

CLIENT PORTAL

Step-by-step Guide

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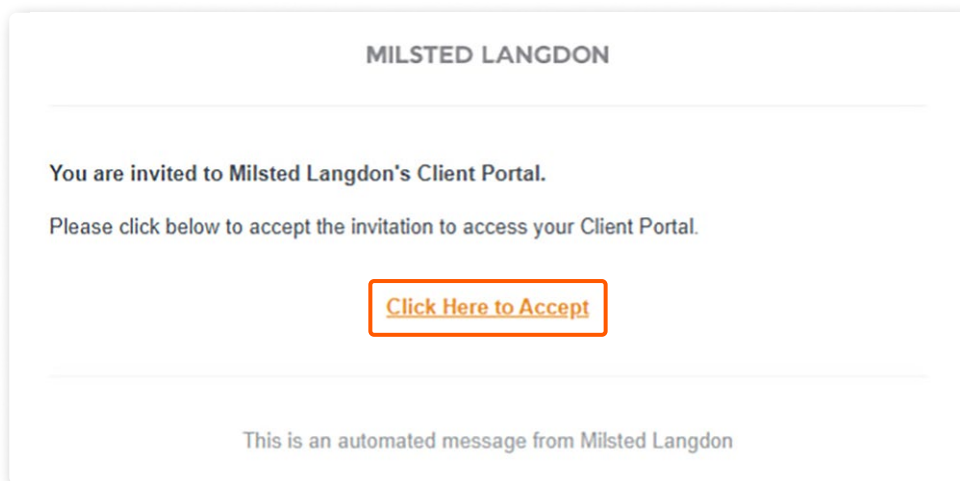
1. CREATING A PORTAL LOGIN

You will be sent an email by clientportal@milstedlangdon.co.uk with a portal invitation when you have been added as a client contact by Milsted Langdon.

You may need to check for this email within your junk folder, depending on your email security settings.

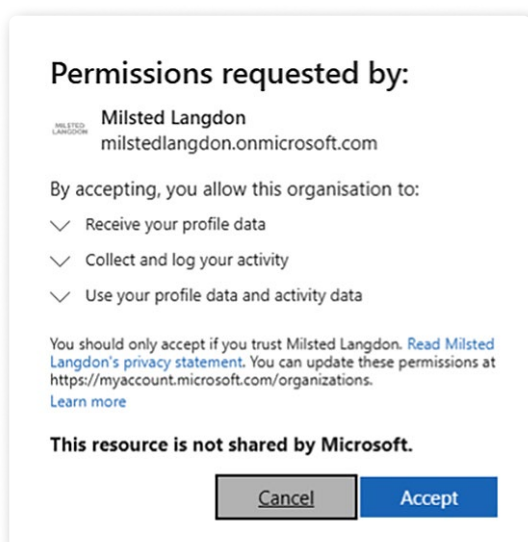
The email you receive will look like the below. Please do not reply to the email as it will not reach anyone.

To accept the invite, please click '**Click Here to Accept**'. This will be highlighted in orange within the email, as shown below.



If you have a Microsoft email account you will then be prompted to sign in to your Microsoft account so you access the portal. If you don't have a Microsoft email account, you will be prompted to click on a button that will send a verification code to the email address that we have registered for you.

Once you have received the verification code, you will need to enter it where prompted and then select '**Sign In**'. You will then have access to the portal.



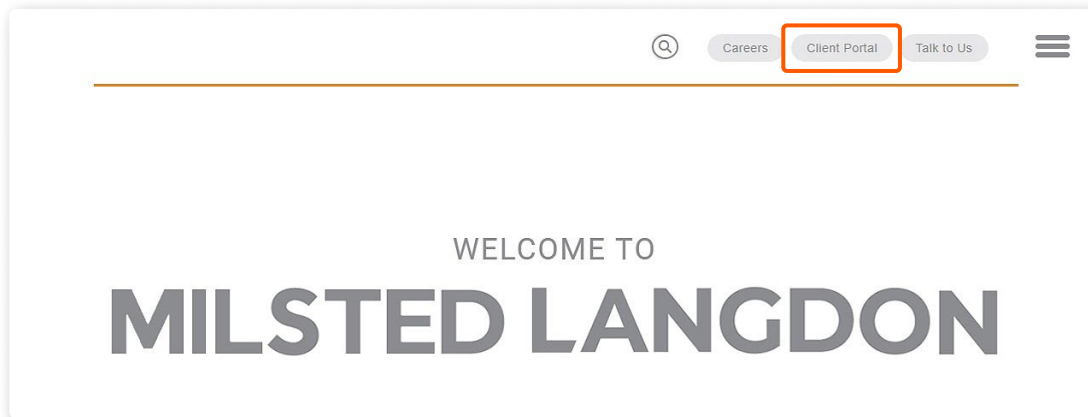
If you agree to the permissions we request, you can '**Accept**' these on the screen opposite. Please note that you will need to accept these permissions to gain access to the portal.

Once accepted you will be taken into your portal.

If at this point, or at any point when using the client portal, you have any issues then please email advice@milstedlangdon.co.uk or get in touch with your usual point of contact at Milsted Langdon.

2. PORTAL ACCESS

You can access the portal by clicking the link in the notification email you receive when documents are uploaded to your portal, or at any time by visiting our website and selecting '**Client Portal**' at the top of the [homepage](#).

