Sending /upload client files

- Via File Tab
    - Click upload file
    - Click Browse
    - Find file you would like to upload, click the file and click open
    - Client Number is a drop down arrow
        - If you know which client code you want the file to be listed under click the client code – If you do not this is an optional field so you do not have to choose any
    - Add any notes in the Description field
        - Example – File upload; Itemized statement
    - Click Save and the file has been sent

At this time you do not have the ability to see files that you have sent using the file tab. This is option may come in a later upgrade of Client View.