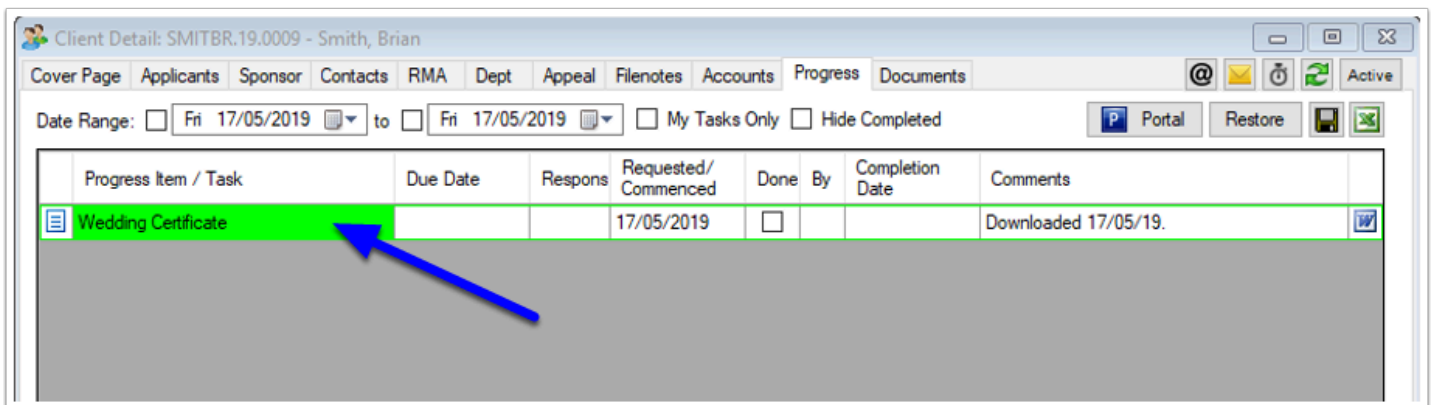


Re-Downloading a Document from the Secure Client Portal

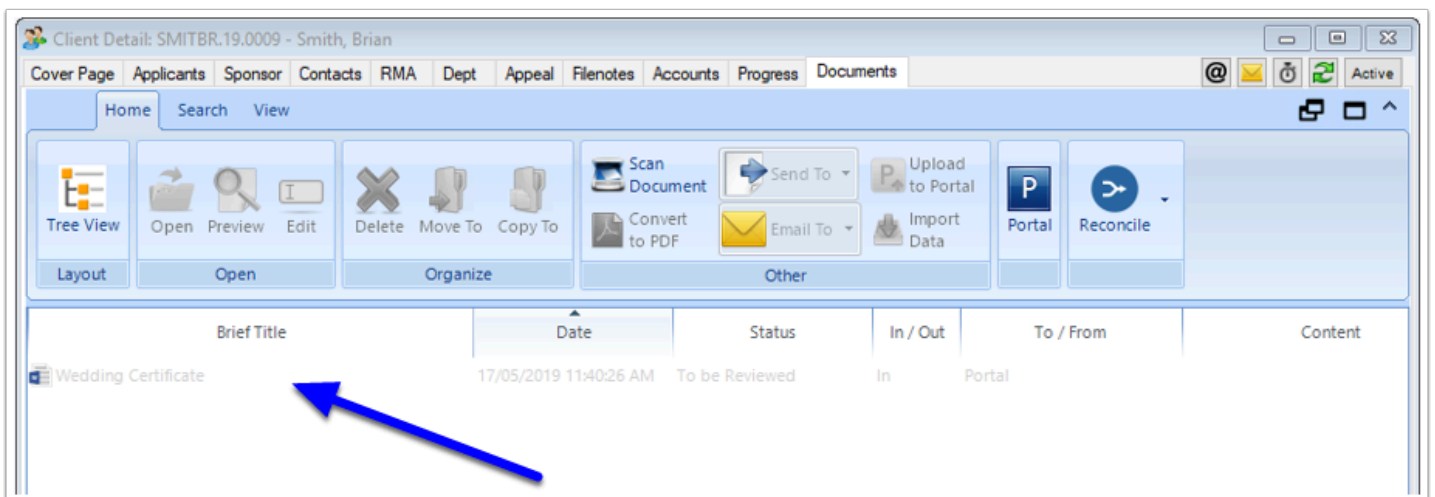
When a customer uploads a document to the Secure Client Portal, the document will then flow into Migration Manager as a document in the **Documents** tab of the Matter.

