Taylor Accountancy Corporation

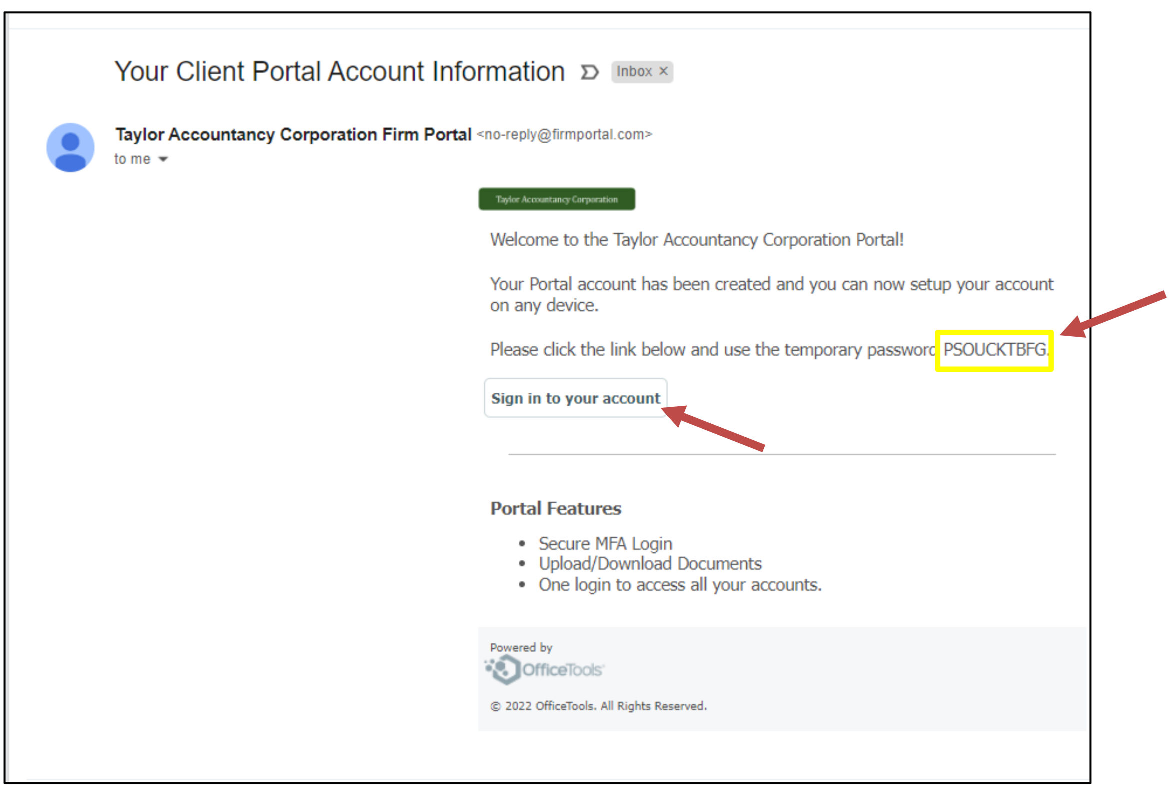
OfficeTools Client Portal Instructions

Things to keep in mind:

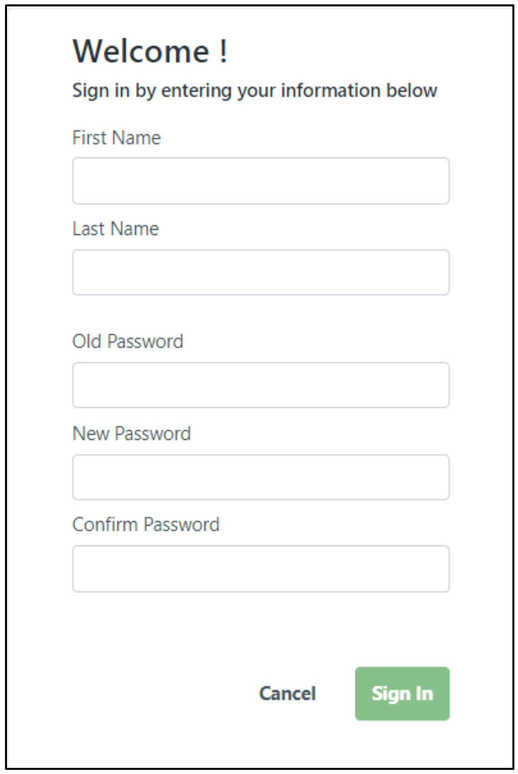
- *All emails pertaining to the client portal will either come from Tayloracctcorp.com or Firmportal.com. Please add these to your emails 'Do Not Block' list.*
- *You will receive two emails initially; one will inform you that you have been given access to your (or your entities) portal account. It will contain a link to log in to the portal, but you will not be able to log in until you have set up your account. The other email will give you a temporary password and a link that will take you to the account set up page.*