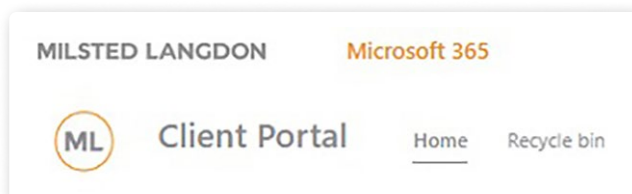


You can also access it directly via this link: [Client Portal - Home](#)

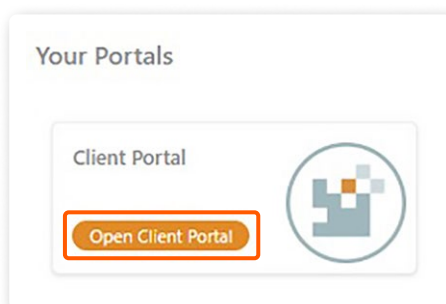
3. PORTAL FEATURES

a. Homepage

The client portal will have a ribbon at the top of the page that looks like this.



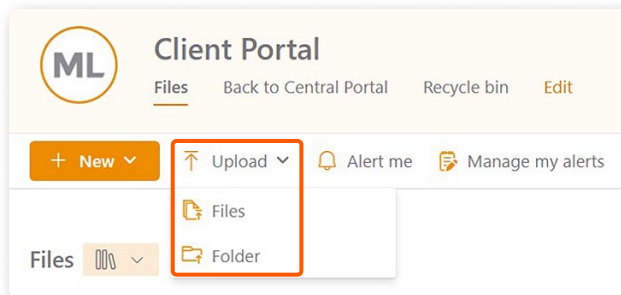
You will then be able to see the portals you have access to, as below.



Click on the '**Open Client Portal**' to go to that portal and your documents will be stored within.

b. Uploading a document to the portal

To upload files to the portal you can simply click on **'Upload'** and then **'Files'** or **'Folder'** and browse for the file(s) you want to upload on your device.

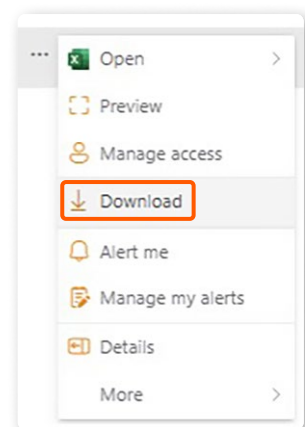
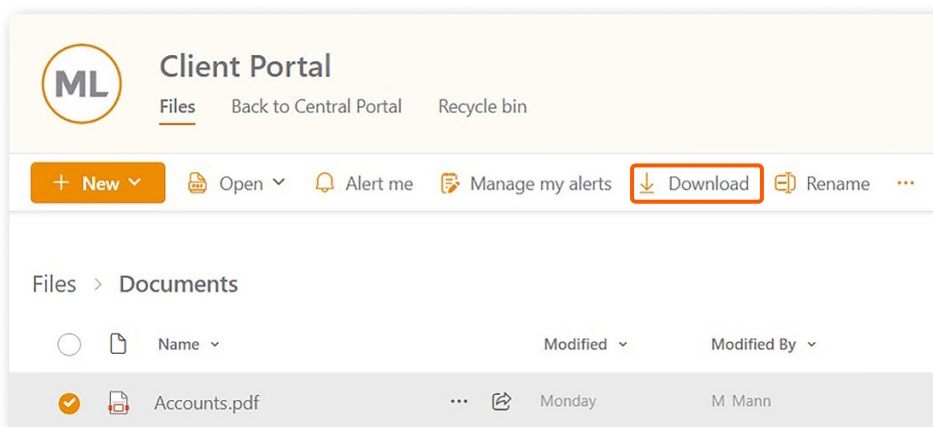


Please note for large data backups please continue to use our large file upload wizard, which can be found here: [Large File Upload Wizard](#)

c. How to download a document

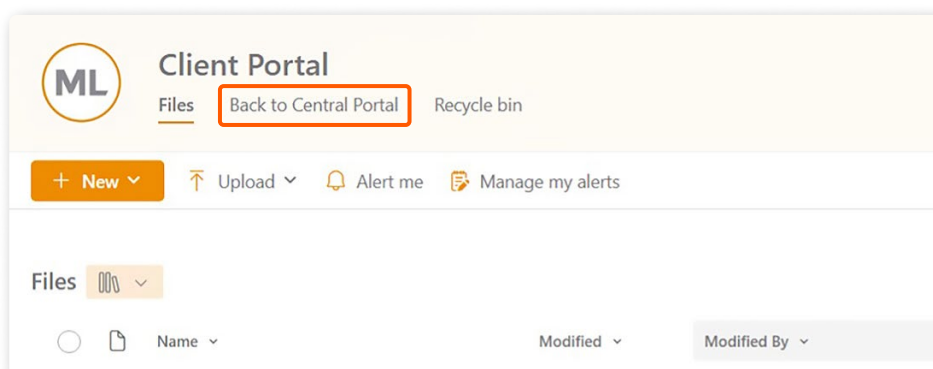
Locate the document you want to download and tick the box to the left of the document name.

Then either click the **'Download'** button on the ribbon, or click the three dots to the right of the document name and click **'Download'** from the list of options.



d. Getting back to the Central Portal

Please click on the **'Back to Central Portal'** button as shown below.



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