

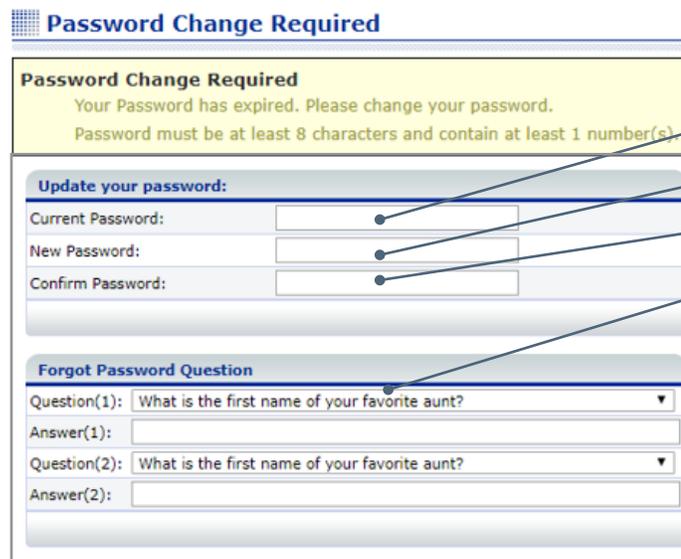
A full PORTAL tour

Welcome to the NEW Davis Martindale Portal. Thank you for working with us to make the sharing of documents secure, quick and easy!

Please do not hesitate to contact us if you need any help or have any questions at 519-673-3141 or portal@davismartindale.com.

STEP 1: Change Your Password

You will be prompted to change your password upon entering the portal for the first time. Your current username and password can be found within the email that we sent to you notifying you that your portal account was ready.



Password Change Required

Your Password has expired. Please change your password.
Password must be at least 8 characters and contain at least 1 number(s).

Update your password:

Current Password:

New Password:

Confirm Password:

Forgot Password Question

Question(1):

Answer(1):

Question(2):

Answer(2):

- Enter your current password
- Enter a new password that you have chosen
- Enter the new password again
- Choose two 'Forgot Password Questions' from the drop down menus and answer the question you have chosen. *Please choose questions that you will remember, as this will be used to reset your password if it's forgotten in the future.*

STEP 2: Read and accept the terms and conditions

Davis Martindale

Powered By **iCHANNEL**
By Concur

Terms and Conditions

This Client Portal Agreement ("Agreement") is made by and between this website operator("Firm") and you ("Client") effective on the date it is executed by Firm's authorized representative upon the following terms and conditions:

- 1. Purpose.**
Firm provides a Client Portal to permit easy and secure electronic transfer of documents between Client and the Firm and Client access to certain documents created or maintained by the Firm.
- 2. Service Availability.**
Firm will use its best efforts to provide 24 hour daily availability of the Client Portal Service. However, Firm makes no representation or warranty that 24 hour service will be available.
- 3. Security.**
Firm will use its best efforts to make the Client Portal secure from unauthorized access. The Client Portal will require industry standard 128bit encryption on all communications between the Client's end user device and the Client Portal server. The Client Portal server operating system and applications software will be updated and virus-scanned regularly. However, Client recognizes that no completely secure system for electronic data transfer has yet been devised. FIRM MAKES NO WARRANTY, EXPRESS OR IMPLIED, REGARDING THE EFFICACY OF THE SECURITY OF THE CLIENT PORTAL AND SHALL NEVER BE LIABLE

I agree to the terms and conditions

• If you wish to keep a copy of these terms and conditions, please click 'Print' before you accept and you can either print to hardcopy or to PDF for your future reference.

• By ticking the 'I agree to the terms and conditions' box and clicking 'Agree', you accept the terms and conditions.

STEP 3: Upload Your Documents to the Portal

• If you are linked to multiple companies, you can click on the 'Selected Entities' option to choose any of your other entities.

1 of 2

• Click on the 'Submitted to Davis Martindale' tab at the top.

• 'Drag and drop' files into the 'Upload' box by left clicking and holding over your file on your computer and dragging and then dropping it (by unclicking) into the Upload box within the portal.

