

Innovo Portal – Client User Guide

December 1, 2016

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1. Introduction

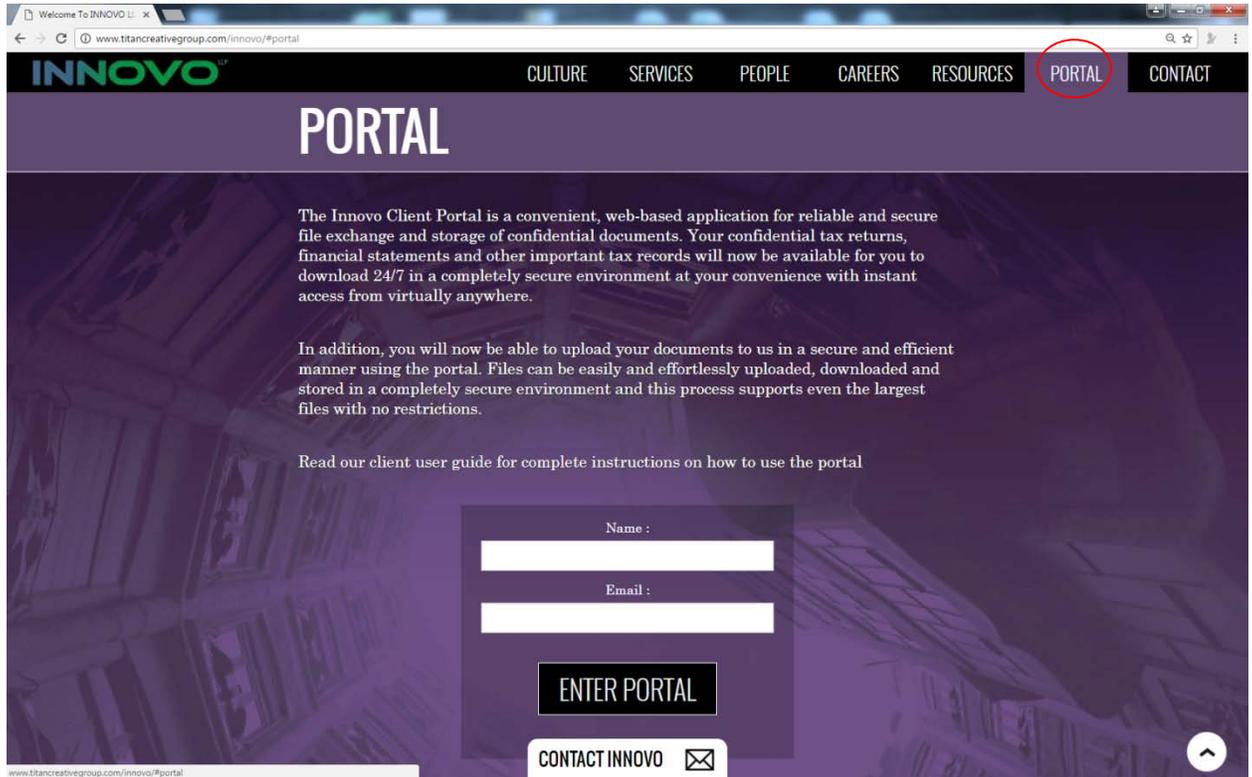
The INNOVO Client Portal is a convenient, web-based application for reliable and secure file exchange and storage of confidential documents. Your confidential tax returns, financial statements and other important tax records will now be available for you to download 24/7 in a completely secure environment at your convenience with instant access from virtually anywhere. In addition you will now be able to upload your documents to us in a secure and efficient manner using the INNOVO portal. Files can be easily and effortlessly uploaded, downloaded and stored in a completely secure environment and this process supports even the largest files with no restrictions.

With the growing international trend toward increased security for electronic document transfer, the use of unencrypted email for exchange of confidential documents is becoming unacceptable. Now is the time to maximize the security of sensitive information, and start sharing, storing and organizing documents the intelligent way using the INNOVO Client Portal. With the INNOVO Client Portal you can:

- Access current and historical documents immediately from any location with Internet access via a secure, private repository.
- Organize documents electronically in simple folders, one folder per tax year
- Easily upload documents of all sizes without relying on an FTP server
- Allow multiple users access to your portal
- Create additional private folders for use by designated individuals only (this will likely be of interest to our larger corporate clients)
- One user id can have access to multiple portals (useful in the case of families with several members)
- Eliminate the use of email to exchange confidential information with us

