Client Access Site: Document Upload Guide

RAYMOND JAMES®

This guide will assist you with how to send documents to your Advisor team securely, via the Client Access Site.
Important: Any other individual that has access to your accounts via the Client Access site will not be able to see any documents that you have uploaded. Please ensure that you review the **Document Requirements** section prior to uploading a document.

Password Protection/Encryption
Ensure that your file is not password protected or encrypted prior to uploading it.

How to **Upload Documents to your Advisor Team**

STEP 1

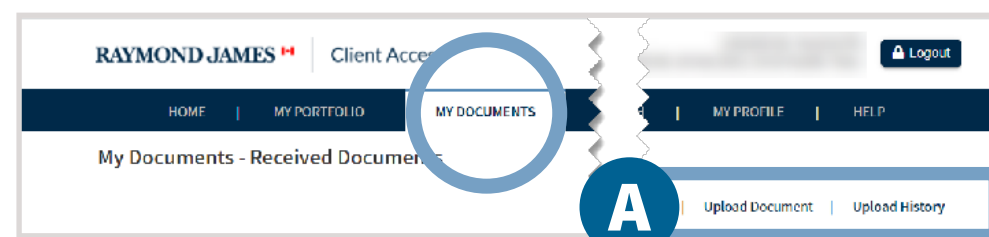You can access the upload tool from the **HOME** or **MY DOCUMENTS** pages:

From the **HOME** page:

A. Click on the **Upload Document** link in the **My Uploads** section of the page (right hand navigation bar).

From the **MY DOCUMENTS** page:

A. Click on the **Upload Document** link at the top right of the page (under the menu bar).

STEP 2

A. **Subject:** Type a Subject line for the message that will be sent to your Advisor team (ex. John Smith – March Statement).
Note: Maximum 100 characters.

B. **Message:** Type a Message for your Advisor team.
Note: Maximum 500 characters.
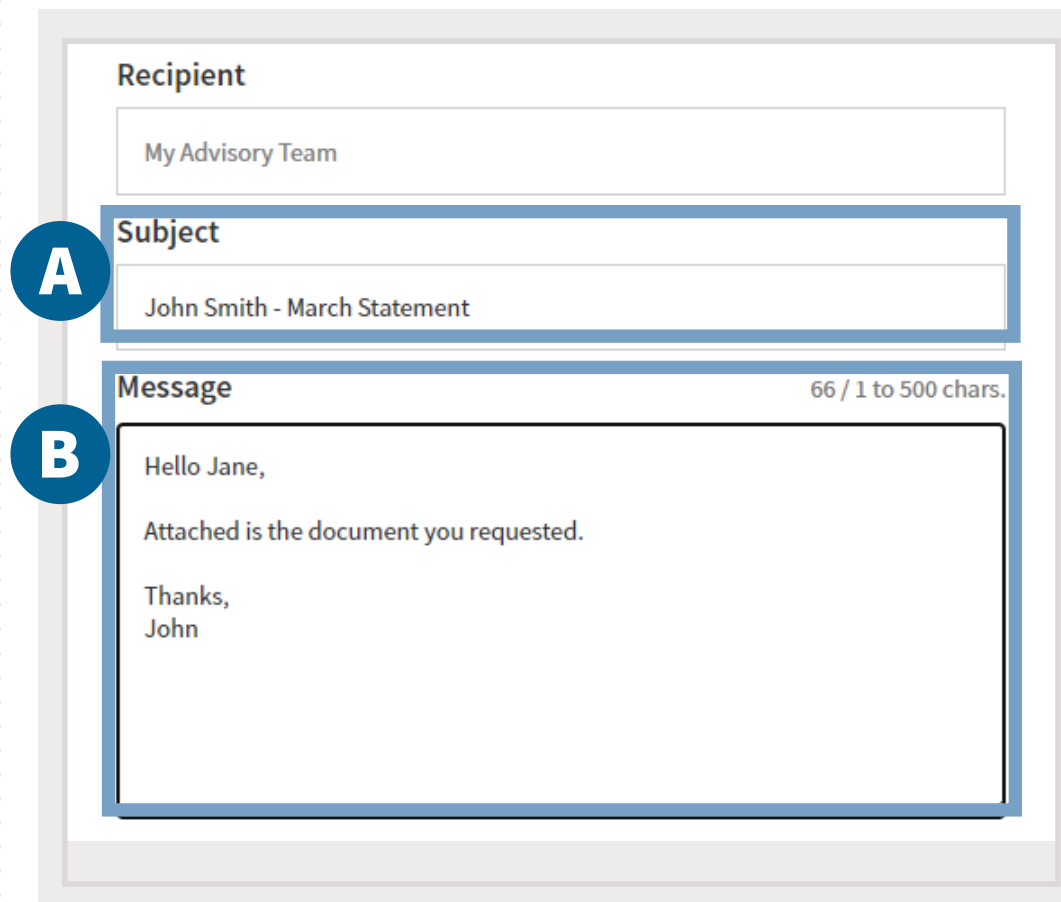
STEP 3

A. Ensure that your file meets all Document Requirements, and then click on the **Attachments** icon. You can also drag a file into the **Attachments box**.

B. Use the **Delete button** to remove a file uploaded by error.
Important: A file cannot be deleted once the message and file is sent.

C. Click **Send**.

Successful Upload: You are automatically directed to the **My Documents > Upload History** page.

