Client Access Site | Multi-document Download

STEP 1

A. Click **My Documents**

B. Select the category of document you are looking for.

   Note: Only Statements, Trade Confirmations and Tax Documents are available for multi-select download.

C. To select and download all documents from a category, click **All**. To unselect all documents, click **None**.

**D.** To select individual documents, click the checkbox on the left of the desired document.

E. Click **Download** Selected in the panel that appears. The panel shows the number of documents selected.

Note: Each document type (Statements, Trade Confirmations, Tax Documents) will have its own download panel.
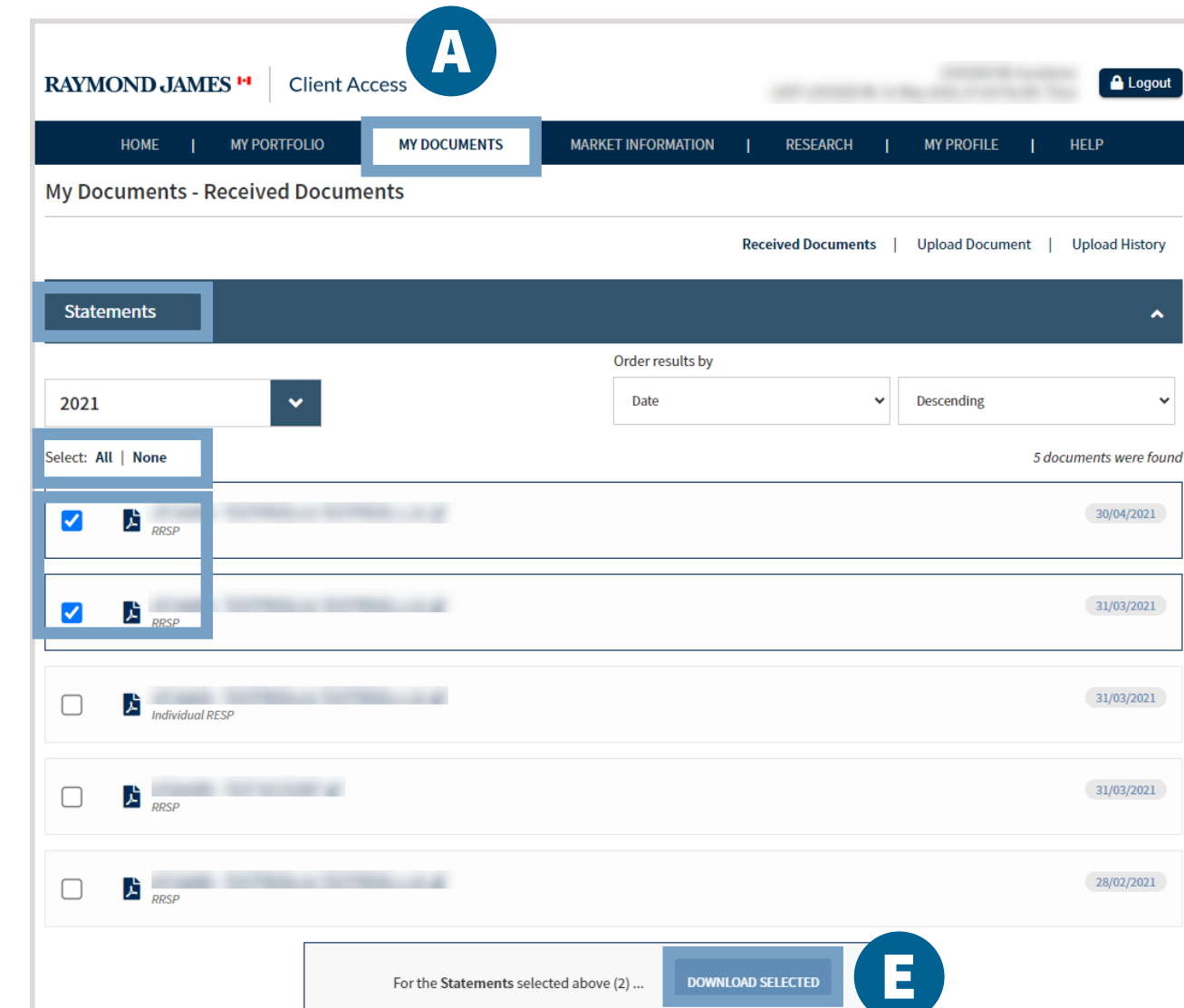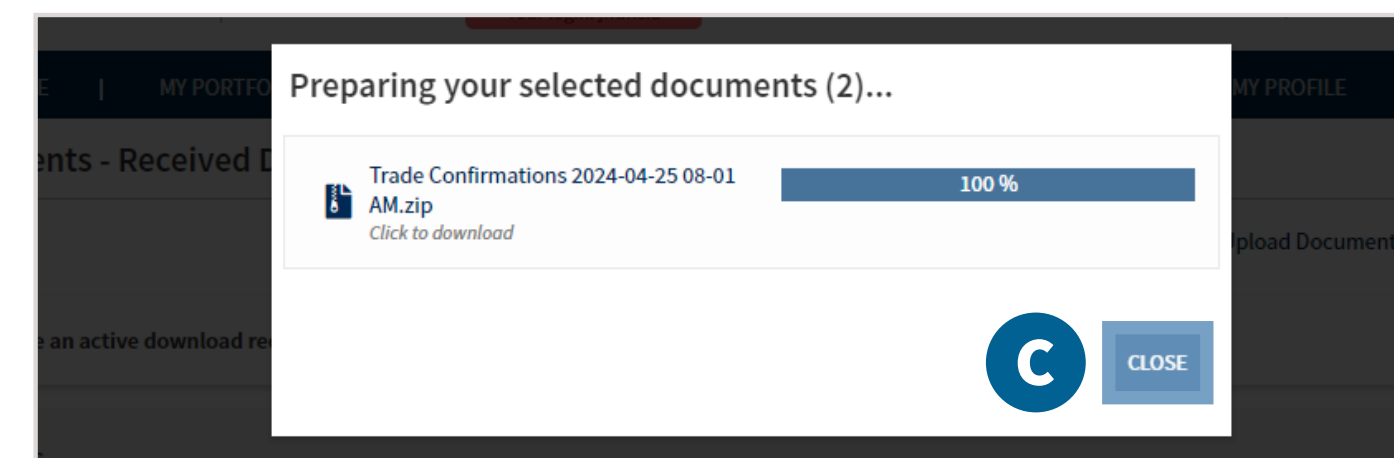