2. How to access the INNOVO Client Portal

→ The portal can be accessed through our website by clicking on the Portal icon at the top right-hand corner



Alternatively you can access the Portal directly at: <https://portal.innovollp.ca/portal>

3. How to log in to the INNOVO client portal

- Your login credentials are contained in a secure PDF that will be sent to you via Email by the Portal Manager. In order to open the secure PDF you will need to call the INNOVO office at (905) 849-0990 and request the password to open your Portal credentials PDF.
- The open PDF will resemble the following:

Client: 0 Bugs Bunny

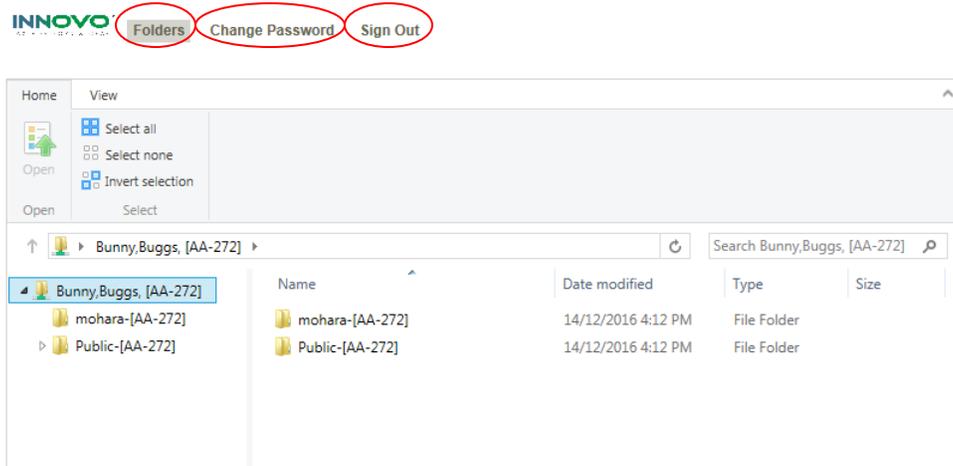
Date Issued: 2015-10-29

User Logon	Initial Password	User Folder
ohara.ptf@gmail.com	6YQHqyGab1	ohara.ptf-[AA-1504]

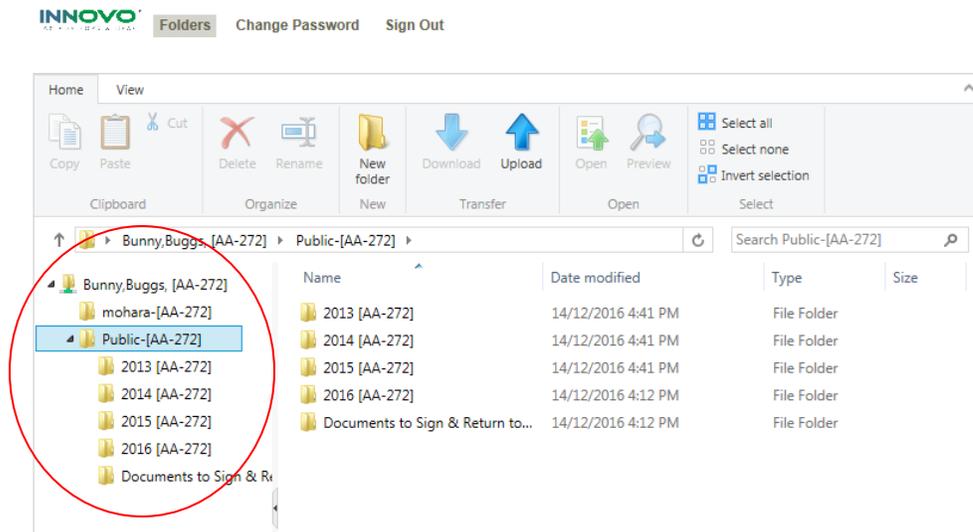
- Once you have your login credentials you may login to your Portal
- Click on the Portal icon from the INNOVO website, or enter the following URL into your web-browser: <https://portal.innovollp.ca/>
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- The login screen is as follows:

- Enter the user login id and password as provided in the secure PDF

- Upon logging into the portal there are 3 options at the top of your screen:
- Folders – view the documents in your portal folders
 - Change Password – you have the option to substitute the system-generated password to a different password of your choosing
 - Sign Out