Setting up your account

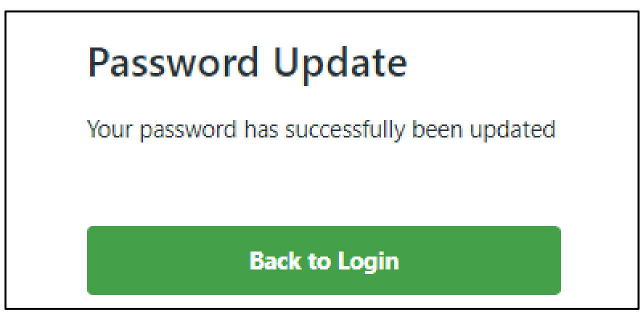
1. When we set you up on the account portal you will receive two emails. The important one will come from "no-reply@firmportal.com" and will have the subject line "Your Client Portal Account Information". Copy the temporary password given and click on the link to set up your account.



2. Here you will be taken to a page to set up your account. All emails will be sent hereafter under the name that you place in here. Please be sure to record the password that you create here.

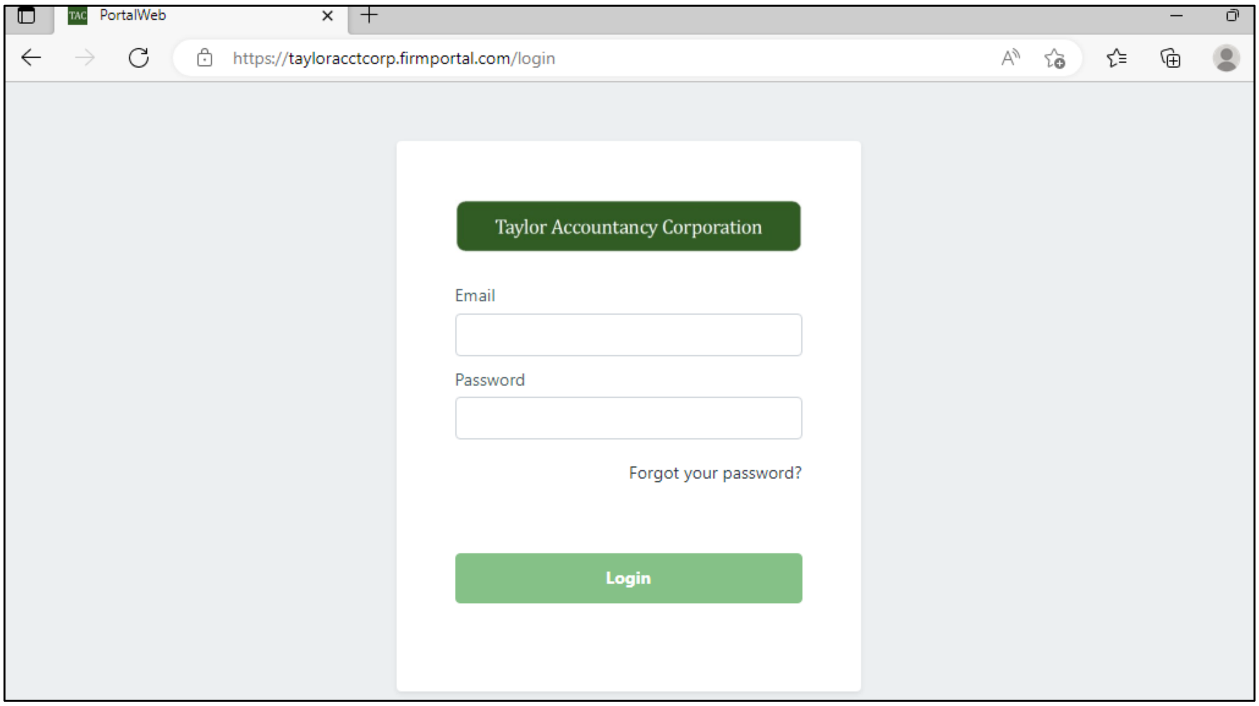


3. If everything is entered correctly, you will see this message. Click on the link to be brought to the login page.

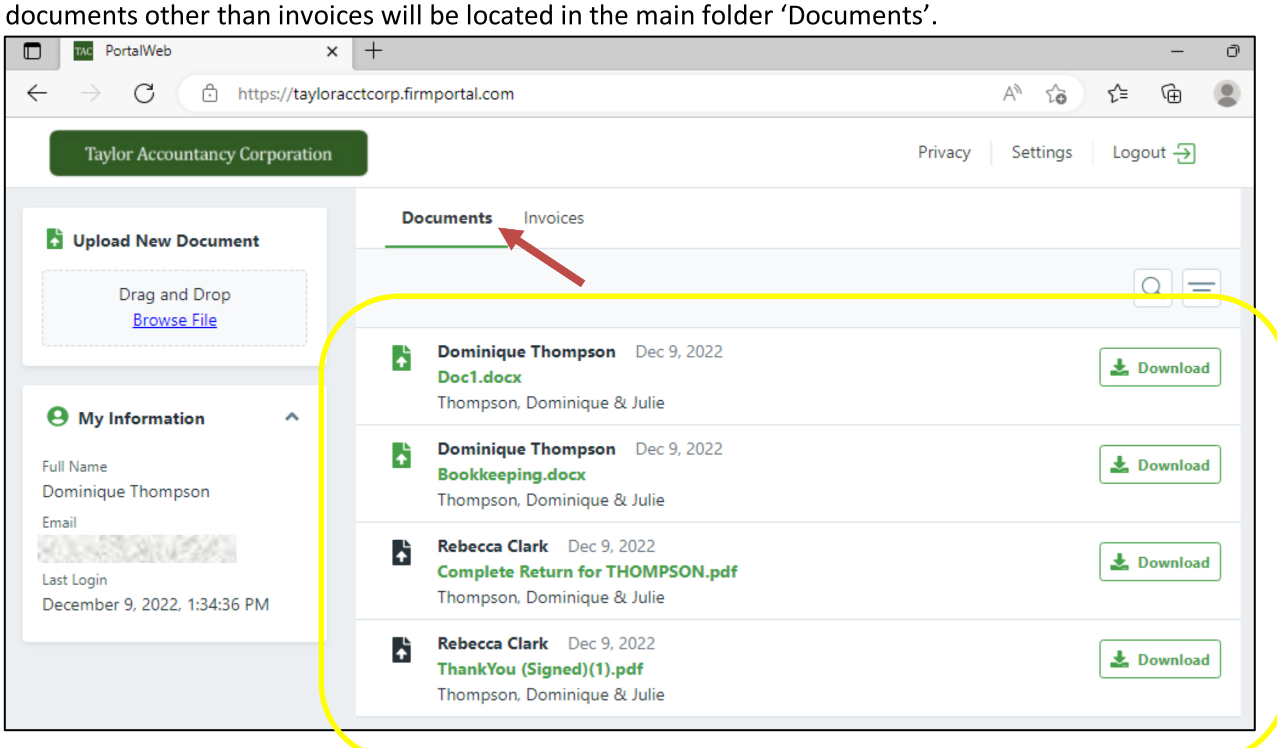


The client portal

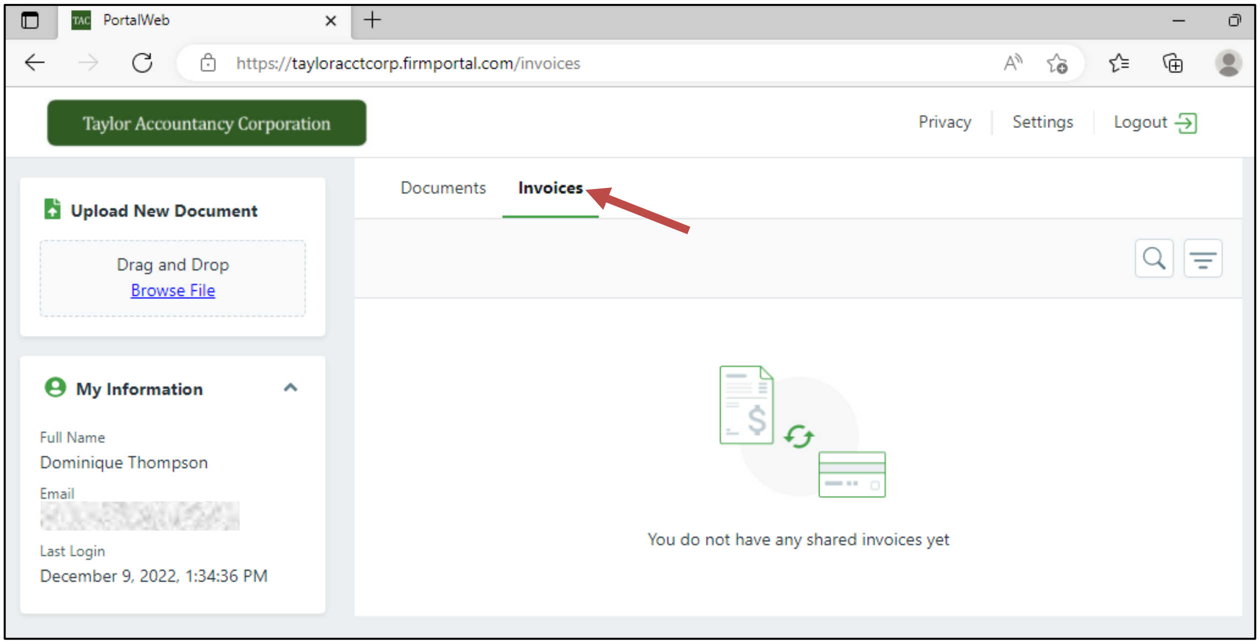
1. This is the main login page for the new portal. You can access it using links in emails you receive if we send documents to you, by the link on our website, or at the address [*tayloracctcorp.firmportal.com*](https://tayloracctcorp.firmportal.com). We are not able to access the password that you have set up, so if you do not remember it, use the 'Forgot your password' link to reset it.