However, there may be a time when an Agent needs to re-download a document into Migration Manager from the Secure Client Portal. This would usually occur if the agent has accidentally deleted the document, or if the agent's network is having syncing issues and the file has not synced to their machine.

In the below example, we can see a Progress Item on the **Progress** Tab which has been downloaded.



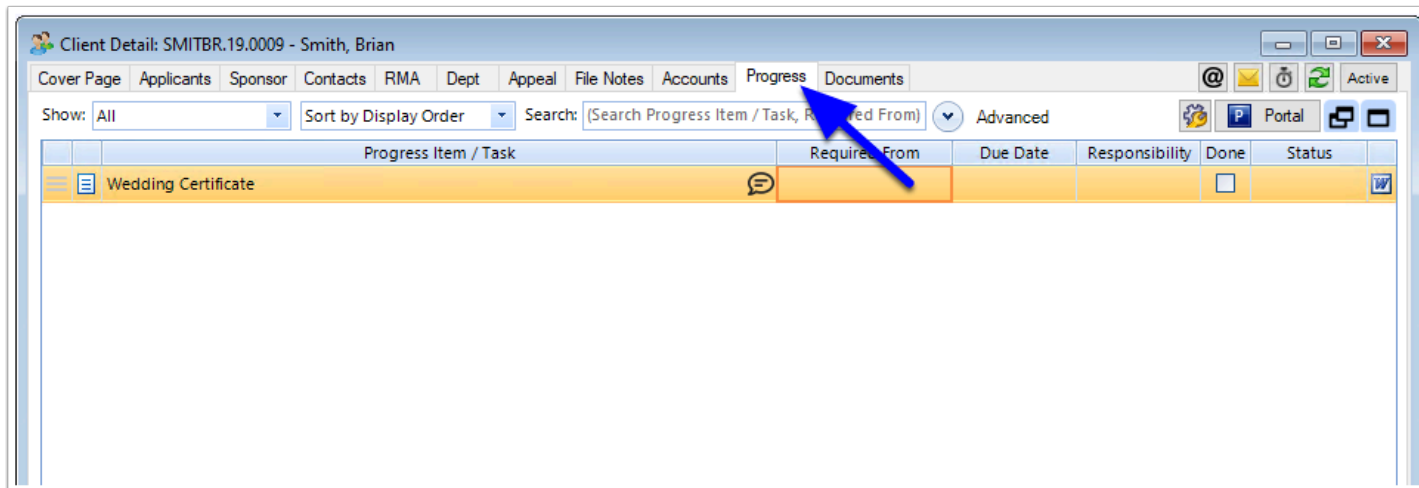
However, when we look at the **Documents** tab, we can see that the document is greyed out. This means the document did download to Migration Manager, but is not longer available (the document is no longer located where it should be).



Re-Downloading a Portal Document

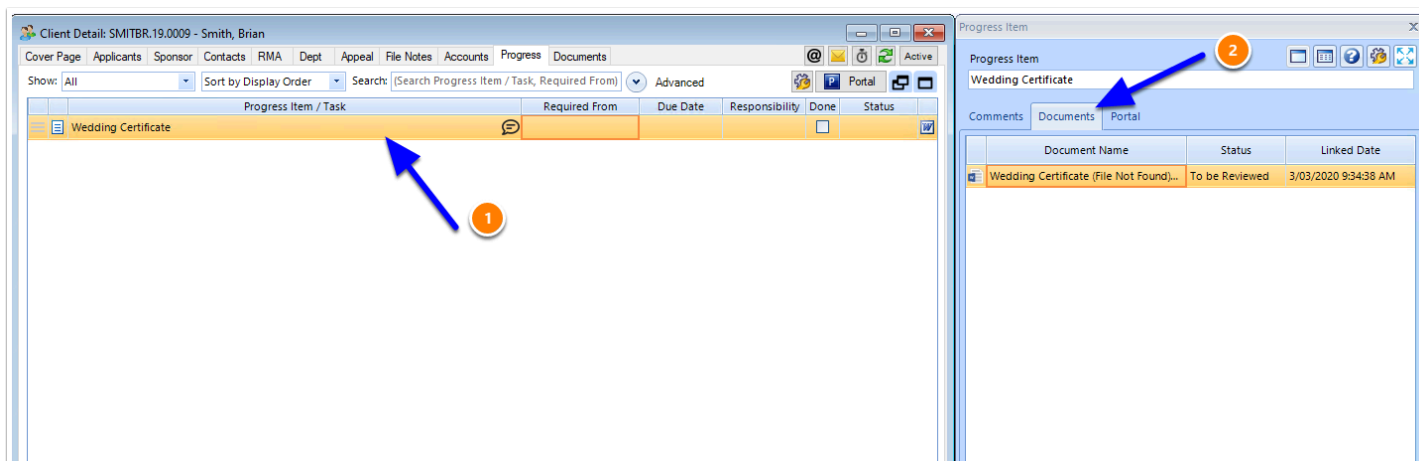
The Portal Document can be re-downloaded via the Progress tab