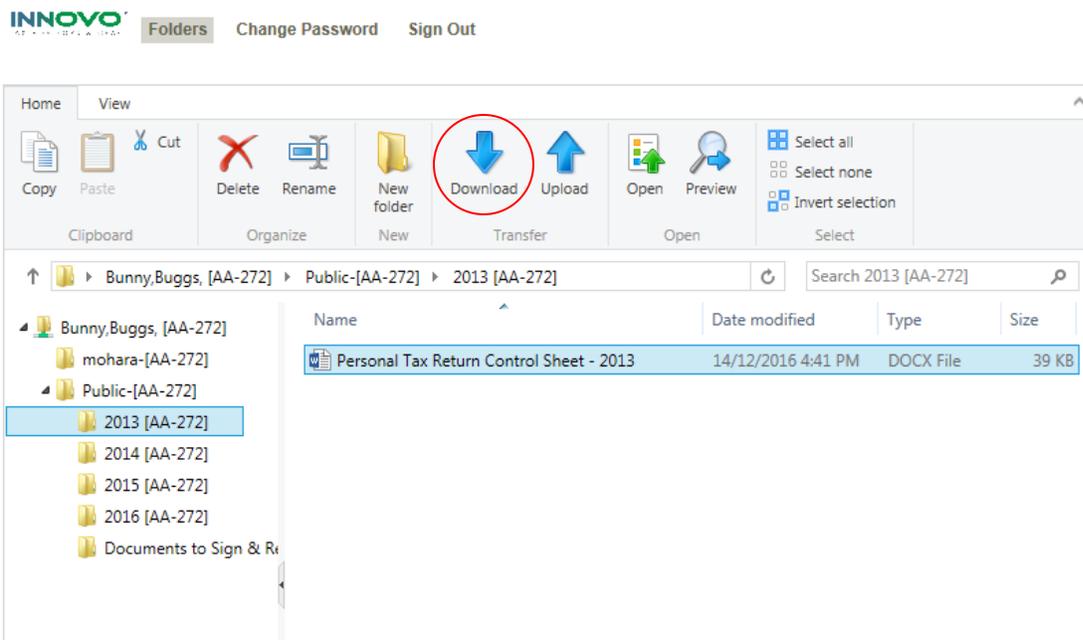


- The Folders are listed by year and include your final tax documents as prepared by us
- Some larger portals that have multiple users may have additional private folders for each individual user.



4. How to retrieve information from your Portal

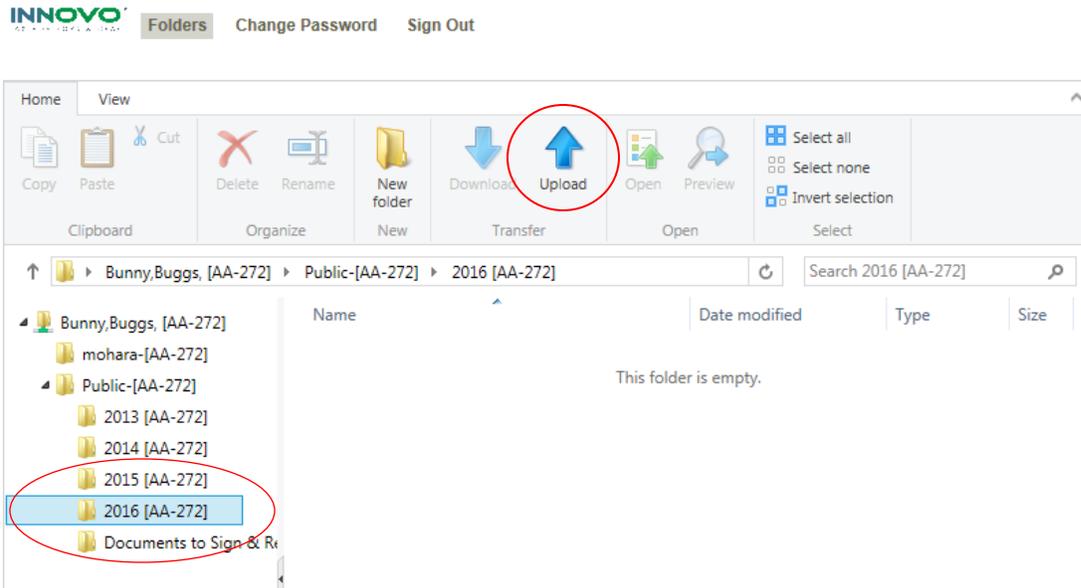
- Login to your Portal
- Select a folder from which the file will be downloaded
- Click the Download Files icon



