

I wanted to just provide a refresher on the portal system. Some of you have access to multiple items. This is just a quick navigation overview. You can access everything (even signatures) from the documents section. These screen shots are from the Documents side (if you have tasks, you only need to click on that, and the underline will move, and you will be in the tasks section)

The image displays three sequential screenshots of the Seale Financial portal interface, specifically the 'DOCUMENTS' section for 'Client: Savant Systems Inc'. Each screenshot shows a top navigation bar with 'TASKS' and 'DOCUMENTS' tabs, and a user profile 'JAIME SEALE'. The main content area includes a 'FOLDER VIEW' button, a search bar, and a table of documents. The first screenshot shows a 'Business or personal?' popup. The second screenshot shows a 'Choose your view' popup. The third screenshot shows an 'Everything in one place' popup.

Business or personal?
Quickly access your business and personal accounts.
1 of 4
Next

Choose your view
Switch between a sortable view of your documents or view the folders your accountant has created for you.
2 of 4
Next

Everything in one place
Securely upload your documents, or use the Client Center mobile app to scan and upload them.
3 of 4
Next

Associated Task	Added By	Modified
Business Document checklist.pdf	Someone Else	1/12/2024, 4:17 PM

You can easily change between folders for your personal, business, or trusts documents:

Viewing Client Center As: Jaime Seale

REPORT AN ISSUE

CLOSE

TASKS

DOCUMENTS

JAIME SEALE

Client: Savant Systems Inc

Search

Add

Download

Delete

Send

Search

Time

Name

Associated Task

Added By

Modified

Savant Systems Inc

Seale, Drew and Jaime

Seale Financial Services Inc

2023 Business Document checklist.pdf

Someone Else

1/12/2024, 4:17 PM

Choose the correct client folder.

Please navigate to the Source Documents folder. This is where you should save your required documents for your tax return.

Viewing Client Center As: Jaime Seale

REPORT AN ISSUE

CLOSE

TASKS

DOCUMENTS

JAIME SEALE

Client: Seale, Drew and Jaime

FOLDER VIEW

LIST VIEW

Client Documents

Source Documents

Add

Download

Delete

Send

Search

All Time

Name

Associated Task

Added By

Modified

2023 Seale property tax pmt.pdf

Someone Else

1/17/2024, 12:38 PM

Client Document Checklist.pdf

Someone Else

1/11/2024, 9:55 AM

Here I have changed to my business and navigated to source documents.

Viewing Client Center As: Jaime Seale

REPORT AN ISSUE

CLOSE

TASKS

DOCUMENTS

JAIME SEALE

Client: Savant Systems Inc

FOLDER VIEW

LIST VIEW

Source Documents

Add

Download

Delete

Send

Search

All Time

Name

Associated Task

Added By

Modified

2023 Business Document checklist.pdf

Someone Else

1/12/2024, 4:17 PM

If you do not see this folder, please let us know. We can either add it if it is missing or correct the sharing on the folder.

All engagement letters are in your 'Client Documents' folder. If you do not have one there, please let us know so we can add it.