STEP 2

A. After selecting multiple documents and clicking download, a progress bar displays.
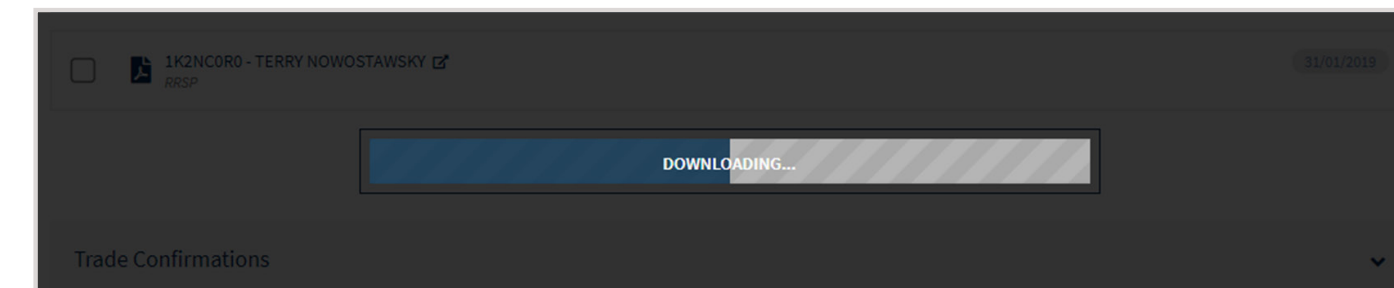