UPLOAD

Drag documents here to upload or

• If you do not want to drag and drop, you can use the 'Browse' button to search for the file on your computer. Select the file and click 'Open'. You can also upload multiple documents this way.

STEP 3 continued

- Once you've selected your documents, you will then be shown steps for uploading your documents to the portal, starting with the 'Upload To' section. From here, you can select which company you would like to upload the documents to.
- **Folder:** You have the option of using the Default folder or creating additional folders to organize your documents.
- **Notifications and Notes:** Designated employees are notified when you upload documents and any notes. You can also add additional Davis Martindale employees.
- Click the 'Upload Files' button when ready.

Upload To: Sample Client - Lana (11) ▾

Select Upload Destination:

- Folder: Default ▾

Notifications and Notes (Optional)

Designated employees are notified when you upload files including any notes. If you would like to notify specific employees, enter their email addresses below.

✉ Enter email addresses separated by a comma (,)

Notes:

Upload files Cancel

- You will receive a confirmation notification when your documents have been added.

Selected Entities 1 of 2

My Profile Logout

✓ Files have been added. ✕

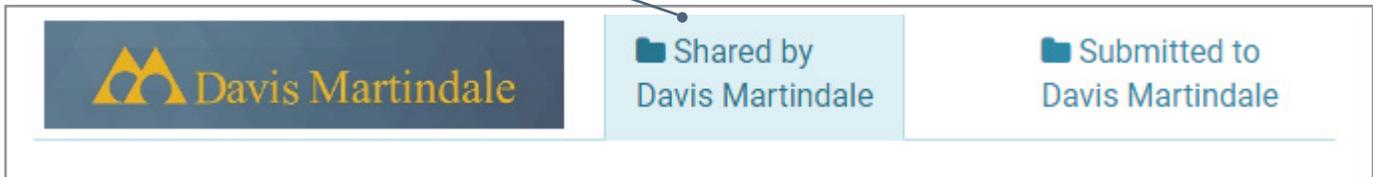
Files are being added.... ✕

ments here to upload or

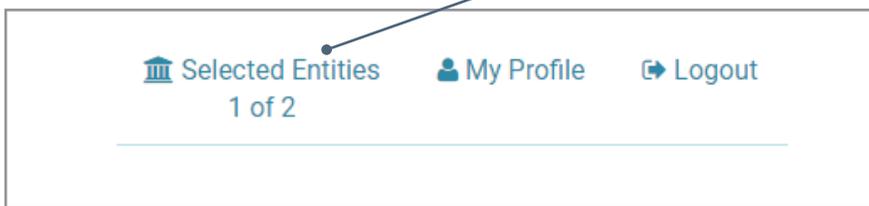
Browse 📁

STEP 4: Download Your Documents from the Portal

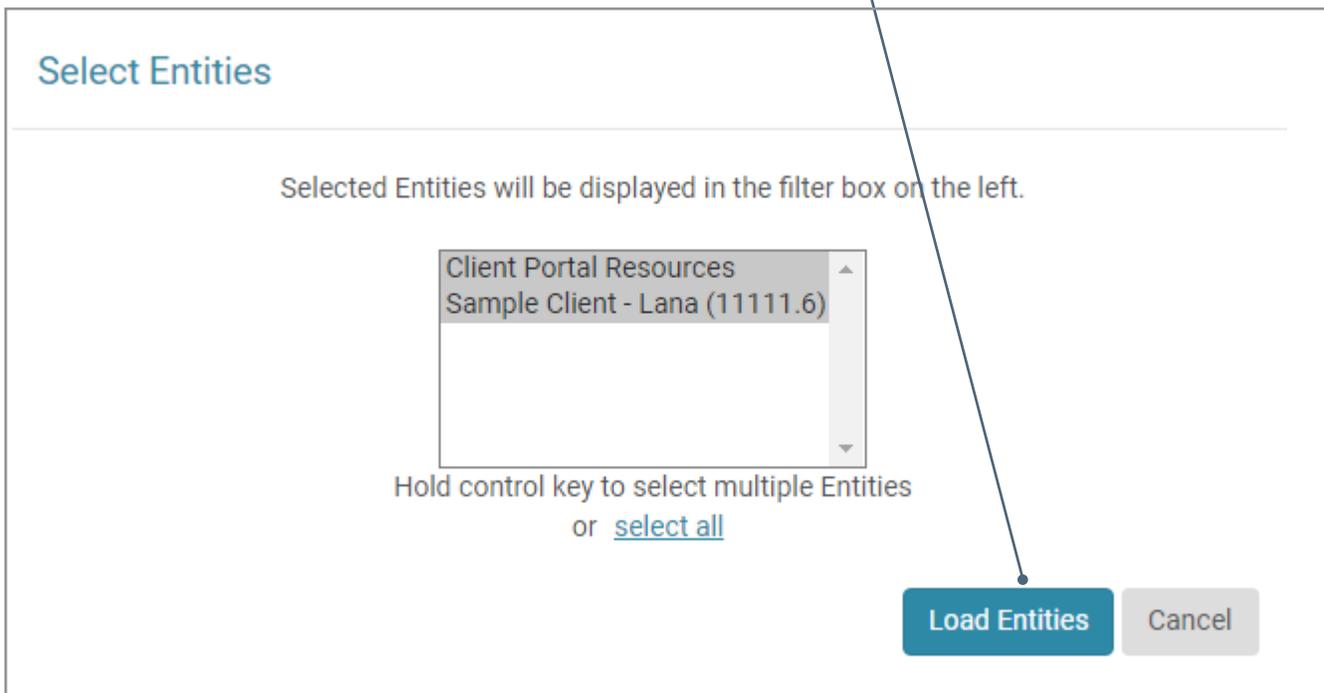
- You will receive an email from Davis Martindale if there are documents ready for you to view within your portal account. However, you may also login at any time to view your portal. Login using your username and password.
- Once logged in, Click on the 'Shared by Davis Martindale' tab at the top.



- You can switch between different companies or show all documents from all of your companies, click on the 'Selected Entities' option at the top of the page.

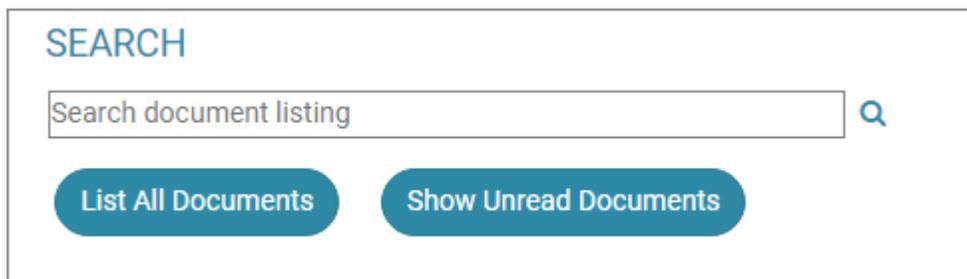


- Select the appropriate company or companies and click the 'Load Entities' button.



STEP 4 continued

- You can search for and within your documents, list all documents or only show unread documents.

