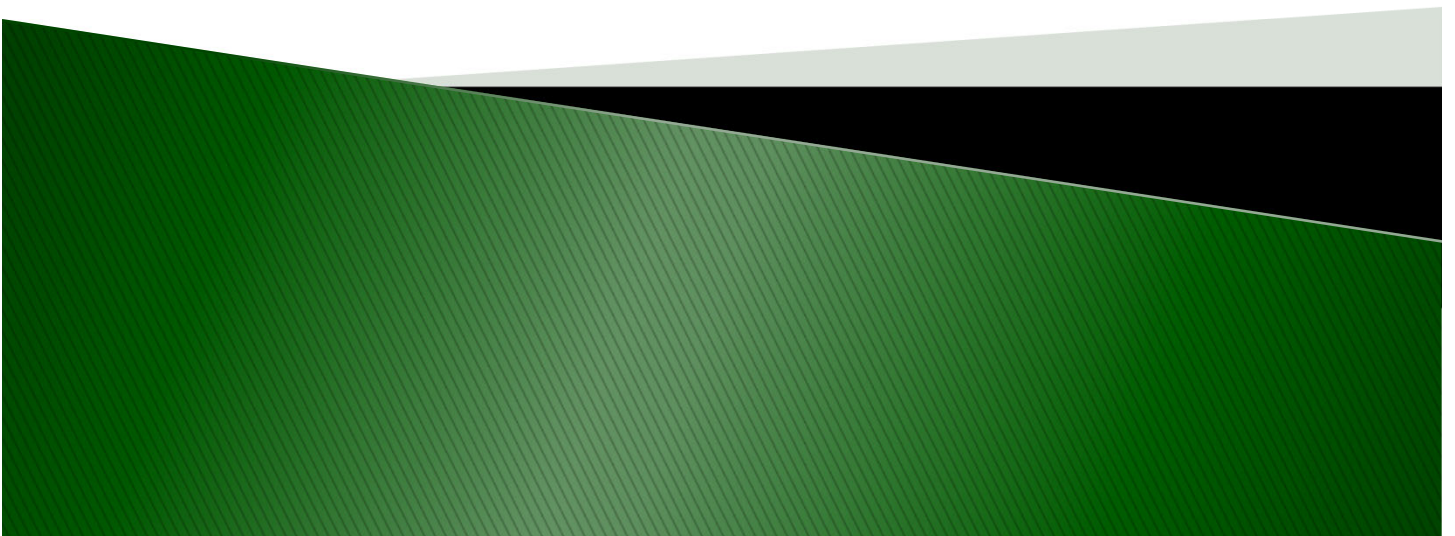


# Client Portal User Guide

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# How to Log In

- ▶ If you have been set up with a client user account, you may log in by visiting [www.gmssurgent.com](http://www.gmssurgent.com)
- ▶ Select the Client Portal Login on our home screen