D. **Unsuccessful Upload:** An **error message** displays to alert you that the Upload Document page is incomplete, and/or your upload does not meet system requirements.
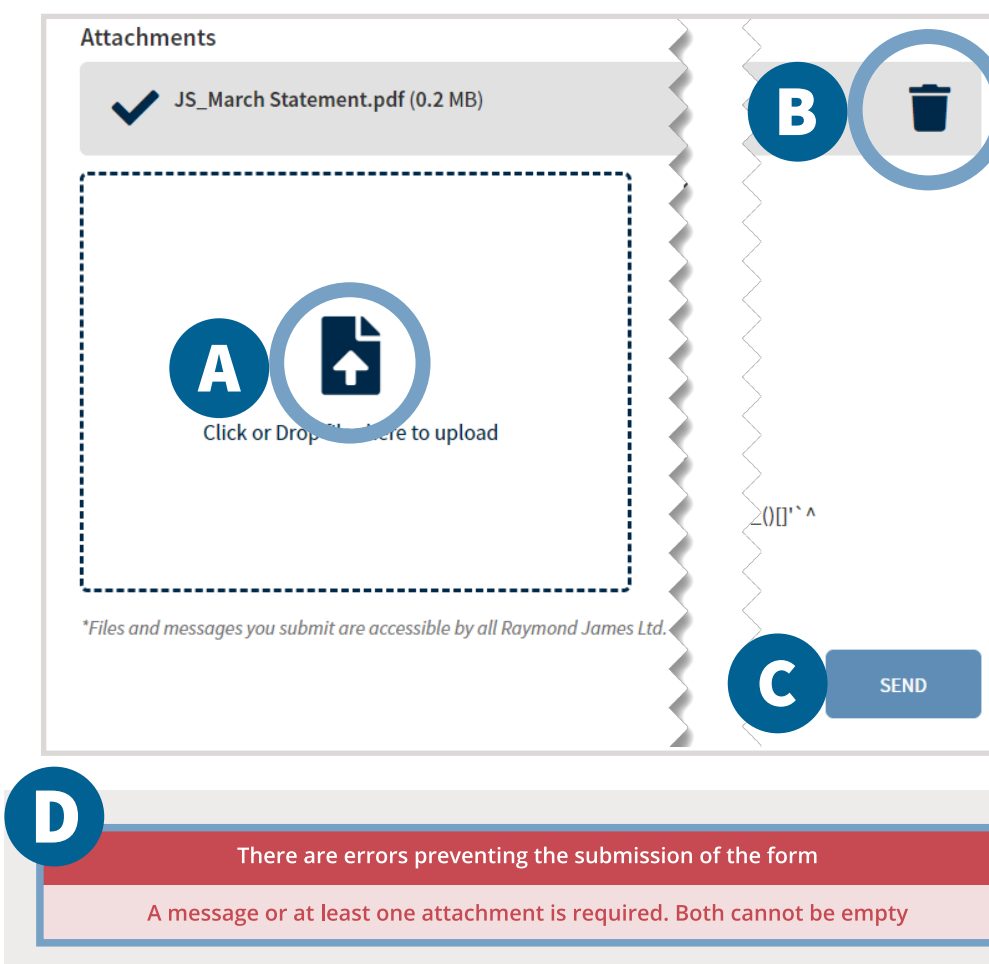
How to view **Upload History**

The Upload History page displays a list of all files that you have uploaded.
Note: Any other individual that has access to your accounts via the Client Access site will not be able to see any documents that you have uploaded.

STEP 1

To access your Upload History:

A. Click **MY DOCUMENTS**

B. Click on the **Upload History** link (at the top right of the page under the menu bar).

Use the **Filter results by** and **Order results by** options at the top of the page to locate a specific file (or scroll down the page).

Note: You can also access the Upload History page by clicking **HOME**, and then the **My Upload History** link (located in the My Uploads section of the page).
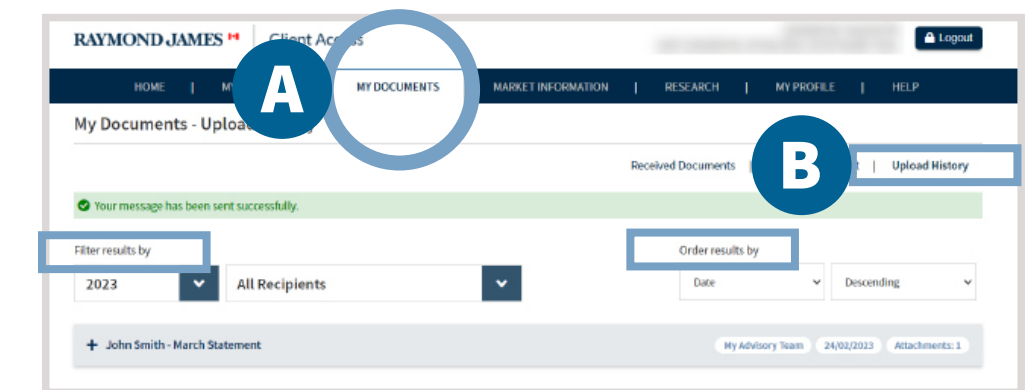
STEP 2

To view message and file details for previous uploads:

A. Click the **Plus Sign (+)** to the left of any file

Important: For security purposes, uploaded documents cannot be opened, viewed, downloaded or deleted. Reach out to your Advisor team if you have uploaded a document in error.