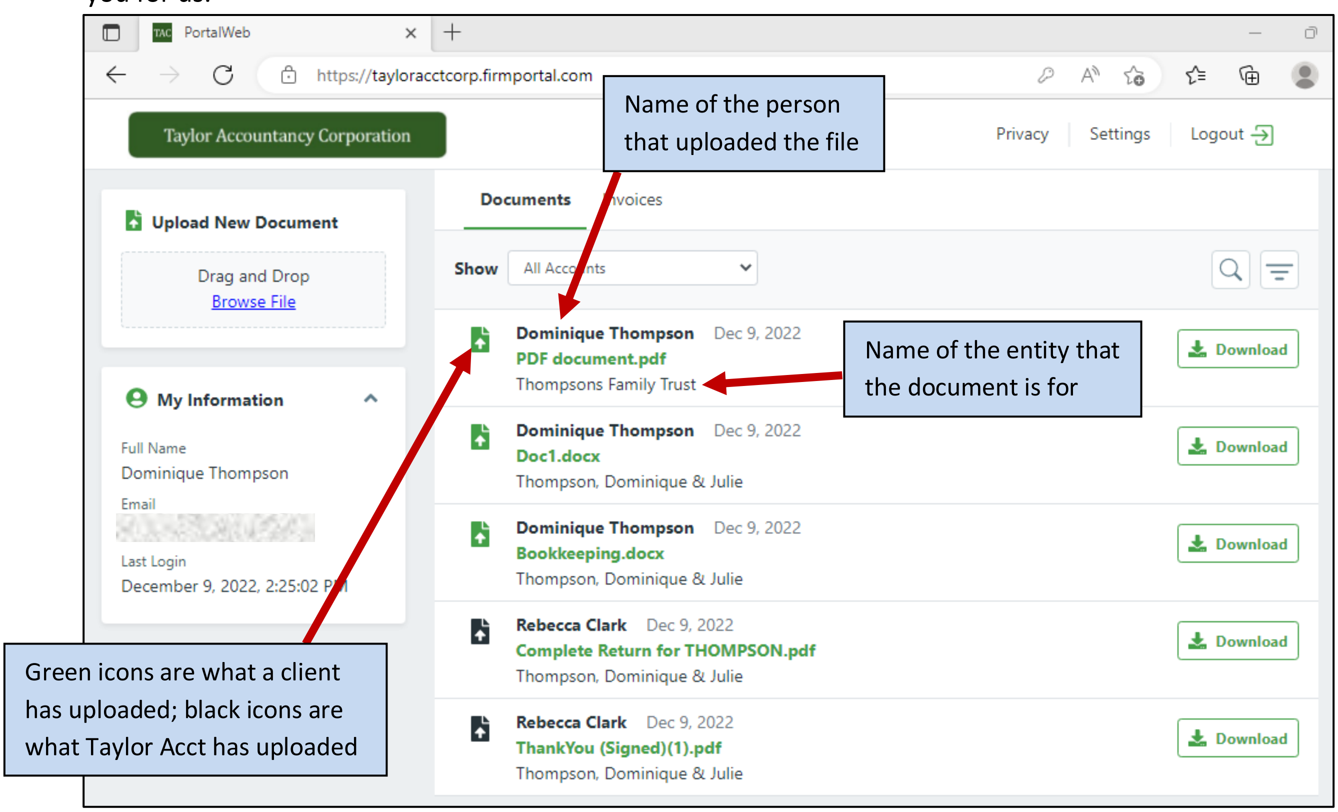
2. Here is the main page of the portal. There are two tabs where documents could be located. All documents other than invoices will be located in the main folder 'Documents'.