1. Go to the 'Progress' Tab of the Matter

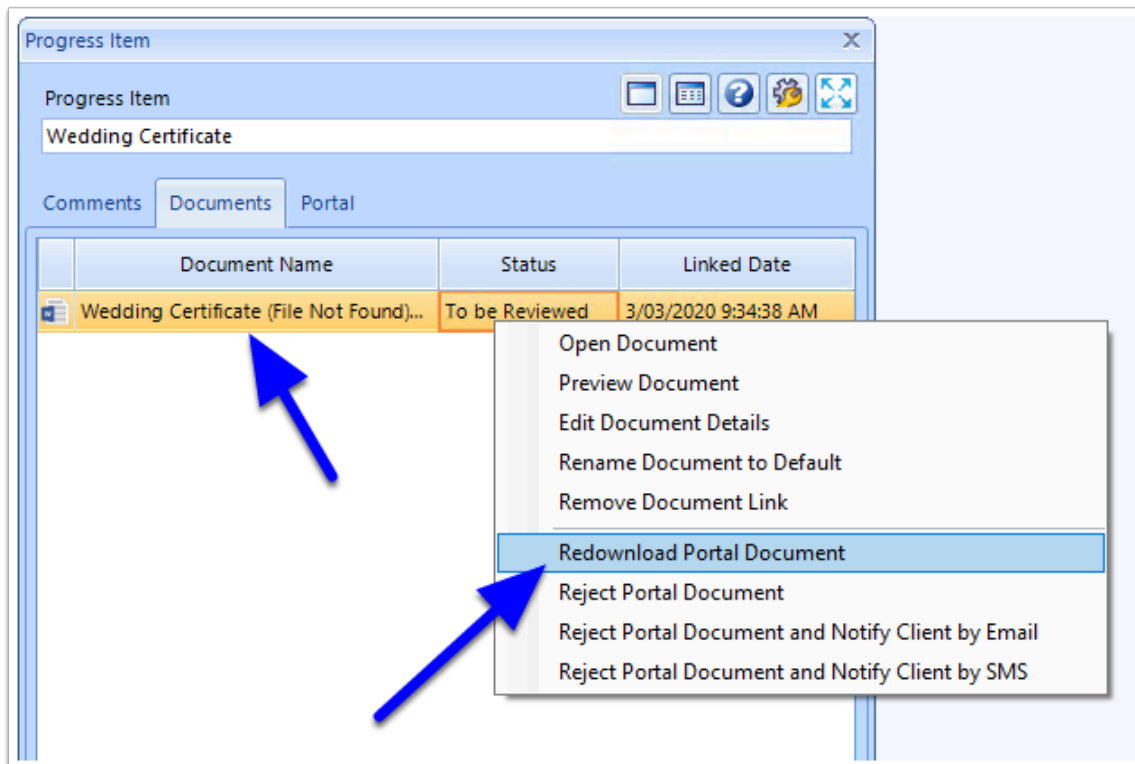


1.1. Go to the Documents sub-tab of the Progress item

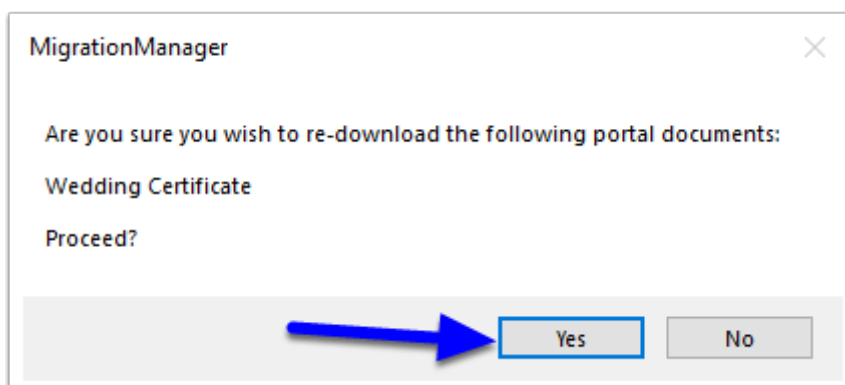
1. Double-click on the item to open the side panel.
2. Go to the Documents sub-tab.