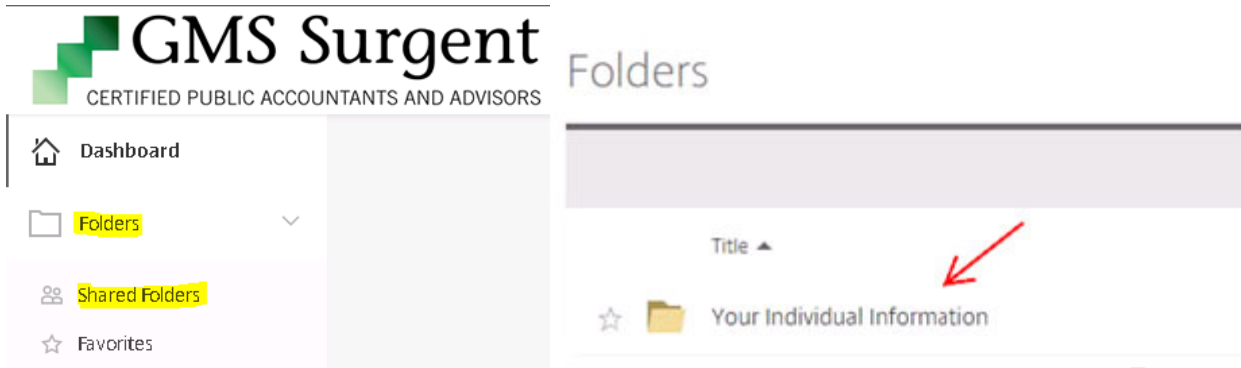
Client Portal Login

- ▶ You will be directed to a username and password screen
  - Username: Your email address
  - Password: Default is First 4 letters of last name (1<sup>st</sup> letter capital) + First 4 digits of your Social Security #, Example: Abcd1234
  - The password is case sensitive and must be a minimum of 8 characters; 1 upper, 1 lower, 1 number and 1 special character.
  - Don't know your password? Hit "forgot password" and follow the prompts to create a new one.
    - GMS Surgent can no longer change this password on your behalf

A screenshot of the GMS Surgent Client Portal Login screen. The page features the GMS Surgent logo at the top, which consists of three green squares of increasing size to the left of the text "GMS Surgent" and "CERTIFIED PUBLIC ACCOUNTANTS AND ADVISORS" below it. Below the logo are two input fields: "Email" and "Password". A dark grey "Sign In" button is positioned below the password field. To the left of the "Sign In" button is a checkbox labeled "Remember Me". To the right is a yellow "Forgot Password?" link. At the bottom, there is a line of text: "If you need further assistance with the Client Portal, please contact GMS Surgent at 484-395-2220." and a "Privacy Policy" link.

# How to Upload Files to the Client Portal – From your computer

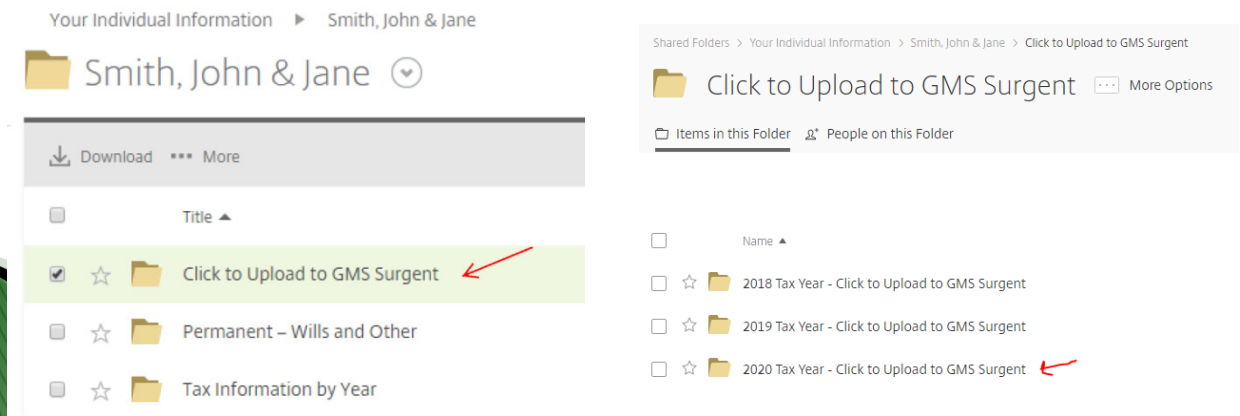
- ▶ Once you are logged in – find the dashboard on the left – select ‘Folders’ – ‘Shared Folders’ – ‘Your Individual Information’



