



THE WOLF GROUP, PC
GLOBAL FINANCIAL SERVICES

Portal Client User Guide

What is a Portal?

Portals are web-based applications that allow for the encrypted, bi-directional transmission and storage of electronic data. In other words, you have instant access to documents and information wherever and whenever you want. A portal, is a place where files can be uploaded, downloaded, stored, and shared in a safe and secure environment — 24/7. Why is my accountant using a portal?

- It's easy to use — This user guide contains simple instructions, but if you've ever used online banking or email, you'll find your portal to be intuitive and easy to learn. Once we create your portal you will receive a few introductory email notifications with additional information and your specific login credentials.
- It's secure — Portals are the most secure way to exchange documents electronically. With identity theft on the rise, portals provide you with peace of mind knowing that the only person who can access your files is you and anyone you designate.
- It's convenient — Whether you want to locate last year's tax return or need to urgently upload a file to send our way, you can do so – anytime, anywhere, thanks to 24/7 access. You won't have to wait for the postal service or make a trip to our office — just log in and get to work. Share PDF files, Microsoft® Excel® spreadsheets, QuickBooks® company files, Microsoft® Word documents, Microsoft® PowerPoint® presentations and financial software data files — and more!

How Else Can I Use My Portal?

You have the capability to grant portal access to anyone — such as a banker who you may collaborate with on a regular basis. Prior to the convenience of portals, options to share information included email, fax, courier, or postal mail. In many cases, you had to request the information from our firm before you could provide it to the bank, and vice versa. Portals have significantly reduced the time and resources spent on trading information.

Your portal will also allow you to:

- Easily upload files of all sizes
- Designate files as read-only or read-write — having the option to disable others from overwriting changes, for added security
- Search, sort, and display documents based on a variety of characteristics

A portal will not only safely transmit your information but it will also help us foster better service, expanded communication, and faster/easier access to the information you seek, at anytime.

The Portal Interface

The interface is suitable for use on any computer and even your mobile/tablet devices. It provides a basic, web-based interface that allows you to use the core features efficiently, such as adding and downloading files.



User ID

Password

Save User ID

[Forgot password?](#)

Log In

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V 1.7

A link to your portal is here: <https://www.clientaccess.com>

Once you login, you'll be directed to your personal, customized portal home page.

Login Screen

Portal Home Page


Your portal home page is where you will exchange documents with us.

The screenshot shows the Portal Home Page interface. At the top left, it says "The Wolf Group, PC". On the right, the user name "Medina, A..." is displayed with a dropdown arrow, and a notification bell icon. Below this is a blue navigation bar with "Medina, Angel" on the left and "DOCUMENTS" and "MANAGE USERS" on the right. A sidebar on the left contains a "Documents" section with "From Firm" and "To Firm" sub-sections, marked with a circled "1". The main content area has a "Documents" header with an "Upload" button and a menu icon, marked with a circled "2". Below this is a table with columns: "Name", "Expiration Date", "Date Modified", "Modified By", and "Size". The table contains two rows, each with a checkbox and a document icon, marked with a circled "3". At the top right of the main content area, there are "DOCUMENTS" and "MANAGE USERS" tabs, with "DOCUMENTS" selected, marked with a circled "4".

Portal Home Page



Home Page Key Features

- 1 Menu Bar** Documents Folder with sub-folder for documents that are from the Firm “From Firm” and documents that are sent to the firm “To Firm”
- 2 Files and Folders** View the list of folders, and files within the folders
- 3 Manage Users** Grant access to others
- 4 Firm Announcements** 

Download Files from Portal

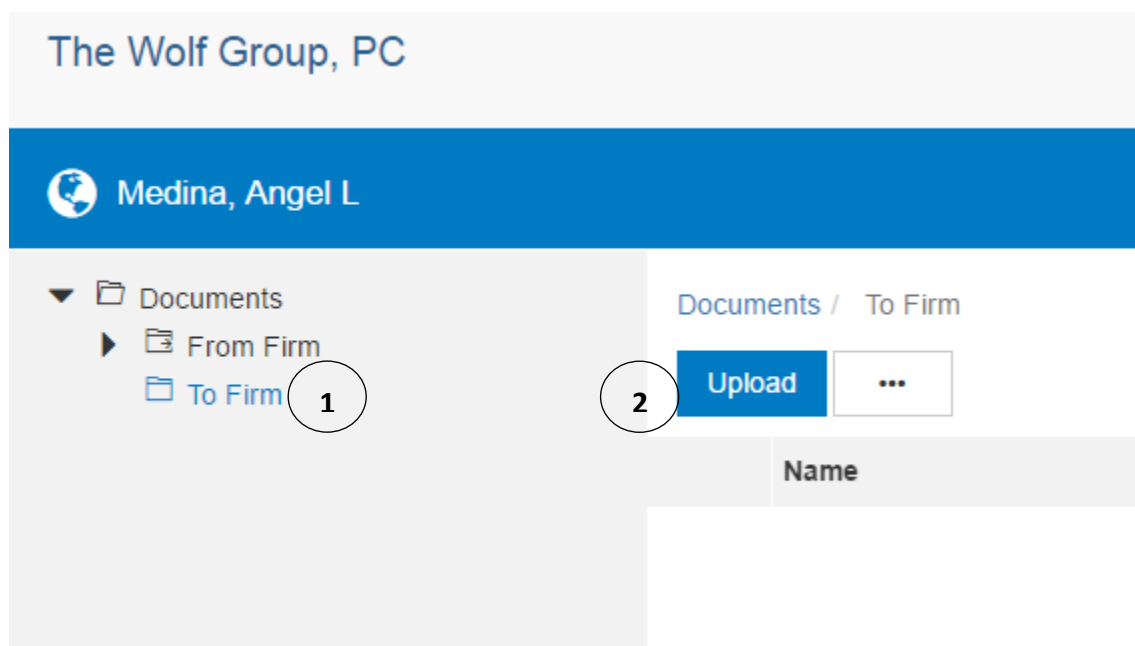
A simple and easy way to download (view or save) a file is to click on the filename hyperlink. The **file download prompt** appears enabling the file to be saved or viewed.

Add Files to Portal

Click **Upload** in the menu bar to begin the process of adding files to the portal.

Steps to add files to Portal

1. In the **To Firm** folder, select the destination folder in Portal.
2. Click Upload, Click **Choose File** and select file(s) to upload from your computer or network.
3. Verify the file location and click **Upload All** to add the file(s) to Portal.
4. The file will appear in the To Firm folder



Add Files to Portal

Upload Queue 1

Close

Overall progress:

Portal	Name	Size	Progress	Status	Actions
Medina, Angel L \ Docu...	Send a file with Share ...	0.07 MB	<input type="text"/>		Cancel Remove

3

Upload All

Remove All

The Wolf Group, PC

Medina, Angel L

- Documents
 - From Firm
 - To Firm

Documents / To Firm

Upload

...

Name

4



Send a file with Share Safe.docx
NEW!