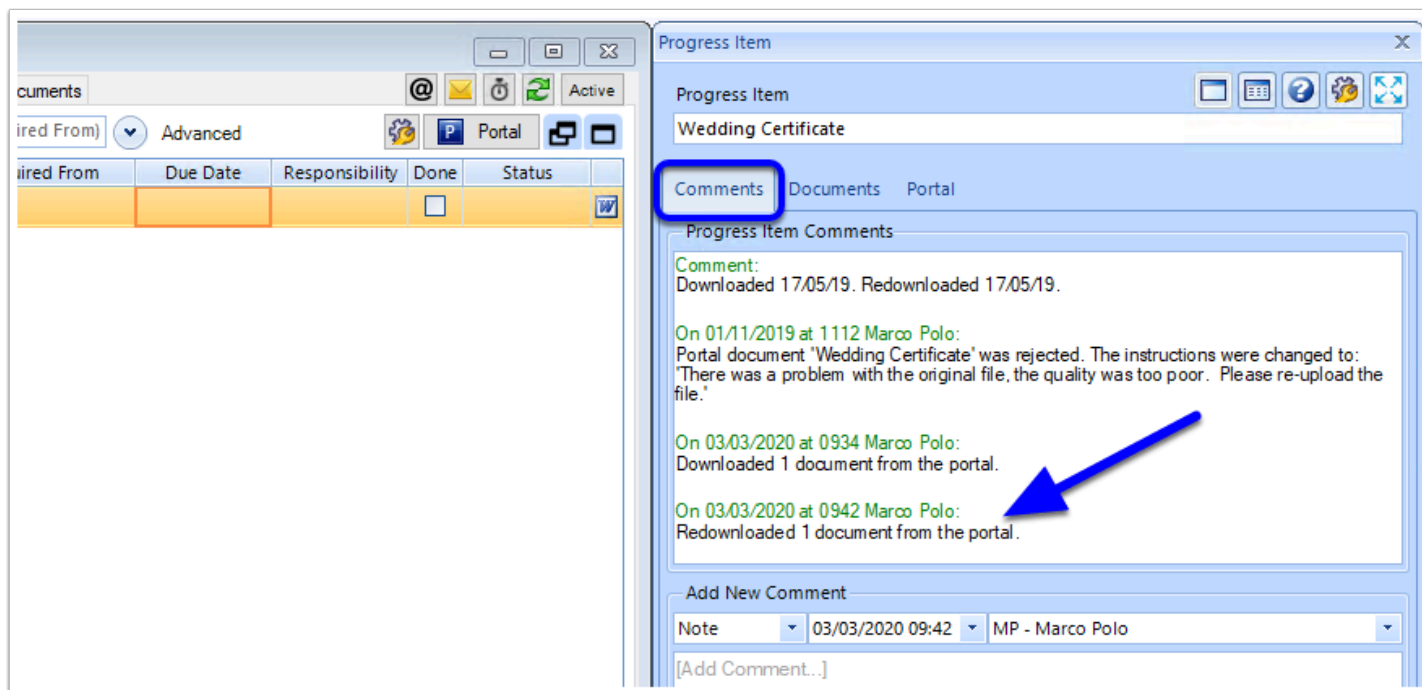
1.2. Right click on the Document to be re-downloaded, then select 'Redownload Portal Document'