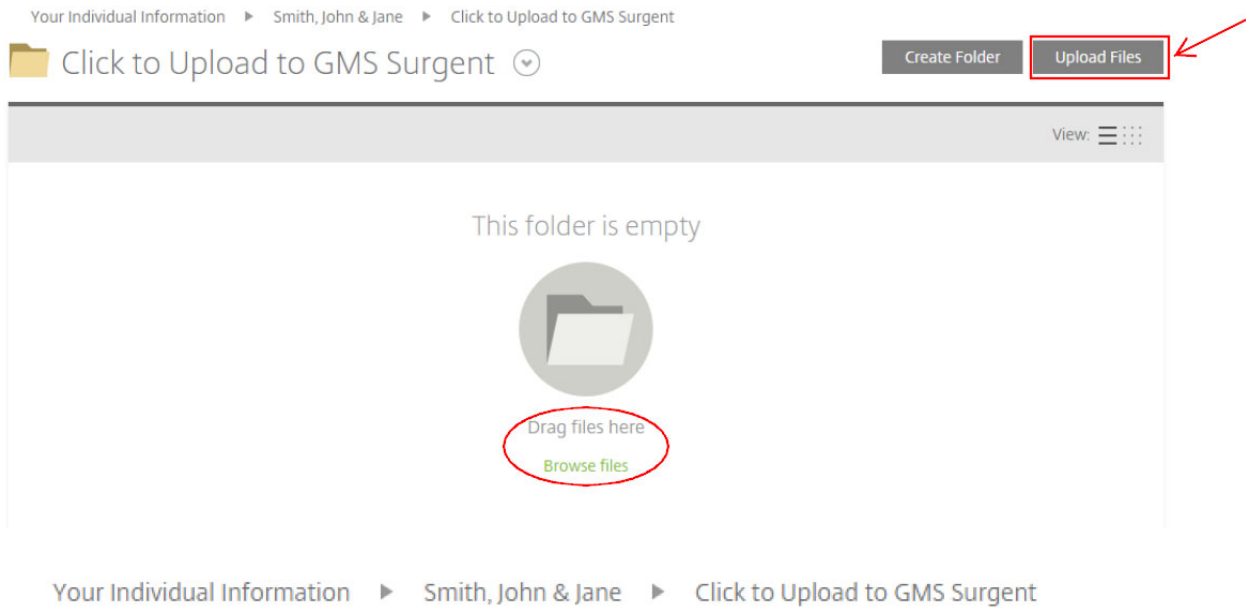
- ▶ Click on the folder with your name (example: Smith, John & Jane)



- ▶ Select “Click to Upload to GMS Surgent” folder – **put your document in the folder by tax year** (Note: this folder and the permanent folder are the only folders you can upload to. You will not be able to upload to the Tax Information by Year folder)



- ▶ You can drag the files into the box OR select 'Browse files' to search for the files you'd like to send.



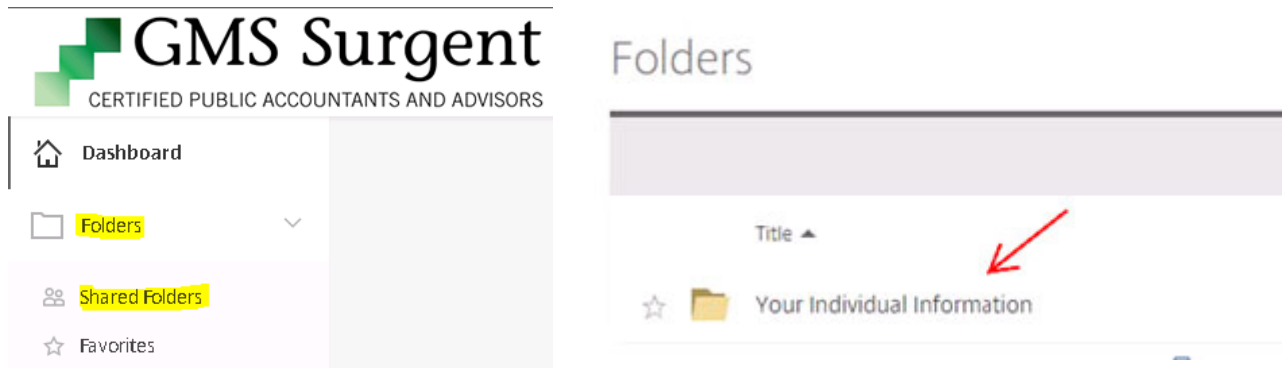
- ▶ Once the documents are selected they are sent safely and securely to the GMS Surgent team who are automatically notified that documents have been uploaded into your folder. We receive this notification email below:



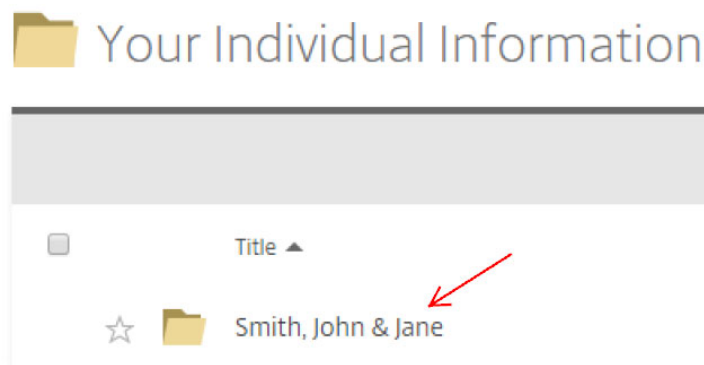
Note: Don't be alarmed if what you uploaded in the past is not there anymore – that just means we moved the info to our internal files.

# How to Download Files from the Client Portal – From our website (never expires) (up to 7yrs available)

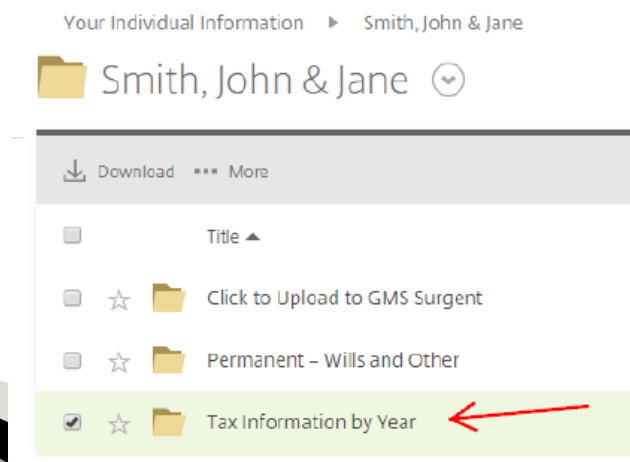
- ▶ Once you are logged in – find the dashboard on the left – select ‘Folders’ – ‘Shared Folders’ – ‘Your Individual Information’



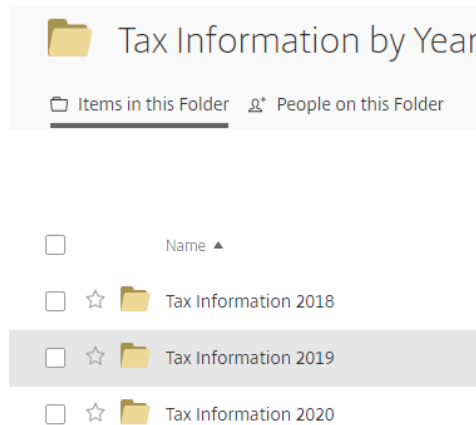
- ▶ Click on the folder with your name (example: Smith, John & Jane)