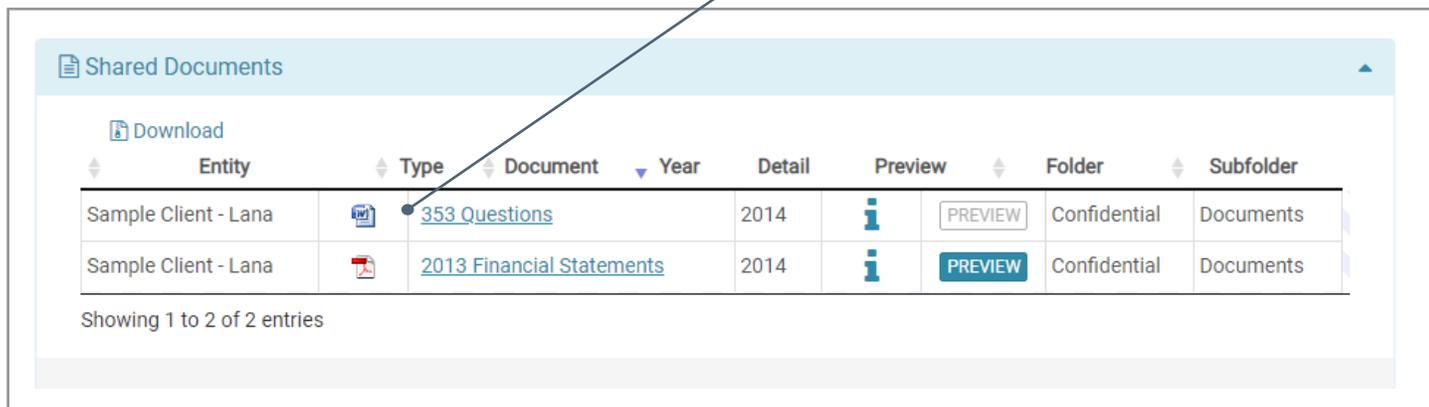


SEARCH

Search document listing

List All Documents Show Unread Documents

- The 'Shared Documents' section will show you the documents for the Selected Company. In this example, the company name is 'Sample Client - Lana'.
- To download documents, click on the document from the list.



Shared Documents

Download

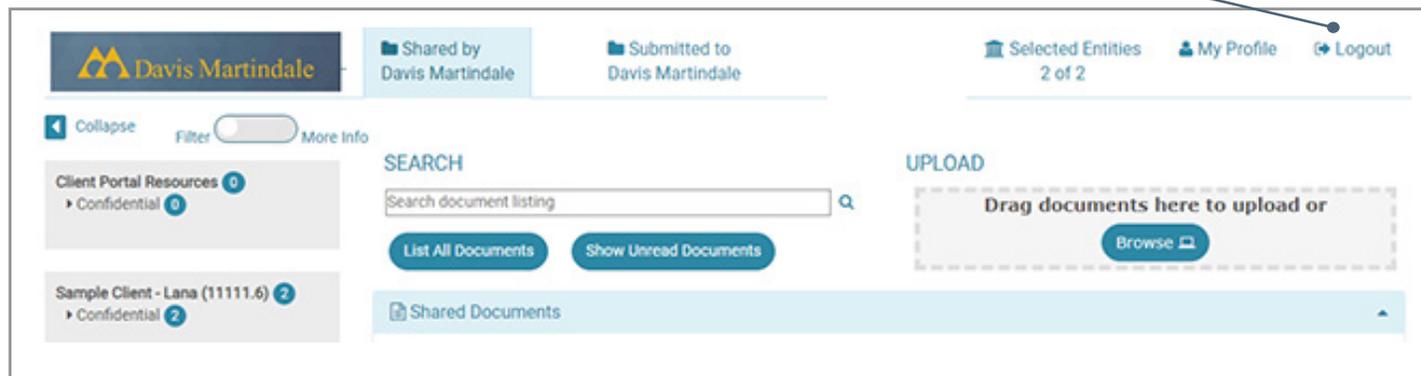
Entity	Type	Document	Year	Detail	Preview	Folder	Subfolder
Sample Client - Lana		353 Questions	2014		PREVIEW	Confidential	Documents
Sample Client - Lana		2013 Financial Statements	2014		PREVIEW	Confidential	Documents

Showing 1 to 2 of 2 entries

- Depending on what internet browser you are using, you will be able to open or save your document.

STEP 5: Please Log Out

- It is very important to log out when you are finished to ensure your portal remains secure.



Davis Martindale

Shared by Davis Martindale Submitted to Davis Martindale

Selected Entities 2 of 2 My Profile Logout

Collapse Filter More info

Client Portal Resources 0
Confidential 0

Sample Client - Lana (11111.6) 2
Confidential 2

SEARCH

Search document listing

List All Documents Show Unread Documents

UPLOAD

Drag documents here to upload or

Browse

Shared Documents

***Documents will be accessible on the portal for one year.**