Selecting the "Unread" tab in the Files section on your dashboard.
- Clicking the arrow next to "Unread Files."



3. How do I sign documents that require my signature?

If we have uploaded documents requiring signatures, they will appear under the "Signatures" tab in the left-hand navigation pane.

4. How do I search for documents?

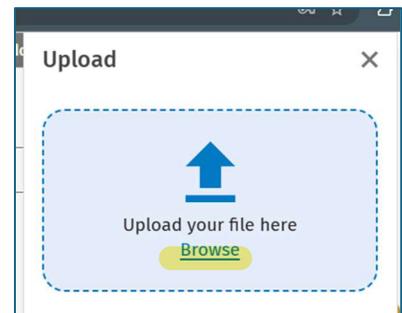
You can search for documents within folders using the search bar. To help you navigate, all documents uploaded by us will automatically be categorized into:

- Calendar year-end folders for individuals.
- Fiscal year-end folders for corporations.

5. How do I upload documents to my portal?

To upload documents:

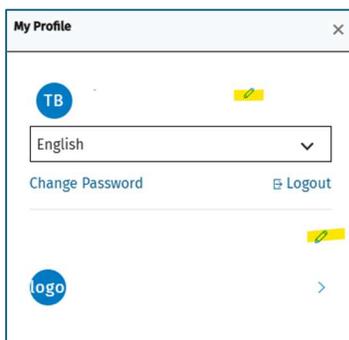
- Click the upload button.
- Drag & drop files into the designated area.
- Alternatively, select "Browse" and navigate through your computer's hard drive.



6. Can I invite other users to my portal?

Yes, you can invite others (e.g., spouse, bookkeeper, business partner) using the "Invite Users" tab on the left hand navigation bar.

7. How do I update my personal or business information?



Click on your initials or your business's initials in the top left corner of the browser, above the navigation pane.

- In the tab that appears, click on the pencil icons next to your name. The top pencil allows you to update multi-factor authentication settings.
- The lower pencil enables you to update your address and contact details.

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8. How do I switch between multiple portals (e.g., personal and business)?

If you have access to multiple portals, you can switch between them by selecting **the dropdown menu** at the top right of your browser. A list of portals will appear, allowing you to toggle between them.

9. Who do I contact for further assistance? For any questions or technical issues, reach out to our administrative team:

- **Email:** admin@murphychung.ca
- **Phone:** 416-298-8868 ext. 100 (Reception)

We're happy to help!