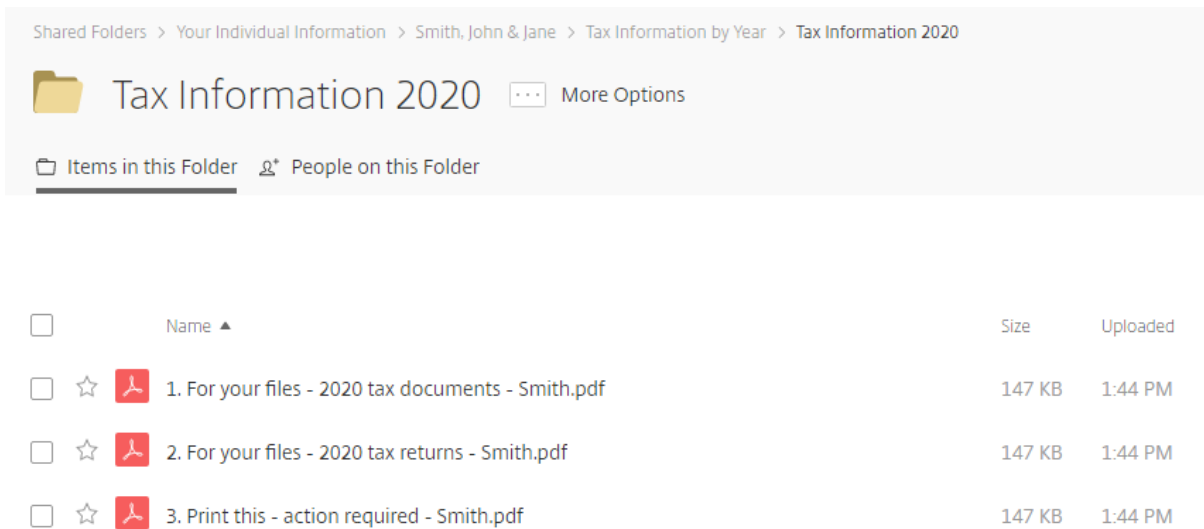
- ▶ Select “Tax Information by Year” folder



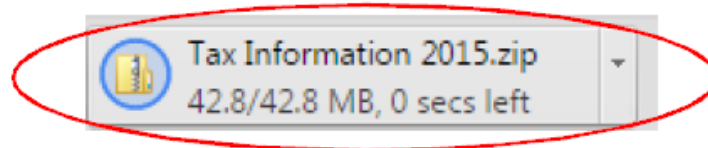
- ▶ Select the Tax Information Year that you would like to view



- ▶ Tick the boxes to the left of the document name and select “download”



- ▶ The files will then download to your computer. If you'd like, you can open the file and save it to any local folder.



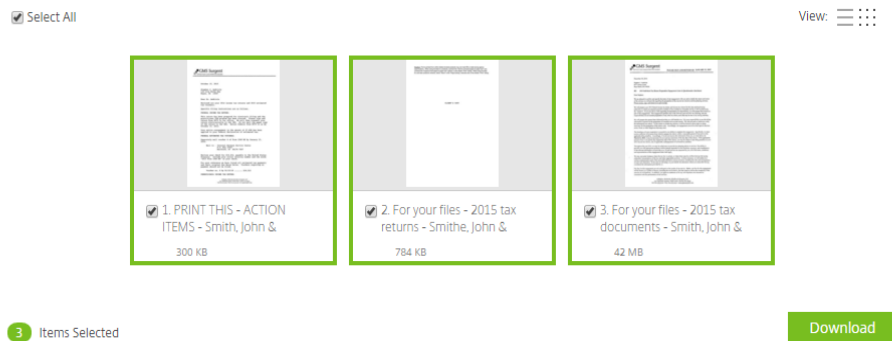
# How to Download Files from the Client Portal – Via the Email Link (expires after 30 days)

- ▶ You will be notified via email when documents are sent to you from GMS Surgent, as seen in the image below. Please note that this link expires 30 days after you receive it. After the link expires, you can still access the information from our website , see page 4.
- ▶ Select “Download These Items” (*Note: you will only have access to the specific folder that the documents were uploaded to*)

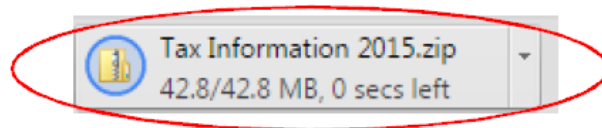




- ▶ You will be directed to a username and password screen
  1. Username: Your email address
  2. Password: (you created)
  3. Click the Log In button



- ▶ Select the green 'Download' button
- ▶ The files will then download to your computer. If you'd like, you can open the file and save it to any local folder.





# How to End Your Session

## On a computer

- ▶ You can easily end your session of the client portal by selecting the 'Log Out' button at the top of your screen

