

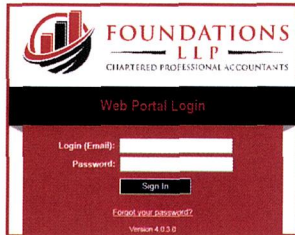
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Client Portal Instructions  
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1. Complete & return the Client Data Exchange Agreement.
2. The client will receive an email from Portal Manager.
  - a. The email will have a password protected attachment; you will receive instructions to access this attachment.
  - b. The attachment will include the user names & temporary password for all users.
  - c. This document will also be attached.
3. Go to our Website – <http://portal.foundationsllp.com:8080> and login



4. When the portal opens, you will see the following:
  - a. On the top, you will see an option to change your password.
  - b. On the left side, all portals you have access to will be listed.
  - c. When you select a portal on the left, you will see the available folders on the right for that portal.
  - d. There may be sub folders under each folder, double click on a folder to open a folder.
  - e. A folder with a green circle and a check mark image indicates that there are files under this folder.
  - f. The folder with your name is a private folder. You are the only member of your organization who has access to this folder. Foundations LLP employees have access to all folders.
  - g. The Public folder is available to all users that have access to the portal.
5. Upload files – transfer a file from your computer to the web portal for Foundation LLP use.
  - a. Select the folder location on the left side where you would like to place the file
  - b. Select  (near the top center), this is the Upload file tool.
  - c. Select “add” and navigate to the file you would like to upload, click Open.
  - d. When you have selected all the files you would like to upload, click the upload.
6. Download files – transfer a file from the web portal to your computer.
  - a. Navigate to the folder that contains the file and click on the file in the right section of the portal.
  - b. Select  (near the top center), this is the Download tool.
  - c. Select Save File, click ok.
  - d. Navigate to the folder where you would like to save the file, click save.
  - e. If you would like to remove the file from the portal after downloading, right click on the file and select Delete.
7. You can create new folders by selecting the folder where you would like to place the new folder and select  (near the top center), this is the Create New Folder tool.
8. Please note that many of the above functions can be performed by using a right mouse click.

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\* Denotes  
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