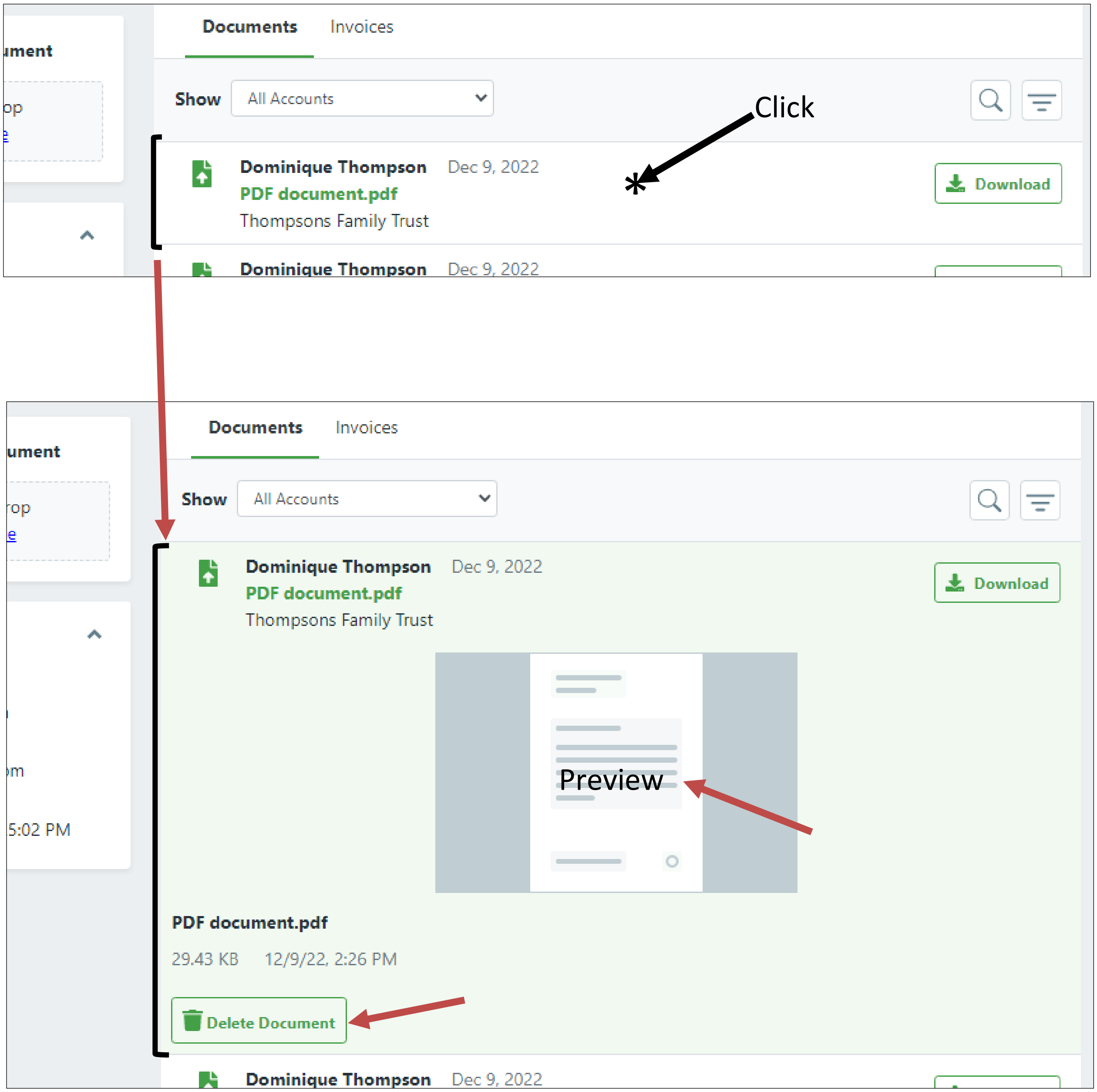
3. **When we update our process so that invoices flow to the client portal**, you will be able to locate your invoices under this tab.



4. Each document shows: who uploaded it, the date it was uploaded, the name of the document, and which entity it is associated with. In addition, a black icon to the left indicates that the document was uploaded by us into the portal and a green icon indicates that it was uploaded by you for us.