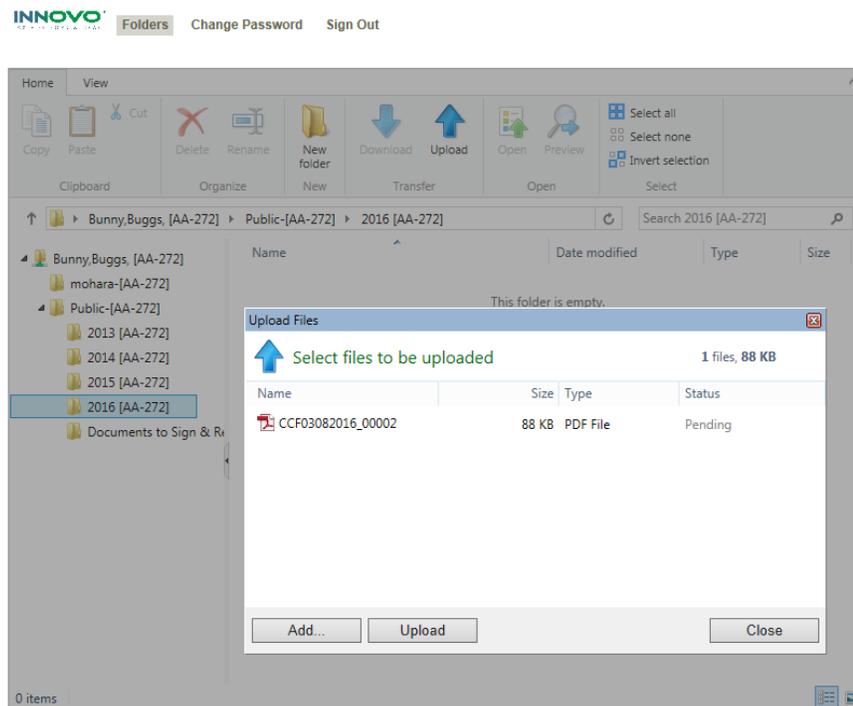
- A File Download window will open.
- Click Save to save the file to your PC
- A Save As window will open.
- Browse to the folder where the downloaded file is to be saved, and click the Save button
- A progress bar will appear to indicate the status of the file transfer.

5. How to send us information

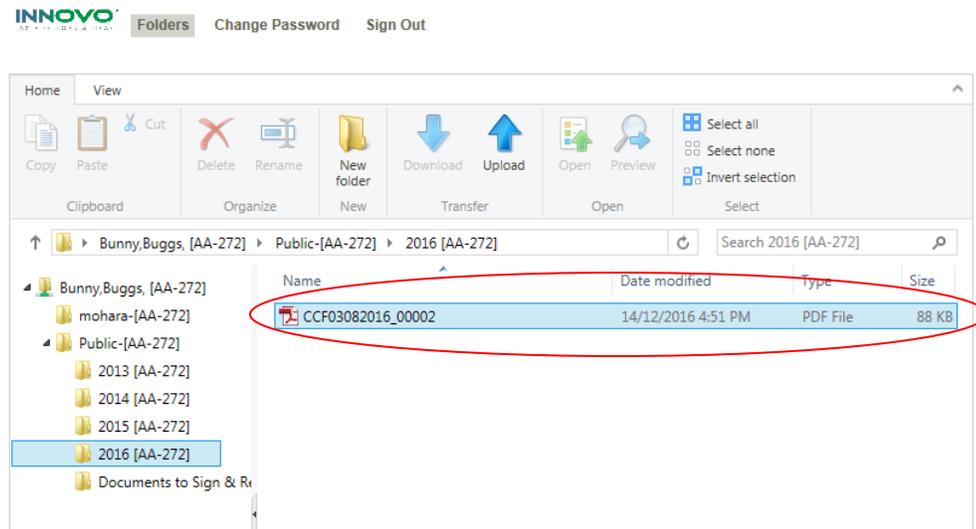
- Login to your Portal
- Select a folder into which your information will be uploaded
- Click the Upload Files icon



- An Upload Files window will open.
- Click Add



- A Select file(s) to upload window will open. Browse to and select the files to be uploaded, then click the Add button
- The selected files will be added to the Upload Files window.
- Click Upload
- A progress bar will appear to indicate the status of the file transfer.
- When complete, the uploaded file will appear in the folder



- The INNOVO Portal Manager is automatically notified each time you upload information to your Portal