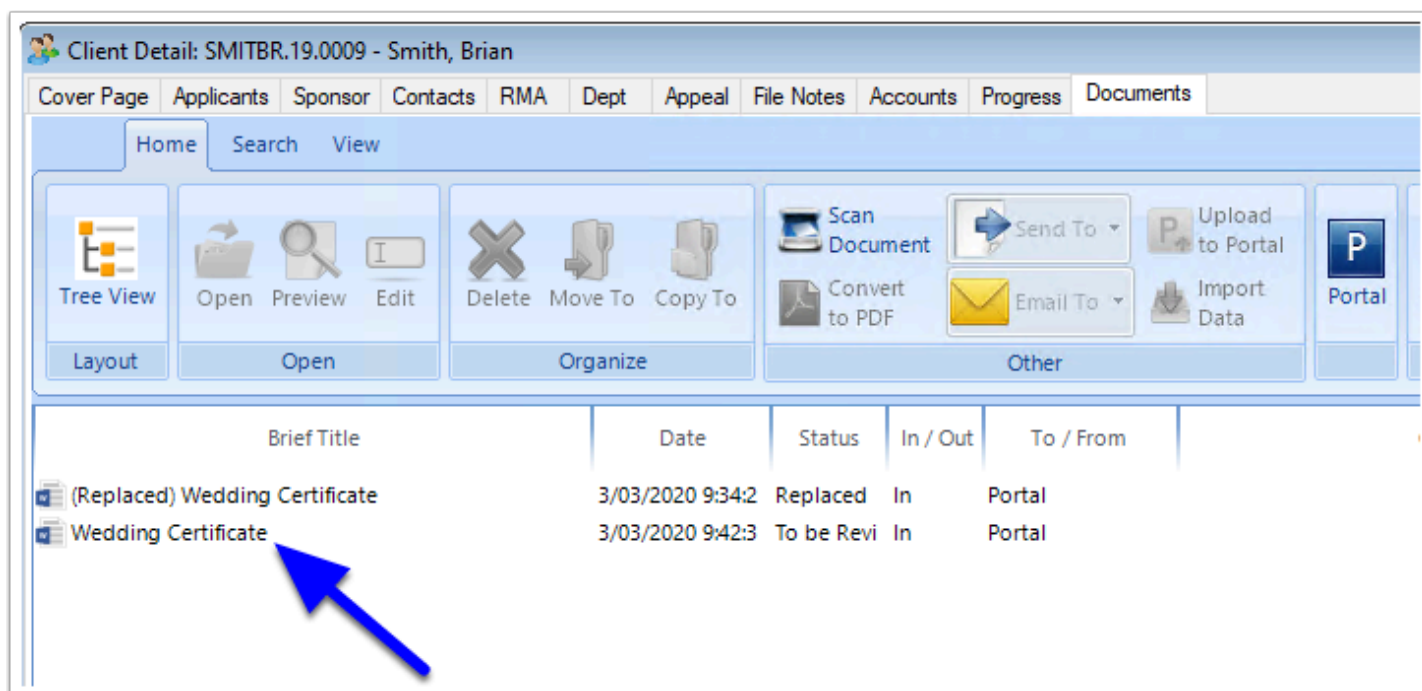
1.3. Say Yes to the message to Re-download



The Item on the **Comments** Tab of the Progress Item, it will now show that it has been re-downloaded:



As well as this, the document will now appear in the **Documents** tab of the Matter, ready to be reviewed.



Note: Documents are only available on the Portal for a set time after they have been downloaded to Migration Manager. After this time, they are no longer available in the Client Secure Portal and will need to be re-uploaded to the Portal by the customer.

To view or change the number of days to keep in the file in Portal after download, go to **Tools** => **Administrative** => **Preferences** => **Portal** tab.

Preferences

Program-Level | User Permissions | Report Permissions | User Preferences | eLodge


Accounts | Dept | Email Capture | Emails | Filenotes | Files | Firm | Letters | Logins | Misc | Open File | Portal | Questionnaires | Snapshot | WebLeads

Portal Details | Portal Email 1 | Portal Email 2 | Portal Email 3 | Portal Email 4 | SMS | Terms and Privacy

Portal URL:

Your Client Portal URL is based on your Firm Name as recorded in the Firm tab. If you want to change your Portal URL please [contact Support](#)

Portal Logo



Downloading Documents from the Portal

☒ Download documents automatically whenever they become available

☐ Download documents automatically between these times: and

☐ Download documents automatically when MM is started

☐ Download documents manually

Portal Messaging

☒ Allow Clients to Send you Messages from the Portal

Document Inbox

Send notifications about received documents to ☒ RMA ☐ Manager ☐ Clerk

Document Deletion

Delete documents from clients from the portal days after they've been downloaded by you

Delete documents uploaded by you from the portal days after they were uploaded by you

Default Contact Details

Show the name, email address and phone number of the ☒ RMA ☐ Manager ☐ Clerk

Show the address of the ☒ Office ☐ RMA