B. Click on the text within the pop-up window to access the files once a batch of files has downloaded.

C. Click **Close** to exit the pop-up at any time to resume browsing the Client Site.

Note: After clicking **Close** you will be returned to the My Documents page and a message with a link to the active download request will be displayed. Click the link to return to the download processing window.
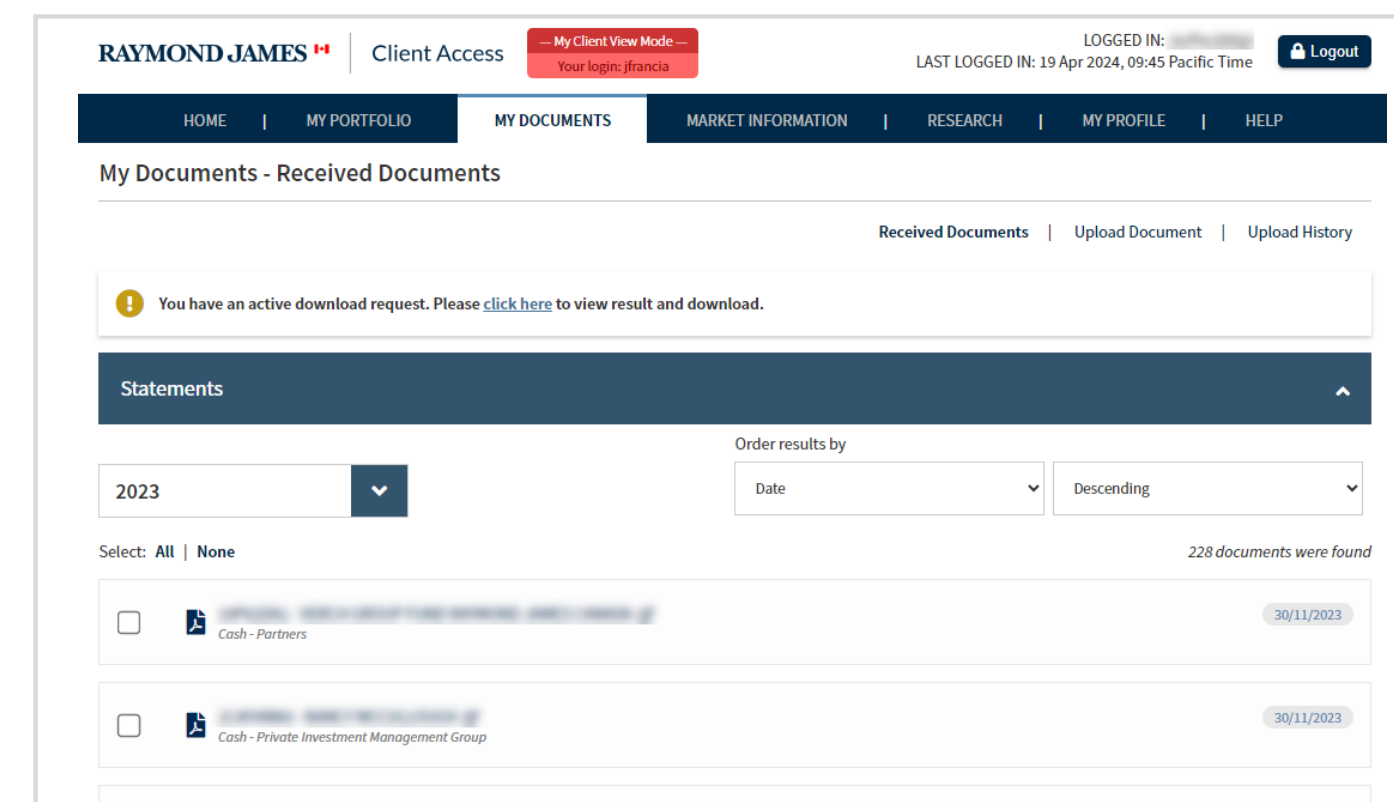
Note: You can start file downloads on one device and view/process the download on other devices. Downloads are only available for 24 hours after completing the download process. After a file is saved to your local device it is removed from the list of files available for download. Download failures will produce a text file (.txt) within the ZIP file which identifies the error.

Desktop Site V.S. Mobile Site

On the desktop version of the site, up to 100 documents are saved in ZIP files accessible in the Downloads folder on your local drive. Selections exceeding 100 documents will be broken up into multiple ZIP files. The naming convention for the compressed files is <document type>.zip

On the mobile version of the site, individual PDF's will be downloaded with the naming convention <Account ID><Document Type><Year>.PDF