# Accessing My Client Portal with Canopy

6 Steps <u>View most recent version</u>

Created by Amanda Lynnes Creation Date August 30, 2023 Last Updated August 31, 2023

Created with Tango

#### STEP 1

## Click on invitation email from PRIMENUMBERS to access the client portal.



#### STEP 2

## **Click on Create account**

PRIMENUMBERS < notifications@prin To: You	mecpa.clientportal.com>	← ≪ → … Wed 8/30/2023 2#5 PM
	Prima + NUMBERS+ HENDRIGHT NOT	
	Your PRIMENUMBERS Client Portal Invitation	
	Client	
	Joe Braun has invited you to create a client portal account.	
	Signing up is simple and only takes a few seconds. Please click on the link below to get started.	
	Create account	
	PRIMENUMBERS 5129 44m St 3 Frago, North Dakkal, 58104 (201) 356-7531 www.ptime.cpa	
	App Store Google Play	
S Keply Forward		



## Create a password for Canopy

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Phracy Policy Sign in			By clicking, I agree to the Terms of Service and	
Sign in			Privacy Policy	
			Sign in	
				-

#### STEP 4

## Be sure to click the box agreeing to Terms of Service and Privacy Policy

Prima
Please create your account.
Full Name* Email address*
Create password*
Very strong Thit password could be cracked in about 13843 years Confirm password*
By clicking, I agree to the Terms of Service and Privacy Policy Sign in



## STEP 5

# Click on Sign in

Prints
Please create your account.
Full Name*
Email address*
Create password*
Very strong This password could be cracked in about
13843 years Confirm password*
By clicking, I agree to the Terms of Service and
Privacy Policy

### STEP 6

# You have successfully logged into Canopy!

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Files   Billing   Schedule an appointment	To-do	
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