



Uploading Documents to Your Client Portal

1. **Log in to your portal** using your usual login details. Please note that we do **not** hold copies of client passwords. If you have forgotten your password, you can reset it from the login screen using the **'Forgotten password'** option.
2. After logging in, you will be taken to the **Home Page** of your portal. From here, **hover over the tab labelled 'Document Portal'** (as shown in the image above).
3. If you have a **limited company** and complete a **Self-Assessment Tax Return**, you will see **two folders** (as shown in the image):
 - One for your **company**
 - One for your **personal** documents If you are a **sole trader** or only complete a **Self-Assessment Tax Return**, you will see **one folder**.
4. Select the correct folder depending on the type of document you are uploading:
 - Choose the **company folder** for documents relating to your limited company.
 - Choose the **personal folder** for anything relating to you individually.
5. You can upload documents in two ways:
 - **Drag and drop** files directly into the upload area, or
 - **Select files** from your computer using the upload button (as shown in the image on the next page).

Cont'd...

portal-a-butler.co.uk/document-portal/1

A Butler & Co
CHARTERED CERTIFIED ACCOUNTANTS

My Info Document Portal To be Completed Deadlines Tax Liabilities Settings

Joseph Bloggs

View All Documents View Signed LoEs New Folder

Upload

Drag and drop a file here or click

Upload Document

Date Uploaded	Document	E-Sign	File Type	File Size
08/09/2022 12:38	Test Document		PDF	89kB
08/09/2022 12:32	Test Document		PDF	89kB
08/09/2022 12:24	Test Document	Joseph Bloggs Signed 08/09/2022	PDF	89kB

Uploading Your Documents

6. **Drag any documents** you wish to upload into the **'Upload Box'** on the right-hand side of the screen.
7. Once the documents appear in the upload area, click **'Upload Document'**.
8. After the upload is complete, click **'Save & View Documents'**.
9. You will then be able to see:
 - The documents you have uploaded, and
 - Any documents uploaded by A Butler & Co

If you have any further troubles accessing your portal or completing the checklist, please contact the office either by email, admin@a-butler.co.uk or via phone, 01332 346241.