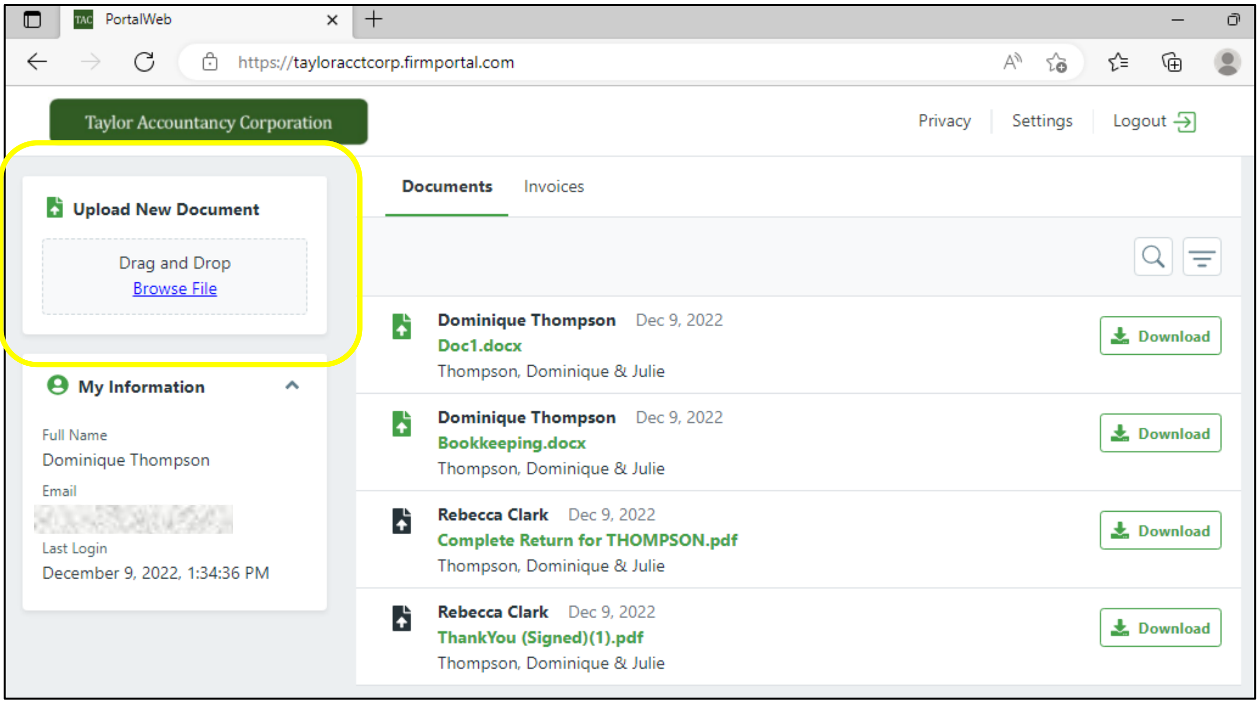


5. To show more options and information for a document, click on its box. This will allow you to see a preview of the document or, if you uploaded it, to delete it.

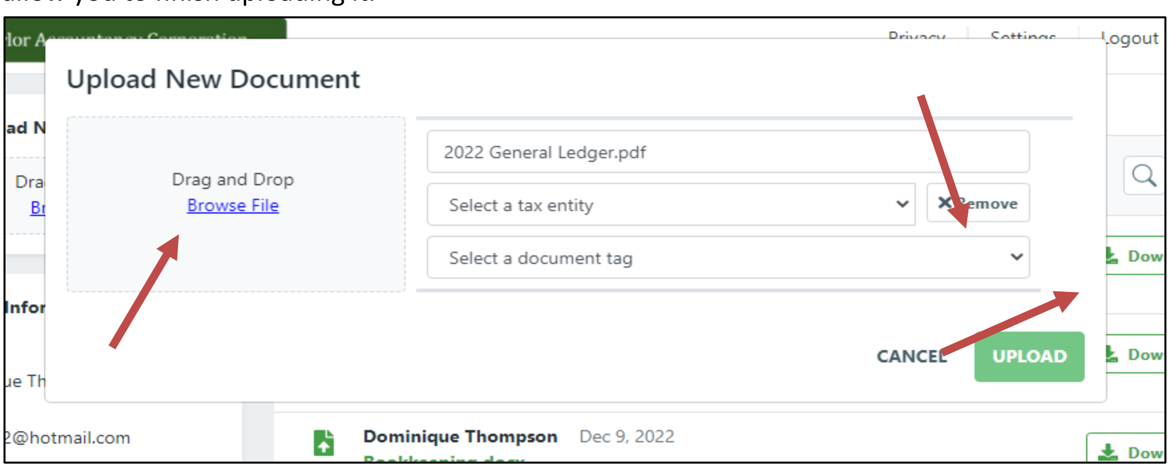


6. If more than one entity is accessible by your account, then most of the screens will have a drop down allowing you to choose which entity you want to view information for.

7. To upload your documents into the portal, either drag and drop the file onto the ‘Upload New Document’ box, or click on ‘Browse File’ and locate your document on your computer using the browsing window that pops up. (Multiple files can be dragged in/uploaded at a time)



8. When you upload a document, this popup will appear. From here you can upload more files, specify which of your entities the file is for, and select what category the document falls into. If you don’t have any entities associated with you (i.e. we only handle your personal taxes), ‘Select a tax entity’ will be filled in for you and you won’t be able to change it. For those people who do have multiple entities, you will *HAVE TO* choose which entity the document is for or it won’t allow you to finish uploading it.



9. You will receive an email informing you any time that we upload a file into the portal with you. Conversely, we will automatically be notified if you have uploaded a document into the portal for us.