



Client Access™ Portal User Guide

Icon Legend



Tips

Best practice tips and shortcuts



Notes

Informational notes about functions



Warning

Important warnings about a function

Logging in to Client Access Portal

Refer to your welcome email for the temporary password needed for your initial login to Client Access.

Login



Login Tips

- The Login ID (email address) is not case sensitive; the temporary password is.
- You will be required to change your password upon logging in for the first time and answer security questions. Your security questions can help you access your portal if you ever forget your password.
- Your new password may be from 8 to 32 characters in length, must contain at least one alpha character, one numeric character, and one special character (e.g. !, @, #, etc.). The password is case sensitive.
- Your password may be reset at any time by clicking **“Forgot password?”**.
- If prompted, review and agree to the [firm name] end user license agreement. You can also download a copy.

Downloading files from Client Access

Client Access Home Page



If you have access to more than one Portal, click **Select a Portal** at the top, left-hand portion of the page.



After logging in to Client Access, you will see a list of folders used to organize your files. **Click on a folder to display its files.**

Download Files



To download a file, simply click the file name or check the box and click **Download**, either option will launch your browser’s file download prompt allowing you to open or save the file.



To download files, it may be necessary to disable your pop up blocker in Google® Chrome®, or other web-browsers

Uploading files to Client Access

Upload Files



Follow the steps to add a file to you Client Access portal:

1. Click the destination folder (where the file will be located)
2. Click **Upload**, browse to and select the file(s) you wish to upload
3. Click **Open**
4. The **Upload Queue** will launch automatically. Click **Upload All** to upload the displayed file(s) to Client Access.

Upload Queue




You will see an on-screen confirmation that your file(s) were successfully added to Client Access. Return to your Documents or simply close your browser window to exit Client Access.



You can also drag-and-drop files into the destination folder to activate the Upload Queue. Once the Queue is displayed, click Upload All and your files will be added to Client Access.



Click the  icon at the top, right-hand corner of the page to reactivate the Upload Queue if you accidentally minimize it prior to selecting Upload All.

Changing Passwords and Logging out



At the top right-hand portion of the page, click the arrow to view your user options. From this menu you can change your password or Log out of Client Access

User Options