CLIENT PORTAL INFORMATIONAL GUIDE

The FGMK Client Portal is a secure, encrypted portal account. It is used for secure file transfers and continued access between FGMK and our clients.

Your initial login information will be provided via email. This Guide provides information on frequently asked questions. For questions regarding a "User not found" message, uploading errors, etc., please contact Alexandra Key via email at akey@fgmk.com or by phone at 847.940.3277.

RESET PASSWORD

1. Go to: https://fgmk.com/client-portal/.
2. Click on the green Client Portal Access box.

CLIENT PORTAL ACCESS ➤

3. Click on *Forgot Password,* leaving the User ID and Password blank.
4. On the next screen, enter your full email address as your User ID, then the characters in the blue box. Click *Next.*
5. On the next screen, select "Email to" (your email address will display) to receive your verification code. ***DO NOT USE YOUR PHONE NUMBER****.* Click ***Send the Code.***
6. After receiving your verification code, enter it in the box indicated. Create your new password.
7. The Login screen will appear. Enter your User ID and new password. Click *Login.*

   Note: You may be asked to verify your identity through a second verification code.

ADD A PORTAL USER

1. If you have more than one portal, select a portal from your list to the left of the page under *Select a Portal.*
2. Click on the portal you wish to access. Once there, click on *Client Users* at the top right of the page, just under your name and to the right of Files.

   Note: If you currently have more than one user on a portal, the other users will display on a list here.

For Users new to the Portal

   a. Click on *Add New User* to the left of the page.
   b. Enter all required information.
   c. Click *Save and Close* to the right of the page.

For Existing Portal Users being added to a New Portal

   a. Click on *Add New User* to the left of the page.
   b. Click the *Assigned Portals* tab. Click *Assign More Portals.*
   c. Type the portal name in the search bar that you wish to assign to the new user.
   d. Click *Save and Close* to the right of the page.

Note: If you want a user to have access to more than one portal, follow the above steps in each portal.

DELETE A PORTAL USER

1. If you have more than one portal, and the user has access to all or some of the portals, _you can choose to remove access to the current portal only_. To do this, simply uncheck the *Grant Access* box and check *Yes*. The user will disappear from the current portal but will still have access to other portals linked to their name.

2. _If you wish to delete a user completely from a portal_, check the box to the left of the user's last name. Click on the box with the 3 dots next to the Edit box and click *Delete*. Select *Yes* to confirm permanently deleting this user.

Notes:

- If trying to delete a user who is currently logged into the portal, a confirmation box will appear asking if you would like to continue with the deletion of the user.

- If the user you are trying to delete is a portal administrator on any portals, you will not be able to delete this user. You will have to contact FGMK directly to have the user deleted.

SECURE FILE UPLOAD

1. After logging in, to securely upload files to FGMK, click *Upload*.

2. Select files. Click *Open*.

3. On the next screen, select *Upload All*.

Note: If there are multiple portals, select the desired portal prior to clicking *Upload*.

RESTRICT FOLDER ACCESS

1. Click on *Files* at the top right of the page. Check the box of the folder you wish to secure. (You can only secure one folder at a time.) Click on the box with the 3 dots next to the *Upload* box and select *Secure Folder*. A list of users will appear. Uncheck those you wish to restrict access and click *Save and Close*.

2. If you wish to allow access to previously restricted folders, repeat the steps above, but click *Remove Folder Security*.

Note: Only portal administrators may add, remove, or edit users and restrict folder access.

MISCELLANEOUS

- You may need to unblock pop-ups to view files FGMK has published to your portal.

- The **FOR YOUR ACTION** folder has the government copy of your tax returns, and all your action items, including e-file forms that must be signed and returned to FGMK.

- The **FOR YOUR RECORDS** folder has a full copy of your tax returns and any information you may need to keep for reference.